Vestry

User Handbook

Everything your church runs on — people, giving, scheduling, safeguarding and communications — in one joined-up place.

The same guidance is built into the app: look for the ? by any page title, or open the Help centre.

Getting started

Welcome to Vestry, your church's administration hub. This section gets you in and oriented.

Signing in is quick and password-free. Enter your email address and we will send you a 6-digit code; type that code in and you are in. There are no passwords to remember or reset, so if you ever lose access just request a fresh code.

What you see in Vestry depends on your role. A treasurer sees giving and finance, the office team sees almost everything, and a rota volunteer sees only what they need. If a page or menu item is missing, it is simply not part of your role, not a fault.

The Setup guide

If you are setting up your church for the first time, follow the Setup guide. It walks you through the best order so nothing depends on a step you have not done yet:

- Enter your church details and branding (name, logo, colours, contact information).
- Add or import your people, so the rest of the system has contacts to work with.
- Add a giving fund and connect a payment provider, ready to receive donations.
- Invite your team and assign each person a role.
- Add your services and events so the calendar and rotas come to life.

You can leave the guide and return to it at any time; completed steps are ticked off.

The Dashboard

The Dashboard is your home screen and your daily snapshot. Across the top sit overview tiles: total contacts, upcoming events, pending bookings, rota gaps, giving this month, and DBS checks due. Click any tile to jump straight to that area.

Below the tiles you will find a "needs attention" list that surfaces anything time-sensitive, such as a rota with no one signed up or a booking awaiting your reply. There is also a "week ahead" view of what is coming up and a list of this month's birthdays, so no one is forgotten.

Two things are always within reach. Every page has a "?" button next to its title that explains what that page does. For anything bigger, open the searchable Help centre and type what you are trying to do.

People

People are at the heart of Vestry. This section covers everyone connected with your church and how their information is organised.

Contacts

Contacts hold everyone connected to the church, from longstanding members to first-time visitors. You can search by name and filter quickly, add your own free-text tags, and save segments (for example "Home group leaders") to reuse later. Your church can define its own custom fields to record whatever matters locally.

Bringing people in and out is straightforward: import from a CSV spreadsheet and export the same way. If the same person has been added twice, the find and merge tool helps you spot and combine duplicates without losing data.

Open any contact to see their full picture: a timeline with the date they were added, their consents, rota duties, giving history and pastoral notes, alongside their giving total, the groups they belong to and their family links.

Households and family

Households let you group people into families or homes that live together. Link spouses, parents and children so those relationships appear neatly on each person's profile.

If you delete a household, the people themselves are kept; only the links between them are removed. So you can reorganise families safely.

Member directory

The member directory is an opt-in photo directory of your congregation. The church switches it on, and then each member chooses from their own portal whether to appear and exactly what to share, such as email, phone or address.

No one appears without giving their consent, so it is safe by design. A confidential printable version is also available for when you need a copy on paper.

Groups

Groups cover your home groups and ministries, each with its leaders and meeting times. You can manage the membership of every group, adding and removing people as things change.

Per-group and per-ministry reports let you see at a glance who is involved and how each group is doing.

Visitor follow-up

New public sign-ups appear here automatically, so newcomers are never missed. Move each person through your welcome stages as you get to know them, then mark them as a member once they have settled in.

This keeps your welcome process consistent and ensures every visitor receives a warm, timely follow-up.

Birthdays and anniversaries

Browse birthdays and anniversaries by month to plan cards, calls and celebrations ahead of time. The dates themselves live on each contact's record, so keeping a profile up to date keeps this list accurate too.

Care & safeguarding

This part of Vestry holds some of your most sensitive information. Treat everything here as confidential, share it only with those who need it, and follow your parish and diocesan policies at all times.

Pastoral care & plans

Pastoral care lets you keep confidential notes on visits, bereavements, follow-ups and other contact with members of your church family. Each note has a category and a status so you can see at a glance what is open and what has been dealt with.

Care plans handle anything that recurs, such as a monthly home communion or a regular visit to someone who is housebound. When you mark a visit as done, Vestry rolls the next-due date forward automatically so the plan keeps ticking along without anyone having to reset it.

Each week the office receives an email reminder listing what is due, so nobody slips through the net during a busy season.

