

Quick-Start Guide for Local Leaders

Managing Your Home Page and Events

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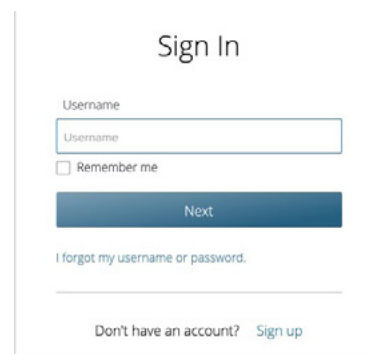
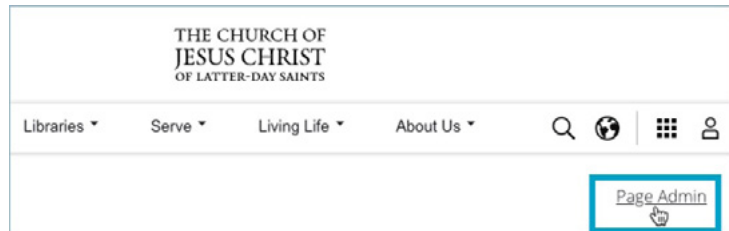
Logging In to the Local Unit Dashboard

Before you get started, make sure you have the following:

- **Your unique ward URL.** It will look something like this: [https://localunits.churchofjesuschrist.org/\[unit name\]](https://localunits.churchofjesuschrist.org/[unit name]). An example: <https://localunits.churchofjesuschrist.org/strathmore-ward/>.
- **Your Church account log-in.**

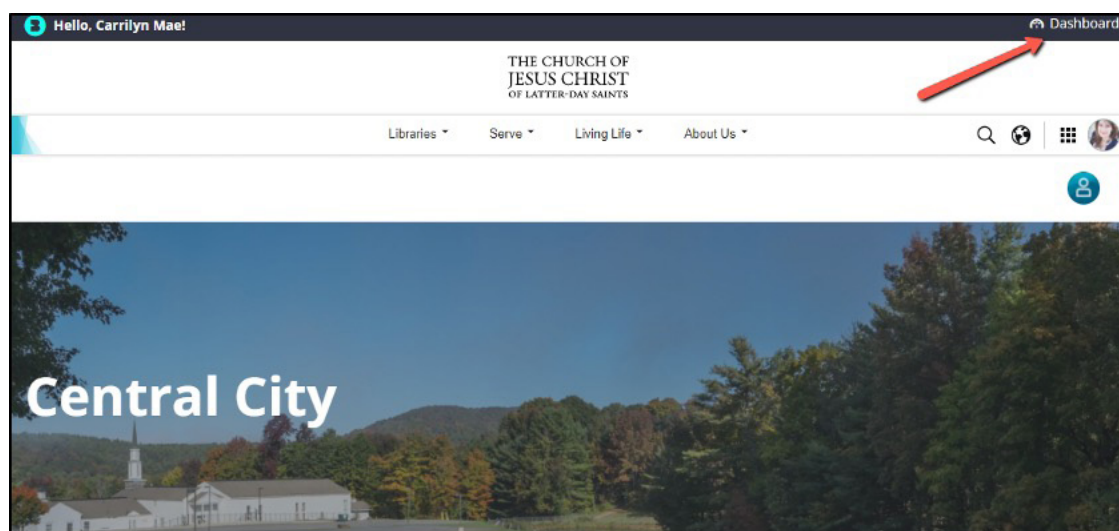
To log in to the dashboard:

1. Open your unique ward URL in a browser tab. (We recommend using Chrome.)
2. Click the **Page Admin** link (not the Church header log-in).
3. Log in using your Church account username and password.

A screenshot of the 'Sign In' form. It features a 'Username' input field, a 'Remember me' checkbox, and a blue 'Next' button. Below the button is a link for 'I forgot my username or password.' and a 'Sign up' link at the bottom.

Note: If you're already logged in to the Church website, you may be signed in automatically and will not have to re-enter your username and password.

