Vine ChMS User Guide

Everything the app can do, and how each workflow works: prayer requests, connect cards, care cards, CareFlow, benevolence, giving, service planning and more.

For every church on Vine ChMS

App version 2.36.61.2609 · November 2026

vinechms.com · Help: vinechms.com/vine-chms-support.html

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Getting Started

Vine ChMS is a church management system that runs in any web browser. Each church has its own private address (for example `yourchurch.vinechms.com`), its own logins and its own data. No church can see another church's information.

Signing in

1. Open your church's Vine address. Your administrator gives you a username and a temporary password.
2. Sign in. The first time, Vine asks you to choose your own password.
3. You land on the first page your role is allowed to see (usually the Dashboard).

After 10 wrong passwords for one username, or 30 from one location, in 15 minutes, sign-in pauses for a while. It clears itself. A lost password is reset by another administrator under **Settings → Staff Logins → Edit**.

> **TIP**
>
> On a phone or tablet, use your browser's **Add to Home Screen**. Vine then opens like an app. On an iPhone or iPad this is also required before notifications will work.

Finding your way around

The left-hand menu (the menu icon on a phone) lists every section you have access to. Anything you cannot see is hidden, not broken: your role and your login's individual permissions decide what appears.

Menu item	What it is for
Dashboard	Your personal home screen of widgets.
People	The directory: everyone your church knows, with households and private care sections.
Financial Planning → Giving, Accounting	Gifts, deposits, ledger, bills, payroll, benevolence, reports.
Service Planning → Song Library, Service Plans, Sermon Studio, Attendance	Songs, orders of service, volunteer scheduling, sermon resources, taking attendance.
Calendar	Church events, with their own volunteer roles.
Check-In	Children's check-in with printed labels.
Groups	Small groups and teams, membership, email and text.
Reports	Printable reports for the whole church.

Service Readiness, Facilities, Scenario Planner	Is the next service ready? What is in our buildings and what needs fixing? What if we add a service?
Forms and Policies	Public form links, QR codes, embed code, policy documents.
CareFlow	Connect cards, care cards and care plans: the follow-up and care engine.
Plan Your Visit	First-time guests who booked a visit, hosts and prep checklists.
Settings	Staff logins, branding, messaging, integrations, backup (admins).

> **GOOD TO KNOW**
> Most sections have their own small **Settings** tab (Calendar, People, Check-In, Service Plans, CareFlow, Accounting, Plan Your Visit). Those hold the options for that section only.

Vine remembers your place. The page and tab you are on are kept in the web address, so a browser refresh, or opening a copied link while signed in, returns you to the same screen.

The account menu (your picture)

Click your circular picture in the top-right corner.

Choice	What it does
My Profile	Your name, username, password, photo, Day/Night theme, and notifications for this device. See below.
View my People profile	Your own record in the directory, including My Story, My Care, Support, Prayer Requests and Benevolence. Shown only when an administrator has linked your login to your person record.
My Guest Follow-up assignments	The guests whose current follow-up step is assigned to you (same linked-person requirement).
My Tasks	A private to-do list that only you can see.
Help me find a group	Answer a few questions and get a ranked list of groups that fit.
Vine User Guide (PDF)	Opens this guide in a new browser window. It is its own item in the picture menu, just above Open a support ticket.
Open a support ticket…	Opens the Vine support site's ticket form.
Sign out	Ends your session.

My Profile

Open **picture → My Profile**. It shows your name, username and role, and these settings that belong only to you:

- **Theme:** a Day/Night switch. It applies instantly and only to your login. Cancel puts it back.
- **Notifications on this device:** a switch. Turn it on to receive browser notifications (for example CareFlow reminders sent to you) on *this* phone or computer. Your browser asks permission; a test notification is sent. Turn it off the same way. Each device is switched on separately. If your browser has blocked notifications for the site, the screen says so and you must allow them in the browser's site settings first. On an iPhone or iPad, add Vine to the Home Screen first. The switch is hidden when your church's server has not enabled notifications.
- **Two-factor sign-in:** an optional extra lock for your login. See *Two-factor sign-in* below.
- **Edit:** change your name, username, password (leave blank to keep it) and photo. Only an administrator can change a role.

Two-factor sign-in (optional)

Two-factor sign-in adds a 6-digit code from an authenticator app to your password. Even if someone learns your password, they cannot sign in without your phone. It is off by default and each person chooses for their own login. It applies to your church-app login only (the Account page and support site have their own passwords).

Turn it on

1. Install an authenticator app on your phone if you don't have one (Google Authenticator, Authy, 1Password, Microsoft Authenticator or similar).
2. Open **picture → My Profile**. Under **Two-factor sign-in** press **Set up…** and enter your password.
3. In the app, add an account by scanning the QR code on screen. If you can't scan, type the key shown under the code instead.
4. Type the 6-digit code the app now shows and press **Turn on**.
5. Vine shows **ten recovery codes** once. **Copy and keep them somewhere safe** (a password manager or a printed page). Each works one time if you lose your phone. Press **I've saved them**.

Signing in afterward

Enter your username and password as usual. Vine then asks for the 6-digit code from your authenticator app. If you lost your phone, type one of your recovery codes in the same box (it is used up). A wrong code counts as a failed sign-in attempt, like a wrong password, and repeated failures pause sign-in for a while. A code can't be used twice. My Profile shows how many recovery codes you have left.

Turn it off

In My Profile press **Turn off…**, then enter your password and a current code (or a recovery code).

Locked out? (lost phone and recovery codes)

Ask an administrator. In **Settings → Staff Logins** a login with two-factor on shows a **2FA** badge and a lock button; the admin presses it to turn two-factor off for you. You can then sign in with just your password and set it up again from My Profile. Administrators should confirm who is asking before they do this.

> **TIP**
> Administrators and anyone who can see finances, pastoral notes or benevolence information are the best people to turn this on first.

Roles and permissions at a glance

Role	Default access
Admin	Everything, including Reports, Forms and Policies, Settings, Payroll, Benevolence and the Audit Log. Not automatic: pastoral care notes, prayer requests and benevolence history on a profile (each needs its own switch).
Staff	People (edit), Song Library and Service Plans (edit), Calendar, Groups, Attendance, Check-In, Connect cards and CareFlow, Plan Your Visit, Service Readiness, Facilities, Sermon Studio, Scenario Planner.
Finance	People (view), Giving, Accounting, Scenario Planner.
Coordinator	Calendar, Groups, Check-In, Blackout Dates in Service Plans, Service Readiness, Facilities.
Volunteer	View-only Song Library and Service Plans, plus their own blackout dates when the login is linked to their person record.

An administrator can fine-tune any login under **Settings → Staff Logins → Edit**: each module can be set to **No access**, **View only** or **Full access**, and there are specialised switches (pastoral care, prayer requests, benevolence history, benevolence registry, designing workflows, editing locked books, deleting finalized batches). See *Settings and Administration*.

Getting help inside Vine

Explanations no longer sit as small print under page titles and fields. They live in the help panel, which is always one click away and always about what is in front of you.

- **Page help.** Click the circled **?** in the top bar, just left of the sync button. A panel slides in from the right and stays beside your work. It describes the page, the tab or side-menu item you are on, each control and report on it, and who can see what.
- **Window help.** Every pop-up window has a circled **?** in its header, just left of the **X**. It explains that window's fields and what saving does. If a window has no help of its own, you get the help for the page behind it.

- **More help in this area.** The bottom of the panel lists the other tabs of the same page, and a link back to the page overview.
- **Open the FAQ.** The **Open the FAQ for more detail** button opens the support site's knowledge base at the matching group of articles in a new tab. **Search the FAQ for…** runs a search for the topic, and **Open a support ticket** goes to the ticket form.
- **Closing it.** Press **Esc** or the X in the panel. It also closes when you move to another page, because it is specific to the page it was opened from; click **?** again on the new page.

> **GOOD TO KNOW**
> Warnings, errors, empty-list messages and notices you must read before an action (such as consent wording) stay on the screen. Everything else that explains how a feature works is in the help panel.

Things you will notice everywhere

- **The circled ? (help).** The circled **?** in the top bar explains the page and tab you are on; the **?** in a pop-up window's header, beside the X, explains that window. Small **?** icons beside a field or heading explain just that item. See *Getting help inside Vine* below.
- **Confirmation before deleting.** Deletes always ask first and say what will be lost. Where possible, **Archive** is offered instead because it can be undone.
- **Several people at once.** Vine merges edits to different records automatically. If you ever see a message that your last change was not saved, reconnect and repeat it.
- **The "Updated … ago" pill** at the bottom shows how fresh your data is; press **Refresh** to pull the latest.
- **Footer:** Privacy Policy, Terms of Service, Help (the support site), your Church ID and User ID (quote these to support).
- **Banners:** a trial banner counts down your trial; a billing banner appears if a payment is late; a demo banner appears in the 24-hour demo church.

Getting set up. In **Settings** → **General**, a **Getting set up** card lists the next few things your church has not done yet, chosen for your role: access for helpers, bringing in people, naming the five membership levels, who owns follow-up steps, funds and accounts, what “ready” means for Sunday, and what the Assistant can do without an AI service. Each step opens the screen where you do it, and **Dismiss** removes one you do not want to set up (kept for you on every device; use **Show dismissed steps** under the card and **Bring back** to restore it). Finishing the list sends nothing to anyone and never changes anyone's membership level.

Keyboard use. Every pop-up window can be closed with the Escape key, keeps the Tab key inside it while it is open, and returns you to where you were when it closes.

Dashboard

Your own at-a-glance home screen. Layout is saved per login, so changing it never affects anyone else.

Click **Customize** to enter edit mode. Add widgets, remove them, drag them into any order, and use a widget's gear icon for its options. Widgets only appear if your role or permissions allow the underlying data.

Widget	Shows
People, Groups, Households counts	Totals, with a raw change versus a week or a month ago (gear icon switches the window or turns it off).
Upcoming events / service plans counts; Coming up	What is next on the calendar (range from one week to one year).
Given this month; My Giving This Month	Church giving (Admin/Finance) and your own giving (if linked to a person record). The trend compares the same days of last month.
Attendance chart	Last 30 or 90 days, weekly, monthly, quarterly or annually.
Birthdays, Anniversaries, New people this month	Pastoral touch points.
Pending Connect Cards; Guest Follow-ups Needing Action	Cards awaiting review; the pipeline's health (needs the workflow-design permission).
My Assigned Connect Cards; My CareFlow Assignments	Your own queue of follow-up and care work.
Open Prayer Requests; Unassigned Prayer Requests	Counts for logins with prayer access. Unassigned means the request could not be matched to a person.
My Unanswered Prayers	Your own requests still open (if linked to a person record).
Open Benevolence Requests	Admins and logins with the benevolence permission.
Open Maintenance Issues; Blocked Spaces; Maintenance Due; Facilities needs attention	Facilities at a glance: open issues (with urgent count), rooms out of service or blocked by an issue, recurring maintenance due, and a short list of high-priority or blocking issues. Shown to the same logins that can open Facilities.
Checked In Today	Children currently checked in.
My To-Do List	A personal list with optional due date and time. Also reachable from the account menu as My Tasks.

Ready to move up: administrators who can edit service plans and people also see a notice at the top when an apprentice volunteer has served enough services to be considered for the next level. See Service Planning for how it works.

Vine Assistant

Ask a question about your ministry in plain English and get an answer from your own records, with a link to the right page and, where it makes sense, an action you can confirm.

Vine Assistant is near the top of the left menu (and the **Ask Vine** button in the corner of every page) for administrator, staff, finance and volunteer coordinator logins. Type a question and press Enter, or pick one of the suggested questions grouped by area. Suggestions and answers are limited to the pages your login can already open, so a coordinator sees volunteer questions and a finance login sees the books.

Area	Examples of what you can ask
Guests and care	Recent guests with no follow-up; connect cards not yet reviewed; Care Cards awaiting pastoral review; overdue CareFlow steps; how many people completed each follow-up step this year.
Service planning	Volunteers scheduled but not confirmed; unconfirmed volunteers on services whose room is blocked (needs both Service Plans and Facilities access); positions still unfilled; who is serving too heavily; willing volunteers who are rarely scheduled; who is ready to move up a skill level; who is at a given skill level (for example “who is at level 4?”); apprentice progress; expiring qualifications; scheduled volunteers without a cleared background check; double-booked people and rooms.
Songs	Songs missing a CCLI number, lyrics, a chord chart or a key; scheduled songs in the next few weeks that are missing any of those; songs not played in a long time. Requires access to the Song Library.
Finance	Deposit batches not finalized; missing or overdue compliance items; finance policy exceptions; bank accounts not reconciled; bills overdue or awaiting approval; missing receipts; audit red flags; giving this month; an AI summary of financial status (administrators).
Facilities	Open maintenance issues; scheduled maintenance due; a facilities report.
Attendance and people	Attendance trend; regular attenders who have stopped coming; new people; birthdays and anniversaries; people with no contact information.
Overview	**Weekly pastoral dashboard** (what needs attention in every area at once) and **Ways to improve ministry processes** (suggestions drawn from your own numbers).

Taking action

If your wording could mean two things, the Assistant shows the close questions and lets you pick instead of guessing. A question about a "level" asks whether you mean a skill level or a membership level; membership levels are only changed by a recorded decision in People.

Saved questions and the weekly brief. Save this question keeps the question and its settings (never the answer). Saved questions appear above the box and are asked again, fresh, each time on your own

permissions. **Share** offers one to colleagues once an administrator approves it. Ask for **this week's ministry brief** for the questions the Assistant can answer, grouped by area, with counts that match their pages; it names areas left out because you do not have access, and shows no names or private details. Every answer shows when it was built and from which records, warns if a record set did not load, and an action cannot be confirmed against an answer that has since gone out of date.

Answers show the rows behind them, and a **Based on** line names where they came from. **Go** and the page buttons take you to the screen where you can open, check or edit the item. Some answers also offer a button: **Finalize** a deposit batch that passes your finance policy checks, **Move up** a volunteer who has served enough services, **email** volunteers who have not confirmed, or **add a reminder** to your own tasks. Each button shows exactly what will happen and waits for you to confirm; emails open as a draft you can edit first. Everything is recorded in the Audit Log as done through Vine Assistant, and follows the same rules as doing it by hand.

Requests that change guest follow-up (for example *assign unassigned guests from the last two weeks and email them a welcome*) open a **proposal**. Each action is approved on its own and runs once only; editing or refreshing the proposal clears the approvals so you review again.

What it can and cannot see

The AI only reads your question and the names of the things it can show. It never receives your people, notes, giving or other records; the answer is worked out on your own screen from what your login can already open. Pastoral notes, counseling, prayer requests, benevolence, medical notes and individual donors' giving are not available to it however a question is worded, and giving answers are totals only. The AI financial summary uses the same totals as *Reports* > *Executive Summary*. The assistant cannot delete anything, change permissions or move money other than finalizing a batch you confirm. Birthday and anniversary questions use whatever period you ask for: *Who has birthdays in November?*, *anniversaries this month*, *birthdays between June and August*, *birthdays on March 3*. A month lists everyone in it with the age they turn. Questions about new people, guests, attendance, open positions, unconfirmed volunteers, conflicts, scheduled songs and expiring certifications take a period in the same way (*Who is new in September?*, *open positions in December*, *attendance since October 1*); with no period each keeps its usual window. Asking what an area is for, such as *What does Sermon Studio do?*, opens that area's help in a window you can close (the same text as the circled **?** on its page); nothing is looked up in your records. What you type is checked on your own screen first: a question that includes a person's name, a phone number, email, address, link, dollar amount or a private topic (health, family crisis, legal) is not sent to the AI at all, and the assistant says so; the suggested questions and People search still work. When you ask it to do guest follow-up work, names are replaced with placeholders before the request leaves Vine and put back in the plan you review. If the AI service is unavailable, clearly worded questions are still matched by keyword. It is not offered in the demo church.

People

The directory of everyone your church knows: members, guests, children, volunteers. Almost every other part of Vine points back to a person here.

Finding and adding people

- **Search** by name, household or tag. Click a name to open the profile.
- **AI Search** lets you type a question in plain English (for example *families who haven't attended in 30 days*). Vine turns it into removable filter chips so you can see exactly what it understood. It only reads; it never changes anything. Pastoral notes, benevolence and CareFlow data are never searchable. Searches can be saved under a name.
- **Add person** opens the form. **Households** manages families (two unrelated "Smith" families stay separate). **Qualifications** manages skills and clearances such as a nursery certificate.
- **Archive** someone who stopped attending: they disappear from everyday lists but keep their history. **Delete** is permanent and meant for mistakes.

A person's profile

Tabs appear according to your permissions:

Tab	Contents	Who sees it
Demographic Data	Contact details, household, status level, custom fields, volunteer preferences, giving history and statement, background-check status. The Edit, Archive, Remove and Background Check buttons appear only on this tab.	People access
Skills & Calling	The person's qualifications and levels, the groups they are interested in serving with, and everything they entered under My Skills & Calling, including what they keep private from leaders. Shown only to logins with **See the Skills & Calling tab on a person's profile** (Settings → Staff Logins → Specialized permissions, off by default for everyone including admins) and to the person themself. The person changes it under My Skills & Calling.	Skills & Calling tab permission, or the person themself
Relationships	Spouse, parent, child, sibling, in-laws and so on, drawn as a family tree from this person's point of view.	People access
CareFlow	Care plans for this person; the person can accept or decline offered care.	CareFlow access, or the person themself

Counseling	Pastoral care notes (date, time, location, text) and a button to submit a Care Card.	**Counseling access switch only**
Prayer Requests	Requests linked to this person; mark answered with an optional comment.	**Prayer access switch** or the person themself
Benevolence	A short history of help given.	**Benevolence-history switch** or the person themself
Support access	Who is allowed to see this person's support preferences.	People editors, on someone else's profile
Communication	Every email or text sent to this person, plus **Email** and **Text** buttons to message just them (Text appears when text messaging is set up; each is dimmed if there is no email or phone on file). Admins and staff only.	People access

PRIVACY

Being an Admin does **not** open pastoral care, prayer requests or benevolence history. Each is a separate per-login switch under Settings → Staff Logins, and the server enforces it, not just the screen.

