

How to Install and Setup the LEAD App

What is the LEAD App?

- The LEAD app equips leaders with the information and tools they need to understand their people and see their patterns of connection and involvement, so they can better disciple them. The mobile platform makes it easy and intuitive to interact with on the go, where real ministry happens.
- In the LEAD app you will be able to quickly send a Message to all Group members, take attendance for your Group, access and edit Profiles of your Group members, view upcoming birthdays and anniversaries, send a Need, view Notes, or interact with Schedules.

Who can use the LEAD App?

- Admin Privilege (any Admin privilege assigned to a Profile)
- Group Leader (both Main and Assistant leaders)
- Department Admin
- Event Organizer
- Needs Coordinator
- Schedule Organizer
- Position Leader
- Process Manager
- Queue Manager
- Form Manager

- Any 'Leadership Role' e.g., Executive Pastor, Volunteer Coordinator, etc. (the ones set on the Campus Settings page)

To learn more about these Privileges see our help article [Admin Privilege Explanations](#).

Warning: This app is **not intended** for congregant use (in fact, if they do not have a privilege mentioned above, they won't even be able to log in).

Note: The amount of information a user can see is the same as they would be able to see in the browser version. It will be based on which of the privileges above a person has.

Getting Started

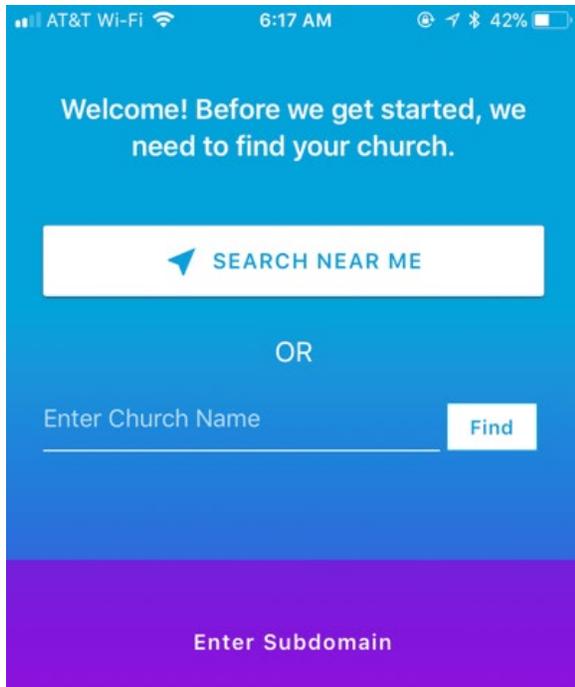
If you have not done so yet, download the LEAD app from the Apple store or from Google Play.



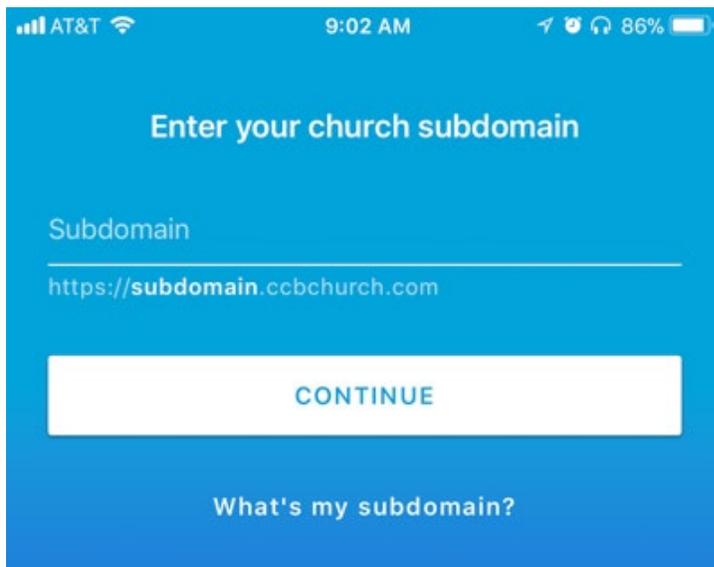
Finding Your Church

Warning: Location and Name search are only available for churches in the US & Canada. You must have address information (including country) filled in on your Campus settings for your church to show up on the list.

- If you are new to the app you have the option to find your church through by tapping the **Search Near Me** button or typing your church's name in the **Enter Church Name** field.

