

# **Church Secretary for Windows 2014**

**Affordable Software for a Small Church with a Small Budget**

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*I hope you will find the program a good value and that it may be helpful to your church.*

*If you have any questions send me an email at [dbandsons@aol.com](mailto:dbandsons@aol.com) and visit our new web site at <http://www.churchsecretaryforwindows.com>*

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# 1 Introduction

## 1.1 Welcome to Church Secretary for Windows 2014

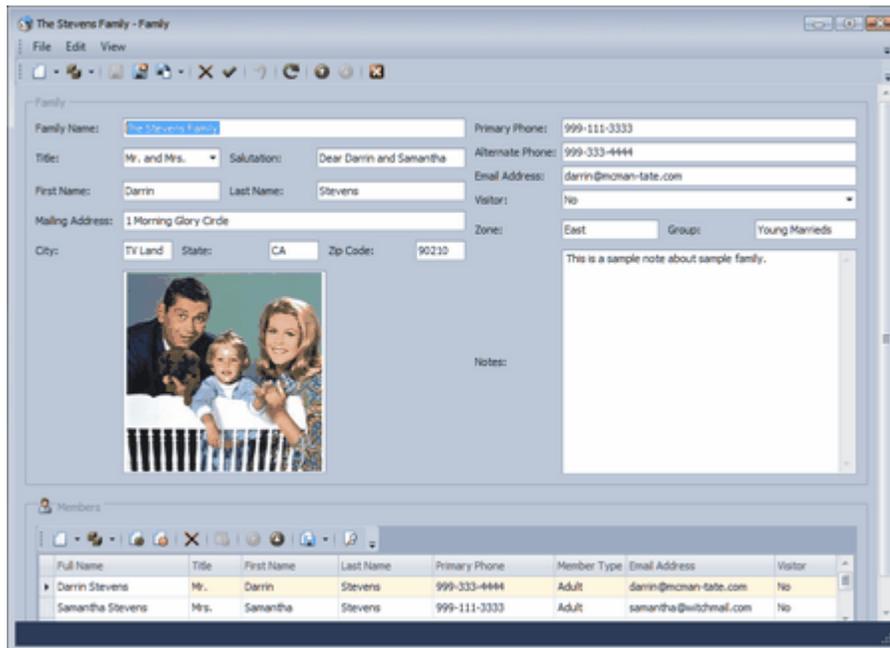
Thank you for your interest in Church Secretary for Windows 2014. There have been many change to this program with this new version. I believe CSW 2014 delivers a lot of features and functionality for the low price of just \$99. I wish I had more time to write the help manual on the program but if I keep at it much longer no one will have time to read it all. Instead of making this document even longer I will be posting a series of how to videos at the new web site for this program:

<http://www.churchsecretaryforwindows.com>

I have a longer document with much more detail about the program available for download (a large download, sorry) just email me at [dbandsons@aol.com](mailto:dbandsons@aol.com) and I will send you a link to that document.

If you have questions after reading this document and using the program for a while, don't hesitate to email me at [dbandsons@aol.com](mailto:dbandsons@aol.com) and I will try to get back to you quickly. I may be able to answer your questions by reply email or I may post a video on line. Sometimes I think it easier to see something being done than to read about how to do it. NOTE: The program is delivered without much sample data. Start by entering Family, Member and other information so that when you then begin trying the many included reports and dashboards you will see more than empty pages.

Still you have come this far, so please do keep reading the documentation for Church Secretary for Windows 2014.



I developed the first version of Church Secretary for Windows many, many years ago and sold it for the at the time low cost of \$45. Since that initial release I have made many changes to the program, and yes increased the price a few times. Now, with the release of Church Secretary for Windows 2014, I am introducing many changes and improvements. In fact, this new version has been so completely rewritten that just about the only thing I kept from earlier versions was the application icon. If you have used any earlier version of Church Secretary for Windows you will immediately see the many changes in this release.

There are many more expensive programs available for church administration. In fact, nowadays there

are many programs that can be purchased (actually rented) that run on a hosted server where the church just pays a monthly fee to use the program. This program is intended for the small church with a small budget. I know that some of the churches that are using my program don't even have a secretary. The preacher may do all the work. Church Secretary for Windows 2014 is being released with the goal of providing an affordable alternative to the small church on a budget. The cost to purchase a license (perpetual, not annual) is just \$99. The program is delivered as a Trial version using a software activation service called Copy Minder. This will let you try the program for up to 30 days to see if it meets your needs before you need to buy a license to continue using the program. After you place your order with our Registration Service at BMTMicro.com - your software will be converted to a fully licensed and registered copy with no more expiration warnings. Using Copy Minder, unlike software activation I have used with earlier versions, you will not need to copy and paste (or type) a long registration key to remove the trial limitation. The activation will be conducted over the internet with no intervention needed from you.

We encourage you to read through this manual and try the program out to see if it meets your needs. Technical support is free but limited to email. There are no upgrade or maintenance fees (never has been). If you buy a license to Church Secretary for Windows 2013 you will be eligible for any future version updates free. NOTE: I may have separate Edition which is not the same as a Version upgrade. For example, because this Edition is intended for small church staff there is no User Login and Procedure Security. It may still be used on a network, but is not designed for multiple users. I may also develop a version of Church Secretary for Windows with a Browser Based Interface - may or may not be called Church Secretary for the Web.

## 1.2 Ordering a License

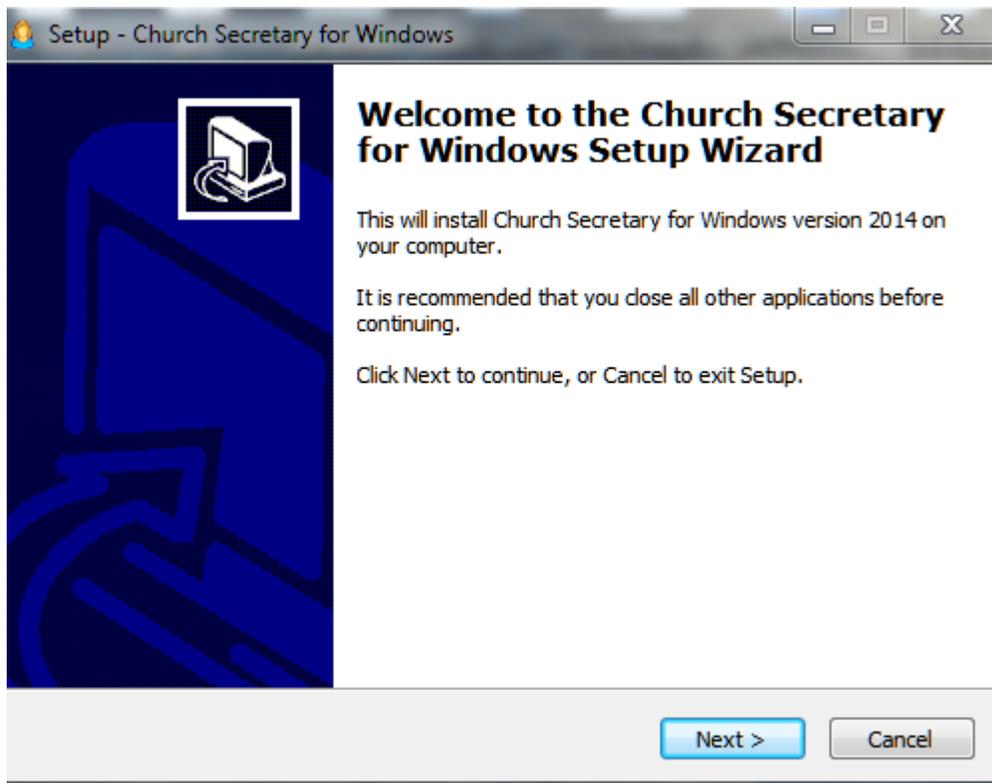
Church Secretary for Windows 2014 is provided in the download as fully functional 30 day trial version. This way you can fully evaluate the program before purchasing a license. The cost is just \$99 and there are no hidden costs. When you buy a license you can continue to use the program as long as you like without paying any additional fees. If you do decide after trying the program to buy a license I will receive notification of your order. I can then use the CopyMinder activation service to remove the 30 day trial limitation remotely. You will not need to enter any long registration code. The conversion from trial to perpetual license will happen automatically over the internet and after the program performs one of its periodic checks with CopyMinder it will see the trial has been changed to a permanent license and you will stop getting reminders about how many days you have left to evaluate the program.

Ready to buy your license? [Click Here](#) to go the order page.

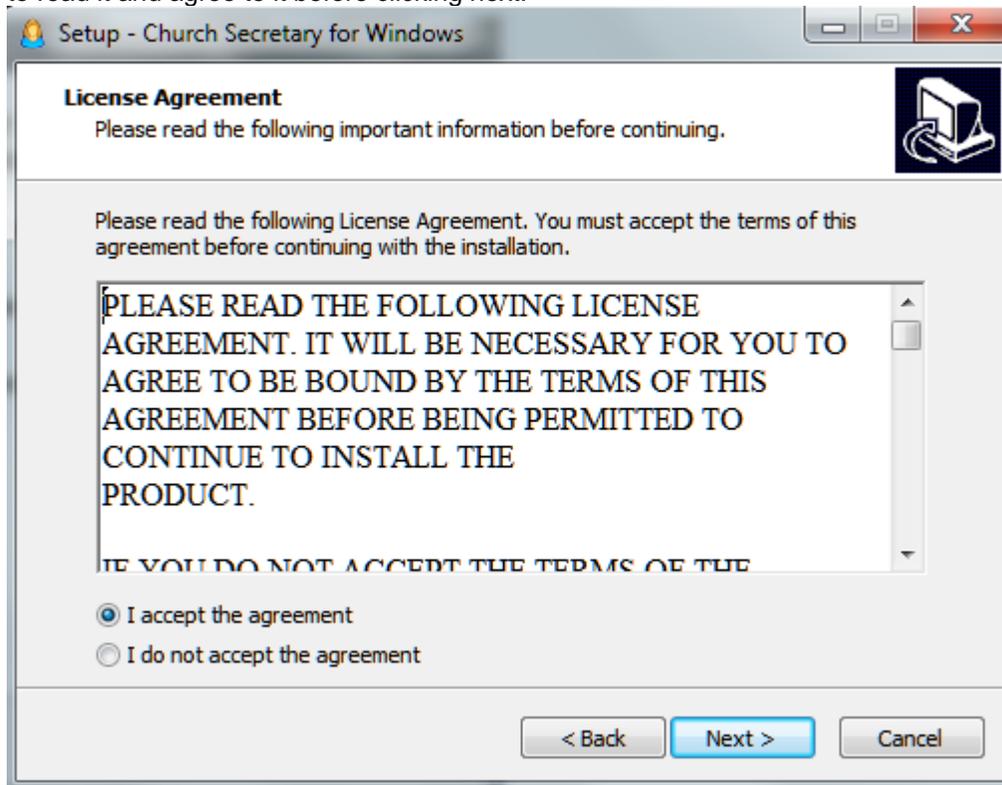
## 2 Getting Started

### 2.1 Installation

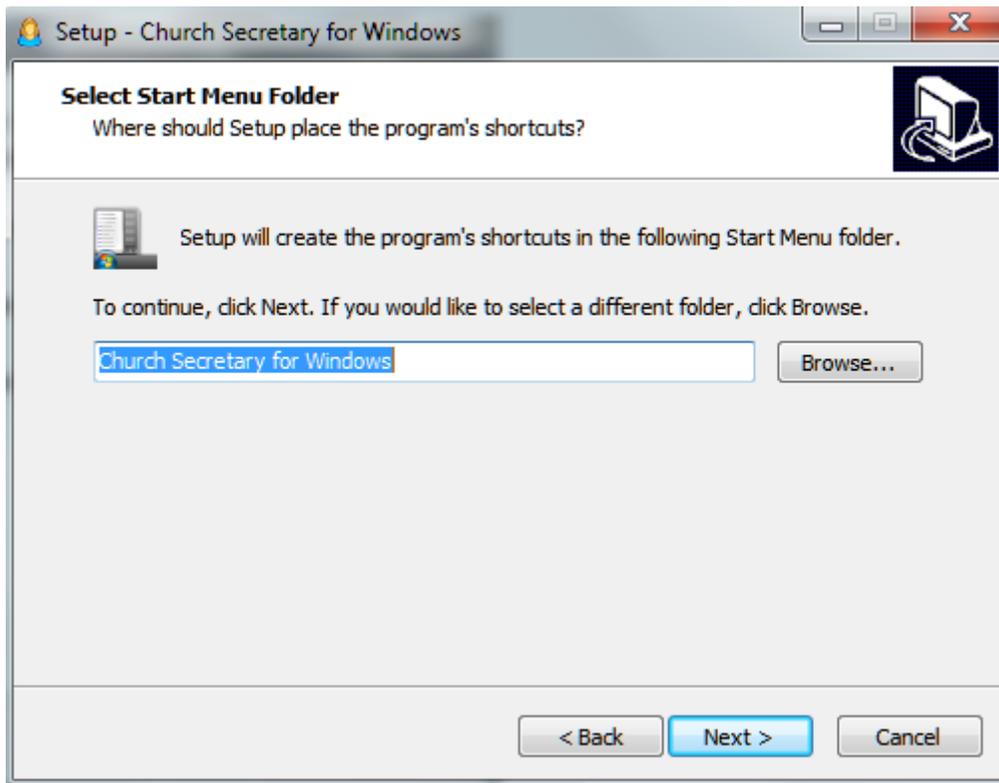
The setup file is included in the .zip file along with a PDF manual (the file you are reading now). Setup must be run as an Administrator level. Click through the screens as shown below.



