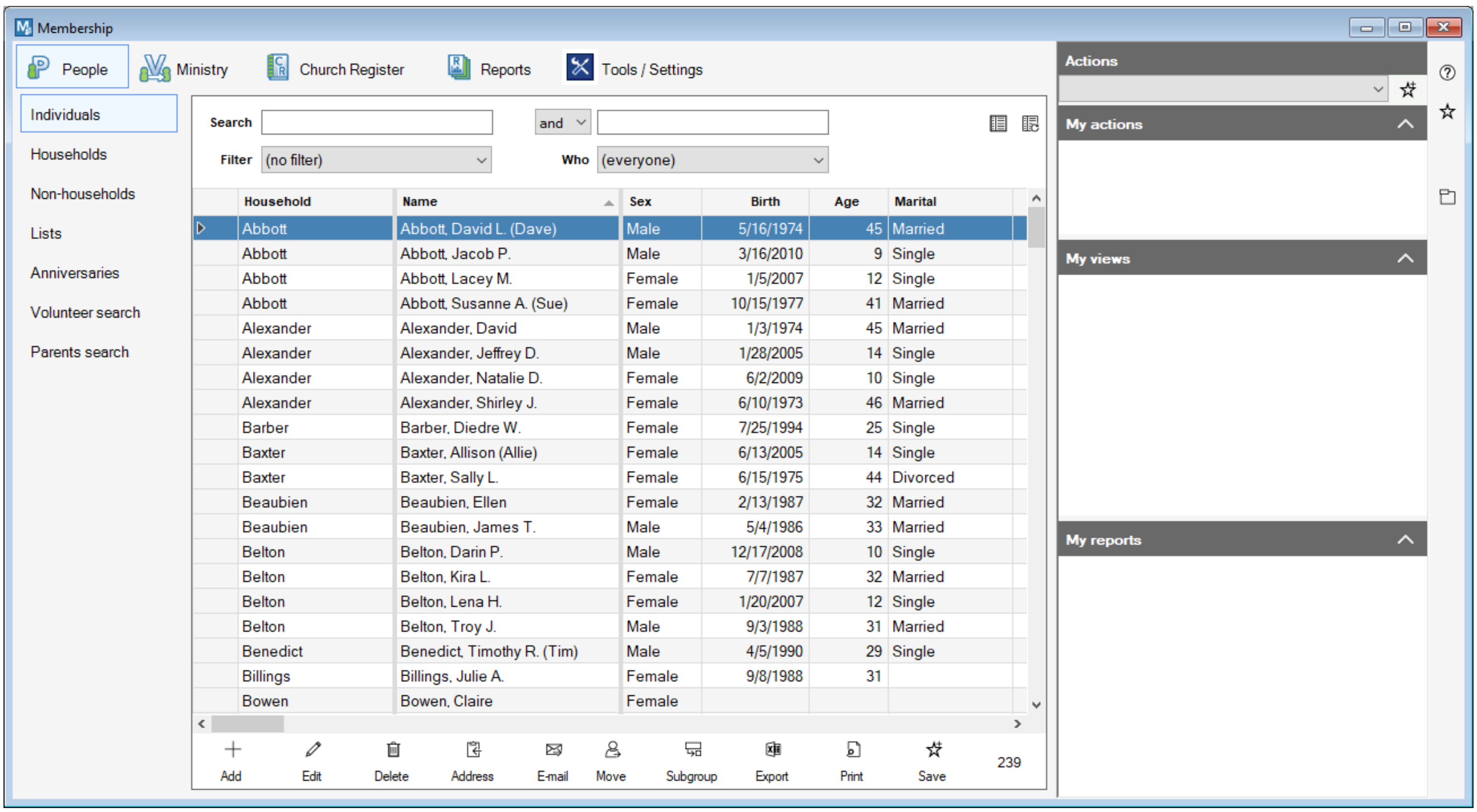
Introduction to Membership

Introduction to Membership Module

The Membership module allows you to store a variety of information about the members of your church. Common tasks include adding households and members, editing contact and demographic information, printing mailing labels, and creating church directories.



Backing up Your Database

The Backup Database utility is one of the most important utilities in Shepherd's Staff. When you make a backup, you essentially make a copy of your database at that moment in time. The backup compresses the database into a file and saves the file in the place you choose.

It is highly recommended that you back up your database routinely. It is also suggested that you keep one of these backups on a removable drive (e.g., USB drive, CD, Cloud) that you can take off-site. In the case of a disaster or computer failure, a copy of your data would be safe. In addition, users who have a support contract can upload a database to CPH. We will house the backup for a short period and you can request a copy at any time.

Churches can also archive backups on their drives. This is always a good idea because it gives you a history of backups to go through if you become aware of a problem that has existed prior to your most recent backup.

There are two backup utilities in Shepherd's Staff. The first is a database backup, which backs up the information regarding membership, attendance, contributions, and finances. This utility does not back up photos or attachments; these are backed up in the second utility, and this process is covered in the article "Backing Up Photos and Attachments."

Note: The space needed for the backup will be larger than the actual backup file. This is because several extra files are created and then deleted during the backup process.

Below are some terms that will come in handy when using the Backup Database utility.

» A location I choose—This option allows you to choose a location on your computer or network in which to save the backup file. During your first time backing up your database, this is the only option you will be able to choose.

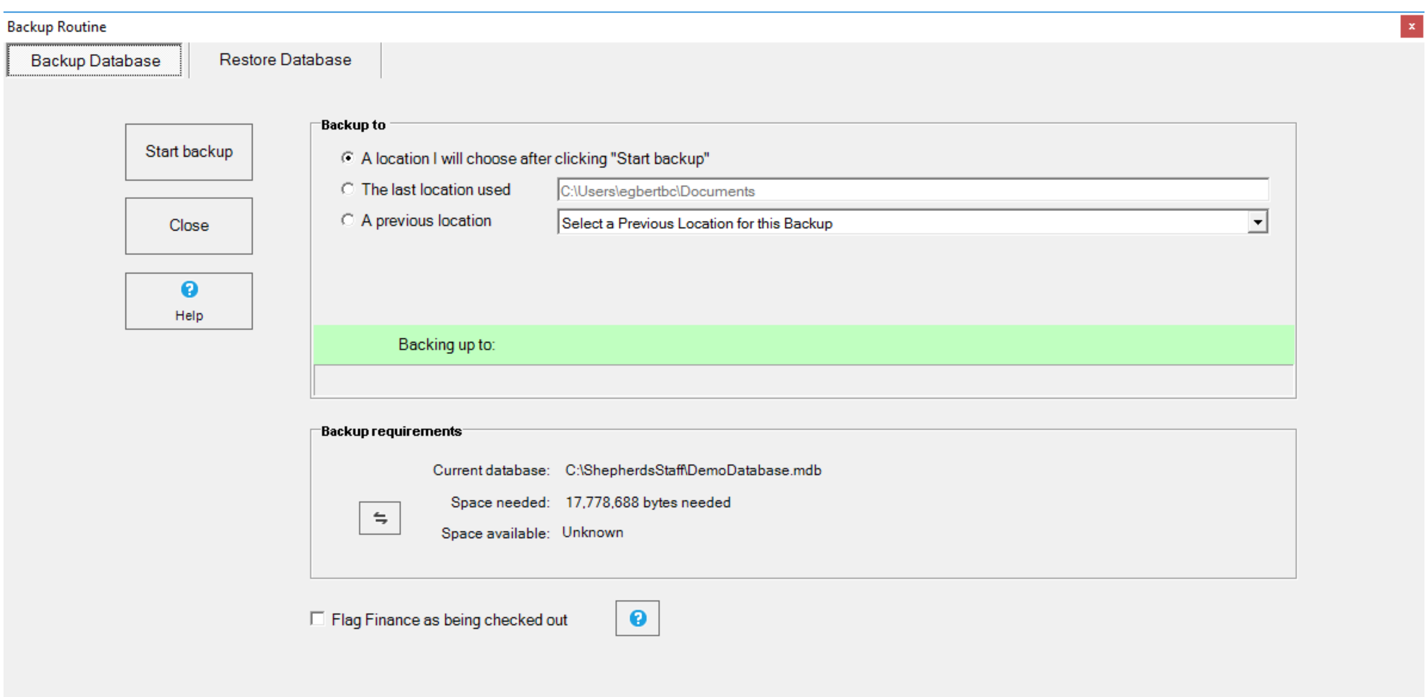
» The last location used—This option will automatically save a new backup in the location your most recent backup was saved.

» A previous location—This dropdown will list all the locations you have ever saved a backup file to.

Note: The name of the backup file cannot be completely changed. The name is how the Restore utility knows if a particular backup file is the correct one for your database. This is to prevent an override by an incorrect database if you are using multiple databases for multiple churches. However, you can add text to the beginning of the file name to help distinguish which backup is which.

Here is how to back up your database:

1. Close out of all modules in Shepherd's Staff.
2. On the main menu, select "Utilities".
3. Choose "Database backup and restore".
4. Choose the location in which to save the backup. During your first time backing up your database, you will only be able to select "A location I choose."
5. Optional: If you plan to make changes to the Finance module on an off-site computer and then apply those changes to this computer later, you may want to check the box next to "Flag Finance as being checked out". This will turn the Finance module red and will tell other users that any changes they make in Finance will be overwritten when the database is restored.
6. Click "Start backup".
7. Choose the location where you would like to save the backup, and click "Save".



Registering your Database

Registering your database is required if you plan to use WebTools or upload a backup to CTS for safekeeping. Doing this will also tell you if you have an active or expired support contract. It will also allow you to view free training videos for Shepherd's Staff as long as you have an active support contract.

Please note that an active support contract is also required to use WebTools and upload your backup to CTS.

» Account Key: This ID is unique to each customer and will replace the CTS Support ID. You will need your Account Number and Invoice Number to get this.

» Database Key: This identifies your specific database and helps ensure that your data is safe.

» CTS Support ID: This ID is filled in when you get your Account Key.

» Web Link: This unique URL is the site your WebTools will be at. The clipboard icon allows you to copy the URL so you can send it to someone else. The circular icon opens the page in your default web browser.

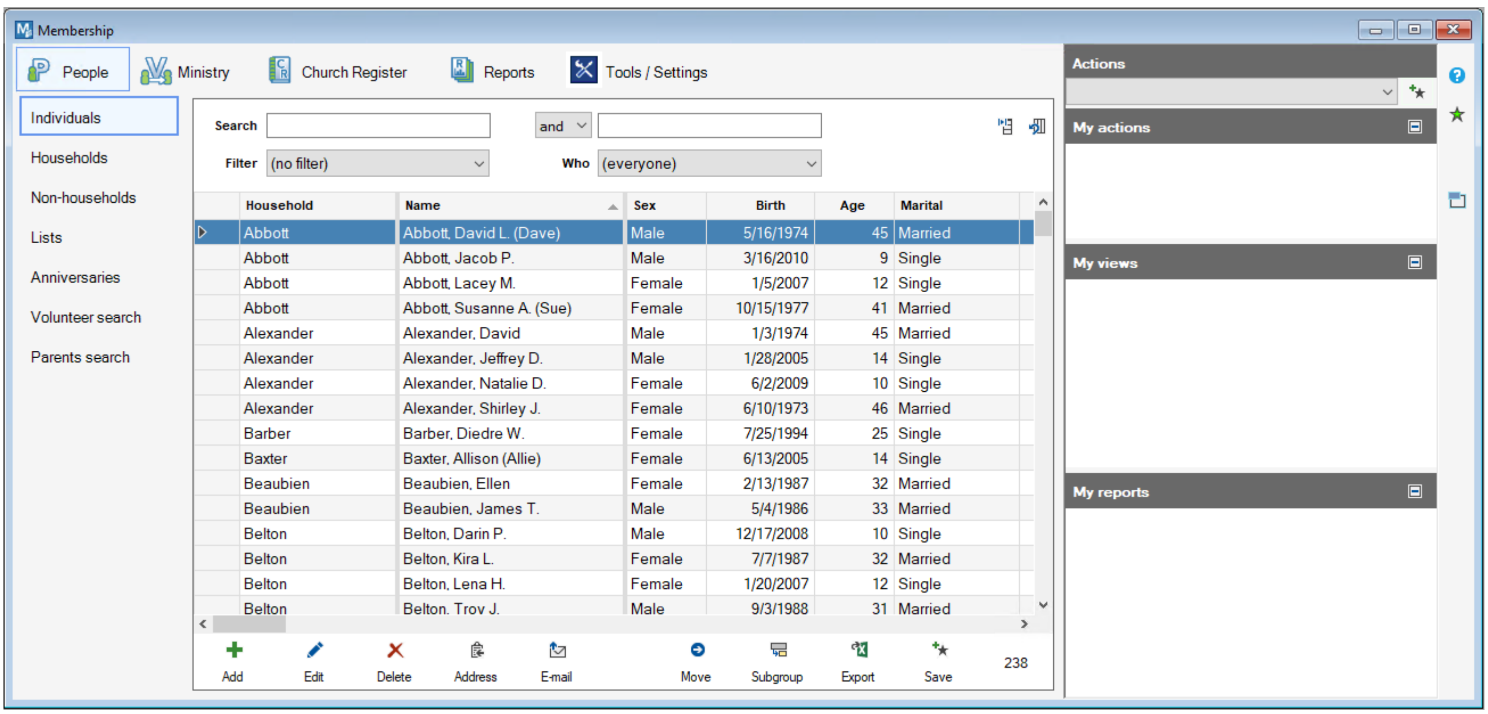
Here is how to register your database:

1. From the main menu, click the "Utilities" icon.
2. Click on "Settings".
3. Select the "Web" tab.
4. Click the "Get Key" button.
5. Enter your CTS Support Account Number and Invoice Number.
6. Click "Continue".

The Data Grid

Overview

Most views in each module contain a data grid. Almost every record you add to Shepherd's Staff® will be contained within a grid. Grids have special features that, when used, can greatly increase the user's proficiency and speed.



Key Parts

» Searches and Filters—Searches and filters can be used to narrow down search results or to search for a specific person or data.

» Autofit Columns and Reset—These two buttons in the upper right corner of the grid view will automatically adjust the column width to fit all data or reset the grid to default layout and size.

» Column Headers—Column headers come in two different types, bolded and italic. Bolded headers are for data that can be searched for. Italic headers are not used in searches.

» Sorting Columns—All columns can be sorted in ascending or descending order by clicking the header. Only one column can be sorted at a time, but it is usually assumed that when you sort by an event or date that the names will be sorted into alphabetical order.

» Moving Columns—Columns can be moved to the left or right to customize the grid. Click and drag the column header to move the column, then let go to put it in place. These columns will be saved in the new order and will appear in the same order each time you open the module.

» Resizing Columns—Columns can be resized to display more or less data. This can be done by moving the mouse between two column headers and then dragging once the resize cursor appears.

» Frozen Columns—In each data grid, the name column is listed on the far left and stays fixed as the grid is scrolled to the right or left. Unlike in other versions of Shepherd's Staff, this is the only column that can be frozen.

» Command Line—The command line contains all available options for the section that is presently being viewed. These options vary between sections, but all views can be exported to Excel, printed, and saved for future use, and each has a count of the total lines of data.

Exporting a Grid

Overview

Since all data grids contain rows and columns, all grids can be exported as an Excel document that can be opened in any spreadsheet application. By default, Shepherd's Staff® will attempt to open the document in Excel. However, in the main Shepherd's Staff settings under the locations tab (navigate to **Utilities** on the main menu > **Settings** > **Locations**), you will find a field to change the default spreadsheet application. The exported data grid will not have the columns ordered as they are in Shepherd's Staff. The data will be sorted by name only. You will need to edit the document to reorder, sort, or remove columns.

To export any view, click the **Export button** in the command line.

Search and Filter

Overview

Each data grid in Shepherd's Staff® has a search box and usually also a filter. The search box and filter can be used to narrow down the large amount of data that can appear in grids. In addition to standard text, search utilizes various special characters to create unique searches. After the search and filter are applied, the view can then be saved to create a report or to save it for future use.

> **Note**
>
> The search function only searches data that is in columns with bold headers.

The search and filter options can be found above the data grid. There are two search fields. With the use of special characters, the **and/or** function can be used in creative ways to find different data. For example, a user could type **>11/15/2017** in the first search box to find dates after November 15, 2017, then select **and** and enter **=Smith** in the second search box. This would search for records after November 15, 2017, for just people with the name "Smith".

These are the special characters you can use in searches:

» Equal (**=**)—Putting **=** before a search value causes the search to perform an exact match on the specified value. Example: **= Johnson**.

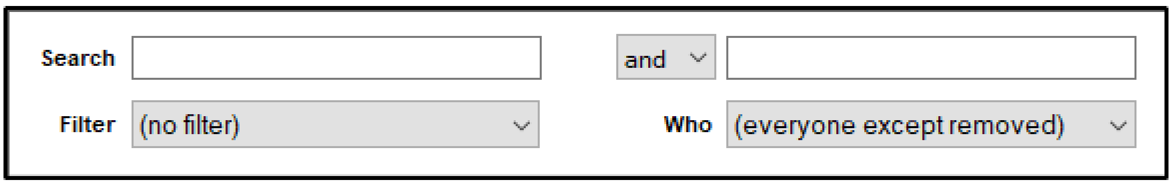
» Greater than (**>**)—Putting **>** before a search value searches for values greater than the one you type in. Example: **>12/01/2017** searches for dates after December 1, 2017.

» Less than (**<**)—Putting **<** before a search value searches for values less than the one you type in. Example: **<12/01/2017** searches for dates before December 1, 2017.

» Pipe (**| or shift +** \)—Lets you search for a range, e.g. between two values. Example: **04/01/2018 | 04/15/2018** searches date columns for dates between April 1 and April 15, 2018.

» At (@)—Prefixing a value with @ suspends the auto-data-type logic, so that you can search for a number or date stored in a text field. An example of this need is in the attendance **By person/week** grid, where using @ allows you to search for a portion of an attendance pattern.

Filters can also be applied with or without search. These filters change depending on the nature of the data that is being displayed. These drop-downs can be selected at any time to filter the data to match the selection. The most common filter is **Who**. This drop-down lists various groups of members, like current members, non-members, or people from various lists and subgroups.



> **Tip**
>
> Pressing F5 will clear all search fields and any filters

Here is how to use the search and filters:

1. Select the **tab** and **section** you want to search in.
2. Above the data chart, enter into the **search field** the information you would like to search for. Click the **red "x" icon** next to the search field to clear it.
3. Select any options from the various **filter drop-downs** to filter the information.
4. Click **save** in the command line to save the view for future use.

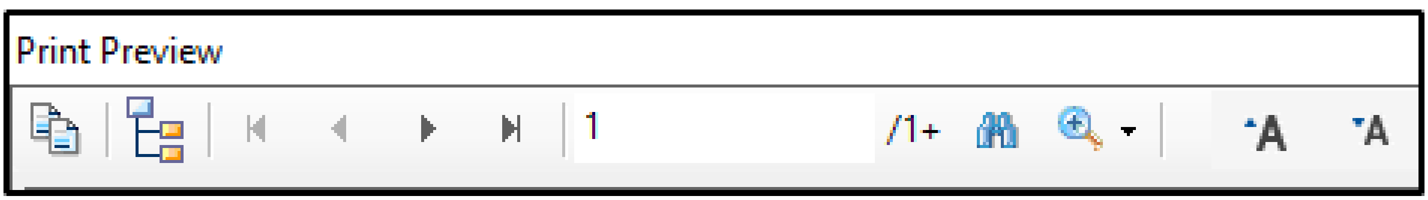
Print Preview

Overview

Similarly to how each data grid can be exported, each view and report can be printed or exported in a variety of different formats. Before a view is printed, though, a preview will display.

In the print preview, the top tool bar contains several options to help you navigate the preview before you print it. A tree is available on the left side of the screen to navigate to a specific section of the preview. **Arrows** allow you to cycle through the pages, the **binocular icon** can be used to search the document for specific data, and a **magnifying glass** can be used to zoom in and out to view the data better. Two buttons allow you to increase and decrease **font sizes**.

At the bottom of the print preview, you can **close**, **print**, and **export** the preview. All previews can be exported in a variety of different file types, including Word, RTF, and PDF. Word and RTF documents can be edited in any word processor application.



Here is how to use the print preview:

1. View any section or report.
2. Select the **Print icon**. In many views, you will need to select a **Group by** option, which orders the data by groups to create different types of reports.
3. In the preview that appears, use the **arrows** in the tool bar to cycle between pages.
4. Use the **icons to increase or decrease the font size** to make the preview comfortable to read.
5. If you want to export the report in a different format, select the drop-down menu in the lower right corner and **select the format**, then select **Export**.

6 To print the report, click **Print**

Database Conventions

A Shepherd's Staff database is built from MS Access. Data is entered into three different types of fields: option (drop lists), text, and date. Knowing how to use each type of field is valuable in becoming more familiar with Shepherd's Staff.

» Text Fields—These fields contain only the data that you type into them. Some examples of these fields would be Spouse's Name, Address, and Personal e-mail.

1. To add or delete: Simply type in or delete/backspace out.

» Option Fields—These fields deploy a drop-down box which gives you options to choose from. Examples of option fields are Marital Status, Ministry Group, and Received By, to name a few.

1. To add an item to an option field: Type in the item and hit TAB, or click inside the drop list, and the "Add/Remove Item from the list" button will appear to the left of the field. Type in the new option you want to add and press and click "Add"
2. To delete an item: Click inside the drop list, and the "Add/Remove Item from the list" button will appear to the left of the field. Click on this, select the option you want to delete and click "Remove"
3. To remove item from record but not delete from list: Click inside the field and press the backspace or delete key on your keyboard.

» Date Fields—These fields only hold a date. Examples of these fields would be Birthdate, Baptized Date, and Wedding Date.

1. To add or delete: You can type in a date or delete a date similar to a text field. You can also click the calendar icon to the right, and that can be used to select a date from a calendar.

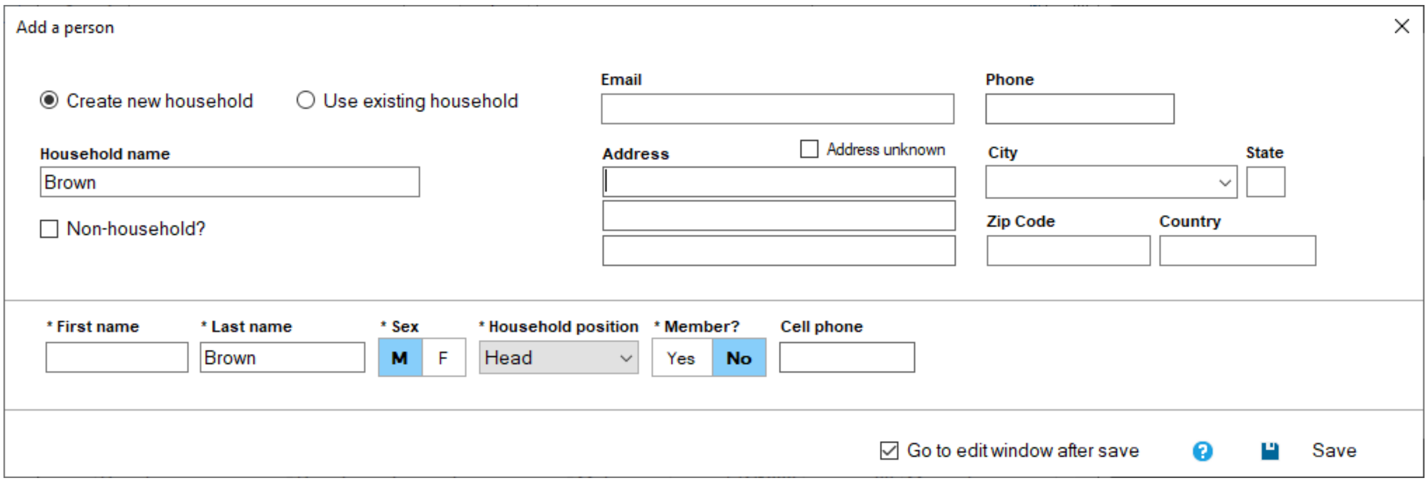
Note: Option, Text, or Date fields that have blue-colored font are required to be filled out.

» Using the Keyboard—The majority of functions can be accessed without using a mouse. Within Shepherd's Staff, each word that represents a function has an underlined letter (for example, Records).

1. Use the ALT button plus (+) the letter or number underlined, for example ALT+2 will access the Ministry tab

2. To navigate within Shepherd's Staff after using an ALT command, use TAB to go forward, SHIFT (+) TAB to go back. The directional buttons (left, right, up, down) can be used to navigate as well. ENTER is used for OK.

3. The Escape button (ESC) will always close an open window.



Consistent Data Entry

The power of Shepherd's Staff comes not only from its ability to keep and track data but also from the ability to find and report data. In order to get the most out of these abilities, it is imperative that you keep your data as consistent as possible. Let's look at a few examples to see this idea a little more clearly.

» Example 1: Say you have two members who transfer to another church. In this case we will say they transferred to an LCMS church. In order to show this in the software, we need to set the members Removed By statuses. For the first member, suppose we set his Removed By field to read "Transfer to LCMS" but the second member's status simply to read "Transfer LCMS." This might seem okay at the moment, but when we go to search or run a report for members that have been removed, a problem will arise. If we search for all Removed By statuses that are equal to "Transfer to LCMS," we will not pick up the member whose status reads "Transfer LCMS." This is because the search will match the exact text within that field. The best practice is to choose one wording and stick with it. If you decide you don't like the wording used in the past, you can use a utility like Mass Update to change all the records containing that text to your new choice.

» Example 2: Another task that shows the value of using consistent data conventions is printing out mailing labels. On every Household record there are fields for label name styles. These are text fields containing data that has been typed in by a user. So the Smith household might have a style 1 label that says "Mr. and Mrs. Smith" and the Jones household might have one that just says "Bob and Mary." Again, this could be fine until you run your mailing labels based on Label Name 1. At that point the Smith household label will look fine, but the Jones household label will not work because all it will say is "Bob and Mary" on the top line.

So by keeping your data consistent, you can see how it will save time down the line and also reduces confusion for volunteers and other employees that only use the software part of the time.