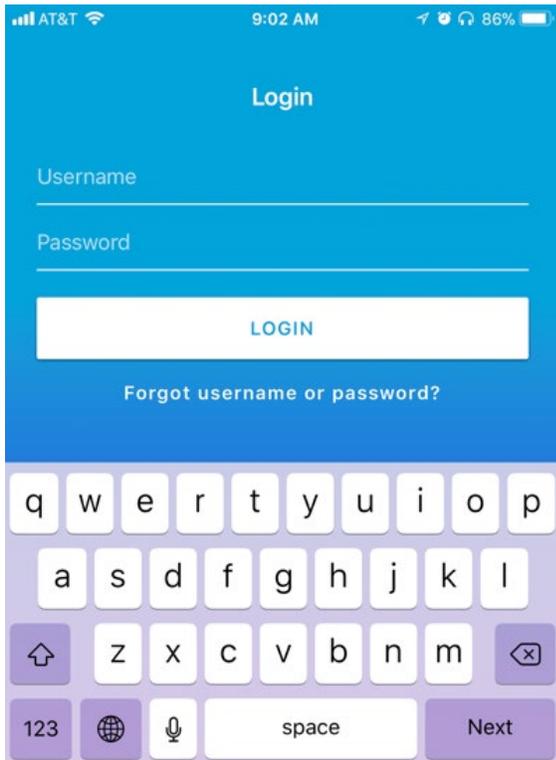


- Or, you can type in the subdomain from your church's main site by tapping **Enter Subdomain** at the bottom of the screen.
- Select **Enter Subdomain**.

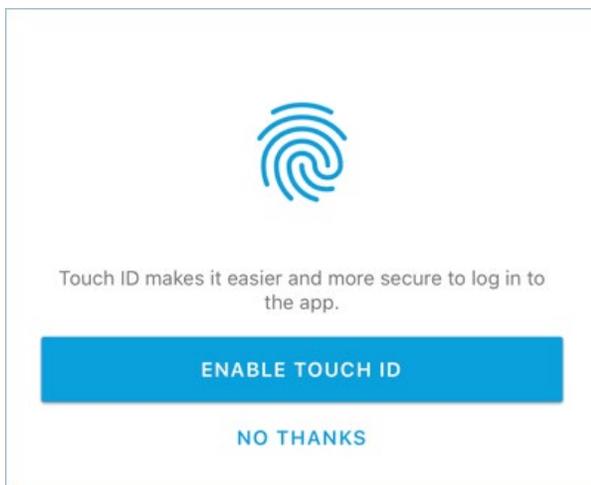


Logging In

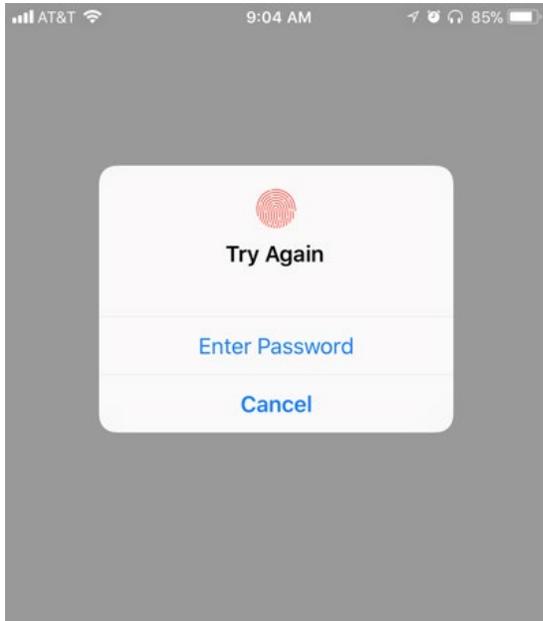
- Enter the email address or username and password you use to log in to your desktop Church Community Builder site.



- **For iOS only:** you can enable the optional Touch ID security feature.



- If accessing the app using Touch ID fails, you will receive a **Try Again** pop-up to use your password instead.



