GUIDE FOR GROUP ADMINS

Ledgerly Group Admin Guide

Set up Ledgerly for your congregation and lead a ministry that lasts

Learn to:

- Launch Ledgerly in your group in 30 days
- Invite members with invite codes
- Manage members, courses, and cohorts
- Read your reports and usage numbers
- Brand the platform and set up email



"But everything should be done in a fitting and orderly way." 1 Corinthians 14:40

This guide is for you.

Ledgerly brings together courses, money tools, workbooks, and certificates for every group and every member. Print it, copy it, and share it with your congregation.

HOW TO USE THIS GUIDE

1. Read Chapter 1 first — it's a 30-day launch plan that points to everything else.
2. Keep the admin screen open beside this guide; every tab name matches.
3. Hand the Instructor Guide to your class leaders and the Student Guide to your members.
4. Review Chapter 7 with your pastor before your launch Sunday.

PRINCIPLES WE KEEP

- Ledgerly is free for your group and every member — say so in every announcement.
- Members' budgets, debts, savings, and net worth are private. Admins can't see them, by design.
- Guard member data like the offering: share it only with leaders who need it.
- Two admins, always — never let one person hold the only keys.
- Invite widely, launch small, celebrate often.

> **You hold your members' trust**
>
> As an admin you can see members' names, contact details, roles, and course progress — never their budgets, debts, or savings. Never share member data outside group leadership, never use it for fundraising or marketing, and deactivate accounts promptly when someone asks to leave.

"But everything should be done in a fitting and orderly way." — 1 Corinthians 14:40

LEDGERLY PLATFORM GUIDE · G04

Ledgerly Group Admin Guide

Set up Ledgerly for your congregation, invite your members, and lead a financial-discipleship ministry that lasts

The Ledgerly Curriculum Team
Ledgerly.app

Ledgerly.app

Ledgerly Group Admin Guide
Ledgerly Platform Guide G04 · Edition 3.0 · September 2026

Published by Ledgerly.app.

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About the screens. Menu names, buttons, and features are described as they appear on Ledgerly.app in September 2026. The platform is updated regularly; if a screen looks different, the newest edition of this guide is always linked in the footer of Ledgerly.app.

Not advice. Ledgerly is a teaching platform, not legal, tax, investment, insurance, or accounting advice, and no advisory or fiduciary relationship is created by using it.

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Guide ID FF-GD-G04-3.0

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Introduction

Most groups know their members struggle with money. Few have a plan for helping. Ledgerly gives you that plan: a complete biblical curriculum, practical tools members use at home, and group features for classes — all free.

Your job as group admin is to open the door and keep it open. This guide shows you how, from your first invite code to a ministry that runs year after year.

About This Book

The *Ledgerly Group Admin Guide* is part of the Ledgerly Platform Guide Series. Your members use the *Student Guide*, your class leaders use the *Instructor Guide*, and everyone starts with the *Ledgerly User Guide*.

Everything here happens under **Admin** in the left-hand menu, which has eight tabs: **Dashboard**, **Users**, **Courses**, **Invite Codes**, **Cohorts**, **Reports**, **Settings**, and **Email Log**. Each tab has its own address (for example, ledgerly.app/admin/settings), so you can bookmark or share it. Tab and button names appear in **bold**, exactly as on screen.

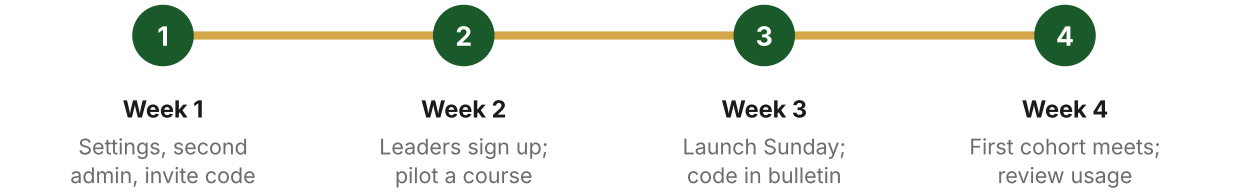
This Guide at a Glance

BY THE END OF THIS BOOK YOU WILL

1. Launch Ledgerly in your group with a 30-day plan.
2. Invite members with invite codes, or add them yourself.
3. Manage roles, deactivate accounts, and protect member data.
4. Publish courses and set up cohorts for classes.
5. Read your dashboard, usage, and reports.
6. Set your group’s branding and outgoing email.

