# ChurchWatch

CHURCH MANAGEMENT SOFTWARE FOR WINDOWS®

White Mountain Software

# USER GUIDE

# ChurchWatch Version 5 User's Guide

Second Edition
November 9, 2008

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This manual uses American spelling.

Printed in Canada

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# WHAT'S NEW IN VERSION 5?

**(Items are listed in random order)**

## NEW FEATURES AND IMPROVEMENTS:

- **MAJOR FEATURE! Brand new graphical, calendar based, Scheduling Manager to manage events, classes, visits, facilities, resources, staff, volunteers, attendance and meeting minutes.**
- Ability to synchronize the church calendars with your PDA or Pocket PC.
- Extremely fast conflict checking tells you when there is a scheduling conflict.
- All known limitations removed in the Scheduling Manager.
- Ability to manually add event/class occurrences for cases where the recurring pattern does not fit the pre-defined rules.
- Data can be modified for an event occurrence or for the entire series.
- Each occurrence of an event or class can now have different requirements in terms of people, facilities and resources.
- Many different sizes of calendar reports to chose from to help in cases where all events don't fit in the box for a single day.
- Volunteer and task management options and many reports added.
- **MAJOR FEATURE! Added 2 digit account codes and Rapid Entry Editor (REE) for rapid entry of donations.**
- **MAJOR FEATURE! Giving/Tax Receipt Managers now properly support Gift-In-Kind donations. This is particularly important in Canada for 2009 since the tax receipt rules have changed.**
- **Appraisers can be stored and selected for Gift-In-Kind donations.**
- **MAJOR FEATURE! Donation receipts now show "advantage" and "eligible" amounts. This is particularly important in Canada for 2009 since the tax receipt rules have changed.**
- **MAJOR FEATURE! Program handles businesses and organizations much better so that donations can be received from these entities. "Add Business" button added to the Membership Manager.**
- **MAJOR FEATURE! Added bilingual and French Tax Receipts. Non-Canadian churches can turn off this feature in Setup Manager.**
- Many new tax receipt formats added including receipt with offering details on one page.
- Gift-In-Kind donations no longer affect the Deposit Slips or summary data in the Giving Manager.
- Added a "ChurchWatch News" form that fetches information from the internet. Never be out of contact with White Mountain Software again.
- Ability to export to QuickBooks, Quicken and Simply Accounting with summary totals only or with all offering details. A comment has been placed in the software for the Simply Accounting file format.
- Real time map lookups to find a household location. Support for many different mapping websites. Support for selected zoom and many other options.
- Ability to print directly to envelopes in the Mail Manager.
- Ability to print church mailing labels in the Mail Manager.
- Ability to delete all tax receipts to allow you to re-do the tax receipts. Note that the software checks for multiple tax receipt issue dates in the database and if more than one exists, this operation is not allowed.
- Registers behaviour can be changed on the Options page. You can either use pull-down lists or type data directly into the list fields for quicker data entry.
- Family tree link buttons added to Baptism and Death registers so that years of family tree data can be quickly browsed.
- Added Life Version to Membership Manager.
- There is a new "How They Heard" field in the Membership Manager.
- Mailing labels can now show envelope number, district/area or mailbox #.
- QuickSearch list in the Membership Manager now lists children in age order.
- QuickSearch list in the Membership Manager now has male/female icons.
- Add ability to change behavior when adding a new family - automatically add to church directory or not. Default is not for privacy reasons.
- Ability to make a user defined report a favourite report.
- Ability to mark households as "Do Not Contact" for reference in the Mail Manager.
- All sort orders corrected.
- Envelope number field increased to 10 characters to accommodate larger envelope numbers.
- Ability to print tax receipts directly from the screen preview without messing up the "receipt printed" flags.
- Many different warnings added to the Tax Receipt Manager to help you avoid common mistakes.
- Deceased persons are now indicated in the person lists in the Giving and Pledge Managers.
- No longer possible to restore a backup from an older version into a newer version of ChurchWatch.
- Longer names now fit better on all mailing labels.

- Ability to hide address on mailing labels (for envelope boxes for example).
- A PLEDGE button has been added to the Giving Manager to look up pledges for the selected person.
- Preferred name, if it exists, is used throughout.
- Blank account names are now trapped and not permitted.
- When an account name is changed, the user is asked to confirm that that was the intention.
- Added “cremation” checkbox to Death Register.
- Various fields in the Registers Manager have been lengthened to accommodate longer names etc.
- Name tags now support longer names.
- When hovering your mouse over the father/mother links in the Membership Manager, the name is shown in a yellow popup.
- Ability to print tax receipts in batches to send smaller print files to your printer. Increases reliability of printing tax receipts.
- ALL lists in the Membership Manager now resize with the form.
- Added profession of faith date to the Marriage Register.
- When balance goes to zero in the Splits Editor, the POST ALL button is automatically focused. Pressing return key, quickly posts all entries.
- BSZIP.DLL has been renamed - can be seen as a virus by some virus checkers.
- Tax Receipt Audit Report now uses same name that appeared on the tax receipt.
- Added copy-anniversary-from-spouse button in the Membership Manager.
- Districts and emails now exported in the Mail Merge data.
- Mail Merge data output can now be Excel or text format.
- “Users online flags” are now handled much better and can even recover from a computer crash. New Users Online form added.
- All “Filtered” indicators have the same look to be consistent. Filtered indicator added to forms that did not have one in the past.
- Grids (tables) now have splitter bars that allow you to split the view in two to fix one half while the other is scrolled.
- Finally fixed a bug in the QuickSearch lists that often showed the first item as blank.
- Added Historical Roll number to the Membership Manager. Present, although you can enter or assign one, the software does not use this number for anything nor does it show up in any reports.
- Membership Manager code improved to avoid crashes.
- Single quotes are no longer used in filename/path lookups to improve reliability of importing files into ChurchWatch (for example bitmaps for photos and logos).
- Giving data can now be filtered by type (cheque, cash, gift-in-kind etc) in the Giving Manager.
- Mail Manager salutations improved and made consistent. Mailing labels now show exactly what is shown in the on-screen examples in the Mail Manager.

## REPORTING IMPROVEMENTS:

- Over 625 built-in reports now included.
- Latest version of the Report Generator installed, produces much faster reports.
- Report Generator has seven new report output formats including Open Office formats.
- Ability to convert reports to other formats directly from the enhanced screen previewer
- Ability to email a report directly from the enhanced screen previewer (in PDF format)
- All Pledge reports can now cross calendar year boundaries!
- New report with family names, envelope number and with no family duplicates.
- Giving Reports that list accounts now ask if you want accounts with zero dollar totals listed or not.
- Names in all reports are now properly sorted and use preferred and middle names.
- Option to print middle names on any report that has a person name.
- Added reports to compare week(s) from two different giving years.
- Added other reports to compare data between giving years:
    * Totals with average per person, average per giver
    * Average per week
    * Average per month
    * Giving per month (List all months)
    *Average per week for one account
    *Average per month, one account
    *Giving per month, one account
    *Giving between two dates compared year to year
    *Donars per $ range
- Added Registers Reports and new category in the Report Manager.

- Adds a first-time giver report (first offering) and a have-not-given-in-awhile report.
- Added Pledge forms to assist in data gathering.  Forms include a report of previous pledges.

## GENERAL IMPROVEMENTS:

- 100% support for Microsoft Windows Vista!  No hassle installation on Vista, no tweaking required.
- Upgrades the database engine to the latest version from Microsoft.
- Much easier, faster, smaller installation.  New install file is 50% smaller which makes for faster downloads and installations.
- Reduced features in the “light” version - Scheduling Manager is not enabled in this version.
- “Light” version no longer counts deleted records towards the limit of 250 people.
- Ability to locate the ChurchWatch data folder anywhere you like without moving the program’s installation folder.
- Easier network installation.  No need to modify the shortcut options to get the workstation copies working.
- Unique user security levels for EACH database.  Several other improvements to user management including copy-from-another-user and copy-from-another-database functions.
- Internet update now supports mailing labels reports (was not supported in prior versions).
- Database Rescue Utility can now repair batch dates and ID in the giving data.
- Database Rescue Utility can now repair security codes data.
- Export support for Simply Accounting for DOS has been dropped.
- Overall look improved.  Added Windows Vista themes.

# Chapter 1 Installation and Overview

Thank you for purchasing ChurchWatch Church Management Software. We trust you will be impressed with the rich feature set and flexibility of ChurchWatch as well as its ease of use. Before using ChurchWatch you should fully read this User's Guide to become familiar with the functions and features now available to your church office. ChurchWatch is written in Microsoft Visual Foxpro (tm) and uses industry standard xbase database file formats. Xbase files are compatible with many other third party programs such as Seagate's Crystal Reports (tm). This User's Guide assumes that you have basic familiarity with the Microsoft Windows (tm) operating system.

## Features

ChurchWatch is organized as a set of "Managers" which make up a comprehensive software suite. Each Manager can access the ChurchWatch tables independently and several or all Managers can be open simultaneously. The ChurchWatch Managers are:

| Manager | Description |
|---|---|
| **Import Manager** | Import your existing church data into ChurchWatch |
| **Export Manager** | Easily export data from ChurchWatch to several formats |
| **Membership Manager** | Family groupings, addresses and contact information, person details |
| **Visitor Manager** | Details about visitors |
| **Giving Manager** | Keep track of contributions/offerings |
| **Tax Receipt Manager** | Part of the Giving Manager used at tax time |
| **Pledge Manager** | Keep track of pledges towards giving accounts |
| **Schedule Manager** | Keep track of people, staff, facilities, resources, attendance, visitations and meeting minutes |
| **Mail Manager** | Create mailing labels, mail merges, form letters, name tags etc |
| **Message Manager** | Send inter-office messages using ChurchWatch |
| **Sermon Manager** | Keep track of sermons. |
| **Library Manager** | Keep track of church library materials. |
| **Report Manager** | Hundreds of pre-defined reports |
| **Query Manager** | Ad-hoc SQL queries into any ChurchWatch table |
| **Bible Manager** | Several public-domain Bible translations |
| **Hymn Manager** | Lyrics to nearly 700 hymns |
| **Backup Manager** | Backup your data to protect your investment |
| **Restore Manager** | Restore your backed up data in the event of loss of data |
| **Registers Manager** | Catholic registers for Baptism, Confirmation, Marriage, Profession of Faith, Death and First Communion |

Table 1-1 ChurchWatch Managers

## System Requirements

Minimum requirements (*) for running ChurchWatch are:

- Pentium class computer
- 512 Megabytes of RAM
- 150 Megabytes of hard disk space
- Microsoft Windows 32 bit operating system (98, XP, 2000, Vista etc). ChurchWatch does not run in Windows 3.1 or Windows 95.
- 800x600 video display

*(*) results and performance may vary on your computer hardware.*

White Mountain Software Recommends:

- Recent computer hardware
- 1 Gigabyte of RAM
- 300 Megabytes of hard disk space
- Microsoft Windows XP or Vista operating system
- 1024x768 or higher wide-screen video display
- Sound card and speakers
- Analog Modem for phone dialing
- Backup disk drive

## Single User Installation on Windows 98 and Windows XP

To install ChurchWatch simply insert the program CD into your CD-ROM drive and close the door. After a few seconds an installation screen will appear. If the installation screen does not appear you can run the setup program manually as follows:

1. Click the Windows Start button
2. Choose Run
3. Type d:\setup.exe (you may need to replace the “d:” with the drive letter of your CD-ROM drive)
4. Click the OK button

Follow the instructions to install ChurchWatch. We recommend installing to the directory C:\Program Files\White Mountain Software\ChurchWatch4 but you may choose any directory on any drive. If you purchased a download, instructions will be sent along with the download instructions.

## What to do if You Have Problems After Installing

If you receive “access denied” type errors when attempting to run ChurchWatch, it needs to be reinstalled from an administrator account or the setup.exe file must be run as an administrator. ChurchWatch must be permitted to have read/write/delete/create privileges in the ChurchWatch root folder and in all subfolders underneath the ChurchWatch root folder. Right-click your mouse on the SETUP.EXE file found on your CD or from your download. When the menu appears, chose “Run as…”


Figure 1-1 Right-Click in Windows XP

In the form that appears, choose “The following user”, then choose “Administrator”, enter the password if any, and then click OK. The setup.exe program will then run with Windows Administrator privileges.

Figure 1-2 Run As Form in Windows XP

## Single User Installation on Windows Vista

ChurchWatch Version 5 is fully compatible with Windows Vista but the security features in Windows Vista are much more strict. You MUST run the install program with Windows Administrator privileges. If you are installing from CD, insert the CD but if it auto-runs, cancel the installation. Locate the setup.exe file on the CD or from the download location if you downloaded the file. Right click your mouse on the setup.exe file. The following menu will be displayed:

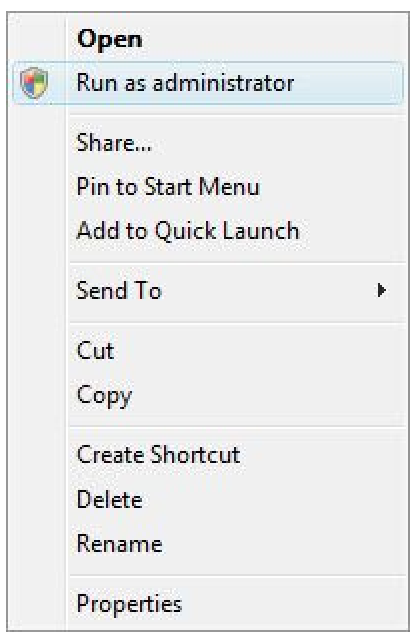


Figure 1-3 Right-Click in Windows Vista

Choose “Run as administrator” and then answer any further prompts and security checks. The setup.exe program will then run with Windows Administrator privileges.

## Network Installation

***IMPORTANT:*** *The network installation steps in ChurchWatch Version 5 have changed and the setup process is somewhat simpler. Please follow this section carefully.*

### Server Installation

Network installation requires the purchase of additional licenses and a separate special workstation installation CD or download for each workstation on the network. The single user copy of ChurchWatch is installed on the network file server and the workstation installation copies are installed at each workstation that you have purchased a license for. ChurchWatch can operate on any network that supports peer-to-peer file sharing under Microsoft Windows. If you can see the server’s drives under “Network Neighborhood” or “My Network Places” in the Windows Explorer you can likely run ChurchWatch on your network.

To install the server copy:

1. Choose one computer to be a file server. This should be your most powerful computer and one that will be powered on at all times.

2. At your chosen network file server, follow the single user installation instructions in the previous sections. Use the CD labeled “Single User or Server”.

3. The installation will create a ChurchWatch folder and install the software there - the default is c:\Program Files\White Mountain Software\ChurchWatch 5. Mark the ChurchWatch folder you just created as shared and add all network users who will be using ChurchWatch. This is done as follows:

4. Right-Click your mouse on the Windows Start button

5. Choose Explore


Figure 1-4 Start->Explore

6. In the Explorer window find the folder you just created, then find the “ChurchWatch Data” folder underneath it. Usually this can be found by default at c:\Program Files\White Mountain Software\ChurchWatch 5\ChurchWatch Data. Right-click your mouse on the ChurchWatch Data folder.

7. Choose “Sharing”, “Share” or “Sharing and Security” depending on your operating system. In Windows 98 and Windows XP, you should now be in the correct form. For Windows Vista, click the “Advanced Sharing” button to get to a similar form (see figure 1-5).

8. Indicate that the folder is shared (checkbox) and give it a name such as ChurchWatch Data. In Windows XP, also check the box “Allow network users to change my files”. Here is an example from both:

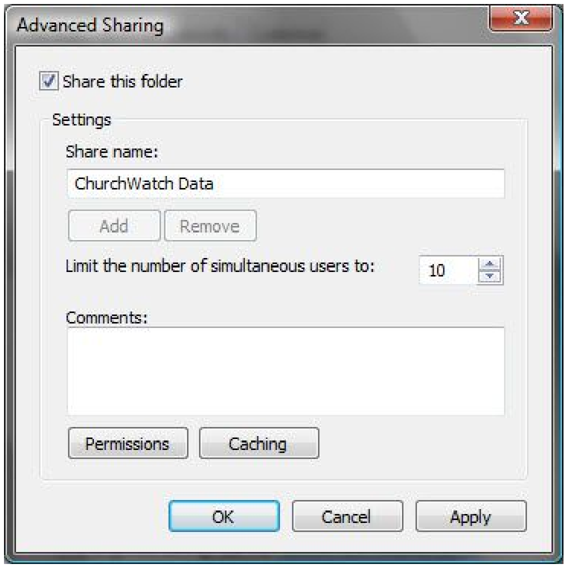



Figure 1-5  Folder Sharing Properties in Windows Vista

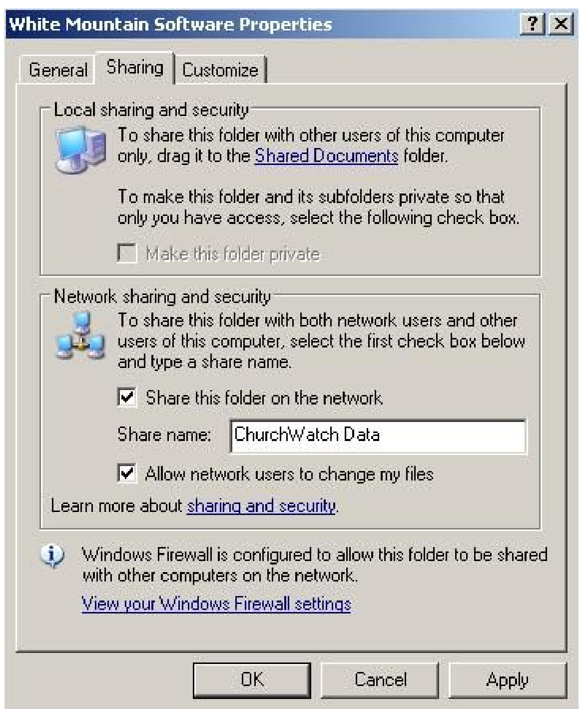



Figure 1-6 Folder Sharing Properties in Windows XP

9. Depending on your operating system and security levels you may need to add any network users and give them full access permissions to the shared folder.  Note that you will require administrator privileges to perform this action.  In the Windows Vista example in Figure 1-5, click the Permissions button.  Give specific users (best) or everyone (more wide open) full control over the ChurchWatch Data folder so that files can be read/written/created/deleted.

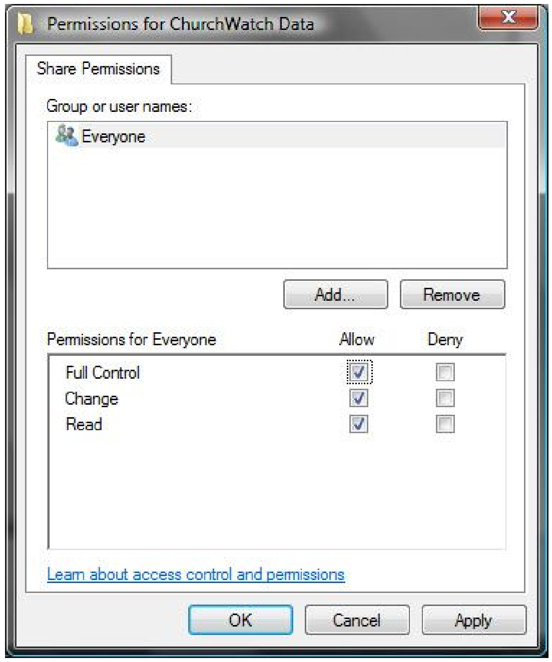



Figure 1-7  Network Sharing Permissions

**Workstation Installation**

1. Install the workstation software using the instructions in the previous “Single User Installation” sections above.

2. Once the installation completes, locate the ChurchWatch 5 folder which should now be present on your Windows Desktop. Double click to open this folder.


3. Double click the ChurchWatch 5 icon inside the ChurchWatch 5 folder on your desktop to launch the software. ChurchWatch will notify you that it cannot find the data. When you run the workstation software for the first time, this is normal.

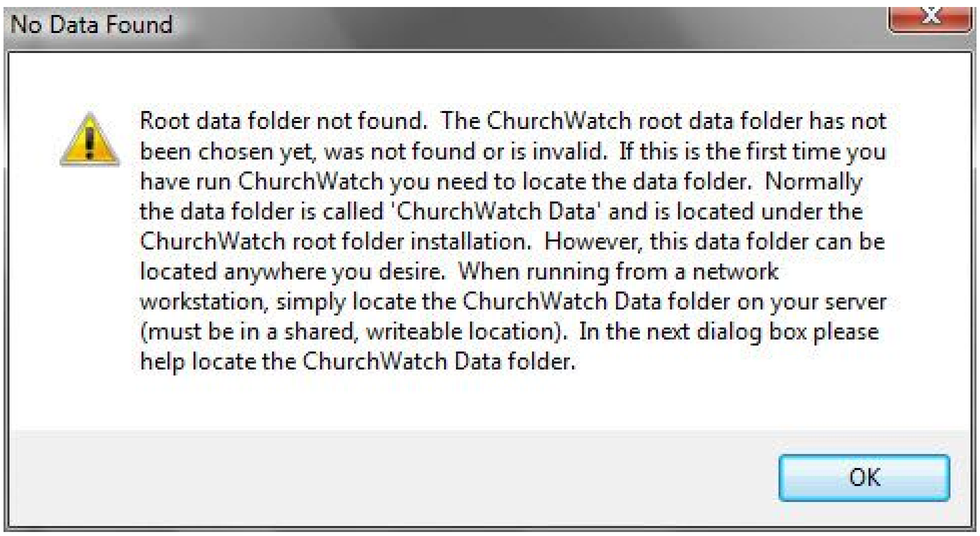



Figure 1-8 No Data Found Popup Message

4. Click the OK button. In the window that opens, simply browse to your server’s “ChurchWatch Data” folder. There is no need to map a drive letter to this folder and no need to modify the start-in settings of the workstation’s cwatch.exe file.

## The “ChurchWatch Data” Folder and Making Your Own Backups

A nice feature in Version 5 is that all writable data is now located in one folder called “ChurchWatch Data”. This folder can be moved anywhere, any time you like. You can move it any time you want, but note that when you run ChurchWatch the first time after moving the folder, it will warn you that it cannot find the data and you’ll have to browse to the new location of the ChurchWatch Data folder.

A very nice side effect of this organization is that you can confidently create your own backups simply by saving the “ChurchWatch Data” folder and all its contents. All writable data is found under this folder. There is no need to backup anything else under the ChurchWatch 5 folder since it can always be reinstalled.

## ChurchWatch Shortcut Icons

After installing, you will find a folder on your Windows Desktop called “ChurchWatch 5”.


Inside the ChurchWatch 5 folder, you will find shortcuts to all the ChurchWatch applications. You can also find shortcuts to these applications in START->PROGRAMS->CHURCHWATCH->….

Here is a screen shot of the ChurchWatch 5 folder contents:

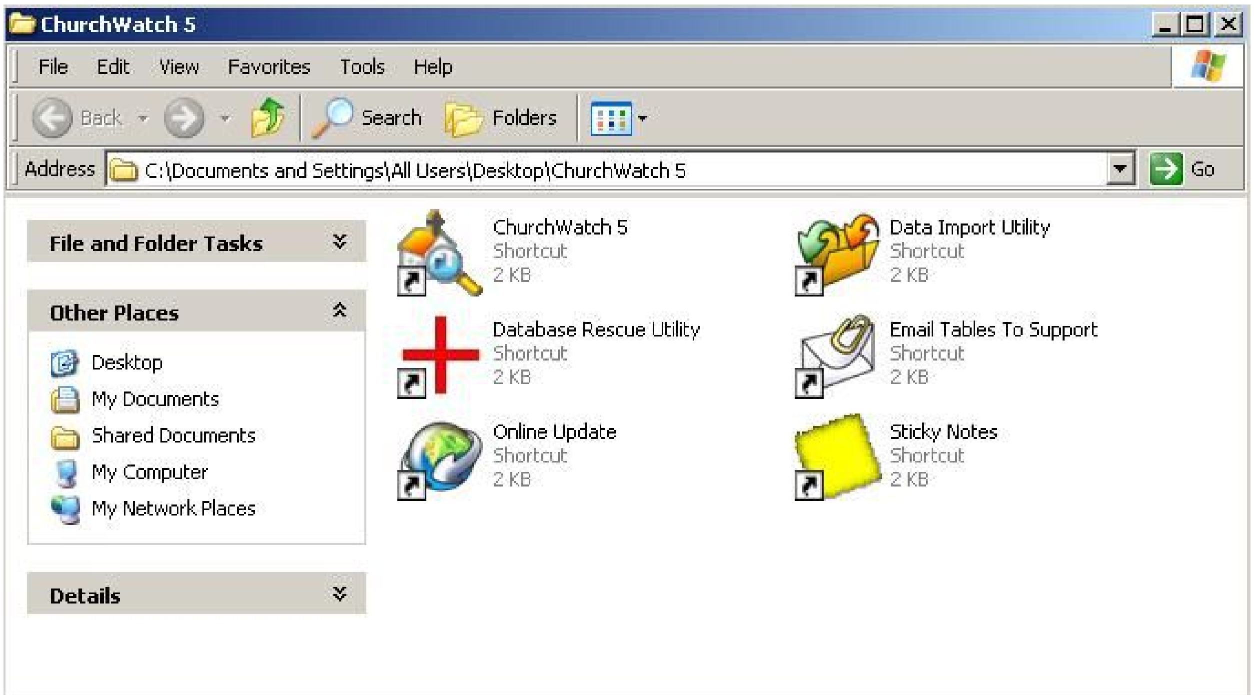



Figure 1-9 ChurchWatch 5 Desktop Folder Contents

## Importing Data From Previous Versions

You can easily import ChurchWatch data tables from a previous version using a special import program called UPGRADE.EXE. For your convenience this program is now located in the ChurchWatch 5 shortcuts folder (see figure 1-9). Double click the icon to run the program. Follow the instructions and answer the prompts to import your existing data. The UPGRADE.EXE program can only be run after a fresh installation of ChurchWatch 5. If you have added any data to ChurchWatch since installation, UPGRADE.EXE may delete it. When asked where your existing ChurchWatch data exists, it is very important that you give the root folder location of the old version of software, <u>NOT</u> a backup folder. Using a backup folder will not work.

## Using ChurchWatch in Multi-User Environments (Network)

ChurchWatch uses Optimistic Record Buffering which is the preferred method in database systems.  This simply means that two or more user's on the network will be able to view and edit the same record at the same time.  The first user to save the record by moving to a new record or by closing the form will be the "winner".  Any other user attempting to change the same record will receive a warning as shown in figure 1-10.  ChurchWatch gives you the option of overwriting the first user's changes or abandoning your changes.  Except in exceptional circumstances, you should always abandon your changes and then re-edit the record.

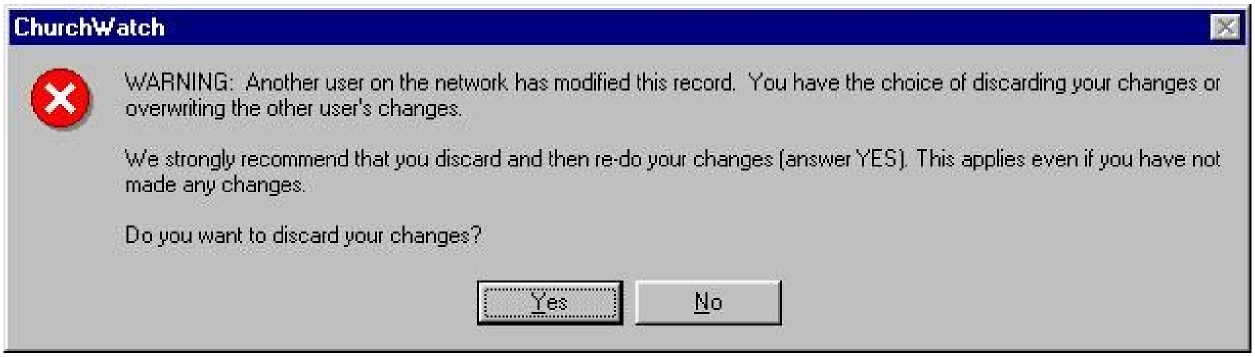



Figure 1-10  Record Lock Warning

## Uninstalling ChurchWatch

To uninstall ChurchWatch follow this procedure:

1. Click on START-SETTINGS-CONTROL PANEL or in Windows XP and Vista, START-CONTROL PANEL.
2. Double click the "Add/Remove" Programs icon.  In Windows Vista, it is now called "Programs and Features".
3. Select ChurchWatch in the list and then click the Add/Remove (XP) or Uninstall/Change (Vista) button.

## Re-Installing ChurchWatch

***CAUTION!*** *Re-installing ChurchWatch will install empty database tables.  You will need to make a backup before uninstalling or re-installing ChurchWatch!  Be sure to protect your data!*

## Important File Types

Your data is contained in three different types of files: *.DBF, *.CDX and *.FPT.  These files are found in the "ChurchWatch Data" folder, the "Archive" folder and in any sub-church folders.  Digital photos are stored in the "Photos" folder and digital signatures are stored in the "Sigs" folder.  To create your own backup simple backup the entire "ChurchWatch Data" folder and all its sub-folders.

## Setting Screen Resolution

If your display resolution is set to 640x480 you may notice that many of the ChurchWatch forms do not fit properly on the screen. In fact, the installation may not allow you to install if your display is of this resolution since 800x600 is the minimum resolution. During the design of ChurchWatch we have made a conscious decision to support screen resolutions of 800x600 or higher only. This allows ChurchWatch to take advantage of the extra screen space to fit more information onto each form. Set your screen resolution to a resolution of at least 800x600 with a color depth of at least 256 colors. Note that ChurchWatch looks much better and runs slightly faster if you set your color depth to Hi-Color (16 bit or 32 bit) or better. To set your screen properties:

1. Right click your mouse on any empty space on the Windows Desktop
2. Choose Properties on Windows 98/XP or Personalize on Windows Vista
3. Choose Settings or Display Settings
4. Set the Desktop Area or Resolution to at least 800x600
5. Set the Color Palette or Colors to at least 256 colors, 16-bit and 32-bit color is highly recommended.
6. Click OK to save your changes

If you cannot achieve these settings it probably means your video card does not have enough memory. It is better to have a larger Desktop Area with less colors.

## Starting ChurchWatch

Simply double-click on the ChurchWatch icon in the ChurchWatch 5 Desktop folder or choose ChurchWatch from Windows' START->PROGRAMS->CHURCHWATCH 5 OR START->ALL PROGRAMS->CHURCHWATCH 5 to start ChurchWatch. A title window will appear giving the name of the program and the software version you are running.

***TIP:*** *Note that you can click on the title window or press any key to remove it from the screen more quickly.*

## "Readme" File

Be sure to check the contents of the README.TXT file on your CD or after installation for any information that was not available at the time this manual was written.

## Handling Multiple Churches

ChurchWatch easily handles multiple databases or multiple churches. There is no limit on the number of secondary databases you can create and maintain. More information follows in chapter 2 and chapter 4.

## Running on Windows Vista

ChurchWatch Version 5 is fully Vista compatible. No "tweaks" or special setups are required. However, we do recommend that you chose the "Vista" theme in SETUP-APPEARANCE so that default Windows Vista fonts are used. The software also looks better in this theme.

# *Chapter 2 Menus, Toolbars and Shortcuts*

ChurchWatch provides three different main menus to give different forms of access to the ChurchWatch Managers and other features. This chapter describes the menus and ChurchWatch toolbars in detail.

## Top-of-Screen Menu

The main menu found at the top of the screen is the usual Windows pull-down type of menu. There are menu items for File, Edit, Forms, Lists, Window and Help. For more detailed information on the sub menu items in these menus refer to the applicable chapter in this user's guide. A summary follows:


Figure 2-1 Top-of-Screen Menu

***Tip:*** *The underlined items in the menus (and on buttons) indicate keyboard shortcuts. Press the ALT key at the same time as the indicated letter to activate the menu item or button.*

**File Menu**

■ **Statistics** This item displays statistical information about your database tables including the number of records in each table and the number of deleted records in each table.

■ **Who's On** This item is available only if security is enabled and is useful only if you are operating on a network. Who's On lists all users and whether they are currently logged into ChurchWatch. If the list is in error due to a power outage or software crash, you may have to clear the user flags (found on the SETUP-SECURITY page) although in Version 5 this is usually done automatically via a time-out system.

■ **Message Manager** Loads and displays the Message Manager for sending inter-office (user to user) and internet email.

■ **Set Password** This item is available only if security is enabled. Allows you to change your ChurchWatch login password.

■ **Import Data** Launches the Import Manager to allow you to import data from several formats into ChurchWatch.

■ **Export Data** Launches the Export Manager to allow you to export data from ChurchWatch to one of several different formats. **Also includes contribution data export into formats understood by many standard accounting software packages.**

■ **PhoneTree ® Export** Launches the Phonetree ® Export Wizard that allows you to export name and phone information to a PhoneTree compatible file. For more information on PhoneTree and cold calling refer to www.phonetree.com. PhoneTree is a registered trademark of PCS, Inc.

■ **Backup** Launches the Backup Manager to perform a backup of all your ChurchWatch data (for the current church only).

■ **Restore** Launches the Restore Manager to restore data that was previously backed up with the Backup Manager (to the current church only).

■ **New Giving Year** Archives all giving data and all expired pledge data and all membership and clears the giving table. Should be used at year end or in a new year only.

■ **Page Setup** Gives access to printer properties. Useful mainly when modifying or creating new reports. Otherwise is likely greyed-out.

■ **Puzzle** A simple puzzle game.

- **Exit** Exits ChurchWatch.

### Edit Menu

- **Undo** Used to recall deleted text or correct a mistake. Useful only in data field entries. Undo does not recall deleted records. You may also use the CTRL and Z keys at the same time as a shortcut.

- **Redo** Used to undo the undo (replace the previous item). You may also use the CTRL and R keys at the same time as a shortcut.

- **Cut** Copies the highlighted text to the clipboard and deletes the highlighted text. You may also use the CTRL and X keys at the same time as a shortcut.

- **Copy** Copies the highlighted text to the clipboard. You may also use the CTRL and C keys at the same time as a shortcut.

- **Paste** Pastes the Windows clipboard contents into the current data field or edit window. You may also use the CTRL and V keys at the same time as a shortcut.

- **Select All** Highlights (selects) all text in a data field or in the Bible and Hymn Managers. Note that your cursor must be inside the edit window for this item to be active.

- **Find** Launches the find text dialog box to allow you to search for some text of interest.

- **Mass Edit** Launches the Mass Edit Wizard which allows you to perform massive changes to your databases. For example, you could change anyone with a zip code of 12345 to 12346.

- **Preferences** Launches the Setup Manager form.

### Forms Menu

This menu gives quick access to all the ChurchWatch high level forms and managers.

### Lists Menu

This menu gives quick access to all the ChurchWatch forms dealing with lists.

### Window Menu

This menu gives you quick access to all open forms and windows. In addition it allows you to auto arrange all open windows.

### Help Menu

This menu gives you access several important items:

- **ChurchWatch Help Topics**
  The ChurchWatch built-in help system. The entire contents of this manual can

be found here.

- **Update Your Software Online**
  With your purchase of ChurchWatch you are entitled to free software upgrades within the current version. If you have an internet connection simply select this item to have your software automatically updated via the internet.

- **ChurchWatch On The Web**
  A quick link to the ChurchWatch web page. Your internet connection must be "live" first.

- **Email to Support** This item launches your mail program to send an email message to ChurchWatch support. You must be connected to the internet.

- **Email Tables to Customer Support**
  This item compresses your church data tables and emails them to ChurchWatch support. You have the option of adding a comment to explain the problem and we recommend that you do so. Your internet connection must be "live" first. You can also perform this operation outside of ChurchWatch from START->PROGRAMS->CHURCHWATCH4->EMAIL TABLES TO SUPPORT.

- **About** Information about your software versions.

## Main Menu

The main menu is a form that is displayed on the ChurchWatch desktop. If you do not wish to use this form you can set it to auto-minimize in SETUP-USER PREFERENCES.


Figure 2-2 The ChurchWatch Main Menu Form

***Tip:*** *You will find that the main menu operates faster if you set your video display to 16 bit color or "Hi Color" or better.*

Enter your church name in the SETUP-CHURCH to have it displayed at the top of the main menu.

## ChurchWatch Shortcut Toolbar

The ChurchWatch Shortcut Toolbar is normally found near the top of the screen and contains buttons that allow access to most of the main forms. The toolbar is moveable and dockable and for each user, ChurchWatch will remember where you last located and/or docked the toolbar.

Figure 2-3 ChurchWatch Shortcut Toolbar

## ChurchWatch Data Context Toolbar

ChurchWatch easily manages the data from multiple churches/multiple databases and from archived giving years. The ChurchWatch Data Context toolbar is a simple and quick way to select the database or Church data you want to work on. The left list selects the Database name and the right list selects the giving year (current year or archived years). This toolbar is normally found near the top of the screen. The toolbar is moveable and dockable and for each user, ChurchWatch will remember where you last located and/or docked the toolbar. Caution should be exercised when editing past giving years - don't forget that you have a past year selected. As a warning indication, the right list will turn red when a past giving year is selected. In addition, this toolbar contains a button for disabling the auto-formatting features of ChurchWatch temporarily. Auto format rules are set in SETUP-FORMATS. However, for some names the auto formatting rules may not apply properly (for example "deHaan"). Simply disable Auto Formatting here on the Data Context toolbar (Ab button), enter the name, tab off the field and then re-enable Auto Formatting.


Figure 2-4 The ChurchWatch Data Context Toolbar

## Undocking and Moving the Toolbars

To move and/or undock either toolbar simply click your mouse on the vertical bar at the far left. While continuing to hold the mouse button down, drag the toolbar to the desired position. If dragged onto the ChurchWatch desktop it will "float" there just like a window until you move it. When "floating" the toolbar is always on top and may cover up parts of forms. Note that when the toolbar is located on the ChurchWatch desktop, its shape may change automatically. The toolbars are sizeable so you can resize them as desired when they are "floating".

## Docking the Toolbars

To dock (lock in place at the top, bottom, left or right of the screen) the toolbar use the move procedure above and move the toolbar to the extreme top, bottom, left or right of the ChurchWatch desktop until it locks in place. The toolbar will remain docked until you move it again. When docked, forms will not be allowed to use the space occupied by the toolbar. When docked, you can still click and drag on the bar at the far left to reposition the toolbar slightly as desired.

## Shortcuts

ChurchWatch includes many shortcuts to help make you more productive.

a. **Sticky Notes** - Sticky notes are simply temporary windows where you can place reminders to yourself. Sticky note windows always remain on top regardless of the state of the main ChurchWatch window. Even when you exit ChurchWatch, the sticky notes will remain on your desktop. Sticky Notes are accessible from the main menu or under FORMS-STICKY NOTES. A quicker way is to press the F3 function key shortcut.

b. **SmartForms** - All forms in ChurchWatch are "smart". For each user, they will remember their size and position as well as other state information such as sort orders and column sizes in grids. Most forms are sizeable. To change the size of a form click on the border of the form and drag it to a new size. You can reset the SmartForms information in SETUP-MAINTENANCE but only the "admin" user account can do this and it will reset the SmartForms information for all users at once. You can also maximize and minimize most forms using the sizing buttons on the title bar of the form window (see figure 2-5 below).

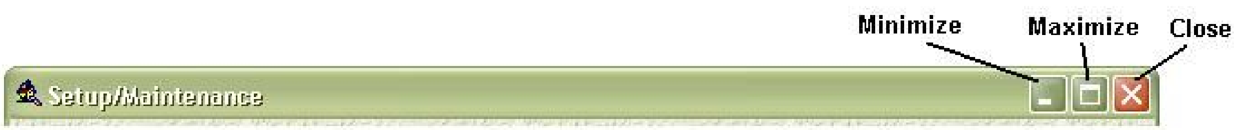



Figure 2-5 Standard Form Buttons

c. **Right Clicks** - Many of the lists and grids in ChurchWatch have mouse right-click shortcut menus. To access the menu, position your mouse over the list or grid and then click the right mouse button. A shortcut menu will "pop up". Select the shortcut menu item of interest. In the case of lists, only list items are "right-clickable" - unused areas of the list are not. If the list is empty, the short cut menu is not accessible except in the case of QuickSearch lists where you can click on the "QuickSearch" title to access the shortcut menu. Refer to the example menu in Figure 2-6.

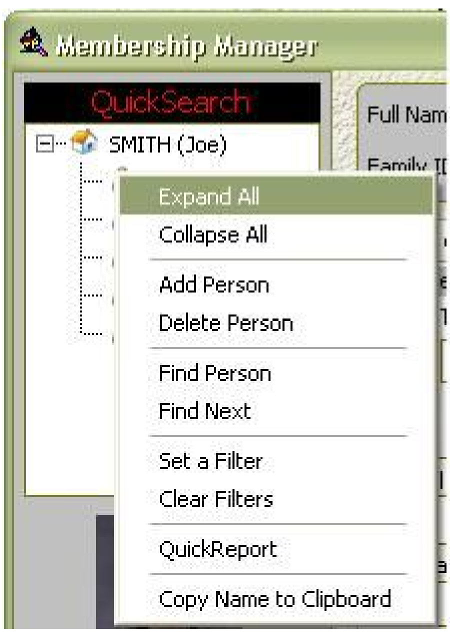



Figure 2-6 Right-Click Example

d. **QuickSearch Lists** - All main ChurchWatch forms have a QuickSearch list located at the left side of the form. The QuickSearch list is a quick way to locate items of interest. The QuickSearch lists have a keyboard search feature built in. You can quickly search the list by first selecting it (click on an item in the list) and then by typing the first few letters of the item you are looking for. In addition, the Quick Search list is horizontally sizable. Click on the area between the right side of the list and the form and then drag to resize. Refer to the example in figure 2-7 below. In many cases you can delete the selected item in the QuickSearch list by pressing the DELETE key on your keyboard.

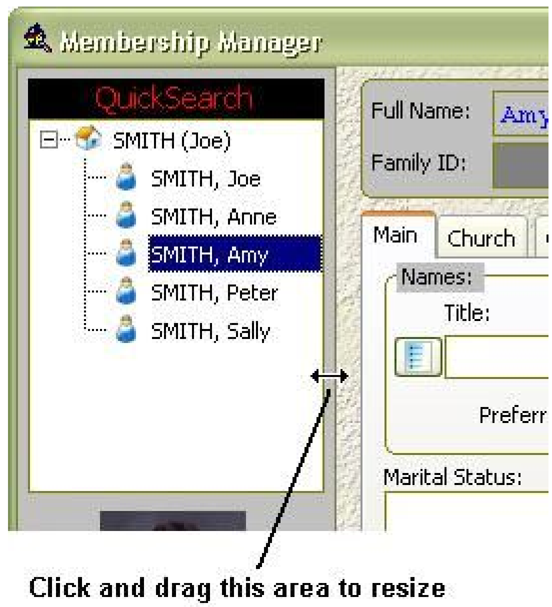



Figure 2-7 Resizing a QuickSearch List

e. **Column Width Sizing** - Many of the ChurchWatch forms have grids or tables in them. Each of the columns within the grid are sizeable. The ChurchWatch SmartForms will remember the size of the columns and restore them automatically next time you open the form. To resize the width of a column, click on the vertical bar between the columns and drag the column to a new size. Refer to the example below.

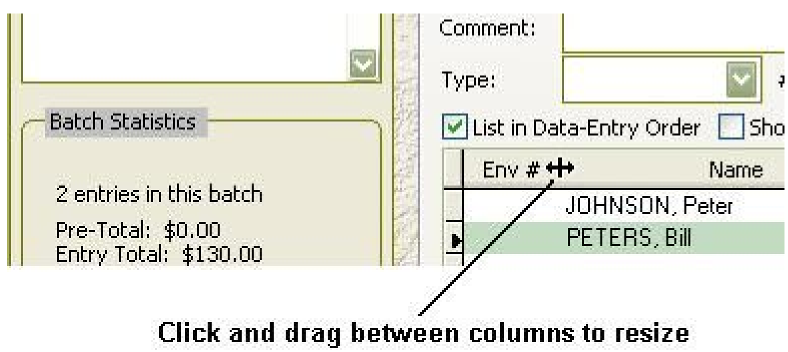
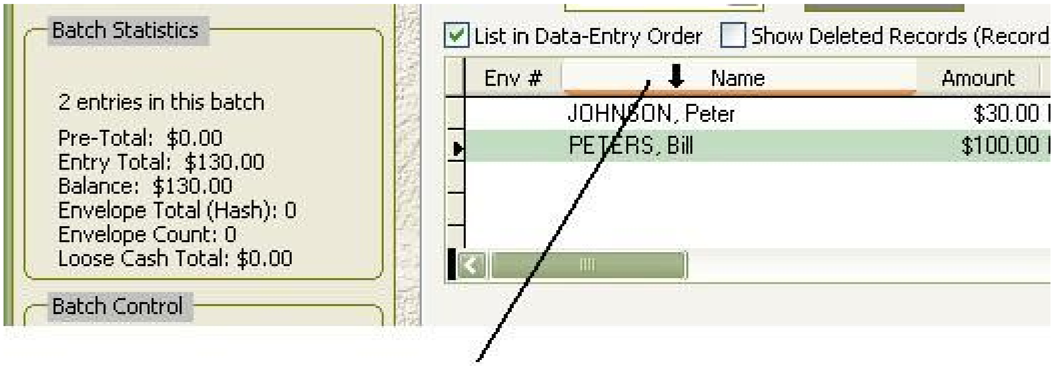



Figure 2-8 Resizing Columns in Grids

f. **Grid Sort Order** - The sort order of most grids can also be changed simply by clicking on a column header to sort by that column. The mouse pointer will change to a down arrow when you are correctly positioned over the header. SmartForms will remember your sort orders. Refer to the example below.




**Click on a header to sort by that column**

Figure 2-9 Changing the Sort Order in a Grid

g. **Multiple Selection Lists** - Many of the lists in ChurchWatch are multiple selection capable. To select several items, click once on the first item, then press and hold the SHIFT key while clicking on the last item. To select items one at a time, click once on the first item, then press and hold the CTRL key while clicking on each of the remaining items. An example of a multi-selection is shown below.


Figure 2-10 Multi-Selection Lists

h. **Menu Shortcuts** - Most ChurchWatch main menu items have keyboard shortcuts. The keys are listed in the top of form menu at the right side of each item.


Figure 2-11 Menu Shortcuts

i. **Working Without a Mouse** - You can work with ChurchWatch even if your mouse is not functioning. Use the TAB key to move between items and use the ENTER key to activate items.

j. **Browse Windows** - All the main ChurchWatch forms have a "Browse" button to view the data in rough spreadsheet style format. You can change the current record being viewed by simply clicking on a record of interest and then by closing the browse window. Columns in the browse window are temporarily sizeable using the same method as described in item e) above. In addition, you can change the order of columns temporarily by clicking on a column header and then by dragging the column to the left or right.

k. **Moving Between Form Items** - The TAB key is used to move between fields and items on forms.

l. **Super Search** - The Super Search form warrants its own section and is described in the next paragraph.

## Super Search!

ChurchWatch has a handy Super Search form that allows you to search for anything, anywhere. To activate the Super Search form, right-click your mouse on any text box or drop down list box. The following form will be displayed:

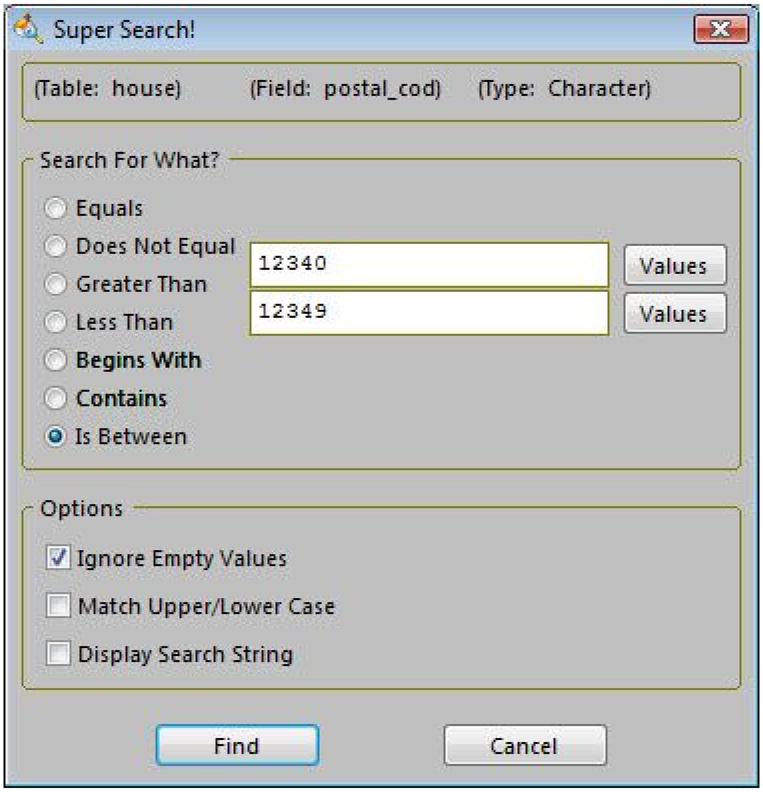


Figure 2-12 The Super Search Form

The top line of the Super Search shows the name of the table and field you are searching on (refer to Appendix A) and the type of the field (will be one of character, numeric or date). In the “Search For What?” box choose the type of search you would like to perform. In the above example, we are looking for a postal or zip code that is between 12340 and 12349. The VALUES buttons can be used to select from all values currently defined in your database, although this is not necessary. The items that appear in the Options box depend on the type of field you are searching and are usually self-explanatory.

## *Chapter 3 ChurchWatch Today and ChurchWatch News Forms*

"ChurchWatch Today" is a summary page that is displayed on startup and when selected from the LISTS menu. "ChurchWatch News" is a built in web browser that defaults the to news page that is relevant to your software version.

### ChurchWatch Today

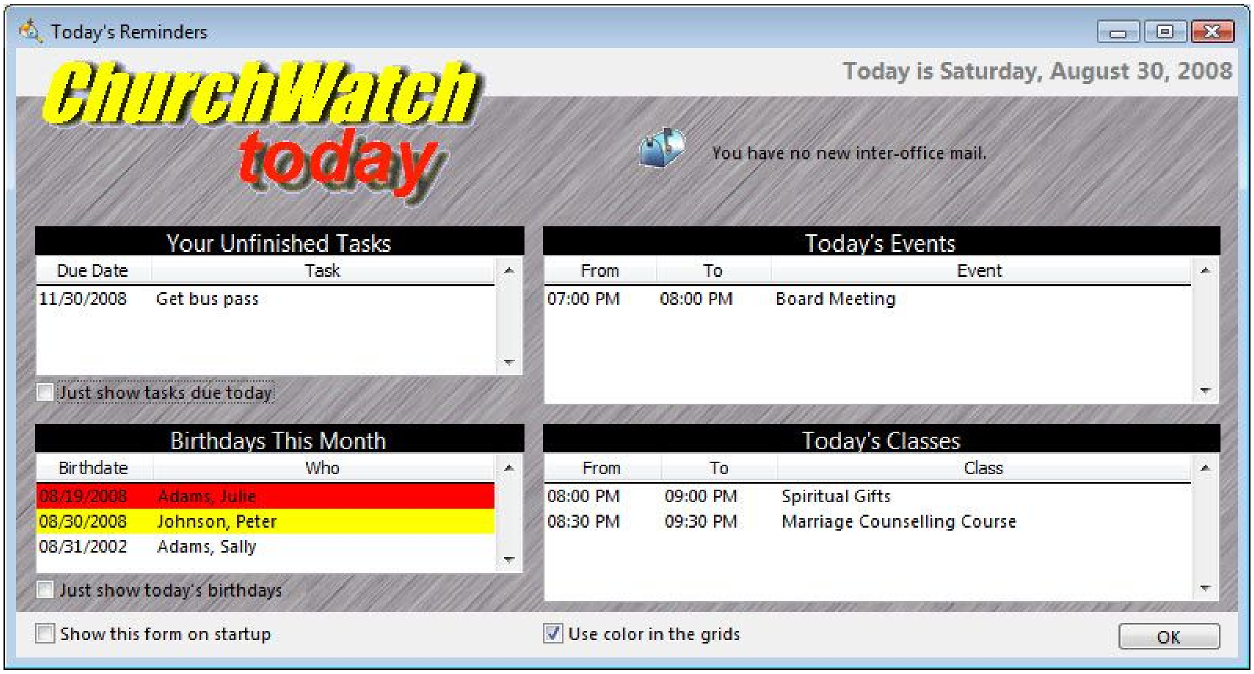



Figure 3-1  ChurchWatch Today Form

This page is handy to determine the current day and date, whether or not you have any inter-office messages waiting, your personal list of to-do items and today's church events and birthdays.  The ChurchWatch Today page is user-specific.  That is, the inter-office mail reminder and the to-do items reflect those of the user who is currently logged into ChurchWatch.  You cannot see the to-do items or mail messages for other ChurchWatch users since these are treated as private.

You can modify what's viewed on this form by checking or unchecking the check boxes on this form.

***Note:*** *If security is turned off on the SETUP-SECURITY page, the ChurchWatch Today page will treat all entered to-do items as public and not assigned to any specific user.  In this case, anyone using ChurchWatch will see the same list.  In addition, no mail notices will be displayed.*

***Tip:*** *If you don't want the ChurchWatch Today page to be displayed on startup you can turn off this feature in the SETUP form on the USER PREFERENCES page.*

## ChurchWatch News

The ChurchWatch News window that appears when you start the Version 5 software is a powerful mini-web browser. This window requires a permanent connection to the internet and a high-speed connection is highly recommended. If you cannot meet these two requirements, the window can be turned off via a checkbox at the bottom of the window.

The ChurchWatch News page displays information about ChurchWatch, tips, reminders and announcements from White Mountain Software. If you have an internet connection, we highly recommend that you leave this form set to auto-open at startup. If it is an annoyance, you can set the auto-close time to a small value. If you do not have internet access, uncheck the "Show this form on startup" checkbox.


Figure 3-2 ChurchWatch News Form

You'll notice that the ChurchWatch News window is just a window, without the usual BACK, FORWARD, REFRESH, HOME type buttons that are typical in a web browser. First of all, the home page is hard-set and cannot be changed. This is because the ChurchWatch News window is intended to convey news and information from White Mountain Software. Over time the email addresses given to us by our customers become invalid as people move around and change their email address. The ChurchWatch News Window allows us to stay in touch with you in a unique way. Although you can turn off this feature, we highly recommend two things:

1. Keep the window turned on and appearing each time you log in. You can set it to auto-close after a few seconds if you wish. There is a checkbox near the bottom of the form for this purpose.

2. Take notice of the contents to see if anything new has been added or if there is a newer version of your software. Sometimes, the news may not change over a period of time but allow the window to open when you start ChurchWatch so that when something new is announced, or there is a new version, you'll be kept informed.

**Commands Available Inside the News Window**

You can right-click your mouse inside the ChurchWatch News browser window to bring up a menu of various commands. Here is an example screen shot showing the menu just after a mouse right-click.

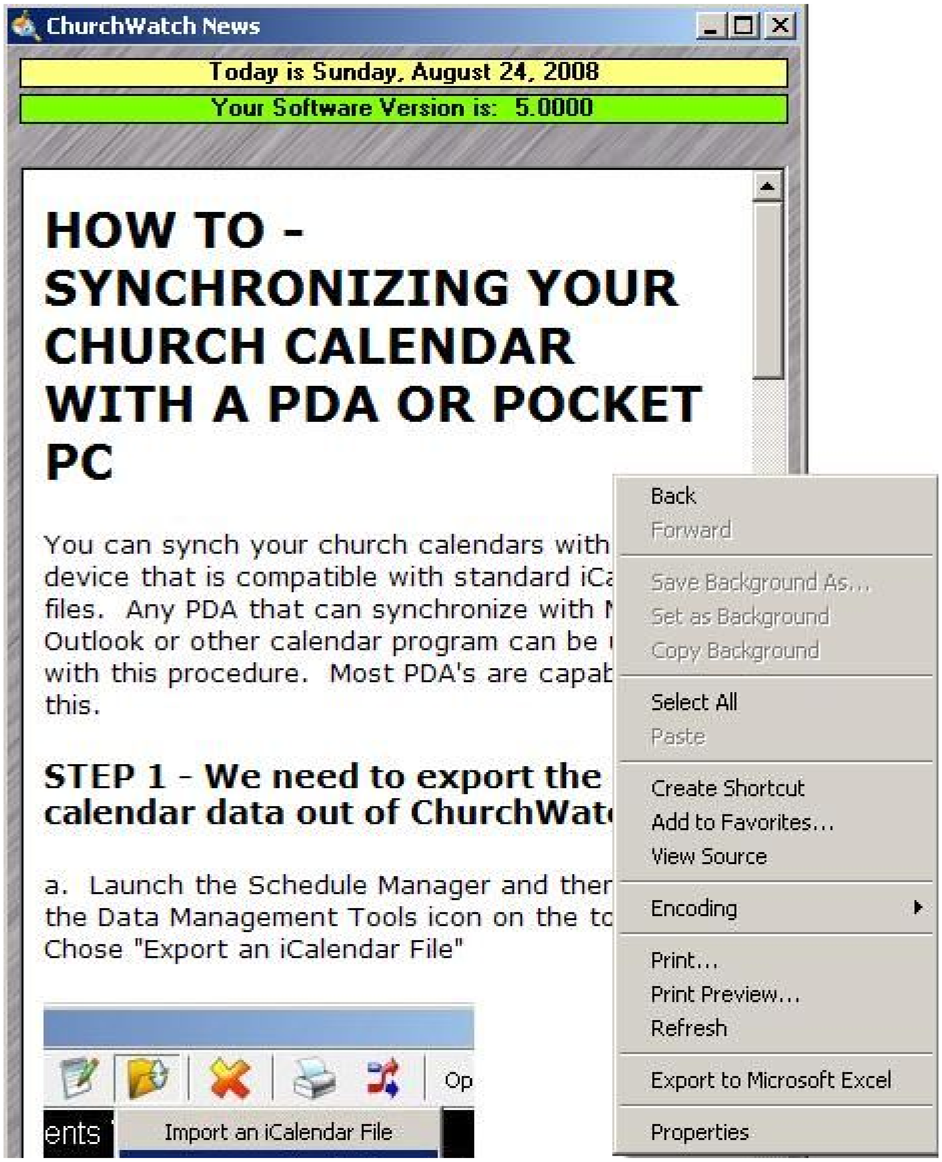



Figure 3-3 ChurchWatch News Right-Click Menu

Some of the more common commands:

| | |
|---|---|
| BACK | Select this to move back to a previous page |
| FORWARD | Select this to move forward to a previous page |
| ADD TO FAVORITES | Add this page to your internet explorer (or other browser) favorites |
| PRINT | Print the currently viewed page |
| PRINT PREVIEW | Print preview on screen before printing |
| REFRESH | Refresh/reload the current page |
| EXPORT TO MS EXCEL | Export the current page to Excel format (not usually useful) |
| PROPERTIES | See the properties of the current page |

***Note:*** *You can also right-click on pictures to bring up another list of options*.

# *Chapter 4 Setup and Maintenance*

Before using ChurchWatch for the first time you will need to enter your church's name and address and review some of the ChurchWatch setups. For convenience most ChurchWatch setups are done on one form. You can access the SETUP form from the main menu, from the top-of-screen menu under EDIT->PREFERENCES or from the Shortcut Toolbar.

The SETUP form also allows you to setup other preferences. Some of these are user-specific ("One User") while others will apply to all users ("All Users") of ChurchWatch. The SETUP form is organized into a series of pages. The following tables explain each of these pages.

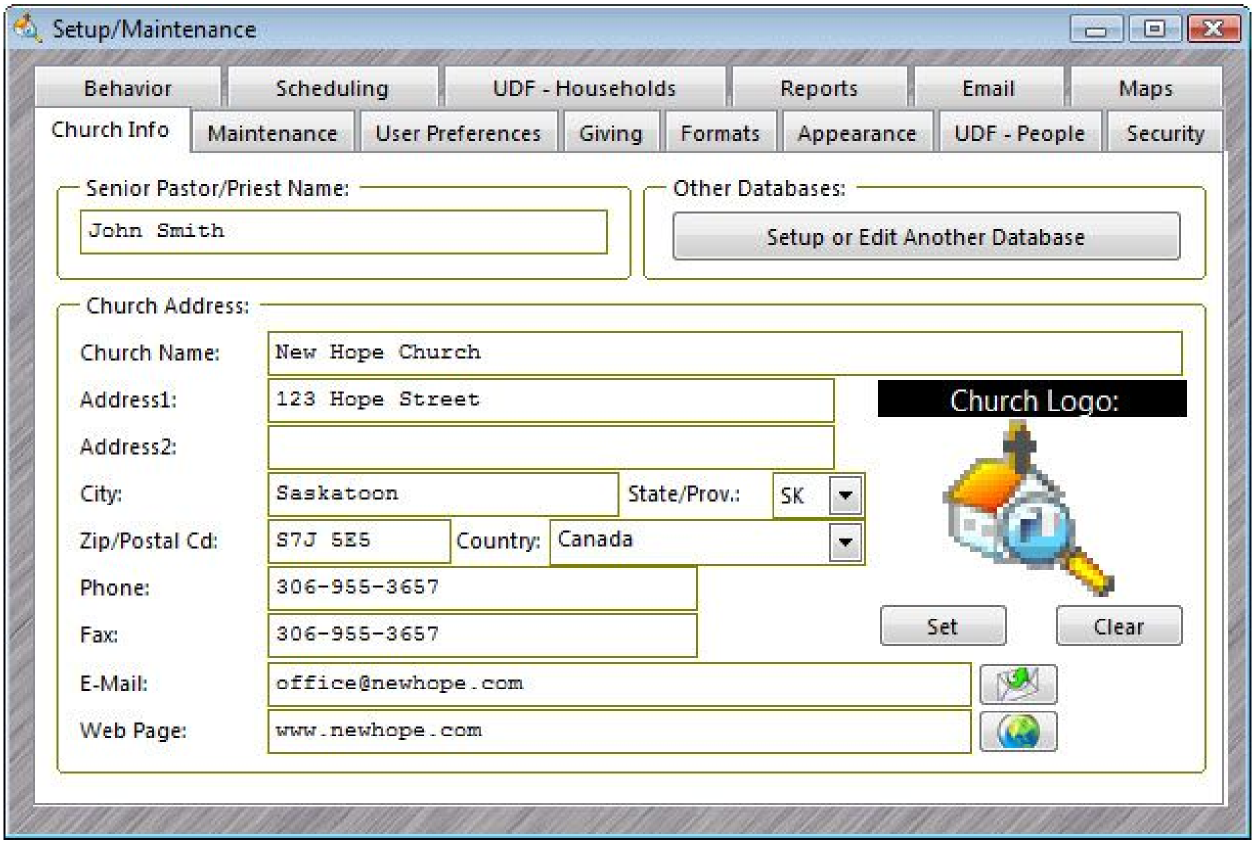



Figure 4-1 Setup Manager Form

## SETUP PAGE 1 - Church Info

| Item | Description | Applies To |
|---|---|---|
| Senior Pastor/Priest Name | Name of your pastor or priest. Presently this is used only on Registers Certificates. | All Users |
| Setup or Edit Other Another Database | Click this button to create another database. You can use this feature to handle data from multiple churches or just to create separate databases within your church (for Sunday School or Vacation Bible School for example). | All Users |
| Church Name | The name of your church. Your church name will be printed on reports. | All Users |
| Address1<br>Address2<br>City<br>State/Prov<br>Zip/Postal Cd<br>Country | The address of your church.<br>US State or Canadian Province. If this does not apply in your country you may simply enter 2-character text in this box as required.<br>The country your church resides in. You can choose from the countries in the list or enter a new country name if yours is not listed. The selection of this field affects the State/Prov field so enter this first. | All Users |
| Phone | Church's phone number. | All Users |
| Fax | Church's fax number. | All Users |
| Email | Your church's email address. | All Users |
| Web Page | Your church's web page URL. | All Users |
| Church Logo | If you have a church logo you can set it here (for use on reports). Use the SET button to indicate the file name of your logo file or use the CLEAR button to clear the logo from ChurchWatch. Your logo file must be in .BMP, .GIF or .JPG format.<br><br>Tip: White Mountain Software would be pleased to assist you in converting your church logo from paper to digital format. | All Users |

Table 4-1 Church Info Page

## SETUP PAGE 2 - Maintenance

Before selecting any maintenance functions you should perform a backup to protect your data. In addition, you should make sure that no one else is using ChurchWatch (click FILE-WHOS ON) since all database tables must be closed during maintenance. ChurchWatch will warn you if other users are online.

***Note:*** *If you have security turned on only the "admin" account is permitted access to the Maintenance page.*

| Item | Description | Applies To |
| --- | --- | --- |
| Perform a Backup | Launches the Backup Manager so you can do a backup before performing any maintenance functions. Always do a backup before selecting a maintenance function. | All Users |
| Re-Index Databases | Occasionally (recommend once per week minimum) you should re-index your database tables to optimize the performance of ChurchWatch. This function can also fix certain errors. If you notice odd behavior, missing data etc, a database re-index can often solve the problem. Before calling for support try clicking this button. | All Users |
| Pack Databases | When you delete a record on any of the ChurchWatch forms the record is not physically deleted, only marked for deletion. This is done so that you can undelete the record if desired. Choose Pack Databases to physically delete records and free up disk space. | All Users |
| Fix Corrupted Memo Files | Very rarely, usually after a power disruption, you may receive a "corrupted memo file error" while using ChurchWatch. To correct the problem, click this button. | All Users |
| Zap All Tables | CAUTION. This button deletes all data in all database tables. Note that the data cannot be recovered once zapped unless you have a good backup. | All Users |
| Reset SmartForms Data | Use this button to reset all SmartForms data. All sizes, positions and states of forms will be forgotten so that all forms revert back to original defaults. This is especially useful if a form is off-screen due to a change in screen resolution. | All Users |
| Repair House and People QuickSearch Lists | The QuickSearch lists in the Membership Manager are derived fields. You can regenerate and repair them at any time if necessary by clicking this button. Normally this is not necessary. | All Users |
| Mass Edit | Launches the Mass Edit Wizard to change large amounts of database data from one value to another | All Users |
| Default Backup Path | Use this field to set a default backup directory. The Backup Manager will always load this as the default disk drive and directory. Use the Browse button beside the field to choose a disk drive and directory. | All Users |

Table 4-2 Maintenance Page

## SETUP PAGE 3 - User Preferences

This page allows each user to customize ChurchWatch to their personal preferences.

| Item | Description | Applies To |
|---|---|---|
| Desktop Window Size on Startup | You have three choices for the startup size of the ChurchWatch desktop:<br><br>Normal: Window is sized normal<br>Minimize: Window is minimized onto the Windows Task Bar<br>Maximize: Window is maximized to use full screen<br><br>***Tip:*** *Put ChurchWatch in your START-PROGRAMS-STARTUP folder and set the window size to minimized to have ChurchWatch auto-start and sit on the Windows Task Bar whenever you turn on your computer.* | One User |
| Change Your Password | Use this button to change your login password. This button only appears if security is turned on. | One User |
| Show Family Photos on Household Form | If you are not using family photos you can uncheck this box. | One User |
| Show Person Photos on People Form | If you are not using person photos you can uncheck this box. | One User |
| Sound Effects | Check this box to turn on sound effects. | One User |
| Button Help Text | When this box is checked, ChurchWatch shows help text whenever you hover your mouse over a button. | One User |
| Notify on New Messages | When this box is checked, ChurchWatch will notify you when you receive a new inter-office message. Applicable only when security is turned on. | One User |
| Display Backup Reminder on Shutdown | When this box is checked, ChurchWatch will remind you to do a backup whenever you exit the program. | One User |
| Prompt on Deletes | When this box is checked, ChurchWatch will always ask if its ok to delete a record. We recommend leaving this checked. | One User |
| Show ‘ChurchWatch Today’ on Startup | When this box is checked, the ChurchWatch Today page is always loaded when the program starts. | One User |
| Minimize Main Menu Form on Startup | If you don’t use the main menu window, check this box to have it automatically minimized on startup. | One User |
| Auto Re-Index Tables On Exit | When this box is checked, ChurchWatch will automatically reindex your database tables when you exit (if no other users are online). | One User |
| Show ‘ChurchWatch News’ on Startup | When this box is checked, the ChurchWatch News page is always loaded when the program starts. | One User |
| Favorite Word Processor | Enter the path to your word processor’s .EXE file. This item is used by the Sermon Manager when editing a sermon file. | One User |

Table 4-3 User Preferences Page

## SETUP PAGE 4 - Giving

This page is used to setup preferences related to the Giving, Pledge and Tax Receipt Managers.

***Note:*** *If security is turned on, only users with access to the Giving Manager will be able to view this setup page.*

| Item | Description | Applies To |
|---|---|---|
| Charity Registration # | Certain countries, particularly Canada, require that churches and charities be registered for tax purposes. Enter your church's charity registration number here. This number is printed on income tax receipts and on Substantiation of Contributions reports (USA). | All Users |
| Last Receipt # Assigned | Each tax receipt printed by ChurchWatch has a serial number for auditing purposes. This setup field is the last tax receipt number printed. It cannot be altered although you can reset the number to zero by clicking the RESET TO ZERO button. We recommend you do not reset the last receipt number but if necessary it should not be done more than once per tax year or duplicate serial numbers will result. | All Users |
| Default Giving Account | Most churches have a giving account that is used more commonly than others. For example "Budget". First setup your giving account names (refer to chapter 6) and then set the default giving account here. When adding offering data the Giving Manager will always pick this account by default in an attempt to minimize your data entry effort. To clear the default account click the delete button beside the field. | All Users |
| CRA Website (Canada) | If your church is located in Canada, you are required by CCRA guidelines to include the CCRA website on all tax receipts. The CCRA website is defaulted to www.cra.gc.ca/charities but you can modify the website in this field if necessary. | All Users |
| Include CRA Website on Tax Receipts | Check this box to include the CCRA website on tax receipts. If your church is not located in Canada, uncheck this box. | All Users |
| Auto Load Prior Giving Patterns (Master Enable) | Check this box to have the Giving Manager seek and automatically set the account and amount boxes based on a person's last giving when doing postings. This is very useful since many people follow a tithing pattern that repeats week to week. Use this feature to reduce data entry. This is the "master" enable switch. In addition, the auto-load status for EACH PERSON can be set on the GIVING page of the Membership Manager. Unchecking this box disables the auto load feature entirely regardless of the auto-load setting of each person. | All Users |
| Fiscal Year End | Enter the last date of your churches fiscal year here. This value is used in the fiscal year reports. | All Users |

<table>
<tr><th>Item</th><th>Description</th><th>Applies To</th></tr>
<tr><td>Tax Receipt Digitized Signature</td><td>Tax receipts (Canada) and the Substantiation of Contributions report (USA) both permit a digitized signature to simplify the tax reporting process. Three buttons are provided here:<br><br>SET SIGNATURE FILE: Click this to select a .BMP, .JPG or .GIF file that contains your digitized signature.<br><br>CLEAR: Click this to clear the signature file.<br><br>TEST: Click this to see what the signature would look like on a tax receipt.<br><br>Tip: When creating your signature file use a dark, thick felt pen and then scan at high quality. White Mountain Software would be pleased to assist you in scanning your signature.</td><td>All Users</td></tr>
</table>

Table 4-4 Giving Page

## SETUP PAGE 5 - Formats

This page allows you to setup ChurchWatch's auto formatting features.

| Item | Description | Applies To |
|---|---|---|
| Date Format | Select the date format you would prefer to use. Examples are given with each. | All Users |
| Default Postal Code/Zip | This item is useful for reducing the amount of data entry you need to do when entering addresses. You can enter the first few characters of the zip code or postal code for your area. ChurchWatch will automatically enter these prefix characters whenever you create a new church family in the MEMBERSHIP MANAGER. | All Users |
| Currency Symbol | ChurchWatch uses a default currency symbol of "$" which may not be correct for your country. You can set a single character currency symbol in this field. | All Users |
| Auto Formatting | This box contains several options for auto formatting names and list items. To keep your data tidy we highly recommend selecting an auto format style for each of the items listed. You have three choices:<br><br>No Auto Formatting: Entered items are left as-is (e.g. "smith")<br><br>Initial Caps: Entered items are auto converted to initial capital letters (e.g. "Smith")<br><br>All Caps: Entered items are auto converted to all capitals (e.g. "SMITH")<br><br>Note that there are FORMAT ALL NOW buttons for each. Click this button to cause ChurchWatch to reformat all stored data immediately.<br><br>***Tip:*** *If you have a name or list item that ChurchWatch has trouble auto-formatting you can set this option to No Auto Formatting, enter the name or list item and then reset this setup item to the desired format. Your entered name or list item will remain as-entered as long as you do not re-select the entry field.*<br><br>***Note:*** *Register data is not affected by auto formatting.* | All Users |

Table 4-5 Formats Page

## SETUP PAGE 6 - Appearance

This page allows you to setup the overall look and feel of the ChurchWatch program itself.

| Item | Description | Applies To |
|---|---|---|
| Item List | Begin by selecting an item in the list on the left. | One User |
| Detail Window | Change settings using the prompts in the panel at the right. | One User |
| Themes | "Themes" are pre-defined sets of ChurchWatch appearance settings. ChurchWatch provides several themes that you can select from using the pull down list box in this window. In addition you can create and maintain you own themes using the buttons SAVE AS, SAVE and DELETE:<br><br>SAVE AS Use the SAVE AS button to save your current settings under a new theme name.<br><br>SAVE Use the SAVE button to save your current settings under the current theme name. This modifies the current theme.<br><br>DELETE Use the DELETE button to delete a user defined theme. You cannot delete the default ChurchWatch theme.<br><br>***Tip:*** *When using Windows Vista, we recommend that you chose the "Vista" theme.* | One User |

Table 4-6 Appearance Page

## SETUP PAGE 7 - User Defined Fields, Membership Manager, People Level

The "UDF – People" page allows you to set the titles used for user defined fields in the Membership Manager. These field names will be used in the Membership Manager, in data filters and in ChurchWatch reports.

| Item | Description | Applies To |
|---|---|---|
| Character Fields | Six user defined character (text) fields are supported. Enter the titles here. | All Users |
| Numeric Fields | Three numeric fields are supported. Enter the titles here. | All Users |
| Checkbox Fields | Three logical (true/false) checkbox fields are supported. Enter the titles here. | All Users |
| Phone | Two additional phone numbers are supported. Enter the titles here. | All Users |

Table 4-7 User Defined Fields, People Page

## SETUP PAGE 8 - Security

Security is discussed in more detail in the Security chapter.  Here is a summary of the security page on the SETUP form:

| Item | Description | Applies To |
|---|---|---|
| User List | This list shows all currently defined user names. | N/A |
| New User | Click NEW USER to add a new user name. | N/A |
| Edit | Click EDIT to edit the name, password and/or access privileges for a user. | N/A |
| Delete | Click DELETE to delete a user name. | N/A |
| Disable All Security | When this box is checked, security is turned off but this is definitely not recommended.  When security is turned off you will not be required to login when ChurchWatch starts.  In addition, certain features of ChurchWatch such as the Message Manager will not be accessible.<br><br>***Note:*** *White Mountain Software strongly recommends that you leave security turned on.  Your government's laws may in fact require that church records are protected.* | N/A |
| Clear Online Flags | If the list of user's online in FILE-WHOS ON shows more users than you know are logged on click this button to clear ChurchWatch's records of who is online.  This may be required in the event of a power outage or PC crash while ChurchWatch is in use, however ChurchWatch also clears the online flags automatically. | N/A |

Table 4-8 Security Page

## SETUP PAGE 9 - Behavior

You can change the behavior of ChurchWatch using the items on this page.

| Item | Description | Applies To |
|---|---|---|
| Auto-Set City When Adding New Families | Check this box to have the Membership Manager automatically set the city for you when new families are added. The church's city is used. | All Users |
| Auto-Set State/Province When Adding New Families | Check this box to have the Membership Manager automatically set the state or province for you when new families are added. The church's state or province is used. | All Users |
| Print Child's Last Name in Directories if Different From Contact's Last Name | Check this box to modify directory reports as described. | All Users |
| When Entering Report Manager Auto Select Favorites | Check this box to have each user's favorite reports list shown when the Report Manager is started. When unchecked, the Report Manager starts with the attendance reports list showing. | All Users |
| When Adding People Try to Guess the Gender | Check this box to have the Membership Manager auto-set the gender of each individual entered. First person is male, second is female and all following are male. | All Users |
| When Adding New Families, Automatically Place Them in the Church Directory | Check this box to have all new households automatically placed in the church directories. | All Users |
| When Adding New Families, Automatically Include Spouse Name on Tax Receipts | Check this box to have all new households automatically include spouse name on tax receipts. | All Users |
| Allow for Bilingual (English/French) tax receipts and Registers Certificates. | If you are located in the USA or any country that does not use French you can uncheck this box to remove the multi-language features of ChurchWatch. | All Users |
| Show Middle Names in Membership Manager QuickSearch List | Check this box to show middle names in the QuickSearch list in the Membership Manager. We recommend that you leave this checked since the QuickSearch data is used in other places such as the Giving Manager, Pledge Manager and reports. | All Users |

Table 4-9 Behavior Page

## SETUP PAGE 10 - Scheduling

This page is used to adjust the behavior of the Schedule Manager.

| Item | Description | Applies To |
|---|---|---|
| Check For Scheduling Conflicts | This is a “master switch” for all users. When turned on, conflict checking will occur whenever you add a new event or modify the scheduling of an event. The software will check for scheduling conflicts for people, resources and facilities. | All Users |
| Event Scheduling Operates in Semi-Private Mode | Semi private mode is explained in the Schedule Manager chapter. In semi-private mode, users cannot modify or delete events created by other users. | All Users |
| Class Scheduling Operates in Semi-Private Mode | Semi private mode is explained in the Schedule Manager chapter. In semi-private mode, users cannot modify or delete events created by other users. | All Users |
| Visit Scheduling Operates in Semi-Private Mode | Semi private mode is explained in the Schedule Manager chapter. In semi-private mode, users cannot modify or delete events created by other users. | All Users |
| Send Email Reminders From This User Account | Email reminders for events can be automatically sent by the software. This is explained in more detail in the Schedule Manager chapter. Select the user id that will send the emails. Usually this is the “admin” user. | All Users |
| Automatic Data Purge | The Schedule Manager creates a lot of data, especially when using recurring events. It is recommended that you purge data once in awhile. You can setup for an automatic purge by selecting this option and indicating the number of days you want to keep in the database. | All Users |
| Manual Data Purge | Similar to the automatic purge but when this option is selected you must manually do the purge yourself by clicking on the Purge Now button. | All Users |
| When Purging Delete the Classes-Taught History… | Check this box to also purge classes-taught history for teachers. Normally this would not be checked since you likely want to keep the teaching history. | All Users |

Table 4-10 Scheduling Page

## SETUP PAGE 11 - User Defined Fields, Membership Manager, Household Level

This page allows you to set the titles used for user defined fields in the Membership Manager, Household level. These field names will be used in the Membership Manager, in data filters and in ChurchWatch reports.

| Item | Description | Applies To |
|---|---|---|
| Character Fields | Two user defined character (text) fields are supported. Enter the titles here. | All Users |
| Numeric Fields | Two numeric fields are supported. Enter the titles here. | All Users |
| Checkbox Fields | Two logical (true/false) checkbox fields are supported. Enter the titles here. | All Users |

Table 4-11 User Defined Fields, Household Page

## SETUP PAGE 12 - Reports

This page allows you to modify ChurchWatch report files that don't appear in the Report Manager.

| Item | Description | Applies To |
|---|---|---|
| Open Report File Outputs in the Appropriate External Program.... | ChurchWatch is capable of outputting reports to several formats. Check this box to have the report open in the appropriate external viewer (for example Adobe PDF Reader, Microsoft Word etc) | One User |
| When Viewing On Screen, Use Report Viewer With Search Capabilities | ChurchWatch has two report viewers. The default viewer runs faster but has no search capabilities. Check this box to get a report viewer with search capabilities. | One User |
| Report List | Select the report you want to modify or restore from this list. | All Users |
| Modify Layout | Click this button to modify the layout of the selected report. For information on modifying reports, refer to the Report Manager chapter. | All Users |
| Restore Original | Whenever you modify the layout of a report, a backup copy of the original is automatically saved for you in the folder "Original Report Backups". If you create errors during the modification of the report you can always restore the original backup by clicking this button. Never delete the "Original Reports Backup" folder. | All Users |

Table 4-12 Reports Page

## SETUP PAGE 13 - Email

This page allows you to select an email method and setup the details. Two different email protocols are supported: MAPI and SMTP. Each has its own pros and cons. MAPI uses your email program (such as Outlook Express) to send email. The advantage is simplicity - you have already set up your email program and ChurchWatch simply uses the services of it. There are several disadvantages:

- MAPI will leave messages in the outbox of your email program (when using bulk email for example, this could be hundreds of copies of the same message).
- MAPI is not always reliable, depending on the settings of your Windows installation and your email program
- Some email programs have to be MAPI enabled with an internal setup, otherwise MAPI requests are blocked (Outlook for example).
- MAPI does not allow good error checking from within ChurchWatch

Despite these disadvantages, MAPI is simple and requires no additional setup.

The other protocol is SMTP. SMTP is more complicated but is capable of sending email transparently without the use of an external email program. This allows ChurchWatch to send email on its own. The advantages are reliability, no messages in your outbox and good error checking and reporting. The disadvantage is that SMTP requires a bit more setup. The rest of the items on this setup page apply directly to the SMTP selection (refer to table 4-13). Based on this information, select one of the protocols. If your selection is causing problems or it is not possible to send email, try the other protocol.

| Item | Description | Applies To |
|---|---|---|
| Automatically call up the Windows Internet Dialer | Check this box if you use a dial-up internet connection. It will cause the dialer dialog to be displayed automatically when needed. | One User |
| Internet Mail Server Name for Outgoing Email | Name of your ISP's mail server for outgoing (sent) email. | One User |
| Your Email Address | Enter your full email address in this field | One User |
| Sender Name | Enter the name you want the receiver of the email to see in the 'from' field. Typically this is just your name (eg Jane Doe). | One User |
| Use SMTP Authentication<br>ISP Login Name<br>ISP Password | Check this box only if your ISP (Internet Service Provider) requires SMTP authentication. Normally this will not be required. If your ISP requires it, check this box and also enter your ISP login name and password. You can acquire this information from your ISP if you are not sure. | One User |

Table 4-13 Email Page

## SETUP PAGE 14 - Maps

ChurchWatch Version 5 has the capability of doing real-time map lookups in the Membership Manager. You can enable this feature and adjust some of the behavior on this setup page. When enabled, maps will appear on the "Map" page of the Membership Manager and will be automatically updated anytime a new household is selected. You can further adjust the options as shown in table 4-14 below.

| Item | Description | Applies To |
|---|---|---|
| Map Provider | You can choose one of several map web sites to go to for map lookups. Some of these require scrolling once the page is displayed, others do not allow scrolling. Choose the site that is most useful for you. | One User |
| Auto Map Refresh | Check this box to enable real-time map lookups in the Membership Manager. The map will appear on the Map page anytime a new household is selected. | One User |
| Launch Web Browser For Manual Lookups | If this item is checked, your web browser will be launched when you click the "sign post" buttons in the Mail Manager to do a manual map lookup. When this item is not checked, the map will appear on the Map page of the Membership Manager instead. | One User |
| Use Full Address Lookup | Normally, leave this item unchecked. If you are having problems with map accuracy, try turning on this option. | One User |
| Default Country Code | If you are not located in the USA or Canada, you may have to enter your 2 character ISO country code in this box. Also, in the USA or Canada, if you are having problems with map accuracy try entering your country code here – US for USA or CA for Canada. This default country code will be used if the household in the Membership Manager has no country associated with it. | One User |
| Map Zoom Level | You can adjust the initial map zoom level with this slider bar. Note however, that several of the map providers do not support this. Some experimentation may be required. We recommend a value above 50%. | One User |

Table 4-14 Maps Page

***NOTE:*** *Map data is copyright © the provider chosen.*

***TIP:*** *For addresses outside the USA and Canada, we recommend using Multi-Map as your provider.*

***NOTE:*** *The map provider list is subject to change at any time.*

# *Chapter 5 Import and Export Managers*

Data can easily be imported from your existing database system into ChurchWatch. You can also export data stored in ChurchWatch. Many popular file formats are supported. The Export Manager is also used to export giving data into popular accounting packages such as QuickBooks, Quicken and Simply Accounting.

## Loading Data Into ChurchWatch - The Import Manager

You must proceed carefully when importing data into ChurchWatch and careful planning is important. ChurchWatch uses Microsoft Visual Foxpro's Import facility and no data validation is done. As such, you can create problems if you attempt to load a field that is of the wrong data type (e.g. a text field loaded into a numeric field for example). White Mountain Software intends to correct this limitation in future versions of ChurchWatch. Even with this limitation, the Import Manager is an extremely powerful tool to easily and quickly load your existing data into ChurchWatch.

Note that data you import is always appended to the existing ChurchWatch tables. That means that you can add data using the Import Manager at any time without disrupting the data you already have stored in ChurchWatch, but you cannot add data to existing records.

