FELLOWSHIP ONE **DASHBOARD USER GUIDE**

RELEASE 1.0 (USER GUIDE VERSION: 20150908)

Copyright

Trademarks

Contents

Overview

The Fellowship One Dashboard is a web based application designed to give Executive Pastors a high-level summary of key church metrics, such as giving, attendance and attributes. This innovative tool is highly customizable, easy to configure and indispensable for allowing ministry leaders to monitor the overall health of the church.

Choose up to six widgets, each representing a key metric important to your church. Drill down even further by selecting specific funds to include in giving totals, specific ministries or group types to include in attendance totals and specific attributes that portray spiritual milestones, assimilation or other values significant to your ministry.

Metrics can be customized to show totals by week, month, quarter and year, allowing pastors to see both short and long term changes. The data can be viewed in graphical form, making it easy to comprehend trends and compare year-on- year performance.

System Requirements

Fellowship One Dashboard is optimized for use on any mobile tablet device such as the Apple iPad or Microsoft Surface. It may also be used with desktop and laptop web browsers.

Signing in to the Fellowship One Dashboard

Use your Fellowship One portal credentials:

1. Open web browser

2. Navigate to dashboard.fellowshipone.com

3. Enter **Username**, **Password** and **Church Code**

Note: Only users with Contribution Report access rights can view giving information in the Fellowship One Dashboard.

4
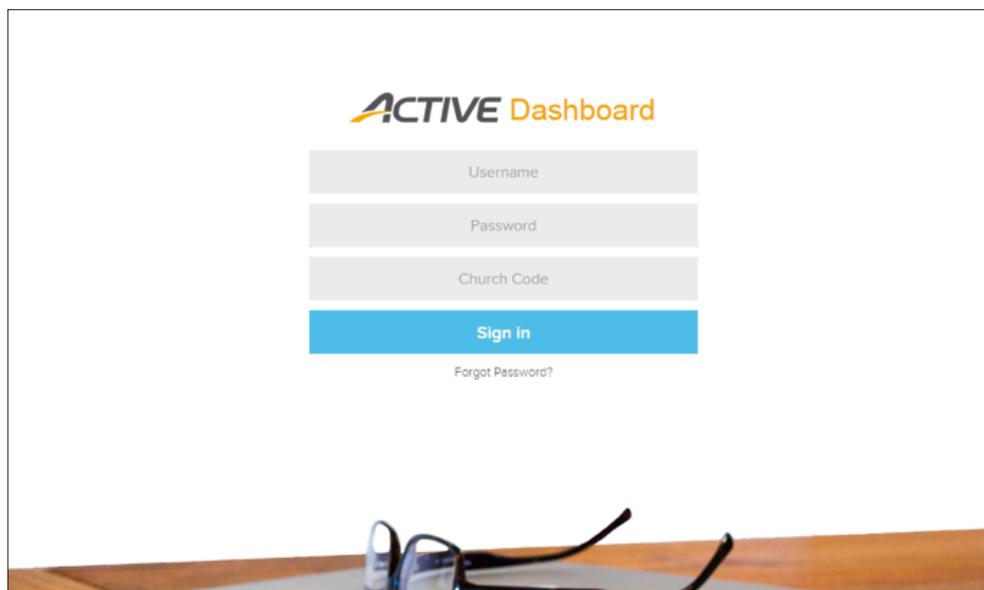
Viewing the Dashboard

When signing in to the Dashboard *for the first time*, the following views and widgets are selected by default:

+ The default view for all widgets reflects the current week

+ **Giving Widget** is switched on. Any funds with contributions in the previous 365 days are selected. This widget shows the total given to all selected funds within the dashboard timeframe.