Admin tabs you'll use: Dashboard; Users; Courses; Invite Codes; Cohorts; Reports; Settings.

FIGURE I-1 **Your 30-day launch**



Foolish Assumptions

In writing this workbook, we made a few assumptions about you:

- You registered your group on Ledgerly, or an existing admin made you one.
- Your pastor supports offering financial discipleship.
- You're comfortable with web forms and a little spreadsheet work.
- You'll use Ledgerly yourself — the best admins are also students.

Icons Used in This Book

Look for these icons in the margins. Each one flags a particular kind of information:

TIP
A shortcut, a better way to do something, or a trick that saves time or money.

REMEMBER
Something important enough to keep in your head after you close the book.

WARNING
A mistake that costs real money, damages credit, or hurts people. Slow down when you see this one.

TECHNICAL STUFF
The math, law, or fine print behind a recommendation. Interesting, but you can skip it and still do the work.

Beyond the Book

Ledgerly brings together the courses, the money tools, the workbooks, and these guides for every group and every member. Every track has a printable workbook on the **Workbooks** page, and every guide in this series is linked in the footer of **Ledgerly.app**.

Where to Go from Here

Just registered your group? Follow Chapter 1’s 30-day plan.

Ready to invite people? Chapter 2 covers invite codes and adding members.

Planning a class? Chapter 4 covers cohorts.

Setting up email or your logo? Chapter 6.

PART 1

Launching

A 30-day plan to go from registration to your first class, and how to get people signed up.

Chapter 1 Your 30-Day Launch Plan

Chapter 2 Members and Invite Codes

CHAPTER 1

Your 30-Day Launch Plan

3 sections · Luke 14:28

IN THIS CHAPTER

- What to do in each of your first four weeks
- Choosing a second admin
- How to announce Ledgerly

You can open Ledgerly to your whole group tomorrow. But groups that launch with a plan see far more people finish a course. Here's a proven four-week sequence.

SECTION 1.1

Weeks 1 and 2: get ready

1. **Settings:** add your group name, logo, and colors, and set up outgoing email (Chapter 6).
2. **Second admin:** choose a trusted person and make them an admin from **Users** (Chapter 2).
3. **Invite code:** generate one for leaders only, with an expiry date (Chapter 2).
4. **Leaders sign up:** pastors, elders, and future class leaders create accounts and each finish one lesson.
5. **Pilot:** your leaders take a short course together — Foundations of Budgeting & Stewardship is ideal.



TIP

Ask each leader to write down one thing that confused them. Those notes become your FAQ for launch Sunday.

SECTION 1.2

Weeks 3 and 4: launch

1. **Launch Sunday:** announce Ledgerly from the pulpit, and put the invite code and *ledgerly.app/register* in the bulletin.
2. **Help table:** set up a table after services with a laptop and a leader to help people register.
3. **First class:** start one cohort with a Foundations course (Chapter 4).
4. **Review:** at the end of week four, check your **Dashboard** usage numbers and follow up with anyone who registered but hasn't started.

REMEMBER

Every announcement should say it plainly: every course, workbook, and certificate is included for the group and every member.

SECTION 1.3

A sample announcement

FROM THE PULPIT OR BULLETIN

“Money is one of the most talked-about subjects in the Bible — and one of the least talked-about in group. Starting today, every member of our group has access to Ledgerly at no cost: biblical money courses for every age, printable workbooks, and private tools for budgeting, paying off debt, and saving. Sign up at ledgerly.app/register with the code in your bulletin. It’s available at no cost, for you and your whole family.”

QUICK CHECK

- [ ] Settings are done and a second admin is in place.
- [ ] Leaders have signed up and piloted a course.
- [ ] Launch Sunday is on the calendar.

CHAPTER 2

Members and Invite Codes

3 sections

IN THIS CHAPTER

- Generating and sharing invite codes
- Adding members yourself, one at a time or in bulk
- Editing, deactivating, and deleting accounts

Members join your group's space on Ledgerly with an invite code, or you add them yourself. Either way, this chapter has you covered.