## Planning and Preparing for the Import

This is a very important step. Carefully plan your import by doing four things:

1. Examine your existing data and the ChurchWatch table structures listed in Appendix A to determine which of your fields can be properly imported into ChurchWatch. Take note of the type of field ChurchWatch can accept (numeric, character, logical etc).

2. Choose the file type you want to import from. ChurchWatch supports:

- Comma delimited text file (.TXT) (BEST CHOICE)
- Blank delimited text file (.TXT)
- Semi-Colon delimited text file (.TXT)
- Tab delimited text file (.TXT)
- Foxpro (and Xbase) DBF file (.DBF)
- Microsoft Excel files (V2-V4, V5, V7) (.XLS)
- Lotus Symphony file (.WRK, .WR1)
- Lotus 1-2-3 file (.WKS, .WK1)
- Symbolic link (.SLK)
- System Data Format (SDF)
- Microsoft Multiplan (.MOD)
- Visicalc (.DIF)
- Framework II (.FW2)
- Paradox (.DB)
- Rapidfile (.RPD)

3. Decide on how to uniquely define each family. You can use a numeric family id or a family name but since many families have the same last name and since members of the same family may have different last names, we recommend assigning a temporary family id code to each family. Each person in the family should have the same numeric family ID code. Note that ChurchWatch will replace these temporary family IDs with new ones of its own choosing.

4. Create a file of the chosen file type using your existing Church Management software, database or some other software. Use only the fields you chose in step 1 and take note of the order of the fields in the file. Append your temporary family ID code if necessary during this step.

In our example, we are going to use a comma delimited text file to import two families. Refer to Appendix A and study the fields we have chosen. We have chosen the following fields in the following order:

1. Family name (family_nam of HOUSE table)
2. First name (first_name of PEOPLE table)
3. Authority (record_lev of PEOPLE table, where 1=Contact, 2=Spouse, 3=Child)
4. Address1 (address1 of HOUSE table)
5. City (city of HOUSE table)
6. Phone (housphone1 of HOUSE table)
7. Directory (directory of HOUSE table)

Here is the sample data we are going to use. We want to import two families. The Smith family will be placed into the church directory while the Peters family will not.

```
"Smith","Joe",1,"123 Elm Street","Anytown","555-1212",T
"Smith","Helen",2,"123 Elm Street","Anytown","555-1212",T
"Smith","Johnny",3,"123 Elm Street","Anytown","555-1212",T
"Smith","Cindy",3,"123 Elm Street","Anytown","555-1212",T
"Smith","Amanda",3,"123 Elm Street","Anytown","555-1212",T
"Peters","Eldon",1,"123 Any Street", "Anytown","111-2222",F
"Peters","Shiela",2,"123 Any Street", "Anytown","111-2222",F
"Peters","Tommy",3,"123 Any Street", "Anytown","111-2222",F
```

***Tip:*** *Notice that blanks are not allowed in the input file unless inside quotations. Notice the T and F indicators (with no quotes) at the end of each record. T stands for TRUE and F stands for FALSE and they will be used to set the directory field which is a logical field (has a value of TRUE or FALSE only). For ChurchWatch logical fields you MUST use T or F with no quotes in order for the import to be successful.*

***Tip:*** *Date fields must have 4 digit years and be in exactly the same format as you have chosen for ChurchWatch (SETUP-FORMATS). In addition, if you are using a text file as the input source, the date fields should not be in quotes.*

As already mentioned, using a family ID code is a better method for import so lets add a numeric family ID to the start of each record:

```
1,"Smith","Joe",1,"123 Elm Street","Anytown","555-1212",T
1,"Smith","Helen",2,"123 Elm Street","Anytown","555-1212",T
1,"Smith","Johnny",3,"123 Elm Street","Anytown","555-1212",T
1,"Smith","Cindy",3,"123 Elm Street","Anytown","555-1212",T
1,"Smith","Amanda",3,"123 Elm Street","Anytown","555-1212",T
2,"Peters","Eldon",1,"123 Any Street", "Anytown","111-2222",F
2,"Peters","Shiela",2,"123 Any Street", "Anytown","111-2222",F
2,"Peters","Tommy",3,"123 Any Street", "Anytown","111-2222",F
```

Now that the input file is complete and has been checked we are ready to begin the import.

### Step 1 - Choose the Import Type

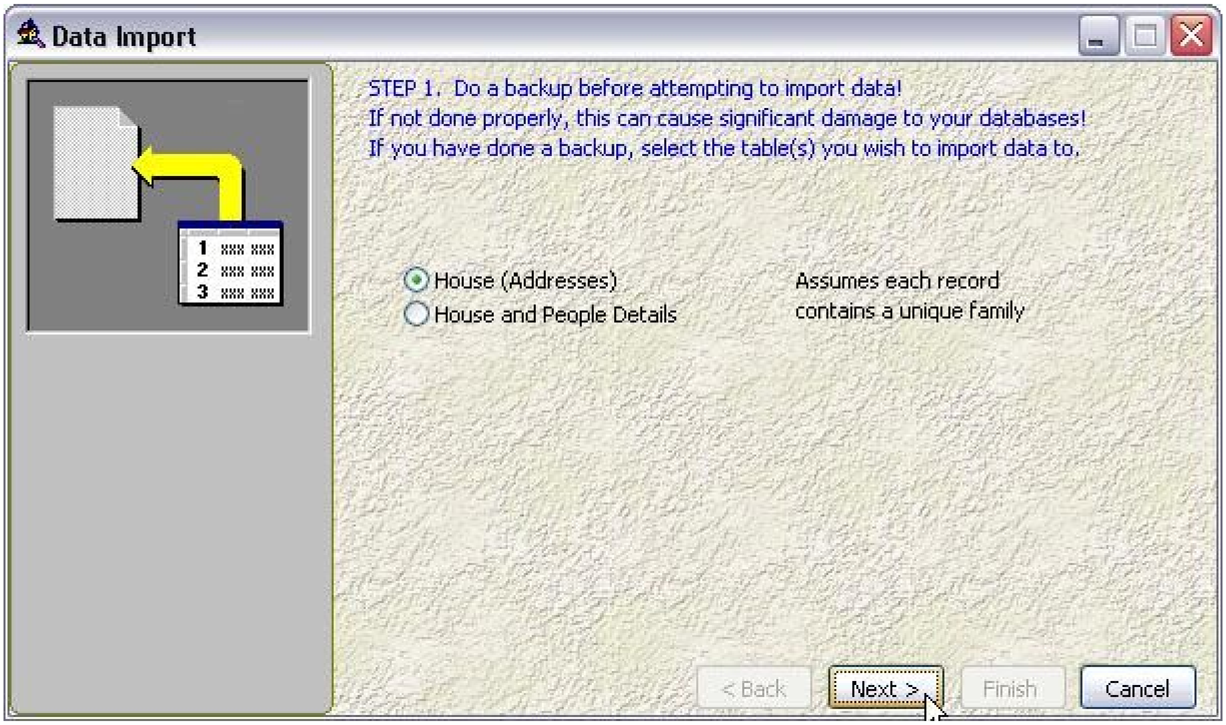



Figure 5-1 Step 1 – Choosing the Import Type

You have two choices for the import type. If you are simply importing family names and addresses choose the “House” option. If you are importing any fields that are contained in the PEOPLE table choose the “House and People Details” option. In this example we are importing fields that are contained in the PEOPLE table so we choose “House and People Details”.

Since we are using a Family ID instead of Family Name as the key we need to check the “Use Family ID in Import File as Key” checkbox.

Click the NEXT button to move to the next step.

## Step 2 - Choose the Fields

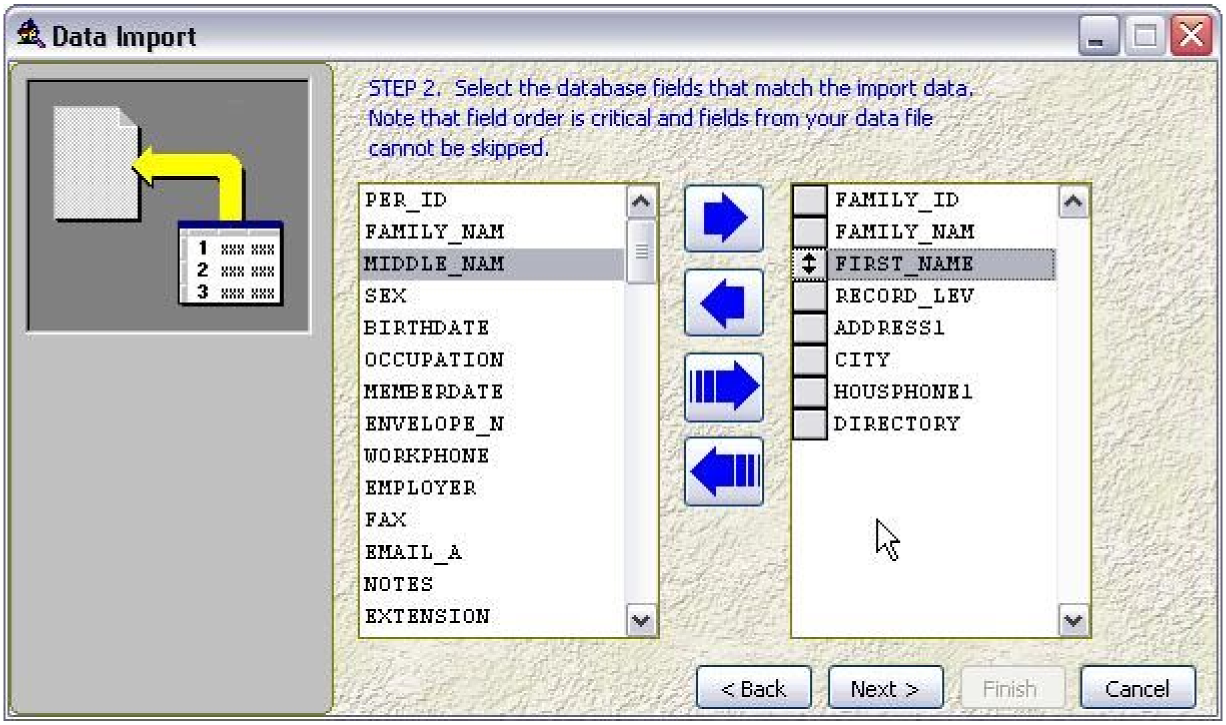



Figure 5-2  Choosing the Fields

Next, choose the fields you are going to import into ChurchWatch from the list at the left. Move your chosen fields to the list on the right using the arrow buttons. Note that the order is very important and must exactly match the order of the fields in your input data file. If you make a mistake in the ordering, you can click and drag on the square boxes on the left side of the right hand list to reorder the items.

You may not skip fields in the input data file. The above figure shows the fields in our example input file in the correct order with no skipped fields.

If you choose an incorrect field name you can use the left facing arrows to move fields back to the main list but take note that they will be added back at the bottom of the left hand list.

Click the NEXT button to move to the next step.

## Step 3 - Select File Type and Name

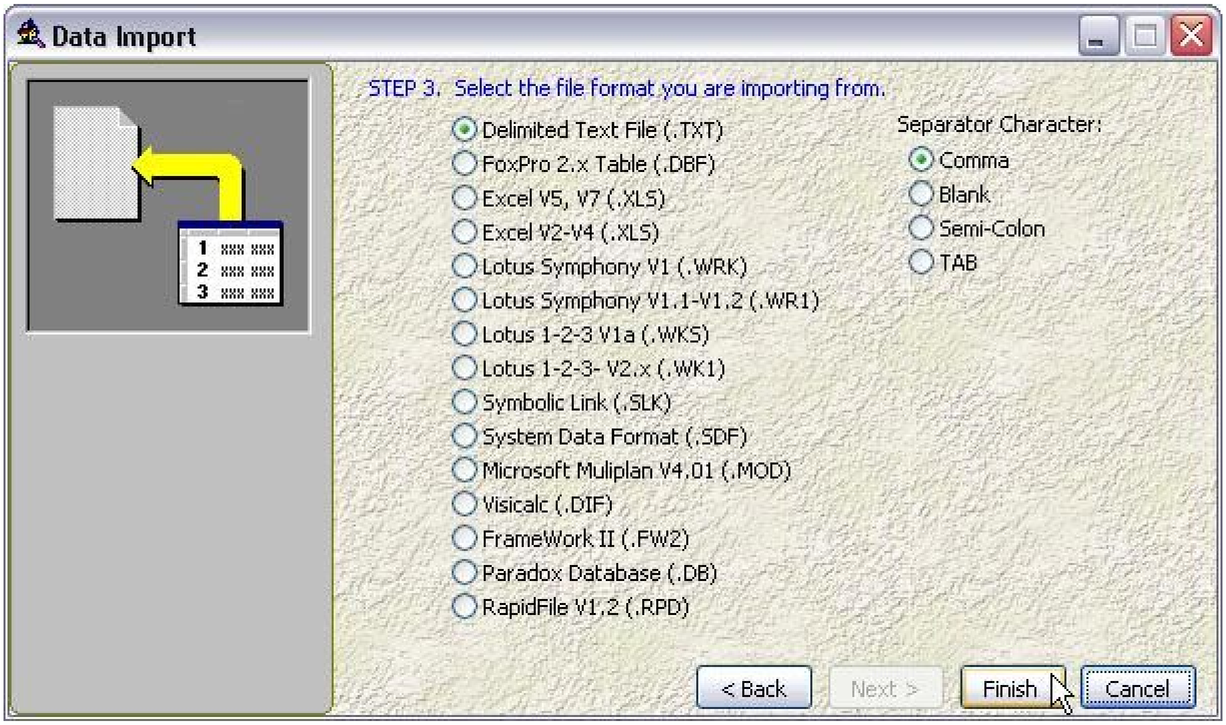



Figure 5-3 Choosing the File Type and Name

Next, set the file type for your input file. If the input file is a text file, as it is in this example, you must also choose the delimiter type. The “delimiter” is the character used to separate input fields. Choose one of comma, blank, semi-colon or tab. Our example is a comma delimited text file.

Click the FINISH button to move to the next step. The Import Manager will prompt you for the name of the file you are using for an input file. Use the displayed dialog box to select your file.

## Step 4 - Review the Results and Commit the Data

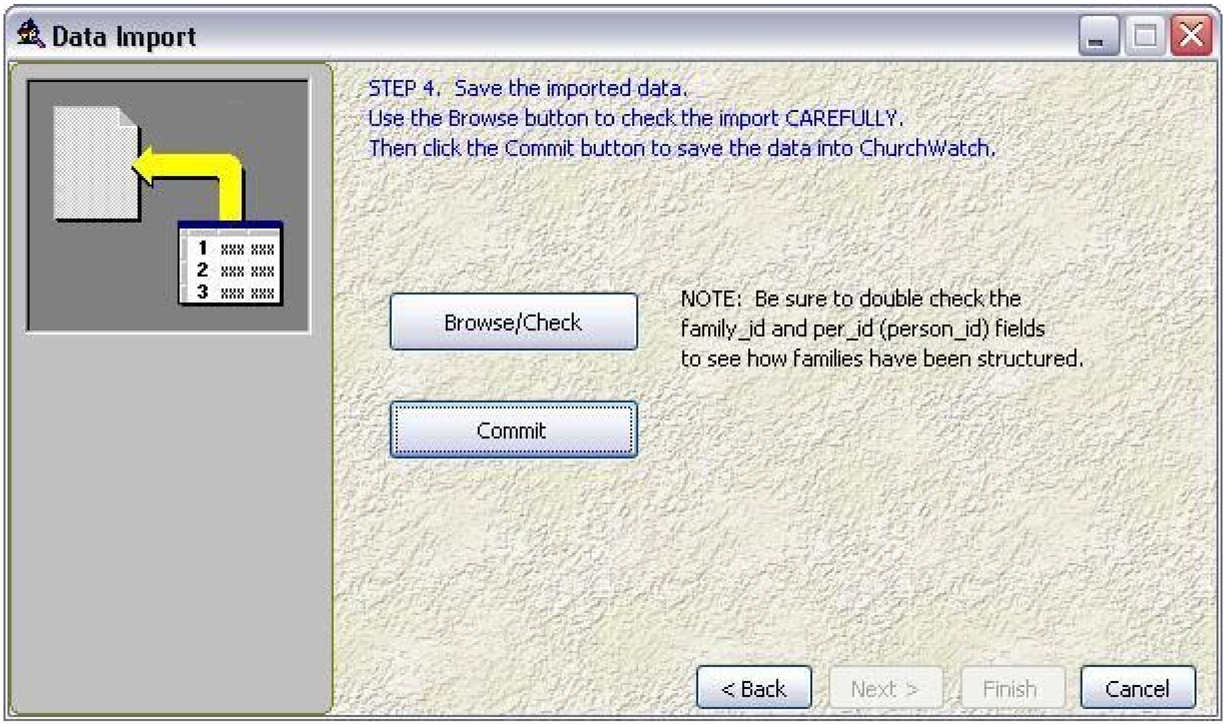
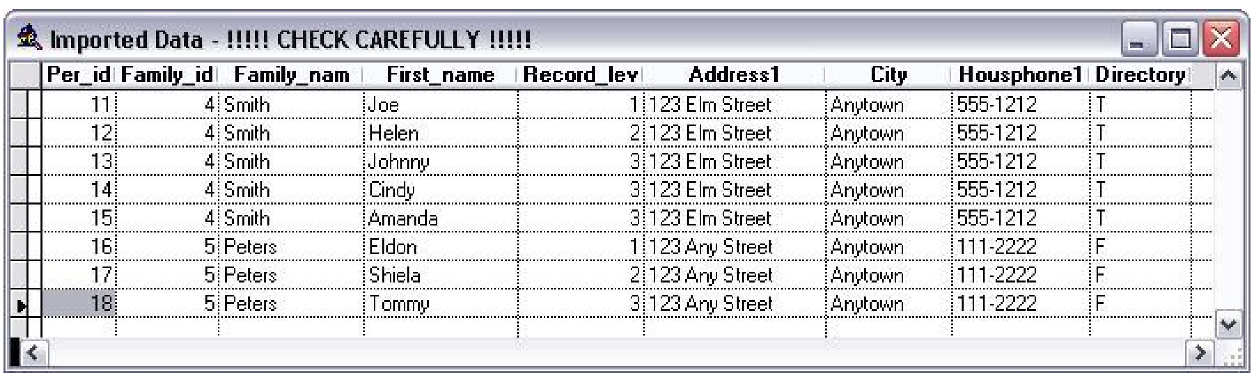



Figure 5-4 Reviewing Results and Committing the Data

The Import will be performed and the page shown above will be displayed. Click the BROWSE/CHECK button to view the results of your import. Be sure to double check the way that the Import Manager has grouped the families in the input file:


Imported Data - !!!!! CHECK CAREFULLY !!!!!

| Per_id | Family_id | Family_nam | First_name | Record_lev | Address1 | City | Housphone1 | Directory |
|---|---|---|---|---|---|---|---|---|
| 11 | 4 | Smith | Joe | 1 | 123 Elm Street | Anytown | 555-1212 | T |
| 12 | 4 | Smith | Helen | 2 | 123 Elm Street | Anytown | 555-1212 | T |
| 13 | 4 | Smith | Johnny | 3 | 123 Elm Street | Anytown | 555-1212 | T |
| 14 | 4 | Smith | Cindy | 3 | 123 Elm Street | Anytown | 555-1212 | T |
| 15 | 4 | Smith | Amanda | 3 | 123 Elm Street | Anytown | 555-1212 | T |
| 16 | 5 | Peters | Eldon | 1 | 123 Any Street | Anytown | 111-2222 | F |
| 17 | 5 | Peters | Shiela | 2 | 123 Any Street | Anytown | 111-2222 | F |
| 18 | 5 | Peters | Tommy | 3 | 123 Any Street | Anytown | 111-2222 | F |

Figure 5-5 Checking the Results

Study the results in Figure 5-5. Notice that the data has been correctly imported. Also notice that the family ID fields from our example input file have been changed. ChurchWatch assigns its own family IDs.

***Tip:*** *Blank records in the import are caused by blank lines in the input file or by a carriage return at the end of the file. You have a choice of correcting the input file and redoing the import or leaving the import results as-is and deleting the blank family in the Membership Manager later.*

Although the data in the import results shows many repeated fields, such as the address field, ChurchWatch actually stores the data much more efficiently. In our example, only two (2) family records will be created with five (5) People records in the “Smith” family and three (3) People records in the “Peters” family.

Finally close the browse window and click the COMMIT button to commit the imported data into ChurchWatch. Once you have successfully imported data into ChurchWatch you should go to the SETUP->FORMATS page and format all data as desired using the FORMAT ALL NOW buttons.

## Summary and Items of Note

Note the following:

- Giving data cannot be imported into ChurchWatch since there is a complex relationship between giving records and household (address) information.
- Use the BACK buttons if you make a mistake during the import process and need to redo a step
- Blanks are not allowed in .TXT input files unless between quotes (“”)
- You must use a family id or family name to group families
- Field order is critical
- You cannot skip fields in the input file unless they are at the end of the record
- Never import data to the PDIRECTORY field of the PEOPLE table. Choose the DIRECTORY field in the HOUSE table instead. ChurchWatch will automatically fill in the PDIRECTORY field for you.
- Importing marital status or title fields will update the appropriate lists in ChurchWatch
- ChurchWatch logical fields must be imported as T or F with no quotes
- Date fields must have 4 digit years and be in exactly the same format as you have chosen for ChurchWatch (SETUP->FORMATS). In addition, if you are using a text file as the input source, the date fields should not be in quotes.
- Blank lines in the input file cause blank records to be imported
- Do not use header records in the input file. Spreadsheet output files should be checked for a header record and if one exists it should be deleted.

## Copying Data Out of ChurchWatch - The Export Manager

You can easily export your data into many different file formats using the Export Manager. You can export Household, People or Giving data. The Export Manager can also export your giving data into a QuickBooks, Quicken or Simply Accounting file. This is an excellent way to extract your giving information for use in many different accounting software packages since most will read QuickBooks files.

## Step 1 - Choose the Data to Export

To start the Export Manager select FILE->EXPORT from the top-of-screen menu. The following page will be displayed:

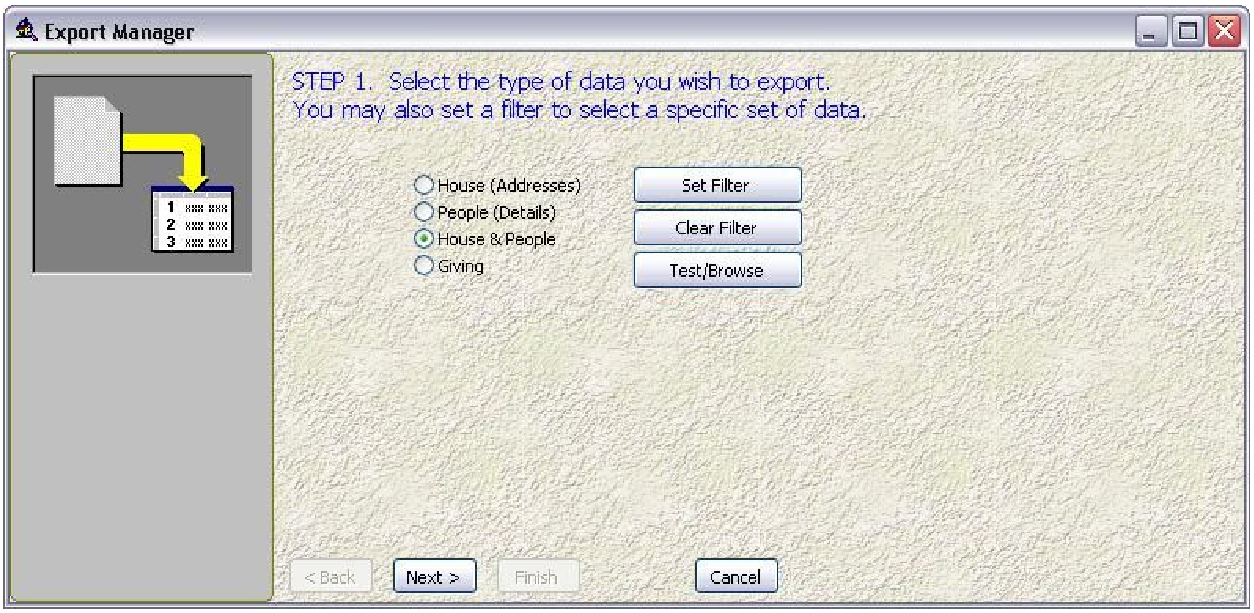



Figure 5-6 Choosing the Data to Export

Select the type of data you want to export. You may also set a data filter (refer to Chapter 29) by clicking the SET FILTER button. Use the TEST/BROWSE button to review the data you have selected (note you will have an opportunity to select specific fields in the next step). Once you are satisfied with what you have selected, click the NEXT button. In the example above, we have chosen to export House and People fields.

The Giving export selection is a special case and will be covered later in this chapter.

## Step 2 - Choose Specific Fields

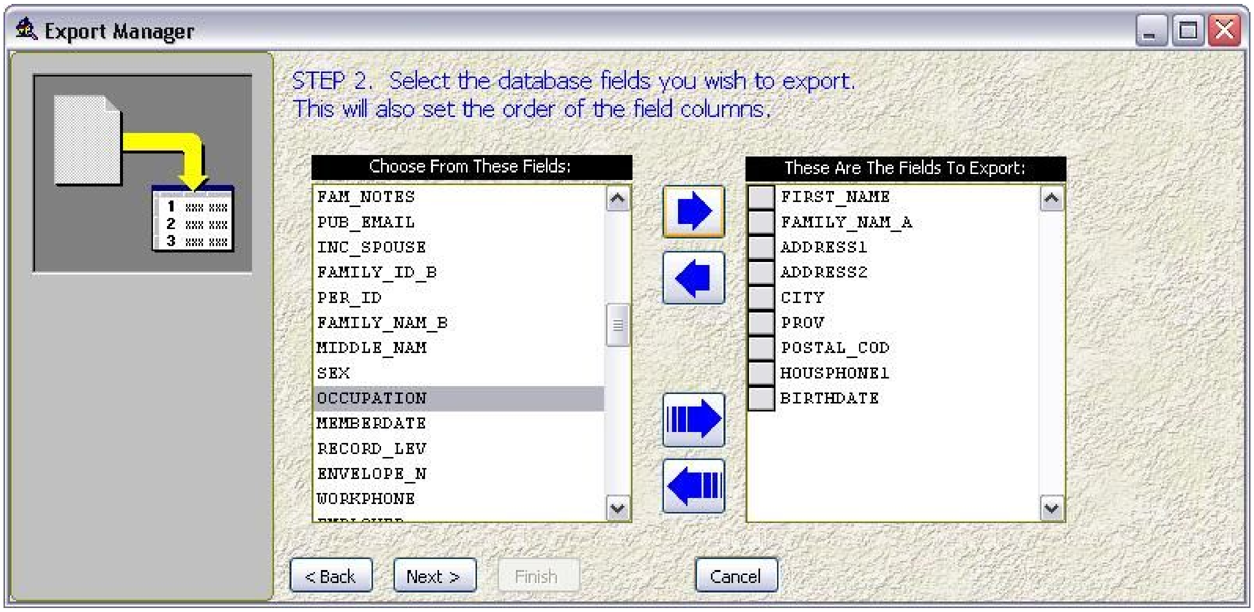



Figure 5-7 Choosing Specific Fields

In this step you need to choose the specific data fields you are interested in exporting. The fields will be placed in the output field in the exact order that you select them. Use the arrow buttons to move fields from the master list at the left to the selection list at the right. In the example above we have chosen person's first name, the family name from the House table (see note below), the person's address and birth date. You can reorder your selections by clicking and dragging on the square buttons in the right list box. When you are satisfied with your selections and their order click the NEXT button.

***NOTE:*** *When "House & People" is selected in step 1, there are several data fields with the same name in the HOUSE and PEOPLE tables. These will show up in the master field list as FAMILY_NAM_A, FAMILY_NAM_B, FAMILY_ID_A, FAMILY_ID_B etc. The "_A" fields are from the HOUSE table and the "_B" fields are from the PEOPLE table. Take care when selecting these fields.*

### Step 3 - Choose a File Type

Finally, you must choose the type of file you would like to export the data to. The Export Manager supports many different file types.

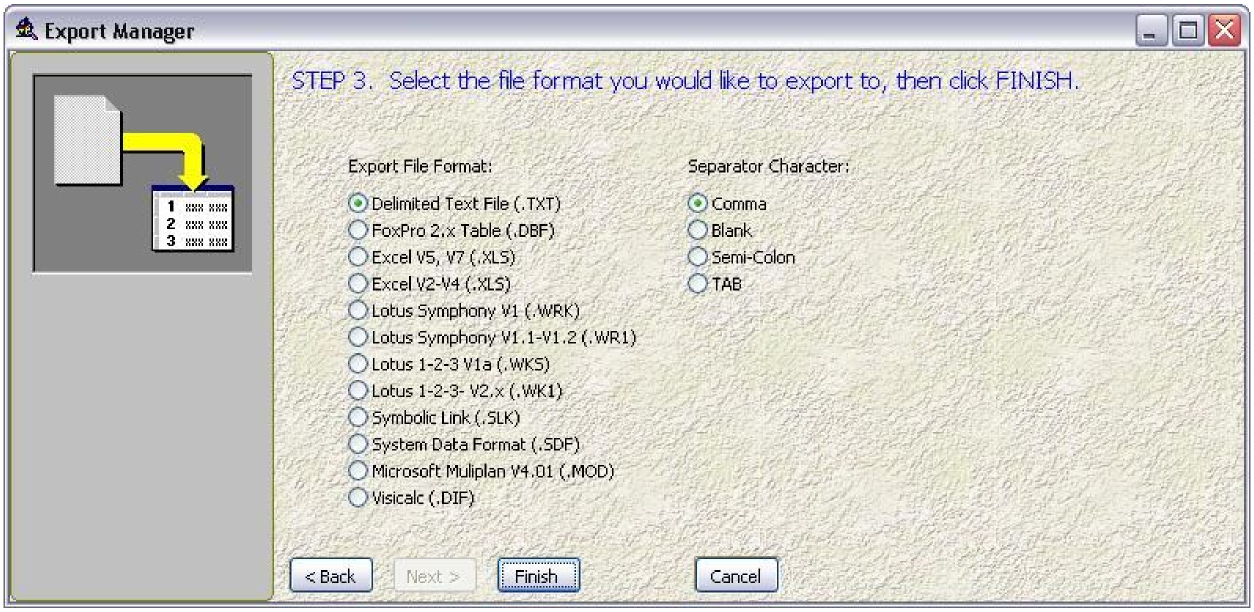



Figure 5-8 Choosing a File Type

When choosing a delimited text file you must also choose the separator character which can be one of a comma, a blank, a semi-colon or a tab. Choose the file type and then click the FINISH button. In our example we have chosen a comma delimited text file as the output destination.

Finally, you will be prompted for a file name and drive/folder location. Enter a file name. At this point the export will occur and indicate successful completion.

Here is the comma delimited text file created by our example:

```
"Eldon","Peters","123 Any Street","","Anytown","","","111-2222",1953.03.04
"Shiela","Peters","123 Any Street","","Anytown","","","111-2222",1954.03.08
"Tommy","Peters","123 Any Street","","Anytown","","","111-2222",1996.07.06
"Amanda","Smith","123 Elm Street","","Anytown","","","555-1212",1968.04.07
"Cindy","Smith","123 Elm Street","","Anytown","","","555-1212",1967.01.15
"Helen","Smith","123 Elm Street","","Anytown","","","555-1212",1945.12.18
"Joe","Smith","123 Elm Street","","Anytown","","","555-1212",1942.09.23
"Johnny","Smith","123 Elm Street","","Anytown","","","555-1212",1965.03.04
```

***Tip:*** *If you export to one of the non-text formats and have trouble reading the file, try creating a comma delimited text file instead. Most software packages are able to import comma delimited text files.*

## Exporting to Popular Accounting Packages

You can export your giving data directly to a native accounting package file.  ChurchWatch supports:

- QuickBooks IIF files
- Quicken QIF files
- Simply Accounting for Windows

When you select Giving Data in step one of the export, you are given several options as shown in Figure 5-9.

***NOTE:*** *As of Quicken 2004, QIF files are no longer supported.*

***IMPORTANT: Before beginning you will need to create accounts in your accounting package that exactly match the accounts in ChurchWatch including spelling and upper/lower case letters.***

***NOTE:*** *As of ChurchWatch Version 5, Simply Accounting for DOS is no longer supported.*

## Step 1 - Choose the Accounting File Type

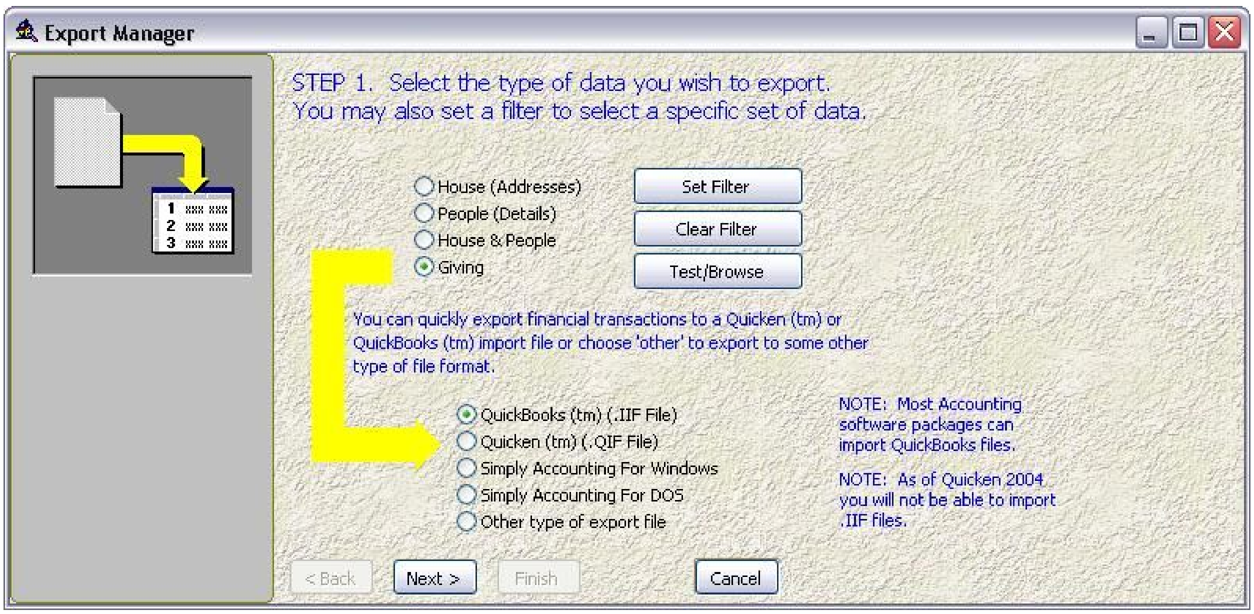



Figure 5-9  Choosing the Accounting File Type

Choose either a QuickBooks IIF file, a Quicken QIF file, Simply Accounting for Windows or other type of export file. Click the NEXT button to move to the next step.  If you choose “other” follow the directions under STEP 2 - Choose Specific Fields in the previous section.

## Step 2 - Choose the Giving Records to Export

Now you need to choose which giving records you are going to export. Simply clicking on the record will check the check box on that row and mark the record for export. Records that have already been exported are not listed to avoid exporting the same data more than once.

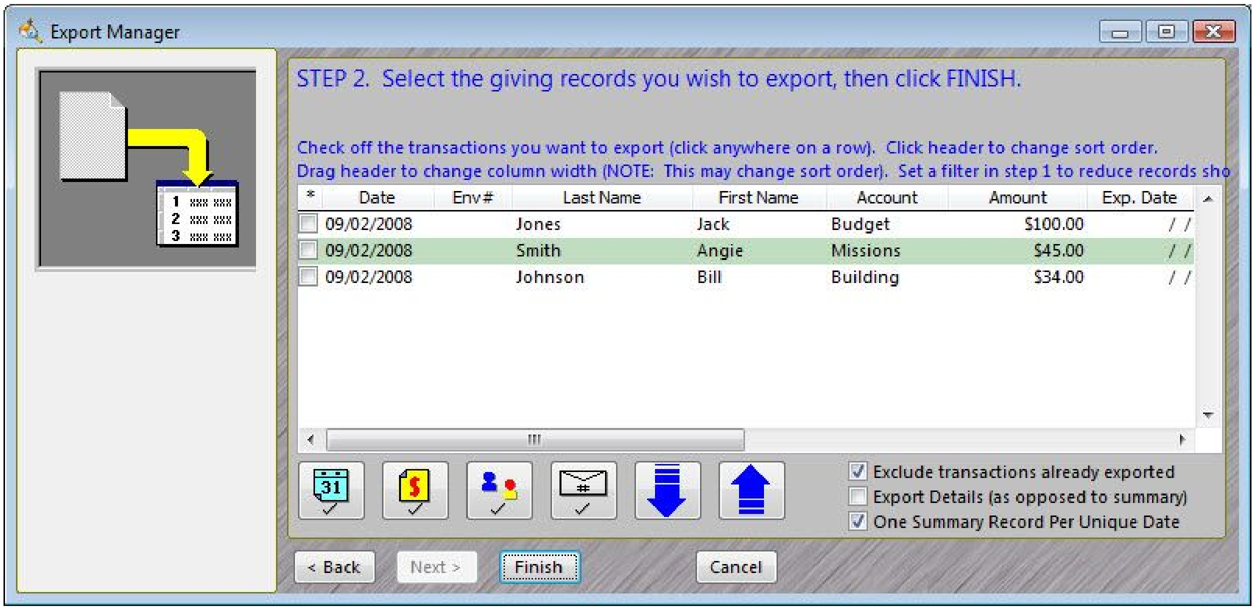
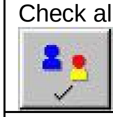
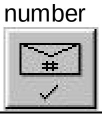



Figure 5-10 Choosing the Giving Records to Export

Since there are usually many records needing export to your accounting package, there are several powerful features on this page to assist you in selecting the correct records. Table 5-1 lists these features.

| Form Item | Description |
|---|---|
| Clicking on a row | Click either on a row or in the check box to check or uncheck the individual record for export. Only checked records are exported. |
| Check all, single batch date  | Click this button to check off all records for one batch date. You will be prompted for the batch date. |
| Check all, single account name  | Click this button to check off all records for one specific giving account name. You will be prompted for the account name. |
| Check all, single person  | Click this button to check off all records for one specific person. You will be prompted for the person's name. |
| Check all, single envelope number  | Click this button to check off all records for one specific envelope number. You will be prompted for the envelope number. |

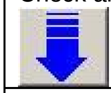
| Form Item | Description |
|---|---|
| Check all  | Click this button to check off all records listed. |
| Uncheck all  | Click this button to uncheck all records listed. |
| Exclude Transactions Already Exported Check Box | To avoid duplicate accounting entries, this box should normally be checked to exclude data you have already exported. If you would like to view records that have already been exported (and even export them again if you wish) uncheck this box.<br><br>***NOTE:*** *This is a fairly dangerous operation with respect to keeping your accounting records up to date and for this reason, leave this check box checked whenever possible!* |
| Export Details Check Box | ChurchWatch can export detailed giving data (ie offering records) or just the summary information (totals) for each batch or date. Normally you will likely want to export summary information so this box should be unchecked. Check this box to export detailed offering records – each offering will appear in your accounting page. |
| One Summary Record Per Unique Date | ChurchWatch will normally export one summary record per batch. If you have multiple batches on the same date, you can check this box to get a single summary record for each unique date, thereby combining batches that occur on the same date. |

Table 5-1 Accounting Export Features

## Sizing the Form, Changing the Sort order and Some Other Useful Features

You can resize the form to any size you are comfortable with. You can also change the sort order of the list simply by clicking on the column header. The width of the fields in the grid can be resized left and right by clicking between the column headers and then dragging either left or right. You can also change the row height by clicking between the rows and then dragging up or down. To reduce the list of records you are dealing with, you can set a data filter in step one - refer to Chapter 29 for information on data filters.

## Step 3 - Performing the Export

You can specify the deposit account that transactions will be credited to. Each Account Name is associated with one Deposit Account Name. The association is made in the Accounts Editor (LISTS->ACCOUNT NAMES).


Figure 5-11 Specifying a Deposit Account Name

In the Export Manager, once all desired records have been checked, click the FINISH button to begin the export. When prompted, enter the file name of the file you want to place the export data in. You may enter a file extension but it will be replaced with .IIF (QuickBooks) or .QIF (Quicken). For our example above, here is the sample QuickBooks file created. The first 3 lines are header information telling QuickBooks what is in this file. The following is an example QuickBooks file (note the deposit account names “Credit Union” and “Royal Bank”):

```
!TRNS,TRNSTYPE,DATE,ACCNT,NAME,AMOUNT,MEMO
!SPL,TRNSTYPE,DATE,ACCNT,NAME,AMOUNT,MEMO
!ENDTRNS
TRNS,DEP,10/13/03,Credit Union,Elizabeth Evans,35.00,
SPL,DEP,10/13/03,Budget,Elizabeth Evans,-35.00,
ENDTRNS
TRNS,DEP,10/13/03,Credit Union,Adam Johnson,20.00,
SPL,DEP,10/13/03,Budget,Adam Johnson,-20.00,
ENDTRNS
TRNS,DEP,10/13/03,Royal Bank,Leanne Johnson,30.00,
SPL,DEP,10/13/03,Missions,Leanne Johnson,-30.00,
ENDTRNS
TRNS,DEP,10/13/03,Credit Union,Loose Cash,30.00,
SPL,DEP,10/13/03,Budget,Loose Cash,-30.00,
ENDTRNS
```

Refer to your QuickBooks documentation for information on importing the file.

Here is a sample Quicken file:

```
D2001.11.15  "D" stands for deposit date
T30.00              "T" stands for transaction amount
NDEP                "N" stands for transaction type (DEP = deposit)
M                   "M" stands for memo and holds your comment
PEldon Peters       "P" stands for payee
Lbudget             "L" stands for catagory (account)
^
D2001.11.15
T40.00
NDEP
M
PHelen Smith
LMissions
^
D2001.11.15
T5.00
NDEP
M
PShiela Peters
LKidz Club
^
D2001.11.15
T50.00
NDEP
M
PJoe Smith
LMissions
^
```

Refer to your Quicken documentation for information on importing the file.

Here is a sample Simply Accounting file:

```
10-14-03,"10",""
0,35.00
10-14-03,"1",""
0,20.00
10-14-03,"2",""
0,30.00
10-14-03,"0",""
0,30.00
```

Refer to your Simply Accounting documentation for information on importing the file.

## *Chapter 6 Lists*

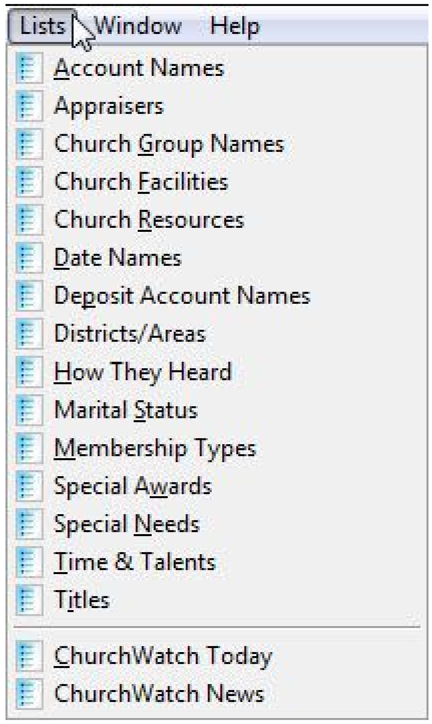



Figure 6-1 Lists Menu

ChurchWatch maintains several user editable lists in order to make the program as flexible as possible. Before entering data into ChurchWatch you will need to review and possibly add items to some of the lists shown in figure 6-1.

You will have to decide which lists need to be created. For example, if you plan to group people you will need to create some church group names in the Church Groups Names list. If you are using the Giving Manager to track offerings you will need to create items in the Accounts Names list. The following sections describe each of the ChurchWatch lists.

***Tip:*** *You can have ChurchWatch auto-format your list names by selecting an auto format method for lists on the FORMATS page of the SETUP form.*

## Account Names

If you intend to use the Giving Manager to track offerings or pledges, you will need to create a list of giving accounts that each offering or pledge can be assigned to. ChurchWatch provides a Giving Account Editor for this purpose. Note that once an account is used in the Giving Manager it cannot be deleted until either the record(s) in the Giving Manager are deleted or have their account altered, or the giving data is archived at year end. The Giving Account Editor is also where you associate deposit accounts with giving accounts for use in the Export Manager when exporting to an external Accounting software package.

To access this form select "Accounts Names" from the Lists menu.

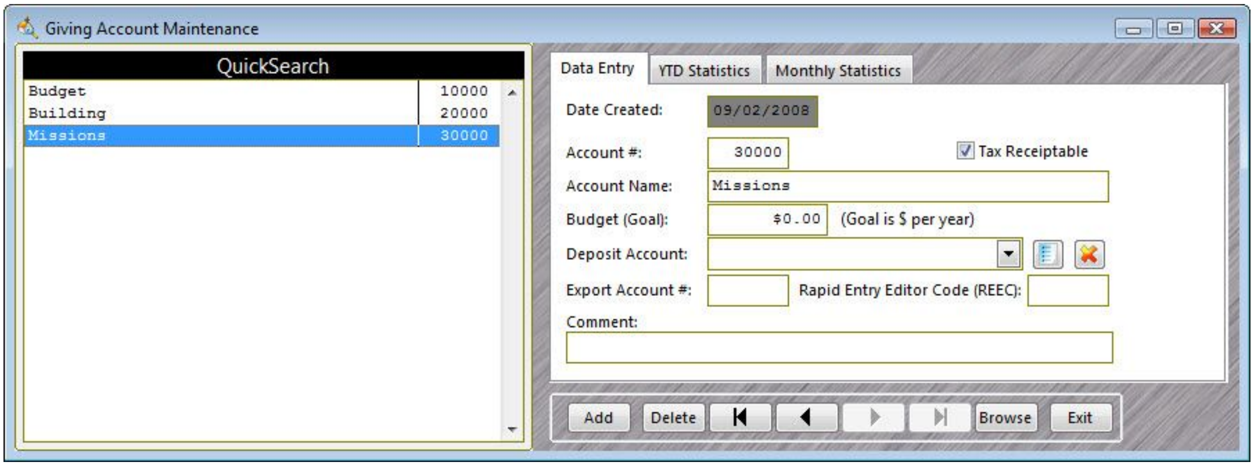



Figure 6-2 Account Name Editor

Table 6-1 lists the items on this form along with a description.

| Form Item | Description |
|---|---|
| PAGE 1 | |
| Date Created | Date the giving account was created. ChurchWatch automatically sets this. |
| Account # | You can assign a numeric account number to the account. |
| Tax Receiptable | Check this box if the giving account is tax receiptable. The receiptable status of any transaction in the Giving Manager can be altered at any time. The value of this will be the default used at initial entry time.<br><br>***Important:*** *Only records marked receiptable will be included on tax receipts and on the Substantiation of Contributions Report.* |
| Account Name | Name of the account. This item will be auto formatted if list auto format is turned on. |
| Budget (Goal) | Set a yearly budget goal for this account by filling in this field. |
| Deposit Account | If you intend to export giving data and import it into an external accounting package, you will need to define a deposit account name for each giving account. The deposit account name must exactly match the deposit account name in your accounting package. This is the deposit account that offerings to this giving account will be credited to in a double entry bookkeeping system. |
| Export Account # | This field is used for Simply Accounting Exports using the Export Manager. Enter your Simply Accounting number for the selected account here. This account number will then be included in the exported data from the Export Manager. |
| Rapid Entry Editor Code | The Giving Manager has a Rapid Entry Editor (REE). In order to increase the speed of data entry, a code is used instead of selecting the account name from a list. If you intended to use the Rapid Entry Editor, you must enter a code here. You may enter any code you wish but it must be unique. We recommend 2 digit codes because they can be entered quickly and are easy to remember. |
| Comment | Any comment. |
| PAGE 2 | |
| Table | The table on this page shows the year-to-date totals for all accounts you have created. Items in read show goals that have not been met. |
| PAGE 3 | |
| Table | The table on this page shows the monthly totals for all accounts you have created. |
| BUTTONS | |
| Add | Click this to create a new giving account. |
| Delete | Click this to delete the currently selected giving account. You cannot delete accounts that are in use by the Giving and/or Pledge Managers. |
| \|< | Click this to go to the first account. |
| < | Click this to go back one account. |
| > | Click this to go forward one account. |
| >\| | Click this to go to the last account. |
| Browse | Click this to view all account data in a spreadsheet format. |
| Exit | Click this to exit the Account Names Editor. |

Table 6-1 Account Names Editor Form Items

## Appraisers

In Canada, Gift-In-Kind donations can have their value appraised for tax receipt purposes.  If an external appraiser is used, the name and address of the appraiser should appear on the tax receipt.  The Appraisers Edit allows you to create and track appraisers you have used.

If your church is located outside of Canada, the Appraisers List is likely not needed but can be used if desired.

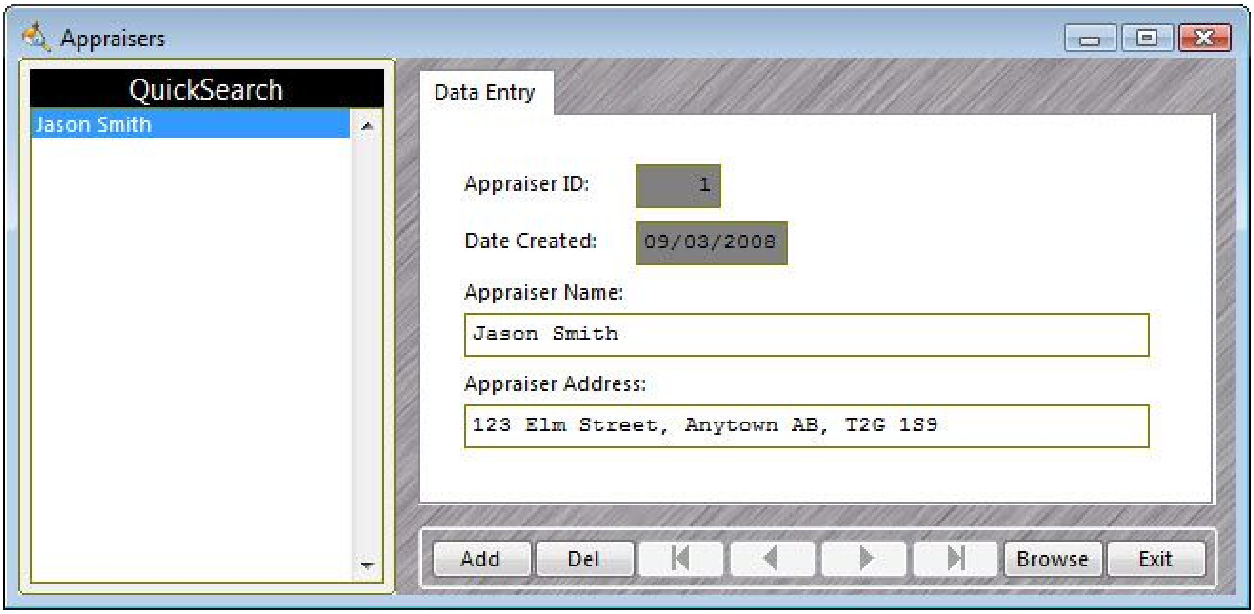


Figure 6-3  Appraisers Editor

| Form Item | Description |
|---|---|
| Appraiser ID | A unique ID assigned by ChurchWatch.  This ID cannot be user modified. |
| Date Created | Date the appraiser was created.  ChurchWatch automatically sets this. |
| Appraiser Name | The full name of the appraiser. |
| Appraiser Address | Address of the appraiser. |
| BUTTONS | |
| Add | Click this to create a new appraiser. |
| Del | Click this to delete the currently selected appraiser.  If the appraiser is in use by the Giving Manager, you will before warned and will be given the option to delete or keep. |
| \|< | Click this to go to the first appraiser. |
| < | Click this to go back one appraiser. |
| > | Click this to go forward one appraiser. |
| >\| | Click this to go to the last appraiser. |
| Browse | Click this to view all appraiser data in a spreadsheet format. |
| Exit | Click this to exit the Appraiser Editor. |

Table 6-2 Appraiser Editor Form Items

## Church Group Names

You can create a list of church group names using the Church Group Names Editor.  This is limited only by your imagination.  Examples of church groups might be cell groups, prayer groups, small groups, board members, missions group members, People who like pizza etc.  Select "Church Group Names" from the Lists menu.

Grouping people is very useful in the Mail Manager where you can send a form letter, print mailing labels or do a mail merge to all members of a group.  Many reports are also group based.   You can add a person to a group or set of groups in the Membership Manager, Groups page.  Perhaps a more convenient way is to add people to the group directly in the Church Group Names Editor since many people can be added here at once to the same group.

Group maintenance is also much easier in the Group Names Editor since you can see all people in the group at once making it easier to remove a set of people or all people from the group.

The Group Names Editor allows you to create folders and sub-folders to help organize your groups more efficiently.

***NOTE:*** *The Group Names Editor applies only to people, not households.*

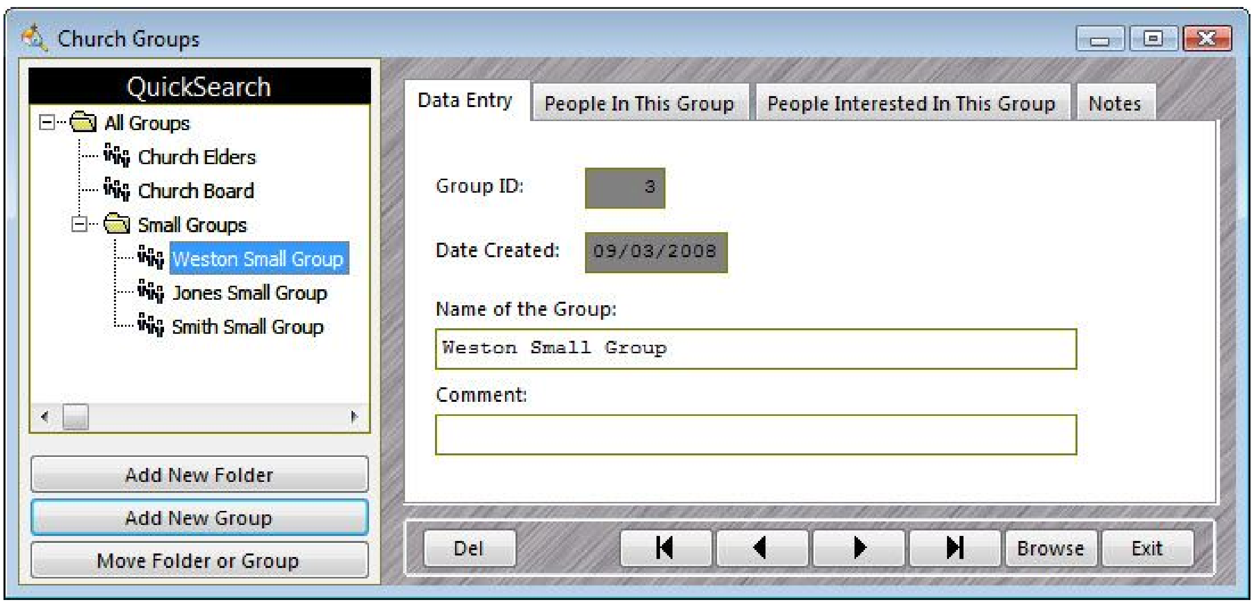



Figure 6-4  Group Names Editor

Table 6-3 lists the form items with their descriptions.

#### Renaming a Group or Folder

To rename a group or folder, click on the name in the list, pause and then click it a second time.  When a selection box appears around the item, make any edits you require and then press the ENTER key.  You can also rename a group directly on the "Data Entry" page.

#### People Interested in the Group

You can also keep track of a list of people interested in the group but not formally included in the group on page 3 of this form.

<table>
<tr><th>Form Item</th><th>Description</th></tr>
<tr><td>PAGE 1</td><td></td></tr>
<tr><td>List</td><td>The list is a “treeview” control that shows group folder names and group names within each folder. There is a root folder called “All Groups” that cannot be deleted. Click on a group name in this list to select it for editing.</td></tr>
<tr><td>Add New Folder</td><td>Click this button to create a new group folder. The folder is created in (under) the currently selected folder or the parent folder of the currently selected group.</td></tr>
<tr><td>Add New Group</td><td>Click this button to create a new group. It will be created under the currently selected folder or the parent folder of the currently selected group.</td></tr>
<tr><td>Move Folder or Group</td><td>First select the group or folder you want to move, then click this button. In the list that appears, select the folder name that you want to move the item(s) to. You may move a single group or an entire folder tree (including all sub folders).</td></tr>
<tr><td>Group ID</td><td>Used internally by ChurchWatch.</td></tr>
<tr><td>Date Created</td><td>The date the group was created.</td></tr>
<tr><td>Name of the Group</td><td>Name of the group. This will be auto formatted if list auto formatting is turned on. This field indicates the current group that most buttons on this form will operate on. You can edit the group name here.</td></tr>
<tr><td>Comment</td><td>Any comment.</td></tr>
<tr><td>PAGE 2</td><td></td></tr>
<tr><td>List Box</td><td>A list of all people assigned to this group.</td></tr>
<tr><td>Add People</td><td>Click this button to add people to the current group.</td></tr>
<tr><td>Add By Filter</td><td>This button provides a handy way to add a large number of people to the group by using a people filter. For more information on filters refer to chapter 29.</td></tr>
<tr><td>Copy From</td><td>This button allows you to copy all people from another group to this group.</td></tr>
<tr><td>Remove</td><td>Select a person in the group and then click this button to remove him/her from the current group.</td></tr>
<tr><td>Remove All</td><td>Click this to remove all people from the current group.</td></tr>
<tr><td>Delete All</td><td>Similar to Remove All except this <u>deletes</u> all people in the group from your Membership data as well. Use this button with caution!</td></tr>
<tr><td>PAGE 3</td><td></td></tr>
<tr><td>List Box</td><td>A list of all people interested in this group.</td></tr>
<tr><td>Add People</td><td>Click this button to add people to the current interest group.</td></tr>
<tr><td>Add By Filter</td><td>This button provides a handy way to add a large number of people to the interest group by using a people filter. For more information on filters refer to chapter 29.</td></tr>
<tr><td>Copy From</td><td>This button allows you to copy all people from another group to this group.</td></tr>
<tr><td>Remove</td><td>Select a person in the interest group and then click this button to remove him/her from the current interest group.</td></tr>
<tr><td>Remove All</td><td>Click this to remove all people from the current interest group.</td></tr>
<tr><td>Delete All</td><td>Similar to Remove All except this <u>deletes</u> all people in the interest group from your Membership data as well. Use this button with caution!</td></tr>
<tr><td>PAGE 4</td><td></td></tr>
<tr><td>Notes</td><td>You can keep free-form notes, meeting minutes or anything else of interest in the notes window for each group.</td></tr>
<tr><td>BUTTONS</td><td></td></tr>
<tr><td>Del</td><td>Click this to delete the current group.</td></tr>
<tr><td>|<</td><td>Click this to go to the first group in the list.</td></tr>
<tr><td><</td><td>Click this to go back one group.</td></tr>
<tr><td>></td><td>Click this to go forward one group.</td></tr>
<tr><td>>|</td><td>Click this to go to the last group.</td></tr>
<tr><td>Browse</td><td>Click this to view all group data in a spreadsheet format.</td></tr>
<tr><td>Exit</td><td>Click this to exit the Group Editor.</td></tr>
</table>

Table 6-3 Group Names Editor Form Items

## Church Facilities

Every church has facilities that need to be managed. Facilities are usually rooms in the church such as meeting rooms, class rooms, the sanctuary, a gym etc. ChurchWatch provides a Church Facilities Editor to allow you to create and maintain a list of facilities. The facilities you define can be booked in the Schedule Manager. You can view the booking schedule for any given facility from several places in ChurchWatch. The Schedule Manager can also warn you if you overbook a facility. Before any of this can happen, you need to create a list of facilities specific to your church. Select "Church Facilities" from the Lists menu.

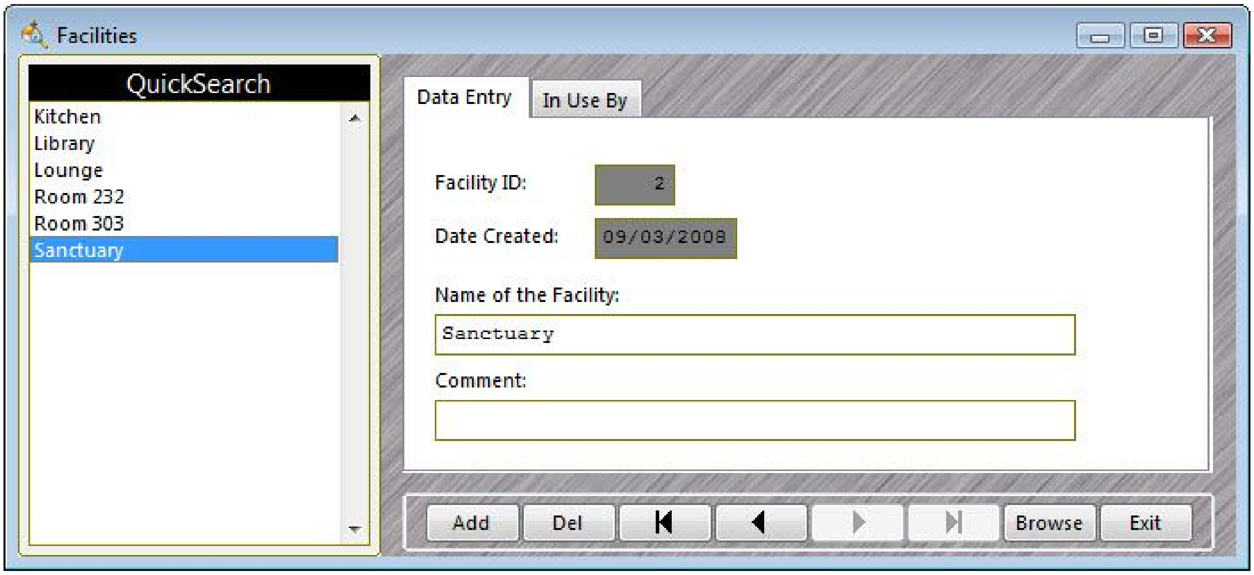



Figure 6-5 Church Facilities Editor

| Form Item | Description |
|---|---|
| PAGE 1 | |
| Facility ID | Used internally by ChurchWatch. |
| Date Created | The date the facility name was created. |
| Name of the Facility | Name of the facility. This will be auto formatted if list auto formatting is turned on. This field indicates the current facility that most buttons on this form will operate on. |
| Comment | Any comment. |
| PAGE 2 | |
| List Box | A list of all events and classes that use this facility. |
| Schedule | Click this to view the detailed schedule listing for the facility. Figure 6-6 below shows an example schedule. |
| Remove | Select an event or class and then click this button to remove the facility from the selected event or class. |
| BUTTONS | |
| Add | Click this to create a new facility. |
| Del | Click this to delete the current facility. |
| \|< | Click this to go to the first facility in the list. |
| < | Click this to go back one facility. |
| >> | Click this to go forward one facility. |
| >\| | Click this to go to the last facility. |
| Browse | Click this to view all facility data in a spreadsheet format. |
| Exit | Click this to exit the Facilities Editor. |

Table 6-4 Facilities Editor Form Items

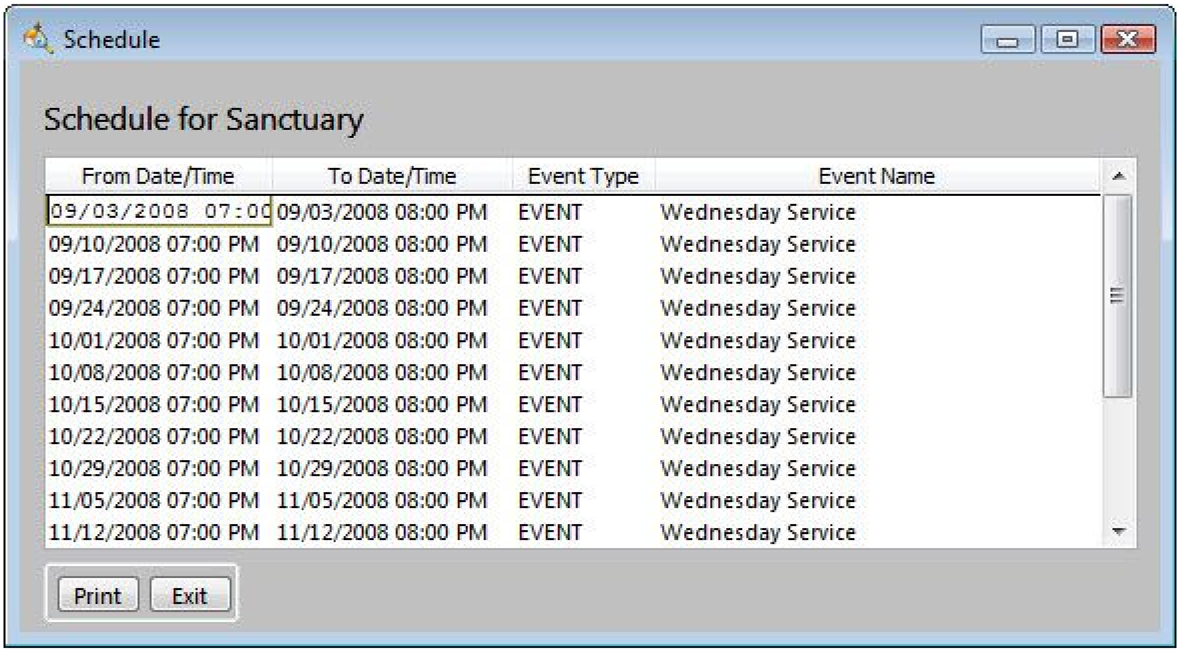


Figure 6-6  Example Schedule for Facility ‘Sanctuary’

## Church Resources

Every church has resources that need to be managed. Resources are assets that the church owns and needs to track for insurance, booking, lending, scheduling or other reasons. ChurchWatch provides a Resource Editor to allow you to create and maintain a list of resources and even store a photo of the resource. The resources you define can be booked in the Schedule Manager. You can view the booking schedule for any given resource from several places in ChurchWatch. ChurchWatch can also warn you if you overbook a resource. Before any of this can happen, you need to create a list of resources specific to your church. Select "Church Resources" from the Lists menu.

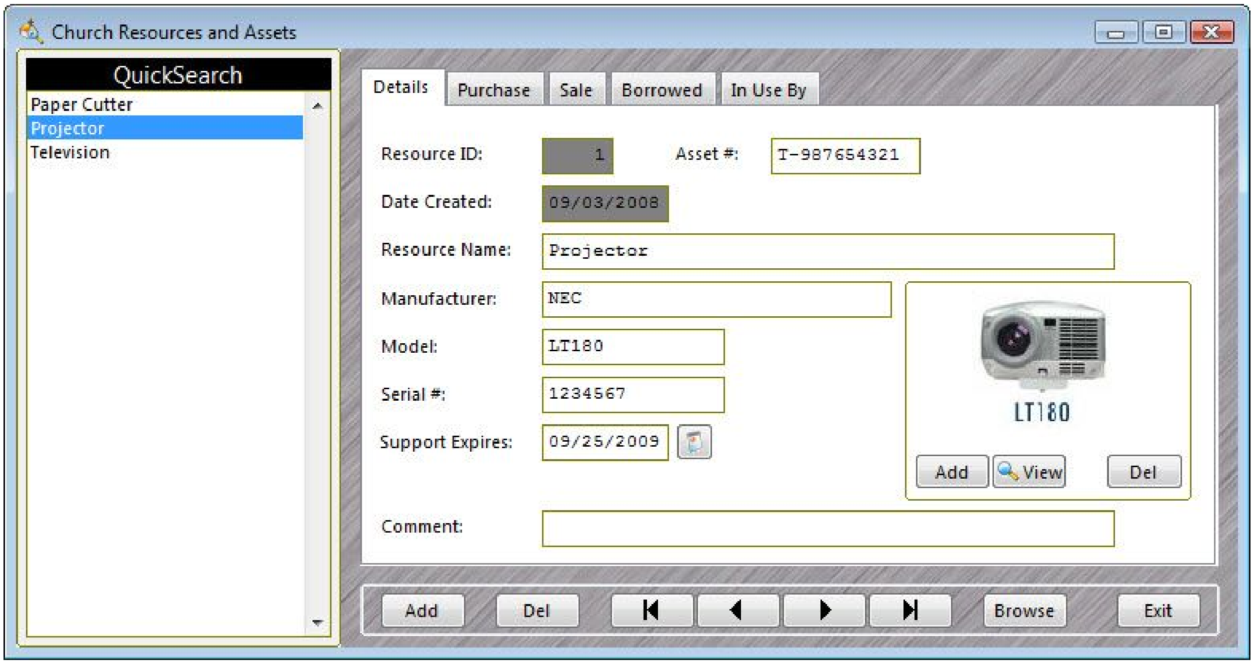



Figure 6-7 Resource Editor

***Tip:*** *If you decide to track your church resources using the Resource Editor, remember to keep a backup of your ChurchWatch data off-site in case of a fire. This listing would be useful for insurance purposes.*

| Form Item | Description |
|---|---|
| PAGE 1 | |
| Resource ID | Used internally by ChurchWatch. |
| Date Created | Date resource name was created. |
| Asset # | If your church keeps asset numbers enter it here. ChurchWatch will not use it except to print it on reports. |
| Resource Name | Name of the resource.<br><br>***NOTE:*** *If the name of the resource has a red background it indicates that the resource is currently lent out - check the Borrow Page to see who has it.*<br><br>This item will be auto formatted if list auto formatting is turned on. This field indicates the current resource that most buttons on this form will operate on. |
| Manufacturer | Company that manufactured the resource item. |
| Model | Model number. |
| Serial # | Serial number. |
| Support Expires | Date that support expires for this item. |
| Add (Photo) | Click this to add a photo of the resource. The photo must be in .BMP, .JPG or .GIF format. |
| View (Photo) | Click this to view a larger copy of the photo. |
| Del (Photo) | Click this to delete the photo. |
| Comment | Any comment. |
| PAGE 2 | |
| Purchased By | Person who purchased the resource item. |
| Purchase Date | Date the resource was purchased. |
| Purchase Price | Amount paid for the resource. |
| Warranty Expires | Warranty expiry date. |
| Vendor Contact Info and Notes | Name, address, phone, free form notes etc of the company, organization or individual that the resource was purchased from. You can enter anything you want in this edit box. |
| PAGE 3 | |
| Date Sold | Date the resource was sold. |
| Sale Price | Sale price. |
| Sold To and Contact Information | Name, address, phone, free form notes etc of the company, organization or individual the resource was sold to. You can enter anything you want in this edit box. |
| PAGE 4 | |
| Borrowed By | Name of person who currently has the resource borrowed. Can only be borrowed by a person listed in the Membership Manager.<br><br>***NOTE:*** *The present version of ChurchWatch does not consider borrowed items when checking for resource conflicts. Keep this in mind when lending out items that may be required by church events or classes.* |
| Date Borrowed | Date the resource was borrowed. |
| Set | Click this to select the name of the person borrowing the resource. |
| Clear | Click this to clear the borrower's name. |
| PAGE 5 | |
| List Box | A list of events and classes that are using this resource. |
| Schedule | Click this to view the detailed schedule listing for the resource. Figure 6-6 shows an example schedule. |
| Remove | Click this button to remove the current resource from the selected event or class. |
| BUTTONS: | |
| Add | Click this to create a new resource. |
| Del | Click this to delete the current resource name. |
| \|< | Click this to go to the first resource. |
| << | Click this to go back one resource. |

| Form Item | Description |
|---|---|
| >> | Click this to go forward one resource. |
| >\| | Click this to go to the last resource. |
| Browse | Click this to view all resource data in a spreadsheet format. |
| Exit | Click this to exit the Resource Editor. |

Table 6-5 Resource Editor Form Items

## Date Names

You can store any number of special dates for every person in your database. Each date can be given a name of your choosing (refer to the example in figure 6-8). Select "Date Names" from the Lists menu to use the Date Names Editor to edit the names of the dates you want to keep track of. Table 6-6 lists the form items with their descriptions.

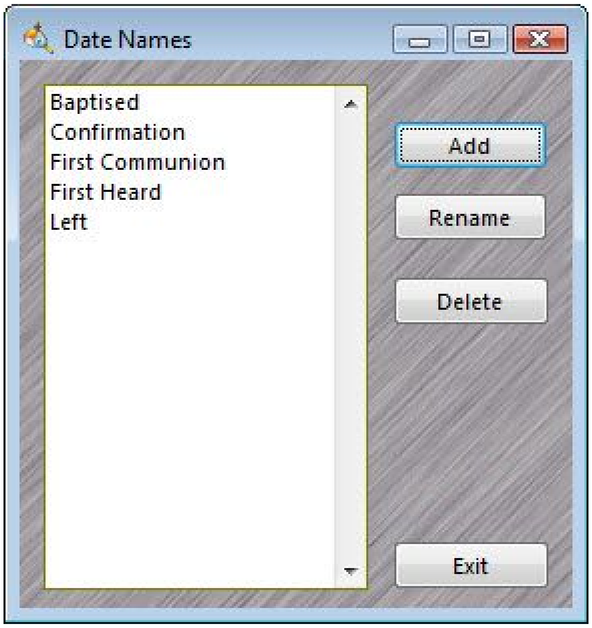



Figure 6-8 Date Names Editor

| Form Item | Description |
|---|---|
| List | Lists all defined date names. |
| Add | Click this button to add a new date name. |
| Rename | Select a date name, then click this button to rename it. |
| Delete | Select a date name, then click this button to delete it. |
| Exit | Click this to exit the Date Names Editor. |

Table 6-6 Date Names Editor Form Items

## Deposit Account Names

Deposit account names are associated with giving accounts in the Account Names Editor (already described). Deposit Account Names are created in the Deposit Account Names editor. Select “Deposit Account Names” from the Lists menu.


Figure 6-9 Deposit Account Names Editor

| Form Item | Description |
|---|---|
| List | Lists all defined deposit account names. |
| Add | Click this button to add a new deposit account name. |
| Rename | Select a deposit account name, then click this button to rename it. |
| Delete | Select a deposit account name, then click this button to delete it. |
| Exit | Click this to exit the Deposit Account Names Editor. |

Table 6-7 Deposit Account Names Editor Form Items

## District/Area Names

You can create a list of districts or areas using this form. Districts/areas are selected in the Membership Manager. There are also several related reports in the Report Manager. You can also filter on a specific district/area in the Mail Manager and print the district/area on mailing labels.

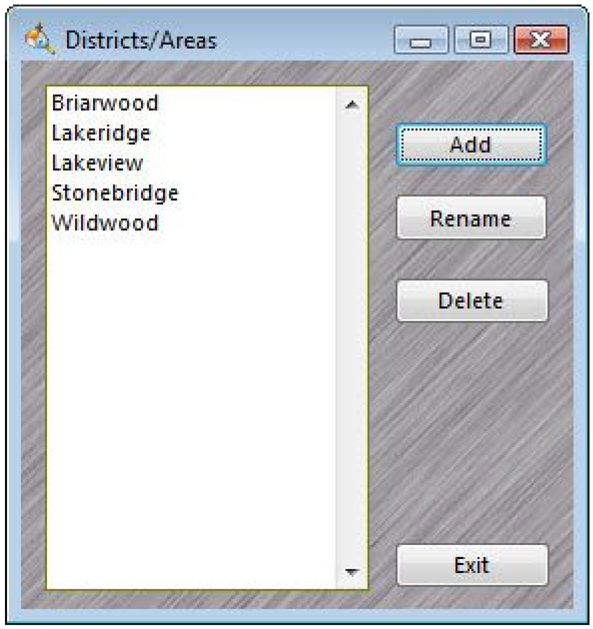



Figure 6-10 District/Areas Editor

| Form Item | Description |
|---|---|
| List | Lists all defined districts/areas. |
| Add | Click this button to add a new district/area. |
| Rename | Select a district/area name, then click this button to rename it. |
| Delete | Select a district/area name, then click this button to delete it. |
| Exit | Click this to exit the District/Area Names Editor. |

Table 6-8 District/Area Names Editor Form Items

## How They Heard

You can create a list of how people heard about your church, then use this in the Membership Manager.  Examples of this would be “Newspaper”, “Friend” etc.

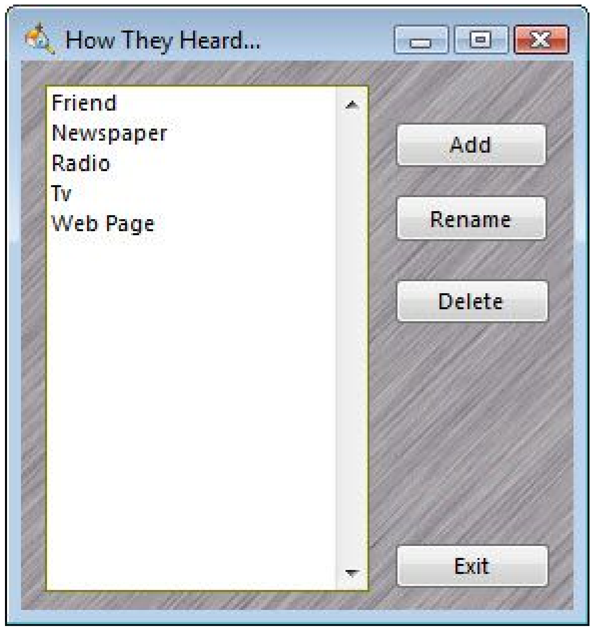



Figure 6-11  How They Heard Editor

| Form Item | Description |
|---|---|
| List | Lists all defined how-they-heards. |
| Add | Click this button to add a new how-they-heard. |
| Rename | Select a how-they-heard name, then click this button to rename it. |
| Delete | Select a how-they-heard name, then click this button to delete it. |
| Exit | Click this to exit the How They Heard Editor. |

Table 6-9 How They Heard Editor Form Items

## Marital Status

You can enter your own marital status names for use in the Membership Manager by using the Marital Status Editor. Select “Marital Status” from the Lists menu.

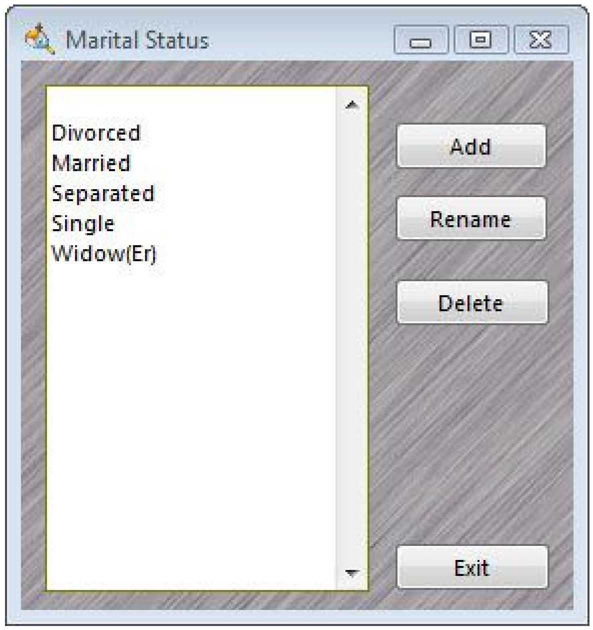


Figure 6-12 Marital Status Editor

| Form Item | Description |
|---|---|
| List | The list at the left of the form lists all currently defined marital status names. Click inside this list to select a marital status type for renaming or deletion. |
| Add | Click this to create a new marital status type. |
| Rename | Click this button to rename the currently selected marital status type. |
| Delete | First select an item from the list and then click this to delete the marital status. |
| Exit | Click this to exit the Marital Status Editor |

Table 6-10 Marital Status Editor Form Items

## Membership Types

You can enter your own church membership types for use in the Membership Manager by using the Membership Type Editor.  Example membership types might be “Full”, “Youth”, “No” etc.  Select “Membership Types” from the Lists menu.

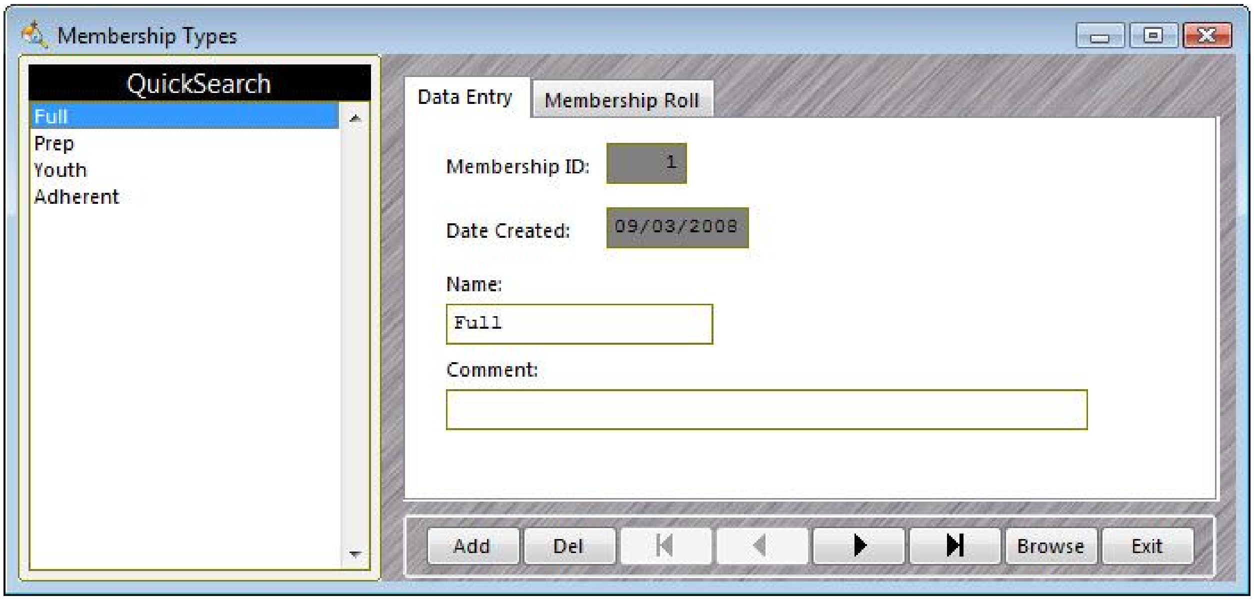



Figure 6-13  Membership Types Editor

| Form Item | Description |
|---|---|
| PAGE 1 | |
| Membership ID | Used internally by ChurchWatch. |
| Date Created | Date this membership type was created. |
| Name | Name of the membership type.  This item will be auto formatted if list auto formatting is turned on.  This field indicates the current type that most buttons on this form will operate on. |
| Comment | Any comment. |
| BUTTONS | |
| Add | Click this to create a new membership type. |
| Del | Click this to delete the current membership type. |
| \|< | Click this to go to the first membership type. |
| < | Click this to go back one membership type. |
| > | Click this to go forward one membership type. |
| >\| | Click this to go to the last membership type. |
| Browse | Click this to view all membership types in a spreadsheet format. |
| Exit | Click this to exit the Membership Types Editor. |

Table 6-11 Membership Types Editor Form Items

## Special Awards

From the Schedule Manager you can assign special awards to people that attend classes. Awards are defined in the Awards Editor. Award handling is unique since deleting an award from the awards list will not remove copies of the award already assigned to people. These can be removed or unassigned in the Membership Manager by choosing a person, then working on the Classes page. Select "Special Awards" from the Lists menu.