Status levels, custom fields, import and cleanup

Under **People → Settings** (administrators):

- **Status options:** rename the five membership levels. The positions are fixed; a new guest starts at level 5 (default "Community"). **Update Status** is a manual check, never automatic. It previews who has no recorded attendance in more than 30 days (level 3 to 4) or more than 182 days (level 4 to 5), say why for each person, and mark people with no attendance on record at all. A visit exactly 30 or 182 days ago does not count as quiet. Untick anyone who should not move, then Apply; attendance is checked again at that moment, so anyone who attended since the preview is left alone. Levels 1 and 2 are never touched. If attendance has not been recorded lately, Vine warns you first.
- **Name display:** "First Last" or "Last, First".
- **Custom fields:** add your own fields, including file uploads.
- **Import / Export:** export every active person as CSV; import by pasting a CSV and dragging each column onto the Vine field it matches.

- **Duplicate people:** flags pairs sharing a name, phone or email. Review a pair to merge; all gifts, attendance, group membership, follow-up history, prayer requests and the linked login move to the record you keep. **Merging is permanent.** "Not a duplicate" dismisses a pair for good.
- **Unassigned prayer requests:** see *Prayer Requests*.
- **Background check expiry:** how long a completed Checkr check counts as current before reports flag it.

Support preferences (accessibility and practical help)

On your own profile, the **Support** tab lets you say, in your own words, what would help you take part: mobility and entrance access, seating, large-print or other formats, interpretation, quiet space, transportation, communication preferences, a designated support person. Nothing is visible until **you** choose to share it, with the leaders of a group, the organizer of an event, or one coordinator. You can set an end date and withdraw at any time. A parent or caregiver can manage preferences for dependents they are linked to.

Sharing creates a **request** for that team with a status that never over-promises: *Requested, not confirmed* → *Seen, not yet arranged* → *Arranged* or *Can't be provided* (or *Cancelled* if withdrawn or expired). Only **Arranged** means it is confirmed. Group and event pages show the team its requests.

How Requests Arrive: Public Forms

Guests and members can reach your church without a login through simple public pages. Each one feeds a staff workflow. This chapter is the map; the next chapters follow each workflow step by step.

Public page	Link ends with	Lands in	Who handles it
Connect Card	`?connect=1`	CareFlow → Connect and Care Card Submissions, then the Guest Follow-up board	CareFlow access
Prayer Request	`?prayer=1`	The person's Prayer Requests tab (or Unassigned, plus a Connect Card if nobody matched)	Logins with prayer access
Care Card	`?care=1`	CareFlow → Connect and Care Card Submissions (pending)	A care coordinator
Benevolence Request	`?benevolence=1`	Accounting → Benevolence (Requested)	Admins
Plan Your Visit	`?visit=1`	Plan Your Visit, plus a Connect Card	Staff; assigned hosts
Manage Your Visit	`?manage-visit=1`	Updates the same reservation	The guest, no login
Online Giving	`?donate=1`	Giving (pending), then an Online Deposit to confirm	Finance
Group signup	`?join=<group>`	The group's member list	Group leader / admins
Public Calendar	`?calendar=1&view=month`	(display only) Agenda, Week, Month or Year view	—

Sharing a form

Open **Forms and Policies**. The **Forms** table lists every public link for your church, including a signup link for each public group and the calendar in each view. Per row:

- the link itself (click to preview it),
- **Copy Embed Code**, an `<iframe>` snippet for your website (it uses `?embed=1` so the form resizes cleanly inside the page),
- **QR code**, to print on a bulletin, seat card or sign.

> **GOOD TO KNOW**
> The Benevolence Request link lives at the top of **Accounting → Benevolence**, because only admins handle those requests.

Changing what a form asks: the form builder

In **Forms and Policies**, the **pencil** beside Plan Your Visit, Connect Card, Prayer Request, Care Card or any form you made opens the form builder. Only an administrator, or a login with Full access to Forms, can change forms. The **clipboard** beside it lists the answers received. **New form** makes a form of your own, from a blank page or from a copy of another form, with its own link, QR code and embed code (`?form=name`).

Building

- **Add a question or block** opens a searchable list. The **+** on a question adds one right below it. In a question's text box, type **/** to change its type.
- **Question types:** short answer, long answer, number, rating, date, time, email, phone, web link, dropdown, multiple choice, checkboxes, a single checkbox, a toggle switch, and person (a name search that shows names only). **Layout blocks:** heading, text block, divider and page break (a long form becomes Next / Back pages).
- Drag the grip to reorder, or select a question and press **Alt + Up / Down**. Undo and redo are at the top. Each question's toolbar can move, duplicate or delete it.
- Click a question to set its help text, placeholder, **Required**, width (two half-width questions sit side by side), options (press Enter for the next option or paste a list; the round button beside an option gives it one of nine colours, shown on the option when someone fills the form and in the answers list), an **Other, please specify** choice that lets people type their own answer (kept as "Other: their text"), the lowest and highest number, the shortest and longest text, a starting answer, and the message shown when an answer is not accepted.
- **Show this only when** hides a question until an earlier answer matches (for example, "Which diet?" only when "Special diet" is checked). A hidden question is never required and its answer is never kept.
- **Preview** shows the form as a visitor sees it, at desktop or phone width. Nothing is sent. **Save form** makes the changes live.

The built-in forms

Questions marked **Built-in** feed the record Vine creates (names for a Connect Card, the request for a prayer request, the service and date for a visit). You can reword and reorder them, hide the optional ones and make optional ones required, but not delete them or change their type. **Reset to original** puts the first wording back. Questions you add are stored with the record and shown on it ("More answers from the form"), and in the form's answers list.

After someone submits

The side panel sets a thank-you message or an https page to send people to, up to five people to email when an answer arrives (the email says only that something arrived, never the answers), and when the form stops taking answers: closed by hand, closed automatically after a date, or after a number of answers. A form you made can also create a Connect Card, using the questions you mark as first name, last name, email, phone, address or comments.

Answers

The answers list can be searched and exported to CSV; an answer can be archived and restored. Prayer Request answers are visible only to logins on the prayer access list. Answers keep the version of the questions they were given, so changing a form never rewrites older answers.

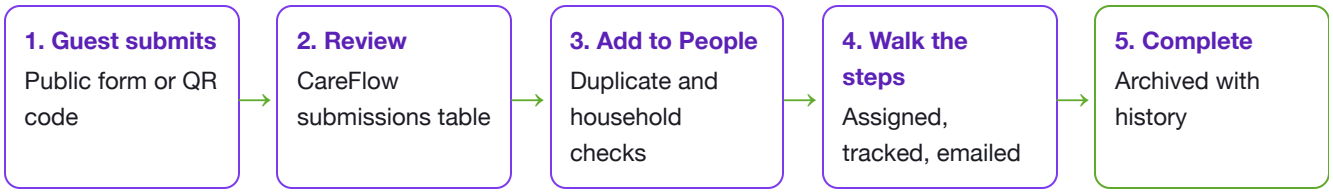
> **GOOD TO KNOW**
>
> Forms cannot take file uploads or signatures yet. Visitors can send up to 20 answers in ten minutes; a hidden box that only programs fill in quietly discards automated submissions.

What the public can and cannot do

- Public forms can only **add** a submission. They cannot delete or replace what is there.
- Benevolence requests use their own write-only door and can never be read back by the public.
- Plan Your Visit guests see only their own reservation, and only after entering the last name *and* the contact detail they originally gave.
- The public calendar shows only events not marked **Private**, and never shows volunteer names.

Connect Cards and Guest Follow-up

A Connect Card is the digital version of the card you hand a first-time guest. Submitting one starts a seven-step discipleship path with a named owner at every step, so nobody falls through the cracks.



1. The guest submits a card

The form asks for first and last name, phone, email, optional address, **what brings you here** (check all that apply) and comments. The choices are: First-time guest · I'd like to join the church · Prayer request · Update my contact info · Interested in a ministry/group · Salvation / recommitment · Baptism interest · Other.

Cards also arrive from three other places: a **Plan Your Visit** booking, a **prayer request** from someone Vine could not match to a person, and **Log a returning guest** on the Attendance screen.

2. Staff review the card

Open **CareFlow → Manage** and scroll to **Connect and Care Card Submissions**. The heading shows a count such as "3 new, 2 archived". Each Connect Card row offers:

Action	Effect
View	Full detail: submitted time, contact, reasons, comments.
Add to People	Creates a person at status level 5 with the card's details in their notes. If someone with the same name exists, Vine asks "same person?" and lets you link or create new. If one household shares the last name, Vine offers to add them to it.
Mark reviewed	Moves the badge from **New** to **Reviewed** and records who and when.
Archive / Unarchive	Hides the card from the active list. Reversible. Use **View archived** to see them.
Delete	Permanent. Also removes the guest's follow-up workflow and everything recorded on it.

3. The Guest Follow-up board

On **CareFlow → Manage** with **Guest Follow-up** selected, every active card appears as a guest on a kanban board. There is nothing to "start": a card existing is the trigger. The default steps are:

1. **Connect Card Submitted.** Assign someone to own the follow-up. The guest must be added to People before they can move on.
2. **Follow-up Call or Email.** An *Email guest* button sends a personal message.
3. **2-Week Follow-up Email.** The draft automatically includes the next 30 days of your calendar.
4. **New Converts Class.**
5. **Bible Study.** An attendance table tracks sessions.
6. **Baptism.** Checkboxes for *Baptized* and *Received the Holy Ghost*, which also update the guest's People profile.
7. **Volunteer.** Record areas of interest; this is saved to their profile as well.

Open a guest's card to assign someone (each step draws its people from a **Group**), write notes, fill in the step's fields, send email, and advance. Finishing the last step archives the workflow with its history.

- **Needs attention** panel at the top flags guests whose step has nobody assigned, or who have sat on one step for a week or more. Click one to jump to it.
- **Double-email guard.** If anyone emailed the same guest in the last 72 hours you see a warning naming who and when. It never blocks you, and every sent email is logged in the Audit Log.
- **Families.** Guests who share a household are shown as visibly connected, but each person's progress stays their own.
- **Reminders.** A stalled step (seven days with no progress) emails its assignee once. The assignee also sees the guest under **My Guest Follow-up assignments** in the account menu.

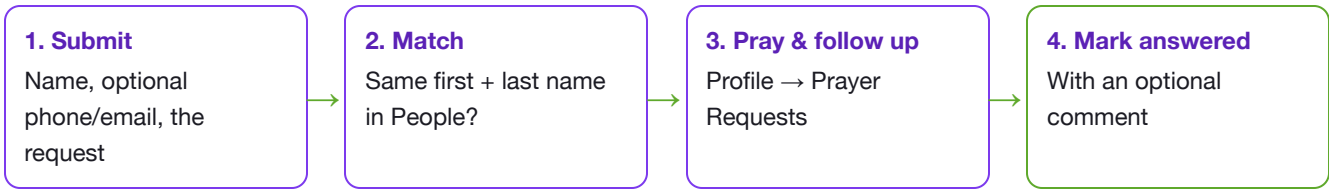
Designing your own steps

Admins, and logins with **Design Guest Follow-up Workflow**, see **Manage steps**. Reorder, rename, add or delete steps (step 1 is fixed). Each step can include form controls: checkbox, toggle, single-line text, radio buttons, multi-select, an attendance table or an email button. A control can optionally save its answer to the guest's People profile (baptized, received the Holy Ghost, volunteer interests, or one of your custom fields).

> **TIP**
>
> **Everyday rhythm for a team:** a coordinator reviews new cards Monday, adds people to the directory, assigns step 1; each assignee works their list from the account menu; the coordinator watches **Needs attention** and the Guest Follow-up reports (chapter on Reports).

Prayer Requests

Anyone can send a prayer request through a public page. The text is private to people your church has authorized, and a request is never lost: if Vine cannot tell who sent it, it waits in an Unassigned list and the person is also flagged for a personal follow-up.



1. Submitting

The form (`?prayer=1`) asks for first and last name, phone and email (both optional), the request and **who may read it**: *May be shared with the church*, *Prayer team only* (the default) or *Confidential*. The confirmation reads "Our team will be praying with you."

2. Automatic matching

- **Exactly one** person with that first and last name: the request is attached to their profile.
- **Nobody, or more than one** (two people sharing a name): Vine does *not* guess. The request is saved as **unassigned** for a person to resolve. This protects something as sensitive as a prayer request from landing on the wrong profile.
- **If nobody matched**, Vine also creates a **Connect Card** with the reason "Prayer request" so the person gets a personal follow-up through Guest Follow-up. The text of the request is *not* copied to the card; it stays with prayer-access users only.

3. Who can see and work prayer requests

> **PRIVACY**
>
> Prayer request access is its own switch, **Prayer request access**, on each login (**Settings → Staff Logins → Edit**). Role does not matter and Admins do not get it automatically. A person can always see their *own* requests on their own profile.

- **On a profile:** open the person, then **Prayer Requests**. Each request shows its time and a *Pending* or *Answered* badge.
- **Unassigned requests:** **People → Settings → Unassigned prayer requests** . Pick the right person to move the request onto their profile.
- **Dashboard widgets:** *Open Prayer Requests* and *Unassigned Prayer Requests* (counts), and for members *My Unanswered Prayers*.

- **Report:** `Reports → Prayer Requests Awaiting Follow-Up` lists requests older than a month and still unanswered, with the phone and email supplied.

4. Marking a request answered

Click **Mark answered**, optionally write how it was answered, and confirm. The request keeps its date, the answered date and your comment. Members who link their login to their own record see their requests on **View my People profile → Prayer Requests**; that screen opens on the Prayer tab automatically whenever something is still unanswered.

> **GOOD TO KNOW**
> The answered comment is a record for your care team, kept on the request.

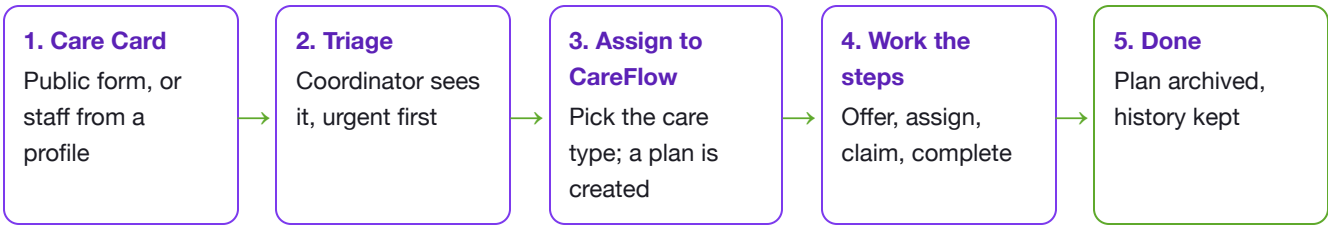
5. PrayerFlow, the prayer dashboard (prayer coordinators)

> **PRIVACY**
> The dashboard is `CareFlow → PrayerFlow`. Only members of the **prayer coordinators group** see it, and Admins do not see it unless they belong to that group. The person also needs CareFlow access. An Admin chooses the group under `CareFlow → Settings → PrayerFlow`, where they can also pick a **prayer team group** (who requests can be assigned to) and the number of days between follow-ups.

- **Tiles and filters:** Open, Needs follow-up, Unassigned, Answered in the last 30 days, and testimonies awaiting permission or cleared to share. Click a tile to filter the list.
- **Open a request** to change its privacy, assign it to a prayer team member, **Log follow-up** (records the date and schedules the next one), mark it answered, close it without an answer, or reopen it. A history lists every change.
- **Confidential requests:** coordinators see only initials, status and follow-up date. The text and notes are readable only by the assigned person and logins with pastoral care access. This lets a pastor see which requests need follow-up without seeing the details.
- **Updates from the person:** on **View my People profile → Prayer Requests** they can add an update or mark a request answered, with an optional testimony.
- **Testimonies:** a testimony is never shared until the person gives permission. Ask them, then record **They said yes** (with whether to use their name) or **They said no**; they can also answer on their own profile. Only a yes shows *Cleared to share*.

Care Cards and CareFlow

A Care Card says "someone needs care." A CareFlow is the care plan that answers it: a kanban workflow with steps, owners, due dates and helpers. Hospitalization, bereavement, a new baby, rides and meals all use the same engine.



1. Submitting a Care Card

- **Public:** `?care=1` asks *Who is this for?*, your name, optional email and phone, *What's the need?*, and **Urgency** (Normal or Urgent). The confirmation says a care coordinator will follow up.
- **Staff:** on a person's profile, in the **Counseling** tab (pastoral care access), choose **Care Card**. The recipient and submitter are filled in for you; you describe the need and urgency.

2. The coordinator's queue

All pending Care Cards sit in the same table as Connect Cards: **CareFlow → Manage → Connect and Care Card Submissions**. Urgent cards carry a red **Urgent** badge. For each pending card:

- **Assign to CareFlow:** choose a care type (for example Hospitalization) and press **Create**. This creates the plan, makes you its owner, and marks the card *assigned*. Nothing happens on its own until a coordinator makes this choice.
- **Dismiss (X):** closes a card that needs no plan.

3. Care types

Under **CareFlow → Settings → Care Types** (admins). Vine starts with **Guest Follow-up** (built in, cannot be deleted) plus **Hospitalization**, **Bereavement**, **New Baby** and **Transportation**. Each type has:

Setting	Meaning
Steps	The work to do. Design them with **Manage steps** (needs **Design CareFlow Plans**). Each step has a **form** built with the same form builder as the public forms (see Public Forms): short and long answers, number, rating, date, time, email, phone, web link, dropdown, multiple choice, checkboxes, yes/no, person, headings and dividers, plus the Attendance table and Email button. Questions can be required, carry help text, appear only when an earlier answer says so, and save straight to the person's profile.

Completion mode	**Sequential**: one step at a time, in order. **Parallel**: steps can happen in any order or together (a meal and a ride the same afternoon).
Helper claiming	Whether helpers can claim an open step themselves, not only be assigned.
Intake source	Connect Card (guests) or Care Card (care needs).

4. Working the board

On `CareFlow → Manage` pick a care type, then switch between **Board** and **Plans**. The board has columns by step status: **Open**, **Offered**, **In Progress**, **Completed** (latest 20). Plans is a list showing each plan's status and steps done. Click any card to open the full plan.