SECTION 2.1

Invite codes

1. Open **Admin** → **Invite Codes** and choose **+ Generate Code**.
2. Add an **Optional label** so you remember who it's for (for example, *Launch Sunday* or *Youth Group Spring*).
3. Set **Max uses** — 0 means unlimited.
4. Set an **Expires** date if you want the code to stop working after an event.
5. Choose **Generate**, then use the 📋 button to copy the code.

The table shows each code's **Uses**, **Max Uses**, **Status**, and **Expires** date. Use the red and green buttons to turn a code off or back on, and 🗑 to delete it.

TIP

Make a separate code for each group or event. The **Uses** column then tells you exactly where your sign-ups came from.

WARNING

A code posted publicly online can be used by anyone. For public posts, set a max-uses limit and an expiry date.

SECTION 2.2

Add members yourself

Open **Admin → Users**. To add one person, choose **+ Add User** and fill in their name, email, a starting password, their role, and age group, then choose **Create User**.

To add many people at once, choose 📤 **Bulk Upload**, pick **CSV** or **JSON**, then paste the data or upload a file. CSV columns are *first_name,last_name,email,role,age_group,phone*.



WARNING

Bulk upload fills in a **Default Password** for anyone without one, and the box starts out as *changeme123*. Replace it with a strong temporary password before uploading, and ask everyone to use **Forgot password?** on the sign-in page to set their own.



TIP

Most group management systems can export a member list to CSV. Rename the columns to match, and delete anyone who hasn't agreed to join.

SECTION 2.3

Edit, deactivate, and delete

The Users table lists each member's **Name**, **Email**, **Role**, **Age**, **Status**, **Joined** date, and **Last Login**. Search by name or email, and filter the list at the top.

👁 View
: See a member's details and how many courses they're enrolled in.

✏️ Edit
: Change name, email, role, age group, phone, household details, or set a new password.

Deactivate
: Blocks sign-in but keeps everything. Use this when someone leaves the group.

🗑 Delete
: Removes the account and everything tied to it. This can't be undone.



REMEMBER

When in doubt, deactivate. You can always reactivate an account; you can't undelete one.



TECHNICAL STUFF

You can make another member an **Admin** from the edit form. The **Instructor** role is currently granted by the Ledgerly platform team — see the box in Chapter 4.

QUICK CHECK

- [ ] I've generated a labeled invite code with limits.
- [ ] I know how to add members one at a time or in bulk — with a strong default password.
- [ ] I know the difference between deactivate and delete.

PART 2

Running the Ministry

Courses, cohorts, reports, settings, and the stewardship of member data.

Chapter 3 Courses and the Curriculum

Chapter 4 Cohorts: Classes and Small Groups

Chapter 5 Dashboard, Usage, and Reports

Chapter 6 Branding and Email Settings

Chapter 7 Stewarding Member Data and Trust

CHAPTER 3

Courses and the Curriculum

3 sections

IN THIS CHAPTER

- What's already in your catalog
- Publishing and unpublishing courses
- Importing and exporting course bundles

Your group starts with the full Ledgerly curriculum: 277 courses and 966 lessons in 18 tracks, each tagged by audience from Kids to Seniors. Most groups never need to build a course from scratch.

SECTION 3.1

Your course catalog

Open **Admin** → **Courses** to see every course with its **Title**, **Mode**, **Age Group**, **Status**, and number **Enrolled**.

Where to point people first

Group	Recommended starting track
Every adult	Track 1 · Foundations of Budgeting & Stewardship
People in debt	Track 4 · Debt Management & Relief
Couples and premarital classes	Track 13 · Marriage, Family & Special Audiences
Children's ministry	Track 17 · Money Smarts for Kids
Youth group	Track 18 · Teen Money Foundations
Seniors' ministry	Track 7 · Retirement Planning & Income

TIP

Every track has a free printable workbook on the **Workbooks** page. Print them for classes — they're free to copy for teaching.

SECTION 3.2

Publish and unpublish

Only **Published** courses appear in members' catalog. Use the **Publish** / **Unpublish** button on a course to show or hide it. Unpublishing hides a course without touching anyone's progress.

