



Church Management Software, in Plain English

check-in — in plain English, with no overwhelm An Extended Guide · No. 2091

————— An Extended Guide · No. 2091 —————

Tech Made Simple. Service Made Personal.

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THE 60-SECOND VERSION

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1. The Whole Idea on One Page If you read only one page, read this. Here is the whole idea as a short checklist. Church management software — folks call it a ChMS — is simply a tidy, shared filing cabinet for the things a church keeps track of: who its people are, who gave what, which groups meet, and who signed up for the potluck. It replaces a scatter of spreadsheets and notebooks with one organized place the right people can reach.

- 1 Decide whether you even need one yet — a small church may do fine with a spreadsheet.
- 2 If you do, start with the people directory; that is the heart of any system.
- 3 Add giving tracking next, so year-end statements become easy.
- 4 Add groups, events, and child check-in only as you actually need them.
- 5 Pick a tool whose price and style fit your size — free tiers exist.
- 6 Name one administrator, guard members' privacy, and keep a backup of your data. You do not have to buy everything at once, and many small churches never need the fancy parts. Start with a clean list of people, and add a piece only when a real need appears. The rest of this guide walks through it gently: what a ChMS does, whether yours needs one, the common options and their prices, and how to start small and grow. Take it a page at a time. WHAT IT IS 2. What Church Software Really Is Behind the technical

name, a ChMS is an ordinary idea: a shared, organized place to keep a church's records, reachable by the staff and volunteers who need them. Instead of the directory living in one person's binder and the giving in another's spreadsheet, it all sits in one tidy system that keeps itself consistent. A member directory — names, contact details, families — in one place. A record of giving, so statements and reports are a few clicks, not a week's work. Groups and ministries, with their members and leaders. Events, sign-ups, and often a safe way to check children in and out.

DO YOU NEED ONE

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Think of it as the church's filing cabinet, address book, and giving ledger rolled into one, with the bonus that several trusted people can use it at once without copies getting out of sync. None of this is magic, and none of it is beyond a small church. It is simply a way to keep the ordinary records of church life organized, shared, and safe, so no one person's notebook holds everything. 3. Whether Your Church Needs One Yet Not every church needs a ChMS, and there is no shame in a small one running happily on a spreadsheet and a good memory. The honest question is whether your records have outgrown the simple tools. A few plain signs tell you it may be time, and a few tell you to wait. Signs you may need one: giving is hard to track, statements are a yearly headache, the directory is always out of date. Signs you may need one: several people keep their own separate lists that never agree. Signs you can wait: a small congregation, one person who knows everyone, simple giving. A clean spreadsheet, well kept, serves a small church longer than you might think. WATCH OUT Do not buy software to feel modern. Buy it when a real pain — lost records, a yearly statement scramble, lists that never match — is costing you time and worry. Solve the pain, not the fashion. Being honest about whether you need one saves money and effort. If a spreadsheet still serves you well, keep it. When the records truly outgrow it, a ChMS is there and ready. WHAT IT DOES 4. The Jobs a ChMS Can Do A full ChMS can do a great deal, which is both its strength and its trap — it is easy to be overwhelmed by features you will never use. It helps to see the main jobs laid out, so you can pick the two or three that solve your real problems and ignore the rest for now.

START SMALL

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People: a shared directory of members and families, always current.

Giving: recording donations and producing statements and reports. Groups: ministries, small groups, and classes with their members. Events and sign-ups: registrations, volunteers, and attendance. Child check-in: a safe, printed-tag way to check children in and out. Communication: built-in email and texting to members and groups. No small church uses every feature. The art is choosing the few that matter to you — usually people and giving first — and leaving the rest switched off until you genuinely want them. Seeing the whole menu helps you order wisely. You do not have to eat everything; pick what nourishes your church now, and come back for more when you are hungry for it.

5. Starting With One Piece The surest way to succeed with church software is to start small. A church that tries to switch everything at once often ends up overwhelmed, with half-finished records and frustrated volunteers. Begin with the single piece that solves your biggest pain, get it working well, and only then add the next. Pick the one area that hurts most — usually the people directory or giving. Get that one piece clean and working before touching anything else. Let your volunteers grow comfortable with it before you add more. Add the next piece only when the first is running smoothly. **TIP** A church that masters its people directory and nothing else is far better off than one that half-set-up six features and trusts none of them. Slow and solid beats fast and shaky. Starting small is not timid; it is wise. Each piece you add on a firm foundation strengthens the whole, where piling everything on at once tends to topple.