Action on a step	What it does
Offer to group	Anyone in that group can claim the step, first come first served. The server guarantees two people tapping Claim cannot both win.
Assign to person	Gives the step to one named person.
Claim	A group member takes an offered step. It becomes `In Progress`.
Mark complete	Choose an outcome and write a note. The outcome and note are written to the recipient's pastoral care notes as `CareFlow (auto-generated)`.
Release / Reopen	Return a step to Open so someone else can take it.
Due date	Optional date and time; overdue is shown automatically, never stored.

A plan has a status of draft, active, paused, completed or canceled. It finishes and is archived when every step is resolved: the last step done for sequential types, every step completed or canceled for parallel ones.

5. The person being cared for decides

When a step is offered or assigned for a person who has a login linked to their record, a gold **Awaiting recipient** badge shows on the card and the step appears in **View my People profile → My Care**, where they can **Accept** or **Decline** (or Accept all / Decline all). Declining cancels that step, removes it from every work queue and leaves a short note. Coordinators can still see everything; this is a courtesy and a record, not a lock.

6. Helpers and volunteers

- **Members → Opportunity Board → CareFlow needs** lists every open or offered step across all care types that is offered to a group you belong to. Only logins with CareFlow access see it, because each step names the person being cared for.
- **My CareFlow Assignments** (also a dashboard widget) lists steps that are yours.
- **Reminders:** each day Vine emails the owner of any step due today, tomorrow or overdue, and sends a browser notification to their devices that have notifications switched on (**My Profile**). Each step is reminded once per due date.

7. Playbooks: share a process between churches

PrayerFlow: **CareFlow → PrayerFlow** is a dashboard for the prayer coordinators group, and **CareFlow → Settings → PrayerFlow** (Admin) chooses that group. See the *Prayer Requests* chapter.

A playbook is a reusable ministry process: steps, forms, roles, relative deadlines, message templates and outcome measures. It contains no people, notes, messages or code, and installing one sends nothing and starts nothing. Under **CareFlow → Settings → Playbooks** :

- **Mentoring and classes:** a leader with People access can propose a mentor for someone from their *CareFlow* tab; nothing starts until both people agree, it runs for a set time with a review date, and either can end it. A mentor sees only the person's name and pathway progress. A group marked *This group is a class* takes enrollments, with an ordered waiting list when it is full; a leader records that someone finished, which opens one review task and never changes a membership level.
- **Backup for overdue steps:** in People → Settings, choose a backup group and the days (up to three, such as 3 and 7). A step still undone after those days is passed once per level to a member of that group, who sees it under *My CareFlow Assignments*; nothing is sent to the person being cared for.
- **Discipleship Pathway:** a sequential walk of six conversations (welcome, group, foundations, baptism, commitment, serving) that you can rename and reorder. A person's *CareFlow* tab shows how many steps are done, the next one and who owns it. Finishing every step never changes anyone's membership level; moving someone toward Core or Committed is a separate decision a leader records.
- Install a starter (*Hospital Visit Care*, *New Baby Meal Support*, *Bereavement Care*, *Discipleship Pathway*) or a file from another church. Preview, then map each playbook role to one of your own groups.
- **Update…** shows what changed and asks *Keep mine* or *Use the new version* where you both edited.
- **Export a care type** shows every piece of text that will be shared so you can remove anything personal first.
- Removing a playbook never deletes people or history; a type with history is deactivated.

8. CareForms: pastoral care letters and forms

CareFlow → CareForms writes letters and forms as PDFs and keeps a copy of each in Vine. Three come built in: the **Pastoral Care Informed Consent** form, the **Volunteer Acknowledgement Letter** and the **Pastoral Reference Form**.

1. Under **Create a form** choose a form type and click **Create**.
2. Fill in the **Details**. They are merged into the **Text of the form** below them, and the **Preview** on the right shows the PDF as it will be saved. Names are picked from the active people in **People**; the church name, address, phone, email and website come from **Settings → General**, and the pastor from the Senior Pastor chosen in **Accounting → Settings → Financial Policy**. On the volunteer letter, choosing the volunteer lists every service plan position and event role they were scheduled for: tick the ones that apply and the dates, times and positions are written into the letter.
3. Edit the text however you like. Until you edit it by hand it follows the details; after that the details leave your text alone, and **Rebuild from details** starts over from them.
4. Click **Finalize and download PDF**. The file downloads and is saved under **Saved forms**. Nothing is saved before this step, and closing the window discards your work.

Remember church details keeps the pastor's name, church phone and similar details so they are filled in next time. Under **Saved forms** you can search, download a PDF again, or use the copy button to start a new form from a saved one. Saved forms stay in Vine until an **Administrator** deletes them.

Your own form types. Click **New form type** (or **Copy as new type** on a built-in form) and write the wording. Put a name in double braces, like `{{Person's name}}`, wherever something changes each time; each becomes a box to fill in (`{{Start date|date}}` makes a date box, `{{Notes|long}}` a larger one). A line starting with `#` is a title, `##` a heading and `-` a bullet; `@line Label|value` adds a write-in line, `@sig Label|` a signature line and `@pagebreak` starts a new page.

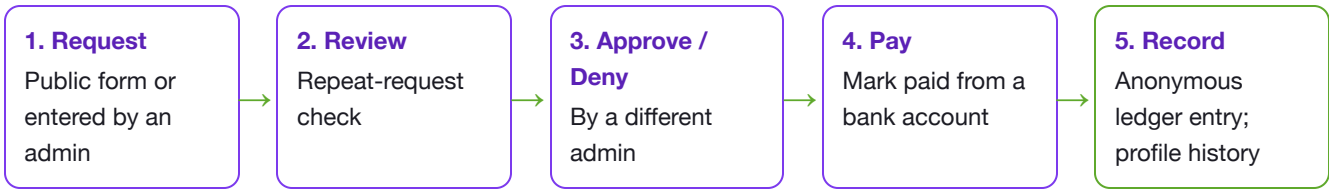
Access	What it allows
Hidden	CareForms does not appear.
View only	See and download saved forms.
Full access	Create forms, and add or change form types. Admins and Staff have this by default.

Set it per login in **Team → Staff Logins** on the **CareForms** row. Deleting a saved form is for Administrators only.

> **PRIVACY**
> Pastoral care notes are separate and stricter than CareFlow. Only logins with **Pastoral care / counseling access** see them, and Admins do not get that automatically. Guest and care plans never expose a note's text to people who only work a step.

Benevolence

Benevolence is financial help your church gives to people in need. It is the most sensitive information in Vine, so the tab is admin-only, the recipient's name never appears in the general ledger, and an administrator cannot approve their own entry.



1. Requests come in

- **Public form** (`?benevolence=1` ; copy the link at the top of **Accounting → Benevolence**): the person types their name (and may pick themselves from the directory), a phone number, the amount, and what it is for: Rent/Housing, Utilities, Food, Medical, Transportation or Other (a description is kept only for Other). It goes into a write-only door, so the public can never read any request back.
- **Entered by an admin: New request** on the Benevolence tab, choosing the person, date, category and amount.

Every new request is **Requested**. Requests from the public form are marked "(public form)".

2. Reviewing

- Filter by Requested, Approved, Paid, Denied or All; sort by date, person, category, amount or status.
- **Repeat Requests** panel: anyone with two or more requests in the last 90 days, whatever happened to them. Not necessarily a problem, but worth a look before approving another.
- **Aggregate summary (no names)** gives totals by category for board reporting.
- Open a request (pencil) to set the **expense category**, whether you **pay a vendor directly** (landlord, utility) or **the person**, the vendor, and **confidential notes** that never leave this screen.

3. Approving

Approve and **Deny** are available to an admin who did *not* create the request. If you created it, the row says "Needs another admin". Public-form requests have no creator, so any admin may approve them. Approval records who and when.

4. Paying

On an approved request press **Mark paid**, choose the bank (asset) account and the paid date. Vine posts one expense to the **Benevolence** fund with a generic description such as "Benevolence assistance,

Utilities", reduces that bank balance, and marks the request **Paid**. The person's name is never written to the ledger. Only unpaid requests can be deleted.

5. Afterward

- A short history appears on the person's profile in the **Benevolence** tab, visible to logins with *See benevolence history on a person's profile* and to the person themselves.
- The dashboard can show *Open Benevolence Requests* to admins and logins with that permission.

Working with other churches

Benevolence Registry

Opt in under **Accounting** → **Settings**. Only a name and a date are ever shared with other opted-in churches, never an amount, reason or contact. Needs the separate *Benevolence Registry Access* permission. On the Benevolence page, type a requester's first and last name under Cross-Church Benevolence Registry and choose *Check registry* to see which participating churches have already helped them, and when. Only churches that opted in are searched, only paid requests count, and every search is recorded in the audit log. The within-your-church repeat check works either way.

Cross-Church Referrals

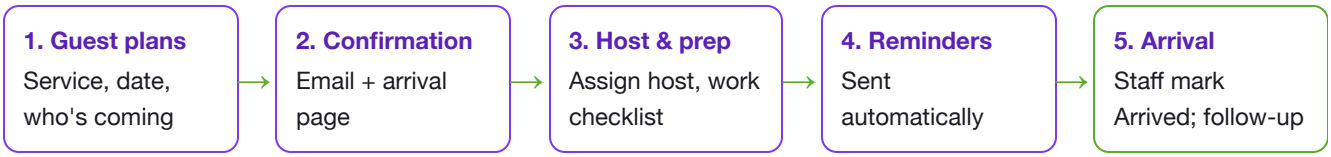
Publish the help your church offers (food pantry, housing help, rides) and refer a family to a partner church. You record the family's consent and tick only the fields they agree to share; exactly those fields reach the other church. They can revoke consent while a referral is still a draft. Admins opt the church in and grant individual logins under **Settings** → **Referral Network**.

CAREFUL

Because benevolence needs dual control, small churches with a single administrator should have a second admin login available (or another admin sign in) before approving requests that the first admin entered.

Plan Your Visit

A first-time guest plans their visit ahead of time, gets a friendly confirmation and arrival information, and is greeted by a host. No login is needed for the guest.



The guest's side

1. The guest opens `?visit=1` and enters their name, how to contact them (email or phone), the service and date, who is coming with them (with children's age ranges), any accessibility or practical support they would like, whether they want a host to meet them, and a consent box to be contacted.
2. They see a mobile-friendly **arrival page**: the service and date plus your parking, entrance and children's check-in instructions.
3. If they gave an email address they also receive a branded email, "Your visit to <church> is planned", with a **Manage your visit** button.
4. If they ticked the consent box and their device supports it, a **Remind me on this device** button offers a browser notification before the visit (iPhones need the page added to the Home Screen).
5. To change or cancel, the guest opens **Manage Your Visit** and re-enters the same last name and contact detail. There is no account and no link to lose.

> **GOOD TO KNOW**
> Every booking also creates a **Connect Card** with only non-sensitive summary details, so the guest joins the normal Guest Follow-up path. Household and accessibility details stay only in the visit record.

The staff side

Open **Plan Your Visit**. The table lists name, service, date, status, host and prep progress. Filter by status: **Planned, Confirmed, Arrived, Canceled, Did not attend**. Open a visit (**Details**) to:

- see who is joining them, whether they asked for a host, and their accessibility or support requests,
- work the **preparation checklist**: host assigned and notified · welcome message sent · children's check-in tags prepared · post-visit follow-up scheduled,
- set the **status**. Arrival is only ever recorded here by staff; a guest opening their arrival page never counts as attendance.

Assign a **host** from the dropdown. A person set up as a host (a login with view-level access to Plan Your Visit, linked to their person record) sees *only the visits assigned to them*, and a narrower version of each.

Settings and reminders

Plan Your Visit → Settings (admins):

- **Arrival information:** parking instructions, which entrance to use, children's check-in directions.
- **Reminders:** hours before the visit, comma-separated (for example `48,3`). Vine checks hourly and reminds only guests who consented to contact. A From address under **Settings → General → Messaging** is needed for email.

Giving and Accounting

Giving records what each person gave. Accounting is a full fund-based ledger with deposit batches, bills, reconciliation, payroll records and 501(c)(3) statements. Both are open to Admin and Finance roles (or any login granted them).

Giving

- **Log gift:** person, amount, date, fund (General, Missions, Building, Benevolence, Other, or your own), method (Cash, Check, Online). A gift that covers two funds is two entries.
- **Gifts join a deposit batch.** Logging a gift adds it to this week's open batch; nothing is "in the books" until that batch is finalized against the bank. Batches are grouped by calendar week automatically.
- **Pledges:** a committed amount to a fund with start date, optional end date and frequency. Vine compares pledged-to-date with actual giving.
- **Giving statements:** from a person's profile (any date range, PDF), or in bulk from **Accounting → Reports → Donors**.
- **Non-cash (in-kind) gifts** are recorded for the donor's receipt without a dollar value on their statement (the donor values it). **Quid pro quo** gifts record what the donor received so only the deductible part is stated, as IRS rules require over $75.

Online giving

With Stripe connected (**Settings → 3rd Party Integrations**), your public giving page (`?donate=1`) takes card and bank (ACH) gifts. A pending gift appears in Giving within seconds, matched to a person by email or created as a new "Crowd" person. When the money lands in your bank, confirm it under **Accounting → Online Deposits**: choose card or ACH, tick the deposits, confirm. Vine joins the gift to the open batch; finalizing posts the full gross as income and Stripe's fee as a separate expense, so the bank balance matches what Stripe paid out. Fee rates live in **Accounting → Settings**.

Deposit Batches (the fast way to enter an offering)

1. **Accounting → Deposit Batches → New**. Give it a description ("Sunday AM") and date.
2. Add one row per gift: person or anonymous cash, fund, method (Cash, Check, or Electronic), amount, and optionally a different deposit account for that row.
3. Watch the running total by fund and by account.
4. **Finalize.** This creates a real giving record for each named person, one ledger transaction per fund and account, and updates bank balances. A deposit-slip PDF is available.

Count sheet (optional). Under **Settings → Finance policy** you can add a count sheet to every batch: the people who counted each confirm the count, you enter the total (or each envelope's written amount

against what was inside), and the Treasurer can re-count and verify, never being one of the counters. A difference between counts needs a written note. You choose how many counters are needed, the difference allowed, whether the sheet is required before finalizing, how many years finalized batches are kept (they can't be deleted sooner), and how many days an undeposited batch waits before it is flagged. **Count sheet PDF** prints the record to file with the envelopes. Two cash rules can also be switched on: no vendors or checks payable to cash, and no petty cash account.

> **CAREFUL**
> A finalized batch is locked. Correct mistakes on the individual transaction or giving record afterward. Only logins with *Delete finalized deposit batches* can remove one.

Accounting at a glance

Tab	What it does
Reports	**Executive Summary** (one-page board overview); Statement of Activities, Functional Expenses, Financial Position and Cash Flows; Budget vs. Actual; Income and Expense Breakdown; Donors; Fund Balances; Giving by Fund; Giving by State; Pledges; Outstanding Payables; 1099 Vendor Summary. View or download PDF.
Transactions	The ledger: income or expense, account, fund, optional ministry, amount, check number. Restricted and board-designated funds warn before going negative. Gifts flow in via batches.
Chart of Accounts	Income, Expense, Asset and Liability accounts; annual budgets with change history; "copy prior year's budget"; masked bank account and routing numbers; starting balances; functional-expense percentages (Program, Management, Fundraising).
Funds	Unrestricted, Restricted and Board-designated funds; **Transfer between funds** (permanent, no fake income or expense); trends.
Ministries	Tag spending by ministry across any fund; ministry dashboards.
Online Deposits / Deposit Batches	As above.
Bills, Vendors	Vendors with W-9 and 1099 tracking (only whether you hold a W-9, never the number). Bills with approval, pay by check or transfer, and **recurring** series created automatically each morning. **Edit recurring bills** lists every active series. With **tiered approval** on, a **Policy check** shows any quotes, budget approvals or designated-fund rules still to meet before a bill can be paid.
Reimbursements, Cards	Optional pages, switched on under Settings. **Reimbursements** handles expense and travel reimbursements, cash advances and guest speaker honorariums. **Cards** tracks debit and credit cards, limits and purchase receipts.

Compliance	Optional. A checklist of deadlines (statements, filings, reconciliations, backups), annual audit records, the authorized signers list and a log of Board approvals.
Approvals	Bills and fund transfers waiting for an approver, and Board-approved exceptions to report at the next business meeting.
Check Register	Every check ever written; voiding returns money but keeps the number reserved.
Reconcile	Pick an account, enter the statement balance and date, check off transactions (or **Auto-match from bank**). Completion requires a difference of exactly zero and then locks those transactions.
Payroll Admin	Records what your payroll provider already ran (gross, housing allowance, net) and posts it as expenses. It does not calculate taxes or make pay stubs.
Benevolence Admin	See the Benevolence chapter.
Audit Log Admin	Who did what and when for sensitive actions, including emails sent from Guest Follow-up.
Fixed Assets	Property with purchase date, price and useful life; current value computed; mark disposed.
Settings	Bank connections (Plaid), fiscal year, Stripe fee rates, **Finance policy** limits, lock date, recurring-bill options, benevolence registry opt-in.

Executive Summary report

Accounting → Reports → Executive Summary is a one-stop overview for the board or finance committee. Choose **Calendar year** or **Quarterly** (and the year and quarter). It opens with a short AI-written paragraph that reads the numbers for you, then shows income, expenses, net and ending cash, the Statement of Cash Flows, Budget vs. Actual with a chart, monthly income and expense bars with income and expense tables by account, and pie charts of expenses by ministry and by expense account. **Download PDF** gives a printable copy.

- The paragraph is generated from the totals only (never individual gifts or people). Read it against the figures, and use **Regenerate** for a fresh version. If the AI service is unavailable you get a plain automatic summary instead.
- Budgets are annual: a quarter is compared to a quarter of each budget, and a period that isn't over yet is compared only to the part of the budget that has elapsed.
- The ministry pie is only as complete as the ministries chosen on transactions; spending without one appears as "No ministry assigned".

Protecting your books

- **Reconciliation lock:** transactions in a completed reconciliation need an admin override to change.

- **Lock date:** freeze everything dated on or before a chosen date (for example after year-end). Changes then need the override permission and an extra confirmation.
- **Dual approval:** bills and benevolence requests cannot be approved by the person who entered them.