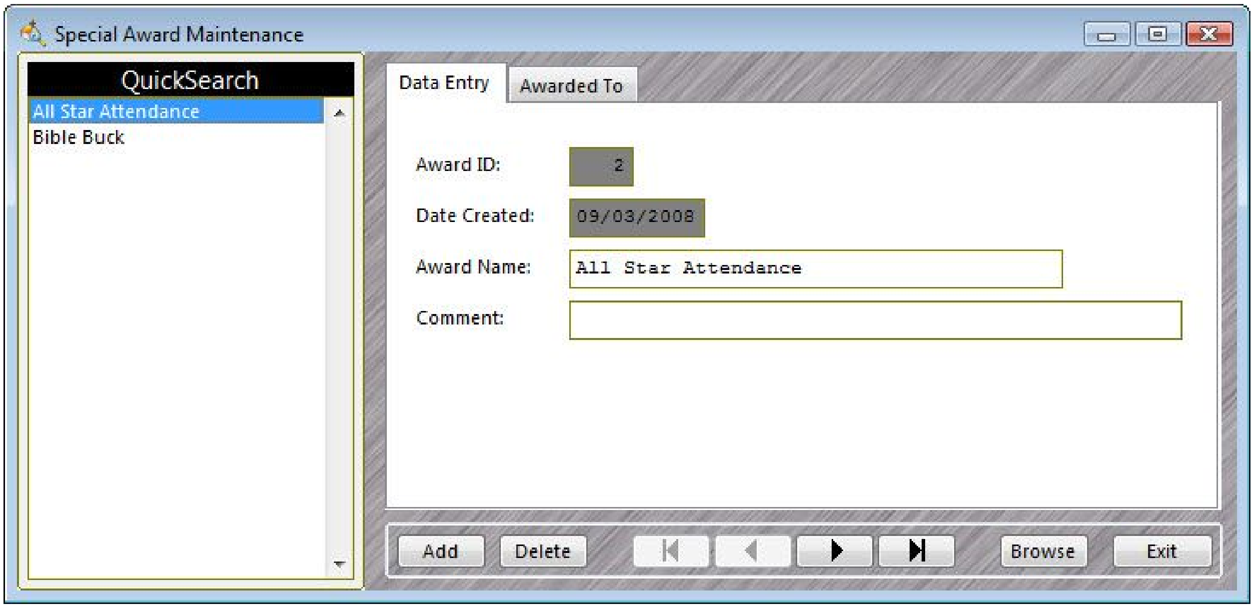



Figure 6-14 Awards Editor

<table>
<tr><th>Form Item</th><th>Description</th></tr>
<tr><td>PAGE 1</td><td></td></tr>
<tr><td>Award ID</td><td>Used internally by ChurchWatch</td></tr>
<tr><td>Date Created</td><td>Date the award was created.</td></tr>
<tr><td>Award Name</td><td>Name of the award. This item will be auto formatted if list auto formatting is turned on. This field indicates the current award that most buttons on this form will operate on.</td></tr>
<tr><td>Comment</td><td>Any comment.</td></tr>
<tr><td>PAGE 2</td><td></td></tr>
<tr><td>Table</td><td>A list of all people who have the current special award.</td></tr>
<tr><td>Add</td><td>Click this button to add people to the list.</td></tr>
<tr><td>Remove</td><td>Select a person and then click this button to remove him/her from the list.</td></tr>
<tr><td>Remove All</td><td>Click this button to remove all people from the list.</td></tr>
<tr><td>BUTTONS</td><td></td></tr>
<tr><td>Add</td><td>Click this to create a new award.</td></tr>
<tr><td>Delete</td><td>Click this to delete the current award name.</td></tr>
<tr><td>|<</td><td>Click this to go to the first award.</td></tr>
<tr><td><</td><td>Click this to go back one award.</td></tr>
<tr><td>>></td><td>Click this to go forward one award.</td></tr>
<tr><td>>|</td><td>Click this to go to the last award.</td></tr>
<tr><td>Browse</td><td>Click this to view all awards in a spreadsheet format.</td></tr>
<tr><td>Exit</td><td>Click this to exit the Awards Editor.</td></tr>
</table>

Table 6-12 Awards Editor Form Items

## Special Needs

Adults and children in your church may have special needs that Sunday School teachers and others will need to know about. You can create a list of special needs and then assign them to people. Some examples of special needs might be "Asthma", "Wheel Chair Access" or "Allergic to Bee Stings". There are several reports pertaining to special needs and you can target a group of people with one special need in the Mail Manager to create mailings, mailing labels, etc. Select "Special Needs" from the Lists menu.

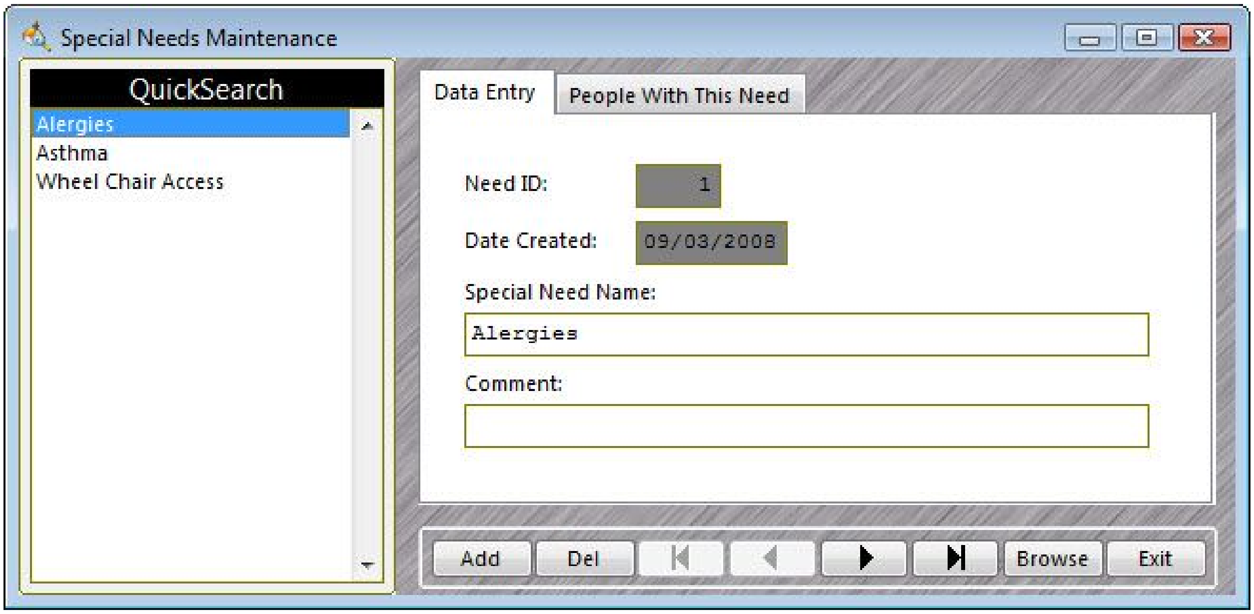



Figure 6-15 Special Needs Editor

You can add a person to one or more special needs groups in the Membership Manager, Needs page. Perhaps a more convenient way is to add people to the group directly in the Special Needs Editor since many people can be added at once here.

Special Need maintenance is also much easier in the Special Needs Editor since you can see all people in the group at once making it easier to remove a set of people or all people from the group.

<table>
<tr><th>Form Item</th><th>Description</th></tr>
<tr><td>PAGE 1</td><td></td></tr>
<tr><td>Need ID</td><td>Used internally by ChurchWatch.</td></tr>
<tr><td>Date Created</td><td>The date the need name was created.</td></tr>
<tr><td>Special Need Name</td><td>Name of the special need.  This will be auto formatted if list auto formatting is turned on.  This field indicates the current need that most buttons on this form will operate on.</td></tr>
<tr><td>Comment</td><td>Any comment.</td></tr>
<tr><td>PAGE 2</td><td></td></tr>
<tr><td>List Box</td><td>A list of all people who have this need.</td></tr>
<tr><td>Add People</td><td>Click this button to add people to the group with the current need.</td></tr>
<tr><td>Remove</td><td>Select a person in the needs group and then click this button to remove him/her from the current needs group.</td></tr>
<tr><td>Remove All</td><td>Click this to remove all people from the current need group.  This will not actually delete any people records, just remove the need.</td></tr>
<tr><td>BUTTONS</td><td></td></tr>
<tr><td>Add</td><td>Click this to create a new special need.</td></tr>
<tr><td>Del</td><td>Click this to delete the current special need.</td></tr>
<tr><td>|<</td><td>Click this to go to the first need in the list.</td></tr>
<tr><td><</td><td>Click this to go back one need.</td></tr>
<tr><td>></td><td>Click this to go forward one need.</td></tr>
<tr><td>>|</td><td>Click this to go to the last need.</td></tr>
<tr><td>Browse</td><td>Click this to view all special need data in a spreadsheet format.</td></tr>
<tr><td>Exit</td><td>Click this to exit the Special Needs Editor.</td></tr>
</table>

Table 6-13 Special Needs Editor Form Items

## Time & Talents

Finding volunteers for various jobs that need doing around the church can be a challenge. The Time and Talents List and T&T Page in the Membership Manager can help you find the people you need. The Time and Talents Editor is the method by which you can create a list of hobbies, interests, skills, spiritual gifts, ministries and any other item you can think of. Select "Time & Talents" from the Lists menu.

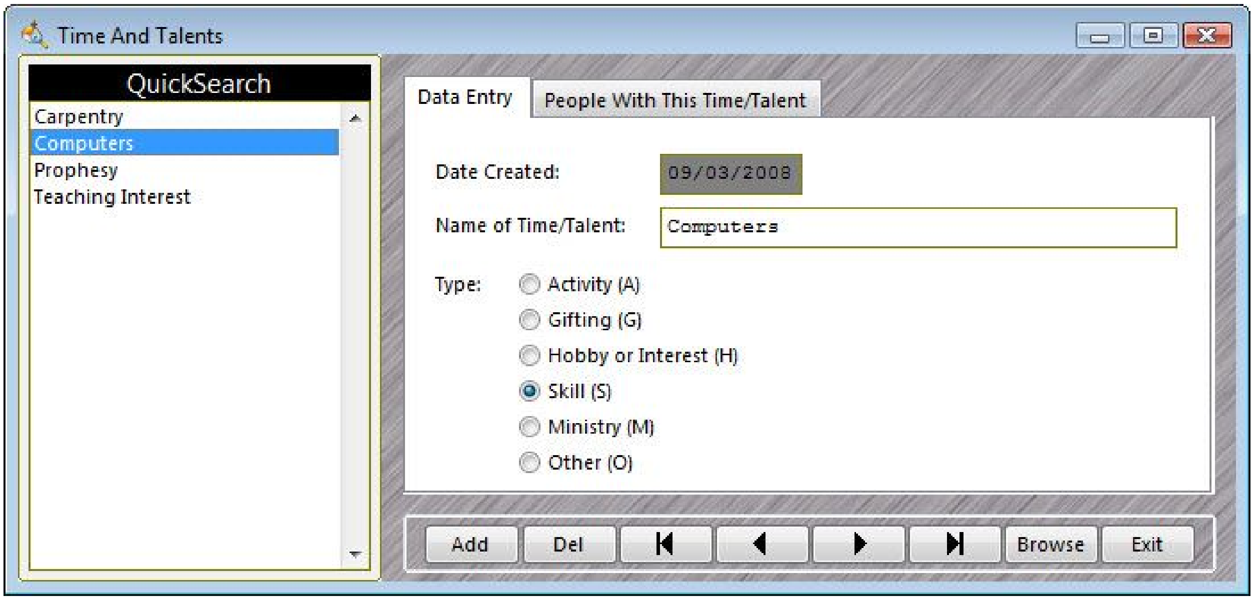



Figure 6-16 Time and Talents Editor

| Form Item | Description |
|---|---|
| **PAGE 1** | |
| Date Created | Date the time/talent was created. |
| Name of Time/Talent | Name of the time/talent. This will be auto formatted if list auto formatting is turned on. This field indicates the current time/talent that most buttons on this form will operate on. |
| Type | Type. One of:<br>A Activity<br>G Gifting<br>H Hobby or Interest<br>S Skill<br>M Ministry<br>O Other |
| **PAGE 2** | |
| List Box | A list of all people who have or are involved with this time/talent. |
| Add People | Click this to add people to the list of people who have or are involved with the current time/talent. |
| Remove | Select a person and then click this to remove him/her from the group of people that have the current time/talent. |
| Remove All | Click this to remove all people from the group of people who have this time/talent. |
| **BUTTONS** | |
| Add | Click this to create a new time/talent. |
| Del | Click this to delete the current time/talent. |
| \|< | Click this to go to the first time/talent. |
| < | Click this to go back one time/talent. |
| > | Click this to go forward one time/talent. |
| >\| | Click this to go to to the last time/talent. |
| Browse | Click this to view all time/talent data in a spreadsheet format. |
| Exit | Click this to exit the Time & Talent Editor. |

Table 6-14 Time and Talents Editor Form Items

## Titles

You have the option of entering titles for people such as Mr., Mrs., Ms., etc in the Membership Manager. Doing so will give you the option of creating more formal mailing labels in the Mail Manager. For example “Mr. and Mrs. Joe Smith” rather than “Joe and Helen Smith”. Before you can do so you will need to create the titles using the Titles Editor. Select “Titles” from the Lists menu.

Figure 6-17 Titles Editor

| Form Item | Description |
|---|---|
| List | The list at the left of the form lists all currently defined titles. |
| Add | Click this to create a new title. |
| Rename | First select a title from the list and then click this to rename it. |
| Delete | First select a title from the list and then click this to delete it. |
| Exit | Click this to exit the Titles Editor. |

Table 6-15 Titles Editor Form Items

## Reports

There are many reports available relating to all of the different ChurchWatch lists. Refer to Chapter 21 for information about the Report Manager.

# *Chapter 7 Security and User Name Maintenance*

## Why Do You Need Security?

ChurchWatch has several layers of security built into it. The product is shipped with security turned off to make it easier for first time users. When security is turned on you will be required to log in to gain access to ChurchWatch. That means you will need a login name and a password. Not only is the use of the security features recommended, your government's laws may actually require that your church records be protected. White Mountain Software highly recommends using the security features of ChurchWatch, even if only one computer is used in your church.

Although many people may have access to the church computer(s), and therefore ChurchWatch, only the people you give user names and passwords to will actually be able to enter the program.

Passwords used in ChurchWatch are stored encrypted to minimize chances that someone would be able to "crack" the security system. As well, when passwords are typed in, the characters are not shown on the screen.

You will need to designate one person to be the ChurchWatch administrator and an "admin" user account is supplied for this purpose. The "admin" account cannot be deleted or modified (other than the password).

It is HIGHLY recommended that you turn on security as soon as you are comfortable with ChurchWatch.

## What Parts of the Program Are Protected?

All areas of the program can be protected in detail with View/Modify and/or Delete access privileges.

## Turning Security On or Off

Security is turned on by unchecking the "Disable All Security" checkbox on the SECURITY page of the SETUP form (refer to figure 7-2). Once security is turned on only the "admin" user will have access to the SECURITY page from that point on. Only the "admin" user has permission to add or delete user accounts.

To turn off security (not recommended) login as "admin" and check the "Disable All Security" checkbox on the SECURITY page of the SETUP form.

Once security is turned on a login form will appear each time you start ChurchWatch as shown in figure 7-1. In order to gain entry into ChurchWatch you will need a user account and password. These can only be created by the ChurchWatch administrator (ie the 'admin' user).

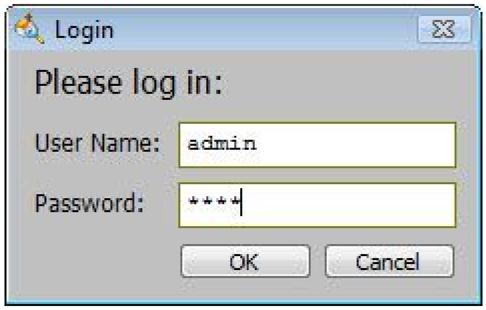



Figure 7-1  ChurchWatch Login Form

## The “admin” Account

ChurchWatch is shipped with an “admin” user name already defined.  The default password is “lion”.  The first time you login you will need to use the “admin” user name.   The user name and password are case sensitive so “admin” and “lion” should be typed into the login form in lowercase and without the quotes.  Press the Enter key once you have entered the password.

You will need to designate one person as the ChurchWatch administrator.  The person you choose should be very trustworthy since he/she will have unlimited access to ChurchWatch and all user accounts.

As the administrator, your first job should be to change the password from “lion” to something secret that only you know.  Never write your password down where someone could find it and never use simple passwords such as the names of your children.

Once you have changed your login password you are ready to create user accounts if other users will require access to ChurchWatch.

***Tip:*** *Do not forget your password!  If you forget the password to the “admin” account there is no way to modify user accounts in ChurchWatch or to perform maintenance functions.  Refer to the section “What if I Forget My Password?” later on in this chapter.*

## User Names and Passwords

Adding, deleting and editing of user accounts can only be performed if you are logged in as "admin" or if security is turned off. First find the SECURITY page of the SETUP form as shown in figure 7-2.

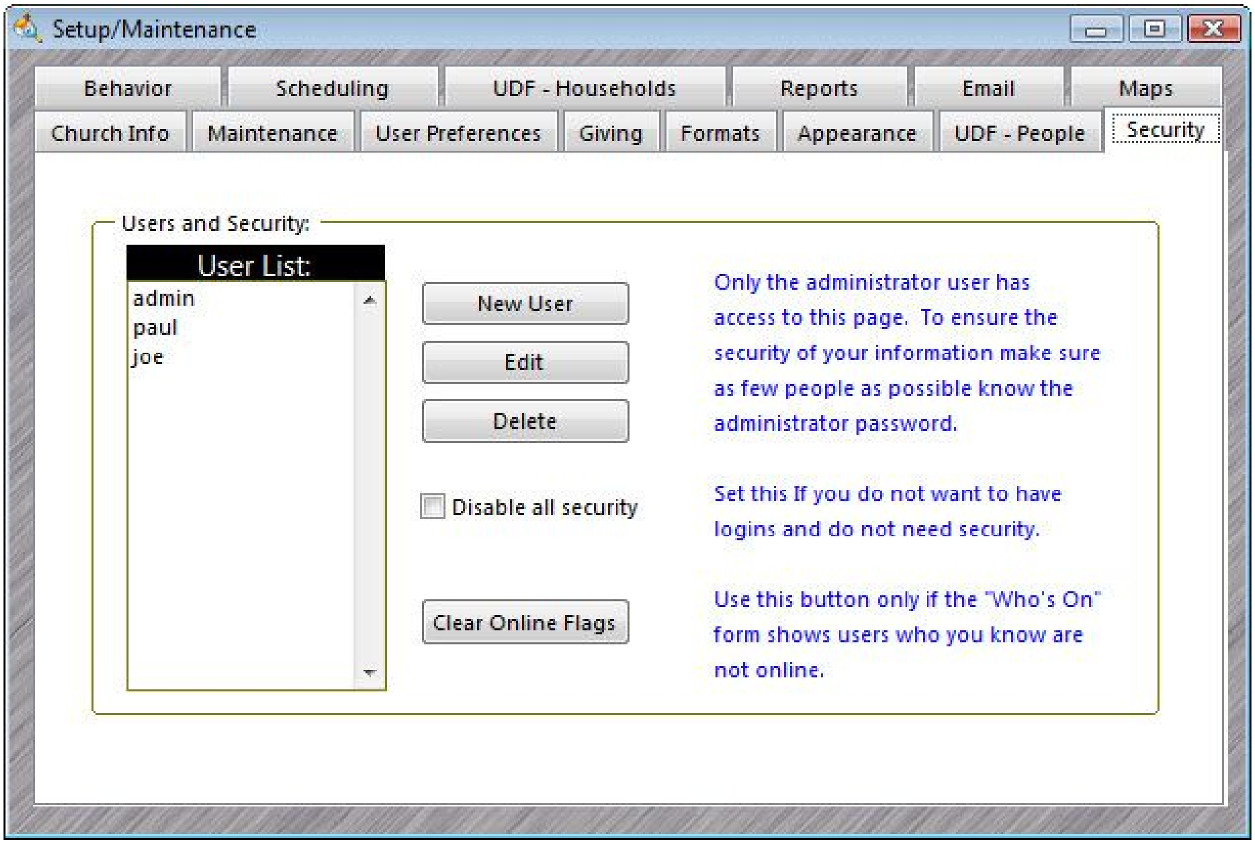



Figure 7-2 Security Setup Page

## Adding or Editing a User Account

To create a new ChurchWatch user name, click the ADD button. You will be prompted for the name of the user. Note that user names are case sensitive, meaning that the user name is sensitive to upper and lower case letters. It will have to be typed in at login time exactly the way you create the name here. Once you have entered the name, the form shown in figure 7-3 will be displayed. The default password is exactly the same as the user's name. At this point you have the opportunity to set the access privileges for the user. You should contact the new user and recommend that they select their own password after they have logged into ChurchWatch for the first time. You can decide now or later on the user's access privileges.

To edit the user's name or access privileges, or reset their password at a later time, you can click the EDIT button (refer to figure 7-2). The same form shown in figure 7-3 will be displayed.

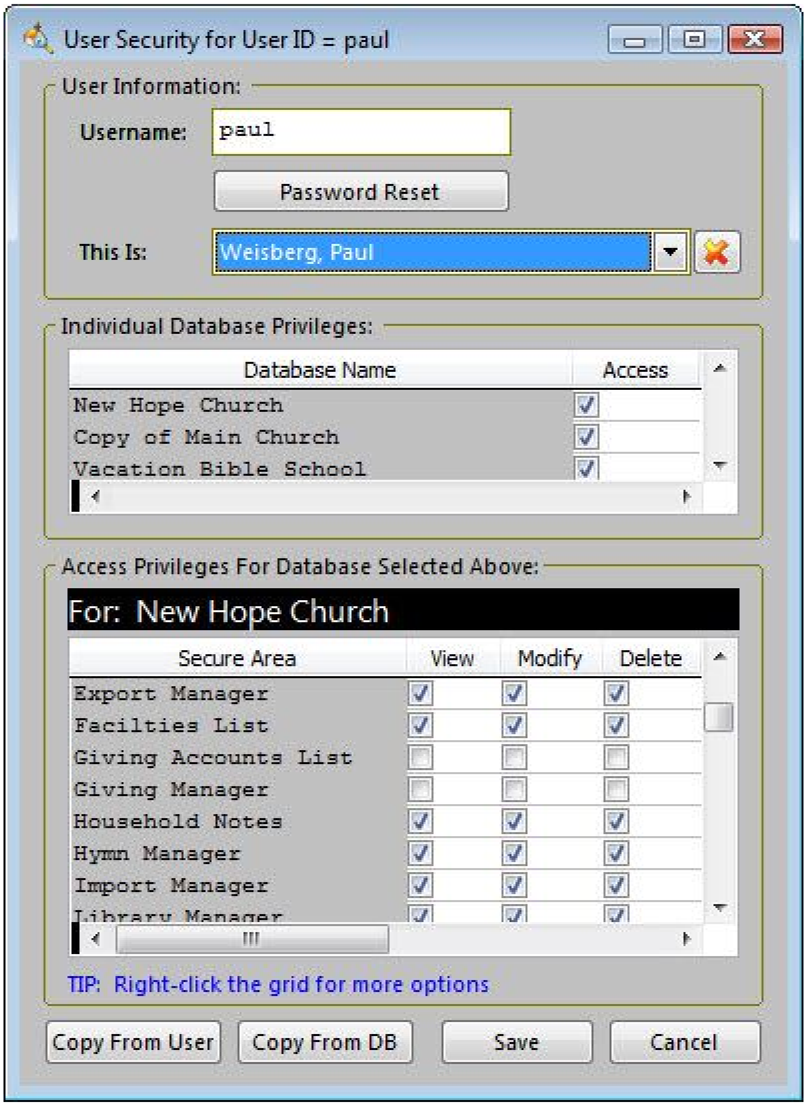



Figure 7-3 Security Details Form

### Modifying the User Name

In the Username field of the Security Details Form, you can modify the user's login name if so desired. Refer to figure 7-3.

### Resetting a User's Password

In previous versions of ChurchWatch, you were allowed to edit the user's password. This is no longer allowed. You can, however, reset their password using the PASSWORD RESET button. This feature is useful if a user forgets their password. This will reset the password to exactly match the user name. The user should log in to ChurchWatch using this new, temporary, password and then modify their password to something only they know.

## Identifying This User as Someone in the Membership

For use in the Schedule Manager to view "My Schedule", ChurchWatch needs to know who this user is with respect to the Membership Manager. You can assign a person using the drop down list beside the "This Is" label. Refer to Figure 7-3. Once set, this user can use the "My Schedule" feature of the Schedule Manager.

## Modifying Access Privileges

ChurchWatch provides the ability the modify the access rights of each user to a very detailed level. This allows certain parts of the program to be marked "off limits" for the user in question. Refer to figures 7-2 and 7-3 above. Select a user and click the EDIT button to edit the user's access rights. The Security Details form shown in figure 7-3 will be displayed. The first list allows you to control a users access to other church databases if you are using the multi-database features of ChurchWatch. With this list you can allow or disallow complete access to the data of the specified database and/or you can modify the detailed access rights for the selected database. Note that in ChurchWatch Version 5, you can now edit the access privilege details of EACH database. The security details are no longer global. Therefore, a user could have access to the Giving Manager in one database but not in another.

The second list labeled "Access Privileges" allows you to control the user's access to various parts of the ChurchWatch program within the selected database. Begin by clicking on a database name to make sure the context has switched. You can tell which database you are editing by looking at the title bar above the Access Privileges list. Next, find the detail item(s) of interest at the left side of the list and then check or uncheck the checkboxes at the right. You have a choice of View, Modify and Delete access. "View" access means that the user can view data. "Modify" means that the user can change what he or she sees. "Delete" means that the user can also delete records for the selected access item. For example, if you select the item "Giving Manager" and then check View but uncheck Modify and Delete, the user will have access to the Giving Manager but will not be able to modify or delete any of the data he or she sees there.

Be sure to click the SAVE button when exiting or all changes will be lost.

***Tip:*** *To greatly reduce data entry time, use the COPY FROM USER and COPY FROM DB buttons to copy all privileges from another, similar user or from the access privileges for this same user from another database, then make any necessary modifications.*

***Tip:*** *Be careful not to edit the wrong database. Double check the title bar above the Access Privileges and make note of which database you are editing the privileges for.*

## Deleting a User Account

To delete a user name, first select it from the list on the left side of the SECURITY page on the SETUP form. Then click the DELETE button. Deleting a user will also delete all the user's messages from the Message Manager.

***Note:*** *The "admin" account can never be deleted.*

***Tip:*** *User names and passwords are case sensitive, meaning that upper and lower case letters are significant. If you are having trouble logging on check your CAPS LOCK key.*

## Checking Who's Online

You can see who is currently logged into ChurchWatch by selecting FILE->WHOS ON from the top-of-screen menu. This feature is only available when security is turned on. If the same user is logged in more than once (not recommended) you will only see one instance here. You can also see the last login time which can help find "dead" or seldom used login names. The current user (you) is always shown in green.

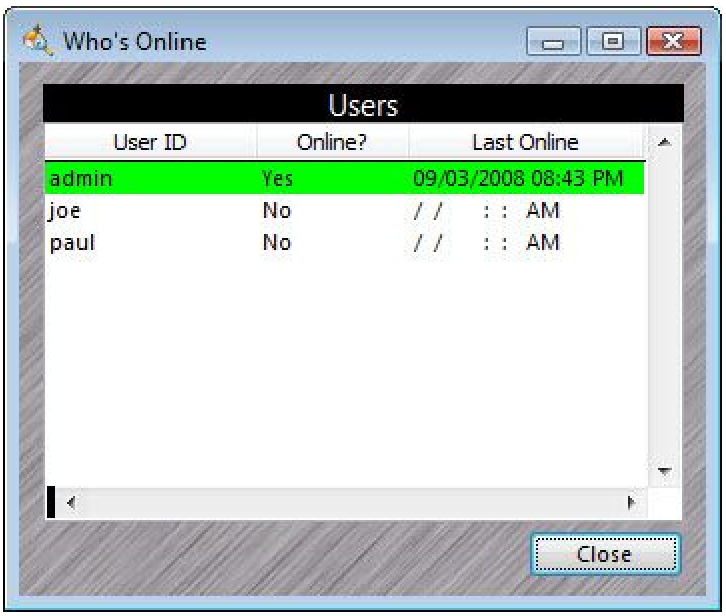



Figure 7-4 Viewing Who's Online

## Clearing the "Online" Flags

ChurchWatch keeps track of who is logged on at any given time as shown in figure 7-4. In the event of a power outage or PC crash, this information will be left corrupted. When this happens you may see more users logged in under FILE-WHOS ON than are actually logged in. In addition, the maintenance functions in the program, such as re-indexing the database, may return errors indicating that other users are logged on when in fact this is not the case. ChurchWatch Version 5, now automatically clears these flags eventually (after about 30 minutes). However, if you need to manually clear the flags or want to speed up the process, simply click the CLEAR ONLINE FLAGS button. You should only do this if you know you are the only user logged into ChurchWatch because all user online flags will be reset.

***Warning: If one or more of the clocks on your network PC's is out by 30 minutes or more, ChurchWatch may erroneously clear the online flags of certain users. Check and synchronize all your clocks.***

## Changing Your Password

Once you are logged into ChurchWatch you can change your password either by selecting FILE->SET PASSWORD or by using the CHANGE YOUR PASSWORD button on the USER PREFERENCES Page of the SETUP form.  You will need to enter your existing password and the new one.  Remember that passwords and user names are case sensitive.  Your password will be stored encrypted for further protection.  This feature is only available when security is turned on.

## What If I Forget My Password?

If you forget your password you will need to see the ChurchWatch Administrator.  The administrator will be able to reset your password.

If you are the "admin" user and you have forgotten your password you will need to contact White Mountain Software. Note that we will only give out access information to the contact person that purchased the software.  If your contact person leaves the church you should contact White Mountain Software so that we can update our records.

# Chapter 8 The Membership Manager


## Keeping Track of Your Membership and Contacts

Most churches purchase Church Management Software to at least keep track of names and addresses of people attending and visiting their church. ChurchWatch has a sophisticated Membership Manager to keep track of:

- family or household groupings (not all people in a household have to be related or even have the same last name)
- addresses (primary and alternate)
- family photo
- details about each person
- person photo
- church casual contacts and vendors (suppliers)
- businesses
- organizations

Most data in ChurchWatch is tied some way to the Membership so the Membership Manager should be the first place you start when you are a new user to ChurchWatch. Enter or import your membership so that other parts of the program are more useful.

Most fields in the Membership Manager are optional – you may track as much or as little as you want. However, you must, at the very least, enter a family name for a household and you must enter the gender and authority level for each person your add. Each household must have one and only one main contact person and each household can have at most one spouse.

The Membership Manager has a one-generation family tree view to allow you to quickly find and select a family or a person. As such, there are two levels in the Membership Manager: household and person. A household defines the common address and phone numbers for a family or a contact. Typically you create a family first and then you enter the names of the people belonging to the family. Note that family members can have different last names (handled in the person details) but only one common family name is entered as a reference at the household level - this is usually the last name of the main contact person of the household.

You can also use the Membership Manager as a simple way to keep track of contacts, vendors, businesses and organizations. Contacts are generally people outside of the church for which you need to store contact information. Vendors can be businesses that the church uses on a casual or frequent basis such as a local print shop. Businesses are businesses that give offerings and the same is true for organizations.

## The QuickSearch List

The QuickSearch List on the left controls what and who you are looking at. It is organized as a tree with Households (or business, vendor contact etc) shown at the parent level. To “open” a household, click the small “+” sign beside the household name. To close or collapse a household, click the small “-“ sign beside the household name. You can also check the “Auto Expand” checkbox to show all people in all households or uncheck this box to hide all people in all households.

## Selecting the View Mode

The Membership Manager has two view modes: Household and Person. The form completely changes based on the view mode you are in. To change the view mode, use the QuickSearch list on the left to choose either a household/business/vendor etc or a person. The form will change accordingly.

In summary, select household level by clicking on a household name in the QuickSearch list. Select person level by clicking on a person name in the QuickSearch list.

## The Input Form

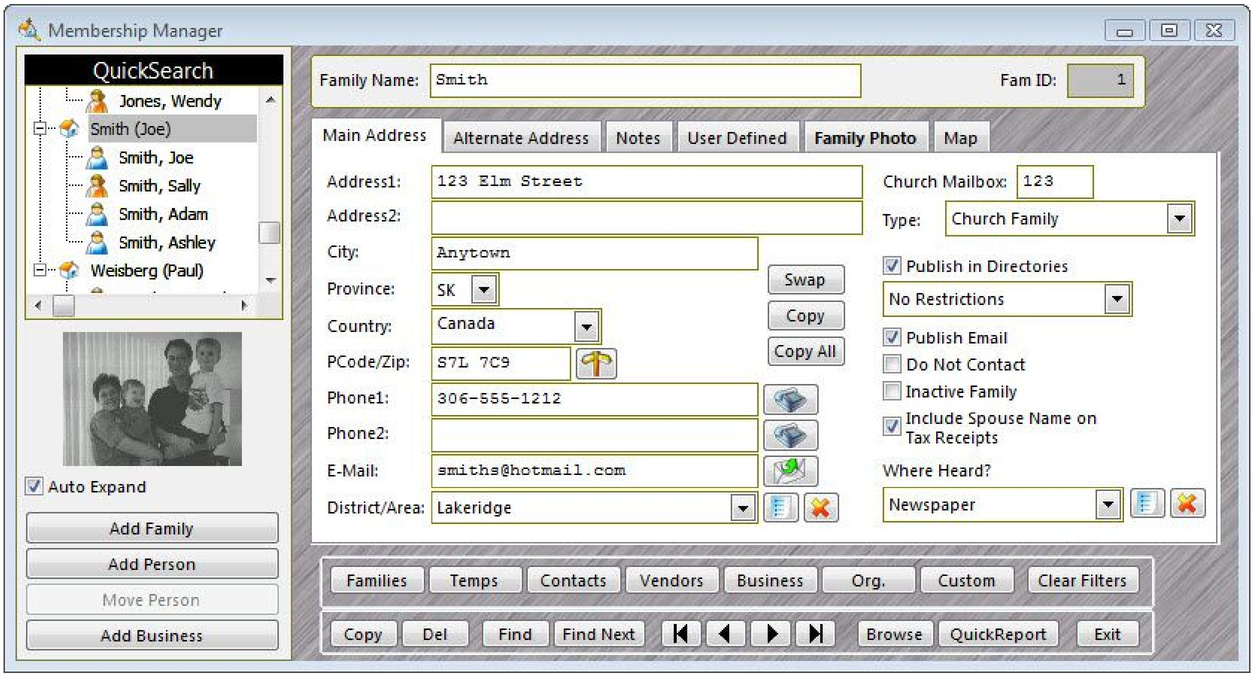


Figure 8-1 The Membership Manager

## Adding a Family

To add a new family, click the Add Family button. When prompted, enter the last name that will represent this household. If there are multiple last names in the household, we suggest you use the last name of the main contact. Be sure to set the "Type" of household up in the upper right of the form.

Next, you should enter people into this household since at least one person is needed in every household. Refer to the next section.

## Adding a Person

To add a person to the currently selected household, click the Add Person button.

***Tip:*** *People are always added to the current family. To create a new family, create the household first, then add people to the household.*

***Tip:*** *When adding family members (people) add them in authority order - Main contact first, then spouse, children, others. ChurchWatch will attempt to guess the gender and authority level as you enter the members. This feature reduces data entry time.*

## Moving a Person

You can move a person to another household by clicking the Move Person button. ChurchWatch will prompt you for the household you want to move the person to.

## Adding a Business For Giving Purposes

In ChurchWatch Version 5, it is now easy to add a business or organization for the purposes of receiving offerings. Click the Add Business button to start the process. ChurchWatch will ask you for the name of the business and then will automatically add the business and a single person in the business with a blank name. This is done because every "household" requires one person who is a main contact.

## Family and Person Photos

Family and Person photos can be shown directly under the QuickSearch list. If you do not use photos, you can turn off this feature in the Setup Manager on the User Preferences page. Not showing photos will free up more space for the QuickSearch list.

## Family ID

The family ID field is used internally by ChurchWatch. It cannot be modified but is sometimes a handy, unique reference.

## Household Level, Main Address Page

The Household Level has six (6) pages. The first is labeled "Main Address" and displays the primary address for the household or business. This is the address that will appear in all reports and church mailings. To make a change simply click the mouse in one of the data entry windows (e.g. City) and begin to type. On this page you can also set the type of household (church family, temporary giver, contact, vendor, business or organization). You can set the publishing level for church directories and whether or not the email address should be published in directories. There is also a checkbox for including spouse name on tax receipts for this family. Most items are self-explanatory.

***Tip:*** *Set the Country field before setting the State/Province field since the country defines the list of states or provinces.*

## Household Level, Alternate Address Page

The second page displays the secondary or alternate address for the contact or family. This is an excellent place to store seasonal addresses such as the summer cottage or winter get-away. Select this page by clicking on the page header. To make a change simply click the mouse in one of the data entry windows (e.g. City) and begin to type. Note that the alternate page header will be shown in bold as a reminder whenever there is data entered for the alternate address.

***Tip:*** *Set the Country field before setting the State/Province field since the country defines the list of states or provinces.*

## Household Level, Notes Page

The third page is used to enter unlimited free form notes about the family. There is a security level for this page so you can lock out certain users from accessing this page, thereby making the notes confidential if desired.

## Household Level, User Defined Page

The fourth page is labeled "User Defined" and it contains several fields that you can setup to be anything you want. To access this page click on the page header. The titles for these fields can be set on the SETUP form on the USER DEFINED FIELDS - HOUSE page (refer to Chapter 4). Table 8-1 lists the user defined fields, their types and allowable field lengths.

| Field Name | Type | Length | Decimals |
|---|---|---|---|
| Char Field #1 | alphanumeric (text and numbers) | 30 | |
| Char Field #2 | alphanumeric (text and numbers) | 30 | |
| Num Field #1 | numeric | 7 | 0 |
| Num Field #2 | numeric | 7 | 2 |
| Check #1 | logical (true/false) | | |
| Check #2 | logical (true/false) | | |

Table 8-1 User Defined Fields, Household Level

## Household Level, Family Photo Page

The fifth page is labeled “Family Photo”. Use this page to store and maintain a family photo. You can also enter caption text here to describe the people in the photo and the order they appear in. The caption will appear in photo directory reports.

You can use this feature to create color or black and white photo directories. BMP, JPG and GIF files are allowed. You can create a church photo directory by using the Report Manager, Directories.

You can also display the family photo in the Membership Manager under the QuickSearch list. To turn on this behavior, click the “Show family photos on household form” checkbox in SETUP->USER PREFERENCES. An example of this behavior is shown in figure 8-2.

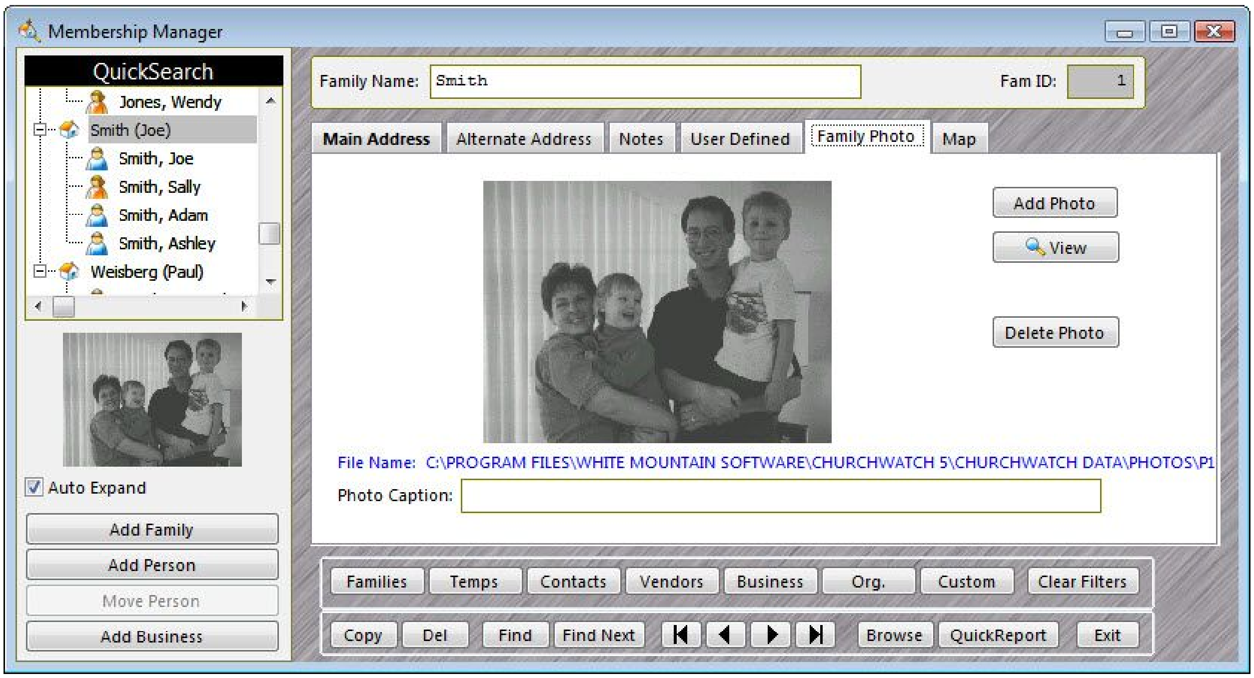



Figure 8-2 Family Photo Page

## Real Time Maps

The sixth page is labeled "Map". If you are connected to the internet and the mapping feature is enabled (refer to chapter 4), then you can view online maps on page six. Click the Refresh button to reload the map. Click the Print button to print a copy and click the Zoom button to launch your web browser for a larger view of the map.

Maps are useful for visitations since they pinpoint the location of the residence. An example is shown in Figure 8-3.

You can control various aspects of the map behavior on the Maps page of the Setup Manager (refer to chapter 4).

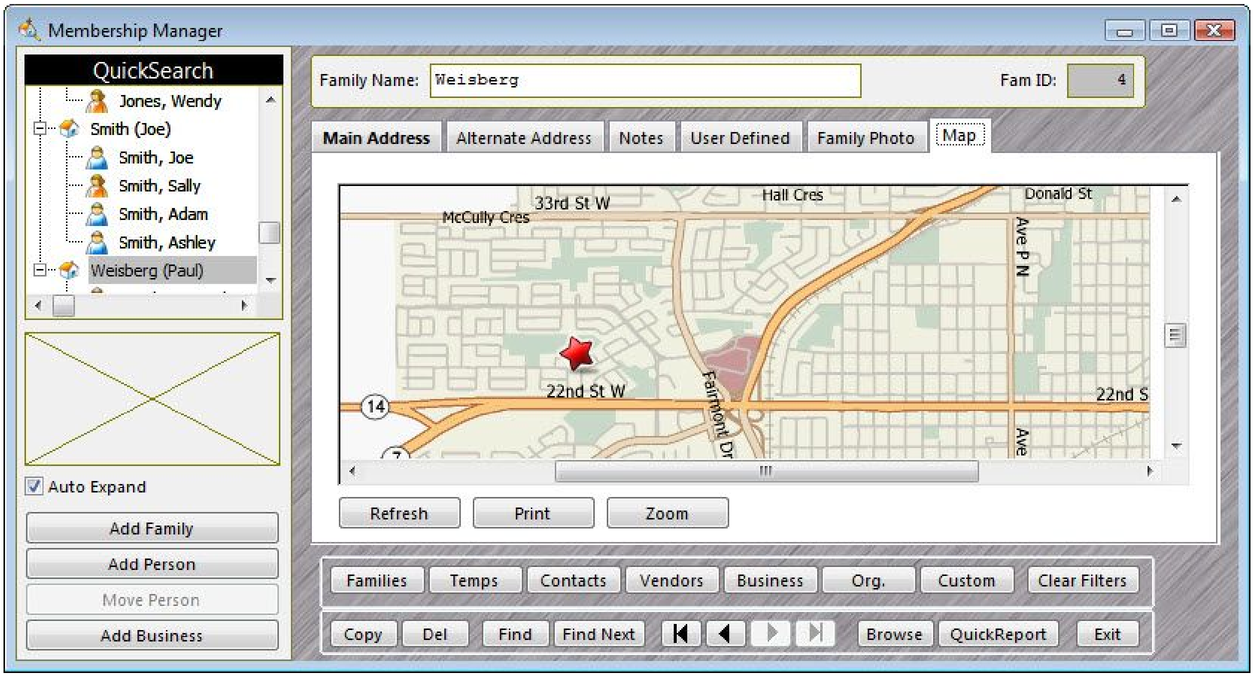



Figure 8-3 Maps Page

## Church Directories

ChurchWatch provides several church directory and photo directory reports. Occasionally families do not wish to be published in the church directory. In addition, you probably do not want to list casual visitors, contacts and vendors in the church directory. The "Publish in Directories" checkbox is used to indicate if this family/household should be published or not. Check the box to publish a family or uncheck it to hide the family from church directory reports. You can also specify the level of detail that you want published. Choices are No Restrictions, Publish Name and Address, Publish Name and Phone, and Publish Name Only. You can also publish or hide the email address in any directory that contains email addresses by checking or unchecking the "publish email" checkbox.

## Type of Contact

The Membership Manager can keep track of several types of contacts. The type is selected on the Main Address page. "Church Family" refers to a family that either attends regularly or is a casual visitor. "Temporary Giver" refers to someone who gives an offering (and must therefore be tracked for tax purposes) but does not attend church regularly. Temporary Givers can be automatically deleted at year end when the giving and pledge data is archived. This item is discussed in more detail in the Giving Manager, chapter 10. "Contact" refers to a person or family outside of the church that you need to store contact information about. "Vendor" refers to a business that the church works with or any business for which you want to store contact information about. "Business" and "Organization" can be used for businesses or organizations that donate offerings to the church.

***Tip:*** *Anyone stored in the Membership Manager can give an offering regardless of the type of contact but we recommend that you receive offerings from church families, temporary givers, businesses and organizations only..*

## Include Spouse Name on Tax Receipts

In ChurchWatch, offerings are credited to people, not families at data entry time. This is described in more detail in chapter 10. However, it is possible to include a spouse name on the tax receipt, thereby giving the appearance that the offering is credited to the couple. To select this behavior for the current household, check the "include spouse name on tax receipt" checkbox on the Main Address page.

## Inactive Families

A family can be marked "inactive" on the Main Address page. At this time, this feature is used only as a list filtering option in the Giving Manager and during attendance entry in the Schedule Manager.

## Household Level, Form Buttons

This section describes each of the buttons at the household level.

| Button Title | Description |
|---|---|
| Add Family | Click this button to create a new household. You will be prompted for the family name. This is usually the last name of the main contact. |
| Add Person | Click this button to add a person to the currently selected household. You will be prompted for the first name. |
| Move Person | Click this button to move the currently selected person to another household. |
| Add Business | Click this button to quickly add a Business. After adding, you can change the type field to contact, vendor, business or organization. |
| PAGE 1/PAGE 2 | |
| Swap | Click this button to swap the main and alternate addresses for the current family. Handy when families move out to the cottage for the summer. |
| Copy | Click this button to copy the address presently in view to the Windows clipboard. You can then "paste" the address into any other Windows application. The paste operation in most Windows applications is CTRL-V. You may also find it under EDIT-PASTE in the top-of-screen menu for the application of interest. This feature is very handy for copying formatted addresses into word processors and spreadsheet applications. |
| Copy All | Click this button to copy ALL addresses to the Windows clipboard. This operation obeys the current filter in effect (see chapter 29) so you can create custom lists. You can then "paste" the data into any other Windows application. The paste operation in most Windows applications is CTRL-V. You may also find it under EDIT-PASTE in the top-of-screen menu for the application of interest. This feature is very handy for exporting all addresses into word processors and spreadsheet applications for example. |
| Pcode/Zip Sign Post | Click the sign post button to have ChurchWatch access the internet to produce a map showing the location of the address based on the street address and/or postal code or zip code. At the very least, the postal/zip code must be valid and you must have a "live" connection to the internet. The map will appear either on the "Map" page in the Membership Manager or in your web browser depending on your map settings in the Setup Manager. |
| Phone | Click the phone buttons to open the phone dialer. |
| Email | Click the email button to open your email program with the email address of this family already filled in for you. Be sure to setup your email options on the SETUP->EMAIL page first. |
| List Buttons | The buttons with the small list icon in them display the appropriate list editor. |
| Delete (Red X) Buttons | The buttons with a red "X" icon clear the associated field. |
| PAGE 5 | |
| Add Photo | Click this button to specify the filename of the family photo. BMP, JPG and GIF files are supported. |
| View | Click the View button to zoom in on the photo. |
| Delete Photo | Click the Delete button to delete the family photo. |
| BUTTONS | |
| Families | Click this button to show church families only. |
| Temps | Click this button to show temporary givers only. |
| Contacts | Click this button to show contacts only. |
| Vendors | Click this button to show vendor names only. |
| Business | Click this button to show businesses only. |
| Org. | Click this button to show organizations only. |
| Custom | Click this button to set a custom data filter of your design. Refer to chapter 29. |
| Clear Filters | Click this button to clear the current data filter. |
| Copy | Click the COPY button to copy an entire household/family to another database. You must have the destination database already defined (created in SETUP->CHURCH INFO->SETUP OR EDIT ANOTHER DATABASE). |

| Button Title | Description |
|---|---|
| Del | Click the DEL button to delete the current family or contact and all people within the family or contact. If the family or members of the family have made giving contributions, ChurchWatch will not permit you to delete until after the data is archived at year end. |
| Find | Click the FIND button to find a family or contact by name. When doing a find, only the first few letters of the name of interest need to be entered. The find will locate and show the first occurrence found. |
| Find Next | Repeats the last find. This is handy if you have more than one family with the same last name since the FIND button will only find the first occurrence. Note that Find Next does not work with the Super Search. |
| \|< | Click this to go to the first household record in the list. |
| << | Click this to go back one household. |
| >> | Click this to go forward one household. |
| >\| | Click this to go to the last household record in the list. |
| Browse | Click this to view all households in a spreadsheet format. |
| QuickReport | Click this to get a quick report of all households in the current data filter or if no filter is in effect, all households. |
| Exit | Click this to exit the Membership Manager. |

Table 8-2 Household Level Button Summary

## Person Level

ChurchWatch is capable of storing almost limitless information about the People in or associated with your church through use of the person level in the Membership Manager. The person level is organized as a series of pages or file cards with logically grouped information on each page. Refer to figure 8-3 for an example of the person level pages. You can also refer to the same figure throughout this chapter as a reference.

Although the amount of data you can store with the Membership Manager might seem a bit daunting at first, most data entry fields are optional. Use only what you need. As a rule you should fill in the first and last name, the gender and the authority fields. We also recommend setting the title but this is not necessary.

***Note:*** *Every person you add in the Membership Manager is automatically assigned to the current family. To create a new family with new members use the Add Family button.*

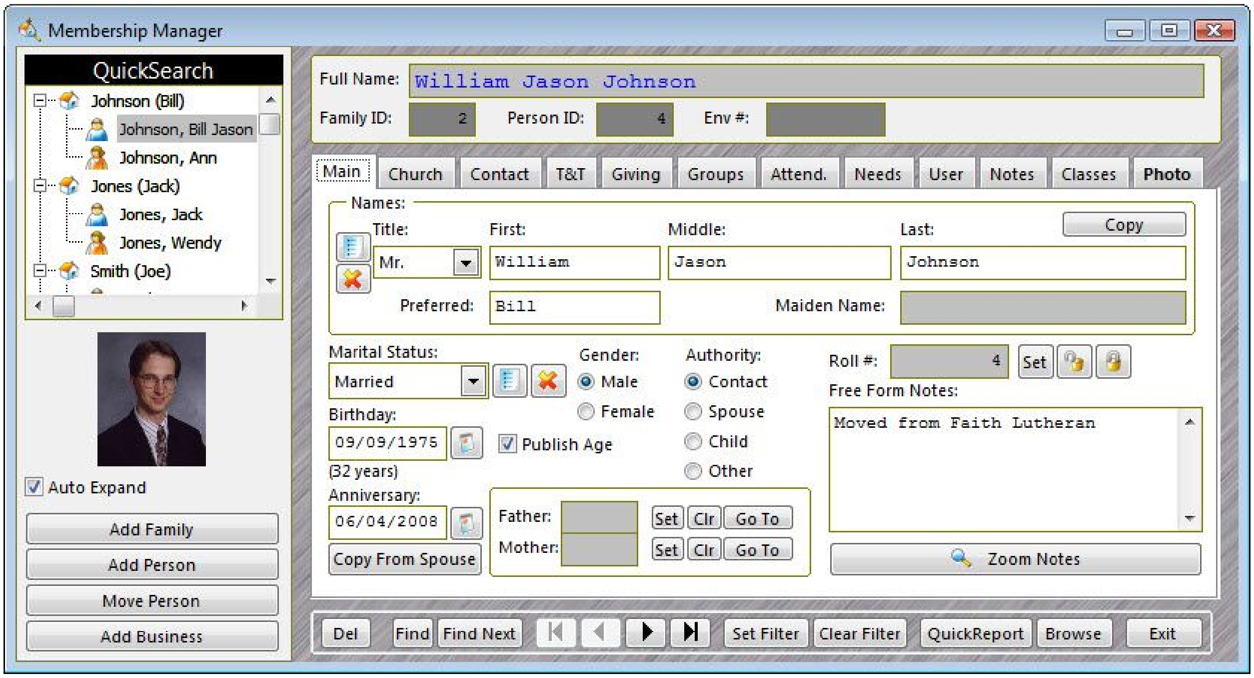



Figure 8-4 Membership Manager, Person Level

The person level is made up of twelve (12) pages:

| Page Title | Description |
|---|---|
| Main | Personal information such as names, gender, authority, marital status, free form notes. |
| Church | Information that is church related such as membership level, key dates etc. |
| Contact | ChurchWatch is capable of storing extensive contact information for a person including several phone numbers, work related information and email addresses. There are also two user defined phone numbers on this page (or any other form of information you might want to store). |
| T&T | T&T stands for Time and Talents. This page is a summary of each persons ministry skills, general skills, spiritual gifts, interests, hobbies etc. |
| Giving | The Giving page is a summary of a person's giving and pledges year-to-date. The page is viewable only if you have been given giving access privileges and the information is read-only. This is also where you assign an envelope number. |
| Groups | This page is a summary of all church groups the current person belongs to. |
| Attend. | This page gives an attendance summary for the current person. You cannot enter data on this page. |
| Needs | This page is a summary of all special needs the current person has. |
| User | If you need to store a specific item of interest and ChurchWatch does not provide a field, you can create several user defined fields. The User Def. page is where you would enter your user-defined data. You can also set the field titles in the SETUP form on the USER DEFINED FIELDS - PEOPLE page. |
| Notes | This page holds confidential pastor's and Class notes for the current person. You must have access privileges to be allowed to view this page. |
| Classes | This page contains summary information pertaining to classes. The information here is quite extensive but most of it must be modified in the Sunday School/Class Manager, not here. |
| Photo | Use this page to specify and view a photo file for the current person. |

Table 8-3 Person Level Page Summary

## Family ID, Person ID and Envelope # Fields

These fields are found at the top of the form. They are used internally by ChurchWatch and cannot be modified. Envelope numbers are entered on the “Giving” page of this form, not here.

## Full Name

You can tell who the current person is that you are editing by looking at the top of the form. The full name of the individual is always displayed here. In the example shown in figure 8-4 the current person’s name is “William Jason Johnson”.

## Person Level, Main Page

This page contains general personal information about the current individual. This is the only page that contains information that you must enter - specifically the name, gender and authority fields. We also recommend that you enter the title field but it is optional.

The COPY button inside the Names box is used to copy the full name and address of the current person to the Windows clipboard. You can then “paste” the information into any other Windows application such as word processors, spreadsheets etc. As an example, we have used the COPY button to copy the information from figure 8-4 above into this User’s Guide:

William James Johnson
123 Elm Street
Anytown, ON L1L 1L1
CANADA

If you enter a birthday or anniversary date, ChurchWatch will automatically calculate the age or years married and print this information under the field. ChurchWatch always uses 4 digit years. If the person doesn’t want their age published, uncheck the “Publish Age” checkbox.

The Roll Number is currently not used anywhere but if you use roll numbers you can enter one here or click the SET button to have one assigned. Roll Numbers should be unique amongst all people.

The Free Form Notes box is used to enter any textual information or notes you desire. The ZOOM NOTES button directly below the notes is used to open an edit window and give you more room to work on the notes.

You can also track family history and family trees by setting the Father and/or Mother fields on this page. Use the SET buttons to set the Father or Mother or the CLR buttons to clear the field. Use the GO TO button to go to the Father’s or Mother’s record. The data displayed in the Father and Mother fields is the person ID of the Father or Mother respectively.

## Defining Titles and Marital Status Types

To keep ChurchWatch as flexible as possible, we have allowed you to enter your own titles and marital status types. You can find more information about this in chapter 6. To access the defined titles or to create a new one, click the button to the immediate left of the title box. To create a new marital status or view the existing list, click on the button to the immediate right of the marital status box.

## Person Level, Church Page (Key Dates, Visitors and Prospects)

The Church page contains all information specific to the church. This includes key dates such as baptism, confirmation, commitment etc. You can create your own key date names by clicking the EDIT DATE NAMES button. You can enter or modify the actual dates directly on this page. Note that these dates are independent from the dates used in the Registers Manager.

You can use this page to set a person's membership level. Click the button to the right of the membership field to edit the list of membership types available.

You can also indicate if a person is a prospect by checking the prospect box. There are reports in the Report Manager pertaining to prospect tracking.

Although ChurchWatch has a Visitor Manager, visitors are actually created in the Membership Manager on this page. Check the "Person is A Visitor" checkbox to indicate that the current person is a visitor. Once marked as a visitor, this person will also show up in the Visitor Manager.

On this page, you can also indicate if a person is a staff member. Life Verse can also be recorded.

## Person Level, Contact Page (Contact and Work Related Information)

Use this page to enter extensive contact information for the individual including phone numbers, work related information, email addresses and personal web page.

There are also two (2) user defined phone numbers on this page. You can set the titles for these fields in the SETUP form on the USER DEFINED FIELDS - PEOPLE page. Each field contains 30 characters and can actually be set to anything you want, not just phone numbers.

This page also contains a sample mailing label with address and phone numbers for convenience so that you can view a person's address and household phone numbers without flipping back and forth to the Membership Manager.

## Person Level, T&T (Time and Talents) Page

The Time and Talents (T&T) page is a summary of an individual's ministry skills, general skills, spiritual gifts, interests, hobbies etc. To add a Time and Talent to a person, select an item from the list at the left and move it to the list at the right using the right facing arrow button. Similarly you can remove a Time and Talent from a person by selecting one from the list at the right and then clicking the left facing arrow button. To modify the list of available Time and Talents click the TIME AND TALENT EDITOR button on this page.

## Person Level, Giving Page

The Giving page is viewable only if you have been given access to the Giving Manager and tables. The Giving page gives a summary of a person's giving and pledging year-to-date. Note that the data in the table cannot be modified on this page. If there is more data than can be shown on one page you can use the scroll bar to scroll down or click the BROWSE button under the table to open a spreadsheet style window.

### Envelope Numbers

Envelope numbers are optional but if you want to use them they can be assigned on the Giving page. ChurchWatch keeps track of last year's, this year's and next year's envelope numbers. You have the choice of either entering the envelope number yourself or clicking the SET button to have ChurchWatch select the next available number for you. The SET button affects this year's envelope number only. Envelope numbers are numeric and cannot contain letters. You should note that envelope numbers are completely optional in ChurchWatch. If you prefer, you can use the person's name when entering giving data in the Giving Manager.

**Envelope Number Shifting**

ChurchWatch always uses this year's envelope numbers in all operations. However, you can enter next year's envelope numbers in the Next Year field. When you are ready you can do an "envelope shift". An envelope shift moves the Next Year envelope number into the This Year field. The This Year field is moved to the Last Year field and the old Last Year value is shifted out (deleted). You can enter the Next Year envelope numbers at any time. An envelope shift would likely be done in a new giving year after archiving your giving data. A powerful envelope shift wizard is provided to assist you in this operation.

Click the shift button (up arrow) below the envelope numbers to display the Envelope Number Shift form. Refer to figure 8-5. The Envelope Number Shift form is powerful but complex. Study it and this user's manual carefully before attempting a shift.

***IMPORTANT:*** *Be sure to do a backup before attempting any operations found on this form. The envelope shift cannot be undone.*

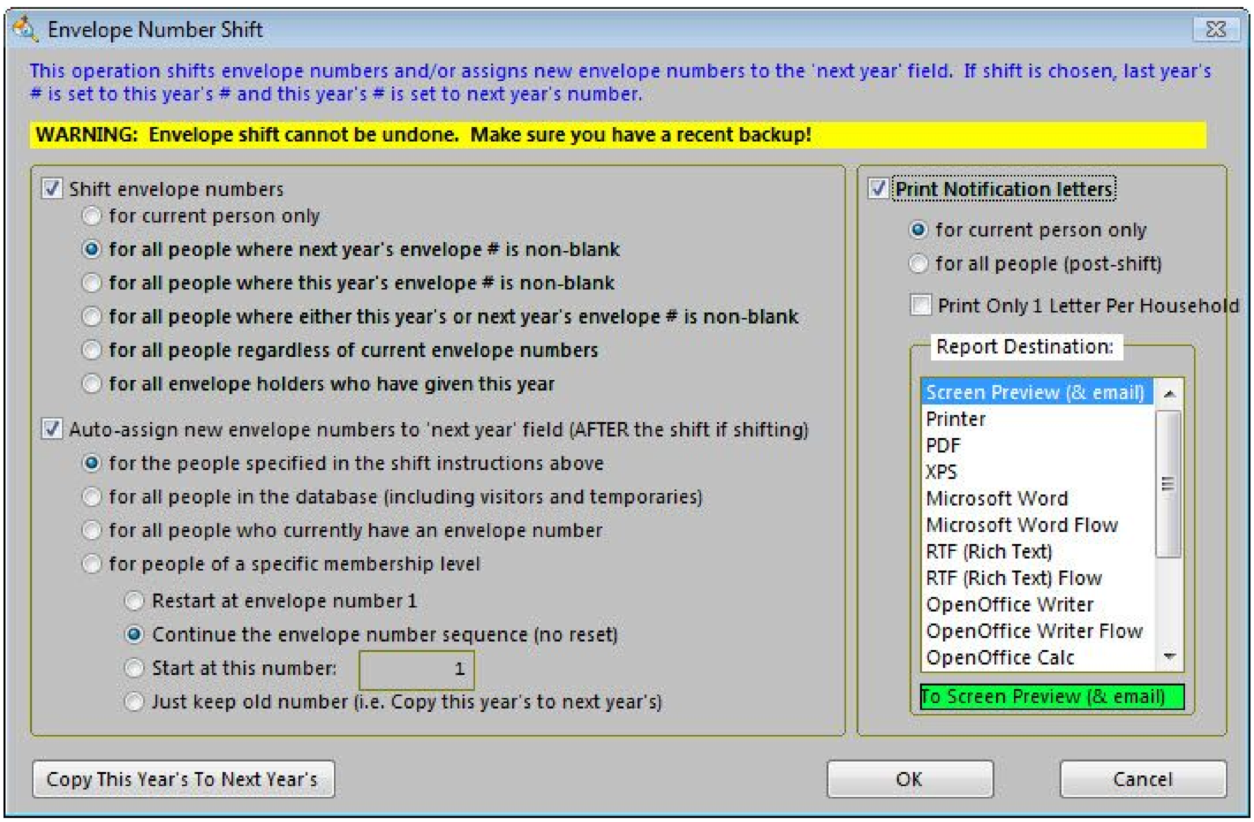


Figure 8-5 Envelope Shifting

There are several operations available to you here:

1. Shifting the envelope numbers
2. Auto assigning new envelope numbers into the Next Year field
3. Printing notification letters
4. Copy this year's envelope numbers to next year

If this is the first time you have used the envelope shift, you will likely want to "seed" the next year's envelope numbers first. Otherwise there is nothing to shift (or you will have to manually enter the next years envelopes). You can either click the COPY THIS YEAR'S TO NEXT' YEAR'S or use the auto assign feature to seed next year's envelope numbers.  For that reason we will discuss these features first.

### Copying This Year's Envelope Numbers to Next Year

Click the button in the bottom left of the form to copy this year's envelope numbers into the next year field.  This operation is performed for ALL people.  This operation is a quick way to seed the next year's envelope numbers.  This would likely only be used once because if the envelope numbers truly aren't changing, there is no reason to use the envelope number shift in the first place.

#### Auto Assigning Next Year's Envelope Numbers

To auto assign next year's envelope numbers, begin by checking the auto assign checkbox. This will enable the options underneath this checkbox. Next, decide if you want to limit the auto assign to a specific set of records and select one of the items below the checkbox. Next, decide how you want the program to decide on the new envelope numbers. You can chose one of: restart at envelope number 1, continue the envelope numbers (first envelope number generated will be one more than the largest number used this year), specify a start number or just copy (keep) the existing number. When you are satisfied with all sections, click the OK button to perform the operation(s).

#### Shifting Envelope Numbers

To shift envelope numbers begin by checking the "Shift Envelope Numbers" checkbox. This will enable the options underneath this checkbox. Choose one of the options. This operation will shift the envelope numbers back one year (Next Year gets moved to This Year etc). Click the OK button when you are satisfied with the options to perform the shift.

#### Sending Notification of the New Envelope Numbers

This form even includes a handy way to notify families/people of their new envelope numbers by sending out letters. To perform this operation, click the "Print Notification Letters" checkbox. Next decide if you want to print for the current person only or for all people. You can also decide if you want one letter per household or one letter per person. A word of caution, though, when selecting one letter per family, the program will do exactly that, even if members of the family have different envelope numbers. Also choose an output destination. Then click the OK button to perform the operation.

**Tip:** Note that you can send emails or print mailing labels (complete with the envelope number) by using the Mail Manager. The Mail Manager provides much more flexible notification options than are provided here.

## Person Level, Groups Page

The Groups page is a summary of groups an individual belongs to. This is an excellent way to track small groups, cell groups, church board members etc. To add the person to a group, select a group from the list at the left and move it to the list at the right using the right facing arrow button. Similarly you can remove the person from a group by selecting a group from the list at the right and then clicking the left facing arrow button. To modify the list of available groups or to create new groups click the GROUP EDITOR button on this page.

## Person Level, Attend. Page

The Attendance page is a read-only page that gives a summary of a person's schedule and past attendance history for both church events and Sunday school. The list at the left, labeled "Schedule", is a list of the church events the person is required at, Sunday school classes the person is enrolled in, and classes the person is teaching (rows shown in light blue indicate a class the person is teaching). The list at the right, labeled "Attendance History", is a list of all events and classes that the current person has attended in the past.

## Person Level, Needs Page

The Needs page is a summary of an individual's special needs such as allergies and disabilities. To add a special need to a person, select an item from the list at the left and move it to the list at the right using the right facing arrow button. Similarly you can remove a special need from a person by selecting one from the list at the right and then clicking the left facing arrow button. To modify the list of available needs click the NEED EDITOR button on this page.

## Person Level, User Def. Page

In keeping with the flexible design of ChurchWatch, this page contains a block of user defined data entry fields. You can make these fields anything you want. The titles for these fields can be set on the SETUP form under the page USER DEFINED FIELDS -> PEOPLE. Table 8-4 lists the data types and lengths of each of the user defined fields.

| Field Name | Type | Length | Decimals |
|---|---|---|---|
| Character #1 | alphanumeric (text and numbers) | 30 | |
| Character #2 | alphanumeric (text and numbers) | 30 | |
| Character #3 | alphanumeric (text and numbers) | 30 | |
| Character #4 | alphanumeric (text and numbers) | 30 | |
| Character #5 | alphanumeric (text and numbers) | 30 | |
| Character #6 | alphanumeric (text and numbers) | 30 | |
| Checkbox #1 | logical (true/false) | | |
| Checkbox #2 | logical (true/false) | | |
| Checkbox #3 | logical (true/false) | | |
| Numeric #1 | numeric | 7 | 0 |
| Numeric #2 | numeric | 7 | 0 |
| Numeric #3 | numeric | 7 | 2 |

Table 8-4 User Defined Fields, Membership Manager, Person Level

## Person Level, Notes Page

This page contains Pastor's confidential notes and Class notes. This page is treated as confidential and only those users who have been given access rights to the page are allowed to view it. Each edit window contains free form notes and may contain any text. There is no limit to the amount of text you can enter.

If the edit window is grey in color it indicates that you have not created a note pad for this person. Click the appropriate CREATE NOTES button to open a notepad. When a note pad has been created the window will be shown in white. Whenever the window is white you can type text directly into the window. To expand the window for easier editing click the appropriate ZOOM NOTES button.

Use DELETE NOTES to delete the notes.

## Person Level, Classes Page

The Classes page contains all class related information for an individual. There is a list for each of:

- Current Classes - all classes the current individual is enrolled in
- Classes Achieved - all classes the current individual has graduated from
- Special Awards - all awards the individual has acquired
- Classes Taught - all classes the current individual has taught or is teaching

There are also several buttons on this page. To delete an achieved class, first select one from the list and then click the DELETE SELECTED button.

The ADD, EDIT (identified by a list icon) and DELETE buttons perform operations on the Special Awards list. The ADD button adds a special award to the current individual. The EDIT button displays the Special Awards list so you can add or remove special award names. The DELETE button deletes the selected award from the current individual.

You can delete a class taught by selecting one and then clicking the DELETE SELECTED button under the list.

## Person Level, Photo Page

The Another useful feature of ChurchWatch is the handling of personal photos. The Personal Profile report includes a color or black and white photo if you have one entered. BMP, JPG and GIF files are allowed. To add a photo click the ADD button. Select the photo file that contains the photo for the current individual. Click the DELETE button to delete the photo or click the VIEW button to view a larger copy of the photo. The view window can be resized as needed.

You can also display the family photo in the Membership Manager under the QuickSearch list. To turn on this behavior, click the “Show family photos on household form” checkbox in SETUP->USER PREFERENCES. An example of this behavior is shown in figure 8-6.

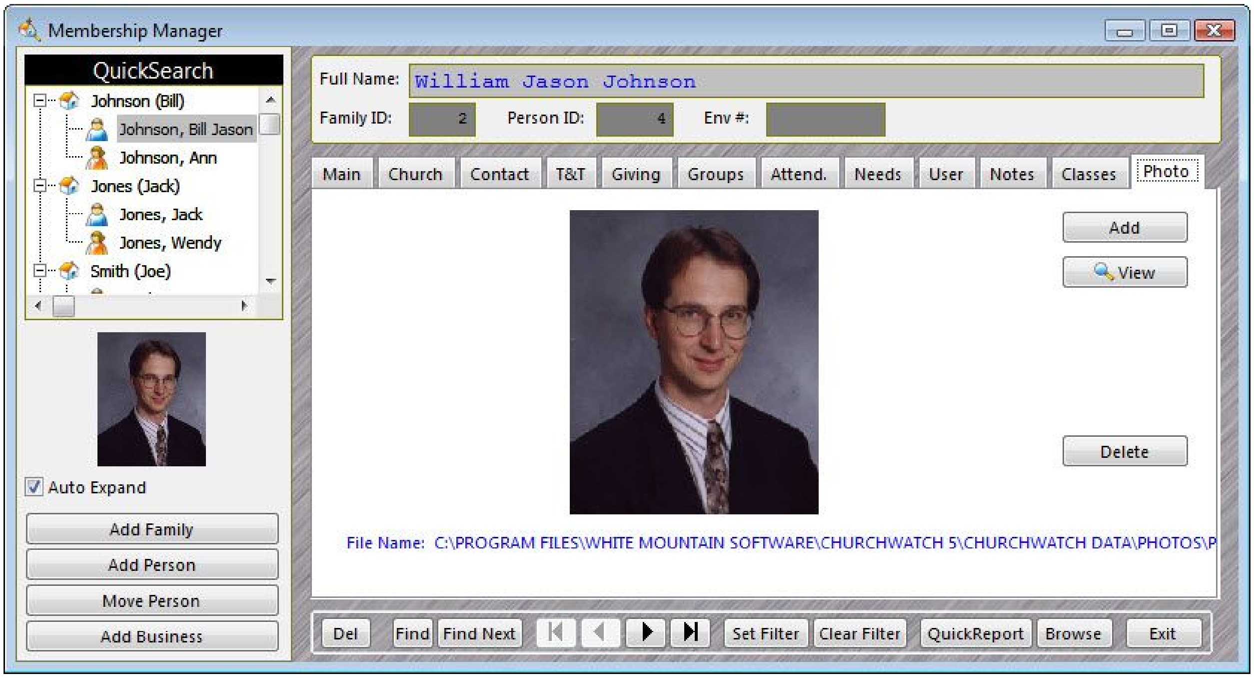



Figure 8-6  Person Photos

## Person Level, Form Buttons

Table 8-5 lists all form buttons not already explained:

<table>
<tr><th>Button Title</th><th>Description</th></tr>
<tr><td>Del</td><td>Click the DEL button to delete the current person. If the person has made giving contributions, ChurchWatch will not permit you to delete the record.</td></tr>
<tr><td>Find</td><td>Click the FIND button to find a person by last name. When doing a find, only the first few letters of the last name of interest need to be entered. The find will locate and show the first occurrence of the last name you entered. You can also right-click your mouse in any field to do a SuperSearch.</td></tr>
<tr><td>Find Next</td><td>Repeats the last find. This is handy if you have more than one person with the same last name since the FIND button will only find the first occurrence.</td></tr>
<tr><td>|<</td><td>Click this to go to the first person in the list.</td></tr>
<tr><td><</td><td>Click this to go back one person.</td></tr>
<tr><td>></td><td>Click this to go forward one person.</td></tr>
<tr><td>>|</td><td>Click this to go to the last person in the list.</td></tr>
<tr><td>Set Filter</td><td>Click this button to set a data filter. Refer to chapter 29.</td></tr>
<tr><td>Clear Filter</td><td>Click this button to clear the current data filter.</td></tr>
<tr><td>QuickReport</td><td>Click this to get a quick report of all people in the current data filter or if no filter is in effect, all people.</td></tr>
<tr><td>Browse</td><td>Click this to view all people in a spreadsheet format.</td></tr>
<tr><td>Exit</td><td>Click this to exit the Membership Manager.</td></tr>
</table>

Table 8-5 Person Level Button Summary

## How to Handle Deceased People

When a person becomes deceased, you can either delete them or leave in the database but marked as deceased.

### Deleting Deceased People

You can delete a deceased person by selecting them in the QuickSearch list and then by clicking the DEL button near the bottom of the form. However, if the person has offering records, deleting is not allowed. In this case, you must either wait until year-end (after archiving you will be able to delete the person) or move their offerings to the spouse. If the former is preferred, please refer to the next section. If the latter is preferred, there is a button in the Giving Manager on the SOLUTIONS page to move all offerings from a deceased person to the spouse. Move the offerings and the delete the person. Note that it is usually permissible to issue tax receipts to deceased persons. The receipt will be used in the final tax forms of the estate. How you handle this is up to you.

Secondly, each household must have one and only one main contact. If the deceased person is a main contact, you will need to mark the spouse as the new main contact in the household. If the deceased person is the only person in the household, you will need to delete the household also.

### Leaving Deceased Persons in the Database

To mark a person as deceased, select the person in the QuickSearch list. Next, go to the CHURCH page. On the right side, there is a checkbox for deceased. Check this box and enter the date of death. The person's name will always be shown in light blue color to indicate that this is a deceased person. It is permissible to issue tax receipts to deceased people.

You can also use the Death Register in the Registers Manager to record more information about this person such as burial date and place etc.

Deceased persons may be deleted at any time, provided that they have no offering records in the current giving year. If you wish to delete a deceased person refer to the previous section.


## *Chapter 9 The Visitor Manager*

The Visitor Manager is used to track details about your church visitors.  Visitors are stored in the Membership Manager just like any other person and must be marked as a visitor there.  Refer to figure 9-1.  Only people marked as a visitor will show up in the Visitor Manager.

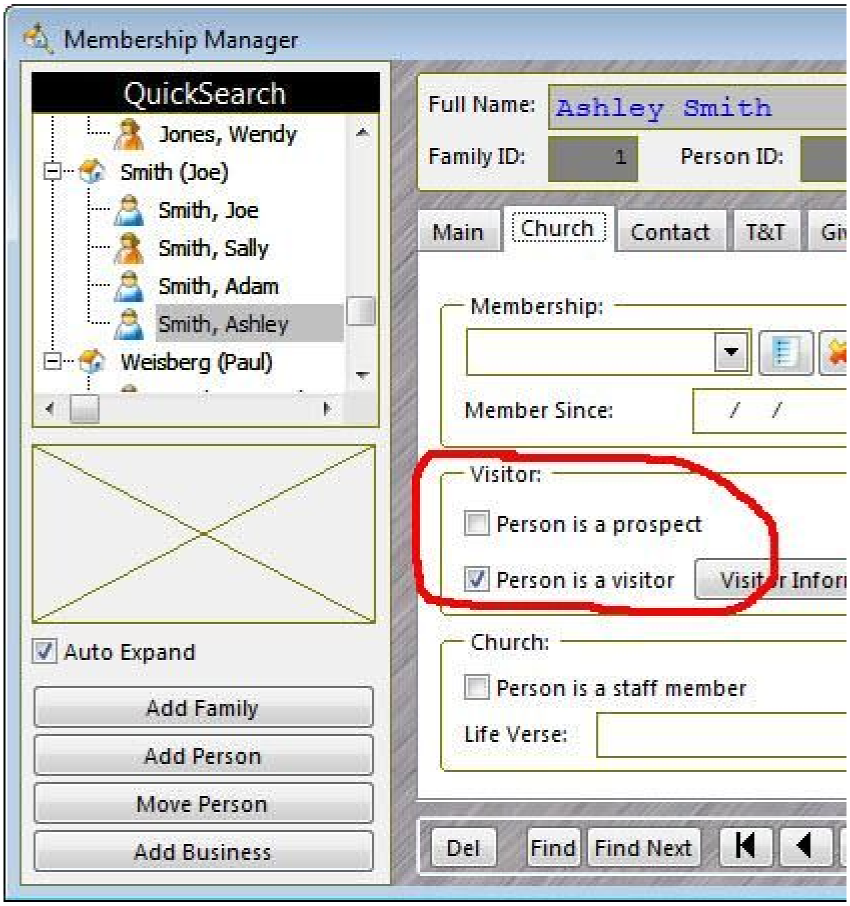



Figure 9-1  People Must Be Marked as a Visitor in the Membership Manager

The VISITOR INFORMATION button, found on this page, will launch the Visitor Manager.  You can also launch the Visitor Manager from the Main Menu or from the top-of-screen menu under the FORMS selection.

## Form Fields

This section describes the Visitor Manager form. Refer to figure 9-2 throughout.

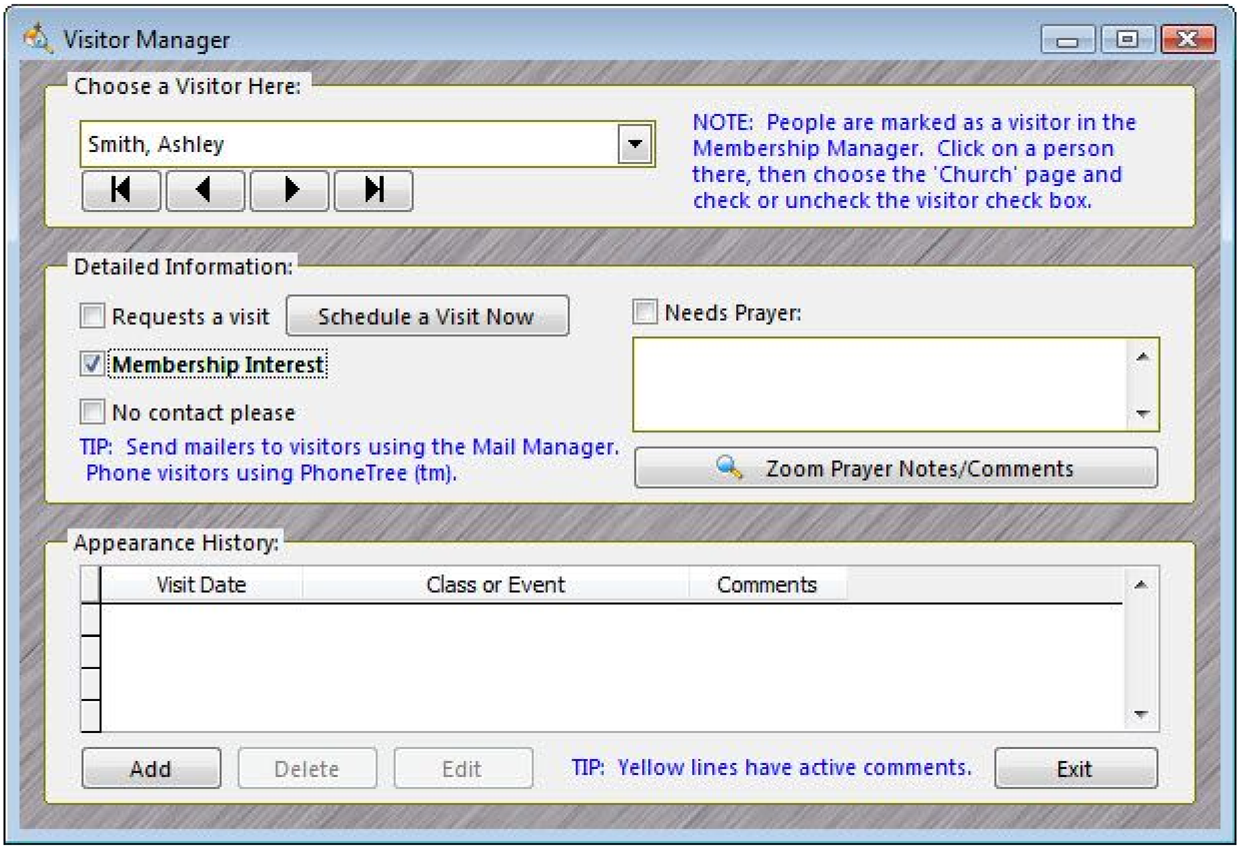



Figure 9-2 The Visitor Manager

Table 9-1 lists all form items:

| Form Item | Description |
|---|---|
| Visitor Name | Choose the visitor you want to work with from this drop down list. |
| \|< | Go to the first visitor. |
| < | Go back one visitor. |
| > | Go forward one visitor. |
| >\| | Go to last visitor. |
| Request a Visit | Check this box if person requests a visit. Click the SCHEDULE A VISIT NOW button to schedule a visit. |
| Membership Interest | Check this box if person is interested in membership. |
| No Contact Please | Click this button to note that person desires no contact. When checked, this visitor will be excluded from mailings in the Mail Manager and from phone lists in the PhoneTree export. |
| Needs Prayer | Check this box if person needs prayer. You can use the notes area to note the specifics about the prayer need. Click the ZOOM button to expand the notes into a larger window. |
| Schedule a Visit Now | Launches the Schedule Manager. Once launched, you may need to switch to Visit View Mode. |
| Prayer Notes | You can enter free form notes here. The Zoom button will open up a larger editor. |
| Appearance History | This grid lists all appearances recorded for this visitor. Click the EDIT button in the grid to to view and/or change comments. |
| Add | Click the ADD button to add an appearance for the current visitor. |
| Delete | Click the DELETE button to delete the currently selected appearance. |
| Edit | Click the EDIT button to edit the currently selected appearance (to change details or comments). |
| Exit | Click this to exit the Visitor Manager. |

Table 9-1 Visitor Manager Form Items

## What Happens When a Person is No Longer a “Visitor”?

There are two ways to remove a visitor. One is to delete the person in the Membership Manager. This will remove all traces of the person from your databases. The second option is to simply uncheck the “Person Is A Visitor” checkbox in the Membership Manager. If the person has appearance history in the Visitor Manager, you will be asked if you want to delete it.

## Automatic Appearance Tracking

When detailed attendance is tracked for a visitor in the Schedule Manager, the appearance history in the Visitor Manager is automatically updated.

## *Chapter 10 The Giving Manager*

One of the most useful features in ChurchWatch is the sophisticated Giving Manager for keeping track of contributions. A companion Tax Receipt Manager is also included for creating tax receipts and IRS reports at tax time.

### Setting Up

Before using the Giving Manager you must review some of the setups in the Setup Manager. As well, you will need to create your giving account names. Figure 10-1 shows the Giving page of the Setup Manager and Table 10-1 explains the fields on this page.


Figure 10-1 Setup Manager, Giving Page

| Field Name | Description |
|---|---|
| Charity Registration # | Charitable organizations such as churches need to be registered with the Government's tax department in most countries. Your tax department will assign a charity registration #. Enter it here for use on tax receipts and reports. |
| Last Receipt # Assigned | Tax receipting is covered in detail later in this chapter. This is the last tax receipt number that has been assigned. You can reset the number to zero by pressing the RESET TO ZERO button but this should only be done before any receipts are issued if at all. If receipts already exist, ChurchWatch will not allow this operation. |
| Default Giving Account | To speed up data entry, set a default giving account here. This account will always be auto selected by default when adding giving or pledge records. You will need to create giving accounts first - refer to the next section. To clear the default giving account click the delete button ("X") beside the account name. |
| CRA Website | Useful only for Canadian churches. CRA guidelines require Canadian charities to place the CRA website on all tax receipts. This field is provided in case the website changes. It is factory defaulted to the correct website address. |
| Include CRA Website on Tax Receipts | Check this box to include the CRA website on tax receipts. Churches outside of Canada should uncheck this box. |
| Auto Load Prior Giving Patterns (Master Enable) | In the Membership Manager, Person Level, Giving page, you may select auto-load. When this box is checked the Giving Manager will search for and automatically enter a person's last giving amount and account when you select the person or envelope number. This behavior can help speed up data entry for people who tithe or give the same amount regularly.<br><br>The Auto-Load master enable must also be turned on to enable this behavior. You can temporarily disable this feature by turning off the master enable without affecting the setup for each person.<br><br>Note that you can also quickly set or clear a person's auto-load attribute by selecting the person in the Giving Manager's data entry area and then by clicking the SET AUTO-LOAD or CLEAR AUTO-LOAD button. |
| Fiscal Year End | ChurchWatch includes several fiscal year end reports. Enter the fiscal year end here. Note that the year is unimportant and is not used. |
| Printed Name | This is the printed name that matches the digitized signature. It will appear under the signature on tax receipts and reports. Use of a digitized signature is optional but recommended to save time. |
| Digitized Signature | To reduce your work load at tax time, you may enter a digitized signature file. The digitized signature is used on tax receipts and tax reports. The signature file must be a BMP, JPG or GIF graphics file. Click the SET SIGNATURE FILE button to select the signature file. Click the CLEAR button to remove the signature file. Click the TEST button to view a sample tax receipt with your signature. We recommend testing your signature before printing any receipts.<br><br>***Tip:*** *Use a thick dark felt marker to create your signature. Then scan it into a .BMP, .GIF or .JPG file. In addition, eliminate as much white space as possible before importing into ChurchWatch.* |

Table 10-1 Giving Setups

## Currency Symbol

You can set the currency symbol used by ChurchWatch on the FORMATS page of the Setup Manager. The default symbol is “$”.

