

ChurchKeeper/ExpenseKeeper Getting Started Guide

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ChurchKeeper

I. Installation/Launching/Logging In Instructions.

ChurchKeeper is available from our website: www.ChurchKeeper.com

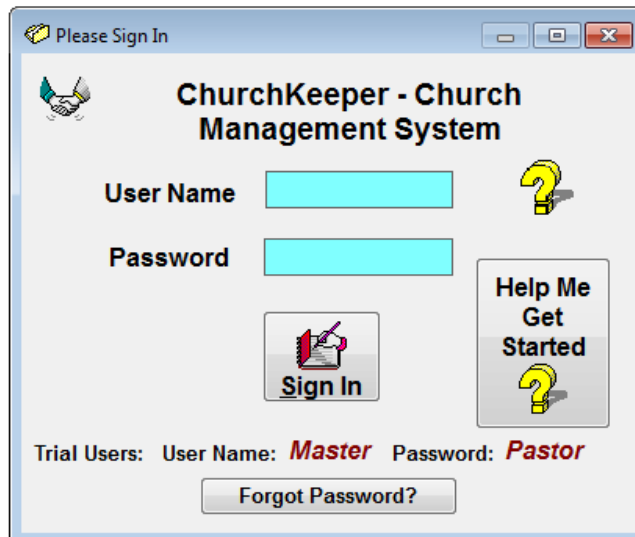
Step 1) Visit our website, and click on the link: Free Trial.

Step2) Download the free trial of ChurchKeeper. You will be prompted for a Username and Password. The Username is **trial** password is **trial** (both lowercase).

Step3) Follow the instructions and install ChurchKeeper on your computer. A shortcut will be placed on your desktop, which can be launched to run ChurchKeeper.



To run ChurchKeeper, click the icon on your desktop. You will be prompted for a User Name and Password: The User Name is **Master** and the Password is **Pastor**.



II. The Main Menu

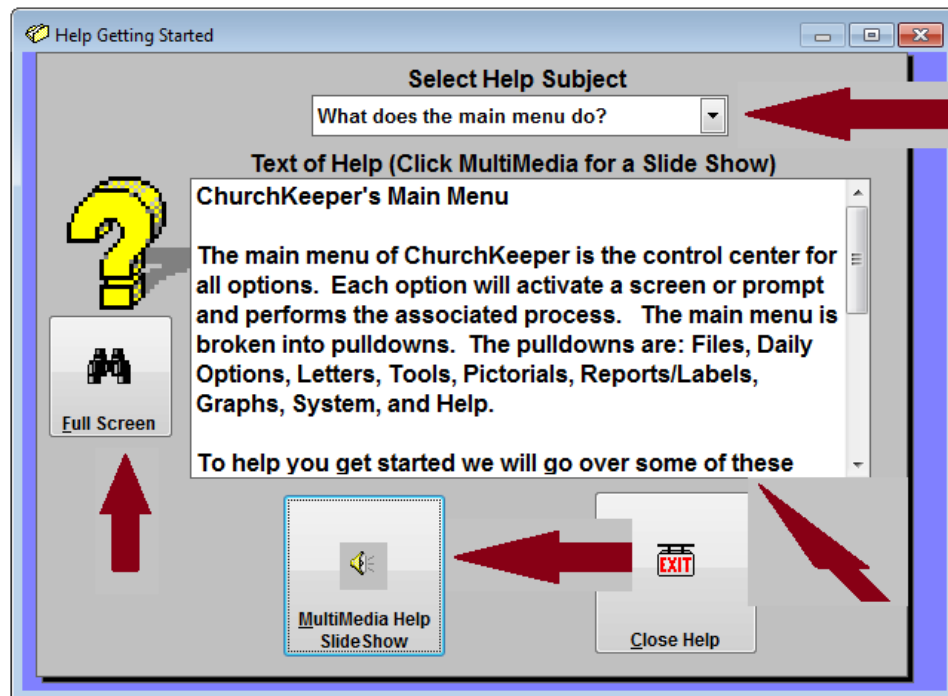
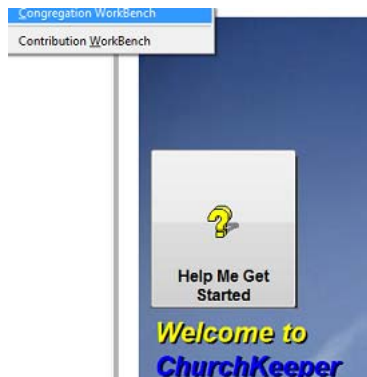
The Main Menu gives each user access to programs and reports within ChurchKeeper. The two most common are the Congregation WorkBench (used for maintaining your membership), and the Contribution WorkBench (used for maintaining contribution activity for your membership and visitors).