Prayer requests

Prayer requests come in from your public prayer page, so people can ask for prayer without needing an account. You can work through them and mark each one as Open, Answered or Closed.

Consent matters here. Requests shared as part of the prayer chain were submitted with the person's consent to be circulated; everything else stays leaders-only and should not be shared more widely.

Children's check-in

Children's check-in gives you a secure record of who is in your care and a pickup code to make sure each child leaves with the right adult. You can run a kiosk on a tablet in the foyer for parents to use themselves, or check children in from the office.

At check-in, each child is given a code printed on a child tag, along with a matching guardian tag for the adult who brought them. At pickup, the guardian's code must match the child's before the child is released. If a tag is lost, a leader can override and release the child after confirming their identity.

The Consent & medical register sits alongside check-in and holds allergies, medical needs and photo consent. Any recorded allergies flag automatically when a child is checked in, so your team is alerted straight away.

Safeguarding & DBS

The safeguarding area tracks DBS status and renewal dates for everyone who needs a check, flagging anyone whose certificate is expiring or has expired. You can also keep training records and manage ongoing casework in one place.

The incident log keeps a referenced, signed-off record of concerns, disclosures and accidents. Record facts only, avoid opinions or assumptions, and always follow your diocesan safeguarding procedure.

Serious concerns must be referred to your Diocesan Safeguarding Adviser (DSA) and, where appropriate, the statutory authorities. This area should be access-restricted by role so that only those with a safeguarding responsibility can see it.

Scheduling & worship

These tools help you plan the rhythm of church life, from the diary on the wall to the words on the screen on a Sunday morning.

Calendar & events

The calendar is your whole-church diary, viewable by month or as a simple list. You can add services, events and private bookings, all colour-coded so the different strands of church life are easy to tell apart.

Open any event for public registration and Vestry will collect RSVPs for you, with an optional capacity limit so you do not overfill a space.

Rotas

Rotas let you plan who is serving and quickly spot any gaps before they become a Sunday-morning scramble. Members can sign themselves up for open slots from their own portal, which takes some of the chasing off your hands.

Clash checks warn you if someone has been put down for two things at once. When you are ready, print four weeks at a time for the noticeboard, or send an "ask for volunteers" email to fill the remaining gaps.

Service planner & projection

The service planner lets you build a full order of service, including songs, readings and talks, and note who is doing what. You can print the order of service for those leading and serving.

For the AV desk, switch to Projection for a full-screen slide view that the operator can move through with a click or the arrow keys, keeping the words in step with the service.

Songs, CCLI & sermons

The song library is your reusable collection of worship songs. Each time you use a song, log it so Vestry can build your CCLI usage report, making your licence return far less of a chore.

You can also record sermons with the passage, speaker, date and a link to any media, building up a tidy archive of your church's teaching over time.

Resource library

The resource library is a store of reusable liturgies, prayers, talk outlines and readings. Draw on it whenever you are planning a service or event, so good material is never lost and never has to be rebuilt from scratch.

Bookings & lettings

Booking a room

The "New booking" form is the single place to make any booking, whether it is a one-off or a regular slot. Fill in the date and time, pick a hirer if you have one (you can leave this blank for internal use), and tick the room you need.

For a multi-room booking, simply tick more than one room on the same form, for example church plus hall plus kitchen for a wedding reception. This keeps everything as a single booking rather than several separate ones.

Use the Repeats? option to choose One-off, Weekly, Fortnightly or Monthly. A one-off creates a single pending request waiting for approval, while a repeat creates a regular booking that fills the diary automatically.

For repeats you can set an optional end date, which is ideal for term-time groups or short-run courses; leave it blank for an open-ended slot. When you approve any booking, Vestry checks for clashes, including in linked or adjoining rooms, so you will not accidentally double-book a space.

Regular bookings

The Regular bookings tab is where you manage everything that repeats. From here you can pause a booking (handy over Christmas or the summer break), set or adjust its end date, or generate the upcoming dates straight away rather than waiting.

A nightly job tops up future dates for you, so the diary stays populated without any effort. Use "generate now" only when you want to see the dates immediately.

Monthly repeats land on the same weekday-of-month each time. For example, a booking on the second Tuesday will continue to fall on the second Tuesday of every following month, not simply on the same date number.