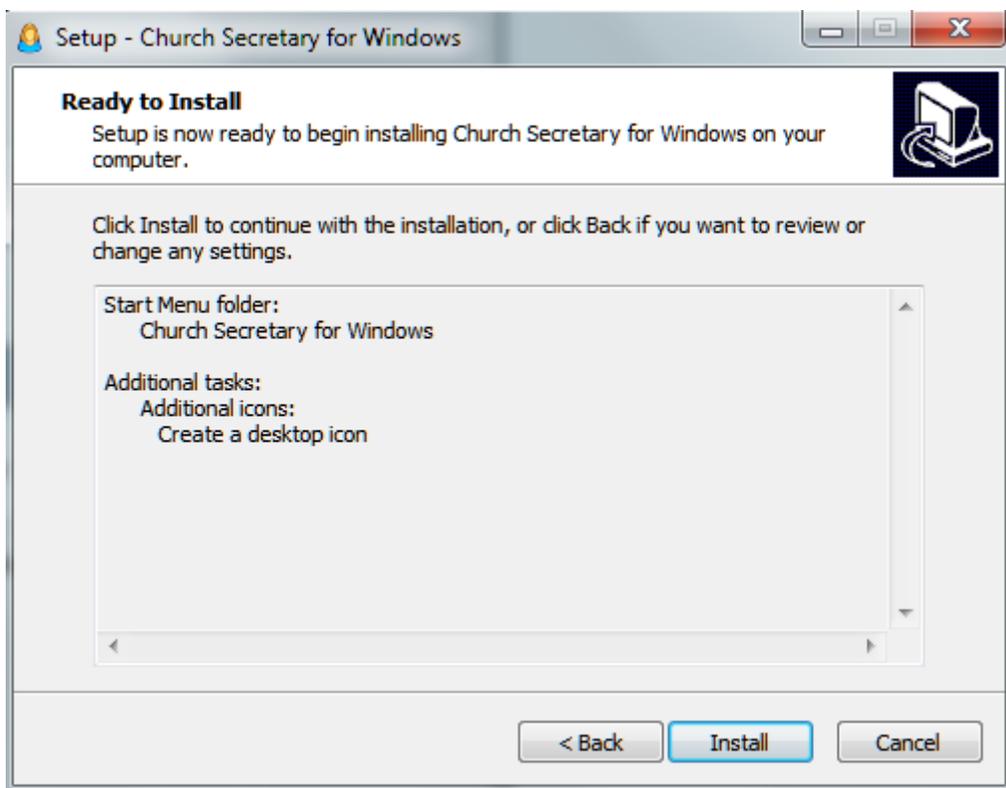
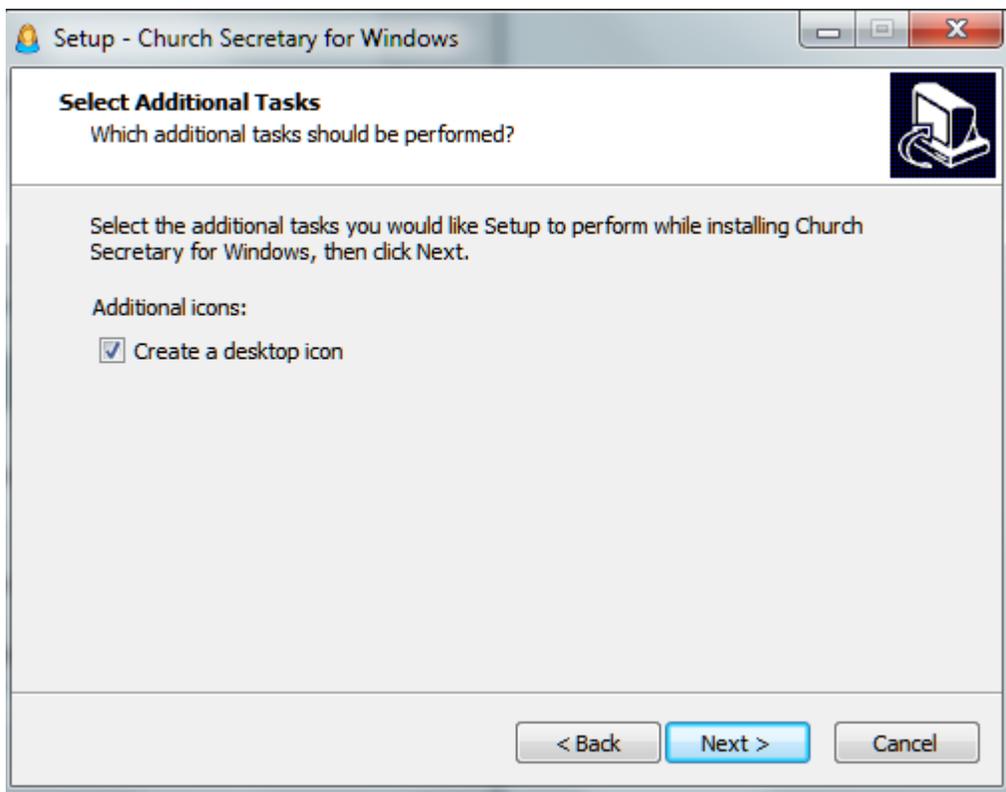
This next screen allows you to view the End User License Agreement. Standard legalese but you need to read it and agree to it before clicking next.



The next screen lets you choose the Start Menu folder.

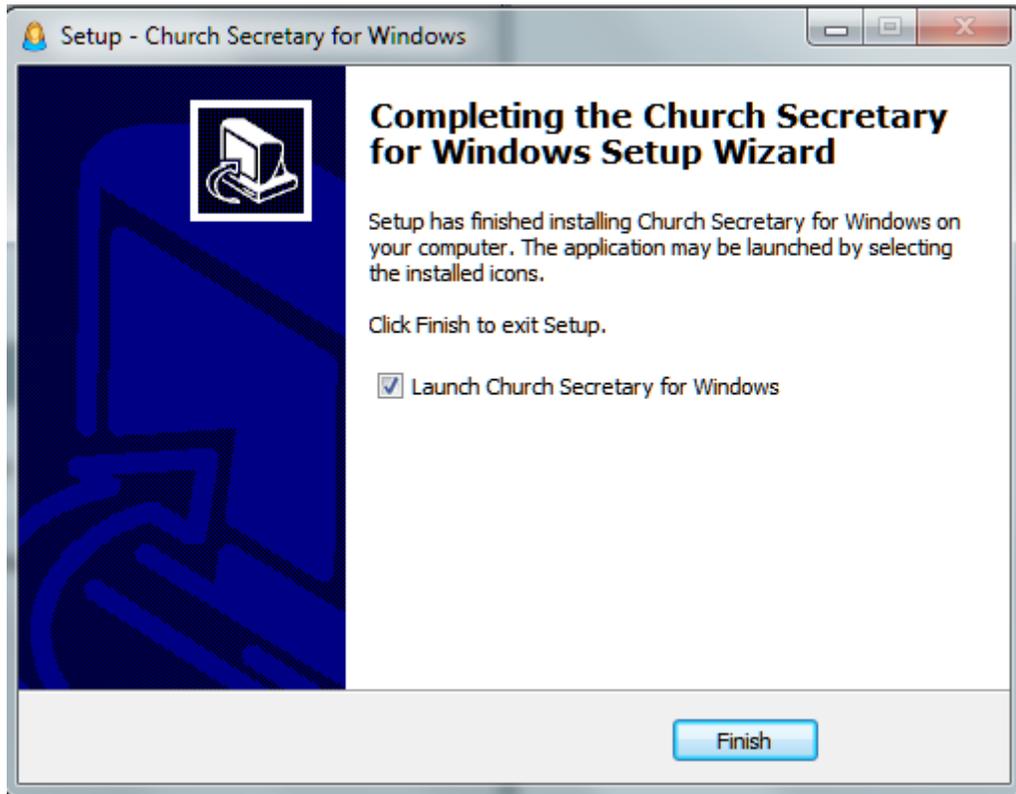


I recommend you check the button below to create a shortcut icon on the desktop - but it is up to you.

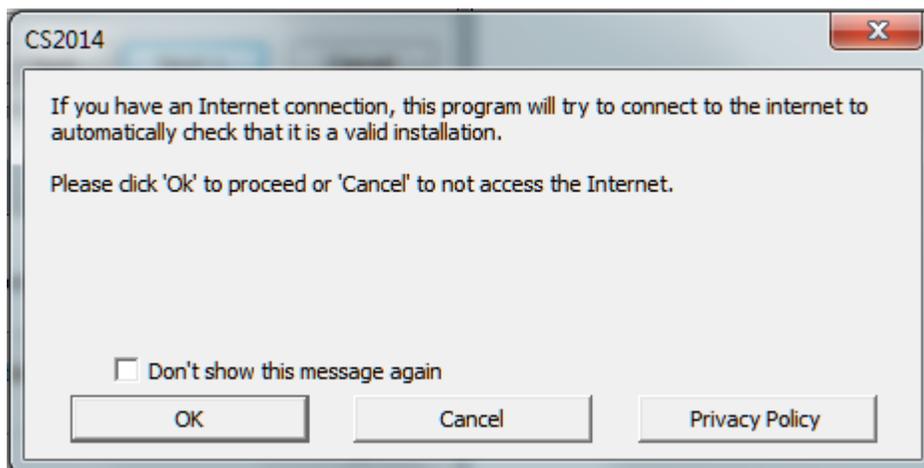


The next screen will let you start the program you just installed, but first it will begin the product

registration.

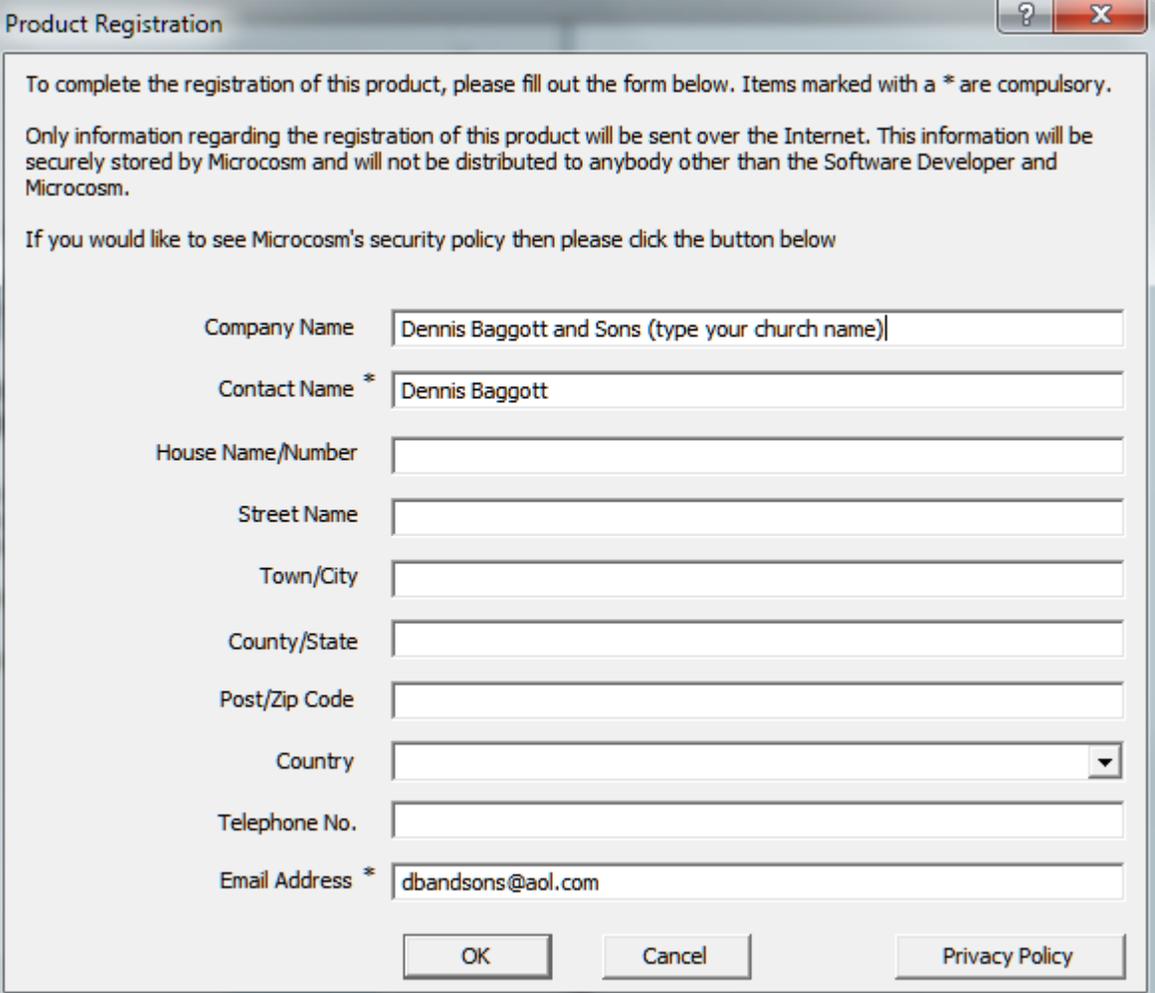


You need to be connected to the internet. The software activation service I am using is an Internet based service. When you finish the installation process and use the next few screens to get registered I will be notified by email that you have installed the program. After you try the program, if you decide to buy a site license then I will be able to remotely remove the trial limitation of 30 days. Also, and I haven't been able to do this easily in the past, if you need more than 30 days to evaluate the program to see if it meets your needs I will be able to add days to the trial period.



The only fields on this screen you really need to fill out is your name and email address. I would appreciate it if you put your Church Name in the Company Name field. That way if I get an email from someone else at your church, even though it was set up with your contact name, I will know what

church I am emailing.



The image shows a 'Product Registration' dialog box with the following text and fields:

To complete the registration of this product, please fill out the form below. Items marked with a \* are compulsory.

Only information regarding the registration of this product will be sent over the Internet. This information will be securely stored by Microcosm and will not be distributed to anybody other than the Software Developer and Microcosm.

If you would like to see Microcosm's security policy then please click the button below

Company Name: Dennis Baggott and Sons (type your church name)

Contact Name \*: Dennis Baggott

House Name/Number: [empty]

Street Name: [empty]

Town/City: [empty]

County/State: [empty]

Post/Zip Code: [empty]

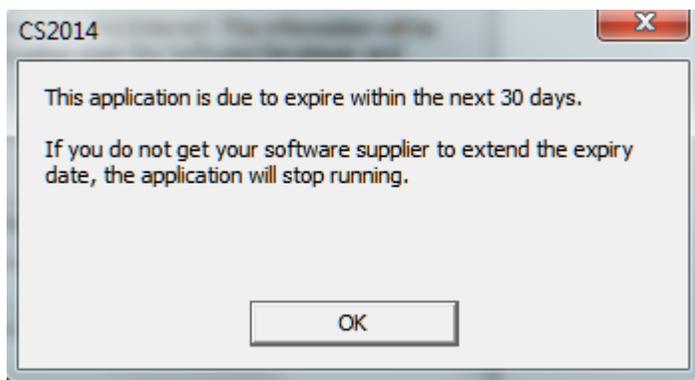
Country: [empty]

Telephone No.: [empty]

Email Address \*: dbandsons@aol.com

Buttons: OK, Cancel, Privacy Policy

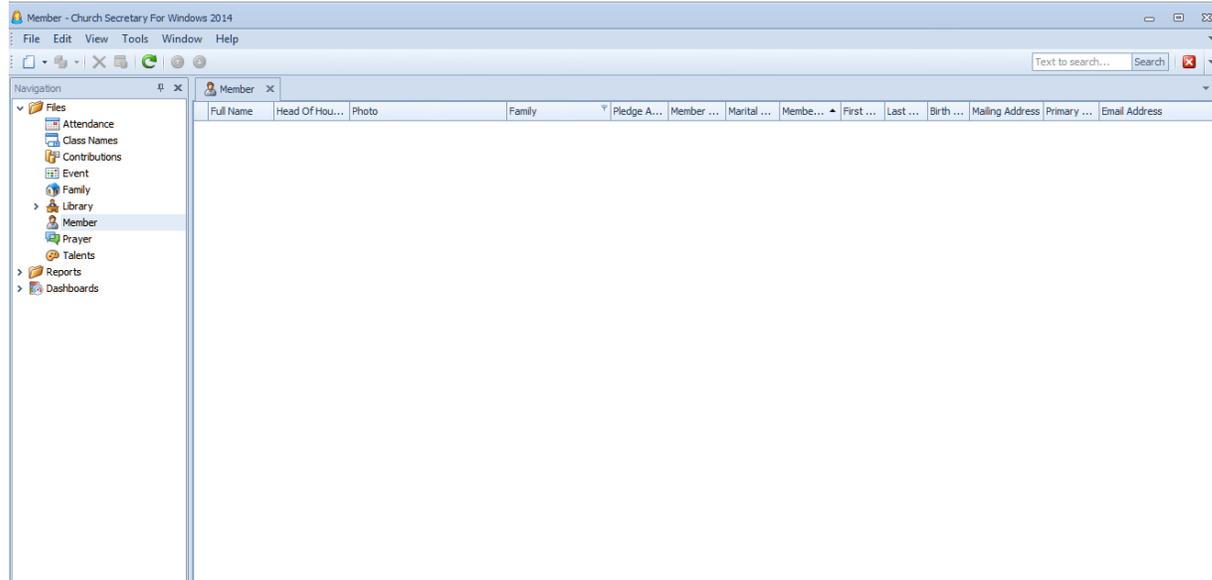
Your first reminder will start after you finish the product registration. You should see a reminder with how many days you have remaining every time you start the program until you either uninstall the program because you didn't like it, or until a few days after you purchase a license because you did like the program. I am hoping for the latter.



