

Shepherd Pay

User Guide

Step-by-step instructions for every screen, with pictures

English

Version 2.0 · Rehovot Tech Solutions

Contents

Roles in Shepherd Pay 3

1. Getting Started 4
- Login 4
- Dashboard 5
- Select Language 6
- Profile 7
- Edit Profile 8

2. Your Church 9
- Join a Family 9
- Create Church 10
- Church Management 11
- Inbox 12

3. Families 13
- Create Family 13
- Family List 14
- View Family 15
- Family Card Design ★ 16

4. Billing & Payments 17
- Billing 17
- Billing Details 18
- My Contributions 19

5. Accounts & Expenses 20
- Summary 20
- Add Expense 21
- Expenses 22
- Church Needs ★ 23

6. Notices & Celebrations 24
- Create Notice ★ 24
- Notifications 25
- Upcoming Celebrations 26

7. Super Admin Controls 27
- Approve Expenses 27
- Bank Summary ★ 28
- Manage Admins 29
- Admin Activity ★ 30
- Settings ★ 31
- Edit Church 32

8. More 33
- WhatsApp Messaging 33
- Premium 34
- Help & Support 35

Roles in Shepherd Pay

Super Admin

The person who created the church. Can do everything, including approving expenses, Bank Summary and managing admins.

Admin

A helper such as the treasurer. Can bill families, manage families, add expenses and post notices.

Member

A church family. Sees their own contributions, notices, celebrations and the Summary.

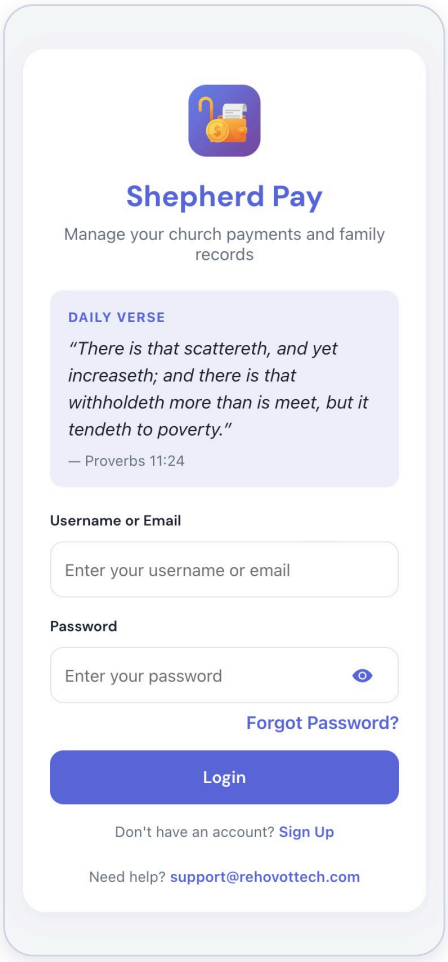
★ Premium · Names, phone numbers and emails in the pictures are examples. Some screens are Premium features.

1 GETTING STARTED

Login

Everyone

Sign in to Shepherd Pay with your username or email and password.



HOW TO USE IT

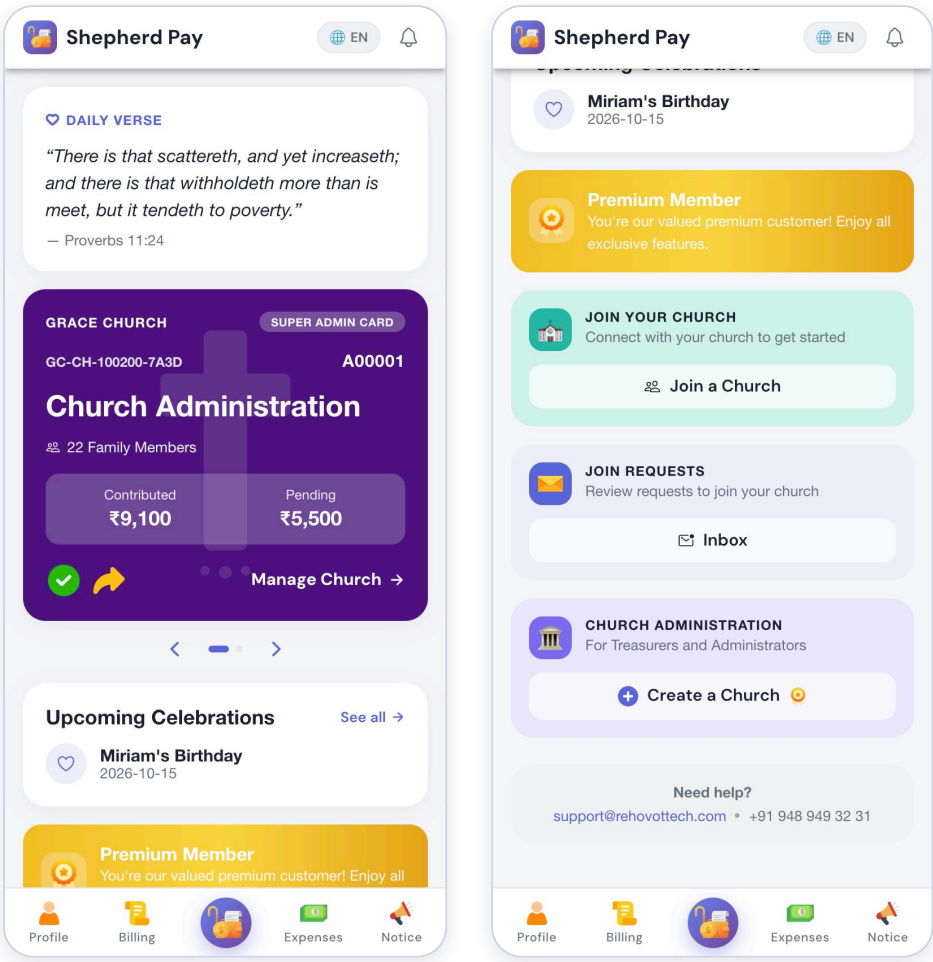
1. Enter your username or email and your password.
2. Tap **Login**.
3. New here? Tap **Sign Up** to create an account. Tap **Forgot Password?** to reset a forgotten password.

1 GETTING STARTED

Dashboard

Everyone

The home screen. It shows the daily verse, your church card, upcoming celebrations and quick actions.



HOW TO USE IT

1. Swipe the church card to switch between your church and family cards.
2. On the card, see the total Contributed and Pending amounts.
3. Tap **Manage Church** to open all church tools (Admins only).
4. Use the bottom bar: **Profile**, **Billing**, Home, **Expenses** and **Notice**. Members see **Contribution** and **Summary** instead of Billing and Expenses.

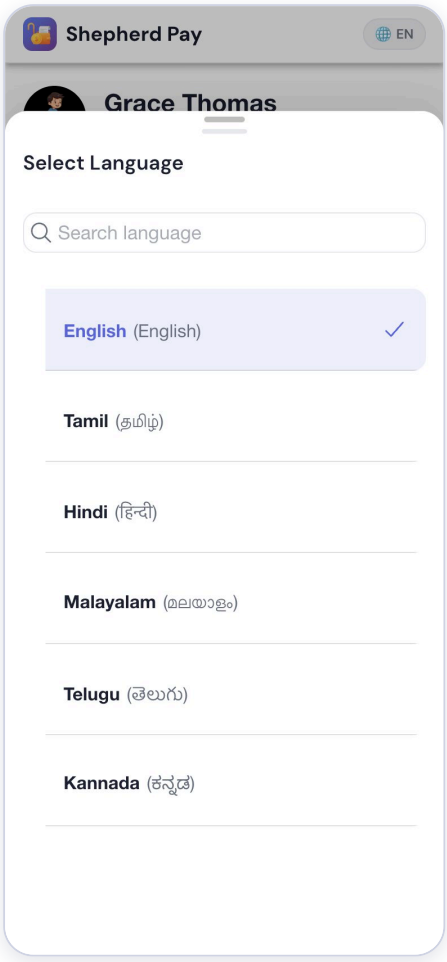
> **Tip:** Members without a church see **Join a Church**. Treasurers can tap **Create a Church**.

1 GETTING STARTED

Select Language

Everyone

Use the app in English, Tamil, Hindi, Malayalam, Telugu or Kannada.



HOW TO USE IT

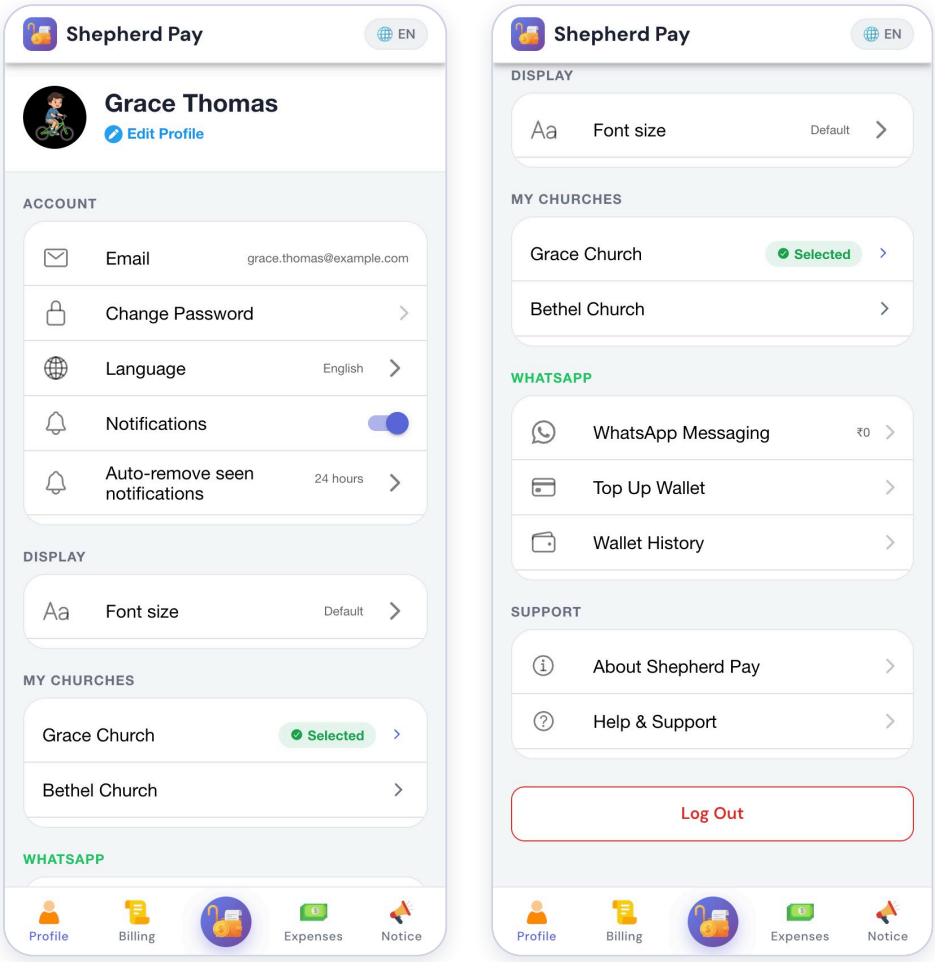
1. Open **Profile** from the bottom bar.
2. Tap **Language**.
3. Pick your language. The whole app changes at once.