Bookings calendar

The bookings calendar shows a room-by-week grid, giving you an at-a-glance view of what is happening across all your spaces. It is the quickest way to spot a free slot.

A multi-room booking appears in each of its rooms, so a single event spanning church and hall shows in both rows. Pending and confirmed bookings are colour-coded, making it easy to see what still needs approving versus what is settled.

Rooms, rates, people & assets

Before you take bookings, set up your rooms and tell Vestry which ones adjoin each other. This adjacency is what lets the clash check protect spaces that cannot sensibly be used at the same time, such as a hall and the kitchen that opens onto it.

Add a rate card for each room so quotes and invoices price themselves correctly. You can also define the people and equipment that can be booked alongside a room, for example a caretaker, a sound technician or the PA system, so nothing is forgotten when a hire is confirmed.

Quotes & invoices

From any booking you can raise an itemised quote or invoice, including VAT where it applies. A quote can be converted to an invoice once the hirer confirms, so you do not have to re-enter anything.

Send quotes and invoices by email, and take card payment through the church's own Stripe account, with the money going directly to your church. Overdue invoices are chased automatically, so you are not left manually reminding hirers.

You can print a statement for any hirer showing their full history, and an overview screen totals what is outstanding, overdue and paid so the treasurer always knows where lettings income stands.

External contacts

External contacts cover suppliers and any hirers who are not church members. Each contact is linked to their bookings and invoices, so you can see everything associated with a particular hall user or supplier in one place.

This keeps your member records clean while still giving you a tidy way to manage the people who use your buildings.

Public room booking

You can optionally turn on a public room booking page. This lets people see live availability and submit a request to hire a room without phoning the office.

Requests arrive in Vestry as pending bookings, so nothing is confirmed until a member of staff approves it. You stay in full control while saving the back-and-forth of enquiries.

Giving & finance

Giving & funds

Record gifts manually as they come in, or let donors give by card on your public giving page. Each fund tracks its progress towards a target, so you can show a building project or appeal moving forward.

When it is time to reclaim Gift Aid, export the Gift Aid schedule ready for HMRC, and produce annual donor statements to thank and account to your givers. You can also offer QR codes and text-to-give to make giving easy in the moment.

Pledges & stewardship

During a stewardship campaign you can record each person's pledge against a fund. Vestry then tracks pledged-versus-received, so you can see at a glance how much has actually arrived compared with what was promised.

This makes follow-up straightforward and gives the PCC a realistic picture of expected income.

Finance & budgets

The finance area covers income, expenses and budget-versus-actual for each fund, so you can see where you stand throughout the year. Record a spend directly, or let volunteers submit expense claims with a receipt attached for the treasurer to approve.

Only approved spend counts towards your figures, which keeps the accounts trustworthy. Use Collection counting to reconcile cash from the plate, so what was counted matches what is banked.

Year-end pack

When the APCM or a PCC meeting approaches, the year-end pack pulls together income, Gift Aid, expenses and collection totals in one click. There is a print view, so you can produce a clean copy for the meeting without rekeying anything.

This turns what is often a fiddly evening of spreadsheets into a single, dependable report.

Communications

Vestry brings all your congregation contact into one place. Use these tools to reach the right people, gather information, and stay on top of who might need a gentle check-in.

Messages

Messages lets you send email and SMS to your congregation. Choose an audience first, such as a group, a rota team, or everyone who has given consent, so the message only reaches the people you intend.

Email sends for real to live inboxes, so do check your recipients before sending. SMS is delivered through your church's own Twilio account if you have one set up.

You have three choices when a message is ready: send it now, save it as a draft to finish later, or schedule it for a future date and time. Scheduled messages can also be set to repeat weekly, fortnightly or monthly, which is handy for regular notices like a Sunday reminder or a monthly newsletter.

Email templates

Templates save you rewriting the same email every time. Each template stores a subject line and a body that you can reuse whenever you compose a new message.

When writing an email, simply pick a template to drop its layout straight into your draft, then tweak the wording for the occasion. This keeps your communications consistent and saves time on routine sends.