Putting your finance policy to work

Accounting → Settings → Finance policy turns your church's written limits into controls. Every dollar amount, count and number of days is a setting you can change, each group of controls has its own switch, and all of them start off.

- **Who approves:** name the Senior Pastor, the Board President and the Church Board members. Where a role is left blank, an administrator stands in for it.
- **Bills by tier:** the ministry's team leader approves ordinary bills, the Senior Pastor approves repeating bills (once for the whole series), and the Church Board approves single expenses at or above your Board amount, recording the meeting date. Nobody approves a bill they entered.
- **Quotes:** purchases at or above your quote amount need the set number of quotes recorded, or a written reason.
- **Budget limits:** spending over a budget line up to your limit needs the Church Board's approval; beyond it the church must first approve a budget amendment. Unbudgeted emergency expenses need Board approval up to your emergency limit, a note saying why they could not wait, and funds available.
- **Fund transfers:** the Board President approves up to your limit and the Church Board above it; no money moves until approved.
- **Designated funds:** can't be overdrawn or spent on categories the fund doesn't allow, and a fund with a balance that sits unused (or passes its expected completion date) is flagged.
- **Reimbursements and advances:** expense requests go to the ministry team leader, travel and honorariums to the Senior Pastor or a designee, and large ones to the Church Board. Travel uses your mileage rate and can require an approval dated before the trip; a cash advance must be accounted for within your set number of days, and the receipt rule can hold payment until the original is on file.
- **Cards:** each card has a holder, a monthly limit and a signed agreement date. Purchases are flagged when a receipt is late, and can be blocked past the limit or without an agreement.
- **Designated funds and gifts:** require a purpose, responsible team, completion date and leftover plan; require the Treasurer's approval before gifts go to a fund; refuse gifts to restricted funds; and record fundraiser and event purchases as general gifts.
- **Reserves:** **Reports → Reserves** shows how many months of operating costs your chosen reserve accounts hold against your target range, and can suggest a share of net income to set aside.
- **Compliance checklist:** your own list of deadlines with dates you choose; reconciliation and backup items tick themselves off, and the menu shows how many are due or overdue.

- **Annual audit:** records the auditor and refuses anyone who works on the accounts; sign-off is recorded. Each audit has a checklist of questions (Yes, No or Not applicable, with notes) that you can reword, add to or remove, and shows what your books say about old unreconciled checks, unused check numbers and late bills. Settings can require every question answered, and every No explained, before sign-off.
- **Insurance, loans and safe deposit boxes:** a schedule of each, with reminders before a policy expires and when a loan balance or box has not been confirmed or checked within your set time. Each of the three has a Documents table: upload a file with a title and short description (the upload date is recorded), then use the file link or the download icon to save it, or the pencil to edit, replace or delete it. Only logins with Accounting access can open the files. The signers list also records when it was last verified.
- **Authorized signers:** who is approved for bank access, and optionally only they can record payments.
- **Board approvals:** borrowing, property and contract decisions, with a flag when notice was shorter than your setting.
- **Reports:** **Fund Activity Statement** (income and expenses by fund) and **Policy Exceptions** (where practice drifted from policy in a month).

Board-approved exceptions are collected under **Accounting → Approvals** so they can be reported to the church at its next business meeting.

> **GOOD TO KNOW**
> Every transaction is posted only when cash actually moves, so a bill has no effect until it is marked paid. That is why "change in net assets" equals net cash from operations in the cash-flow statement.

Review reports. Under **Accounting → Reports** are six read-only checks: **What Needs Attention First** (your own finance policy checks, most serious first), **Cash Forecast** (the next weeks, with a range and the assumption shown), **Budget Variance** (a month, quarter or fiscal year, with each budget counted only for the days that have passed), **Receipts Still Missing**, **Year-End Close Check** and **Giving Statement Check** (totals, missing emails or addresses, and non-cash gifts kept apart). None of them posts, locks or sends anything.

Approvals, payouts, packets, evidence and schedules. Five more screens sit under **Accounting → Reports**. **Approval Requests** lists unpaid bills waiting for you and lets you ask one person (or two, for the board tier) to approve; your own requests never appear in your list, and a request that no longer matches the bill's amount, payee, fund, account or schedule must be asked again. **Stripe Payouts** ties online deposits to the payout that carried them and shows whether gifts minus fees equal what reached the bank. **Board Packets** saves a period with the exact version of the books it came from and a fingerprint of its figures (donor names left out); *Rebuild and compare* tells you if the books have changed since. **Audit Evidence Access** shares named documents with a person who has a login, for 1 to 60 days; *Stop sharing* ends it at once, and every download is written to the audit log. **Report Schedules** (today: Budget variance) makes the report on the server for the last finished week, month or quarter, keeps it exactly as made, and emails a link to it (never the figures). The link opens it under *Scheduled Report Results* only

while you still have access to the books, are on the list, and it has not expired (30 days); a schedule stops by itself if its owner loses access. Changing a recurring bill's amount, vendor, fund, account or frequency pauses new bills until a different person selects *Approve the change* in *Recurring bills*.

Walkthrough: Setting Up Your Church's Books

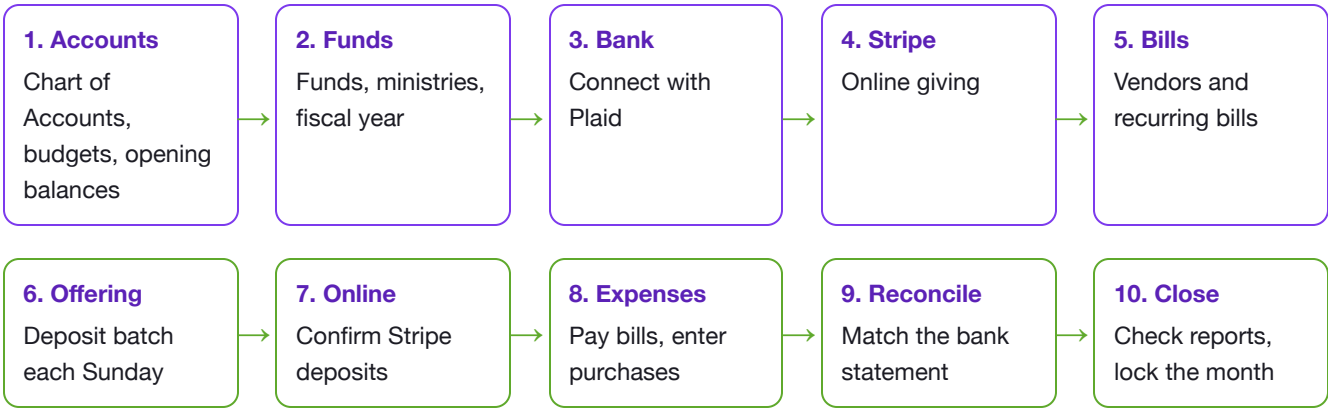
One church, start to finish. This chapter sets up the books for a made-up church the way you would for yours: the Chart of Accounts, the Stripe and bank connections, recurring bills, then a first month of real work (offerings, online gifts, expenses) ending in a reconciliation. Every screen name and button is the real one. The names, amounts and dates are invented, so swap in your own as you go.

OUR EXAMPLE CHURCH

Cedar Hollow Fellowship is a church of about 90 people with a pastor, a part-time secretary and a mortgage. **Linda Foster** is the volunteer treasurer and has the Admin role. **Pastor Marcus Reed** is also an Admin, so he can approve what Linda enters. Their books begin on January 1 and run on the calendar year. Their bank is First Valley Credit Union, with a checking account and a savings account. Their opening balances on December 31 were **$24,310.42** in checking and **$9,500.00** in savings. The first Sunday of the new year is January 3.

The order of the work

Each step uses the one before it, so follow the order the first time. Steps 1 to 5 are done once. Steps 6 to 9 become your weekly and monthly routine.



Before you start

- **A login with Admin or Finance access** (or any login granted Accounting; the menu is hidden from everyone else). A second Admin or Finance login makes approving bills a real second pair of eyes.
- **Your last bank statement** for each account: you need the closing balance as of the day before your books begin.
- **A list of what you pay regularly** (mortgage, utilities, insurance, internet), with amounts and due dates, and your budget for the year if you have one.

- **Your Stripe login** if you want online giving, and your online-banking login for the bank connection.

Open **Accounting** from the main menu. The first time it opens, Vine fills in a starter chart of accounts, five funds and seven ministries so nothing is empty. The starter pieces are there to be changed.

Step 1. Build the Chart of Accounts

The Chart of Accounts is your list of categories: where money comes from (**Income**), where it goes (**Expense**), what you own (**Asset**, which includes each real bank account) and what you owe (**Liability**). Every dollar in Vine carries one account, one fund and, optionally, one ministry.

The starter chart has two income accounts (Fundraising & Events Income, Interest & Other Income), five expense accounts (Ministry & Missions, Pastoral & Staff, Facilities & Utilities, Office & Administration, Fundraising & Events), two asset accounts (Checking Account, Savings Account) and one liability (Accounts Payable). Notice there is no account for the offering. Linda adds that first.

1. Go to **Accounting → Chart of Accounts** and press **Add account**.
2. Enter the **Account name** and **Account type**. For an expense, choose the **Functional category** (Program, Management & General or Fundraising). Enter the **Annual budget** for income and expense accounts. Press **Save**.
3. Repeat for each account. To change a starter account, open it with its pencil icon, edit and save.

Here is the chart Linda ends up with. Rows marked *new* were added; the rest are starter accounts she edited.

Type	Account	Functional category	Budget
Income	Tithes & Offerings **new**		$160,000
Income	Facility Rental Income **new**		$4,800
Income	Fundraising & Events Income		$5,000
Income	Interest & Other Income		$200
Expense	Pastoral & Staff	Program	$72,000
Expense	Church Secretary Wages **new**	40% Program, 60% Management & General	$24,000
Expense	Mortgage **new**	Management & General	$31,200
Expense	Facilities & Utilities	Management & General	$9,600
Expense	Insurance **new**	Management & General	$4,800
Expense	Office & Administration	Management & General	$6,000
Expense	Ministry & Missions	Program	$18,000

Expense	Fundraising & Events	Fundraising	$3,000
Expense	Banking & Processing Fees new	Management & General	$1,200
Asset	Cedar Hollow Checking (was Checking Account)		
Asset	Cedar Hollow Savings (was Savings Account)		
Liability	Accounts Payable		

Budgets total $170,000 of income against $169,800 of expense, so Cedar Hollow plans to end the year about even.

Splitting one account across categories

The secretary's wages are shared: some of the work is ministry and some is running the office. On **Church Secretary Wages**, Linda sets **Management & General** to 60. **Program** fills in the other 40 on its own so the three always add to 100. The Functional Expenses report then divides the account that way.

Opening balances and the first check number

Open the checking account. Vine keeps a bank account's balance as the sum of what has been entered, so the money already in it must be put in once.

1. Rename it **Cedar Hollow Checking**.
2. Type **24310.42** in **Starting balance**, then press **Apply to current balance** once. The amount moves into **Current balance** and the starting field resets to 0 so it cannot be added twice.
3. Type **1048** in **Starting check number** (the next number in the checkbook). Account and routing numbers are optional; if you add them they are shown masked.
4. Press **Save**. Do the same for savings with a starting balance of 9500.00.

> **CAREFUL**
> Apply the starting balance only once, and only for money that was in the account before your first entry in Vine. Do not use it to correct a mistake later; enter a transaction instead.

Step 2. Funds, ministries and the fiscal year

An **account** says what kind of money it is. A **fund** says what it is for. The starter funds suit most churches: **General** (unrestricted), and **Missions**, **Building** and **Benevolence** (restricted), plus **Other**. Cedar Hollow keeps them as they are and only adds a description to Building ("Roof replacement"). Edit a fund from **Accounting → Funds**.

- Cedar Hollow keeps the starter **ministries** (Children's Ministry, Music & Worship, Facilities and the others) under **Accounting → Ministries**. A ministry is an optional extra label that lets a report show what each ministry spent, whatever fund or account paid for it.
- **Accounting → Settings → Fiscal year** is already January to December, which is what Cedar Hollow uses. Change the start and end months only if your year differs, such as July to June.

> **GOOD TO KNOW**
> Fund balances are built from the entries you make, not from a bank account's starting balance. So Cedar Hollow's $24,310.42 opening cash does not belong to any fund, and the General fund starts at $0.00 on the first day. Until some income is entered, Vine warns when you spend from a restricted fund (it warns, it does not block). The bank balance and the total of all fund balances therefore differ by the opening balance, and that is expected.

Step 3. Connect the bank accounts (Plaid)

A bank connection lets Vine download real transactions so you can turn bank lines into entries and, later, match them during reconciliation. It is optional. Everything works by hand without it, but it saves typing and catches mistakes. Vine uses Plaid, a bank-connection service. Your bank sign-in happens in Plaid's own window, and each of your bank accounts is connected separately.

1. Go to **Accounting → Settings**. The **Bank Connections** card lists every Asset account with a **Connect** button. (The bank icon on an account in the Chart of Accounts opens the same screen.)
2. Next to **Cedar Hollow Checking**, press **Connect**, then **Connect bank account**. Plaid's window opens. Choose First Valley Credit Union and sign in.
3. If the login covers more than one account, Vine asks **Which account is Cedar Hollow Checking?** Pick the checking account. Only the one you pick is ever synced; a personal account that happened to be on the same login is never read.
4. The screen now shows **Connected to First Valley Credit Union**. Press **Sync transactions** to download the latest lines. Each line has an **Add as transaction** button that pre-fills the date, amount and description. Set the category and fund, then save.
5. Repeat for **Cedar Hollow Savings**.

> **TIP**
> If the card says bank connections are not available yet, contact Vine support; the connection is switched on for the platform, not by each church. If you later change banks, use **Change account** to relink or **Disconnect** to remove the link.

Step 4. Connect Stripe for online giving

With Stripe connected, the giving page (`?donate=1` on your church's address) takes card and bank (ACH) gifts. Vine needs three things from you: a Stripe secret key, a webhook signing secret, and three

choices of account.

In Stripe

1. Sign in to your own Stripe Dashboard. Search for **API keys** and choose **Create a Secret Key**. Pick **Building your own integration** and **Full access except sensitive operations**. Name it, for example *cedarhollow_tithes*, and finish. Stripe emails you to verify your identity. Then copy the key (it starts with `sk_`).
2. In another tab of the Dashboard, search for **Webhooks**, choose **Add destination**, then **Your account**, then **Snapshot**, and add the event **checkout.session.completed**. For the endpoint, paste the **Webhook URL** from your Vine card (you copy it in the first step of the next list, so keep both tabs open). Stripe then shows a signing secret that starts with `whsec_`. Copy it.

In Vine

1. Go to **Settings → 3rd Party Integrations** and find the **Online Giving (Stripe)** card. Open **Webhook and donation link** to copy the **Webhook URL** (for Stripe, above) and the **Donation page link** (for your website and emails).
2. Paste the key into **Secret key** and the signing secret into **Webhook signing secret**.
3. Choose the three accounts. Cedar Hollow picks **Cedar Hollow Checking** for **Default deposit account**, **Tithes & Offerings** for **Deposit income category**, and **Banking & Processing Fees** for **Processing fee expense category**.
4. Press **Save**. The two badges at the top change to **Secret key: Configured** and **Webhook: Configured**.

> **CAREFUL**
> The secret key and signing secret are stored securely on the server and are never shown again. Do not email them or paste them in chat. To replace one, enter a new value; to remove everything, use **Clear Stripe configuration**.

Check the fee rates

Vine works out each online gift's processing fee so your books match what Stripe actually pays out. Open **Accounting → Settings → Stripe processing fees**. The defaults are 2.9% + $0.30 for cards and 0.8% + $0.00 for bank transfers (ACH). If your Stripe agreement has different rates, enter them here. Cedar Hollow keeps the defaults.

To test the whole path, give a small gift yourself through the donation link. It should appear in Giving within seconds as pending. Step 7 confirms it.

Step 5. Vendors and recurring bills

A bill is money you owe. Nothing is posted to your books for a bill until it is paid, so entering bills early is safe. A **recurring** bill is entered once and then repeats on its own.

Add the vendors

Go to **Accounting → Vendors**, press **Add vendor**, and enter the name, contact details and whether you hold a W-9. Vine records only that the form is on file, never the SSN or EIN. Cedar Hollow adds:

- First Valley Mortgage (the lender)
- Pine Valley Power & Gas
- Clearwater Internet
- Shield Church Insurance
- Hartley Office Supply (used in Step 8)

Set the approval threshold

On **Accounting → Bills** (Admin view) there is a line that reads "Require a second person's approval for bills of ... or more". Press **Change**, enter **1000** and save. From now on any bill of $1,000 or more waits for someone other than the person who entered it. (If you switch on tiered approval under Finance policy, that takes over; see "Putting your finance policy to work" in the Giving and Accounting chapter.)

Enter the recurring bills

Press **Add bill**. Choose the vendor and expense category, set the dates and amount, choose a fund and optional ministry, tick **Recurring** and pick a **Frequency** (Daily, Weekly, Bi-Weekly, Monthly, Bi-Monthly, Quarterly, Semi-Annual or Annual). Save. Cedar Hollow enters four:

Vendor	Expense category	Amount	Due	Frequency	Ministry
First Valley Mortgage	Mortgage	$2,600.00	Jan 1	Monthly	Facilities
Pine Valley Power & Gas	Facilities & Utilities	$412.18	Jan 15	Monthly	Facilities
Clearwater Internet	Office & Administration	$129.00	Jan 20	Monthly	Administration
Shield Church Insurance	Insurance	$4,800.00	Mar 15	Annual	Administration

All four use the **General** fund. Because the mortgage is over the $1,000 threshold, it shows as waiting for approval. Pastor Reed signs in, opens Bills and presses **Approve** on it. The insurance bill is also over the threshold and will wait for him in March.

How a series behaves

- The next bill appears on its due date. Once the mortgage bill due January 1 exists, Vine creates the February 1 bill on February 1 (every morning it checks, even if nobody has signed in), whether or not January's was paid. Each new bill is a copy of the newest bill in the series.

- A utility bill changes every month. When the new bill appears, open it and change the amount to match the real statement before you pay it.
- **Edit recurring bills** (above the list) shows every active series with its next due date. To stop a series, open its newest bill and untick **Recurring**. Past bills are not affected.
- **Accounting → Settings → Recurring bills schedule** shows when the automatic job last ran.