+ **Attendance Widget** is switched on. Any Ministries or Group Types with attendance in the previous 365 days are selected. This widget shows the total attendance for all selected ministries and groups within the Dashboard timeframe

+ **Attribute Group Widgets** with Salvation, Baptism, Dedication, Re-dedication and Baby Dedication attributes are switched on and have those attributes selected. In the example below, the **Experiences** and **Important Dates** widgets are Attribute Group Widgets.
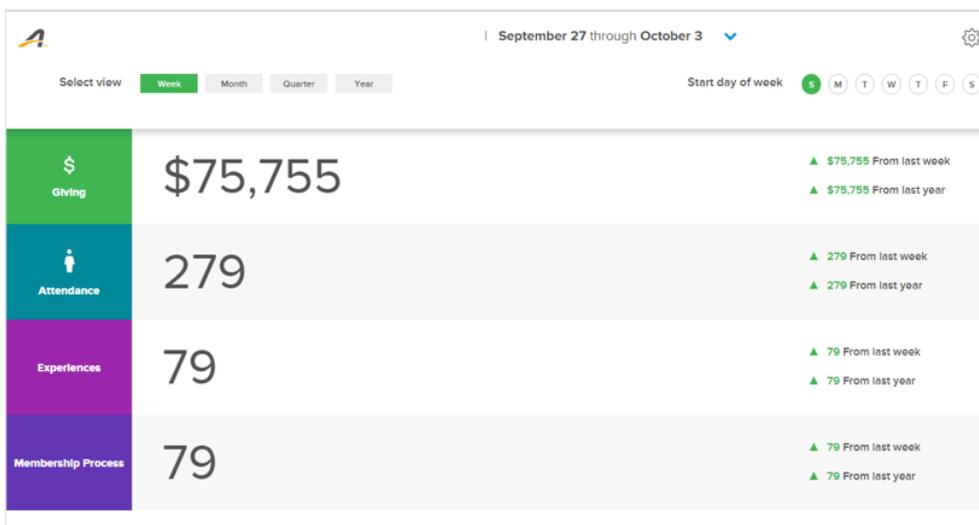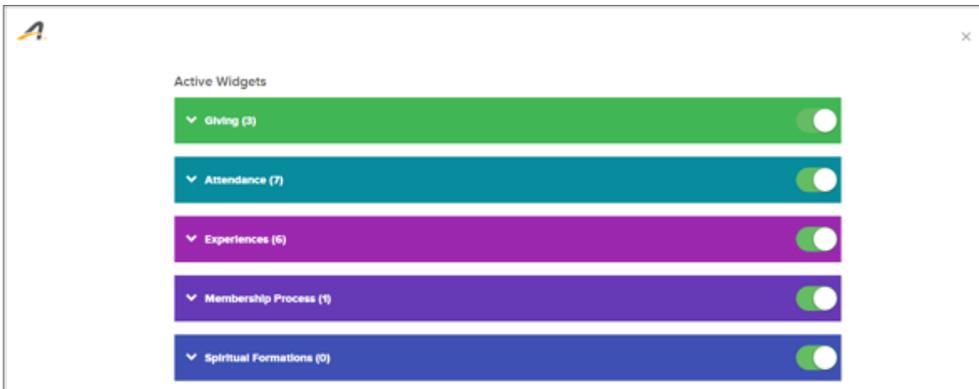

Selecting Widgets

Customize the Dashboard to display widgets and subsequent funds, ministries, group types and attributes important to your church.

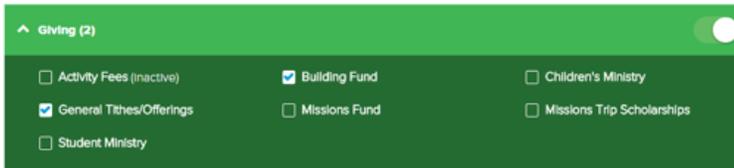1. Tap the action gear to open the Active Widget page

2. Turn on the desired widgets for display *(Display up to 6 widgets at a time)*

Active Widgets

- ⌄ Giving (3)
- ⌄ Attendance (7)
- ⌄ Experiences (6)
- ⌄ Membership Process (1)
- ⌄ Spiritual Formations (0)

3. Tap the name of a widget to view its specific details

   a. **Giving Widget-** Select the funds to include in giving totals.