Sign-ups and forms

Sign-ups and forms let you collect information from the public through simple online forms, such as a newsletter sign-up, an event booking, a prayer request, or a general enquiry. Each form has its own shareable link that you can post on social media, print in a pew sheet, or add to your website.

Responses land directly in Contacts with the correct consent already recorded, so you stay on the right side of data protection without extra admin. Every form is automatically protected from spam and bot submissions by Cloudflare Turnstile.

If your church runs on its own domain, you can add your own Turnstile keys in Settings for full control over spam protection.

We missed you

We missed you helps you spot members who may be quietly drifting away. It flags people with no recent giving or rota activity, using a threshold in days that you set to suit your church.

Once flagged, you can reach out with a friendly nudge to let them know they are missed. A weekly summary is also sent to the office automatically, so no one slips through the cracks.

Admin & settings

These tools cover the behind-the-scenes running of your church account, from who can log in to how your public pages look.

Team

The Team area is where you add staff and volunteers and give each one a role. There are no passwords to manage; everyone signs in with a 6-digit code sent to their email address.

A single person can have several login emails if they need to, which is useful for shared or changing addresses. Their role determines which areas of Vestry they can see and use.

Permission groups

Permission groups give you finer control than roles alone. A group overrides a person's normal role, letting you tick exactly which areas they are allowed to use.

To help you decide, a matrix shows what each built-in role can access by default. Use groups when someone needs an unusual mix of access that no standard role quite covers.

Documents

Documents is your church's secure filing cabinet for policies, PCC minutes, risk assessments and similar paperwork. You can upload a file directly or simply link to one held elsewhere.

Each document is marked either Public or Restricted, so you can share what should be visible to all while keeping sensitive items to authorised staff only.

Import data

Import data brings existing records into Vestry from spreadsheets, so you do not have to retype everything by hand. You can import contacts, giving history and events.

Files should be in CSV format with a header row at the top. Take a moment to check your columns line up before importing, as this gives the cleanest result.

Data and privacy (GDPR)

This area helps you meet your data protection responsibilities. You can manage each person's consent so you always know who has agreed to be contacted and how.

If someone makes a subject access request, you can export all the data Vestry holds on them in one go. You can also erase records when someone asks to be removed.

Settings

Settings is organised into tabs covering every part of how your church account behaves. Here you set your church details, public content and branding, including your logo, colour and tagline.

You can also configure your own email sending through SMTP, SMS through Twilio, spam protection, and your invoicing details. The public room-booking toggle, which controls whether outsiders can request to hire your spaces, also lives here.

Billing and plan

The Billing and plan area shows your current plan and which modules are active. The free core of Vestry is always included, so your essential admin never depends on a subscription.

To add premium modules or arrange a licence, simply contact support and we will set things up for you.

Reports & insight

Vestry turns your day-to-day records into clear pictures of how your church is doing, and helps with the returns you are required to make.

Reports and trends

Reports and trends shows twelve-month trends across attendance, giving and growth in one view. It is a quick way to see whether numbers are rising, holding steady or slipping.

When you need something to share with the PCC or wider leadership, there is a printable report ready to go.

Statistics for Mission

Statistics for Mission takes the pain out of the Church of England's annual return. The helper pre-fills the return using your existing attendance and membership data.

The completed form is ready to print, so your annual reporting becomes a check-and-submit job rather than a counting exercise.

For members & the public

These features let your members help themselves and present your church well to the wider world.

Member portal

The member portal is where members sign in to manage their own involvement. They can see rota slots and volunteer for them, update their personal details, and view the groups they belong to and their giving.

Members can also manage their own directory listing, choosing what fellow members see, which reduces the requests that come to the office.

Public pages

Your public pages are the church-facing side of Vestry, including What's On, giving, room booking, sign-up forms and prayer. They all sit on your own church address and carry your logo and colour.

This means visitors get a consistent, branded experience whether they are booking a hall, making a gift, or asking for prayer.

Getting help

Help is built into Vestry wherever you need it. Every page has a "?" beside its title that explains what the page is for and its main functions.

The Help centre lists everything in one place and is fully searchable, so you can look up a task whenever a question arises. This handbook is the printable reference for those who prefer to read it all in one document.

Need a hand? Use the ? on any page or the Help centre in the menu. For anything else, contact support@shire-tech.co.uk.