THE PEOPLE

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6. The People Directory, the Heart of It Every ChMS is built around its people. The directory holds your members and their families, their contact details, and how they connect to the life of the church. Getting this right first matters most, because almost everything else — giving, groups, check-in — hangs off who your people are. Names, contact details, and family links, all in one shared place. A note of each person's groups, roles, and involvement. Updated once and current for everyone, instead of a dozen stale copies. Searchable, so finding a member's number takes a moment, not a hunt. A clean, current directory is the single most useful thing a small church gains from software. Half the daily frustrations — wrong numbers, missed families — simply vanish when there is one list everyone trusts. Invest your first effort here. A well-kept people directory repays you every single week, and it is the foundation the rest of the system is built upon. GIVING 7. Tracking Giving and Statements For most churches, the second great gift of a ChMS is giving. Recording each gift against the right person means that reports and year-end statements, which can otherwise swallow a week of someone's January, become a matter of a few clicks. It also helps you thank and care for your givers well. Record each gift against the member who gave it, by whatever method. Produce year-end giving statements in a batch, rather than by hand. See helpful, private summaries of giving for planning and stewardship. Tie online giving in, so those gifts record themselves automatically. The year-end statement alone wins many churches over to software. What was a dreaded weekend of spreadsheets and mail-merges becomes an afternoon's gentle work — a full guide to those statements exists separately.

GROUPS

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Giving records handled well save enormous time and serve your givers better. If statements are your yearly headache, this is the feature that pays for the whole system. 8. Ministries, Classes and Small Groups Churches run on groups — the choir, the youth, the Tuesday Bible study, the trustees. A ChMS lets you organize members into these groups, so leaders can see who is in theirs, reach them easily, and track who comes. It turns a tangle of separate lists into one connected picture. Make a group for each ministry, class, or committee. See at a glance who belongs to each, with leaders assigned. Let group leaders message their own members without seeing the whole church. Track attendance gently, where it helps you care for people. TIP Groups are where a ChMS helps you notice the quiet soul who has stopped coming. Gentle attendance tracking is not about policing; it is about caring enough to reach out before someone drifts away. Organizing your groups in one system lets leaders serve their people well and keeps the whole church connected. It is often the third piece a church adds, once people and giving are solid. EVENTS 9. Events and Sign-Ups From the fall festival to the men's breakfast, churches run events, and a ChMS can handle the registrations, volunteer sign-ups, and head counts that go with them. This keeps the details out of scattered emails and clipboards and tied to the people you already know in the system. Set up a sign-up for an event, with a head count and any details you need. Let members register themselves online, tied to their directory record. Gather volunteers for a work day or a roster in one place. See who is coming, so you can plan food, rides, and space.

CHILD CHECK-IN

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If events are a big part of your church life, this feature shines. If they are rare, a free sign-up tool may serve you just as well without adding to your ChMS — use what fits. Event handling is a convenience more than a necessity for many churches. Add it when your events genuinely need more than a clipboard, and leave it aside when they do not.

10. Safe Check-In for Children For churches with children's programs, check-in is one of the most valued features of all, because it touches on safety. A check-in system prints a tag for the child and a matching one for the parent, so a child is only released to the right adult. This gives families real peace of mind. A child and parent get matching tags at drop-off. A child is only released to the adult with the matching tag. A record of who was present, which matters for safety and care. Allergy or special-need notes travel with the child's tag to the volunteers. Safe check-in is the feature that often justifies a system for a church with an active children's ministry. The security it gives parents — and the volunteers — is worth a great deal. If you have children in your care, a proper check-in system is one of the most worthwhile things software offers. It turns a vulnerable moment into a safe, orderly one, week after week.

11. Email and Texting Built In Many ChMS tools include email and texting, so you can reach the whole church or a single group straight from the same place your people live. This saves juggling a separate mailing tool and keeps your communication tied to your always-current directory. Email the whole church or a single group from within the system. Send texts for timely news, where the tool supports it. Because it uses your directory, your lists stay current automatically.

TIP

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Members' contact details stay private, managed by the system.