After you click OK to the above screen you will eventually see the Loading message with my Church

Secretary icon. Then you will see a screen like the one below. Have fun and email me your comments.

Dennis Baggott  
the Dad in Dennis Baggott and Sons  
[dbandsons@aol.com](mailto:dbandsons@aol.com)



## 2.2 Overview

Church Secretary for Windows 2014 was designed to be an easy to use, yet powerful and full featured program that would be affordable for the smallest church. The program uses a Microsoft Access format database on the back end and Microsoft .NET managed code for the windows desktop interface. This version requires the Microsoft .NET 4.0 framework and so you should be running Microsoft Windows 7 or Windows 8 or Vista. A hard drive with at least 500 megabytes of free disk space is recommended and at least 2 gigabytes of RAM. The largest size monitor you can afford will be helpful so you can see more information at one time.

The database is designed around relationships. For example, 1 Family in your church may have many individual members. Each 1 member in your church may make many contributions each week. Your members may choose to contribute to any of several Funds and so each 1 Fund might have many related contributions. If you use the Church Library features in CSW 2014 you may loan out the same 1 book or other media many times. Each member in your church may have many Talents and a single talent may be shared by many members. Church Secretary for Windows 2014 was designed to help you easily and efficiently record all these related items and the produce useful reports that can help you in day to day church administration.

The screenshot displays the 'Member' profile for Samantha Stevens. The form is organized into several sections:

- Member Information:** Full Name (Samantha Stevens), Birth Date (9/1/1940), Baptism Date, Family (The Stevens Family), Graduation Date, Wedding Date (6/7/1965), Title (Mrs.), Date Joined (1/23/2013).
- Contact Information:** First Name (Samantha), Last Name (Stevens), Mailing Address (1 Morning Glory Circle), City (TV Land), State (CA), Zip Code (90210), Primary Phone (999-111-3333), Alternate Phone, Email Address (samantha@witchmail.com).
- Administrative Fields:** Head Of Household (No), Include In Mailing (Yes), Regular Giver (No), Envelope, Pledge Amount (\$0.00), Visitor (No).
- Personal Details:** Marital Status (Married), Member Status (Active), Member Type (Adult).
- Notes:** A text area containing a sample note: "This is a sample note. Samantha is nice person but has an unusual twitch in her nose. Strange things seem to happen when she is around."
- Contributions Table:** A table showing three contributions for Samantha Stevens.
 

| Member           | Contribution Date | Contribution Amount | Designated Fund | Deductible | Method |
|------------------|-------------------|---------------------|-----------------|------------|--------|
| Samantha Stevens | 10/6/2013         | \$50.00             | Missionary      | Yes        | Check  |
| Samantha Stevens | 9/29/2013         | \$50.00             | Missionary      | Yes        | Check  |
| Samantha Stevens | 8/22/2013         | \$50.00             | Missionary      | Yes        | Check  |

In the screen shot above you notice the many tabs along the bottom of the screen that show the different items "related" to this member?

Church Secretary for Windows 2014 includes a wide range of reports and charts to let you get the most out of the data you put in to the program. Several Dashboard style screens are also provided to let you get a birds eye view of Contributions, Attendance and even Demographics. In addition to this printed help file, I am providing a series of "how to" videos on the web site at <http://www.churchsecretaryforwindows.com> - in addition, if customers ask questions about certain tasks I may add additional videos on the web site to address those topics. If all else fails, email me at [atdbandsons@aol.com](mailto:atdbandsons@aol.com) - I try to always reply within 24 hours and it costs you nothing. Maybe I can help - maybe I can't, but I am always glad to try.

## 2.3 Navigation

Church Secretary for Windows 2014 includes a tree style navigation option. This will allow you to move from one part of the program to another quite easily. You can choose to "hide" the Navigation if you like, then if you change your mind show the tree again. It is up to you.

The image shows a software interface with a 'Panels' menu at the top left. The menu items are:

- Back (Alt+Left)
- Forward (Alt+Right)
- Navigation
- Previous Record (Ctrl+PageUp)
- Next Record (Ctrl+PageDown)
- Refresh (F5)
- Choose Skin

The 'Navigation' panel is open, showing a tree view of content:

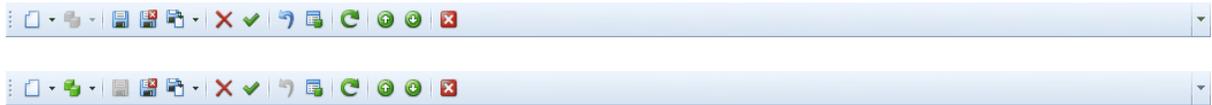
- Files
  - Attendance
  - Class Names
  - Contributions
  - Event
  - Family
  - Library
  - Member
  - Prayer
  - Talents
- Reports
  - Reports
- Dashboards
  - Attendance
  - Contributions
  - Demographics - Not Inte...

On the right, a settings menu for the 'Navigation' panel is visible, with the following options:

- Visible
- Auto Hide
- Hidden

## 2.4 Tool Bar Buttons

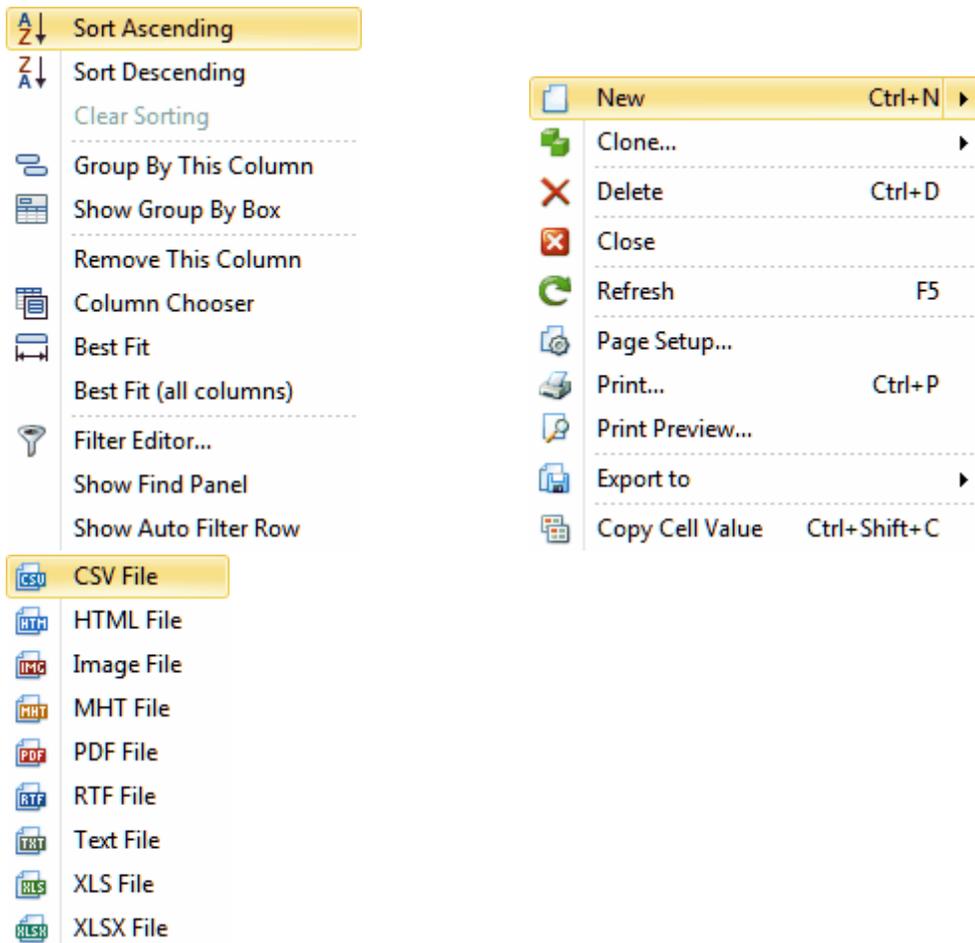
The first tool bar is slightly different than the second one shown. In the first screen changes have already been made some the Save changes and Clone buttons are disabled. In the second tool bar image changes have not yet been made.



The first button on the tool bar will let you **Add a New Record**. The next button is similar but it will actually make a **copy of the current record**. This "cloned" record can then be modified to change only the things that are different about the new record than one it is based on. The third button from the left is to **Save changes to the record**. It will be disabled (grayed out) if no changes have been made to the record. The next button will **save the record and close the screen**. The fifth button will save the record and open the screen to add a **New record**. Following the Save and New button is **Delete** button. You will be prompted to confirm you want to delete the record. The button with the **Check mark icon is to Validate the record before saving it**. Some files have a Validation Rule. For example the Family field on the Family Record cannot be blank and must be unique. Click the Check Mark button to validate your entries. The next button, backwards pointing arrow will be enabled when you have made changes and it allows you to cancel the changes. If the cursor is in a field that has a related record - for example on the Member Record if you have the Family field selected, the **Related Record** button will be enabled to allow you to open and refer to the related family record. The forward pointing circular arrow is for **refreshing the record** - if you are using the program on a network (this edition is for single users, but a future edition of Church Secretary may be geared for network users with login names, passwords and so on). The button with the Arrow pointing up will let you go to the **previous record** without first closing the record you are on. Similarly, the button with the arrow pointing down will let you go to the **next record**. Finally, the last button on the tool bar will close the record screen.

## 2.5 Grid Features

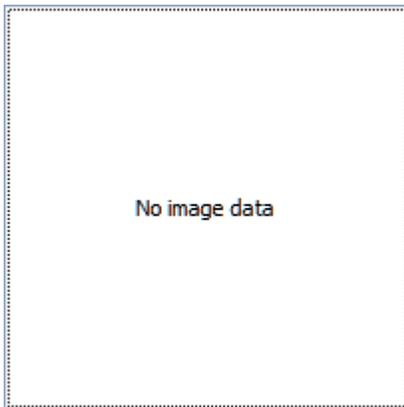
The grid view of records has a lot of features built in. You can easily sort columns, filter data, choose which columns to show or hide and export the grid. Options in popup menus depend on whether your cursor was on a Column Header or in a grid cell. See the screen shots below, then try these options yourself.



## 2.6 Image and Photos

Church Secretary for Windows 2014 allow you to save a picture with each Family, Member and Library record. These images become part of the database so if you load an image from a CD or USB hard drive you can then remove the media containing the image files and the images will still be viewable and printable in reports. If you later need to copy an image, or save it to a folder on your computer you can do that to. Maybe you want to copy an image of a book that has been misplaced and paste the image into an email or flyer. You can do that too.

When you right click in empty image place holder like below..



you will see a pop up menu and use the Load option to browse to the location of the image file.

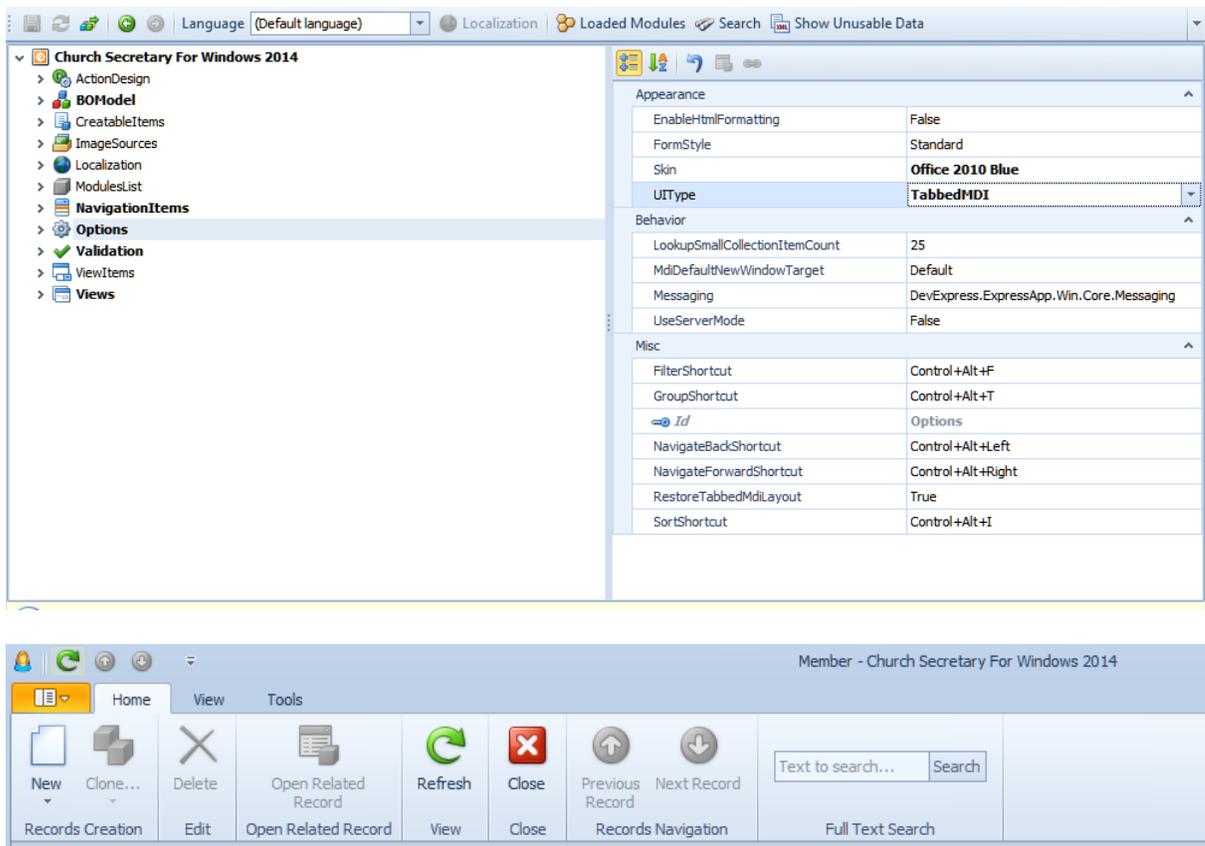


You will then see the image loaded like the example below. Save the record and your image will then be displayed on the screen and can be included in reports.