WARNING

🗑 **Delete** removes a course, its lessons, and every member's progress in it. Unpublish instead unless you're certain.

SECTION 3.3

Import and export course bundles

Under **Admin** → **Settings**, **Course Export / Import** lets you move a course between groups as a JSON file.

- **Export Course with Branding:** choose a course and **Export Course (JSON)**. The file includes its lessons and content plus your group's logo and colors.
- **Import Course:** choose a **Course Bundle JSON File** and **Import Course**. Tick the branding option only if you want the sending group's logo and colors to replace yours.

TIP

This is how a group plant can share a custom course with its sending group, or how you can keep a backup of a course you've customized.

QUICK CHECK

- [ ] I know what's in our catalog and where to point each group.
- [ ] I know how to publish and unpublish.
- [ ] I know what a course bundle is for.

CHAPTER 4

Cohorts: Classes and Small Groups

3 sections

IN THIS CHAPTER

- Creating a cohort
- Adding members and recording attendance
- What the Ledgerly team handles for now

A **cohort** is a group taking one course together on a schedule — a Wednesday-night class, a Sunday-school series, or a small group. Cohorts give instructors attendance, assignments, messages, and progress tracking.

SECTION 4.1

Create a cohort

1. Find the course's ID: open the course from **Courses** in the left-hand menu and look at the address bar — in *ledgerly.app/courses/123*, the ID is **123**.
2. Open **Admin** → **Cohorts** and choose **+ New Cohort**.
3. Enter a **Name** (for example, *Budgeting Basics — Wed Nights, Fall*), the **Course ID**, **Start Date**, and **End Date**.
4. Set **Status** to **Upcoming**, **Active**, or **Completed**, and choose **Create Cohort**.

The Cohorts table shows each cohort's course, members, dates, and status. Use ✏️ to edit and 🗑 to delete.

> ⚠ **WARNING**
> Deleting a cohort deletes its enrollment and attendance records.

SECTION 4.2

Members and attendance

Open a cohort with 👁 to see its roster, attendance, and lesson progress. Use 📋 **Attendance** to record a session (**Present**, **Absent**, or **Excused**) and **Remove** to take someone off the roster.

Members can also enroll in the cohort's course themselves from **Courses** — ask everyone to do this before the first session so their lesson progress is ready to track.

TIP

Instructors can take attendance themselves from their own Instructor screen, including **Late**. Let them own it.

SECTION 4.3

Handled by the Ledgerly team (for now)

ASK THE LEDGERLY TEAM TO...

- **Grant the Instructor role** to your class leaders.
- **Assign an instructor** to each cohort.
- **Add members to a cohort** (the **+ Enroll User** form asks for a User ID, which the admin screens don't display yet).

These controls are being added to the Admin screens. Until then, send the details to the Ledgerly team through the Contact page and they'll take care of it.

QUICK CHECK

- [ ] I can create a cohort with the right Course ID.
- [ ] I know how members join and how attendance works.
- [ ] I know what to ask the Ledgerly team for.

CHAPTER 5

Dashboard, Usage, and Reports

3 sections

IN THIS CHAPTER

- Your admin dashboard
- Usage numbers and what they mean
- Enrollment, completion, and demographic reports

Numbers aren't the ministry, but they tell you where to pay attention. Check your dashboard weekly and your reports monthly.

SECTION 5.1

The admin dashboard

Card	What it counts
Total Users	Everyone registered in your group
Courses	Courses in your catalog
Active Enrollments	Enrollments still in progress
Completed	Course completions
Cohorts	Your classes and groups
Completion Rate	Completed enrollments as a share of all enrollments

Recent Activity shows the latest registrations, enrollments, and completions.

SECTION 5.2

Usage

The **Usage** panel covers the last 30 days: **Page Views**, **Active Users**, **Logins**, and **Total Events**, with a daily chart and a list of the most common actions (like lessons viewed, budgets updated, and debts added).

WORKED EXAMPLE **Reading the numbers**

Suppose 120 members registered, but **Active Users** for the month is 38. That isn't failure — it's a follow-up list. A personal note from a class leader to the other 82 usually brings a third of them back.

