USER MANUAL

ACE Manager.

The AI-powered command layer for your organisation — members, departments, rotas, giving, events, and communication in one place.

Run every team.

Web
9 sections
ace-presenter.app

Contents

00	ACE Manager — User Manual	.3
01	1 · Getting Started	.7
02	2 · People — Members & Staff	.12
03	3 · Departments, Teams & Small Groups	.17
04	4 · Events, Attendance & Check-in	.21
05	5 · Volunteer Rotas & Serving	.25
06	6 · Giving & Donations	.29
07	7 · Communication, Campaigns & Care	.33
08	8 · The AI Agent	.38
09	9 · Reports, Analytics, Integrations & the Portal	.43

OVERVIEW

ACE Manager — User Manual

A comprehensive reference for ACE Manager, the AI-powered organisation and church management platform in the ACE Suite. Keep your whole congregation o...

ACE Manager — User Manual

A comprehensive reference for **ACE Manager**, the AI-powered organisation and church management platform in the ACE Suite. Keep your whole congregation or team in one directory, coordinate departments and volunteer rotas, run events and check-in, track giving, reach every member on their own channel, and let an AI operations agent handle the routine follow-up in the background.

> **What ACE Manager is — and where it is in its life.** ACE Manager is the organisational command layer of the ACE Suite. It is a **web application**: you run it in any modern browser, on a laptop or a phone, at your organisation's ACE Manager address. There is no separate app to install.
>
> - **Web app** — the full product, on any device with a browser. This is the only place the dashboard lives today.
> - **Member portal** — a lightweight, mobile-first self-service area your members reach through a personal link, with no account or password to remember. See The Member Self-Service Portal.
> - **One ACE account** — the same login works across the ACE Suite, so ACE Manager, ACE Presenter, and ACE Schedule share one sign-in and one bill.
>
> **ACE Manager is in early access (late beta).** The core is in daily use, but the product is still moving quickly, and it is in the middle of a platform migration from its original database to a new one. A few modules are newer than others, and a few advertised integrations are still being wired up. This manual is honest about which is which — every module carries a status badge, and anything not yet fully live is marked. **Native mobile apps (iOS / Android) are not available yet**; the member portal is built to work well on a phone browser in the meantime.

How to read this manual

Where things live. ACE Manager has two main surfaces:

- **The Dashboard** (`/dashboard`) — the staff workspace, where admins, managers, and department leaders run the organisation. Menu paths use ‣ (for example, Dashboard ‣ Giving ‣ Funds).
- **The Portal** (`/portal/…`) — the member-facing self-service area, opened from a personal link.

Who sees what. ACE Manager is role-based. Three staff roles — **Admin**, **Manager**, and **Staff** (department leaders) — see different slices of the dashboard, and members see only their own portal. Where a feature is limited to certain roles, it is called out inline. The full picture is in Getting Started ‣ Roles & access.

Status badges. Not every module is at the same level of maturity in early access. Availability is flagged inline:

BADGE	MEANING
(available)	Working now in early access

BADGE	MEANING
early access	Present and usable, but newer and still maturing — expect refinements
(setup required)	Ships in the app, but only works once an administrator has configured the backend service behind it (messaging providers, payment keys, integrations)
(rolling out)	Being switched on progressively; may not yet be visible on every account
planned	On the roadmap; not available today

Honesty about the AI. ACE Manager's agent is a real, shipping part of the product, but it depends on a hosted AI service and on your messaging providers being connected. On a fully configured account it drafts messages, answers members, and runs scheduled background jobs end-to-end. Where it is not configured, the interface is still present and the app degrades gracefully — you simply do the work manually. This manual always says which is which, and The AI Agent documents every guardrail.

What ACE Manager does, at a glance

- **People** — a single directory of your congregation or membership, plus an internal staff directory, with profiles, engagement, and self-registration. See People.
- **Departments, teams & small groups** — ministry structure for staff, and small groups for members. See Departments, Teams & Small Groups.
- **Events, attendance & check-in** — plan events, take registrations and payment, record service attendance, and run secure children's check-in. See Events, Attendance & Check-in.
- **Volunteer rotas** — schedule volunteers across ministry teams, with unavailability, accept/decline, and swaps. See Volunteer Rotas & Serving.
- **Giving & donations** — funds, donations, pledges, recurring giving, and contribution statements. See Giving & Donations.
- **Communication & campaigns** — reach members over WhatsApp, SMS, email, Telegram, and Instagram, with templates, campaigns, prayer requests, and visitor follow-up. See Communication, Campaigns & Care.
- **The AI agent** — an operations assistant that assigns tasks, sends reminders, answers members, and generates reports — within guardrails you set. See The AI Agent.
- **Reports, analytics, integrations & the portal** — weekly digests, trends, connected tools, and member self-service. See Reports, Analytics, Integrations & the Portal.

Who ACE Manager is for

ACE Manager was built **for churches and ministries first** — congregation records, service planning, volunteer coordination, pastoral follow-up, giving, and multi-department reporting are its centre of gravity, and the vocabulary throughout (members, departments, services, pastoral care) reflects that. It also serves **ministry teams** (worship, youth, media, outreach, admin) and, more broadly, **any**

organisation or team that coordinates people, events, communication, and tasks at scale — nonprofits, schools, and production companies included. Where a term is church-specific, read it as your organisation's equivalent.

Table of contents

1. Getting Started — sign-up, organisation onboarding, the trial, seeding departments, roles & access, the dashboard, plans
2. People — Members & Staff — the congregation directory, member profiles, self-registration, the internal staff directory
3. Departments, Teams & Small Groups — ministry departments, department-scoped access, small groups, group discovery
4. Events, Attendance & Check-in — event planning, registration & payment, service attendance, children's check-in, kiosk mode
5. Volunteer Rotas & Serving — building rotas, roles, unavailability, accept/decline, swaps, serving history
6. Giving & Donations — funds, recording donations, pledges & campaigns, recurring giving, statements, online giving
7. Communication, Campaigns & Care — channels, templates, campaigns, internal messaging, prayer requests, visitor follow-up
8. The AI Agent — what it does, its personality, modes, guardrails, approvals, the kill switch, background automations, natural-language questions
9. Reports, Analytics, Integrations & the Portal — reports & digests, analytics, integrations (Planning Center, Google, Zoom, Stripe), CCLI reporting, the member self-service portal

---

A note on plans

ACE Manager is offered on a base-plus-usage model: a plan includes a bundle of member records and team seats, and larger organisations add capacity on top. There is a **free tier** for small teams and a **14-day free trial** on the paid plans. The full breakdown — what each tier includes and how seats scale — is in Getting Started ‣ Plans & billing. Pricing and limits are still being finalised during early access and may change before general availability.