1 GETTING STARTED

Profile

Everyone

Your account, language, notifications, font size, WhatsApp wallet and churches.



HOW TO USE IT

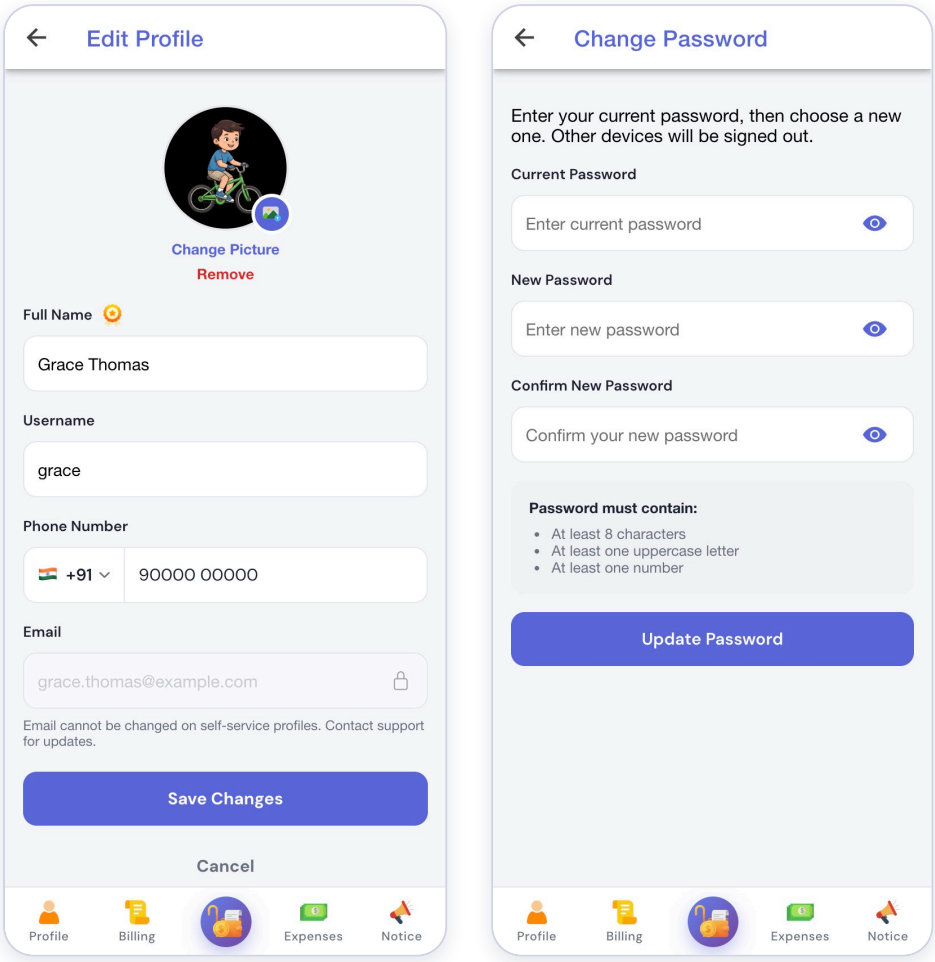
1. Tap **Edit Profile** to change your name, photo or phone.
2. Turn **Notifications** on or off, and choose a bigger **Font size** if you need it.
3. Under My Churches, tap a church to switch to it.
4. Tap **Log Out** to sign out.

1 GETTING STARTED

Edit Profile

Everyone

Update your details and keep your account safe.



HOW TO USE IT

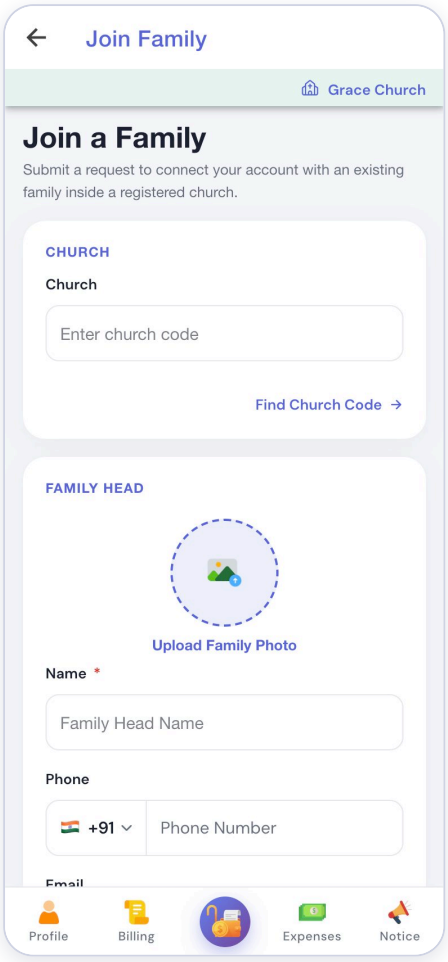
1. In **Edit Profile**, change your name, username, phone or picture, then tap **Save Changes**.
2. To change your password, open **Change Password**, enter the current password and the new one twice.
3. Tap **Update Password**. Other devices will be signed out.

2 YOUR CHURCH

Join a Family

Everyone

Members join their church by sending a request with the church code.



HOW TO USE IT

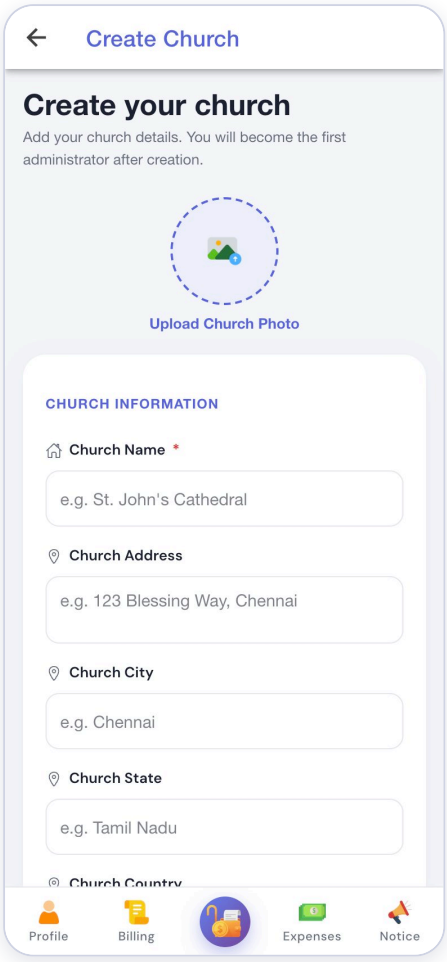
1. On the Dashboard, tap **Join a Church**.
2. Enter the church code. Tap **Find Church Code** if you do not know it.
3. Fill in the family head and tap **Add Member** for each family member.
4. Tap **Send Join Request**. An admin approves it from the Inbox.

2 YOUR CHURCH

Create Church

Everyone

A treasurer or pastor creates the church. The creator becomes the Super Admin.



HOW TO USE IT

1. On the Dashboard, tap **Create a Church**.
2. Add a church photo, name, address and contact details.
3. Tap **Create Church**. You can now add families and admins.

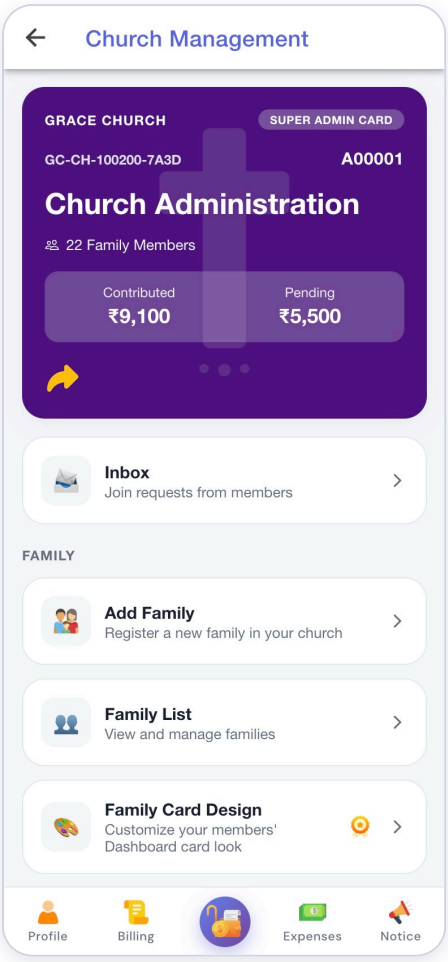
> **Tip:** Your first church is free.

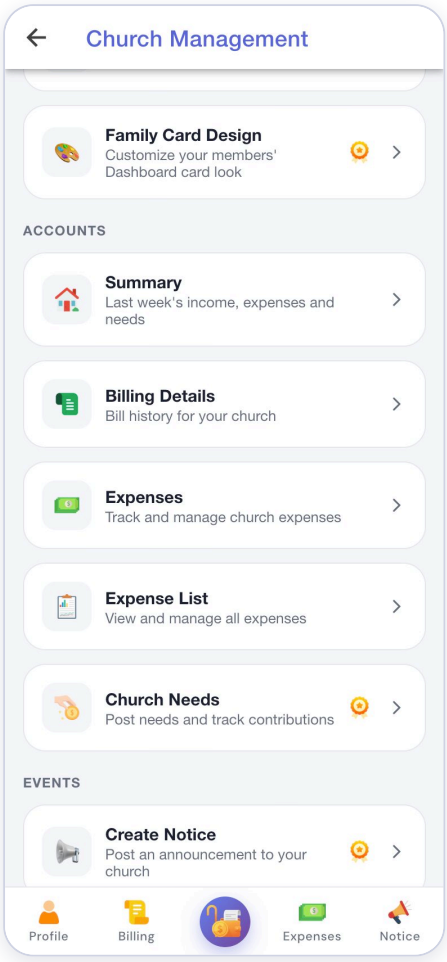
2 YOUR CHURCH

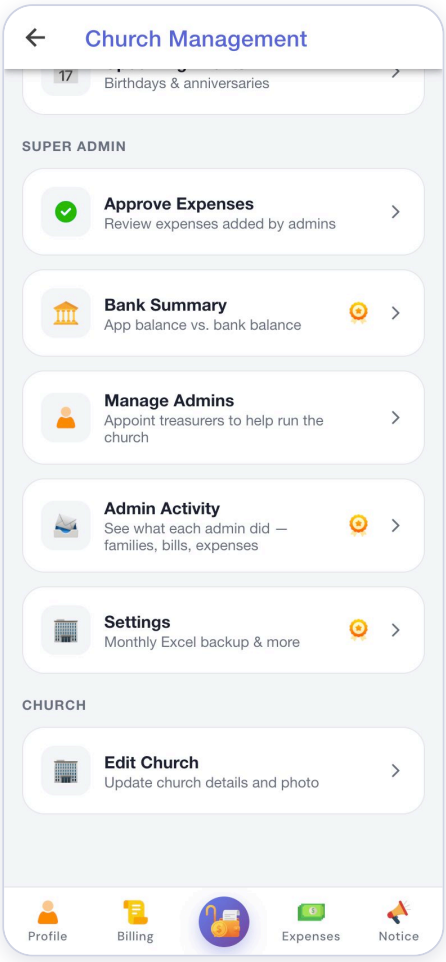
Church Management

Admins & Super Admin

All church tools in one place, grouped as Family, Accounts, Events, Super Admin and Church.