## Giving Accounts

You will need to plan and setup your giving accounts before entering giving or pledge records. Refer to Chapter 6 for information on creating and maintaining giving account names.

## How Offerings are Grouped

An “offering” is defined by ChurchWatch as any amount(s) given on one particular date. This is an important concept to understand for USA customers. For tax reporting purposes, offerings >= $250 must be substantiated. In the rare case where two or more offerings are given on the same day by one person, they will be treated as a single offering. If the total amount for the day is >= $250 it will appear on the Substantiation of Contributions Report.

## A Word or Two About Envelope Numbers

Envelope numbers are optional in ChurchWatch. If you intend to use them, they are entered in the Membership Manager at the person level on the GIVING page. You can enter offerings by envelope number or by name. Tax receipts are issued to single persons, not families or even envelope numbers (although spouse name can optionally be shown on the receipt also). The same envelope number can be assigned to more than one person in the same family. If you use the envelope number when entering the giving data, and if the envelope number is shared by more than one person in the family, the offering will always be credited to the main contact of the household. This is of no consequence, at least in Canada, since either the husband or wife can claim the receipt regardless of whose name appears on it. The exception to this would be if a child in the family (or any person who is not the husband or wife) shared the same envelope number. Again, the offering would be credited to the main contact of the house. You need to understand these concepts if you decide to use envelope numbers.

Although envelope numbers are always issued to persons, not families, you can still get ChurchWatch to issue receipts to couples and can print family-based labels for envelope boxes in the Mail Manager. The trick is to always make sure that offerings are credited to the main contact in the family. There are several ways to do this. You could assign the same envelope number to all people in the family, and then enter offerings by envelope number. In this case, offerings will always be credited to the main contact in the family. Alternatively you can assign the envelope number to the main contact only and still enter by envelope number. Or you can enter offerings by name. At tax time, you can produce receipts for a couple rather than for a single person (refer to the Tax Receipt Manager in the next chapter). Mailing labels that include the envelope number can be produced in the Mail Manager. If you choose family based labels, the label will be issued to the family and will include a single envelope number (the envelope number of the main contact is used).

***IMPORTANT:*** *If you enter offerings by name and two or more people in the family have been credited with offerings, the Tax Receipt Manager will produce multiple receipts for the family.*

## Batches

In ChurchWatch, giving records are always entered in sessions or “batches”. Before entering records you must create a batch. Each record entered from that point on will contain the current batch date as the date given. The batch date should be set to the date that the offerings were collected. To create a batch, click the NEW button under the Batch Control area in the lower left of the form. To edit an existing batch date click the EDIT button. The form in figure 10-2 will be displayed.

In this form you can set the batch date and optionally enter a designator name and a pre-calculated batch total. The Designator name is optional but is a handy way to quickly find important batches. The pre-calculated total is also optional but is a handy way to make sure that the data entry balances to the actual teller sheet or known collected totals.

## Locking a Batch

You can lock a batch to protect it from any further modifications. To do this, click the LOCK button in the Batch Information form or in the Giving Manager. A lock icon indicates that the batch is locked. To unlock a batch, click the UNLOCK button.

## The Giving Manager Form

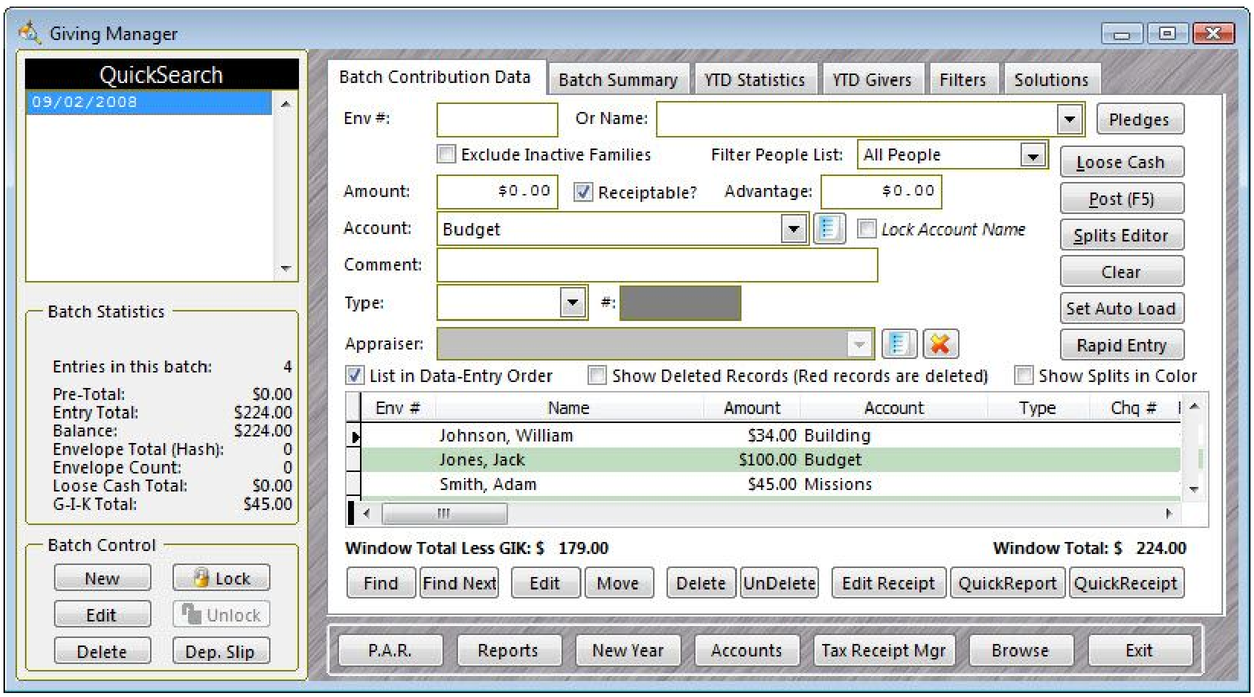



Figure 10-2 The Giving Manager

## Batch Statistics Area and "Envelope Hashing"

The Batch Statistics Area is used to display statistics about the batch. Most are self explanatory but some explanation is required for the concept of "Envelope Hashing". The hash total for any batch is the sum of all envelope numbers. In addition to the batch balance, the hash total is another way to verify your data entry. Calculate the total sum of all envelope numbers on your teller sheet for the batch, and then compare it to the hash total in ChurchWatch. If they match you can be reasonably confident of good data entry. Note that this concept only works if you work 100% with envelope numbers since ChurchWatch will auto-complete the envelope number when you enter by name and in this case the envelope number may not be present on your teller sheet.

## Batch Control Area

The area in the lower left of the form is called the Batch Control Area. There are buttons here to create a brand new batch, edit the properties of an existing batch, delete an entire batch and all offerings in it, lock and unlock and another button for printing deposit slips for your bank deposit.

| Form Item | Description |
|---|---|
| New | Click this button to create a new batch. |
| Lock | Click this button to lock the batch to protect it from any further modifications |
| Edit | Click this button to edit the name, date and pre-calculated total of the currently selected batch. |
| Unlock | Click this button to unlock a locked batch. |
| Delete | Click this button to delete a batch and all contribution data entered in this batch. |
| Dep. Slip | Click this button to print a deposit slip for the batch. |

Table 10-2 Batch Control Area Items

When you create a new batch or edit an existing batch, the Batch Editor is used (see figure 10-3). In this form you can set a free-form designator, the batch date, an optional pre-calculated total and a comment.

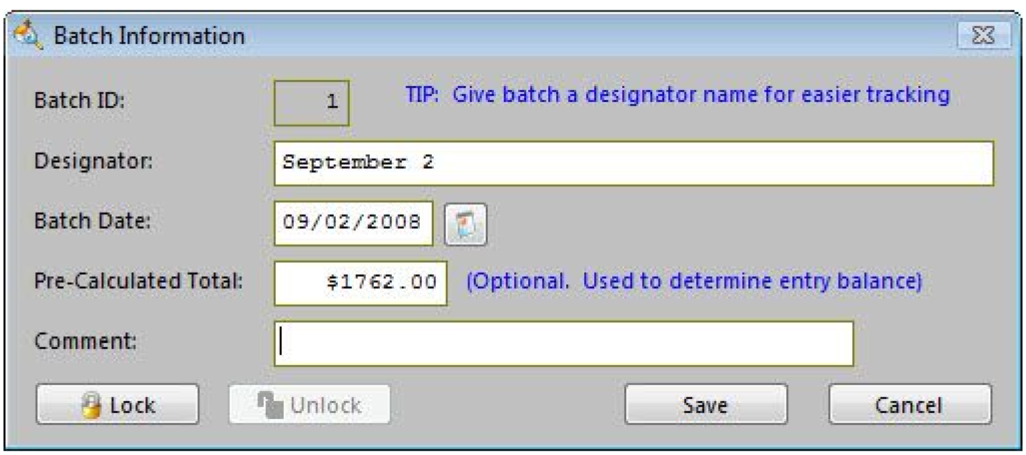


Figure 10-3 The Batch Editor Form

## Data Entry Area

The area at the top of the "Batch Contribution Data" page is used for posting new offerings or editing existing offerings. It has no other purpose. When the background color of this page grey, you will be posting new data. When the background color is green, it indicates that an existing record has been loaded for modification (this will be explained later). Table 10-3 examines each item in this box in detail.

| Form Item | Description |
|---|---|
| Env # | If you are using envelope numbers you can start data entry by entering the envelope number here. The person name will automatically be filled in. Check it to make sure you have the correct envelope number. |
| Or Name | You can also directly enter a name instead of an envelope number in this box. If the person has an envelope number assigned, the envelope number will be automatically filled in. |
| Exclude Inactive Families | The list of names can be quite long (its all people in your database). You can reduce the list by excluding inactive families. Inactive families are marked so in the Membership Manager. Note that if you edit an existing record, ChurchWatch may automatically uncheck this box so that the person that gave the offering appears in the list. |
| Filter People List | The list of names can be quite long (its all people in your database). You can reduce the list by selecting an item from this filter list. This will make finding a person or business of interest easier. Note that if you edit an existing record, ChurchWatch may automatically remove the filter and reset back to "all people" so that the person that gave the offering appears in the list. |
| Amount | Enter the amount of the offering here. If it is a split offering, enter the total amount. There is more information on split offerings later in this chapter. |
| Receiptable | The receiptable status of the account can be overridden for this ONE RECORD ONLY by checking or unchecking this box. It is automatically filled in when the account is selected. The receiptable status is normally pulled from the account's default. |
| Advantage | If there is an advantage associated with this offering, enter it here. More information on advantages and eligible amounts comes later in this chapter. |
| Account | In this field, enter the name of the giving account the funds are to be directed to. You can click the list button beside the field to launch the Account Names Editor. |
| Lock Account Name | Sometimes you will have several entries against the same account. Check this box to lock the account name so that it is not cleared when posting and so that the default account (set in the Setup Manager) is not loaded. |
| Comment | A comment can be entered in this field. |
| Type | Entry of the offering type is optional. Set the type of transaction here - None (not used), Check, Cash, Credit Card, Gift-In-Kind etc. |
| Check Number | If a check was given you can record the check number in this field. If you plan to print deposit slips, you should enter the check number here. |
| Appraiser | If the offering is a gift-in-kind you can select the name of the appraiser here. The list button beside the list will open the Appraiser Editor so you can create or modify the appraiser name and address and the "X" button will clear the appraiser name. In Canada, if an appraiser is used, you must choose them here. |
| BUTTONS | |
| Pledges | First choose a person in the "or name" list box, then click this button to view this person's pledges. |
| Loose Cash | For loose cash entries, click this button first to have the name and envelope numbers filled in. Envelope #0 is reserved for loose cash. |
| Post | Click this button to POST (save) your data entry. All fields will be checked before posting and you will be warned of any errors. As a shortcut, you can just press the F5 function key on your keyboard to post data. A word of caution, though. F5 works even when the Giving Manager is open but is not being viewed. |
| Splits Editor | This button is used for split offerings. Split offerings occur when a single offering is to be split up and directed to several accounts. Click this button to open the Splits Editor. The Splits Editor will be discussed in a following section |

| Form Item | Description |
|---|---|
| Clear | Click this button to clear all data entry fields. |
| Set Auto-Load | This button is a convenient way to change the auto-load attribute for the person you have selected in the name or envelope number fields. Refer to table 10-1 for a description of the auto-load feature. If auto-load is already specified for a person, clicking this button will clear the auto-load attribute. In other words, this button toggles the state of the auto-load attribute for the selected person. |
| Rapid Entry | Click this button to open the Rapid Entry Editor (described later in this chapter). |

Table 10-3 Data Entry Area Items

## How to Handle Donations of Goods or “Gifts-In-Kind”

Gifts-In-Kind must be entered as a lone offering (they cannot be part of a split offering). To enter a split offering, select the person or envelope number in the Data Entry Area. Enter the value of the gift. Enter the account you want to credit the gift to. Set the type to “G-I-K”. In the comment field, enter a description of the gift (what is it). If the gift was appraised for value, select the appraiser’s name. If the appraiser does not yet exist in the database, you will need to create one by clicking the small list button beside the appraiser field. Finally, click the POST button. When tax receipts are created and printed, each gift will be placed on its own receipt. Gift-In-Kind tax receipts are printed at the end of the printing, after all “normal” tax receipts are printed.

## Split Offering Editor

The Splits Editor allows you to quickly split up an offering into several accounts. All Giving reports then give you the option of showing the split details or just showing the total of the offering. Begin by entering an envelope number or a name and the total offering, then click the SPLITS EDITOR button. The following form will be displayed.

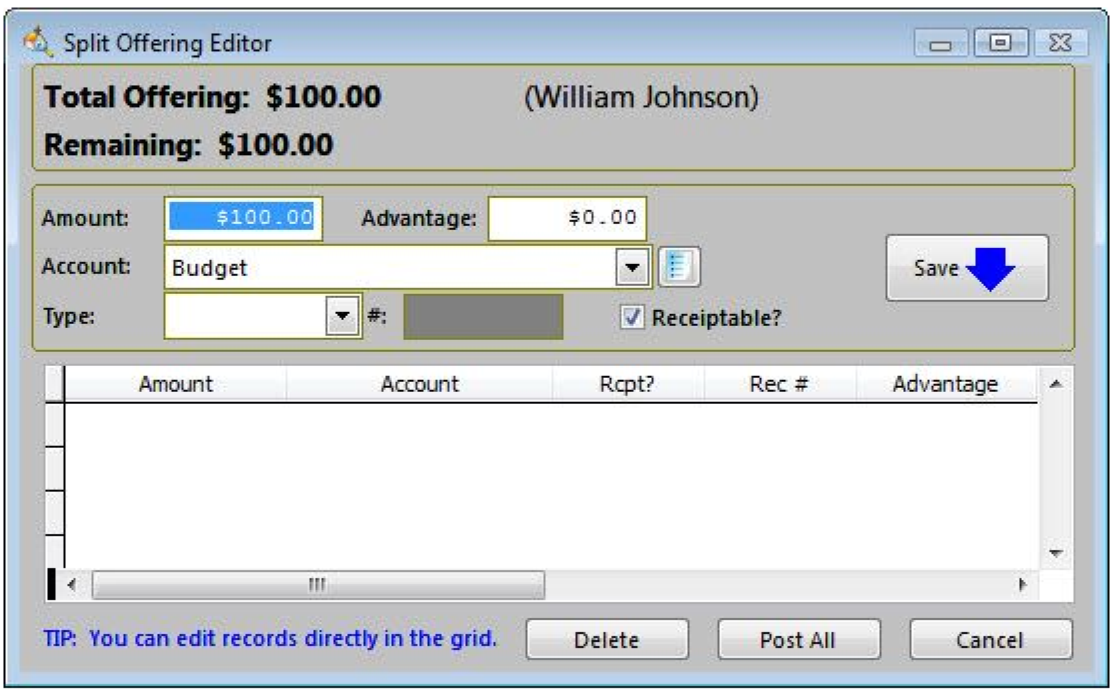



Figure 10-4 The Splits Editor

Enter the amount and account as a minimum, then click the SAVE button. Be sure to double check the receiptable status of the offering. In addition you can optionally enter the offering type and the check number if it's a check. The bottom window shows all components of the split. Note that you can modify the information in this window if a change is needed. As you enter the splits, the total offering will be reduced until it is zero (shown in the "remaining" field near the top of the form). Once the remaining offering is zero, you have balanced the offering. The DELETE button deletes the selected split record. The POST ALL button posts all your changes and entries. Be sure to click the POST ALL button to save your entries.

Note that Gift-In-Kind offerings should not be entered in the Splits Editor. Enter these as separate offerings.

## Viewing a Person's Address

Hover your mouse over the name or envelope number fields to view the address of the currently selected person. This can help to verify the person selected when you have several people with the same name.

## Giving Manager Form Pages

Table 10-4 explains the form items and buttons on each of the Giving Manager pages for those items that have not already been discussed.

| Field Name | Description |
|---|---|
| PAGE 1 | |
| List In Data Entry Order | You can change the sort order of the table grid by clicking on a column header. However, for giving batches this is normally not convenient for comparing data entries to a teller sheet. Check this box to list in data entry order. |
| Show Deleted Records | Check this box to show deleted records in the table grid. Delete records are shown in red. This is used primarily to undelete records. Note that once the data is packed on the Maintenance page of the Setup Manager, the deleted records are physically removed and cannot be recalled. |
| Show Splits in Color | Check this box to better see the groupings of split offering data. |
| Table Grid | Giving records are shown in this table. The records shown are controlled by the current filter which is by default the current batch date. |
| Find | Click this button to find a specific record. An important thing to note is that only records within the current filter (those shown in the table grid) will be searched. Only the first occurrence matching the search conditions is found |
| Find Next | Click this button to repeat the last find and find the next occurrence. |
| Edit | Click this button to edit the selected record in the table grid. The Data Entry area will turn green when editing an existing record. If you change you mind about editing the record, click the CLEAR button. You can also double click a record to edit it. |
| Move | Click this button to move the currently selected giving record to another batch. |
| Delete | Click this button to delete the currently selected giving record. |
| Undelete | Select a red deleted record and click this button to undelete it. |
| Edit Receipt | Click this button to launch the Receipt Editor. Refer to information in the next chapter. |
| QuickReport | Click this to get a quick report or mailing labels of all giving records shown in the table grid. |
| QuickReceipt | Click this button to create an instant receipt for the current giving record. This is very handy for non-profit organizations. Only the one single offering will be included on the receipt. The receipt will be displayed on screen. Click the printer icon button on the Report Toolbar to send the receipt to a printer. |
| PAGE 2 | |
| Table Grid | Shows a distribution summary for the current batch. Amounts are shown with and without consideration for Gift-In-Kind (GIK) donations. |
| PAGE 3 | |

| Field Name | Description |
|---|---|
| Table Grid | Shows year-to-date statistics for each defined batch. Red records indicate non-zero balances. This page is a handy way to quickly see if any batch is not balanced and we recommend you do this before creating tax receipts at year end. |
| PAGE 4 | |
| Table Grid | Shows a list of all givers in descending order of giving totals. You can click the column headers to change the sort order. |
| PAGE 5 | |
| Filters | This page contains a list of handy filters you can apply to the data to assist in finding and working with your giving data. Caution should be exercised when entering data with a filter in effect. Remember that new postings are always posted to the current batch. Depending on the current filter in effort, newly entered data may not appear in the table grid on page 1 and may therefore seem to “disappear” after entry. Return the filter to “Batch Date Filter (Normal)” when finished working with filters.<br><br>More sophisticated custom filters can be created by clicking “Advanced Filtering”. Refer to chapter 29. |
| PAGE 6 | |
| Move Deceased Person’s Offerings... | Click this button to move all of the offerings credited to a now deceased person to another person (such as the spouse). |
| Move All Offerings From One Person to Another | Click this button to move all offerings from one person to another. This button is handy when you want to print a tax receipt for a family but then find out that you have offerings in the database that are credited to several people in the family. This situation will produce multiple tax receipts. If you desire only one receipt, move all of the offerings to the main contact in the family. THIS MUST BE DONE BEFORE TAX RECEIPT SERIAL NUMBERS ARE CREATED! |
| Delete All Receipt Serial Numbers | If you make a mistake when creating the tax receipts at year end, you can click this button to delete all tax receipt serial numbers, and then try again. However, if there are multiple receipt dates in the database, ChurchWatch will not allow you to use this function since receipts that have already been issued (and assumed delivered) would also be deleted. |

Table 10-4 Giving Manager Page Items

## Form Buttons

Table 10-5 explains the form buttons.

| Button | Description |
|---|---|
| P.A.R. | P.A.R. stands for Pre-Authorized Remittance. Click this button to import a PAR file. This feature is intended mainly for United churches but the file format is somewhat flexible and can be adopted and used by most churches. Refer to the section on P.A.R. later in this chapter. It is also a handy way to import bulk giving data from a file. |
| Reports | Click this button to open the Report Manager, Giving reports. |
| New Year | Click this button to start a new giving year. This will allow you to archive all Giving, Household and People data. This will also delete all giving records in the Giving table to prepare for the new year's data entry. Refer to the section titled Preparing for a New Year - Giving Archive. |
| Accounts | Click this button to open the Account Names Editor to edit or define new accounts. |
| Tax Receipt Mgr | Click this to use the Tax Receipt Manager for creating tax receipts or Substantiation of Contribution reports. Refer to the Tax Receipt Manager description in the next chapter. |
| Browse | Click this to view Giving records in a spreadsheet format. The records shown depend on the current filter (by default the filter is the current batch date). |
| Exit | Click this to exit the Giving Manager. |

Table 10-5 Giving Manager Buttons

## Adding (POSTing) New Records

To add giving records, begin by creating a new batch date (or by selecting an existing batch date from the QuickSearch list). Next enter data in the Data Entry Area at the top of the form on page 1. When satisfied with the entry click POST to post the data. Split offerings can also be entered (refer to the previous section on splitting offerings). When you POST or SPLIT an entry, a record or set of records will be added to the table grid on the tab labeled "Batch Contribution Data" (assuming the current filter allows it).

## Editing Existing Records

To edit a giving record, double click on it in the table grid. You can also select the record and click the EDIT button. In either case, the record's data will be loaded into the data entry area and page 1 will turn green. Modify the data and then click the POST button. To cancel the edit just click the CLEAR button.

## Faster Data Entry

When you begin adding your first giving records you may find that the process is a bit awkward and slow. The trick to making the data entry go faster is to avoid using the mouse at all times. Practice these steps and you will soon become quite proficient at data entry. We'll assume that the cursor is already located in the envelope number or name field:

| | |
|---|---|
| Step 1 | Enter an envelope number or name. Press the TAB key. If you entered an envelope number you will need to confirm the name and then press TAB again. If there is no envelope number press the TAB key to move to the name field. When in the name field, there is no need to pull down the list. You can enter the first few letters of the last name, then use the up and down arrow keys to browse further to the correct name. |
| Step 2 | Enter the amount to post. Press the TAB key. |
| Step 3 | The cursor is now on the receiptable field. If you wish to change it press the SPACE bar. Then press the TAB key. |
| Step 4 | You are now positioned in the Advantage field. Enter the advantage, if any, and press the TAB key. |
| Step 5 | You are now positioned in the account field. If the account selected is correct, just press the TAB key. Otherwise type the first few letters of the account name until you find the account you need. Press the TAB key. |
| Step 6 | If you wish to enter a comment do it now. Otherwise press the TAB key again. |
| Step 7 | To enter a transaction press the space bar. This will open the list, use the arrow keys to select and item. Press the TAB key to move on. |
| Step 8 | If you selected "check" you are now in the check number field. Enter the check number and press the TAB key. If you did not select "check" move to step 10. |
| Step 9 | Select an appraiser by typing the first few characters of the name. Press the TAB key to move on. |
| Step 10 | Press the ENTER key to "press" the POST button or just press the F5 function key on your keyboard (a shortcut key). |

## Fastest Data Entry – The Rapid Entry Editor

The Rapid Entry Editor is new to Version 5. It can be used to rapidly enter offering data using a numeric keypad. The Rapid Entry Editor uses account codes instead of account names. You will need to setup the rapid entry codes in the Account Names Editor (refer to chapter 6). Click the RAPID ENTRY button to access it. The following form will be displayed.

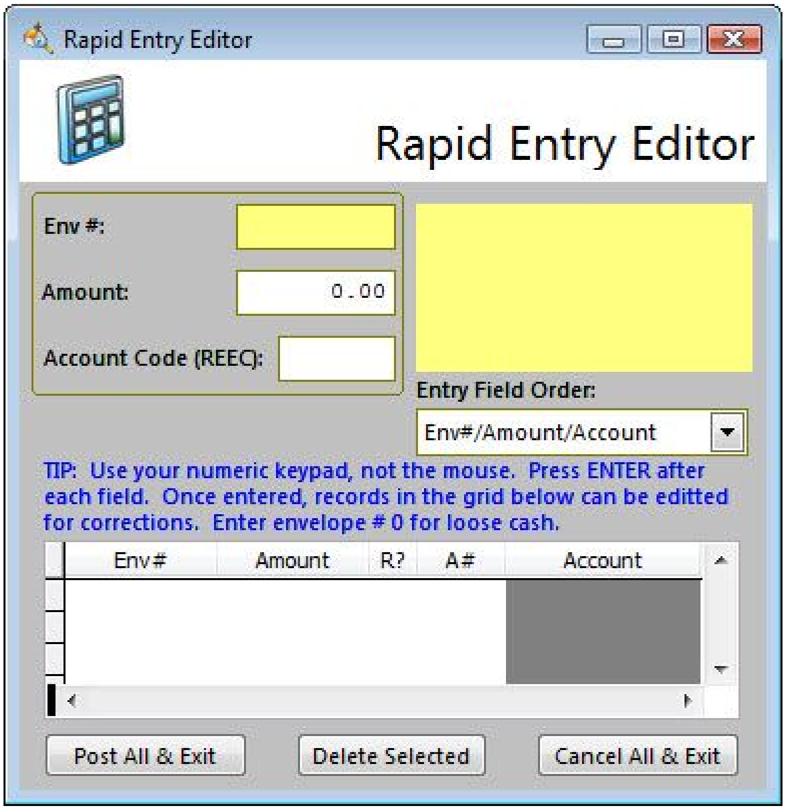



Figure 10-5 The Rapid Entry Editor

Using the numeric keypad only, enter an envelope number, then press the ENTER key. Next enter the amount of the offering and press the ENTER key. Finally enter the rapid entry code for the account and press the ENTER key. The offering will be moved to the bottom grid along with some additional automatic information such as receiptable status and the account name.

For your convenience and preference, you can adjust the order of the entry fields using the Field Entry Order list box.

When the offering data is in the lower grid, it has not been saved. Click the POST ALL & EXIT button to save all the data. The DELETE SELECTED button will delete the selected offering. The CANCEL ALL & EXIT button ignores all entries and closes the form.

Note that the Rapid Entry Editor is designed for speed of entry and therefore does not allow for offering type to be entered nor does it support split offerings or advantages etc. To do more complex offering entries, continue to use the Data Entry area in the Giving Manager.

## Advantages and Eligible Amounts

While more important for Canadian churches, this feature can be used in other countries. An “Advantage” is the amount of the offering that is not receiptable. For example, suppose your church holds a charity golf tournament and the amount to golf is $100. If a round of golf costs $30 normally, this is the “Advantage” and it is not tax receiptable. The “Eligible” amount is the difference between the total offering and the Advantage and is considered the tax receiptable amount. In this example, the Eligible amount that would appear on a tax receipt is $70.

This concept is quite important in Canada where the CRA requires you to record the Advantage and receipt only the Eligible amount. ChurchWatch will do all this for you automatically provided that you enter the Advantage when the offering is entered in the Giving Manager.

## What To Do When a Person Dies

When a person dies, you can either leave them in the database system and issue a receipt to the estate at year end, or you can delete the person. However, ChurchWatch does not allow you to delete any person who has offerings stored in the Giving Manager or pledges stored in the Pledge Manager. If you wish to delete a deceased person that has offerings and/or pledges, use this method:

1) Move all offerings from this person to his or her spouse. This can be done with one click on the “Solutions” page in the Giving Manager.

2) Delete any pledges for this person in the Pledge Manager

3) Delete the person in the Membership Manager

4) If this person was the main contact in the household, change the spouse to be the new main contact. This is done in the Membership Manager.

If you intend to keep the person in the database, mark them as deceased in the Membership Manager on the “Church” page at the person level. The “deceased” checkbox can be found under the title “Important Church Dates”.

## Preparing for a New Year - Giving Archive

ChurchWatch works on a tax year of January 1 to December 31. After December 31 you will not be permitted to enter new records for the new year since Giving years cannot be mixed (you can still enter records for the past year). Once your tax obligations are complete and you are ready to start a new year, the giving data needs to be archived. Archiving also gives you an opportunity to delete all temporary household and people records and removes all giving data so that you are ready for the new year. Be sure to do a backup before archiving the giving data.

Note that the archived giving data is moved to the "Archive" folder under the main ChurchWatch Data folder. You can always go back and view or edit past giving years by selecting the year in the Data Context Toolbar at the top of the screen.

The process is simple and is described in the following paragraphs.

***Note:*** *Archived data is stored in the ARCHIVE folder under the ChurchWatch Data folder.*

***Important:*** *Be sure to do a backup first since the Archive process affects many ChurchWatch tables.*

| | |
|---|---|
| Step 1 | Do a backup first. |
| Step 2 | Click the NEW YEAR button in the Giving Manager. The form shown in figure 10-6 will be displayed. |
| Step 3 | Recall from chapter 8 that the Membership Manager has a type field that allows you to indicate if a family is temporarily entered for giving purposes only (see figure 10-7). Check the "Delete Temporaries (Visitors)?" checkbox on the Archive form if you wish to purge all temporary families from the Membership Manager. You can also wait until another year if you so wish. |
| Step 4 | You can call up the Envelope Shift form AFTER the archive is complete by checking the checkbox in this form. This will allow you to shift your envelope numbers from the "Next Year" field to the "This Year" field and so on. |
| Step 5 | Finally, click the ARCHIVE button to complete the archive. You are now ready to being entering the current year's giving and pledge data. |


Figure 10-6 Archiving Giving Data


Figure 10-7  Setting a Household as a Temporary Giver in the Membership Manager

## Using Data From Previous Years

To view and edit data from archived giving years, simply use the year pull-down box on the ChurchWatch Data Context toolbar.  Archived data includes giving, pledges, accounts, batches, membership and last receipt number.

## P.A.R. Import (Pre-Authorized Remittance)

P.A.R. stands for Pre-Authorized Remittance.  The PAR import can also be used for other types of giving data imports of your design.  Click the PAR button in the Giving Manager to launch the PAR Import form.  This feature is intended mainly for United churches but the file format is somewhat flexible and can be adopted and used by most churches.  When you click the PAR button, the form shown in figure 10-8 will be displayed.

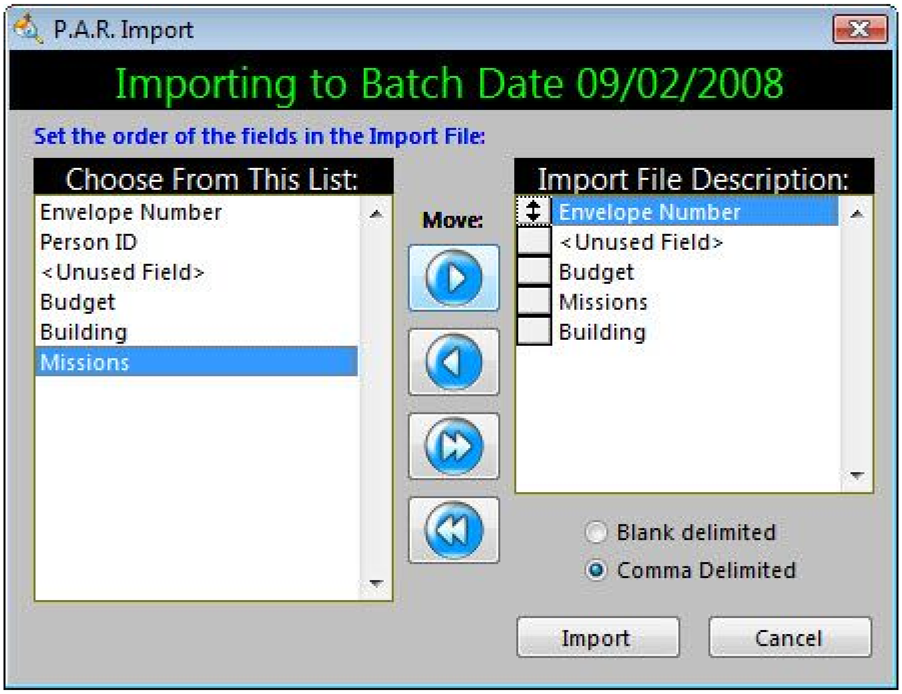



Figure 10-8  PAR Import Form

The PAR Import Form is used to define and perform the PAR import.  Once you have described your file format, ChurchWatch will remember it so that it will not have to be described again.  PAR files must be organized into records using either a person id or envelope number to define the person to credit the offering(s) to.  Following the person id or envelope number, a list of numbers representing offerings to each account must be given.  Data in the PAR import file must be comma or blank delimited ASCII text.

## A PAR Example

Examine the example form in figure 10-8. Using the list on the left and the arrow buttons, we have created the list on the right that uses the following fields in this exact order:

ENVELOPE NUMBER, unused field, BUDGET,MISSIONS,BUILDING

Your PAR import file should be a text file and in our example is comma-delimited since we have checked that option. Comma delimited means that there is a comma between each field in each record in the text data file:

Suppose we have an example data file that has the following text in it:

10, 0.0, 300.00, 20.00, 50.00
12, 0,0, 400.00, 0.00, 0.00

So in this example, envelope # 10 has given $300 to Budget, $20 to Missions and $50 to the Building Fund. Envelope # 12 has given $400 to Budget and nothing to any other fund.

## Describing the PAR Import File

Here's how we setup the example. To describe the file format, select fields from the left-most list in the PAR Import Form and move them to the right-most list. The right-most list describes the file format (ie the order of the fields in the records in the file). You can skip fields in the import file by using the <Unused Field> marker in the PAR Import Form. You can reorder fields by clicking and dragging the button beside each field name in the right hand list. Make sure that the order and number of fields described in the right hand list EXACTLY matches your PAR import file format.

## PAR Rules

Some rules regarding PAR imports:

1. All data in the file must be numeric.
2. The data file must be ASCII delimited text.
3. Do not use a header record in the file.
4. Use commas or blanks to separate each field in each record and make sure you select the proper delimiter in the PAR Import form.
5. All data goes to the current batch date (note the header at the top of the PAR Import Form).
6. The description of the PAR import file in the right hand list must exactly match the field order and number of fields in your PAR import file.

## Proceeding with the PAR Import

Once you have described the PAR file field order and have selected the proper delimiter character, click the IMPORT button in the PAR Import form to perform the import.  You will be prompted for a file.  Locate and select your import file name.  The data will be imported into a temporary table and displayed as shown in figure 10-9.

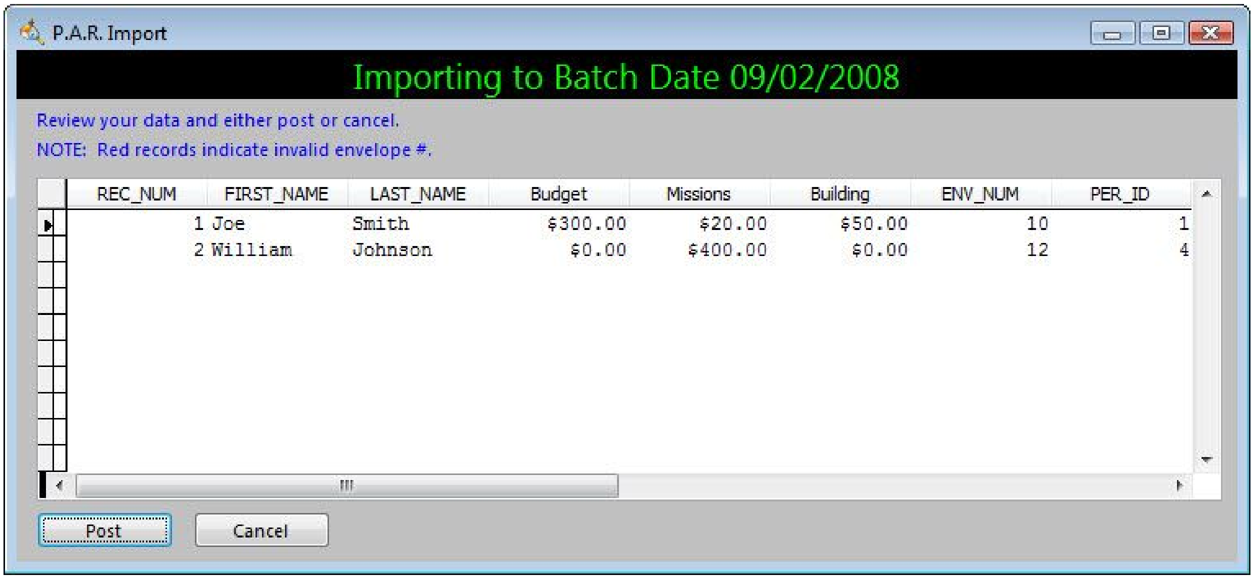



Figure 10-9  Completing the PAR Import

Review the data and if satisfied click the POST button to commit and save the data.  Otherwise click the CANCEL button.  Note that records that have offerings to more than one fund will be created as split offering data automatically.

# *Chapter 11 The Tax Receipt Manager and Tax Receipt Editor*

## The Tax Receipt Manager

The Tax Receipt Manager is an excellent tool for streamlining end of the year tax preparations. There are two main uses:

1. **Tax Receipts**. Tax receipts are used mainly in Canada for the reporting of charitable donations to the Canada Customs and Revenue Agency but can be used in other countries as well.

2. **Substantiation of Contributions** (hereafter referred to as the S.C. Report). This report is intended mainly for the USA to substantiate contributions of $250.00 or more to the IRS.

In addition, the Tax Receipt Manager is capable of printing mailing labels for mailing the tax receipts or S.C. reports.

Two other reports are available:

1. **The Giving Details report**. This report contains all offerings made by each person. You may want to mail this out along with the receipts or S.C. report.

2. **The Tax Year Audit report**. This report is useful after printing tax receipts. It contains a list of all receipt numbers, the amount on the receipt and who the receipt was issued to.

There are also many options available to you such as:

- Set report destination (screen or printer)
- Set filters
- Set receipt and report options

***Tip:*** *In addition to printing mailing labels, the Tax Receipts and S.C. report are designed for #10 windowed envelopes when folded twice. A folding machine and #10 windowed envelopes can greatly reduce your work load at year end.*

**The Tax Receipt Manager Form**

The Tax Receipt Manager is accessed only from the Giving Manager using the Tax Receipt Mgr button near the bottom of the form. Click this button to launch the Tax Receipt Manager.

**Actions Page**

When the Tax Receipt Manager form opens, the 'Actions' page is always displayed first. On this page you will set the action items you wish to perform.

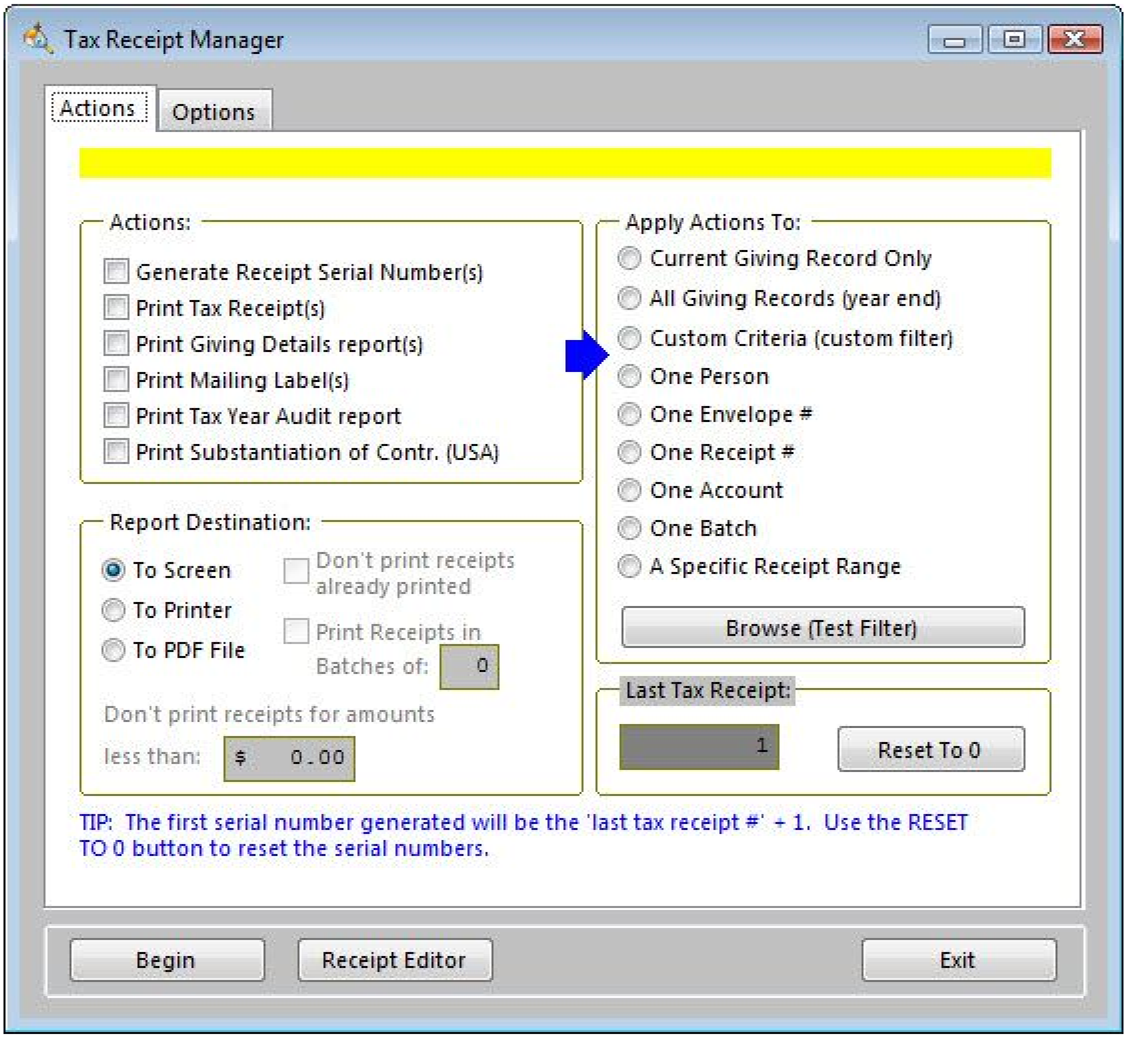


Figure 11-1 The Tax Receipt Manager Form, 'Actions' Page

Table 11-1 describes the contents of this page:

| Form Item | Description |
|---|---|
| Generate Receipt Serial Number(s) | Check this box to generate the serial numbers for receipts. A tax receipt does not exist until it has a serial number so normally this box is left checked. If all records already have a tax receipt number, leaving this box checked will do no harm but no new receipt numbers will be generated. |
| Print Tax Receipt(s) | Check this box to print the tax receipt(s) to screen or printer or PDF file. |
| Print Giving Details Report(s) | Check this box to produce a giving details report for each person. |
| Print Mailing Label(s) | Check this box if you need mailing labels. Be sure to pick label stock on the Options page. |
| Print Tax Year Audit Report | Check this box to print an audit report. This is recommended and you should keep this report on file. |
| Print Substantiation of Cont. (USA) | Check this box to print the S.C. report. |
| "Apply Actions To" Data Filter Options | You have many convenient options for creating a filter. Tax Receipt Manager operations will apply to the filtered records only - very handy. The available filters are:<br><br>**Current Giving Record Only** - apply actions to the current record only. Refer to the note at the top of the Tax Receipt Manager form to verify the current record (the field in yellow).<br><br>**All Giving Records** - this would be used at year-end in a church to apply actions to all records<br><br>**Custom Criteria** - choose this to create your own custom data filter<br><br>**One Person** - click this to choose one person by name<br><br>**One Envelope #** - click this to choose one person by envelope number<br><br>**One Receipt #** - click this to choose one receipt number. This can be quite useful to reprint or view a single receipt that has already been issued<br><br>**One Account** - click this to choose all records for a single giving account. This filter can be useful when receipting for a single special event<br><br>**One Batch** - click this to choose all records in one batch date<br><br>**Specific Receipt Range** - click this to choose a specific receipt range |
| BROWSE button | Use the BROWSE (TEST FILTER) button to check the results of your data filter and to see what giving records will be included in the tax receipt or report generation. |
| Report Destination | Reports can be sent to the screen, printer or PDF file. PDF files are suitable for emailing. PDF files are considered the same way as a printer in that you will get an "already printed" warning if you attempt to print or send the tax receipts to a PDF file a second time. |
| Don't print receipts already printed | If you are printing hard copy receipts it is not advisable to issue duplicates. Check this box to prevent ChurchWatch from printing tax receipts that have already been printed. |
| Print Receipts in Batches of | To reduce the load on your printer, you can print receipts in smaller batches. Check this box to do so, then enter the number of receipts you want in each batch of receipts that are sent to the printer. |

| Form Item | Description |
|---|---|
| Don't print receipts for amounts less than | Fill this field in to limit generated receipts to amounts greater than this.  For example you may not want to issue tax receipts for amounts less than $5.  This refers to the receipt total, not individual offerings.  So for example, if an individual gave seven $1 contributions throughout the year, the total would exceed the limit and he/she would receive a receipt for $7. |
| Last Tax Receipt | This field shows the last tax receipt number that was generated.  The next receipt generated will carry a serial number of one (1) higher.  Use the RESET TO ZERO button to reset the serial numbers if you are sure no other serial numbers exist in the database, however, this practice is not recommended.<br><br>***Note:*** *If there are tax receipt numbers already generated for the current giving year, ChurchWatch will not allow you to reset the last receipt number.* |

Table 11-1 Actions Page Items

**Options Page**

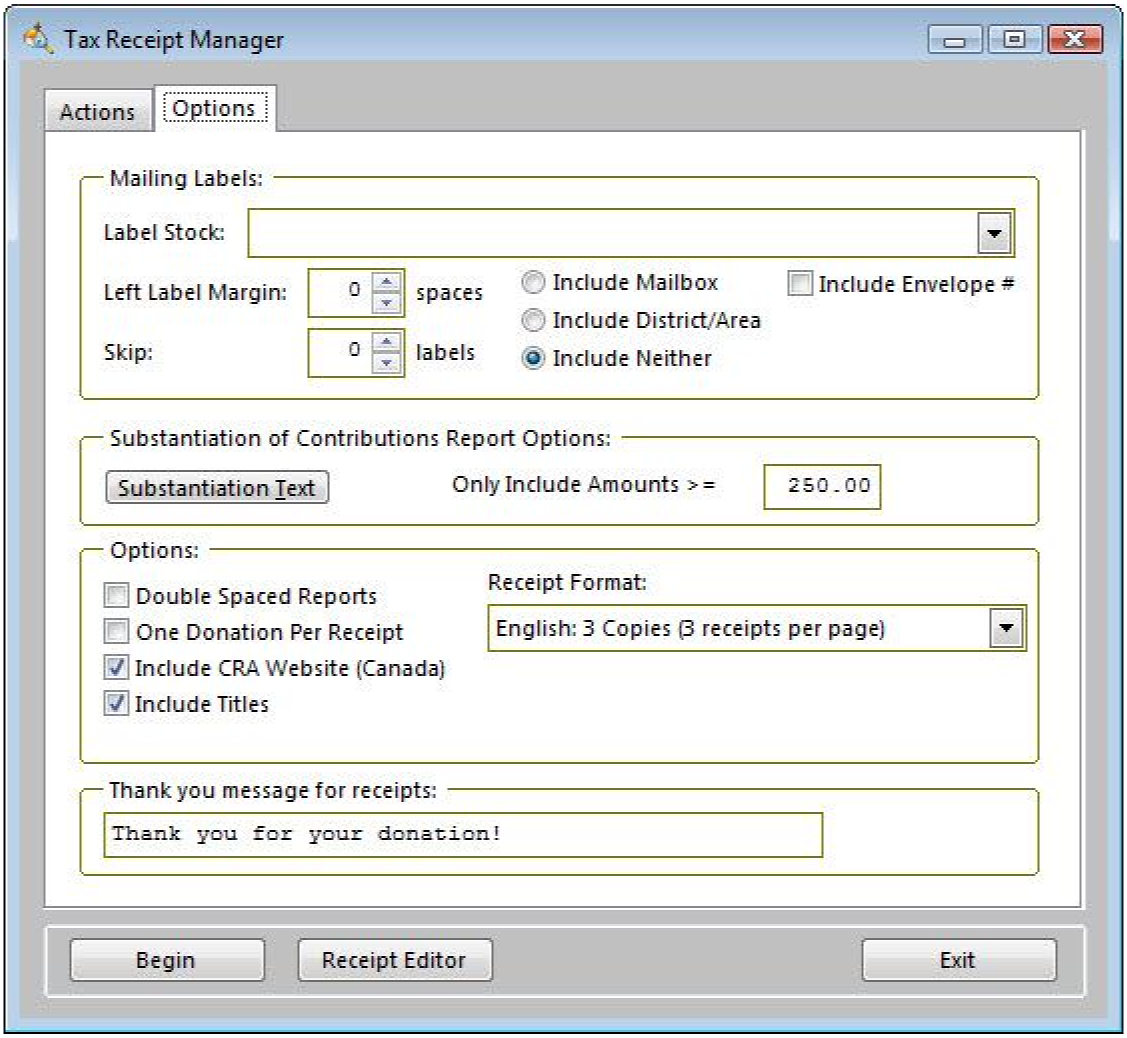



Figure 11-2 The Tax Receipt Manager Form, 'Options' Page

| Form Item | Description |
|---|---|
| Label Stock | If you are printing mailing labels you must choose a label stock. Many different label stocks are supported. If yours is not listed choose one of similar size. If you are printing to printer ChurchWatch will prompt you to load the printer with the label stock. |
| Left Label Margin | If you would like more margin on the left side of the labels enter a number of spaces in this field. |
| Skip x Labels | To finish using label sheets that are partially used, enter the number of labels to skip in this field. Labels are skipped at the start of the job. |
| Include Mailbox/District/Neither | Select an option here to include either the church mailbox number or the district/area on each label. |
| Include Envelope # | If desired, you can include the person's envelope number on each mailing label. Check this box to do so. The 'This Year' envelope number will be used. |

| Form Item | Description |
|---|---|
| Substantiation Text | Click this button to edit the text that appears on the Substantiation of Contributions Report. |
| Only Include Amounts >= | The Substantiation of Contributions report includes any amount greater or equal to this value. The default is $250.00. |
| Double Spaced Reports | Check this box for double spaced reports. |
| One Donation Per Receipt | Includes only one donation amount per receipt. This is not particularly useful in a church but is intended mainly for charities that must give a receipt for every transaction. |
| Include CRA Website on Receipts (Canada) | This box is intended for Canadian churches only. Canadian churches are required to include the CRA website on all tax receipts. If your church is located outside Canada, uncheck this box. |
| Receipt Format | There are many receipt formats available including English, French, Bilingual and receipts that include donation details. Select the receipt format most suitable for your use.<br><br>Churches in the USA may be interested in the receipts that include the Substantiation text. |
| Thank you message for receipts | Use this field to change the thank you message printed on the tax receipts. If using French language receipts, be sure to enter this message in French. |

Table 11-2 Option Page Items

**Tax Receipt Manager Form Buttons**

Table 11-3 lists and explains the Tax Receipt Manager form buttons:

| Button | Description |
|---|---|
| Begin | Click this button to perform the actions you have selected. |
| Receipt Editor | Click this button to view the Tax Receipt Editor. Refer to the “Tax Receipt Editor” section below for more information. |
| Exit | Click this button to exit the Tax Receipt Manager. |

Table 11-3 Tax Receipt Manager Buttons

**Including Spouse Name on Receipt**

The selection to include spouse name on the tax receipt is done in the Membership Manager per-family.

***IMPORTANT:*** *When checked, if both persons have made donations, the receipt amounts will NOT be combined into a single receipt. Receipts in ChurchWatch are always attributed to the individual that made the contribution. In this case you will get two receipts both addressed to the couple. If this behavior is not desired, make sure to always credit contributions to the main contact of the household. Note that there are also move donation buttons in the Giving Manager, Solutions page.*

**Canadian Tax Receipt Generation**

Tax receipts are intended mainly for Canadian churches but may be suitable in other countries as well. ChurchWatch will attempt to place all contributions made by a single individual onto a single tax receipt, depending of course on the data filter you have selected. Once a receipt has been generated, ChurchWatch will not automatically add any further amounts to the receipt since it is assumed the receipt has been issued. If it is absolutely necessary that a tax receipt be modified, you can use the Tax Receipt Editor to modify the receipt or delete the receipt, then use the Tax Receipt Manager to recreate a new one.

Here are some guidelines and tips for creating tax receipts:

1. Before proceeding, make sure your giving data is “clean”. Double check all batch totals using the “Batch Summary #2" report in the Report Manager or the YTD statistics page in the Giving Manager.
2. Do a backup! We cannot stress this point enough. This will allow you to restore the starting state of your database tables if necessary and will allow you to proceed with confidence and re-start if need be.
3. Use a digitized signature if possible so that you won’t have to hand sign all the receipts.
4. Remember to set your charity registration number on the GIVING page of the SETUP form.
5. Decide if you will be generating a single tax receipt or all tax receipts for year end and set the data filter accordingly. It’s a common mistake to leave the data filter set to “Current Record Only” at year end.
6. Check the “Generate Receipt Numbers” and the “Print Tax Receipts” checkboxes in the Tax Receipt Manager. Make sure you select the screen as your destination so you can review the receipt(s) before printing.
7. If desired, you can change the thank you message printed on the receipt.
8. Use a paper folding machine and #10 windowed envelopes to further reduce your workload at year end.
9. If your church is located in Canada, remember to include the CRA website text.

### Donations and Tax Receipts – Important Information

Tax receipts are issued to single persons, not families or even envelope numbers. The same envelope number can be assigned to more than one person in the same family. If you use the envelope number when entering the giving data, and if the envelope number is shared by more than one person in the family, the offering will always be credited to the main contact person. This is of no consequence, at least in Canada, since either the husband or wife can claim the receipt regardless of whose name appears on it. The exception to this would be if a child in the family (or any person who is not the husband or wife) shared the same envelope number. Again, the offering would be credited to the main contact person in the household. You need to understand these concepts when assigning envelope numbers.

***Very Important!*** *Only offerings marked receiptable are included on tax receipts. When creating giving accounts, make sure the default receiptable status is set correctly.*

### USA Substantiation of Contributions Report

The Substantiation of Contributions Report is intended mainly for USA churches but may be suitable in other countries as well. To make this report as flexible as possible you can change the limiting amount which is defaulted to $250 for USA churches. You may want to double check the amount entered on the Options page before generating the report.

The purpose of the report is to satisfy the IRS requirement that all contributions over $250 be substantiated. The definition of an offering or contribution was given earlier in this chapter but we will repeat it here:

An “offering” is defined by ChurchWatch as any amount(s) given on one particular date. This is an important concept to understand for USA customers. For tax reporting purposes, offerings >= $250 must be substantiated. In the rare case where two or more offerings are given on the same day by one person, they will be treated as a single offering. If the total amount for the day is >= $250 it will appear on the Substantiation of Contributions Report.

***Very Important!*** *Only offerings marked receiptable are included on the Substantiation of Contributions report. When creating giving accounts, make sure the default receiptable status is set correctly.*

### Using Data From Previous Years

You can work on receipt data from previous archived giving years simply by selecting the giving year on the ChurchWatch toolbar. You can even edit membership data, edit giving records and generate receipts when in a past year context.

When you select an archived year, the year pull-down list will turn red to remind you that you are editing in past year’s data. Some ChurchWatch functions are not available when viewing and editing an archived year.

Note that a snapshot of current membership data is archived along with the giving data. As such if a person changes address and you need it in a past year you will have to edit the address in the past year's data as well.

## The Tax Receipt Editor

The Tax Receipt Editor gives you a much better view and gives you control of the offering amounts included on any given tax receipt. You can also delete tax receipts here. There are also some other simple operations you can perform. Do not confuse the Tax Receipt Editor with the Tax Receipt Manager – these are separate functions.

To display the Tax Receipt Editor, click the EDIT RECEIPT button on the Giving Manager form or the RECEIPT EDITOR button on the Tax Receipt Manager form. The following form will be displayed:

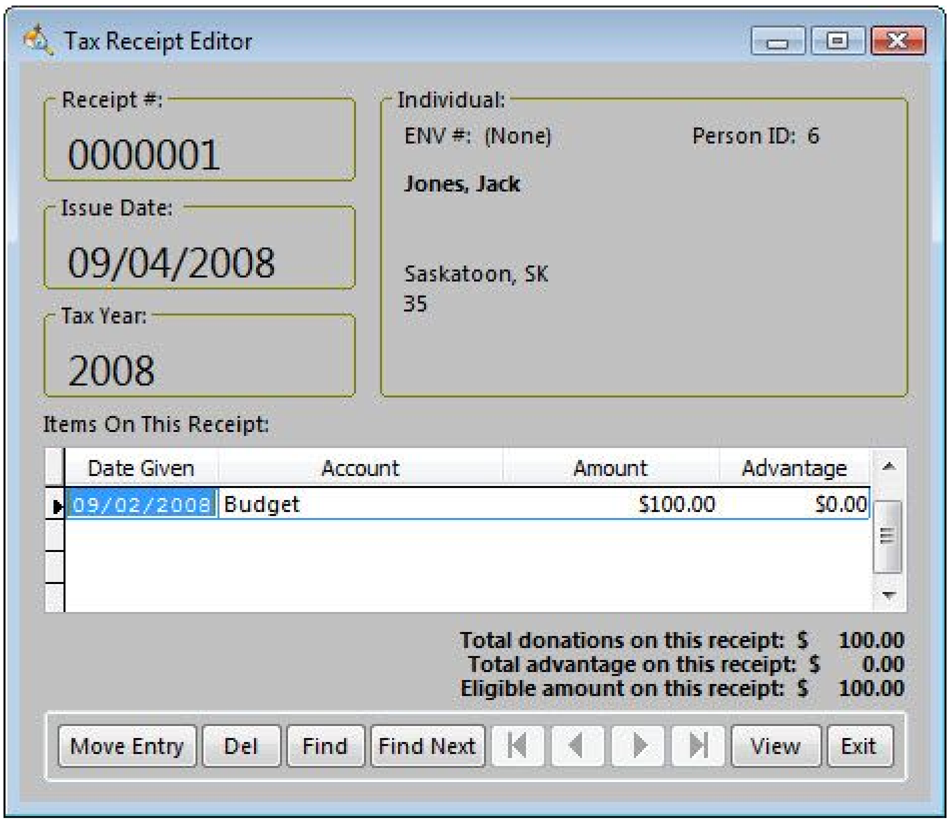



Figure 11-3 The Tax Receipt Editor Form

Table 11-4 lists and explains the items and buttons on the form.

| Form Item | Description |
|---|---|
| Receipt # | The serial number of the current receipt you are viewing is displayed in this box. |
| Issue Date | The date the serial number was issued/created. |
| Tax Year | The tax year the receipt is from is displayed in this box. |
| Individual | This box shows the name, address and envelope number (if assigned) of the person the receipt was issued to. |
| Items On This Receipt | This table shows the date, account, amount and advantage total of each contribution that was included on the current receipt. |
| Move Entry | Click this button to move an offering from one receipt to another. This is useful to correct data entry errors after receipts are generated. |
| Del | Click this button to delete the current tax receipt. This will cause ChurchWatch to clear the tax receipt number from each of the contribution records listed in the table. No giving data is actually deleted. Deleting a receipt is of questionable use unless you have not given a hard copy of the receipt to the individual listed. If you have, deleting a receipt is obviously not recommended and will have implications with your government's tax office! |
| Find | Click the FIND button to find a person by family name or envelope number or to find a specific receipt number. This will find the first matching record. Use FIND NEXT to search again. |
| Find Next | Click this button to repeat the last find. |
| \|< | Click this button to go to the first receipt number. |
| < | Click this button to go back one receipt number. |
| > | Click this button to go forward one receipt number. |
| >\| | Click this button to go to the last receipt number. |
| View | Click the VIEW button to view the tax receipt on screen. |
| Exit | Click this button to exit the Tax Receipt Editor. |

Table 11-4 Tax Receipt Editor Form Items

# *Chapter 12 The Pledge Manager*


The Pledge Manager is useful for keeping track of pledges towards your giving accounts. The Pledge Manager is very similar to the Giving Manager and we recommend you read and understand Chapter 10 first.

## Setting Up

You will need plan and setup your giving accounts before entering giving or pledge records. Refer to Chapter 6 for information on creating and maintaining giving accounts.

## The Pledge Manager Form

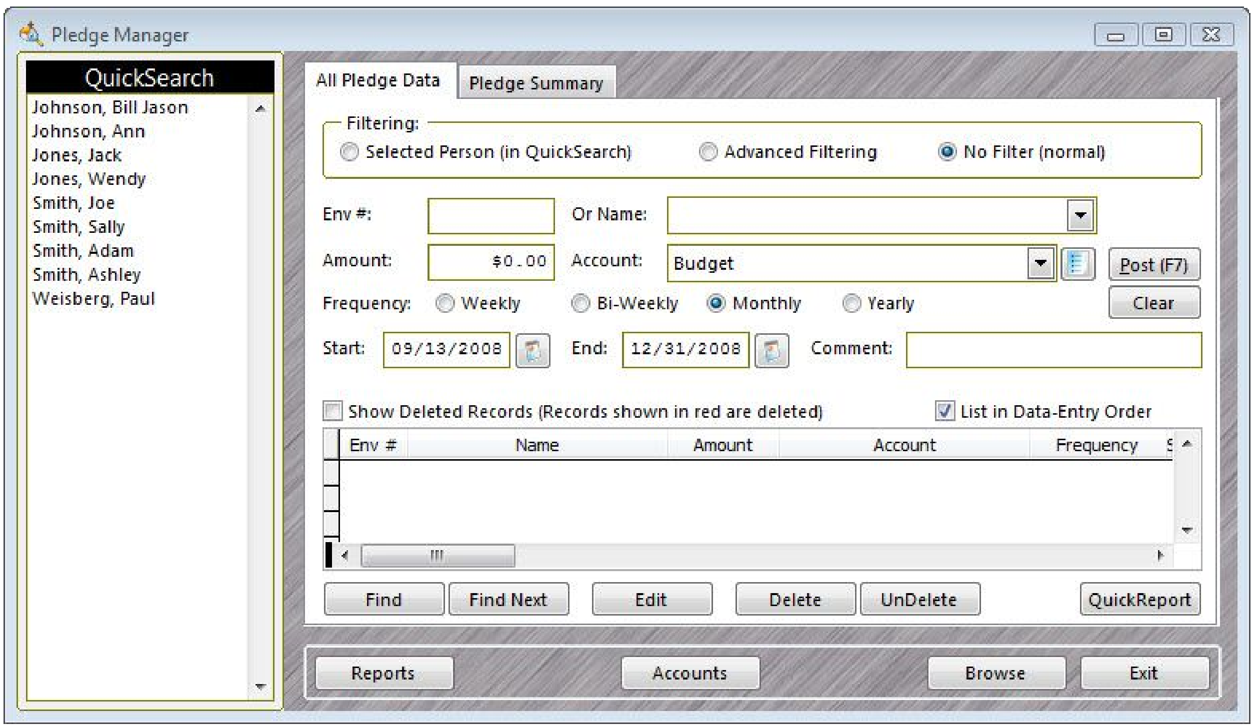



Figure 12-1 The Pledge Manager Form

## Filtering and The QuickSearch List

By default the Pledge Manager uses no filtering on your data (all records are shown) and the QuickSearch list is disabled in this state. You can view the pledges for a single person, and therefore enable the QuickSearch list, by clicking the “Selected Person” radio button. Then select a person from the QuickSearch List. The Advanced Filtering radio button can be used to create a more detailed data filter (refer to chapter 29).

## Pledge Data Entry Area

The area below the filtering box is used for posting new pledges or editing existing records. When the background color of this boxed area is grey, you will be posting new data. When the background color is green, it indicates that an existing record has been loaded for modification (this will be explained later). Table 12-1 examines each item in this box in detail.

| Form Item | Description |
|---|---|
| Env # | If you are using envelope numbers you can start data entry by entering the envelope number here. The person name will automatically be filled in. Check it to make sure you have the correct envelope number. |
| Or Name | You can also directly enter a name instead of an envelope number in this box. If the person has an envelope number assigned, the envelope number will be automatically filled in. |
| Amount | Enter the amount of the pledge here. |
| Account | In this field, enter the name of the giving account the funds are pledged to. |
| Frequency | You have a choice of 4 frequencies: Weekly, Bi-Weekly, Monthly and Yearly. Bi-Weekly is every 14 days. |
| Start Date | Enter the date on which the first contribution will be made. ChurchWatch has many "potential giving" type reports. For most accurate reporting it is important to enter the date of the first contribution rather than the date the pledge was made on. If the first contribution date is unknown use the date of the pledge but recognize that potential giving reports will not be 100% accurate. |
| End Date | Enter the date when the pledge promise expires. |
| Comment | A comment can be entered in this field. |
| BUTTONS | |
| Post | Click this button to POST (save) your data entry. All fields will be checked before posting and you will be warned of any errors. |
| Clear | Click this button to clear all data entry fields. |

Table 12-1 Data Entry Area Items

## Pledge Manager Main Pages

Table 12-2 explains the form items and buttons on each of the Pledge Manager page tabs.

| Field Name | Description |
|---|---|
| PAGE 1 | |
| Show Deleted Records | Check this box to show deleted records in the table grid. Deleted records are shown in red. Used primarily to undelete records. Note that once the data is PACKED in SETUP-MAINTENANCE the deleted records are physically removed and cannot be recalled. |
| List In Data Entry Order | You can change the sort order of the table grid by clicking on a column header. Check this box to list in data entry order. |
| Table Grid | Pledge records are shown in this table. The records shown are controlled by the current filter which is by default all records. |
| Find | Click this button to find a specific record. An important thing to note is that only records within the current filter (those shown in the table grid) will be searched. Only the first occurrence matching the search conditions is found |
| Find Next | Click this button to repeat the last find and find the next occurrence. |
| Edit | Click this button to edit the selected record in the table grid. The Data Entry area will turn green when editing an existing record. If you change you mind about editing the record, click the CLEAR button. |
| Delete | Click this button to delete the currently selected record. |
| Undelete | Select a red deleted record and click this button to undelete it. |
| QuickReport | Click this to get a quick report of all pledge records shown in the table grid. |
| PAGE 2 | |
| Table Grid | Shows a simple summary of pledge data. This report does not show potential giving, just a summary of entered pledge data. There is also a rough estimate of the pledge total per year if all promises were kept. |

Table 12-2 Pledge Manager Main Page Items

## Form Buttons

Table 12-3 explains the form buttons.

| Button | Description |
|---|---|
| Reports | Click this button to open the Report Manager, Pledge reports. |
| Accounts | Click this button to open the Account Names editor to edit or define new accounts. |
| Browse | Click this to view Pledge records in a spreadsheet format. The records shown depend on the current filter (by default there is no filter). |
| Exit | Click this to exit the Pledge Manager. |

Table 12-3 Pledge Manager Buttons

## Adding (POSTing) New Records

To add pledge records, simply enter data in the Data Entry Area and then click the POST button. The record will be added to the table grid.

**Faster Data Entry**

When you begin adding your first pledge records you may find that the process is a bit awkward and slow. The trick to making the data entry go faster is to avoid using the mouse. Practice these steps and you will soon become quite proficient at data entry. We'll assume that the cursor is already located in the envelope number or name field:

| | |
|---|---|
| Step 1 | Enter an envelope number or name. Press the TAB key. If you entered an envelope number you will need to confirm the name and then press TAB again. If you are not using an envelope number press the TAB key to move to the name field. |
| Step 2 | Enter the amount to post. Press the TAB key. |
| Step 3 | You are now positioned in the account field. If the account selected is correct, just press the TAB key. Otherwise type the first few letters of the account name until you find the account you need. Press the TAB key. |
| Step 4 | To enter a frequency use the RIGHT ARROW key, then press the SPACE bar to select. Press the TAB key. |
| Step 5 | Enter a start date and press the TAB key. |
| Step 6 | Enter an end date and press the TAB key. |
| Step 7 | Enter a comment if desired, then press the TAB key, otherwise just press the TAB key. |
| Step 8 | Press the ENTER key to "press" the POST button. |

## Preparing for a New Year - Pledge Archive

Refer to chapter 10 for information on preparing for a new giving year. In the case of Giving records, all records are archived, then deleted. The Pledge Manager is treated differently. When you archive data, the Pledge Manager table is copied to the archive folder but only those records with expired end dates are deleted. With this method, you can have pledge promises that stretch over several years without having to worry about re-entering any data at year end.

## Using Data From Previous Years

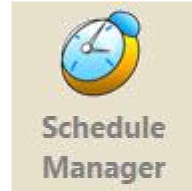
To view and edit data from archived pledge years, simply use the year pull-down box on the ChurchWatch Data Context toolbar.

## Pledge Reports and Potential Giving

There are many pledge reports available in the Reports Manager. Some of these reports introduce a concept called "potential giving". These are sophisticated reports that allow you to predict your future giving based on pledge data for any given time period. The reports of course assume that all pledges will be honored in full and on time.

As of ChurchWatch Version 5, most pledge reports can now cross calendar year boundaries allowing you a wide range of flexible reporting options.

# *Chapter 13 The Schedule Manager*




The Schedule Manager is a very powerful, graphical calendar based, scheduling and facilities management system. With the Schedule Manager you can track and manage:

1. Scheduling for yourself, including private events
2. Scheduling for other people and staff
3. Scheduling of events
4. Scheduling of classes
5. Scheduling of visitations
6. Scheduling of facilities (rooms)
7. Scheduling of resources (church assets)
8. Tracking of attendance
9. Tracking of volunteers and tasks assigned
10. Tracking of meeting minutes

In addition many different views and flexible viewing options are included to allow you to tailor the Schedule Manager view to your own personal tastes and needs.

The Schedule Manager completely replaces the Event Manager, Class Manager, Visitation Manager and Attendance Managers that were included in prior versions of ChurchWatch. Although you can create events, classes and visits, we will refer to all of these simply as "events" through this chapter unless otherwise noted.

***NOTE:*** *We recommend a wide-screen monitor for optimal viewing of the Schedule Manager.*

## Setting Up

Before using the Schedule Manager for the first time, you should check and adjust some of the setup items that pertain to this manager in the Setup Manager. These setups are found on the Scheduling page of the Setup Manager. Refer to figure 13-1 below.

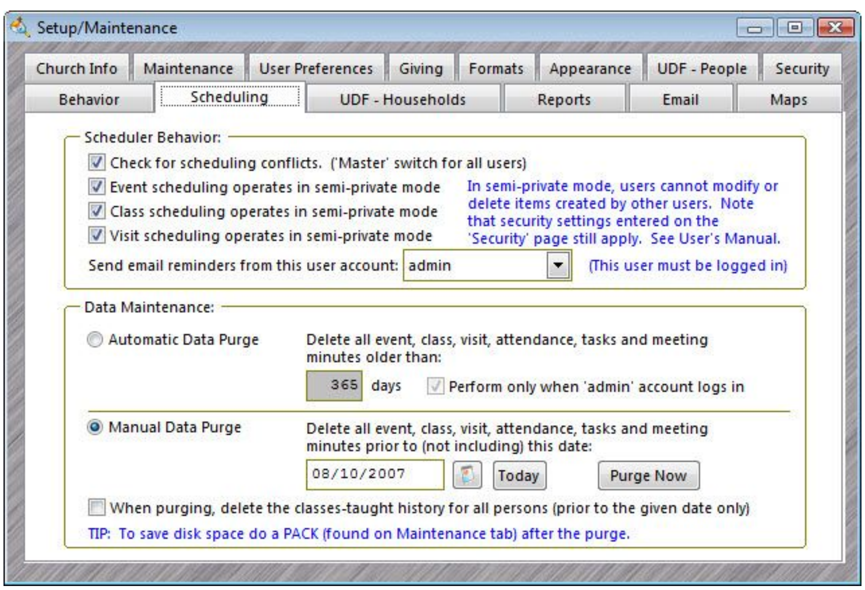


Figure 13-1 Scheduling Options in the Setup Manager

#### Checking For Scheduling Conflicts

The Schedule Manager is capable of quickly checking for scheduling conflicts and notifying you of these conditions. Scheduling conflicts occur when you over-book a person, facility room or resource. To disable this feature (not recommended) uncheck this check box.

**Semi-Private Mode**

Normally, all other users of the ChurchWatch system can make modifications to events, classes and visits that you create. To disable this feature and operate in what is called "semi-private" mode, check one or more of the semi-private mode checkboxes on this page. When operating in semi-private mode, other uses of the ChurchWatch system can view events/classes and visits created by you but they cannot modify them.

**Email Reminders**

The Schedule Manager is capable of sending out email reminders. This will be discussed in more detail later on in this chapter. For now, decide from which ChurchWatch user account the email reminders will be sent. Normally this would be set to the "admin" account. There are several important concepts to understand here and several limitations. First of all, the user account you select must be logged in to ChurchWatch when the email reminders are to occur. Therefore, you should select a user account that is used most often. If the user is not logged on to ChurchWatch at the time the email reminders should be occurring, the reminders will not occur at the correct time. For this reason, email reminders are somewhat limited. Secondly, note that the email options for the selected user will be used to send the email reminders. These are setup on the Email page of the Setup Manager. However, these email options apply differently to each user account and possibly may operate differently on different computers, depending on which computer the user is logged in. **For this reason, the SMTP email option is highly recommended since it is computer independent.**

**Data Purging to Save Disk Space**

The Schedule Manager creates a significant amount of data on your hard disk, especially if recurring events are created and especially if people are assigned to events and classes. Once in awhile, it is recommended that a data purge be performed to reduce the data stored on your disk. The data purge operation is performed here on the Scheduling page of the Setup Manager. After purging data, be sure to perform a PACK on the Maintenance page of the Setup Manager. There are two data purge modes: automatic and manual.

**Automatic Data Purge**

You can set up the system to automatically purge data. Select this option, then select the number of days of data you want to keep. There is also a checkbox to purge the data only when the 'admin' account logs in. If this checkbox is not checked, then the data is purged everytime anyone logs in to churchwatch. We recommend that you check this check box and then log in using the 'admin' account at least once in awhile.

There is also a checkbox option to delete the classes-taught history for teachers if you so wish.

**Manual Data Purge**

You can also purge the scheduling data manually and this may be a better option for you. If so, select the Manual Data Purge option. Next, select the date of the first day's worth of data you want to keep. Then click the Purge Now button. Note that the manual data purge may take a significant amount of time (maybe even ½ hour or more) depending on how much data you are deleting. A progress bar will be displayed during this process.

There is also a checkbox option to delete the classes-taught history for teachers if you so wish.

## The Schedule Manager Form

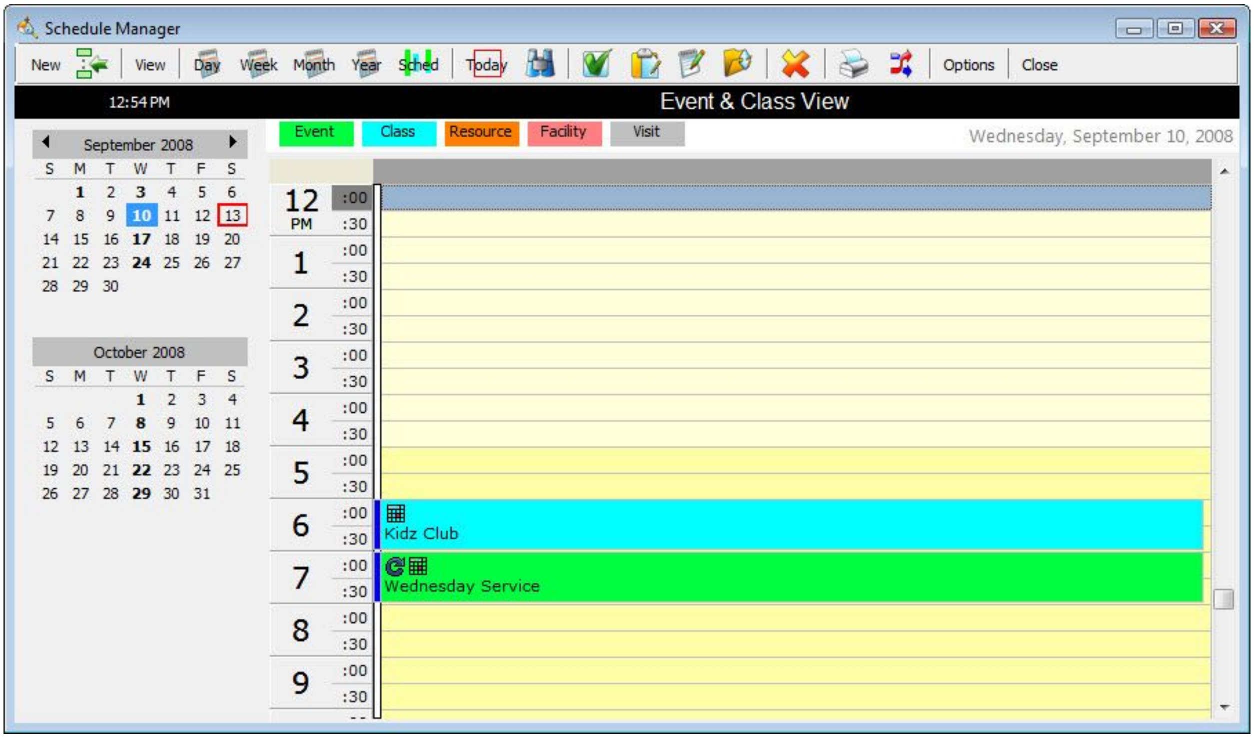



Figure 13-2 The Schedule Manager Form

The Schedule Manager consists of a menu bar near the top of the form, a calendar list on the left side and a main viewing area which is graphical and calendar based and a black title bar that shows the current view mode. You interact with the calendar using the top of form menu and the calendar itself.

## Schedule Manager Options

The viewing format of the Schedule Manager is very flexible and can be adjusted on the options page. There is also an icon legend found at the bottom of the Options page. Table 13-2 describes the options available to you.

| Form Item | Description |
|---|---|
| When Conflict Checking Include Past Dates | Normally this checkbox should be unchecked since dates that have passed are no longer of interest. However, there may be times when you want to check for past conflicts. To include dates and events in the past, check this box. |
| Use Colors For Items | Check this box to use colors in the calendar to differentiate between events, classes, facilities, resources and visitations. If unchecked, all events are always shown in white. |
| Sort Conflict Reports By | Select a sort option for scheduling conflict reports here. |
| **Day View Items:** | |
| Display n Columns | Select the number of columns (ie days) that you want to be visible in the Day View calendar. |
| Allow n Days of Horizontal Scrolling | You can either have the days in the Day View calendar visible at all times or scrollable off-screen. Select the number of days worth of scrolling here. By allowing days to scroll, you will have more room for event text in each day. |
| Time Interval Displayed | This selects the ‘resolution’ of the Day View calendar. Select from 5, 10, 15, 30 or 60 minutes. |
| Flip Back to Day View When Date Selected | Since most editing is done in the Day View calendar, you may want to keep this option checked. When checked, the Schedule Manager flips back to the Day View calendar any time a date is selected. |
| Show Icons | Check this box to show various icons in each event. There are icons for reminders, private events, conflict check excludes, publish in calendar, multi-day events and recurring events. There is an icon legend at the bottom of the Options page. |
| Include Event Description | Normally, just the event name is shown in the calendars. Check this box to also show the event’s description. |
| Print n Columns Per Page | When printing the Day View calendar to a printer, you can select the number of columns to print per page here. |
| **Printing Items:** | |
| Month Print Date Height | This is the height of the Month View calendar. Experiment with different heights until happy with the results. |
| Use Default Height | Check this box to use the default height and to disable the Month Print Date Height entry box. |
| Icon Legend | There is an icon legend at the bottom of this page. These are the icons that may show in each event if “Show Icons” is checked. |

Table 13-1 Tax Receipt Editor Form Items

## Menu Bar

The menu bar is found at the top of the Schedule Manager form.  It contains buttons for often used functions.


From left to right, the functions are:

| | |
|---|---|
| New | Create a new event, class or visit. |
| Manually Insert a New Occurrence | Manually create a new occurrence for a recurring event or class. |
| View Mode | Select a view mode. |
| Day View Calendar | Select the Day View calendar.  All editing is done here. |
| Week View Calendar | Select the Week View calendar.  You can select a day here but no editing can be performed on this calendar. |
| Month View Calendar | Select the Month View calendar.  You can select a day here but no editing can be performed on this calendar. |
| Year View Calendar | Select the Year View calendar.  You can select a day here but no editing can be performed on this calendar. |
| Schedule View Calendar | Select the Schedule View calendar.  You can select a day here but no editing can be performed on this calendar. |
| Find Today | Find today's date. |
| Find an Item | Find an event, class or visit. |
| Attendance Entry/Review | Open the Attendance Manager. |
| Assigned Tasks | Open the Tasks Editor. |
| Meeting Minutes | Open the Meeting Minutes Editor. |
| Various Data Management Tools | Tools for exporting and importing calendar data and syncing with a PDA or smart phone. |
| Delete | Delete the selected event, class or visit. |
| Print | Print what you are looking at. |
| Check For Schedule Conflicts | Perform a manual check for conflict checks. |
| Options | View the options page (see above). |
| Close | Close the Schedule Manager. |

These functions are described throughout this chapter.

## Left-Side Calendar Control

On the left side of the Schedule Manager, you will notice a vertical list of small monthly calendars (refer to figure 13-3).  This control area will be used often.  A date shown with a red box surrounding it is today's date.  Items shown in bold have events, classes or visits scheduled on that date.  A date shown with a blue background is the date currently selected for editing in the Day View calendar.  Click on any date to select that date for editing or viewing.  If the desired date is not shown, use the arrow buttons in the title bar of the first month to shift the visible calendars by one month.

***NOTE:*** *Expanding the vertical height of the Schedule Manager allows more months to be shown.  As many as 4 months can be displayed. A large wide-screen monitor will make you more productive when using the Schedule Manager.*

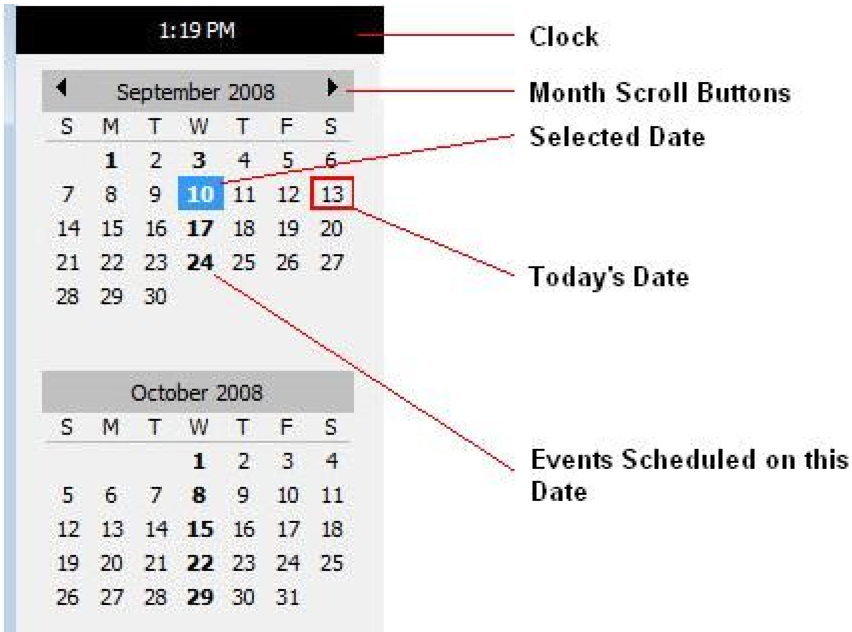



Figure 13-3 Left-Side Calendar Control

## Creating a New Event

There are several ways to create a new event (or class or visit). The simplest way is to select a block of time by clicking and dragging in the Day View calendar and then begin typing the name of the event or class. Then be sure to press the ENTER key on your keyboard to complete the entry. Refer to figures 13-4 and 13-5. Note that visits don't have titles so in this case, select the block of time in the Day View calendar and then press the ENTER key on your keyboard without any text entry.