SECTION 01

1 · Getting Started

This chapter takes you from nothing to a working ACE Manager organisation: creating your account, onboarding your organisation, understanding the tria...

01 · 1 · Getting Started

This chapter takes you from nothing to a working ACE Manager organisation: creating your account, onboarding your organisation, understanding the trial, seeding your departments, learning who can see what, and finding your way around the dashboard.

> **ACE Manager is a web app.** There is nothing to install. Open your browser, go to your ACE Manager address, and sign in. It works on a laptop, a tablet, or a phone, though the staff dashboard is most comfortable on a larger screen. Native mobile apps are `planned`, not available today.

Creating your account and organisation

Every ACE Manager account belongs to **one organisation** (your church, ministry, or team). The person who signs up first becomes that organisation's **Admin**.

1. **Sign up.** From the sign-up page, enter your name, email, and a password. This creates your ACE account — the same login used across the ACE Suite.
2. **Your organisation is created.** ACE Manager creates a fresh, private organisation for you. All your data lives inside it and is never mixed with any other organisation's — this is a strict boundary, enforced at the database level.
3. **You land in onboarding.** A short guided wizard sets up the essentials before you reach the dashboard.

The onboarding wizard

Onboarding is a few quick steps and you can move backward and forward freely:

1. **Welcome** — a brief orientation to what you're about to set up.
2. **About your organisation** — give your organisation a name, pick an **organisation type** (Church, Ministry, Media/Creative, Nonprofit, or Other), and set your **timezone**. The type lightly tailors the vocabulary and defaults; the timezone is important because it drives when the AI agent works and when scheduled messages and digests go out.
3. **Set up departments** — choose which ministry departments or teams to create from a ready-made list (see Seeding departments below). You can accept the defaults, pick a subset, or skip and add them later.
4. **Finish** — you're taken to your dashboard.

You can **skip onboarding** and configure everything later from Dashboard ‣ Settings and Dashboard ‣ Departments — nothing here is permanent.

The free trial

The paid plans start with a **14-day free trial**, no charge until it ends, so you can seed your organisation, invite your team, and try the AI agent before committing. The **free tier** has no trial and no time limit — it is simply free, within its capacity limits. See Plans & billing.

Seeding departments

Rather than build your ministry structure from scratch, ACE Manager ships with a library of **ready-made departments** grouped into four categories. From onboarding — or later, using the **Seed defaults** button on Dashboard ‣ Departments — you can create any of them in one click:

- **Ministry** — Children's Ministry, Youth & Young Adults, Men's & Women's Ministries, Marriage & Family, Evangelism & Missions, Prayer / Intercessory Team, Pastoral Care / Counselling.
- **Worship & Arts** — Music & Worship, Media & Technical, Creative Arts / Drama.
- **Operations & Support** — Administration, Finance & Treasury, Ushering & Protocol, Hospitality / Greeters, Facility & Maintenance, Communications / Publicity.
- **Leadership** — Senior Pastor, Pastors / Administrator, Deacons, Board of Trustees.

Each comes with a name, description, icon, and colour, and you can rename, recolour, add, or remove departments freely. If you are not a church, treat these as a starting template and rework them into your own teams. Full detail is in Departments, Teams & Small Groups.

Roles & access

ACE Manager is **role-based**. There are three staff roles inside the dashboard, plus your members, who never touch the dashboard at all.

ROLE	WHO THEY ARE	WHAT THEY CAN DO
Admin	The organisation owner (and anyone they promote)	Everything. Full access to every dashboard page. Sole right to delete departments, manage billing and integrations, configure the AI agent, and approve agent actions.
Manager	Trusted leaders and administrators	Nearly everything: manage members, events, giving, rotas, campaigns, reports, and approve agent actions. Cannot delete departments or manage billing and integrations.
Staff (department leader)	The person who runs a ministry or team	A focused workspace scoped to **their department**: their members, tasks, calendar, messages, campaigns, templates, projects, and files. They do **not** see the organisation-wide Team directory, Departments admin, Integrations, the Agent log, Analytics, or Reports.
Member	Your congregation / audience	No dashboard access. Members interact only through the self-service **portal** and through messages on their preferred channel. See The Member Self-Service Portal.

Department scoping is the key idea for Staff. A department leader sees only their own department's congregation members and their own department's slice of the dashboard. Admins and managers see across every department. This keeps a youth leader focused on the youth ministry while the senior pastor sees the whole organisation.

Roles are assigned from the internal staff directory — see People ‣ The internal staff directory.

The dashboard at a glance

After sign-in, staff land on the **Dashboard** (`/dashboard`) — the organisation's operational home. Around a left-hand navigation sidebar (which collapses to a mobile nav on small screens), the main overview brings together:

- **Stat cards** — active tasks, team online, agent actions today, pending approvals, and events this week, each with a small trend sparkline.
- **Agent activity** — a live feed of what the AI agent has been doing (assignments, reminders, conflict detection).
- **Tasks** — your prioritised task list with assignees and status.
- **Team** — staff with online / offline indicators.
- **Congregation** — member count, opted-in count, average engagement, and recent members (scoped to your department if you're Staff).
- **Upcoming events** — the next events with location and online/offline badges.
- **Integrations** — connected platforms and their sync status.
- **The floating agent chat** — a button in the bottom-right that opens a conversation with the AI agent from anywhere in the dashboard.

> **Demo data on an empty organisation.** Before you've added your own data, panels show realistic placeholder content so you can see how everything fits together. As soon as you add real members, tasks, and events, your data replaces it.

The navigation is grouped so the pages you use most are near the top. Everything in the sidebar is documented in the chapters that follow.

Plans & billing

ACE Manager uses a **base-plus-usage** model rather than a flat per-person fee: each plan includes a bundle of **member records** and **team seats**, and you add more capacity only if you grow beyond the bundle. Billing is handled securely through Stripe, monthly or annually (annual saves roughly 17%).

PLAN	BASE PRICE	INCLUDED MEMBERS	INCLUDED TEAM SEATS	FOR
Free	Free	50	3	Small teams getting organised — dashboard, tasks, one integration. No AI messaging.
Growth	~$29 / mo	150 (extra members ~$0.15 each)	10 (extra seats ~$3 each)	Growing organisations — AI chat assistant, WhatsApp + email messaging, campaigns, 5 integrations, basic analytics. Starts with a 14-day trial.
Pro	~$59 / mo	500 (extra members ~$0.10 each)	25 (extra seats ~$2 each)	Established organisations — the **autonomous** AI operations agent, all five messaging channels, unlimited messages and campaigns, AI reports and digests, advanced analytics, custom branding, priority support. 14-day trial.
Enterprise	~$149 / mo	2,000 (extra members ~$0.08 each)	100 (extra seats ~$1.50 each)	Multi-campus and large networks — a dedicated AI agent instance and the highest limits. Contact sales.