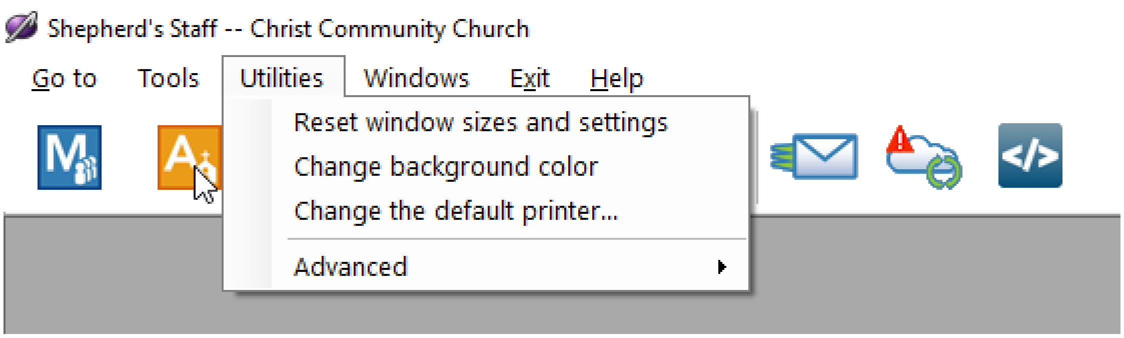
Tip: Making a list of these data conventions using a chart similar to the one below.

Location	Field	Always Use

Customizing Membership

Overview

Each module can be customized in minor ways in Shepherd’s Staff®. Many customizations are done automatically, and all are saved so they appear the same way every time you open the module. Below are some of the ways to customize your experience.



» Background Color—The background in any module can be set to any color you wish. In the specific module, select **Utilities** in the top navigation and then **Change background color**. A window will appear with some basic colors already selected. For more options, select **Define Custom Colors**. This will bring up a color picker, where you can pick any color.

» Column Order and Sizes—You can reorder and resize columns in every data grid to whatever configuration is most useful to you. This can be done by clicking a column header and dragging it to the spot you want. The columns will always be in the same order every time you open the module. These options can be reset in each view by selecting the **reset button** in the upper right corner of the view.

» Favorites—Each user can have a variety of favorites saved, like different views, reports, and even specific actions.

» Window Size and Locations—Shepherd’s Staff will remember where each window was last placed on the screen and how large the window was. This option can be reset under **Utilities** in each module or under **Utilities** > **Settings** in the main menu.

Dashboard

The Church Dashboard provides a quick snapshot of your Membership data. This includes information about activity among different groups of people, changes in membership, counts and listings of different people and households, age breakdowns of particular groups and member summary information per year.

The Church Dashboard for Membership contains tabs for five different views. Behavior, Changes, Counts, By Age and Member summary. Between these views, some common functions are shared.

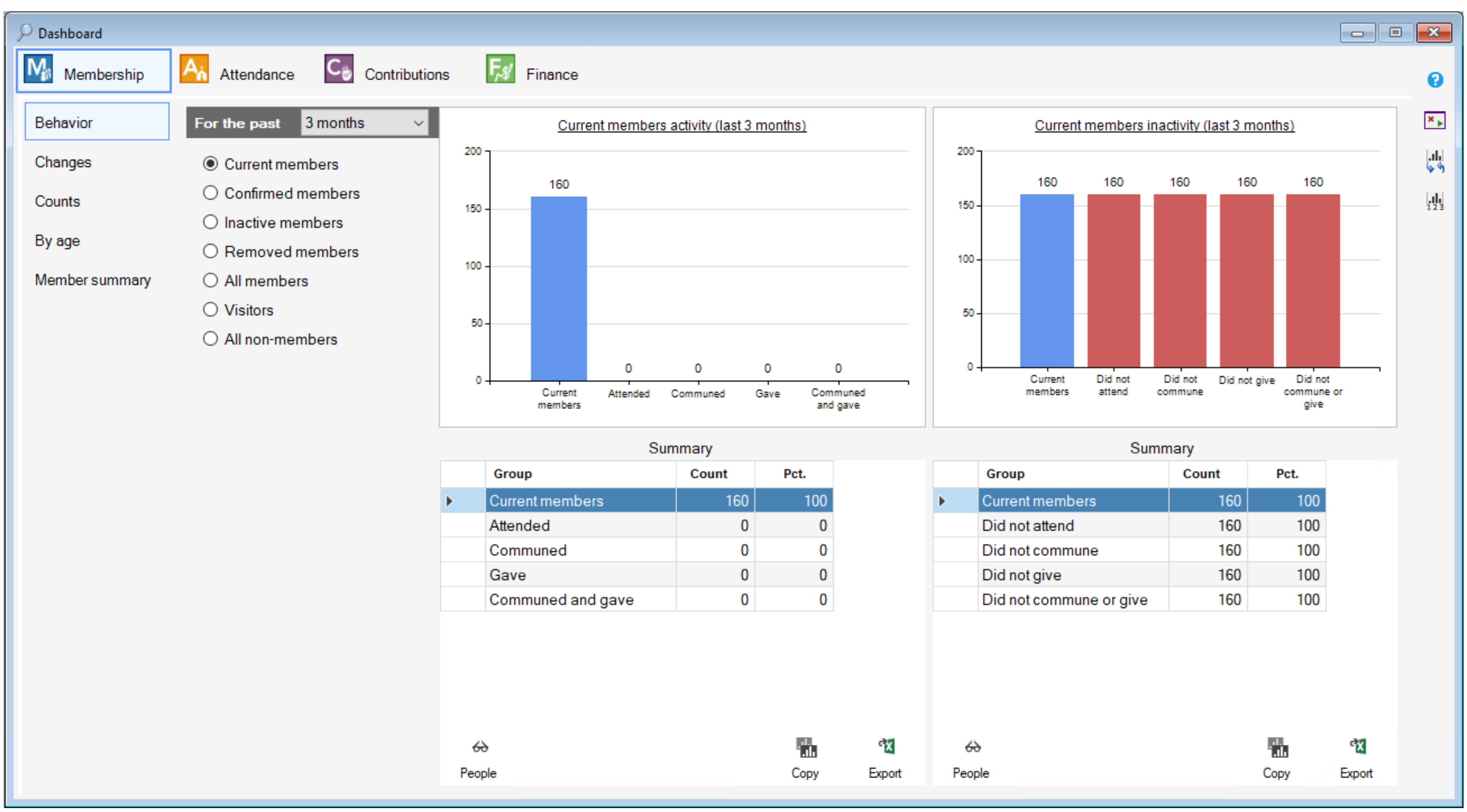
» People—Shows the specific people for the selected field within the selected section.

» View—Opens the person record of the selected person.

» Copy—Copies the graph within the selected section to the Windows clipboard.

» Export—Sends the data within the selected section to your spreadsheet program.

» Subgroup—Creates a Static subgroup from the people in the selected section.



Each tab provides different sets of data based on data from person, household, attendance and contributions data.

1. To access the Church Dashboard, in the Shepherd's Staff Central toolbar, click the Common Reports icon, and select Church Dashboard
2. The Behavior Tab is the first tab to appear, and this shows activity based on attendance and giving for a set time period for a specific group of people
3. The Changes tab shows changes in your Membership over a set period of time
4. The Counts tab provides the number and identity of people and households in specific groupings.
5. The By age tab provides an age range breakdown for specific groups of people within the Church
6. The Member summary tab shows the total number of people in specific categories of Membership over years with recorded data in Shepherd's Staff.

Favorites

Overview

The favorites panel allows you to save the actions, views and reports you use most frequently in Shepherd's Staff. This window can be displayed or hidden by clicking the **star icon** on the right-hand side of the window. The favorites are saved by each user, so different users can have different favorites. The favorites panel is broken up into four sections.

» Actions—A drop-down that lists the various actions that can be taken in the module. Selecting an option will change the **tab** and **section** to the corresponding view and open any windows so the action can be completed.

» My Actions—A list of actions that are saved by the user. You can save an action by selecting the action from the **Actions** drop-down and then clicking the **star icon** next to the drop-down.

» My Views—This lists the views that the user has saved. Saving a view will save all filters and searches made when the view was saved. Any view can be saved by clicking the **Save** button on the command line.

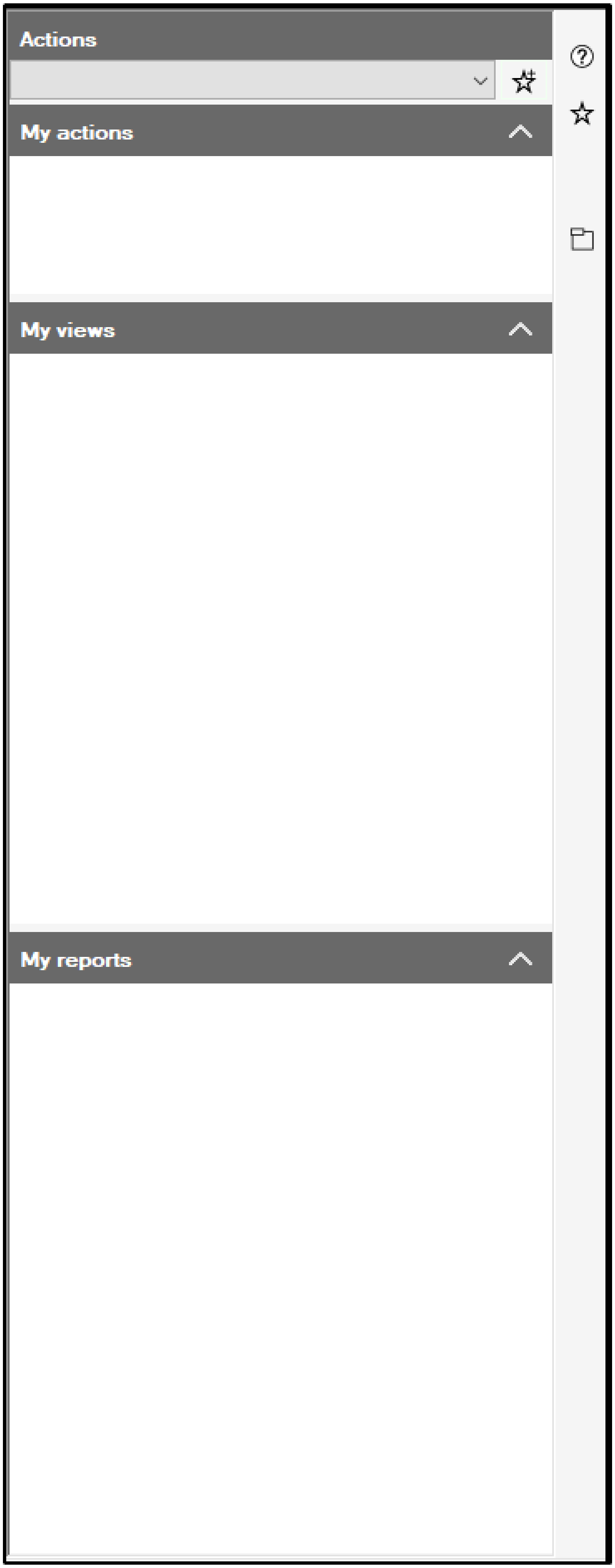
» My Reports—These are reports that have been previously saved. Each saved report will retain all the original settings and formatting options. Reports can be saved at any time by clicking the **Save** button in the lower right-hand corner of the module window.

A variety of options can be taken by right-clicking on a favorite. You can sort the favorites, rename them, and delete them. You also can reorder your favorites by dragging and dropping them into a new order. Sections of the favorites can be hidden by clicking the **minimize** icon in the section header.

Here is how to use favorites:

1. Select a view and click **save** in the command line.
2. **Name** and **save** the new view.

3. Repeat this process for any view or report.
4. Rename a favorite by **right-clicking** on it and selecting **rename**.
5. Delete a favorite by **right-clicking** on it and selecting **delete**.
6. Reorder your favorites by dragging them into a new order.


Actions
My actions
My views
My reports

Month at a Glance

In the Membership and Attendance modules, you can find a calendar icon in the tool bar at the top of the screen. Clicking this icon opens a reference calendar that can be used to quickly see upcoming or previous events that have been entered using the Scheduler module, Birthday and Wedding Anniversaries and tasks that are on your To-Do List.

The calendar view does not allow you to edit or change any information. (To edit an event, open the Scheduler module and edit the appropriate Event. In the case of a birthday or wedding, open the person record(s) and edit the appropriate field and in the case of a To-Do List task open the To-Do List and select and Edit the task you want to change)

Here is how to view the Month at a Glance:

1. In the Central Tool Bar, click the calendar button to launch the Month at a glance.
2. In the Month at a glance window, in the top right corner you can select which group of people you'd like to see for Birthdays and Wedding Anniversaries from the drop list.
3. The Left and Right buttons will move you back to a previous month or forward to the next month respectively. Click the checkmark button to return to your current month, where today's date will be highlighted.
4. The filter button will allow you to select what content to show on the calendar. Check off the options you would like to see to control what appears on the Month at a glance calendar.

Month at a Glance

September 2019

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 Kathy Martin's birthday 8:00am Traditional Worship 9:30am Sunday School 9:30am Adult Bible Study	2 Labor Day 10:00am Adult Bible Study	3 Troy Belton's birthday 8:00am Tuesday Morning Bible Study	4 7:00pm Women's Bible Study	5 6:00am Men's Bible Study 7:00pm Board of Finance	6 Tony Henry's birthday Norm Roberts' birthday 3:30pm Friday Lunch Group	7 5:30pm Saturday Worship 6:00pm Junior High Youth Bible Study
8 Julie Billings' birthday 8:00am Traditional Worship 9:30am Sunday School 9:30am Adult Bible Study	9 10:00am Adult Bible Study	10 8:00am Tuesday Morning Bible Study	11 7:00pm Women's Bible Study	12 6:00am Men's Bible Study	13 3:30pm Friday Lunch Group	14 5:30pm Saturday Worship 6:00pm Junior High Youth Bible Study
15 8:00am Traditional Worship 9:30am Adult Bible Study 9:30am Sunday School 11:00am Contemporary Worship	16 Rick Nelson's birthday Tim and Robin Wright's 23rd anniversary Julian and Blanca Vazquez's 23rd anniversary	17 8:00am Tuesday Morning Bible Study	18 7:00pm Women's Bible Study	19 6:00am Men's Bible Study	20 John Presley's birthday 3:30pm Friday Lunch Group	21 Rose Sanders' birthday Robin Vines' birthday 5:30pm Saturday Worship 6:00pm Junior High Youth
22 Ruth Morgan's birthday 8:00am Traditional Worship 9:30am Sunday School 9:30am Adult Bible Study	23 Ed Lyles' birthday 10:00am Adult Bible Study	24 8:00am Tuesday Morning Bible Study	25 7:00pm Women's Bible Study	26 6:00am Men's Bible Study	27 Kelly Peterson's birthday 3:30pm Friday Lunch Group	28 Travis and Sharon Peterson's 22nd anniversary 5:30pm Saturday Worship 6:00pm Junior High Youth
29 Thomas Watson's birthday 8:00am Traditional Worship 9:30am Sunday School 9:30am Adult Bible Study	30 James Simmons' birthday 10:00am Adult Bible Study	1 8:00am Tuesday Morning Bible Study	2 7:00pm Women's Bible Study	3 James Collins' birthday Rick and Sandra Nelson's 37th anniversary 6:00am Men's Bible Study	4 3:30pm Friday Lunch Group	5 5:30pm Saturday Worship 6:00pm Junior High Youth Bible Study
6 8:00am Traditional Worship 9:30am Adult Bible Study 9:30am Sunday School 11:00am Contemporary Worship	7 Aaron Morrison's birthday 10:00am Adult Bible Study	8 8:00am Tuesday Morning Bible Study	9 Eddie Watson's birthday James and Erin Collins' 14th anniversary Edgar and Anita Gomez's 14th anniversary	10 6:00am Men's Bible Study	11 Sasha Murray's birthday Howard Brown's birthday 3:30pm Friday Lunch Group	12 5:30pm Saturday Worship 6:00pm Junior High Youth Bible Study

To-Do List

The To-Do List is where church workers go to find their tasks. If you are the Office Manager, you can use the To-Do List to keep track of everyone's tasks.

The To-Do List is located on the Central Tool Bar in the Task Manager and To-Do List button. Click the button and select To-do List.

1. Click "Mark this Task Completed" button (The ✓ button) to launch the "Complete this task" window. When completing a task, you may select when the date was completed and who completed that task (selected from a list of Shepherds Staff users) or you may leave this information unknown, and leave a comment on the completion of the task. Click OK to save your selections
2. The "Print a To-Do List" button (The Printer button) lets you print a To-Do List report. Filter your task report by the task status or task name. You may select your desired time frame and several different options. You can also click the Export button (The button that looks like the Microsoft Excel icon) to export your To-Do List to a spreadsheet.
3. Using the "Add a one-time task" button (The + button) allows you to create a one-time task, set a due date, and assign a category and the person or people responsible for it.
4. Click the "Edit Task" button (The Pencil button) to update or correct a task. Changes to a task go into effect immediately when the OK button is clicked.
5. Use the "Delete this task" button (The trash can button) to permanently delete a task.
6. Click the "Task Manager" button (The clipboard button with the green checkmark) to open the Task Manager utility used for creating and managing task templates.
7. Click the "View Steps" button (The clipboard button) to see the steps needed to complete the selected task. Click the "Attachments" (The paper clip button) button to see any files or web links that have been attached to this task in the Documents/References tab of the task

You can also limit the information seen on the To-Do List by using any of the provided filters.

» Days Ahead—Shows tasks on your to-do list that are coming due within the selected number of days.

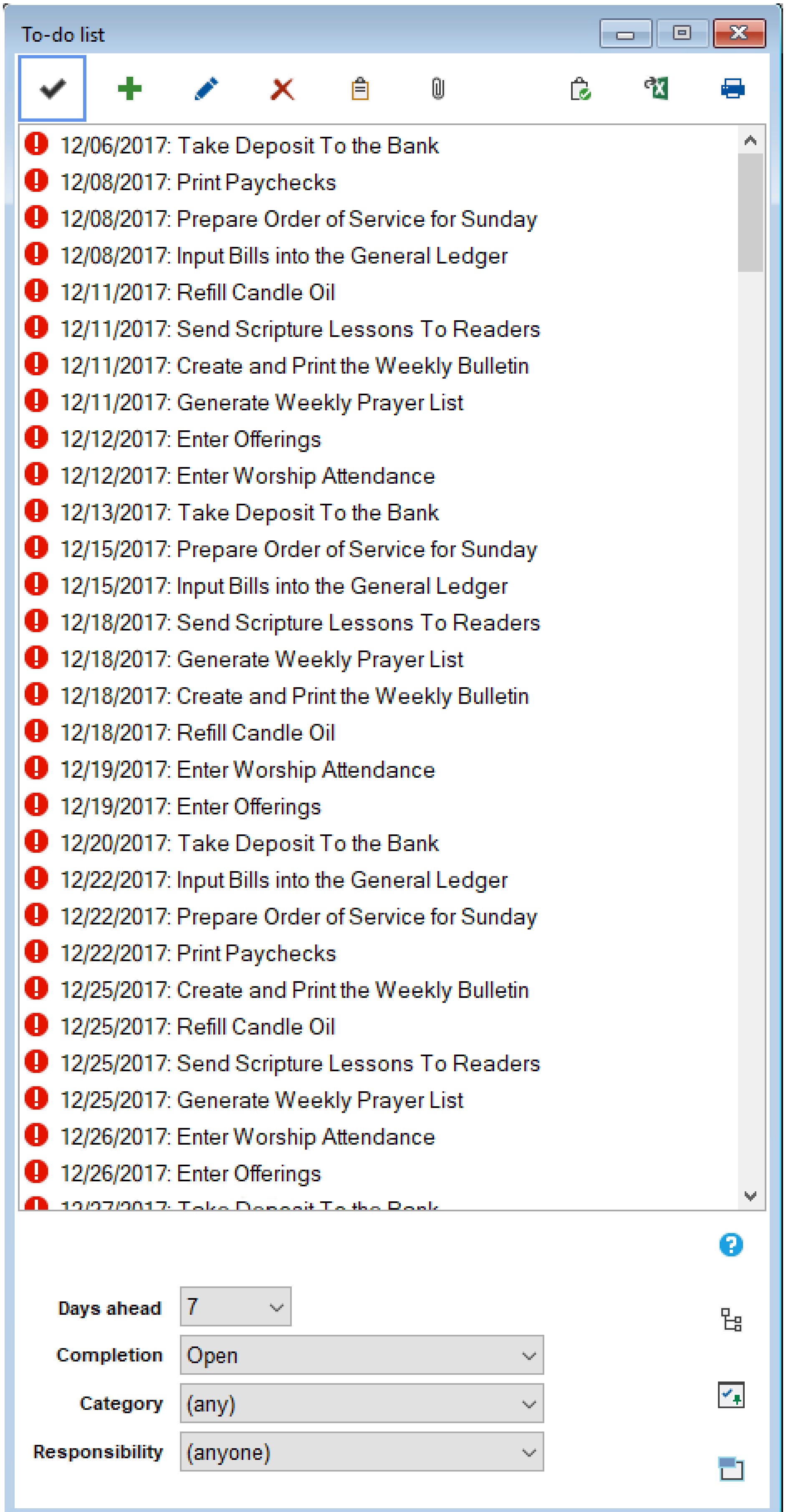
» Completion—Shows tasks on your to-do list with a specific completion status.

» Category—Allows you see only tasks of the selected category.

» Responsibility—Allows you to show tasks that are assigned to only the selected person.

You can also view tasks in a tree view, allowing you to sort tasks by different factors, including date, person, week, or category. To select the tree view, click the "Tree View" button.

Note: If you would prefer not to show the To-Do List upon launch, click the "Hide To-Do List button" at the bottom of the to do list.


To-do list
12/06/2017: Take Deposit To the Bank
12/08/2017: Print Paychecks
12/08/2017: Prepare Order of Service for Sunday
12/08/2017: Input Bills into the General Ledger
12/11/2017: Refill Candle Oil
12/11/2017: Send Scripture Lessons To Readers
12/11/2017: Create and Print the Weekly Bulletin
12/11/2017: Generate Weekly Prayer List
12/12/2017: Enter Offerings
12/12/2017: Enter Worship Attendance
12/13/2017: Take Deposit To the Bank
12/15/2017: Prepare Order of Service for Sunday
12/15/2017: Input Bills into the General Ledger
12/18/2017: Send Scripture Lessons To Readers
12/18/2017: Generate Weekly Prayer List
12/18/2017: Create and Print the Weekly Bulletin
12/18/2017: Refill Candle Oil
12/19/2017: Enter Worship Attendance
12/19/2017: Enter Offerings
12/20/2017: Take Deposit To the Bank
12/22/2017: Input Bills into the General Ledger
12/22/2017: Prepare Order of Service for Sunday
12/22/2017: Print Paychecks
12/25/2017: Create and Print the Weekly Bulletin
12/25/2017: Refill Candle Oil
12/25/2017: Send Scripture Lessons To Readers
12/25/2017: Generate Weekly Prayer List
12/26/2017: Enter Worship Attendance
12/26/2017: Enter Offerings
Days ahead
7
Completion
Open
Category
(any)
Responsibility
(anyone)

Task Manager

The Task Manager is a utility for creating task templates, automatically generating tasks from your templates, and completing tasks once they are done. You may also delete tasks that are no longer needed and export your task template list to Excel.

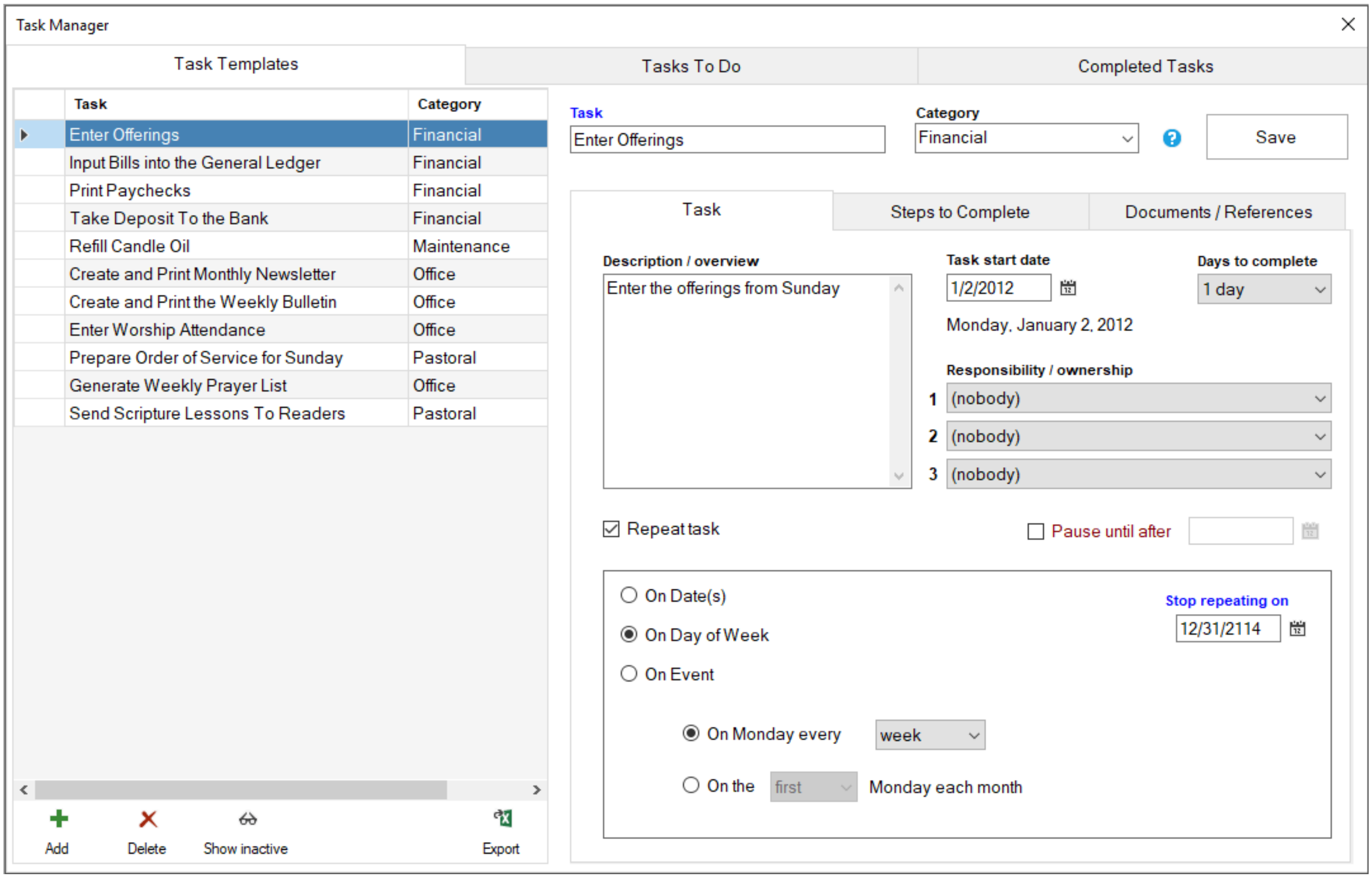
There are three major tabs inside the Task Manager:

» Task Templates—This tab shows your existing task templates and lets you add, edit, and delete templates.