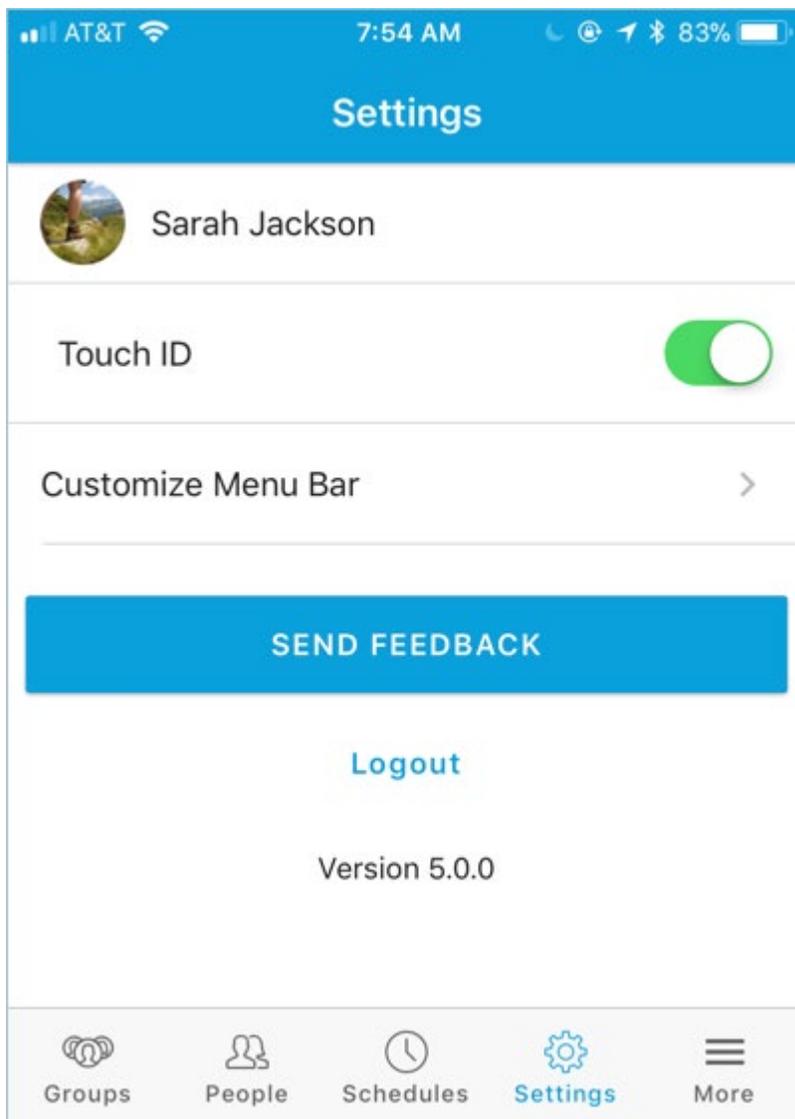
- For additional security, if you re-access your app and are prompted for a Touch ID but it fails you will be prompted to create a Passcode.