Add-on modules can extend a plan where a capability isn't bundled. The exact contents of each tier, add-on availability, and final prices are **still being finalised during early access and may change** before general availability — treat the table above as indicative. Manage your subscription, seats, and payment method from Dashboard ‣ Settings (Admin only).

Where to go next

- Add your people → People — Members & Staff
- Set up your ministry structure → Departments, Teams & Small Groups
- Turn on the AI agent (and set its boundaries) → The AI Agent

SECTION 02

2 · People — Members & Staff

ACE Manager keeps two distinct groups of people, and it helps to understand the difference from the start:

02 · 2 · People — Members & Staff

ACE Manager keeps two distinct groups of people, and it helps to understand the difference from the start:

- **Members** — your congregation, community, or audience. These are the people you serve and communicate with. They live in the **Members** directory and interact through the self-service portal and their preferred messaging channel. They do not have dashboard logins.
- **Staff** — the people who run the organisation: admins, managers, and department leaders. They live in the **Team** directory and each have a dashboard login and a role.

This chapter covers both.

The Members directory (available)

Dashboard ‣ Members is your congregation directory — one place for everyone your organisation looks after.

The member card and grid

Members appear as a searchable grid of cards. You can:

- **Search** by name, email, or phone.
- **Filter by channel** — WhatsApp, SMS, email, Telegram, or Instagram.
- See each member's **engagement score** and their **last-attended** date at a glance.
- **Click a card** to open the full detail panel.

What a member profile holds

Each member record is rich — far more than a name and number:

- **Contact details** — name, email, phone, address.
- **Preferred channel** — the one platform this member wants to hear from you on (WhatsApp, SMS, email, Telegram, or Instagram). Every automated message respects this choice.
- **Communication preferences** — message frequency (all updates / important only / minimal), topics of interest, quiet hours, and language.
- **Department associations** — which ministries or teams the member belongs to; a member can belong to more than one.
- **Tags and groups** — free-form labels for targeting campaigns.
- **Engagement score & sentiment** — a rolling measure of how involved and how positive this member has been, used by the AI engagement monitor to flag people who may be drifting.
- **Attendance history** — a timeline of services attended, with an attendance rate (see Events, Attendance & Check-in).

- **Giving profile** — lifetime and year-to-date giving, if giving is enabled (see Giving & Donations).
- **Conversation history** — the full back-and-forth of messages with this member across every channel.

Talking to a member

Open a member and you'll find their **conversation thread** — inbound and outbound messages laid out like a chat. Staff can reply directly from here, and where the AI agent has replied on your behalf, those messages are shown too and clearly marked as agent-sent. This is the same conversation the member sees on WhatsApp, SMS, or wherever their preferred channel is.

Adding a member by hand

Use **Add member** to enter someone directly: name, email, phone, preferred channel, department(s), tags, and groups. Most organisations, though, let members add themselves — see below.

Department scoping

If you are a **Staff** (department leader), the Members directory shows only your department's members. **Admins and managers** see everyone. This is automatic and keeps each leader focused on the people they're responsible for.

Self-registration — the join link (available)

You rarely need to type members in one by one. Every organisation has a public **registration link** (`/join/{your-org}`) that anyone can open — no login required.

How it works:

1. From Dashboard ‣ Members, use the **registration link** button to copy your organisation's join URL.
2. Share it however you reach people — WhatsApp broadcast, email, a QR code on the projector, the church bulletin, your website.
3. The person opens the link and fills in a short form: their name and contact details, their preferred channel, and which department(s) they'd like to be part of. New members can optionally choose to join a department; returning members go straight to the department picker.
4. Their record is created instantly. They appear on the relevant **department leader's** Members page, and admins and managers see them across every view.

New members can trigger an automatic **welcome message** from the AI agent — see Communication, Campaigns & Care.

Member self-service

Beyond registering, members manage themselves through the **portal** — a personal, password-free area reached by a link you send them. There they update their own contact details and preferences, see their serving and events, and more. Because the portal touches so many modules, it has its own section: The Member Self-Service Portal.

The internal staff directory (available)

Dashboard ‣ Team is the directory of the people who run your organisation. It is visible to **Admins and managers only** — department leaders don't see the org-wide staff list.

Here you:

- See every staff member, their **role** (Admin / Manager / Staff), their department, and their online status.
- **Assign and change roles** — promote a leader to manager, or set a new hire as staff. Role changes take effect immediately and reshape what that person can see (see Getting Started ‣ Roles & access).
- Assign staff to the departments they lead.

Every staff member has a profile

Each staff member (including you) has a personal profile at Dashboard ‣ My Profile, which anyone can edit for themselves:

- **Personal information** — display name, phone, a short bio, and a profile photo you can upload or drag-and-drop (JPG, PNG, WebP, or GIF, up to 5 MB).
- **Government & compliance** — date of birth, gender, a national ID field (NIN, SSN, and the like), and a full address. These support HR and compliance needs; fill in only what your organisation requires.
- **Emergency contact** — a name, relationship, and phone number.

Each section saves independently, so you can update one part without touching the rest.

Members vs. staff — a quick reference

	MEMBERS	STAFF
Who	Congregation / audience	Admins, managers, department leaders
Where they live	Dashboard ‣ Members	Dashboard ‣ Team
Dashboard login?	No	Yes
How they interact	Portal + messaging channels	The full dashboard, by role
Added by	Self-registration or **Add member**	Invited and role-assigned by an admin/manager

Where to go next

- Organise people into ministries → Departments, Teams & Small Groups
- Reach members on their channel → Communication, Campaigns & Care
- Let members manage themselves → The Member Self-Service Portal

SECTION 03

3 · Departments, Teams & Small Groups

ACE Manager organises people two different ways, and the distinction matters:

03 · 3 · Departments, Teams & Small Groups

ACE Manager organises people two different ways, and the distinction matters:

- **Departments** are your **staff and ministry structure** — the teams that run the organisation (Worship, Youth, Media, Administration, and so on). They drive who leads what, and they scope what department leaders can see.
- **Small groups** are for your **members** — the cell groups, home groups, Bible studies, and connect groups where congregational life happens week to week.

A member can be served by a department (the youth ministry) and also belong to a small group (a Tuesday-night home group). They are not the same thing, and this chapter covers both.

Departments (available)

Dashboard ‣ Departments (Admin and manager only) is where you manage your ministry structure.

The department grid

Departments are shown in a categorised grid with coloured category headers and a live member count on each. The four default categories are **Ministry**, **Worship & Arts**, **Operations & Support**, and **Leadership** — the full list of ready-made departments is in Getting Started ‣ Seeding departments.