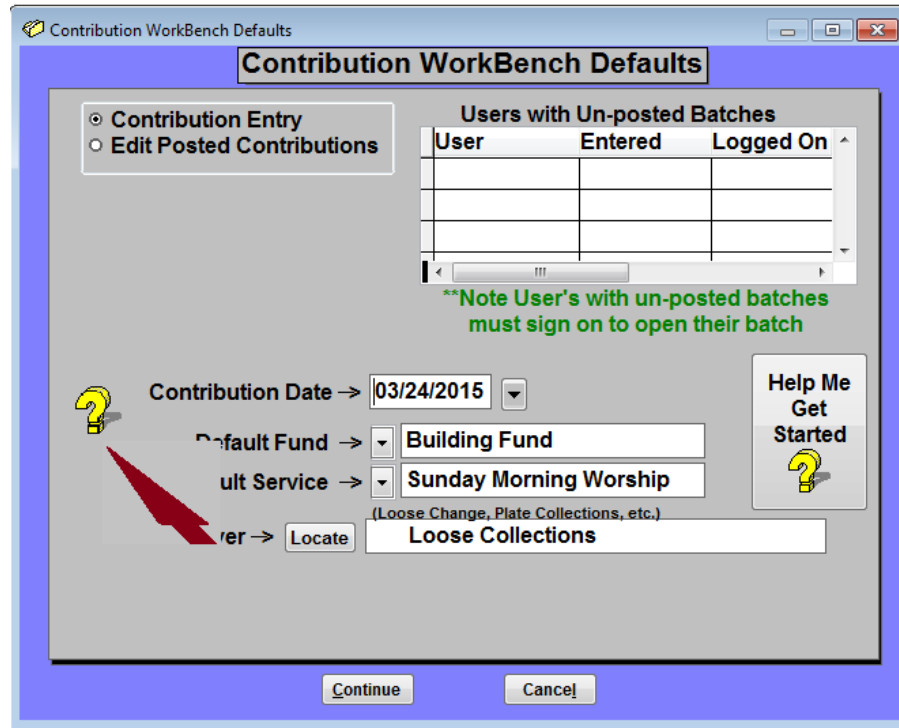
Menu options at the top give access to the appropriate functions in ChurchKeeper. For example: to enter members/visitors use the Congregation WorkBench, and to enter contributions use the Contribution WorkBench.

III. Understanding and Using ChurchKeeper with Integrated Help

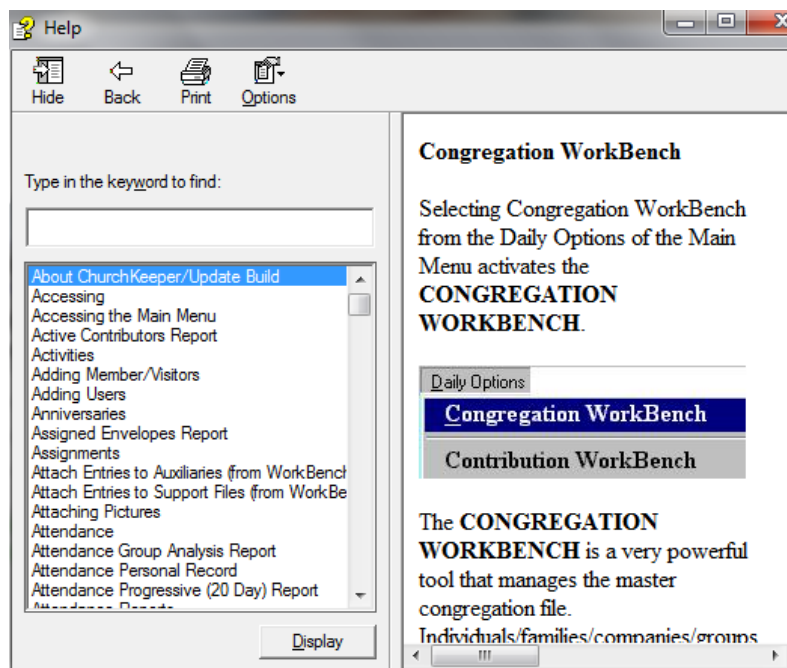
ChurchKeeper has integrated help to assist you in understanding and using the program. To help get started we suggest you use the Help Me Get Started icon on the Main Menu.