» Tasks To Do—This tab lists all open/uncompleted, template-based tasks from everyone's to-do list. In addition to viewing existing tasks, you can generate more tasks, filter by responsibility, and export the list to Excel. Use the "Refresh To-do List" Button to erase and regenerate all uncompleted, non-action, template-based tasks.

» Completed Task—This tab lists all completed template-based tasks from everyone's to-do list. In addition to exporting the list to Excel, you can also filter by responsibility and "completed by."

Note: This utility is accessible from every module in Shepherd's Staff.


Task Manager
Task Templates
Tasks To Do
Completed Tasks
Task
Category
Enter Offerings | Financial
Input Bills into the General Ledger | Financial
Print Paychecks | Financial
Take Deposit To the Bank | Financial
Refill Candle Oil | Maintenance
Create and Print Monthly Newsletter | Office
Create and Print the Weekly Bulletin | Office
Enter Worship Attendance | Office
Prepare Order of Service for Sunday | Pastoral
Generate Weekly Prayer List | Office
Send Scripture Lessons To Readers | Pastoral
Add
Delete
Show inactive
Export
Task
Enter Offerings
Category
Financial
Save
Task
Steps to Complete
Documents / References
Description / overview
Enter the offerings from Sunday
Task start date
1/2/2012
Monday, January 2, 2012
Days to complete
1 day
Responsibility / ownership
1 (nobody)
2 (nobody)
3 (nobody)
Repeat task
Pause until after
On Date(s)
On Day of Week
On Event
Stop repeating on
12/31/2114
On Monday every
week
On the
first
Monday each month

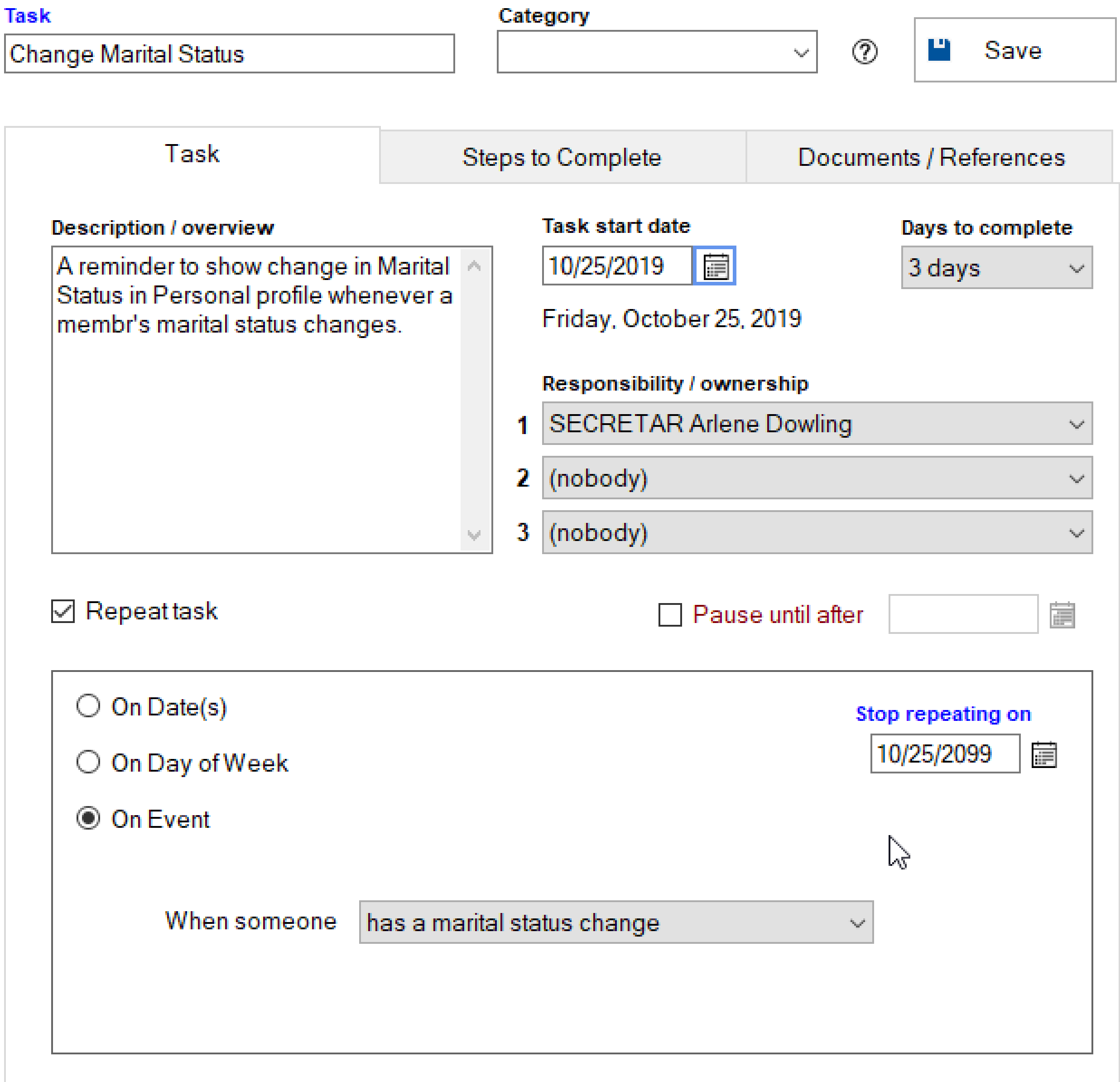
Action-Based Task

There are times when repeating a task based on a schedule will just not work. This is where action-based tasks come into play. These tasks generate automatically when a user makes a change in Shepherd’s Staff.

Examples of these actions include adding a visitor, marking someone as baptized, and changing an individual’s marital status.

1. Click Add to start the creating a new Task Template.
2. Enter the Task name (required), Category, and Description / overview.
3. Check the "Repeat task" box and select the "On Event" option, and choose the action that you want to trigger this task from the "When Someone" field
4. Assign responsibility or ownership to the task to ensure the task is completed in a timely manner. You can assign up to three people to a single task. The selectable people will be users of Shepherd's Staff.
5. You may also need to set a “Task start date,” set the “Days to complete” and enter a “Stop repeating on” date.
6. Make sure to click Save.

Note: If this task has a future start date, check the “Pause until after” checkbox and fill in the appropriate date.


Task
Change Marital Status
Category
Save
Task
Steps to Complete
Documents / References
Description / overview
A reminder to show change in Marital Status in Personal profile whenever a membr's marital status changes.
Task start date
10/25/2019
Friday, October 25, 2019
Days to complete
3 days
Responsibility / ownership
1 SECRETAR Arlene Dowling
2 (nobody)
3 (nobody)
Repeat task
Pause until after
On Date(s)
On Day of Week
On Event
Stop repeating on
10/25/2099
When someone
has a marital status change

Repeating Task

Templates are an essential part of the Task Manager. A task template is used to create repeating tasks and save all of your settings for later use. There are two types of repeating tasks: a Task based on a recurring schedule and a Task triggered by an Action. We suggest using the repeating task feature as much as possible.

The Task Templates tab contains three sub-tabs: Task, Steps to Complete, and Documents / References. Each sub-tab allows you to further customize your task templates.

» Task—The Task sub-tab holds all of the settings needed to create your repeating task template.

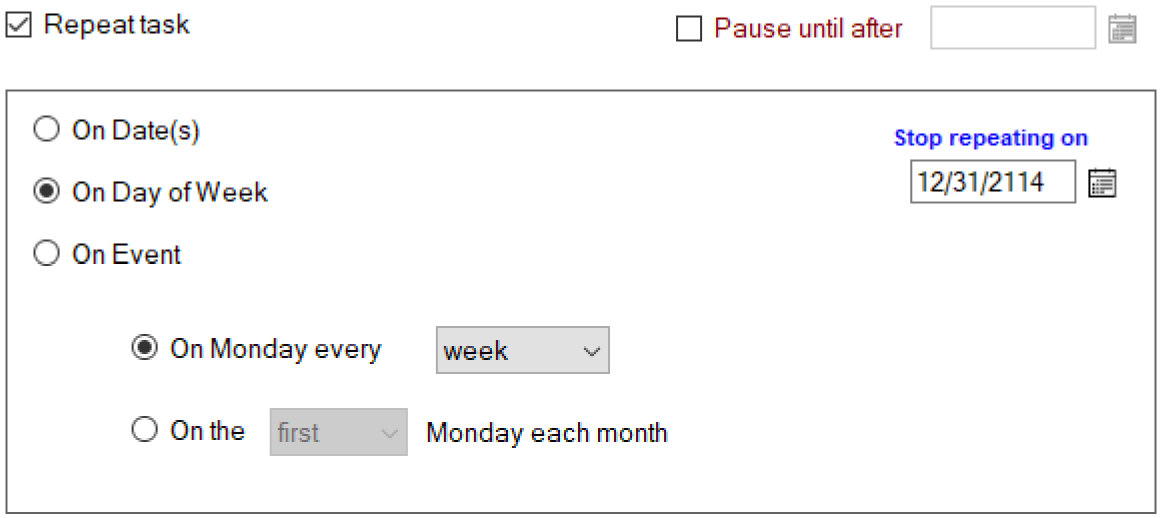
» Steps to Complete—Use this area to give your church workers or volunteers the instructions needed to complete a task. You may enter up to 50 steps.

» Documents / References—When you want to provide additional reference material to clarify the task at hand, use this sub-tab to attach supplementary information to the task template.

Note: The three sub-tabs will always relate directly to the currently selected task in your task list.

1. You can access the Task Manager from the Central Tool bar in the Membership or Attendance module. Click on the Task Manager and To-Do List icon and choose "Task Manager"
2. Click the Add button at the bottom of the window to add a new Task.
3. Enter the Task name (required), Category, and Description / overview.
4. Check the box to "Repeat task" and set the appropriate schedule for the task
5. Assign responsibility or ownership to these tasks to ensure they are completed in a timely manner. You can assign up to three people to a single task. The selectable people will be users of Shepherd's Staff.
6. You may also need to set a "Task start date," set the "Days to complete" and enter a "Stop repeating on" date.
7. Make sure to click Save.

Note: If this task has a future start date, check the "Pause until after" box and set the date this task will start on.



Adding Photos

Every Individual and Household record can have a photo added to it in Shepherd's Staff. These photos can be used in your Church Directory, for example, to generate a photo directory in Shepherd's Staff. This article walks through getting the photos added to your individuals and households.

1. In the membership module, under the People section, click on the individuals tab if you want to add a photo to an individual, or the households tab if you want to add a photo to a household. Then, double click on the Individual/Household you want to add the photo to.
2. Next to the photo box in the top right corner of the record, click the Camera icon to open the Photo manager
3. In the Photo manager window, click the File button if you want to browse your computer to find the photo you want to add. If you have copied the photo to your clipboard in Windows, click the Paste button to bring the photo in.
4. Once you have added the photo, in the Original box, you can click and drag to crop the photo. You can adjust the size of your box for cropping by adjusting the "Crop size" to the left of the Original photo. What you have cropped will be represented in the Large and Small photo boxes.
5. Select what size photo you want to use for this record in the "Default image size" field.
6. Click the Get button to bring in an automatic photo description. For an individual, it will just be that person's name For a household, it will be the household name, then the first names of each person in the family, in the order of Head of Household, Spouse, then Children.
7. Fill in the Date taken field with the date this photo was taken. This is useful information to have to be able to review when it might be time to get a new photo of a person or family.
8. If you need to remove a photo from a record, click the "Delete" button. This will remove the photo from the record.

Setting up Email

Sending emails in Shepherd's Staff requires that you have an email client outside of Shepherd's Staff that you would like to use to send your emails. Examples of this are Outlook, Gmail, Yahoo or Zoho. Shepherd's Staff itself doesn't actually send your emails for you, but, it provides the email addresses you have in your database to your email client so your email client can send the emails.

You will also need to give a user access to Shepherd’s Staff email through the User Security utility. This access must be granted by your system administrator (logged in with “sysadmin”).

If you don’t have a system administrator or can’t log in using “sysadmin”, please contact Shepherd’s Staff Support at 1.800.346.6120 for assistance.

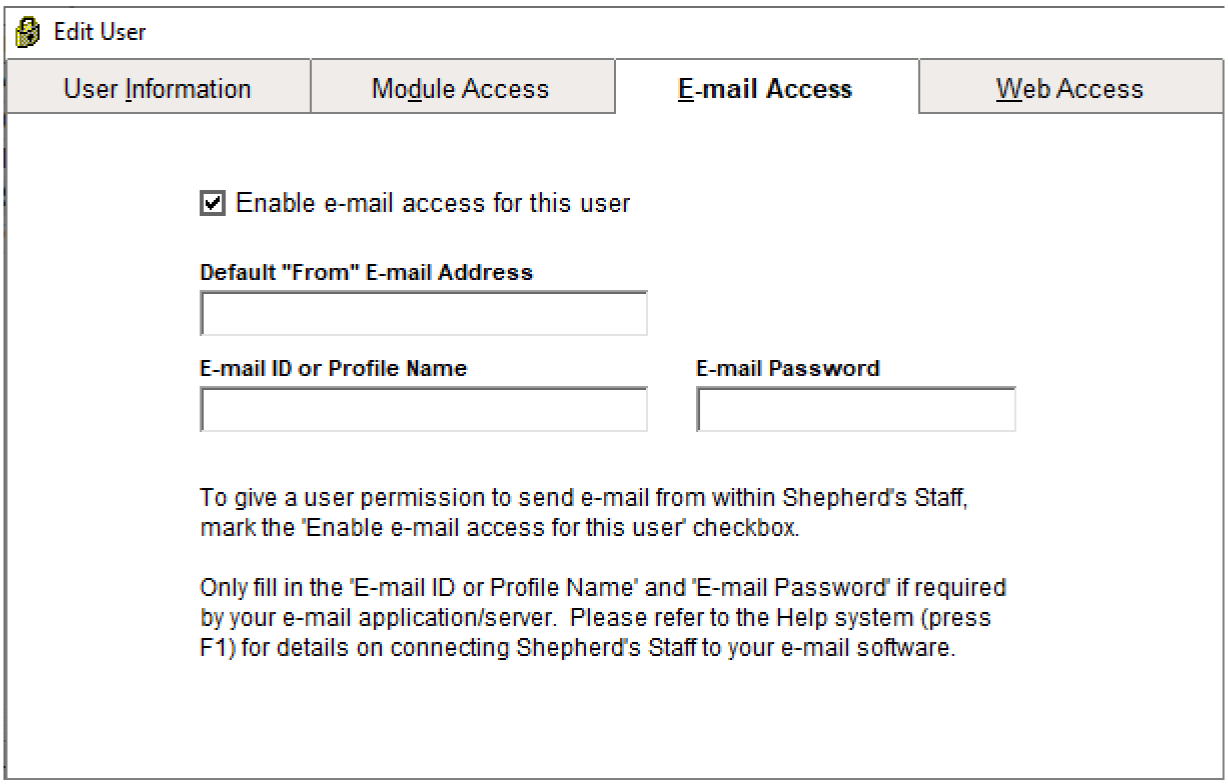
Here is how to change email access for a user:

1. On the Shepherd’s Staff home screen, click “Utilities” > “User security”.
2. Click “Add” or “Edit” to open a user window. The email access screen will look the same whether you are adding or editing a user.
3. Click the “E-mail Access” tab.
4. Check the box “Enable e-mail access for this user” to activate the person’s email.
5. Type the person’s email address in the “Default ‘From’ E-mail Address” field.
6. The “E-mail ID or Profile Name” and “Email Password” fields need to be filled only if they are required by your email program.
7. Click “OK” to save the changes to the user.

Once this has been completed, your selected user will have the ability on their login to access the email section of Shepherd's Staff, and if you're using Microsoft Outlook, you're now ready to send emails. However, if you want to send from another option, like Gmail, you will still need to set up your connection with your email client. Presently, the email services you can use are Gmail, Yahoo, Outlook.com (Hotmail, Live accounts) and Zoho.

Here's how to configure Shepherd's Staff to reach your email client:

1. In the Membership or Attendance module, click on the Send Email icon (The envelope icon) on the Shepherd's Staff Central Toolbar.
2. Click the gear icon on the right side of the window that appears next
3. Choose "Use SMTP Server".
4. Choose the email service you use in the "Choose SMTP Server" and click the Pencil Icon to enable the editing of data.
5. In the User ID field, enter your email address that you'll be sending from, and in the Password field, enter your email password.
6. When finished click the Save icon where the pencil was at previously. Click Select to save your selections.



Sending Emails

After you've set up your email settings in Shepherd's Staff, you're ready to send out emails. Sending out emails from Shepherd's Staff can be accomplished in many different places, such as the majority of views in the People section of Membership, The Inactivity, Follow-up and Deaths view, and directly from the Shepherd's Staff Central Toolbar. For any of the views, find the "Email" button (looks like an envelope with an arrow pointing to the right) and click on it to open the send emails window.

In this window, first you'll want to select who you'll be sending to. Some views you're coming from may already have this filled in, as you selected to email a specific person or household. However, if you need to add more to this list, or you're starting from scratch, you'll need to select who you're sending to:

1. Type in the email address you want to send to in the "To..." box. Otherwise, click "To..." to bring up the "Select Recipients" window.
2. In the "Who" field, select the group of people you want to be able to select from.
3. Select from the listed options to filter which people and emails you see in the "Unselected" box.
4. In the Unselected box, click on the person you want to add, and then press the Add button. If you want to select multiple people at once, hold down the CTRL key on your keyboard as you click on each person. To add all people in the Unselected box, click the "Add all" option. To search for a specific person, type in the person's name in the search box above the Unselected box and press the search button (Magnifying Glass)
5. To remove people from your selected box and click Remove. If you want to select multiple people at once, hold down the CTRL key on your keyboard as you click on each person. To remove all people from the Selected box, click "Remove all". to search for a specific person, type in the person's name in the search box above the Selected box and press the search button (Magnifying Glass)
6. Click Select to confirm your selections.

You can follow the same steps in the "CC..." and "BCC" boxes to set up a Carbon Copy or Blind Carbon Copy for your email.

Next, you'll need to fill in your message:

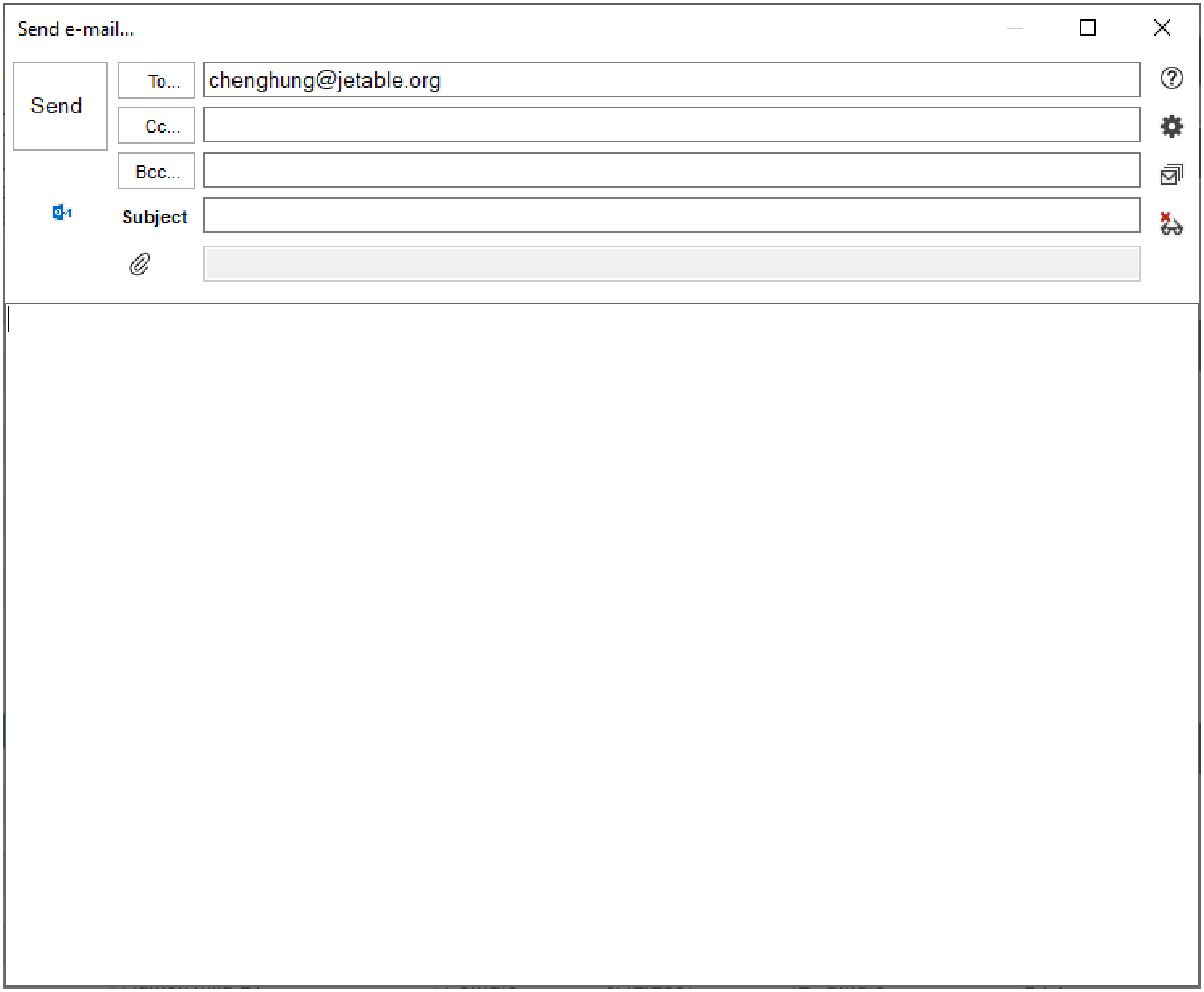
1. Fill in the Subject line of your Message in "Subject"

2. Click the Attachments button (Paper Clip) to open the Add Attachment(s) window. In this window, you can add attachments to your email. Click the add button (Paperclip with a green + sign) to open your file explorer. You can then browse your computer and select the file you want to add by double clicking on it. To remove an attachment, select it in the "Attachments selected window" and click the remove button (Paperclip with a red x) to remove the selected file. You can click the button with two red minus signs to remove all attached files
3. Click the Save icon to add your attachments to your email.
4. Type in your message in the message box and press Send to send your email to your email client. Within your email client, you will need to press the Send button to send the message.

Note: Most email services have restrictions on the number of email addresses and total file size of your attachments. While Shepherd's Staff will not restrict how many email addresses you include on an email message, or the size of file you choose to attach, your email service will automatically reject your message if you exceed these limits. Check with your email service provider for more details.

You may also want to create templates for messages that you plan to send out frequently. For this, we offer a message library.

1. Access the Message Library by pressing the button to the right of the BCC field with the multiple envelopes stacked on top of each other
2. Click the + sign in the next window to add a new message.
3. Type in the name of your message in the Name of Message field. When you save your message, this is what the message will show up as in the "Messages Available" field. Then, fill in the Subject and Message Text. When finished, click the save icon. This will add the message to the Messages Available field.
4. To delete a saved message, select it in the "Messages Available" field and click the delete icon (Trash Can) to delete the message.
5. After you have selected your message, click the box with the checkmark in it to use that message for your email message.


Send e-mail...
Send
To...
chenghung@jetable.org
Cc...
Bcc...
Subject

Setting up Texting

Shepherd's Staff can be set up to send out text messages, but it requires a bit of setup first. The first thing that is required to send text messages from Shepherd's Staff is the ability to send out emails from Shepherd's Staff. Once the email setup is complete, there is some extra information that needs to be filled in on each person that you want to send an email to, as Shepherd's Staff needs to know the cellular service provider for each person that you're sending a text message to. Follow the steps below to fill this information in:

1. In the People tab, under individuals, double click the person you need to add the cellular service provider to.
2. In the Contact tab, in the carrier field select the cellular service provider this person uses. All the major providers that Shepherd's Staff provides by default will work for sending text messages.
3. Click save to save your changes.

Sending Text Messages

After you've set up your texting information in Shepherd's Staff, you're ready to send out text messages. Sending out texts from Shepherd's Staff can be accomplished by clicking the send email button on the Shepherd's Staff Central Toolbar (Envelope with lines coming out of it). After you click this button, follow the steps below

1. Click the "To..." button and click the "Cell phones" button in the window that appears.
2. In the "Who" field, select the group of people you want to be able to select from.
3. Select from the listed options to filter which people and emails you see in the "Unselected" box.
4. In the Unselected box, click on the person you want to add, and then press the Add button. If you want to select multiple people at once, hold down the CTRL key on your keyboard as you click on each person. To add all people in the Unselected box, click the "Add all" option. To search for a specific person, type in the person's name in the search box above the Unselected box and press the search button (Magnifying Glass)
5. To remove people from your selected box and click Remove. If you want to select multiple people at once, hold down the CTRL key on your keyboard as you click on each person. To remove all people from the Selected box, click "Remove all". to search for a specific person, type in the person's name in the search box above the Selected box and press the search button (Magnifying Glass)
6. Click Select to confirm your selections.

Next, you'll need to fill in your message:

1. Fill in the Subject line of your Message in "Subject"
2. Click the Attachments button (Paper Clip) to open the Add Attachment(s) window. In this window, you can add attachments to your email. Click the add button (Paperclip with a green + sign) to open your file explorer. You can then browse your computer and select the file you want to add by double clicking on it. To remove an attachment, select it in the "Attachments selected window" and click the remove button (Paperclip with a red x) to remove the selected file. You can click the button with two red minus signs to remove all attached files
3. Click the Save icon to add your attachments to your email.
4. Type in your message in the message box and press Send to send your email to your email client. Within your email client, you will need to press the Send button to send the message.