Managing departments

- **Seed defaults** — create the ready-made departments in one click.
- **Add a department** — create your own with a name, description, category, icon, and colour.
- **Edit** — rename, recolour, or recategorise.
- **Delete** — removing a department is an **Admin-only** action, deliberately restricted so a manager can't accidentally dismantle the structure.

Departments and access

Departments are the backbone of ACE Manager's role scoping. When a **Staff** member is assigned to lead a department:

- Their Members directory shows only that department's congregation members.
- Their dashboard congregation panel is scoped to that department.
- Department channels, tasks, and campaigns default to their department.

Admins and managers always see across every department. This is what lets a large organisation give each ministry leader a focused workspace while leadership keeps the whole picture. Assign leaders from the staff directory.

Department channels

Departments tie into the messaging system: admins and managers can create a **department channel** that automatically includes everyone in that department, so a whole team can be messaged at once. See Communication, Campaigns & Care ‣ Internal messaging.

Small groups (early access)

Dashboard ‣ Small Groups is the home for congregational groups — distinct from departments, and aimed at members rather than staff.

Creating a group

Each small group carries:

- **Name and description**, and a **type** — Bible study, prayer group, support group, age-based (youth, young adults, seniors), or interest-based.
- **Meeting details** — day of the week, time, and a location that can be physical or a video link (for online groups).
- **Language** — useful for multilingual congregations.
- **Leader** — the member or staff member who runs the group.
- **Capacity** — an optional limit, with a waitlist when full.
- **Join type** — **Open** (members can join themselves) or **Approval** (join requests go to the leader).
- **Status** — active, on break, or archived.

Membership and join requests

- Add or remove members directly, or let members find and join groups themselves through the portal.
- For approval-only groups, a member's **join request** notifies the leader, who approves or declines. Capacity limits are honoured, with a waitlist beyond them.

Meetings and leader tools

Group leaders get a focused toolkit for their own groups (and only their own):

- **Log meetings** — record the date, attendance, notes, and prayer points for each gathering.
- **Recurring schedules** — weekly, bi-weekly, or monthly, with a calendar file (.ics) members can add to their own calendars.
- **Message the group** — reach every member of the group at once through the AI agent and their preferred channels.
- **Group health report** — submit a short report to pastors.

Group discovery

Open groups appear in the member **portal**, where members browse and filter by day, location, type, or language and join in a tap. See The Member Self-Service Portal.

Analytics for leadership

Leadership can see how many members are in a small group versus not, track group attendance trends, and spot groups with low attendance that may need pastoral attention.

Departments vs. small groups — a quick reference

	DEPARTMENTS	SMALL GROUPS
Who they're for	Staff / ministry structure	Congregation members
Example	Media & Technical team	Tuesday-night home group
Managed at	Dashboard ‣ Departments	Dashboard ‣ Small Groups
Drives access scoping?	Yes	No
Members can self-join?	Via registration	Via the portal (open groups)
Who manages	Admin / manager	Group leader

Where to go next

- Schedule your ministry teams to serve → Volunteer Rotas & Serving
- Put people in the directory → People — Members & Staff
- Let members discover and join groups → The Member Self-Service Portal

SECTION 04

4 · Events, Attendance & Check-in

This chapter covers the full lifecycle of a gathering: planning an event, taking registrations and payment, recording who attended your services, and …

04 · 4 · Events, Attendance & Check-in

This chapter covers the full lifecycle of a gathering: planning an event, taking registrations and payment, recording who attended your services, and running secure children's check-in for families ministry.

Events & the calendar (available)

Dashboard ‣ Events (and the Calendar view) is where you plan everything from a weekly service to a one-off conference.

- **Create events** with a title, date and time, location, and an online/offline designation.
- **Calendar views** — see events by day, week, or month.
- **Recurring events** — set up weekly services and monthly meetings once.
- **Reminders** — the AI agent automatically reminds attendees and organisers as an event approaches (see The AI Agent); reminder timing is configurable.

Events also feed the dashboard's **Upcoming events** panel and drive post-event follow-up tasks.

Event registration & payment (early access, setup required for paid events)

Events can go beyond a calendar entry and take **registrations** — free, paid, or donation-based.

Setting up registration

When you enable registration on an event, you can define:

- **Pricing** — free, paid, or donation-based.
- **Ticket types** — Adult, Student, Child, VIP, Early Bird, and so on, each with its own price.
- **Capacity and waitlist** — cap the numbers, with a waitlist when full.
- **Registration deadline.**
- **Custom questions** — ask registrants anything you need (dietary requirements, T-shirt size, and the like).
- **Promo codes** — percentage or fixed discounts.

> **Paid registration needs Stripe connected.** Card payments run through Stripe, so paid tickets only work once an administrator has connected your organisation's Stripe account (see Integrations). Free events work without it.

The registration flow

Members register from the **portal** or a shared link. For paid events they pay by card (Apple Pay and Google Pay included) through Stripe checkout, then receive a confirmation over email or WhatsApp with the event details, a **QR-code ticket** for check-in, and a calendar invite (.ics).

On the day — event check-in

Open the event's check-in view and either **scan the QR ticket** or search by name to mark someone as arrived. Walk-ups can be registered at the door.

Managing registrants

Admins and managers see the full registrant list with payment status, can **export to CSV**, **message all registrants** at once, and process **refunds** through Stripe. When the event is full and someone cancels, the first person on the **waitlist** is automatically invited and given 24 hours to confirm.

Service attendance (early access)

Dashboard ‣ Attendance records who came to your regular gatherings — the data behind pastoral care and growth tracking.

Taking attendance

1. **Create a service record** — for example, "Sunday Service — 1 June, 10:00 am", with a type (main, midweek, or special) and location.
2. **Mark who attended** — search and tick off members, or pull the attendance straight from children's check-in.
3. **Record visitors** — add someone who isn't yet a member; they enter the visitor follow-up pathway (see Communication, Campaigns & Care).
4. **Count summary** — total attendance, first-timers, members, and children.

Attendance history and pastoral alerts

- Every **member profile** carries an attendance timeline (present / absent / visitor), an attendance rate over the last 30, 90, and 365 days, and a **last-attended** date on their card.
- **Absentee alerts** — the AI engagement monitor flags members who haven't attended in a configurable number of weeks (default four) and creates a follow-up task for their department leader, escalating to a pastor after longer absences. This is one of ACE Manager's most valued pastoral features: nobody quietly slips away unnoticed.

Trends

Attendance rolls up into week-on-week graphs, month-over-month comparisons, year-on-year for the same Sunday (to account for seasons), and a department breakdown showing which ministries are growing. See Reports & Analytics.

Children's check-in (early access)

Secure children's check-in is a **safeguarding** feature, not a convenience — and it is built to be safe by default. It runs at Dashboard ▸ Children's Check-in for staff, with a dedicated full-screen **kiosk** for families.

