



# Chaverware™ 5

## *The Gold Standard in Synagogue Management Software®*

### **System**

- Compatible with Windows XP, Vista and Windows 7
- Fully integrated with a professional, complete Windows based accounting package  
(Single user license of either Peachtree Complete or QuickBooks Pro is included)
- Daily automatic backup of data (On local network)
- Microsoft Office integration
- Constant Contact® integration for mass emailing in HTML format
- Internet Connectivity

### **Membership Information**

- Unlimited Family Database includes individual information for each adult and child:
  - Four different mailing addresses (winter, summer, etc.) with automated activation dates
  - Occupational information including address, phone, fax, email address
  - Emergency names, numbers and relationships
  - Pager, Cell Phone, E-mail address
  - Dynamic update of ages
  - School attendance with college information
  - Birthdates with Hebrew date conversion
  - Anniversaries
  - Blood Types
  - Bar/Bat Mitzvah Information, including automated portion calculator
  - Multiple Notes Records - free form notes with date stamp and individual not security
- Reminders for individual members and users**
  - User defined fields
  - Flexible and simple Mail Merge capability

### **Accounts Receivable**

- Global billing - Charge dues and other categories automatically for entire membership
- Special billing by member, e.g., Monthly, Quarterly, Annual or other user defined option
- Receive cash for donations or other “non billed” items
- Receive cash from 3<sup>rd</sup> parties and direct the tax receipt letters to the payee’s account**
- Automatic distribution to General Ledger and Accounts Receivable accounts
- Automatic calculation of tax deductible amounts and generation of appropriate letters
- Full member’s statement generation with customizability
- User defined messages may be printed on Statements
- Payment / Cash receipt reports by Member or Category
- Flexible Aged Receivable reports

## **Accept and process credit card directly in Chaverware™**

- avoids double entry
- Allows for recurring credit card payment setup
- No additional equipment required

## **Web Module**

Member lookup through secure internet connection  
User Name and Password unique to each family  
Synchronization of data on the web with data in the office  
Make donations to selected categories from Chaverware™  
Automatic update of software from the web  
Optional Backup data to the web  
*There is an additional cost for the hosting of the data on the web*

## **Multi Level Categories**

**Unlimited** categories, all user definable

From each category:

- mail merge
- Create mailing labels
- Create envelopes
- Email to the entire category at once.
- Export to Excel
- Create a new category of selected individuals

Create Sub-Categories for as many categories as you like

### **Password restricted categories by user/group**

Information is linked to any individual in the database, with no limit on the number of Categories assigned to one person.

Category examples are:

Board of Trustees	Youth Groups
Donation Funds	Member/Donor Characteristics
Multiple Dues classifications	Committees
Events	Classes
Sisterhood and Men's Club	Talents
Hobbies	Interests

## **Yahrzeit management**

Link multiple members to each Yahrzeit record  
Automatic generation of Yahrzeit reminders and lists  
Plaque location  
Tracks by Jewish calendar date and/or Gregorian date  
Enter either Hebrew or Gregorian date and get a converted date in return  
Plaque Status and location reports  
Maintain data on burial, unveiling, funeral and much more.

## ***Fully featured, graphical Cemetery module***

### **Manage one or more cemeteries graphically**

Track available graves, reserved graves and occupied graves

Information includes:

- Full burial information
- Perpetual care information
- Responsible party data

## ***Mail Merge, Reports and Queries***

Hundreds of predefined reports with different sorting and filtering options

Avery mailing label formats

Easy creation of user defined quick reports

Query generator:

Produce a list based on any criteria

Do a query on a query, removing almost all limitations of looking up data.

Results of a query can be

- Used to produce a quick report
- assigned to any category
- mail merged to an existing or new document in Microsoft Word
- **mail merged to an existing or new document in Microsoft Publisher**
- seamlessly exported to:
  - Microsoft Excel®
  - Microsoft Access®
  - ASCII delimited files

Takes advantage of Office compatibility for full function mail merge to Microsoft Word®

Choose from existing mail merge templates

Create form letters, reminder post cards; utilize Word's label options simply etc.

