

# iServe Setup Checklist

Once you subscribe to iServe, we will need certain info so we can get you setup and ready to use it to connect your members and service.



## ○ Church congregation logo (+dark mode logo)

The logo is used on the online and mobile apps to personalize it for your congregation and appears on reports. The dark mode logo is needed for the dark mode function of the mobile apps. *If you do not have a logo, we can figure out what graphic we can use for iServe.*

## ○ Assign Contact/Admin for iServe

iServe needs at least one admin per installation to maintain the database, application and be the point person for the congregation. A congregation is not limited in how many admins they have, however it is encouraged that there not be too many admins over the system.

## ○ Member Information List/Database

We must have a list of members and their information. If you have a previous database program or spreadsheet, it can be uploaded/sent. A template is available that can be used to create the info list (link at bottom or in account online after purchase). *For an additional fee, we can also help create the database if you do not have one available.*

## ○ Person Types List

Person types allow you to view, classify, and group members in the app and determine viewability in the app (not functionality). You can choose to use the default settings for types, adjust the settings or upload an edited CSV file with adjusted types (link to template at bottom or in online account after purchase).

## ○ Access Level Roles List

The access roles allow various levels of access to information and permissions for various functions. You can choose to use the default settings for types, adjust the settings or upload an edited CSV file with adjusted types (link to template at bottom or in online account after purchase).

## ○ Schedule of Services

In order to use the attendance function for services, you must set the schedule of services in the settings. This can be a recurring schedule of your scheduled events. Individual events can be scheduled for groups and attendance taken within those groups as well.

## ○ Groups List

Different groups may be created for organization, scheduling events, taking attendance, messaging and push notifications. After these groups are made, an admin can add members to the groups and also assign "Group Admins" that can manage the groups and group functions.

## ○ Involvement Categories & Areas

iServe allows members to select involvement areas (ministries) to be involved in their profile. Put together a list of categories and involvement areas for members to select. Use the downloadable template to get these involvement areas created in the app (link at bottom or in account online after purchase).