If your ChMS does texting and email well, you may not need a separate tool for them. But if it does not, pairing a dedicated texting tool with your ChMS is perfectly fine — use the best of each. Built-in communication is a convenience that keeps everything in one place.

Whether you lean on it or keep a separate tool depends on how well your chosen ChMS does the job. THE OPTIONS 12. The Common Choices Overview A handful of tools dominate the small-church world, and knowing them by name helps you shop. They differ mainly in how they are priced and how they are shaped — some modular, some flat-rate, some giving-focused. The next pages take the main ones in turn. Planning Center: modular — you pick and pay for the pieces you use; generous free tiers. Breeze: a simpler, flat-rate system popular with smaller churches. Tithe.ly: giving-first, with church management added on. Others exist, and some denominations offer their own systems. Prices and plans change often, so treat any figure here as a rough guide and check each tool's own site before deciding. All of the main ones let you try before you commit. You do not need to survey the whole field. Look closely at one or two that fit your size and style, try them, and choose the one your volunteers find friendliest. The next pages help you narrow it down. PLANNING CENTER 13. Planning Center, Piece by Piece Planning Center is built in modules — People, Giving, Groups, Check-Ins, and more — and you pay only for the ones you turn on. Its People module and its member app have historically had free tiers, which makes it a gentle, low-cost way to start with just a directory and grow from there. Modular: start free with People, add paid modules as you need them.

BREEZE

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Each paid module is priced on its own, so you pay only for what you use.

A member-facing app lets your people see groups, give, and sign up. Paid modules have historically started modestly per module — check current pricing. Planning Center's pay-for-what-you-use shape suits a church that wants to start with a free directory and add giving or check-in later, one piece at a time, as the budget allows. If you like the idea of starting free and growing gradually, paying only for the pieces you actually switch on, Planning Center is a natural fit worth a close look.

14. Breeze, Simple and Flat-Rate

Breeze is known for being friendly and simple, with one flat monthly price that includes its features rather than charging module by module. Many smaller churches love it for exactly that: you know what you pay, and you get the whole tool, with a reputation for being easy to learn. One flat monthly price, with the features included rather than added on. A reputation for being especially easy for volunteers to learn. Covers people, giving, events, and more in the one plan. Predictable cost, which smaller churches on a fixed budget appreciate. Breeze's flat price has historically sat in a modest monthly range for a small church; the figure changes, so check breezechms.com for current pricing before you decide. If you prefer a single, predictable price and a tool prized for being easy on volunteers, Breeze is a strong candidate. Simplicity is its selling point, and for many small churches that is exactly right.

TITHELY & OTHERS

15. Tithe.ly and Other Choices

Tithe.ly began as an online-giving tool and grew to add church management, so it may appeal if giving is your first priority. Beyond these, denominations and other vendors offer their own systems, and it is worth asking whether your denomination provides or recommends one before you shop widely.

TIP

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Tithe.ly: giving-first, with free giving and paid management bundles added on.

Some denominations provide or recommend a system to their churches. Other vendors serve particular sizes or styles of church. Ask around locally — a neighboring church's experience is worth a great deal. Before signing up anywhere, ask whether your denomination offers or subsidizes a system. Some do, and it can save money and give you a built-in source of help from others using the same tool. The field is wide, and the right answer often comes from asking neighbors and your denomination as much as from comparing feature lists. A tool others near you already use is a tool you can get help with.

OR A SPREADSHEET 16. When a Spreadsheet Is Enough It is worth saying plainly: a small church may not need any of this. A well-organized spreadsheet, kept by one careful person, can hold a directory and a giving record perfectly well. Software earns its place when the spreadsheet starts to strain — many people editing, giving statements by the hundred, check-in safety. A single shared spreadsheet can serve a small church's directory and giving. It is free, familiar, and needs no new learning. It strains when many people must edit it, or when statements grow numerous. It cannot do safe child check-in, which is where software clearly wins. There is no prize for having software you do not need. If a shared spreadsheet keeps your church organized and your statements manageable, it is a perfectly honorable choice. Start where you are. If a spreadsheet serves, keep it until it does not. When the strain is real, a ChMS is waiting — but let a true need, not a feeling of falling behind, be what moves you.