HOW TO USE IT

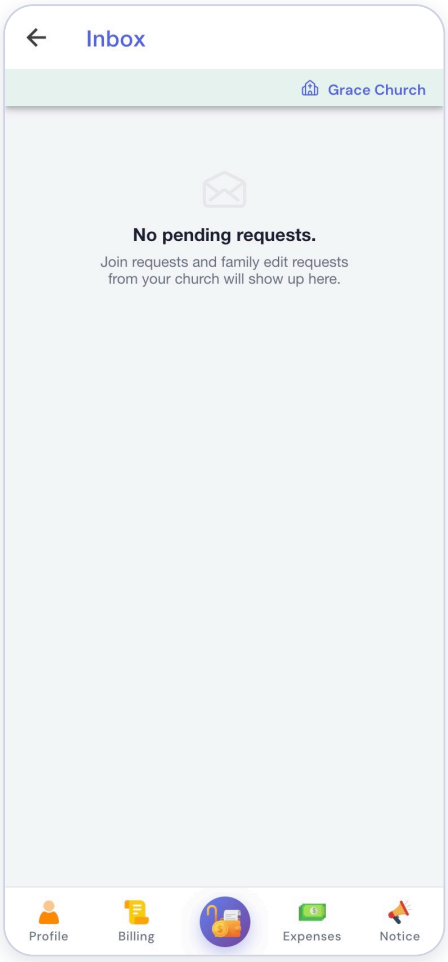
1. From the Dashboard, tap **Manage Church**.
2. Tap any tile to open that tool.
3. A crown badge marks a Premium feature.
4. The Super Admin group is only shown to the Super Admin.

2 YOUR CHURCH

Inbox

Admins & Super Admin

Join requests and family edit requests from members arrive here.



HOW TO USE IT

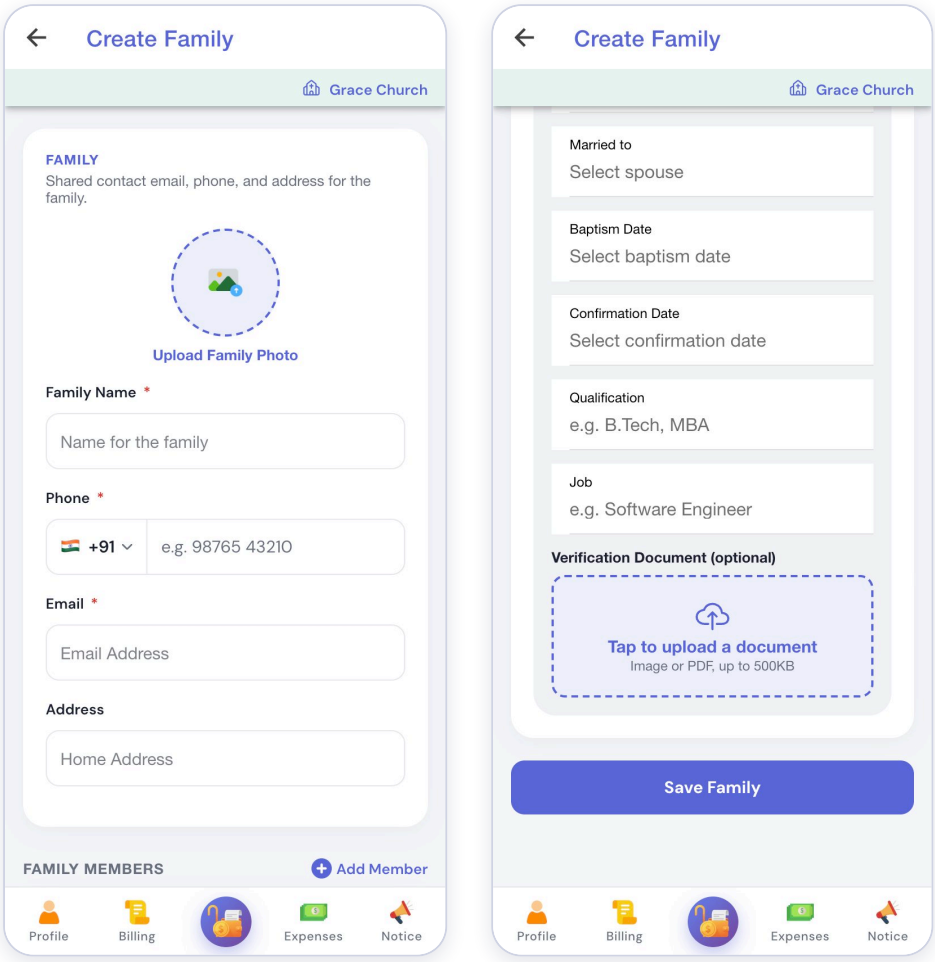
1. Open **Inbox** from Church Management.
2. Check the details in each request.
3. Tap **Approve** to add the family, or **Decline** to refuse.

3 FAMILIES

Create Family

Admins & Super Admin

Register a new family in your church.



HOW TO USE IT

1. In Church Management, tap **Add Family**.
2. Add a family photo, **Family Name**, phone, email and address.
3. Tap **Add Member** to add each member with relation, birthday and wedding day.
4. Tap **Save Family**. The family gets an ID such as F0001.

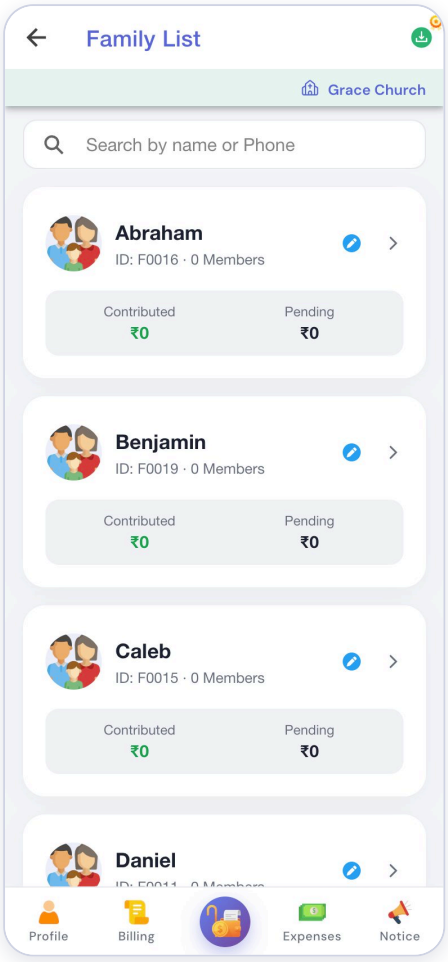
> **Tip:** Birthdays and wedding days appear in Upcoming Celebrations.

3 FAMILIES

Family List

Admins & Super Admin

All families with their Contributed and Pending totals.



HOW TO USE IT

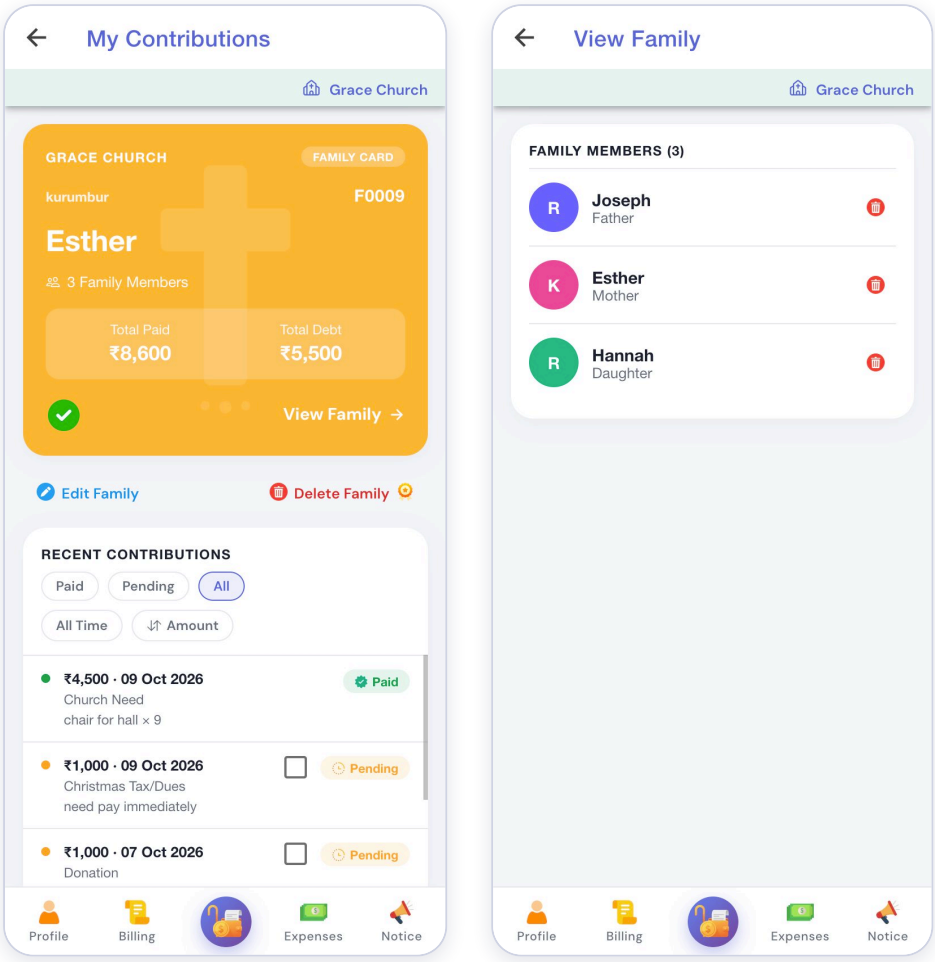
1. Open **Family List**.
2. Search by name or phone.
3. Tap a family to see its contributions. Tap the pencil to edit it.

3 FAMILIES

View Family

Admins & Super Admin

One family's card, payment history and members.