4. After you log in, your name will be displayed in the top left corner of the web page and the dashboard link will be displayed in the top right corner. This is your local unit's web page. Click on **Dashboard** to update the home page and access the event publishing tools (and more).

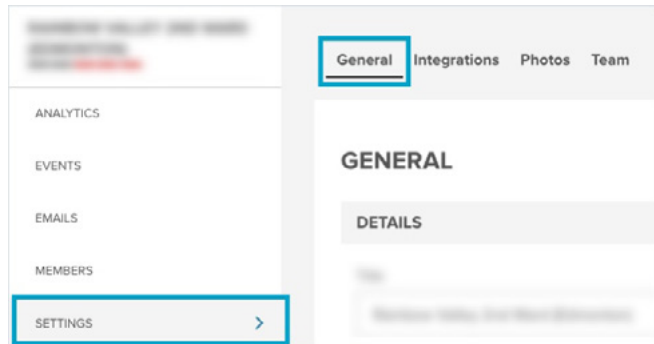


Managing the Home Page in the Dashboard

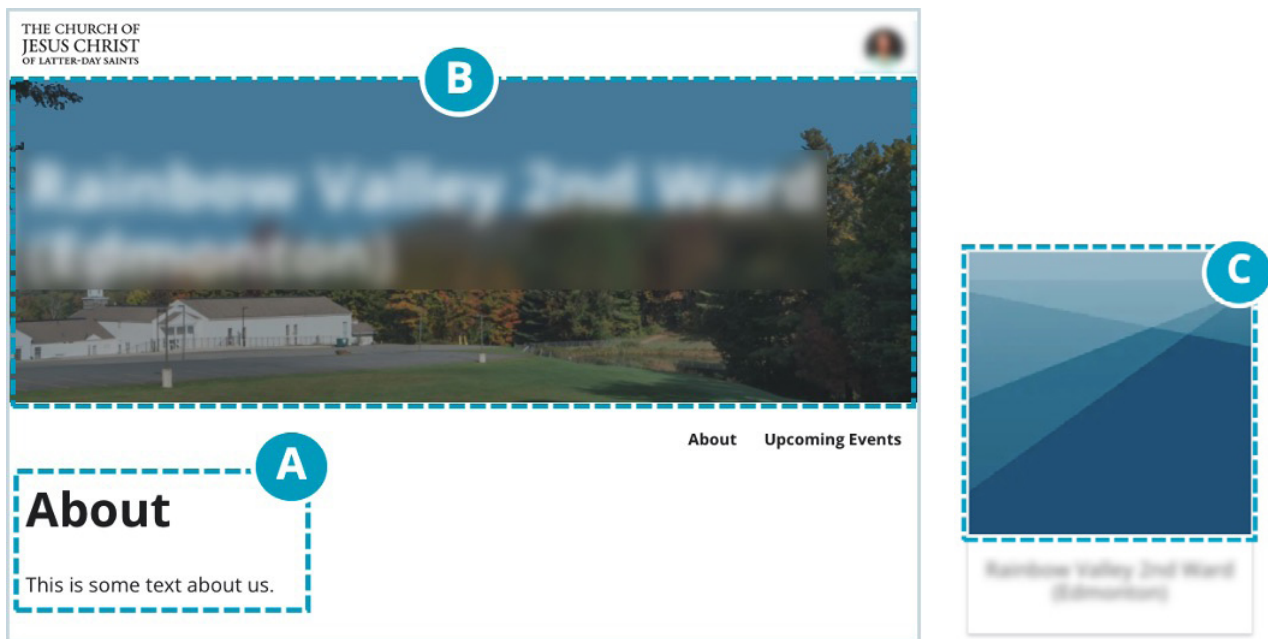
Within the dashboard, you can access several tools from the left navigation bar. This section provides information you need under the “Settings” navigation item.