Note: Most email services have restrictions on the number of email addresses and total file size of your attachments. While Shepherd's Staff will not restrict how many numbers you include on a text message, or the size of file you choose to attach, your email service will automatically reject your message if you exceed these limits. Check with your email service provider for more details.

You may also want to create templates for messages that you plan to send out frequently. For this, we offer a message library.

1. Access the Message Library by pressing the button to the right of the BCC field with the multiple envelopes stacked on top of each other
2. Click the + sign in the next window to add a new message.
3. Type in the name of your message in the Name of Message field. When you save your message, this is what the message will show up as in the "Messages Available" field. Then, fill in the Subject and Message Text. When finished, click the save icon. This will add the message to the Messages Available field.
4. To delete a saved message, select it in the "Messages Available" field and click the delete icon (Trash Can) to delete the message.
5. After you have selected your message, click the box with the checkmark in it to use that message for your text message.

MemberCaller

The Shepherd's Staff MemberCaller Interface / Utility allows you to send lists of phone numbers from Shepherd's Staff to the MemberCaller application.

Shepherd's Staff authenticates your account using the User Account Code. This is the user's account number with MemberCaller, and is provided to you when you sign up for your member caller account.

All phone numbers must have a 3-digit area code and a 7-digit phone number, otherwise they are ignored. So if someone doesn't get transferred, make sure he or she has a valid phone number.

Note: For security, the utility also automatically checks that the first five digits of the Account zip code match the first five digits of the zip code entered under the Main Menu Settings.

1. When you start the utility, it automatically goes out and gets your Account information from MemberCaller based on the User Account Code. If the specified User Account Code is wrong, then the Account information will be blank and you will not be able to sync with MemberCaller.
2. After the utility establishes a connection, you can start picking the lists you want to send.
3. To add a list, click the plus sign button to the right of the call lists.
4. Scroll through this list until you find the subgroup you want. Highlight it and click OK.
5. Repeat this process until you have all your lists added. You can add up to 10 subgroups.
6. If a Call List already exists in MemberCaller, its contents are replaced with the most recent phone numbers.
7. If you want to remove a list, simply click the red X next to the list.
8. When finished, click the Sync button to send the phone numbers for each list to MemberCaller.

Webtools Sync

Overview

Keeping your database synced with WebTools is important so your data is kept up to date. An icon in the navigation bar in the Membership module allows you to quickly sync WebTools at any time.

When you sync WebTools, data from your database is sent to a server. The data includes church name, church address, person name, event names and info, enrollees, and contributions information.

> **Note**
>
> Before you can sync WebTools, you must register your database and have a current support plan.

Key Parts

» **Sync button**—Clicking this button will sync all the information in your WebTools site with your Shepherd’s Staff database. This sync needs to be done only when you have new members, households, envelope numbers, events, or contributions information.

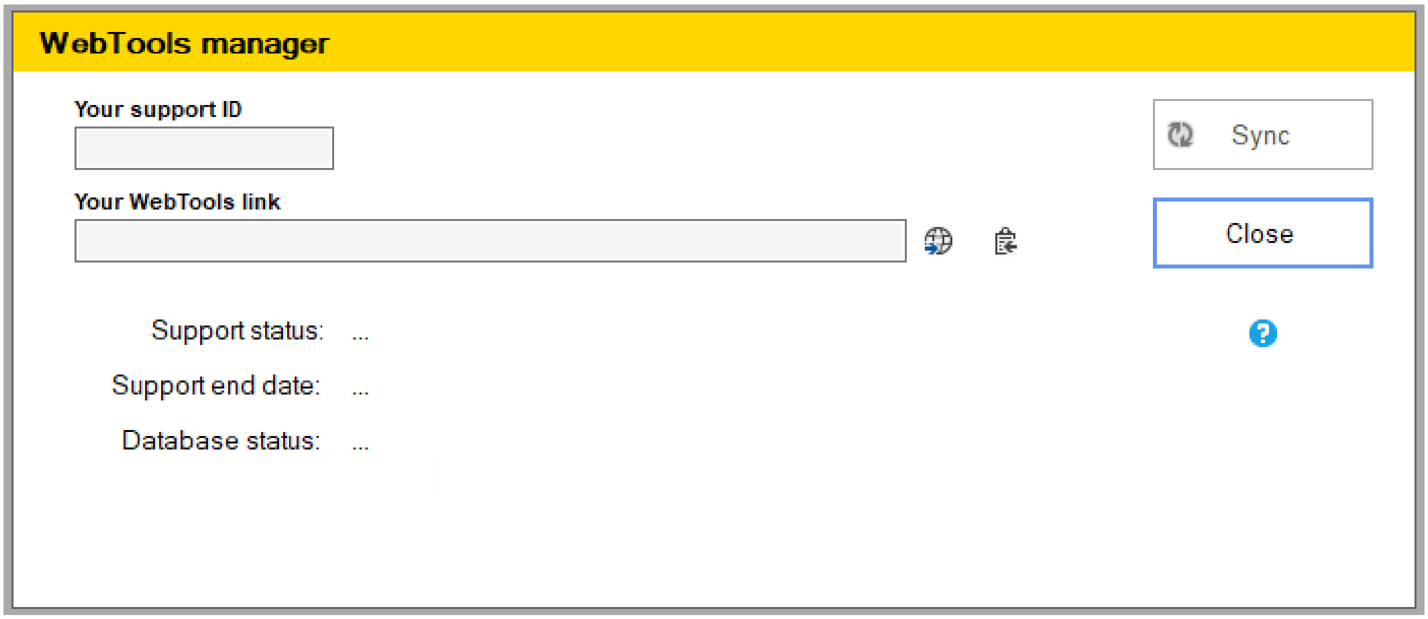
» **Website icon**—Clicking this will open your WebTools site in your default browser.

» **Copy URL icon**—Clicking this will copy your WebTools URL. You can then paste the URL to share it with others.

» Other information—Below the WebTools URL is information like **support status**, **support end date**, and **database status**. It’s normal for these fields to not display information. Before the sync is complete, Shepherd’s Staff confirms this information and displays it then.

Here is how to sync WebTools:

1. Open the Membership module.
2. Click the **WebTools icon** in the top navigation. This icon will have a red symbol added if you need to sync your WebTools site.
3. Click **Sync**. A screen will show up and disappear once the sync is complete.



Syncing with Church360° Unite

The Church360° Unite Utility sends certain Membership information to Church360° Unite, and receives back any changes made by church members via the church’s Church360° Unite website, so that your Shepherd’s Staff and Church360° Unite data remain synchronized.

To get your system set up to sync with Church360° Unite, complete the following steps.

1. Open Membership and click the Church360° Unite button (The Blue Square with the </> icon in it) on the Shepherd's Staff Central Toolbar.
2. Select the Settings tab.
3. Click on the pencil icon next to “Church360° Unite Account Token” and enter the number (cut and paste it) from the bottom of the Settings/Import from Shepherd’s Staff page in your Church360° Unite account.
4. Click the Save button (In the same place the pencil icon was, but now shows a floppy disk).
5. Click on the pencil icon next to the “Church360° Unite Subdomain” and enter your Unite subdomain and save it.
6. That’s it! You’re ready to sync Shepherd’s Staff with Church360° Unite.

After you've set up your Church360° Unite Sync, you are ready to actually sync your data with your Church360° Unite website. To do this, follow these steps:

1. Open Membership and click the Church360° Unite button (The Blue Square with the </> icon in it) on the Shepherd's Staff Central Toolbar.
2. If you want to send new data up to Church360°, make sure the "Send" checkbox is checked. This will send the data up for each person who has the "Show this person in Church360° Unite" box checked in the other tab of their individual record, if any changes to their contact information has been made since the last sync.
3. If you want to pull down any updates that have been made on Church360° Unite, make sure the "Receive" checkbox is checked. This will check each person in Church360° for changes in their contact information, and if a change is found, it will be pulled down when you sync your data, and you will have the opportunity to review the change and accept or reject it. If a change is rejected, then the data will be reverted on the Church360° Unite website to what Shepherd's Staff has for that person.

4. Click the Sync button to start the Sync process.

Note: If you want to send everyone's data who has the "Show this person in the Church360° Unite" regardless of changes, in the settings menu, check the "Send everyone who appears in Church360° Unite" box. The next time you sync, everyone who has this option selected will have their data sent up, regardless if there's changes or not. Be aware that this sync will likely take awhile, as you are sending everyone's data up.

Subgroups

Introduction to Subgroups

Overview

A Subgroup is a specific list of people that is generated by the user or assembled by common traits. Subgroups are very useful as filters for printing reports and generating statistics when only a specific list of people is needed. There are three types of Subgroups: Dynamic, Static and Combined.

» Dynamic Subgroups use a set of criteria that generates a group of people at the time the list is assembled. This means that these Subgroups are automatically updated as you update information in the database.

» Static Subgroups, on the other hand, are sets of people that are added to the Subgroup manually by the user. Therefore, all changes to Static Subgroups must be done manually as well.

» Combined Subgroups are a combination of two or more Dynamic and/or Static Subgroups.

Shepherd's Staff has provided many pre-made Subgroups that can be edited to fit your specific church's needs.

There are four tabs in the Subgroups view. Each tab offers different options regarding the Subgroup that is selected.

» Subgroups—This view lists all of the Subgroups that have been created. This is where you can add, edit, and delete Subgroups. Like in other views, columns can be sorted and rearranged, and data can be searched with the use of the two search fields.

» People—This tab displays everyone that is included in the Subgroup you have selected. Like in other views, columns can be sorted and rearranged, and data can be searched with the use of the two search fields.

» Reports/Tools—This view contains some reports that provide information on subgroups and the people within them.

» Security—This tab is available only to users with permission to edit Subgroups.

> **Note**
>
> Subgroups can be made in Membership, Attendance, and Contributions. Regardless of where they are made, they can be accessed in any of these modules.

Here is how to use Subgroups:

1. Subgroups can be accessed by clicking on the Subgroups button in the Central Toolbar (Button with the

   From this window, you can add, edit, and delete Subgroups.

3. Click **Count** to quickly see the number of people and households in the Subgroup.
4. Click **Print** to show a report of the people in the Subgroup and some basic information.
5. Click the **Export** button to export a list of all the Subgroups. If you want to export the list of people within a Subgroup, **select the Subgroup** and then click on the **People tab**, which will give you the export option you need.

Dynamic Subgroups

Overview

Dynamic Subgroups are based on a set of criteria for fields within your database. Because Dynamic Subgroups use data in Shepherd's Staff, the people in the list can change as the data changes. An example of this is a list of all active and confirmed members. A Subgroup like this will display all current active and confirmed members and not display those who do not meet those requirements. Once an active member is listed as "confirmed", they will appear in the Subgroup.

The first part of a Subgroup is the field. This is the piece of data you want to filter people by. Options include membership status, address, envelope number, pledge status, and hundreds more types of fields that are organized into various categories. The second part is an operator, which is a characteristic that can be applied to the data. These are things like "Equal to", "Greater than", "Between", and more. Lastly is the value. In many cases, the value is "Yes", but it can also be a date, number, or other type.

Note

Multiple traits can be added to a Subgroup, and the more traits you add, the smaller your group will become. It's important to think about the specific traits you need to filter by and not include any extra traits that might filter people out who should otherwise be in your group.

Below are a few examples of Dynamic Subgroups you can make:

» All active confirmed members

Category	Field	Operator	Value
Church	Member?	Equal to	Yes
Church	Confirmed?	Equal to	Yes
Church	Participation	Equal to	Active

» All December birthdays

Category	Field	Operator	Value
Personal	Birth Month	Equal to	December

In this case, you will select "December" from a drop-down when you select the month. But in the Subgroup summary, the value will be displayed as "12".

» Members between the ages of 25 and 45

Category	Field	Operator	Value
Church	Member?	Equal to	Yes
Personal	Age (as of today)	Between	25 and 45

Note

One thing that you will often want to do with your subgroups is to exclude any removed people. This is an easy trait to add to any subgroup. The field you would select is "Removed by" and the operator you would choose would be "is blank". This trait will make sure that only people whose "Removed by" field is empty.

Here is how to create a Dynamic Subgroup:

1. Open either the Membership, Attendance, or Contribution module.
2. Select the **Subgroup icon** in the main menu or toolbar.
3. Click **Add**.
4. Select **Dynamic** from the list of options.
5. Add a name for the Subgroup. A description and category are optional but can be helpful in managing the Subgroups.
6. Click **Add** to add a Subgroup trait. This will bring up a new window where the traits are selected.
7. Build the trait you want to add to the Subgroup by selecting a **Category**, then a **Field**, and finally an **Operator**. Lastly, enter the value from the **Find**
8. Click **Continue** to add the trait.
9. You can then add other traits, or edit or delete the ones you don't want anymore.
10. Click **Save** once you are done.

Static Subgroups

Overview

Static Subgroups are lists of people that the user creates manually. A Static Subgroup should be used when a list of names is needed for which no data is common in Shepherd’s Staff.

For example, the church has a softball team and labels are needed to send registration forms out. There is no field for “Softball Team” in Shepherd’s Staff, so a Dynamic Subgroup cannot be made. Creating a Static Subgroup for the softball team is the only way that list can be used in Reports (such as Labels, Address Report, etc.).

A Static Subgroup can also be created by using a Dynamic Subgroup as the basis and then subtracting individuals from it. You can do this by using the **Static** button while you have a Dynamic Subgroup highlighted. This creates a Static Subgroup based on the results of the Dynamic Subgroup at that time.

> **Note**
>
> Static Subgroups are simply lists of people and will never update automatically.

Here is how to create a Static Subgroup:

1. Open the Membership, or Attendance module and click on the Subgroups button in the Central Toolbar
2. To make a Static Subgroup from a Dynamic Subgroup, highlight the Dynamic Subgroup and click the **Static** button. If you just want to create a Static Subgroup from scratch, click the **Add** button and choose **Static**.
3. Add a name for the Subgroup. A description and category are optional but can be helpful in managing the Subgroups.
4. Select people’s names from the **Not in the subgroup** list, and click **Add**. If you need to remove people, select them from the **In the subgroup** list, and click **Remove**.
5. Click **Save** when you are done.

Combined Subgroups

Overview

Combined Subgroups are the product of two or more Dynamic and/or Static Subgroups added or subtracted together. These Subgroups are usually the right choice for the following:

» Subtractive Subgroup—You need exclusive information (in list A but not in list B). This is often the best way to find people who DID NOT "qualify" in your search. Start with all people who COULD qualify, subtract all people who DID qualify, and the remainder becomes all people who DIDN'T qualify.

» Additive Subgroup—You need inclusive information (in either list A or list B). It may help to think of this type as producing "or" results. This means that if you add two Subgroups, your results become anyone who was in one list OR the other list.

Here is how to create a combined Subgroup:

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. From the Subgroups window, click on Add and then select Combined.
3. Add a name for the Subgroup. A description and category are optional but can be helpful in managing the Subgroups.
4. Pick a Subgroup to start with from the drop-down. If this is a subtractive group, you will want to start with the list of people who COULD qualify. This is normally the larger of the groups. For the additive Subgroup, you can choose any of the lists to start off with.
5. Click the blue icon next to the field below to change it to a Plus (additive) or a Minus (subtractive).
6. Now choose the Subgroup you are subtracting away for a subtractive Subgroup, or the Subgroup you are adding to for an additive Subgroup. Once finished, click OK.
7. Click Save.

Subgroup List

The Subgroup List report provides a listing of all your subgroups, sorted by type (Dynamic, Static, Combined). This listing also includes the Category, Description, Last Used date, and which user used the subgroup last.

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. Click on the "Reports/Tools" tab in the subgroup window, and select "Subgroup List"
3. Click print to generate your report.

Subgroup Definitions

The Subgroup Definitions report will show you a listing of all your Dynamic or Combined subgroups and how those subgroups are built, showing each trait in the case of a Dynamic Subgroup, or each Subgroup in the case of a Combined Subgroup.

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. Click on the "Reports/Tools" tab in the Subgroups window, and select "Subgroup Definitions"
3. Select if you want to see your Dynamic or Combined subgroups.
4. Click print to generate your report.

Subgroups by Person

The Subgroups by Person report will let you pick a particular group, subgroup or list, and look at each individual in that list and provide you with each subgroup each person on that list is on. This can be handy especially when trying to ID what static subgroup people might be a part of, since they are not based on any criteria.

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. Click on the Reports/Tools in the Subgroup window.
3. In the Who field, select what group of people you want to run this report for.
4. Click print to generate your list of people, with the subgroups they belong to.

Subgroup Security Report

The Subgroup Security report provides a listing of all your subgroups, sorted by type (Dynamic, Static, Combined). This listing also provides information on the needed permission levels to be able to access each smart group, by showing if you need to be a supervisor for Membership, Attendance, or Contributions to access the subgroup, or if the subgroup has been restricted for use to specific User ID's. This report will also show the last time each subgroup was used and by which user.

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. Click on the "Reports/Tools" tab in the Subgroups window, and select "Subgroup Security"
3. Click print to generate your report.

Subgroup Security

Overview

The Security tab on the Subgroups window allows you to specify who can make use of any Subgroup on a case-by-case basis. Each Subgroup carries its own security settings and can be adjusted to control access based on a user's module access or user ID. Only users with "Supervisor" access to all modules can access the Security tab.

When the Security tab is selected, you can set the security controls for whatever Subgroup is currently highlighted on the Subgroups tab.

Because Subgroups use information located throughout the program, ensuring that the information is secure is an important aspect of the Subgroups section.

Subgroups can be created or viewed using only modules for which a user already has access.

Here is how to set up Subgroup Security:

1. Open the Membership, Attendance, or Contributions module and click on **Subgroups**.
2. **Highlight the Subgroup** for which you want to set the permissions.
3. Click the **Security tab**.
4. You can choose to limit access based on whether a user has supervisor access to a certain module, or you can choose only specific users who can use the Subgroup.
5. Once you are finished, click **Save**.

Subgroup Cleanup

The Subgroup Cleanup utility will allow you to find subgroups that are either empty or have not been used in over 18 months. This utility is handy for maintaining your subgroup list, and trimming out subgroups that are no longer useful to your church.

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. Click on the "Reports/Tools" tab in the Subgroups window, and select "Subgroup Cleanup"
3. Select if you want to look at your subgroups that are empty or unused, and click the "Start" button
4. You will be provided with a listing of your empty or unused subgroups. If you want more information on that subgroup, select it in the window, and click the "Details" button. This will show you with a window that provides the Name, Category, Description, Last Used Date and which user used the subgroup last.
5. If you would like to delete one of the subgroups on the list, select it and press Delete. This will delete the subgroup

Note: If a subgroup is a part of a combined subgroup, a window will appear when you attempt to delete the subgroup, letting you know what combined subgroup the subgroup you are trying to delete is in, and will not let you continue with the deletion

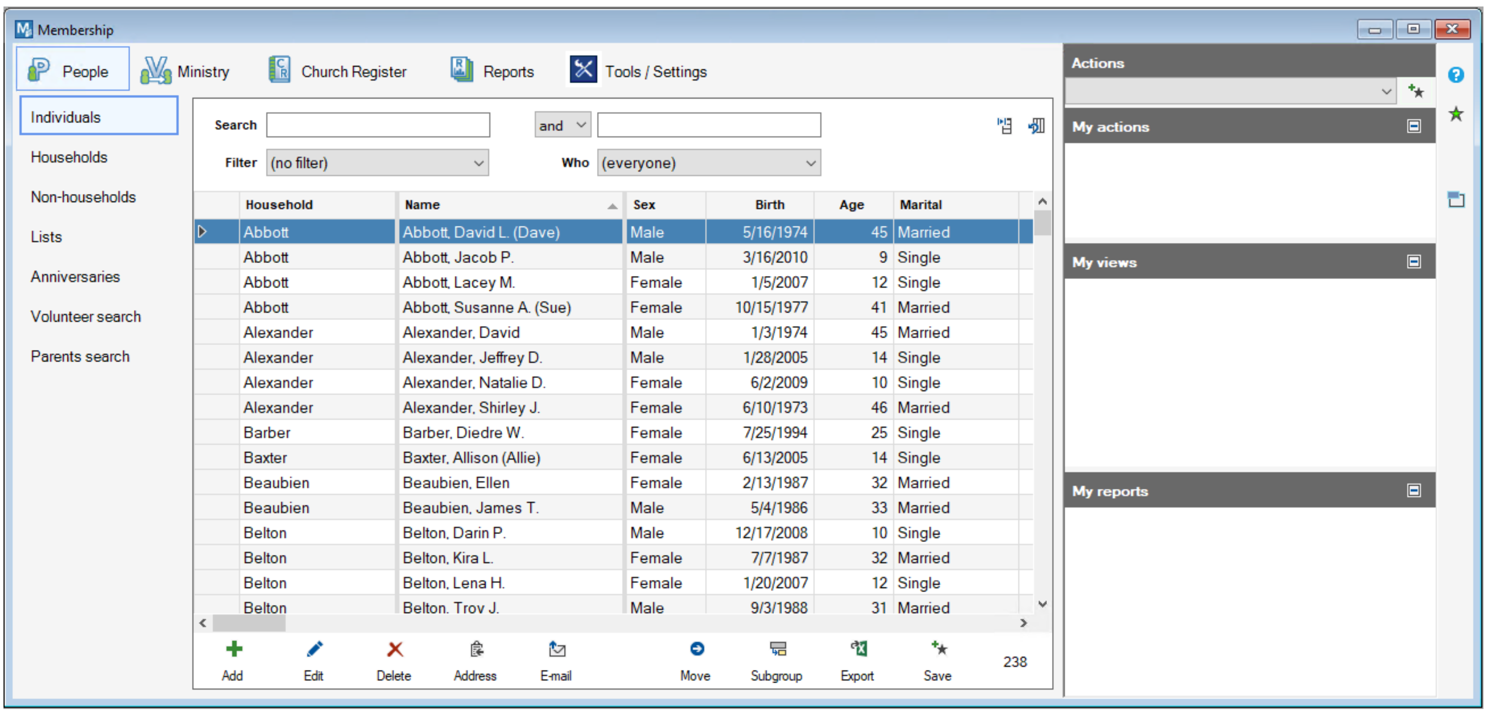
Individuals

The People Grid

The People Grid looks very similar to the Household Grid but keep in mind that the Household Grid contains only Household records. The People Grid on the other hand actually contains all Person records that are also grouped within each Household record.

From this grid, you can quickly information about a person, such as their birth date, membership status and Sunday School grade, just to name a few fields that are visible. The people grid can be searched by using the search bars at the top of the grid using the standard search conventions.

In addition to being able to add, edit and delete person records, you can also copy a person's address by selecting their person record and then clicking the "Address" button at the bottom of the grid. You can email someone in the same way, by clicking the "E-mail" button instead. You can also move a person to a new household by clicking the "Move" button.



Add Person

There are two different ways to add person records:

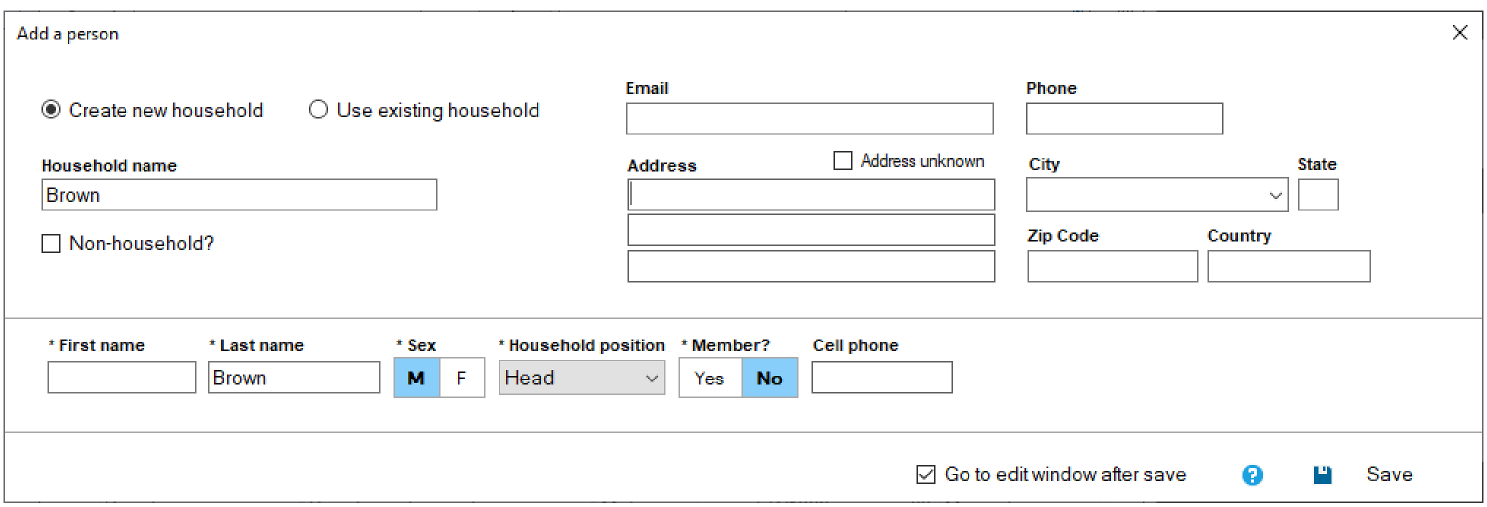
» Go to the Person Grid and click the Add button

» When you are first creating a household add in each person you want to include in the household

Since the second option is only available when you are first adding a household, if you need to add additional households after the fact, you would use the first option of adding a person from the person grid.

After you press add, you will be prompted to select which household a person belongs to. If adding a person to an existing household make sure the "Use existing household" is selected, and then select the household this person belongs to in the "Household name" field. Then, you will need to fill out each field with an asterisk next to the field name. After saving the record, you will have the opportunity to add more information.

1. Press the "Add" button on the people grid to add a new person. The "Use existing household" will be selected by default from this window.
2. Select the household the person you are adding belongs to in the "Household name" field
3. Fill in the First name, Last name, Sex, Household position, and Member? fields with the appropriate information. If you know the person's Cell phone number, you can fill that in the Cell phone field.
4. If you want to add additional information after inputting this information, make sure the "Go to edit window after save" checkbox is checked, and then click Save. However, you can leave this box unchecked if you have no additional information to add.