HOW TO USE IT

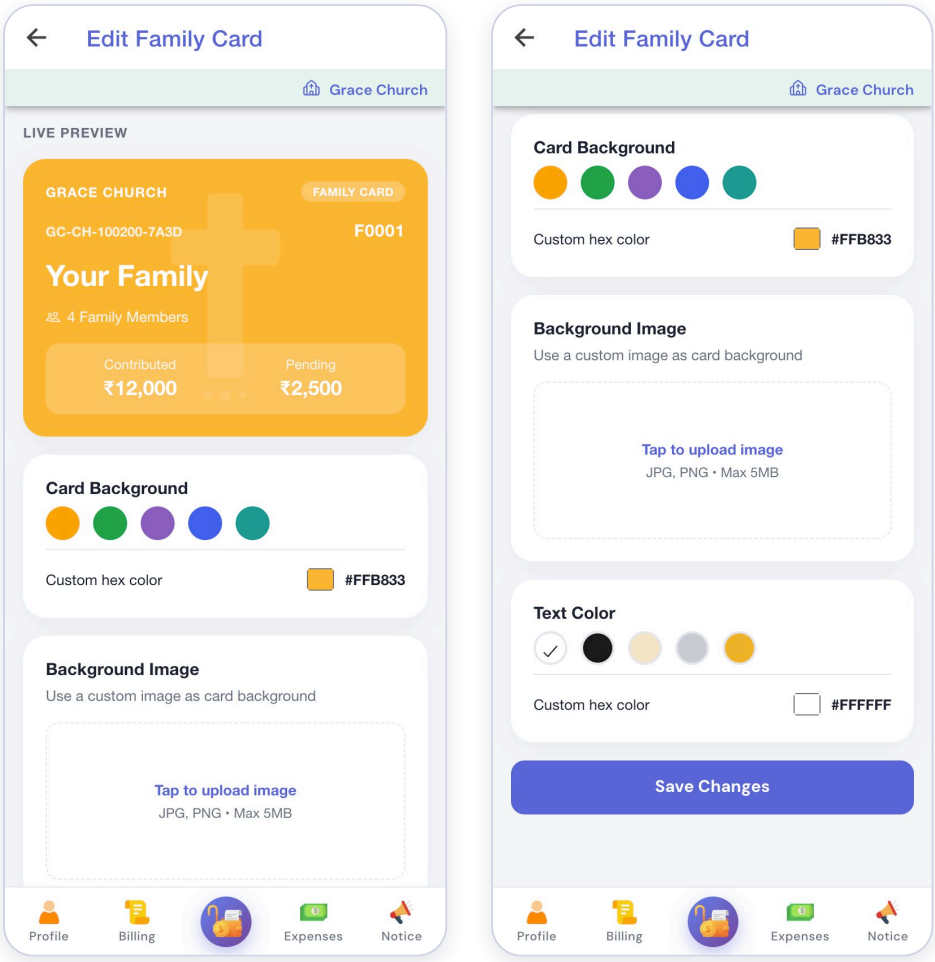
1. See Total Paid and Total Debt on the family card.
2. Filter Recent Contributions by Paid or Pending and by date.
3. Tap **View Family** to see the members, or **Edit Family** to change details.

3 FAMILIES

Family Card Design

Admins & Super Admin ★ Premium

Change how the family card looks on members' Dashboards.



HOW TO USE IT

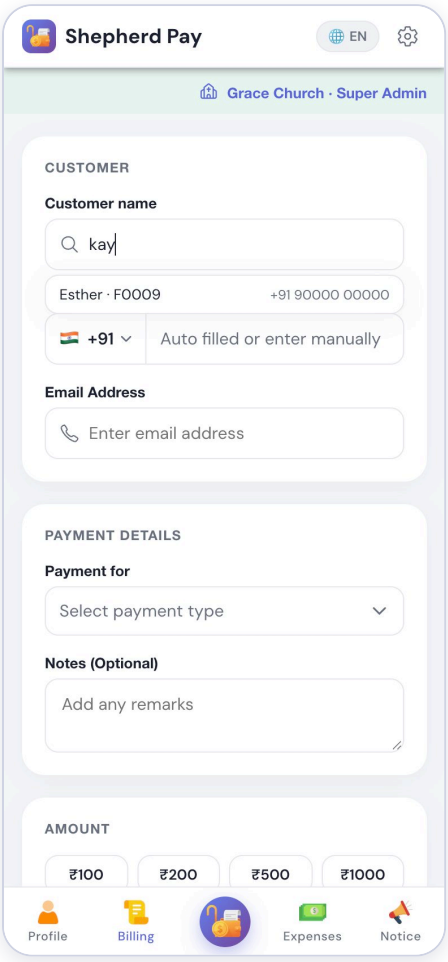
1. Open **Family Card Design**.
2. Pick a **Card Background** colour or upload a **Background Image**.
3. Pick a **Text Color** and check the live preview.
4. Tap **Save Changes**.

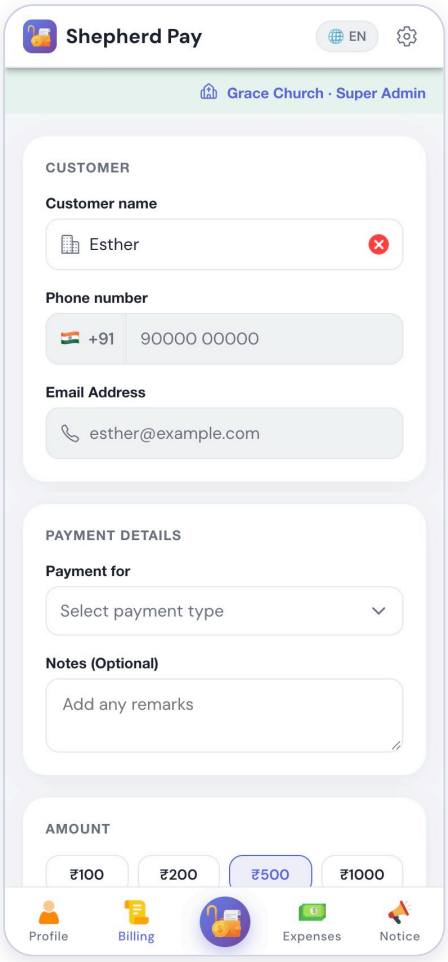
4 BILLING & PAYMENTS

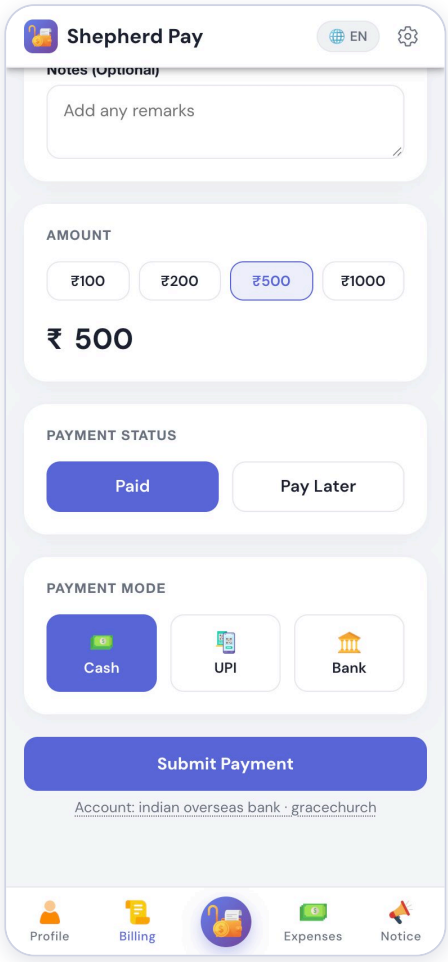
Billing

Admins & Super Admin

Take a payment and create a bill in a few taps.







HOW TO USE IT

1. Tap **Billing** in the bottom bar.
2. Type the family name in **Customer name** and pick the family from the list. Phone and email fill in by themselves.
3. Choose **Payment for** and pick or type the amount.
4. Choose **Paid** or **Pay Later**, then **Cash**, **UPI** or **Bank**.
5. Tap **Submit Payment**. The bill can be printed or shared on WhatsApp.

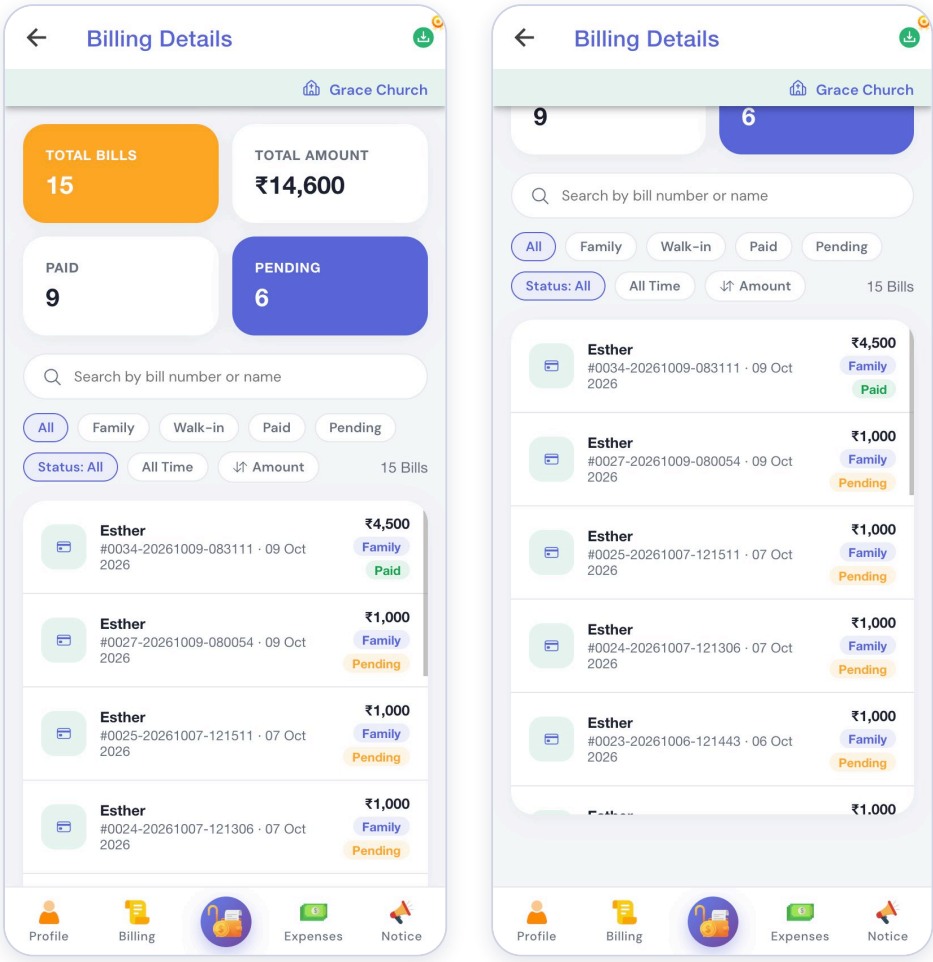
> **Tip:** For a walk-in visitor, just type the name. No family is needed.

4 BILLING & PAYMENTS

Billing Details

Admins & Super Admin

The full bill history of your church.



HOW TO USE IT

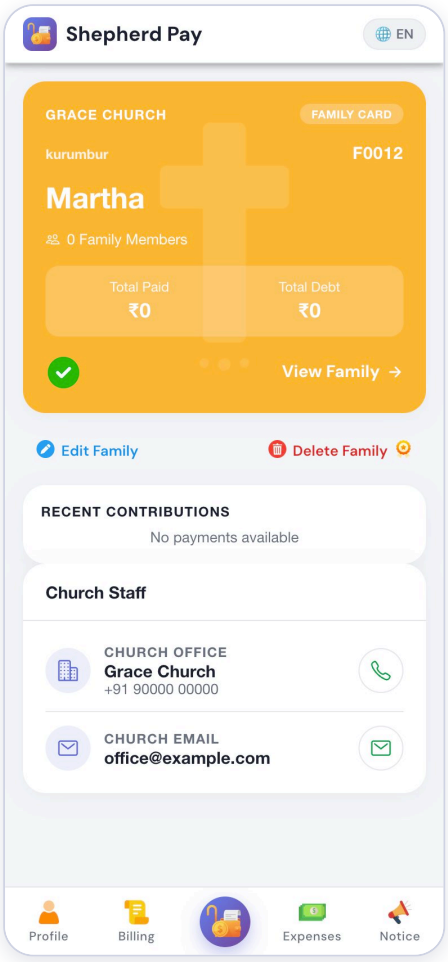
1. Open **Billing Details**.
2. See total bills, total amount, paid and pending at the top.
3. Search by bill number or name, and filter by Family, Walk-in, Paid, Pending or date.
4. Use the download button to export to Excel (Premium).