To modify your page’s text, banner, or logo:

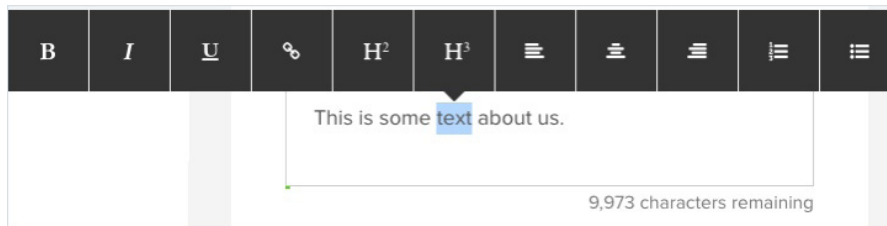
1. Within the dashboard, click **Settings** (left navigation).



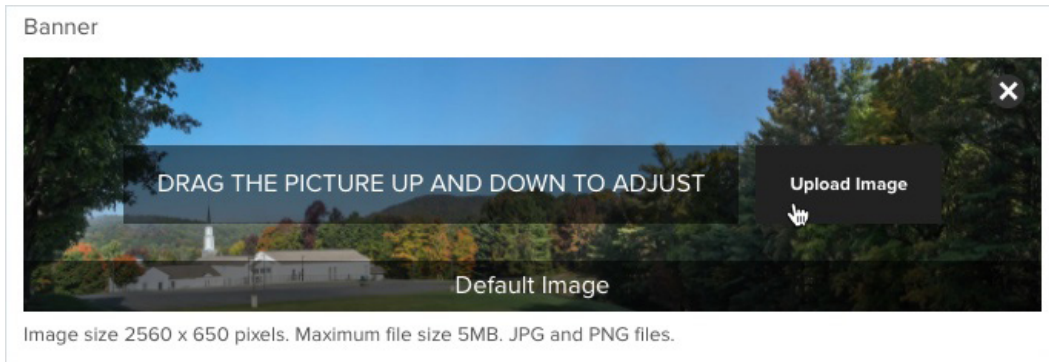
2. You can use the **General** tab to modify the following settings on your page:



- a. **About (text)**—Text displayed below your page banner (optional). You can add bold, italics, and other formatting by selecting the text within the editor. You can also drag and drop images into the editor.



- b. **Banner**—A wide image displayed at the top of your page, beneath your page title. Click to upload a new image to replace the default.



- c. **Logo**—A smaller image (square) used to represent your page when featured on other areas of the site or when shared via links.



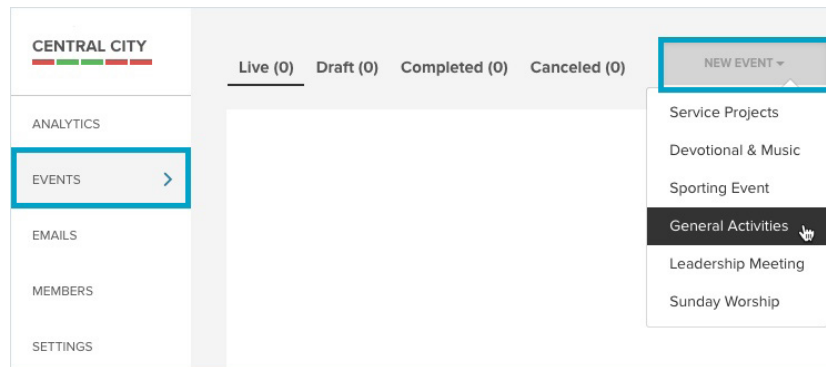
3. When you're ready to publish your changes, click **Save**. The changes will be visible on your page immediately.

Managing Events in the Dashboard

Events are a way to post (publicize) the date, time, location, and information about a specific activity. After publishing an event, the event will also appear with any other published events on your unit's home page under the "Upcoming Events" section. Each event will also have its own web page and URL so that you can share and promote each event online.

To publish an event:

1. Within the local unit dashboard, click **Events** (left navigation).
2. From the event drop-down (top right), choose **New Event**, and select the type of event you want to create.