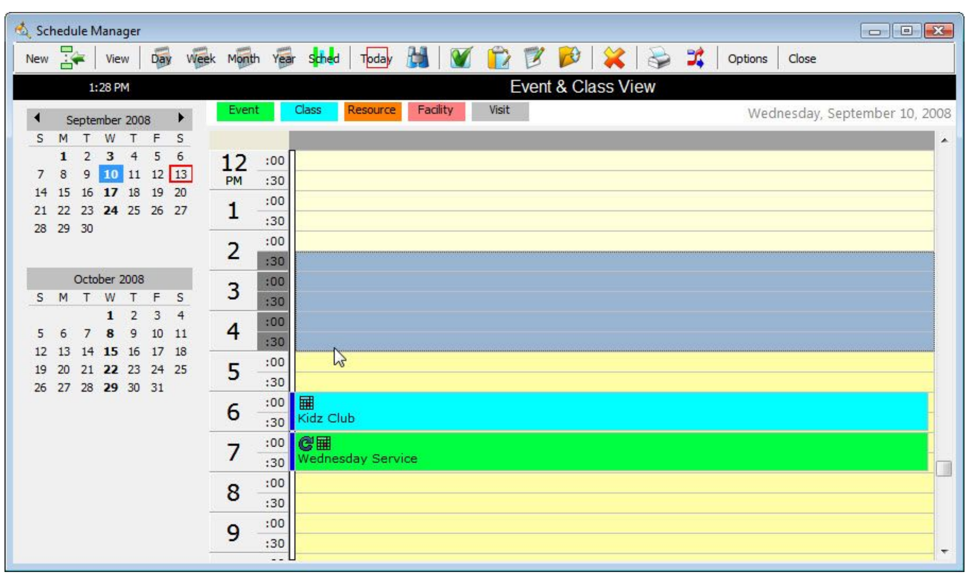



Figure 13-4 Step 1 – Click and Drag to Select a Block of Time

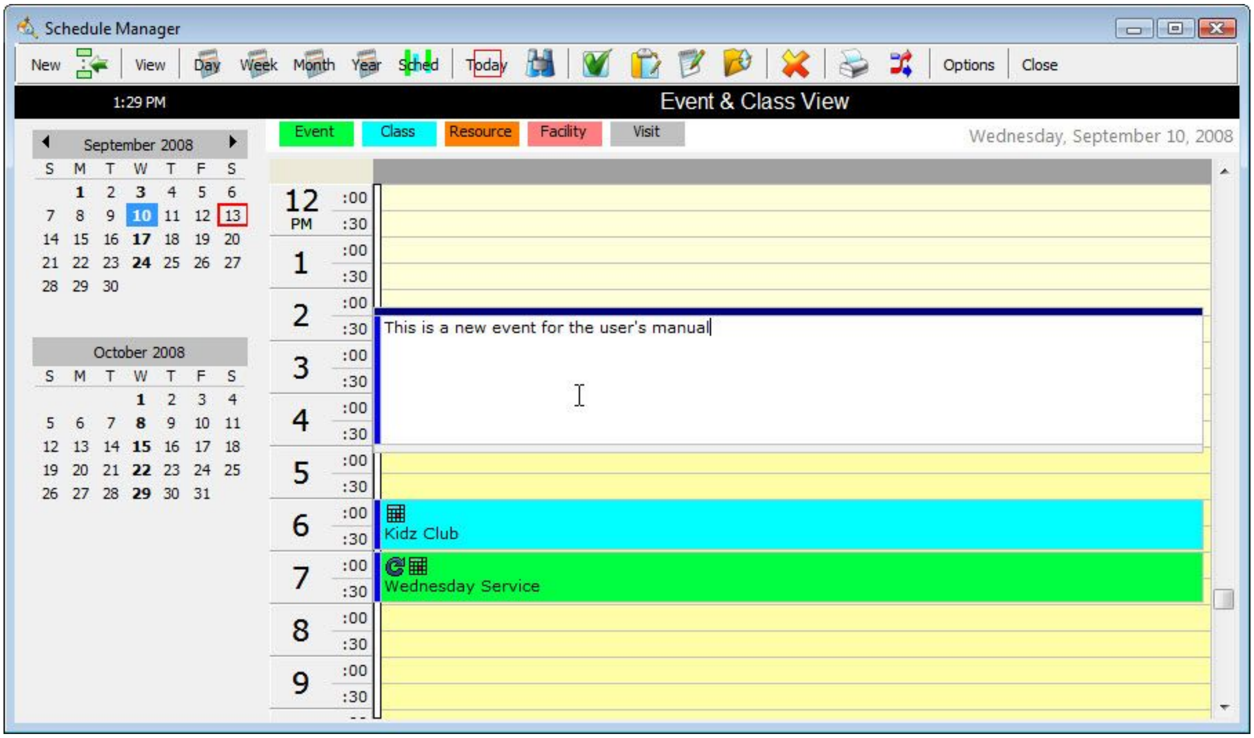



Figure 13-5  Step 2 – Type the Name of the Event, Then Press Enter

The type of event created (event, class or visit) depends on the current view mode.  In the example in figure 13-5, the view mode is the "Event and Class View" (refer to the black title bar) and so the type of event is ambiguous.  If the software cannot automatically determine what you are creating, it will ask you as shown in figure 13-6.

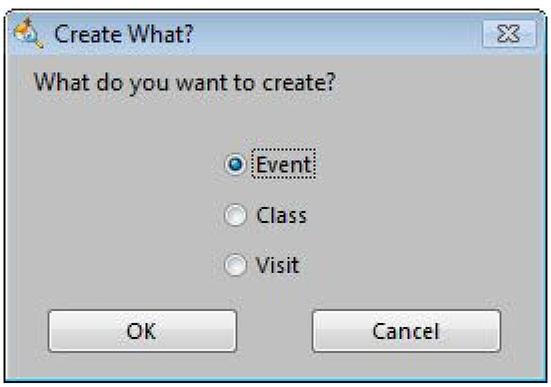



Figure 13-6  Create What? Form

You can also create an event by clicking the NEW button on the menu bar or by right-clicking your mouse in the Day View calendar and selecting New Event, New Class or New Visit.

After creating an event, class or visit, a details form is opened to allow you to continue to modify the options and details for the event.  Refer to the following sections.

**Event Details**

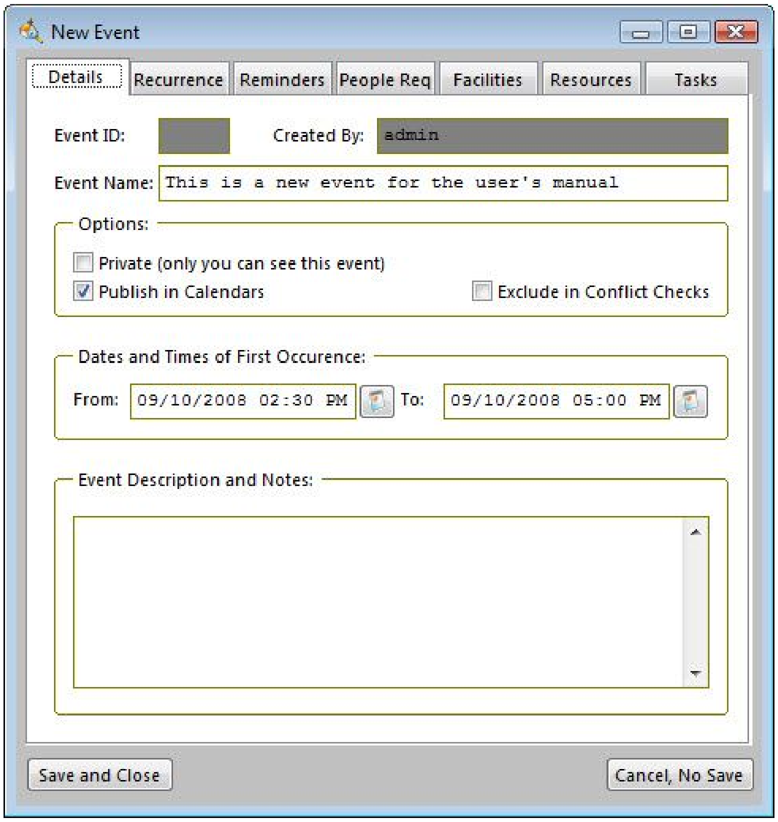



Figure 13-7 A Typical New Event Details Form

The Event Details form contains seven (7) pages. Table 13-2 describes the items in this form.

| Form Item | Description |
|---|---|
| **Page 1 – Details** | |
| Event ID | The event ID is assigned by ChurchWatch and cannot be modified. |
| Created By | The created-by field shows the name of the user that created the event. It is recorded by ChurchWatch and cannot be modified. |
| Event Name | This is the name of the event and if desired, can be renamed here. Starting with ChurchWatch Version 5, event names DO NOT need to be unique. |
| Private | Check this box to create a private event (refer to next section for details). |
| Publish in Calendars | Check this box if this event is to be published in calendar reports. |
| Exclude in Conflict Checks | Check this box if you want to exclude the event from schedule conflict checks. |
| From Date/To Date | Enter the from and to dates/times for the event in these boxes. If you clicked-and-dragged a block of time on the Day View calendar, these will already be filled out but they can be modified here. Enter the dates and times of the FIRST OCCURRENCE of the event. Normally the date would be the same for both the from and to time unless this is a multi-day event. |
| Event Description | You can enter free form notes for a description of the event here. And you can include the description details in the Schedule Manager calendars by selecting this option on the options page of the Schedule Manager. In this case, keeping the description short is a good practice. |
| **Page 2 – Recurrence** | |

| Form Item | Description |
|---|---|
| Frequency | If the event occurs more than once, enter the frequency of the recurring events here. There are many choices. If you cannot find an option that matches the recurrence pattern of your event, choose something close, then manually insert additional events using the manual insertion button on the menu bar of the Schedule Manager (more on this later in this chapter) |
| Occurs Until | If the event occurs more than once, you MUST enter a recurs until date here. ChurchWatch will create all occurrences of the event when you save and close this form, so an end-date is very important. It can always be changed later in the future if you want to extend the event recurrence. |
| **Page 3 – Reminders** | |
| Reminder Options | If desired, choose a reminder option here and enter the number of minutes prior to the event. |
| Email Options | If you chose an email based reminder, you must also set the email options. Select the email address(es) the email should be sent to and some of the other options. |
| **Page 4- People Req(uired)** | |
| Lists | To require (ie schedule) people for an event, move them from the left list to the right list. |
| Groups Button | To add all people from a specific group, click this button. |
| List Free People Only | To reduce the left list to show only people who are free during the event (ie not scheduled for some other event at conflicting times), check this box. |
| **Page 5 - Facilities** | |
| Lists | To allocate facilities (ie rooms) to this event, move them from the left list to the right list. |
| List Free Facilities Only | To reduce the left list to show only facilities that are free during the event (ie not scheduled for some other event at conflicting times), check this box. |
| **Page 6 - Resources** | |
| Lists | To allocate resources (ie assets) to this event, move them from the left list to the right list. |
| List Free Resources Only | To reduce the left list to show only resources that are free during the event (ie not scheduled for some other event at conflicting times), check this box. |
| **Page 7 – Tasks** | |
| List | To reduce the workload later when assigning tasks to people, staff and volunteers, you can pre-create a task list here. This list shows all pre-defined tasks for this event. |
| Add | The ADD button creates a new pre-defined task. |
| Copy From | The COPY FROM button copies all pre-defined tasks from another event. |
| Delete | The DELETE button deletes the pre-defined task that is currently selected in the list above. |

Table 13-2 Event Details Form Items

### Private Events

Private events are created by checking the private event checkbox in this form. Private events are events that can be seen and modified only by you. Going to the doctor would be an example of a private event.

### Multi-Day Events

Multi-day events are events (and classes) that span more than one day. This would be extremely rare unless you wanted to record a multi-day event as one single event entry (for example, a training conference that spans several days).

### Class Details

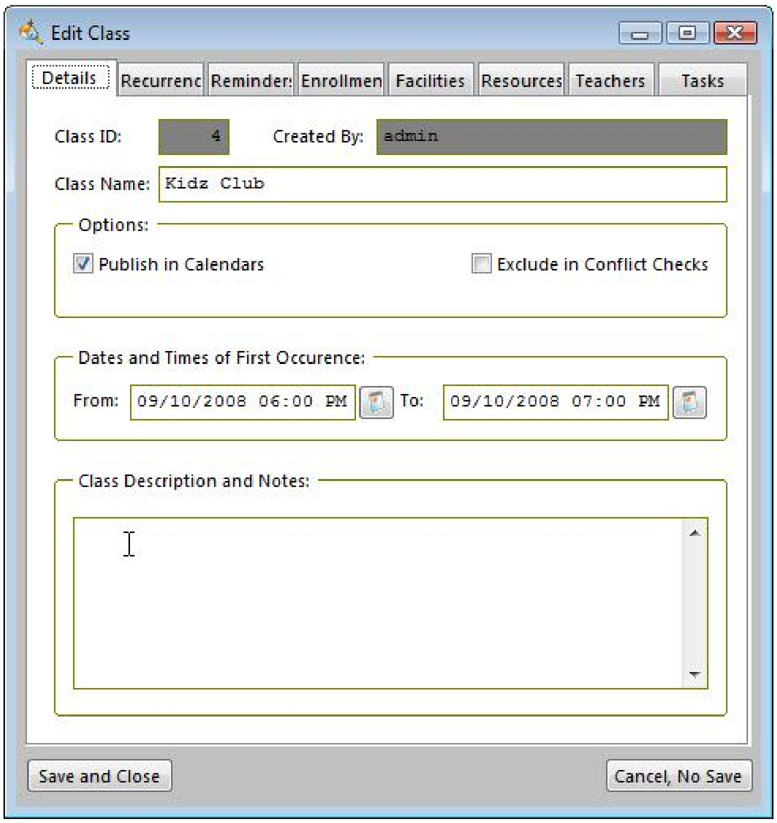



Figure 13-8 Class Details

The Class Details form contains eight (8) pages. Table 13-3 describes the items in this form.

| Form Item | Description |
|---|---|
| **Page 1 – Details** | |
| Class ID | The class ID is assigned by ChurchWatch and cannot be modified. |
| Created By | The created-by field shows the name of the user that created the class. It is recorded by ChurchWatch and cannot be modified. |
| Class Name | This is the name of the class and if desired, can be renamed here. Starting with ChurchWatch Version 5, event names DO NOT need to be unique. |

| Form Item | Description |
|---|---|
| Publish in Calendars | Check this box if this class is to be published in calendar reports. |
| Exclude in Conflict Checks | Check this box if you want to exclude the class from schedule conflict checks. |
| From Date/To Date | Enter the from and to dates/times for the class in these boxes. If you clicked-and-dragged a block of time on the Day View calendar, these will already be filled out but they can be modified here. Enter the dates and times of the FIRST OCCURRENCE of the class. Normally the date would be the same for both the from and to time unless this is a multi-day class. |
| Class Description | You can enter free form notes for a description of the class here. And you can include the description details in the Schedule Manager calendars by selecting this option on the options page of the Schedule Manager. In this case, keeping the description short is a good practice. |
| **Page 2 – Recurrence** | |
| Frequency | If the class occurs more than once, enter the frequency of the recurring classes here. There are many choices. If you cannot find an option that matches the recurrence pattern of your class, choose something close, then manually insert additional classes using the manual insertion button on the menu bar of the Schedule Manager (more on this later in this chapter) |
| Occurs Until | If the class occurs more than once, you MUST enter a recurs until date here. ChurchWatch will create all occurrences of the class when you save and close this form, so an end-date is very important. It can always be changed later in the future if you want to extend the class recurrence. |
| **Page 3 – Reminders** | |
| Reminder Options | If desired, choose a reminder option here and enter the number of minutes prior to the class. |
| Email Options | If you chose an email based reminder, you must also set the email options. Select the email address(es) the email should be sent to and some of the other options. |
| **Page 4- Enrollment** | |
| Lists | To set the enrollment for this class, move people from the left list to the right list. |
| List Free People Only | To reduce the left list to show only people who are free during the class (ie not scheduled for some other event at conflicting times), check this box. |
| Groups Button | To add all people from a specific group, click this button. |
| Promote Button | Select a person in the right list, then click this button to promote (move) them to a new class. |
| Promote Class Button | Click this button to promote (move) the entire class enrollment to a new class. |
| Notes Button | Click this button to create class notes for the person selected in the right list. |
| Award Button | Click this button to assign an award to the person selected in the right list. |
| **Page 5 - Facilities** | |
| Lists | To allocate facilities (ie rooms) to this class, move them from the left list to the right list. |
| List Free Facilities Only | To reduce the left list to show only facilities that are free during the class (ie not scheduled for some other event at conflicting times), check this box. |
| **Page 6 - Resources** | |
| Lists | To allocate resources (ie assets) to this class, move them from the left list to the right list. |
| List Free Resources Only | To reduce the left list to show only resources that are free during the class (ie not scheduled for some other event at conflicting times), check this box. |
| **Page 7 – Teachers** | |
| Lists | To require (ie schedule) teachers for a class, move them from the left list to the right list. |
| List Free People Only | To reduce the left list to show only people who are free during the class (ie not scheduled for some other event at conflicting times), check this box. |
| **Page 8 - Tasks** | |
| List | To reduce the workload later when assigning tasks to people, staff and volunteers, you can pre-create a task list here. This list shows all pre-defined tasks for this class. |
| Add | The ADD button creates a new pre-defined task. |
| Copy From | The COPY FROM button copies all pre-defined tasks from another event. |

| Form Item | Description |
|---|---|
| Delete | The DELETE button deletes the pre-defined task that is currently selected in the list above. |

Table 13-3 Class Details Form Items

**Visit Details**

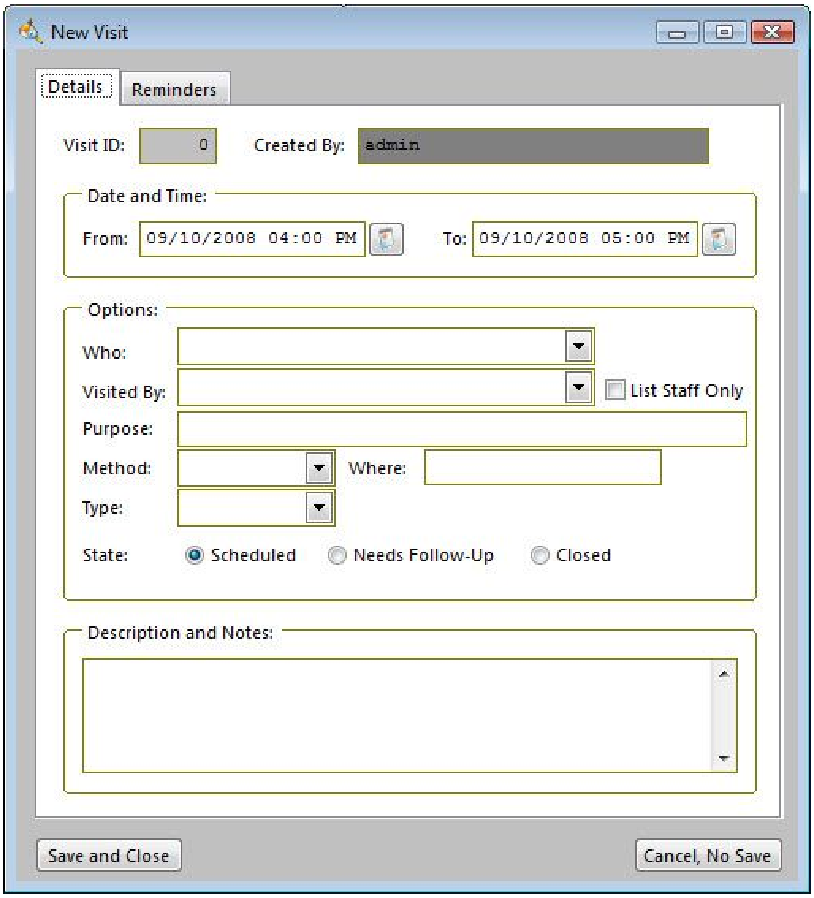



Figure 13-9  Visit Details

The Visit Details form contains two (2) pages. Table 13-4 describes the items in this form.

| Form Item | Description |
|---|---|
| **Page 1 – Details** | |
| Visit ID | The class ID is assigned by ChurchWatch and cannot be modified. |
| Created By | The created-by field shows the name of the user that created the class. It is recorded by ChurchWatch and cannot be modified. |
| From Date/To Date | Enter the from and to dates/times for the class in these boxes. If you clicked-and-dragged a block of time on the Day View calendar, these will already be filled out but they can be modified here. Enter the dates and times of the FIRST OCCURRENCE of the class. Normally the date would be the same for both the from and to time unless this is a multi-day class. |
| Who | Select who is being visited. This person must pre-exist in the Membership Manager. |
| Visited By | Select the person doing the visit. You can reduce the list to staff only by clicking the List Staff Only checkbox. |
| Purpose | You can optionally enter a purpose for this visit. |
| Method | You can optionally select the method of the visit. |
| Where | You can optionally enter where the visit is to occur. |
| Type | You should select the type of visit: first time or follow up. |
| State | You can optionally set the state of this visit. When it is created it is “scheduled”. If a follow up is needed select the “Needs Follow Up”. When the visit or set of visits is complete, you can set the state to closed. These states are used only for your own purposes. |
| Description and Notes | You can enter free form notes for a description of the class here. And you can include the description details in the Schedule Manager calendars by selecting this option on the options page of the Schedule Manager. In this case, keeping the description short is a good practice. |
| **Page 2 – Reminders** | |
| Reminder Options | If desired, choose a reminder option here and enter the number of minutes prior to the class. |
| Email Options | If you chose an email based reminder, you must also set the email options. Select the email address(es) the email should be sent to and some of the other options. |

Table 13-4 Visit Details Form Items

***Note:*** *If you create an event type that is not compatible with the current view mode, you will not be able to see your new event in the calendars until you switch the view mode. For example, if the view mode is “All Events” and you create a new class, it will not appear in the calendars, even though it does exist.*

## Editing an Existing Event

To edit the details or schedule of an existing event, select it, then double click it. If the event is a recurring event ChurchWatch will give you the option of editing only the specific occurrence you have selected or the entire series of events (ie all occurrence of this event). When editing the details of a specific event occurrence, certain items in the detail forms will be disabled. These will be greyed-out in the details form. However, there are many options that can be changed for a single specific occurrence of an event including the options, date/times, people required, facilities and resources. You can also select, then right-click on an event to pop open a short-cut menu. “Edit Selected” is one of the options in this menu.

## Changing the From/To Time of an Existing Event

A very powerful feature in the Schedule Manager is that it is graphical. You can directly interact with the calendars to move or reschedule events. To change the from time of an event, click on the bar just above the event and drag it up or down to the new time. To change the duration of the event, click on the bottom of the event and drag it down or up. To make a more drastic change, for example to move the event to a different day, use the details form(s) and directly edit the from/to dates and times.

## Renaming Events

You can edit the name of an event in the details forms or you can do this directly in the Day View calendar. Click once to select the event, then edit directly in the calendar by typing in the new name.

## Deleting an Event

To delete an event, select it in the Day View calendar by clicking on it. Then click the Delete button (red X icon) on the menu bar. If the event is a recurring event ChurchWatch will give you the option of deleting only the specific occurrence you have selected or the entire series of events (ie all occurrence of this event). You can also select, then right-click on an event to pop open a short-cut menu. Delete is one of the options in this menu.

## Printing

To print the calendar view you are looking at, click the printer icon on the menu bar. This is more or less a simple screen print. For more sophisticated reports, refer to the next section.

## Other Calendar Based Reports

The Report Manager has many schedule based reports including many formats of calendars. ChurchWatch Version 5 now includes multi-page calendars to ensure that all events scheduled for a day appear on the report. These reports span several categories in the Report Manager:

| | |
|---|---|
| **Attendance** | Attendance based reports are found in this category. |
| **Events and To-Do** | You will find many event calendars in this category as well as event based reports, meeting minutes and task schedules. |
| **Classes** | You will find many calendars in this category as well as class based reports, and task schedules. |
| **Facilities and Resources** | This category contains reports for facility and resource scheduling, such as “daily booking” type of reports. |
| **Visitation** | You will find many calendars in this category as well as class based reports, and task schedules. |

## Conflict Checking

If you have this feature turned on in the Setup Manager, ChurchWatch will automatically check for person, facility and resource scheduling conflicts whenever a new event is created or modified. These schedule conflict checks occur very fast and most of the time will not even be noticed. If one of more conflicts are detected, ChurchWatch will present you with the number of conflicts and the details.

You can also perform a manual check over the entire database by clicking the “Check For Schedule Conflicts” button on the menu bar.

## Manually Inserting an Occurrence

If the recurrence pattern does not match the options available to you in the details forms, you can manually insert an occurrence of an event or class. This works only for events and classes that are already marked as recurring. Begin by selecting the event or class you want to clone, then click the “Manually Insert a new Occurrence” button on the menu bar. A calendar form will be displayed. Select the day that you want to insert the occurrence on, then click the OK button.

## Event View Modes

There are many event view modes available. These can be selected by clicking “View” on the menu bar:

| | |
|---|---|
| **My Schedule** | This is your personal schedule. This only works if a membership manager name has been assigned to your ChurchWatch login account name. This is done on the security details form accessed from the Security page in the Setup Manager. |
| **All Events** | Shows all events including church events and your private events. |
| **Church Events** | Shows only church events. Your private events are excluded. |
| **Your Private Events** | Shows only your private events |
| **Classes** | Shows all classes. |
| **Events and Classes** | Shows all events, private events and classes. |
| **Resource** | Shows the scheduling for a specific resource. |
| **Room/Facility** | Shows the scheduling for a specific facility item. |
| **Person** | Shows the scheduling for a specific person. |
| **Staff** | Shows the scheduling for a specific staff member. |
| **Visitations** | Shows visitations. You have a choice of further options. |

***TIP:*** *The black title bar always shows your current view mode.*

***TIP:*** *When the legend is displayed (displayed only when “show colors” is turned on) you can also click on the legend item to filter the view.*

## Calendar View Modes

There are also many different calendar view modes available. These are chosen by selecting one of the calendar buttons or the “Sched” button on the menu bar. Editing is always done on the Day View calendar. There are also calendars for Week, Month, Year and Schedule. The Schedule is a graphical bar graph view of the current week. It shows “loading” or the “busyness” of your church week.

## Finding Today

You can move to today’s date by clicking the Today button on the menu bar.

## Finding an Event

You can find a specific event, class or visit by clicking the “Find an Item” button on the menu bar.

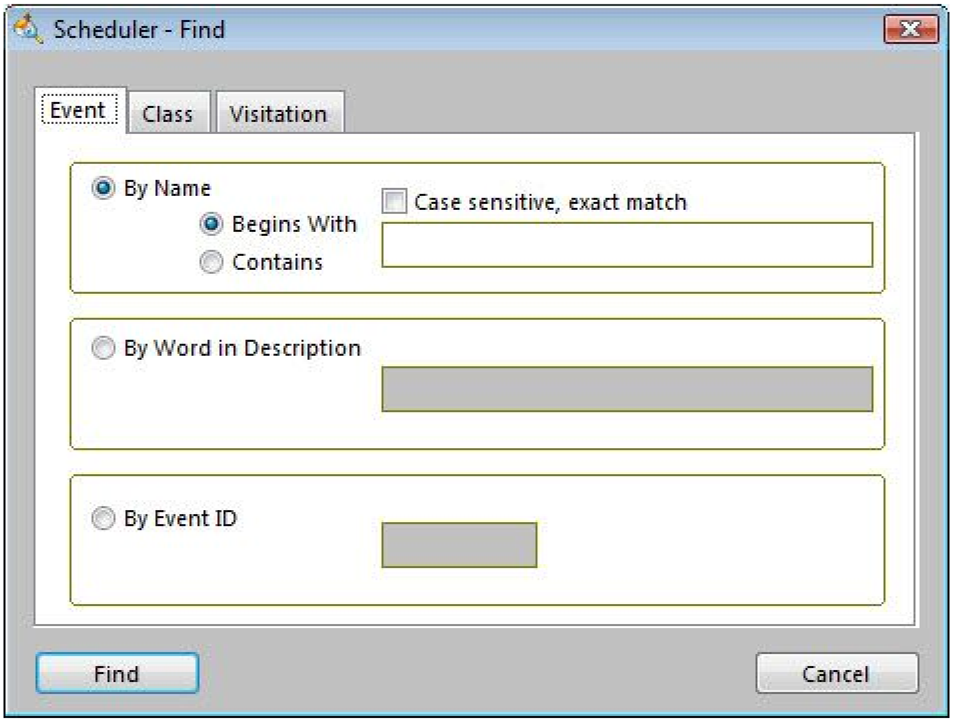



Figure 13-10 Find Form

In the find form, you have the options of searching for an event, class or visitation by name, by word in the description or by the specific id (if known). If multiple events satisfy the search, ChurchWatch will present you with a list of the found events. Choose one to view it. Note also, that if the current view mode is not compatible with your search ChurchWatch will automatically change the view. For example, if you are in the "All Events" view and you search for and choose a class, ChurchWatch will automatically switch to the Class view.

## Data Management Tools

There are three (3) options available in this menu. Data Management Tools are accessed from the menu bar. You can import a standard iCalendar file, export a standard iCalendar file or do a Data Cleanup. "iCalendar" is an industry standard for moving data between calendar programs.

Importing an iCalendar file is handy for importing data from another calendar program, such as Microsoft Outlook ™. You would need to export data from your calendar program in iCalendar Format, then import it into ChurchWatch.

Exporting iCalendar data is handy for copying your church calendar data to another calendar program. You can even use this to sync your Church calendar with your pocket PDA or Smart Form (refer to the next section).

Data Cleanup is used to command ChurchWatch to scan and clean up the many data tables associated with the Schedule Manager. This will check and correct any problems. Note that if you have a large amount of data in the Schedule Manager, this may take some time. Using this feature is not normally needed unless you encounter some sort of problem. Click this option to see if the problem clears.

## Exporting Calendar Data to a PDA or Smart Phone

You can export your church calendars to any device that is compatible with standard iCalendar files (most are). Any PDA that can synchronize with Microsoft Outlook or other calendar program can be used with this procedure. Most

PDA's are capable of this. Any calendar program can likely be used but our example below uses Microsoft Outlook 2003 ™.

**STEP 1 - We need to export the calendar data out of ChurchWatch**

a. Launch the Schedule Manager and then click on the Data Management Tools icon on the toolbar. Chose "Export an iCalendar File"


Figure 13-11 Exporting an iCalendar File

b. In the form that is displayed, chose the appropriate options for your export, then click the EXPORT button.

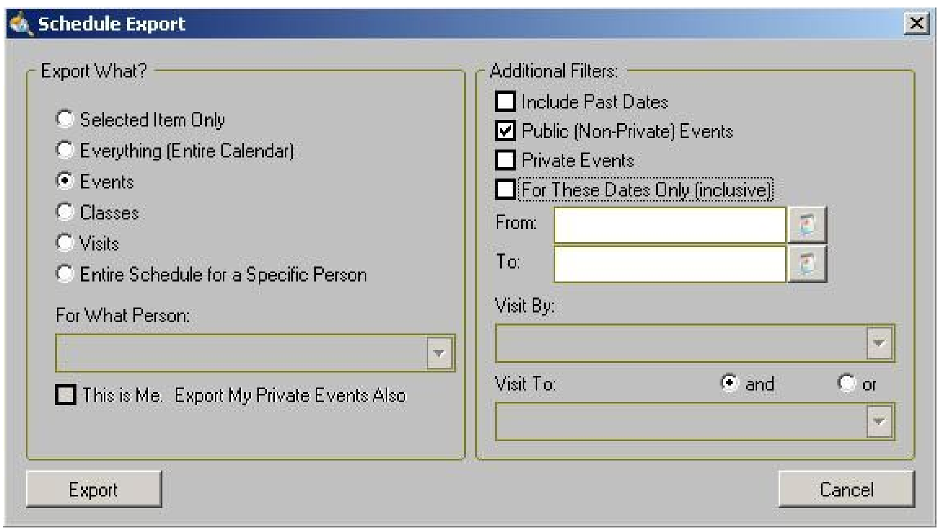



Figure 13-12 iCalendar Export Options

c. In the file explorer window that is displayed, chose an appropriate location and enter a filename. In our example below we have chosen c:\test.ics. Be sure to use the .ics file extension. Click the SAVE button when ready.

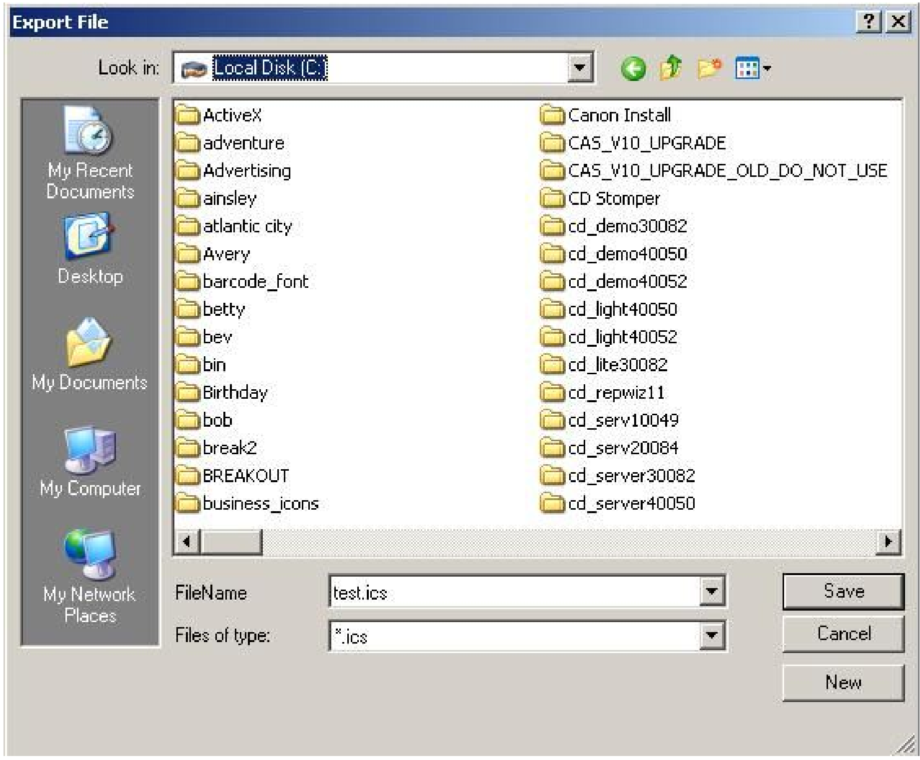



Figure 13-13  Entering the File Name to Save to

**STEP 2 - Now we need to import the data to Microsoft Outlook (or other calendar program)**

a. In this example, we created an event called "Test Event". You'll see it appear in Outlook in a moment.

b. Launch Microsoft Outlook and chose FILE->IMPORT AND EXPORT. Your version of Outlook may differ and other calendar programs may do this differently. Refer to the built-in help and search for "iCalendar" or "importing iCalendar" for more instructions. Here is an example of Microsoft Outlook 2003:

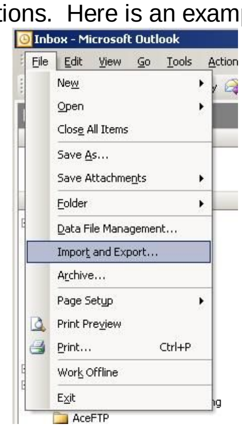



Figure 13-14  Importing iCalendar File Into Outlook

c. When asked, chose iCalendar file format. Then click NEXT, locate the file you created in step 1 and follow the instructions.


Figure 13-15  Outlook Import Options

d. The data will be imported into Outlook. The import will not affect your existing calendar data in outlook unless the same event is imported more than once. In this case, the original will be overwritten. Here is our sample event "Test Event", exported from ChurchWatch, imported into Outlook 2003 and now showing up there. The "CW" prefix indicates the event originates in ChurchWatch.

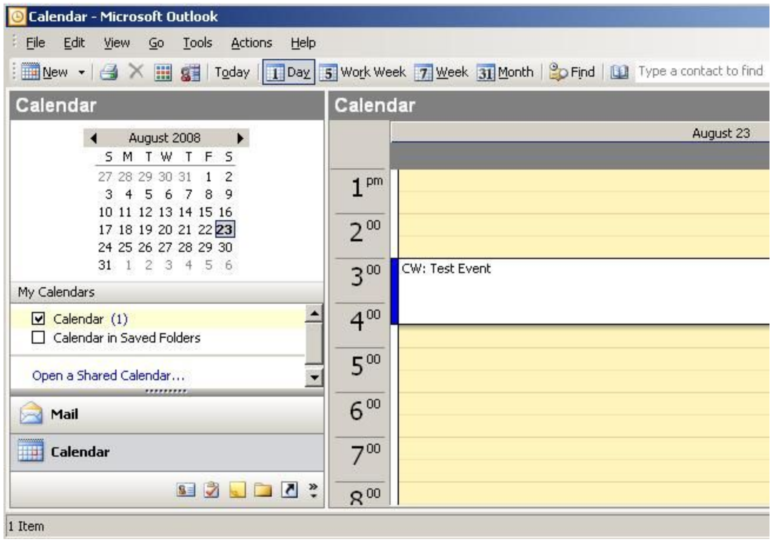



Figure 13-16  ChurchWatch Calendar Data Imported Into Outlook

**STEP 3 - Syncing with your PDA**

a. Finally, follow your normal procedures for synching your PDA with your PC's calendar program. This is almost always done with Microsoft ActiveSync that comes with your Pocket PC. Other devices, such as BlackBerry (tm) may vary in method. Note that you may need a newer version of ActiveSync for your particular PDA or phone. We are using Version 4.5 in this example. Here is an example screen shot of ActiveSync set for "standard partnership" syncing with an HP iPAQ phone that is running Windows Mobile 2003.


Figure 13-17 Microsoft ActiveSync

b. After syncing, the ChurchWatch calendar items should show up in your PDA or phone's calendar. Here is a photo of our example event after syncing with an HP iPAQ phone. The entire process takes just seconds.

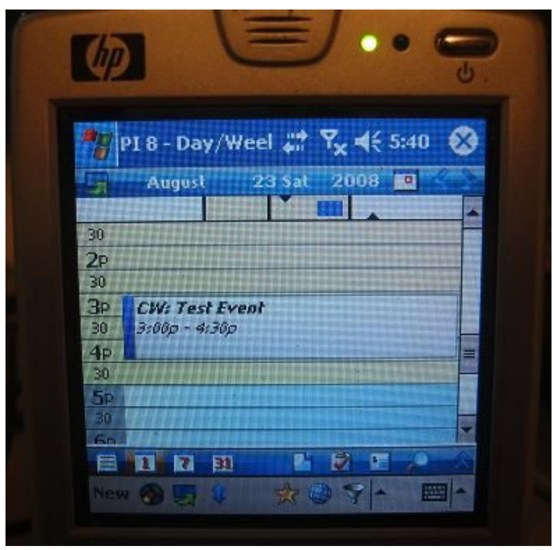



Figure 13-18 ChurchWatch Calendar Data on a Smart Phone

***TIP:*** *You can create more than one calendar in Outlook. This would allow you to keep your ChurchWatch calendar data separate from your other calendar data.*

### The Problem of Duplicate Imported Events

Most calendar programs, including Microsoft Outlook will create duplicate events if the same event is imported more than once. This creates an awkward situation when trying to keep your PDA in sync with your ChurchWatch calendar. There are a few suggested solutions to this problem:

1. Export by date from ChurchWatch. In the export form (see step 1b above) you can export by date. Use the "for these dates only" filter to make sure that you never export the same event twice. Unfortunately this method has a serious drawback. If you create one or more events in a date range that has already been exported it will not be easy to export these new events using the "for these dates only" filter
2. Create a new calendar in Outlook for the purpose of acting as a go-between for ChurchWatch and your PDA. Always delete all events in this Outlook Calendar before re-importing the entire calendar. Then always export all events from ChurchWatch to completely refresh your Outlook calendar, and hence your PDA as well.
3. Simply delete the duplicate calendar items in Outlook. Here is a Microsoft Knowledgebase article on the method: http://office.microsoft.com/en-ca/outlook/HA011424371033.aspx?pid=CL100626971033
4. Microsoft indicates that you can select "do not import duplicates" during the Import. However, we have been unable to find this option in Outlook 2003. It may be present in Outlook 2007 but we cannot confirm.

Some experimentation may be required and you may find better methods.

## Attendance Manager

The Schedule Manager also has a built-in Attendance Manager. Begin by selecting an event in the Day View Calendar, then click the Attendance Manager button on the menu bar.

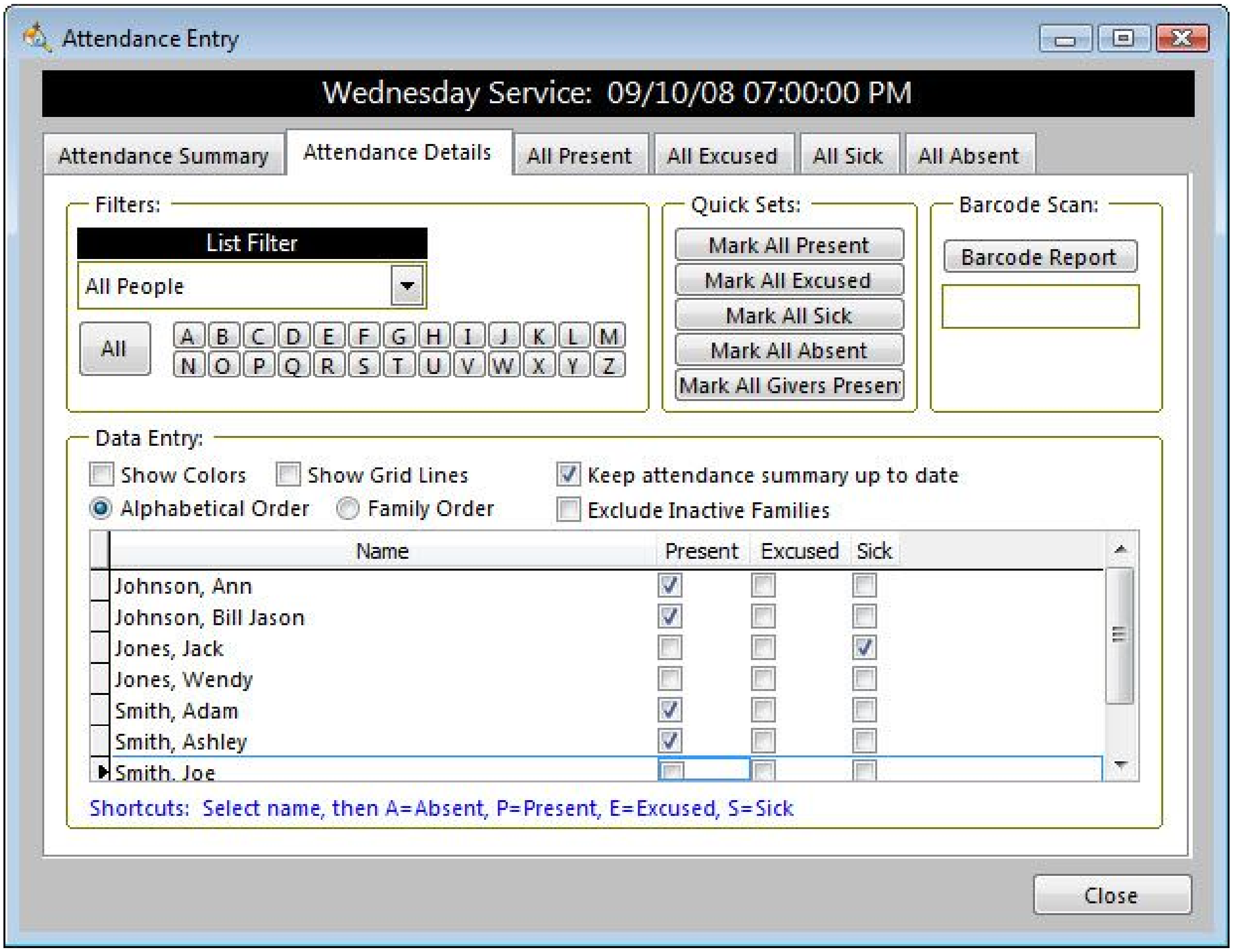



Figure 13-19 The Attendance Manager

The Attendance Manager is used to enter attendance for a specific occurrence of an event or class.

### Recording Methods

The Attendance Manager provides several ways to record Attendance information. You can record:

- a simple attendance summary, which is just the number of people attending an event.
- an attendance summary by membership types. This allows you to record the number of people in each membership category to provide slightly deeper statistics.
- detailed attendance by person. You can record in detail each person that was present, excused, sick or absent from the event.
- a combination of the above. You can record both details and summary if you want. In fact, ChurchWatch will keep the summary information up to date automatically if you wish.

The Attendance Manager form consists of a set of pages for entering attendance information. The form always works on the event that was selected in the Schedule Manager. The name of the current event also appears in the title bar near the top of the form. Always make sure you have chosen the correct event and date combination before entering any attendance data.

**Attendance Summary Page**

The Attendance Summary page is the main page of the Attendance Manager. Use this page if you are not interested in recording the details of who attended. This page simply records the number(s) of people attending the event. There are two possible ways to record the summary data:

**Step 1** Select the attendance summary category. If you just want to record the number of people attending the event, choose "General Summary". If you would like to record the attendance data in a slightly more detailed way you can set the membership level to record how many people of a specific level attended. For example, you could pick "Full Member". Of course, this second method will require several entries to complete the attendance for a single event because you likely have several membership levels to keep track of.

**Step 2** Enter the attendance (how many people attended).

**Step 3** Click the SAVE button to save the attendance. The record will be shown in the summary list beside the SAVE button.

To correct a record, select the category again and enter a new attendance number. Click SAVE and the record will be automatically updated. Use the DELETE button to delete a record.

### Attendance Details Page

Use the Attendance Details Page to record specifically who attended or did not attend an event. You can also check the "Keep Summary Up To Date" checkbox to have ChurchWatch automatically keep the summary information up to date while you enter the detailed attendance. Table 13-5 explains each item on this page.

| Form Item | Description |
|---|---|
| List Filter | If you would like to reduce the list of people in the attendance list to something more manageable such as people enrolled in a class, you can select a filter here. Using a filter along with one of the "Mark All..." buttons can make attendance entry much easier. The possible selections are:<br><br>All People — All people in the database.<br>People Required — Only those people required at an event. Not valid for classes.<br>Class Enrollment — Only those people enrolled in a class. Not valid for an event.<br>Directory — Only those people marked for the church directory.<br>All Men — Men only.<br>All Women — Women only.<br>All Children — Children only.<br>Main Contacts — Main contacts of households only.<br>Spouses — Spouses only.<br>'Others' — People with authority set to 'other' only.<br>Specific Group — Only those people in a specific group.<br>Specific Membership — Only those people with a specific membership level.<br>Specific Need — Only those people with a specific need.<br>Specific Talent or Ministry — Only those people with a specific time & talent.<br>Specific Marital Status — Only those people with a specific marital status.<br>Custom Filter — Any filter of your choice. Refer to Chapter 29. |
| "All" and letter buttons | Click the ALL button to set the filter condition to "All People". Click a letter button to reduce the list to people with last names that begin with the letter selected. |
| Mark All Present | Click this button to mark all people in the attendance list present. |
| Mark All Excused | Click this button to mark all people in the attendance list excused. |
| Mark All Sick | Click this button to mark all people in the attendance list sick. |
| Mark All Absent | Click this button to mark all people in the attendance list absent. |
| Mark All Givers Present | Click this button to mark all people who gave offerings that day present. Note that ChurchWatch does not track offerings specific to this event. Anyone who gave an offering on the day of this event will be marked present so some caution is advised. |
| Barcode Report Button and Scan | See "Using Barcodes to Track Attendance" below. |
| Show Colors | Click this to show colors in the table grid. This can assist in data entry. |
| Show Grid Lines | Click this to show grid lines in the table grid. This can assist in data entry. |
| Keep Summary Up To Date checkbox | Check this box to cause ChurchWatch to automatically keep the attendance summary correct and up to date based on the attendance details. ChurchWatch will record summary information by membership level. |
| Exclude Inactive Families | Check this box to filter out inactive families from the list. Inactive families are marked so in the Membership Manager. |
| Sort Orders | Choose between alphabetical order or family order. Affects attendance list. |
| Attendance List | Use the attendance list to enter detailed attendance information. You may check one of Present, Excused or Sick or leave all three unchecked for Absent. |

Table 13-5 The Attendance Details Page Items

### Absentees

To mark a person absent from the event, simply do not check any of the Present, Excused or Sick checkboxes.

**Other Attendance Manager Pages**

The other pages in the Attendance Manager are reporting pages that list all people present, excused, sick or absent. You can print this list by clicking the Print button.

**Using Barcodes to Track Attendance**

To reduce data entry time, you can enter data by barcode scan. This feature requires the use of barcode scanner with a keyboard wedge interface. This type of interface inserts keycodes directly into the keyboard buffer of your PC, just as if you had typed them yourself. ChurchWatch uses the Code 3 of 9 barcode font and your barcode scanner must be enabled to read this type of barcode. Set your barcode scanner to strip any leading or trailing checksum digits.

Begin by clicking the Barcode Report button in the Attendance Manager to create a barcode report of all people currently in the Attendance list. A partial example report is shown below.

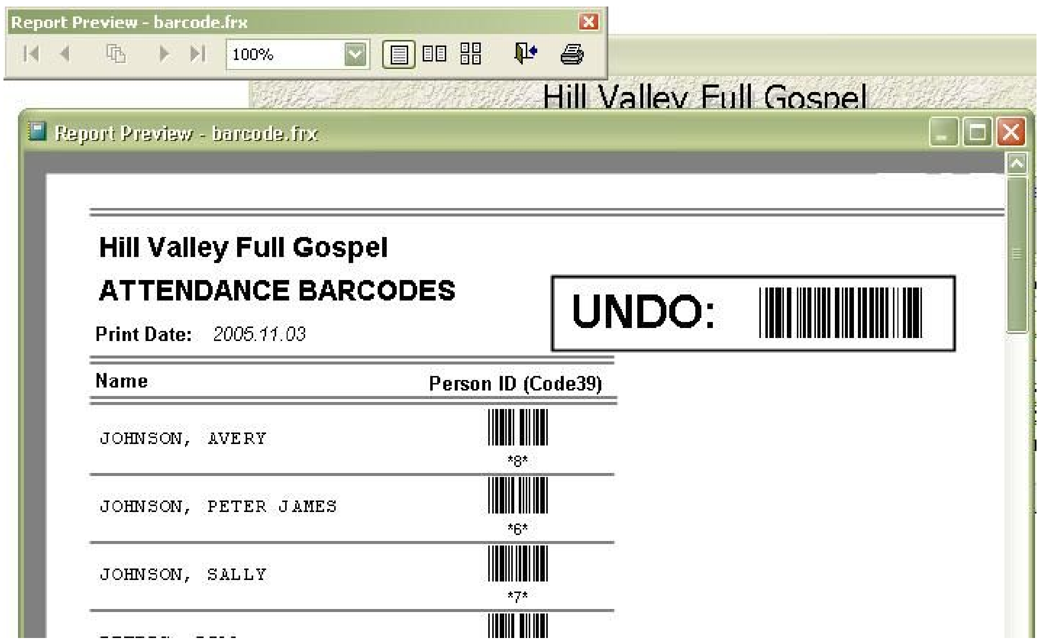



Figure 13-20 Sample Barcode Attendance Report

Next, position your mouse in the “Scan” field on the Attendance Details page.

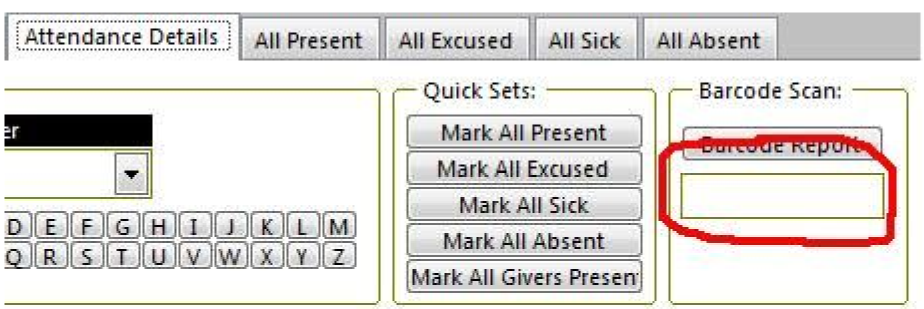



Figure 13-21 Scan Field in the Attendance Manager

At this point you may begin scanning barcodes on the report for all people present. If you make a mistake, simply scan the UNDO barcode near the top of each page of the report to mark the last person absent. You may scan the UNDO barcode as many times as necessary to roll back your data entry. The cursor will remain in the scan field during barcode scanning.

## Tracking Meeting Minutes

The Schedule Manager allows you to record the minutes from meetings. You could also record general notes here. First select a class or event from the Day View calendar, then select the Meeting Minutes button on the menu bar. There are no font or other formatting capabilities in the edit window.

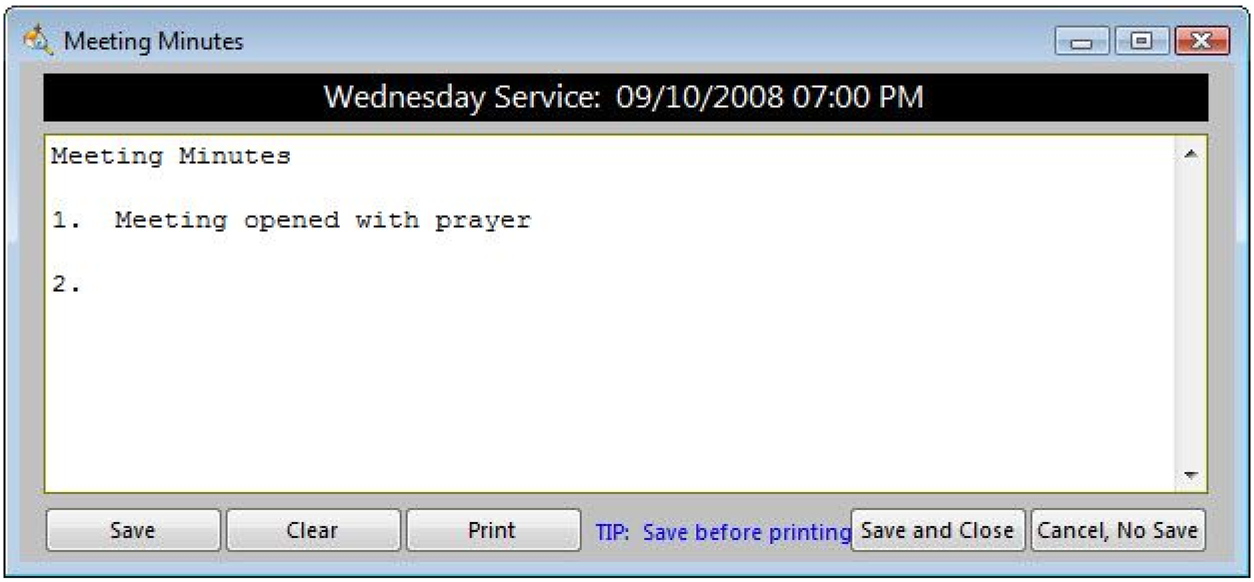



Figure 13-22 Meeting Minutes Form

Table 13-6 explains the buttons on this page.

| Button | Description |
|---|---|
| Save | Saves the meeting minutes but keeps the form open. |
| Clear | Clears the meeting minutes window. If this was unintentional, click the Cancel, No Save button and start again. |
| Print | Print the meeting minutes. |
| Save and Close | Save the meeting minutes and close the form. |
| Cancel, No Save | Close the form without saving anything. |

Table 13-6 The Meeting Minutes Form Buttons

## Volunteer Management and Assigning Tasks

The Schedule Manager can be used to track volunteers and tasks assigned to volunteers, staff and other people. Note that a person does not need to be required or enrolled in an event or class to have tasks assigned to them. So you can assign tasks to anyone who is currently defined in the Membership Manager.

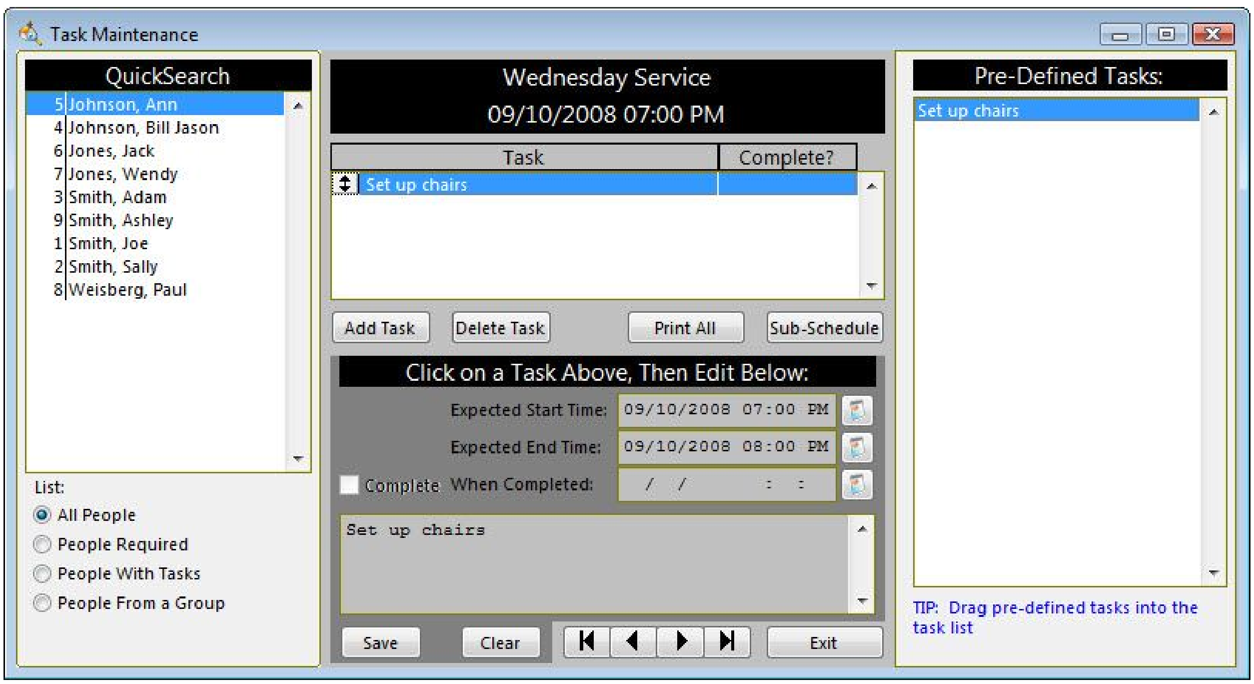



Figure 13-23 The Task Maintenance Form

### QuickSearch List

The QuickSearch list, which is found on the left side of the form, lists people who you can assign tasks to. Normally this is all people but you can filter this list to make it easier to deal with. Use the filter buttons below the list to choose a specific filtering. <u>Select a person in this list to view and edit their tasks</u>.

### Pre-Defined Tasks and Quick Task Assignment

Recall that tasks can be predefined in the Schedule Manager when the event or class is created. These pre-defined tasks will appear in the list on the far right side of the Task Maintenance form. This is where the pre-defined tasks really pay off. You can click, drag and drop a pre-defined task into the task list for the selected person to quickly and easily “assign” a task to a person. “Drag and Drop” is achieved by clicking on the pre-defined task of interest and while holding the left mouse button down, drag it over to the task list. Then let go of the mouse left button to “drop” the task into the list.

### Manually Creating and Assigning Tasks

You can also manually create and assign tasks. Begin by selecting the person of interest in the QuickSearch list. Next click the Add Task button. A new task called “<fill this in>” will be created and will become immediately visible. In the task list in the middle upper of this form, click on the task to select it. Then in the grey area in the middle bottom of the form, edit the task name. The grey area will turn green when you have unsaved edits. Figure 13-24 shows an example. The figure shows the state of them form when in the middle of an edit. Note that the task is selected in the task list (middle upper of the form) and that the grey edit area near the middle bottom of the form is now green. The edit is still in progress (“Set up tables”) but it has not been saved yet. If desired you can set the expected start and end time for the task to create a sub-schedule within the event. This sets time goals for completion of the tasks and you can tell when tasks are unfinished and overdue. Click the SAVE button to save the edits.

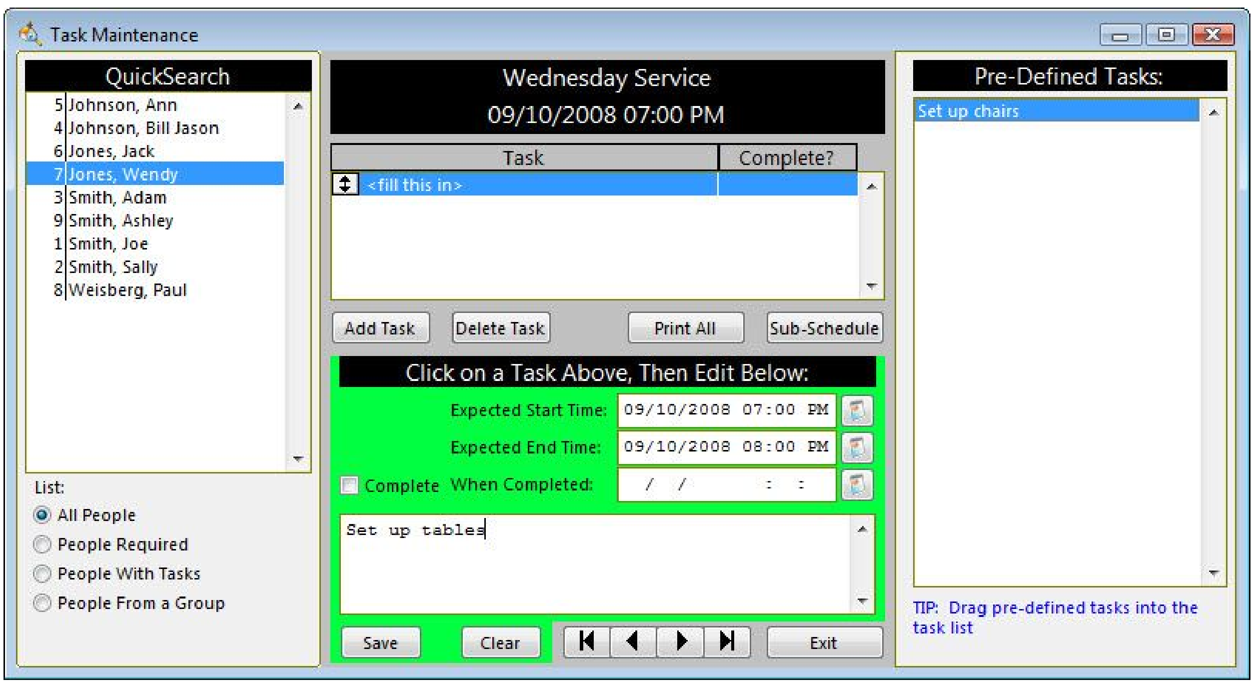


Figure 13-24 A Task Edit in Progress

**Other Buttons**

Table 13-7 explains the buttons on this form.

| Button | Description |
|---|---|
| Add Task | Click this button to create a new task. |
| Delete Task | Click this button to delete the selected task. |
| Print All | Click this button to print a task sheet that shows all tasks for this event, who they are assigned to, and whether or not they are completed yet. |
| Sub-Schedule | Assuming you have set the start and end expected completion times, click this button to view the sub-schedule – that is the time that all tasks are to be completed. In the schedule form that is displayed, use the horizontal scroll bar to see all dates involved. If you can't see all tasks you likely need to move the scroll bar. You can also print a graphical calendar from here. |
| Save | Click this to save any edits. This is necessary when the bottom middle area is green in color, which indicates you have unsaved changes. |
| Clear | Click this button to clear the task edit window. |
| \|< | Click this to move to the first task in the selected person's list. |
| < | Click this to move to the previous task in the selected person's list. |
| > | Click this to move to the next task in the selected person's list. |
| >\| | Click this to move to the last task in the selected person's list. |
| Exit | Click this to exit the Task Maintenance form. |

Table 13-7 The Meeting Minutes Form Buttons

**Reports Associated With Tasks**

There are many powerful reports in the Report Manager that pertain to Volunteer and Task management. In the Report Manager, select the "Events & To-Do" or "Classes" categories of reports. Then choose one of the many Task Schedule reports that are available. These are very powerful reports that have many options.

# *Chapter 14 The Library Manager*


The Library Manager is designed as a simple way to keep track of items in a church library. The Library Manager can keep track of books, magazines, cassettes, videos etc and can keep track of borrow status on all items.

## The Library Manager Form

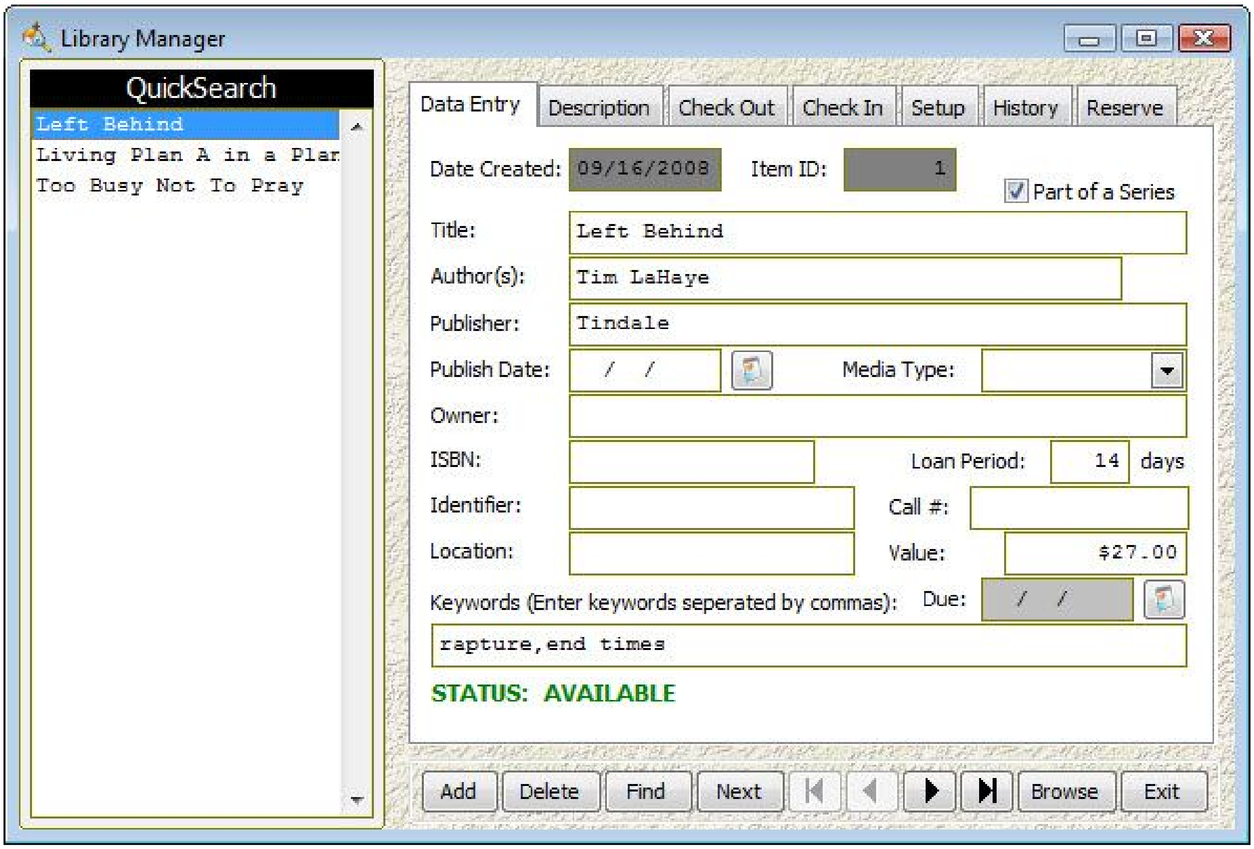



Figure 14-1 Library Manager Form

The Library Manager consists of the usual QuickSearch list and 7 pages on which you can enter information about a library item and interact with the library database. The Library Manager has a sophisticated FIND command that can search by title, identifier, keywords or author.

You can also create library cards and check-in/check-out items using barcode scans.

| Form Item | Description |
| --- | --- |
| PAGE 1 | |
| Date Created | The date the library entry was created. |
| Item ID | Unique ID used internally by ChurchWatch. |
| Part of a Series | Check this if the item is part of a series |
| Title | The title of the item. Can be any text. |
| Author(s) | Authors of the title. |
| Publisher | The publisher of the title. |
| Publish Date | Date of last publishing. |
| Media Type | Set the media type using the pull down list. |
| Owner | Owner of the item. |
| ISBN | ISBN number. ISBN numbers are checked for correct format using the ISBN algorithm. |
| Loan Period | Enter the default loan period here |
| Identifier | Any identifier other than ISBN. |
| Call # | Call #. |
| Location | Location of this item within your church library. This field is free-form text. |
| Value | Monetary value of the item. |
| Due | You can view and/or alter the Due Date for a borrowed item here. |
| Keywords | You can enter a set of keywords to help you find the item at a later date. Keywords should be separated by commas and should contain no spaces. For example Parenting,Children,Discipline |
| Status | Loan status of the item |
| PAGE 2 | |
| Description | Enter any free-form notes or comments in this text box. |
| PAGE 3 | |
| Scanner box | For more information see paragraphs below concerning barcode use. You can scan library cards AND library item barcodes here. ChurchWatch will automatically tell the difference. |
| Manual Check Out box | For more information see paragraphs below concerning checkout |
| Clear List | Click this button to clear the check-out list. This should be done before beginning checkouts for a new person. |
| Print On-Loan List | Click this button to print the check-out list. This is a handy report to give to the borrower for easy reminder of what was borrowed and what needs to be returned. |
| PAGE 4 | |
| Scan Library Item(s) Here | For more information see paragraphs below concerning barcode use. |
| Check-In Manually | If not using barcodes, click this button to check-in the currently selected item manually. |
| Clear List | Click this button to clear the check-in list. |
| Check-In List | This list shows all items that have been checked back in since the list was last cleared. |
| PAGE 5 | |
| Default Loan Period | Set the default loan period here. This is the loan period that seeds the loan period on the first page. Each item can have a different loan period if desired. |
| Print Library Cards | Click this button to display the library card form that assists you in creating library cards with barcode. Library cards are printed on standard business card stock. |

| Form Item | Description |
|---|---|
| Print Library Item Labels | Click this button to display the library item label form that assists you in creating library item labels that contain a barcode.  ChurchWatch uses the Item ID to create the barcode. |
| Reservation Email Notifications | See paragraph below concerning reservations |
| Overdue Email Notifications | If an item is overdue, you can click the “Send Email Now - This One Item” button to send an email notice to the offender.  You can also click the “Send Email Now - All Items” to send notifications for all overdue items. |
| PAGE 6 | |
| Delete History | Click this button to delete history for the current library item. |
| Delete All History | Click this button to delete all history records for all library items. |
| Delete Prior To A Date | Click this button to delete all history records prior to a given date. |
| Item History Grid | The history grid shows borrow/return history for the current item. |
| PAGE 7 | |
| Scanner box | You can scan a library card here to reserve the current item.  Refer to the paragraph below concerning reservations. |
| Manual Reservation | You can use this box to manually reserve the current item.  Refer to the paragraph below concerning reservations. |
| Current Reservations | This window shows all current reservations for the currently selected library item. |
| BUTTONS | |
| Add | Click this button to add a new library item. |
| Delete | Click this button to delete the current item. |
| Find | Click this button to find an item. |
| Next | Click this button to find the next occurrence of an item matching your search criteria. |
| \|< | Click this to go to the first record in the Library Manager. |
| < | Click this to go back one item. |
| > | Click this to go forward one item. |
| >\| | Click this to go to the last record in the Library Manager. |
| Browse | Click this to view all library items in a spreadsheet format. |
| Exit | Click this to exit the Library Manager. |

Table 14-1 Library Manager Form Items

## Barcode Scanners

To use a barcode scanner in ChurchWatch and in the Library Manager, you need any scanner that has a “keyboard wedge” interface.  This is a scanner that inserts codes into your computer’s keyboard buffer, just as if you had typed on the keyboard.  The scanner needs to be able to read a Code 3 of 9 barcode font and you need to be able to control its output such that you can turn off leading and trailing characters (prefixes and suffixes).  Almost any scanner with a keyboard wedge interface will meet these requirements.

## Using Barcodes in the Library Manager

There are two ways to use barcodes in the Library Manager. The first is to create library cards for all borrowers. This can speed data entry when checking items out since the library card can be scanned on the check-out page to set the name of the borrower. A sample library card is shown in Figure 14-2. You can use standard card stock in your printer and then, if desired, laminate the card.

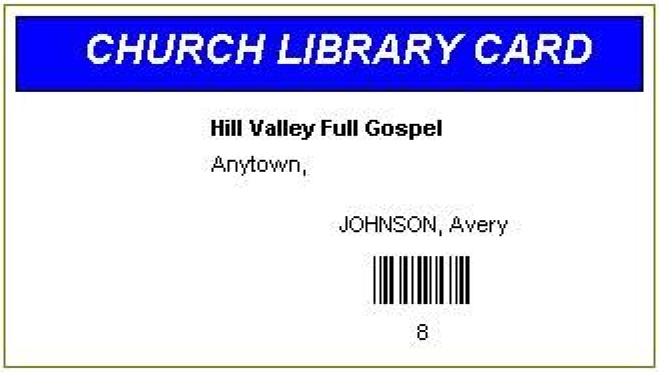



Figure 14-2 A Sample Library Card

The library card uses the ChurchWatch person id to create the unique barcode. To create a library card or set of library cards, click the PRINT LIBRARY CARDS button on the SETUP page. The following form will be displayed:

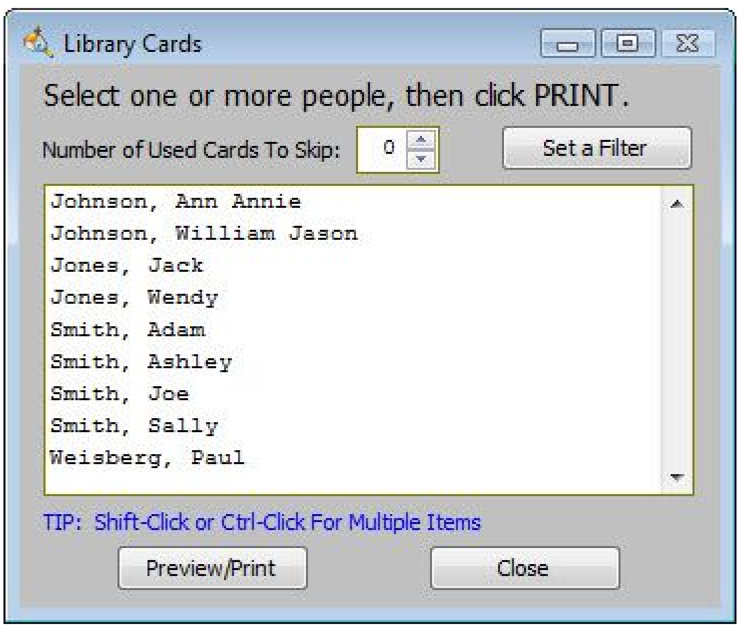



Figure 14-3 Printing Library Card(s)

From the list shown, select the person or persons you wish to create cards for. To reduce the size of the list and assist in finding specific people you can use the SET A FILTER button (refer to chapter 29).

Used cards on the first page can be skipped by entering the number of used cards to skip. This feature allows you to use card sheets that a partially used up.

Click the PREVIEW/PRINT button to view and/or print the library card(s).

Then to scan a library card, position your cursor in the scanner box field on the CHECK-OUT page and then scan the barcode on the library card. This will set the Borrower Name field.


Figure 14-4 Scanning the Library Card

The second way that barcodes can be used in the Library Manager is to place a barcode label on each library item. This can greatly reduce check-out and check-in times since each item can be scanned by barcode. A sample barcode label is shown in figure 14-5.

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1

Figure 14-5 Barcode Label

The barcode label uses the item id to create the unique barcode. To create a barcode label or set of labels, click the PRINT LIBRARY ITEM LABEL(S) button on the SETUP page. The following form will be displayed:

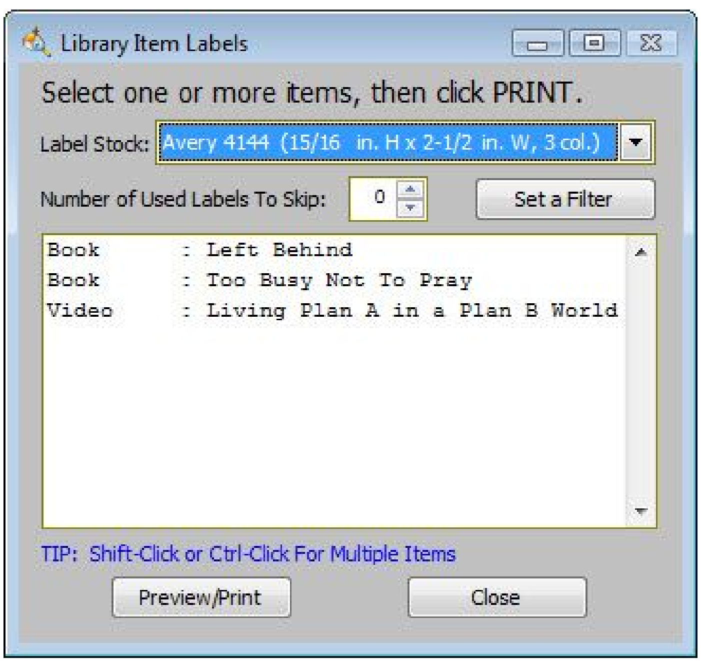



Figure 14-6 Printing Library Item Labels

From the list shown, select the library item or items you wish to create barcode labels for. To reduce the size of the list and assist in finding specific items you can use the SET A FILTER button (refer to chapter 29).

Used labels on the first page can be skipped by entering the number of used labels to skip. This feature allows you to use label sheets that a partially used up.

Click the PREVIEW/PRINT button to view and/or print the barcode label(s).

To scan a library item, position your cursor in the scanner box field on the CHECK-IN or CHECK-OUT pages and then scan the barcode on the library card. This will check in or check out the item. Be sure to set the borrower name first.

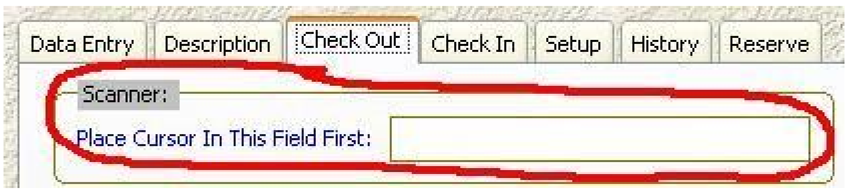



Figure 14-7 Scanning the Library Card

## Reservations

You can reserve items in the Library Manager using the RESERVE page. Begin by placing the mouse cursor in the scanner box. Scan a library card to reserve the current item. Alternatively, you can manually reserve an item by entering a person id or by clicking the "Select Person From a List" button. If you want to send an automatic email notification when the item becomes available, click the "Send Email When Item Available" check box. Finally, click the RESERVE button to manually reserve the item.

You can remove a reservation by finding the reservation in the list at the bottom of this page and then by clicking the REMOVE button.

### Email Notifications For Reserved Items

ChurchWatch can send manual or automatic email notifications for reserved items. Options are set in the SETUP page of this form. Select a notification option. You can choose one of the following:

**Auto Email** - This option sends automatic email notices without prompting you. This will be done completely transparently. A live internet connection is required at all times and ChurchWatch must be running.

**Prompt First** - This option is a semi-automatic option. ChurchWatch will prompt you first before sending the email notification. This option is useful when you have a dial-up connection and need to connect to the internet first.

**Never Auto Email** - This option turns off email notification for reserved items

# *Chapter 15 The Sermon Manager*


The Sermon Manager is a handy way to keep close track of sermon texts. Sermon text is not actually stored within ChurchWatch. Instead ChurchWatch manages the locations of the files and helps you to find the proper sermon more quickly. This way you can use your favorite word processor to edit the sermon text. ChurchWatch can even launch your word processor for you.

## Setup

The only setup required is to set the path to your favorite word processor. This is done in the Setup Manager on the USER PREFERENCES page.

## The Sermon Manager Form

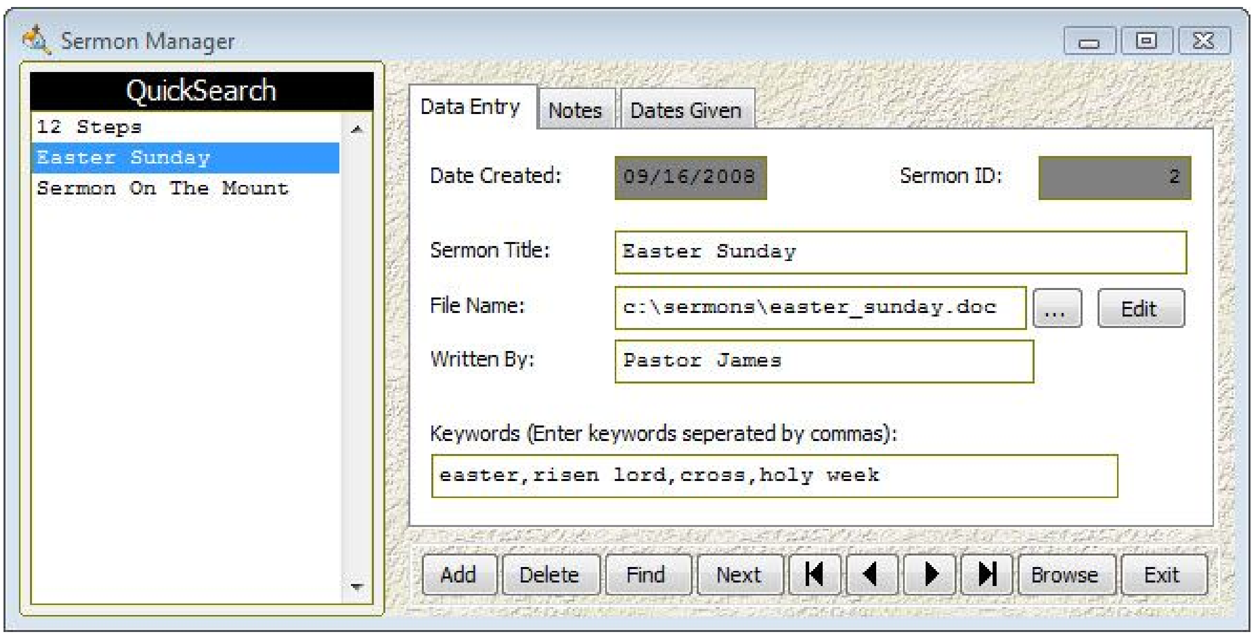



Figure 15-1 The Sermon Manager

The Sermon Manager consists of the usual QuickSearch list and 3 pages on which you can enter information about the sermon. The Sermon Manager has a sophisticated FIND command that can search by keyword, title or creation date.

| Form Item | Description |
|---|---|
| PAGE 1 | |
| Date Created | The date the sermon entry was created.  You can search on this date. |
| Sermon ID | Unique ID used internally by ChurchWatch. |
| Sermon Title | The sermon title.  Can be any text. |
| File Name | Path and file name of the sermon file.  Sermons are typically created in a word processor and stored somewhere on your hard disk.  This field informs ChurchWatch where the file is.  Choose a permanent location for your sermons before using the Sermon Manager because moving the files will break the link between the file and the Sermon Manager. |
| ... | Click this button to help find and set the sermon file. |
| Edit | Click this button to launch your word processor to edit the sermon file. |
| Written By | Name of the person or persons who wrote the sermon. |
| Keywords | You can enter a set of keywords to help you find the sermon at a later date. Keywords should be separated by commas and should contain no spaces.  For example Jesus,cross,Easter,Risen Lord |
| PAGE 2 | |
| Notes and Comments | Enter any free-form notes or comments in this text box. |
| PAGE 3 | |
| Date Given | Enter the date the sermon was given. |
| Given By | Enter the name of the person giving the sermon. |
| Down Arrow | Click this button to save the Date Given and Given By fields to the table grid. |
| Table Grid | Shows a list of dates the sermon was given and who gave it. |
| Delete | Select a table row and click this button to delete the record. |
| BUTTONS | |
| Add | Click this button to add a new sermon file. |
| Delete | Click this button to delete the current sermon file. |
| Find | Click this button to find a sermon. |
| Next | Click this button to find the next occurrence of a sermon matching your search criteria. |
| \|< | Click this to go to the first record in the Sermon Manager. |
| < | Click this to go back one sermon. |
| > | Click this to go forward one sermon. |
| >\| | Click this to go to the last record in the Sermon Manager. |
| Browse | Click this to view all sermons in a spreadsheet format. |
| Exit | Click this to exit the Sermon Manager. |

Table 15-1 Sermon Manager Form Items

***NOTE:*** *If you move the sermon files on your disk, ChurchWatch will no longer be able to find them and you will have to correct any associated database items in the Sermon Manager.*

# Chapter 16 The Registers Manager

The Registers Manager is intended mainly for Catholic churches but may be useful for other denominations as well. The purpose of the Registers Manager is to store very long-term information about individuals. There are 6 registers:

- Baptism
- Profession of Faith
- Confirmation
- Marriage
- Death
- First Communion

The Registers Manager differs from other ChurchWatch Managers in that the data is long-term and duplicated. Registers are not integrated into the other ChurchWatch data tables as is the norm throughout ChurchWatch. For example, deleting a person from your membership will not affect any data stored for that person in the Registers Manager. This should be understood to be a completely separate data module. In other words, data in the Registers remains forever until you delete it.