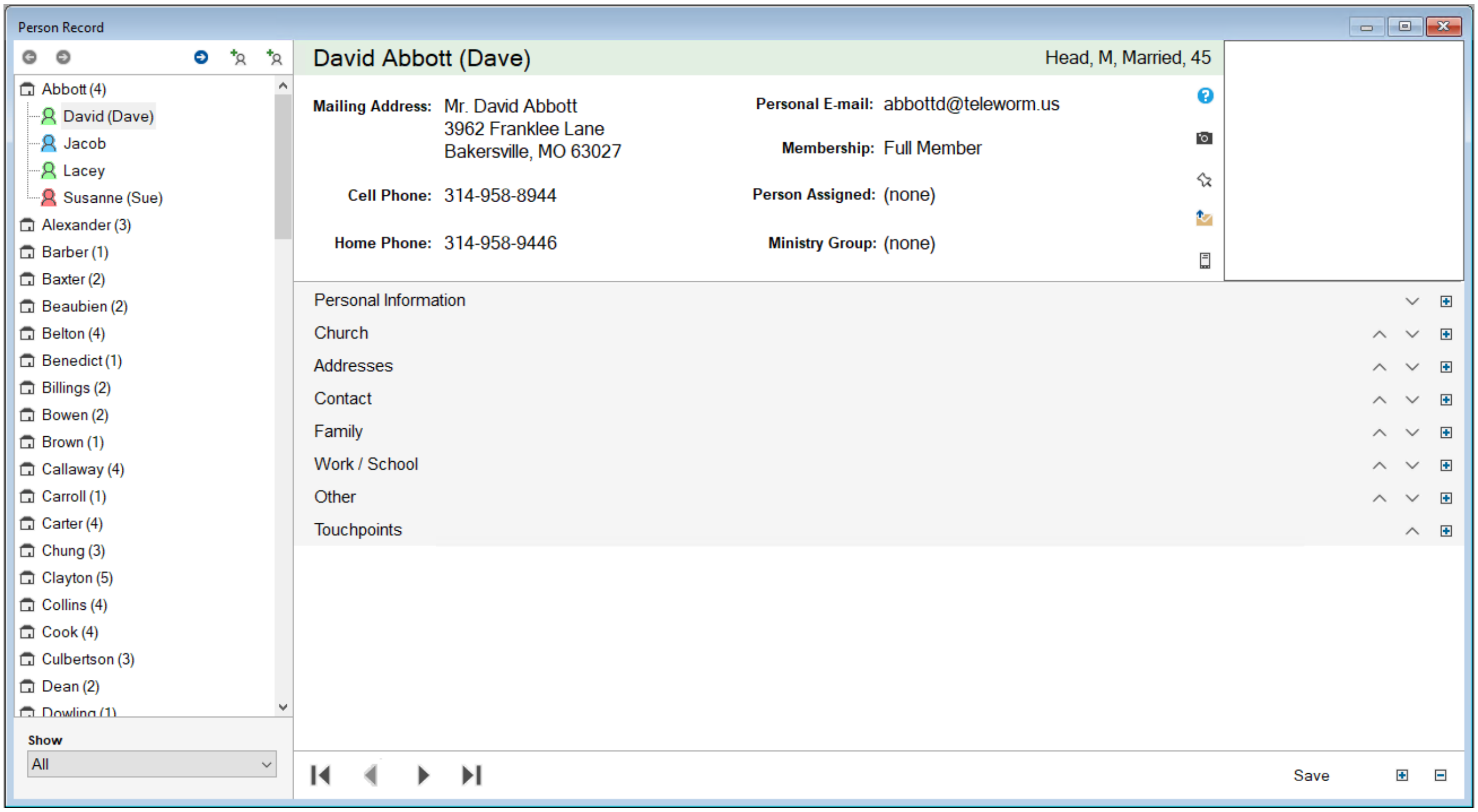


Person Records

The Person record contains several pieces of information about an individual, and is a good reference to get an overview of a person. A Person Record contains several tabs, each referencing different aspects of a person. These tabs include:

- Personal Information **-** This tab contains basic information about a person, such as their name, what household they belong to, birth, wedding and death dates.
- Church **-** This tab provides information about how this person relates to your church, with information about the person's membership status, and milestones, such as baptism, confirmation and first communion
- Address **-** This tab shows where this person lives, and gives the option for entering an alternate address from their household
- Contact **-** This tab shows the various ways a person can be contacted with spaces for different phone numbers and email addresses
- Family **-** This tab shows a person's relationship to others in their family, as well as listing the person's parents and number of children they have
- Work/School **-** This tab shows information on a person's education and occupation.
- Other **-** This tab contains custom fields where you can record information that Shepherd's Staff doesn't have fields for by default.
- Ministry **-** This tab shows all planned and completed touchpoints for the selected person record.

The Person Record also includes buttons at the very top for adding a Photo (Camera Icon), Notes (Thumbtack Icon), sending an Email (Envelope Icon) or sending a text message (Smartphone Icon). You can also re-arrange the order of the different tabs by clicking the box with an up arrow or box with a down arrow box near the top right of each tab to move them up or down in the order of tabs. You can also collapse or expand a tab by clicking the up arrow near the top right to collapse a tab, or the down arrow near the top right of the tab to expand it.


Person Record
Abbott (4)
David (Dave)
Jacob
Lacey
Susanne (Sue)
Alexander (3)
Barber (1)
Baxter (2)
Beaubien (2)
Belton (4)
Benedict (1)
Billings (2)
Bowen (2)
Brown (1)
Callaway (4)
Carroll (1)
Carter (4)
Chung (3)
Clayton (5)
Collins (4)
Cook (4)
Culbertson (3)
Dean (2)
Dowling (1)
Show
All
David Abbott (Dave)
Head, M, Married, 45
Mailing Address: Mr. David Abbott
3962 Franklee Lane
Bakersville, MO 63027
Cell Phone: 314-958-8944
Home Phone: 314-958-9446
Personal E-mail: abbottd@teleworm.us
Membership: Full Member
Person Assigned: (none)
Ministry Group: (none)
Personal Information
Church
Addresses
Contact
Family
Work / School
Other
Touchpoints
Save

Personal Information Tab

The Personal Information Tab contain basic information about an individual, such as their name, what household they belong to, birth and death date, marital status and wedding date, as well as other relevant personal information. Fields with an asterisk next to them are required by Shepherd's Staff. A field that you also will want to take a look at is the Household Position. This refers to a person's relationship to others within the household the options that you can select from are Head, Spouse, Child, Other and Deceased.

Life verse is a field where you can record an verse that is important to a person, such as a confirmation or baptismal verse. Changing the Household name field will change what household that individual is under.

Church Tab

The Church tab contains the person's church-related information including their membership, important dates, involvement within the church, and even the person's envelope number.

Note: The envelope number cannot be edited on this window, however, you can edit this field in the contribution module.

Some of these fields were already filled in if you followed the steps on Adding a Person.

If you mark someone as received by Baptism or Confirmation, Shepherd's Staff checks the appropriate box to the right (Baptized or Confirmed), saving you a click.

In addition, If you add a new person who was received by Baptism or Confirmation, the associated date will fill in with the date on which the person was received.

One important field you will want to keep up to date is the Participation field. We all want to know who is currently active in our church and this field is a way to track that.

The Section field is in reference to the Sunday School Grade. For example, if you have a large class of students that you have broke up into two separate classes for the same grade (For example, a class of 40 students split up into two classes of 20 students) then you could designate a section A and B, or 1 and 2 to indicate which class a person is in.

The Ministry Group and Person Assigned override fields allows you to have a person be assigned to a different person or ministry group than the rest of their household.

Click the Attendance Icon in this tab to view an attendance summary for the current year for the person you have selected, and you can click the AST icon to see the Activities, Skills and Training Classes the person is associated with.

Person Addresses Tab

The Person Addresses Tab shows the address that the person currently resides at. There are three address options that will appear in this window, Home Address, Person Away 1, and Person Away 2. The first address option, Home address, cannot be edited in this window, as it is inherited from the household that the person lives in. However, the Person away 1, and Person away 2 addresses can be used to indicate that a single person from a household is temporarily living at a different address, such as a child being away at college.

If you use a Person away option, and you want to make it be the active address for the person you're working with, make sure to fill in the "Begin use on" and "End use on" fields to indicate when the person will be away at this address. If this is an address that will be repeated on an annual basis, such as someone going south for the winter, then click the "Repeats annually" option, and when you reach the end of the date range, the dates will automatically be updated to the next year.

Person Contact Tab

The Person Contact Tab contains all the different ways you can contact a person. This includes phone numbers and email addresses. The Home Phone fields are inherited from the Household record. The Carrier field is used in conjunction with the Cell phone field. The Carrier field indicates which cell phone carrier a person uses. In order to send text messages from Shepherd's Staff, a person must have this field filled out with their carrier.

Family Tab

The Family tab contains information on the relationship the selected person has with the rest of their family, and the names of their parents. The family relationship field allows you to select how a person is connected to the rest of their family. You can also list the number of children this person has, and how many of this person's children are living.

Work/School Tab

As the title suggests, the Work / School tab keeps track of the person’s work and school information.

Many of these fields are option fields which means they use drop-down boxes to choose the data. If you need to add to these drop-down boxes, you can, but make sure you are keeping your data consistent and not giving too many options.

For example: If you have someone who is a Senior Accountant, it is recommended that you add them in as just an “Accountant.” The reason for this is down the road if you are looking for members of your church that know accounting and you search for the occupation title “Accountant” it will not find the person who is set to “Senior Accountant” and you will be missing one of your best candidates.

For a refresher on adding to and removing options from a drop-down box see the page on Database Conventions. Notice that while the work phone and email show on this page you cannot edit them here. You will need to edit those fields on the Contact tab of this Person record.

If a birthday of a child is keyed in, Shepherd’s Staff will automatically assign the child a Grade. The Grade is assigned by using the School Cut-off Date found in the Main Menu Utilities, under Settings and the Membership tab.

Person Other Tab

The Other tab contains the nine user-defined fields used for Person records. These fields can be renamed (customized) to measure personal information desired specifically by the church.

Shepherd's Staff contains a wealth of fields pertaining to an individual. Sometimes there is information that the church wants to put in, for example Emergency Contact or Health Concerns, that is not a part of the program. To remedy this, Shepherd's Staff contains fields that can be renamed or customized so this type of information can be keyed in. Likewise, since the information is in a field (as opposed to a Note), subgroups can be created from the information in the field.

In order to change the names of these fields you will need to go to Tools/Settings menu in Membership and edit the names in the Customize field names section

Ministry Tab

The Ministry Tab provides a listing of each touchpoint, planned and completed that are associated with an individual. This view provides information on when, what category of touchpoint it was/will be, who facilitated/will facilitate,the touchpoint and what method the touchpoint took/will take.

This tab also provides note field for Service Planning and Pastoral Care. Service planning is notes on details of a funeral service they or their family may want, such as specific music to be played, or certain verses to be read. Pastoral care is notes on any pastoral care the person received from the church.

Households

Follow

Households and People

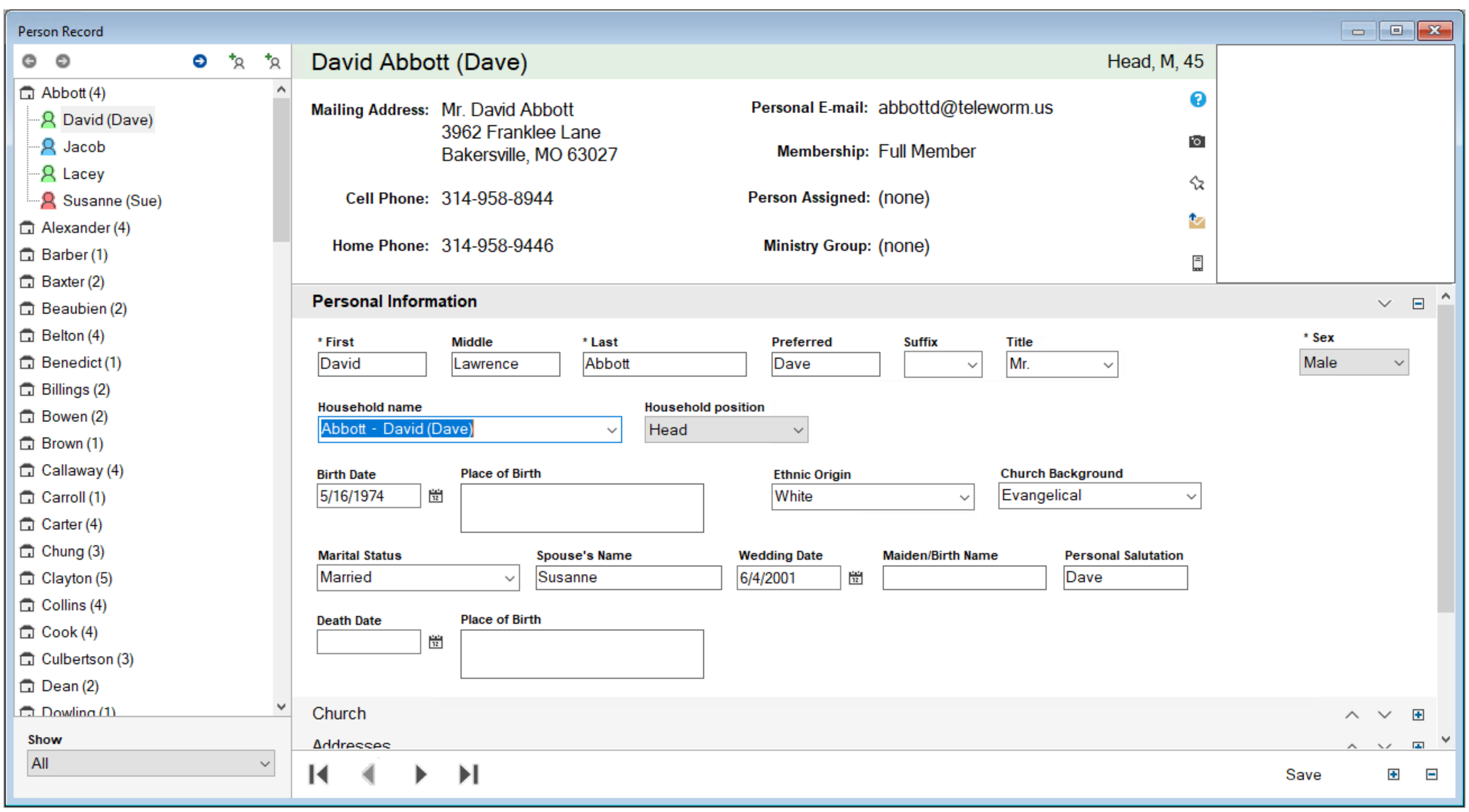
The Membership Module is based around two different types of records: Households and People. It is important to understand the differences between them and how they relate to each other.

» A Household record represents the family's physical location and contains information that pertains to the entire family or group. This would include information such as the family's address, the primary family phone number, or a household email address that all family members use.

» A Person record represents the actual person (as opposed to a building) and contains information that is pertinent to that particular person as an individual. This includes, but is not limited to, information such as the person's baptism and confirmation dates, if they are a member, their cell or work phone numbers, and if they are married.

Note: If you select an item in a drop list using Enter key or the mouse, the focus will automatically jump to the next data entry field on the screen, saving you a keystroke/click.

1. The Household record keeps all the family members grouped together for tracking and reporting purposes. For this reason, a Household record must be created prior to the Person records being created.



Household Tree

The Household Tree view is available when looking at any household or individual record. The household tree view shows you each household in your database, and how many people are in that household, and if you click on the household, the people who are in that household.

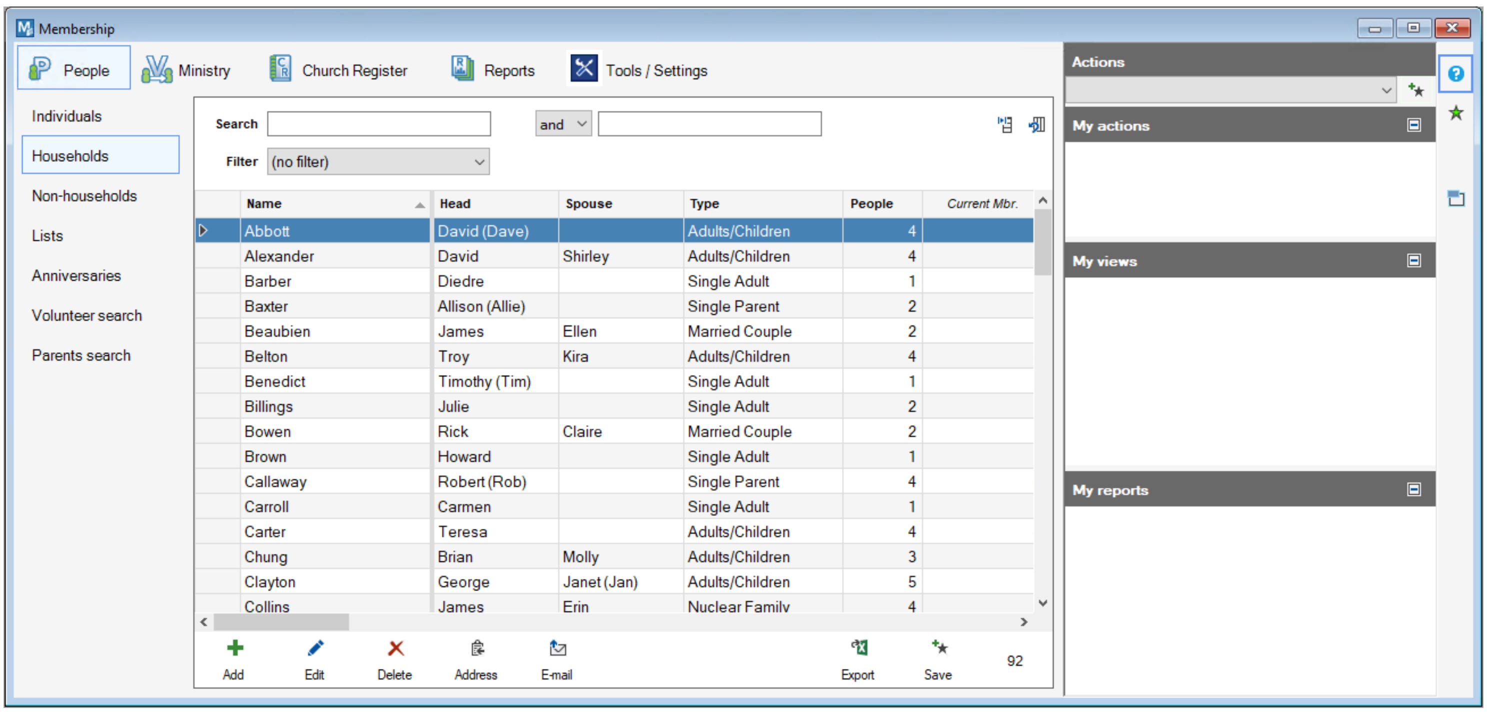
1. To access the Household Tree view, open any household or person record. One the far left side of the window that appears is the Household Tree.
2. Click on the household you want more information on. When you click on the household, each person who lives in that household's name will appear. If you would like to open their person record, click on their name.
3. You can click the Person with the arrow pointing right to open the "Move person to a different household" utility for the person you have selected.
4. If you click the person with the plus sign above their head icon at the top of the tree, it will take you to the add a person utility, with the currently selected household already selected
5. Clicking the house with the plus sign over it will open the add a household window.
6. At the bottom of the tree, the "Show" filter lets you select what group of households you want to see on the tree.

The Household Grid

The Household records in your database can be easily managed through the use of a grid. The grid that contains all Household records is called the Household Grid.

From here you can quickly view a household's Address, Home Phone Number, Email Address and other important information about the household. The household grid can be searched using the search bars using the standard search conventions.

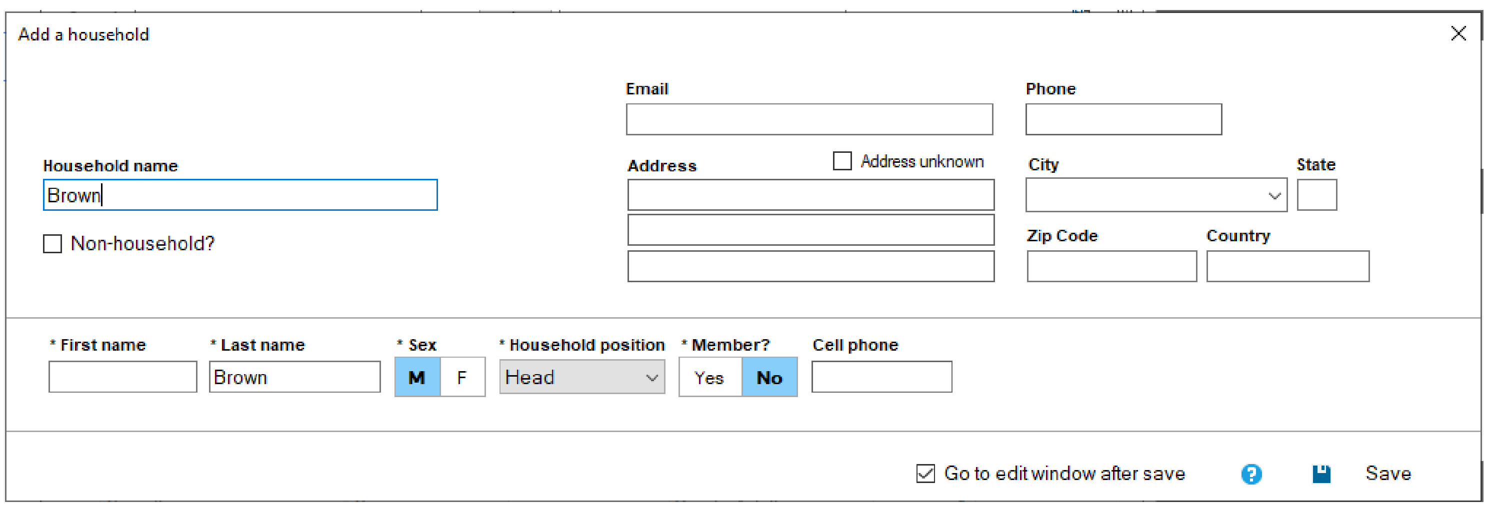
In addition to being able to add, edit and delete households, you can also copy the address of a household by clicking the "Address" button down at the bottom of the grid. You can also click the "Email" option to bring up the email window to send an email to the selected household.



Add Household

To add a Household in Shepherd's Staff, you need to press the Add button on the household grid. The window that appears next will include fields for all suggested information that should be entered for each household, however, the only field that is required is the Household name field. All other fields, while helpful to have, are not required by Shepherd's Staff. The more complete this data is, the more useful your database is, and so it is to your church's benefit to fill out as much data as possible on each household.

1. The first step is to fill in the Household Name field. Traditionally, the last name of the family or group would go into this field. If the household is for something like a business or another church, check the box for "Non-Household?" to indicate that this is not a family you're filling in data for.
2. Fill in as much additional information about the household as you can. If you're unsure of the address for the household, check the "Address unknown" box. This will gray out all relevant address fields.
3. If this is a household for a new family at your church, you can start filling out the members of the household. You will need to fill out the Name, Sex, Household Position and Member status. The Cell phone field is optional, and can be filled out for each person you add. Once you start adding information for one person, another box will appear if you need to add additional people
4. If you want to add more information to the household than what appears on this window, before saving the household, make sure the "Go to edit window after save box is checked". Click Save to save the household and the people you have added.

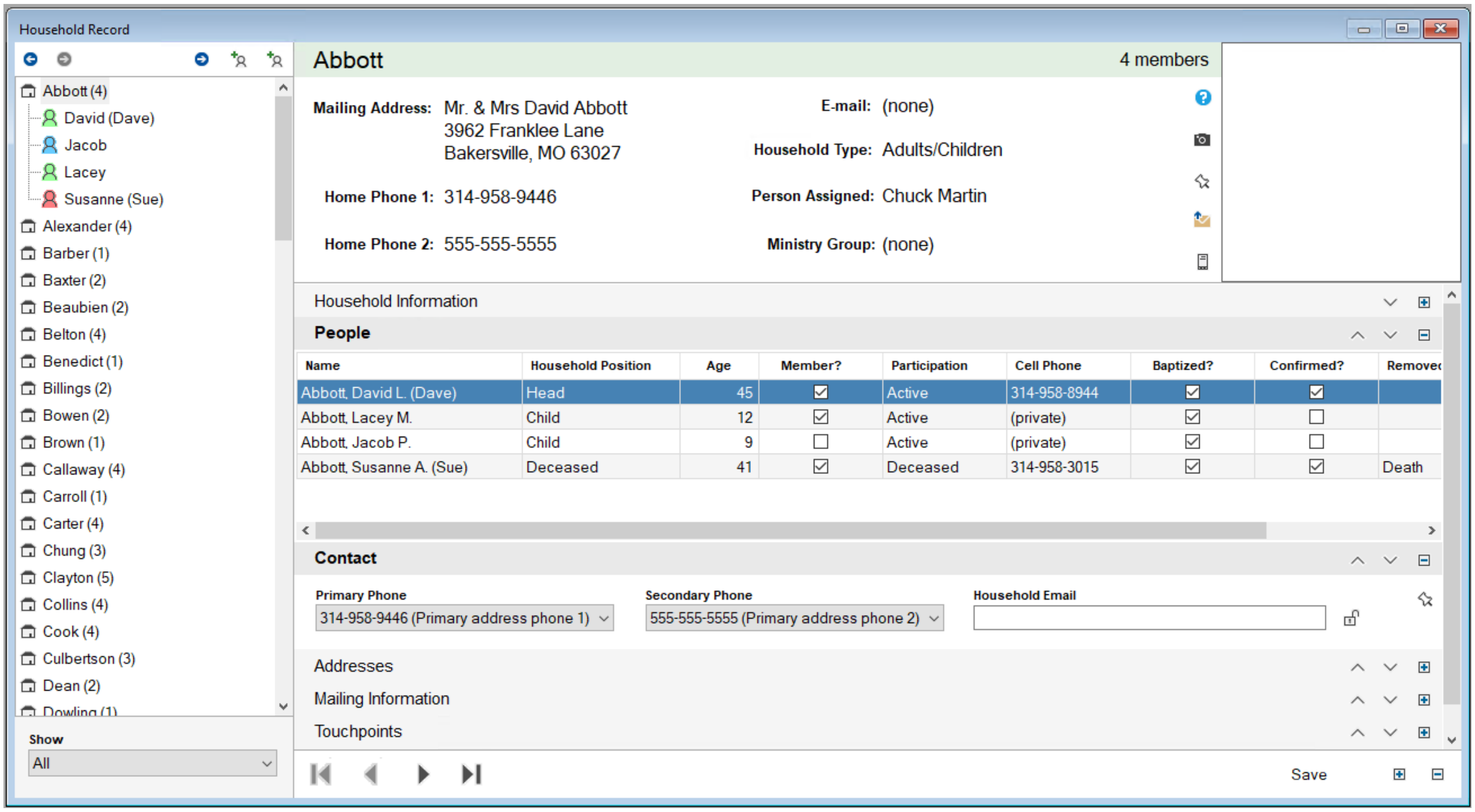


Household Records

The Household record contains several pieces of information about a family, and is a good reference to get an overview of a family. A Household Record contains several tabs, each referencing different aspects of a family. These tabs include:

- Household Information - Basic information about the family and how it relates to your church
- People - Shows the members of the household and a brief rundown of information about that person
- Contact - Shows ways of getting in touch with the family, including phone numbers and email addresses
- Address - This tab contains physical address information about the family, and has the ability to store two alternate addresses
- Mailing Information - This tab contains fields for how the family will appear in form letters and mailing labels, and if a family is a recipient of the Church Newsletter.
- Touchpoints - This tab shows each touchpoint a household has on their record, including touchpoints for individuals within a household
- Other - This tab contains custom fields where you can record information that Shepherd's Staff doesn't have fields for by default.