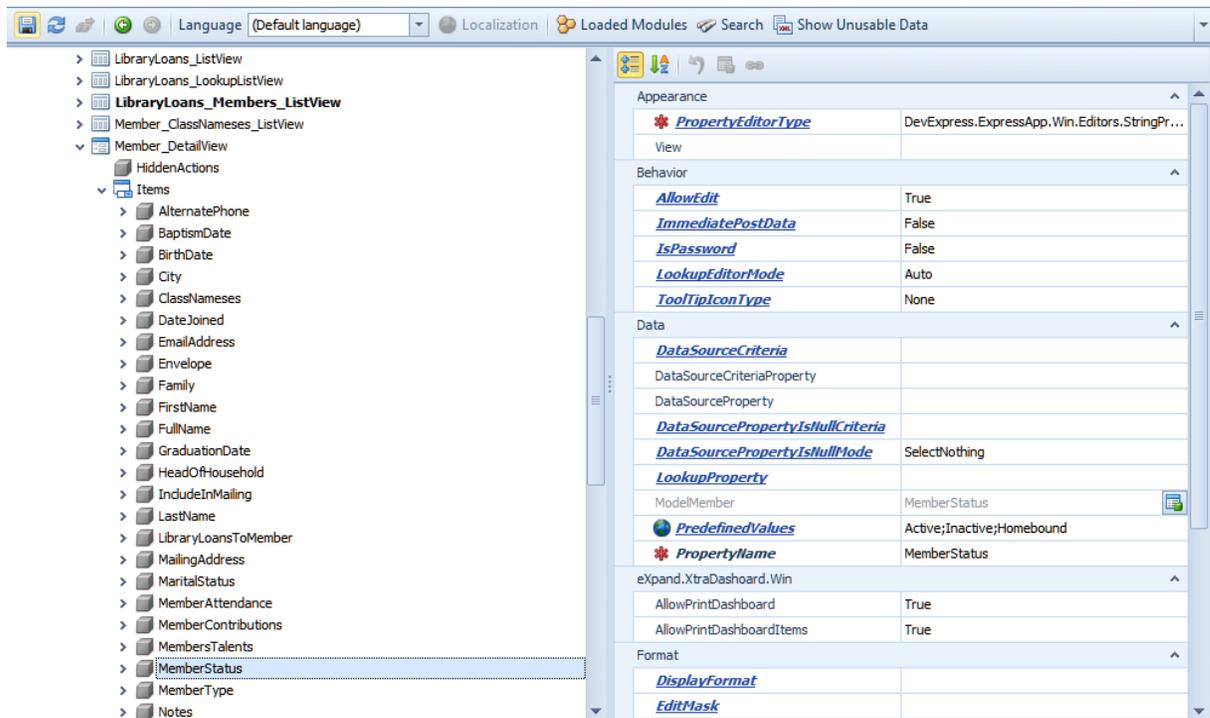


## 2.7 Model Editor

I really don't recommend using the Model Editor because it is kind of complicated - and powerful. However, this tool allows some options not available other places in the program. For example, in the first screen below you can change the Form Style from "Standard" to "Ribbon" and some may prefer that interface. The second screen shot shows the Ribbon Interface. The UIType offers several choices, such as Tabbed or SDI (Single Document Interface) and so on.



In the case of some fields rather than use a database table to populate drop down choices I entered Predefined Values separated by a semi colon. So in the screen below if you wanted to change the options for Member Status you would have to navigate the long tree view on the left to find the Member Status field then on the right make changes where I have Active;Inactive;Homebound. The same process would be needed for other fields where I have a predefined selection. The Model Editor is available from the Tools menu. After making any changes you want to keep click the Save button then close the window and the program should start up with your changes. Again, if you have question on editing the Model please email me at [dbandsons@aol.com](mailto:dbandsons@aol.com)



## 3 Attendance

Church Secretary for Windows 2014 allows you to record and report on member attendance.

### 3.1 Attendance Grid

This grid is used to display member attendance records. Like all grids you can sort rows by clicking on the column headings and filter data by clicking the icon in the column header.

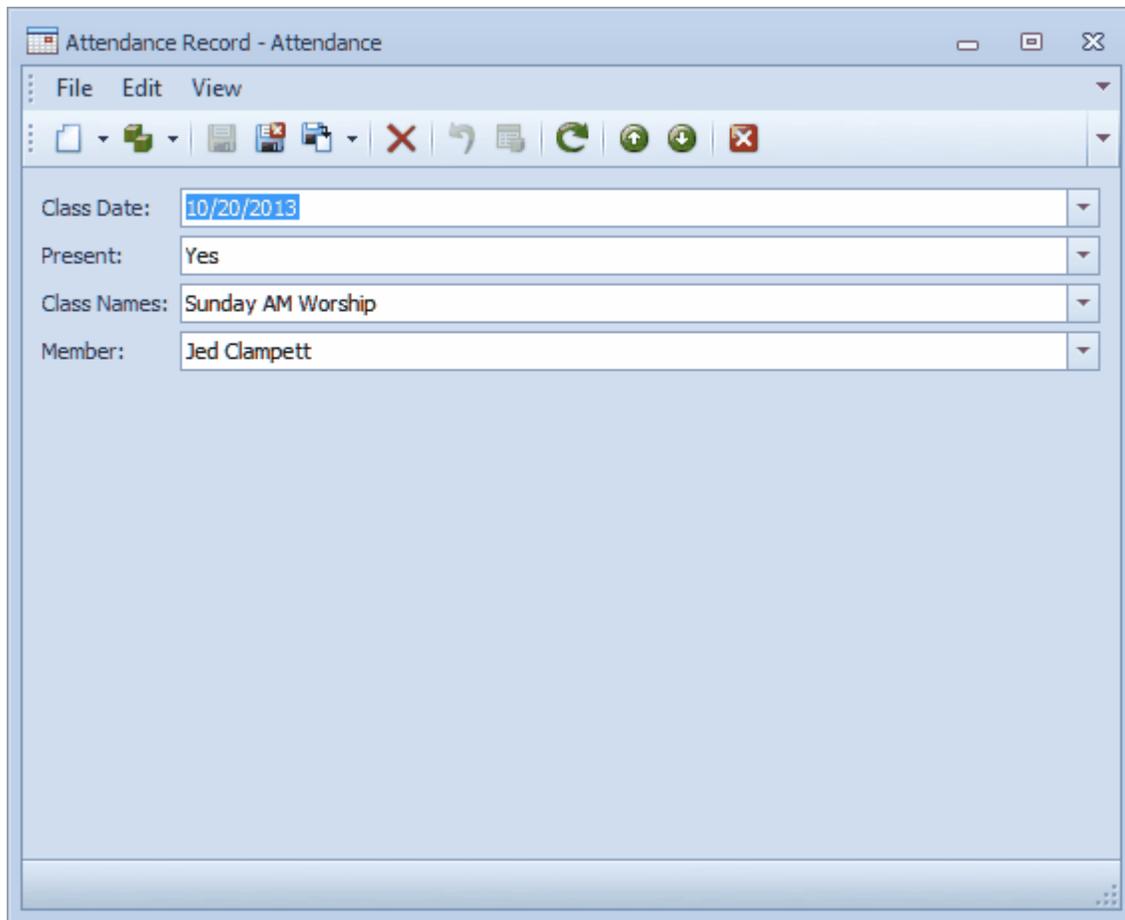
In this grid you can add a new record by clicking in the top (empty) row. Enter the date of the class, choose the Class Name, enter Yes if the member was present or No if the member was absent. Enter the Member's full name.

| Class Date | Class Names       | Present | Member           |
|------------|-------------------|---------|------------------|
| 10/27/2013 | Sunday AM Worship | Yes     | Lilly Munster    |
| 10/27/2013 | Sunday AM Worship | Yes     | Darrin Stevens   |
| 10/27/2013 | Sunday AM Worship | Yes     | Samantha Stevens |
| 10/27/2013 | Sunday AM Worship | Yes     | Morticia Addams  |
| 10/27/2013 | Sunday AM Worship | Yes     | Gomez Addams     |
| 10/20/2013 | Sunday AM Worship | Yes     | Jed Clampett     |
| 10/20/2013 | Sunday AM Worship | Yes     | Marilyn Munster  |
| 10/13/2013 | Sunday AM Worship | Yes     | Jed Clampett     |
| 10/13/2013 | Sunday AM Worship | Yes     | Jed Clampett     |
| 10/13/2013 | Sunday AM Worship | Yes     | Marilyn Munster  |
| 10/13/2013 | Sunday AM Worship | Yes     | Samantha Stevens |
| 10/6/2013  | Sunday AM Worship | Yes     | Samantha Stevens |
| 10/6/2013  | Sunday AM Worship | Yes     | Jed Clampett     |
| 10/6/2013  | Sunday AM Worship | Yes     | Darrin Stevens   |
| 10/6/2013  | Sunday AM Worship | Yes     | Marilyn Munster  |
| 9/29/2013  | Sunday AM Worship | Yes     | Jethro Bodine    |
| 9/29/2013  | Sunday AM Worship | Yes     | Greg Brady       |
| 9/29/2013  | Sunday AM Worship | Yes     | Darrin Stevens   |
| 9/29/2013  | Sunday AM Worship | Yes     | Marilyn Munster  |
| 9/29/2013  | Sunday AM Worship | Yes     | Herman Munster   |
| 9/29/2013  | Sunday AM Worship | Yes     | Samantha Stevens |
| 9/22/2013  | Sunday AM Worship | Yes     | Granny Clampett  |
| 9/8/2013   | Sunday AM Worship | Yes     | Marilyn Munster  |

### 3.2 Attendance Record

Enter the date of the class, choose the Class Name, enter Yes if the member was present or No if the member was absent. Enter the Member's full name. You may find it quicker to use the Clone button - to the left of the New button. This will allow you to create a copy of the currently selected record and change the field(s) that might be different. For example, if you are updating for a class for a particular date, you might enter the first record and then use the Clone button to quickly add new records changing only the Member Name - perhaps change the Present from Yes to No for those that were absent.

When finished adding records, click the button with the X at the far right of the tool bar to close the screen.



## 4 Contributions

Church Secretary for Windows 2014 allows you to easily record contributions by members, and to view charts and reports on contributions.

### 4.1 Contributions Grid

This grid is used to display member contribution records. Like all grids you can sort rows by clicking on the column headings and filter data by clicking the icon in the column header. Right click on a column header to pop up a menu with options for sorting, grouping and filtering the records. Other options allow you to Export the data in any of several formats.

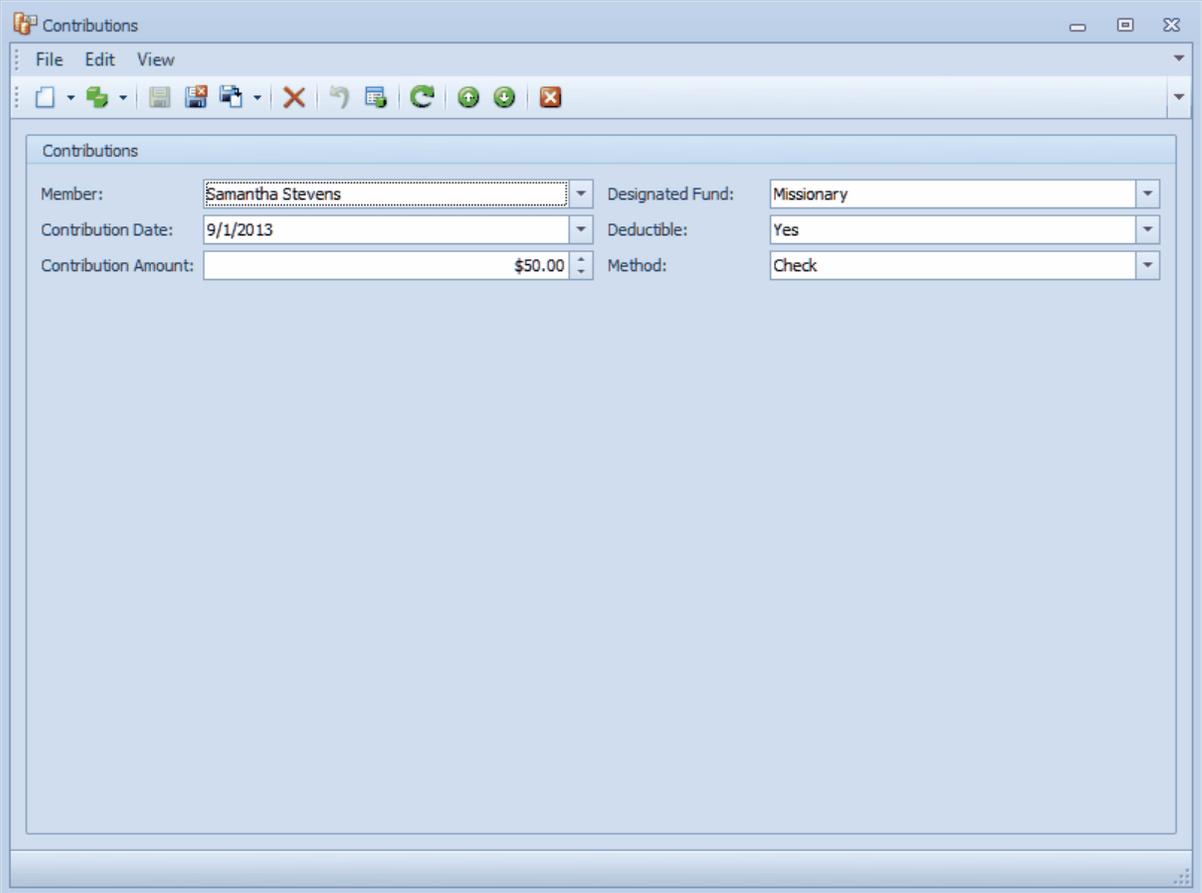
In this grid you can add a new record by clicking in the top (empty) row. Enter the Member Name, the Date of the contribution, amount, a designated fund, whether or not the contribution was deductible (in most cases this will be yes), and Contribution method..

| Member                                                                                                     | Contribution Date | Contribution Amount | Designated Fund | Deductible | Method      |
|------------------------------------------------------------------------------------------------------------|-------------------|---------------------|-----------------|------------|-------------|
| Click here to add a new row                                                                                |                   |                     |                 |            |             |
| Jed Clampett                                                                                               | 9/1/2013          | \$700.00            | Missionary      | Yes        | Cash        |
| Darrin Stevens                                                                                             | 9/1/2013          | \$150.00            | Other           | Yes        | Check       |
| Samantha Stevens                                                                                           | 9/1/2013          | \$50.00             | Missionary      | Yes        | Check       |
| Carol Brady                                                                                                | 9/1/2013          | \$45.00             | Other           | Yes        | Check       |
| Mike Brady                                                                                                 | 9/1/2013          | \$125.00            | General         | Yes        | Check       |
| SUM=\$1,070.00                                                                                             |                   |                     |                 |            |             |
| <input checked="" type="checkbox"/> [Contribution Date] >= '9/1/2013' And [Contribution Date] < '9/2/2013' |                   |                     |                 |            |             |
|                                                                                                            |                   |                     |                 |            | Edit Filter |

## 4.2 Contributions Record

You may find it quicker to use the Clone button - to the left of the New button. This will allow you to create a copy of the currently selected record and change the field(s) that might be different. For example, if you are updating contribution records for a date you may want to create the first new record then clone that record and change the name and amount of the person making the contribution, as well as the Designated Fund and method of contribution.

When finished adding records, click the button with the X at the far right of the tool bar to close the screen.