The check-in flow

1. A parent arrives and finds their family by typing a name or phone number.
2. They select which children to check in and which class or group each child is joining.
3. The system prints a **security label** for the child (name, class, a one-time security code, and today's date) and a **matching parent stub** carrying only the code.
4. The security code is random and changes every session, uniquely linking that child to that parent for that day.

Labels and medical flags

Labels are designed for standard label printers (DYMO LabelWriter and Brother QL series). A child's label carries a **QR code** linking to their record for quick lookup, and if the child has an **allergy or medical note**, it is flagged prominently so staff are alerted before the child is admitted to class.

Kiosk mode

The **kiosk** (`/kiosk`) turns a tablet or iPad into a self-service check-in station: full-screen, tap-to-search, keyboard hidden. Alternatively, staff can run an assisted station from a desk with a computer.

Check-out — the safeguarding gate

A child is only released when the returning adult presents the **matching security code**. A mismatch alerts staff and the child is held — there is no release without a code match. Each class keeps a **live register** of who is currently checked in, and if a child hasn't been collected a set time after the service ends, staff are alerted to a **late collection**. Historical registers are searchable by date and class.

Where to go next

- Schedule the volunteers who run these events → Volunteer Rotas & Serving
- Follow up with first-time visitors → Communication, Campaigns & Care
- Turn attendance into insight → Reports & Analytics

SECTION 05

5 · Volunteer Rotas & Serving

Every church and team lives or dies by its volunteer schedule — who is on the sound desk, who is welcoming at the door, who is teaching the children t…

05 · 5 · Volunteer Rotas & Serving

Every church and team lives or dies by its volunteer schedule — who is on the sound desk, who is welcoming at the door, who is teaching the children this Sunday. ACE Manager's **rotas** module handles this properly: not just a task list, but a repeating schedule of roles across your ministry teams, with unavailability, accept/decline, and swaps built in.

Dashboard ‣ Rotas is where leaders build and publish rotas; members manage their own serving from the portal.

> **Rotas are different from tasks.** A task is a one-off thing to do. A rota is a recurring schedule of positions to fill — Sound Lead, Drums, Vocals, Welcome — week after week, from a pool of qualified volunteers.

Building a rota (early access)

Serving teams and roles

First, define the **serving teams** that use rotas — Sound Team, Welcome, Children's Church, Worship, Ushers, and so on — and the **roles** within each. A worship team might have Lead Vocals, Backing Vocals, Keys, Drums, and Bass; the sound team might have Sound Lead and Monitor Engineer. Each role can specify a minimum required and a maximum allowed.

The rota grid

Create a rota for a team and you get a **grid view**: dates across the top, roles down the left, so you can see at a glance who is serving when.

- **Drag-and-drop** volunteers into positions and dates.
- **Rotation logic** can auto-rotate through a pool of qualified volunteers so the same people aren't always on.
- **Clone a previous rota** as a starting point instead of building from scratch.
- **Recurring rotas** — weekly, bi-weekly, monthly, or custom.

Clash detection

As you build, ACE Manager warns you about conflicts:

- The same person scheduled for two overlapping roles on the same day.
- A volunteer scheduled on a date they've marked **unavailable**.

Conflicts can be a **hard block** or a **soft warning**, configurable per role.

Unavailability (early access)

Volunteers mark the dates they can't serve — from the portal — before you build the rota. Admins see this unavailability up front, and a forward-looking calendar answers the everyday question, "Who's available on 15 June?" This is what keeps a rota realistic rather than a wishlist.

Publishing, accept & decline `early access`

A rota has a lifecycle:

1. **Draft** — visible only to you while you build it.
2. **Publish** — each assigned volunteer is automatically notified on their preferred channel (WhatsApp, email, or SMS). The AI agent drafts the message: "Hi [name], you're on [role] this Sunday [date]. Can you confirm?"
3. **Accept or decline** — each volunteer confirms or declines their assignment, with a deadline you can set per rota.
4. **On a decline** — you're notified and can reassign or find cover. The AI agent can suggest suitable replacements.
5. **Re-publish** — when you change a published rota, only the volunteers whose assignment actually changed are re-notified, so nobody gets spurious messages.

Swaps `early access`

Life happens, and volunteers need to swap. A volunteer can request a **swap** with another eligible team member; the request goes to both parties for confirmation, and admins see all pending swaps in one place. The AI agent can suggest suitable swap candidates based on role, availability, and how recently each person has served.

Serving history & over-serving `early access`

The rota module remembers who served when. You can:

- View **who served on any past date**.
- Confirm whether a scheduled volunteer **actually showed up** (this ties into attendance).
- See a **serving-frequency report** — who is over-serving and who is under-serving.

The AI agent watches for burnout and will flag it: "Marcus has served 6 of the last 7 Sundays — consider resting him." Caring for volunteers is as important as filling the slots.

What members see

From the **portal**, each volunteer sees only what concerns them: their upcoming assignments, with **accept / decline / swap** on each, their unavailability calendar, and their own serving history. They never touch the dashboard. See The Member Self-Service Portal.

Where to go next

- Set up the teams that serve → Departments, Teams & Small Groups
- Let the agent chase confirmations → The AI Agent
- Give volunteers their self-service view → The Member Self-Service Portal

SECTION 06

6 · Giving & Donations

Dashboard ‣ Giving is ACE Manager's giving and donations module: funds, recorded donations, pledges and stewardship campaigns, recurring giving, and y...

06 · 6 · Giving & Donations

Dashboard ‣ Giving is ACE Manager's giving and donations module: funds, recorded donations, pledges and stewardship campaigns, recurring giving, and year-end contribution statements — with the AI agent watching for lapsed and first-time givers in the background.

The Giving area is organised into tabs — **Donations**, **Funds**, **Recurring**, **Pledges**, and **Statements** — each covered below.

> **Card giving needs Stripe connected.** ACE Manager records giving from any source, but online card donations run through Stripe. An administrator connects your organisation's Stripe account once (see Integrations); cash, cheque, and bank-transfer giving can be recorded without it.

Funds `early access`

A **fund** is a designated pot that giving is directed to — General Fund, Building Fund, Missions, Youth Ministry, and so on. Each fund has a name, description, colour, and an optional **target amount**. Every donation is tagged to a fund, fund balances appear on the dashboard, and where a fund has a target you can track raised-versus-goal.

Recording donations (early access)

Donations can reach ACE Manager three ways:

- **By hand** — record a gift with its amount, date, fund, and payment method (cash, card, bank transfer, or cheque), assigned to a member or logged as anonymous.
- **Automatically from online giving** — when a member gives by card, Stripe notifies ACE Manager and the donation is recorded for you, tagged to the right fund and member.
- **Bulk import** — bring in historical bank transfers or payroll giving from a CSV.

