Ministry Guide

Pastor

churchtrac

Introduction

The job of a Pastor requires extreme flexibility paired with bold leadership. Preaching and sermon prep is just a small part of what you do. You may be called to visit guests, perform counseling, officiate a funeral, disciple a new believer, or even facilitate a leadership meeting. Senior Pastors are very rarely confined to a singular task.

The scope of your responsibilities as a Pastor will determine what features of ChurchTrac you primarily use. If you're a Senior Pastor with other staff or volunteers to delegate the workload to, you may find yourself primarily using the People Screen. If you manage the majority of the church operations, you will be using every core ChurchTrac Feature.

To make ChurchTrac easy-to-use, we have organized the software into 6 different sections or "Screens" which you can navigate. These screens include:

1. Home/Dashboard
2. People/Families
3. Events/Attendance
4. Worship/Scheduling **Plus Plan Only*
5. Giving/Pledges
6. Accounting/Budgets **Plus Plan Only*
7. Settings

From each of these screens, you find unique features that apply to those particular pieces of the software. For example, the Attendance Screen is where you can find features such as Attendance Reports, Live Mode, and Check-In-Mode. Likewise, if you navigate to the Events Screen, you will find features like Edit Calendars, Edit Locations, Export Calendar, and Public Calendar.

Due to the fact that most Pastors spend the bulk of their time on the People Screen, that is going the be the primary focus of this overview. We will focus on the core functionalities of the People Screen and how you as a Pastor can use them to help you accomplish the mission of your church.

Relationships

"Not everyone who says to me, 'Lord, Lord,' will enter the kingdom of heaven, but the one who does the will of my Father who is in heaven. On that day many will say to me, 'Lord, Lord, did we not prophesy in your name, and cast out demons in your name, and do many mighty works in your name?' And then will I declare to them, 'I never knew you; depart from me, you workers of lawlessness.'