Contributions

File Edit View

Member: Samantha Stevens Designated Fund: Missionary

Contribution Date: 9/1/2013 Deductible: Yes

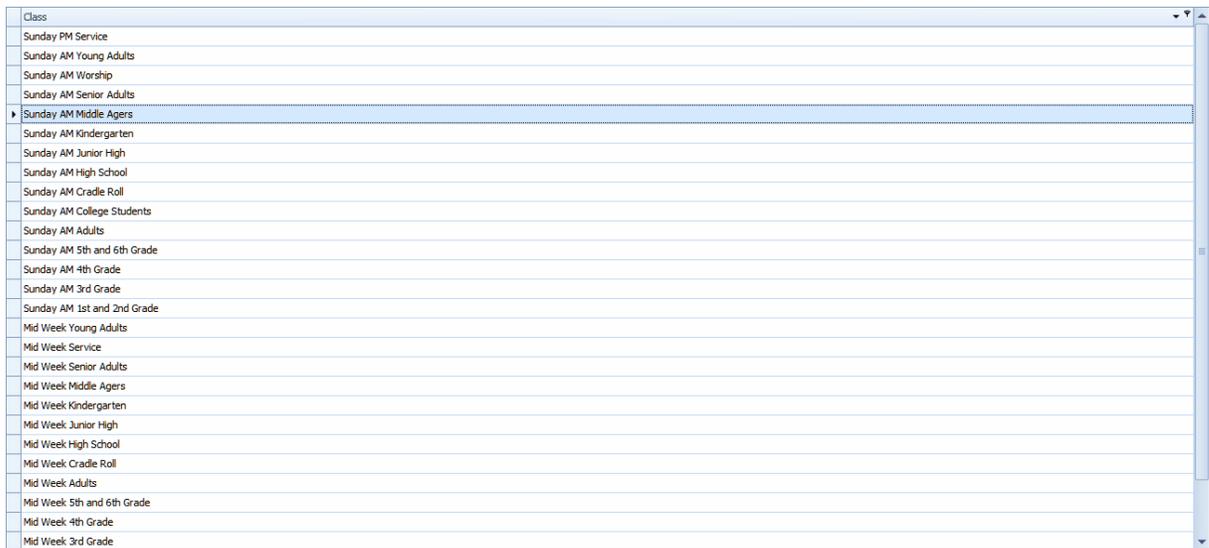
Contribution Amount: \$50.00 Method: Check

## 5 Class Names

You will find it helpful in recording member attendance to print class rosters. Start by creating or updating class names and add (or link) members to the class.

### 5.1 Class Names Grid

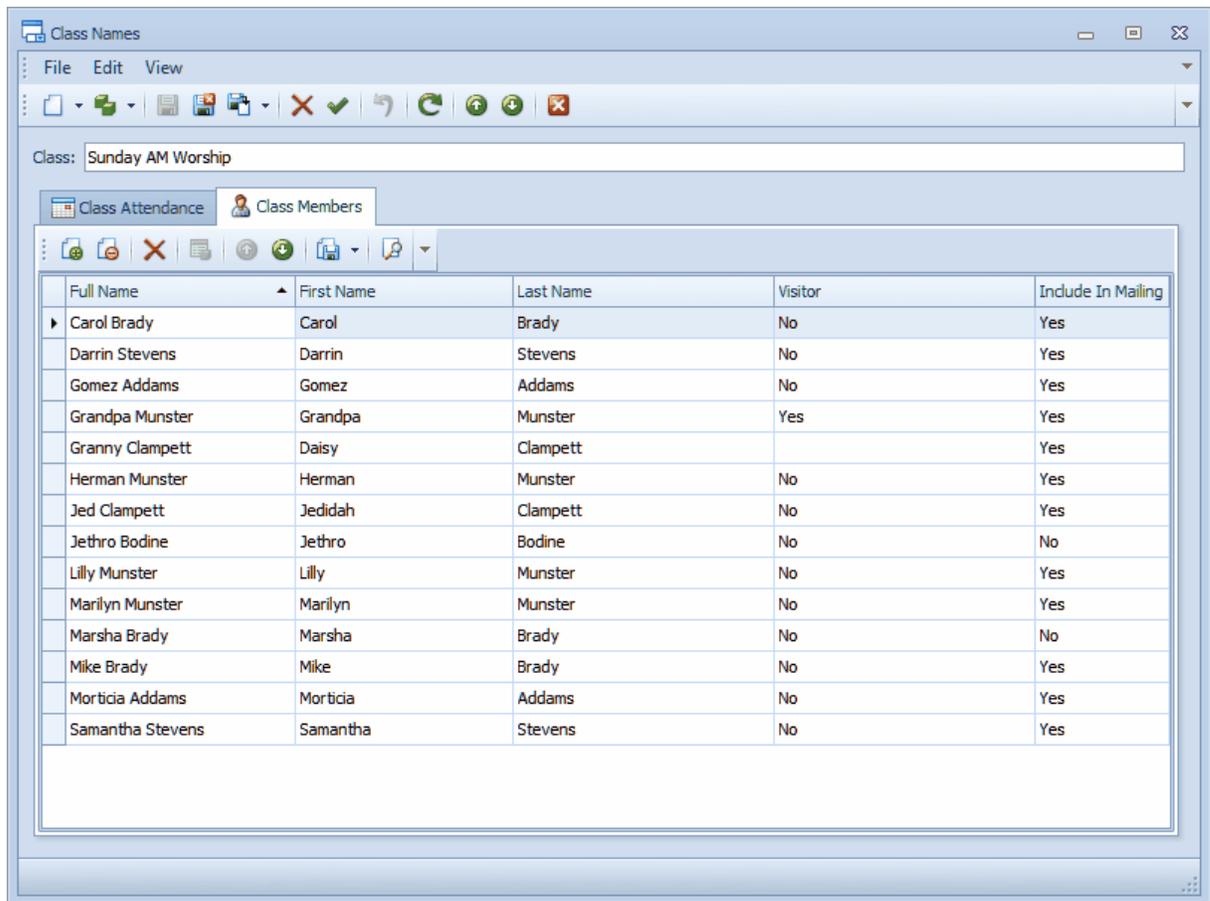
This grid is used to display member Class Names records.



| Class                       |
|-----------------------------|
| Sunday PM Service           |
| Sunday AM Young Adults      |
| Sunday AM Worship           |
| Sunday AM Senior Adults     |
| Sunday AM Middle Agers      |
| Sunday AM Kindergarten      |
| Sunday AM Junior High       |
| Sunday AM High School       |
| Sunday AM Cradle Roll       |
| Sunday AM College Students  |
| Sunday AM Adults            |
| Sunday AM 5th and 6th Grade |
| Sunday AM 4th Grade         |
| Sunday AM 3rd Grade         |
| Sunday AM 1st and 2nd Grade |
| Mid Week Young Adults       |
| Mid Week Service            |
| Mid Week Senior Adults      |
| Mid Week Middle Agers       |
| Mid Week Kindergarten       |
| Mid Week Junior High        |
| Mid Week High School        |
| Mid Week Cradle Roll        |
| Mid Week Adults             |
| Mid Week 5th and 6th Grade  |
| Mid Week 4th Grade          |
| Mid Week 3rd Grade          |

## 5.2 Class Names Record

In this screen you can view the Class Name (or Add, Change or Delete the Class Name) in the top part of the screen. In the lower part of the screen you can see the list of Members assigned to the class in one tab and the class attendance records in the other tab. To quickly add a class member click the link button (looks like a piece of paper with a + sign on it) then select the member name. Repeat as needed to add all the class members.



## 6 Events

Church Secretary for Windows 2014 incorporates a simple way for you to record church events, appointments including recurring appointments. You can create multiple "resources" and create a calendar for each. For example, you can add the Church Building as a resource and "link" it to events. You can also set up people as resources and add calendars for people like the Preacher, or Choir Director.

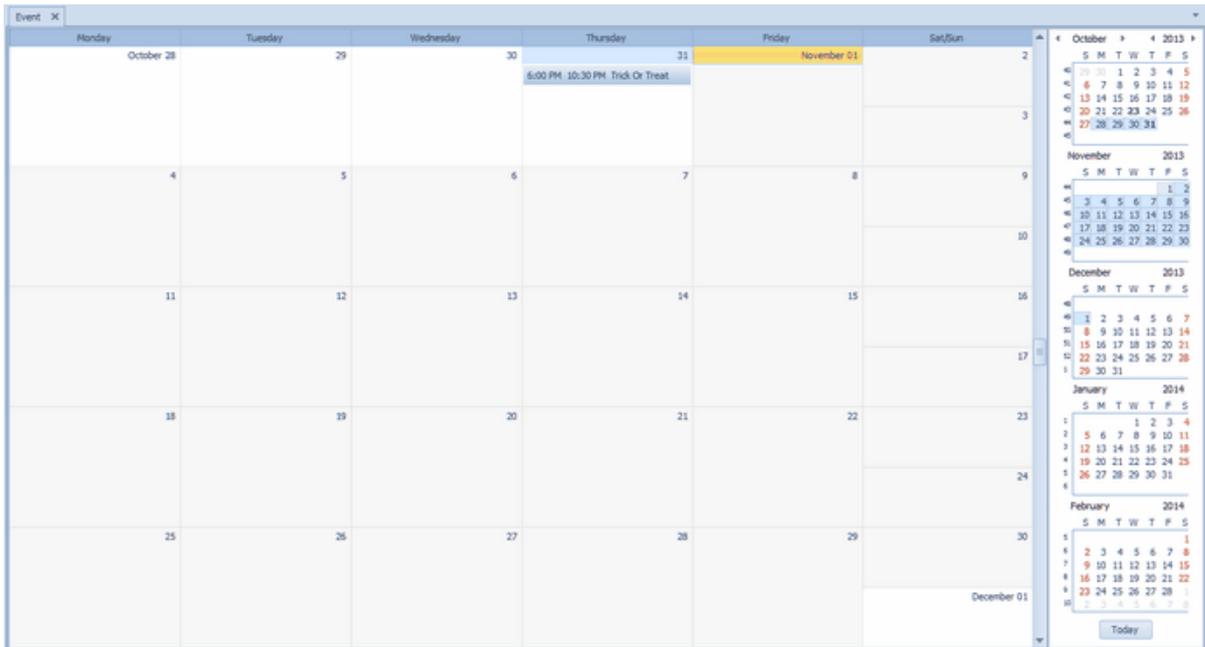
### 6.1 Event Views

Right click in any calendar view and a pop up menu will allow you to switch between multiple view of events. A pop up menu allows you to enter a new Appointment, an All Day event, or a recurring event. When you have created an appointment you can drag the item on the screen to move it to a different time or date. You can resize item to adjust the start or end of the appointment. You can also create resources - each of which will have their own calendar. I have a how to video on the web site at <http://www.churchsecretaryforwindows.com> that shows how to use the event calendar.

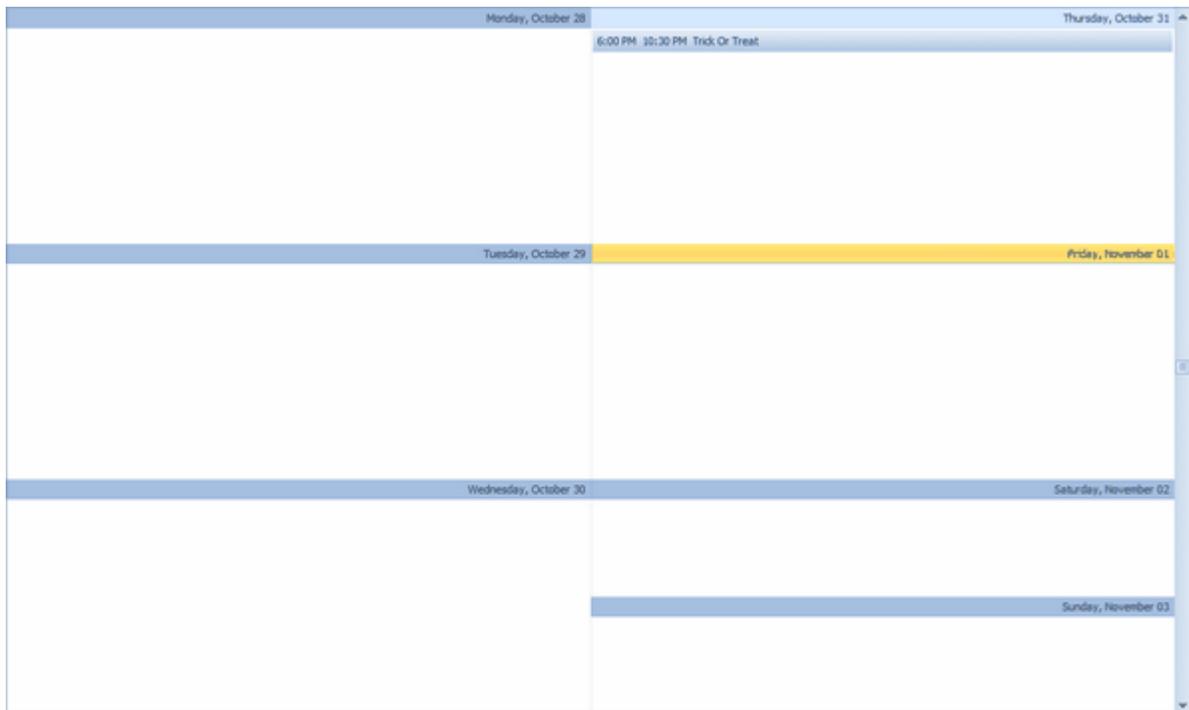
-  **New Appointment**
- New All Day Event
- New Recurring Event
- 
- Go to Today
-  Go to Date...
- 
- Change View To ▶

-  **Day View**
-  Work Week View
-  Week View
-  Month View
-  Timeline View

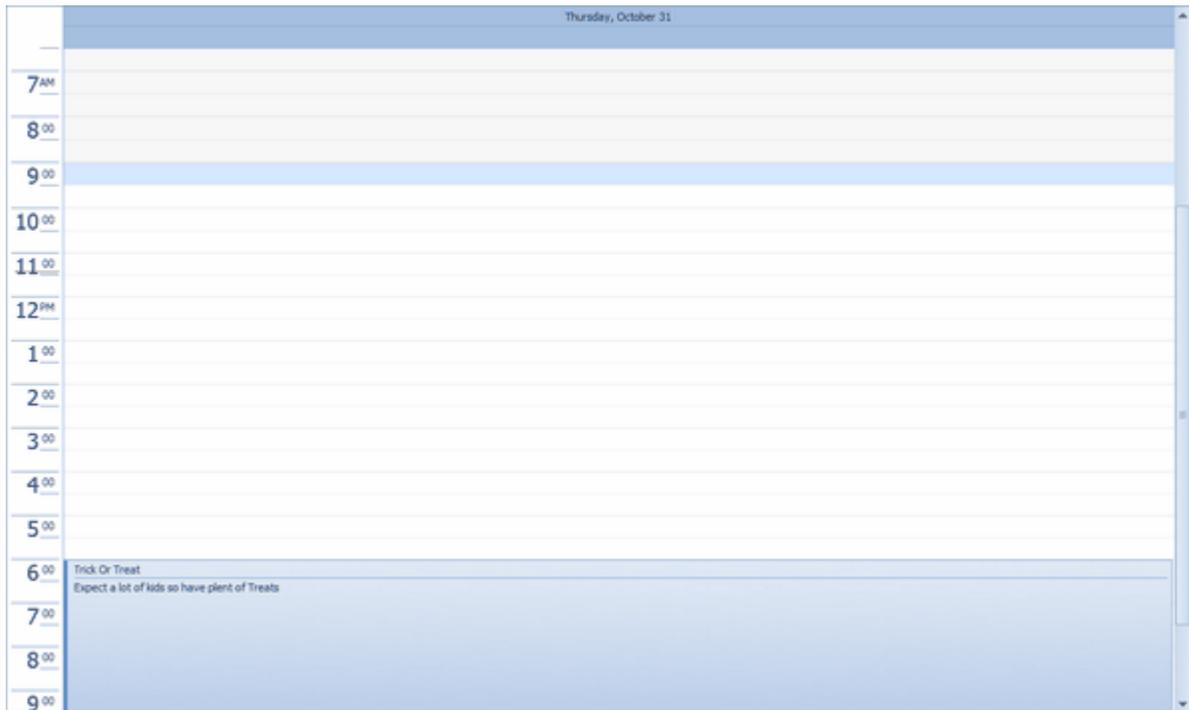
This view shows events in a Monthly view.