Launching this option displays a screen where a topic can be selected and text help is displayed. Clicking the multimedia slide show will activate sound and screens to explain more about each option. Context sensitive help is available on each screen by clicking the question mark.

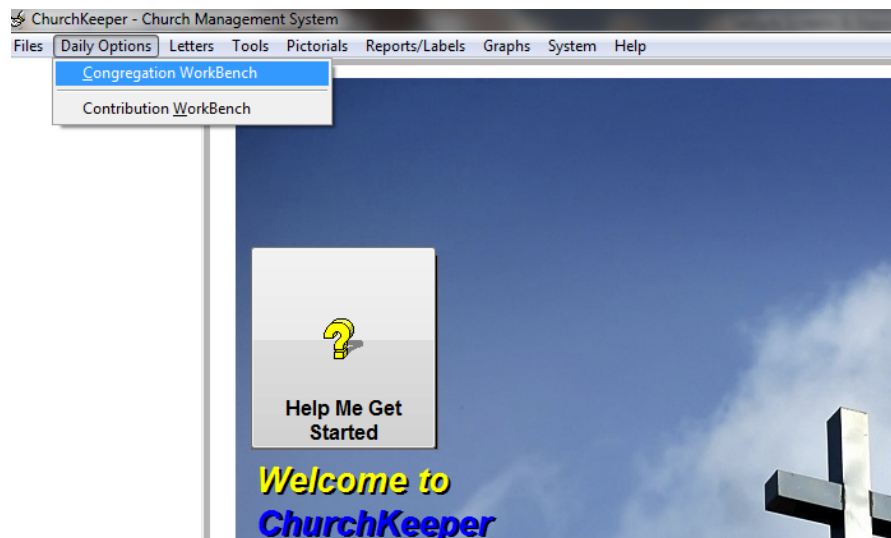


Selecting this option will display help for the topic as follows:

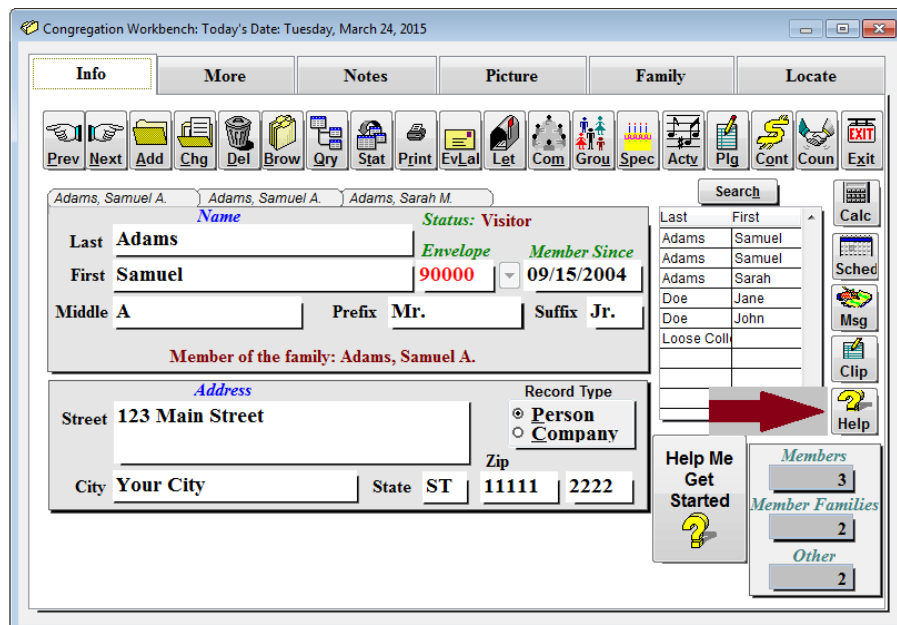


IV. Membership Management.

Membership/Contributions are maintained using the Congregation Workbench from the Main Menu.