WHICH TO CHOOSE

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17. Matching a Tool to Your Church With a few good options, a simple rule of thumb helps. Match the tool to your size, your budget's shape, and the piece you most need, and you will land close to the right choice without an endless comparison. Want to start free and grow piece by piece: Planning Center. Want one simple, flat, predictable price: Breeze. Giving is your first and biggest need: Tithe.ly. Very small and simple: a shared spreadsheet may still be the honest answer. TIP Try before you buy. The main tools all let you test them, so sign up for a trial, put a few real members in, and see which your volunteers find friendliest. Comfort matters more than feature counts. The best tool is the one your people will actually use. Narrow it to one or two, try them with real data, and let your volunteers' comfort guide the final choice. THE COST 18. What It Honestly Costs Church software ranges from free to a modest monthly sum for a small church, depending on which tool and how many features you turn on. It is worth understanding the shapes of pricing so you can budget honestly and avoid surprises as you add pieces. Some tools start free for a basic directory, with paid pieces added on. Flat-rate tools charge one predictable monthly price for the whole thing. Costs generally rise with the size of your congregation and the features used. Online giving often carries its own small per-gift processing fee on top. Because pricing changes and varies by size, check each tool's own site for current figures. Budget for the tool and, separately, for the small processing fee on any online giving you accept. For most small churches the cost is modest and predictable, especially if you start with a free or basic tier and add only what you need. Let the value guide the spending, piece by piece.

MOVING DATA IN

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19. Getting Your Records In Starting a ChMS means getting your existing records into it, and this is often the biggest single task. The good news is that tools are built to import a spreadsheet of members, so your years of records can usually come along rather than being retyped. A little care here saves a lot of cleanup later.

- 1 Gather your current records into one clean spreadsheet first.
- 2 Tidy it up — fix duplicates, correct obvious errors — before importing.

- 3 Use the tool's import feature to bring the spreadsheet in.
 - 4 Check a sample of records after importing to be sure everything landed right. TIP Clean the spreadsheet before you import it, not after. It is far easier to fix duplicates and typos in one familiar list than to hunt them down scattered through a new system. A careful import gets you off to a strong start with trustworthy records. Spend the time to tidy your data first, and the new system begins its life clean rather than inheriting old messes.
- WHO RUNS IT 20. Naming an Administrator A ChMS needs one person who owns it — an administrator who keeps it tidy, adds new members, and helps others use it. This need not be a staff member; a capable, detail-minded volunteer often makes an excellent administrator. What matters is that one person feels responsible, so the system stays trustworthy. Name one administrator — staff or a reliable volunteer. They keep records current, add new people, and help others use the tool. They manage who else has access and what each person may see. When they step down, the role and the keys pass cleanly to the next person. The administrator role suits a detail-minded volunteer who loves order. It is real, valued service, much of it doable from home, and it keeps the whole system dependable for everyone else.

ACCESS**14. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

One clear owner is the difference between a system people trust and one that drifts into disarray. Name your administrator early, and give them your thanks — it is quiet but vital work. 21. Who Can See and Do What A ChMS holds sensitive things — giving records, personal details — so not everyone should see everything. Good tools let you set roles, so a group leader sees only their group, the treasurer sees giving, and the pastor sees more. Setting these thoughtfully protects members and keeps the system trustworthy. Give each person only the access their role genuinely needs. Keep giving records visible only to those who must see them. Let group leaders see their own group, not the whole church's data. Review who has access once a year and trim anyone who has stepped down. **WATCH OUT** Giving records are especially sensitive. Keep them visible only to the treasurer and pastor, or whoever truly needs them. A member's giving is private, and treating it so keeps their trust. Thoughtful access settings are a kindness to your members and a protection for the church. Give people what their role needs and no more, and the system stays both useful and safe. **PRIVACY** 22. Caring for Members' Information A church directory and giving record are a sacred trust. Members share their details expecting them to be used for the church's care, not passed around or exposed. Handling that data with care — guarding it, sharing it narrowly, and never selling or leaking it — is both a duty and a way of honoring your people. Use members' details only for the church's own care and communication. Never sell, trade, or hand the directory to outside parties. Keep the system behind strong passwords and limited access. Ask before publishing anyone's details in a shared or public directory.

WATCH OUT

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A leaked church directory can expose members to scammers who prey on congregations.