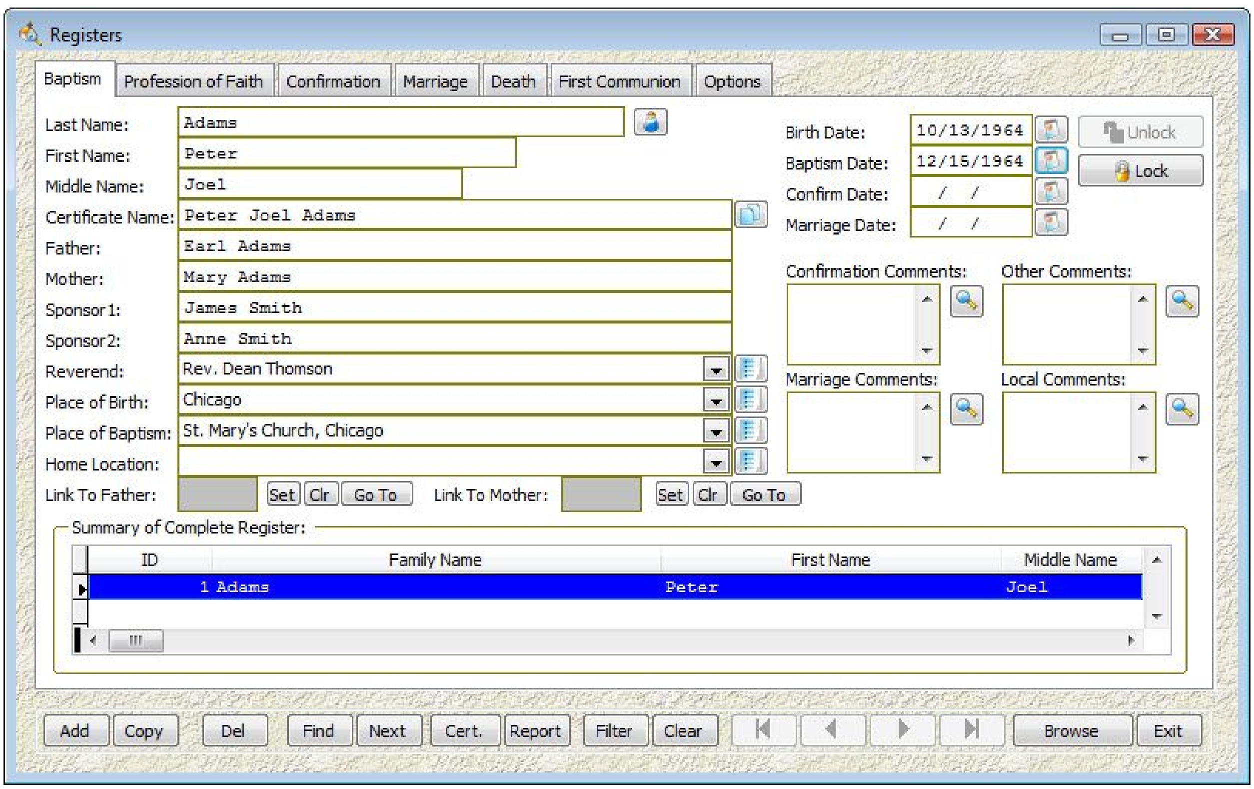


Figure 16-1 The Registers Manager

## Setting Up List Behavior

The lists in the Registers Manager can either operate strictly as pull down lists, where you must predefine the list or use the small list buttons to access the list editor. The advantage of the pull-down lists is that it keeps your lists “clean” from duplicate or double entries.

The second method is to have the lists allow direct data entry into the field in the Registers Manager. The latter, while convenient, is not recommended since you can easily create duplicate data with slightly different spellings. But the advantage of this approach is that anything you enter is automatically added to the pull-down list by ChurchWatch so you can use the pull down list in the future, should you need to enter this item again.

This setting is adjusted on the Options page of the Registers Manager. Check the “Allow direct entry of data…” checkbox to use both the pull down lists and the ability to enter directly in the field. Uncheck the checkbox to force the use of pull-down lists.

## Editing of the Registers

Click the LOCK or UNLOCK buttons to lock (protect) or unlock all detail fields for editing. The lock button is handy and important since the data is very long term and unless you have a backup it is unlikely anyone would be able to repair accidentally modified data. Lock the register once you are finished with your edits.

## Registers Manager Form Items

Each of the 6 Registers pages are organized into a details area and a summary grid. Records are selected from the summary grid near the bottom of the form. Record details will appear in the details area of the form.

| Form Item | Description |
|---|---|
| Detail Fields | Details about the selected record will appear here (records are selected in the summary grid). All editing is done in the detail fields. |
| Membership Manager Button | Click this button to fill in as many fields as possible using existing data. |
| Unlock Button | Click this button to unlock the detail fields. |
| Lock Button | Click this button to lock the detail fields. |
| List Buttons | Click the list buttons to edit available list items. |
| Zoom Buttons | Click a zoom button to expand the notes windows. |
| Summary Grid | All register records are shown in the summary grid. Click on a record here to select it for viewing or editting. |
| Add | Click the Add button to add a new registers record. |
| Del | Click the Del button to delete the currently selected record. |
| Find | Finds a record. |
| Find Next | Performs the last find again. |
| Cert. | Click the Cert. (Certificate) button to view and/or print a register certificate for the person currently selected in the summary grid. Certificates are available in both French and English. |
| Report | Click the Report button to view and/or print a register report. To reduce the records on the report, use the Filter button first. |
| Filter | Click the Filter button to create a filter and reduce the size of the summary list |
| Clear Filter | Click this button to clear any filter and display all records in the database. |
| \|< | Go to first record. |
| < | Go to previous record. |
| > | Go to next record. |
| >\| | Go to last record. |
| Browse | Browse data in spreadsheet format. |
| Exit | Exit the Registers Manager |

Table 16-1 Register Manager Form Items

# *Chapter 17 The Bible Manager*

The Bible Manager is included in ChurchWatch at no extra cost. The Bible Manager can't compete with "true" Bible Management Software but it does give you several translations and the ability to search and copy text into other Windows applications. You can also open multiple copies of the Bible Manager in order to compare translations. Several public domain bible translations are included:

- American Standard Version (1901)
- Darby
- King James Version
- Webster
- Young's Literal Translation

***Warning:*** *Each of these translations has been taken from the public domain and no attempt has been made to authenticate them. Please use them at your own risk.*

## The Bible Manager Form

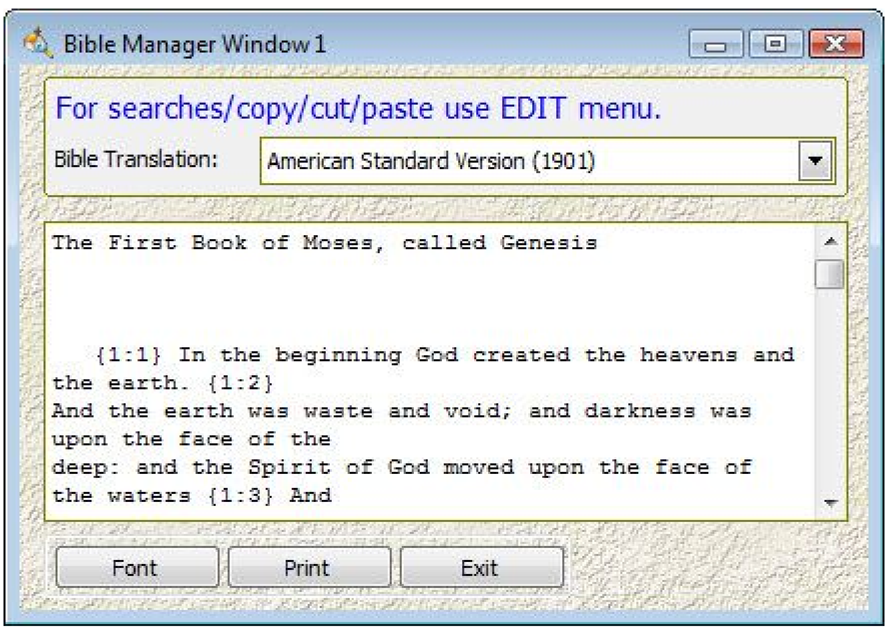



Figure 17-1 The Bible Manager

## Selecting the Translation and Changing the Format

Use the pull down list to select a translation. You can change the size of the window as desired. You can also change the font to something comfortable by clicking the FONT button. You can also open more than one copy of the Bible Manager in order to compare translations. There is no practical limit on how many Bible Manager windows you can have open at once but one per translation should suffice.

## Searching, Copy and Paste

The edit window containing the bible's text is read-only but you can click and drag your mouse to select a passage. Then use the EDIT menu at the top of the screen to select COPY (CTRL-C also works as a shortcut). You can copy and paste the text into any other Windows application such as a sermon in a word processor.

To search for a character string in the text first click inside the edit window to make sure it's active and then select the EDIT menu at the top of the screen and select FIND or just press CTRL-F as a shortcut. Then enter the text you want to find and click the FIND NEXT button.

Note that the usual Windows operations such as SHIFT-CLICK to quickly select a block of text work inside the edit window. You can also select all text by choosing EDIT-SELECT ALL from the menu at the top of the screen.

***Tip:*** *Your insertion point must be inside the edit window for search and copy operations to work. Click inside the edit window to move the insertion point.*

## Locating Books of the Bible

The Bible text is one large block of text. To find a specific book of the bible, simply search for it as per the instructions in the previous section.

## Printing Selected Text

You can send passages to the printer by first selecting the text you want to print (click and drag the mouse) and then by clicking the PRINT button.

## *Chapter 18 The Hymn Manager*


The Hymn Manager is very unique to ChurchWatch and nearly 700 hymns are included! The Hymn Manager gives you the ability to search, copy and add hymns into other Windows applications. You can also open multiple copies of the Hymn Manager. You can even add your own lyrics.

***Warning:*** *All hymns have been taken from the public domain and no attempt has been made to authenticate or proof-read them. Use them at your own risk.*

### The Hymn Manager Form

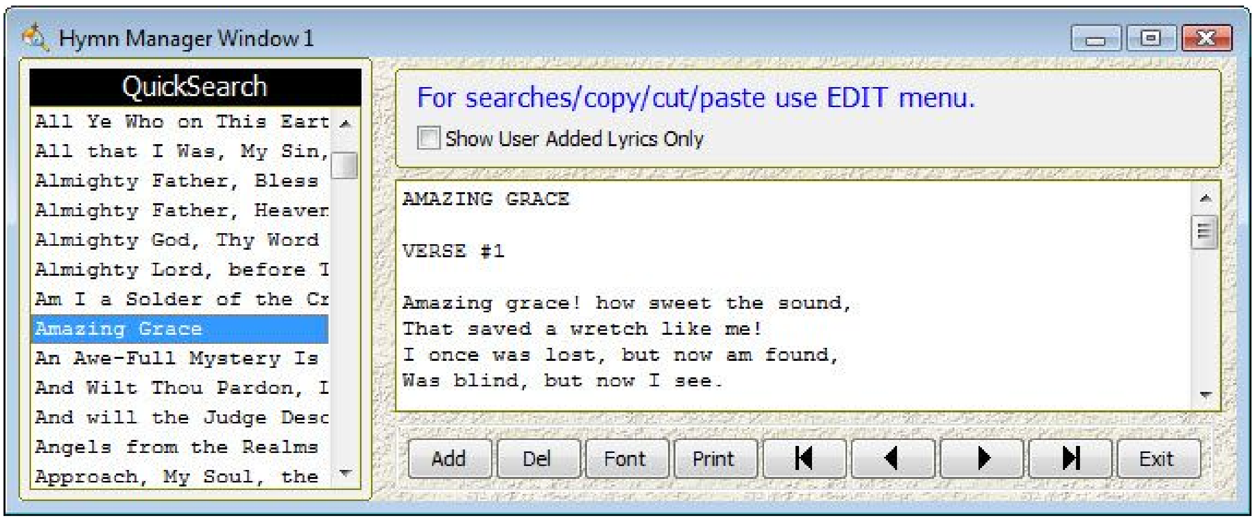



Figure 18-1 The Hymn Manager

## Form Items

Table 18-1 lists the form items on the Hymn Manager form.

<table>
<tr><th>Form Item</th><th>Description</th></tr>
<tr><td>QuickSearch List</td><td>Find and select a hymn of interest in this list.</td></tr>
<tr><td>Show User Added Lyrics Only</td><td>Check this box to show only user added lyrics in the QuickSearch.</td></tr>
<tr><td>Edit Window</td><td>This window shows the lyrics.</td></tr>
<tr><td>Add</td><td>Click this button to add a new hymn or song.</td></tr>
<tr><td>Del</td><td>Click this button to delete the current hymn or song.</td></tr>
<tr><td>Font</td><td>Click this button to change the font in the edit window.</td></tr>
<tr><td>Print</td><td>Click this button to print the selected text in the edit window.<br><br>Tip: To print an entire hymn quickly select EDIT-SELECT ALL and then click the PRINT button.</td></tr>
<tr><td>|<</td><td>Click this button to go to the first hymn.</td></tr>
<tr><td><</td><td>Click this button to go back one hymn.</td></tr>
<tr><td>></td><td>Click this button to go forward one hymn.</td></tr>
<tr><td>>|</td><td>Click this button to go to the last hymn.</td></tr>
<tr><td>Exit</td><td>Click this button to exit the Hymn Manager.</td></tr>
</table>

Table 18-1 Hymn Manager Form Items

## Searching, Copy and Paste

The edit window containing the hymn’s text is read-only but you can click and drag your mouse to select text. Then use the EDIT menu at the top of the screen to select COPY (CTRL-C also works as a shortcut). You can copy and paste the text into any other Windows application (a great way to create overheads).

To search for a character string in the text, first click inside the edit window to make sure it’s active, and then select the EDIT menu at the top of the screen and select FIND or just press CTRL-F as a shortcut. Then enter the text you want to find and click the FIND NEXT button.

Note that the usual Windows operations such as SHIFT-CLICK to quickly select a block of text work inside the edit window. You can also select all text by choosing EDIT-SELECT ALL from the menu at the top of the screen.

***Tip:*** *Your insertion point must be inside the edit window for search and copy operations to work. Click inside the edit window to set the cursor.*

# *Chapter 19 The Message Manager*


The Message Manager provides a convenient way to send inter-ChurchWatch messages from one user of ChurchWatch to another and to send internet email. When sending inter-ChurchWatch email, recipients do not need to be logged in at the time since they will be notified of new mail the next time they log in.

- Send messages to any other user of ChurchWatch or to yourself
- Send Internet email
- Notification when a new message arrives
- Easily review received, sent and saved messages

## Pre-Requisites

If you are going to use the Message Manager to send Internet email, you need to setup your email options in the SETUP form, EMAIL page.

## The Message Manager Form

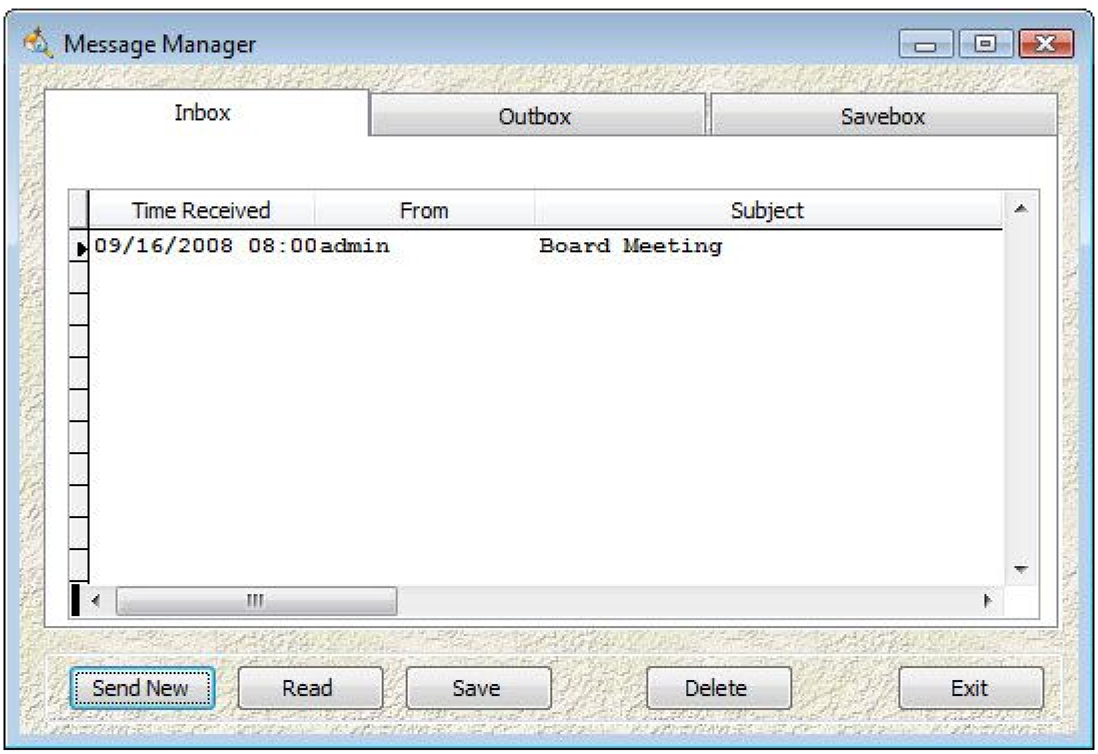



Figure 19-1 The Message Manager

The Message Manager form has 3 pages or mail boxes: received mail (Inbox), sent mail (Outbox) and saved mail (Savebox). Table 19-1 explains the buttons at the bottom of the Message Manager.

| Button | Description |
|---|---|
| Send New | Click this button to compose a new message and select the ChurchWatch users or Internet email addresses you want to send it to. Refer to the paragraph below on sending new messages. |
| Read | Click this button to read the message selected in the current mail box. You can also just double click on a message description to read it. |
| Save | Select a message in either the inbox or the outbox and then click this button to move it to your savebox. This is useful for messages you want to keep for awhile but don't want cluttering up the in and out boxes. |
| Delete | Select a message in one of the mail boxes and then click this button to delete it. |
| Exit | Click this button to exit the Message Manager. |

Table 19-1 Message Manager Buttons

## Reading Messages

To read a message double click on it, or click on it to select it and then click the READ button. The form shown in figure 19-2 will be displayed and at this point you have several options:

**Forward** Click the FORWARD button to forward a copy of this message to another ChurchWatch user.

**Reply** Click the REPLY button to send a reply message to the originator of the message.

**Reply All** Click the REPLY ALL button to send a reply message to the originator of the message and to all other users that received the original message.

**Print** Click the PRINT button to print this message.

**Exit** Click the EXIT button to exit.

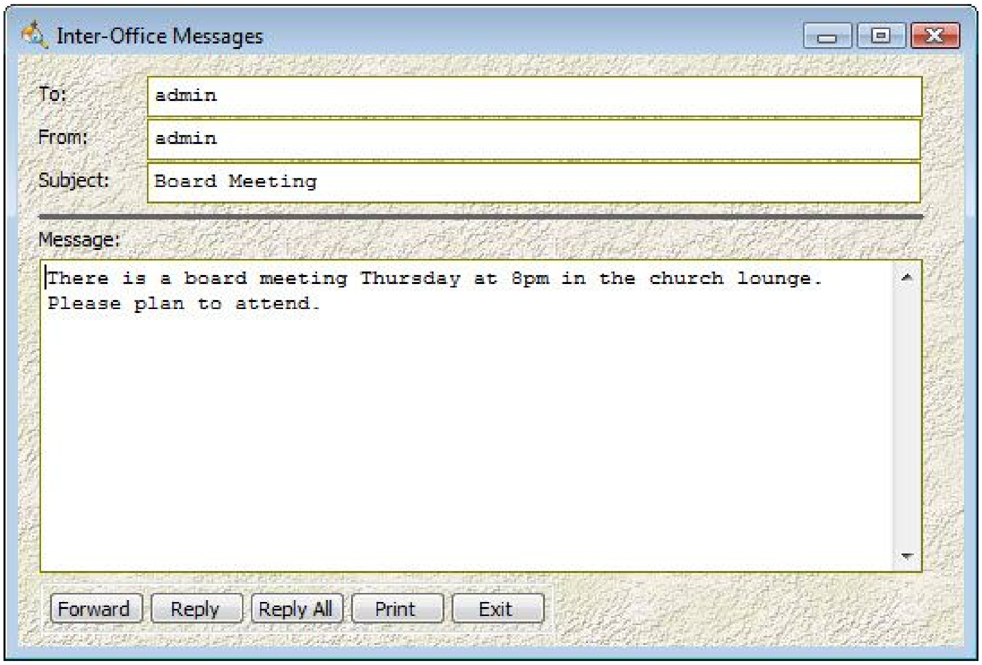



Figure 19-2 Reading a Message

## Sending a Message

To create and send a new message, click the SEND NEW button on the Message Manager form. The following form will be displayed:

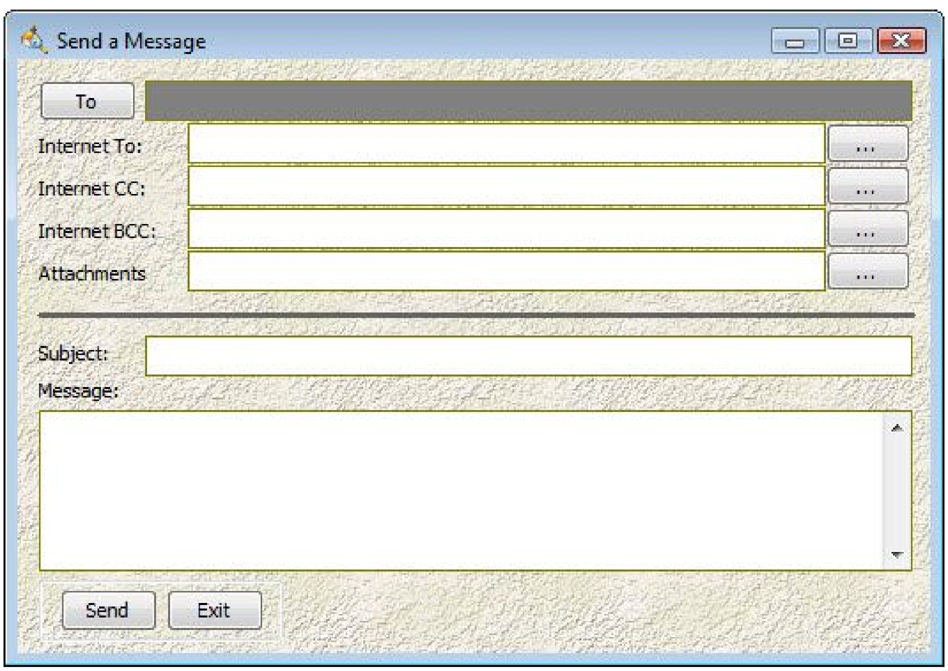



Figure 19-3 Sending a New Message

First, click the TO button to select which ChurchWatch users you are going to send the message to. You can also send internet email by entering an email address or by clicking one of the "..." browse buttons. The browse buttons will allow you to select an Internet email address from the ChurchWatch databases. If you click the TO button, the following form will be displayed:

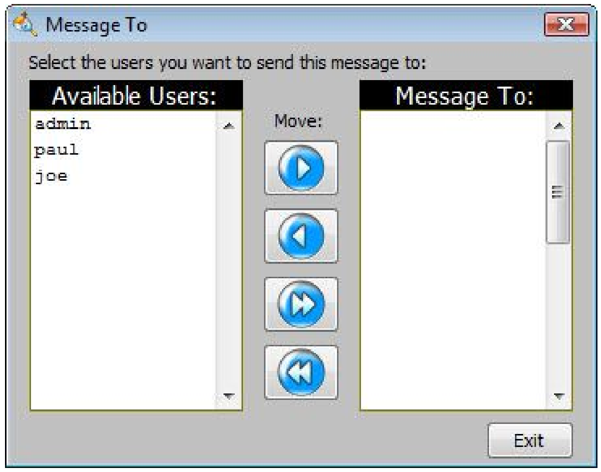



Figure 19-4 Selecting Users

All ChurchWatch users will be shown in the selection list on the left. Select one user by clicking on a name or select several users by holding the SHIFT or CTRL keys while clicking. Then click the appropriate arrow button to move the user names to the right list. The message will be sent to the users listed in the right list. Click EXIT when you are satisfied with your selections.

You can either manually enter Internet email address(es) or gather up email addresses from the ChurchWatch databases. When you click one of the "..." browse buttons for internet email, the following form will be displayed:

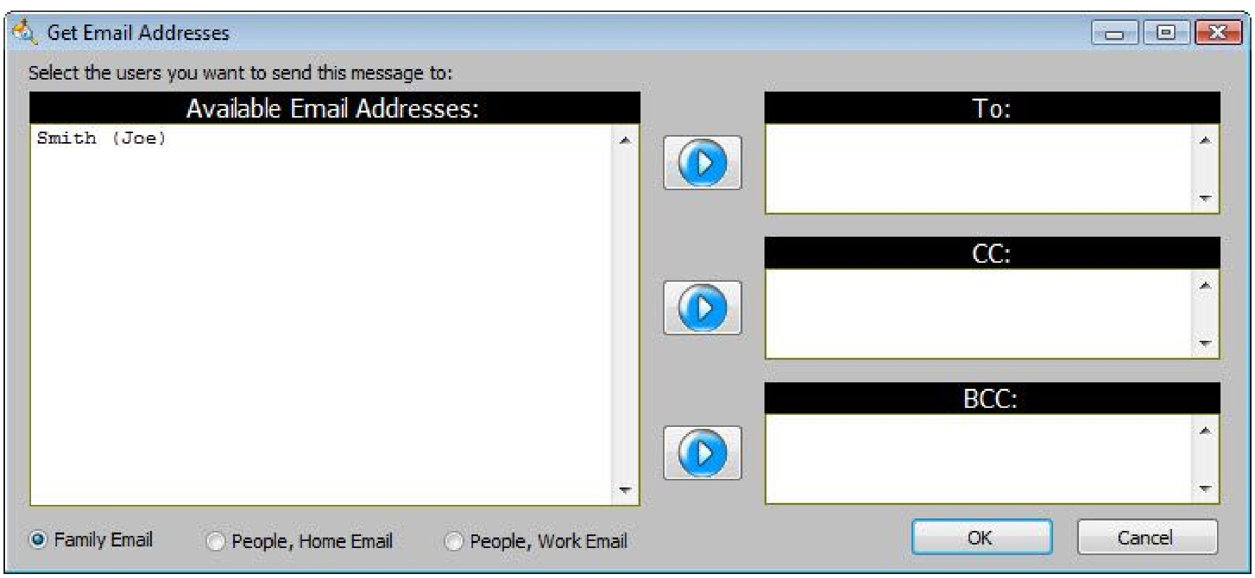
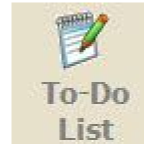



Figure 19-5 Get Email Addresses Form (for Internet Email)

Select the people or families you want to send email to.  You can filter on family email, people home email and people work email addresses using the options at the bottom of the form.  Note that if you are sending to a lot of addresses, the bulk email feature in the Mail Manager might be more suitable.

Finally, enter a subject and the body of the message and click the SEND button.

# *Chapter 20 To-Do Lists*




You can keep a simple, personal, checklist of things to do using the To-Do List. Figure 20-1 shows the To-Do list form. Click “To-Do List” from the main menu or select it from the “Forms” menu. The to-do list is not considered to be a ChurchWatch list since it is not a setup type of list and you will not find it in the “Lists” menu.

***Tip:*** *You can also create private events in the Schedule Manager which is another way to keep track of personal items. Private events have the advantage of being able to set reminders. The disadvantage is that private events do not have due dates and are not really a list.*

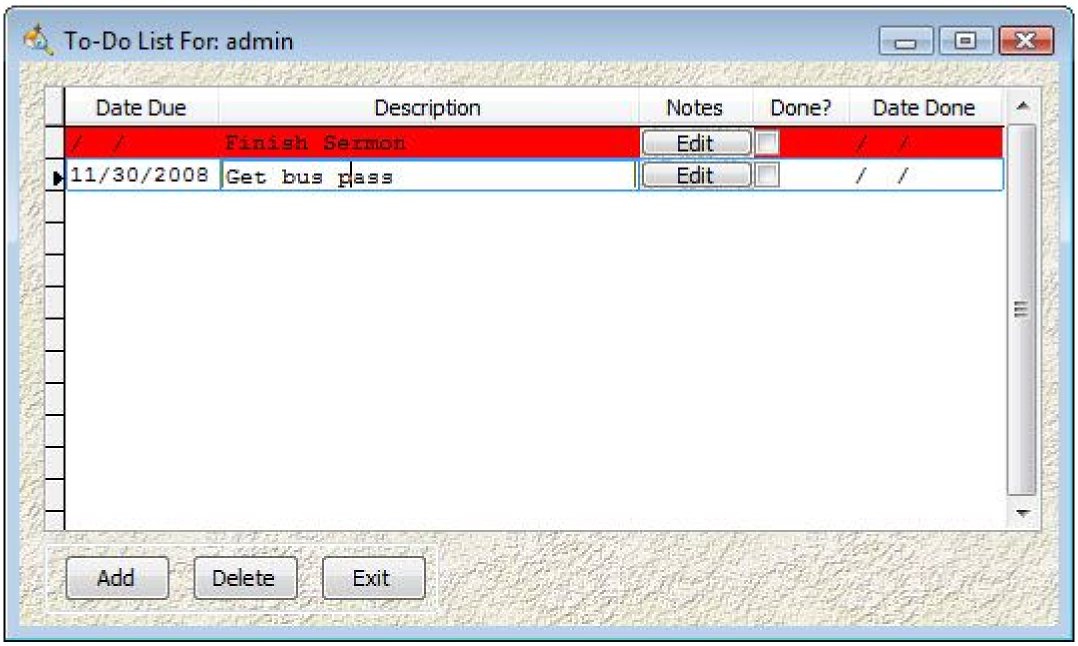


Figure 20-1 To-Do List

Each user has his/her own private and personal to-do list. Items entered here cannot be seen by other users. Click the ADD button to add an item and then fill in the blanks. Select an item and click DELETE to remove it. You can also keep free-form notes for each item by clicking the EDIT button. When the item is done check the done checkbox and the item will be struck from the list.

***Note:*** *Items shown in red are past due.*

# *Chapter 21 The Report Manager*


ChurchWatch provides over 600 pre-defined reports! These are found in the Report Manager, a handy feature for finding, modifying attributes and printing reports. In addition, you can modify any of the existing reports or create new ones. Here are some of the features of the Report Manager:

- Reports are organized into 20 different categories for easy location
- Descriptions to help find the report you need
- Save favorite reports to make locating them much faster
- Ability to modify some simple report options on the fly
- Ability to modify the existing report layouts and even the underlying software code
- Ability to create new reports
- Ability to send reports to a wide variety of output types

## Report Categories

There are 20 pre-defined report categories to choose from to make locating the report you need easier. Select a category from the list to change the list of reports you can select from.

| | |
|---|---|
| • Attendance | Reports related to attendance at events and classes |
| • Directories | Several church directory formats and phone listings |
| • Events and To-Do | Reports related to events and your to-do list |
| • Giving | Reports related to contributions and giving statistics |
| • Households | Reports related to families and the Memb. Manager |
| • People | Reports related to people details and the Memb. Mgr |
| • Phone Dialer | Reports related to the phone dialer |
| • Pledges | Reports related to pledging, pledge statistics and pledges vs. giving |
| • ChurchWatch | System manager reports |
| • Special Needs | Reports related to people's special needs |
| • Time and Talents | Reports related to people's time, talents, skills, giftings, interests etc. |
| • Sunday School | Reports related to Sunday School and classes in general |
| • Fac & Res | Reports related to facilities and resources |
| • Sermons | Reports related to the Sermon Manager |
| • Library | Reports related to the Library Manager |
| • User Defined | A list of all reports you have modified or created |
| • Favorites | All reports you have marked as favorite. |
| • Visitation | Reports related to the Visitation Manager |
| • Visitors | Reports related to the Visitor Manager |
| • Registers | Reports related to the Registers Manager |

## Getting a Complete List of Available Reports

You can print a listing of all ChurchWatch reports including descriptions by selecting the "Report Listing By Name" or "Report Listing Grouped By Type" reports under the ChurchWatch category. Note that only the ChurchWatch administrator has access to reports under the ChurchWatch category. See your administrator for help.

## Selecting a Report

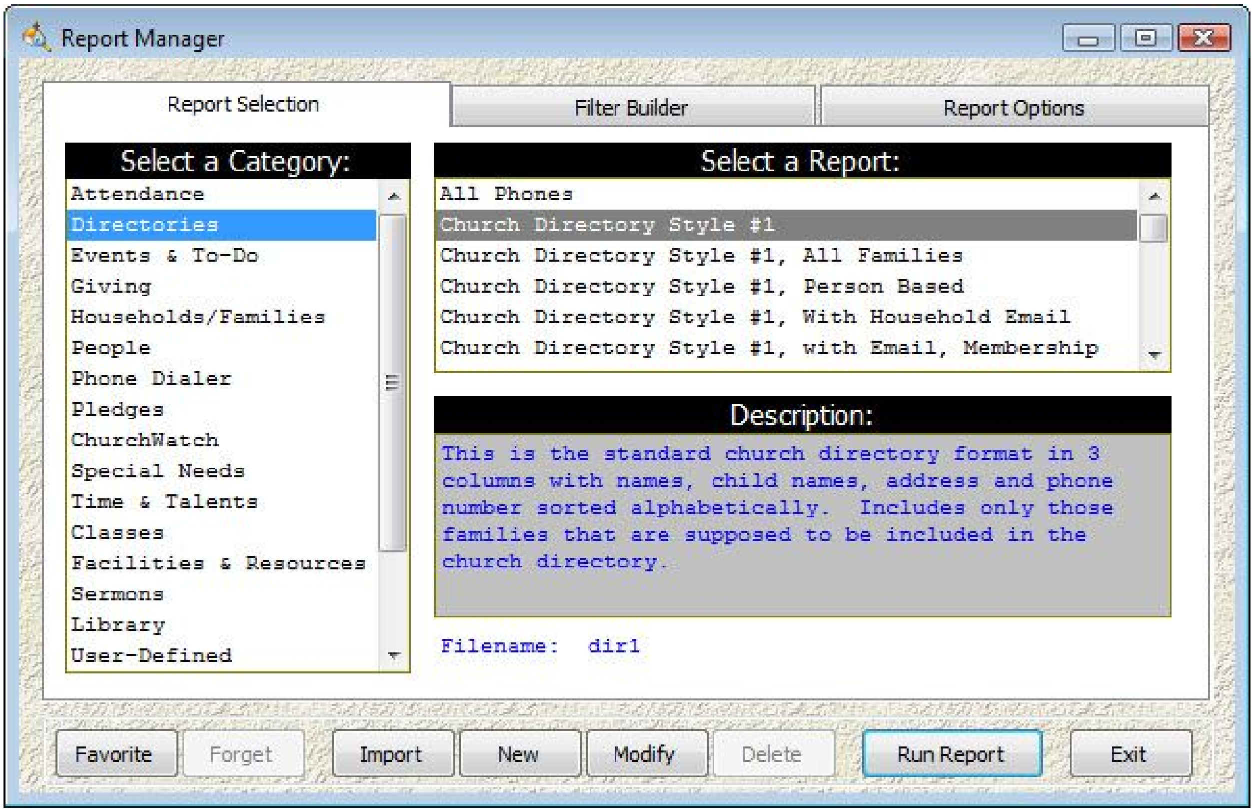


Figure 21-1 The Report Manager, Report Select Page

When the Report Manager is opened, the form shown in figure 21-1 will be displayed. This is the main page of the Report Manager and it allows you to select the report you would like to run or modify. There is a text description of each report as well as a filename to help you locate the report file should that be necessary. **If you have questions or problems with a report, always be sure to quote the filename to technical support.**

### To Select and Run a Report

Begin by selecting a report category using the list at the left side of the form. The main list of reports will change as you select a new category. Next, select a report from the list of reports and finally click the RUN REPORT button to print the report to the screen. Review each of the following paragraphs for information on how to modify some of the report options, limit the records included and change the destination from the screen to the printer.

## Data Filtering

To a limited extent, you can alter the records included on some reports using the Filter Builder page. The Filter Builder page is the second page of the Report Manager form. This can be a useful feature to greatly extend the actual number of reports you can produce. For example, suppose you want a phone listing of all men in the church. ChurchWatch does not provide such a report and could not possibly provide every combination of every report as there would be thousands of reports required. The solution is to use a data filter. In this example, you could choose the "All Phones" report under the Directories category and then create a data filter to include only men. Refer to chapter 29 for detailed information on data filtering.

Filters are not recommended for new users since you should have a good understanding of the information presented in chapter 29. You should also be aware that data filters do not work on all reports and that some experimentation will be required. To assist you, ChurchWatch only allows filters that apply to the report you have chosen.

***Tip:*** *You can produce reports for past giving years and even for membership data that was archived simply by changing the giving year on the ChurchWatch toolbar.*

To create a filter, you will need the information presented in appendix A, table formats. To create a data filter, click any of the SET FILTER buttons. You can then use the BROWSE/TEST button to see if your data filter has collected the records you were interested in. If you see lines of stars in the browse window do not be alarmed, this is quite normal and is simply showing you records that have been hidden by the filter. The CLEAR FILTER button is used to remove the data filter.

***Note:*** *The word "[Filtered]", shown on the main Report Manager page, is provided to remind you that you have a filter in effect.*

## Report Options

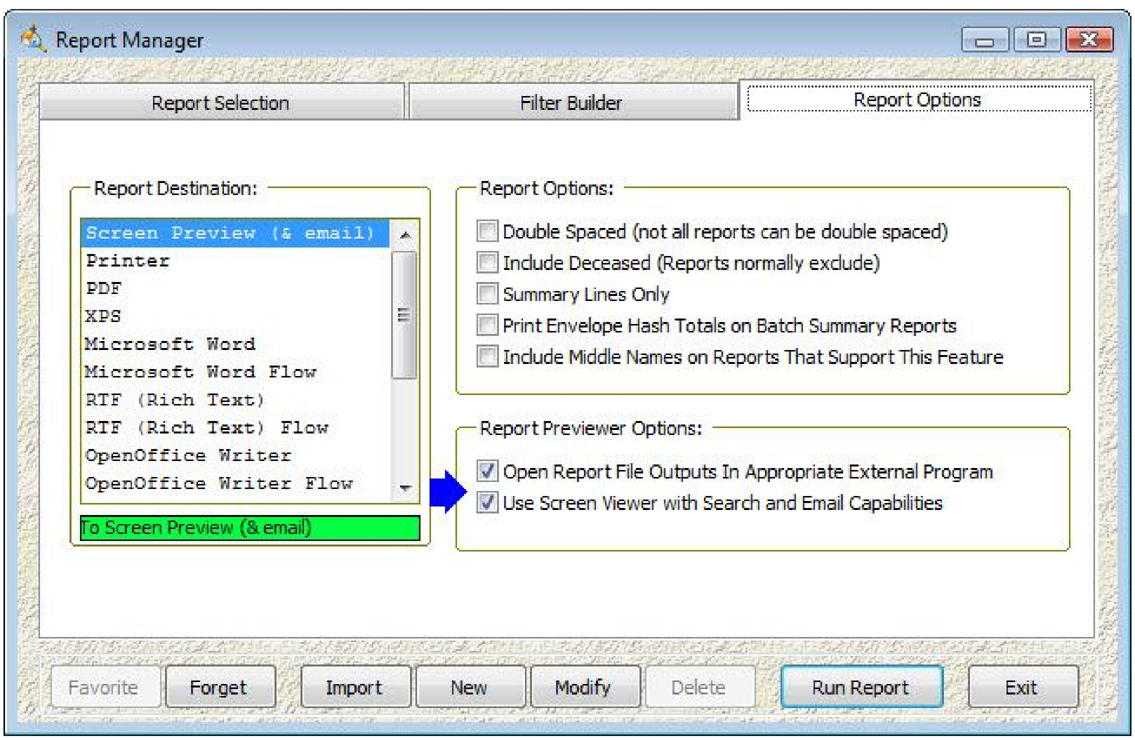



Figure 21-2 Report Manager, Options Page

The Report Options page allows you to do some simple modification of the appearance of the selected report.  Table 21-1 explains each of the report options.

| Report Option | Description |
|---|---|
| Report Destination | Choose the destination for the report.  A wide variety of options are available.  Note that the “Flow” versions of the Microsoft Word documents will sometimes create a more “editable” file.  Some experimentation with the output formats may be required. |
| Double Spaced | Check this to double space the detail lines of the report. |
| Include Deceased | ChurchWatch does not normally include the deceased in reports but you can override this feature by checking this box.<br><br>***Important:*** *On reports related to deceased people under the People category, this box MUST be checked in order to produce the report.* |
| Summary Lines Only | Check this to remove the detail lines, leaving only a summary.  This feature does not work on all reports but will work on most giving reports.  Some experimentation will be required. |
| Print Envelope Hash Totals... | Select this option to print the envelope hash total on batch summary reports.  The “envelope hash” is the total of all envelope numbers in the batch. |
| Include Middle Names on Reports That Support This Feature | Check this box to include person’s middle name. |
| Open Report File Outputs In Appropriate External Program | Check this box to launch an appropriate viewer once the report generation is complete.  For example Adobe Acrobat Reader for PDF files or Microsoft Word for Word files etc. |
| Use Report Viewer With Search and Email Capabilities | ChurchWatch includes two report viewers.  Check this box to use a report viewer with search capabilities and the ability to send email right from the on-screen preview.  You can search for text in your on-screen reports when using this viewer.  The disadvantage of this viewer is that it renders reports somewhat slower than the default report viewer. |

Table 21-1 Report Options

## Saving Favorite Reports

Sorting through 600+ reports can be difficult even when they are already organized into categories for you.  Once you find a report that is useful and that you plan to use again, you can mark it as a favorite to make finding it easier next time.  To mark a report as a favorite first select it in the main list and then click the FAVORITE button.  Note that the FAVORITE button then turns grey to indicate that this report is marked as a favorite.  These reports can then be quickly located in the Favorites category.  To remove a report from this category, go to your favorites list, select the item of interest and then click the FORGET button.

## User Defined Reports

You can modify the existing reports or create new ones.  One thing to note is that ChurchWatch does not actually allow you to modify the pre-defined reports.  Instead, a copy is made and renamed under a new file name.  This way, you can modify reports with confidence and always have the ability to go back to the original report layouts and code. There are several buttons associated with user defined reports: IMPORT, NEW, MODIFY, DELETE. Each of these functions are discussed in detail below.

**Importing a Report**

Your user defined reports can be shared with other users or sister churches by using the import feature. If you have a report you want to share (you are the exporter), first select the user defined report and take note of the file name shown on the main page of the Report Manager. Next copy or email the following 2 files: <filename>.FRT and <filename>.FRX. Replace <filename> with the actual name of your file. These two files make up the user defined report file and are found in the “ChurchWatch Data” folder in a sub folder called “Reports”. If you have a network system the files are found on your server only.

If you have received files to import (you are the importer), copy the 2 report files you received (<filename>.FRT and <filename>.FRX) to a temporary location on your hard drive. Next, follow these steps to import:

1. Click the IMPORT button in the Report Manager. You will be prompted for a .FRX file.
2. Locate the new <filename>.FRX file and select it. Click OK to continue.
3. On the form that follows, enter a descriptive report name, a description, and a security code if security protection is desired.
4. Click SAVE to complete the import.

**Modifying Existing Reports**

You can modify the existing report layouts and even the underlying code. Begin by selecting the report you want to modify. You can select a user defined report or an original ChurchWatch report. In the latter case, a copy will be made first before any modifications can be done. Click the MODIFY button to begin the modification process. The form shown in figure 21-3 will be displayed.

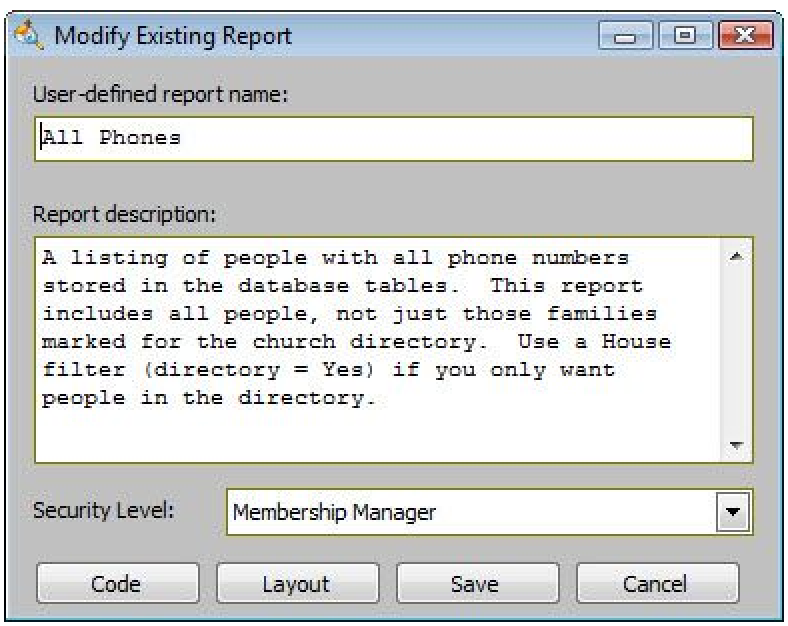



Figure 21-3 Modify Report

On the display form you have the option of changing the report name, the report description and the security level.  To change the layout of the report including font type, font size and colors click the LAYOUT button.  Figure 21-4 shows the resulting report writer and associated windows.

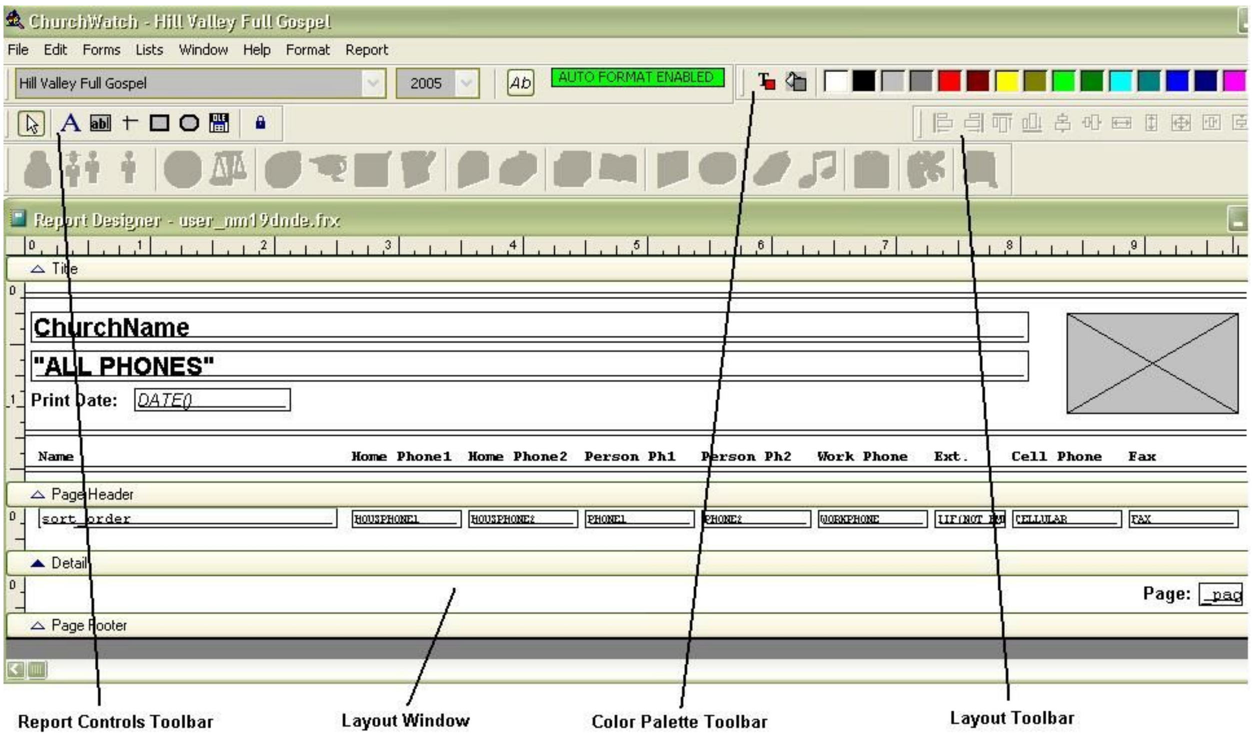



Figure 21-4  Report Designer

***NOTE:*** *The report toobars may appear undocked and floating over top of the layout window.*

In addition to the Report Designer window, two new main menu items will appear on the top of screen menu: FORMAT and REPORT.  These two menus contain items related to report modification.

ChurchWatch uses the Microsoft Visual Foxpro Report Designer.  Use of the Report Designer is a very large topic that goes well beyond the scope of this manual.  There are many excellent books available on the topic of Visual Foxpro and these should be available at a local bookstore or from www.amazon.com.  You can also review online documentation at Microsoft's website.  The Foxpro Report Designer has been drastically changed in Visual Foxpro Version 9 (used by ChurchWatch Version 5) and so a book specific to Visual Foxpro 9 is recommended.  However, there are simple changes that most people can make to reports without knowing much about Foxpro.  Table 21-2 lists some simple changes that almost anyone can make.

| Operation | How To |
|---|---|
| Resizing bands | Click on the band border and drag down or up to resize the band. Band borders have labels like “Page Header”, “Detail”, “Page Footer” etc. |
| Changing the position of fields | Click and drag the field to a new location |
| Deleting fields | Click on a field to select it, then press the DELETE key on your keyboard. |
| Resizing fields | Click on a field to select it. Several anchors (squares) will appear around the field. Click on an anchor and drag to resize the field. |
| Changing font | Click on a field to select it. On the top of screen menu, select REPORT and then FONT. Change the font in the dialog box that appears. |
| Changing field contents | To change the contents and format of a field, simply double click on it. A dialog box will open to allow you to change the table field the report field is tied to. You can also change format in this dialog. Again, we recommend any book that explains the Foxpro Report Designer. |
| Adding objects,<br>Adding fields | To add an object, select one of the Report Controls toolbar items and then click and drag to desired size on the report. |
| Aligning fields | Select the fields you want to align and then use one of the toolbar buttons on the Report Layout toolbar. |
| Changing colors | Select a field or report object, then select a color from the color palette toolbar. |

Table 21-2 Report Operations

To exit and save the report, close the Report Designer window. Churchwatch will ask if you want to save your report changes.

Advanced users can also change the software code underneath the report. Again, this is a complex operation that requires a good understanding of programming, Visual Foxpro or xbase languages and the table formats listed in Appendix A of this manual. Programming in Visual Foxpro is a topic that also goes well beyond the scope of this manual. However, with the Report Designer and access to the code there are no limits to the reports you can create when an experienced programmer is at the helm. Literally any report that White Mountain Software can create, you can also create in the Report Writer. Feel free to browse the report code to get some idea of how the reports work.

When finished with the report modifications click the SAVE button on the form shown in figure 21-3.

### Creating a New Report

Creating new reports is almost exactly the same process as modifying existing reports. The only difference is that you begin by clicking the NEW button on the Report Manager form. Typically a report consists of some code in the INIT procedure to load data and a report layout to display the results on screen or on paper. You can also add code to the DESTROY procedure in the code window if there are clean up items to take care of such as releasing public variables.

### ChurchWatch Procedure Calls

There are many procedure calls build into ChurchWatch that can assist you when designing and running new reports. For example, sometimes it is necessary to retrieve some input or a selection from the operator before proceeding with the report. Table 21-3 lists the procedure calls available to you.

| Procedure | Call Syntax and Description |
|---|---|
| GET_AREA | DO FORM GET_AREA TO nAreaID<br><br>This form allows you to retrieve an area/district ID. |
| GET_DEAD | PUBLIC public_per_id AS INTEGER<br>DO FORM GET_DEAD<br>RELEASE public_per_id<br><br>This form allows you to retrieve a person id for a deceased person. The numeric person id is returned in the public variable public_per_id. |
| GET_DTNM | DO FORM GET_DTNM TO <varname><br><br><varname> = a variable name of your choosing. The date ID will be placed into this variable<br><br>This form allows you to retrieve a date ID from the operator. The operator selects from the user defined date names. |
| GET_FAC | DO FORM GET_FAC TO <varname><br><br><varname> = a variable name of your choosing. The facility id (numeric) will be placed into this variable<br><br>This form allows you to retrieve a facility id from the operator. |
| GET_LANG | DO FORM GET_LANG TO <varname><br><br><varname> = a variable name of your choosing. Returns -1 for cancel, 1 for English, 2 for French and 3 for English/French. |
| GET_LIB | DO FORM GET_LIB TO <varname><br><br><varname> = a variable name of your choosing. The library item id (numeric) will be placed into this variable<br><br>This form allows you to retrieve a library item id from the operator. |
| GET_NEED | PUBLIC public_need_id AS INTEGER<br>DO FORM GET_NEED<br>RELEASE public_need_id<br><br>This form allows you to retrieve a need ID from the operator. The numeric need ID is returned in the public variable public_need_id. |
| GET_NUM | PUBLIC public_num AS INTEGER<br>DO FORM GET_NUM WITH <title>, <units><br>RELEASE public_num<br><br><title> = Text for the prompt on the form<br><units> = Text for the units of measure to display on the form<br><br>This form allows you to retrieve a number from the operator. The number is returned in the public variable public_num. |

| Procedure | Call Syntax and Description |
|---|---|
| GET_PRSH | DO FORM GET_PRSH TO <varname><br><br><varname> = a variable name of your choosing. The folder name of the chosen database is returned.<br><br>This form allows you to retrieve the folder name of a database selected by the operator. |
| GET_PRSH_NAME | DO FORM GET_PRSH_NAME TO <varname><br><br><varname> = a variable name of your choosing. The name of the chosen database is returned.<br><br>This form allows you to retrieve the name of a database selected by the operator. |
| GET_RECN | DO FORM GET_RECN TO <varname><br><br><varname> = a variable name of your choosing. The chosen tax receipt serial number is returned<br><br>This form allows you to retrieve a tax receipt serial number selected by the operator. |
| GET_REG | DO FORM GET_REG WITH <title> TO nRegister<br><br><title> = Text for title or blank for default title<br><nRegister> = A numeric value is returned to this variable<br><br>This form returns a numeric value represting a register. 1=Baptism, 2=Profession of Faith, 3=Confirmation, 4=Marriage, 5=Death, 6=First Communion. |
| GET_RES | DO FORM GET_RES TO <varname><br><br><varname> = a variable name of your choosing. The resource id (numeric) will be placed into this variable<br><br>This form allows you to retrieve a resource id from the operator. |
| GET_SKIL | PUBLIC public_skill AS STRING<br>DO FORM GET_SKIL<br>RELEASE public_skill<br><br>This form allows you to retrieve a time and talent name. The name of the time or talent is returned in the public variable public_skill. |
| GET_STAT | PUBLIC public_status AS STRING<br>DO FORM GET_STAT<br>RELEASE public_status<br><br>This form allows you to retrieve a marital status name. The name of the marital status is returned in the public variable public_status. |

| Procedure | Call Syntax and Description |
|---|---|
| GET_STR | PUBLIC public_str AS INTEGER<br>PUBLIC public_case_sensitive AS BOOLEAN<br>DO FORM GET_STR WITH <title><br>RELEASE public_case_sensitive<br>RELEASE public_str<br><br><title> = Text for the prompt on the form<br><br>This form allows you to retrieve a string from the operator. The string is returned in the public variable public_str. Case sensitive (.T. or .F.) is returned in public_case_sensitive. |
| GET_USER | DO FORM GET_USER TO <varname><br><br><varname> = a variable name of your choosing. The ChurchWatch user id (character) will be placed into this variable<br><br>This form allows you to retrieve a ChurchWatch user id from the operator. |
| GET2DATE | PUBLIC public_date1 AS DATE<br>PUBLIC public_date2 AS DATE<br>PUBLIC public_order_by_date AS BOOLEAN<br>DO FORM GET2DATE<br>RELEASE public_date1<br>RELEASE public_date2<br>RELEASE public_order_by_date<br><br>This form allows you to retrieve two dates from the operator. The dates are returned in the public variables public_date1 and public_date2. In addition there is a checkbox on the form for "Order By Date". The value of this checkbox (.T. or .F.) is returned in the public variable public_order_by_date. |
| GETACCT | PUBLIC public_acct AS STRING<br>DO FORM GETACCT<br>RELEASE public_acct<br><br>This form allows you to retrieve a giving account name. The name of the account is returned in the public variable public_acct. |
| GETAMOUNT | DO FORM GETAMOUNT WITH <title>,<units>,<initial value> TO <nAmount><br><br><title> = Text for the title<br><units> = Text for the units (or blank if none)<br><initial value> = Initial numeric value<br><nAmount> = The amount passed back from the form<br><br>This form retrieves a numeric value. |
| GETAWARD | PUBLIC public_award_id AS INTEGER<br>DO FORM GETAWARD<br>RELEASE public_award_id<br><br>This form allows you to retrieve a need ID from the operator. The numeric need ID is returned in the public variable public_need_id. |

| Procedure | Call Syntax and Description |
|---|---|
| GET_BATCH | DO FORM GET_BATCH TO <varname><br><br><varname> = a variable name of your choosing. The batch id (character) will be placed into this variable<br><br>This form allows you to retrieve a batch id from the operator. |
| GETCLASS | PUBLIC public_class_id AS INTEGER<br>DO FORM GETCLASS<br>RELEASE public_class_id<br><br>This form allows you to retrieve a class ID from the operator. The numeric class ID is returned in the public variable public_class_id. |
| GETCLASSOCCUR | DO FORM GETCLASSOCCUR TO <varname><br><br><varname> = a variable name of your choosing. The active_eid (occurrence id) (numeric) will be placed into this variable<br><br>This form allows you to retrieve an occurrence id for a class from the operator. |
| GETCLLIST | DO FORM GETCLLIST<br><br>This form allows you to retrieve a list of classes from the operator. It returns a cursor called "chosen_classes":<br>class_name C(100)<br>from_date T<br>class_id N(6,0)<br>SORT_ORDER C(120) |
| GETDATE | DO FORM GETDATE WITH <giving_records>,<dDatePreset>TO <varname><br><br>Where:<br><giving_records> is .T. for giving dates or .F. for pledge dates<br><dDatePreset> is the initial date<br><br><varname> = a variable name of your choosing. The date chosen.<br><br>This form allows you to retrieve a batch date from the operator. |
| GETDATE3 | PUBLIC public_date1 AS DATE<br>DO FORM GETDATE3<br>RELEASE public_date1<br><br>This form allows you to retrieve a date from the operator. The date is returned in the public variable public_date1. |
| GETENVNO | PUBLIC public_env_num AS INTEGER<br>DO FORM GETENVNO<br>RELEASE public_env_num<br><br>This form allows you to retrieve an envelope number from the operator. The numeric envelope number is returned in the public variable public_env_num. |

| Procedure | Call Syntax and Description |
| --- | --- |
| GETENVTYPE | DO FORM GETENVTYPE TO <varname><br><br><varname> = a variable name of your choosing. The type of envelope chosen.<br><br>Returns -1 for cancel, 1 for last year, 2 for this year or 3 for next year. |
| GETETYPE | DO FORM GETETYPE WITH <prompt> TO <varname><br><br>Where<br><prompt> is the prompt you want to display on the form<br><br><varname> = a variable name of your choosing. The type of event chosen.<br><br>Returns 0 for cancel, 1 for event, 2 for class or 3 for visit. |
| GETEVENT | PUBLIC public_event_id AS INTEGER<br>DO FORM GETEVENT<br>RELEASE public_event_id<br><br>This form allows you to retrieve an event id from the operator. The numeric event id is returned in the public variable public_event_id. |
| GETEVENTOCCUR | DO FORM GETEVENTOCCUR TO <varname><br><br><varname> = a variable name of your choosing. The active_eid (occurrence id) (numeric) will be placed into this variable<br><br>This form allows you to retrieve an occurrence id for an event from the operator. |
| GETEVLST | DO FORM GETEVLST<br><br>This form allows you to retrieve a list of events from the operator. It returns a cursor called “chosen_events”:<br>event_name C(100)<br>from_date T<br>event_id N(6,0)<br>SORT_ORDER C(120) |
| GETFLDR | DO FORM GETFLDR TO <varname><br><br><varname> = a variable name of your choosing. The chosen group folder name will be returned (character).<br><br>This form allows you to retrieve a group folder name from the operator. |
| GETGROUP | PUBLIC public_group AS STRING<br>DO FORM GETGROUP<br>RELEASE public_group<br><br>This form allows you to retrieve a church group name. The name of the group is returned in the public variable public_group. |

| Procedure | Call Syntax and Description |
|---|---|
| GETGTYPE | DO FORM GETGTYPE TO <varname><br><br><varname> = a variable name of your choosing. The type of giving chosen.<br><br>Returns -1 for cancel, 1 for check, 2 for cash, 3 for C.C., 4 for G-I-K, 5 for Direct Dep., 6 for P.A.R and 7 for blank. |
| GETMEMB | PUBLIC public_memb AS STRING<br>DO FORM GETMEMB<br>RELEASE public_memb<br><br>This form allows you to retrieve a membership name. The name of the membership is returned in the public variable public_memb. |
| GETMON1 | PUBLIC public_month AS INTEGER<br>DO FORM GETMON1<br>RELEASE public_month<br><br>This form allows you to retrieve a numeric month from the operator. The numeric month is returned in the public variable public_month. |
| GETMONTH | PUBLIC public_calendar_date AS DATE<br>PUBLIC public_calendar_text AS STRING<br>DO FORM GETMONTH<br>RELEASE public_calendar_date<br>RELEASE public_calendar_text<br><br>This form allows you to retrieve a date and some text from the operator. This information is normally used on church calendars. The date is returned in the public variable public_calendar_date and the text is returned in the public variable public_calendar_text. |
| GETPERID | PUBLIC public_per_id AS INTEGER<br>DO FORM GETPERID<br>RELEASE public_per_id<br><br>This form allows you to retrieve a person id from the operator. The numeric person id is returned in the public variable public_per_id. |
| GETPLEDGEACCT | PUBLIC public_acct AS INTEGER<br>DO FORM GETPLEDGEACCT<br>RELEASE public_acct<br><br>This form allows you to retrieve a pledge/giving account from the operator. The character name of the account chosen is returned in the public variable public_acct. |
| GETQUART | PUBLIC selected_quarter AS INTEGER<br>DO FORM GETQUART<br>RELEASE selected_quarter<br><br>This form allows you to retrieve a numeric date quarter (1-4) from the operator. The numeric quarter is returned in the public variable selected_quarter. |

| Procedure | Call Syntax and Description |
|---|---|
| GETSTAFF | DO FORM GETSTAFF TO <varname><br><br><varname> = a variable name of your choosing. The person id of the person chosen is returned.<br><br>This form retrieves the person id of a staff member from the operator. |
| GETTEXT | DO FORM GETTEXT WITH <prompt> TO <varname><br><br>Where<br><prompt> is the prompt you want to display on the form<br><br><varname> = a variable name of your choosing. The text entered.<br><br>Returns free form text entered by the operator. |
| GETVISITEE | DO FORM GETVISITEE TO <varname><br><br><varname> = a variable name of your choosing. The person id of the person chosen is returned.<br><br>This form retrieves the person id of a person doing a visit. |
| **OTHER FUNCTIONS:** | |
| MAKEKIDS | DO MAKEKIDS<br><br>This procedure makes a table containing a string of child names for each family. Table fields and formats are:<br>FAMILY_ID Numeric family id assigned by ChurchWatch<br>KIDS A string listing children (Sally, Tommy, Peter) |
| MAKESALU | DO MAKESALU<br><br>This procedure makes a table called SALU which contains salutation strings for all families. Table fields and formats are:<br>FAMILY_ID Numeric family id assigned by ChurchWatch<br>FAMILY_NAM Family name (Smith)<br>SALUTATION Salutation string (Smith, Joe and Helen)<br>ANNIV Couples anniversary date<br>FIRSTNAME First name of main contact of household (Joe)<br>LASTNLAST Salutation in last name last format (Mr. Joe and Mrs. Helen Smith)<br>BYTITLE Salutation with titles (Mr. and Mrs. Joe) |
| MKSALU2 | DO MKSALU2<br><br>This procedure is exactly the same as the MAKESALU procedure by MKSALU2 strips all titles from all strings. |
| PICTFAM | PICTFAM(FAMILY_ID AS INTEGER)<br><br>Returns a string representing the full path to the photo file for the given family (specified by family_id). |
| PICTPEOP | PICTPEOP(PER_ID AS INTEGER)<br><br>Returns a string representing the full path to the photo file for the given person (specified by per_id). |

| Procedure | Call Syntax and Description |
|---|---|
| PICTRES | PICTRES(RES_ID AS INTEGER)<br><br>Returns a string representing the full path to the photo file for the given resource (specified by res_id). |

Table 21-3 ChurchWatch Procedure Calls

In addition to the ChurchWatch procedure calls listed above, there are some Visual Foxpro procedure calls listed in the next chapter, Query Manager. However, for exact syntax and explanations you will need the Visual Foxpro Developer's Reference or a good book on Visual Foxpro. There are also internet web sites and newsgroups dedicated to Visual Foxpro and lots of good information is available there.

### Deleting a User Defined Report

Only user-defined reports can be deleted. Select the report you want to delete and then click the DELETE button.

## What To Do If The Report You Need Is Not Listed...

Naturally, we didn't think of every report that might be useful to you. If you need a report that is not listed and you are not comfortable or able to create your own reports, White Mountain Software can create the report for you for a small hourly fee. New reports typically take less than one hour to create so the costs can be quite reasonable for important reports you need.

Ownership of new reports remains with White Mountain Software and will be included in future versions of the software.

Contact White Mountain Software for current labor pricing.

# Chapter 22 The Mail Manager


The Mail Manager is used to quickly and easily manage church mailings including:

- form letters
- mail merges to popular word processing programs
- mailing labels in many different formats
- bulk email
- name tags for special events
- directly to envelopes
- church address mailing labels

This chapter explains how to use the Mail Manager.

## Choosing People and Families

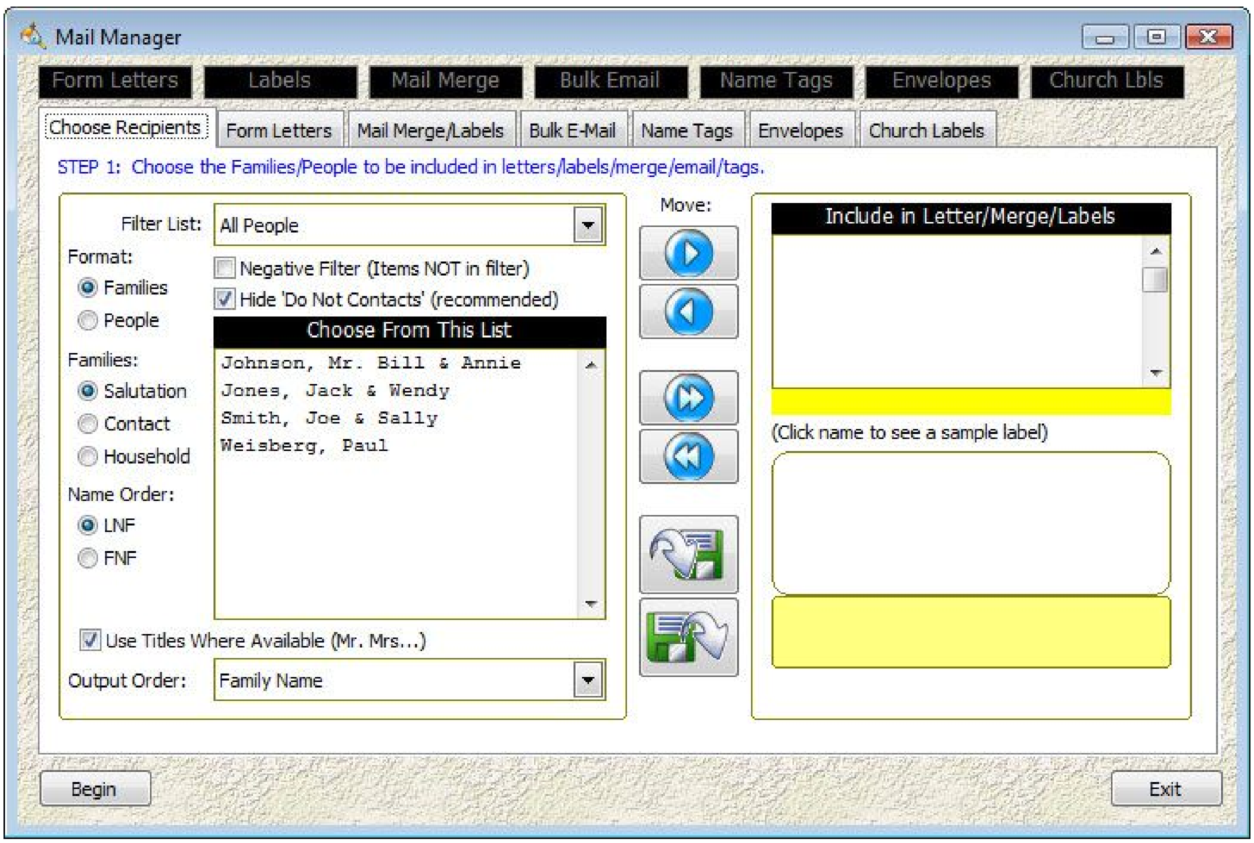



Figure 22-1 The Mail Manager

The first step before creating any mailings is to choose the families or people that will be included in the mailing. The "Choose Recipients" page of the Mail Manager is used for this purpose. Refer to figure 22-1. The main list at the left lists all the people or families that you can choose from. You can change who is listed by selecting a filter from the "Filter List" pulldown. You can also change the format of the salutation by selecting one of the format radio buttons. This is all explained in more detail in the following paragraphs.

**Filtering the People List**

Generally, the initial list of people you can choose from (all people in the database) is too large to manage effectively. Several filters are provided to help reduce the size of the list to make selection simpler. Use the “Filter List” pull down list box, the “Negative Filter” checkbox and the Hide ‘Do Not Contacts’ checkbox to select one of the following:

***NOTE:*** *When using a person-based filter AND selecting FORMAT=Families, only the main contact of each household is considered.*

| Filter Name | Description | Negative Filter |
|---|---|---|
| All People | All people in the database (no filter) | N/A |
| Directory | All families in the church directory | All families not in the church directory |
| All Males | All males | All non-males |
| All Adult Men | All males who are not marked as a child or are 18 years old or older | All adult females |
| All Male Children | All males who are marked as a child or are under 18 years old | All female children |
| All Females | All females | All males |
| All Adult Women | All females who are not marked as a child or are 18 years old or older | All adult males |
| All Female Children | All females who are marked as a child or are under 18 years old | All male children |
| All Children | All people marked as a child or under the age of 18 | All people not marked as a child or any person who is 18 years old or older |
| Main Contacts | All people marked as a ‘main contact’ | All people not marked as a ‘main contact’ |
| Spouses | All people marked as a ‘spouse’ | All people not marked as a ‘spouse’ |
| ‘Others’ | All people marked as an ‘other’ | All people not marked as an ‘other’ |
| Prospects | Anyone who is marked as a prospect | Anyone who is not marked as a prospect |
| Visitors Permitting Contact | All visitors who are permitting contact | All visitors not permitting contact |
| Families With a Mailbox # | All families who have a mailbox | All families who don’t have a mailbox |
| Specific District/Area | All families in a specific district/area | All families not in a specific district/area |
| Specific Zip/Postal Code | All families with a specific zip/postal code prefix | All families that do not have the specific zip/postal code prefix |
| Specific Group | All people in a specific group | All people not in the specific group |
| Specific Membership | All people of a specific membership level | All people not of the specific membership level |
| Specific Need | All people with a specific need | All people who do not have the specific need |
| Specific Talent | All people with a specific talent | All people who do not have a specific talent |

| Filter Name | Description | Negative Filter |
|---|---|---|
| Specific Marital Status | All people with a specific marital status | All people who do not have a specific marital status |
| Required @ an Event | All people required at an event | All people not required at the event |
| Required @ an Event But Absent | All people required at a specific event but absent | N/A |
| All People Attending an Event | All people attending a specific event | All people absent from a specific event |
| Class Enrollment | All people enrolled in a class | All people not enrolled in the class |
| Erolled in a Class But Absent | All people enrolled at a specific class but absent | N/A |
| All People Attending a Class | All people attending a specific class | All people absent from a specific class |
| All Teachers | All teachers | All non-teachers |
| Birthday Between 2 Dates | All people with a birthday between two given dates | All people who don't have a birthday in the given date range |
| Birthdate Between 2 Dates (age) | All people of specific age(s) | All people not of the specific age(s) |
| Anniversary Between 2 Dates | All people with an anniversary between two given dates | All people who do not have an anniversary between the two given dates |
| Temp. Givers | All families marked as a temporary giver | All families not marked as a temporary giver |
| All Givers | All people who have given | All people who have not given |
| All Givers Giving $x or More | All people giving $x or more | All people giving less than $x AND including non-givers |
| All Givers Giving $x or Less | All people giving something but $x or less | All people giving more than $x AND all non-givers |
| All Givers Giving to a Specific Account | All givers who gave to a specific account | All people who have not given to the specific account |
| All Givers Giving to a Specific Batch | All givers who gave in a specific batch | All people who did not give to the specific batch |
| All Givers Giving Between 2 Dates | All givers who gave something between two given dates | All people who did not give anything between two given dates |
| All Envelope Holders | All people who have an envelope # (this year's envelope #) | All people who do not have an envelope # |

| Filter Name | Description | Negative Filter |
|---|---|---|
| All Envelope Holders Who Have Given | All envelope holders who have given something this year | All envelope holders who have not given anything this year AND all non-envelope holders |
| All Envelope Holders Who Have NOT Given | All envelope holders who have not given anything this year | All envelope holders who have given something this year AND all non-envelope holders |
| Top x Givers | The top x givers | All people not in the top x giver list |
| Top x Givers to One Account | The top x givers to one account | All people not in the list of top x givers to one account |
| Home Email | Anyone who has a home email address | Anyone who does not have a home email address |
| Work Email | Anyone who has a work email address | Anyone who does not have a work email address |
| House User Checkbox #1 | All families whose user defined checkbox #1 is checked | Checkbox not checked |
| House User Checkbox #2 | All families whose user defined checkbox #2 is checked | Checkbox not checked |
| People User Checkbox #1 | All people whose user defined checkbox #1 is checked | Checkbox not checked |
| People User Checkbox #2 | All people whose user defined checkbox #2 is checked | Checkbox not checked |
| People User Checkbox #3 | All people whose user defined checkbox #3 is checked | Checkbox not checked |

Table 22-1 Mail Manager List Filters

When you select one of the above filters the left list will be refreshed and the list on the right will be cleared. Note that choosing a filter does not actually select any people for the mailing; you will still have to make the people (recipient) selections.

### Choosing a Salutation Format

ChurchWatch will automatically create a salutation based on one of the formats you choose. Table 22-2 lists all possible salutation combinations. Note that LNF stands for Last-Name-First and FNF stands for First-Name-First.

As you can see from table 22-2, you can control the formatting of names in a wide variety of ways:

| Selected Format | What would appear on a mailing label with titles defined in the Membership Manager and "Use Titles" checked | What would appear on a mailing label with titles defined in the Membership Manager and "Use Titles" NOT checked | What would appear on a mailing label with no titles defined in the Membership Manager |
|---|---|---|---|
| Families, Salutation, LNF | Smith, Mr. Joe & Mrs. Helen | Smith, Joe & Helen | Smith, Joe & Helen |
| Families, Salutation, FNF | Mr. Joe & Mrs. Helen Smith | Joe & Helen Smith | Joe & Helen Smith |
| Families, Contact, LNF | Smith, Mr. Joe | Smith, Joe | Smith, Joe |
| Families, Contact, FNF | Mr. Joe Smith | Joe Smith | Joe Smith |
| Families, Household | The Smith Family | The Smith Family | The Smith Family |
| People, LNF | Smith, Mr. Joe | Smith, Joe | Smith, Joe |
| People, FNF | Mr. Joe Smith | Joe Smith | Joe Smith |

Table 22-2 Salutation Formats

**Using Titles**

If a title (Mr, Mrs, etc) has been defined for a person, ChurchWatch will use it if you check the "Use Titles Where Available" checkbox.

**Preferred Names**

The Mail Manager uses the preferred name from the Membership Manager, if defined.

**Setting the Output Order**

You can choose the sort order for the Mail Manager's output by using the pull down list near the bottom of the main page. The default order is by family name.

**Selecting People for Mailings**

To choose a person for a mailing, click on the name in the left list and then click the right facing arrow. You may select more than one person at a time by pressing the SHIFT or CTRL keys while clicking. You can move all people in the left list to the right list by clicking the right facing double arrow. Use the left facing arrows to remove people from the mailing selection list.

***Tip:*** *To see a sample label format, click on a name from those you have selected (in the list on the right).*

***Note:*** *Deceased people cannot be included on mailings.*

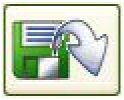
**Excluding 'Do No Contacts'**

You can mark a family as a 'do not contact' in the Membership Manager. There is a checkbox here in the Mail Manager to make sure these families and people are <u>not</u> included in mailings. The Hide 'Do Not Contacts' checkbox should remain checked at all times unless you have some specific reason for unchecking it (for example, to contact all 'do not contact' families for some reason).

**Saving and Restoring Lists**

Once you are satisfied with your include list you can save it for later recall. This feature is useful when the included list filters are insufficient or when you add additional names to a filtered list. In any case you can save the include list any time you wish and you can store an unlimited number of lists. Two buttons are included on the form for saving and restoring lists:

Click this button to save an include list. You can also rename and delete lists in the form that is displayed when you click this button.



Click this button to recall a stored list. You can also delete lists in the form that is displayed when you click this button.

When you click the save button, the following form will be displayed:

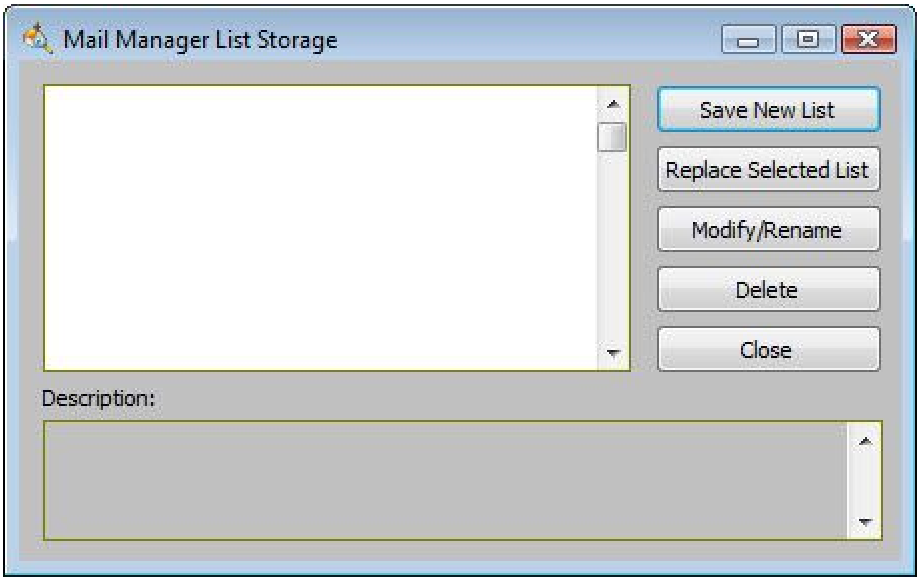



Figure 22-2 Mail Manager List Storage Form

The following table describes the Mail Manager List Storage Form:

| Form Item | Description |
|---|---|
| List Box | The list box lists all currently stored lists by name. Names prefixed with (F) indicate a family list. Names prefixed with a (P) indicate a person list. |
| Description | The description box gives a brief description of the list |
| Save New List Button | Click this button to save the current include list as a new list. You will be prompted for a name and a description. |
| Replace Selected List Button | Click this button to update or replace a list that already exists. Select the list by name in the list box and then click this button. |
| Modify/Rename Button | Click this button to rename a list or to edit the description. |
| Delete Button | Click this button to delete the selected list. |
| Close Button | Click this button to close the form. |

Table 22-3 Mail Manager List Storage Form, Form Items

To restore a saved list, click the Restore button. The following form will be displayed:

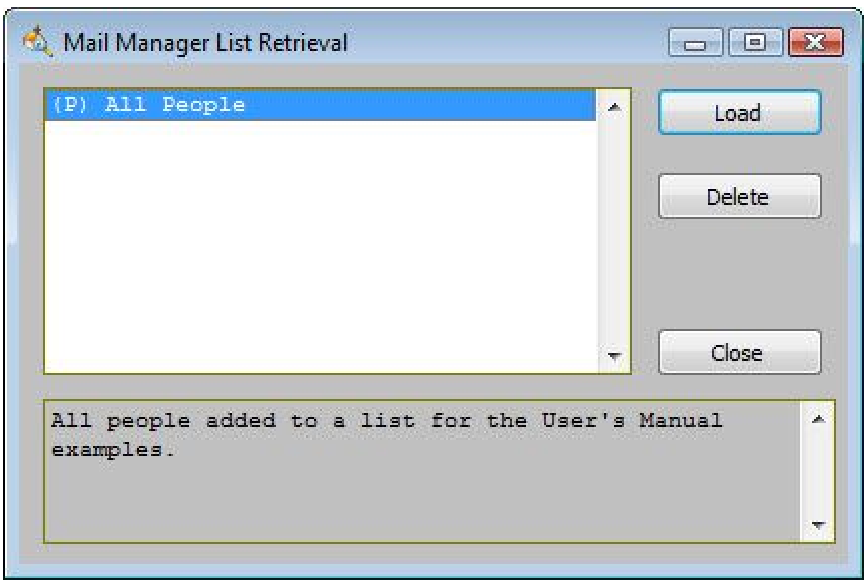



Figure 22-3 Mail Manager List Retrieval Form

Select a list from the list box and then click the LOAD button to load it. You can also delete the selected list with the DELETE button.

