



Ministry Guide

Administration

Introduction

Church Administration is not a function of ministry that gets outward attention. Admin is typically behind the scenes performing tasks like crunching numbers, managing the calendar, working with outside vendors, managing records & more. Without your attention to detail and a high level of organization, most ministries would sit idle. One could make a good argument that if ministry was a car, you would be the key.

No church is the same when it comes to Administration. Many churches delegate all admin functions to an assistant/secretary while others lean on the Senior Pastor to fulfill the majority of the churches administration needs. Some churches even take a hybrid approach to delegate various admin functions to key staff members or volunteers within the leadership.

Keeping in mind that every church has its own unique way of handling Administration tasks, we've made ChurchTrac easy-to-use. The software is organized into 7 different sections or "Screens" which you can navigate. These screens include:

1. Home/Dashboard
2. People/Families
3. Events/Attendance
4. Worship/Scheduling **Plus Plan Only*
5. Giving/Pledges
6. Accounting/Budgets **Plus Plan Only*
7. Settings

From each of these screens, you will find unique features that apply to those particular pieces of the software. For example, the Events/Attendance Screen is where you can find the Calendar, Attendance Reports, and manage your locations. Likewise, if you navigate to the People Screen, you can add/edit people, create Tags, and Message your people.

In this overview, we will briefly touch on some of ChurchTrac's popular features to show how you can use them within your area of Administration. For an in-depth detail on software features, go to www.churchtrac.com/support for the Online User Guide.

Quick Tip: You should create ChurchTrac User Accounts for your pastors and other key staff and leadership. ChurchTrac has powerful features that can help every ministry.

People

Keeping track of your people is vital to the church's health. It's important to know about your people and know them personally. You need to have an all-in-one place where you store basic information about each person.

If you were already using a Church Management Software or have some sort of spreadsheet with all your people, ChurchTrac can do a Data Import to save you a great deal of time. To have us do a

Data Import for you, go to https://www.churchtrac.com/support/getting_started/importing-data-from-a-spreadsheet-or-csv-file.

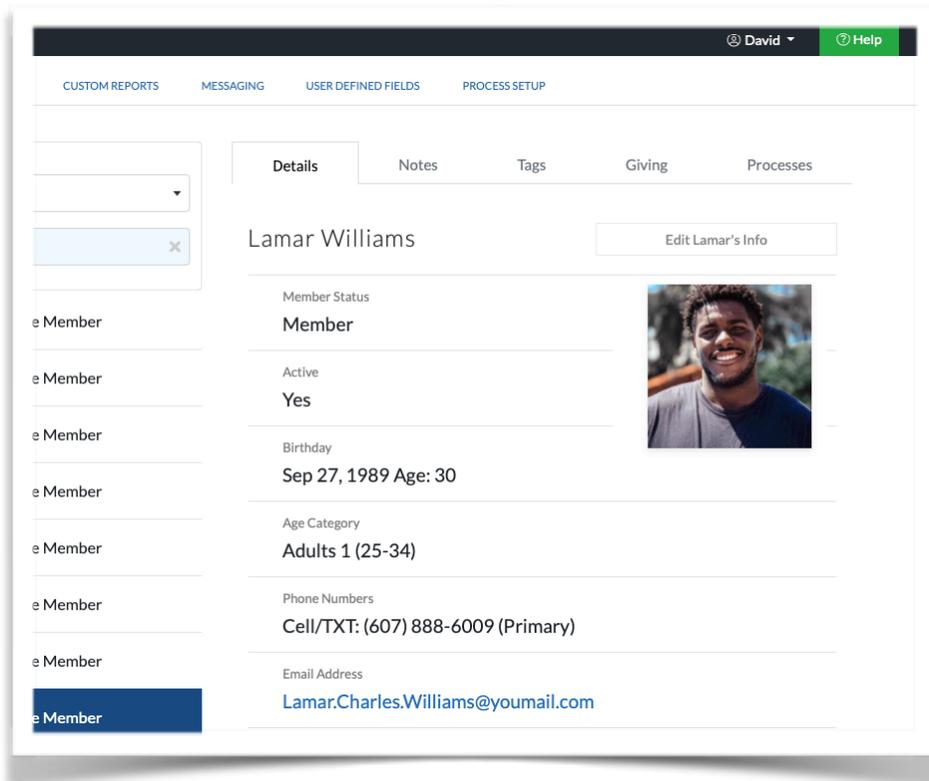
If this is the first time you're adding your people into some sort of database or digital format, simply proceed in adding each person manually.