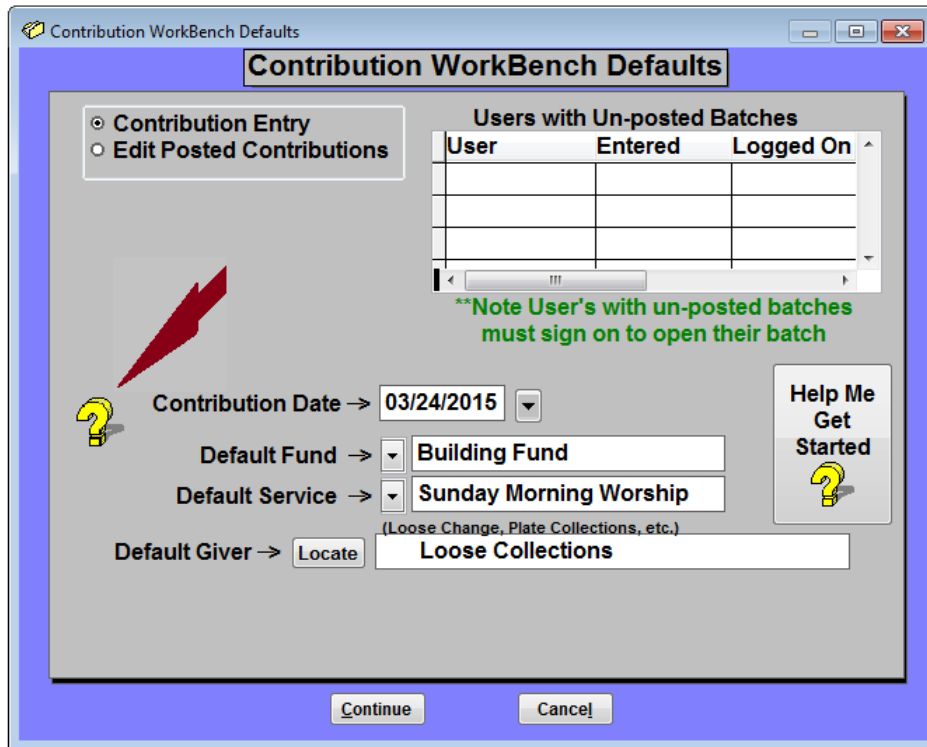


Selecting this option will activate the Congregation WorkBench. The WorkBench is a powerful tool, and has many church building features. Detailed help is available throughout to assist in management of membership.



V. Contribution Management.

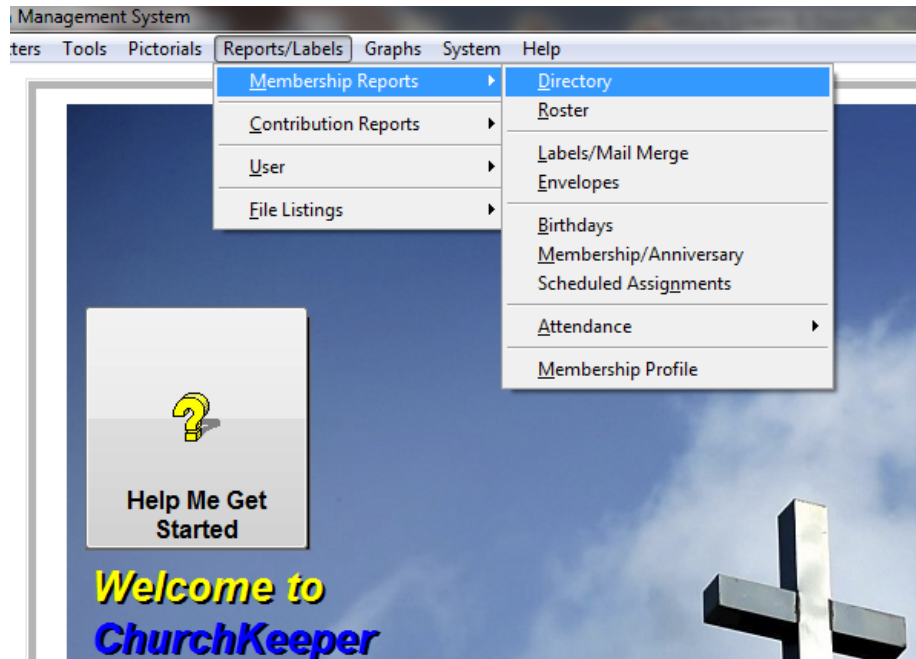
The Contribution WorkBench is designed for ease of use and fast entry of contributions. Once this option is selected from the Main Menu, contributions can be entered for members and visitors.



Detailed help is available throughout to assist in the entry of contributions.

VI. Reports.

High level end user reports are available in ChurchKeeper. These reports related to the management of membership and contributions are available from the Main Menu.



One of the most requested reports are contribution statements. These statements can be generated for all members/visitors or for just an individual. Different options allow for statements to be printed in summary or detail.