Every donation ties back to the giver's profile, building their giving history over time.

Giving profiles (early access)

Each member's profile carries a **giving profile**: lifetime giving history, last donation date and amount, whether they're a regular or recurring giver, their year-to-date total, and their giving frequency (weekly, monthly, or sporadic). This gives pastoral and finance teams a complete, respectful picture of each household's generosity.

Giving is sensitive. Giving data is treated with care and shown only to the roles that need it. Consider carefully who in your organisation should have access before enabling it broadly.

Recurring giving (early access, setup required)

Members can set up **recurring gifts** — weekly or monthly — through the online giving flow, choosing the fund and amount. Recurring gifts run on Stripe and appear in the **Recurring** tab, where you can see who gives regularly and monitor the health of your regular income.

Pledges & stewardship campaigns `early access`

For capital appeals and stewardship drives, create a **giving campaign** with a target — for example, "Building Fund 2026 — Target: £50,000". Members make **pledges** (commitments to give an amount over a period), and ACE Manager tracks **pledged versus received** so you can see fulfilment at a glance. Pledgers who fall behind can be sent gentle, automated reminders by the AI agent.

Contribution statements `early access`

At year-end (or on demand), generate **contribution statements** — a PDF per donor summarising their giving, required for tax purposes in most jurisdictions. You can **batch-generate** statements for all active donors and email them directly to members through their preferred channel.

Online giving widget (early access, setup required)

For your website, ACE Manager provides a simple, embeddable **giving form**: Stripe-powered, accepting card, Apple Pay, and Google Pay, with fund selection by the donor and optional recurring setup. Donations made through the widget flow straight into the Giving module.

Reporting & the AI agent

Giving rolls up into reports you can pull in a click: total giving by week, month, or year; top donors (with an anonymised option); giving by fund; **lapsed donors** (gave last year, not this year); and **first-time givers** this month.

The AI agent adds a layer competitors don't have:

- It **monitors lapsed donors**: "12 members who gave last year haven't given yet this year — draft a gentle follow-up?"

- It surfaces **trends with context**: "Giving is down 18% vs last March — likely causes: Easter timing, school holidays."
- It can **thank first-time givers** automatically with a warm, personalised message.

All of this runs within the agent's guardrails and always respects the sensitivity of giving data — see The AI Agent.

Where to go next

- Connect Stripe → Integrations
- Let members see their own giving → The Member Self-Service Portal
- Let the agent chase lapsed givers → The AI Agent

SECTION 07

7 · Communication, Campaigns & Care

Communication is where ACE Manager is genuinely ahead of the field. It reaches members on their channel — WhatsApp, SMS, email, Telegram, or Instagram…

07 · 7 · Communication, Campaigns & Care

Communication is where ACE Manager is genuinely ahead of the field. It reaches members on **their** channel — WhatsApp, SMS, email, Telegram, or Instagram — with templates, scheduled campaigns, and an AI agent that can hold real conversations. This chapter covers outbound messaging (templates and campaigns), internal team messaging, and two care workflows built on top: prayer requests and visitor follow-up.

> **Messaging needs providers connected.** Outbound WhatsApp, SMS, Telegram, and Instagram messaging runs through a messaging provider (Twilio and equivalents), and email runs through a hosted email service. These are (setup required): an administrator connects them once, after which messaging works end-to-end. On the **Free** plan, AI messaging isn't included; on **Growth** you get WhatsApp and email; on **Pro** all five channels are available. See Plans & billing.

Channels — reaching members where they are (setup required)

Every member has a **preferred channel** set on their profile, and every message ACE Manager sends respects it. The five supported channels:

CHANNEL	BEST FOR
WhatsApp	The primary channel for most congregations — highest open rates, conversational
SMS	A reliable fallback and urgent reminders
Email	Longer content, newsletters, receipts, and statements
Telegram	Tech-savvy members and group broadcasts
Instagram DMs	A younger audience, event promotion, and engagement

Members also control **frequency** (all updates / important only / minimal), **topics of interest**, **quiet hours**, and **language** from their profile and the portal, so you reach people the way they've asked to be reached.

Message templates (available)

Dashboard ▸ Templates holds reusable message templates so common messages are consistent and quick.

- Insert **variables** like `{{first_name}}`, `{{event_name}}`, and `{{time}}` — they're filled in per recipient automatically.

- Templates can be **channel-specific** (a WhatsApp template, an SMS template, an email template), and WhatsApp templates track their approval status.
- Toggle **AI personalisation** on a template to let the agent tailor the wording to each member rather than sending it verbatim.

Campaigns (available; delivery requires providers)

Dashboard ‣ Campaigns sends a message to many members at once — a broadcast.

- **Campaign types** — event reminder, welcome, birthday, announcement, follow-up, devotional, volunteer confirmation, or a custom message.
- **Channels** — send on a single channel or several at once; each member still receives it on their preferred one.
- **Targeting** — everyone, a specific group, a tag, or a hand-picked selection of members.
- **Status flow** — Draft → Scheduled → Sending → Sent (or Cancelled). Schedule a campaign to go out at a chosen time and it respects members' quiet hours.
- **Delivery stats** — per campaign, see sent, delivered, read, replied, and failed counts.

Automated message moments

Beyond broadcasts, ACE Manager sends the right message at the right moment automatically (all drafted in your agent's voice):

- **Welcome** when a member registers.
- **Service and event reminders** ahead of time (24 h / 2 h / 30 min, configurable), without spamming.
- **Birthday and anniversary** greetings, scheduled from profile data, with optional personal notes from leaders.
- **Post-event follow-ups** that gather feedback ("How was Sunday? Reply 1–5 ⭐") and route a low rating to pastoral care.
- **Volunteer confirmations** for rotas (see Volunteer Rotas & Serving).
- **Devotionals** on a schedule set by leadership.

Two-way conversations (setup required)

Members can **reply** to any message and have a genuine conversation. The AI agent understands context, remembers the member's history, pulls live answers from your data ("What time is service this Sunday?", "Can I sign up for youth volunteering?"), and hands off to a human the moment a topic is sensitive. How the agent behaves, and every guardrail around it, is documented in The AI Agent.

Internal messaging (available)

Separate from member communication, Dashboard ‣ Messages is the **staff** communication hub — think of it as your team's internal chat.

- **Channels** for teams and topics, plus **1:1 direct messages** with a searchable member picker (existing DMs are reused rather than duplicated).
- **Department channels** — admins and managers create a channel that automatically includes a whole department.
- **Announcements** — admins post to the entire organisation or to selected departments.
- **Message deletion** — you can delete your own messages; admins can remove any message. Deletions are soft (the message shows as removed) and always confirmed first.

Who can create which channel type is role-based: staff can start direct messages and project channels; managers add department channels; only admins create announcements.