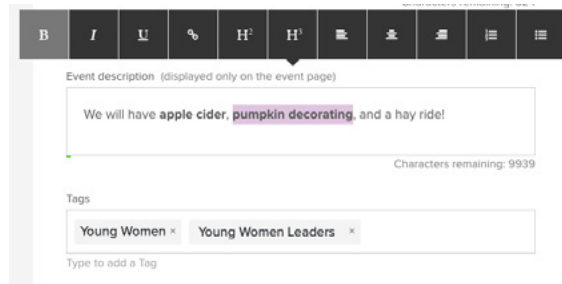
3. On the "General Information" tab, enter the details.
 - a. **Title (Required):** Type the name of your event. Example: "October Social."
 - b. **Short Description (Required):** Type 1-3 sentences to describe the event.

Title & description

Title

Permalink
Permalink will be created after publishing.

- c. **Show Short Description on Event Banner:** Select the checkbox to include the short description below the event title on the banner.
- d. **Event Description (Required):** Type a description of the event that will appear below the event banner. Optionally, select text to add formatting, such as bold and italics. You may also drag and drop images into the text area.
- e. **Tags (Required):** Click inside the box to select one or more tags that help attendees know who the audience is for the event.



- f. **This Is a Hidden Event:** Select this box if you want this event to be private. Private events do not appear on your home page and are accessible to only those with the URL.
- g. **Event Banner:** Optionally, upload a new image to display at the top of your event page.
- h. **Event Thumbnail:** Optionally, upload a new image (square) used to represent your page when featured on other areas of the site or when shared via links.
- i. **Schedule & Agenda:** Set your event start and end dates and times. You may schedule events for multiday and/or recurring (most events will be one day). Optionally, build a detailed agenda that will appear on your event page. (Use the magic wand icon to enter sample data to start from.)
- j. **Location (Required):** Enter the location where your event will take place. Location details appear on the event page and within confirmation emails upon registration.

Venue name 

Central Perk Cafe

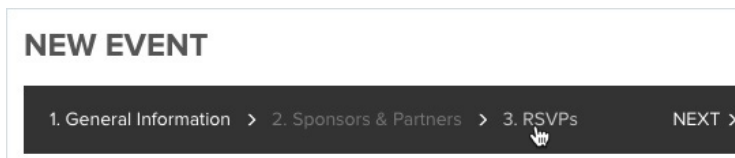
Street address

4 Pennsylvania Plaza


City Zip code

New York 12345



- 4. Click **Next** and **Next**, or jump directly to the **RSVPs** tab. (You will not use and can ignore the “Sponsors & Partners” section.)



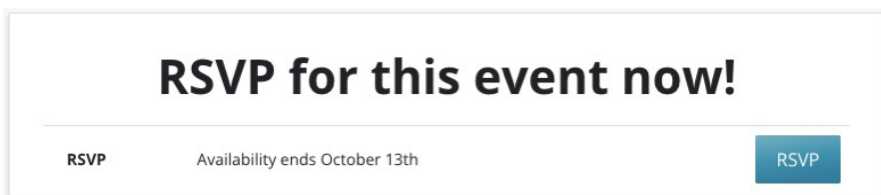
- 5. For each event, you can enable the RSVP feature to capture registration for an event. Enter the details for the RSVPs.

