

## **PowerChurch Plus Training Event**

### **Welcome!**

On behalf of Books in Order and PowerChurch Software we want to welcome and thank you for your investment of time, talent and treasurer in this training event. The provided laptops (minimum 1 per 2 attendees) are preloaded with a fully functional sample database. Please feel free to investigate the modules and you may enter and save your sample data throughout the training (laptops are restored at the conclusion of each training event.) Also, if you have brought your own notebook/laptop to this training, please allow one of our representatives to help you connect to the electrical power and internet.

The training agenda is applicable to versions 9, 10 and 11 of PowerChurch Plus software. If a software feature discussed is specific to a version, the seminar leader will highlight that area during the training. If you are considering purchasing a version upgrade, please ask about the discount offered to seminar attendees through Books in Order, Inc.

At the registration table, each attendee should have received a hard copy of the 3-day training workbook and a copy of our CDTools© product. The CD includes electronic copies of all seminar handouts, exercises and training materials. It also has various tools that we will use during the seminar including those developed by Books in Order to augment PowerChurch Plus features. There are also numerous templates designed to help with initial module data setup/design and the documentation of administrative and accounting controls and procedures helping to provide a roadmap of our work for those that come after us, as well as, helping to protect the church, staff and our volunteers.

Most importantly, remember that we are in this together! Our PowerChurch Plus training is comprehensive and interactive by design - so we encourage you to share your insights and wisdom on topics beneficial to your peers attending the class. However, to be mindful of our limited time together and to ensure the maximum training benefit for all attendees - we do ask that you use the provided workbooks to notate topical questions specific to your church database and/or use of PowerChurch Plus. Often, your question will be answered at some point in the session agenda, but if not, time is allotted for discussion and questions at the conclusion of each session. Also, there are two PowerChurch Plus experts available at each seminar to speak with you during breaks, lunch or at the conclusion of training. Please know that we are here to help you to get the most for your church from this powerful software tool - there are no silly questions except those that are left unasked!

We look forward to our time together!

Shalom,

Eric Herzog & Rev. Mike Srbljan

## Program Agenda

### ~Day One~

**Registration & Fellowship** (complimentary coffee, tea and beverages) *1:30 pm – 2:00 pm*

**Welcome, Giving Thanks & Program Overview** *2:00 pm*

#### **PowerChurch Plus Software – “Tools for Ministry”**

PowerChurch Plus is a feature rich, relational database. This session provides an overview of key system functions, support and security. Specific areas covered include user customization, database management and examples of how this relational database can be put to work for our ministry. Key topics include: desktop and online products functionality; the interdependence of modules; user groups, local partnerships and other (free) support available to users; database maintenance; system and user customization of each module; the importance and setup of system security; database backup and restore utilizing various media. Tools for the setup of a standalone and/or computer network installation in PowerChurch Plus (information sharing) are reviewed as are seldom revealed programs for significant discounts (faith-based organizations) for computer software, hardware and networking products.

#### **PowerChurch Plus Software – “Tips, Resources, and Recordkeeping Modules”**

This session will review several powerful yet, seldom recognized features and capabilities available for our use in PowerChurch Plus. Key topics include: benefits and use of keyboard commands; the user “tips” sheet; why, when and how to implement the Equipment Inventory, Music Library, Education Library and Sermon Filer modules within PowerChurch.

**15 Minute Break** (complimentary coffee, tea and beverages) *3:30 pm*

#### **Church Accounting for Non-Financial Professionals - “Don’t Build your House on Sand”**

The initial design and setup of PowerChurch Plus can be compared to the foundation of a house. All subsequent records management is built on top of that initial design. If the foundation is weak, the house will eventually crumble and possibly collapse. It is for this reason that we place such a great emphasis on a systematic and logical approach to understanding the basics of church accounting. With a solid foundation in place, the tools in PowerChurch Plus can help us to ensure transparency, enhance responsible stewardship and improve communications (and confidence) relating to church financial transactions. This session is focused less on the software and more on gaining insights into church fund accounting. The “what is”, “whys” and “how to” of restricted giving, payables processing, church payroll and fund accounting is discussed. This session has been thoughtfully prepared to take the mystery out of church fund accounting by helping non-financial people understand the accounting and administrative concepts, procedures and controls necessary to properly utilize the powerful tools in PowerChurch Plus to their fullest potential. Key topics include: basic internal controls for every church; fund accounting 101; designing and implementing the chart of accounts; double entry accounting (demystifying debit and credits); church budgeting; auditing; understating key financial reports and reporting levels of detail for your governing body and/or congregation.

**Blessing, Dinner & Fellowship** *5:30 pm*

#### **Dinner Presentation - “Are you Equipped to Process Payroll”**

There are few areas of our ministry together that generate more concern, questions and liability for the church than employee and contractor compensation issues. And yet, confusion and misinformation on this topic abound! Rev. Mike Sribljan presents a fun and informative session designed to equip you with the information, facts and caveats that are related to this important church function.

**Closing Remarks & Adjourn** *7:00 pm*

## ~Day Two~

**Registration & Fellowship** (complimentary coffee and beverages) *8:30 am – 9:00 am*

**Welcome, Giving Thanks & Program Overview** *9:00 am*

### **PowerChurch Plus Software –“Maintaining the Fund Accounting & Contributions Modules”**

Building upon the solid foundation of accounting fundamentals learned in the previous session, this session is focused on the initial contributions and accounting system setup and/or making adjustments to your existing database structures. PowerChurch Plus includes powerful features that help simplify the initial system setup as well as making adjustments to the Contributions and Fund Accounting modules of existing databases. Thoughtful setup helps to ensure that we are focused on collecting the information we need in a manner that produces the most useful end-result. This session includes discussions, demonstrations, hands on exercises and procedures to consider for each module.