Guard it as you would your own family's information, because to your members, that is exactly what it is. Treating member data with reverence keeps the trust that lets people share it in the first place. A church that guards its directory well is a church its people feel safe belonging to. STATEMENTS 23. Year-End Giving Statements One of the clearest payoffs of tracking giving in a ChMS arrives each January, when year-end giving statements are due to donors. What can be a dreaded weekend of spreadsheets and mail-merges becomes, with the records already in the system, a batch you generate and send in an afternoon. Because gifts are recorded all year, statements are ready to generate at year-end. Produce them in a batch rather than one painful letter at a time. Send them by email or print them, as your donors prefer. Accurate statements help your donors and reflect well on the church. The relief of easy year-end statements wins many a treasurer over to software all by itself. A separate guide walks through getting those statements right, whichever tool you use. If the yearly statement scramble is your church's pain point, the giving records in a ChMS are the cure. Record faithfully through the year, and January loses its dread. SAFETY 24. Check-In and Child Safety For churches with children, the safety side of a ChMS deserves its own careful thought. Beyond the matching tags at check-in, a good system keeps a record of who was present and in whose care, supports background-check tracking for volunteers, and notes allergies or needs. These are not mere conveniences; they protect the most vulnerable in your care. Matching tags ensure a child goes home only with the right adult. A record of attendance and care supports your safety policies. Some tools track volunteer background checks and training.

ON PHONES

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Allergy and special-need notes reach the volunteers who need them.

Child-safety features can lower your risk and raise parents' confidence at once. For an active children's ministry, they are among the most valuable things software provides. If children are in your care, lean into the safety features. They turn software from a convenience into a genuine safeguard, protecting both the children and the church that loves them.

25. The Member App Many systems offer a member-facing app or web page, so your people can see the directory, join groups, sign up for events, and give — all from their own phone. This shifts work off the office and lets members keep their own details current, which keeps your records cleaner with less effort. Members can look up the directory and reach one another, where allowed. They can join groups, sign up for events, and give from their phone. They can update their own contact details, keeping records current. It gives the congregation a friendly front door into the church's life.

TIP Letting members update their own details is a quiet gift to your administrator: the directory keeps itself current as people move and change numbers, with no chasing required. A member app turns the system from a back-office tool into something the whole congregation touches. Used well, it lightens the office's load and draws members more fully into church life.

LEARNING IT 26. Learning It Without the Overwhelm New software can feel daunting, but it need not be. The tools are built for ordinary volunteers, and the key is to go slow — learn the one piece you started with, lean on the tool's own help and videos, and grow your skill as you grow your use. No one has to master it all at once.

NOT LOCKED IN

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Learn only the piece you are using first; ignore the rest until you need it.

Use the tool's built-in help, guides, and videos — they are made for beginners. Let your administrator learn first, then teach a couple of others. Give yourselves grace; comfort comes with a few weeks of ordinary use. Every church that uses software today started out unsure of it. The tools are far friendlier than they look, and a little patience in the first weeks turns into easy confidence before long. Going gently is the whole secret to learning. One piece at a time, with the tool's own help close at hand, and before long the system feels like second nature to your volunteers.

27. Keeping Your Data Yours Before you pour years of records into any system, make sure you can get them back out. Reputable tools let you export your data, so you are never truly trapped and can move to another tool or keep a backup. This freedom is worth checking before you commit, not after.

- 1 Confirm, before signing up, that the tool lets you export your data.
 - 2 Once set up, do a test export so you know how it works.
 - 3 Keep a periodic backup of your records somewhere safe.
 - 4 If you ever switch tools, your exported data can usually move with you. WATCH OUT Avoid any system that makes it hard to get your own data back out. Your records are yours; a tool that holds them hostage is not one to trust with your church's life. Knowing you can always leave makes it safe to commit. Check the export, keep a backup, and your church's records stay firmly your own, whatever tool you choose to hold them.
- SECURITY 28. Keeping the System Secure Because a ChMS holds sensitive records, a little security care is essential. Strong, unique passwords for everyone with access, and an extra verification step on the administrator's account, keep the system safe from the kind of break-in that could expose your whole directory.

WATCH OUT**18. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

Give each user their own strong, unique password — never a shared one.