Settings

Touch ID

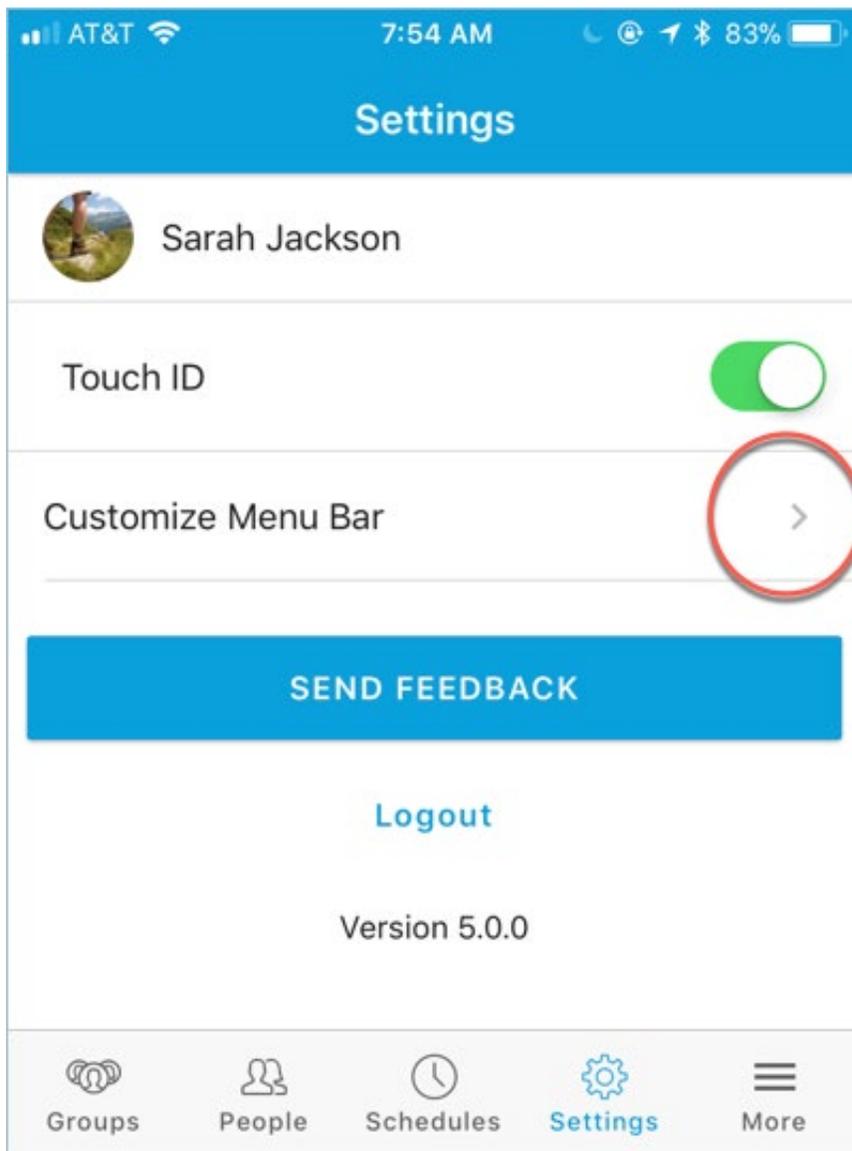
1. You can enable Touch ID later by going to **Settings** at the bottom of the screen of the app
2. If you do not see **Settings** choose the **More** menu to view **Settings**
3. Toggle to enable this feature



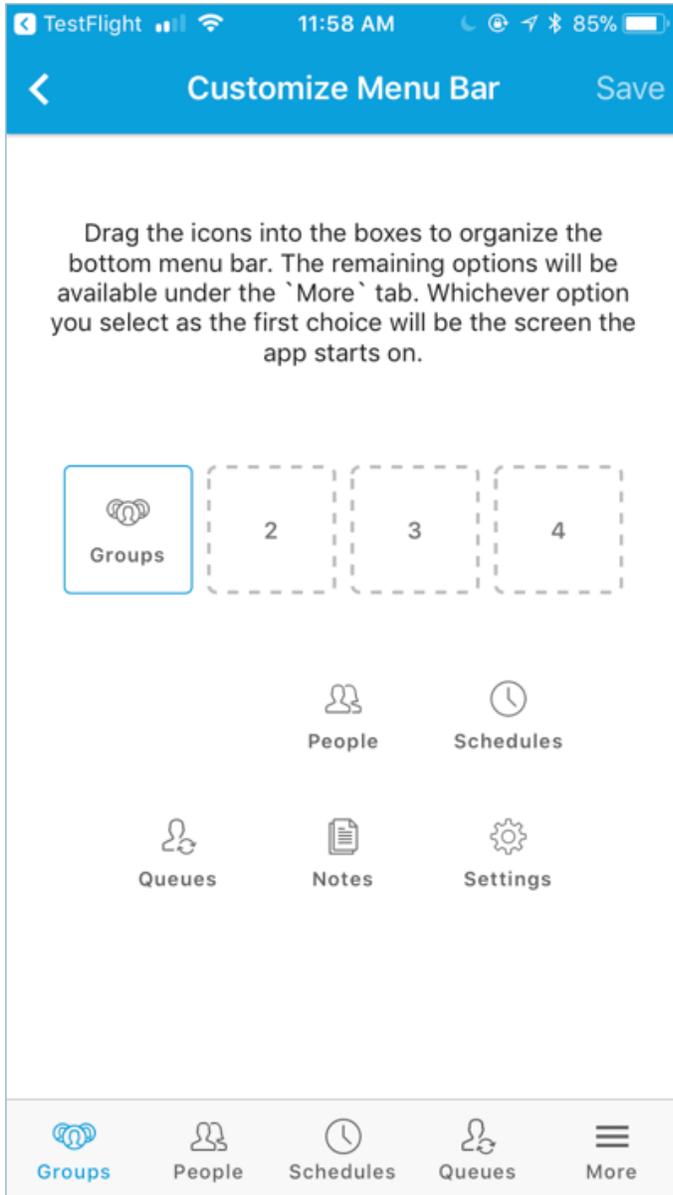
Customize Menu Bar

Customize your menu bar to view or prioritize the top four areas you need for easy access.