SET YOUR RSVPs 

Title Quantity

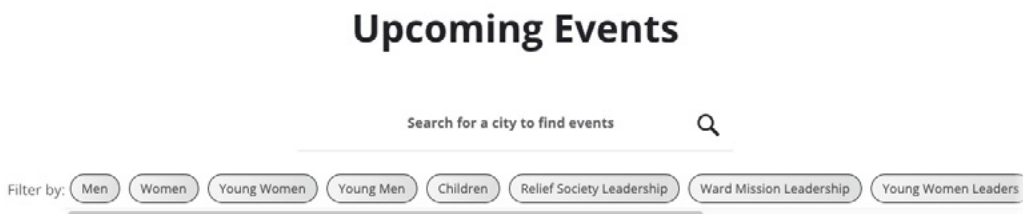
RSVP 200 200/200 Available  

- a. **Title:** Type **RSVP**.
 - b. **Quantity:** Set the maximum number of registrations allowed for the event, depending on capacity limits of the venue. You may enter a large number here to allow unlimited registrations.
 - c. **Start and End Dates for Registration:** You can also click the gear icon to set start and end dates for registration.
6. Click **Save Draft**.
 7. Click **Preview** (at the bottom of the page) to see what the event page looks like!
 8. From here, you can continue to make changes, upload images, refine your event post, and save your draft.
 9. When you're finished making changes and are ready to publish your event live on the website, click **Publish**.
 10. Registration is also now open after publishing.

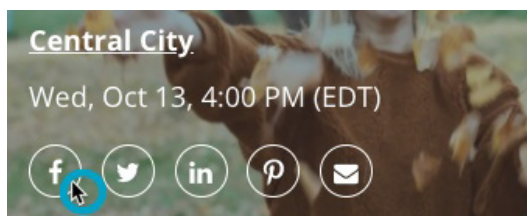


To view events on the home page (upcoming events):

1. After you have posted (published) an event, return to the home page.
2. Scroll down to the "Upcoming Events" section.



3. Select the desired event to see the details of the event, where you can share details on social media or register for the event.



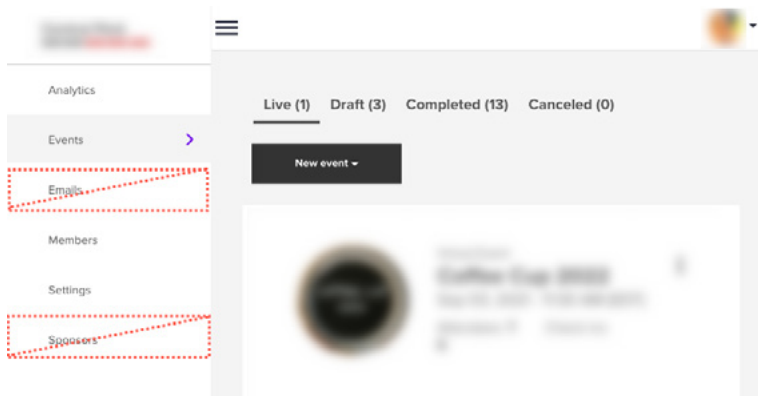
Frequently Asked Questions

What sections in the local unit dashboard should I ignore?

Some settings of the software don't apply to our needs. You may ignore the following features within the dashboard.

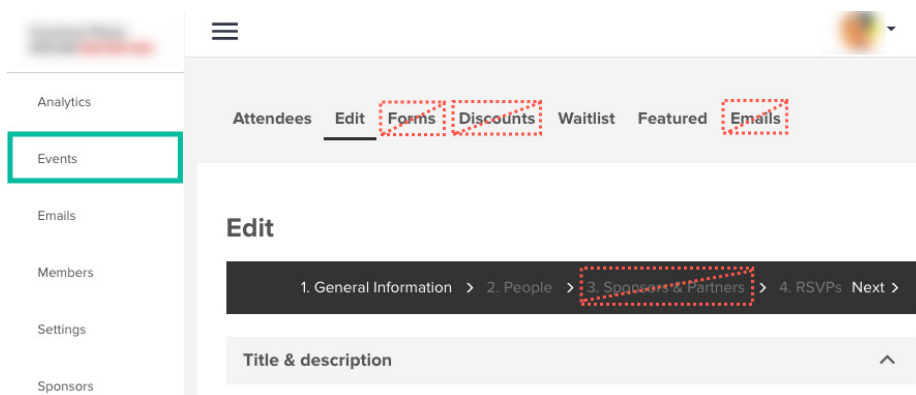
Local Unit Dashboard—Left Nav (General):

- “Sponsors” tab (sponsors, invoices, partners)
- “Emails” tab



Local Unit Dashboard—Left Nav (within Events):

- Forms
- Discounts
- Emails
- Sponsors & Partners
- Event Tracking (unless you know how to use this feature).