4 BILLING & PAYMENTS

My Contributions

Everyone

Members see their own family card and every payment they made.



HOW TO USE IT

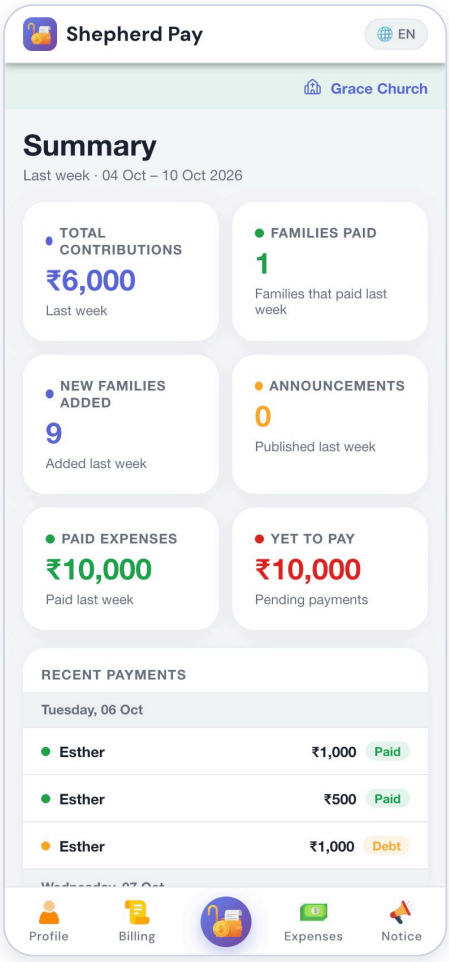
1. Tap **Contribution** in the bottom bar.
2. Check Total Paid and Total Debt.
3. Contact your church office from the buttons at the bottom.

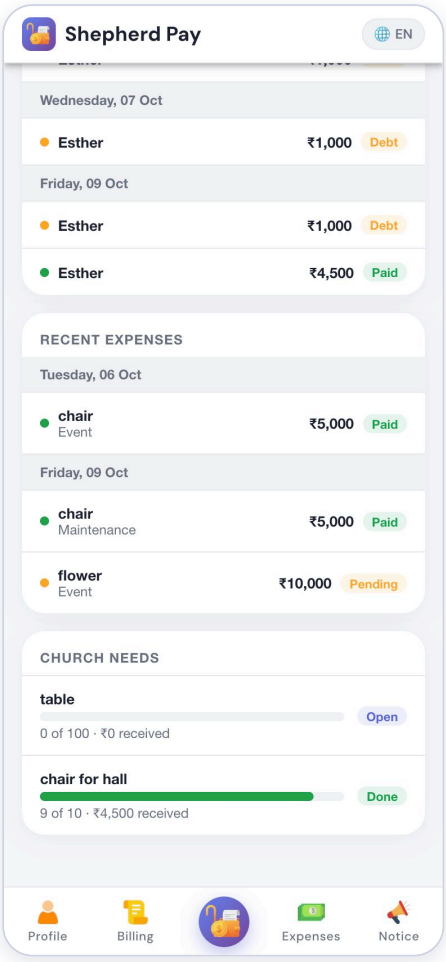
5 ACCOUNTS & EXPENSES

Summary

Everyone

Last week at a glance: contributions, families paid, new families, expenses and church needs.





HOW TO USE IT

1. Members: tap **Summary** in the bottom bar. Admins: open **Summary** in Church Management.
2. See the totals at the top.
3. Scroll down for recent payments, expenses and church needs.

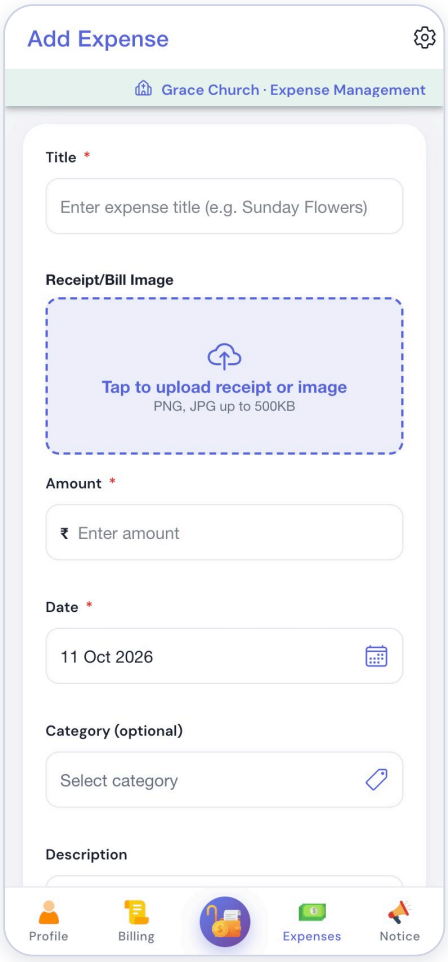
> **Tip:** Expenses and needs show here only if the **Show Expenses on Summary** and **Show on Summary** switches are on.

5 ACCOUNTS & EXPENSES

Add Expense

Admins & Super Admin

Record money the church spends.



HOW TO USE IT

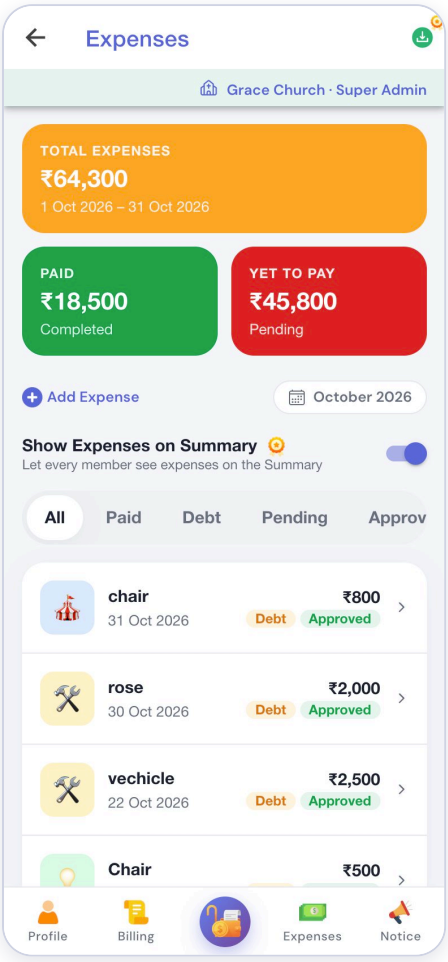
1. Tap **Expenses** in the bottom bar. The **Add Expense** form opens.
2. Enter the title, amount and date. Add a receipt photo if you have one.
3. Choose a category and **Paid** or **Debt**.
4. Tap **Submit Expense**. Expenses added by an admin wait for Super Admin approval.

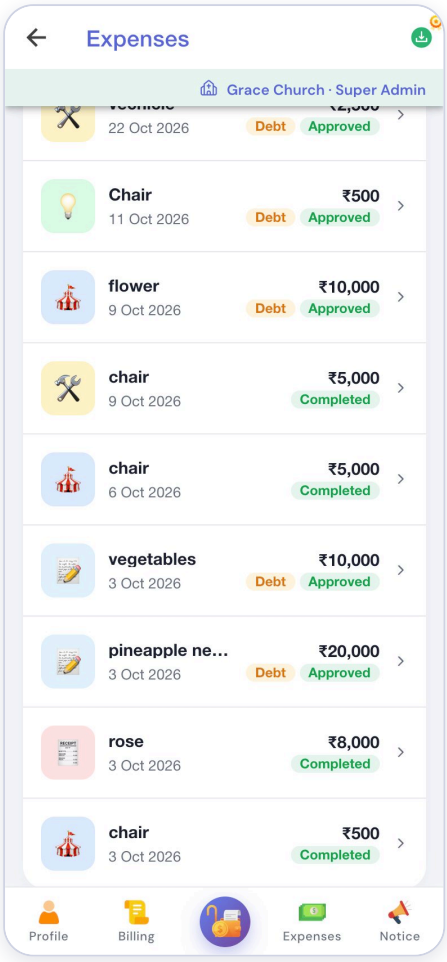
5 ACCOUNTS & EXPENSES

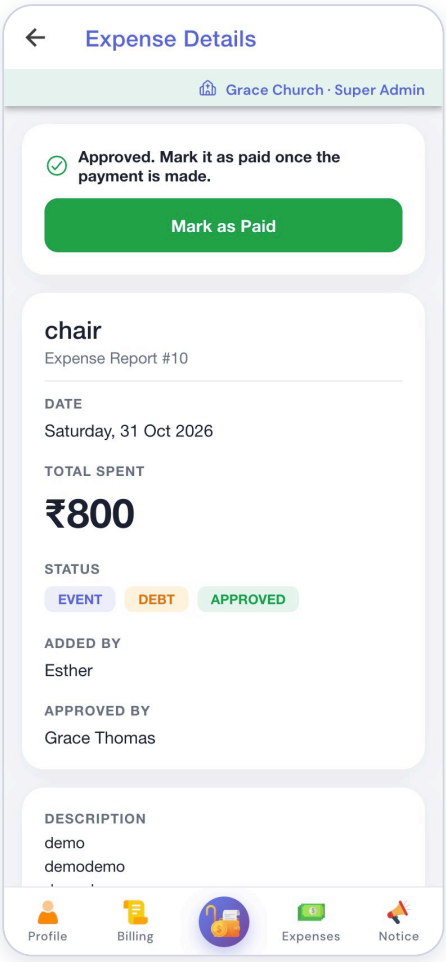
Expenses

Admins & Super Admin

All expenses with totals for the month.







HOW TO USE IT

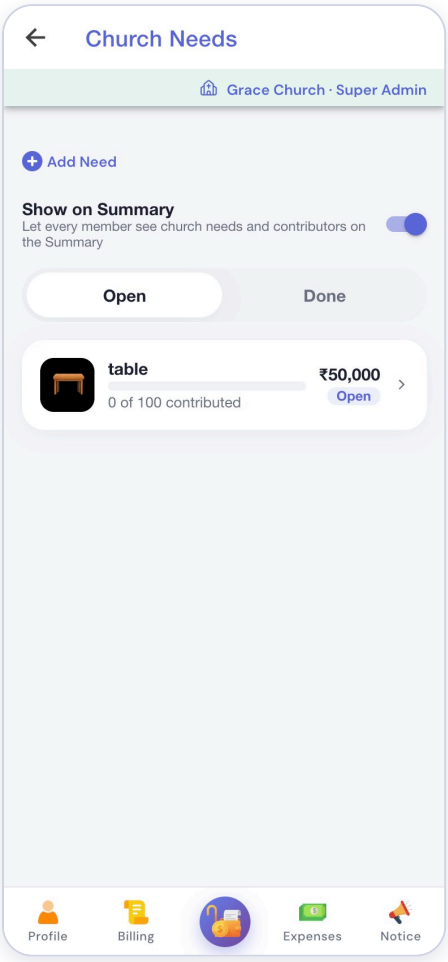
1. See Total Expenses, Paid and Yet to Pay at the top.
2. Filter by All, Paid, Debt, Pending or Approved, and change the month.
3. Tap an expense to see details. Tap **Mark as Paid** once it is paid.

