

PlanetaChurch Finance User Guide

Introduction

Welcome to PlanetaChurch Finance, a financial management solution designed specifically for churches, ministries, and nonprofit organizations. The system provides a simple and organized way to manage donations, donors, bank deposits, funds, expenses, reports, contribution statements, user activity, backups, and user accounts.

This guide provides a general overview of each section of the application and explains how to use the system effectively.

Dashboard

The Dashboard serves as the central overview of your church finances. It displays key financial information such as total donations, deposits, expenses, fund balances, and recent activity. Church administrators can quickly review the overall financial health of the organization and identify areas that may require attention.

The Dashboard is designed to provide a real-time snapshot of financial activity without requiring users to navigate through multiple sections.

Donations

The Donations module is used to record and manage all contributions received by the church. Each donation can be assigned to a specific donor, fund, and donation category.

Accurate donation records help maintain transparency, generate contribution statements, and provide detailed financial reporting. Donations entered into the system become available for deposits, reports, and donor history tracking.

Donors

The Donors section maintains a complete database of individuals and families who contribute financially to the church.

Administrators can store donor contact information, track contribution history, and generate donor statements. Maintaining accurate donor records helps simplify communication and improve financial reporting.

Bank Deposits

The Bank Deposits module allows users to group multiple donations into a single bank deposit record.

This process helps reconcile donation records with actual bank transactions and provides a clear audit trail. Deposits can be reviewed later through reports and historical records.

Funds

Funds represent individual financial accounts, ministries, projects, building campaigns, missions programs, or any designated purpose established by the church.

Each fund maintains its own income, expenses, and available balance. This allows church leadership to track financial activity separately and maintain accountability for designated giving.

Fund balances are automatically updated as donations and expenses are recorded throughout the system.

Expenses

The Expenses module is used to record all outgoing payments made by the church.

Examples include utility bills, payroll, maintenance expenses, ministry purchases, insurance payments, missions support, office supplies, and other operational costs.

Expenses can be assigned to specific funds and expense categories. The system automatically updates fund balances and provides warnings when an expense exceeds the available balance of a fund.

Categories

The Categories section allows administrators to manage both Donation Categories and Expense Categories.

Categories help organize financial records and improve reporting accuracy. Donation categories can be used to classify different types of contributions, while expense categories help classify outgoing payments.

Categories can be activated, deactivated, edited, or created at any time.

Donation Reports

Donation Reports provide detailed analysis of contribution activity.

Users can review giving trends, analyze donations by fund or category, and generate summaries for specific periods. These reports help church leadership evaluate financial growth and monitor giving patterns.

Reports can be filtered to display only the information relevant to a specific ministry, fund, or reporting period.

Expense Reports

Expense Reports provide visibility into church spending and financial stewardship.

Reports can be filtered by fund, category, payment method, and reporting period. Summary information such as total expenses, average expense amounts, transaction counts, and spending breakdowns are available to help leadership monitor expenditures.

These reports support better budgeting and financial decision-making.

Contribution Statements

The Statements module allows users to generate contribution statements for donors.

Statements summarize giving activity for a selected date range and can be printed or exported for distribution. Churches commonly use these statements for annual giving summaries and donor recordkeeping.

Contribution statements provide a professional and organized way to communicate donation history to church members and supporters.

Activity Logs

The Activity Logs section records important actions performed within the system.

Examples include user logins, donation entries, expense modifications, record deletions, updates, and administrative actions.

Activity logs help maintain accountability and provide a historical record of system activity.

Backup & Restore

The Backup & Restore module helps protect church financial data.

Administrators can create backup files containing the church database and restore those files when necessary. Regular backups are strongly recommended to ensure that financial records remain protected and recoverable.

Backup files should be stored securely and maintained according to the church's data protection policies.

User Management

The User Management section allows administrators to manage user accounts and permissions.

Users can be assigned different roles based on their responsibilities within the organization. Administrators can create new accounts, modify existing accounts, reset passwords, and control access to financial information.

Proper user management helps maintain security and accountability throughout the system.

Best Practices

To ensure accurate financial records and reliable reporting, consider the following recommendations:

- Record donations promptly after they are received.
 - Create bank deposits regularly to maintain accurate reconciliation.
 - Assign all transactions to the appropriate fund and category.
 - Review expense reports frequently.
 - Generate contribution statements periodically.
 - Create backups on a regular schedule.
 - Limit administrative access to authorized personnel only.
 - Review activity logs periodically for accountability purposes.
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Conclusion

PlanetaChurch Finance was designed to simplify church financial management while maintaining accuracy, transparency, and accountability. By properly utilizing donations, funds, expenses, reports, statements, and

backups, church leaders can maintain organized financial records and make informed decisions that support the ministry's mission and growth.