Step 6. Record the offering plate

On Sunday, two people who are not related to each other count the offering together, fill in the count, and sign it. The envelopes and checks go to the bank. In Vine you record the same thing as a **deposit batch**: one batch per deposit, one row per gift. Finalizing the batch is what turns it into giving records and ledger entries.

On Sunday, January 3, Cedar Hollow's offering has five gifts, entered as six rows: two checks (one of them split between General and Missions), two named cash envelopes (one marked for the building fund) and loose cash from the plate.

1. Go to **Accounting → Deposit Batches** and press **New Deposit Batch**.
2. Set **Date** to Jan 3 and **Description** to "Sunday AM, Jan 3". Set **Default deposit account** to **Cedar Hollow Checking** and **Income category** to **Tithes & Offerings**.
3. Press **Add item** for each gift. Choose the giver under **Given by** (or leave "Not a specific person" and type a description such as "Anonymous cash"), the amount, the **Fund**, and the **Method** (Cash, Check or Electronic). For a check, add the check number. A gift on one check that covers two funds is two rows.
4. Check the running totals at the bottom against your count sheet. They are listed by fund.
5. Press **Save (keep open)** if you are not finished or have not made the deposit yet.
6. When the money is at the bank and the totals agree, press **Finalize batch**.

Given by	Method	Fund	Amount
Robert Chambers	Check #4417	General	$250.00
Maria Ortiz	Check #1182	General	$120.00
Maria Ortiz	Check #1182	Missions	$50.00
James Whitaker	Cash	General	$200.00
Anonymous cash (plate)	Cash	General	$412.00
Priya Nair	Cash	Building	$100.00
Batch total (General $982.00, Missions $50.00, Building $100.00)			**$1,132.00**

Finalizing creates a giving record for each named person (visible on their statement), one income entry for each fund in **Tithes & Offerings**, and raises the checking balance by $1,132.00. Press the bank icon on the batch row for a **deposit slip PDF** to take to the bank.

> **CAREFUL**
> A finalized batch is locked. If you notice a mistake afterward, correct it on the individual giving record or ledger entry. Finalize only after the count matches, because that is easier than fixing it afterward.

> **TIP**
> Givers must be in People to get credit on their statement. If a regular giver is missing, add them to People first, then choose them in the batch. Cash with no name goes in as a description such as "Anonymous cash" and has no giving record.

Cedar Hollow repeats this each Sunday: the offering on January 10 is $1,245.00, on the 17th $1,018.50, on the 24th $1,306.75 and on the 31st $1,150.25. For a formal count, turn on the **count sheet** under **Settings → Finance policy** (see the Giving and Accounting chapter); it records who counted, what they counted, and the Treasurer's re-count.

Step 7. Add deposits that came in through Stripe

Online gifts do not need typing. During the week of January 4 three members gave through the donation page: Mark Delgado $75.00 by card (General), Tomas Rivera $25.00 by card (Missions) and Hannah Brooks $150.00 by bank transfer (General). Each one appeared in **Giving** as **pending** within seconds, matched to a person by email, so the donor's statement is already right. What is left is to tell Vine the money has actually reached the bank.

Stripe pays out in lumps, after its fees, and not on the same day. Wait until the payout shows in your bank, then confirm.

1. On January 8 the card payout lands in checking: **$96.51**. That is $100.00 of gifts less $3.49 in fees ($2.47 on the $75.00 gift and $1.02 on the $25.00 gift).
2. Go to **Accounting → Online Deposits**. Under **Pending confirmation**, set **Payment type** to **Card**, tick Delgado and Rivera, and press **Confirm**. Vine shows "Confirmed 2 deposits" and the fees it calculated.
3. On January 12 the bank-transfer payout lands: **$148.80** ($150.00 less $1.20). Set **Payment type** to **Bank transfer (ACH)**, tick Brooks, and press **Confirm**. Card and bank-transfer gifts are confirmed separately because Stripe pays them out separately.
4. Open **Deposit Batches**. Confirming added all three gifts to the open batch for the week (named "Week of Jan 4"), at their full gross amounts. Check that its deposit account and income category were pre-filled from the Stripe settings, then press **Finalize batch**.

Finalizing posts the **gross** amount ($250.00) as income, split by fund (General $225.00, Missions $25.00), and the **fees** ($4.69) as a separate expense in **Banking & Processing Fees**. The checking balance goes up by the net $245.31, which is exactly the two payouts ($96.51 + $148.80). Donors' statements show what they gave, not what was left after the fee. Gifts never get a second giving record when the batch is finalized, because they were recorded when they arrived.

> **GOOD TO KNOW**
> Give the deposit a quick look before you confirm. If a pending gift is a mistake or a duplicate and you do not see it in the bank, reject it with the X on its row rather than confirming it.

Step 8. Record expenses

There are two ways money goes out. Use a **bill** when you owe a vendor and want to track what is due. Use a **transaction** when the money has already moved: a debit-card purchase, a check you wrote on the spot, a bank fee.

Pay a bill

1. Open **Accounting → Bills**. The list shows what is unpaid and how much.
2. On January 4, with Pastor Reed's approval in place, Linda presses **Mark paid** on the mortgage bill. **Pay from** is Cedar Hollow Checking, **Method** is ACH, **Payment date** is Jan 4. Press **Record payment**. The $2,600.00 posts as an expense in Mortgage, from the General fund, and the checking balance drops.
3. On January 15 she pays the power bill ($412.18) by **Check**. Vine fills in the next check number, **1049** (the number after the Hartley check below). It is recorded in the **Check Register**.
4. On January 20 she pays Clearwater Internet ($129.00) by ACH.

> **GOOD TO KNOW**
> Vine will warn you if a payment would take the account negative. A check you void keeps its number reserved, so numbers are never reused.

Enter a purchase that is already paid

Go to **Accounting → Transactions** and press **Add transaction**. Choose **Type** (Expense), the **Expense account**, the **Asset account (where the money moves)**, the **Date**, **Amount**, **Fund**, an optional **Ministry** and a **Description**. Cedar Hollow's two purchases this month:

Date	What	Account	From	Ministry	Amount
Jan 6	Sunday school curriculum (debit card)	Ministry & Missions	Cedar Hollow Checking	Children's Ministry	$212.35

Jan 8	Hartley Office Supply, printer paper and toner (check)	Office & Administration	Cedar Hollow Checking	Administration	$86.40

For the check, press **Next #** beside **Check number** and Vine supplies **1048**, the starting check number set in Step 1.

> **TIP**
> If the bank is connected, you can also start from the bank: **Sync transactions** lists what the bank shows, and **Add as transaction** turns a line into an entry. It saves typing the date and amount, but you still choose the category and fund.

Step 9. Reconcile with the bank statement

Once a month, prove that Vine and the bank agree. Cedar Hollow's January statement arrives with an **ending balance of $26,218.23**, dated January 31.

1. Go to **Accounting → Reconcile**, choose **Cedar Hollow Checking**, and press **Start reconciliation**.
2. Enter the **Statement date** (Jan 31) and the **Ending balance** from the statement ($26,218.23). **Beginning balance** fills in with the opening balance you applied in Step 1, here **24,310.42**; it should match the statement's opening balance. Later months carry forward on their own.
3. Press **Auto-match from bank**. Vine downloads the bank's lines and ticks each entry that has a bank line of the same amount within four days. For Cedar Hollow that is the mortgage, the curriculum, check #1048 and the internet bill. It cannot pair anything that adds up from several entries, and it skips what it cannot find, so check its work against the statement.
4. Tick the rest by hand, working down the bank statement. Several of your entries add up to one bank line:
   - Each Sunday's batch posts one line per fund, but the bank shows a single deposit. Tick all of that Sunday's lines. The three lines from January 3 together equal the $1,132.00 deposit.
   - The Stripe entries ($225.00 and $25.00 income, less the $4.69 fee) together equal the two payouts, $96.51 and $148.80. Tick all three.
5. Leave two things **unticked**: check #1049 for $412.18 (written January 15 but not cashed by the statement date: an outstanding check) and the January 31 Sunday deposit of $1,150.25 (taken to the bank on February 1: a deposit in transit). They will be ticked next month.
6. Look at the summary at the bottom. Cedar Hollow shows a **Difference** of **-$12.00**. The statement has a $12.00 monthly service fee that was never entered.
7. Press **Add adjustment for the difference** and confirm. Vine adds a $12.00 "Bank adjustment (fee)" expense dated the statement date and ticks it. The summary changes to **Balanced $0.00 ✓**.
8. Press **Complete reconciliation**.

The reconciled entries are now locked: changing one later needs an Admin override and an extra confirmation. The reconciliation, with who completed it and when, is kept in the history list for the account. Then reconcile **Cedar Hollow Savings** the same way.

> **CAREFUL**
> You cannot finish until the difference is exactly zero, so do not force it. When it will not balance, check in this order: the ending balance and date you typed; an entry that was typed twice or with a different amount than the bank shows; a deposit or check still outstanding that you ticked by mistake; a bank fee or interest not yet entered.

> **TIP**
> The adjustment button books a fee or small credit with no category. If you would rather file the fee under Banking & Processing Fees, press **Cancel**, add it as a transaction (or from **Add as transaction** on the bank screen), and start the reconciliation again; your ticks are not kept when you leave the screen.

Step 10. Check your work and close the month

With January reconciled, take five minutes to look at the result.

- **Reports → Budget vs. Actual**: income and spending against the annual budgets entered in Step 1.
- **Reports → Fund Balances** and **Giving by Fund**: what each fund holds, and what donors gave to it.
- **Reports → Outstanding Payables**: bills still unpaid. Cedar Hollow's list holds February's mortgage bill, which Vine created on February 1.
- **Reports → Executive Summary** (choose Quarterly): the one-page overview for the board, with a downloadable PDF.
- Optional: on **Transactions**, use the lock-date control to freeze everything dated on or before January 31. After that, changing anything needs the override permission and an extra confirmation.

The routine from here

When	What	Where
Every Sunday	Count, then enter the offering as a deposit batch. Finalize once it is at the bank.	Deposit Batches
When a Stripe payout lands	Confirm the card and bank-transfer deposits, then finalize the week's batch.	Online Deposits, Deposit Batches
As bills arrive	Check the amount on recurring bills, get approval where needed, then mark paid.	Bills

As money goes out	Enter debit-card purchases, checks and fees.	Transactions
Monthly	Reconcile each bank account, then look at Budget vs. Actual.	Reconcile, Reports
Quarterly and yearly	Executive Summary for the board, giving statements for donors, 1099 Vendor Summary, copy next year's budget.	Reports, Chart of Accounts

When something does not look right

You see	Likely cause and fix
Cannot finalize a batch: "Pick an income category"	The batch needs an Income category (Tithes & Offerings) and a deposit account on the batch or on each row.
A bill will not pay; it shows as pending or on hold	It is at or above the approval threshold and needs a different login to press **Approve**, or a Finance policy check (**Policy check**) has something outstanding.
Online gift is missing from Giving	Check both Stripe badges show Configured, that the webhook URL in Stripe matches the one on the Vine card, and that the event is **checkout.session.completed**.
Deposit batch total is not the bank deposit	Stripe payouts are net of fees. Compare against the payout amount, not the gross gifts.
Reconcile will not balance	See the Careful note in Step 9. The usual causes are a mistyped ending balance, a duplicate entry, or a bank fee not yet entered.
Cannot change an entry	It was reconciled or falls on or before the lock date. An Admin with the override permission can change it.
Bank connection will not connect	Try again from the account's **Manage** button. Use **Change account** if the wrong account was picked, or **Disconnect** and reconnect. Contact support if it says connections are not available.

For every other screen in Accounting (payroll, reimbursements, cards, compliance, the audit log), see the Giving and Accounting chapter. The circled **?** on each page and pop-up opens help for just that screen.

Service Planning

The Song Library holds your songs. Service Plans turn them into an order of service, schedule volunteers into positions, and export to projection software.

Song Library

- Each song has title, artist, publisher, CCLI number, original key, meter, duration, a web link, lyrics and chords, and attached chart PDFs. Sort or filter by name or by when it was last scheduled to spot songs not sung in a while.
- **Add a song** by hand, import lyrics and chords, or search **PraiseCharts** and import (each staff member connects their own PraiseCharts account once under **Settings → 3rd Party Integrations**; Vine never sees the password).
- Archive songs you no longer use. Put each lyric section's label on its own line, like `[Verse 1]` or `[Chorus]`, with a blank line between sections; that is what turns lyrics into slides.
- Arrangements and a **Musician View** show the chart for a particular service.

Service Plans

1. **Service Planning → Service Plans → New service plan**: title, service type, date, time, and location. Location is chosen from your buildings (add them under Facilities → Buildings & Rooms); a plan saved earlier keeps its typed location until you pick a building.
2. Build the **order of service**: songs, general items (announcements, offering), **Scripture** items and headers. Drag to reorder. Or **Import from template** to start most of the way done.
3. Add **positions** (Worship Leader, Sound, Greeter, Nursery…) with how many you need and the **group** the people come from.
4. Fill positions from the dropdown. Only members of the assigned group are offered; a position's required qualification (set under Position Types) hides people who lack it. People already assigned stay assigned even if the rules change later.
5. **Email reminders** drafts a message listing everyone's assignment; review it and send from the church's server. **Copy addresses** copies the emails instead. The email carries your church logo and the same positions and order of service as the PDF.

> **TIP**
> Scheduling help: people on a blackout date are blocked. Same-time double bookings are blocked. Softer flags (a triangle icon you can click) warn about serving twice the same day, exceeding a person's stated limits, or a household preference to serve together or apart. These are explained, never silent.

Burnout warnings, apprentices and mentors

Vine watches for volunteers who are carrying too much and helps you grow new ones. Both only advise: nothing changes until you press a button.

- **Burnout warnings.** While you schedule, a triangle appears beside anyone who has served most of the last services (for example 11 of the last 12), is scheduled for several services in a row (counting services already planned after this one), or would go past the maximum assignments or the rest they asked for on their profile. Click it for the reason. A note under the position offers **Give this one off**, **Swap in** another qualified, available volunteer with a lighter load, or names someone you could train. Names are listed lightest load first.
- **Levels and mentors.** If a position's Position Type requires a qualification, each name shows the person's level in it (L1 to L5). Levels 1 to 2 are apprentices and levels 4 to 5 are approved mentors. When an apprentice is scheduled with no mentor, the note under the position offers mentors to add beside them. One mentor covers two apprentices by default.
- **Moving apprentices up.** After an apprentice has served several past services in that skill (six by default), the Dashboard shows **Ready to move up** to administrators. **Move to level** raises their level on their People profile; **Not yet** hides the suggestion until they have served more. **Reports → Apprenticeship Progress** shows everyone in training.
- Every number, and both features, can be changed under **Service Planning → Service Plans → Position Types → Volunteer care**.

Accepting and declining

Scheduled volunteers can accept or decline. The Service Readiness dashboard counts only accepted assignments toward a staffing rule; a coordinator can record a phone or text confirmation with **Confirm coverage**. In a service plan, a coloured dot inside each scheduled person's pill shows their answer: **yellow** = waiting, **green** = confirmed, **red** = declined. Click the dot to choose a different status. Reminder emails (the Vine Assistant's “Draft a reminder email”, the plan's Email reminders, and automatic reminders) list each position the person has not answered, with the service, date / time and position and a **Confirm** and a **Decline** button. The button opens a page where they tap Confirm or Decline; that sets the dot. Opening the link alone changes nothing, so email scanners cannot answer for anyone.

The other tabs

Tab	Purpose
Templates	Save positions and an order of service as a reusable starting point.
Position Types	The roles offered in the Position dropdown, each with an optional required qualification, plus the Volunteer care settings for burnout warnings and apprenticeships.

Blackout Dates	When someone is unavailable. Staff and coordinators enter them for anyone; a volunteer linked to their own record manages only their own.
Settings	Service types, **Automatic Reminders** (email scheduled volunteers a set number of days before each service) and **Bible Texts**.

Downloads for projection software

Open a plan and press **Download**: **PDF**, **OpenLP**, **Church Presenter**, **FreeShow**, **ProPresenter 7** or **Vine Presenter**. Songs become slides one section at a time; each scripture verse becomes a slide; headers become dividers. In a Scripture item type references one per line, such as `John 3:16`, `Mt 5:3–10` or `1 Cor 13:4–7 NIV`; a translation abbreviation picks the version (KJV is the default). Translations download the first time they are needed and are remembered in your browser. The Message and CEV are not available online; import their XML files under **Settings** → **Bible Texts**.

- **FreeShow:** import the `.project` file.
- **OpenLP:** open the `.osz` service.
- **Church Presenter:** unzip, import the songs folder, then open the schedule.
- **ProPresenter 7:** File → Import → Playlist with the `.proplaylist` file (a same-named song in your library may be replaced).
- **Vine Presenter:** Playlist menu → Import Playlist… with the `.vineplaylist` file, or drop it on the Vine Presenter window. Headers become announcement items.

Importing straight into Vine Presenter. Instead of downloading a file, Vine Presenter can fetch plans itself. In Vine Presenter's Preferences, enter your church's Vine ChMS address (such as `https://yourchurch.vinechms.com`) and the username and password of a login that can see Service Plans (Admin, Staff or Volunteer, or any login given Service Plans access under **Settings** → **Staff Logins**). Press **Import Service Plan**, choose a plan, and it arrives as a playlist with the same slides and labels as the download. If that login uses two-factor sign-in, Vine Presenter asks for a code once. Changing the login's password, or removing its Service Plans access, signs Vine Presenter out. Vine ChMS supplies verse text only for public-domain translations (KJV, ASV, YLT, Darby, Tyndale). For any other translation, such as NIV or ESV, import your own Bible XML file under **Settings** → **Bible Texts**; it is then also shared with Vine Presenter's import, and your church is responsible for holding that licence. Without it those scriptures arrive as reference-only slides.

Revisions, export checks and room time

- **Revisions.** Each saved change to a plan is a new revision, and a short history is kept. Sending the reminder email or downloading the plan marks that revision as the one volunteers have. If you change the plan afterwards, a line under the buttons says how many changes there are since then, and **Show what changed** lists them (title, date and time, items added, removed, moved or changed, and who was added to or removed from a position). Notes are never copied into the history.