How do I share an event?

Within the event details, you can find a permalink after publishing. This is a short link that you can use whenever sharing the event. This link takes up fewer characters than the full event page URL. Permalinks look nicer when sharing in emails and online, especially on social media, where posts may have character limits.



The screenshot shows a form titled "TITLE & DESCRIPTION" with an upward arrow icon. Under the "Title" label, there is a text input field containing "October Social" and a character count "86 characters remaining". Below the title field is the "Permalink" label, with a text input field containing the URL "https://churchofjc.bevylabs.com/e/mrfp3r/". The permalink field is highlighted with a blue border.

What does the “Members” section in the dashboard indicate?

The “Members” tab in the dashboard includes Church members who have signed in to the dashboard via Church account SSO (not guests).

How do I see a list of guests who have registered for an event?

Select a published event. Within the event screen, click the **Attendees** tab. Only people who have RSVP'd for the event via the online registration will be listed.

How do I reschedule or edit an event?

Within the dashboard, click **Events** (left navigation) to locate the event you want to edit. Select the desired event to make necessary changes, and then click **Publish** to reflect the new details. *If you modify the date or time of the event*, a prompt may appear to allow you to send an email to anyone who has already registered for the event so that they receive an automated email about the changes. If you decline, no email will be sent.

How do I cancel my event?

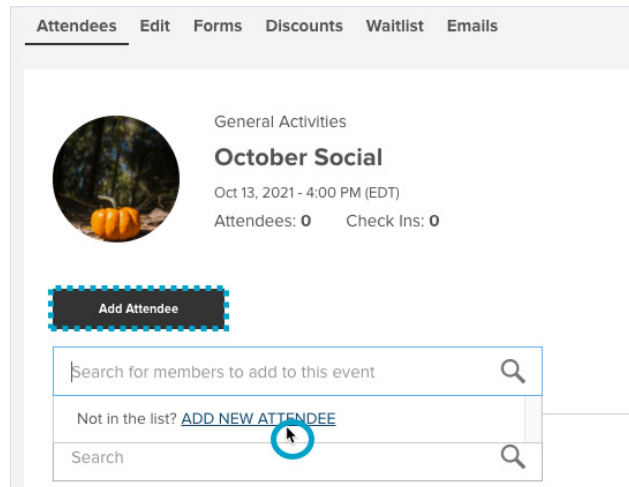
Within the dashboard, click **Events** (left navigation) to select the event you want to cancel. Click the **ellipsis** (three dots) next to the event, and click **Cancel**. A prompt will be displayed to confirm you want to delete this event from your listings.

How do I add an event attendee?

Leading up to your event, you can track registrations on the “Attendees” tab of the event. On the day of your event, you can optionally

- manually add attendees who show up but did not register on the website or
- manually check in attendees to track actual attendance.

Within the dashboard, click **Events** (left navigation) to select the event you want to edit. On the “Attendees” tab, click **Add Attendees** to enter the attendee details.



How do I check in an event attendee?

On the day of your event, you or another member of your staff can use the local unit dashboard to check in attendees at the door. Within the dashboard, click **Events** (left navigation) to locate the event you want to edit. Or from your chapter page click **Check In Attendees**.

On the "Attendees" tab, search for the attendee name, and then select the checkbox under the "Check In" column.

Name	Ticket Type	Registration Date	Check In	
Walter Green	Individual	Oct 13, 2021 - 4:00 PM	<input checked="" type="checkbox"/>	⋮
Walter Green	Individual	Oct 13, 2021 - 4:00 PM	<input type="checkbox"/>	⋮

When the event is over, you can compare your attendee count (registrations) with your check-in count (actual attendees).