ChurchKeeper - Church Management System
 Edit Find

Report Preview - wcontrp1.frx
 100%

test

Go to System/Setup & Enter Your Church

Your Street
 Church City, ST

Contribution Report

For Period: 01/01/2015 to 12/31/2015 Time: 14:26:26
 Date: 03/24/2015

SAMPLE
 Mr. Samuel Adams Jr.
 123 Main Street
 Your City, ST 11111 2222

Page 1

Contribution Detail

Contributor: Mr. Samuel Adams Jr.
 Envelope #: 90000

Date	Fund	Service	Ref #	Amount
03/01/2015	100	Building Fund	Sunday Morning Worship 11:00...	10.00
03/02/2015	100	Building Fund	Sunday Morning Worship 11:00...	20.00
03/05/2015	SAMPLE	Special Improv	Sunday Morning Worship 11:00... test	10.00
03/05/2015	100	Building Fund	Sunday Morning Worship 11:00...	200.00
03/05/2015	TEST2		Sunday Morning Worship 11:00...	100.00
03/07/2015	200	General Fund	Sunday Morning Worship 11:00...	10.00
03/07/2015	100	Building Fund	Sunday Morning Worship 11:00...	10.00
03/08/2015	100	Building Fund	Sunday Morning Worship 11:00...	10.00

ExpenseKeeper

I. Installation Instructions.

ExpenseKeeper is available from our website: www.ExpenseKeeper.com

Step 1) Visit our website, and click on the link: Free Trial.

Step2) Download the free trial of ExpenseKeeper. You will be prompted for a Username and Password. The Username is **trial**, password is **trial** (both lowercase).

Step3) Follow the instructions and install ExpenseKeeper on your computer. A shortcut will be placed on your desktop, which can be launched to run ExpenseKeeper.

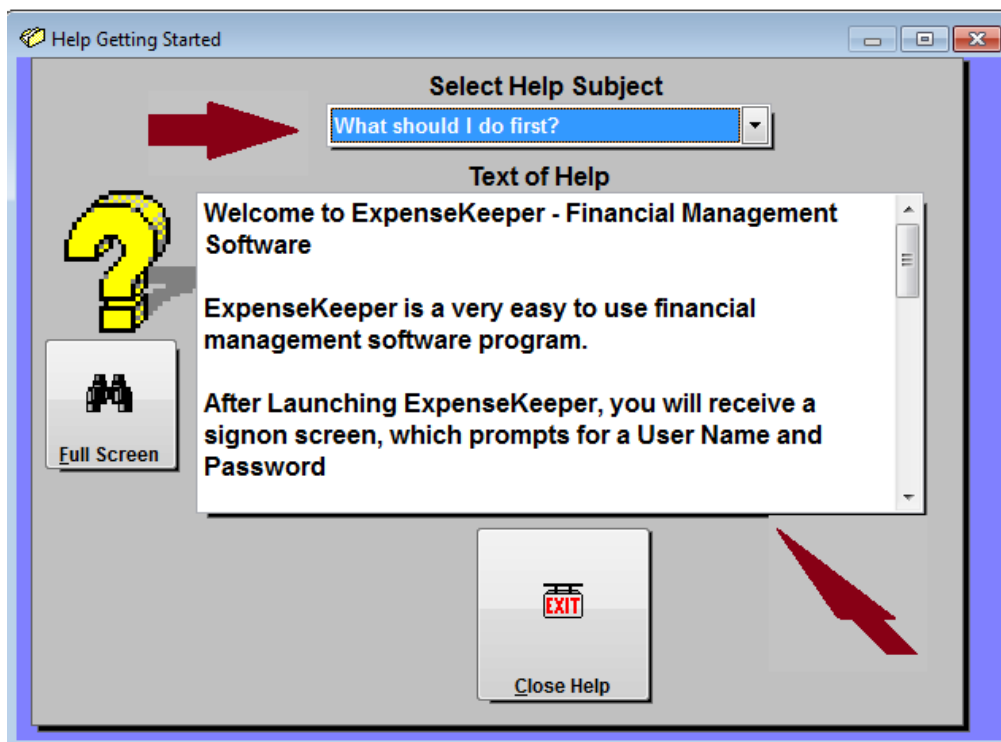


II. Logging in/Using Help.

To run ExpenseKeeper, click the icon on your desktop. You will be prompted for a User Name and Password: The User Name is **Admin** and the Password is **Admin**.