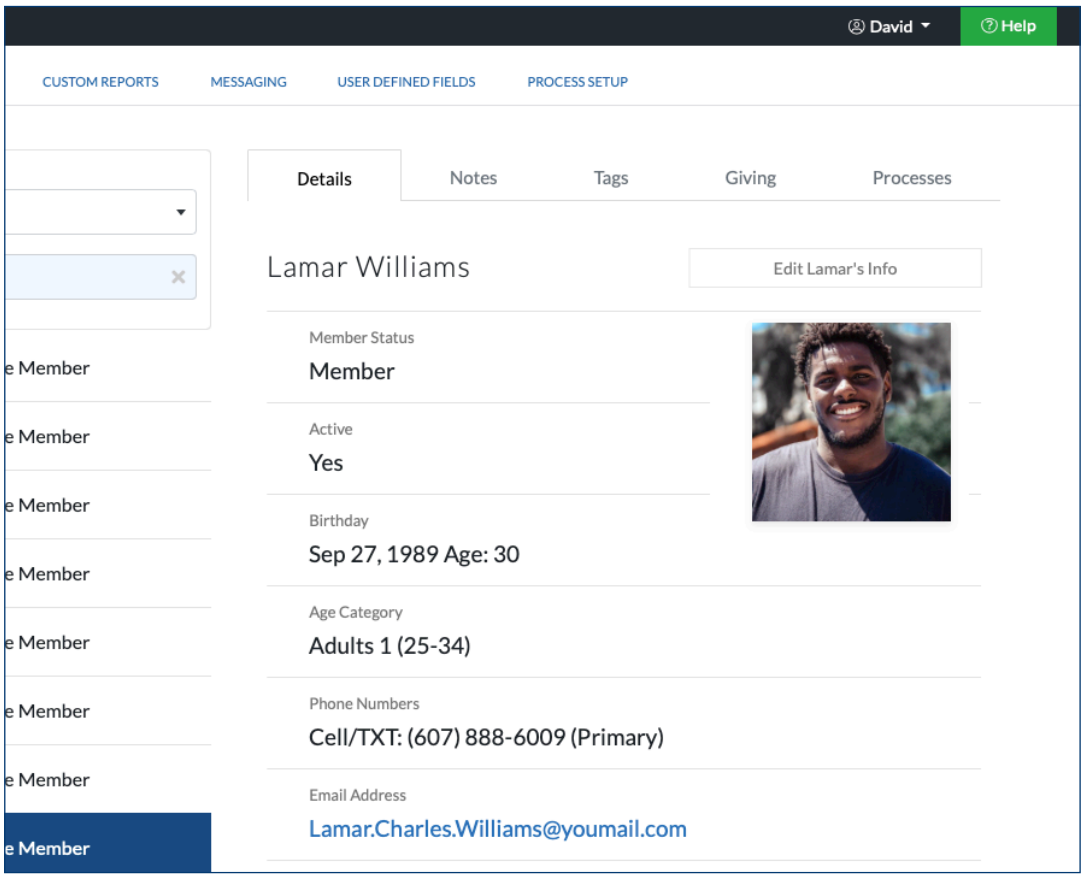
Matthew 7:21-23

These professors of religious law knew and recited the Word of God. Despite this, they only had the head knowledge of Jesus. The relationship was one sided. Jesus was right there in front of their faces offering the opportunity for them to know him personally…and they rejected him.

As a Pastor, creating and building relationships between us, our people, and Jesus is what we do. For many pastors, the hard part isn't actually creating and building the relationships; It's keeping track of all of them.

People

Keeping track of your people is vital to the church's health. It's important to know about your people and know them personally. You need to have an all-in-one place where you store basic information about each person.



If you were already using a Church Management Software or have some sort of spreadsheet with all your people, ChurchTrac can do a Data Import to save you a great deal of time. To have us do a Data Import for you, go to www.churchtrac.com/support and look up the Data Import instructions in our Online User Manual.

If this is the first time you're adding your people into some sort of database or digital format, simply proceed in adding each person manually.

Basic Information

Question #1: What information do you want to record for your people?

A few years back, Google had a video in which they showed how their web search feature was able to help a farmer in Kenya save his crops. His newly planted potatoes unexpectedly started to die. He was able to do a quick internet search to help him determine that ants were the root cause of

his crops dying. This helped him find the remedy for his dilemma and have a successful harvest for his village. At the end of the video, he said that *"Information is powerful, but it is how we use it that will define us"*.

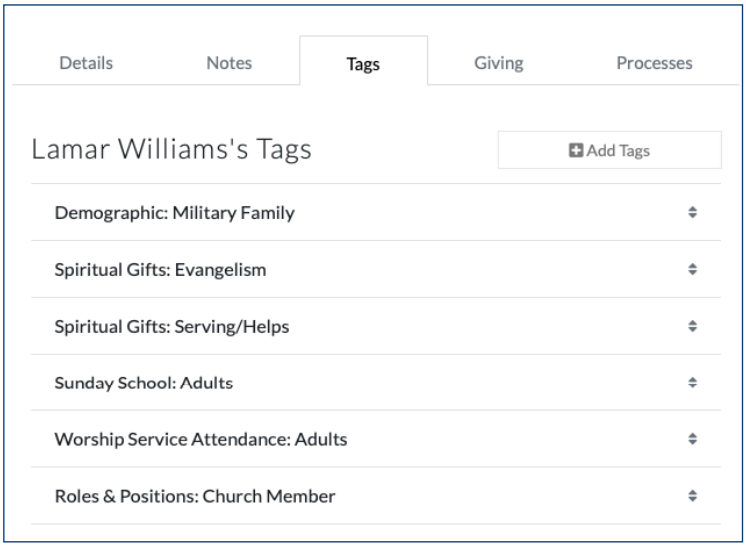
Determining what information you want to record for your people is important in helping you minister to them. Much like that potato farmer, how you use that information will define you and your ministry. Here are some great examples of different types of information and how you can use it:

- Knowing how many children and their ages of each family so you can determine if there is a need to create more children's classes.
- Knowing where each family lives so you can decide the best geographical spots to hold home bible studies.
- Having each members email address so you can keep them in the loop with a monthly email.
- Recording the cell phone number of a visitor so you can reach out to them on a visitation.
- Knowing the date of a visitors first visit to help you determine if they are still an active visitor.