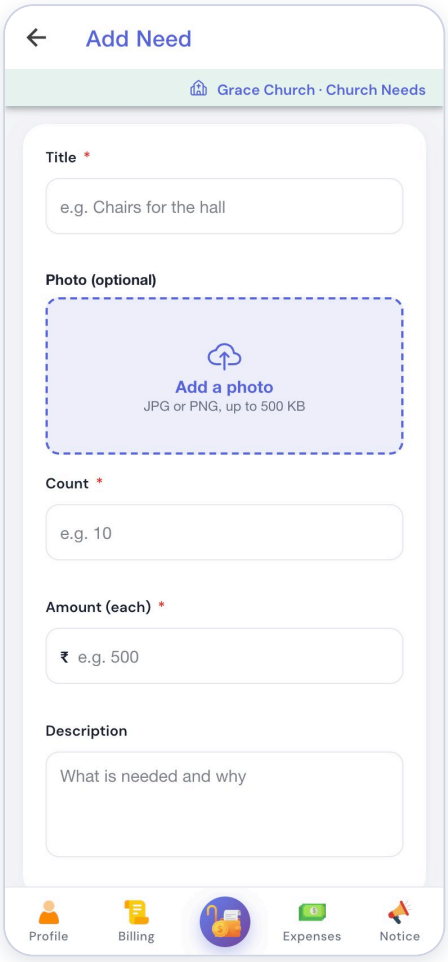
5 ACCOUNTS & EXPENSES

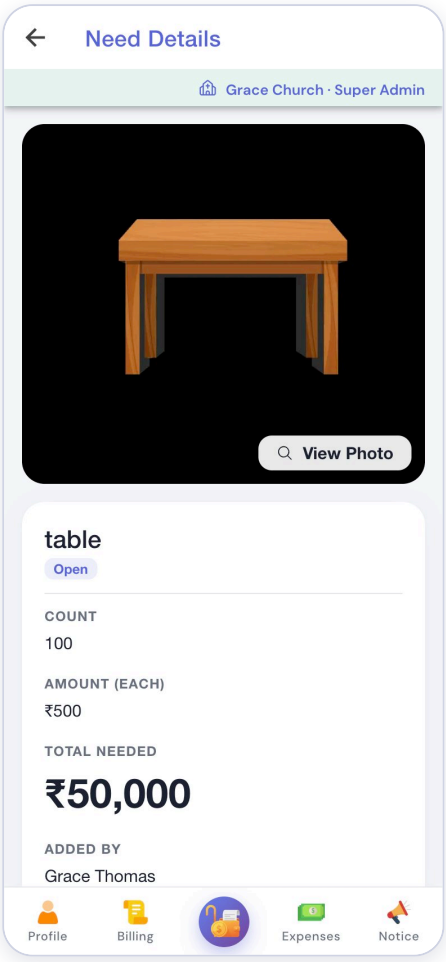
Church Needs

Admins & Super Admin ★ Premium

Post what the church needs (for example chairs) and track who contributes.







HOW TO USE IT

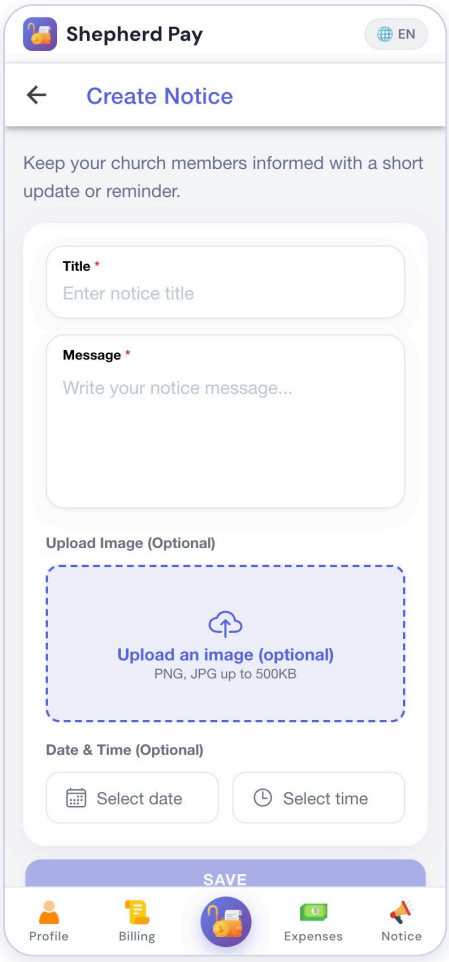
1. Open **Church Needs** and tap **Add Need**.
2. Enter the title, count, amount for each, a photo and a description.
3. Open a need and tap **Add Contribution** when a family gives.
4. Tap **Done** when the need is complete.

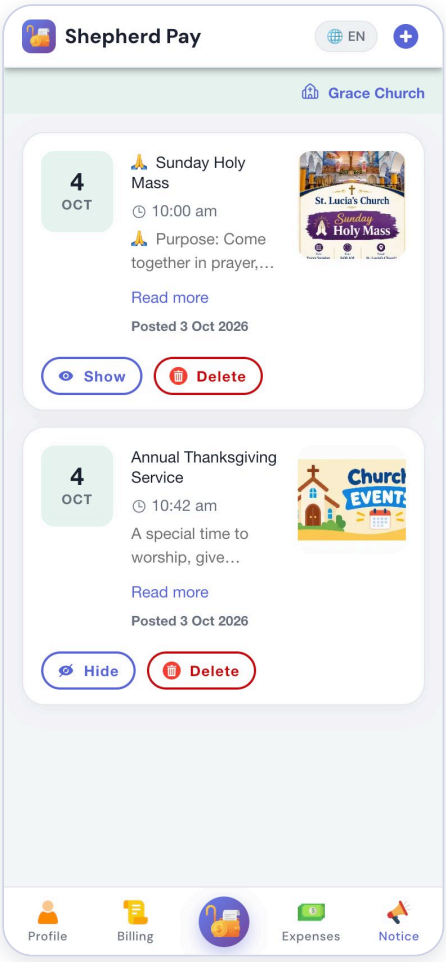
6 NOTICES & CELEBRATIONS

Create Notice

Admins & Super Admin ★ Premium

Post an announcement such as a service time or event.





HOW TO USE IT

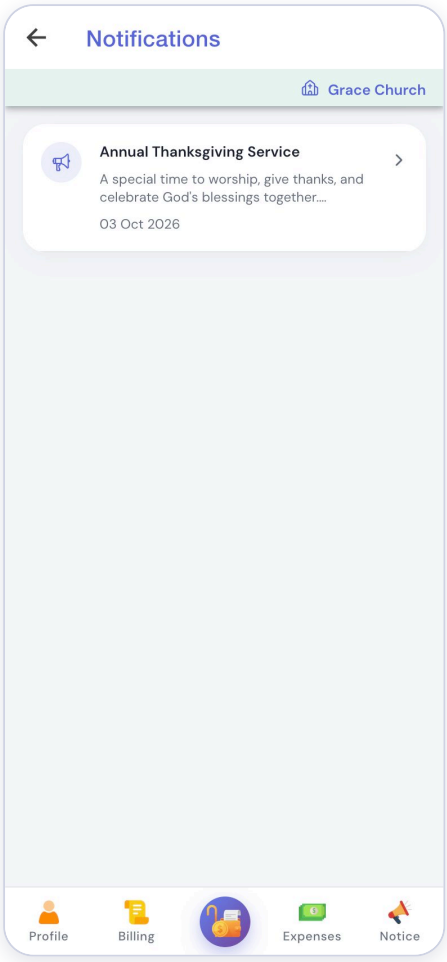
1. In Church Management, tap **Create Notice**.
2. Enter a title and message. Add an image, date and time if you want.
3. Tap **Save**. Members see it under **Notice**.
4. Use **Hide** or **Delete** to manage notices.

6 NOTICES & CELEBRATIONS

Notifications

Everyone

All alerts in one list: notices, bills and reminders.



HOW TO USE IT

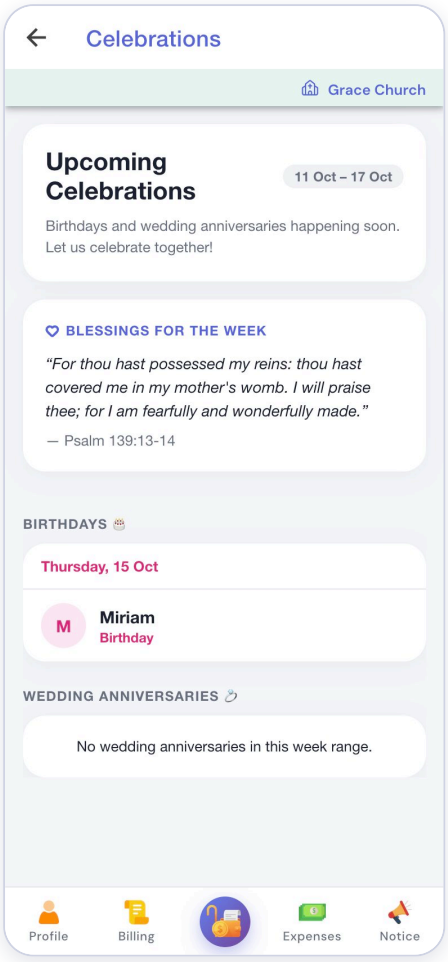
1. Tap the bell on the Dashboard.
2. Tap a notification to open it.
3. Seen notifications are removed automatically after the time set in Profile.

6 NOTICES & CELEBRATIONS

Upcoming Celebrations

Everyone

Birthdays and wedding anniversaries in the church this week.



HOW TO USE IT

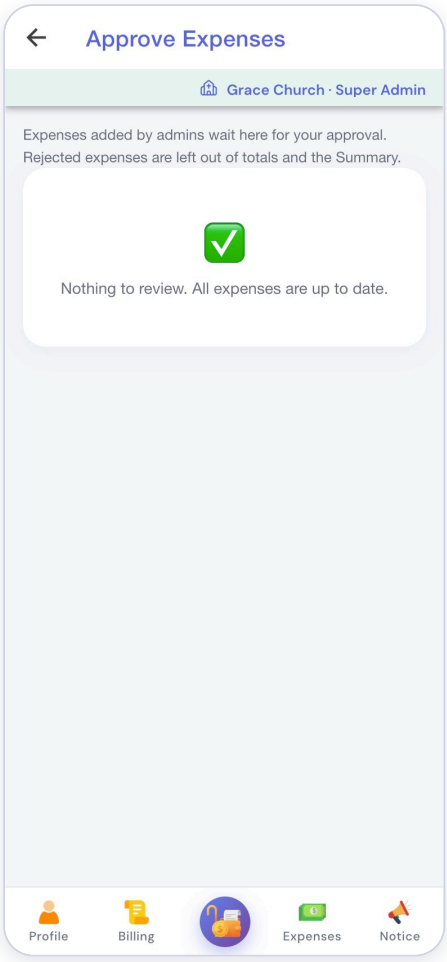
1. Tap **See all** next to Upcoming Celebrations on the Dashboard.
2. See this week's birthdays and anniversaries with a Bible verse.
3. Wish them in person or on WhatsApp.