## ***Donation Database***

Keeps track of all pledges and donations by category

Automatically create billing entries

**Allows pledges to be split over multiple years and other cycles**

User defined information

## ***Tribute Module***

Create a tribute record for a donation

Store donor and honoree information

**Mail Merge letters to both donor and honoree in a single step**

## ***Aliyah Module***

Track honors given to your members

Specify Holidays and Dates and venues

Specify time and pages

Mail merge for notification letter

### ***Shalach Manot Module***

- Create Shalach Manot gift records for multiple recipients
- View and edit from each Giver's screen
- Retain past years records
- Create reciprocating records for those who opted
- Give to the "Entire Congregation" or to an entire "Category" of people (i.e. Staff)
- Print Card Enclosures
- Print reports sorted by Giver, Recipient, Zip Code
- Optionally create bills for Shalach Manot

### ***High Holiday Seating Module***

#### **Create seat layout graphically on the screen**

- Seats can face any direction
- Flexible seat numbering
- Multiple Events for one room
- Multiple venues per holiday per year
- Handicap seat indication
- Generate bills from seating module
- Hold or Reserve a seat
- Assign seats by family for a group of people
- Print reports by seat location or by last name
- View previous year seating locations

### ***Microsoft Office compatibility***

- Seamless mail merge of a single record or a group of records with Word or Publisher
- Integration with Excel for spreadsheet solutions
- Integration with Access for database manipulation

### ***Calendar***

- Full Hebrew/Gregorian date conversion in either direction
- Holidays and Rosh Chodesh (Beginning of the month) listed
- Weekly portion and Haftorah automatically computed

### ***Phone Tree® Integration***

- Links to the Phone Tree® automatic dialer for making automatic calls to selected groups of people

### ***Constant Contact® integration***

- Upload any set of names and email addresses **directly** to Constant Contact® from your Chaverware categories.

### ***School Module (Additional cost)***

- Maintain Staff with address and phone information
- Create classes with specific teachers
- Assign students to each class
- Maintain Transportation routes with students
- Track attendance

## ***Fully Networkable***

Multi-User with login name and password

Multiple level password protection for each area of the program

- Families
- Categories
- Queries
- System Administration
- Yahrzeits
- Accounting
- Seating
- Notes

All of these areas have different “rights” assignable to a user in any combination as follows:

- View Only
- Edit Records
- Add Records
- Delete Records

In addition there are specific “rights” for each area.

Password protected restricted categories

Private protected notes

Create Groups of Users with common rights

Supports most common networks

## ***System Requirements***

Pentium 4 with Hyper Threading 2.4 GHz or better

1 GB RAM

500 MB Free Disk Space

Windows XP or better

Microsoft Office XP (2002) or better (for mail merge with Word)

## ***COMPLETE ACCOUNTING CAPABILITIES***

Chaverware™ includes a single user license for either Peachtree® Complete or QuickBooks® Pro. The features listed below are a summary of the features available in either Peachtree® or QuickBooks®. Chaverware provides seamless integration to both programs as follows:

### **Peachtree Accounting for Windows**

- 3.0, 3.5, 3.6, 4.0, 4.1, 4.5, 5.0, 7.0
- 8.0, 2002, 2003-Regular & Complete
- 2004-Regular, Complete & Premium
- 2005-Regular, Complete, Premium & Accountant
- 2006 -Regular, Complete, Premium Accountant & Premium Non-Profit
- 2007, 2008, 2009 and 2010

Complete, Premium Accountant & Premium Non-Profit,  
Quantum, Quantum Accountant

### **QuickBooks**

- 2002 Pro
- 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010 Pro, Pro Canadian, Pro UK, Premier, Premier Accountant, Premier Non Profit, Premier Canadian, Premier Accountant Canadian, Premier Non Profit Canadian, Premier Accountant UK

## ***General Ledger***

Completely customizable Financial Statements  
Live Trial Balance output at any time  
Budget entry and comparison of budget vs. actual  
Fiscal calendar with up to 13 periods - Up to 3 years of information available on-line!

## ***Accounts Payable***

Supports Purchase Order generation to help control and track costs  
Print single checks, record hand written checks, or print checks by batch  
Automatically distributes costs to General Ledger  
Prints full aging reports

## ***Payroll (Additional Cost)***

Automatic payroll generation, including all withholding taxes  
Automatic deduction of all other deductions  
Tax updates available, Tax table modification with user created formulas  
Pay both hourly and salaried employees  
Tracks vacation and sick leave  
All standard payroll reports, including Federal forms 940, 941, W2, etc.

## ***Bank Reconciliation***

Multiple checking accounts supported, Track checks and deposits

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## ***Chaverware™ also has export/import links to:***

- Adagio
- AccPack
- BlackBaud
- MAS 90 (Versions 3 & 4)
- MIP Accounting
- Real World
- Sage Business Works
- Small Business Accounting