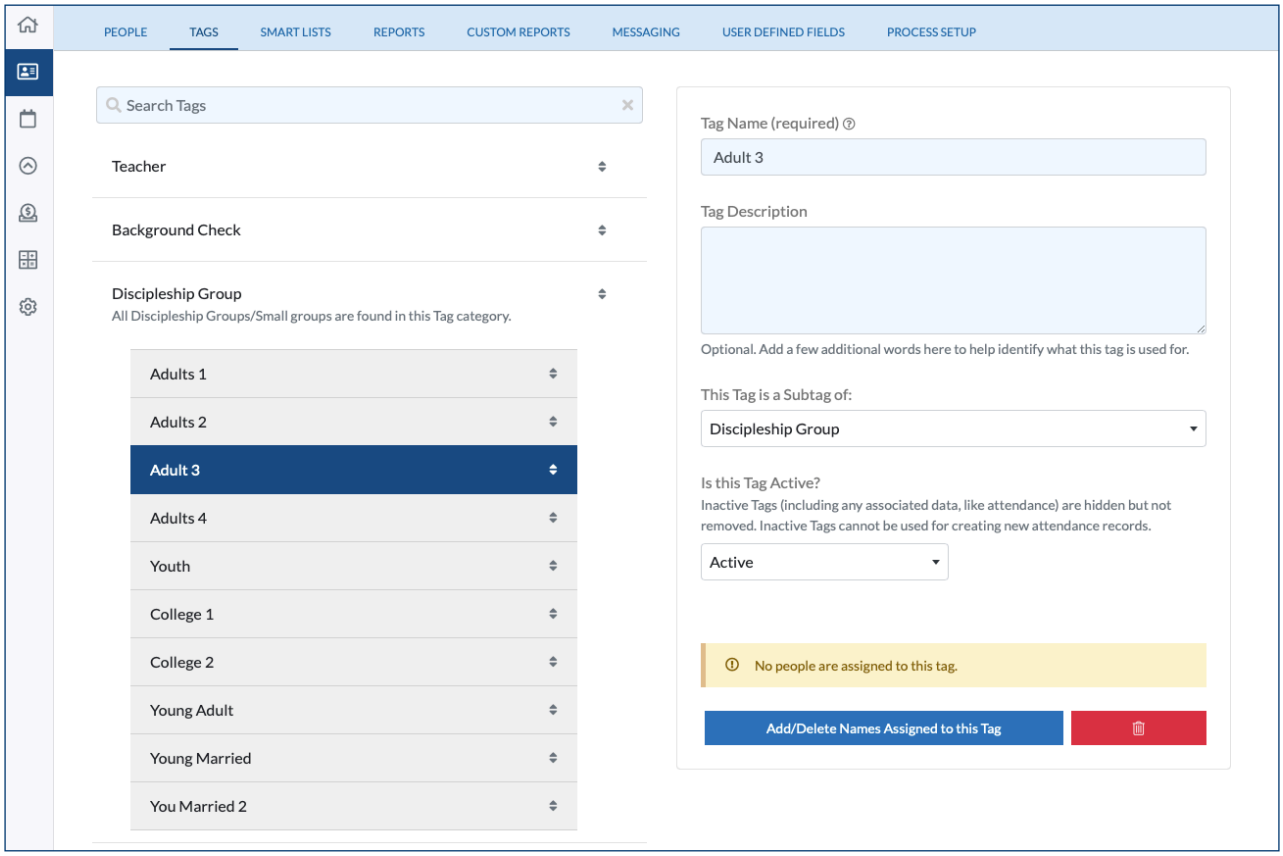
These are just a few of the many great examples of why it is important to store basic information about your people. If you have not already done so, we encourage you to create a game plan of what basic information you want to gather for the people at your church/ministry.
As you add your information on the **People Screen**, you may find that you need to add special fields for an individual. These are called "**User-Defined Fields**". Because every church/ministry is different, we recognized a long time ago that you need to have the ability to create your own. Once a User-Defined Field is made, it will be visible in your "Details" tab for each person.

Tags

Tags are the foundation for organizing your people into groups, knowing their areas of service, and tracking their attendance. A Tag is like a label that you apply to a person, and you can create a tag for just about anything! For example, you might want to have a tag to indicate who is a leader, a greeter, a teacher, or who is in a particular Bible study group. You can quickly find names that have a specific tag, or use tags to track a group's attendance.