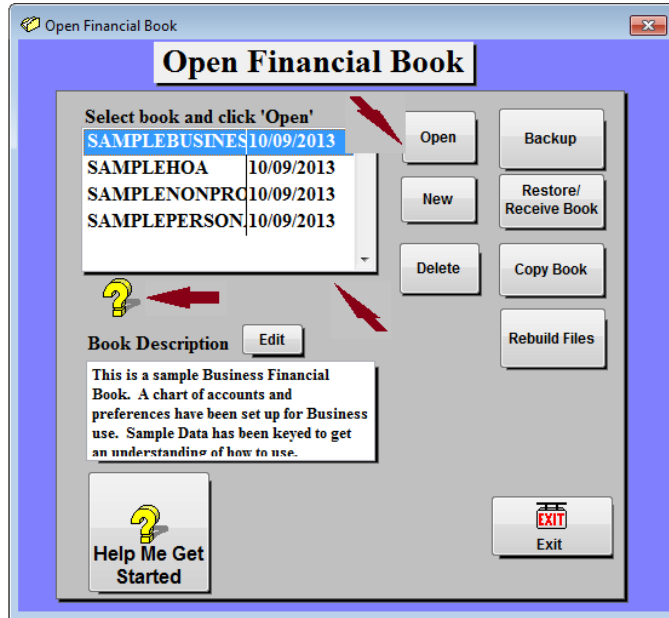


Help is available throughout ExpenseKeeper. The Help Me Get Started provides context sensitive help. Selecting this option activate the getting started help screen.

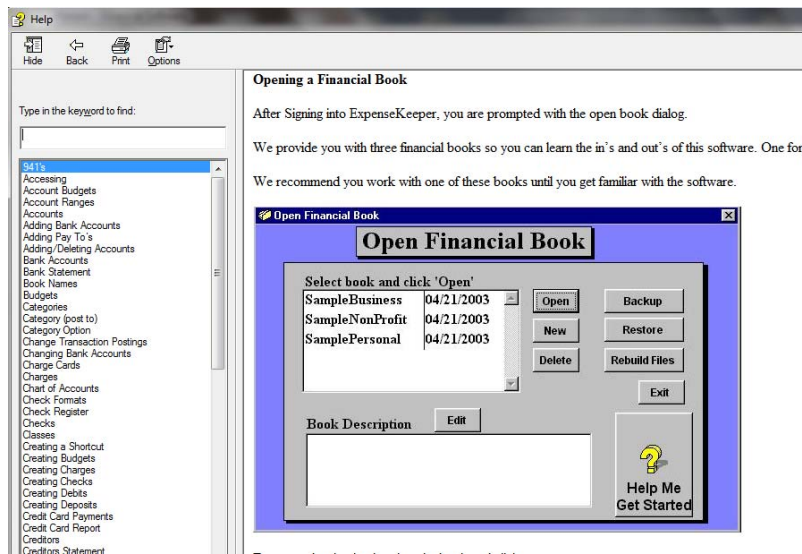


III. Financial Books.

The Financial Book screen is displayed when ExpenseKeeper is launched. Financial books may be created and opened.