## Form Letters

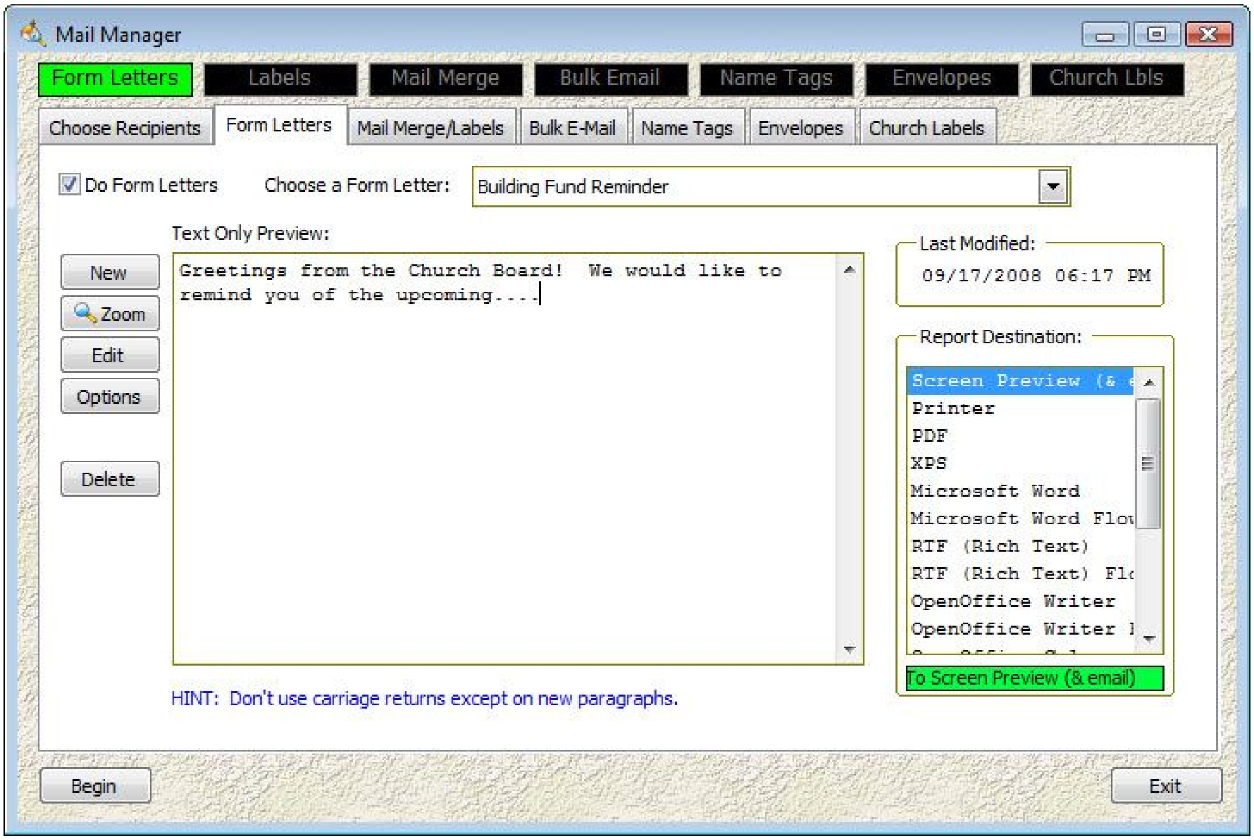


Figure 22-4 Mail Manager, Form Letters Page

Once you have chosen recipients (the include list) you can create a form letter. A copy of the form letter will be printed and addressed to each person or family you have selected. The form letters you create are stored and can be re-used at a later date. Table 22-4 explains each item on this page.

| Form Item | Description |
|---|---|
| Do Form Letters | Check this box to create a form letter. When you click the BEGIN button, the form letter(s) will be processed. |
| Choose a Form Letter | This box lists all form letters you have created. If you want to use one of these just select it here. |
| New | Click this button to create a new form letter. You will be prompted to give it a unique name. |
| Zoom | Click ZOOM to open a larger edit window for working on the form letter's text. |
| Edit | Click Edit to edit the form letter's text. |
| Options | Click options to set a form letter header and/or a digitized signature. Each of these must be a BMP, JPG or GIF graphics file. |
| Delete | Click this button to delete the selected form letter. |
| Edit Window | The Edit Window is used to edit the form letter's text. You can also click ZOOM to open a larger window. |
| Last Modified | Shows the last time you modified this form letter. |
| Report Destination | Choose a destination for the form letter. |

Table 22-4 Form Letter Page Items

Note that no formatting or font options are available on the form letter. If more formatting options are required, a mail merge using a popular Word Processor is suggested.

***Tip:*** *When editing the form letter do not use carriage returns since the printed form letter will auto-wrap words at the margins.*

## Mailing Labels

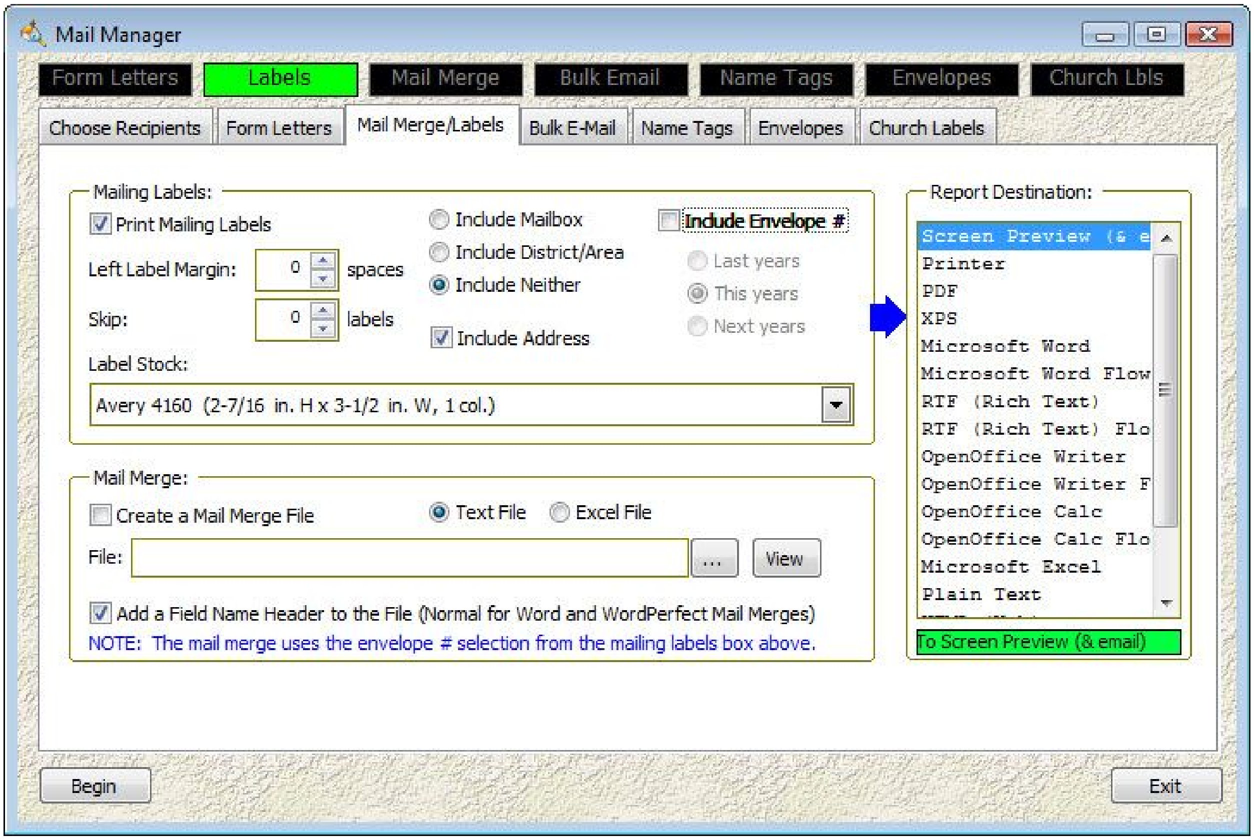



Figure 22-5 Mail Manager, Mail Merge/Labels Page

Mailing labels are created using the recipients and the salutation format you chose on the Choose Recipients page. Printing the mailing labels is as simple as this:

1. Check the “Print Mailing Labels” checkbox
2. Choose a label stock that matches your labels. If your label stock is not listed, choose one that is similar in size.
3. You can optionally choose to include an envelope # and/or mailbox # or district/area on the labels. When choosing to include envelope numbers you can even specify if you want last year’s, this year’s or next year’s envelope #’s.
4. Choose a label destination and click the BEGIN button at the bottom of the form.

You can optionally exclude the address by unchecking the Include Address checkbox. This is handy when printing labels for envelope boxes for example.

If more left margin is required you can set it before clicking the BEGIN button. This will move the text on each label the specified number of spaces to the right. In addition, if you need to skip labels to use stock that is partially used, enter the number of labels to skip. Labels are skipped on the first page only.

## Mail Merge

Near the bottom of the same page, there is an area for creating mail merge data files. When you select to create a mail merge, ChurchWatch will create either an ASCII comma-delimited text file or an Excel ™ spreadsheet file with the names and addresses of the people you have selected. ChurchWatch normally adds a header record to the file to assist WordPerfect ™ and Word ™ in the mail merge. Normally you will want to leave the “Add a Field Name Header” checkbox checked. Here is some example output:

```
First_Names,Last_Name,Salutation,Address1,Address2,City,State_or_Prov,Zip_Code,Country
"Wes & Amanda","DRURY","DRURY, Wes & Amanda","123 Any Street","","Saskatoon","SK","","CANADA"
"Milton","PETERS","PETERS, Milton","456 Apple Street","","Saskatoon","SK","","CANADA"
```

This type of format can be used by popular word processors as a mail merge data file or you can use it anywhere this type of a file would be useful. Both Microsoft Word ™ and Corel WordPerfect ™ will accept a file of this type for use in a mail merge. To create the mail merge file:

1. Click the “Create a Mail Merge File” checkbox
2. Select the type of output file: either text or Excel ™
3. Click the browse button (“...”) to set the file name for the output file. Take note of where you store the file so that you will be able to find it when it’s time to perform the mail merge with your word processor.
4. Click the BEGIN button.

**Mail Merge Using WordPerfect Versions 7 through 11 and a Text File**

This procedure will likely work with later versions of WordPerfect ™ as well.

1. Create the mail merge data file using the ChurchWatch Mail Manager. Follow the instructions above.
2. In WordPerfect, click FILE-OPEN. Enter the name of the data file you created in step 1.
3. When prompted for file type, choose ANSI (WINDOWS) Delimited Text File
4. An Import Data Form is displayed. Set up the following attributes:

   Choose Import As = Merge Data File
   Delimiter (or Field) = ,
   Record = [CR][LF]
   Encapsulated = "
   Strip = <leave blank>

5. Check off "First Record Contains Field Names"
6. Click OK.
7. The file will be created and shown in the main document window. Click FILE-SAVE AS and save your data file as <filename>.DAT. <u>Then close the window</u>.

   **To do the merge:**

8. Click TOOLS-MERGE
9. Click CREATE DOCUMENT (or FORM DOCUMENT or FORM) button. In WordPerfect 10 and 11, click FORM DOCUMENT->CREATE FORM DOCUMENT.
10. If prompted, Click "Use File in Active Window" to use existing document  or "New Document Window" to create a new document
11. Click "Associate Data File" and set the file to the file you saved in step 7. Click OK.
12. Near the top left corner of the screen click on Insert Field to insert a field from your merge data file. Continue this process to create your merge document template. Be sure to save your template document when done.
13. When done, click the MERGE button on the toolbar. In the form that apears click MERGE to complete the merge. This will create a new document window with all the merges.

***TIP:*** *For up to date mail merge instructions see your WordPerfect User's Manual or the built-in help.*

### Mail Merge Using Microsoft Word 2007

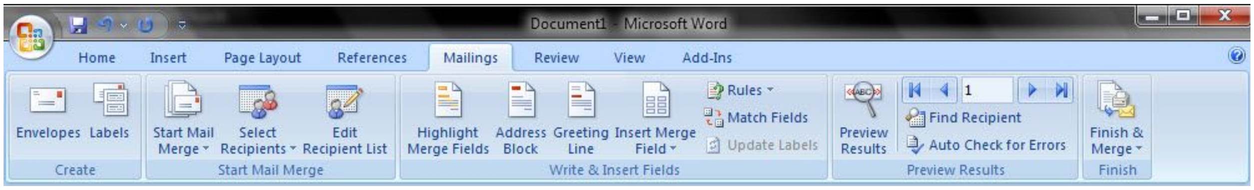



Figure 22-6  Word 2007 Mailings Tab on the Toolbar

1. Create a mail merge data file using the ChurchWatch Mail Manager.  Follow the instructions found earlier in this chapter.
2. In Word, click the Mailings tab on the toolbar.
3. Click the Start Mail Merge button on the toolbar, and then choose letters or whatever you are creating.
4. Click the Select Recipients button, and then choose Use Existing List.
5. In the window that opens, change the data source to either Text Files or Excel Files depending on what type of file you created in step 1.
6. Locate your merge file from step 1, select it and then click the Open button.
7. If using a text file, in the ‘Header Record Delimiters’ window that opens, change the field delimiter to comma and the record delimiter to (enter).  Then click OK.
8. If you want to see the recipient list that was imported, click the Edit Recipient List on the toolbar. In this window you can also include or exclude recipients by clicking the checkbox beside each name.
9. If you have not already created the merge document you may do so now using the Address Block, Greeting Line and Insert Merge File buttons on the Word toolbar.
10. To perform the merge, click the Finish and Merge button on the Word toolbar.

### Mail Merge Using Microsoft Word 2002 and 2003 and a Text File

11. Create a mail merge data file using the ChurchWatch Mail Manager.  Follow the instructions found earlier in this chapter.
12. In Word, launch the mail merge wizard by selecting Tools->Letters and Mailings->Mail Merge Wizard. The Wizard will appear in a pane on the right.
13. Follow the Wizard instructions, clicking NEXT at each step.
14. On the "Select Recipients" page, select "use an existing list" and then click the BROWSE button. Locate the file that was exported from ChurchWatch in step 1 and select it.
15. In the dialog box that appears, you can choose the records you want to keep or just click OK to use all records in the file.
16. Compose your letter or fax.  To insert merge fields into your document, click the "more items" selection in the merge wizard (it will be showing in the pane at the right).  Then in the dialog box that appears, select "Database Fields" and then select the field from the ChurchWatch export in the list and then click the INSERT button.  Finish your letter and then click NEXT to preview your merge.

### Mail Merge Using Microsoft Word 97 and a Text File

1. Create a mail merge data file using the ChurchWatch Mail Manager. Follow the instructions found earlier in this chapter.
2. In Word, click on TOOLS-MAIL MERGE
3. Under "Main Document" click CREATE and then choose what you wish to create (form letter, labels etc)
4. Click Active Window to use existing document or New Main Document to create a new document
5. Under "Data Source" click GET DATA. Choose OPEN DATA SOURCE.
6. Choose the merge output data file you created in step 1.
7. You may get a message at this point and if so click on Edit Main Document
8. Near the top left corner of the screen click on Insert Merge Field to insert a field from the merge data file. Continue this process to create your merge document template.
9. When done, Click on TOOLS-MAIL MERGE again. Under item #3 click the merge button to perform the merge.
10. Follow the Word instructions to complete the merge to a new document.

***TIP:*** *For up to date mail merge instructions, refer to your Word User's Manual or built-in help.*

### Mail Merge Using Other Word Processors

It is likely possible to do mail merges in other word processing packages such as OpenOffice using the same mail merge data file that ChurchWatch produces.

## Bulk Email

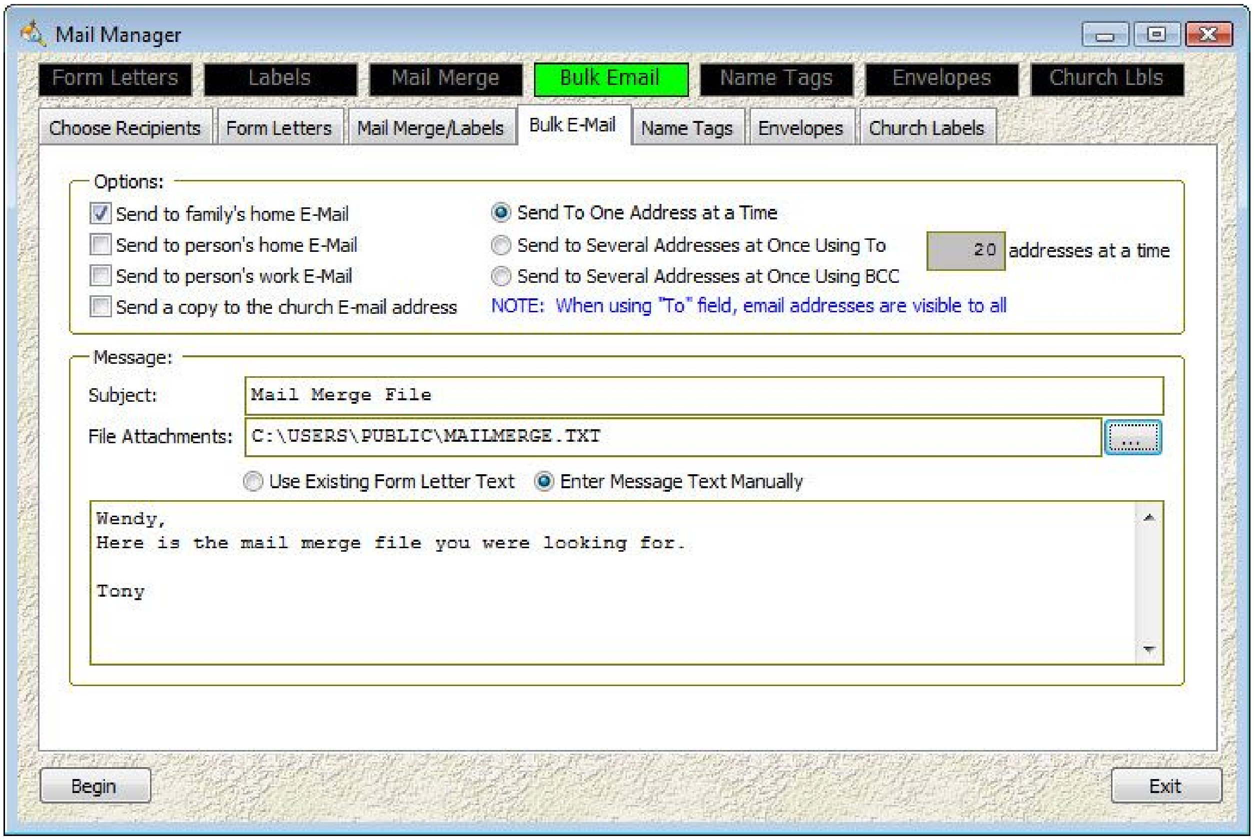


Figure 22-7 Mail Manager, Bulk Email Page

This page allows you to send email to the people or families you have selected on the Choose Recipients page, provided that each person or family has an email address entered.

You must have setup your email selections in the SETUP-EMAIL page before using bulk email.

Begin by selecting one or more of the send-to options in the top left corner of this page. Next, decide if you want to send one email at a time or send to several people at once. You can also choose between CC (carbon-copy) and BCC (blind-carbon-copy). BCC is recommended if you don't want anyone to see everyone else's email address. You can specify the number of addresses to "batch up" in each send using the XX addresses at a time setup to the right of this option list. This is likely necessary because most Internet Service Providers will view a large recipient list in an email as spam or junk email. We recommend 20 addresses or less. Your Internet Service Provider may require even less.

Next, enter a subject for the email. A subject should always be entered or some Internet servers may reject the email as junk mail. If desired, you can even include file attachments. Click the "..." button to browse for a file or files to attach to the email.

Now you need a message body. You can two choices. You can use the text body of an existing form letter or you can enter text manually on this page. Choose one of these two options. If you chose to enter the text manually on this page, enter your message body in the box provided at the bottom of this page.

Finally, click the BEGIN button to send the emails. If you have chosen MAPI based email in the Setup Manager, your email program will have copies of the email sends in your outbox. For this reason, we highly recommend using SMTP based email when using the bulk email feature.

### Troubleshooting Email

Problems sending email are usually related to not having a MAPI enabled email client or by not entering correct user and password information when using SMTP email. If you are using MAPI, try this simple test: Click on the Windows START button and choose RUN. Enter "mailto:admin@churchwatch.com" and click OK. Your email client should start. If using SMTP email and you are not sure of your user name and/or password or you are not sure if SMTP Authentication is in use, contact your Internet Service Provider.

In addition, any virus checkers, firewalls or security features can also adversely affect your ability to send email.

***Important: Especially when using MAPI, ChurchWatch has no control of the email process once you click the BEGIN button. If an error occurs, a message will be displayed explaining the error and ChurchWatch may shutdown. If this occurs, double check that you are connected to the internet and make sure you have a MAPI-aware email program. When using SMTP, much better error reporting is possible. For this reason we highly recommend using SMTP email protocol when sending Bulk Email.***

## Name Tags

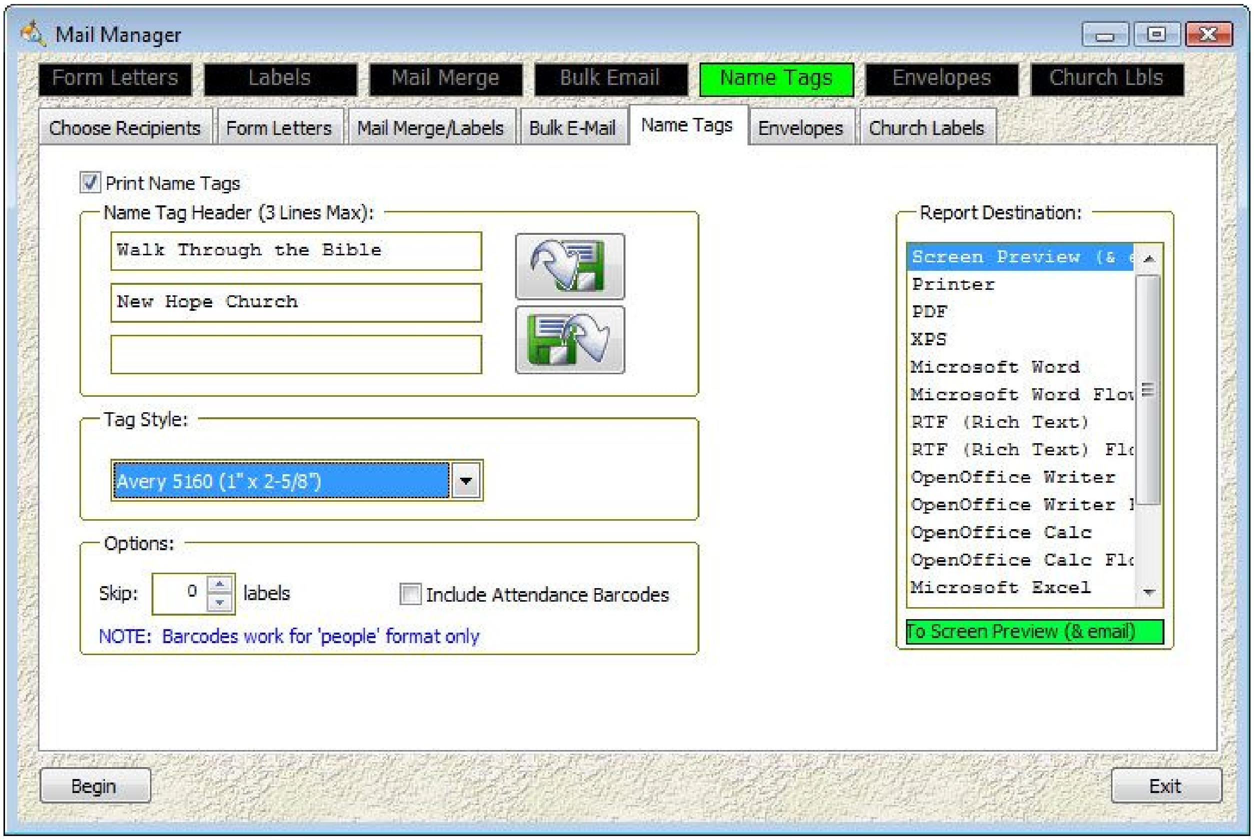



Figure 22-8 Mail Manager, Name Tags Page

While not really a mail function, name tag generation fits nicely into the Mail Manager since it also uses the recipients you selected on the Choose Recipients page.

ChurchWatch prints name tag sizes to fit standard name tag stock you can purchase at any stationary store.

**To create name tags:**

1. Check the “Print Name Tags” checkbox.
2. Enter up to three lines of text to be printed at the top of each name tag.
3. Select the tag stock you have. If your stock is not listed, choose one that is similar in size.
4. Select a tag destination. Print to screen first to preview the results.
5. Finally click the BEGIN button.

***Tip:*** *When choosing the name tag style, the Avery formats usually work better.*

***Tip:*** *For all operations in the Mail Manager, always print to screen first to preview the results before committing to the printer.*

**Name Tag Options**

There are several options on the name tag page. You can save and restore name tag formats by clicking either the save or restore buttons respectively.

You can skip used labels to finish using up a sheet by entering the number of labels to skip. Labels are always skipped at the beginning of the report.

If you selected people instead of families you can also include a barcode font on each name tag, suitable for use in the Attendance Manager, by checking the “Include Attendance Barcodes”.

## Envelopes

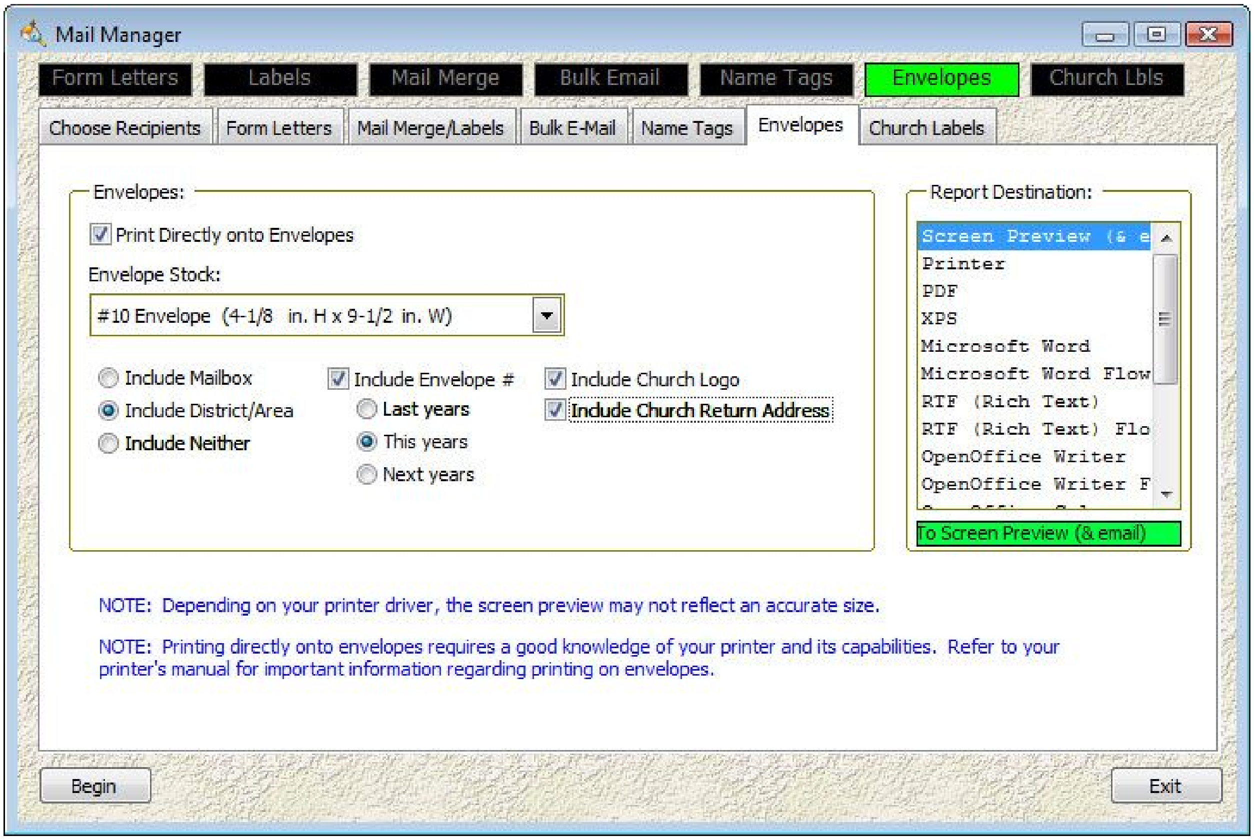



Figure 22-9 Mail Manager, Envelopes Page

You can print directly onto envelopes using the Envelopes page.

**To print to envelopes:**

1. Check the “Print Directly onto Envelopes” checkbox.
2. Choose the type of envelopes you are using.
3. Set the various options to achieve the desired results.
4. Select a destination. Print to screen first to preview the results.
5. Load your printer with envelopes in the correct orientation. Depending on your specific printer, printing to envelopes can be a complex and difficult task. Refer to your printer’s documentation, understand the limitations of your printer, and always do a test print with one (1) recipient before continuing.
6. Finally click the BEGIN button to print the envelopes.

## Church Labels

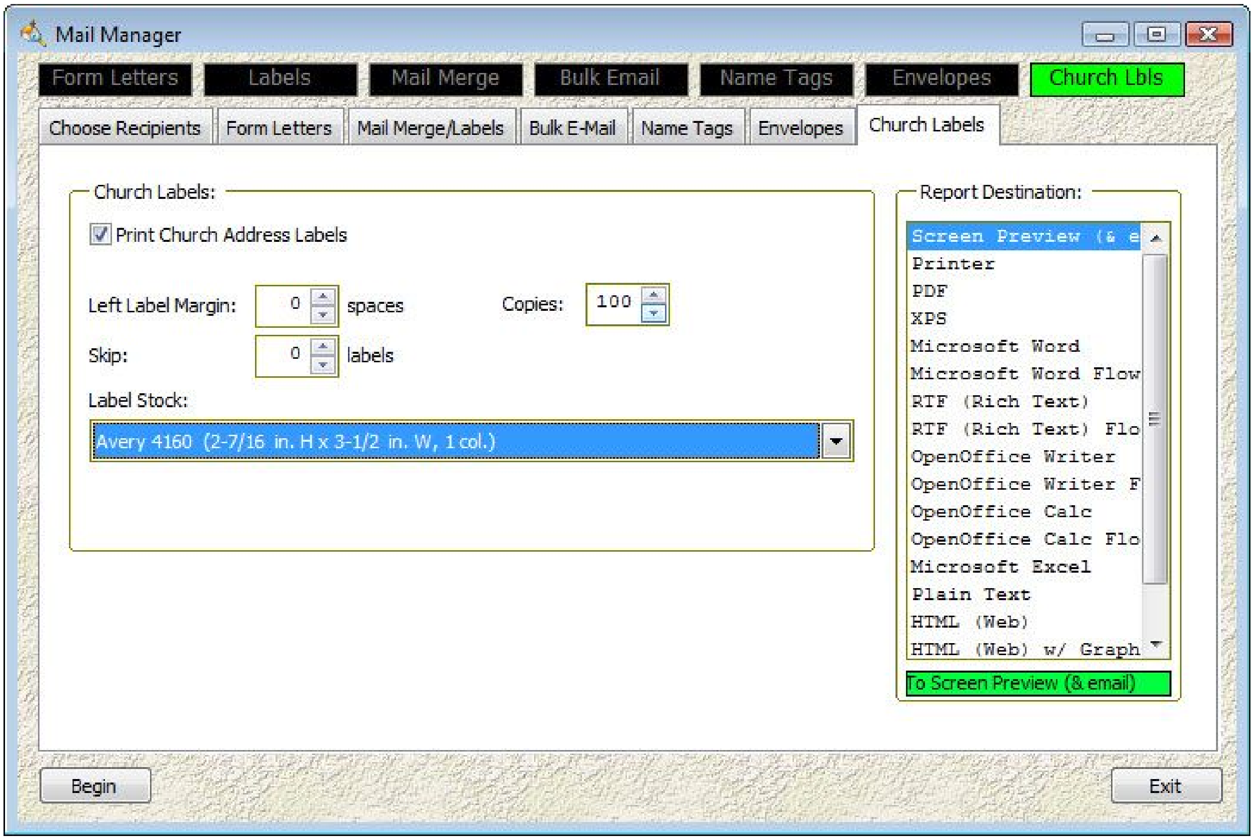


Figure 22-10 Mail Manager, Church Labels Page

This page allows you to print mailing labels with the Church's return address. This page does not use the recipients list and so there is no need to select any. You can print as many labels as is desired.

**To print church labels:**

1. Check the "Print Church Address Labels" checkbox.
2. Set the number of copies and any other options. You can skip used labels (at the top of a page) by setting the number of labels to skip.
3. Choose the label stock.
4. Select a destination. Print to screen first to preview the results.
5. Finally click the BEGIN button to print the labels.

# *Chapter 23 The Query Manager and SQL Queries*


The power and speed of the Query Manager to retrieve data from your ChurchWatch databases is rather astounding. Queries are a way to specify, in a general way, what you want to retrieve from the database tables. Virtually any combination of data can be retrieved making this a great way to retrieve data that is not covered in the existing reports and to create interesting reports and statistics.

The Query Manager is included for advanced users who understand the Structured Query Language (SQL) used by most relational databases. The Query Manager is not intended for new users or those not comfortable with SQL. However, the language is fairly simple to learn and understand so if you like a challenge, try some experimentation in the Query Manager. You cannot damage any data by using the Query Manager so experimentation is safe.

SQL is a broad topic that covers entire books. If you would like to learn more about SQL, your local bookstore will have many books related to this subject. This chapter covers SQL only in minimal detail. A book covering Microsoft Visual Foxpro would also be useful since SQL queries can be combined with Visual Foxpro functions as will be discussed later in this chapter.

## The Query Manager Form

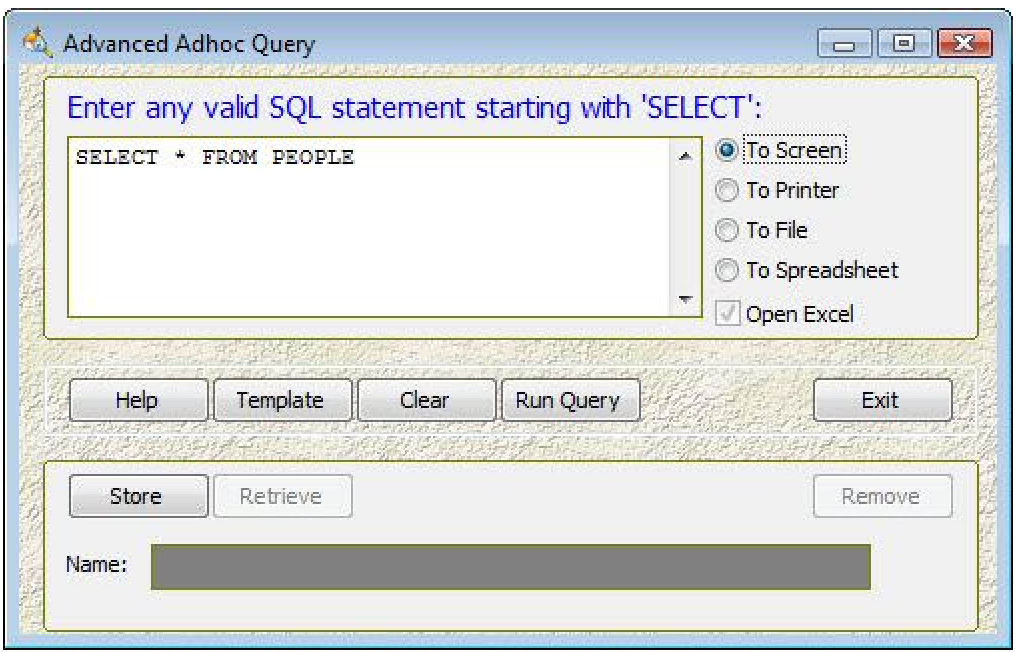



Figure 23-1 The Query Manager

The Query Manager form is fairly straight forward. There is an edit window to type queries into, buttons for running and clearing the query and buttons related to saving, restoring and deleting queries.

In addition several report destinations can be selected. Note that if you chose the FILE destination ChurchWatch will create an ASCII text file (.TXT) with your query results. Text files are handy for cutting and pasting the query results into another Windows ™ application.

Table 23-1 explains each of the buttons on the form:

| Button | Description |
|---|---|
| Help | Click this to view the ChurchWatch table and field definitions. You will need this detailed information to formulate a query. You can also refer to Appendix A of this manual. |
| Template | Click this button to paste a helpful query template into the edit window. |
| Clear | Click this button to clear the edit window. |
| Run Query | Click this button to run your query. |
| Exit | Click this button to exit the Query Manager. |
| Store | Click this button to save your query for use at a later date. |
| Retrieve | Click this button to retrieve a saved query. |
| Remove | Click this button to delete a saved query. |

Table 23-1 Query Manager Buttons

## Running a Query

To run a query, simply type the query command into the edit window and then click the RUN QUERY button.

### Runaway Queries

If you make a mistake in your query you can cause a query that “runs away” and creates MASSIVE amounts of data. You can, in fact, run out of disk space if this occurs. ChurchWatch uses an extremely fast database engine and most queries will complete and be displayed as quick as you can click the RUN QUERY button. If your query runs for more than a few seconds you may be able to cancel it by pressing the ESC key, although ChurchWatch will likely shutdown.

## Tables With Protected Access

The Query Manager respects the administrator set security levels for each user. You cannot query data from tables you are not permitted access to. Contact your ChurchWatch administrator if you need increased access rights.

## Storing and Retrieving Queries

Once you have your query working properly you can save it for later use. You can also retrieve or delete saved queries using the buttons already explained. When you click on the STORE button, the form shown in figure 23-2 is displayed. Enter a descriptive name for the query and a description of what it does. Finally click the SAVE button.

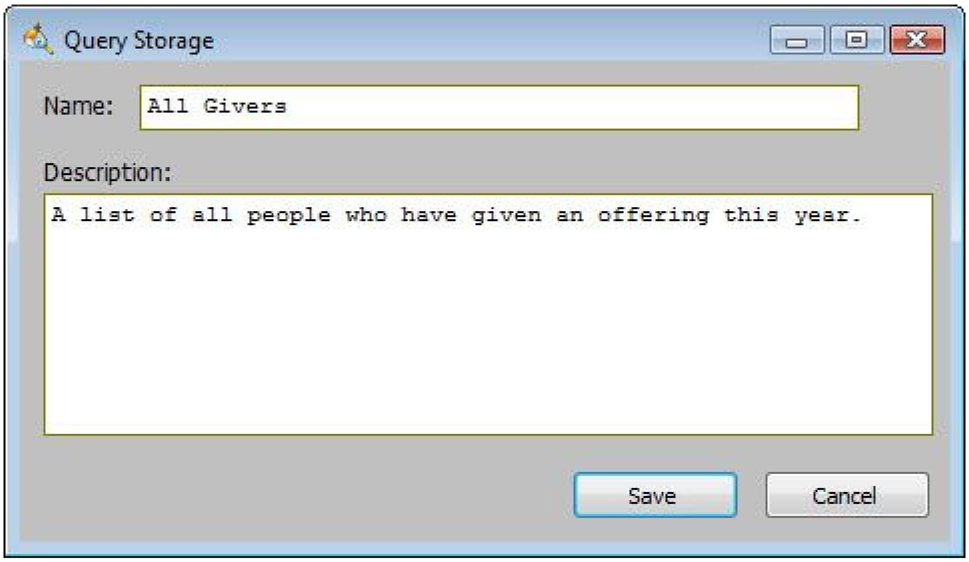



Figure 23-2 Storing a Query

## SQL Queries

So what is SQL anyway and what does a query look like? SQL stands for Structured Query Language and is a standard query language used in most relational databases. The details of SQL are beyond the scope of this user's manual but the basic syntax of a query is as follows:

SELECT <fields> FROM <tables> WHERE <conditions> <options>

The query begins with the "SELECT" keyword followed by the fields you want to retrieve from the database tables. You will need to refer to Appendix A of this manual to get the exact field names for use in the query. You can also use the asterisk character ('*') as a wildcard to indicate "retrieve all fields".

Example:

```
SELECT * FROM PEOPLE        (Retrieves all fields from PEOPLE table)
```

Now, using Appendix A of this manual, you can add specific field names:

Example:

```
SELECT first_name, family_nam, birthdate
        FROM people
```

Now you can filter the results of the query with an optional "WHERE" keyword and conditions. The WHERE conditions are optional and need only be used if you want to reduce the query results.

Example:

```
SELECT first_name, family_nam, birthdate
        FROM people
        WHERE birthdate >= {1959.01.01}
```

The above example will find all people who where born in 1959 or later. Note that the curly brackets are used to indicate a date. The date format must be in the format you have selected on the SETUP form. More on this later.

Finally, you can add some options to the query such as storing the results in a cursor (*) for use on a subsequent query (sometimes queries take more than one statement). You could also specify the sort order or group order. Again, a book on SQL will cover this in more detail. Here is a partial list of options you can use:

| | |
|---|---|
| ORDER BY <fieldname>[,<fieldname>...] | Specifies a sort order for the results |
| GROUP BY <fieldname>[,<fieldname>...] | Specifies a data grouping |
| HAVING <filter condition> | Sets a filter condition for the results |
| UNION <another SQL query> | Combines two or more query results |
| INTO <[TABLE] table or cursor name> | Specifies that the results should be placed in a table or cursor(*) |

(*) A cursor is just a temporary table storage area.

## Technical Syntax

Here is the complete technical description of the SQL SELECT syntax that the Query Manager will support:

```
SELECT [ALL | DISTINCT] [TOP nExpr [PERCENT]]
        [Alias.] Select_Item [AS Column_Name]
        [, [Alias.] Select_Item [AS Column_Name] ...]
FROM [FORCE]
        Table [Local_Alias]
        [[INNER | LEFT [OUTER] | RIGHT [OUTER] | FULL [OUTER] JOIN
                DatabaseName!]Table [Local_Alias]
                [ON JoinCondition …]
[PREFERENCE PreferenceName]
[WHERE JoinCondition [AND JoinCondition ...]
        [AND | OR FilterCondition [AND | OR FilterCondition ...]]]
[GROUP BY GroupColumn [, GroupColumn ...]]
[HAVING FilterCondition]
[UNION [ALL] SELECTCommand]
[ORDER BY Order_Item [ASC | DESC] [, Order_Item [ASC | DESC] ...]]
[INTO [CURSOR | TABLE] alias]
```

Where:

| | |
|---|---|
| [] | Indicates an optional item |
| \| | Means “or”.  Any one of the items can be used. |
| Alias | Table or cursor name |

## Visual FOXPRO Built-In Functions and Operators

You can combine the built-in functions and operators of Visual Foxpro into the queries you create.  A book on Visual Foxpro will give a complete list of the functions built into foxpro but here are some of the more useful ones:

| Function | Description |
|---|---|
| **Logical Functions:** | |
| ( ) | Mathematical grouping (to override precedence). |
| = | Equals, matches |
| #, <>, != | Does not equal |
| > | Greater than |
| < | Less than |
| >= | Greater than or equal |
| <= | Less than or equal |
| == | Exactly matches |
| % | Remainder |
| AND | Logical AND |
| OR | Logical OR |
| !, NOT | Logical Negation |
| .T. | Logical TRUE |
| .F. | Logical FALSE |

| Function | Description |
|---|---|
| EMPTY(fieldname) | Returns TRUE if field is empty |
| BETWEEN(expr1,expr2) | Returns TRUE if field is between the two expressions given. For example:<br>WHERE AMOUNT BETWEEN(250,300) |
| DELETED() | Returns TRUE if a record is marked deleted |
| **Date Functions:** | |
| {1999.01.01} | This is how you specify a date for a field of type date. You will need to use the date format chosen in the SETUP form. |
| BETWEEN(date1,date2) | Returns TRUE if the date is between the dates given (inclusive). For example:<br>WHERE BIRTHDATE BETWEEN({1963.01.01},{1973.01.01}) |
| CDOW(date) | Returns the character day of the week from a date or datetime field. (e.g. “Sunday”) |
| CMONTH(date) | Returns the character month (e.g. “July”) from a date or datetime field. |
| CTOD(cDate) | Converts a character to a date. (e.g. CTOD(“1999.01.01")) |
| CTOT(cDateTime) | Converts a character to a datetime. (e.g. CTOT(“1999.01.01 12:30 PM”)) |
| DATE() | Returns the current date in date format. |
| DATETIME() | Returns the current date and time in datetime format. |
| DAY(date) | Returns the number day from a date. |
| DOW(date) | Returns the day of the week from a date or datetime field. Sunday is day 1. |
| DTOC(date) | Converts a date to a character field. |
| DTOS(date) | Converts a date to a string in the format yyyyddmm |
| DTOT(date) | Converts a date field to a datetime field. |
| HOUR(datetime) | Returns the hour from a datetime field. |
| MINUTE(datetime) | Returns the minute portion from a datetime field. |
| MONTH(date) | Returns the numeric month from a date or datetime field. |
| SEC(datetime) | Returns the seconds portion from a datetime field. |
| SECONDS(datetime) | Returns the seconds elapsed since midnight. |
| TIME() | Returns the current time. |
| TTOC(datetime) | Converts a datetime field to a character string. |
| TTOD(datetime) | Converts a datetime field to a date field. |
| WEEK(date) | Returns the numeric week-of-the-year from a date or datetime field. |
| YEAR(date) | Returns the year portion of a date or datetime field. |
| **Math Functions:** | |
| AVG() | Return the average value of a field. (e.g. SELECT AVG(AMOUNT) FROM ...) |
| COUNT() | Return the number of records matching the query conditions. |
| MAX(num1,num2) | Returns the maximum of two given values. |
| MIN(num1,num2) | Returns the minimum of two given values. |
| ROUND(fieldname) | Rounds a number. |
| SUM(fieldname) | Returns the sum of a field. (e.g. SELECT SUM(AMOUNT) FROM ...) |
| VAL(fieldname) | Returns the numeric value of a character string. |
| **String (Text) Functions:** | |
| ASC(cExpression) | Returns the ASCII code of a character. |
| ALLT(cExpression) | Remove all leading and trailing blanks from a string. |

| Function | Description |
|---|---|
| AT(cSearchExpression, cExpressionSearched [,nOccurrence]) | Returns the position of the first occurrence of a character expression within another character expression or field counting from the leftmost character. You can also optionally specify which occurrence.<br><br>AT(cSearchExpression, cExpressionSearched [,nOccurrence]) |
| ATC(cSearchExpression, cExpressionSearched [,nOccurrence]) | Same as AT() but without respect to case. |
| CHR(num) | Returns as character based on an ASCII code. |
| LEN(fieldname) | Returns the length of the specified field. |
| LOWER(fieldname) | Converts a field to lower case. |
| MAX(string1,string2), MIN(string1,string2) | Returns the maximum or minimum string (e.g. "A" is less than "B") |
| OCCURS(cSearchExpression, cExpressionSearched) | Returns the number of times a character expression occurs in the given field:<br><br>OCCURS(cSearchExpression, cExpressionSearched) |
| PADL, PADR, PADC(eExpression, nResultSize [,cPadCharacter]) | Returns a string padded with blanks on the left (PADL), right (PADR) or both sides (PADC). You can also specify the padding character (default is space).<br><br>PADL(eExpression, nResultSize [,cPadCharacter]) |
| SOUNDEX(cExpression) | Returns a phonetic representation of the specified character field. |
| SPACE(num) | Returns a character string of the specified length filled with spaces. |
| STR(num) | Converts a numerical value to a string. |
| STRTRAN(cSearched, cSearchFor, cReplacement) | Searches a character field for occurrences of a second character expression and then replaces each occurrence with a third character expression.<br><br>STRTRAN(cSearched, cSearchFor, cReplacement) |
| STUFF(cExpression, nStartReplacement, nCharactersReplaced, cReplacement) | Returns a character string created by replacing a specified number of characters in a character expression with another character expression.<br><br>STUFF(cExpression, nStartReplacement, nCharactersReplaced, cReplacement) |
| SUBSTR(cExpression, nStartPosition, nCharactersRetrieved) | Returns a portion of a string from a given character field.<br><br>SUBSTR(cExpression, nStartPosition, nCharactersRetrieved) |
| UPPER(cExpression) | Converts a character field to upper case. |

Table 23-2 Microsoft Visual Foxpro Functions (Partial Listing)

## Example Queries

Here are some example queries you can experiment with:

Select everyone from the people database:

```
SELECT *
        FROM PEOPLE
```

Select any offering record greater than or equal to $250:

```
SELECT *
        FROM GIVING
        WHERE AMOUNT >= 250
```

Do it again but only select the person's name, the account and the amount:

```
SELECT FIRST_NAME, FAMILY_NAM, ACCOUNT, AMOUNT
        FROM GIVING
        WHERE AMOUNT > 250
```

Now remove dates prior to July 1st:

```
SELECT FIRST_NAME, FAMILY_NAM, ACCOUNT, AMOUNT
        FROM GIVING
        WHERE AMOUNT > 250 AND DATE_GIVEN > {1999.07.01}
```

Repeat the last two queries using an intermediate cursor:

```
SELECT FIRST_NAME, FAMILY_NAM, ACCOUNT, AMOUNT
        FROM GIVING
        WHERE AMOUNT > 250
        INTO CURSOR TEMP_CURSOR
```

```
SELECT *
        FROM TEMP_CURSOR
        WHERE DATE_GIVEN > {1999.07.01}
```

Note: To do 2 queries you must type in one at a time and run each separately.

Now do it again but sort on the giving date (date_given field) in ascending order.

```
SELECT FIRST_NAME, FAMILY_NAM, ACCOUNT, AMOUNT
        FROM GIVING
        WHERE AMOUNT > 250 AND DATE_GIVEN > {1999.07.01}
        ORDER BY DATE_GIVEN
```

Descending order would be done like this:

```
SELECT FIRST_NAME, FAMILY_NAM, ACCOUNT, AMOUNT
        FROM GIVING
```

```
        WHERE AMOUNT > 250 AND DATE_GIVEN > {1999.07.01}
        ORDER BY DATE_GIVEN DESCENDING
```

Find all people born on a Sunday:

```
SELECT FIRST_NAME, FAMILY_NAM
        FROM PEOPLE
        WHERE DOW(BIRTHDATE) = 1
```

Get the average offering amount for each giving account and sort by account:

```
SELECT ACCOUNT, AVG(AMOUNT)
        FROM GIVING
        GROUP BY ACCOUNT
        ORDER BY ACCOUNT
```

When searching for character strings an exact match is not necessary. To find all families whose last name starts with “Sm” do this (use the UPPER function to ignore case):

```
SELECT * FROM HOUSE
        WHERE UPPER(FAMILY_NAM) = “SM”
```

If an exact match is needed in the character string use two equal signs and the ALLT (trim all blanks) function:

```
SELECT * FROM HOUSE
        WHERE UPPER(ALLT(FAMILY_NAM)) == “SMITH”
```

Single or double quotes can be used:

```
SELECT * FROM HOUSE
        WHERE UPPER(ALLT(FAMILY_NAM)) == ‘SMITH’
```

## Complex Queries Using “Joins”

Suppose you have to find all people with a birthday in June and retrieve only their address information. This is a complex query that requires us to “join” two tables (House and People) since the birthday information is in the People table but the address information is in the House table. To join two tables you must find a field that is the same in both, in this case the family_id field. Here’s how it works:

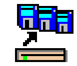
```
SELECT HOUSE.*
        FROM PEOPLE, HOUSE
        WHERE MONTH(BIRTHDATE) = 6 AND
                HOUSE.FAMILY_ID = PEOPLE.FAMILY_ID
```

The part underlined above is called the join condition since it sets the condition that joins the two tables together. In this case the family_id field must be the same in both tables in order to combine the records.

You can join as many tables as you like.

As you can see from the above examples the possibilities are limited only by your imagination. Experiment with the Query Manager and see what you can come up with.

# *Chapter 24 The Backup Manager*



ChurchWatch provides a Backup Manager which manages saving a copy of your ChurchWatch data to a safe location.  You can backup to any writeable destination such as USB memory sticks, FLASH cards, hard drives, removable hard drives, tape backup systems etc.  Any writeable device which has been assigned a drive letter (e.g. A:) in Windows can be used as a backup device.

Since the tables in ChurchWatch are inter-related, the Backup Manager makes a "snapshot" of all your tables.  You cannot backup or restore selected tables; the entire database system must be saved (and restored if necessary).

The Backup Manager backs up the current database only.  If you have a multi-church installation, you will need to backup each database/church individually.  In addition, you should do all database backups at the same time since the "sub-church" databases use some tables from the main church.  Backing up all churches at the same time is necessary to avoid missing important data.

***NOTE:*** *Although the Backup Manager supports backup to floppy disks, we highly recommend that you avoid this form of storage since floppies are a very unreliable form of storage.*

## Doing Your Own Backups

Starting in ChurchWatch Version 5, the entire writeable data contents of ChurchWatch is stored in one convenient folder (and sub-folders).  This includes your main database and all other databases.  The folder is called "ChurchWatch Data" and by default, is located directly under your ChurchWatch installation folder.

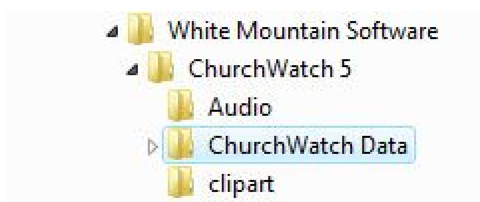



Figure 24-1  Locating the ChurchWatch Data Folder

***Note:*** *Because it is possible to locate the ChurchWatch Data folder anywhere you want, you may not find it in the location shown in figure 24-1.  This screenshot shows the default location of the ChurchWatch Data folder after installation.  Consult with your ChurchWatch administrator if you cannot locate the folder.*

Hence, it is now a trivial process to make your own backups.  Simply copy or save the entire ChurchWatch Data folder and all its contents and you have a backup of all writeable data items in ChurchWatch.  Then to Restore your own backup, you would simply copy the entire ChurchWatch Data folder and its contents back into place.

## Backup Strategy

Why do backups?  The answer is obvious, yet somewhere every day data is lost because someone neglected to do a backup.  Computers and disk drives are not immortal - they WILL fail at some point.  Your data represents a significant time investment and should be protected accordingly.  You should assign one or more people to be responsible for making daily backups.  You should also put a policy in place to rotate your backup media (disks, USB memory sticks etc). A good strategy is to have a different media for each day covering two weeks. At the end of two weeks you would begin again and so on. Another important strategy is to store some backups off-site in case of fire or other disaster. Still another good idea is to do a monthly backup that is never erased and store it off site. **We cannot stress enough how important it is to have a good backup policy in place and to stick to it - it's your responsibility.**

***Important:*** *Rotate your backup media and store at least some of them off-site.*

## What the Backup Manager Does

The Backup Manager is simply a copy manager, although it also has the capability to compress files. It copies all database files with the following type extensions from the ChurchWatch Data folder:

| | |
|---|---|
| *.DBF | Database tables |
| *.CDX | Index files |
| *.FPT | Memo (text) files |

Sub-church or other database folders are found directly under the ChurchWatch Data folder. The Backup Manager also copies ALL files from the following folders found under the ChurchWatch Data or Sub-church database folder:

| | |
|---|---|
| ARCHIVE | Past giving years archived data |
| PHOTOS | Photo files |
| SIGS | Digital Signatures |

The Backup Manager will remember the date and time of the last backup. In addition it can backup the giving archive folder and gives you the option of skipping system files.

***Note:*** *Because the Backup Manager just copies files, if a single file does not fit on the destination media, the Backup Manager will display an error and stop. This problem would likely show up in large churches that backup to a floppy drive. Since USB memory sticks are now very large and very inexpensive, we recommend using these. Never use floppy disks, even though they are supported by the Backup Manager..*

## Backing up to CD-ROM or DVD

The Backup Manager cannot backup directly to CD-ROMs or DVDs. However, there is a way around this that does not take too much extra time. Simply send your backup to a temporary (empty) folder on your hard drive somewhere. Then using Windows or your favorite CD/DVD burning program, burn this temporary folder to CD or DVD and then delete the temporary folder on your hard disk.

## The Backup Manager Form

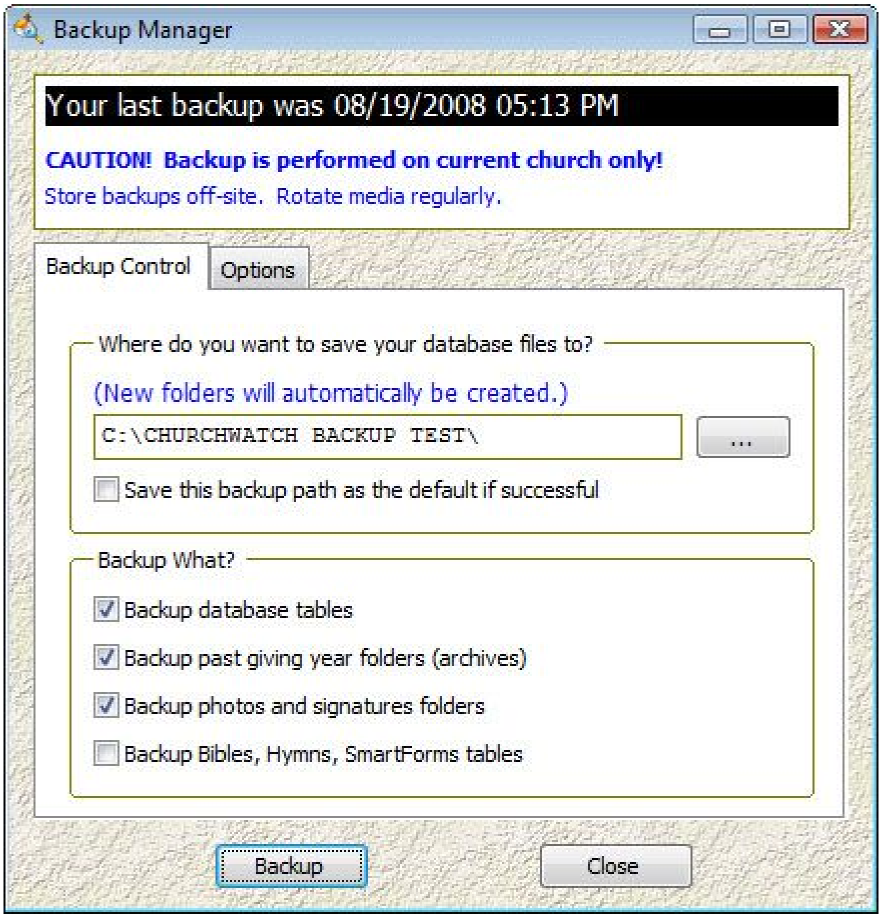



Figure 24-2 The Backup Manager

## To Perform a Backup

**STEP 1** Select the destination folder for the backup if the default is not suitable. You can use the "..." button to browse.

**STEP 2** Set the options on the Options page. Refer to table 24-1.

**STEP 3** Click the BACKUP button to start the backup.

## Setting the Default Backup Folder

To save time you can set a default backup folder in the Setup Manager under the MAINTENANCE page. Each time the Backup Manager is opened, this default folder is loaded as the backup destination. You can change it on the Backup Manager form as required.

Table 24-1 lists the form items on the Backup Manager form.

| Form Item | Description |
|---|---|
| PAGE 1 | |
| Backup Folder Name | Enter the path name to the folder where you want the backup files saved to. |
| ... | Click this button to help set the backup folder. |
| Save This Backup Path... | Check this box if you want to save the backup path as the default path. |
| Backup Database Files | Check this to backup all database tables. Normally leave this checked. |
| Backup Past Giving Year Folders (Archives) | Check this if you want to backup the ARCHIVE folder. |
| Backup Photos and Signatures Folders | Check this if you want to backup the PHOTOS and SIGS folders. |
| Backup Bibles, Hymns, SmartForms Tables | Check this if you want to backup “system” tables. Normally this is not necessary since these tables can be reinstalled or rebuilt. |
| PAGE 2 | |
| Compress Files | Check this to compress all files into a single .ZIP file. This can save considerable disk space but will not work well with floppy disk backups since the backup will not split files across disks. |
| Delete Contents of Backup Folder | Check this to delete the backup folder contents before copying any new files into the folder. |
| Erase Floppy Disks Completely | Check this to erase floppy disks before copying any files. Works only on drives A: and B:. |
| Display Information Messages and Warnings | Check this if you want the Backup Manager to warn you of problems. When doing automatic or timed backups, this should be unchecked. |
| Shut Program Down When Backup is Complete | Check this if you want ChurchWatch to shut down automatically when the backup is complete. |
| Initially Delay Backup For | You can set an initial backup delay with this item. This is useful to doing automatic backups at night or after hours. |
| Repeat Backup Every | You can also setup the Backup Manager to do periodic automatic updates. Set the timing with this item. |

Table 24-1 Backup Manager Form Items

## Delaying the Backup / Auto Shut Down

This is especially handy on a server based system. If you want to perform after-hours backups and then have ChurchWatch automatically shut down, check the “Shut program down…” and “Intially delay backup for” checkboxes on the Options page. Also set the number of hours or minutes to delay the backup. Then click the Backup button to begin the countdown. ChurchWatch will perform the backup and then shutdown after the specified delay.

## Repeating Backups

You can also setup the Backup Manager to continually perform backups automatically every so often. This is done by checking the “Repeat backup every…” checkbox and by setting the amount of time between backups on the Options page.

## *Chapter 25 The Restore Manager*

ChurchWatch provides a Restore Manager to complement the Backup Manager. The Restore Manager is used to copy all files from a previously stored backup, thus restoring ChurchWatch to the state it was in at the time of the Backup. You should carefully follow the backup strategies discussed in chapter 24. You can only restore to the current church. ChurchWatch will warn you if you try to restore data from one church to another or if you try to restore a backup from an older version of ChurchWatch.

***Note:*** *The Restore Manager copies ALL files from the specified source folder.*

### The Restore Manager Form

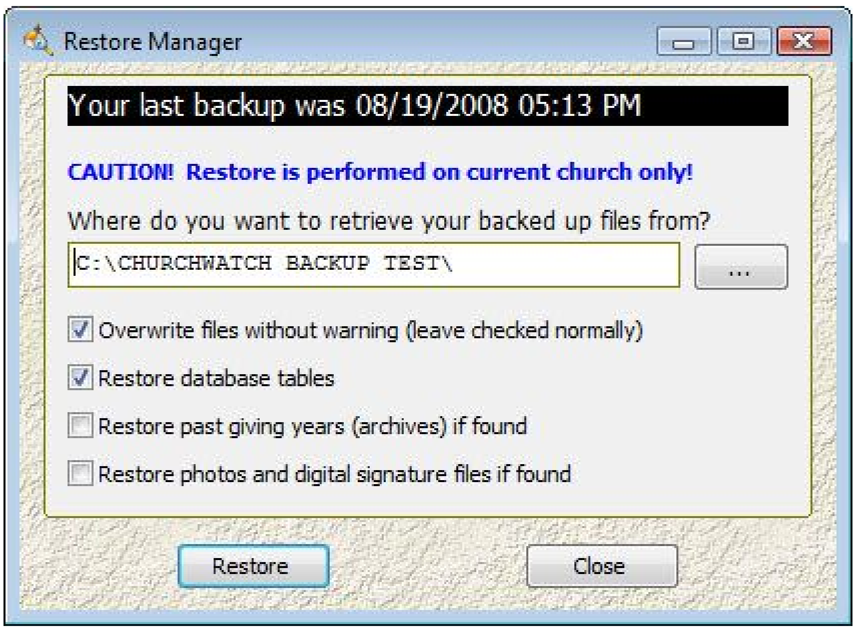



Figure 25-1 The Restore Manager

### To Perform a Restore

| | |
|---|---|
| **STEP 1** | Set the source folder. Use the "..." button to browse. If using floppy disks make sure disk #1 is in the drive. |
| **STEP 2** | Set the options. They are self-explanatory. Or you can check all options (ChurchWatch will automatically restore only if the related data is found). |
| **STEP 3** | Click the RESTORE button to copy all files from the source folder you specified into the current church's folder. |

ChurchWatch will notify you when the restore is complete.

# *Chapter 26 The Phone Dialer*

The Phone Dialer form is a handy phone book and auto-dialer. This is a very powerful ChurchWatch feature that most users miss. To use the phone dialer all you need is an analog phone line and a TAPI compliant analog modem (most are TAPI compliant). Check with your phone company to make sure your phone system is not digital. You will also need an analog phone. ChurchWatch uses TAPI compliant dialing to be compatible with a wide range of modems and Windows operating systems.

The Phone Dialer permits you to quickly dial any phone number stored in ChurchWatch. In addition you can add new phone numbers to the phone book as well as set up to six speed dials.

## Hardware Connections

To effectively use the phone dialer you will need to connect a phone to your modem. Any analog phone will do. The phone is not required for dialing, only for speaking. Connections should be made as follows:

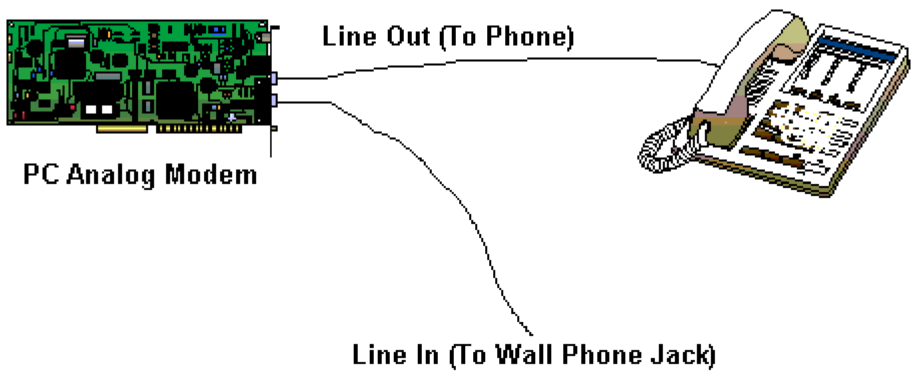



Figure 26-1 Modem and Phone Connections

## The Phone Dialer Form

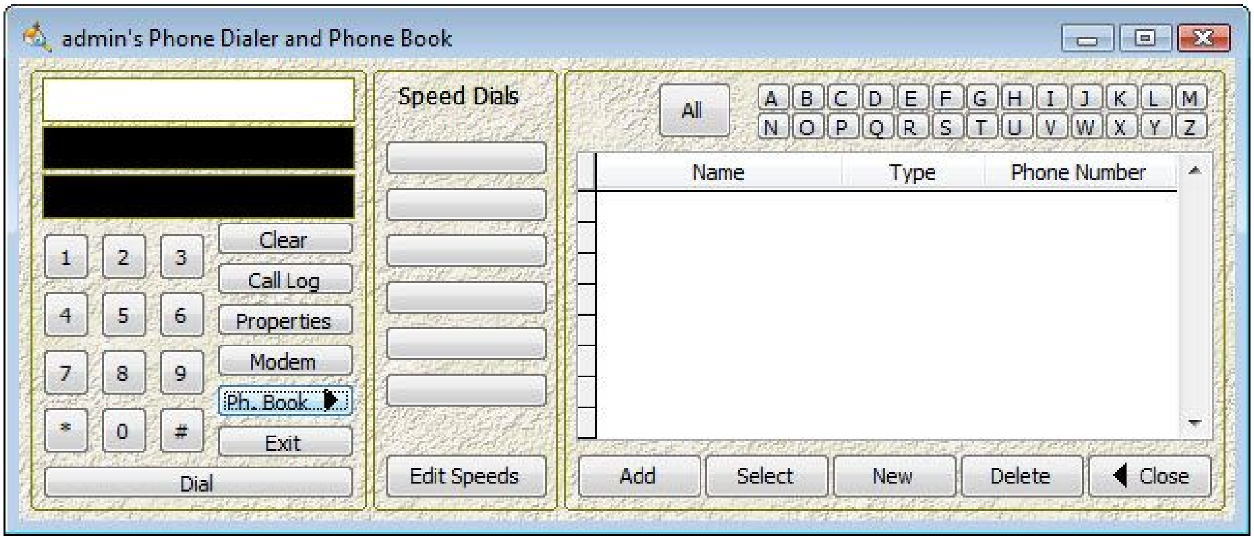



Figure 26-2 The Phone Dialer

You can display the Phone Dialer by clicking one of the DIAL buttons on the Membership Manager form. You can also access the Phone Dialer from the main menu under FORMS. Table 26-1 explains each item on the Phone Dialer Form.

| Form Item | Description |
|---|---|
| Fields in Top Left | These fields display the current name and current number being or about to be dialed. |
| Numeric keypad | Click the numbers on the “phone pad” to enter a phone number directly. Note that you can also place the mouse cursor in the top field and type in a new number from your keyboard. |
| Clear | Click this button to clear the current name and number. |
| Call Log | Click this button to access your call log. The present version of ChurchWatch is not capable of storing call times but does record who you called and when. |
| Properties | Click this button to setup your dialing properties such as location, call waiting, dialing prefixes etc. |
| Modem | Click this button to select and setup your modem. |
| Phone Book > | Click this button to display your phone book. Each user of ChurchWatch has their own personal phone book. You cannot see the phone numbers stored for other users. |
| Exit | Click this to exit the Phone Dialer. |
| Dial | Click this button to dial the current number. |
| Speed Dials | Click any of the speed dial buttons to immediately dial the number stored for the speed dial. |
| Edit Speeds | Click this button to edit the names and numbers stored under each speed dial button. |
| ALL | Click this to clear the current phone book filter and display all stored numbers. |
| A, B, C... | Click a letter button to reduce the visible phone book entries to only those that start with the selected letter. |
| Add | Click this button to add the current name and number to your phone book. To create a new entry use the NEW button instead. |
| Select | Select a row in the phone book and then click this button to make the entry the current name and number. Double clicking an entry in the phone book has the same effect. |
| New | Click this button to create a new phone book entry from scratch. After entering the name for the phone book entry, click on the phone number field and enter a phone number. |
| Delete | Select a row in the phone book and then click this button to delete it. Pressing the delete key on your keyboard has the same effect. |
| Close | Click this button to close the phone book. |

Table 26-1 Phone Dialer Form Items

## Dialing a Number

Once you have dialed a number, you need to pick up the phone and wait for the party to answer. Don’t pick up the phone until the modem has finished dialing.

***Tip:*** *The DIAL buttons in the Membership Manager will simply display the Phone Dialer. Click DIAL in the Phone Dialer to dial the phone.*

## The Phone Book

Each user of ChurchWatch has a phone book. You can store personal numbers here and then quickly dial them with the phone dialer. The people and phone numbers in your phone book do not have to be people stored in the church membership database. When the Phone Dialer is first displayed, the phone book may be hidden. Click the PHONE BOOK button to display it and once it is open you can click the CLOSE button to close it again. The phone dialer form is sizable if you need to see more phone book entries. You can also double click any entry in the phone book to make it the current number, and then click the dial button.

## *Chapter 27 The Mass Editor*

The Mass Editor is a handy utility for changing large numbers of records all at once. However, if you do not take care, it can also be a very dangerous utility since changes cannot be undone. For this reason, only the “admin” account has access to the Mass Editor.

The purpose of the Mass Editor is to make massive changes to your databases. For example, suppose from some reason, perhaps due to an import problem, that all of your country entries are “USA” and that you would like to change them to “Canada”. Instead of reviewing your entire membership database and making the change repeatedly one record at a time, you could use the Mass Editor to change all records with country = “USA” to “Canada” in one step.


Figure 27-1 The Mass Edit Form

## Setting a Field To a New Value

**Step 1** Do a backup using the Backup Manager.

**Step 2** On page 1, select “Set a field in all records in a table to one specific value” and then click the NEXT button.

**Step 3** Select the name of the table you are going to change and then click the NEXT button.

**Step 4** Select the name of the field you are going to change and then click the NEXT button.

**Step 5** Enter the new value to change to and then click the NEXT button.

**Step 6** Decide if the change will apply to all records or just a subset (“Set a Condition”).

**Step 7** Click the FINISH button to perform the change.

***Important:*** *If a problem occurs or you damage your database, use the Restore Manager to restore the backup you made in step 1.*

## Changing a Field From A Specific Value to a New Value

**Step 1** Do a backup using the Backup Manager.

**Step 2** On page 1, select “Change a table field from one value to another” and then click the NEXT button.

**Step 3** Select the name of the table you are going to change and then click the NEXT button.

**Step 4** Select the name of the field you are going to change and then click the NEXT button.

**Step 5** Enter the value you are changing FROM and then click the NEXT button.

**Step 6** Enter the new value to change to and then click the NEXT button.

**Step 7** Decide if the change will search all records or just a subset (“Set a Condition”). Note that setting a condition will allow you to change from one value to another but only if the condition is true. It can be used to create more sophisticated updates.

**Step 8** Click the FINISH button to perform the change.

***Important:*** *If a problem occurs or you damage your database, use the Restore Manager to restore the backup you made in step 1.*

# *Chapter 28 PhoneTree ™ Export*

PhoneTree ™ is a popular system for doing "cold calling" or for broadcasting announcements by phone. The basic idea of cold calling is that you record an important message and then have the PhoneTree equipment call everyone you'd like to hear the message...all done automatically. For more information on PhoneTree visit their web site at www.phonetree.com.

The PhoneTree Export utility in ChurchWatch is used to select a list of people or families from your Membership database. The utility will then create a simple text file that is a PhoneTree compatible import file that you can load into your PhoneTree equipment to make the calls.

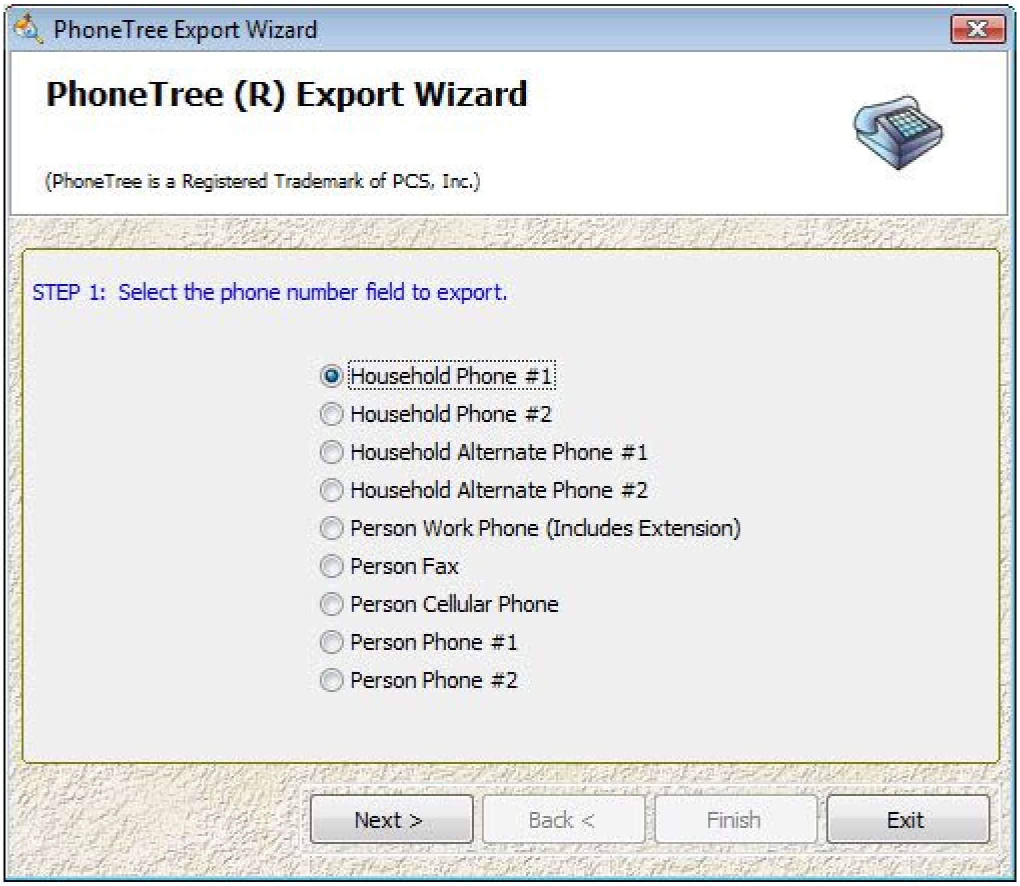



Figure 28-1 The PhoneTree Export Form

## Creating a PhoneTree File

**Step 1** On page 1, select the specific phone number field you want to use and then click the NEXT button.

**Step 2** If a filter is desired (refer to chapter 29) to select specific records, create it at step 2. Click the NEXT button.

**Step 3** Click the FINISH button. When prompted, enter the path and name of the file you wish to place the exported data into. This is the file that you will pass to the PhoneTree equipment and software. The file extension should be ".CSV".

When the export completes, you will be given the opportunity to view the exported data. Refer to your PhoneTree documentation and import this data file into PhoneTree to begin the cold calls.

# Chapter 29 Data Filtering

Data filtering is one of the more powerful features of ChurchWatch once you understand how to build a data filter. Data filters can be as simple or as complex as you want. Carefully read and study this chapter.

To put it simply, the purpose of a data filter is to reduce the view of a set of data. For example, instead of having a view of all people in the church database, perhaps all you are interested in is “men who were born this month”. Or suppose the pastor walks into your office and asks you for a simple listing of all women who gave an offering last month. You could do it with a ChurchWatch report but you might have to sift through alot of data that also includes men. By using a data filter and a QuickReport in the Membership Manager, you could retrieve this information before the pastor can leave your office!

Data filters are used in the Membership Manager, the Giving Manager, the Report Manager, and the Export Manager and in many other places throughout ChurchWatch. For this reason, understanding how data filters work and how to build one will make you a much more efficient ChurchWatch user. Figure 29-1 gives a simple example of a data filter.

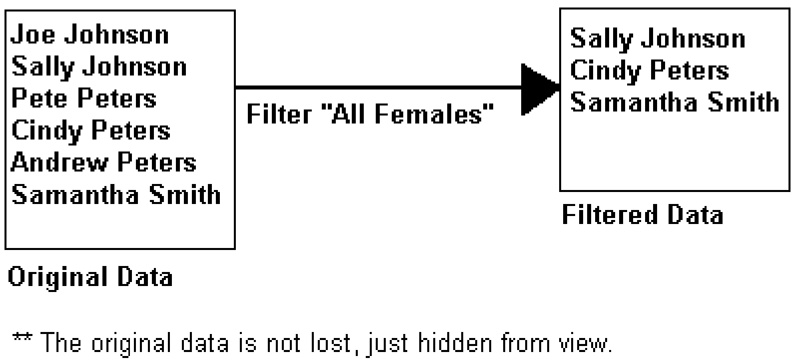



Figure 29-1 An Example Data Filter

## Stonefield Query

ChurchWatch uses a product called Stonefield Query to present an easy to use interface for building data filters. Most of the main forms in ChurchWatch have a SET FILTER button. Click this button to display the filter builder shown in Figure 29-2.

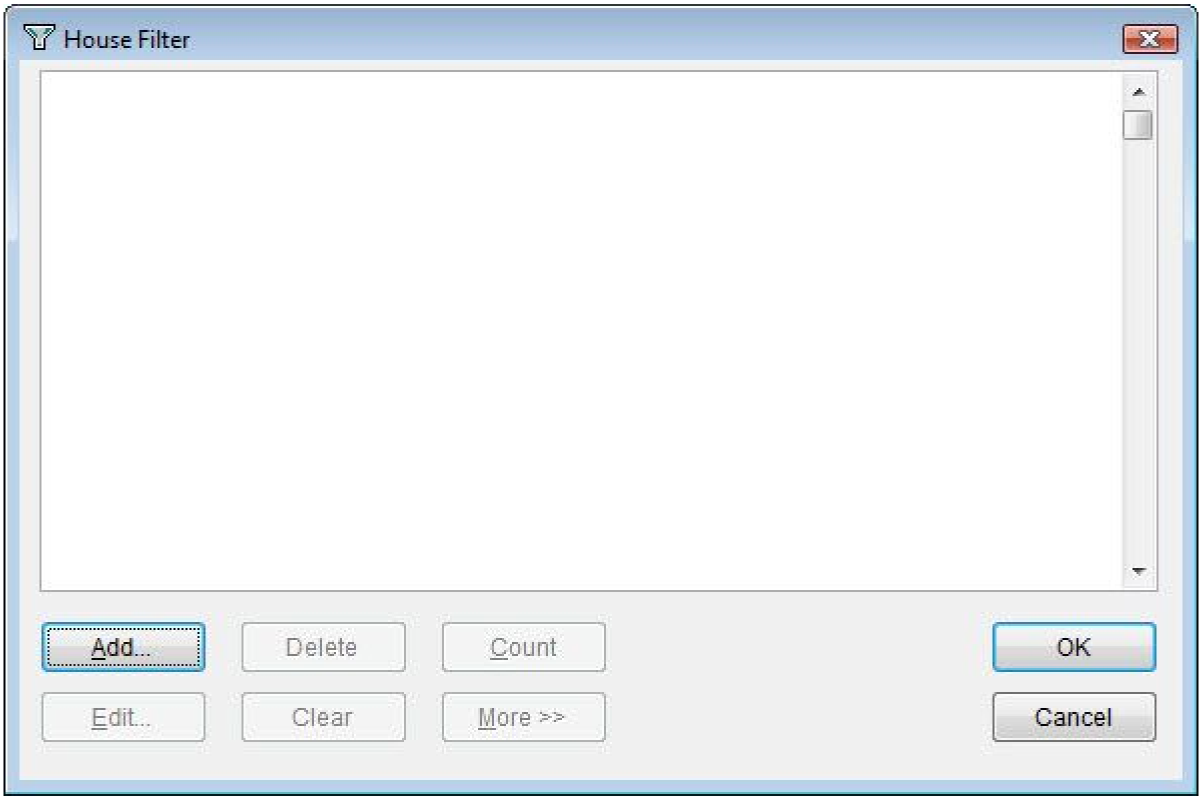



Figure 29-2 The Filter Builder

The filter builder form has a window showing the current filter you have built and are using. In the example in figure 29-2 the window is blank because no filter has yet been built. Table 29-1 explains each of the buttons on this form.

| Form Button | Description |
|---|---|
| Add | Click the ADD button to begin creating a data filter. |
| Delete | Click the Delete button to delete the current filter. |
| Count | Click this button to quickly count how many records are included in the new view based on the current data filter you have built. |
| Edit | Click this button to make changes to the current data filter |
| Clear | Click this button to delete the current data filter. |
| More | Click this button for more options such as saving the current data filter for later use. Refer to the paragraph on saving data filters. |
| OK | Click this button to accept the current data filter and exit. |
| Cancel | Click this button to cancel any changes you have made to the current data filter and exit the form. |

Table 29-1 Data Filter Builder Form Buttons

## Creating a Data Filter

To begin building a data filter click, the ADD button.  The form shown in figure 29-3 will be displayed.

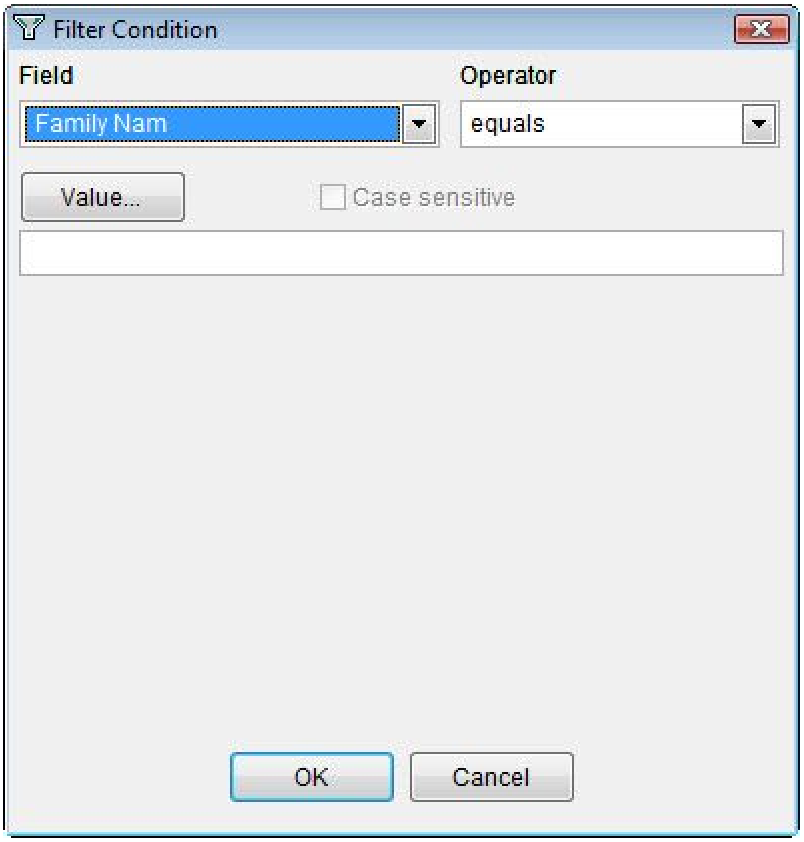



Figure 29-3  Filter Condition Builder

The Filter Condition builder form has two main fields, both found at the top of the form.  The "Field" pull down list contains all fields that you can choose from.  You will probably need to refer to Appendix A for table and field information.  Items in the list that are greyed-out are titles that indicate the name of the table the fields that follow are from.  Knowing the name of the table will a help when you refer to Appendix A.  The second main form item is the "Operator" field.  This field allows you to choose a comparison operator which is one of:

| Operator | Applies To | Description |
|---|---|---|
| equals | Any field type | matches, is the same |
| does not equal | Any field type | does not match, not the same |
| begins with | Character fields | Character field begins with the text string you provide<br>e.g. Begins with “Sm” |
| contains | Character fields | Fields chosen from the table must contain the text string you provide and it can be found anywhere. |
| does not contain | Character fields | Fields chosen from the table must NOT contain the text string you provide and it can be found anywhere. |
| Is blank | Any field | Field is empty, blank, nothing entered |
| Is not blank | Any field | Field has something entered in it, non blank |
| is greater than | Any field except logical | Field is greater than the value you provide. For character fields “B” is greater than “A”. |
| is greater than or equal to | Any field except logical | Field is greater than or equal to the value you provide. For character fields “B” is greater than “A”. |
| is less than | Any field except logical | Field is less than the value you provide. For character fields “A” is less than “B”. |
| is less than or equal to | Any field except logical | Field is less than or equal to the value you provide. For character fields “A” is less than “B”. |
| is between | Any field except logical | Field is between two values you supply. |
| is one of | Any field | Field must match one of a set of values you provide. |

Table 29-2 Operators

What you see on the rest of the form depends on which operator you choose.

Here’s an example. Suppose you are in the Membership Manager and you want to build a filter that includes all family names that begin with the letter “W”. To build the filter follow these steps:

**Step 1** Looking in Appendix A you would find that the House table has a field called “family_nam”. In the above example you would find the greyed-out title “House” which would indicate the House Table, and then find the family_nam field and choose it.