7 SUPER ADMIN CONTROLS

Approve Expenses

Super Admin only

Expenses added by admins wait here for the Super Admin.



HOW TO USE IT

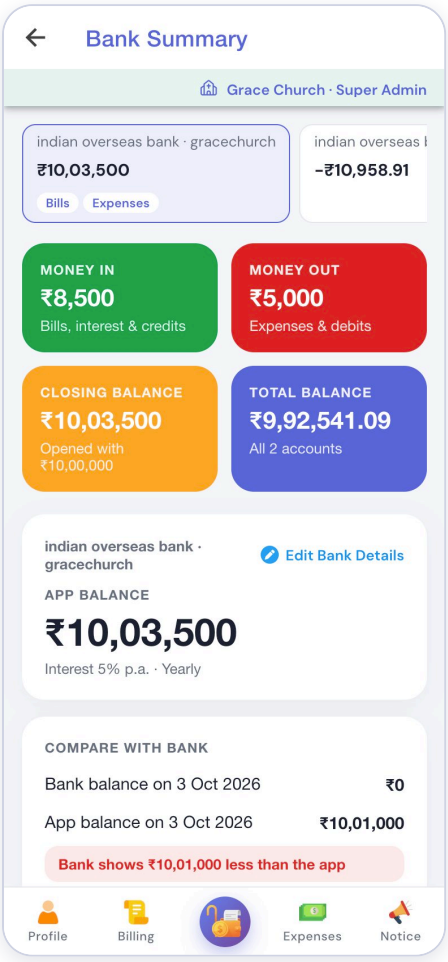
1. In Church Management, open **Approve Expenses**. A red number shows how many are waiting.
2. Check the amount, date and receipt.
3. Tap **Approve** or **Reject**. Rejected expenses are left out of all totals.

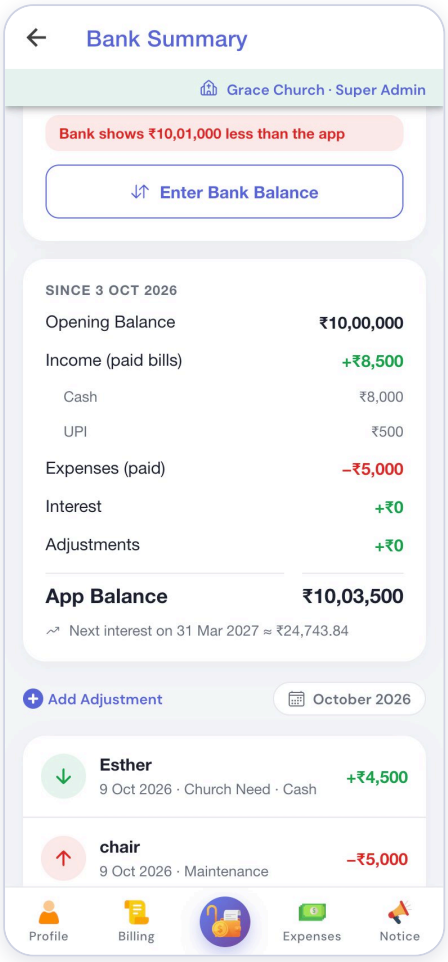
7 SUPER ADMIN CONTROLS

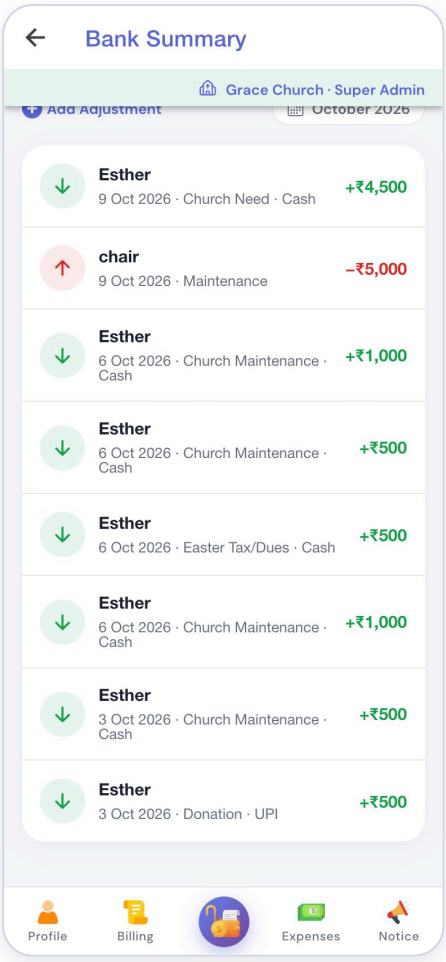
Bank Summary

Super Admin only ★ Premium

Compare the balance in the app with your real bank balance.







HOW TO USE IT

1. In Church Management, open **Bank Summary**.
2. See Money In, Money Out, Closing Balance and Total Balance of all accounts.
3. Tap **Enter Bank Balance** and type the balance from your passbook. The app shows any difference.
4. Use **Add Adjustment** for interest or bank charges, **Add Account** for another account, and **Edit Bank Details** to set the opening balance and interest rate.

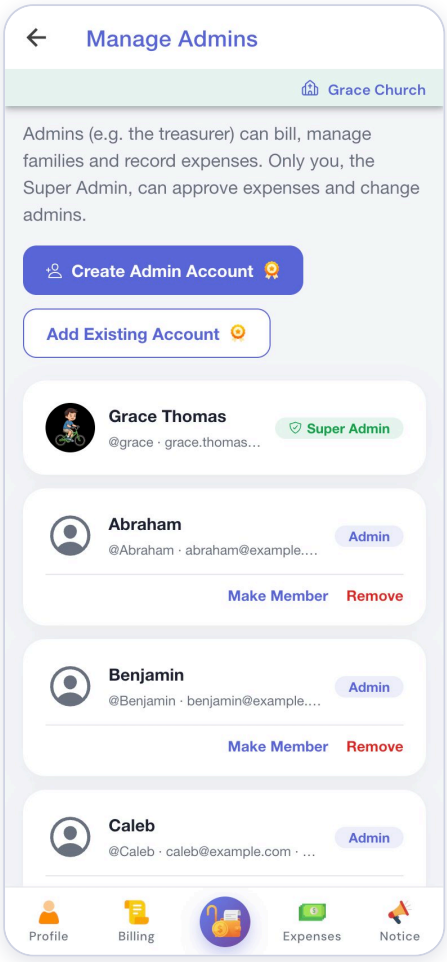
> **Tip:** Every bill and expense is listed month by month below, so you can match it with the bank statement.

7 SUPER ADMIN CONTROLS

Manage Admins

Super Admin only

Appoint helpers such as the treasurer.



HOW TO USE IT

1. In Church Management, open **Manage Admins**.
2. Tap **Create Admin Account** to make a new login, or **Add Existing Account** for someone who already has an account.
3. Tap **Make Member** to turn an admin back into a member, or **Remove** to remove them.

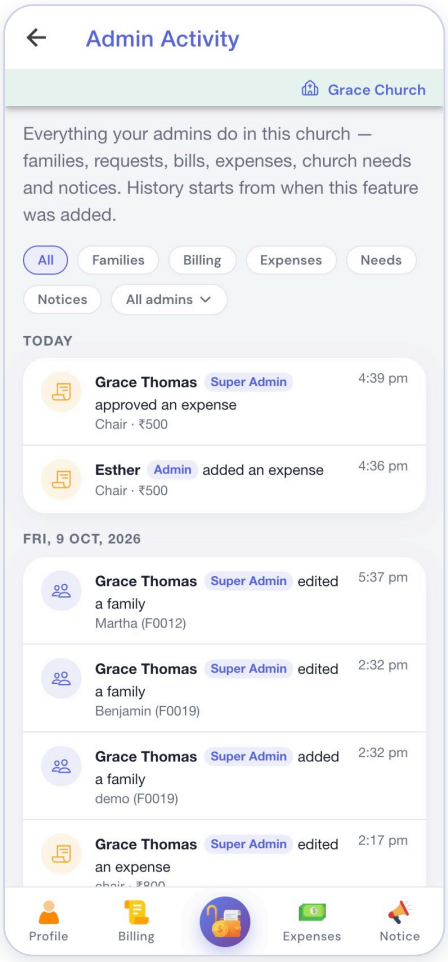
> **Tip:** Only the Super Admin can approve expenses and change admins.

7 SUPER ADMIN CONTROLS

Admin Activity

Super Admin only ★ Premium

See everything each admin did: families, bills, expenses, needs and notices.



HOW TO USE IT

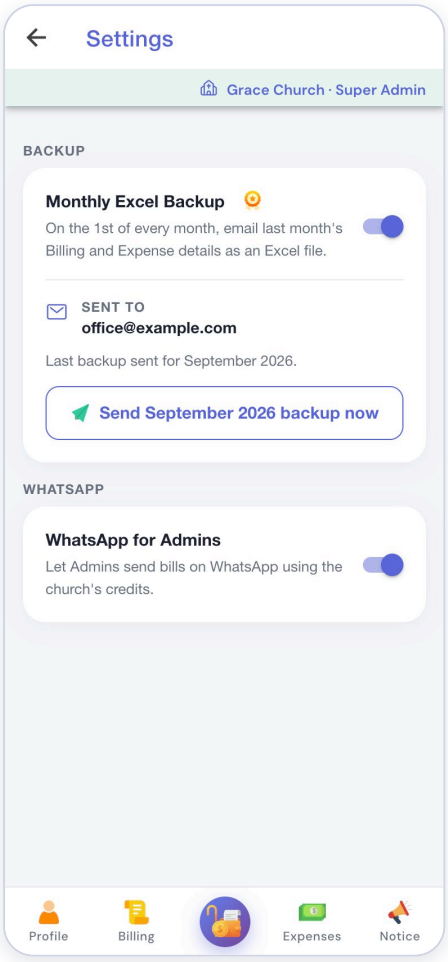
1. In Church Management, open **Admin Activity**.
2. Filter by type (Families, Billing, Expenses, Needs, Notices).
3. Use **All admins** to see one admin only.

7 SUPER ADMIN CONTROLS

Settings

Super Admin only ★ Premium

Monthly backup and WhatsApp options for the church.