Question #1: What information do you want to record for your people?

A few years back, Google had a video in which they showed how their web search feature was able to help a farmer in Kenya save his crops. His newly planted potatoes unexpectedly started to die. He was able to do a quick internet search to help him determine that ants were the root cause of his crops dying. He was able to find the remedy for his dilemma and have a successful harvest for his village. At the end of the video, he said that *"Information is powerful, but it is how we use it that will define us"*.

Determining what information you want to record for your people is important in helping you minister to them. Much like that potato farmer, how you use that information will define you and your ministry. Here are some great examples of different types of information and how you can use it:

- Knowing how many children and their ages of each family so you can determine if there is a need to create more children's classes.
- Knowing where each family lives so you can decide the best geographical spots to hold home bible studies.
- Having each members email address so you can keep them in the loop with a monthly email.
- Recording the cell phone number of a visitor so you can reach out to them on a visitation.
- Knowing the date of a visitors first visit to help you determine if they are still an active visitor.



These are just a few of the many great examples of why it is important to store basic information about your people. If you have not already done so, we encourage you to create a game plan of what basic information you want to gather for the people at your church/ministry.

Caution: There is such a thing as having too much information. We recommend only recording information that you choose to actually use. Needless information can quickly turn into noise that can distract you and anyone else who is using ChurchTrac.

As you add your information on the **People Screen**, you may find that you need to add special fields for an individual. These are called "**User-Defined Fields**". Because every church/ministry is different, we recognized a long time ago that you need to have the ability to create your own. Once a User-Defined Field is made, it will be visible in your "Details" tab for each person.

Question #2: How do you communicate to your people?

Obviously, your Senior Pastor communicates to the church during the services. But not everything can be communicated from there. There are times when you need to get a message out to either select groups of people or all of your people at once. Messaging lets you do that.

With **Messaging**, you can get a message out to your people in the form of an email, a text message, or even a voice message. This tool enables you to spend less time sending out multiple emails, making phone calls, or having to write individual text messages.

Text Messages and Voice Messages require the additional purchase of Messaging Credits.

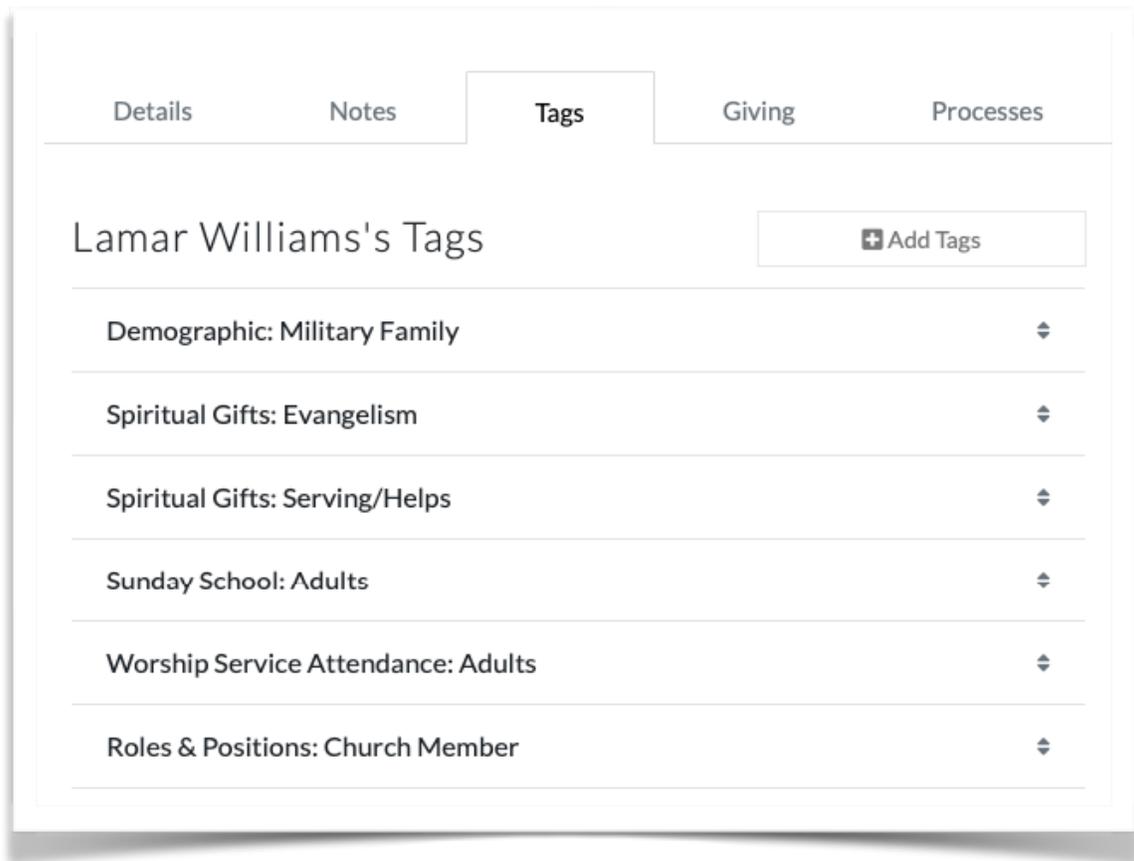
Smart Lists are custom list's of people that are align with fields that you choose. For example, if you have a **User-Defined Field** named "Bible Study Teachers", you can then create a Smart List that has only those people. This is very helpful when you want to quickly send an email or even a text reminder about an upcoming event.