Prayer requests (early access)

Dashboard ‣ Prayer Requests is a care workflow no mainstream competitor offers with AI.

- **Members submit** a request — a title, details, and a **privacy level** (public, leadership only, or pastor only), with an anonymous option. Requests can also come in through the portal or by message.
- **The prayer board** lets leadership see active requests sorted by newest, unanswered, or urgent, filter by department, privacy, or assigned pastor, and mark each as Praying, Answered, or Closed.
- **AI-drafted responses** — the agent drafts a pastoral reply in your configured voice, but for prayer requests it **never sends without a pastor's approval**. The pastor reviews, edits, and sends via the member's channel.
- **Follow-up** — an automatic check-in after seven days ("We're still praying for you — how are things?"), and marking a request Answered invites a praise report.
- **Analytics** — request volume, average response time, and AI-tagged common themes (health, relationships, finances, work).

Visitor follow-up (early access)

New visitors are the highest-value contacts a church has, and Dashboard ‣ Visitor Follow-up makes sure none are missed.

- **Capture** visitors from a welcome-card form (shareable or embeddable), a quick "I met someone today" add from the attendance module, or a QR code at the entrance that lets visitors self-register on their phone.

- **Care pathway** — configure a sequence of touchpoints triggered by a first visit. A typical pathway: a same-day welcome, a personal note from a pastor on day 3, a small-group invitation on day 7, a pastoral check-in on day 14, and a membership invitation on day 30. Each step waits a set number of days, then sends on a chosen channel.
- **Pathway builder** — build custom sequences step by step. The AI drafts each message; staff can personalise before it sends, and any step can be **manual** (needs a person to act) or **automated** (the agent sends it).
- **Tracking** — see every visitor in the pipeline, what stage they're at, when they were last contacted, and whether they've replied.
- **Convert to member** — one button turns a visitor into a full member record, migrating their data and triggering a welcome-to-the-family message.

Where to go next

- Understand the intelligence behind all of this → The AI Agent
- Set members' channels and preferences → People — Members & Staff
- Measure engagement → Reports & Analytics

SECTION 08

8 · The AI Agent

The AI agent is what makes ACE Manager more than a database. It is an operations assistant that runs quietly in the background — assigning tasks, send...

08 · 8 · The AI Agent

The AI agent is what makes ACE Manager more than a database. It is an **operations assistant** that runs quietly in the background — assigning tasks, sending reminders, answering members, watching for people who are drifting, and drafting reports — and that you can also just talk to. Crucially, it works **within boundaries you set**, keeps a full audit trail, and asks before doing anything high-stakes.

This chapter explains what the agent does, how to give it a personality, the three modes it can run in, and — most importantly — every guardrail that keeps it safe.

> **The agent depends on setup.** It runs on a hosted AI service and, for member messaging, on your connected messaging providers. On a fully configured **Pro** account it works end-to-end; where the AI service or providers aren't connected, the interface is still there and ACE Manager degrades gracefully — you do the work manually and the agent panels stay quiet. Autonomous operation is a Pro capability; lower tiers get the chat assistant. See Plans & billing.

What the agent does

Talk to it — the agent chat

A **floating chat button** in the bottom-right of the dashboard opens a conversation with the agent from anywhere. Ask it questions in plain language and it answers from your live data:

- "Who's available this Sunday?"
- "How many tasks are overdue?"
- "Show me all staff in the worship department."
- "Which members haven't been seen in a month?"

Behind the scenes the agent turns your question into a query against your organisation's data and answers with real numbers — it does not guess. It can also **propose actions** (assign a task, draft a reminder) which, depending on its mode, it either does directly or offers for your approval.

Work on its own — background automations

Even when nobody is logged in, the agent runs scheduled jobs to keep operations moving:

AUTOMATION	WHEN	WHAT IT DOES
Daily digest	Each morning	Summarises yesterday's activity across the organisation and files it as a report for admins
Task reminders	Through the day	Nudges people about overdue and due-soon tasks (de-duplicated so nobody is nagged)

AUTOMATION	WHEN	WHAT IT DOES
Event reminders	Hourly	Reminds attendees and organisers about events in the next 24 hours
Engagement monitor	Each morning	Flags members inactive 30+ days or with low engagement, so pastoral care can follow up

It also drafts the routine member messages described in Communication, Campaigns & Care — welcomes, birthdays, rota confirmations, follow-ups — and, on incoming WhatsApp or SMS, can **auto-reply** in your agent's voice using the recent conversation for context.

Giving the agent a personality (available)

From Dashboard ‣ Settings ‣ Personality, you shape how the agent sounds so it feels like part of your team:

- **Name** — what the agent is called (many churches name it, e.g. "Grace Assistant").
- **Personality & tone** — friendly, formal, casual, pastoral, or friendly-pastoral.
- **Emoji use** — off, or minimal / moderate / frequent.
- **Response length** — a cap so replies stay brief.
- **Sign-off** — an optional closing line.
- **System prompt** — free-form additional instructions for anything specific to your organisation.
- **Knowledge** — point the agent at your website and an FAQ so it answers from your own information.

The three modes

The agent runs in one of three modes, set by an admin. This single choice determines how much it does on its own:

MODE	BEHAVIOUR
Autonomous	The agent carries out routine actions directly, without asking — auto-assigning volunteers, sending reminders, replying to common questions. High-stakes actions still require approval (see below). Pro
Approval only	The agent proposes everything and waits for a human to approve before acting. Nothing goes out without a click.
Chat only	The agent answers questions and gives suggestions, but never proposes or takes actions. Purely informational.

Start in **approval only** or **chat only** while you build trust, then move to **autonomous** once you're comfortable with what the agent does.

Guardrails — how the agent is kept safe

ACE Manager's agent is deliberately constrained. These guardrails are always in force.

Human-in-the-loop for high-stakes actions

Anything consequential — budget decisions, public communications, staffing changes, and **prayer-request responses** — requires a human's approval before it happens, even in autonomous mode. Proposed actions appear in the **Agent log** and as **pending approvals** on the dashboard, where an admin or manager approves, edits, or rejects them.

Working hours and quiet hours

The agent only acts within the **working hours** you configure (with a separate weekend toggle), so members aren't messaged at 2 a.m. and staff aren't nudged overnight. Member-facing messages additionally respect each member's own **quiet hours**.

A daily action limit

A configurable **maximum daily actions** cap prevents the agent from ever doing too much in a day — a safety ceiling on autonomous activity.

It never fabricates, and it protects privacy

The agent is instructed to reference **only your real organisation data** — it does not invent facts, figures, or member details. It is also instructed to protect member privacy and treats sensitive data (giving, pastoral notes) with care.