The Household Record also includes buttons at the very top for adding a Photo (Camera Icon), Notes (Thumbtack Icon), sending an Email (Envelope Icon) or sending a text message (Smartphone Icon). You can also re-arrange the order of the different tabs by clicking the box with an up arrow or box with a down arrow box near the top right of each tab to move them up or down in the order of tabs. You can also collapse or expand a tab by clicking the up arrow near the top right to collapse a tab, or the down arrow near the top right of the tab to expand it.

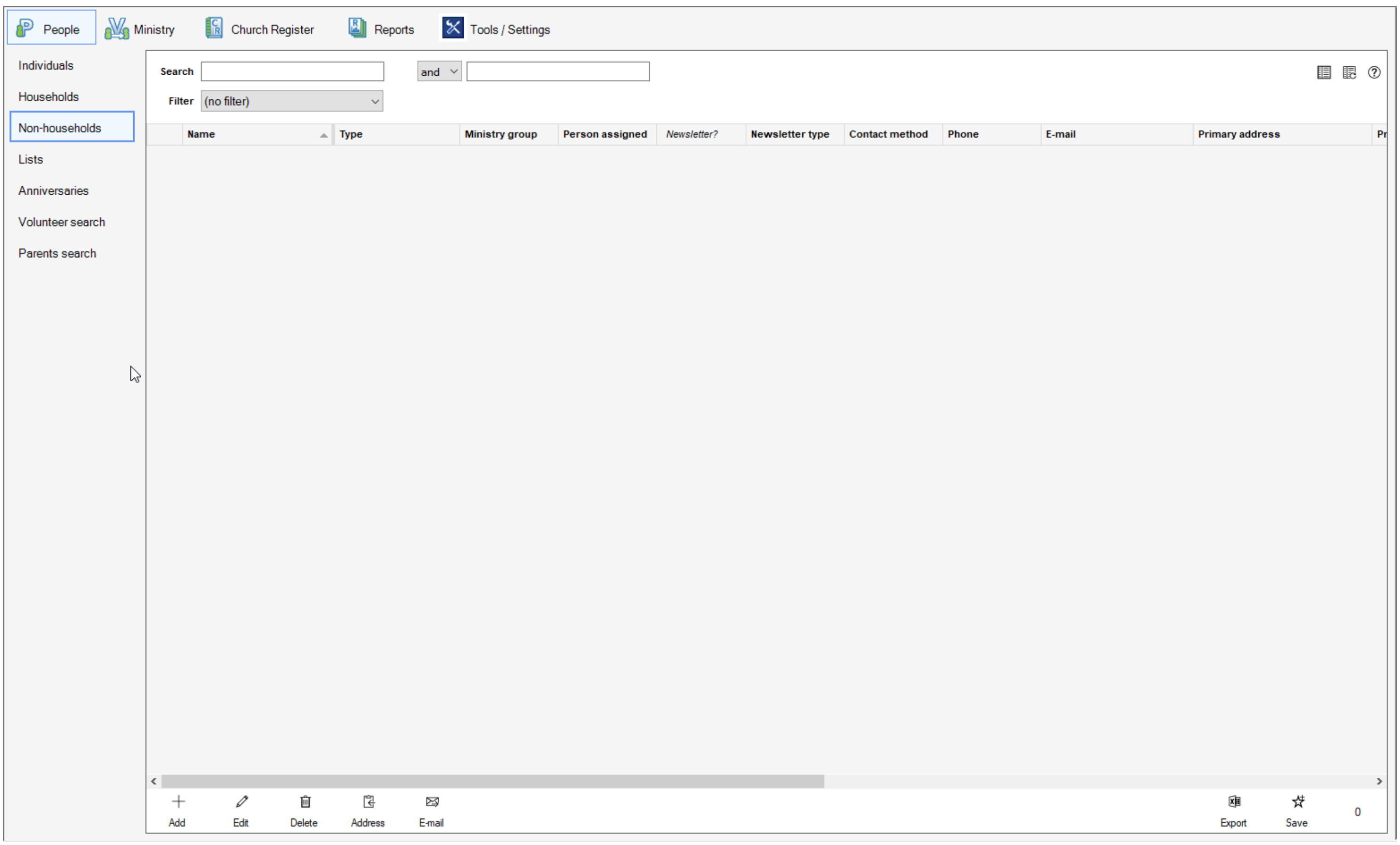

Household Record
Abbott (4)
David (Dave)
Jacob
Lacey
Susanne (Sue)
Alexander (4)
Barber (1)
Baxter (2)
Beaubien (2)
Belton (4)
Benedict (1)
Billings (2)
Bowen (2)
Brown (1)
Callaway (4)
Carroll (1)
Carter (4)
Chung (3)
Clayton (5)
Collins (4)
Cook (4)
Culbertson (3)
Dean (2)
Dowling (1)
Show
All
Abbott
4 members
Mailing Address: Mr. & Mrs David Abbott
3962 Franklee Lane
Bakersville, MO 63027
E-mail: (none)
Household Type: Adults/Children
Home Phone 1: 314-958-9446
Person Assigned: Chuck Martin
Home Phone 2: 555-555-5555
Ministry Group: (none)
Household Information
People
Name
Household Position
Age
Member?
Participation
Cell Phone
Baptized?
Confirmed?
Removed
Abbott, David L. (Dave)
Head
45
Active
314-958-8944
Abbott, Lacey M.
Child
12
Active
(private)
Abbott, Jacob P.
Child
9
Active
(private)
Abbott, Susanne A. (Sue)
Deceased
41
Deceased
314-958-3015
Death
Contact
Primary Phone
314-958-9446 (Primary address phone 1)
Secondary Phone
555-555-5555 (Primary address phone 2)
Household Email
Addresses
Mailing Information
Touchpoints
Save

Non-Households Grid

The Non-Households grid displays all households that have been added into your system that have been designated as non-households. A non-household is designated as a group, organization or another church that you want to keep track of in your Membership module of Shepherd's Staff. This is a special categorization that lets you track these entities in the non-household grid.

From this grid you can quickly view a non-household's Address, Home Phone Number, Email Address and other important information about the non-household. The household grid can be searched using the search bars using the standard search conventions.

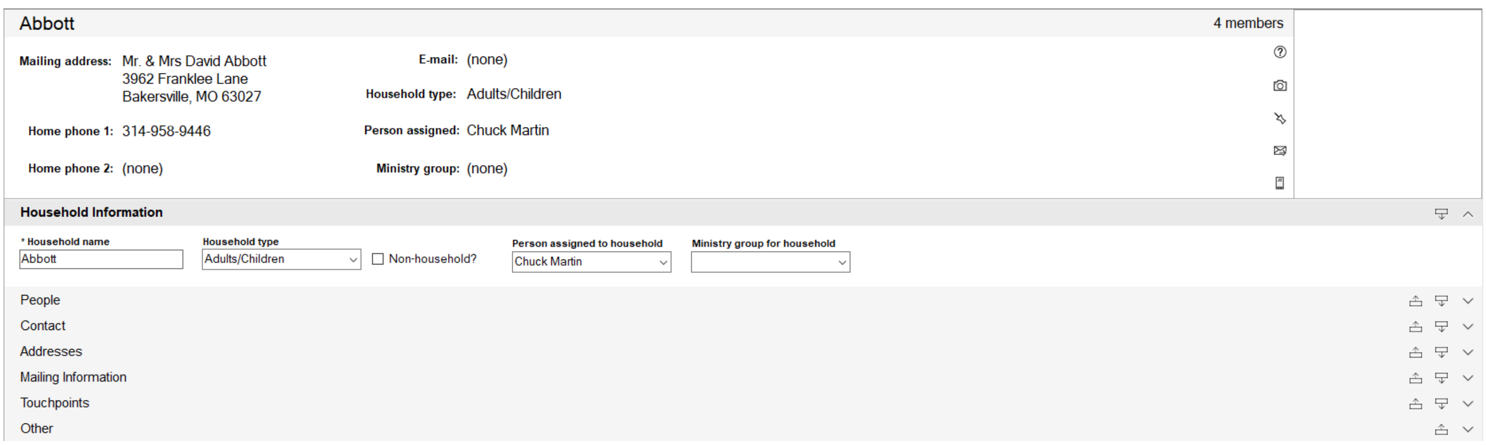
In addition to being able to add, edit and delete non-households, you can also copy the address of a non-household by clicking the "Address" button down at the bottom of the grid. You can also click the "Email" option to bring up the email window to send an email to the selected non-household.



Household Information Tab

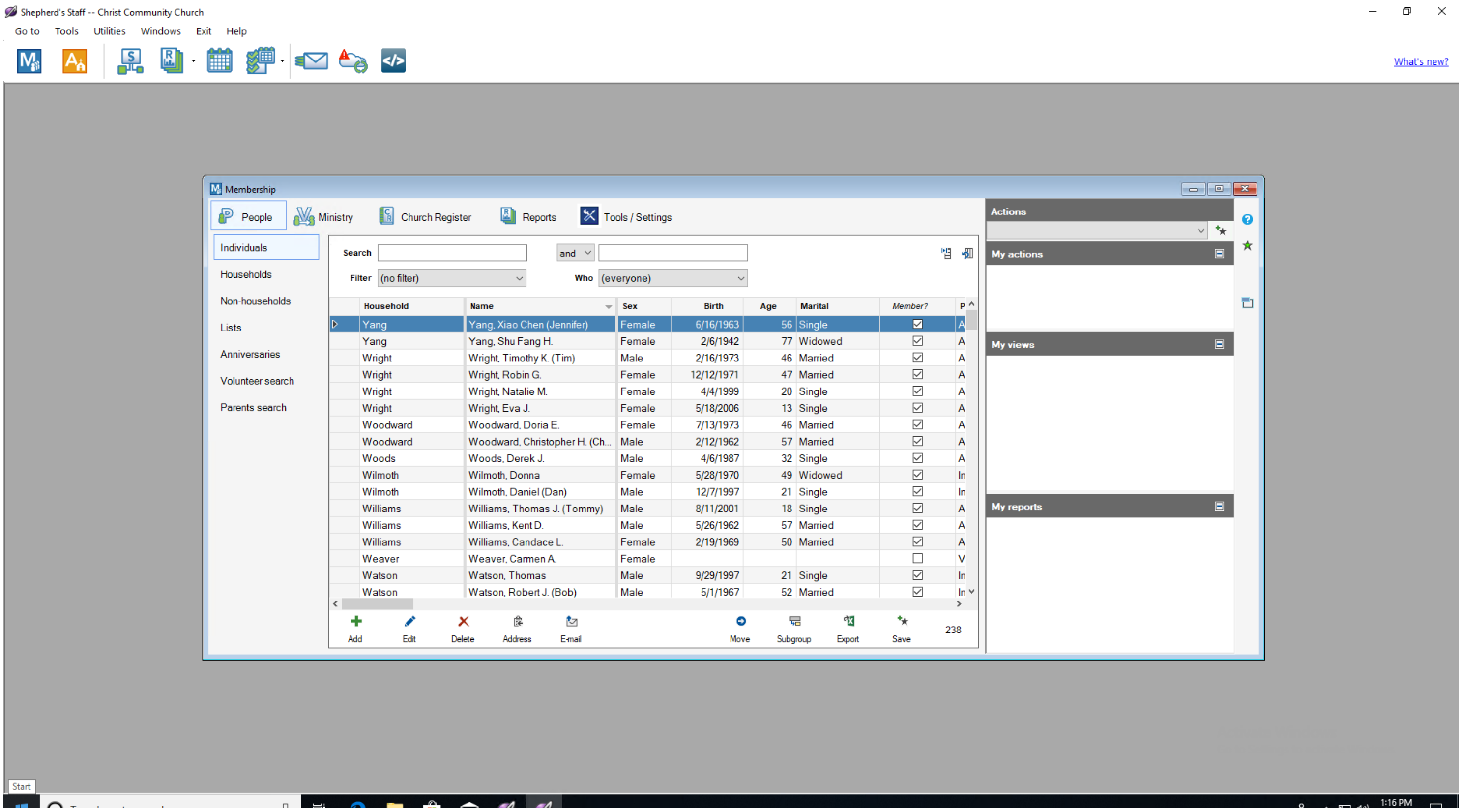
The Household Information Tab of a household record contains fields that Name and describe the household, as setting the Person Assigned and Ministry Group for that household. You can also designate a household as a "Non-Household" in this tab.

- Household Name - This field is the name of the family. Traditionally, this will be the last name of the family or group that this household is assigned to.
- Household Type - This field is an option field that describes what type of family the household is for. There are several different options available, and more can be added.
- "Non-household?"- This checkbox designates if a household is considered a "Non-household". A Non-household is a household that is for a business, church or other organization than a family.
- Person assigned to household -This is an option field where you can designate which person is assigned to this family. Typically churches use this field to designate an elder who is responsible for a family at the church
- Ministry group for household - This is an option field where you can designate which ministry group a family is a part of



People Tab

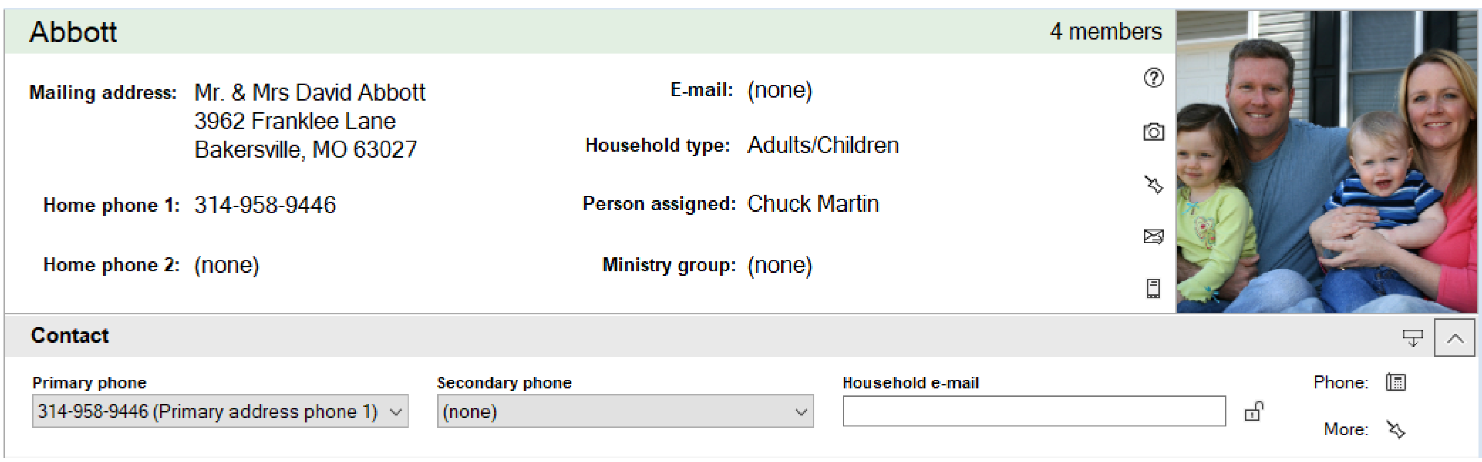
This tab in a household record lists the people who are members of the currently selected household. This tab contains information on each person's household position, as well as membership status and other information on a person's relationship with the church. You can double click on any person on this list to open that person's Person Record.



Contact Tab

This tab lists the primary ways to get in touch with a family in a household. There are fields that list both the primary and secondary phone numbers for the household, and and a household e-mail field.

- Primary phone - This is an option field where you can select the main phone number a household can be contacted at. Any phone number associated with a household, whether it be in the Addresses tab for the phone number for the household, or a phone number listed within a person record that resides at the household can be selected.
- Secondary phone - This is an option field where you can select the main phone number a household can be contacted at. Any phone number associated with a household, whether it be in the Addresses tab for the phone number for the household, or a phone number listed within a person record that resides at the household can be selected.
- Household email - This is the primary email address where the household can be reached with information. If this email should be made private for the purposes of a Church Directory, click the padlock icon next to the email address to make that email address private.
- Other Contact Information - Click on the Thumbtack icon to add additional contact information you may want for a household.



Household Addresses Tab

The Household Addresses Tab contains the address information fields, as well as phone numbers for each address a household may be associated with. You can designate the primary address, two alternate addresses and a mailing address in this tab.

- Address - There are three separate lines for an Address Line 1, 2 and 3. If you click the notes button (thumbtack) you can enter a description of the address as well. If this is not the mailing address for the household, uncheck the "Use as mailing address" checkbox, and a 4th option will appear below Household away 2, "Mailing", where you can enter a separate mailing address for the household.
- Begin use on/End use on (Only available for Household away 1 & 2): Gives a starting and ending date for when an alternate address will be active. If this is an alternate address that is used on an annual basis, check the Repeats Annually box. This will automatically update the starting and ending dates for the next year as soon as the time period is up.
- City: This is an option field. Cities you've entered for other households will be available here, or you can add a new option.
- State, Zip Code, Country, Carrier Route: Fill in the appropriate information for the address in each of these fields
- Country Code: This is an option field. County codes you've entered for other household will be available here, or you can add a new option.
- Address phone numbers: These are household phone numbers. You can add a note to any of the numbers by clicking the Note button (Thumbtack) next to each number. If a number shouldn't be listed on your church directory, make sure to click on the Private button (Lock) to designate that phone number as private.

To add notes about the address as a whole, click the notes button (thumbtack) on the far right side of the tab. To delete the address, click the trash can icon. If you want to copy all of the address to your clipboard in windows, click the clipboard icon. Finally, if you want to see the address on Google Maps, click the globe icon.

Mailing Information Tab

The Mailing Information Tab of a household record contains fields that designate how a household is addressed when it comes to form letters and mailing labels. You can also designate if a household would like to receive newsletters from the church.

- Salutation for form letters: This is how the household name will appear when you use Mail Merge to create a form letter. When you enter information in this field, try to use the same format for each household, so you have a consistent outcome for your form letters (For example, don't enter Dave and Sue for one family and then enter John and Sally Smith for another.)
- Label name styles 1 & 2: These fields control how a household will appear on mailing labels. We provide two fields so you can use two different conventions for a household (So, for example, you might use the format "Mr. & Mrs. David Abbott" for field 1, and in field 2, you would use "The Abbots". Be sure to use the same format for each household so your labels are consistent.)
- Receives newsletter: This checkbox indicates if this family would like to receive a newsletter from your church. If checked, when generating mailing labels, and you're selecting what group of people you would like to send to, your Newsletter group will consist of each household that has this option checked. After you check this box, you can indicate if the household would like to receive the newsletter in print, a digital copy (over email) or if they would like both a print and digital copy.

Touchpoints Tab

The Touchpoints tab shows all planned and completed touchpoints for the household, and each individual in the household, with some basic details including date, category, who made the touchpoint and what method it took. You also have the ability to add both planned and completed touchpoints for the households or individuals from this view as well.

Household Other Tab

The Household Other Tab is a place to put in information for custom fields. You can customize the names of these fields in "Customize field names section" of the Tools/Settings section of the Membership module.

- Option 1, 2 & 3: These fields are option fields, where you can add options to the droplists.
- Text 1, 2, & 3: These fields are text fields, where you can write in unique text for each household.
- Date 1, 2, & 3: These fields are date fields, where you can fill in a date.
- Checkbox 1, 2, & 3: These are checkboxes you can check off to indicate participation by a household in what you name the field.
- Map Block: This is for use with a paper map you might use at your church, where you indicate what page, row and column a household resides at on your map.

Lists

List Mass Updates

Often, you will need to make changes to lists, and usually, more than just one record needs to be changed at once. The List Mass Update utilities make this possible. From this menu, you can add multiple people to a list at the same time, manage lists where you might add and remove people at the same time, change the name of lists, or in the case of activities, move people from present involvement to experience.

To access the List Mass Updates Utilities, under people, click on the Lists tab, and then, click the "Tools" button. From here, there are three different utilities you can use to update your lists:

Add Names to a List

This utility will allow you to pick a list and add multiple people to it at once.

1. Select "add names to a list" in the Action section of the Mass Update Window.
2. Select which type of list you're working with in the "Which type of list?" section, and you can filter that type of list by only showing lists with people in them, lists that are empty, or both. Then, select the list you want to edit in the "Which list?" window and click Continue
3. In the next window, you will see two columns one for "People not on this list" and one for "Add these people to the list". You can filter the "People not on this list" field by using the "Filter the possible people" field below the list to filter the list by a particular group or subgroup
4. Click on each person that you would like to add to the list to highlight them. You can double click one of the selected people, or press the "Add button" to add them to the "Add these people to the list" section. You can also click the "Add All" button to add everyone who is in the "People not on this list" column to the "Add these people to the list" column
5. You can remove people from the "Add these people to the list" column in the same way you added them, except you would press the "Remove" button. You can also remove everyone from the list by clicking the "Remove all" button
6. In the options section, you can assign a Category, and in the case of an activity, a begin and end date.
7. Once you have made your selections, click "Save" to add the selected people to the list.

Erase and Replace a List

This utility will allow you to remove multiple people from a list and add new people to it at the same time.

1. Select "erase and replace a list" in the Action section of the Mass Update Window.
2. Select which type of list you're working with in the "Which type of list?" section, and you can filter that type of list by only showing lists with people in them, lists that are empty, or both. Then, select the list you want to edit in the "Which list?" window and click Continue
3. In the next window, you will see two columns one for "People not on this list" and one for "People on the list". You can filter the "People not on this list" field by using the "Filter the possible people" field below the list to filter the list by a particular group or subgroup

4. Click on each person that you would like to add to the list to highlight them. You can double click one of the selected people, or press the "Add button" to add them to the "People on the list" section. You can also click the "Add All" button to add everyone who is in the "People not on this list" column to the "People on the list" column
5. You can remove people from the "People on the list" column in the same way you added them, except you would press the "Remove" button. You can also remove everyone from the list by clicking the "Remove all" button
6. Once you have made your selections, click "Save" to add the selected people to the list.

Manage Lists

The Manage Lists utility will allow you to rename a list, or in the case of activities, change everyone who has present participation to experience for the selected activity, or all activities.

1. Select "manage lists" in the Action section of the Mass Update Window.
2. To add a brand new List, press the "Add" button, type in the name of the new list and press the save icon.
3. If you want to rename, or change the participation on a list, select which type of list you're working with in the "Which type of list?" section, and you can filter that type of list by only showing lists with people in them, lists that are empty, both, or missing from the dropdown choices. Then, select the list you want to edit in the "Which list?" window.
4. Click the "Rename" option, and you can then type in the new name for the selected list. Click the save icon when finished.
5. If you want to change everyone in a selected activity who has present participation to experience, select "Present to Experience for the selected activity" in the Change box. If you want to do this for all activities, select "Present to Experience for ALL activities". When you've made your choice, click the "Go" Button to make this change.

Add Person Assigned

Your church may have specific people who oversee particular households or individuals. Typically, these people are elders or other leadership figures in your church. Shepherd's Staff tracks these relationships through the Person Assigned field, which can be managed and added to in the Lists view.

Adding One Person Assigned Record to One Household or Individual

1. In the People Tab, click on Lists
2. Click the Add button at the bottom of the grid and select "Person Assigned" in the window that appears.
3. In the next window, choose if you're adding the Person Assigned to an Individual or a Household
4. In the Household or Person field, select the Household or Person you're adding a Person Assigned to.
5. In the Person Assigned field, select the Person Assigned you're adding to a person. You can add a new option by clicking in the activity box and clicking the "Add/Remove Item from the list" button
6. Click Save to save the Person Assigned record.

Add Ministry Group

Your church may have different groups that households or individuals are assigned to that meet outside of the normal Sunday services. Shepherd's Staff defines these groups as Ministry Groups, and in the Lists section, you can see who is assigned to a Ministry Group.

Adding One Ministry Group Record to One Household or Individual

1. In the People Tab, click on Lists
2. Click the Add button at the bottom of the grid and select "Ministry Group" in the window that appears.
3. In the next window, choose if you're adding the group to an Individual or a Household
4. In the Household or Person field, select the Household or Person you're adding a Ministry Group to.
5. In the Ministry Group field, select the Ministry Group you're adding to a person. You can add a new option by clicking in the activity box and clicking the "Add/Remove Item from the list" button
6. Click Save to save the Ministry Group record.

Add Training

Your church may offer classes or courses in different topics that your congregation might take part in. For example, your church may offer a confirmation class, a program to help educate foster parents, or even CPR certification courses. In order to keep track of all these educational events, and the people who take part in them, Shepherd's Staff allows you to keep lists of trainings that people have gone through.