Tags

Tags are the foundation for organizing your people into groups, knowing their areas of service, and tracking their attendance. A Tag is like a label that you apply to a person, and you can create a tag for just about anything! For example, you might want to have a tag to indicate who is a leader, a greeter, a teacher, or who is in a particular Bible study group. You can quickly find names that have a specific tag, or use tags to track a group's attendance.

Tip: We recommend that you first add names to your database before creating Tags.

In the following example, we have several Tags assigned to our church member Lamar. These Tags help us know more about Lamar so we can know how to serve him while also knowing how we can connect Lamar to a ministry that lets him best exercise his spiritual gifts and abilities.



Tags are how you can organize your Sunday School, Discipleship Groups, Ministry Teams, Spiritual Gifts and more. You can have any number of people assigned to a Tag as well.

Events & Attendance

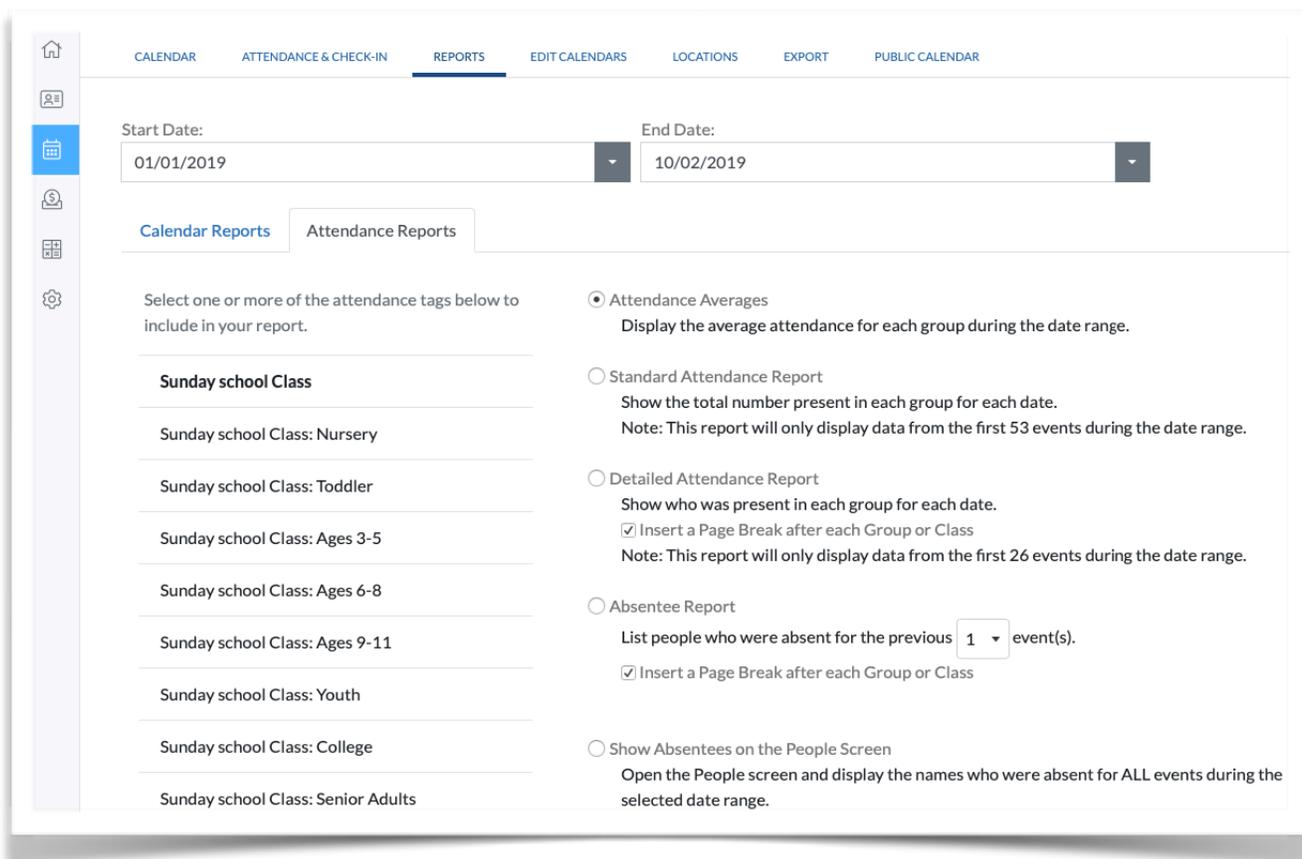
Keeping a good record of your church's attendance is important for multiple reasons. Some of these reasons include:

- Keeping people from slipping through the cracks and disconnected from the body.
- Knowing when someone has been gone for an extended period of time or has become less active enables you to reach out to make sure they are doing well.
- Knowing how many people show up to Sunday school or Bible studies can help you make informed decisions for either changing a group or adding more.
- Ensuring the safety of children through the Child Check-In.

Question #3: Do you track attendance?

ChurchTrac is designed to help all types of churches easily manage their weekly attendance. If you depend on your teachers to keep track of their Sunday School classes or Bible studies, you can easily print out Attendance Role Sheets for them. If you have a designated person that checks each class or service, they can quickly mark attendance in real time right from ChurchTrac.

From the Reports Tab, you can select from a multitude of different reports that give you the information you need. The Absentee Report is one of our most widely used reports as it gives you the ability to quickly identify those people that may need to be reached out to.



Calendar

ChurchTrac allows you to create multiple calendars for managing events. You can also attach people to events, which is useful for volunteer management. You can also configure an event as Public and allow people to register for it (event registration with customizable fields). The Events screen also can manage event locations and display location views (facilities management), and prompt you if multiple events are scheduled for the same location during the same timeframe.

Tip: User accounts can be configured with a permission level that determines which calendars they can view/edit. This enables you delegate the planning of other ministries to those ministry heads.

Locations	Su 19	Mo 20	Tu 21	We 22	Th 23	Fr 24	Sa 25
No Location Specified							
Worship Building	9:30a Worship			6:30p Prayer Se			10a The Real M
Admin Building							
Education Building 1	8a Nursery						
Education Building 2	9a Children's Cf						
Will & Denice's Home							
Classroom #1	8:30a Bible Stuc	6p Homeschool	6:30p Boy Scou				
Classroom #2			7p AA Meeting				
Classroom #3							
Conference Room		8:30a Staff Mee					
Front Field						6p Community	
Annex	9:30a Youth						

In most cases, events require volunteers to help make them happen. With ChurchTrac, you can add Event Participants to each event and send a request to those participants. Say goodbye to endless email chains or phone calls just to schedule your volunteers. Depending on the type of event you're scheduling, you can even add forms directly to the event.

VBS Training
 Mon, Jun 15th, 9:00am - 3:00pm

Event Participants | Event Options | Event Fields

You can add one or more fields to this event. When someone registers for this event or responds to an invitation for this event, they will also be prompted to provide responses for the fields below.