This view shows events in a Weekly View.



This view shows events in a Daily View.



## 7 Family Information

Church Secretary for Windows 2014 allows you to record information about items in your church library and to record and update the loan of library items.

## 7.1 Family Grid

This grid is used to display member attendance records. Like all grids you can sort rows by clicking on the column headings and filter by clicking the icon in the column header.

This grid shows family information in rows and columns like a spread sheet. You can sort on columns by clicking the column headings. You can right click a column header to choose from a variety of options to sort and filter the family records, as well as to choose the columns to display. You can right click in a cell in the grid for more options.

| Family Name          | Title        | Salutation               | First Name | Last Name | Mailing Address        | City        | State | Zip Code | Primary Phone | Alternate Phone | Email Address              | Group          | Zone  | Visitor |
|----------------------|--------------|--------------------------|------------|-----------|------------------------|-------------|-------|----------|---------------|-----------------|----------------------------|----------------|-------|---------|
| ▶ Addams Family      | The          | Dear Addams Family       | Gomez      | Addams    | 01 Cemetary Lane       | TV Land     | CA    | 90210    |               |                 |                            |                |       | No      |
| Andy Anderson Family | Mr. and Mrs. | Dear Andy and Family     | Andy       | Anderson  | 101 East 1st Street    | Some City   | CA    | 90299    |               |                 |                            |                |       | No      |
| Andy Andrews Family  | Mr. and Mrs. | Dear Andy and Ann        | Andy       | Andrews   | 222 East Second St...  | Some City   | CA    | 90299    |               |                 |                            |                |       | No      |
| The Brady Bunch      | Mr. and Mrs. | Dear Mike and Carol      | Mike       | Brady     | 2222 Whatever Str...   | TV Land     | CA    | 90210    | 999-111-2222  | 999-222-1111    | bradybunch@hotmail.com     | Sample group   | North | No      |
| The Clampetts        | Mr.          | Dear Jed and Yall        | Jedidah    | Clampett  | 1 Big Mansion          | Beverly ... | CA    | 90210    | 999-999-1234  |                 |                            |                | South | No      |
| The Munsters         | Mr. and Mrs. | Dear Munsters            | Herman     | Munster   | 1313 Mockingbird L...  | TV Land     | CA    | 90210    | 999-999-9999  |                 | herman.munster@ morgue.... | Middle Agers   | North | No      |
| The Stevens Family   | Mr. and Mrs. | Dear Darrin and Saman... | Darrin     | Stevens   | 1 Morning Glory Circle | TV Land     | CA    | 90210    | 999-111-3333  | 999-333-4444    | darrin@mcman-tate.com      | Young Marri... | East  | No      |

☒ [Visitor] = 'No' Edit Filter

## 7.2 Family Record

You should probably start using Church Secretary for Windows 2014 by adding Family Information. Each Family should have at least 1 member but may have many. When you first install the program the Family, Members and related screens - like Member Contributions and Class Attendance are blank. I have provided sample class names but you can delete those sample records. So lets begin by entering a family Record. The first field is for the Title (Mr., Mrs. Miss, Ms.) and this can be used for mailing labels and letters. The next field is the only field that is required on this screen - the Family Name. This field is used when adding related family member information. The field must also be Unique. The Salutation field is similar to the Title field. It can be used in letters as the Greeting. Fields are provided next for the Last Name and First Name. In some reports you may be fine using the family name, as in "The Brady Bunch" however, if you want to sort the Report if you used the Family name only you might have a lot of family names starting with "The" but if you use the Head of Household and enter a First Name and Last name for each family those fields can be used for sorting. Naturally the Mailing Address, City State and Zip code are provided for use in things like Mailing Labels and in the Family Directory. Right click inside the Photo area and you can use the load menu option to browse for an image of the photo. The actual image will be stored in the database after you save each record so you can browse to a photo from a CD or USB stick then after saving the record remove the USB or CD and your photo will still be available on screens and reports.

Fields are provided for entering a Primary and Alternate Phone numbers as well as an email address. Zone and Group fields are available for those that want to use those fields for sorting or filtering.

The Visitor field is a Yes or No choice but is important. In this version of Church Secretary for Windows I have not included a separate Visitors table. By entering Visitor information in the Family and Member table this information will be available when recording Class Attendance and

Contributions. Later, if the family and members become members of the church you don't have to enter their information all over again - just change the Visitor status from No to Yes.

Next I have provided a long field for entering any notes you would like to include.

The screenshot shows the 'Family' record for 'The Brady Bunch'. The form includes fields for Title, Family Name, Primary Phone, Alternate Phone, Salutation, Email Address, Last Name, First Name, Zone, Mailing Address, Group, City, State, Zip Code, and Visitor. A photo of the Brady family is displayed. A large text area for notes contains the text: 'This is a sample note about a sample family.'

At the bottom of the screen, the 'Members' grid is visible, showing a list of family members with their details.

| Full Name    | Title | First Name | Last Name | Primary Phone | Member Type     | Email Address         | Visitor |
|--------------|-------|------------|-----------|---------------|-----------------|-----------------------|---------|
| Carol Brady  | Mrs.  | Carol      | Brady     | 999-111-2222  | Adult           | CarolBrady@gmail.com  | No      |
| Greg Brady   | Mr.   | Greg       | Brady     | 999-111-2222  | College Student | gregbrady@hotmail.com | No      |
| Marsha Brady | Miss  | Marsha     | Brady     | 999-111-2222  | College Student | marshabrady@aol.com   | No      |

At the bottom of the screen you will see the members related (or Linked) to this family. You can add new members by using the Members Grid and adding a new member from there, or by clicking the New record icon at the bottom of the Family record screen.

## 8 Library Items

Church Secretary for Windows 2014 allows you to record information about items in your church library and to record and update the loan of library items.

### 8.1 Library Items Grid

This grid shows library information in rows and columns like a spread sheet. You can sort on columns by clicking the column headings. You can right click a column header to choose from a variety of options to sort and filter the library records, as well as to choose the columns to display. You can right click in a cell in the grid for more options.

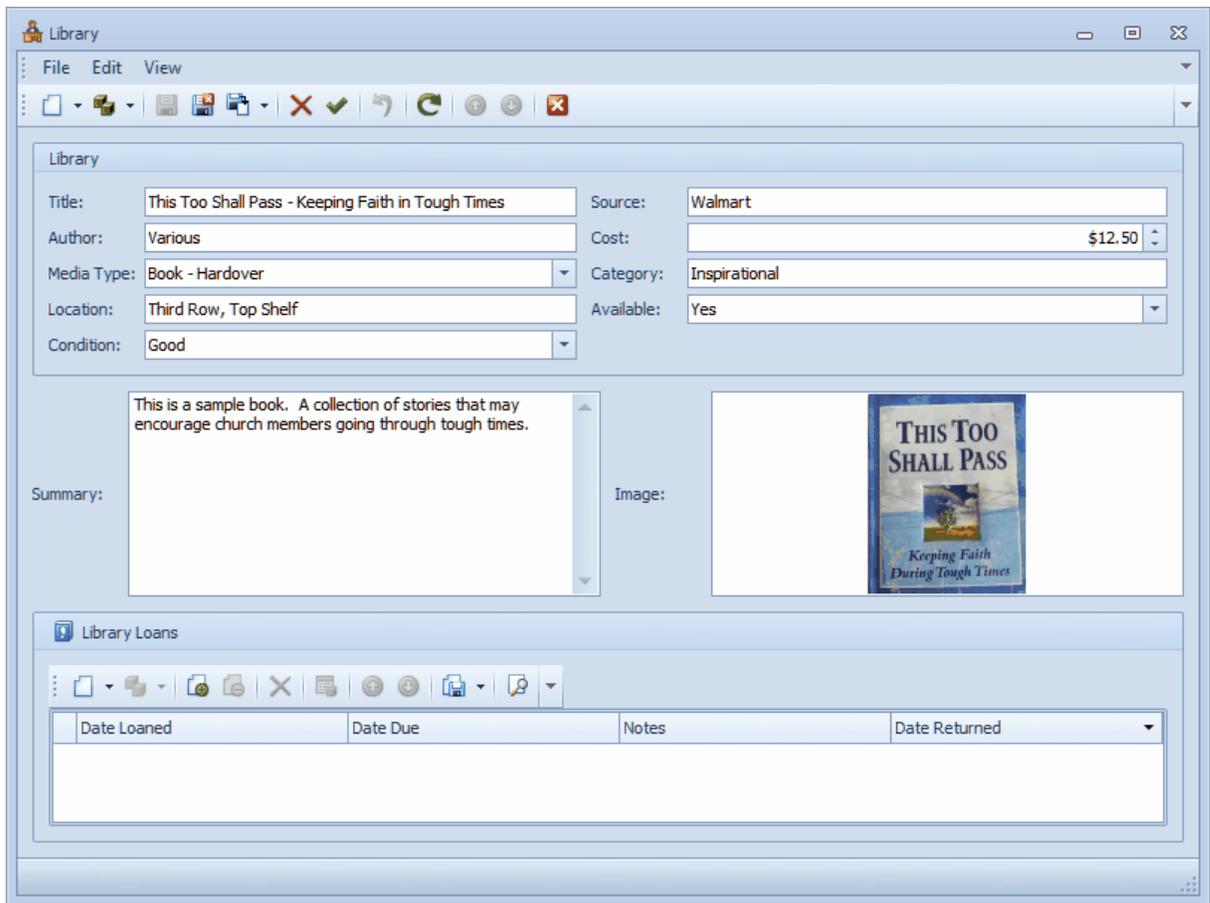
| Title                                        | Author     | Media Type       | Location                 | Condition | Source  | Cost    | Category      | Available | Image                                                                                                      |
|----------------------------------------------|------------|------------------|--------------------------|-----------|---------|---------|---------------|-----------|------------------------------------------------------------------------------------------------------------|
| Chicken Soup for The Soul                    | Various    | Book - Softcover | Third Row, Top Shelf     | Good      | Donate  | \$12.00 | Inspirational | Yes       |                                                                                                            |
| Chicken Soup for The Soul Stories to Op...   | Various    | Audio CD         | File Cabinet, 2nd Dra... | Good      | Donate  | \$0.00  | Inspirational |           |                         |
| Sample Library Item                          | John Jones | Book - Hardcover | Third Row, Top Shelf     | Fair      | Donate  | \$0.00  | Reference     | Yes       | Photo Not Available<br> |
| This Too Shall Pass - Keeping Faith in To... | Various    | Book - Hardcover | Third Row, Top Shelf     | Good      | Walmart | \$12.50 | Inspirational | Yes       |                                                                                                            |

[Media Type] = 'Audio CD' Edit Filter

Enter topic text here.

## 8.2 Library Items Record

Church Secretary for Windows 2014 let's you easily record on items you may have in your Church Library. The Title is the first thing you want to enter and it is required. The title is what is displayed when you add or change Library Loan items. You can then enter the Author or the book. Not all of the items in your library will be books. You can choose a Media Type for items such as DVD or VHS movies or Audio CD or Cassettes. You may find it helpful to enter a location for the item. You can choose the condition of the item from the drop down list. The source is another optional field where you can describe where the item was obtained (donation, Amazon, Walmart, etc.). You can then enter a cost for the item. You may want to enter a Category for the item such as Reference Material, Inspirational, etc. You may want to indicate whether or not the item is available. Finally, an area is provided for a summary of the item.



### 8.3 Library Loan Grid

| Date Loaned | Date Due   | Date Returned | Library                   | Notes                        |
|-------------|------------|---------------|---------------------------|------------------------------|
| 10/6/2013   | 10/18/2013 |               | Chicken Soup for The Soul | Sample note about item loan. |

## 8.4 Library Loan Record

This screen lets you record when a library item was loaned, when the item is due to be returned, and when it is actually returned. The Library item is the name of the item in the library inventory. You may also record notes about the item if you like, such as the condition when loaned and the condition returned. Finally, the person the item is loaned to is related to the Member's table.

The screenshot shows the 'Library Loans' form with the following data:

- Date Loaned: 10/5/2013
- Date Due: 10/18/2013
- Date Returned:
- Library: Chicken Soup for The Soul
- Notes: Sample note about item loan.

The 'Members' table below the form contains the following data:

| Full Name        | First Name | Last Name | Mailing Address   | Primary Phone | Alternate Phone | Email Address    |
|------------------|------------|-----------|-------------------|---------------|-----------------|------------------|
| Samantha Stevens | Samantha   | Stevens   | 1 Morning Glor... | 999-111-3333  |                 | samantha@wetc... |

## 9 Member Information

Church Secretary for Windows 2014 allows you to record a wide variety of information about your members

### 9.1 Member Information Grid

This grid shows member information in rows and columns like a spread sheet. You can sort on columns by clicking the column headings. You can right click a column header to choose from a variety of options to sort and filter the member records, as well as to choose the columns to display. You can right click in a cell in the grid for more options.

You can [customize the member grid](#) to show only the fields you want to view most often. Right click and choose the customize option and drag columns off the grid you don't want to see, drag columns to the grid to add them.