**15 Minute Break** (complimentary coffee, tea and beverages) *10:30 am*

### **PowerChurch Plus Software –“Maintaining the Payables, Receivables and Payroll Modules”**

This session is focused on the setup and maintenance of the accounts payable, receivable and payroll modules in PowerChurch Plus. Vendor database setup, maintenance and the importance of tracking and reporting our 1099 vendors is covered as is the setup and maintenance of issuing invoices (i.e., preschool tuition). Significant time for this session is devoted to the setup and maintenance of the payroll module including handling clergy withholding taxes, housing allowance, SECA, retirement, and medical reimbursements.

**Blessing, Lunch & Fellowship** (complimentary beverages and lunch) *12:00 pm – 1:00 pm*

Attendees have the opportunity to enjoy fellowship in the break area and/or participate in an interactive and open forum for the discussion of questions among the participants and instructors.

### **PowerChurch Plus Software – “Using the Contributions Module”**

One of our foremost financial responsibilities is to ensure giving records that are accurate and timely. Therefore, contribution data entry is a task that requires our diligent care and effort. This session focuses on the use of the Contributions module in PowerChurch to record, manage and report on donations, the implementation of procedural controls and tools (developed by PowerChurch and Books in Order) to reduce deposit errors, protecting contributor’s privacy and the printing/emailing of contributor’s statements. A “sample” offering plate will be counted and reconciliation procedures discussed. The production of various income reports and graphs designed for church governing bodies and the congregation as well as the interaction with the Fund Accounting module is presented.

**15 Minute Break** (complimentary coffee, tea and beverages) *2:15 pm*

### **PowerChurch Plus Software– “Using the Accounts Payable and Receivable Module”**

The accounting modules in PowerChurch Plus are powerful and feature rich tools. Hands on user training and the capabilities of the payables and receivables module are presented. Key topics include vendor database maintenance and tools; manual check and invoice payables entry and printing; invoicing and processing payments for services (i.e., tuition,); adjusting laser checks; monitoring and printing 1099s; voiding and correcting checks; memorized payments (repeating); posting transactions to accounting; key accounts payable and receivables reports.

**Q&A Session & Closing Remarks** *3:45 pm*

## ~Day Three~

**Registration & Fellowship** (complimentary coffee and beverages) *8:30 am – 9:00 am*

**Welcome, Giving Thanks & Program Overview** *9:00 am*

### **PowerChurch Plus - "Using the Payroll Module"**

The Payroll module has been totally overhauled in V11. This session will focus on the functionality and use of existing features of V9-V10 and the new features provided in V11 of PowerChurch Plus. Payroll functions including employee setup and maintenance, payroll record creation, manual and laser check printing, tax related issues, forms, preparation and reporting; time off/sick time calendar; voiding payroll checks; tax reporting features; key payroll reports.

### **PowerChurch Plus Software – "Using Fund Accounting"**

This session will focus on Fund Accounting and its utilization of the data generated from the Contributions, Accounts Payable, Accounts Receivable and Payroll modules of PowerChurch Plus. Significant time is focused on using the excellent preformatted financial reports and features, graphs and other output to benefit our church family. Examples of posting errors and the steps to generating correcting entries in PowerChurch Plus are covered. Key topics include: posting transactions, month end closing and bank reconciliations; closing a period; setting up and maintaining memorized journal transactions; available reports, reporting levels and ideas on how to best present specific financial reports based on the needs of your audience.

**15 Minute Break** (complimentary coffee, tea and beverages) *10:45 am*

### **PowerChurch Plus Software – "Setup and Use of the Membership Module"**

This session presents considerations and tools for the initial membership module setup, daily use and on-going maintenance. Specific user training will include PowerChurch Plus Integrated Data Entry; Family Mailing List Records and Personal Profiles.

**Blessing, Lunch & Fellowship** (complimentary beverages and lunch) *12:15 pm – 1:15 pm*

Seminar attendees have the opportunity to enjoy fellowship in the break area and/or participate in a working session focused on the setup and use of PowerChurch Plus Check In (V11 add on module). At the heart of the design of this module is child security. The Rev. Mike Srbljan discusses the applications, benefits and capabilities in a demonstration of this powerful new addition to PowerChurch Plus software.

### **PowerChurch Plus Software – "Setup and Use of the Membership Module"**

This session continues with specific user training on PowerChurch Plus Activities and Skills, Attendance, Visitations, and Ministry Services. Other topics will include preformatted and custom report generation, the execution of a mail merge/mailling labels and the production of a church directory

**15 Minute Break** (complimentary coffee, tea and beverages) *2:30 pm*

### **PowerChurch Events and Calendar Module**

A feature rich event calendar and planning tool that allows for the scheduling of one time or reoccurring events "Church-wide" or for members of specific activities and skills. This session will cover use of the events calendar including; reserving rooms and equipment; assigning related tasks to individuals; generating event calendars for your web site or word processor; sending e-mail task & event notifications to staff and volunteers; integration with online calendars (Google).

**Q&A Session & Closing Remarks** *3:45 pm*