Event Fields	Field Type	Response Required?
<input type="text" value="First Name"/> Add Field Description...	Text Box (small)	Yes
<input type="text" value="Last Name"/> Add Field Description...	Text Box (small)	Yes

This enables you to ask participants questions that pertain to the event. For example, you can create an event for a church dinner and ask participants how many guests they will be bringing. This makes it easier to plan ahead and have a better idea of how many people will be attending your event.

Giving

The Giving Screen allows you to enter contributions for a variety of categories, as well as track pledge campaigns and giving.

Not only does ChurchTrac give you the ability to track and manage your giving, but it can also generate Contribution Statements which can be printed or emailed directly to each member in your congregation.

The screenshot shows the 'REPORTS' section of the ChurchTrac interface. It features a navigation menu with 'CONTRIBUTIONS', 'REPORTS', 'PLEDGES', 'CATEGORIES', and 'ONLINE GIVING'. The 'Start Date' is set to 01/01/2019 and the 'End Date' is set to 12/31/2019. The 'Contribution Statement' section includes a description 'Generate report for tax purposes.', a dropdown menu for 'Print a report for each' set to 'Family', and a field for 'Include contributors who gave a single gift of' set to '0.01'. There are also checkboxes for 'Include Detail Section' (checked) and 'Include Pledge Campaign Summary' (unchecked).

Included with every Standard & Plus plan is ChurchTrac's Online Giving. With Online Giving, your congregation can go to your church's website and donate. Navigate to our online User Guide to learn more.

Accounting

The screenshot shows the 'ACCOUNTS' section of the ChurchTrac interface. It displays the account 'Lincoln Credit Union Checking' with a 'Date Range Displayed' of 'Last 90 Days'. The 'Show' dropdown is set to '50' entries. A search bar is present. Below is a table of transactions:

Date	Ref	Payee	Category	Debit	Credit	Balance
08/18/2019	DEP	Giving Screen Deposit	Multiple Categories		1,482.44	-26,984.58
08/22/2019	ATM	Withdraw Cash for Homeless Family	Benevolence Spending	60.00		-27,044.58
08/25/2019	DEP	Giving Screen Deposit	Multiple Categories		2,610.00	-24,434.58
08/26/2019	1501	Homeless Shelter	Benevolence Spending	50.00		-24,484.58
08/26/2019	1502	Regions Electric Authority	Water and Electricity	213.52		-24,698.10
08/27/2019	ACH	Visa Card Payment	[Transfer To Credit Union Visa]	186.51		-24,884.61
08/29/2019	ACH	Haiti Orphanage	Haiti Orphanage Assistance	250.00		-25,134.61

If you have added the Accounting functionality to your ChurchTrac account, you are able to easily manage your Accounts and Funds directly within the software. With Accounting, you can also print multiple checks in just a few minutes. Because ChurchTrac Accounting is geared primarily towards churches, it gives you functionalities that most accounting softwares don't offer.

ChurchTrac's accounting features are based on the single-entry accounting method. If you require more complex features like double-entry or invoicing, you may need to supplement ChurchTrac with another dedicated accounting application.

Church Connect

Church Connect is a customizable web page for connecting your members, donors and guests. This web page gives your people the ability to do things like:

- Give Online (if enabled)
- View their giving history
- Submit forms, including prayer requests or spiritual decisions
- Register for events
- Mark family members present
- Manage their personal and family profiles

Think of Church Connect as the hub for connecting your church people. You can customize it to fit the specific needs of your ministry by displaying the information that's relevant to people who are logged in or not logged in. Because Church Connect is a web page, it is the perfect supplement to your church's current website. Church Connect is also a great website alternative for ministries that do not have a website! Learn more by going to <https://www.churchtrac.com/support/connect>



Bringing Everything Together

Earlier we said that if ministry was a car, Church Administration could be the key. We still think that's true to an extent. But...Church Administration serves a much bigger role than just being a key.

You are the bridge that lets ministries come together to accomplish the mission of your church.

As you use ChurchTrac to manage your admin needs, we encourage you to include other pastors and leaders, as it will help unify your ministries. ChurchTrac is not just an admin tool, but a powerful platform that will help your leaders do effective ministry! By doing this, you can foster better communication and bring your people together. Not to mention...delegating makes your job of Administration much easier!

For our in-depth guide for all of ChurchTrac's features or to get further support, go to www.churchtrac.com/support.