The screenshot shows the 'Member - Church Secretary For Windows 2014' application window. It features a menu bar (File, Edit, View, Tools, Help) and a toolbar. A search box is located at the top right. The main area contains a grid with the following columns: Full Name, Head Of Household, Family, Pledge Amount, Member Status, Marital Status, Member Type, First Name, Last Name, Birth Date, Mailing Address, Primary Phone, and Email Address. The grid lists 18 members, including Darrin Stevens, Samantha Stevens, Herman Munster, Lily Munster, Grandpa Munster, Mike Brady, Carol Brady, Jed Clampett, Granny Clampett, Gomez Addams, Morbica Addams, Tabitha Stevens, Marilyn Munster, Greg Brady, Marsha Brady, and Jethro Bodine.

| Full Name        | Head Of Household | Family             | Pledge Amount | Member Status | Marital Status | Member Type     | First Name | Last Name | Birth Date | Mailing Address        | Primary Phone | Email Address              |
|------------------|-------------------|--------------------|---------------|---------------|----------------|-----------------|------------|-----------|------------|------------------------|---------------|----------------------------|
| Darrin Stevens   | Yes               | The Stevens Family | \$200.00      | Active        | Married        | Adult           | Darrin     | Stevens   | 1/20/1940  | 1 Morning Glory Circle | 999-333-4444  | darrin@mcman-tate.com      |
| Samantha Stevens | No                | The Stevens Family | \$0.00        | Active        | Married        | Adult           | Samantha   | Stevens   | 9/1/1940   | 1 Morning Glory Circle | 999-111-3333  | samantha@witdmail.com      |
| Herman Munster   | Yes               | The Munsters       | \$75.00       | Active        | Married        | Adult           | Herman     | Munster   | 5/23/1930  | 1313 Mockingbird L...  | 999-9999      | herman.munster@ morgue.com |
| Lily Munster     | No                | The Munsters       | \$75.00       | Active        | Married        | Adult           | Lily       | Munster   | 3/23/1930  | 1313 Mockingbird L...  | 999-9999      | lily.munster@hotmail.com   |
| Grandpa Munster  | No                | The Munsters       | \$0.00        | Inactive      | Widowed        | Adult           | Grandpa    | Munster   | 5/23/1890  | 1313 Mockingbird L...  | 999-9999      |                            |
| Mike Brady       | Yes               | The Brady Bunch    | \$200.00      | Active        | Married        | Adult           | Mike       | Brady     | 3/23/1953  | 2222 Whatever Str...   | 999-111-2222  | mikebrady@live.com         |
| Carol Brady      | No                | The Brady Bunch    | \$0.00        | Active        | Married        | Adult           | Carol      | Brady     | 4/5/1952   | 2222 Whatever Str...   | 999-111-2222  | CarolBrady@gmail.com       |
| Jed Clampett     | Yes               | The Clampetts      | \$500.00      | Inactive      | Widowed        | Adult           | Jedidah    | Clampett  |            | 1 Big Mansion          | 999-999-1234  |                            |
| Granny Clampett  | No                | The Clampetts      | \$0.00        | Inactive      | Widowed        | Adult           | Daisy      | Clampett  |            | 1 Big Mansion          | 999-999-1234  |                            |
| Gomez Addams     | Yes               | Addams Family      | \$600.00      | Active        | Married        | Adult           | Gomez      | Addams    |            | 1 Cemetary Lane        |               |                            |
| Morbica Addams   | No                | Addams Family      | \$0.00        | Active        | Married        | Adult           | Morbica    | Addams    |            | 1 Cemetary Lane        |               |                            |
| Tabitha Stevens  | No                | The Stevens Family | \$0.00        | Active        | Single         | Child           | Tabitha    | Stevens   | 4/14/1962  | 1 Morning Glory Circle | 999-111-3333  |                            |
| Marilyn Munster  | No                | The Munsters       | \$0.00        | Active        | Single         | College Student | Marilyn    | Munster   | 3/23/1948  | 1313 Mockingbird L...  | 999-9999      | marilynmunster@singles.com |
| Greg Brady       | No                | The Brady Bunch    | \$0.00        | Active        | Single         | College Student | Greg       | Brady     | 5/2/1962   | 2222 Whatever Str...   | 999-111-2222  | gregbrady@hotmail.com      |
| Marsha Brady     | No                | The Brady Bunch    | \$0.00        | Active        | Single         | College Student | Marsha     | Brady     | 3/5/1972   | 2222 Whatever Str...   | 999-111-2222  | marshabrady@aol.com        |
| Jethro Bodine    | No                | The Clampetts      | \$0.00        | Active        | Single         | College Student | Jethro     | Bodine    |            | 1 Big Mansion          | 999-999-1234  | jethro@hotmail.com         |

## 9.2 Member Information Record

Church Secretary for Windows 2014 allows you to record a wide variety of information about Church Members (the same screen can be used to enter information about each Visitor - just change the visitor from a Yes to a No. You can use this visitor field to filter grids and reports.)

Start by entering the person's Full Name. This can be any format you like, but most will enter this as the First Name MI Last Name. Next, select the Family the member belongs to from the drop down list (or click New if you have not already added the family information. The Title is what you use most often for printing on Labels. The First Name, Last Name, Mailing address, City, State and Zip Code fields should all be self explanatory. Two phone number fields are provided. One may be used for the home phone and another for a cell phone or work number. Of course you can also record each member's email address. You may next want to enter demographic information such as the member's Marital Status, their Member Status (Active or Inactive for example) and a Member Type (such as Adult, Child, College Student).

I have provided fields for important dates. You may also want to indicate whether or not a member is designated as a head of household. An option is provided to let you indicate whether or not to include this member in mailings. For example, you may not want to print mailing labels for both a husband and wife, so you can choose to print mailing labels for only those with a Yes in the Include in Mailing. You may indicate whether the member is a regular giver or not. This can be helpful in planning purposes, especially if the member will pledge a regular contribution amount. Some churches use Envelopes with numbers for each member. I have included hits as an option. I have included a large field for recording an notes about a member.

At the bottom of the Member Records screen are tabs for information related to each member. You may update this information using the grid at the bottom or using the grid dedicated for the related information such as contributions or attendance. Either way, it can be helpful to see all the related member information on one screen.

Samantha Stevens - Member

File Edit View

Member

Full Name:  Birth Date:  Baptism Date:

Family:  Graduation Date:  Wedding Date:

Title:  Date Joined:

First Name:  Head Of Household:  Include In Mailing:

Last Name:  Regular Giver:  Envelope:

Mailing Address:  Pledge Amount:

City:  Visitor:

State:  Zip Code:

Primary Phone:

Alternate Phone:

Email Address:

Marital Status:

Member Status:

Member Type:



Notes:

Member Attendance Class Names Member Contributions Prayer Requests Library Loans To Member Member Talents

| Class Date | Member           | Class Names       | Present |
|------------|------------------|-------------------|---------|
| 10/27/2013 | Samantha Stevens | Sunday AM Worship | Yes     |
| 10/13/2013 | Samantha Stevens | Sunday AM Worship | Yes     |
| 10/6/2013  | Samantha Stevens | Sunday AM Worship | Yes     |

## 10 Prayer Requests

Church Secretary for Windows 2014 allows you to easily record, update and print prayer requests.

### 10.1 Prayer Requests Grid

This grid shows library information in rows and columns like a spread sheet. You can sort on columns by clicking the column headings. You can right click a column header to choose from a variety of options to sort and filter the library records, as well as to choose the columns to display. You can right click in a cell in the grid for more options.

| Date Requested | Status | Category           | Person(s) Affected | Requested By     |
|----------------|--------|--------------------|--------------------|------------------|
| 10/23/2013     | New    | Spiritual Concerns | Samantha Stevens   | Samantha Stevens |
| 10/6/2013      | New    | Health             | Grandpa Munster    | Grandpa Munster  |

## 10.2 Prayer Requests Record

This screen simply let's you enter the date a prayer was requested, select the member or visitor requesting the prayer, the Status and category of prayer and the person or persons affected. Finally, enter the details of the prayer request and any additional information.

Prayer

File Edit View

Date Requested: 10/6/2013 Person(s) Affected: Grandpa Munster

Requested By: Grandpa Munster

Status: New

Category: Health

Description:

Grandpa is concerned about his failing health. This may be expected for someone over 300 years old, but he is still taking it pretty hard. Bothered that his spells are not working as well as they used to when he was younger.

This is just a sample for testing reports. Grandpa is concerned about his failing health. This may be expected for someone over 300 years old, but he is still taking it pretty hard. Bothered that his spells are not working as well as they used to when he was younger. This is additional information.

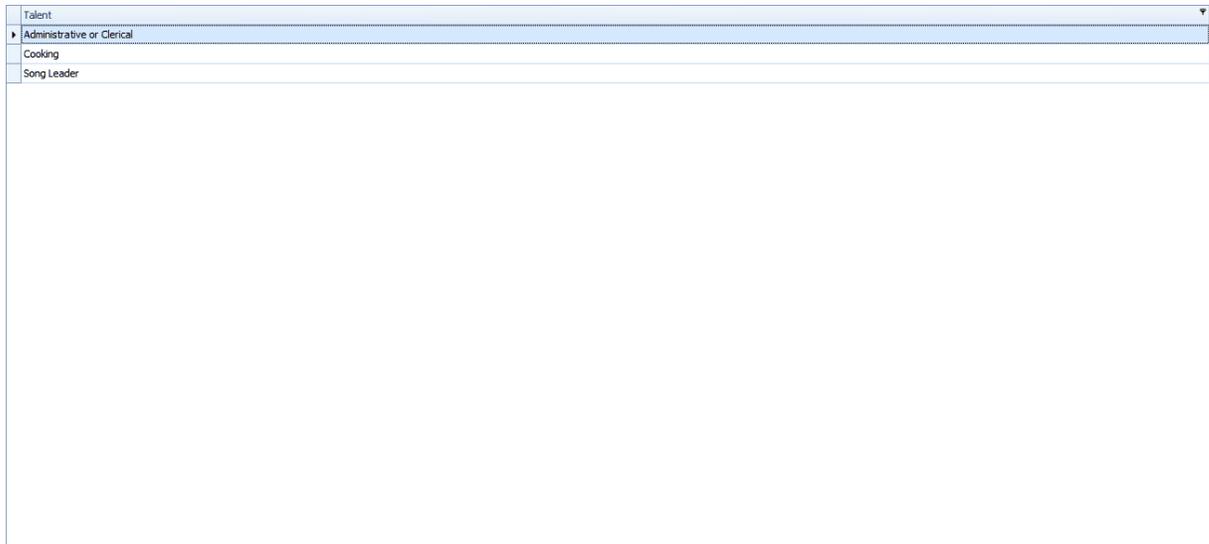
Additional Information:

## 11 Talents

You may find it helpful to keep track of which members have which talents. Church Secretary for Windows 2014 allows you to do that.

### 11.1 Talents Grid

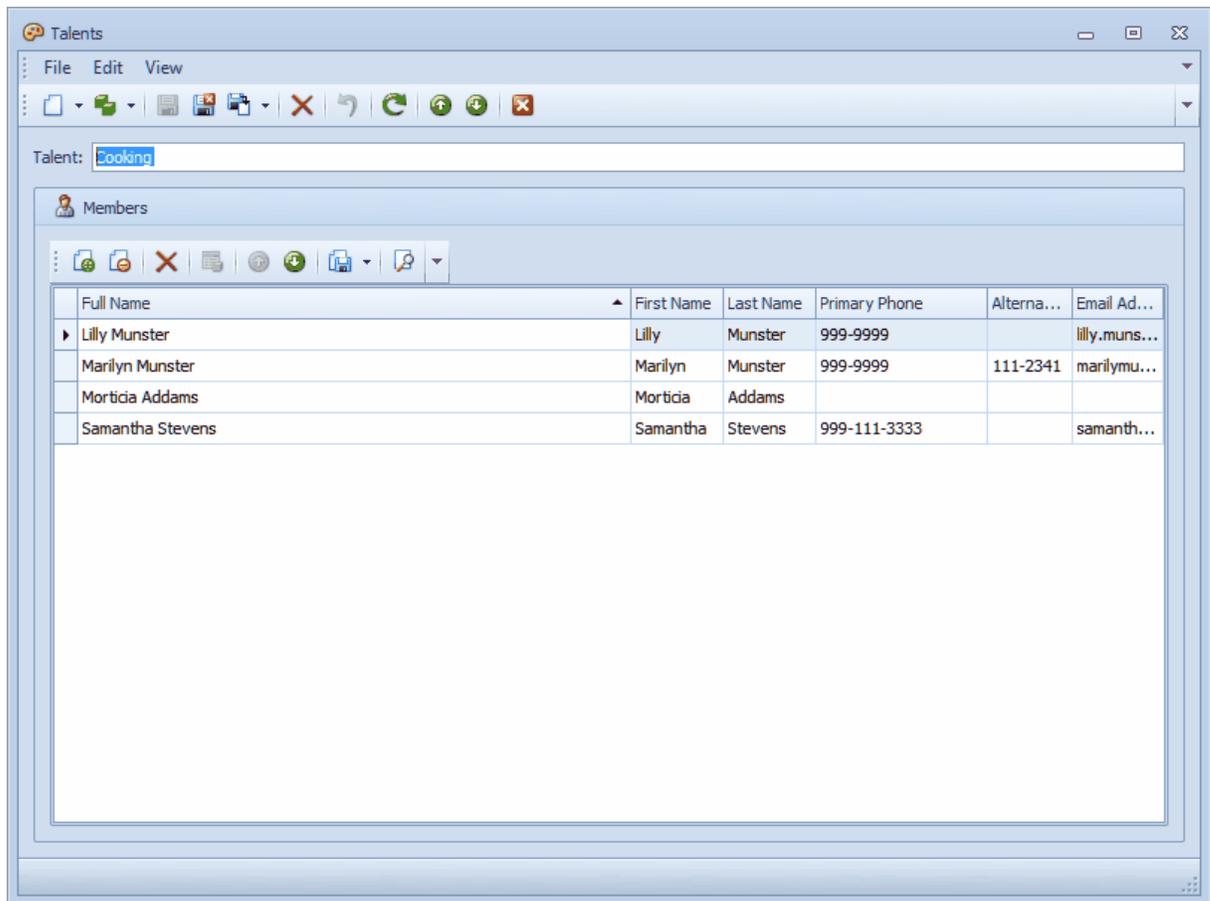
This screen lists member talents.



| Talent                     |
|----------------------------|
| Administrative or Clerical |
| Cooking                    |
| Song Leader                |

### 11.2 Talents Record

This screen lists member talents and at the bottom of the screen members that possess that talent. You can click the Link button to associate a member with a talent.



## 12 Reports

I have included a wide variety of reports and charts.

### 12.1 Reports and Charts

I have included a variety of reports with Church Secretary for Windows 2014. You can see some of them in the grid below. These reports and charts can be sorted on report name or report data type, you can search for example by entering the word Photo or Chart to find a specific report type. You can double click the report to preview it or you can Clone it (make a copy of a report) to change the design or create your own report from scratch.

| Report Name                                                                       | Data Type     |
|-----------------------------------------------------------------------------------|---------------|
| Attendance by Member                                                              | Attendance    |
| Attendance by Member - Select Member From List                                    | Attendance    |
| Attendance by Class Name                                                          | Attendance    |
| Attendance by Class Name - New Page After Class                                   | Attendance    |
| Attendance by Class Name - Select Entered Class Name                              | Attendance    |
| Attendance Bar Chart - Class and Date                                             | Attendance    |
| Attendance Bar Chart - By Date Column Chart (all classes)                         | Attendance    |
| Absentee List                                                                     | Attendance    |
| Class Attendance List - Present only                                              | Attendance    |
| Attendance by Class Name - Select Class Date                                      | Attendance    |
| Class Roster                                                                      | Class Names   |
| Class Roster - Select Entered Class Name                                          | Class Names   |
| Contributions by Member                                                           | Contributions |
| Contributions by Member - Select Member                                           | Contributions |
| Contributions by Date - Bar Chart                                                 | Contributions |
| Contributions by Fund Pie Chart                                                   | Contributions |
| Contributions by Fund Pie Chart - Date Range                                      | Contributions |
| Contribution Receipt                                                              | Contributions |
| Contribution Receipt Select Member                                                | Contributions |
| Contributions by Member - Select Date                                             | Contributions |
| Family Contact List with Photo                                                    | Family        |
| Family Contact List without Photo                                                 | Family        |
| Family Labels - Avery 5160                                                        | Family        |
| Family Details Report - 1 Family Per Page                                         | Family        |
| Family Directory - Initial from Last Name emphasized                              | Family        |
| Family Directory - Initial from Last Name emphasized - with Photo - Landscape     | Family        |
| Family Directory - Initial from Last Name emphasized - with Photo - Portrait Page | Family        |

When you double click a report name the report will be shown in Preview mode. You have the ability to Export the report in a variety of common file formats, or attach the report to an email. You can zoom in or out and search for text in the report.