Turn on two-step verification, especially for the administrator. Remove access promptly when a volunteer or staff member leaves. Keep the whole thing under the group's control, not one person's private login. A shared password taped to the office computer undoes all the system's protections. Give each person their own login, add a verification step for the administrator, and your records stay safe. Good security is not complicated: unique passwords, a verification step on the key account, and prompt removal when people leave. Those few habits keep your members' trust well protected. COMMON MISTAKES 29. The Mistakes Churches Make Most trouble with church software comes from a few avoidable missteps. Knowing them in advance keeps your rollout smooth and your system trusted. None is hard to avoid; each is simply a trap to sidestep. Buying every feature at once and overwhelming the volunteers. Importing messy data, so the new system starts out untrustworthy. Letting everyone see the giving records, breaking members' privacy. Having no named administrator, so the system drifts into disorder. Choosing a tool you cannot export your data from, and getting stuck. TIP Run a simple test: start with one clean piece, one owner, and tight access to giving. Get that right, and you have avoided the four biggest mistakes before you even begin to grow. Sidestep these five, start small and clean, and the rest comes naturally. Church software is not hard to succeed with; it just rewards patience, order, and care for members' privacy.

COMMON QUESTIONS

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30. Answers to Common Questions A few questions come up again and again when a church considers software. Here are short, honest answers to the ones heard most. 'Do we really need it?' Only if a spreadsheet is straining — small churches often do not yet. 'Is any of it free?' Yes — some tools have free tiers for a basic directory. 'Will volunteers manage it?' Yes, these tools are built for ordinary volunteers to run. 'Can we get our data back?' With a reputable tool, yes — always check before committing. 'Where do we start?' With the people directory, then giving — one piece at a time.' If choosing between tools feels overwhelming, that is normal. Narrowing to one or two, trying them with real data, and asking a neighboring church about theirs usually makes the choice clear. Most worries about church software ease once you start small and see how friendly the tools are. If a question is holding you back, it is the kind of thing worth talking through before you commit.

GETTING STARTED 31. Getting Your Church Started You now know the whole shape of it: decide if you truly need one, start with the people directory, add giving and the rest only as needed, guard privacy, and keep your data yours. The best time to sort this out is before the next year-end statement scramble or lost-records headache.

- 1 First: be honest about whether a spreadsheet still serves, or a real pain calls for software.
- 2 If you need one, try one or two tools that fit your size with a few real members.
- 3 Start with a clean people directory, then add giving.
- 4 Name an administrator, set access carefully, and guard members' privacy.
- 5 Confirm you can export your data, and keep a periodic backup. You do not have to remember all of it. You just have to remember you can call. Friendly, in-person help for churches and nonprofits — I come to you. (330) 200-8042.

BILL'S HERE TO HELP**20. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

Church software, chosen wisely and started small, can lift a real weight off your office and serve your people better. Take it one piece at a time, and let each step prove its worth before the next. 32. You Don't Have to Sort It Out Alone If weighing the options, cleaning up your records, or getting a system set up feels like more than you want to take on, that is exactly the kind of thing I help local churches with. There is no silly question, and I am glad to sit down with your leaders and help you choose and start without the overwhelm. I can help you decide whether you even need a system, compare a couple that fit your size, tidy and import your existing records, set up access so giving stays private, and train your administrator. Then I leave you with it working and a simple cheat sheet, so your church owns it for good. Friendly, in-person tech help for churches and nonprofits around Portage County. I come to you. If you are not happy with a visit, I will make it right. (330) 200-8042. Whether you set it up yourself with this guide or give me a call, the goal is the same: records your church can trust, kept safely and simply, so your people can get on with the work that really matters.

CHEAT SHEET**21. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

Everyday Cheat Sheet Keep this page handy. It points you straight to what to do for each task. I want to... Do this Decide if you need one A tidy spreadsheet may still serve a small church well Start with people A clean, shared member directory is the heart of any system Add giving next Record gifts all year so statements take an afternoon, not a weekend Add the rest as needed Groups, events, and child check-in only when a real need appears Pick for your size Planning Center (modular, free tiers), Breeze (flat-rate), Tithe.ly (giving-first) Protect privacy Keep giving records and the directory to those who truly need them Name an administrator One owner keeps records clean and manages who sees what Keep your data yours Confirm you can export, and keep a periodic backup Get help Call Bill: (330) 200-8042