Adding One Training Record to One Individual Person

1. In the People Tab, click on Lists
2. Click the Add button at the bottom of the grid and select "Training" in the window that appears
3. In the person field, select the person you're adding the Training to
4. In the Training field, select the Training you're adding to a person. You can add a new option by clicking in the activity box and clicking the "Add/Remove Item from the list" button
5. In the Category field, you can categorize what type of Training you're adding to a person.
6. The Date Completed Field indicates when a person completed their training.
7. Click the Note button to add any Notes for this Training.
8. Check the "Add Multiple" box if you want to add another activity. Click Save to save the Training record.

Add Skill/Spiritual Gift

Your church has people with many different talents and skills that they have developed through the years that make them equipped to better serve. Shepherd's Staff offers a way to record these skills or spiritual gifts so you have a quick reference on who in your congregation may be best suited to serve in a particular capacity.

Adding One Skill/Spiritual Gift Record to One Individual Person

1. In the People Tab, click on Lists
2. Click the Add button at the bottom of the grid and select "Skill/Spiritual Gift" in the window that appears
3. In the person field, select the person you're adding the skill or spiritual gift to
4. In the Skill/Spiritual Gift field, select the Skill/Spiritual Gift you're adding to a person. You can add a new option by clicking in the activity box and clicking the "Add/Remove Item from the list" button
5. In the Category field, you can categorize what type of Skill/Spiritual Gift you're adding to a person.
6. Click the Note button to add any Notes for this Skill/Spiritual Gift.
7. Check the "Add Multiple" box if you want to add another Skill/Spiritual Gift. Click Save to save the Skill/Spiritual Gift record.

Add Activity

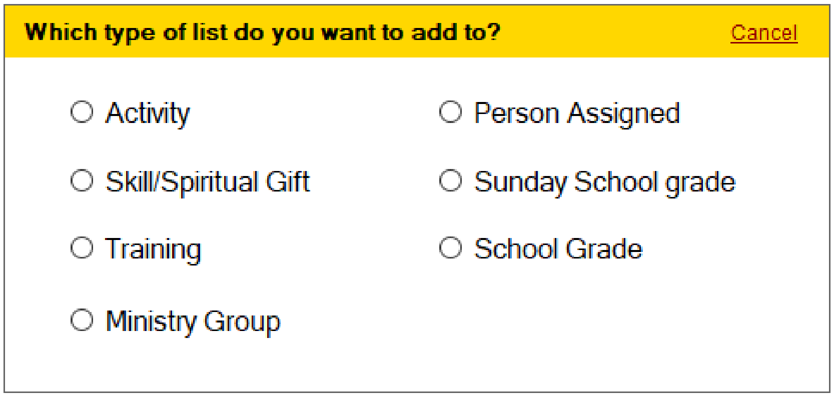
Your church has many different groups that serve your church or your congregation in many different ways. Activities are a type of list that can track who are in these groups, and in what capacity they are involved in these groups. Some examples of activities people might be involved in are Bible Study Groups, Ushers, Greeters, or Finance Committee. Adding Activities to people in your church within Shepherd's Staff provides you a way to keep track of people's involvement in these groups.

Adding One Activity Record to One Individual Person

1. In the People Tab, click on Lists
2. Click the Add button at the bottom of the grid and select "Activity" in the window that appears
3. In the person field, select the person you're adding the activity to
4. In the Activity field, select the Activity you're adding to a person. You can add a new option by clicking in the activity box and clicking the "Add/Remove Item from the list" button
5. Select the person's Participation in the Activity, either Present, Experience or Interest. Present means that the person is presently involved with the Activity, Experience means that a person was a part of this Activity in the past, and interest means the person isn't a part of the Activity right now, but has expressed interest in being a part of this Activity
6. If a person is an officer in this Activity, such as a president or treasurer of a group, then enter that information in the "Office" field
7. The Begin and End dates can be filled in if the Activity has a specific time period that it will be active through.
8. Click the Note button to add any Notes for this Activity.
9. Check the "Add Multiple" box if you want to add another Activity. Click Save to save the Activity record.

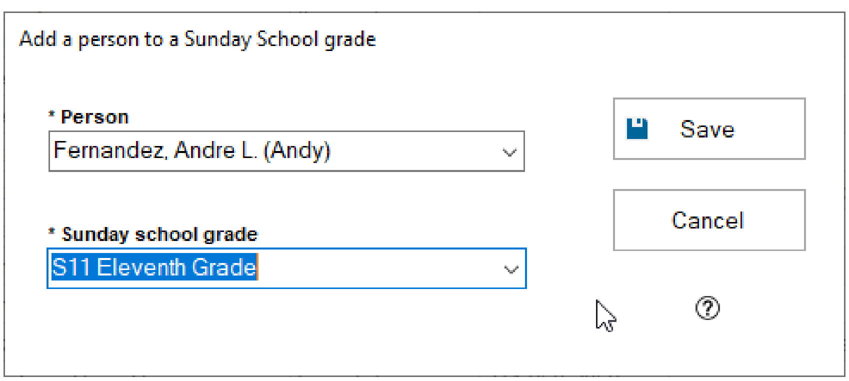
Add Sunday School/School Grade

Sunday School and School Grades are similar concepts in Shepherd's Staff. A person's Sunday School grade refers to the Sunday School class a person is in at your church. A school grade refers to grade level a person is in at their school. Often, these concept will line up where a person's Sunday School Grade will match their School Grade, but Shepherd's Staff separates these concepts to allow for flexibility.



» Add a Sunday School grade to a person:

1. In the Lists Grid, click the "Add" button and choose "Sunday School grade"
2. In the "Person" field, choose the person you will be assigning a Sunday School grade to. The Person field contains all person records in Shepherd's Staff.
3. In the "Sunday school grade" field, choose the Sunday School grade you want to assign to the selected person. If you need to add a new Sunday School grade, you can do so by clicking inside the drop down box, and then clicking the "Add/Remove an item from the list" button to the left of the field to add a new option.
4. When finished, click Save to add the Sunday School grade to the selected person

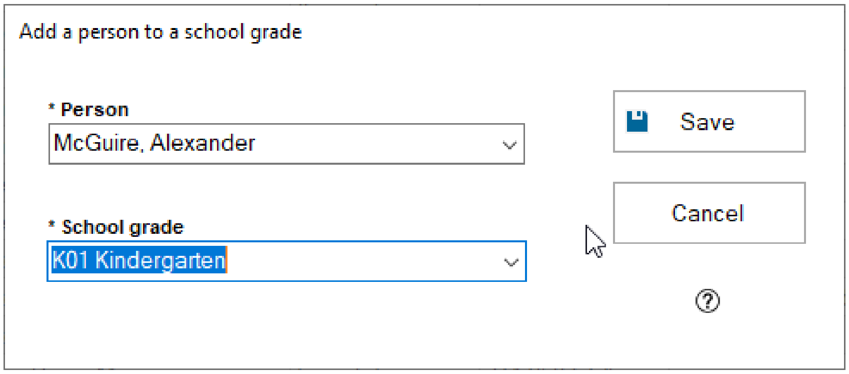


» Add a School grade to a person:

1. In the Lists Grid, click the "Add" button and choose "School Grade"
2. In the "Person" field, choose the person you will be assigning a School grade to. The Person field contains all person records in Shepherd's Staff.

3. In the "School grade" field, choose the School grade you want to assign to the selected person. If you need to add a new School grade, you can do so by clicking inside the drop down box, and then clicking the "Add/Remove an item from the list" button to the left of the field to add a new option.

4. When finished, click Save to add the School grade to the selected person.

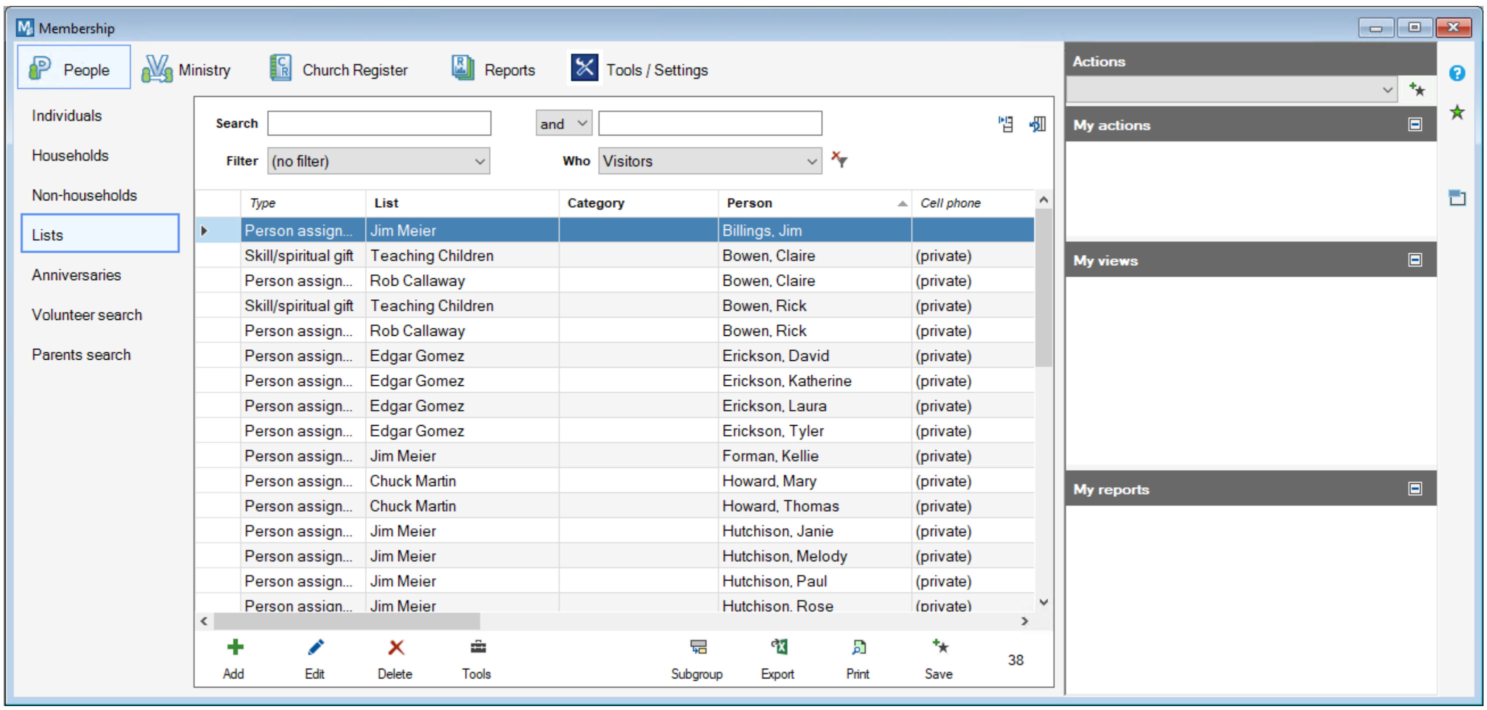


The Lists Grid

Lists inside of Shepherd's Staff represent many different ideas, from the activities in the church one is a associated with to the Sunday School Grade one is a part of. The Lists grid organizes all these different lists into one location and shows a unique record for each list a person appears on.

From this grid, you can quickly view the name of each list, who is on that list, and the relevant contact information for that person. This lists grid can be searched using the search bars using the standard search conventions.

In addition to being able to add, edit and delete individual entries to a list, you can also access tools for updating lists in mass from the "Tools" button.



Add/Edit Records

Combine Duplicate Person Information

The Combine Person utility takes the records of two people and combines them. This utility combines attendance for the two people but does not combine their contribution information.

» Note: If the either person being merged has contribution data, the utility will not run.

» Important: These changes are permanent and cannot be reversed. It is important to make a backup before using this utility. For information on making a backup, see the "Backing up Your Database" article.

The person you select in the field under "Select a person to combine" is the person whose record will be deleted. All people will automatically appear in the field under "Select a person to keep". If you select someone with contribution records, after you click "OK" a notice will appear stating that the merge cannot be continued until you run "Combine Contributions for 2 Envelopes" in the Contributions module.

The next window will list any details that are different between the two records you are combining. Use the check boxes to select the information you want to keep. All activities, skills, training, attendance, AR accounts, vendor information, and visits are merged. This may cause some conflicting information, so the combined record should be reviewed after the merge to confirm all details.

Here is how to combine two people:

1. Make a backup of your database.
2. In the Membership Module, click on Tools/Settings
3. In the Tools section, select "Combine duplicate person information" and click start
4. Click "Yes" to confirm that your database has been backed up.
5. In the left column, select the person you want to combine. This person's record will be deleted at the end of the process.
6. In the right column, select the person you want to merge the record with.
7. Click "OK".
8. If there is conflicting information, a notice will appear. Use the check boxes to select the information to keep, then click "Apply". (If all information is the same, this step is skipped.)
9. Click "Yes" to confirm that you want to merge the two accounts.
10. Click "OK" to close the window.

Deleting a person

The deletion process is very simple if a person has no Attendance or Offering records. However, if a person does have at least one Attendance or Offering record that person cannot be deleted. If a person has records and a delete is attempted, Shepherd’s Staff will display a message telling you how many Attendance or Offerings records they have.

In this case you can either choose to delete those records manually in each module or you can use the Membership Clean Up utility. It’s recommended that, if necessary, this utility be used at the end of the year.

Note: By deleting Attendance or Offering records, your historical reports will no longer be accurate, since the program uses those records to create the reports.

1. Open the Individuals Grid and highlight the Person record you wish to Delete.
2. Click the Delete button on the bottom of the grid.
3. Click “Yes” to confirm the deletion.

Remove a person from a family

Whenever a person moves or passes away, we want to make sure their record is handled properly, so that their data and your reporting stay accurate.

In order to properly update a removed person’s record we need to set the “Removed By” status on their Person record. This will keep their record in the database while allowing you to filter them out of reports and certain windows. Using this method your end-of-year reporting stays accurate as the program will still find the Person’s record and know they were removed in the ascribed year.

After the reports have been printed at the end of the year, you have two options for how to proceed with removed people. You can choose to keep them in the database knowing that you can filter them out (this is recommended) or you can choose to delete them.

Note: If you are removing this person by death, you will receive a reminder window showing you some things you can check to make sure the database is up to date.

1. Go to the Individuals Grid and highlight the person you need to remove
2. Click the Edit button.
3. Go to the Church tab.
4. Change the Removed By field to the appropriate status.
5. Set the Date Removed field to the actual date this person was removed.
6. Change the Participation to the relevant status for the type of Removed By chosen. (Records Removed by Death will automatically have Participation filled with Deceased when you click Save)
7. No other fields have to be changed on the Person record (if someone was/is a Member, keep him or her listed as a Member. It helps to remember that this person is now a Removed Member, not a Removed Non-Member).
8. Once you are done, click OK.

Adding to a Family

When a new person joins a family through an event like birth or adoption, there are a few different spots in Shepherd's Staff that need to be addressed.

1. Add the person (Refer to the "Add a Person" page for more info).
2. Check the Household Type field on the Household record as that may need to be changed.
3. Edit the Father's and Mother's Person records and update the number of children they have on the Family tab of their person records.

Managing a Divorce

In order to manage a divorce in your database, you will need to know the answers to the following questions:

» Is one of the parties staying at their current residence?

If so, then that party's Person record can stay within the household while the other person is moved out of the house. You will need to create a new Household record for the party moving to a new residence.

» Are there kids involved and where will the kids live?

The person who is moving out, and any children that might be moving with them will need to moved to the new household using the move a person to a different household utility.

» Will any names be changing in the process?

Changes will need to be made in fields that are in both the household and person records for both parties involved in the divorce. Below is a listing of all the fields that you should check in both person records, and both household records to make sure they accurately reflect both parties new information:

- Person Information
  - Last Name
  - Marital Status
  - Divorced Date
  - Spouse Name
  - Prior Surname (if reverting back to their last name before marriage)
- Household Information
  - Household Name
  - Household Type
  - Salutation for Form Letters
  - Label Name Styles 1 & 2

Note: If one or both of these people have contributions in the database, then you will need to make the necessary changes in the Contributions module. The steps involved will be covered in the Contributions Manual.

Handling Marriages

Whenever a couple gets married, there are a few housekeeping items that need to take place. Namely, moving them into the same household and updating any names or other data that need to be changed. You can start by answering the following two questions:

» Do the people getting married already have a Person records in your database?

If the Person records already exist, do not create new ones. This will only duplicate the records and add confusion to the process. Instead, move them into a Household record together.

» Does either party already have a Household by themselves?

If they do, you will need to decide which household record to keep. If they are moving into one of their houses, you will want to keep the Household record that already contains the address information. If they are both moving out and into a new house, you can use the move person to a new household utility. This utility will let you move one member of the couple, and create a new household at the same time.

Note: If one or both of these people have contributions in the database then you will need to make the necessary changes in the Contributions module. The steps involved will be covered in the Contributions Manual.

After both members of the couple have been moved into the same household, there are a few things you will want to look over in their person records. In the personal information tab for both people, make sure you have changed their Marital status field to Married, enter their wedding date in the Wedding Date field, fill in their spouse's first name in the Spouse's name field, and if a member of the couple changed their last name, make sure to update their last name to their new last name, and enter their previous last name in the "Prior surname" field.

Move a Person to a Different Household Utility

Often, you will need to move people from one household to another, or from one household into their own household. This can happen for a variety of reasons, but in each situation, a person will need to be moved from their current household and into a new one. Shepherd's Staff offers a utility for just this situation called "Move a Person to a Different Household". This utility can be found in the Individuals Grid.

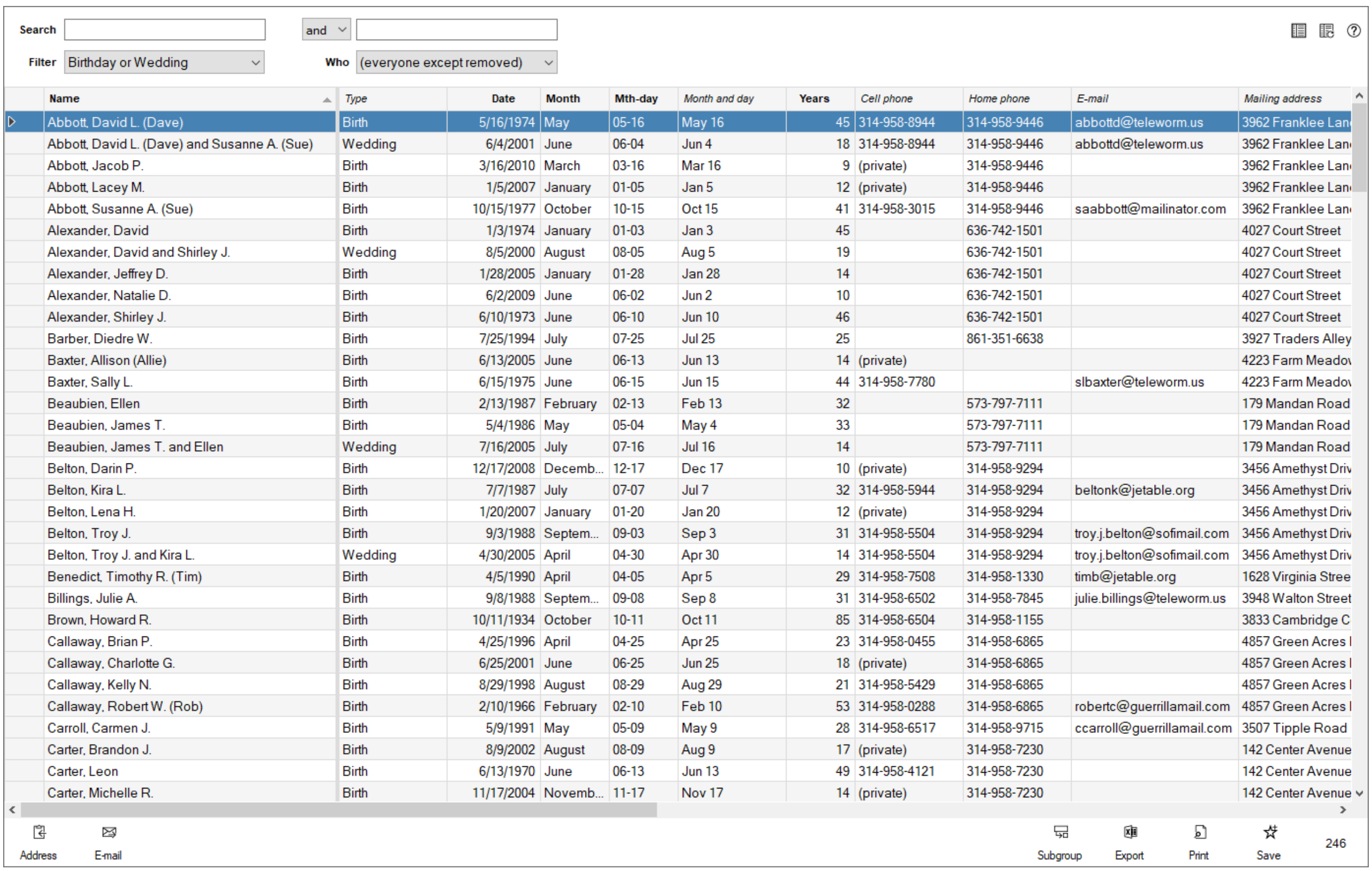
1. Click on the person you want to move to a different household, and then click "Move" at the bottom of the grid.
2. In the window that appears next, the person you selected in the previous step should already be selected in "Person to move", but if you want to change who you're moving, select the person you want to move in this field.
3. If you want to move a person to an existing household, select the household you would like to move them to in the "Intended household" field, and set the household position they will hold, and then click save.
4. If you want to move a person to a brand new household, click the + next to "Intended Household" and add in the information for that household. When finished, click Save. Then, in the "Intended Household box", select the household you just added, and set the household position you'd like the person you're moving to hold.
5. Click save to finish moving the person to their new household.

Anniversaries Grid

The Anniversaries grid gives you an overview of all the different types of anniversaries in your database, from Birthdays and Wedding Anniversaries to Baptism and Confirmation Anniversaries. All of this information is generated from the Person records in your database.

From the Anniversaries grid you can quickly view who and what an anniversary is for, as well as the relevant contact information for that person (people, in the case of wedding anniversaries). The Anniversary grid can be searched using the search bars using the standard search conventions. The Anniversary grid also includes filters for specific types of anniversaries

In addition to being able to view your anniversaries, you can also copy the address of a person by clicking the "Address" button down at the bottom of the grid. You can also click the "Email" option to bring up the email window to send an email to the selected person.



Name	Type	Date	Month	Mth-day	Month and day	Years	Cell phone	Home phone	E-mail	Mailing address
Abbott, David L. (Dave)	Birth	5/16/1974	May	05-16	May 16	45	314-958-8944	314-958-9446	abbottd@teleworm.us	3962 Franklee Lan
Abbott, David L. (Dave) and Susanne A. (Sue)	Wedding	6/4/2001	June	06-04	Jun 4	18	314-958-8944	314-958-9446	abbottd@teleworm.us	3962 Franklee Lan
Abbott, Jacob P.	Birth	3/16/2010	March	03-16	Mar 16	9	(private)	314-958-9446		3962 Franklee Lan
Abbott, Lacey M.	Birth	1/5/2007	January	01-05	Jan 5	12	(private)	314-958-9446		3962 Franklee Lan
Abbott, Susanne A. (Sue)	Birth	10/15/1977	October	10-15	Oct 15	41	314-958-3015	314-958-9446	saabbott@mailinator.com	3962 Franklee Lan
Alexander, David	Birth	1/3/1974	January	01-03	Jan 3	45		636-742-1501		4027 Court Street
Alexander, David and Shirley J.	Wedding	8/5/2000	August	08-05	Aug 5	19		636-742-1501		4027 Court Street
Alexander, Jeffrey D.	Birth	1/28/2005	January	01-28	Jan 28	14		636-742-1501		4027 Court Street
Alexander, Natalie D.	Birth	6/2/2009	June	06-02	Jun 2	10		636-742-1501		4027 Court Street
Alexander, Shirley J.	Birth	6/10/1973	June	06-10	Jun 10	46		636-742-1501		4027 Court Street
Barber, Diedre W.	Birth	7/25/1994	July	07-25	Jul 25	25		861-351-6638		3927 Traders Alley
Baxter, Allison (Allie)	Birth	6/13/2005	June	06-13	Jun 13	14	(private)			4223 Farm Meado
Baxter, Sally L.	Birth	6/15/1975	June	06-15	Jun 15	44	314-958-7780		slbaxter@teleworm.us	4223 Farm Meado
Beaubien, Ellen	Birth	2/13/1987	February	02-13	Feb 13	32		573-797-7111		179 Mandan Road
Beaubien, James T.	Birth	5/4/1986	May	05-04	May 4	33		573-797-7111		179 Mandan Road
Beaubien, James T. and Ellen	Wedding	7/16/2005	July	07-16	Jul 16	14		573-797-7111		179 Mandan Road
Belton, Darin P.	Birth	12/17/2008	Decemb...	12-17	Dec 17	10	(private)	314-958-9294		3456 Amethyst Driv
Belton, Kira L.	Birth	7/7/1987	July	07-07	Jul 7	32	314-958-5944	314-958-9294	beltonk@jetable.org	3456 Amethyst Driv
Belton, Lena H.	Birth	1/20/2007	January	01-20	Jan 20	12	(private)	314-958-9294		3456 Amethyst Driv
Belton, Troy J.	Birth	9/3/1988	Septem...	09-03	Sep 3	31	314-958-5504	314-958-9294	troy.j.belton@sofimail.com	3456 Amethyst Driv
Belton, Troy J. and Kira L.	Wedding	4/30/2005	April	04-30	Apr 30	14	314-958-5504	314-958-9294	troy.j.belton@sofimail.com	3456 Amethyst Driv
Benedict, Timothy R. (Tim)	Birth	4/5/1990	April	04-05	Apr 5	29	314-958-7508	314-958-1330	timb@jetable.org	1628 Virginia Stree
Billings, Julie A.	Birth	9/8/1988	Septem...	09-08	Sep 8	31	314-958-6502	314-958-7845	julie.billings@teleworm.us	3948 Walton Street
Brown, Howard R.	Birth	10/11/1934	October	10-11	Oct 11	85	314-958-6504	314-958-1155		3833 Cambridge C
Callaway, Brian P.	Birth	4/25/1996	April	04-25	Apr 25	23	314-958-0455	314-958-6865		4857 Green Acres I
Callaway, Charlotte G.	Birth	6/25/2001	June	06-25	Jun 25	18	(private)	314-958-6865		4857 Green Acres I
Callaway, Kelly N.	Birth	8/29/1998	August	08-29	Aug 29	21	314-958-5429	314-958-6865		4857 Green Acres I
Callaway, Robert W. (Rob)	Birth	2/10/1966	February	02-10	Feb 10	53	314-958-0288	314-958-6865	robertc@guerrillamail.com	4857 Green Acres I
Carroll, Carmen J.	Birth	5/9/1991	May	05-09	May 9	28	314-958-6517	314-958-9715	ccarroll@guerrillamail.com	3507 Tipple Road
Carter, Brandon J.	Birth	8/9/2002	August	08-09	Aug 9	17	(private)	314-958-7230		142 Center Avenue
Carter, Leon	Birth	6/13/1970	June	06-13	Jun 13	49	314-958-4121	314-958-7230		142 Center Avenue
Carter, Michelle R.	Birth	11/17/2004	Novemb...	11-17	Nov 17	14	(private)	314-958-7230		142 Center Avenue

Parents Search

The Parents Search tool allows you to search for children, based on specific criteria, and find out who their parents are and then provides you with ways to contact those children's parents and reporting options for these children and their parents. The filtering tools in this search allow you search for children, and who their parents are based on different options such as Sunday School Grade, Member status of their parents, and age range, as well as other filter options.