- **Checks before a download.** Before a projection file is made, Vine lists what is missing or will not look right: a song that has left the library, no lyrics, lyrics without section labels, a section too long for a slide, a scripture reference that is not a real passage, or a translation whose text is not available (it will show the reference only). You can go back and fix it or **Export anyway**. A Vine Presenter download also contains a small `manifest.json` naming the plan, its revision and the files inside with their fingerprints. It contains no notes and no links.
- **Setup and cleanup time.** A room can have setup and cleanup minutes (Facilities → Buildings & Rooms). When a reservation leaves less time than that, or the room is smaller than the people expected, Vine explains why and asks for a reason and an end date before you save it. A reservation that overlaps another, or a room that is out of service, is shown as a problem and cannot be excused with an exception.
- **Song Library cleanup. Review library cleanup** lists likely duplicates (never merged for you), songs missing a CCLI number, key or chart, and small tidy-ups you apply one at a time. A song used by a service plan can be archived but not deleted.
- **Regular times I am not available.** A volunteer's profile can list weekdays and times they are not available, and they are not offered for those times. People already scheduled stay on the plan with a warning.

Sermon Studio

Under Service Planning, **Sermon Studio** turns one sermon into discipleship material. Pastors and staff review everything before members see any of it.

1. Press **New sermon** and choose the service from your Service Plans. The title and date come from the plan, and **Preached by** lists the people scheduled for that service (the person in a Preacher, Minister or Speaker position is pre-selected). Add a series if you like. Paste the sermon notes or transcript, or upload a PDF, Word or text file; notes already on the service plan are filled in for you. A scanned PDF has no text to read, so paste it instead.
2. Set your **Church preferences** once: theological tradition, one or two Bible translations, and a statement of beliefs and wording rules (for example "always say Holy Ghost"). Every draft follows them.
3. Press **Generate** beside a resource, or **Generate all**. You get a sermon summary, scripture references with verse text, a seven-day devotional (at least five paragraphs each day), small-group questions, a youth lesson for each class you set up in Check-In settings (a church with no classes gets teens, kids and early childhood) and a four-session follow-up Bible study with at least three pages of teaching notes, a one-page study handout with an answer key, and a short social media post (for staff only; it never appears on the member page). The Bible study is written session by session, so it takes a minute or two and shows its progress.
4. **Review** each one on its own formatted page (**Edit text** opens full-width editors), edit anything that is wrong, and press **Approve**. Any edit returns an approved resource to "Needs review". Regenerating never overwrites something you approved when you use Generate all.

5. The Sermon & AI Assistant that used to be on each service plan now lives here. A plan's older Small Group Guide and hand-out are brought in as drafts when you choose that service, and the **Copy text** button is on each review page.
6. **Post to Buffer:** once Buffer is connected (Settings → 3rd Party Integrations), the Social media post has a **Post to Buffer** section. Approve the post, choose a channel, pick a date and time, and press **Schedule on Buffer**. Each kind of channel shows the settings it needs: Facebook, Instagram and YouTube need a post type, picture or video, title or category as appropriate; Pinterest needs a board and a picture; and so on. **Add a picture or video** by uploading it from your device (JPG, PNG, GIF or WebP up to 20 MB; MP4 or MOV up to 300 MB). You confirm first, Vine sends the exact text, time and media to Buffer, and the post shows under "Sent to Buffer". Change or delete it afterward in Buffer. Buffer collects the picture or video when the post goes out, so Vine keeps the uploaded file until a day after that time and then deletes it automatically.
7. Press **Publish**. Members who have the link see only the approved resources, laid out as one page, with a **Download PDF** button at the top for each area (summary, scripture, devotional, small-group questions, Bible study and each youth lesson). **Unpublish** hides the page again.

- **Scripture text:** the AI only suggests references. The verse text comes from a public-domain translation (such as KJV or ASV) or from a translation your church imported and shared in Settings. Any other translation shows the reference only.
- **Members and progress:** the member page needs no account. A member can subscribe with a name (and an email if they want a personal link) and tick off devotional days and study sessions. You see subscriber counts and who finished the devotional. Members can leave at any time, which removes their record.

GOOD TO KNOW

AI drafts can be wrong or off-doctrine. Treat every one as a first draft for a pastor to check. Sermon Studio has its own permission under **Settings** → **Staff Logins**: **No access** hides it completely, **View only** lets a login read the drafts and the member page details, and **Full access** lets a login edit, approve, generate, publish and post to Buffer. Admin and Staff logins have Full access by default; everyone else has none until you grant it.

Walkthrough: Planning a Sunday Together

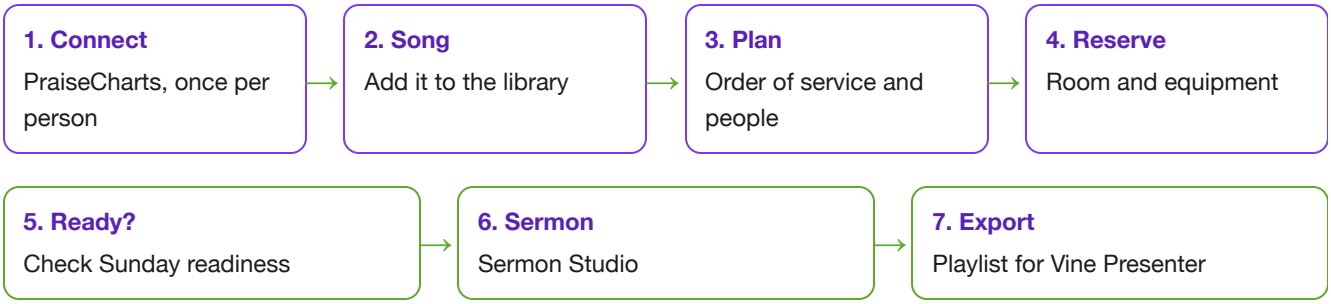
One Sunday, start to finish, for the worship leader and the pastor. This chapter adds a new song to the Song Library (lyrics and chord charts from PraiseCharts included), builds the service plan, reserves the room and equipment, checks Sunday readiness, prepares the sermon in Sermon Studio and sends the order of service to Vine Presenter. Every screen name and button is the real one. The people, songs and dates are invented, so swap in your own.

OUR EXAMPLE CHURCH

Cedar Hollow Fellowship (the same church used in the accounting walkthrough) meets Sundays at 10:00 in the Sanctuary of its Main Building. **Daniel Brooks** is the volunteer worship leader and has the Staff role. **Pastor Marcus Reed** is an Admin and preaches. **Priya Shah** runs sound. The service is **Sunday, January 10**. Marcus is in the middle of a series called *Abide*; this week's sermon is **Staying Connected** from **John 15:1-8**. Daniel wants to open with a song the church has never sung, **How Great Is Our God**, and the church owns the PraiseCharts chart for it.

The order of the work

Daniel and Marcus can work at the same time. Daniel does steps 1 to 4 and 7. Marcus does steps 5 and 6. Step 7 comes last because it sends whatever the plan holds right now.



Before you start

- **Logins.** Daniel needs Service Plans and Song Library access (Staff has both). Marcus needs Sermon Studio (Admin and Staff have Full access by default). To look at Service Readiness and change its rules, a login needs Service Readiness access; Marcus has it as an Admin.
- **Groups.** Each position is filled from a group, so make sure the groups exist and have their people: Cedar Hollow has **Worship Team** and **Sound Team** under **Groups**.
- **Rooms and equipment.** They live in **Facilities → Buildings & Rooms**. Cedar Hollow has the Main Building with a Sanctuary, a Fellowship Hall and a Nursery, and two pieces of equipment: a **Wireless Microphone Set** and a **Sound Console**. A reservation can only pick what is listed there.
- **Your PraiseCharts account**, if you want to bring charts in. Each person connects their own; Vine never sees the password.

Step 1. Connect your PraiseCharts account (once)

Daniel does this one time. Marcus does not need to; he is not importing charts.

1. Go to **Settings → 3rd Party Integrations** and find the **PraiseCharts** card.
2. Press **Connect my PraiseCharts account**. A PraiseCharts sign-in window opens. Sign in there, with your own PraiseCharts login, and approve the connection.
3. The window closes and the card shows **Connected**. **Disconnect** removes it again.

> **GOOD TO KNOW**
> Vine only receives a permission token from PraiseCharts, never the username or password. If the card says PraiseCharts isn't available yet, contact Vine support; the connection is switched on for the platform, not by each church.

Step 2. Add a new song to the Song Library

There are four ways to start a song, all at the top of the song form, and you can mix them: type it in, import ChordPro or plain text, import a **.song** file, or import from PraiseCharts. Daniel uses PraiseCharts for the details and chord chart, then adds the lyrics he wants on the screen.

1. Go to **Service Planning → Song Library** and press **Add song**.
2. Press **Import from PraiseCharts**. In **Import from PraiseCharts**, type **How Great Is Our God** and press **Search** (or Enter). The results are only charts your church owns in PraiseCharts. If it says there are no matches, the title is spelled differently there or your church does not own it yet.
3. Choose the song. In **Choose chart versions** tick the charts you want, for example the lead sheet in the key of G and the one in A for the women's key, and press **Import**. The button shows how many you ticked. Vine downloads each chart as a PDF and attaches it to the song, and fills in the song's details.
4. Check the fields against your own records: **Title**, **Artist**, **Publisher**, **CCLI number** (take it from your CCLI license, not from memory), **Original key** (G), **Meter** (4/4) and **Duration**. **Web URL** can hold a link to a reference recording.
5. In **Lyrics**, paste or type the words with each section's label on its own line and a blank line between sections.

Lyrics need labels because that is what turns them into slides. Here is the shape (the words here are the public-domain hymn *Amazing Grace*; for a licensed song, use the lyrics your CCLI license lets you project):

Type this in Lyrics	What you get

`[Verse 1]`
`Amazing grace, how sweet the sound`
`That saved a wretch like me`
 	
`[Verse 2]`
`'Twas grace that taught my heart to fear`
`And grace my fears relieved`
	Two slides, labelled Verse 1 and Verse 2, in every presentation export. Without label lines each paragraph still becomes a slide, but they are all simply numbered as verses, so a chorus is not named as a Chorus.

Adding or replacing chord charts later

You can add charts any time, from the same song. Open the song with **Edit**, find **Chord charts** and press **Add version**. Give the chart a **Label** such as "Key of G" or "Capo 3", then choose how it is stored:

Choice	Use it when
Text	You type or paste chords above the words. Put the chords on their own line over the syllable they belong to (`G D` above the words). This is what the **Chord Sheet** shows.
PDF	You already have a chart file, for example one downloaded from PraiseCharts or written by your band. Drag the PDF into the box, or press **Choose PDF…**. Replace it later with **Choose a new PDF…**.
PraiseCharts	You want to pull another chart (a different key, a rhythm chart) straight from your PraiseCharts library. Pick it from the list and press **Done**; Vine shows **Downloading…** while it fetches the PDF.

Each version shows in the list with a pencil (edit) and a trash can (remove). Press **Save** on the song when you are finished.

> **CAREFUL**
> Only upload or import charts and lyrics your church is licensed to use. Vine does not check licences. PraiseCharts charts are for your own church's use under your PraiseCharts purchase and your CCLI license.

Arrangements and the Chord Sheet

Back on the song, **Lyrics** and **Chord Sheet** are two tabs. An **arrangement** saves a key and a section order for use in plans. Daniel builds one called "Sunday Open": press **Build arrangement** and click the sections in the order the band plays them: Verse 1, Chorus, Verse 2, Chorus, Bridge, Chorus. Save it. When he adds the song to a plan he can pick this arrangement, and the slides and the Musician View follow that order.

> **TIP**
>
> Sort the library by **last used** to spot songs the church has not sung in a while, and archive songs you no longer use rather than deleting them.

Step 3. Build the service plan

1. Go to **Service Planning → Service Plans** and press **New service plan**. If you keep a regular Sunday **Template**, start from it so the usual items and positions are already there.
2. Enter the **Title** (*Sunday Worship*), **Service type**, **Date** (January 10), **Time** (10:00) and **Building** (Main Building). The building matters for the next step.
3. Build the **Order of service**. Cedar Hollow's Sunday looks like this:

Item	How it is added	Notes
Praise & Worship	**Add header**	A divider, not a scheduled item.
How Great Is Our God	**Add song**	Choose the song, the key (G) and the "Sunday Open" arrangement.
Amazing Grace	**Add song**	Key of G.
Welcome and announcements	**Add item**	General item, 5 minutes.
Offering	**Add item**	General item, 4 minutes.
Scripture reading	**Add Scripture**	Type `John 15:1–8 NIV`, one reference per line. With no version named, KJV is used.
Sermon: Staying Connected	**Add item**	General item, 30 minutes.

Drag items to put them in order. When the order is right and you will use it again, save it as a **Template** from the **Templates** tab.

4. Under **Positions** press **Add position** for each role, choose how many people you need and the **group** that fills it:

Position	Needed	Group	Who
Worship Leader	1	Worship Team	Daniel Brooks
Keys	1	Worship Team	Ruth Okafor
Sound	1	Sound Team	Priya Shah

Greeter	2	Hospitality Team	(open)
Preacher	1	Staff	Pastor Marcus Reed

Only members of the group appear in each dropdown, and anyone on a blackout date is grayed out for that day. A triangle beside a name is a gentle warning (serving twice that day, several weeks in a row, or past a limit they set); click it to see why. Put Marcus in a **Preacher**, **Minister** or **Speaker** position, because Sermon Studio uses that to pre-select the person who preached.

5. Press **Email reminders**, read the message Vine drafts and send it, or press **Copy addresses** to write your own. People can accept or decline. Readiness counts only *accepted* assignments, so ask people to answer.
6. Press **Save & Close**.

> **GOOD TO KNOW**
>
> The first time you **Save & Close** a plan that has a building, a date and a time, Vine reserves that building for the service (for its scheduled length, or 90 minutes if nothing is timed) and a green line under Building says so. Later edits never book it again, and changing the date, time or building afterward does not move the reservation. Adjust it in Step 4.

Open the plan once more and press **Musician View**. It is a clean page for the band with the chord charts for this Sunday's keys and arrangements.

Step 4. Reserve the room and equipment

The building reservation covers the whole building. Daniel also wants the Sanctuary itself, the wireless microphones and the sound console held for Sunday, and the Nursery open for the little ones. These are made under `Service Readiness → Rooms & Equipment`.

1. Press **Add reservation**.
2. Choose the **Resource** (Sanctuary). In **For**, choose **Service plan** and then pick *Sunday Worship, January 10* from the list. (Choose **Event** for a calendar event, or **Ad hoc** for a one-off time such as a Saturday rehearsal.)
3. Enter **Start** (January 10, 8:30 AM for setup) and **End** (12:00 PM). Press **Save**.
4. Repeat for the **Wireless Microphone Set**, the **Sound Console** and the **Nursery**.
5. Add a second **Ad hoc** reservation for the Sanctuary on Saturday, January 9, 7:00 to 8:30 PM: the band's rehearsal.

A double-booking is highlighted. If the Fellowship Hall were also wanted for a lunch after church, you would reserve it the same way, and Vine would flag any other group holding it at the same time. The room and equipment lists themselves are changed in `Facilities`, not here. When the room is cleaned or the equipment is set up, tick **Ready** on its reservation.

Step 5. Check Sunday readiness

Service Readiness answers "is the next service really ready?" against rules your church writes. Nothing is flagged unless a rule covers it, so Marcus sets the rules once and they apply to every Sunday.

The rules (set once)

1. Go to **Service Readiness → Rules** and press **Add rule** for each of these, set to the *Sunday Worship* service type:

Rule kind	Cedar Hollow's setting
Volunteer staffing count	Sound: at least 1 accepted. Worship Leader: at least 1 accepted. Greeter: at least 2 accepted.
All volunteer spots filled with a name	On. A position with nobody is Blocked; partly filled is Needs Attention.
Room reservation and capacity	Sanctuary must be reserved.
Equipment reservation	Wireless Microphone Set and Sound Console must be reserved.
Equipment staged and ready	Wireless Microphone Set, ready 1 day before.
Room cleaned and ready	Sanctuary and Nursery, ready 1 day before.
Room or equipment has no open maintenance issues	Sanctuary, Wireless Microphone Set and Sound Console. A blocking issue is Blocked; an open high or urgent one is Needs Attention.
Service plan completeness deadline	The plan must be complete by Thursday.

A room or equipment marked **out of service** in Facilities is always flagged Blocked on any service that reserves it, with or without a rule.

Reading the dashboard

Open **Service Readiness → Dashboard** and pick *Sunday Worship, January 10*. Issues are grouped (Volunteers, Rooms, Equipment, Service Planning and so on). A group reads **Ready: N rules checked** when its rules pass and **Not checked** when no rule covers it. The overall status is the worst issue found: Ready, Needs Attention, Blocked or Unknown.

On Wednesday Marcus opens it and finds this:

Group	Status	Why
Volunteers	Needs Attention	Only 1 of 2 greeters has accepted.
Rooms	Ready: 3 rules checked	Sanctuary reserved; cleaned-and-ready date not yet reached.

Equipment	Blocked	The Wireless Microphone Set has an open issue that makes it unusable: a dead transmitter.
Service Planning	Ready: 1 rule checked	The plan is complete.

Marcus works down the list. Open an issue to see why, then:

- **Greeters.** Press **Assign responsible** to give the job to Linda Foster, or **Request substitute** to ask for a replacement. When someone confirms by phone, press **Confirm coverage** to record it.
- **Microphones.** Daniel replaces the transmitter and a staff member opens **Facilities → Maintenance Issues**, presses **Mark resolved** and writes what was done. Readiness turns the group green on its next look. If it cannot be fixed by Sunday but a borrowed set will do, Marcus presses **Record explanation** and adds an **exception**: who permits it, the reason, who owns it and when it ends. An exception lowers Blocked to Needs Attention but stays visible, with all four facts, so nobody forgets it.

> **TIP**
> Ask the Vine Assistant "Which unconfirmed volunteers are scheduled on services whose room is blocked?" for a quick list of the people to call when a room or piece of equipment is down. It needs both Service Plans and Facilities access, and it is only a list: nothing is sent or changed until you do it.