HOW TO USE IT

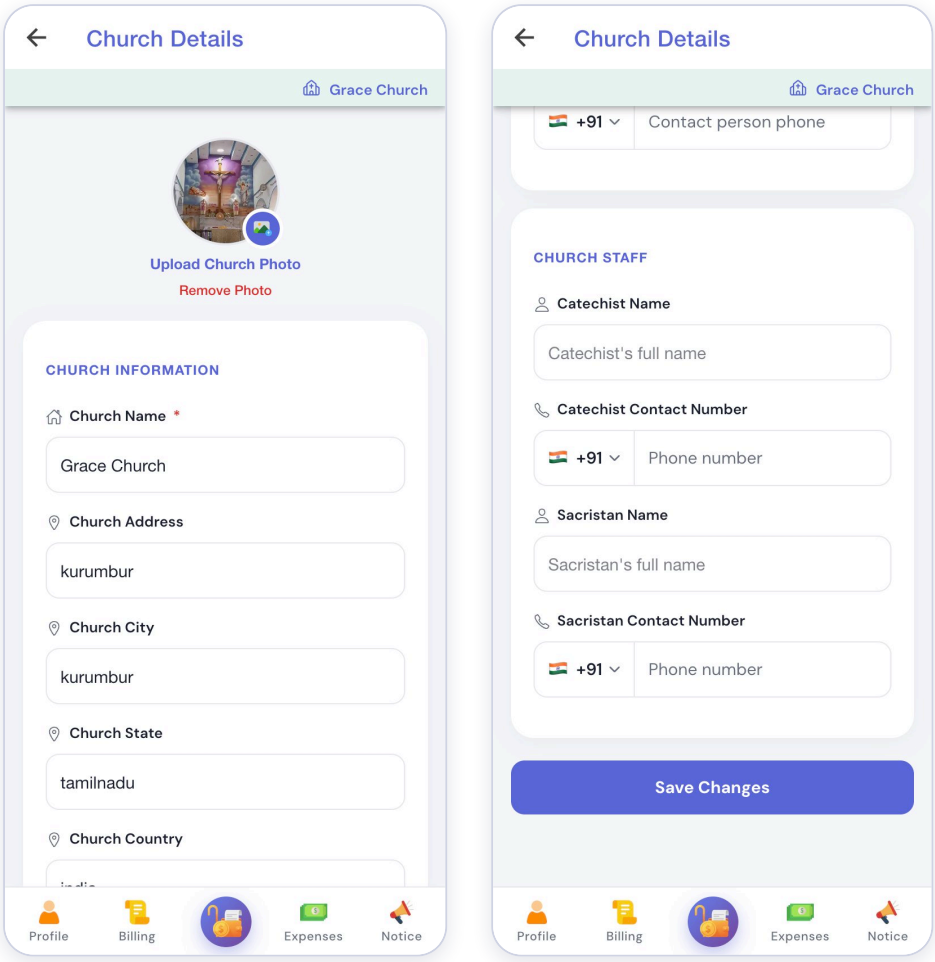
1. In Church Management, open **Settings**.
2. Turn on **Monthly Excel Backup**. On the 1st of each month, last month's bills and expenses are emailed as an Excel file.
3. Turn on **WhatsApp for Admins** to let admins send bills on WhatsApp using the church's credits.

7 SUPER ADMIN CONTROLS

Edit Church

Super Admin only

Update the church name, photo, address and staff.



HOW TO USE IT

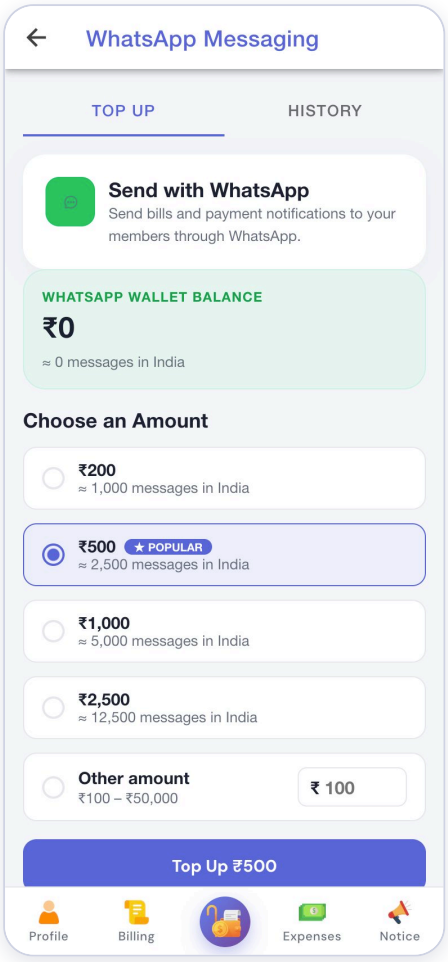
1. In Church Management, open **Edit Church**.
2. Change the photo, name, address and contacts.
3. Add the catechist and sacristan names and numbers.
4. Tap **Save Changes**.

8 MORE

WhatsApp Messaging

Admins & Super Admin

Send bills and payment messages to members on WhatsApp.



HOW TO USE IT

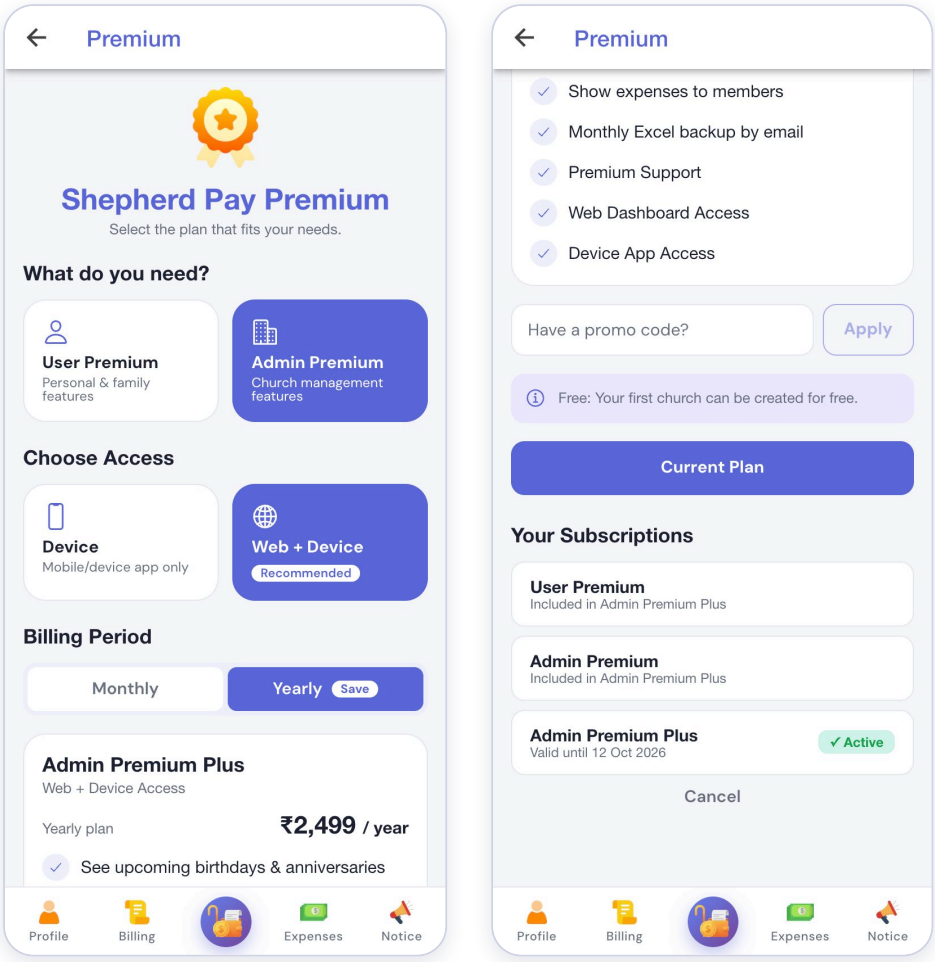
1. Open **WhatsApp Messaging** from Profile.
2. Choose an amount to top up the wallet.
3. Pay to add credits. See past top-ups under History.

8 MORE

Premium

Everyone

Unlock Bank Summary, Admin Activity, Church Needs, notices, backups and more.



HOW TO USE IT

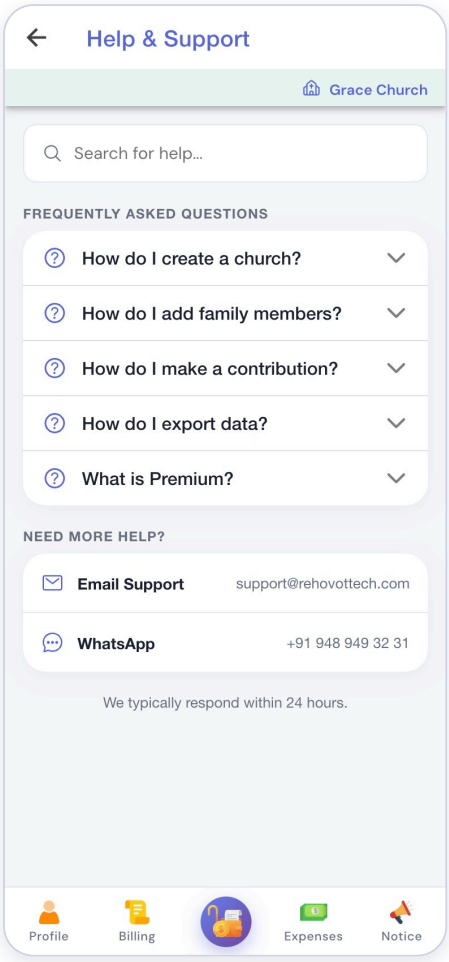
1. Open **Premium** from the Dashboard or Profile.
2. Pick User Premium or Admin Premium, Device or Web + Device, and Monthly or Yearly.
3. Have a promo code? Enter it and tap **Apply**.

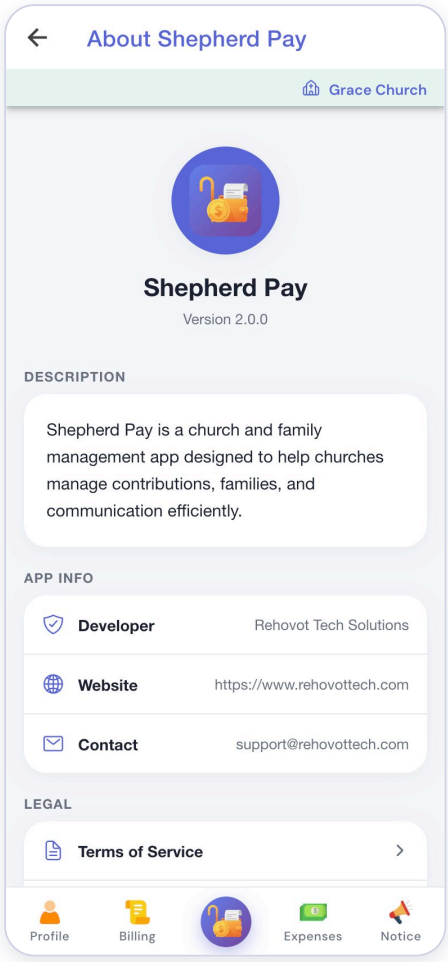
8 MORE

Help & Support

Everyone

Answers to common questions and ways to reach us.





HOW TO USE IT

1. Open **Help & Support** from Profile.
2. Tap a question to read the answer.
3. Still need help? Email or WhatsApp our support team.