

Chaverware[™]

The Gold Standard in Synagogue Management Software®

Chaverware[™], the most sophisticated and most popular Synagogue management software, is available as a Windows installation or as a hosted browser based solution. Both versions seamless integration with both QuickBooks® and Peachtree (Sage 50)®. Chaverware[™] boasts the easiest integration with other standard programs in addition to QuickBooks® and Peachtree(Sage 50)®. Integrated credit card processing; seamless mail merge with Microsoft Word® or Publisher®; instant export to Microsoft Excel®; email to your default email program; link to Constant Contact®; get directions to any address in Chaverware with a single click and so much more.

With ChaverWeb[™] added on to Chaverware, your members will be able to access their own information for review as well as editing through a secure internet log in. They may look up and edit their Yahrzeits, maintain their personal information, review their account status and make payments against their bill, make donations to your organization and register and pay for events taking place at your Synagogue. Additionally, your members can now register their children for Religious School and view a secure online directory. **ALL** of this can be done from the comfort of their home or office. The outcome of this will be **an increase in fundraising** with a reduction in office and volunteer time. Through the use of the ChaverWeb, your office staff will save countless hours or data entry resulting in an improved bottom line.

System

Chaverware 5 is compatible with Windows XP, Vista , Windows 7, Windows 8

Chaverware 6 run in Firefox, Internet Explorer, Safari and Google Chrome

Fully integrated with a professional, complete accounting package

(Single user license of either Sage 50 or QuickBooks Pro is included)

Daily automatic backup of data (On local network or on the internet)

Microsoft Office integration

Constant Contact® integration for mass emailing in HTML format

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 3rd 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

ChaverWeb Module (Additional cost)

Member lookup through secure internet connection
Yahrzeit viewing and editing
Account review and payment
Sign up and register for events
Register for Religious School
View a secure **online directory**
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

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 (Optional online module available)

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, 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

Chaverware – Multi-User out of the “box”

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 for Chaverware 5

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/Sage Accounting for Windows

- Regular, Complete, Premium Accountant & Premium Non-Profit, Quantum, Quantum Accountant for 2007, 2008, 2009, 2010, 2011, 2012
- Sage 50 2013,2014

QuickBooks

- 2002 Pro
- QuickBooks Online
- Pro, Pro Canadian, Pro UK, Premier, Premier Accountant, Premier Non Profit, Premier Canadian, Premier Accountant Canadian, Premier Non Profit Canadian, Premier Accountant UK for: 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014

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

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