REMEMBER

Usage counts activity, never content. Nobody at your group can see what a member typed into their budget.

SECTION 5.3

Reports

Open **Admin** → **Reports** for three views:

Enrollment Trends
New enrollments over time. Look for the bump after each announcement.

Completion Rates
Course completions over time. Rising completions mean people are finishing, not just starting.

Demographics Breakdown
Members by age group, role, and gender (when provided). Use it to plan classes for the groups you serve.

TIP

Share one number with your pastor each month — for example, courses completed — plus one story. Numbers inform; stories inspire.

QUICK CHECK

- [ ] I check the dashboard weekly.
- [ ] I know what Active Users means and how to follow up.
- [ ] I review reports monthly.

CHAPTER 6

Branding and Email Settings

3 sections

IN THIS CHAPTER

- Your group name, logo, and colors
- Setting up outgoing email
- Checking the email log

Two settings make Ledgerly feel like your group's own: branding and email. Both live under **Admin → Settings**.

SECTION 6.1

Branding

Group Name
Shown to your members across the platform and in emails.

App Name
The name members see for the app.

App URL
The web address used in email links — normally *https://ledgerly.app*.

Primary Color / Secondary Color
Your group's colors for buttons and highlights.

Logo URL
A full *https://* link to your logo (a PNG or SVG with a transparent background works best).

Choose **Save Settings** when you're done.

SECTION 6.2

Outgoing email

Password resets, welcome messages, and certificate notices are sent by email. Under **SMTP / Email**, enter your email provider's details:

Field	Example
SMTP Host	smtp.gmail.com or your provider's server
SMTP Port	587
SMTP User	noreply@yourgroup.org
SMTP Password	An app password from your provider — not your normal password
From Email	noreply@yourgroup.org
From Name	Ledgerly at Grace Group

Choose **Save Settings**, then **Send Test Email** and check your inbox.

> ⚠ **WARNING**
> Use a ministry email account, not a personal one, and an *app password* where your provider offers one. If the person who set it up leaves, change the password.

SECTION 6.3

The email log

The **Email Log** tab (or **View Email Log** next to **Send Test Email** in Settings) lists recent outgoing emails with the recipient, subject, status, and time. When a member says "I never got the reset email," check here first.

Status	What to do
Sent	Ask the member to check spam or junk.
Failed	Check your SMTP settings and send a test email.
Not listed	Check the email address on their account for typos.

QUICK CHECK

- [ ] Our name, logo, and colors are set.
- [ ] Outgoing email works and the test arrived.
- [ ] I know how to use the email log.

CHAPTER 7

Stewarding Member Data and Trust

3 sections · Luke 16:10

IN THIS CHAPTER

- What admins can and can’t see
- Privacy practices for your group
- Handling requests to leave

Members will only use Ledgerly honestly if they trust it. That trust depends partly on the platform’s design and partly on you.

SECTION 7.1

What you can and can't see

You can see	You can’t see
Name, email, phone, age group, household details	Budgets and spending
Role, status, joined date, last login	Debts and payments
Course enrollments and lesson progress	Savings goals and net worth
Cohort attendance	Baby Steps notes and money details

REMEMBER

Tell your members this plainly. “Nobody at group can see your budget” removes the biggest reason people hesitate to start.

SECTION 7.2

Privacy practices

Whoever can be trusted with very little can also be trusted with much. **Luke 16:10**

- Keep the number of admins small — two or three.
- Never use member data for fundraising, marketing, or anything unrelated to discipleship.
- Don’t forward rosters or member lists by email; share them only with leaders who need them.

- Remove admin access when someone steps out of the role.
- Deactivate accounts promptly when someone asks to leave, and delete them if they ask for their data to be removed.

SECTION 7.3

Your annual review

1. Review who has admin access and remove anyone who no longer needs it.
2. Turn off invite codes you no longer use.
3. Deactivate members who have moved away.
4. Change the SMTP password if anyone who knew it has left.
5. Share a one-page ministry report with your pastor: sign-ups, completions, and stories.

QUICK CHECK

- [ ] I can explain to members what admins can and can’t see.
- [ ] Our group follows the privacy practices above.
- [ ] Our annual review is on the calendar.

PART 3

The Part of Tens

What the most fruitful Ledgerly groups have in common.