Step 6. Prepare the sermon in Sermon Studio

Marcus does this part. Sermon Studio turns the sermon into material for the week and shows nothing to members until he approves and publishes it. It uses AI to write drafts, so every draft needs his review.

Set your church preferences once

1. Go to **Service Planning → Sermon Studio** and press **Church preferences**.
2. Choose your theological tradition and up to two Bible translations, and enter your statement of beliefs and any wording rules (for example, "always say Holy Ghost"). Every draft follows these. Press **Save**.

Add the sermon

1. Press **New sermon**. Choose *Sunday Worship, January 10* from your Service Plans. The title and date come from the plan, and **Preached by** lists the people scheduled for that service with Marcus pre-selected.
2. Type the series name, *Abide*, and change the title to *Staying Connected* if needed.
3. Paste Marcus's notes or transcript, or upload a PDF, Word or text file. A scanned PDF has no text to read, so paste it instead.

4. Press **Generate all** (or **Generate** beside one resource). You get a sermon summary, scripture references, a seven-day devotional, small-group questions, a youth lesson, a four-session follow-up Bible study with a handout and answer key, and a short social media post. The Bible study is written session by session, so it takes a minute or two; leave the page open.

Review, approve and publish

1. Open each resource. Read it as you would read a draft from a stranger: check the doctrine, the verses and the tone. Press **Edit text** to change anything, then **Approve**. Any edit sends an approved resource back to **Needs review**, and **Generate all** never overwrites something you have approved.
2. Press **Publish**. Members who have the link see only the approved resources on one page, with a **Download PDF** button for each area. Share the link in the Sunday bulletin or a Connect email. **Unpublish** hides it again.

Verse text is filled in only from public-domain translations (KJV, ASV, YLT, Darby, Tyndale) or a translation your church imported and shared under **Settings → Bible Texts**. John 15:1-8 in the NIV therefore shows as a reference only unless Cedar Hollow has imported a licensed NIV file. The same is true of the scripture slide in Step 7.

> **GOOD TO KNOW**
> If Buffer is connected (**Settings → 3rd Party Integrations**), an approved social media post can be scheduled from its own **Post to Buffer** section. Vine shows exactly what will be sent before you confirm.

Step 7. Export the playlist to Vine Presenter

Once Daniel has reviewed the plan, the order of service goes to the projection computer. Do this after any last change, since the file is a snapshot.

1. Open the plan from **Service Planning → Service Plans** and press **Download**.
2. Choose **Vine Presenter**. A file called something like `Sunday Worship.vineplaylist` downloads. (The same menu offers PDF, OpenLP, Church Presenter, FreeShow and ProPresenter 7.)
3. On the computer running Vine Presenter, open **Playlist → Import Playlist…** and choose the file. You can also drop the file onto the Vine Presenter window.

What arrives: each song becomes slides one section at a time, labelled Verse 1, Chorus and so on, following the arrangement Daniel picked. The scripture item becomes slides. Headers and general items (welcome, offering, sermon) become announcement items, so the order of the service is kept.

Skipping the file

Vine Presenter can fetch the plan itself. In Vine Presenter's **Preferences**, enter your church's Vine address (such as `https://cedarhollow.vinechms.com`) and the username and password of a login that can see Service Plans. Then press **Import Service Plan**, choose *Sunday Worship, January 10* and it arrives as a

playlist with the same slides and labels. If that login uses two-factor sign-in, Vine Presenter asks for a code once. Changing that login's password, or removing its Service Plans access, signs Vine Presenter out.

> **CAREFUL**
> Scripture in the NIV, ESV or any other licensed translation arrives as reference-only slides unless the verse text is available. Import your own licensed Bible file under **Settings → Bible Texts** (your church is responsible for holding that licence), or install the translation in Vine Presenter, which fills in the text itself during import. Also check that every song's lyrics have section labels; without them the slides arrive numbered as verses with no Chorus or Bridge names. Vine checks this for you before it makes the file and lists anything missing or unreadable first.

The Sunday morning check

- Open **Service Readiness → Dashboard** on Saturday night. Anything not green should have a name next to it.
- Open the plan on a phone or tablet; **Musician View** works well for the band.
- In Vine Presenter, open the imported playlist and click through it once before people arrive.
- After church, take **Attendance** for the plan so the numbers feed your trends.

What each person did

Who	Did	Where
Daniel	Connected PraiseCharts; added the song, lyrics and charts; built the plan and arrangement; invited the volunteers; reserved the room and equipment; exported to Vine Presenter	Settings; Song Library; Service Plans; Rooms & Equipment
Marcus	Set the readiness rules; handled the Wednesday issues; wrote and published the sermon material	Service Readiness; Sermon Studio
Priya	Accepted her Sound assignment; set the equipment as **Ready** on Saturday	Her reminder email; Rooms & Equipment

Calendar, Groups and Messaging

Calendar

- Switch between **Agenda, Week, Month and Year** views. Click an event for its details.
- **Add event:** title, type (coloured), date, optional end date (multi-day events such as a retreat), time, location, organizer, description.
- **Roles:** an event can have its own volunteer roles with counts needed, separate from service positions.
- **Subscribe:** the button at the top of the Calendar page lets anyone add the church calendar to Apple Calendar or Google Calendar (or copy the link into another calendar app). Their calendar then stays up to date on its own, refreshing every few hours. Private events are not included.
- **Private checkbox:** a private event is hidden from the public calendar.
- **Settings → Event Types:** add, rename or recolour types. An event keeps the name it was saved with even if you later rename or remove a type.
- The public calendar (`?calendar=1&view=month`) can be embedded on your website; the 2-Week Follow-up email also reads the next 30 days from here.

Shared Events (working with other churches)

The **Shared Events** tab on the Calendar page is a temporary workspace for an event several churches run together, such as a regional youth rally. Each church keeps its own member records. A workspace holds only what churches type into it.

- **Opt in first:** go to **Settings → Referral Network**, opt in to the referral network, give your login network access, then turn on **Willing to collaborate on events** under Event collaboration. Optionally choose a building from Facilities as your event location. Other churches then see only your name, city, state and distance, never your coordinates.
- **New shared event:** name, dates and place. Your church is the host. Invite churches from the list of churches that opted in. Tick **Geographic zone** to show only churches within a number of miles of one of your Facilities buildings.
- **Invitations:** an invited church sees only the name, dates, place and description until it clicks Join.
- **Inside a workspace:** Registration, Volunteers, Transportation, Facilities, Equipment, Expenses and Messages. Items say whether a church needs or offers something. Only the church that added an item can change or remove it.
  - **Registration:** headcounts only. Take attendance under **Attendance → Shared Events**, then choose **Use attendance count** when you add your church's number.
  - **Volunteers:** choose a group, then use the – / + counter beside each position that group can fill. Use **Add another group** for more. When you offer volunteers, pick the people from those who said they are willing (use **Add person** for more), and optionally a contact person who said it is OK

to contact them. Email and phone show only with the person's OK. A person is removed from the offer if they turn off willing to volunteer, or when an administrator presses the red trash can next to their name. A group's positions are set in Groups (edit the group, **Events / Service Plans**) and come from Service Plans → Position Types.

    - **Facilities and Equipment: Offer** picks from your own Facilities rooms and equipment. **Request** adds a pill everyone can see. Another church clicks the pill and chooses **Fulfill this request**, picking what it will bring from its own Facilities.
    - **Expenses:** request funds with an amount. A church that accepts is taken to your church's giving form, then asked whether to record the gift as an expense in its own ledger.
    - **Checklist (PDF):** downloads the event details with facilities, equipment, volunteers, transportation and funds, who is bringing what, and a box to tick for each.

- **Archive:** the host archives the workspace when the event is over. It becomes read-only, nothing is deleted, and every church can download a CSV for its own records. The host can reopen it.

Groups

A group is a small group, ministry team or volunteer pool. Groups are also how Vine decides who can fill service positions and CareFlow steps.

- **Create:** name, leader, meeting location and time (see below), description, **visibility**, a **maximum** (0 for unlimited), and **leadership handoff notes** for the next leader.
- **Members and administrators:** add people from the directory. A group can have its own **administrators**, logins that manage just that group.
- **Public groups** get a signup link and QR code. Anyone with it can join without logging in; signup can only add people, never remove them. When the group reaches its maximum the link says it is full (staff can still add manually). You can **close a group to new signups** and reopen it.
- **Group events** are scheduled from the group page, one at a time with **Schedule event**, or automatically (see below).
- **Archive** a group to hide it; delete only when it is a mistake.

Meeting place and schedule

- **Meeting location** is a dropdown of the buildings in Facilities, then an optional room in that building. A group made before this keeps the place it had typed (shown as the current value) until you pick one.
- **Meeting time** is the date of the first meeting, the time, and how it repeats: **daily, weekly, every other week, monthly, quarterly, annually** or **Custom**. Custom covers every N days, weeks or months, chosen weekdays (for example Monday and Wednesday), a day of the month (the 15th) and a weekday of the month (the 2nd Monday, the last Friday). A sentence under the fields says in plain words what you set, for example “The 2nd Monday of every month at 6:00 PM, starting October 7, 2026”. A month with no 31st uses its last day.

- **Auto-schedule recurring meetings:** check it and Vine keeps exactly **4 upcoming meetings** on the Calendar. Each night it adds the next meeting after one goes by (never more than 4, never a duplicate), using your church's time zone. They are ordinary Calendar events. Edit or delete one and Vine leaves your change alone; a deleted meeting is not put back. If you change the schedule or place, the upcoming meetings you have not edited are replaced. Meetings of a private group stay off the public calendar. Scheduling an event by hand still works exactly as before.

Events / Service Plans: when you edit a group, tick the Service Plan positions it can fill (a Band group might cover Guitar, Keys, Bass and Drums). Shared Events uses this list when you ask for volunteers by group.

Email and text a group

1. Open the group, choose **Email group** or **Text group**.
2. Write the message. Use `{FIRST_NAME}` to personalize.
3. Send. Messages go out one at a time, never as one email with everyone's address. You see how many went through and, for the rest, why (no email or phone on file, or *Unsubscribed*).

Email needs a From address under **Settings → General → Messaging** (replies go there; mail is sent from Vine's verified address). Texting works through Vine's built-in text service (Twilio) or your own Text In Church account with API access; choose which under **Settings → 3rd Party Integrations → Text messaging → Send texts with**. Built-in texts end with "Reply STOP to opt out", and anyone who replies STOP is not texted again. Every church email ends with a footer naming your church and an unsubscribe link; people who unsubscribe are skipped for your church's emails only.

Video messages

Record a short video and send it to people or groups by email and text. It is under **Members → Video Messages** and is available to administrators; an administrator can give the **Video Messages** permission to a pastor's or another staff login under **Settings → Staff Logins**.

1. Choose **Record a video**. Allow the camera and microphone when your browser asks. If more than one camera or microphone is connected, pick the ones you want from the two lists; a camera you plug in while the window is open shows up in the list. You can also choose **Upload a file instead** for an MP4, MOV or WebM video you already have.
2. Press **Start recording** and **Stop** when you are done (a message can be up to 10 minutes). Watch it back, then **Record again** or give it a title and press **Save**.
3. Vine compresses the video and stores it with your church's other files. The card says *Getting it ready* for a minute or two, then shows a thumbnail with its length.
4. Press **Send**. Choose **Email**, **Text** or both, choose **Everyone**, groups and individual people, write your message (`{FIRST_NAME}` works here too) and press **Preview recipients**, then **Send**.

People do not receive the video file itself. An email shows a picture of the video with a **Watch the video** button, and a text contains a link. Either one opens a plain watch page that plays the video in any phone or computer browser with no sign-in. The same rules apply as for any church message: people who unsubscribed or chose not to be emailed or texted are skipped, and the preview tells you who and why. Each message goes to everyone individually.

A video is kept for **90 days**, then deleted automatically and its link shows a polite “no longer available” page. **Copy link** gives you the watch link to paste anywhere, **Copy embed code** gives you a snippet to paste into your own website so the video plays right on that page (it stops when the video expires), and **Delete** removes a video right away (links already sent stop working). Videos count toward your church's file storage.

Help me find a group

From the account menu, a person (or staff on their behalf) answers questions about schedule, format, childcare, accessibility, language and interests. Vine returns groups ranked with plain-language reasons. A requirement marked **required** (for example an accessibility need) excludes any group that has not specifically confirmed it. On a match, **Request introduction** sends an optional note to the leader, who accepts or declines. If nothing matches, the request goes to a **referral inbox** at the top of the Groups page for a coordinator. When asking to join, Vine also offers to share the person's support preferences with the group's leaders.

Skills, Calling and the Opportunity Board

Every person in the database can have a member login. Members say what they are able and willing to do, and church leaders post needs and see who has volunteered. Nothing is shared unless the member chooses to share it.

Member logins

- On the sign-in page a member chooses **Set up my login** and enters the email address on their People profile. Vine emails a one-time link to that address (it works once and expires in an hour). The link lets them choose a password. Typing an address never signs anyone in or reveals whether it is on file.
- A member login sees only: Dashboard, Calendar, Groups (public groups), Forms and Policies, the Knowledge Base (read only), the Opportunity Board, My Skills & Calling and the Member Directory (names and photos only). It cannot open any other page, even by typing an address.
- Staff and admin logins are never changed by this link. Children under 18, archived people and anyone who opted out are left out of the directory.

My Skills & Calling (members)

- Add professional skills, hobbies, languages, areas of ministry interest, training and certifications, skills to develop and availability to help.
- Tap a skill to choose its level from **1 to 5**: 1 is a novice, 3 is proficient and 5 is a master who can train others.
- **Qualifications on your church record:** tap **Edit** on that card to add or remove qualifications your church has set up and choose your own level (1 to 5) for each. Staff see the same record and can change it too.
- **Member directory:** the directory shows your name and photo. Under **Contact and privacy** you can also tick **My email address**, **My phone number** and **My home address**, each separately, to show them beside your name to other members. All are off until you turn them on, and they are taken from your church record. *Hide me from the member directory* removes you entirely.
- **Contact and privacy:** *I'm willing to volunteer* lets your church offer you for a need, including at events with other churches (Calendar → Shared Events). *OK to contact me* lets your email and phone be shown with your name in those offers and lets you be named as the contact person. Turning either off takes effect right away.
- Choose what to share. Leaders see only the items marked shared, and only people who tick **OK to be contacted** are ever suggested for a need.

Qualifications and levels (staff)

- On a person's profile, tap a qualification to choose its level from 1 to 5 (1 novice, 3 proficient, 5 master). Tap it again to change or remove it. The same levels are used when matching people to needs and, for a position that requires the qualification, to treat levels 1 to 2 as apprentices and 4 to 5 as mentors when scheduling (see Service Planning).

Opportunity Board

- **Create a need:** title, description, ministry or community category, date, how many people, and the skill and level wanted. Needs can be open, filled or closed.
- **Members** see open needs and tap **I'd like to help** (or withdraw).
- **Leaders** open a need to see everyone who volunteered, with their message, then choose **Choose** or **Not this time**. **Suggested people** lists members whose shared skills match, so you can contact someone who never saw the post, for example a licensed electrician for a wiring job.
- **Skills & Calling Directory:** search shared skills across the congregation (admins and ministry leaders only).
- **Facilities:** on a maintenance issue, **Find volunteers** starts a need with the issue, location and matching skill filled in.

Who can do what

Page	Members	Leaders
My Skills & Calling	Own information only	Not applicable
Opportunity Board	View and volunteer	Per login permission: View or Edit
Skills Directory and suggestions	No access	Shared items of people who allow contact

Sign-ins, volunteering and skills changes are recorded in the Audit Log.

Knowledge Base

The Knowledge Base keeps how each ministry runs in one place, so what a volunteer or leader knows stays with the church when they step down. A sound ministry article might cover equipment setup, operating procedures, troubleshooting, vendor contacts, maintenance schedules and emergency steps. Open it from **Knowledge Base** in the main menu, just under Forms and Policies.

Finding and reading articles

- The page lists every article with its groups, qualifications, version and last update. Use the search box, or tap a group or a qualification below it to show only the articles for it. Qualifications are always listed A to Z.
- Every signed-in login, including members, can read articles. Only logins with Full access to the Knowledge Base (administrators, staff and volunteer coordinators by default) can add, edit or delete them. An administrator can change this per login under Settings.

Writing an article

- Choose **New article**, then enter a title and a one-line summary.
- **Groups:** open the dropdown and tick every group the article applies to. A room-reservation article, for example, can apply to the Men's, Ladies and Leadership groups. Under the dropdown Vine lists the other articles for the groups you picked, and each article shows a "More for this group" list when opened.
- Open a group on the **Groups** page and its window lists the **Knowledge Base articles** for that group. Click a title to open the article.
- **Content:** a full text editor. Choose a style (Paragraph, Title, Heading 1, 2 or 3), a font and a size; use bold, italic, underline, strikethrough, superscript and subscript; set text and highlight colors; make bulleted or numbered lists and indent them; align text; add a horizontal rule or a link; clear formatting; and undo or redo. Pasted text keeps its basic formatting.
- **Qualifications:** the church's qualifications (People > Qualifications) appear as tags. Tap the ones this article helps train. New tags cannot be typed in; add the qualification under People > Qualifications first.
- **Linked policies:** tap the policies from Forms and Policies that apply. Readers can open each policy's PDF from the article.
- To remove an article, tap the trash can in its row and confirm. All of its versions are deleted with it.

Versions

- A new article is **version 1.0**. Each saved edit that changes something adds 0.1: 1.1, 1.2 and so on, and the edit after 1.9 is 2.0. Saving without changing anything does not add a version.

- When editing you can add a short note on what changed. It shows in the version history.
- Open an article and look at **Version history** at the bottom. Tap **View** next to an older version to read it exactly as it was. Older versions are view only and cannot be edited. Tap **Back to current version** to return.

Learning from My Skills & Calling

- Under **Skills I want to develop** there is a search box that searches all articles.
- If you rated yourself **1 or 2** on a qualification on your church record, Vine automatically lists the articles tagged with that qualification there. Change your rating under **Qualifications on your church record** and the suggestions update.

Attendance and Children's Check-In

Attendance

Open **Service Planning → Attendance**, choose a service plan or calendar event, and tap names to mark people present. A **guest counter** (+/– or a typed number) adds visitors who are not in People. Totals combine both. **Log a returning guest** fills out a real Connect Card on the spot and adds their name to the roster, which starts them in Guest Follow-up. Attendance also drives the dashboard chart, the status updater and several reports.