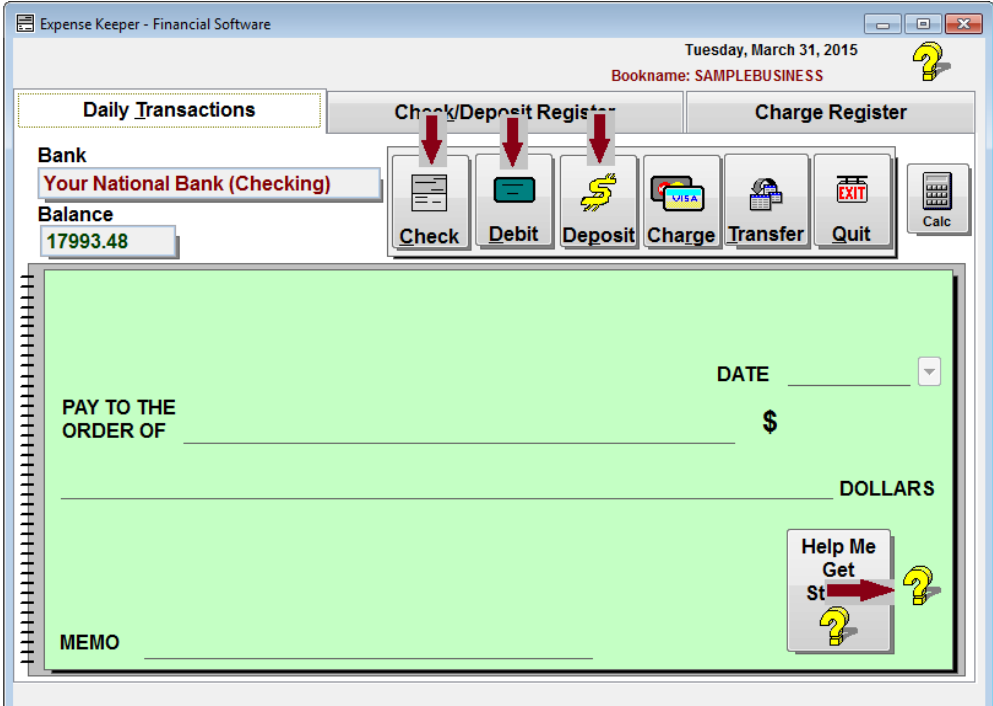


A list of financial books are displayed and can be opened to transact business. Help is available on each screen by clicking the question mark. Sample books are provided to assist in understanding ExpenseKeeper.



IV. Transacting Business.

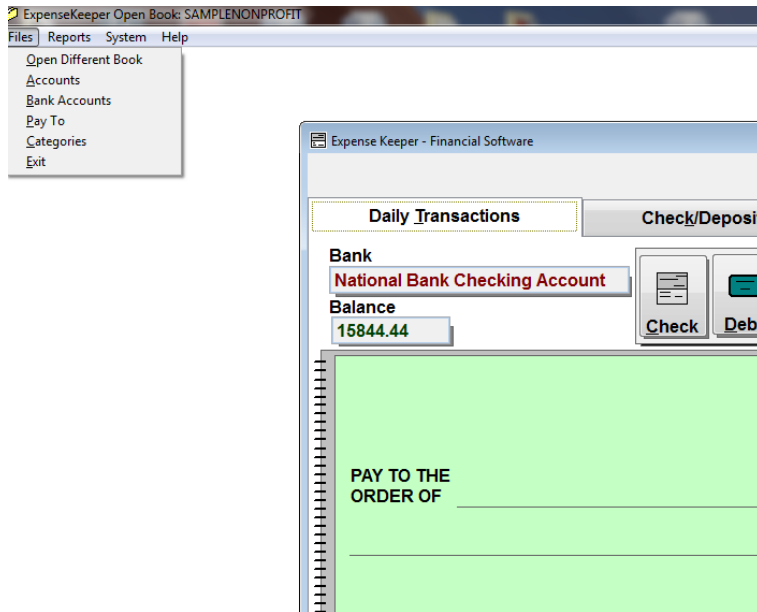
Business is transacted from the Checks prompt. From this screen you are able to write checks, enter debits, deposits, etc.



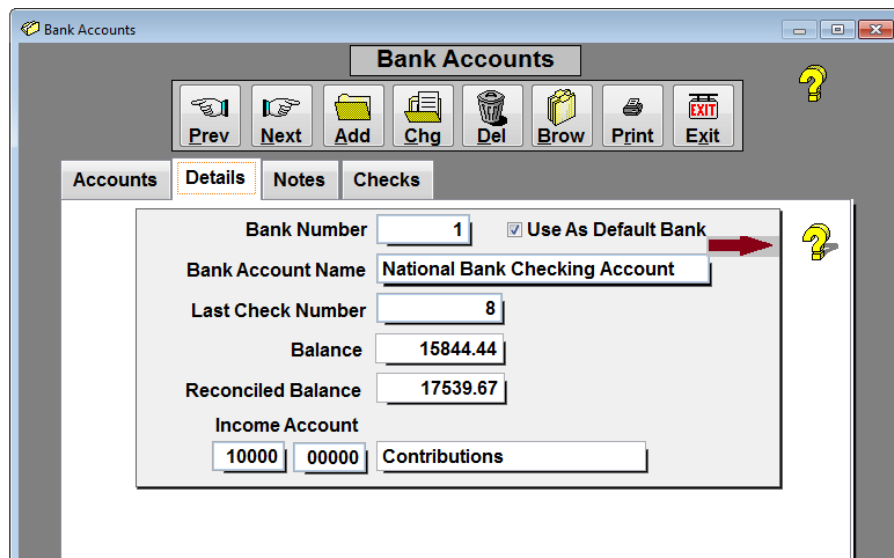
Help is available for each screen by clicking on the question mark.

V. The Main Menu.

The Main Menu gives access to programs and reports within ExpenseKeeper.