Escalation and pastoral-care handling

You define **escalation keywords** (like "emergency", "crisis", "urgent") that immediately alert leadership and pull the agent out of the conversation, and **pastoral-care keywords** (grief, illness, personal struggle) that route the conversation to a human on the pastoral team rather than the AI. The agent's line is always: "I'm connecting you with [name] who can help you with this." You can also give it a list of **topics to avoid** entirely.

Everything is logged — the audit trail

Every action the agent takes is written to the **Agent log** (Dashboard ‣ Agent, admin and manager only): what it did, when, why, and what triggered it. Nothing the agent does is invisible. Ask it "Why did you assign this to John?" and it will explain its reasoning.

The kill switch

If anything ever feels wrong, an admin can **pause all autonomous actions instantly**. The agent stops acting on its own immediately; you can resume when you're ready. This is the ultimate backstop — you are always in control.

Interaction modes at a glance

MODE	YOU DO	AGENT DOES
Autonomous	Set the rules	Acts on routine work directly
Approval	Approve / reject	Proposes, then waits
Chat	Ask	Answers and suggests
Override	Correct it ("assign Sarah instead")	Adjusts to your instruction

---

Where to go next

- Configure modes, hours, and limits → Dashboard ‣ Settings (Admin)
- See what the agent has done → Dashboard ‣ Agent (the audit log)
- Understand the messaging it drafts → Communication, Campaigns & Care

SECTION 09

9 · Reports, Analytics, Integrations & the Portal

This final chapter covers the three surfaces that surround everything else: the reports and analytics that turn your data into insight, the integratio…

09 · 9 · Reports, Analytics, Integrations & the Portal

This final chapter covers the three surfaces that surround everything else: the **reports and analytics** that turn your data into insight, the **integrations** that connect ACE Manager to the tools you already use, and the **member self-service portal** that lets your congregation manage themselves.

Reports & Analytics

Reports & digests (early access)

Dashboard ‣ Reports (admin and manager only) is where generated reports live — chiefly the AI **weekly and daily digests**. Rather than compiling updates by hand, you get a written summary of what happened across the organisation, produced by the agent and filed automatically each morning. You can also generate department reports, attendance summaries, and giving reports on demand.

The distinction ACE Manager draws is that reports are **generated, not compiled** — the work of gathering and summarising is done for you.

Analytics `early access`

Dashboard ‣ Analytics (admin and manager only) presents the trends behind the numbers, as theme-aware charts:

- **Attendance** — week-on-week, month-over-month, and year-on-year for the same Sunday, with a department breakdown.
- **Volunteer engagement** — who's serving, who's over- or under-serving.
- **Task completion** — how much is getting done, and where things stall.
- **Giving** — totals by period and by fund, lapsed and first-time givers.
- **Member engagement** — engagement scores and sentiment across the congregation.
- **Department performance** — a comparative view across ministries.

Charts adapt to light and dark themes and are designed to be readable at a glance.

Activity feed (available)

Dashboard ‣ Activity is a live, chronological feed of what's happening across the organisation — a quick pulse for anyone who wants to see recent changes without opening every module.

Integrations

Dashboard ‣ Integrations (admin and manager only) connects ACE Manager to the tools you already run. Integrations are being switched on progressively during early access — the panel shows each connection and its sync status, and some are further along than others.

INTEGRATION	WHAT IT DOES	STATUS
Stripe	Payments behind giving, event registration, and your subscription	(setup required) — connect your Stripe account to accept card payments
Google Workspace	Calendar (two-way sync), Drive (files), Gmail	(rolling out) — calendar sync is the priority; Drive and Gmail follow
Planning Center	Import church rosters, schedules, and volunteer data	(rolling out)
Zoom	Video links for online small groups and meetings	(rolling out)
Social platforms	Instagram, YouTube, and others for content and engagement signals	(planned / partial)
Slack / Teams	Bring team messaging into ACE Manager	`planned`

> **Honest status.** Stripe is the most mature integration because giving and registration depend on it. The others are being wired up during early access — the connection cards are present, and each lights up as it's completed. Check the Integrations panel for the current state on your account, and treat anything marked `planned` as not yet available.

CCLI song-use reporting `planned`

For churches using ACE Presenter to run worship, ACE Manager is designed to **capture song usage automatically**: when a song cue goes live during a service, ACE Presenter can notify ACE Manager, which logs the title, artist, CCLI number, and date, then generates the monthly CCLI report churches are legally required to file — replacing the usual spreadsheet. This cross-product integration is on the roadmap and pairs ACE Manager with ACE Presenter.

The Member Self-Service Portal

The **portal** is the member-facing side of ACE Manager — a lightweight, mobile-first area where your congregation manages themselves, taking a large share of routine admin off your staff. It is deliberately separate from the dashboard, which members never see.

No account, no password `early access`

Members don't sign up or remember a password. Instead, they open a **personal link** you send them — a secure, single-purpose link that is their authorisation. Tap it and the portal opens straight to their own information. If a link expires, they simply request a fresh one; there's nothing to reset. This is intentional: the easiest possible way in for people who aren't technical, on the phone in their pocket.

What members can do

From the portal, a member can:

- **See their serving** — upcoming rota assignments, with **accept / decline / swap** on each, plus their unavailability calendar and serving history (see Volunteer Rotas & Serving).
- **Manage events** — see the events they're registered for, and **register** for new ones (paying by card where the event is paid).
- **Browse and join small groups** — discover open groups, filter by day, location, type, or language, and join or request to join (see Departments, Teams & Small Groups).
- **See their giving** — a summary of their own donations, where giving is enabled.
- **Submit prayer requests** and see responses (see Communication, Campaigns & Care ‣ Prayer requests).
- **Follow church announcements.**

Managing their own details

Members keep their own record up to date — contact details, profile photo, emergency contact, and their **communication preferences**: which channel to reach them on for which kind of notification, their quiet hours, and their language. Because members maintain this themselves, your directory stays accurate without staff effort.

Specialised portal links

Alongside the main hub, ACE Manager can send members focused links for a single task — confirming a **rota** assignment, submitting a **prayer** request, or responding to a **visitor follow-up** — so a WhatsApp message can drop them straight onto the one screen they need.

> **The portal is mobile-first by design.** Until native mobile apps arrive, the portal is how members use ACE Manager on their phones — and it's built for exactly that. Staff, meanwhile, work in the dashboard, which is best on a larger screen.

The end of the manual

You've now seen every part of ACE Manager: setting up your organisation and people, structuring departments and groups, running events and check-in, scheduling volunteers, tracking giving, communicating across every channel, directing the AI agent, and giving members self-service. As an early-access product, ACE Manager is still growing quickly — modules marked `early access`, (rolling out), and `planned` will keep maturing, and this manual will be updated as they do.

- Back to the overview and table of contents
- Start setting up → Getting Started