Children's Check-In

1. **Check In** tab: set the session (for example "Sunday AM") and date. Search for the child or enter a walk-in.
2. Pick a guardian from suggestions drawn from the child's household, or type one. Add allergy or medical notes.
3. A **class** is suggested from the child's age or grade; override it if needed.
4. **Check in and print label.** A two-page document downloads: the child's label (with allergy notes) and a matching parent claim ticket, both with the same number.
5. At pickup open **Currently Checked In**, confirm the ticket number matches, and press **Check Out**.

- Numbers restart at 1 for each session, so Sunday AM #7 and Wednesday PM #7 are different children.
- Labels are sized for 2.25″ × 1.25″ label printers.
- **Settings → Classes** defines classes by age range or grade range. Reports can flag children near the edge of their range.

Pickup codes. Each check-in prints a short pickup code on the parent's claim ticket (for example `K7QX4M`). To check a child out, enter the code from the ticket. The number alone does not release a child, and the code on another child's ticket does not work. If a parent has lost the ticket, choose **Parent lost the ticket (staff override)** and write why; the reason is saved with the check-out. Children checked in before this change are released as they were. Only a fingerprint of the code is stored, never the code.

Reports

Printable church-wide reports for administrators. Choose one from the dropdown; most have a **Download PDF** button. Financial reports live in **Accounting → Reports**.

Group	Reports
People	Not Yet Received the Holy Ghost · Not Yet Baptized · Requested Baptism, Not Yet Completed · Phone & Address Directory · Birthdays & Anniversaries · Follow-Up Report (people at the status that signals drifting away) · Members Not Connected to a Group
Attendance	Attendance Report (by person, by month) · Attendance by Service · Members Absent 4+ Consecutive Sundays (uses the four most recent Sundays that have attendance recorded; first three status tiers only)
Guests	Visitors Without Follow-Up · Frequent Guests Without a Connect Card (attended three or more times) · Prayer Requests Awaiting Follow-Up (over a month, unanswered) · Guest Follow-up Pipeline · Needing Attention · Assignments by Team Member
Care and volunteers	CareFlow Weekly Status · Cross-Team Volunteer Load (includes services served recently) · Apprenticeship Progress
Worship	**CCLI Song Usage** (monthly, quarterly or annual): song title, CCLI number, service title and date sung, for your CCLI reporting. Download as PDF or spreadsheet (CSV). Only songs in service plans dated today or earlier are counted; songs without a CCLI number show a dash and are counted in the subtitle.
Communication and security	Email Reminder History (also feeds each Communication tab) · Login Log by month (admins only) · **Audit Log** (admins only)
Trends	Attendance trends line chart

Audit Log

Admin **Reports → Audit Log** is the complete record of what happened in your church's Vine ChMS. It is written by the server, can't be edited or deleted by anyone in the app, and records **what** happened and **who** did it, never the contents of notes, messages or amounts.

- **Sign-ins:** every successful and failed sign-in (with the username tried), blocked attempts, sign-outs, two-factor changes, and Vine Presenter sign-ins.
- **Data changes:** any time a person, group, giving record, service plan, song, event, setting or other collection is added, changed or removed, with the record names and which *fields* changed (for example "People: 1 changed (Ann Lee: phone)"), but not the values.
- **Emails and texts:** each one sent or that failed, with the recipient and subject.
- **Social media:** each post scheduled to Buffer (or that failed, with the reason) and each upload.

- **Logins and permissions, settings and integrations, AI generation, public form submissions, backups and exports** (including exporting the log itself).

Choose **Weekly, Monthly, Quarterly, Year to date** or **Annual**, step back and forward with the arrows, narrow it by type, result (failures only), person or a search, and click any row for details. **Download PDF** or **Download spreadsheet (CSV)** exports what you are viewing. Accounting also has its own older Audit Log tab for financial entries; this report is the complete one.

Service Readiness

"Is the next service or event actually ready to go?" The dashboard checks your upcoming services and events against rules that **you** write. Nothing is flagged unless a rule says to check it.

- Pick a service or event. Issues are grouped: **Volunteers, Children's Ministry, Rooms, Equipment, Check-In, Service Planning**. A group reads "Ready: N rules checked" when its rules pass, or "Not checked" when no rule covers it. Overall status is the worst issue found (Ready, Needs Attention, Blocked, Unknown).
- On an issue you can **Assign** a person, request a **Substitute**, **Confirm coverage**, **Open** the plan, or **Explain** (add a note or an **exception**: a permitted, owned, reasoned, time-boxed override that lowers Blocked to Needs Attention but stays visible).

Rules

Rule kinds: volunteer staffing count · required qualification for a role · room reservation and capacity · equipment reservation · children's check-in and class readiness · service plan completeness deadline · all volunteer spots filled with a name · equipment staged and ready · room cleaned and ready · room or equipment has no open maintenance issues · room has enough working items (both read from Facilities). A room or equipment marked out of service in Facilities is always flagged as Blocked on any service that reserves it. Each applies to one service or event type, or to every type.

Rooms and equipment; qualification dates

- **Rooms & Equipment:** the list comes from Facilities, so rooms and equipment are added, changed and removed there (Facilities → Buildings & Rooms). Here you request them: book them for a plan, event or ad hoc time (double-bookings are highlighted), and tick **Ready** once a room is cleaned or equipment is staged.
- **Qualification Dates:** record when someone obtained a qualification and when it expires, so an expired one becomes Blocked and a missing one Unknown. A tag with no dates counts as satisfied but never expires.

Starter rule sets. On the Rules tab, **Starter rule sets** offers a few ready-made groups of rules (Sunday basics, Rooms and equipment, Children's ministry). Choose one to see exactly what would be added; anything that needs a choice from you (which room is the main one, a position your plans do not have) is listed and left out until you decide. Installing adds only rules you do not already have, sends nothing, and an area with no rule still reads Not checked.

Facilities

Keep track of your buildings, the rooms in them, the equipment in each room, and what needs fixing. Facilities feeds **Service Readiness**, so a broken speaker or a room that is out of service shows up before Sunday, not during it.

Buildings, rooms and equipment

- **Buildings & Rooms** is organized as **building** → **room** → **equipment**. Add each building with its name and address, then add its rooms. The rooms list is the same one Service Readiness books against.
- **Inventory** holds what is in each place: chairs, tables, a changing table, speakers, an amplifier. Give each item a category, quantity, condition, make, model, serial number, purchase date and warranty date. Enter how many units are **not usable** (for example 200 chairs, 6 broken) and the **Working** column shows what is left.
- An item can sit in a room, or at building level (storage, a closet) with no room.
- Mark a room **out of service** from its edit screen when it cannot be used.

Maintenance issues

- **Report an issue** from Overview or Maintenance Issues, or press the wrench next to an inventory item. Choose the building, room and (optionally) the equipment, a category, a priority (low to urgent) and a target date. **Assigned to** lists the people in your Maintenance group (Facilities > Settings; **Create Maintenance group** makes one if you have none). **Vendor assigned** is optional and lists the vendors from Accounting.
- **Set reminder** emails the assigned person about the issue on the schedule you choose under Facilities > Settings > Issue reminders. Add as many frequencies as you like: days before the target date, the day of, days after, or every day once past due. The issue needs a target date and an assignee with an email address, and reminders stop when it is resolved.
- Tick **This makes the space or item unusable** when it must be fixed before use. Service Readiness then shows any service that depends on it as Blocked.
- Open an issue to add updates, then **Mark resolved** with what was done and the final cost. If the issue was about a specific item you can set it back to Good in the same step.

Scheduled maintenance

Scheduled Maintenance lists recurring jobs (HVAC filters, fire extinguisher checks, sound system service). Each is due a set number of days after it was last done; press **Mark done** to restart the clock. Overdue and due-soon jobs show on the Overview.

Using Facilities in Service Readiness

Under Service Readiness > Rules add **Room/equipment has no open maintenance issues** (blocking issues are Blocked; open high or urgent issues Need Attention) or **Room has enough working items** (for example 150 working chairs in the Sanctuary). The Facilities Overview also lists upcoming services whose reserved room is currently blocked.

> **GOOD TO KNOW**
> Facilities is available to Admin, Staff and Coordinator logins. Permissions can be changed per login in Settings.

Scenario Planner

Model the effect of a ministry decision using your current data, without changing any live record.

1. Choose a type: **Add another service**, **Expand children's ministry capacity**, **Increase ministry frequency**, or a custom type (admins, staff and finance can add custom types with their own number, percent, dollar, date or text questions).
2. Name it. A read-only **Baseline** shows current services, attendance, volunteers and rooms.
3. Enter assumptions (expected attendance range, extra positions, new costs) and press **Calculate**.
4. Read four cards: **Volunteer need**, **Room/equipment** (over capacity at your high estimate), **Budget impact** (annualized against unrestricted and board-designated funds) and **Unmet requirements**. Click any number to see how it was computed.

GOOD TO KNOW

A saved scenario keeps its baseline and results exactly as saved, so leadership sees the figures you presented. It never edits a service, volunteer or budget. Budget data comes from Finance, so grant this module deliberately; without Accounting access the planner hides fund balances.

Forms and Policies

Admin-only by default. **Policies** is a sortable table of your church's policy documents (name, policy number, date revised) with an uploaded PDF each; **Add policy** to upload, pencil to edit, **View Policy** to open. **Forms** lists every public link with copy, embed and QR tools (see *How Requests Arrive*). Forms and Policies have separate permissions.

Settings and Administration

For administrators. **Settings** in the menu has four tabs; each other section also has its own small Settings tab.

Staff Logins

- **Add or edit a login:** name, username, role, temporary password (the person must change it at first sign-in), photo, and an optional **linked person record** that connects the login to the person's profile. The link is what enables My People profile, My Care, blackout dates for volunteers and "mine" widgets.
- **Permissions table:** per module, **No access / View only / Full access** (Settings is a single on/off checkbox; Staff Logins always stays admin-only).
- **Specialized switches:** edit or delete reconciled or locked transactions · delete finalized deposit batches · pastoral care / counseling access · prayer request access · see benevolence history on a profile · benevolence registry access · design Guest Follow-up workflow · design CareFlow plans. The two delete and two design switches are always on for Admins; pastoral, prayer and benevolence access are never automatic.
- **Create accounts for scheduled volunteers:** finds anyone scheduled in a plan without a login, and creates one each, emailing the username.
- **Two-factor:** a login with two-factor sign-in on shows a **2FA** badge. If that person loses their phone and recovery codes, press the lock button on their row to turn it off so they can sign in with a password and set it up again.
- The last administrator cannot be removed or demoted. Deleting a login ends that person's sessions at once.

General

- **Branding:** church name, address, home state (for the out-of-state giving notice), time zone, EIN, logo, and three brand colours. The whole app re-themes in light and dark mode; Reset returns to the Vine palette.
- **Messaging:** From and Reply-to address for email, and **Send a test email**.
- **Data Backup & Restore:** Export backup downloads everything for your church as one JSON file (it excludes Stripe, Plaid, Checkr, Buffer and email credentials). **Import backup** replaces the entire database and signs everyone out; use it for recovery or moving.

3rd Party Integrations

Integration	Use

Stripe	Online giving. Each church connects its own account; a collapsible "Set up in Stripe" guide gives the webhook URL and the donation link.
Checkr	Request background checks from a person's profile; results arrive automatically. A collapsible guide gives the webhook address.
CareFlow reminders	Daily reminder emails for due and stalled steps; "Send now" to test and a last-ran time.
Text messaging	Text a group and send visit reminders by text. Choose **Built-in (Twilio)**, which needs no setup of your own, or **Text In Church**, which needs your own account with API access enabled by their support.
Buffer	An administrator pastes a Buffer **API key** (Buffer's Settings → API; Buffer does not use your email and password for this). It is checked with Buffer before it is saved. Staff can then schedule a sermon's social media post to your Buffer channels from Sermon Studio.
PraiseCharts	Each staff member connects their own account to import charts.

Bank linking (Plaid) is set up once for the platform; each church simply links its own accounts under Accounting.

Referral Network

An Admin opts the church in with the **Opt in to the referral network** button. That shares your church's name and address (from Settings → General) with the other churches that have opted in, and shows you theirs under **Churches in the network**. Update shared name & address re-sends them after a change; Leave the network removes you from the list.

Next to each church is a checkbox, *I opt to share my details with this church*. Ticking it moves that church, in bold, into **Connected churches**; unticking moves it back. Only connected churches appear when you search for assistance offerings, send a referral, or invite churches to a Shared Event. Sharing is one-way: a church is only connected for you once you tick it, and the list notes when a church already shares with you.

Then grant specific logins network access individually (never by household or role). This is separate from benevolence access and from staff role.

Event collaboration (same screen): turn on *Willing to collaborate on events* so other churches can find and invite you to Shared Events on the Calendar page, and pick a Facilities building as your event location so churches can filter by distance. Building addresses in Facilities are entered as street, line 2, city, state and ZIP.

Settings that live inside each section

Section	What is there

People	Status names, automatic status updates, name display, custom fields, import/export, duplicates, unassigned prayer requests, background-check expiry
Calendar	Event types and colours
Service Plans	Service types, Automatic Reminders, Bible Texts
Check-In	Classes by age or grade
CareFlow	Care types, playbooks
Plan Your Visit	Arrival information and reminder timing
Accounting	Bank connections, fiscal year, Stripe fees, lock date, recurring bills, benevolence registry

Your subscription

Your church's subscription is managed on the Vine website's **Account** page (vinechms.com, "Login"), separate from the app. It shows your billing cycle and invoices, lets you update your card, cancel (effective at the end of the paid period, with a Keep my subscription button) and resubscribe. A trial church shows a countdown banner; a late payment shows a 14-day friendly warning before suspension. Suspension never deletes data, and paying switches the church back on.

Notifications, Email and Reminders

What	How it reaches people
CareFlow step due or overdue	Daily email to the owner, plus a browser notification on their devices that have notifications on
Stalled Guest Follow-up step (7 days)	Email to the assignee, once per step
Plan Your Visit	Confirmation email at booking; reminders by email or text (and a device notification if the guest opted in) at the hours-before you set, checked hourly
Service volunteer reminders	Sent automatically N days before the service (Service Plans → Settings → Automatic Reminders), or by a person from the plan (Email reminders)
Group email and text	Sent by a person from the group
Recurring bills	Created each morning automatically
Background-check status	Updates itself from Checkr

Turning on notifications for your device

1. Open **picture → My Profile**.
2. Switch **Notifications on this device** to On and allow the browser's prompt. A test notification arrives.
3. Repeat on each phone or computer you want alerts on. Switch it Off the same way.

On iPhone and iPad, first add Vine to your Home Screen and open it from there. Notifications are free and need no extra account. Demo churches never send them.

Unsubscribing

Church emails to people in your records carry an unsubscribe link (and a one-click version for mail programs). Unsubscribing applies to that church's emails only; sign-in and password emails still arrive. Staff cannot re-subscribe someone; the person can use **Subscribe me again** on the same page.

Privacy and Security

- **Your church's data is yours alone.** Every record belongs to one church and every request is limited to the church of the address you are on. Another church's login does nothing at yours.
- **Your server checks permissions,** not just the screen. A hidden button is also a locked door.
- **Most sensitive areas need explicit switches:** pastoral care notes, prayer requests, benevolence. Admins do not get them automatically.
- **Benevolence names never reach the general ledger.** The cross-church registry shares only a name and a date, and only if you opt in.
- **Vine Assistant and AI Search** never read pastoral, prayer, benevolence or medical information.
- **Sessions** last up to two weeks. Repeated wrong passwords or wrong two-factor codes pause sign-in. Passwords are changed at first login.
- **Two-factor sign-in** (authenticator app) is available to every login and optional. See *Getting Started*.
- **Backups:** your own export (Settings → General) contains only your church. Platform backups run nightly.
- Read the full **Privacy Policy** and **Terms of Service** from the footer of every page.

Troubleshooting and Getting Help

Problem	Try this
Sent back to the sign-in page, or a section is suddenly empty	Your session expired. Sign in again.
I can't see a menu item or tab	Ask an admin to check your role and permissions under Settings → Staff Logins.
I can't see Pastoral Care, Prayer Requests or Benevolence on a profile	Each is a separate switch on your login, even for admins.
Email isn't sending	Set a From address under Settings → General → Messaging and use Send a test email. People who unsubscribed are skipped by design (shown as Unsubscribed). Email is off in the demo.
Texts aren't sending	Check Settings → 3rd Party Integrations → Text messaging. Built-in needs nothing more; Text In Church needs an account with API access and the key saved. Numbers that replied STOP, or whose owner turned off texts, are skipped.
Can't finish a reconciliation	The difference must be exactly zero. Check the statement date and balance and use Auto-match.
A guest isn't on the Guest Follow-up board	A Connect Card must exist and not be archived.
A guest can't move past step 1	Add them to People first (View Connect Card → Add to People).
Can't edit a transaction	It is in a reconciliation or locked period; it needs the override permission.
Notifications toggle is missing	The browser doesn't support them, the server hasn't enabled them, or (iPhone/iPad) Vine isn't on the Home Screen.
I lost my phone and can't get a two-factor code	Use one of your recovery codes in the code box. If you have none, ask an admin to turn two-factor off for you in Settings → Staff Logins.
My two-factor code is rejected	Codes change every 30 seconds and each can be used once. Check your phone's clock is set automatically, wait for the next code and try again.
Page looks stale after an update	Hard refresh (Cmd+Shift+R or Ctrl+F5). On a phone, close and reopen the app.
"You're offline, your last change was NOT saved"	Reconnect and repeat the change.

Someone else edited the same record	Vine merges different-record edits automatically. If you are told the latest version is shown, redo your change.

Where to get help

- **In-app help:** the circled **?** in the top bar explains the page you are on, and the **?** in a pop-up window's header explains that window. Both can open the FAQ at the matching articles.
- **Knowledge base and FAQ:** the **Help** link in any page footer opens the Vine support site (vinechms.com/vine-chms-support.html).
- **Open a ticket:** **picture → Open a support ticket…**. Quote your Church ID and User ID from the footer.
- **Billing and subscription:** the Account page on vinechms.com.