In the following example, we have several Tags assigned to our church member Lamar. These Tags help us know more about Lamar so we can know how to serve him while also knowing how we can connect Lamar to a ministry that lets him best exercise his spiritual gifts and abilities. Tags are how you can organize your Sunday School, Discipleship Groups, Ministry Teams, Spiritual Gifts and more. You can have any number of people assigned to a Tag as well.



You can also create sub-tags that will be "children" to their "parent" Tag. For example, you may create a parent Tag named "Sunday School" and have various classes as sub-tags underneath.

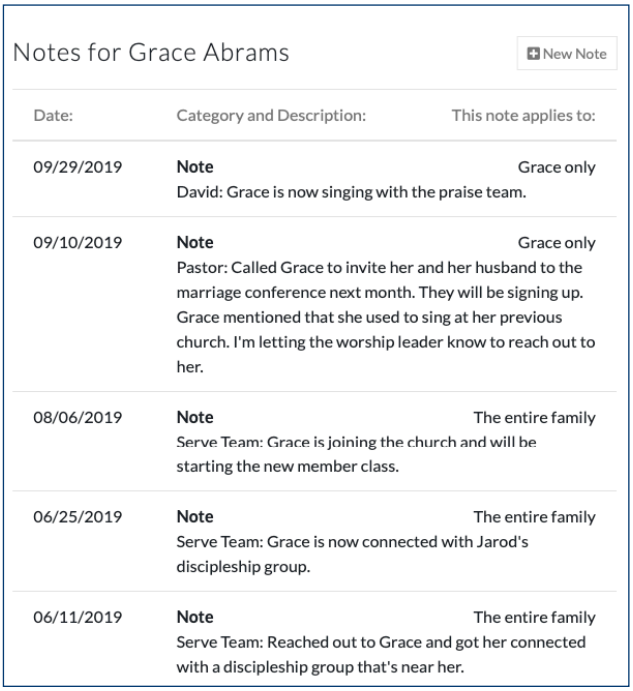
In a nutshell: Tags are a foundational feature of ChurchTrac and you will use them A LOT.

Notes

Notes enable you to go beyond having just basic information recorded about each person in your database. Notes are a great way to keep specific dated accounts for each person or family that can help you and other designated staff/volunteers minister to them.

Having detailed notes on each person makes it easier to identify not only how you can minister to them, but how your staff/volunteers can. Giving your team insight into your People enables them the either pick up where you left off or even record import notes for you to see as well. Notes serve as a timeline of communication between your people.

One important feature with Notes is that you can create different Note Categories and specify who can view them. For example, if you are counseling an individual, you can have counseling specific notes that can **ONLY** be viewed by a pastor.