HOW I CAN HELP

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Your Visit — and My Promise In-home visit — \$99 flat for your first visit. No contracts and no surprise charges, and a 30-day follow-up is included. Remote Support — \$49 for a screen-share session. I only connect with your permission, you watch the whole time, and you can end anytime. If I can't fix it over the screen-share, I refund the \$49 — and if it turns out you need me in person, that \$49 goes toward your visit. It's included free for Support Plan members (\$39/mo). My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated. Call or text (330) 200-8042 · Book a visit: billshometech.com/book · bill@billshometech.com This free guide is for general information only — not professional advice, and no substitute for your device's own manual. Any prices or outside products mentioned can change; please confirm current details before you buy. Please use your own good judgment and follow it at your own risk — for anything involving electricity, gas, water, or heights, stop and call a licensed professional. Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results. © 2026 Bill's Home Tech, LLC.

AT A GLANCE

A Picture to Follow Along

What a Church System Holds

One tidy place for the things a church keeps track of.

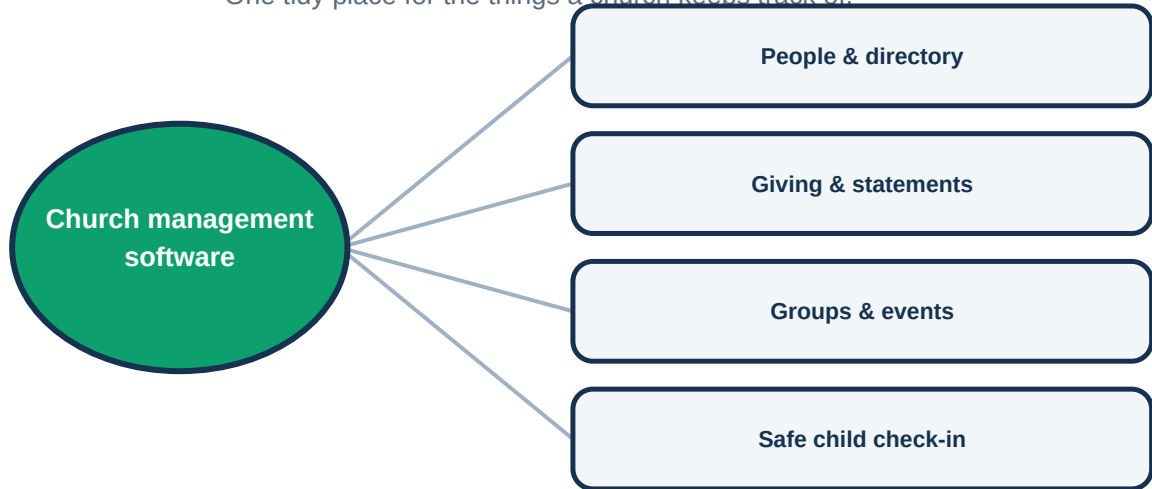


Illustration — a schematic. Set-up screens differ; each takes only a few minutes.

AT A GLANCE

A Second Look

Starting Small and Growing

Don't buy everything at once — add pieces as you need them.



Illustration — a schematic. The order is a suggestion; do one box at a time.

A schematic of the plan — company steps vary; the order does not have to.

BEFORE YOU GO

A Note From Bill

A quick note from Bill. I write these guides to make home tech a little less frustrating, and I do my best to keep every step accurate and up to date. Still, every home, device, and setup is a bit different, so I can't promise a guide will match yours exactly or fix your particular problem. These guides are for general information only — they're not professional, legal, or financial advice, and they don't replace your device's own manual or the manufacturer's instructions. Please go slow, use your own good judgment, and use everything here at your own risk. If a step involves electrical wiring, a gas appliance, a water heater, plumbing, or climbing a ladder — or if anything just doesn't feel safe — please stop and call a licensed professional (or give me a call at 330-200-8042). Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results.



HOW I CAN HELP

Your Visit — and My Promise

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Remote Support — \$49 for a screen-share session. I only connect with your permission, you watch the whole time, and you can end anytime. If I can't fix it over the screen-share, I refund the \$49 — and if it turns out you need me in person, that \$49 goes toward your visit. It's included free for Support Plan members (\$39/mo).

GOOD TO KNOW

My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated.

Call or text **(330) 200-8042** · Book a visit: **billshometech.com/book** · **bill@billshometech.com**

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