

## Pastor Portal Help Guide

### Managing Church Leaders

This section will allow you to update the contact information or change a position designation for a church leader record. The information consists of: name, title, email address, mailing address, phone number, church name, and position. The information can be changed under the Church menu; see [church leaders](#) in the appendix for details on using the menu and search for local church leaders.

1. Once you have a list of leaders in the results table, click anywhere in the row to select the leader you want to change.
  - a. Note: You can only change leaders serving at your church. If you click on a leader not in your church their information will be viewable only.
  - b. Helpful hint: To return to the results table click the back arrow in your browser or click "Leaders" on the secondary menu bar.
2. Information about key fields on the edit form:
  - a. Fields with a red asterisk are required. These fields cannot be left blank.
  - b. You can change the email address as long as it is shown as an input field. If the email address is listed as just text, you cannot change it because the address is being used as the username to log into one of the portal sites.
    - i. Note: If the address needs to be changed, contact the church leader and have them change the address.
3. To assign a position to the leader, click the "Add new record" link. Use the select list for the desired position.
  - i. Note: The leader's record can have more than one position record, just keep clicking the "Add new record" until all of the positions have been recorded.
4. To remove a position, click the "Delete" button next to the position you want to remove.
5. Be sure to save the record by clicking the "Save" button in the upper right corner of the screen.

### Adding a Church Leader

Adding a new church leader record is started from the secondary menu bar by selecting "Add a Leader" which is under the "Churches" main menu bar; see [church leaders](#) in the appendix for details on using the menus and selecting a leader.

1. Select "Add a Leader" from the secondary menu bar under Churches.
2. The next step is to see if the person already exists in the system in another capacity. This is an important step as it help to have the persons contact information only once in the system.

3. Use the filter fields on the left to narrow the results table to the right.
4. If the person you need is in the results table clicking on their row will load their information on the "Add a Leader" page.
5. If the person is not in the list then click the "Create" button in the lower right corner of the results table screen.
6. Fill in or make corrections to all of the fields.
  - a. Note: Fields with a red asterisk are required. These fields cannot be left blank.
  - b. You can change the email address as long as it is shown as an input field. If the email address is listed as just text, you cannot change it because the address is being used as the username to log into one of the portal sites.
    - i. Note: If the address needs to be changed, contact the leader and have them change the address.
7. To assign a position to the leader, click the "Add new record" link. Use the select list for the desired position.
  - b. Note: The leader's record can have more than one position record, just keep clicking the "Add new record" until all of the positions have been recorded.
8. Be sure to save the record by clicking the "Save" button in the upper right corner of the screen.

#### **Removing a Church Leader**

If the person is no longer designated to a church leader position, their record needs to be removed. Records are removed by selecting the leader using the "Search" off of the secondary menu bar which is under the "Churches" main menu bar; see [church leader](#) in the appendix for details on using the menus and selecting a leader.

1. Once you have a list of leaders in the results table, click anywhere in the row to select the leader you want to remove.
  - a. Note: You can only remove leaders serving at your church.
2. Click the "Remove" button in the upper right hand corner of the screen.