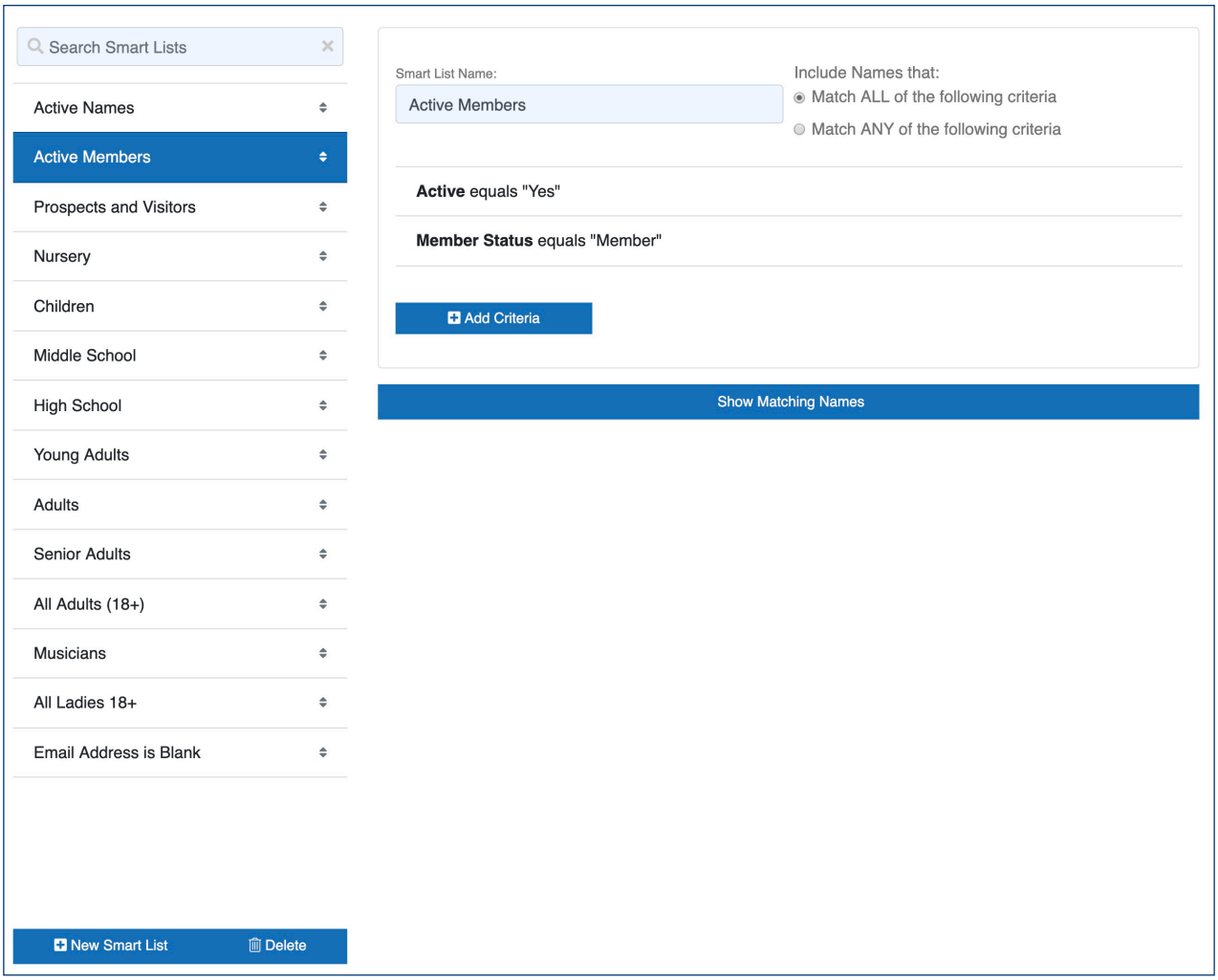
Smart Lists

Question #2: How do you delegate?

Getting the right people plugged into the right ministries is vital to the impact your ministry can make in your community. To help with that, ChurchTrac has Smart Lists. With Smart Lists, you can quickly see a list of names that meet a set of criteria. This criteria can be dependent on a Member Status, Age Category, Tag, Process Step & more!

For example, you might create a Smart List that will show you everyone who is an active member of your church that is background checked. As new names are added to your database that meets the Smart List's criteria, those names will automatically appear when viewing the Smart List.

Likewise, you could create a Smart List which includes all of your members who tagged as "SMS recipients" for sending out mass texts. You can make your Smart List as specific or as generic as you'd like it to be. In this example, we have a Smart List showing all Active Members:



Messaging

As a Pastor, you often communicate to your people from the pulpit. However, not everything can be communicated from there. There are times when you need to get a message out to either select groups of people or all of your people at once. Messaging lets you do that.

With Messaging, you can get a message out to your people in the form of an email, a text message, or even a voice message. This tool enables you to spend less time sending out multiple emails or having to write individual text messages to multiple people. You can send a messages to people with a specific Tag, People on a Smart List, or your entire church.

Did you know that over 85% of Americans text regularly? On top of that, 95% of SMS text messages are read within 3 minutes of being set! Sending SMS text messages is the #1 way to reach your congregation.

Takeaway

These are just some of the many great features included with your ChurchTrac Subscription. Like we mentioned at the beginning, your responsibilities as a Pastor will dictate which pieces of ChurchTrac you will use on a regular basis.

To learn more in depth about each of ChurchTrac's core features, go to our support page to see the ChurchTrac User Guide. Here you can learn about our other features including **Online Giving, Church Connect, Events, and more**. You can access the support page by clicking the green Help button within the software or going to www.churchtrac.com/support.