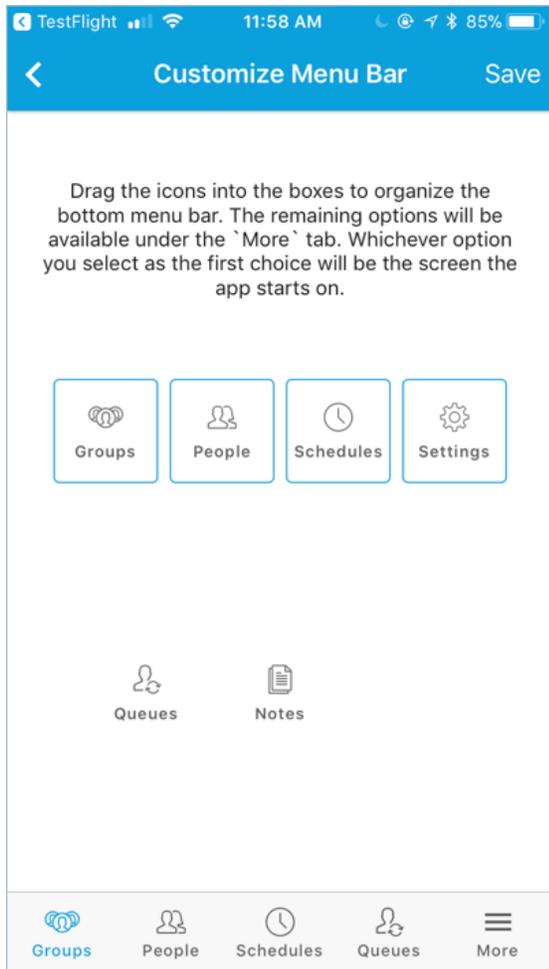
1. Log into the app.
2. Choose **Settings**.
3. Tap on **Customize Menu Bar**.



4. Drag and drop what four areas you would like to see in your menu bar.



5. Whatever order you decide to put these tiles in order is how it will appear when you open your app.



People Tab



The first tab in the Lead app covers **People Profiles**. With it you can:

- Quickly contact a congregant or get directions to their address.
- See at a glance key factors in their involvement including giving, serving and attending.

- See a timeline of their activity.
- View and Edit their contact information.
- Quickly see and edit family members as well.

Click the icon to get more information about the People Tab.

Groups Tab



Groups

The Group tab in the Lead app lets you see all **Groups** you are apart of. With it you can:

- Take Attendance on events.
- View and Send Messages.
- View/Add/Remove participants.
- Send Group Texts.
- Create and inform people of Needs.
- View Special Days on your group members.

Click the icon to get more information about the Groups Tab.

Queues Tab



Queues

The Queues tab in the Lead app lets the **Process or Queue** manager follow up with people assigned to you. With it you can:

- See individual's assigned to your Process or Queue's Profile.
- You can quickly contact these individuals.
- View and leave Notes about them.
- Mark them as Done.
- Perform a number of other Queue-related actions.

Click the icon to get more information about the Queues Tab.

Notes Tab



Notes

The Notes tab in the Lead app lets you all of your recent **Notes** at a glance. With it you can:

- Quickly add a new Note.
- Filter already created Notes.
- View Notes written by you or shared with you.

Click the icon to get more information about the Notes Tab.

Schedules Tab



Schedules

The Schedules tab in the Lead app lets the **Schedule** Organizers or Admins manage existing Schedules all in your hand. With it you can:

- Quickly view current or past Schedules by week and service times.
- Filter who needs to fill a position.
- Add, change the status, or remove volunteers from current Schedules.
- Send customized messages to Volunteers.
- Add and manage Service Plans.

Click the icon to get more information about the Schedules Tab.