CHAPTER 8

Ten Steps to a Thriving Money Ministry

1. **Get the pastor on board**
   A single sermon mention doubles sign-ups.
2. **Say “free” every time**
   It removes the first objection before anyone raises it.
3. **Start with leaders**
   People follow leaders who’ve done it themselves.
4. **Launch one class, not ten**
   A full room beats five half-empty ones.
5. **Print the workbooks**
   Paper in hand means people finish.
6. **Offer a family track**
   Kids and Teens courses bring whole families in.
7. **Follow up personally**
   A note from a leader beats any reminder email.
8. **Tell stories**
   With permission, share one changed life each quarter.
9. **Run it every season**
   Fall, winter, and spring cohorts become a rhythm.
10. **Keep two admins**
    Continuity protects the ministry.

APPENDIX A

Admin Checklists

Launch checklist

- Group name, logo, and colors saved
- Outgoing email tested
- Second admin in place
- Leader invite code (with expiry) created
- Leaders piloted a course
- Launch invite code created with a label
- Bulletin, slides, and announcement ready (with “free”)
- First cohort created
- Workbooks printed for the first class

Weekly

- Glance at the dashboard and usage
- Check the email log if anyone reports missing emails
- Welcome new members

Monthly

- Review Reports
- Follow up with registered-but-inactive members
- Share one number and one story with your pastor

Each season

- Plan the next cohorts
- Retire old invite codes
- Deactivate members who have left

APPENDIX B

Glossary

Active user
A member who used the platform during the period shown.

Admin
A group administrator who manages members, courses, cohorts, and settings.

Bulk upload
Adding many members at once from CSV or JSON.

Cohort
A group taking one course together on a schedule.

Completion rate
Completed enrollments as a share of all enrollments.

Course bundle
A JSON file containing a course, its lessons, and optional branding.

Deactivate
Block sign-in while keeping the account and its data.

Invite code
A code members enter to join your group on Ledgerly.

Publish
Make a course visible in members’ catalog.

SMTP
The settings your group’s email provider uses to send mail.

APPENDIX C

Getting Help

- **The Ledgerly team** — through *ledgerly.app/contact.html* for roles, cohort setup, and anything the admin screens don’t cover yet.
- **The Ledgerly User Guide** — share it with every new member.
- **The Student Guide** and **Instructor Guide** — for your members and class leaders.
- **The Groups page** — *ledgerly.app/groups.html* has an overview you can share with your leadership team.

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CHEAT SHEET

Group Admin Quick Reference

Keep it in the group office.

INVITE

Invite Codes → **+ Generate Code**

Label · Max uses · Expires → 📋 copy

MEMBERS

Users → **+ Add User** or 📤 **Bulk Upload**

Change the default password!

Deactivate before you delete.

COURSES

Publish / Unpublish to show or hide.

Import/export bundles in **Settings**.

COHORTS

Course ID = number in ledgerly.app/courses/123

+ New Cohort → name, dates, status.

WATCH

Weekly: Dashboard + Usage

Monthly: Reports + follow-ups

SETTINGS

Branding · SMTP · **Send Test Email** · **Email Log** tab

GROUP MINISTRY / PLATFORM GUIDE

Open the door to financial discipleship

Most groups know their members struggle with money, but few have a plan to help. Ledgerly gives every group a complete biblical curriculum, private money tools, and group features for classes — all free.

This guide walks group administrators from registration to a thriving ministry: a 30-day launch plan, invite codes, members, courses, cohorts, reports, branding, email, and the stewardship of member trust.

Inside...

- ✓ A 30-day launch plan
- ✓ Invite codes and adding members
- ✓ Courses and course bundles
- ✓ Cohorts for classes and small groups
- ✓ Dashboard, usage, and reports
- ✓ Branding, email, and privacy

Ledgerly is a biblical financial literacy platform for groups and their members — 18 tracks, 277 courses, printable workbooks, money tools, and certificates. Written for group administrators, pastors, and ministry staff.

THE LEDGERLY PLATFORM GUIDE SERIES

1. Ledgerly User Guide
2. Ledgerly Student Guide
3. Ledgerly Instructor Guide
4. **Ledgerly Group Admin Guide**