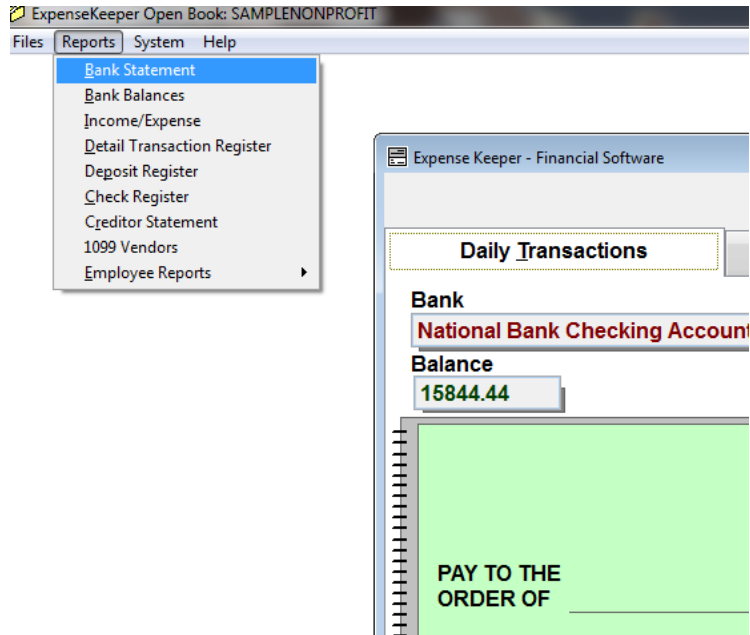


These options can be used to set up bank accounts, a chart of accounts, vendors or pay to, and access reports. Once each option is selected, help is available for that option by clicking on the question mark. For example setting up bank accounts.

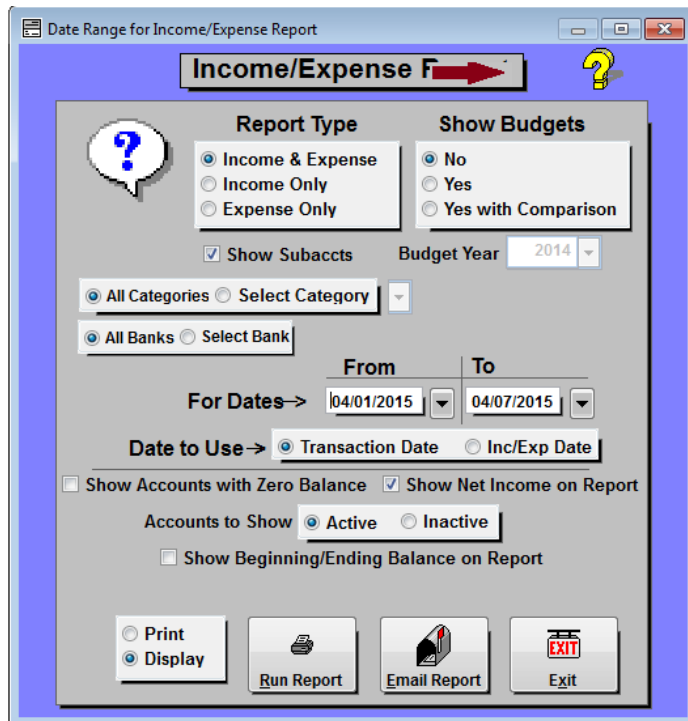


VI. Reports

Reports are available from the Main Menu. Examples are: Income/Expense, Bank Statement, Transaction Register, etc.



Once the option is selected help is available for each report by clicking on the question mark.



Sample Income/Expense Report.

<i>Windmill Church</i>				
Income/Expense Report for Period:				
04/07/2015	01/01/2013 to 04/01/2013		Budget Year 2013	
Based on: Transaction Date				
Account Number	Account Name	Actual Amount	Budget Amount	Comparison to Actual
<i>10000</i>	Contributions	3500.00		3500.00
10100	Tithes & Offerings	1200.00	25000.00	-23800.00
10200	Building Fund	350.00	10000.00	-9650.00
10300	Love Offerings	250.00	2000.00	-1750.00
10400	Missions	290.00	1000.00	-710.00
10500	Other Income	202.00		202.00
<i>10000 Total</i>	<i>Contributions</i>	<i>5792.00</i>	<i>38000.00</i>	<i>-32208.00</i>
Income Total		5792.00	38000.00	-32208.00
<i>60000</i>	Payroll	608.00		-608.00
60200	Office Payroll		10000.00	10000.00
60300	Staff Payroll		5000.00	5000.00
60400	Federal Withholding		750.00	750.00
60500	Social Security		750.00	750.00

How to Order.

ChurchKeeper and ExpenseKeeper can be ordered online via PayPal by clicking on Pricing/How to Order from our website www.ChurchKeeper.com or by calling our offices at 800/673-5204.