**Receipt for Charitable Contributions**

Mr. Mike Brady  
2222 Whatever Street  
TV Land, CA 90210

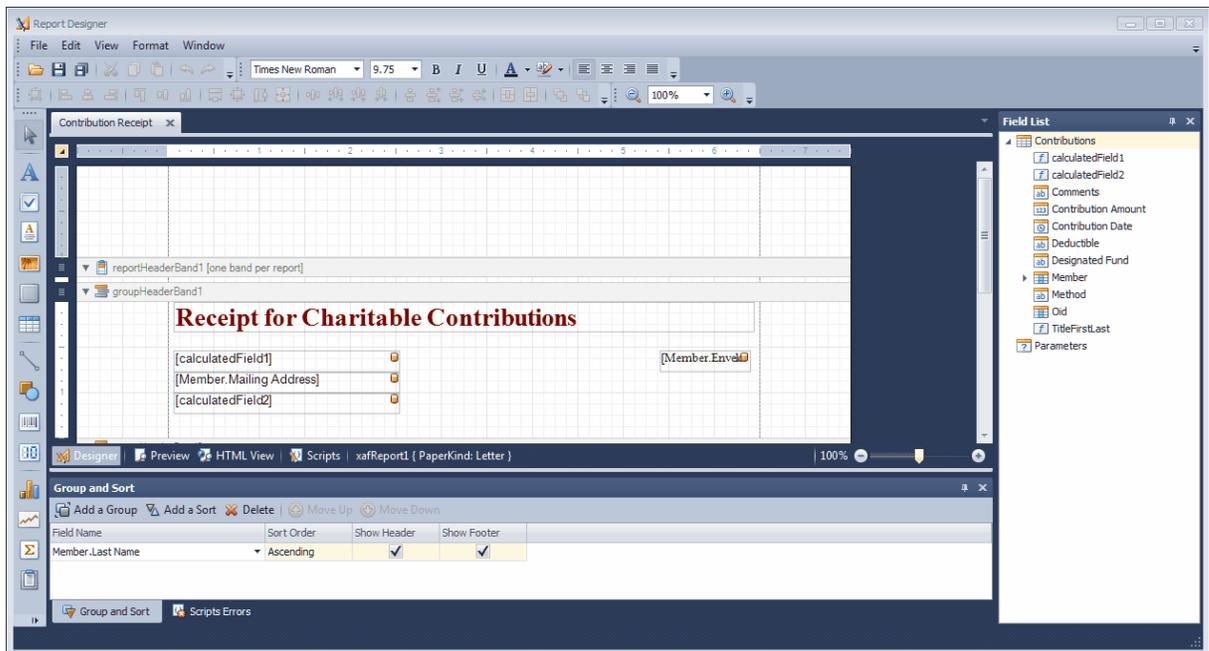
| Contribution Date | Contribution Amount | Designated Fund | Method |
|-------------------|---------------------|-----------------|--------|
| 9/15/2013         | \$125.00            | General         | Check  |
| 8/25/2013         | \$125.00            | General         | Check  |
| 9/15/2013         | \$45.00             | Other           | Check  |
| 9/1/2013          | \$45.00             | Other           | Check  |
| 9/8/2013          | \$125.00            | General         | Check  |
| 8/18/2013         | \$125.00            | General         | Check  |
| 9/22/2013         | \$125.00            | General         | Check  |
| 9/8/2013          | \$45.00             | Other           | Check  |
| 8/4/2013          | \$125.00            | General         | Check  |
| 9/1/2013          | \$125.00            | General         | Check  |
| <b>Sum</b>        | <b>\$1,010.00</b>   |                 |        |

Page 1 of 4 | 100%

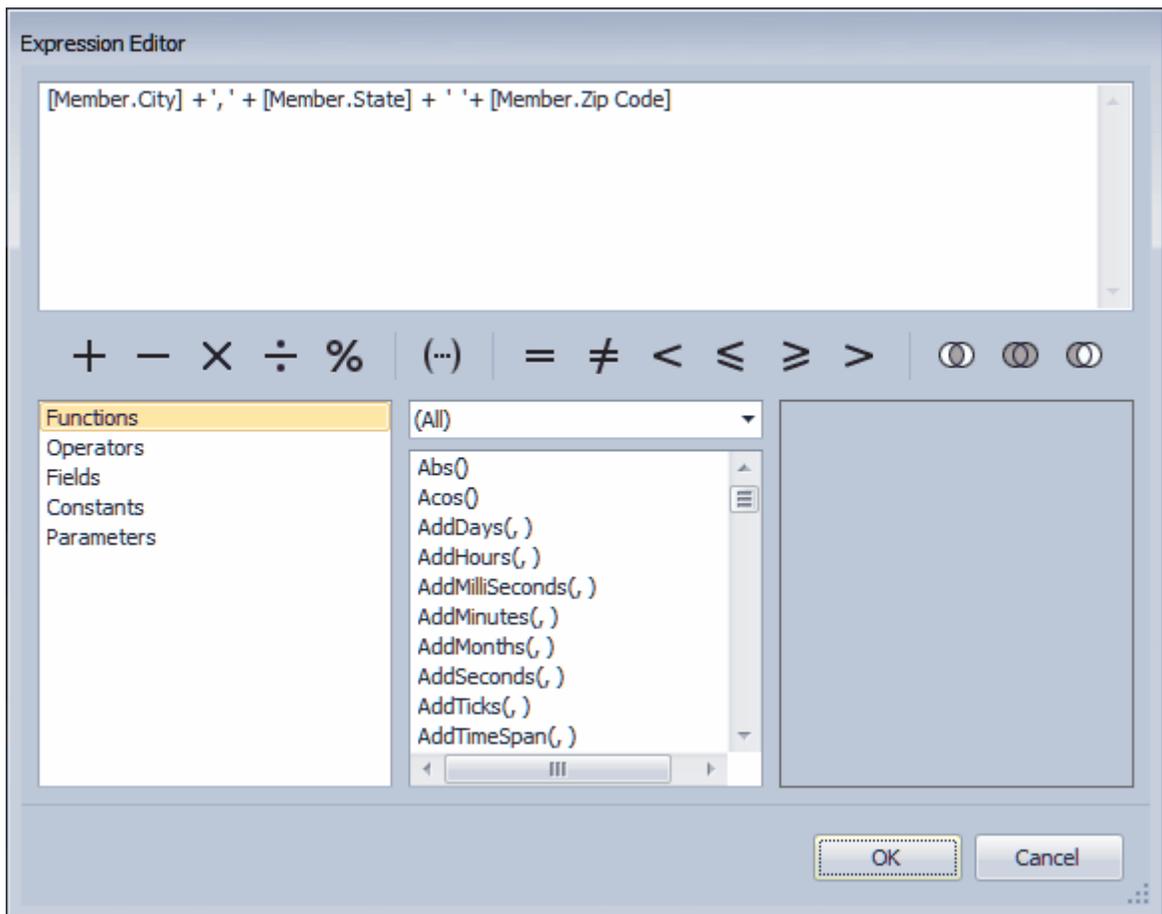
Notice the fourth button from the right. This will let you open the report in design view. The first button from the left will let you create a new report and the second button from the left will let you clone (copy) the selected report and you can then change the copied report leaving the original report in place.



In the screen shot below you can see the report in design view. Notice you can create calculated report fields and drag and drop them on to the report like a regular field.



The screen shot below shows a calculate report field expression.



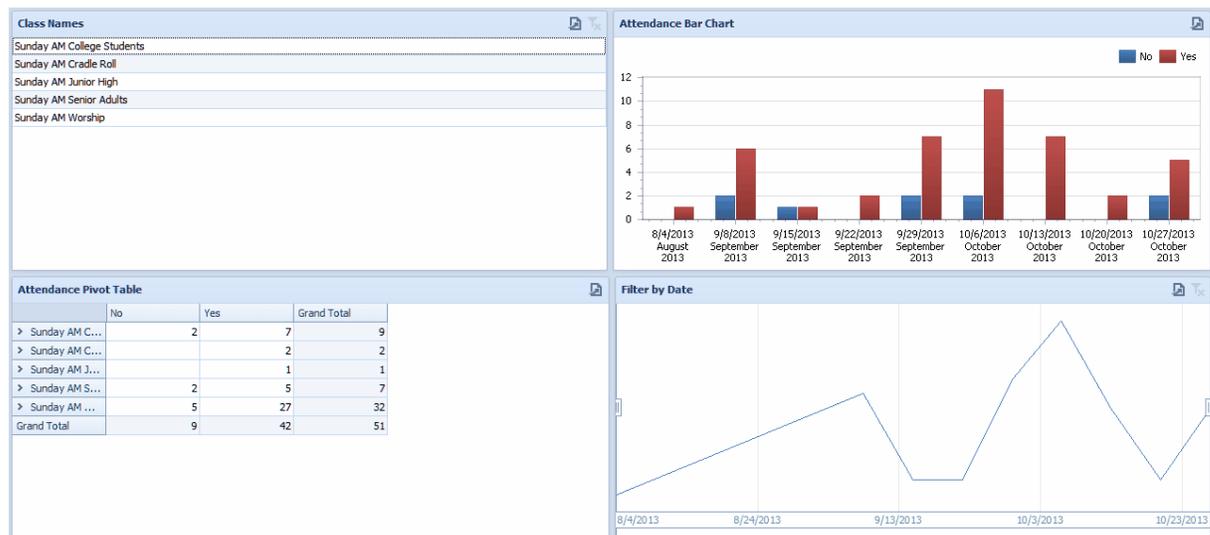
Additional documentation is available covering the Report designer and other topics. Just email me at [dbandsons@aol.com](mailto:dbandsons@aol.com) for a download link. It is over 10 megabytes so be aware it will may take a while to download. You may also want to visit the web site at <http://www.churchsecretaryforwindows.com> to watch videos on how to customize and create reports.

## 13 Dashboards

Dashboards are provided to give you an overview of contributions, attendance and demographics.

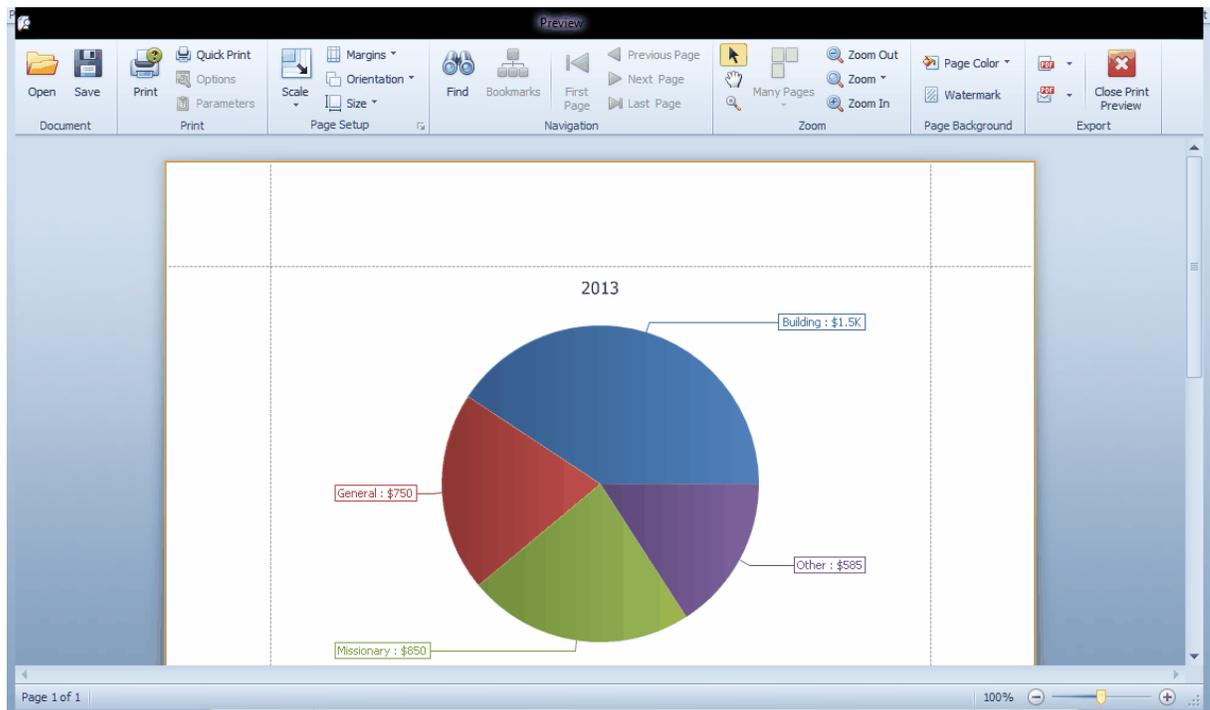
### 13.1 Attendance Dashboard

The attendance dashboard will let you quickly view attendance trends. You can filter the attendance displayed by dragging the handles in the lower right quadrant to cover a longer or shorter period of attendance. A Pivot Table in the lower left of the dashboard let's you view how many were present (or absent) for each class and date. The grid of class names at the top left section will let you filter the dashboard for a selected class. The bar chart at the top right gives you a quick bird's eye view of attendance trends. You can easily print the entire dashboard or individual components.



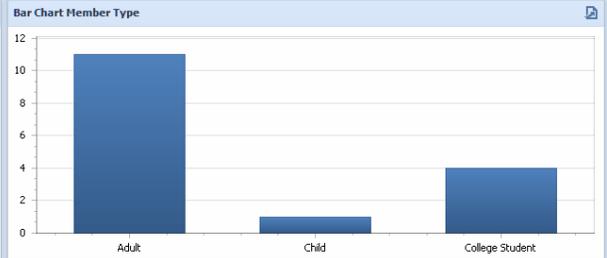
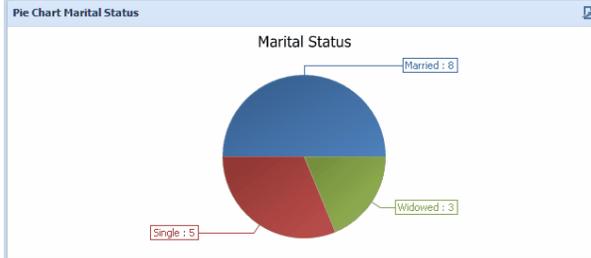
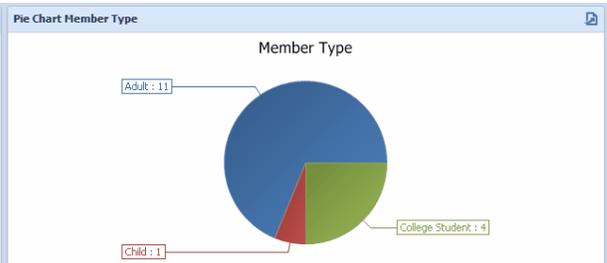
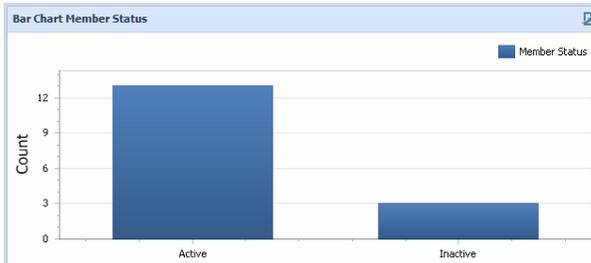
## 13.2 Contributions Dashboard

The Contributions Dashboard lets you easily view contributions, and fund contributions over a period of time. The dashboard is interactive so for example, you can drill down by clicking on slices of the pie chart to see contributions for the Year, Month, and so on. In the lower right quadrant there is a date range filter so you can drag handles on the right or left to change the contribution dates displayed.



## 13.3 Demographics Dashboard

The Demographics Dashboard is not interactive. It just gives you a quick view of the member types and member statuses and marital statuses of your church at any given time.



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