   ∧ Giving (2)

☐ Activity Fees (Inactive)	☑ Building Fund	☐ Children's Ministry
☑ General Tithes/Offerings	☐ Missions Fund	☐ Missions Trip Scholarships
☐ Student Ministry		

   b. **Attendance Widget-** Select the Ministries and Group Types to include in individual attendance totals.

   ∧ Attendance (10)

☐ Book Store	☑ Children's Ministry	☑ Church Wide Services
☑ College and 20s	☐ Dream Center	☐ Global Missions
☑ KidMin	☑ Life Group	☐ Men's Ministry

   c. **Attribute Group Widgets-** Select the individual attributes to include in attribute group totals.

   ∧ Experiences (6)

☑ Anniversary	☑ Baby Dedication	☑ Baptism
☐ Death of a Loved One	☑ First Time Visitor	☐ Has Served as church staf...
☑ Rededication	☑ Salvation	☐ Wedding Anniversary

   ∧ Membership Process (1)

   | ☐ 1 First Time Guest | ☐ 2 Newcomers Reception | ☑ 3 Membership Class |
   | ☐ 4 Member Induction | ☐ Newcomers | |

   ⌄ Spiritual Formations (0)
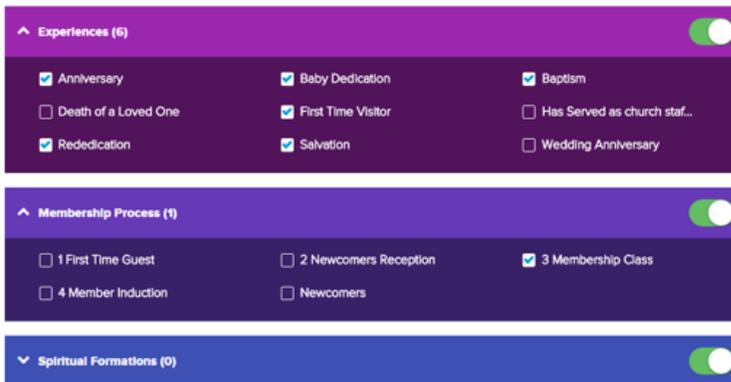
4. Tap the **X** to return to the Dashboard

Active Widgets

Change the Timeframe

Data may be viewed on a weekly, monthly, quarterly or yearly basis. The start and end dates for the selected timeframe are shown at the top of the page. Show or hide the selected timeframe by clicking on the up or down arrow next to the timeframe.

Tap the **Week, Month, Quarter** or **Year** button to view the data over the selected timeframe.

+ If **Week** is selected, tap the required Start day of the week.

Display the Graph for a Widget

1. Tap the widget to open the graph.

The graph header displays the up-to-date total for the current timeframe and previous year's totals for the same timeframe.

The list to the left of the graph displays funds, ministries, group types and attributes selected when the 6 widgets were chosen. Selecting or unselecting items in the list controls whether or not the item is contributing to graph totals.

2. Tap any point on the graph to display totals for that point.

3. Tap the graph header to close the graph.

For the selected timeframe, each widget shows:

+ The total-to-date for the current timeframe

+ The change relative to the preceding timeframe

+ The year-on-year change

Selected timeframe	Horizontal Axis	Charts
Week	52 weeks (1 year)	Weekly total graphs from the current and previous years are superimposed. Executive Pastors can track the trends in the week-to week totals and also compare any week's total with the same week in previous years.
Month	12 months (1 year)	Monthly total graphs from the current and previous years are superimposed. Executive Pastors can track the trends in the month-to-month totals and also compare any month's total with the same month in previous years.
Quarter	4 quarters (1 year)	Quarterly total graphs from the current and previous years are superimposed. Executive Pastors can track the trends in the quarter-to-quarter totals and also compare any quarter's total with the same quarter in previous years.
Year	Multiple years	Yearly total graph Executive Pastors can track the trends in the year-to-year totals.