**Step 2** Now you need to decide on an operator. Looking at table 29-2 you would choose the “begins with” operator because you want all people with family names that begin with the letter “W”.

**Step 3** When you choose the “begins with” operator the form will change and show a button labeled “VALUE” and a blank field. You can either click the VALUE button or simply enter a value. In this case you would probably enter a “W” in the blank field. At this point the form should look like the one in figure 29-4.

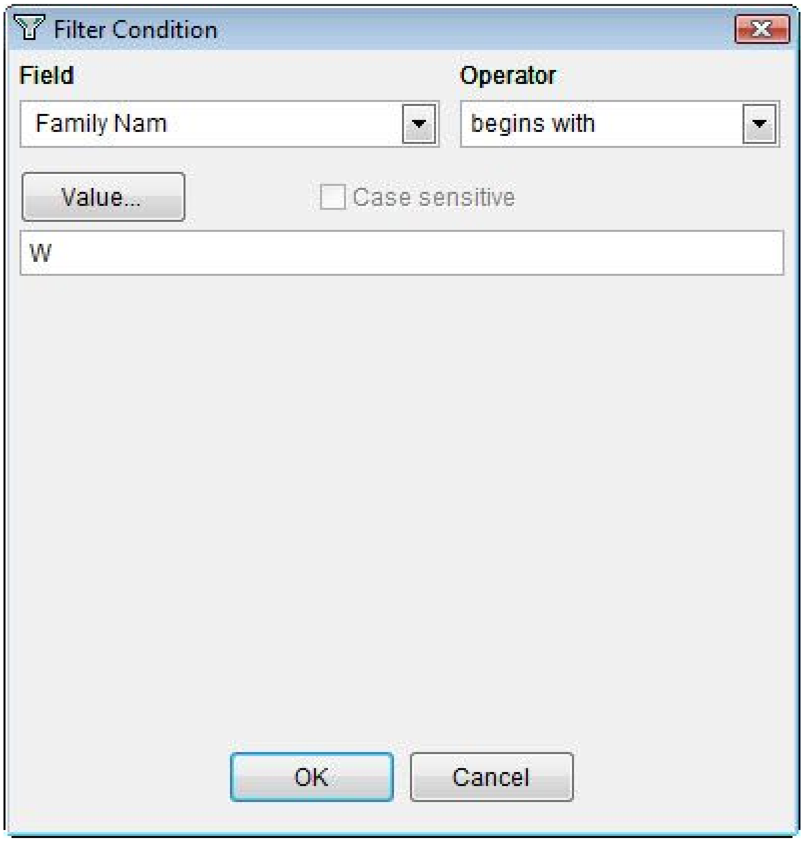



Figure 29-4 Example Filter Condition

**Step 4** Click the OK button to Exit. The filter builder will be showing the current filter you have built. In this example: “family_nam begins with W“

**Step 5** Click OK again. The Membership Manager will now only show people with a family name that begins with “W”. The word “[Filtered]” will be displayed near the top of the Membership Manager to remind you that you have a filter in effect. You can clear the filter by clicking the CLEAR FILTERS button in the Membership Manager or by going back into the filter builder (CUSTOM button) and clicking the DELETE button.

## Quick Report

Some forms have a Quick Report button. Once you have your filter built you can do a Quick Report to send the data to the printer or to mailing labels. Click the QUICK REPORT button in the form you are using (Membership or Giving Managers for example).

## Compound Filters

Suppose you need to expand the above filter example to include only men whose last name begins with "W". This type of filter is called a "compound filter" because more than one condition is required to complete it. Assuming the original filter is still in effect, here is how you would add a second condition to create a compound filter.

**Step 1** In the Membership Manager, click the CUSTOM button again to edit the filter.

**Step 2** Click the ADD button in the filter builder to add the second condition. This time you will notice that the filter condition form has changed. It now includes a "Connection" field.

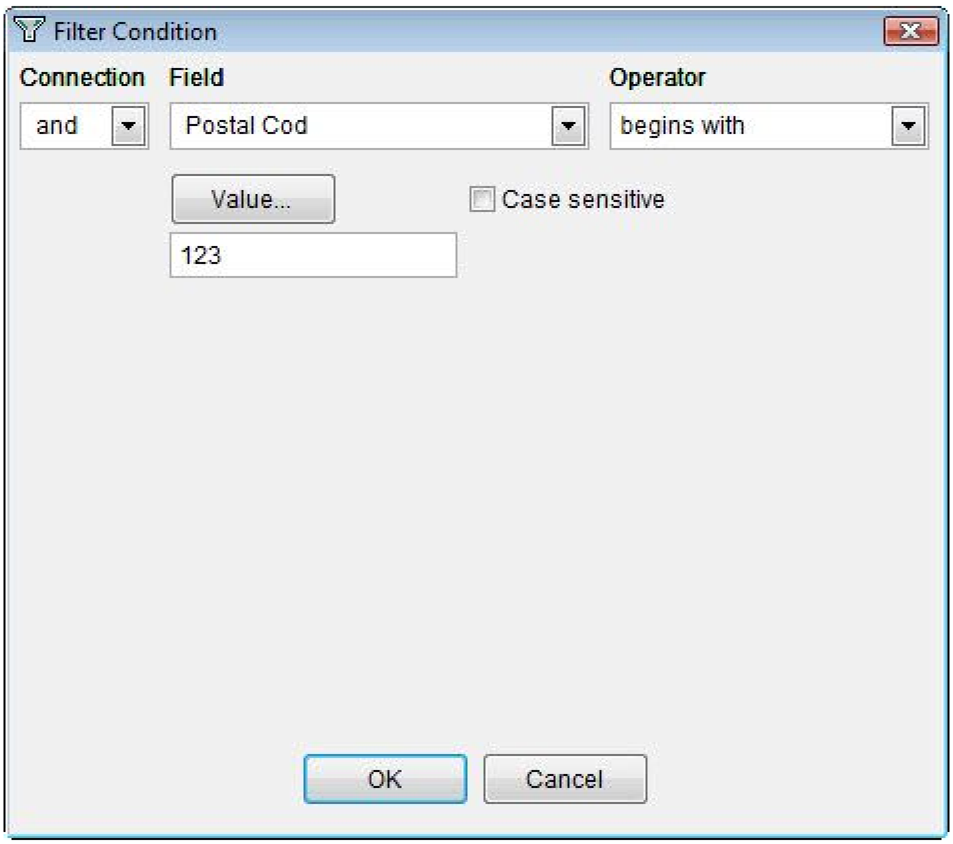



Figure 29-5 Filter Condition Form, Compound Filter

**Step 3** Choose a connection type. This is where things get more difficult. Refer to table 29-3 for help.

<table>
<tr><th>Connection</th><th>Description</th></tr>
<tr><td>and</td><td>Logical “AND”. A AND B means that both A and B must be true. In the filter example below, gender must be male AND family_name must begin with “W”. This is the filter you would use for the example we are working on.<br><br>e.g. sex = “M” and family_nam begins with”W”<br><br>This would give a list of all males whose last name begins with the letter W.</td></tr>
<tr><td>or</td><td>Logical “OR”. A OR B means that if either A or B is true the field is accepted in the filter. For example, if we wanted all males OR people with a family name beginning with “W” the filter would be:<br><br>e.g. sex = “M” or family_nam begins with”W”<br><br>This would give a list of all males AND any person whose last name begins with W.</td></tr>
<tr><td>and (<br>) and<br>) and (<br>or (<br>) or<br>) or (</td><td>Filter conditions always work from left to right. If you would like to override the order, you need to use brackets. Brackets are usually only required for compound filters that contain more than two (2) conditions. Items in brackets are always checked first. To illustrate how the use of brackets can change a filter refer to the following three examples:<br><br>sex = “M” and family_name begins with “S” or family_nam begins with “W”<br><br>The above filter gives all males whose last name begins with S AND any person whose last name begins with “W” because the filter works from left to right.<br><br>sex = “M” and (family_name begins with “S” or family_nam begins with “W”)<br><br>The above filter gives all males whose last name begins with S or W because we have given preference to the items in brackets.<br><br>(sex = “M” and family_name begins with “S”) or family_nam begins with “W”<br><br>The above filter gives all males whose last name begins with S AND any person whose last name begins with “W”. You can see that by moving the brackets, or not using brackets at all can produce quite different results.</td></tr>
</table>

Table 29-3 Connections

**Step 4** After choosing a connection finish the filter by selecting the appropriate field of interest, another operator and the appropriate value(s).

**Step 5** Click OK. Check the filter displayed for correctness. Click OK again to put the filter into effect.

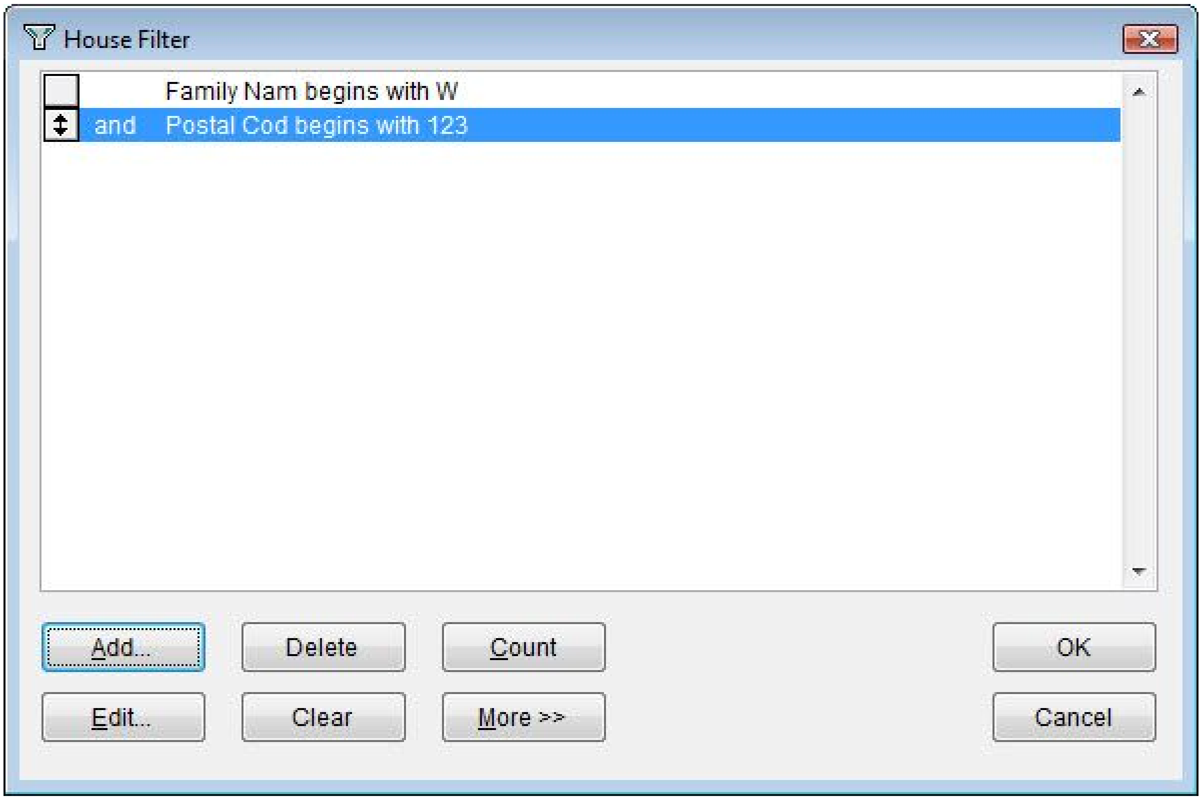



Figure 29-6 The Resulting Compound Filter

## Saving and Restoring Filters

Once you have a filter working properly you can save it for use at a later date. To save a filter do this:

**Step 1** Display the filter builder.

**Step 2** Click the MORE>>> button to display the STORE, RETRIEVE and REMOVE buttons. Refer to figure 29-7.

**Step 3** Click the STORE button. In the form displayed, enter a descriptive name and detailed description of the filter. Then click OK. The filter will be saved with the name you entered.

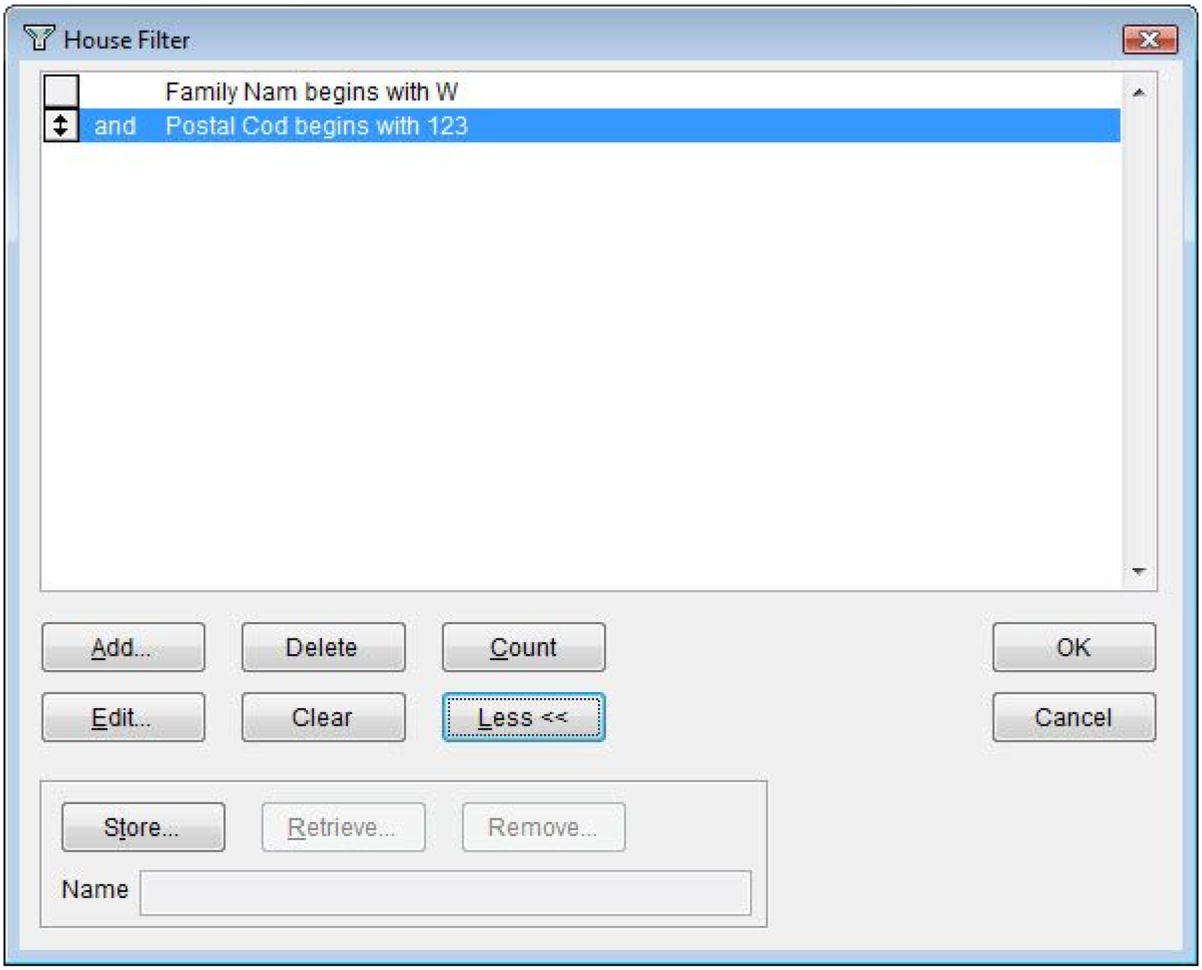



Figure 29-7 Storage and Retrieval of Filters

**To Retrieve a Filter:**

**Step 1** Display the filter builder.

**Step 2** Click the MORE>>> button to display the STORE, RETRIEVE and REMOVE buttons. Refer to figure 29-7.

**Step 3** Click the RETRIEVE button. In the form displayed, select a filter from the list. Then click OK to exit the form. At this point you can click the REMOVE button to delete the filter or click OK a second time to put the filter into effect.

***Note:*** *All data filters are stored in the same place. All users of ChurchWatch use the same set of saved filters. Keep this in mind if you create a filter you do not want other users to have access to.*

***Tip:*** *To remove a filter, first retrieve it and then click the REMOVE button.*

## Example Filters

From these filter examples you can see how useful data filters can be.

1. All people with a birthday this month (July):

   From the Membership Manager:
   Month of birth equals July

2. All people with a birthday between January and April:

   From the Membership Manager:
   Month of birth is one of January, February, March, April

3. All people who gave an offering last month (January):

   From the Membership Manager:
   date given is between 1999.01.01 and 1999.01.31

   or from the Giving Manager:
   giving month equals January

4. All people in the Smith small group:

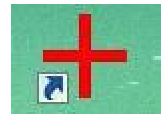
   From the Membership Manager:
   (under Grp Type) Name equals Smith Small Group

5. All families that live in an area with a zip code prefix 849:

   From the Membership Manager:
   postal cod begins with 849

***Tip:*** *After creating your data filter, use the Quick Report to create a report. Combining a data filter with a Quick Report is a great way to create your own reports.*

# *Chapter 30 The Database Rescue Utility*



ChurchWatch includes a Database Rescue Utility for repairing data tables. After a power outage or computer crash your database tables may need minor repair. This is where the Database Rescue Utility comes in handy.

The Database Rescue Utility is a program that is external to ChurchWatch and can be launched successfully regardless of the state of your database tables. To launch the form, locate the Database Rescue Utility in the ChurchWatch folder on your desktop and double click it:

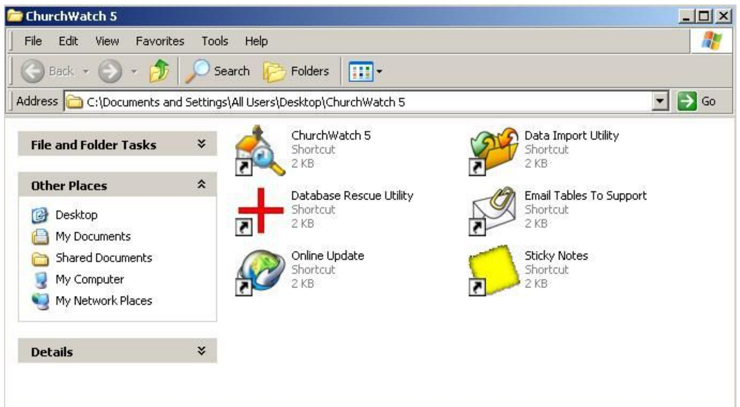



Figure 30-1 Database Rescue Utility in the ChurchWatch Folder on your Desktop

Another method for launching the Database Rescue Utility is to choose START->ALL PROGRAMS->CHURCHWATCH 5->DATABASE RESCUE UTILITY from your Windows Start Menu.

## Database Rescue Utility Form

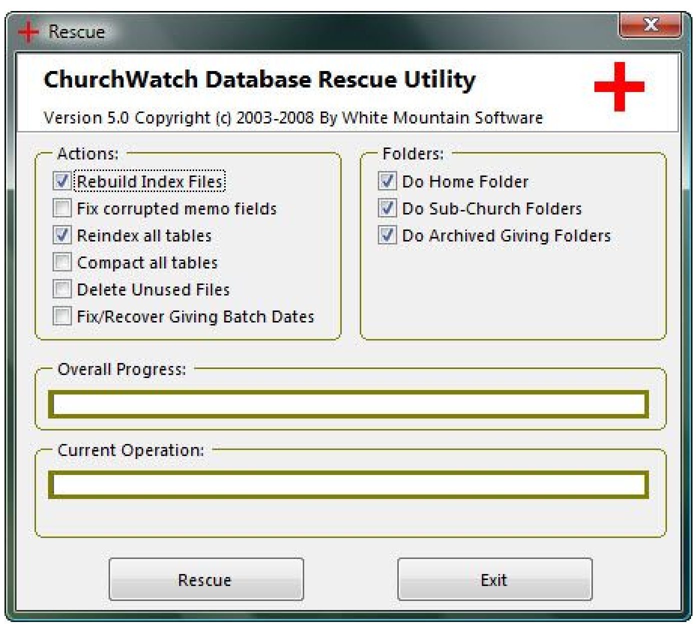



Figure 30-2 The Database Rescue Utility

Use of the Database Rescue Utility is fairly straightforward. Select one or more actions from the "Actions" box on the left. Then decide which folders to apply the actions to and select one or more in the "Folders" box on the right. Sub-Church folders refers to other databases you may have defined, other than the main database. Finally, click the RESCUE button to repair all database tables in the selected folders. Table 30-1 explains each of the actions and the folder choices.

| Form Item | Description |
|---|---|
| Rebuild Index Files | This selection is much stronger than a table reindex. It will actually delete all index files (.CDX) and recreate them from scratch. |
| Fix Corrupted Memo Fields | Rarely ever needed there is no need to check this selection unless directed to do so by White Mountain Software. |
| Reindex All Tables | This is a normal reindex of index files and should be done fairly often. |
| Compact All Tables | Deleted records in ChurchWatch are never physically deleted until you compact (pack) your database tables. Select this item to reduce the disk space required to store your files (ie records marked for deletion are physically removed). |
| Delete Unused Files | Stray database files that are no longer used by ChurchWatch are deleted if you choose this option. |
| Fix/Recover Giving Batch Dates | Use this if one or more of your offering batches goes missing after a power outage or crash. This will relink the batch definitions to the giving data. |
| Do Home Folder | This item would normally be selected. This is the home church folder (ie the ChurchWatch root). |
| Do Sub-Church Folders | If you have setup multiple databases check this to repair tables in the other database folders. |
| Do Archived Giving Folders | Check this to repair data under the folder "ARCHIVE" for each church or database. The "ARCHIVE" folder contains archived giving and pledge data. |

Table 30-1 Database Rescue Form Items

## When Do I Use It?

After a power outage or computer crash, you should always reindex your data tables. While you data is OK, it is the sort index files that can get corrupted. You can do this either from the Setup Manager, Maintenance page in ChurchWatch or in the Database Rescue Utility. If you launch ChurchWatch and you receive an error that a table is corrupted and must be repaired before use, run the Database Rescue Utility and check "reindex all tables" and "rebuild index files". In most cases this will repair your data tables without any loss of data. If this does not solve the problem, contact White Mountain Software for other options.

# Chapter 31 The Online Software Update Utility

You can upgrade ChurchWatch for free via the internet with the built in update utility.

There are three ways to launch the update utility:

1. From the ChurchWatch 5 folder on your desktop.
2. From the HELP menu of ChurchWatch (HELP->UPDATE YOUR SOFTWARE ONLINE)
3. From the Windows Start Menu (START->ALL PROGRAMS->CHURCHWATCH 5-> ONLINE UPDATE)

You must have a live connection to the internet for the update utility to work. White Mountain Software recommends updating often. If your software is up to date you will be notified when you attempt to upgrade.

***Note:*** *The Online Software Update Utility requires Windows administrator privileges. On Windows Vista systems, the program automatically asks Vista to raise the privileges. You may be presented with a prompt that states "an unidentified program wants to access your computer". Click the Allow button if this occurs.*

***Tip:*** *Watch the ChurchWatch News window for notices of new releases.*

## The Online Update Form

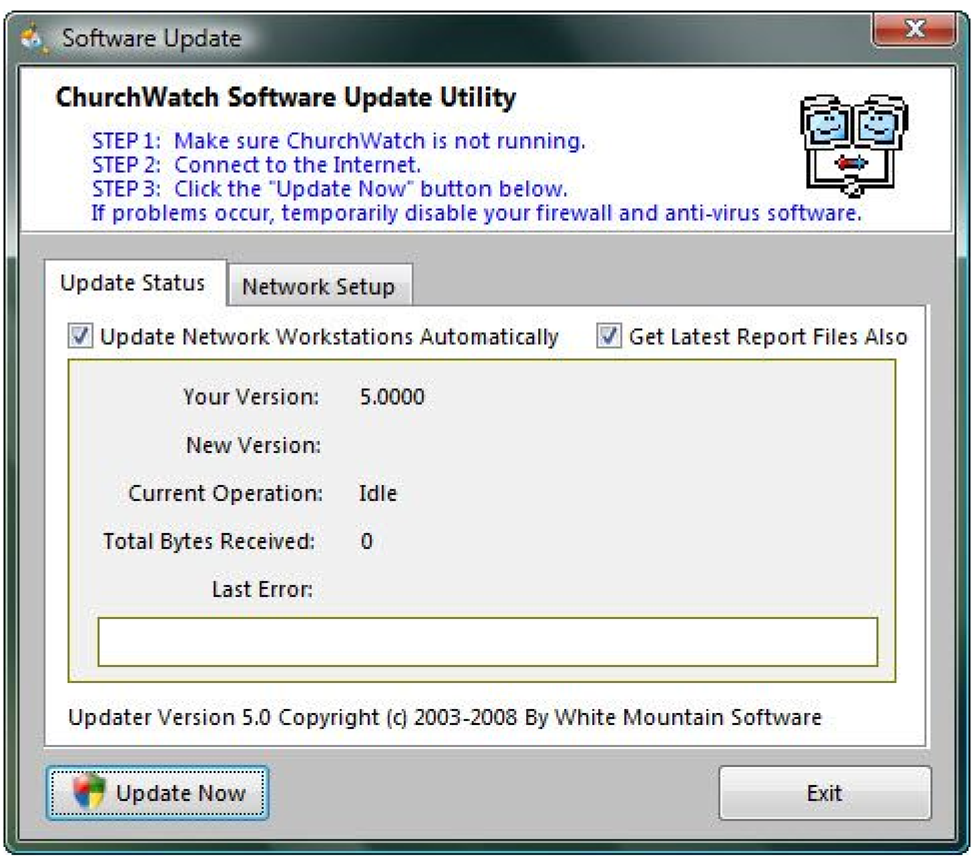



Figure 31-1 The Online Software Update Utility

## Quick-Update for Non-Network Users (Single User Version of ChurchWatch)

1. Uncheck “Update Network Workstations Automatically”. Check “Get Latest Report Files Also” if you want to update your report files.

2. Click the UPDATE NOW button.

## Quick-Update for ChurchWatch Network Users

1. Follow this procedure on your network server ONLY.

2. Set up paths to your network workstation’s ChurchWatch folder(s) if you have not already done so (more detailed information follows).

3. Make sure “Update Network Workstations Automatically” is checked. Check “Get Latest Report Files Also” if you want to update your report files.

4. Click the UPDATE NOW button.

## Manual Updating Network Workstations

Another method for network users is to manually update the network workstations.

1. Using the Single User instructions above, update ChurchWatch at your network server.

2. Manually copy the cwatch.exe file from the ChurchWatch folder on your network server to the ChurchWatch folder on each of your workstations.

## Network Setup for One Step Update

Refer to figure 31-2 below. This procedure is done at your network server only. This procedure only needs to be done once or any time you change your network configuration since the list of workstations will be remembered for next time.

For each network workstation you must create a path to the workstation's ChurchWatch folder relative to the server. This may require setting up permanent drive mappings to each of these folders so that the path can be referenced by drive letter but this is not necessary. In addition, all workstations to be updated must be powered on and connected to the network and the server must have write permission into the workstation's ChurchWatch folder.

Enter a path in the path field or click the "..." button to browse for a path to the workstation's ChurchWatch folder. Click the ADD button to add the path to the list of workstations to be automatically updated. Continue doing so until all workstations are accounted for. If you make a mistake or remove a computer from your network, first select the workstation path to remove and then click the REMOVE button.

The UPDATE button can be used to manually update one or more workstations immediately. This is handy in the case where you forgot to turn on one or more workstations or some other problem occurred. Begin by selecting one or more workstation paths from the list (**tip:** Use CTRL-Click to select multiple items). Next click the UPDATE button to update the selected workstations.

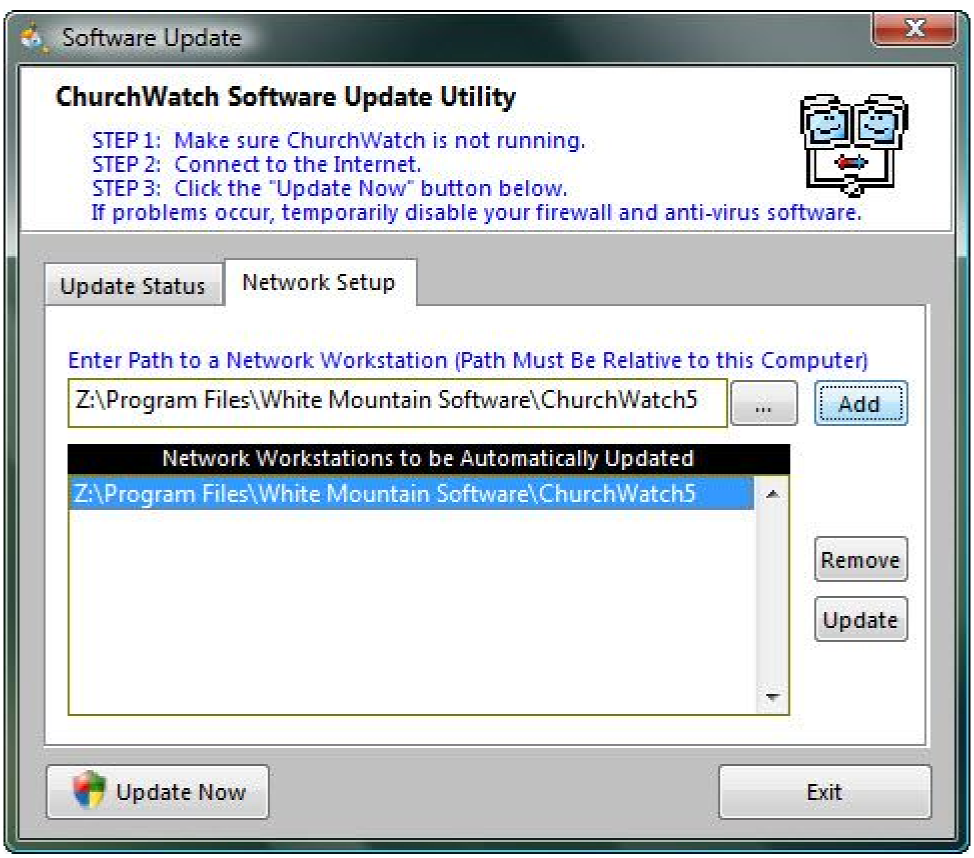



Figure 31-2 Setting up Network Paths to your Workstations

## Form Items

| Form Item | Description |
|---|---|
| PAGE 1 | |
| Update Network Workstations Automatically | Check this box only if you have the network version of ChurchWatch and one or more workstations defined on the Network Setup page. |
| Get Latest Report Files Also | Check this box if you want to update your report files. ChurchWatch will detect if you have made changes to the non-Report Manager reports and will warn you before overwriting. |
| Update Now Button | Click this button to update your software |
| Exit Button | Click this button to close the form. |
| PAGE 2 | |
| Path field | Enter/edit path names in this data entry field. |
| ... | Click this button to browse your hard drives and network for a path to a network workstation's ChurchWatch root folder. |
| Add | Click this button to add the path in the path field to the list of workstation paths. |
| Remove | Click this button to remove one or more selected workstation paths. |
| Update | Click this button to manually update one or more selected workstation paths immediately. This button will not update or affect the software on your server. |
| Workstation List | This list contains the paths that will be updated each time you do a software update. This list is remembered for the next time you launch the update utility. |

Table 33-1 Software Update Utility Form Items

## *Chapter 32 The Data Send Utility (Email Tables to Support)*

From time to time, it may be necessary to send your data to support for repair or examination. In previous versions of ChurchWatch, this capability was built into the program. However, if your data was corrupted such that ChurchWatch will not launch properly, the data had to be sent manually - a time consuming and complex operation.

ChurchWatch now includes a handy external utility for emailing your data to support. To launch the utility, choose START->PROGRAMS->CHURCHWATCH 5->EMAIL TABLES TO SUPPORT from your Windows Start menu. You can also access this utility from the ChurchWatch folder on your desktop.

***Important:*** *Before using this utility be sure your email settings are correct in the Setup Manager.*

### Data Send Utility Form

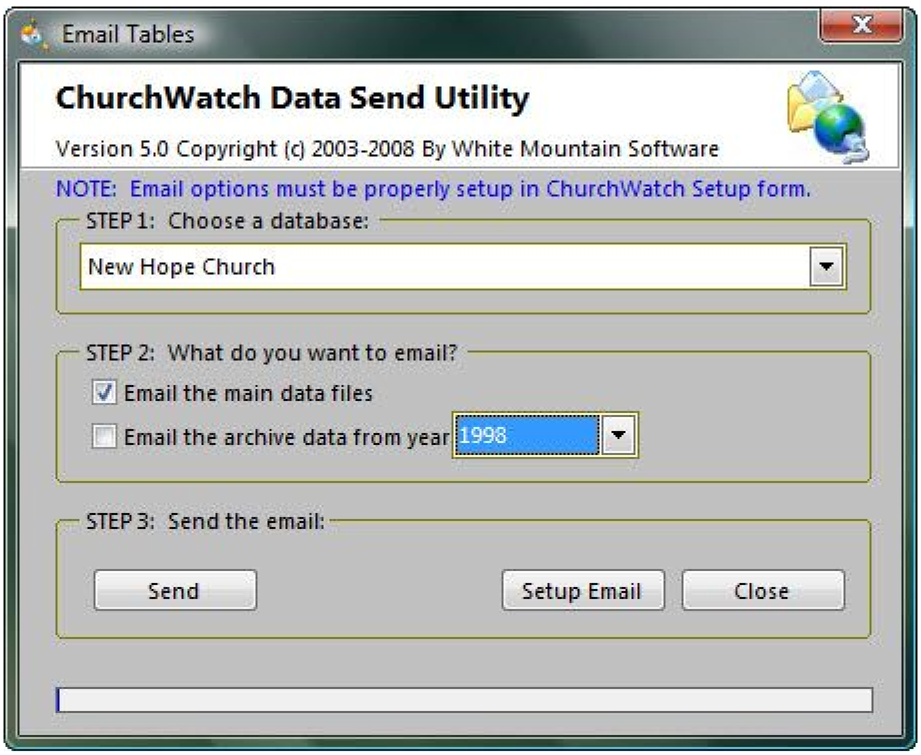



Figure 32-1 Data Send Utility

Begin by choosing a database. This will already be filled out with the name of your home church database, and for most users, this will suffice. Next, decide if you want to email the main data files and/or email a specific archived data year (you may do both at once if desired). In most cases, you will be sending the main data files. Finally, click the SEND button to compress and email the data to White Mountain Software.

If necessary, you can click the SETUP EMAIL button to adjust your email properties.

The CLOSE button will close this form.

## Troubleshooting Email

If you have trouble sending email, temporarily turn off any virus checkers, firewalls or internet security programs. If Windows prompts you for confirmation, allow ChurchWatch to send the email.

# *Chapter 33 Support*

## The Support Contract

In order to receive telephone and email support beyond the 30 day free period, you will need to purchase the optional support contract. The support contract is highly recommended. Please contact White Mountain Software for current pricing. The support contract is valid for a period of twelve months from activation. The support contract costs go toward paying for support time and ongoing improvements to ChurchWatch.

## ChurchWatch News Page

If you have a full-time internet connection we highly recommend that you allow the ChurchWatch News page to open each time you start ChurchWatch. If you find it annoying, set the timer on the bottom of the form to automatically close the form after a few seconds. The news page will allow you to see important announcements from White Mountain Software.

## Web Page and Periodic Software Updates

The home page of ChurchWatch is http://www.churchwatch.com. The home page of White Mountain Software is http://www.whitemountainsoftware.com. Watch the churchwatch.com page for periodic software updates and for other support information and news. You can use the automatic online update feature of ChurchWatch to check for new software at any time (and you should do so from time to time).

## Support Page, FAQ, How-To's, Newsletters

You can find a wealth of information that is not found in the User's Manual on our web site:

| | |
|---|---|
| Frequently asked questions: | www.churchwatch.com/faq.htm |
| Support page: | www.churchwatch.com/support.htm |
| Newletters and How-To's: | www.churchwatch.com/support.htm |

## Contact Information

White Mountain Software
610 Bronson Cres.
Saskatoon, SK.
CANADA S7J 5E5
306.955.3657

support@churchwatch.com
sales@churchwatch.com

## Support Hours

White Mountain Software is a home based business. Sales Office hours are 9:00AM to 11:30AM and 1:00PM to 5:00PM Central Standard Time Monday through Friday. Technical support is available between the hours of 6:00PM and 9:00PM Central Standard Time Monday through Friday and 9:00AM to 9:00PM most Saturdays. Email is highly recommended and emails will be answered by the next business morning. Whenever possible please use email for your questions and comments. Note that if you do not receive a response, at least by the next business day, assume your email was lost and resend it.

## New Reports

If the report you need is missing from ChurchWatch, White Mountain Software may be able to add the report you require for a small hourly fee. Contact us for current pricing.

Suggestions for Improvements and Bug Reporting

Please email bug reports to admin@churchwatch.com. We welcome suggestions for improvements and most new versions are based almost entirely on customer feedback. Please email suggestions to admin@churchwatch.com.

**Thank you and enjoy the software!**

*The White Mountain Software team*

# Appendix A – Table Structures

This appendix lists each database table used in ChurchWatch and the corresponding field names and types. The type is one of:

| | |
|---|---|
| Numeric | Numbers only |
| Character | Character text or numbers (text string) |
| Logical | True (.T.) Or False (.F.) |
| Date | Date |
| DateTime | Date and Time |
| Currency | Monetary. Numbers only with 2 decimal places |
| Memo | Character text or numbers (text string) of any length |

Width is the number of characters allowed in the field and Dec is the number of places right of a decimal place. If Dec is blank, no decimals are allowed in the field.

***Tip:*** *To explore a table and see example entries use the Query Manager and do a "Select * From <table name>". For example, SELECT * FROM HOUSE*

Structure for table: ACCOUNT.DBF (Giving Account names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACCOUNT | Character | 40 | | Account name |
| 2 | RECEIPTABL | Logical | 1 | | True if receiptable account |
| 3 | DATE_CREAT | Date | 8 | | Date created |
| 4 | COMMENT | Character | 55 | | Comments |
| 5 | NUMBER | Numeric | 7 | | Account Number |
| 6 | GOAL | Currency | 8 | 2 | Target or goal |
| 7 | DEPOSIT | Character | 50 | | Deposit name |
| 8 | EXPORT_NUM | Numeric | 7 | | Simply Accounting Export Account Number |
| 9 | RAPID_CODE | Numeric | 7 | | Rapid Entry Code |

Structure for table: ACTIVE_E.DBF (Active Events and classes)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Active Event ID |
| 2 | EVENT_ID | Numeric | 5 | | Event ID |
| 3 | CLASS_ID | Numeric | 4 | | Class ID |
| 4 | FROM_DATE | DateTime | 8 | | From date/time |
| 5 | TO_DATE | DateTime | 8 | | To date/time |
| 6 | PUBLISH | Logical | 1 | | True if published to calendars |
| 7 | EXCLUDE | Logical | 1 | | True to exclude occurrence from conflict checks |
| 8 | SEQUENCE | Numeric | 3 | | Proprietary |

Structure for table: ATND_SUM.DBF (Attendance summary records)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Active Event ID |
| 2 | ATTENDANCE | Numeric | 7 | | Attendance summary total |
| 3 | MEMBTYPE | Character | 20 | | For this membership type |

Structure for table: ATTEND.DBF (Detailed attendance)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Active event ID |
| 2 | PER_ID | Numeric | 5 | | Person ID |
| 3 | PRESENT | Logical | 1 | | True if person present |
| 4 | EXCUSED | Logical | 1 | | True if person excused |
| 5 | SICK | Logical | 1 | | True if person sick |

Structure for table: BATCH.DBF (Giving batch information)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | BATCH_ID | Character | 6 | | Batch ID |
| 2 | DATE_GIVEN | Date | 8 | | Batch date |
| 3 | DESIGNATOR | Character | 50 | | Batch name |
| 4 | PRE_TOTAL | Currency | 8 | 2 | Batch pre-calculated total |
| 5 | COMMENT | Character | 40 | | Free form comment |
| 6 | LOCKED | Logical | | | True if this batch is locked |

Structure for table: BIBLES.DBF (Bible translations)

*** PROPRIETARY ***

Structure for table: CALL_LOG.DBF (Dialer call log)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | UID | Character | 50 | | Internal user ID |
| 2 | CALL_DATE | DateTime | 8 | | Date of the call |
| 3 | CALLED | Character | 40 | | Who was called |
| 4 | NUMBER | Character | 30 | | Phone number called |

Structure for table: C_NOTES.DBF

*** PROPRIETARY ***

Structure for table: DATENAME.DBF (User defined date names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | DATE_ID | Numeric | 5 | | Date ID |
| 2 | NAME | Character | 50 | | Name for the date type |

Structure for table: DATES.DBF (User defined date values)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | PER_ID | Numeric | 6 | | Person ID |
| 2 | DATE_ID | Numeric | 5 | | Date ID |
| 3 | DATE | Date | 8 | | Date value |

Structure for table: DEPOSIT.DBF (Deposit account names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | DEPOSIT | Character | 50 | | Deposit account name |

Structure for table: DISTRICT.DBF (Areas and district names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | AREA_ID | Numeric | 6 | | Area ID |
| 2 | NAME | Character | 50 | | Name for the area/district |

Structure for table: EMAIL_NOTI.DBF

*** PROPRIETARY ***

Structure for table: EVENTS.DBF (Event descriptions)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | EVENT_ID | Numeric | 5 | | Event ID |
| 2 | EVENT_NAME | Character | 50 | | Event name |
| 3 | OCCURS | Numeric | 2 | | Occurs type: |
| | | | | | 1 = occurs once |
| | | | | | 2 = Every <day of week> |
| | | | | | 3 = Every x days |
| | | | | | 4 = Once a month on day x |
| | | | | | 5 = Every xth <day> |
| | | | | | 6 = xth <day> of the month |
| 4 | FROM_DATE | DateTime | 8 | | Event's start date/time |
| 5 | TO_DATE | DateTime | 8 | | Event's end date/time |
| 6 | REMINDER | Logical | 1 | | True if reminder required |
| 7 | REMINDTIME | Numeric | 5 | | Remind minutes before event |
| 8 | REOCCUR_P1 | Numeric | 2 | | Recurring parameter for type |
| | | | | | Type1 N/A |
| | | | | | Type2 day of week |
| | | | | | (Sunday = 1) |
| | | | | | Type3 number of days |
| | | | | | Type4 day # of month |
| 9 | OCCURUNTIL | Date | 8 | | Date event recurs until |
| 10 | DESCRIPT | Memo | 4 | | Description of event |
| 11 | PUBLISH | Logical | 1 | | .T. to publish in calendars |
| 12 | REOCCUR_P2 | Numeric | 2 | | Recurring parameter for type |
| | | | | | Type5 day of week |
| | | | | | Type6 day of week |
| 13 | EXCLUDE | Logical | 1 | | .T. to exclude from conflict checking |
| 14 | EMAILFAM | Logical | 1 | | .T. to email family address |
| 15 | EMAILHOME | Logical | 1 | | .T. to email home address |
| 16 | EMAILWORK | Logical | 1 | | .T. to email work address |
| 17 | EMAILCOPY | Logical | 1 | | .T. to email church address |
| 18 | EMAILHOW | Numeric | 3 | | Email method |
| | | | | | 1 = one address at a time |
| | | | | | 2 = using TO |
| | | | | | 3 = using BCC |
| 19 | EMAILBATCH | Numeric | 3 | | Number of recipients at once |
| 20 | PRIVATE | Logical | 1 | | .T. if private event |
| 21 | UID | Character | 50 | | User id that created event |
| 22 | INC_DESC | Logical | 1 | | .T. to include description |

Structure for table: EV_TASKS.DBF (Event tasks assigned to people)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Occurrence ID |
| 2 | PER_ID | Numeric | 6 | | Person ID |
| 3 | COMPLETE | Logical | 1 | | True if tasks completed |
| 4 | TASK | Memo | 4 | | Tasks assigned to person |
| 4 | SEQ_NO | Numeric | 3 | | Used for PDA exports |
| 4 | COMPTIME | DateTime | 8 | | Completion date/time |
| 4 | FROM_DATE | DateTime | 8 | | Duration from date/time |
| 4 | TO_DATE | DateTime | 8 | | Duration to date/time |

Structure for table: FACILITY.DBF (Facilities assigned to events)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Occurrence ID |
| 2 | FAC_ID | Numeric | 5 | | Facility ID |

Structure for table: FAC_TYPE.DBF (Facility type names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | FAC_ID | Numeric | 5 | | Facility ID |
| 2 | NAME | Character | 50 | | Facility name |
| 3 | DATE_CREAT | Date | 8 | | Date created |
| 4 | COMMENT | Character | 50 | | Comments |

Structure for table: FONEBOOK.DBF (Phone dialer phone books)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | NAME | Character | 75 | | Person or business name |
| 2 | TYPE | Character | 15 | | Type of entry |
| 3 | PHONE_NUM | Character | 30 | | Phone number |
| 4 | UID | Character | 50 | | User ID |

Structure for table: GIVING.DBF (Giving and pledge records)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ENVELOPE_N | Numeric | 10 | | Emvelope number |
| 2 | FAMILY_ID | Numeric | 5 | | Family ID |
| 3 | PER_ID | Numeric | 6 | | Person ID |
| 4 | FIRST_NAME | Character | 15 | | First name |
| 5 | MIDDLE_NAM | Character | 20 | | Middle name |
| 6 | FAMILY_NAM | Character | 40 | | Family name |
| 7 | ACCOUNT | Character | 40 | | Giving account name |
| 8 | AMOUNT | Currency | 8 | 2 | Amount of offering/pledge |
| 9 | DATE_GIVEN | Date | 8 | | Date offering was given |
| 10 | RECEIPTABL | Logical | 1 | | True if receiptable |
| 11 | RECEIPT_PR | Logical | 1 | | True if receipt printed |
| 12 | COMMENT | Character | 40 | | Comments |
| 13 | RECEIPTN | Numeric | 6 | | Tax Receipt number |
| 14 | GTYPE | Numeric | 1 | | Giving Type:<br>1=Check<br>2=Cash<br>3=Credit Card<br>4=Gift-In-Kind<br>5=Direct Deposit<br>6=P.A.R.<br>7=other |
| 15 | CHECK_NO | Character | 10 | | Check # if check |
| 16 | EXPORTDATE | Date | 8 | | Date record was exported using the Export Manager |
| 17 | BATCH_ID | Character | 6 | | Batch ID |
| 18 | RCPT_DATE | Date | 8 | | Date tax receipt created |
| 19 | SPLIT_ID | Numeric | 5 | | Split ID if split offering |
| 20 | APPR_ID | Numeric | 5 | | Appraiser ID |
| 21 | ADVANTAGE | Currency | 8 | 2 | Advantage amount |

Structure for table: GROUPS.DBF (People assigned to a group)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | GRP_ID | Numeric | 5 | | Group ID |
| 2 | PER_ID | Numeric | 5 | | Person ID |

Structure for table: GROUP_INTEREST.DBF (People interested in a group)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | PER_ID | Numeric | 5 | | Person ID |
| 2 | GRP_ID | Numeric | 5 | | Group ID (See GRP_TYP table) |

Structure for table: GRP_FOLDERS.DBF (Group folder names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | GGID | Numeric | 10 | | Group Folder ID |
| 2 | NAME | Character | 100 | | Folder name |

Structure for table: GRP_TYPE.DBF (Church group names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | GRP_ID | Numeric | 5 | | Group ID |
| 2 | NAME | Character | 50 | | Group name |
| 3 | DATE_CREAT | Date | 8 | | Date created |
| 4 | COMMENT | Character | 50 | | Comments |
| 5 | GGID | Numeric | 10 | | Group Folder ID |
| 6 | NOTES | Memo | | | Free form notes/minutes |

Structure for table: HOUSE.DBF (House table, address information)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | FAMILY_ID | Numeric | 5 | | Family ID |
| 2 | FAMILY_NAM | Character | 40 | | Family name |
| 3 | ADDRESS1 | Character | 40 | | Address field #1 |
| 4 | ADDRESS2 | Character | 40 | | Address field #2 |
| 5 | CITY | Character | 30 | | City |
| 6 | PROV | Character | 2 | | State or province |
| 7 | POSTAL_COD | Character | 12 | | Zip or postal code |
| 8 | HOUSPHONE1 | Character | 30 | | Main household phone #1 |
| 9 | DIRECTORY | Logical | 1 | | True if family in directory |
| 10 | PCAPTION | Character | 60 | | Photo caption |
| 11 | COUNTRY | Character | 40 | | Country name |
| 12 | ALT_ADDR1 | Character | 40 | | Alternate address field #1 |
| 13 | ALT_CITY | Character | 30 | | Alternate city |
| 14 | ALT_PROV | Character | 2 | | Alternate state or province |
| 15 | ALT_CNTRY | Character | 40 | | Alternate country name |
| 16 | ALT_POSTAL | Character | 12 | | Alternate zip or pcode |
| 17 | ALT_PHONE | Character | 30 | | Alternate phone #1 |
| 18 | ALT_ADDR2 | Character | 40 | | Alternate address field #2 |
| 19 | HOUSPHONE2 | Character | 30 | | Main household phone #2 |
| 20 | ALT_PHONE2 | Character | 30 | | Alternate phone #2 |
| 21 | H_USR_C1 | Character | 30 | | User character field #1 |
| 22 | H_USR_C2 | Character | 30 | | User character field #2 |
| 23 | H_USR_CHK1 | Logical | 1 | | User checkbox #1 |
| 24 | H_USR_CHK2 | Logical | 1 | | User checkbox #2 |
| 25 | H_USR_N1 | Numeric | 7 | | User numeric field #1 |
| 26 | H_USR_N2 | Numeric | 7 | 2 | User numeric field #2 |
| 27 | PUBLISH | Numeric | 1 | | Publishing levels:<br>1 = No restrictions<br>2 = Name and Address<br>3 = Name and Phone<br>4 = Publish Name Only |
| 28 | TYPE | Numeric | 1 | | Type of record:<br>1 = Church Family<br>2 = Temporary Giver<br>3 = Contact<br>4 = Vendor |
| 29 | EMAIL | Character | 40 | | Email |
| 30 | ALT_EMAIL | Character | 40 | | Alternate Email |
| 31 | ID_LEVEL | Character | 40 | | Proprietary field |
| 32 | MAILBOX | Character | 6 | | Church mail box |
| 33 | QUICKSRCH | Character | 55 | | Driver for QuickSearch list |
| 34 | FAM_NOTES | Memo | | | Family Notes |
| 35 | PUB_EMAIL | Logical | 1 | | True if OK to publish email |
| 36 | INC_SPOUSE | Logical | 1 | | True if spouse name is to be |

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| | | | | | included on tax receipts |
| 37 | AREA_ID | Numeric | 6 | | Area ID (see district table) |
| 38 | INACTIVE | Logical | | | True if family is inactive |
| 39 | NO_CONTACT | Logical | | | True if not to contact |
| 40 | HOW_HEARD | Character | 20 | | How they heard |

Structure for table: HOWTHEYHEARD.DBF (How They Heard of Your Church)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | NAME | Character | 20 | | Text for how heard |

Structure for table: HYMNS.DBF (Hymn lyrics)

*** PROPRIETARY ***

Structure for table: LIBRARY.DBF (Library Manager items)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ITEM_ID | Numeric | 7 | | Item ID |
| 2 | DATE_CREAT | Date | 8 | | Date created |
| 3 | TITLE | Character | 50 | | Title |
| 4 | AUTHOR | Character | 40 | | Author |
| 5 | IDENTIFIER | Character | 20 | | Identifier (eg ISBN) |
| 6 | LOCATION | Character | 20 | | Location of item |
| 7 | PUB_DATE | Date | 8 | | Publication date |
| 8 | TYPE | Character | 10 | | Type of item<br>1 = Book<br>2 = Cassette<br>3 = CD<br>4 = DVD<br>5 = Magazine<br>6 = Newspaper<br>7 = Video<br>8 = Other |
| 9 | KEYWORDS | Character | 254 | | Keywords for search |
| 10 | DESCRIPT | Memo | 4 | | Description |
| 11 | ON_LOAN | Logical | 1 | | TRUE if on loan |
| 12 | ON_LOAN_TO | Numeric | 6 | | On loan to who? |
| 13 | DUE_BACK | Date | 8 | | Date due back |
| 14 | PUBLISHER | Character | 50 | | Publisher name |
| 15 | OWNER | Character | 50 | | Owner name |
| 16 | VALUE | Currency | | | Monetary value |
| 17 | CALL_NUM | Character | 15 | | Call number |
| 18 | ISBN | Character | 17 | | ISBN number |
| 19 | SERIES | Logical | | | True if this is in a series |
| 20 | B_PERIOD | Numeric | 5 | | Borrow period in days |
| 21 | NOTIFIED | Logical | | | True if notified of overdue |
| 22 | B_COUNT | Numeric | 6 | | Number of times item borrowed |

Structure for table: LIB_HIST.DBF (Library item history)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | PER_ID | Numeric | 6 | | Person ID |
| 2 | ITEM_ID | Numeric | 7 | | Item ID |
| 3 | BORROWED | Date | 8 | | Borrow date |
| 4 | RETURNED | Date | 8 | | Return date |

Structure for table: MAIL_M.DBF (Form letters and bulk emails)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | LAST_MOD | DateTime | 8 | | Last time form let. modified |
| 2 | NAME | Character | 40 | | Name of form letter |
| 3 | LETTER | Memo | | | Form letter body |
| 4 | HEAD_FILE | Character | 200 | | Path to header .BMP file |
| 5 | SIG_FILE | Character | 200 | | Path to footer .BMP file |
| 6 | PRINT_NAME | Character | 40 | | Name to print for signature |
| 7 | ENABLE_HD | Logical | 1 | | True if header enabled |
| 8 | ENABLE_SIG | Logical | 1 | | True if footer enabled |
| 9 | SUBJECT | Character | 100 | | Subject (for email) |

Structure for table: MEMBTYPE.DBF (Membership type names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | MEMB_ID | Numeric | 5 | | Membership Type ID |
| 2 | NAME | Character | 20 | | Membership name |
| 3 | DATE_CREAT | Date | 8 | | Date created |
| 4 | COMMENT | Character | 50 | | Comments |

Structure for table: MINUTES.DBF (Meeting minutes - Schedule Mgr)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Active Event ID |
| 2 | MINUTES | Memo | | | Meeting minutes |

Structure for table: MM_LIST_DATA.DBF (Data for lists stored in Mail Manager)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | LIST_ID | Numeric | 10 | | Unique List ID |
| 2 | PER_ID | Numeric | 6 | | Person ID if people list |
| 3 | FAMILY_ID | Numeric | 5 | | Family ID if family list |

Structure for table: MM_LIST_NAMES.DBF (Names of lists stored in Mail Manager)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | LIST_ID | Numeric | 10 | | Unique List ID |
| 2 | NAME | Character | 60 | | List name |
| 3 | DESCRIPT | Memo | | | Description of the list |
| 4 | TYPE | Character | 1 | | “F”=family list “P”=people list |

Structure for table: MSGS.DBF
*** PROPRIETARY ***

Structure for table: MSTATUS.DBF (Marital status types)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | STATUS | Character | 10 | | Marital Status |

Structure for table: NAMETAGS.DBF (Saved name tags)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | TAG_ID | Numeric | 10 | | Name tag ID |
| 2 | TITLE | Character | 50 | | Tag title |
| 3 | TEXT1 | Character | 50 | | Text line 1 |
| 4 | TEXT2 | Character | 50 | | Text line 2 |
| 5 | TEXT3 | Character | 50 | | Text line 3 |
| 6 | LABELINDEX | Numeric | 2 | | Index of label stock used |
| 7 | NOTES | Memo | | | Free form notes |

Structure for table: NETWORK.DBF
*** PROPRIETARY ***

Structure for table: ND_TYPE.DBF (Special need names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | NEED_ID | Numeric | 5 | | Special need ID |
| 2 | NAME | Character | 50 | | Special need name |
| 3 | DATE_CREAT | Date | 8 | | Date created |
| 4 | COMMENT | Character | 50 | | Comments |

Structure for table: NEEDS.DBF (Special needs assigned to people)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | NEED_ID | Numeric | 5 | | Special need ID |
| 2 | PER_ID | Numeric | 5 | | Person ID |

Structure for table: PARISH.DBF (Church/Database Names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | C_NAME | Character | 70 | | Church Name |
| 2 | FOLDER | Character | 70 | | Folder containing data |
| 3 | ADDRESS1 | Character | 40 | | Church address |
| 4 | ADDRESS2 | Character | 40 | | Chruch address |
| 5 | CITY | Character | 40 | | Church city |
| 6 | PROV | Character | 2 | | Province or State |
| 7 | COUNTRY | Character | 40 | | Church country |
| 8 | ZIP | Character | 12 | | ZIP or postal code |
| 9 | PHONE | Character | 30 | | Church phone |
| 10 | FAX | Character | 30 | | Church fax |
| 11 | EMAIL | Character | 50 | | Church email |
| 12 | WEB_PAGE | Character | 50 | | Church web page |
| 13 | CHARITY | Character | 20 | | Charitable Registration # |
| 14 | LOGO_FILE | Character | 100 | | Church logo filename |
| 15 | DEF_CAT | Character | 40 | | Default catagory |
| 16 | SIG_FILE | Character | 100 | | Signature filename |
| 17 | SIG_TEXT | Character | 50 | | Text for digital signature |
| 18 | DEF_ZIP | Character | 12 | | Default postal code |
| 19 | BACKUPPATH | Character | 100 | | Default backup path |
| 20 | LAST_BACK | DateTime | 8 | | Last backup date |
| 21 | F_YEAR_END | Date | 8 | | Fiscal year end date |
| 22 | PASTOR | Character | 50 | | Pastor/Reverand name |

Structure for table: PEOPLE.DBF (People details)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | FAMILY_ID | Numeric | 5 | | Family ID |
| 2 | PER_ID | Numeric | 6 | | Person ID |
| 3 | FAMILY_NAM | Character | 40 | | Family name |
| 4 | FIRST_NAME | Character | 15 | | First name |
| 5 | MIDDLE_NAM | Character | 20 | | Middle name |
| 6 | SEX | Character | 1 | | Gender (“M” or “F”) |
| 7 | BIRTHDATE | Date | 8 | | Birthdate |
| 8 | OCCUPATION | Character | 40 | | Occupation |
| 9 | MEMBERDATE | Date | 8 | | Membership date |
| 10 | RECORD_LEV | Numeric | 5 | | Authority:<br>1 = Main Contact<br>2 = Spouse<br>3 = Child<br>4 = Other |
| 11 | ENVELOPE_N | Numeric | 10 | | Envelope number |
| 12 | WORKPHONE | Character | 30 | | Work phone |
| 13 | EMPLOYER | Character | 50 | | Employer name |
| 14 | FAX | Character | 30 | | Fax number |

| | | | | | |
|---|---|---|---|---|---|
| 15 | EMAIL | Character | 40 | | EMail address (home) |
| 16 | NOTES | Memo | | | Person’s notes |
| 17 | EXTENSION | Character | 5 | | Work phone extension |
| 18 | CELLULAR | Character | 30 | | Cellular phone number |
| 19 | PHONE1 | Character | 30 | | User phone #1 |
| 20 | PHONE2 | Character | 30 | | User phone #2 |
| 21 | EMAIL_WORK | Character | 40 | | Email address (work) |
| 22 | ANNIV | Date | 8 | | Anniversary date |
| 23 | DEATH | Date | 8 | | Date of death |
| 24 | MEMBER | Character | 20 | | Membership level |
| 25 | YN_MEMB | Logical | 1 | | True if member |
| 26 | YN_DEATH | Logical | 1 | | True if deceased |
| 27 | MAIDENNAME | Character | 40 | | Maiden name |
| 28 | STATUS | Character | 10 | | Marital status |
| 29 | USER_C1 | Character | 30 | | User character field #1 |
| 30 | USER_C2 | Character | 30 | | User character field #2 |
| 31 | USER_C3 | Character | 30 | | User character field #3 |
| 32 | USER_CHK1 | Logical | 1 | | User checkbox #1 (True/False) |
| 33 | USER_CHK2 | Logical | 1 | | User checkbox #2 (True/False) |
| 34 | USER_CHK3 | Logical | 1 | | User checkbox #3 (True/False) |
| 35 | USER_N1 | Numeric | 7 | | User numeric field #1 |
| 36 | USER_N2 | Numeric | 7 | | User numeric field #2 |
| 37 | USER_N3 | Numeric | 7 | 2 | User numeric field #3 |
| 38 | USER_C4 | Character | 30 | | User character field #4 |
| 39 | USER_C5 | Character | 30 | | User character field #5 |
| 40 | USER_C6 | Character | 30 | | User character field #6 |
| 41 | TITLE | Character | 15 | | Person’s title (Mr., Mrs...) |
| 42 | PREFERRED | Character | 15 | | Preferred name |
| 43 | PROSPECT | Logical | 1 | | True if person is prospect |
| 44 | PDIRECTORY | Logical | 1 | | True if person in directory |
| 45 | FATHER | Numeric | 6 | | Person ID of father |
| 46 | MOTHER | Numeric | 6 | | Person ID of mother |
| 47 | ID_LEVEL | Character | 80 | | Proprietary field |
| 48 | WEB_PAGE | Character | 40 | | Personal web page URL |
| 49 | QUICKSRCH | Character | 75 | | Driver for QuickSearch list |
| 50 | PUB_WEMAIL | Logical | 1 | | True to publish work email |
| 51 | PUB_HEMAIL | Logical | 1 | | True to publish home email |
| 52 | PUB_AGE | Logical | 1 | | True to publish age |
| 53 | LOAD_LAST | Logical | 1 | | True to load last giving |
| 54 | VISITOR | Logical | 1 | | True if person is a visitor |
| 55 | LAST_ENV | Numeric | 10 | | Last year’s envelope # |
| 56 | NEXT_ENV | Numeric | 10 | | Next year’s envelope # |
| 56 | STAFF | Logical | 1 | | True if person is on staff |
| 56 | LIFE_VERSE | Character | 20 | | Life verse |
| 56 | ROLL | Numeric | 10 | | Roll # |

Structure for table: PEOP_REQ.DBF (People required at an event)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Occurrence ID |
| 2 | PER_ID | Numeric | 5 | | Person ID |

Structure for table: PLEDGES.DBF (Pledges)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | PLEDGEDATE | Date | 8 | | Pledge start date |
| 2 | FAMILY_ID | Numeric | 5 | | Family ID |
| 3 | PER_ID | Numeric | 6 | | Person ID |
| 4 | AMOUNT | Currency | 8 | 2 | Amount |
| 5 | ACCOUNT | Character | 40 | | Account |
| 6 | FREQUENCY | Numeric | 1 | | Frequency<br>1 = Weekly<br>2 = Bi-weekly<br>3 = Monthly<br>4 = Yearly |
| 7 | END_DATE | Date | 8 | | Pledge end date |
| 8 | COMMENT | Character | 50 | | Comment |

Structure for table: QUERIES.DBF (Saved queries from Query Manager)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | NAME | Character | 50 | | Query name |
| 2 | DESCRIPT | Memo | | | Description of query |
| 3 | QUERY | Memo | | | Query (SQL command) |

Structure for table: RECEIPT.DBF (Last receipt number)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | LAST_RECPT | Numeric | 10 | | Last receipt number |

Structure for table: REPORTS.DBF
*** PROPRIETARY ***

Structure for table: REP_FAVS.DBF
*** PROPRIETARY ***

Structure for table: REP_USER.DBF
*** PROPRIETARY ***

Structure for table: RESERVES.DBF (People reserving a library item)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ITEM_ID | Numeric | 7 | | Unique Item ID |
| 2 | PER_ID | Numeric | 6 | | Person ID if people list |
| 3 | R_DATE | DateTime | | | Date of reservation |
| 4 | SEND_EMAIL | Logical | | | True if email notification |
| 5 | NOTIFIED | Logical | | | True if person notified |

Structure for table: RESOURCE.DBF (Resources assigned to events)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Occurrence ID |
| 2 | RES_ID | Numeric | 5 | | Resource ID |

Structure for table: RES_TYPE.DBF (Resource names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | RES_ID | Numeric | 5 | | Resource ID |
| 2 | NAME | Character | 50 | | Resource name |
| 3 | DATE_CREAT | Date | 8 | | Date created |
| 4 | COMMENT | Character | 50 | | Comments |
| 5 | ASSET_NO | Character | 12 | | Asset number |
| 6 | MAKER | Character | 30 | | Manufacturer |
| 7 | MODEL | Character | 15 | | Model number |
| 8 | SERIAL_NO | Character | 15 | | Serial number |
| 9 | PUR_BY | Character | 20 | | Purchased by (name) |
| 10 | PUR_DATE | Date | 8 | | Purchase date |
| 11 | PUR_PRICE | Currency | 8 | 2 | Purchase price |
| 12 | VENDOR | Memo | | | Vendor name and address |
| 13 | WARRANTY | Date | 8 | | Date warranty expires |
| 14 | SALE_DATE | Date | 8 | | Sale date |
| 15 | SALE_PRICE | Currency | 8 | 2 | Sale price (if sold) |
| 16 | SOLD_TO | Memo | | | Who sold to name and address |
| 17 | BORROWEDBY | Numeric | 6 | | Person ID who borrowed |
| 18 | BORROWDATE | Date | 8 | | Date resource borrowed |
| 19 | SUPPORTEXP | Date | 8 | | Date support expires |

Structure for table: RG_BAPT.DBF (Baptism Register)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | RG_ID | Numeric | 10 | | Register ID |
| 2 | FAMILY_NAM | Character | 40 | | Family name |
| 3 | FIRST_NAME | Character | 30 | | First name |
| 4 | MIDDLE_NAM | Character | 20 | | Middle name |
| 5 | CERT_NAME | Character | 50 | | Name on Certificate |
| 6 | FATHER | Character | 50 | | Father’s name |
| 7 | MOTHER | Character | 50 | | Mother’s name |
| 8 | SPONSER1 | Character | 50 | | Sponser’s name |
| 9 | SPONSER2 | Character | 50 | | Sponser’s name |
| 10 | REVEREND | Character | 50 | | Pastor’s name |
| 11 | BIRTHDATE | Date | 8 | | Date of birth |
| 12 | BAPTDATE | Date | 8 | | Date of baptism |
| 13 | CONFDATE | Date | 8 | | Date of confirmation |
| 14 | MARRDATE | Date | 8 | | Date of marriage |
| 15 | BIRTHPLACE | Character | 50 | | Place of birth |
| 16 | BAPTPLACE | Character | 50 | | Place of baptism |
| 17 | HOME_LOC | Character | 50 | | Home location |
| 18 | CONF_NOTES | Memo | | | Confirmation notes |
| 19 | MARR_NOTES | Memo | | | Marriage notes |
| 20 | OTHR_NOTES | Memo | | | Other notes |
| 21 | LOCL_NOTES | Memo | | | Local notes |
| 22 | F_LINK | Numeric | 10 | | RG_ID of father |
| 23 | M_LINK | Numeric | 10 | | RG_ID of mother |

Structure for table: RG_BAPT_LIST.DBF (Place of baptism list)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | BAPTPLACE | Character | 50 | | Place of baptism |

Structure for table: RG_BORN_LIST.DBF (Place of birth)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | BIRTHPLACE | Character | 50 | | Place of baptism |

Structure for table: RG_BURY_LIST.DBF (Place of burial)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | BURYPLACE | Character | 50 | | Place of burial |

Structure for table: RG_CONF.DBF (Confirmation Register)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | RG_ID | Numeric | 10 | | Register ID |
| 2 | FAMILY_NAM | Character | 40 | | Family name |
| 3 | FIRST_NAME | Character | 30 | | First name |
| 4 | MIDDLE_NAM | Character | 20 | | Middle name |
| 5 | CERT_NAME | Character | 50 | | Name on Certificate |
| 6 | FATHER | Character | 50 | | Father’s name |
| 7 | MOTHER | Character | 50 | | Mother’s name |
| 8 | BIRTHDATE | Date | 8 | | Date of birth |
| 9 | BAPTDATE | Date | 8 | | Date of baptism |
| 10 | BAPTPLACE | Character | 50 | | Place of baptism |
| 11 | SPONSER1 | Character | 50 | | Sponser’s name |
| 12 | SPONSER2 | Character | 50 | | Sponser’s name |
| 13 | REVEREND | Character | 50 | | Pastor’s name |
| 14 | CONFDATE | Date | 8 | | Date of confirmation |
| 15 | PARISH | Character | 50 | | Church where confirmed |
| 16 | CONF_NOTES | Memo | | | Confirmation notes |
| 17 | LOCL_NOTES | Memo | | | Local notes |

Structure for table: RG_DEATH.DBF (Death Register)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | RG_ID | Numeric | 10 | | Register ID |
| 2 | FAMILY_NAM | Character | 40 | | Family name |
| 3 | FIRST_NAME | Character | 30 | | First name |
| 4 | MIDDLE_NAM | Character | 20 | | Middle name |
| 5 | PARENTS_SP | Character | 50 | | Parents or spouse name |
| 6 | BIRTHDATE | Date | 8 | | Date of birth |
| 7 | DEATHDATE | Date | 8 | | Date of death |
| 8 | BURYDATE | Date | 8 | | Date of burial |
| 9 | BURYPLACE | Character | 50 | | Place of burial |
| 10 | REVEREND | Character | 50 | | Pastor’s name |
| 11 | PARISH | Character | 50 | | Church name |
| 12 | DEATHNOTES | Memo | | | Death notes |
| 13 | LOCL_NOTES | Memo | | | Local notes |
| 14 | F_LINK | Numeric | 10 | | RG_ID of father |
| 15 | M_LINK | Numeric | 10 | | RG_ID of mother |

Structure for table: RG_FC.DBF (First Communion Register)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | RG_ID | Numeric | 10 | | Register ID |
| 2 | FAMILY_NAM | Character | 40 | | Family name |
| 3 | FIRST_NAME | Character | 30 | | First name |
| 4 | MIDDLE_NAM | Character | 20 | | Middle name |
| 5 | CERT_NAME | Character | 50 | | Name on Certificate |
| 6 | FATHER | Character | 50 | | Father’s name |
| 7 | MOTHER | Character | 50 | | Mother’s name |
| 8 | REVEREND | Character | 50 | | Pastor’s name |
| 9 | BIRTHDATE | Date | 8 | | Date of birth |
| 10 | BAPTDATE | Date | 8 | | Date of baptism |
| 11 | FCDATE | Date | 8 | | Date of first communion |
| 12 | BIRTHPLACE | Character | 50 | | Place of birth |
| 13 | BAPTPLACE | Character | 50 | | Place of baptism |
| 14 | PARISH | Character | 50 | | Church name |
| 15 | FC_NOTES | Memo | | | First Communion notes |
| 16 | LOCL_NOTES | Memo | | | Local notes |

Structure for table: RG_HOME_LIST.DBF (Registers home location list)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | HOME_LOC | Character | 50 | | Home location |

Structure for table: RG_MARR.DBF (Marriage Register)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | RG_ID | Numeric | 10 | | Register ID |
| 2 | HFAMILYNAM | Character | 40 | | Husband's Family name |
| 3 | HFIRSTNAME | Character | 30 | | Husband's First name |
| 4 | HMIDDLENAM | Character | 20 | | Husband's Middle name |
| 5 | HFATHER | Character | 50 | | Husband's Father's name |
| 6 | HMOTHER | Character | 50 | | Husband's Mother's name |
| 7 | HBIRTHDATE | Date | 8 | | Husband's Date of birth |
| 8 | HBAPTDATE | Date | 8 | | Husband's Date of baptism |
| 9 | HBAPTPLACE | Character | 50 | | Husband's Place of baptism |
| 10 | WFAMILYNAM | Character | 40 | | Wife's Family name |
| 11 | WFIRSTNAME | Character | 30 | | Wife's First name |
| 12 | WMIDDLENAM | Character | 20 | | Wife's Middle name |
| 13 | WFATHER | Character | 50 | | Wife's Father's name |
| 14 | WMOTHER | Character | 50 | | Wife's Mother's name |
| 15 | WBIRTHDATE | Date | 8 | | Wife's Date of birth |
| 16 | WBAPTDATE | Date | 8 | | Wife's Date of baptism |
| 17 | WBAPTPLACE | Character | 50 | | Wife's Place of baptism |
| 18 | WITNESS1 | Character | 50 | | Witness name |
| 19 | WITNESS2 | Character | 50 | | Witness name |
| 20 | REVEREND | Character | 50 | | Pastor's name |
| 21 | MARR_DATE | Character | 50 | | Marriage date |
| 22 | PARISH | Character | 50 | | Church name |
| 23 | PROVSTATE | Character | 50 | | Province or state |
| 24 | MARR_NOTES | Memo | | | Marriage notes |
| 25 | LOCL_NOTES | Memo | | | Local notes |
| 26 | HPROFDATE | Date | 8 | | Wife's Date of profession |
| 27 | WPROFDATE | Date | 8 | | Wife's Date of profession |

Structure for table: RG_PROF.DBF (Profession of Faith Register)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | RG_ID | Numeric | 10 | | Register ID |
| 2 | FAMILY_NAM | Character | 40 | | Family name |
| 3 | FIRST_NAME | Character | 30 | | First name |
| 4 | MIDDLE_NAM | Character | 20 | | Middle name |
| 5 | CERT_NAME | Character | 50 | | Name on Certificate |
| 6 | FATHER | Character | 50 | | Father's name |
| 7 | MOTHER | Character | 50 | | Mother's name |
| 8 | WITNESS1 | Character | 50 | | Witness name |
| 9 | WITNESS2 | Character | 50 | | Witness name |
| 10 | REVEREND | Character | 50 | | Pastor's name |
| 11 | BIRTHDATE | Date | 8 | | Date of birth |
| 12 | BAPTDATE | Date | 8 | | Date of baptism |
| 13 | CONFDATE | Date | 8 | | Date of confirmation |
| 14 | MARRDATE | Date | 8 | | Date of marriage |
| 15 | BIRTHPLACE | Character | 50 | | Place of birth |
| 17 | HOME_LOC | Character | 50 | | Home location |
| 18 | CONF_NOTES | Memo | | | Confirmation notes |
| 19 | MARR_NOTES | Memo | | | Marriage notes |
| 20 | OTHR_NOTES | Memo | | | Other notes |
| 21 | LOCL_NOTES | Memo | | | Local notes |
| 21 | BAPT_NOTES | Memo | | | Baptism notes |
| 22 | PROFDATE | Date | 8 | | Date of profession of faith |
| 23 | PROFPLACE | Character | 50 | | Place of profession of faith |

Structure for table: RG_PROF_LIST.DBF (Place of prof. of faith list)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | PROFPLACE | Character | 50 | | Place of profession of faith |

Structure for table: RG_PRST_LIST.DBF (Registers priest list)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | REVEREND | Character | 50 | | Pastor name |

Structure for table: SERIES_FAC.DBF
*** PROPRIETARY ***

Structure for table: SERIES_PEOP.DBF
*** PROPRIETARY ***

Structure for table: SERIES_RES.DBF
*** PROPRIETARY ***

Structure for table: SERIES_TEACH.DBF
*** PROPRIETARY ***

Structure for table: SERMON.DBF (Sermons)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | SERMON_ID | Numeric | 6 | | Sermon ID |
| 2 | DATE_CREAT | Date | 8 | | Date created |
| 3 | TITLE | Character | 50 | | Sermon title |
| 4 | FILENAME | Character | 100 | | Sermon filename |
| 5 | KEYWORDS | Character | 50 | | Sermon keywords |
| 6 | NOTES | Memo | | | Sermon notes |
| 7 | WRITTEN_BY | Character | 30 | | Person who wrote the sermon |

Structure for table: SERMON_DATES.DBF (Sermon dates)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | SERMON_ID | Numeric | 6 | | Sermon ID |
| 2 | DATE_GIVEN | Date | 8 | | Date given |
| 3 | COMMENT | Memo | | | Comments and notes |
| 4 | GIVEN_BY | Character | 30 | | Who gave the sermon |

Structure for table: SETUP.DBF
*** PROPRIETARY ***

Structure for table: SKILLS.DBF (Time and talents assigned to people)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | PER_ID | Numeric | 6 | | Person ID |
| 2 | FAMILY_ID | Numeric | 5 | | Family ID |
| 3 | TYPE | Character | 1 | | Time/Talent type (see below) |
| 4 | SKILL | Character | 40 | | Time/Talent name |

Structure for table: SKILTYPE.DBF (Time and talent names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | TYPE | Character | 1 | | Time/Talent type |
| 2 | SKILL | Character | 40 | | Time/Talent name |
| 3 | DATE_CREAT | Date | 8 | | Date created |

Structure for table: SL.DBF
*** PROPRIETARY ***

Structure for table: SPD_DIAL.DBF (Dialer speed dials)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | NAME | Character | 15 | | Name |
| 2 | PHONE_NUM | Character | 30 | | Phone number |
| 3 | UID | Character | 50 | | Internal user ID |

Structure for table: SS_ACHEV.DBF (Achieved classes assigned to people)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | PER_ID | Numeric | 6 | | Person ID |
| 2 | CLASS_NAME | Character | 40 | | Class name |
| 3 | ACHEV_DATE | Date | 8 | | Date class achieved |

Structure for table: SS_AWARD.DBF (Awards assigned to people)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | PER_ID | Numeric | 6 | | Person ID |
| 2 | AWARD_ID | Numeric | 4 | | Award ID |
| 3 | AWARD_DATE | Date | 8 | | Date awarded |

Structure for table: SS_AWTYP.DBF (Class award names)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | AWARD_ID | Numeric | 4 | | Award ID |
| 2 | AWARD_NAME | Character | 40 | | Award name |
| 3 | DATE_CREAT | Date | 8 | | Date created |
| 4 | COMMENT | Character | 50 | | Comments |

Structure for table: SS_CLASS.DBF (Class descriptions)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | CLASS_ID | Numeric | 4 | | Class ID |
| 2 | CLASS_NAME | Character | 50 | | Class name |
| 3 | START_TIME | DateTime | 8 | | Class start time and date |
| 4 | END_TIME | DateTime | 8 | | Class end time and date |
| 5 | OCCURS | Numeric | 1 | | Occurs type: |
| | | | | | 1 = occurs once |
| | | | | | 2 = Every <day of week> |
| | | | | | 3 = Every x days |
| | | | | | 4 = Once a month on day x |
| | | | | | 5 = Every xth <day> |
| | | | | | 6 = xth <day> of the month |
| 6 | REOCCUR_P1 | Numeric | 2 | | Recurring parameter for type |
| | | | | | Type1 N/A |
| | | | | | Type2 day of week |
| | | | | | (Sunday = 1) |
| | | | | | Type3 number of days |
| | | | | | Type4 day # of month |
| 7 | OCCURUNTIL | Date | 8 | | Date recurring stops |
| 8 | DESCRIPT | Memo | | | Description of class |
| 9 | PUBLISH | Logical | 1 | | .T. to publish in calendars |
| 10 | REOCCUR_P2 | Numeric | 2 | | Recurring parameter |
| | | | | | Type5 day of week |
| | | | | | Type6 day of week |
| 11 | EXCLUDE | Logical | 1 | | .T. to exclude from conflict checking |
| 12 | REMINDER | Logical | 1 | | True if reminder required |
| 13 | REMINDTIME | Numeric | 5 | | Remind minutes before event |
| 14 | EMAILFAM | Logical | 1 | | .T. to email family address |
| 15 | EMAILHOME | Logical | 1 | | .T. to email home address |
| 16 | EMAILWORK | Logical | 1 | | .T. to email work address |
| 17 | EMAILCOPY | Logical | 1 | | .T. to email church address |
| 18 | EMAILHOW | Numeric | 3 | | Email method |
| | | | | | 1 = one address at a time |
| | | | | | 2 = using TO |
| | | | | | 3 = using BCC |
| 19 | EMAILBATCH | Numeric | 3 | | Number of recipients at once |
| 20 | UID | Character | 50 | | User id that created event |
| 21 | INC_DESC | Logical | 1 | | .T. to include description |

Structure for table: SS_ENROL.DBF (People enrolled in classes)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Occurrence ID |
| 2 | PER_ID | Numeric | 6 | | Person ID (enrolled) |

Structure for table: SS_FAC.DBF (Facilities assigned to classes)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Occurrence ID |
| 2 | FAC_ID | Numeric | 5 | | Facility ID |

Structure for table: SS_NOTES.DBF
*** PROPRIETARY ***

Structure for table: SS_RES.DBF (Resources assigned to classes)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Occurrence ID |
| 2 | RES_ID | Numeric | 5 | | Resource ID |

Structure for table: SSTAUGHT.DBF (Classes people have taught)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | PER_ID | Numeric | 6 | | Person ID |
| 2 | CLASS_NAME | Character | 40 | | Class name |
| 3 | TEACH_DATE | Date | 8 | | Date person assigned teacher |

Structure for table: SSTASKS.DBF (Tasks for people @ classes)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | TASK_ID | Numeric | 10 | | Class Task ID |
| 2 | CLASS_ID | Numeric | 5 | | Class ID |
| 3 | TASK | Character | 50 | | Task |

Structure for table: TASKS.DBF (Tasks for people @ events)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | TASK_ID | Numeric | 10 | | Event Task ID |
| 2 | EVENT_ID | Numeric | 5 | | Event ID |
| 3 | TASK | Character | 50 | | Task |

Structure for table: TEACHERS.DBF (All current teachers)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | ACTIVE_EID | Numeric | 8 | | Occurrence ID |
| 2 | PER_ID | Numeric | 6 | | Person ID |

Structure for table: THEMES.DBF
*** PROPRIETARY ***

Structure for table: TITLES.DBF (Title types)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | TITLE | Character | 15 | | Title (Mr., Mrs. etc) |

Structure for table: TO_DO.DBF (To-Do List)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | UID | Character | 50 | | User ID |
| 2 | DESCRIPT | Character | 50 | | Description of to-do item |
| 3 | NOTES | Memo | 4 | | Notes |
| 4 | DUE_DATE | Date | 8 | | Due Date |
| 5 | DONE_DATE | Date | 8 | | Date to-do item completed |
| 6 | DONE | Logical | 1 | | True if to-do item completed |

Structure for table: USERS.DBF
*** PROPRIETARY ***

Structure for table: USERS_ONLINE.DBF
*** PROPRIETARY ***

Structure for table: VISIT.DBF (Visitation)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | VISIT_ID | Numeric | 10 | | Visit ID |
| 2 | PER_ID | Numeric | 10 | | Person ID of person being visited |
| 3 | VISITED_BY | Character | 50 | | Name of person doing visit |
| 4 | FROM_DATE | DateTime | | | Time visit is to/did start |
| 5 | TO_DATE | DateTime | | | Time visit is to/did end |
| 6 | PURPOSE | Character | 50 | | Purpose of the visit |
| 7 | METHOD | Numeric | 3 | | Visitation Method:<br>1 = In Person<br>2 = Phone<br>3 = Fax<br>4 = Mail<br>5 = Email<br>6 = Other |
| 8 | WHERE | Character | 20 | | Where visit occurred |
| 9 | STATE | Numeric | 3 | | State of visit:<br>1 = Scheduled<br>2 = Needs follow-up<br>3 = Closed |
| 10 | TYPE | Numeric | 3 | | Visitation type:<br>1 = First Time<br>2 = Followup |
| 11 | NOTES | Memo | | | Visitation notes |
| 12 | VB_PER_ID | Numeric | 10 | | Person id of person doing the visit |
| 13 | UID | Character | 50 | | User id that created visit |
| 14 | REMINDER | Logical | 1 | | True if reminder required |
| 15 | REMINDTIME | Numeric | 5 | | Remind minutes before event |
| 16 | EMAILFAM | Logical | 1 | | .T. to email family address |
| 17 | EMAILHOME | Logical | 1 | | .T. to email home address |
| 18 | EMAILWORK | Logical | 1 | | .T. to email work address |
| 19 | EMAILCOPY | Logical | 1 | | .T. to email church address |
| 20 | INC_DESC | Logical | 1 | | .T. to include description |
| 21 | SEQUENCE | Logical | 1 | | Used for PDA exports |

Structure for table: VISITOR.DBF (Visitors)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | PER_ID | Numeric | 7 | | Person ID |
| 2 | NEED_VISIT | Logical | 1 | | True if person needs visit |
| 3 | MEM_INTRST | Logical | 1 | | True if membership interest |
| 4 | NEEDPRAYER | Logical | 1 | | True if needs prayer |
| 5 | NO_CONTACT | Logical | 1 | | True if does not want contact |
| 6 | PRAYER | Memo | | | Details about prayer request(s) |

Structure for table: VISITOR_HISTORY.DBF (Visitation History)

| Field | Field Name | Type | Width | Dec | Description |
|---|---|---|---|---|---|
| 1 | VISIT_ID | Numeric | 10 | | Visit ID |
| 2 | PER_ID | Numeric | 10 | | Person ID |
| 3 | VISIT_DATE | Date | 8 | | Visit Date |
| 4 | CLASSEVENT | Character | 50 | | Class or event name |
| 5 | COMMENTS | Memo | | | Comments |

Structure for table: WIN_DATA.DBF

*** PROPRIETARY ***