



Using Aplos and Planning Center Online Together



CASE STUDY

Jessica Ordaz, LIFE | CHURCH, Administrator

► Challenge

LIFE|CHURCH, a Foursquare church in Chico, California, with about 400 members, has been using Planning Center Online for their database, groups, events, services, worship music, and giving. Although they have been happy with Planning Center Online (PCO), one thing missing from the software is accounting, so LIFE|CHURCH had to find a solution that would work with PCO.

As the Administrator, Jessica Ordaz manages all the details for LIFE|CHURCH, including their finances, events, and facility projects. After taking over the accounting from the previous bookkeeper, who had been using paper and pencil to keep track of their finances, Jessica started using QuickBooks®.

She soon realized QuickBooks® came with significant limitations. In particular, it made fund accounting a headache. "The software was not designed for churches," she said. It also couldn't integrate with the reporting system for Foursquare churches, which meant "it was always a challenge to find workarounds to put everything in the right category." Her Foursquare district administrator recommended switching to Aplos.

Accounting Solution

- Paper And Pencil
- QuickBooks®
- Aplos



► Solution

Aplos turned out to be a great fund accounting solution for LIFE | CHURCH, and it has worked seamlessly alongside PCO. "It's easy to see how the two fit together," Jessica said. She can easily account for Planning Center donations in Aplos. "When the deposit amount integrates into the Aplos check register, I check the corresponding deposit posted in Planning Center to accurately categorize it."

Using tags in Aplos also helps her keep track of all the granular details and generate the required financial reports for Foursquare. "With the tags, it is very easy to account for the expenses and run the report which aligns with what is needed," she explained.



I appreciate the personal touch and response from Aplos. Any issues I've had are quickly addressed and it seems like Aplos cares about what is best for their customers.



For other churches that need an accounting solution to work with Planning Center, Jessica would recommend Aplos. "I'd recommend switching over at least for the accounting side," she said. "And if they aren't too invested in Planning Center, it would be easy to use all of Aplos' functionality and have it all going to one place."

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