1. Access the Parents Search from the Individuals Tab by clicking Parents Search.
2. In this window, select what filters you want to use to produce your list of children. These options include:

Children - This field allows you to select a particular group of children by choosing a subgroup, Sunday School Grade, or another List.

Parents - This field checks the Member status of the child's parents at your church. You can filter based on if Either parent is a member, One parent is a member, both parents are members, or neither parents are members.

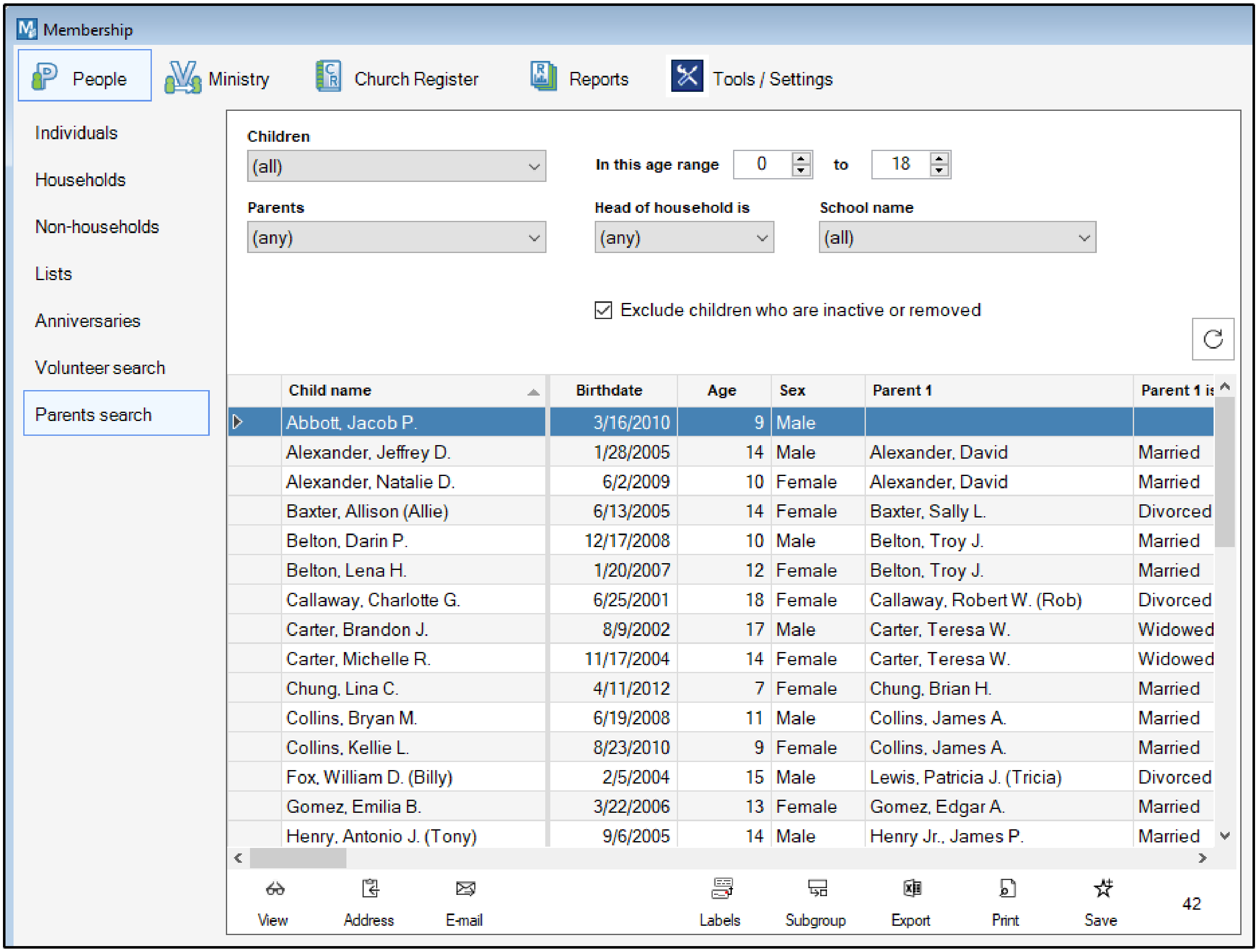
In this age range - This field allows you to select the lowest and highest age of child you want to search for. If a child does not have a birth date filled in on their person record, they will not appear on your search

Head of household is - This checks the marital status of the head of household that the child is in. You can search by any status, Married, Separated, Divorced or Single.

School name - This filter checks which School a child is enrolled in, based on what is filled out in the Work/School tab of their person record.

Exclude children who are inactive or removed - If this box is checked, no children who have the participation of inactive, or have a removed by reason listed in their person record will be included in the search

1. After selecting each filter you would like to use, Shepherd's Staff will automatically use this criteria to display the children who meet the criteria of the filters you selected.
2. Clicking the print button will allow you to print a report that shows the Child's name along with Membership, Contact and information on their Parents. You can group this report in different ways, such as by Ministry Group or Sunday School Grade
3. Clicking the "Labels" button will take you to the mailing labels screen where you can print out mailing labels for just the people who are showing in your filters.



Child name	Birthdate	Age	Sex	Parent 1	Parent 1 is
Abbott, Jacob P.	3/16/2010	9	Male		
Alexander, Jeffrey D.	1/28/2005	14	Male	Alexander, David	Married
Alexander, Natalie D.	6/2/2009	10	Female	Alexander, David	Married
Baxter, Allison (Allie)	6/13/2005	14	Female	Baxter, Sally L.	Divorced
Belton, Darin P.	12/17/2008	10	Male	Belton, Troy J.	Married
Belton, Lena H.	1/20/2007	12	Female	Belton, Troy J.	Married
Callaway, Charlotte G.	6/25/2001	18	Female	Callaway, Robert W. (Rob)	Divorced
Carter, Brandon J.	8/9/2002	17	Male	Carter, Teresa W.	Widowed
Carter, Michelle R.	11/17/2004	14	Female	Carter, Teresa W.	Widowed
Chung, Lina C.	4/11/2012	7	Female	Chung, Brian H.	Married
Collins, Bryan M.	6/19/2008	11	Male	Collins, James A.	Married
Collins, Kellie L.	8/23/2010	9	Female	Collins, James A.	Married
Fox, William D. (Billy)	2/5/2004	15	Male	Lewis, Patricia J. (Tricia)	Divorced
Gomez, Emilia B.	3/22/2006	13	Female	Gomez, Edgar A.	Married
Henry, Antonio J. (Tony)	9/6/2005	14	Male	Henry Jr., James P.	Married

Ministry

Introduction to Touchpoints

Overview

Touchpoints in Shepherd's Staff represent when a church contacts a person in an official capacity. This contact can take many different forms, such as a phone call, an email, a face-to-face meeting, or even an interaction social media. A touchpoint can be for an entire Household, or just one Individual. It can be useful to record these interactions because this lets you more easily keep track of how leadership at your church is engaging your congregation, and furthering the ministry of your church.

There are two classifications of touchpoints in Shepherd's Staff, Planned Touchpoints, and Completed Touchpoints.

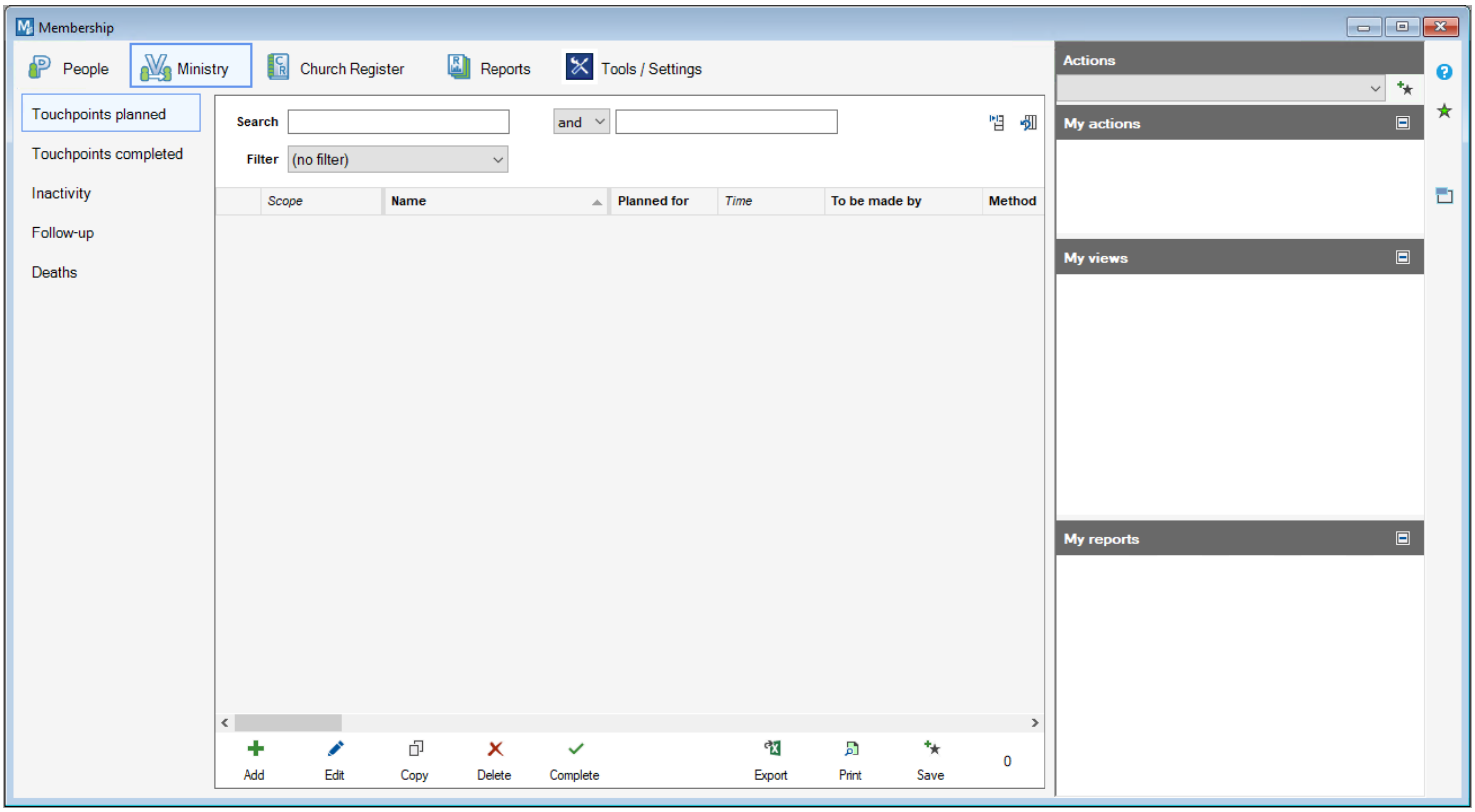
» Planned Touchpoints represent interactions that you have planned out in advance. Entering planned touchpoints can be useful to your church because this can represent a schedule of who is going to interact with a particular family, when this will happen, and how this communication will take place.

» Completed Touchpoints represent interactions you have had with a person or household. Entering completed touchpoints can be useful to your congregation because you can say what took place during this interaction, and have records of that in Shepherd's Staff.

Touchpoints Planned

The Touchpoints Planned grid shows all of the touchpoints that your church has planned out in advance, with details on who is going to be visiting a particular person or household, when this contact will be happening, and how this contact will be made. The Touchpoints planned grid can be searched using the standard search conventions.

In addition to being able to add, edit, and delete planned touchpoints. You can also copy existing planned touchpoints by clicking the "Copy" button. Once a planned touchpoint has happened, you can click the "Complete" button to turn the planned touchpoint into a completed touchpoint.



Add Planned Touchpoint

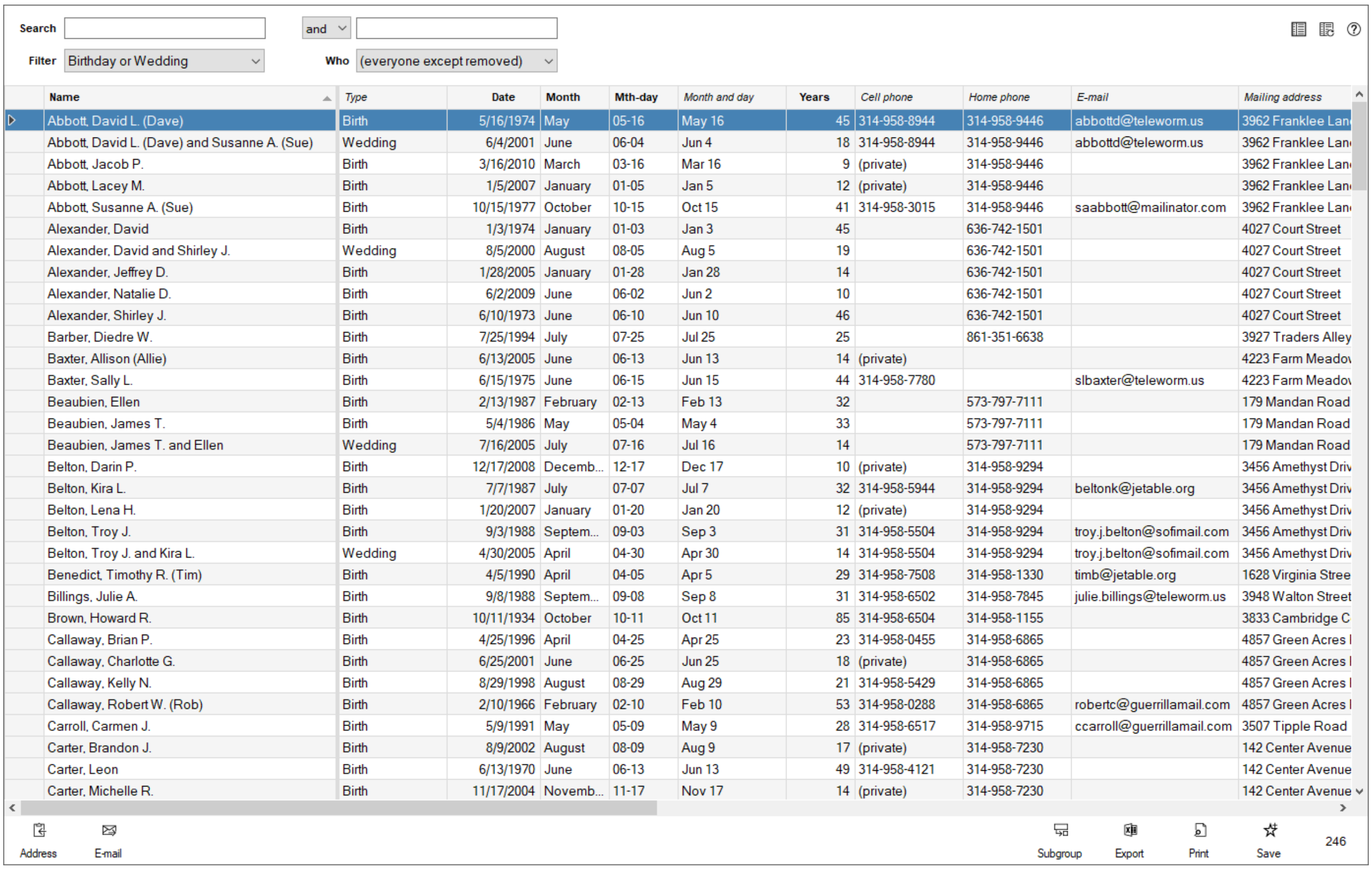
Adding a planned touchpoint takes place on the Touchpoints view. You would add a planned touchpoint any time you are planning to contact a person or household in your congregation.

1. In the Touchpoints Planned view, click the "Add" button and select if you are entering a Household or Individual touchpoint
2. Select the Person you are planning the touchpoint for in the person field, as well as entering the planned date and time for the touchpoint.
3. The category field allows you to select the reason for the touchpoint. You can add additional options by pressing the "Add/Remove an item from the list" button after clicking inside the Category field
4. The Method field lists what way the touchpoint will take place, such as a face-to-face meeting or email. You cannot add additional options to this field
5. To be made by says who will be initiating the touchpoint. This is an option field that you can add to by clicking the "Add/Remove an item from the list" button after clicking inside the field.
6. The Summary field allows you to enter a brief description of what the touchpoint will be for, the Location says where the touchpoint will occur at, and the Mileage tells you how far the person will have to travel (if at all).
7. If you want to add an additional planned touchpoint, check the "Add multiple?" box.
8. Click Save.

Touchpoints Completed

The Touchpoints Completed grid shows all of the touchpoints that your church has completed, with details on who visited a particular person or household, when this contact will be happened, and how this contact will be made. The Touchpoints completed grid can be searched using the standard search conventions.

In addition to being able to add, edit, and delete planned touchpoints. You can also copy existing completed touchpoints by clicking the "Copy" button.



Name	Type	Date	Month	Mth-day	Month and day	Years	Cell phone	Home phone	E-mail	Mailing address
Abbott, David L. (Dave)	Birth	5/16/1974	May	05-16	May 16	45	314-958-8944	314-958-9446	abbottd@teleworm.us	3962 Franklee Lan
Abbott, David L. (Dave) and Susanne A. (Sue)	Wedding	6/4/2001	June	06-04	Jun 4	18	314-958-8944	314-958-9446	abbottd@teleworm.us	3962 Franklee Lan
Abbott, Jacob P.	Birth	3/16/2010	March	03-16	Mar 16	9	(private)	314-958-9446		3962 Franklee Lan
Abbott, Lacey M.	Birth	1/5/2007	January	01-05	Jan 5	12	(private)	314-958-9446		3962 Franklee Lan
Abbott, Susanne A. (Sue)	Birth	10/15/1977	October	10-15	Oct 15	41	314-958-3015	314-958-9446	saabbott@mailinator.com	3962 Franklee Lan
Alexander, David	Birth	1/3/1974	January	01-03	Jan 3	45		636-742-1501		4027 Court Street
Alexander, David and Shirley J.	Wedding	8/5/2000	August	08-05	Aug 5	19		636-742-1501		4027 Court Street
Alexander, Jeffrey D.	Birth	1/28/2005	January	01-28	Jan 28	14		636-742-1501		4027 Court Street
Alexander, Natalie D.	Birth	6/2/2009	June	06-02	Jun 2	10		636-742-1501		4027 Court Street
Alexander, Shirley J.	Birth	6/10/1973	June	06-10	Jun 10	46		636-742-1501		4027 Court Street
Barber, Diedre W.	Birth	7/25/1994	July	07-25	Jul 25	25		861-351-6638		3927 Traders Alley
Baxter, Allison (Allie)	Birth	6/13/2005	June	06-13	Jun 13	14	(private)			4223 Farm Meadov
Baxter, Sally L.	Birth	6/15/1975	June	06-15	Jun 15	44	314-958-7780		slbaxter@teleworm.us	4223 Farm Meadov
Beaubien, Ellen	Birth	2/13/1987	February	02-13	Feb 13	32		573-797-7111		179 Mandan Road
Beaubien, James T.	Birth	5/4/1986	May	05-04	May 4	33		573-797-7111		179 Mandan Road
Beaubien, James T. and Ellen	Wedding	7/16/2005	July	07-16	Jul 16	14		573-797-7111		179 Mandan Road
Belton, Darin P.	Birth	12/17/2008	Decemb...	12-17	Dec 17	10	(private)	314-958-9294		3456 Amethyst Driv
Belton, Kira L.	Birth	7/7/1987	July	07-07	Jul 7	32	314-958-5944	314-958-9294	beltonk@jetable.org	3456 Amethyst Driv
Belton, Lena H.	Birth	1/20/2007	January	01-20	Jan 20	12	(private)	314-958-9294		3456 Amethyst Driv
Belton, Troy J.	Birth	9/3/1988	Septem...	09-03	Sep 3	31	314-958-5504	314-958-9294	troy.j.belton@sofimail.com	3456 Amethyst Driv
Belton, Troy J. and Kira L.	Wedding	4/30/2005	April	04-30	Apr 30	14	314-958-5504	314-958-9294	troy.j.belton@sofimail.com	3456 Amethyst Driv
Benedict, Timothy R. (Tim)	Birth	4/5/1990	April	04-05	Apr 5	29	314-958-7508	314-958-1330	timb@jetable.org	1628 Virginia Stree
Billings, Julie A.	Birth	9/8/1988	Septem...	09-08	Sep 8	31	314-958-6502	314-958-7845	julie.billings@teleworm.us	3948 Walton Street
Brown, Howard R.	Birth	10/11/1934	October	10-11	Oct 11	85	314-958-6504	314-958-1155		3833 Cambridge C
Callaway, Brian P.	Birth	4/25/1996	April	04-25	Apr 25	23	314-958-0455	314-958-6865		4857 Green Acres
Callaway, Charlotte G.	Birth	6/25/2001	June	06-25	Jun 25	18	(private)	314-958-6865		4857 Green Acres
Callaway, Kelly N.	Birth	8/29/1998	August	08-29	Aug 29	21	314-958-5429	314-958-6865		4857 Green Acres
Callaway, Robert W. (Rob)	Birth	2/10/1966	February	02-10	Feb 10	53	314-958-0288	314-958-6865	robertc@guerrillamail.com	4857 Green Acres
Carroll, Carmen J.	Birth	5/9/1991	May	05-09	May 9	28	314-958-6517	314-958-9715	ccarroll@guerrillamail.com	3507 Tipple Road
Carter, Brandon J.	Birth	8/9/2002	August	08-09	Aug 9	17	(private)	314-958-7230		142 Center Avenue
Carter, Leon	Birth	6/13/1970	June	06-13	Jun 13	49	314-958-4121	314-958-7230		142 Center Avenue
Carter, Michelle R.	Birth	11/17/2004	Novemb...	11-17	Nov 17	14	(private)	314-958-7230		142 Center Avenue

Add Completed Touchpoint

Adding a completed touchpoint takes place on the Touchpoints view. You would add a completed touchpoint any time you have made contact with someone in your congregation in an official capacity and you want to record the details.

1. In the Touchpoints Completed view, click the "Add" button and select if you are entering a Household or Individual touchpoint
2. Select the Person you are adding the touchpoint for in the person field, as well as entering the date and time for the touchpoint.
3. The category field allows you to select the reason for the touchpoint. You can add additional options by pressing the "Add/Remove an item from the list" button after clicking inside the Category field
4. The Method field lists what way the touchpoint took place, such as a face-to-face meeting or email. You cannot add additional options to this field
5. Made by says who initiated the touchpoint. This is an option field that you can add to by clicking the "Add/Remove an item from the list" button after clicking inside the field.
6. The Summary field allows you to enter a brief description of what the touchpoint was planned to be for, the Location says where the touchpoint occurred at, and the Mileage tells you how far the person will have to travel (if at all). The completed touchpoint details field provides a description of what happened at the touchpoint.
7. If you want to add an additional completed touchpoint, check the "Add multiple?" box.
8. Click Save.

Add/Edit Deaths

When a person passes away, after you have recorded their death in their person record, you may want to add a death record in the Ministry section to record who this death affected so your church can care for the affected people.

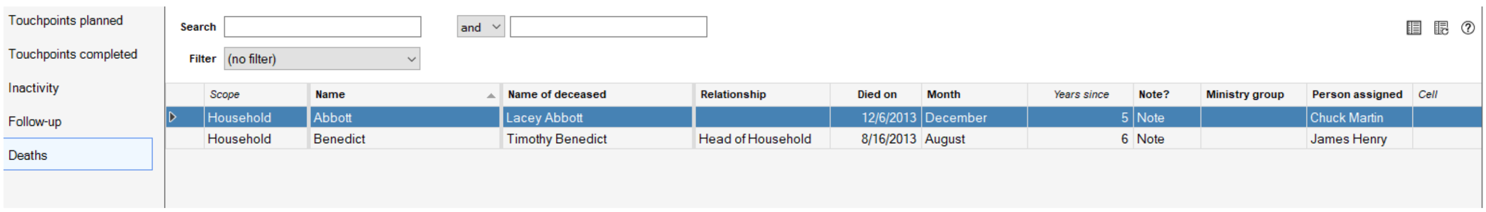
1. In the Ministry section, click the Deaths Tab. Click the Add button to add a new Death record, or to edit an existing death record, select the record you want to change and click Edit.
2. If adding a new death record, select if the death affects an individual or a household
3. In the Person/Household affected field, select the person/household that this death impacts. You will also need to fill in the date of the death, and the name of the deceased
4. In the relationship field, select how the affected person/household was connected to the deceased. If you need to add new options, click inside the field and click the "Add/Remove an item from the list"
5. If you would like to add any additional notes, click the notes button and add them there.
6. Click Save to save your record.

Deaths

The Deaths view allows you to record deaths that impact entire households, or just individuals within a given household. By using this view, churches can record details of who might be affected by a death, and then provide the information necessary to help care for these families and individuals.

From this view, you can quickly get contact information on the affected individual or household, the name of the deceased and their relationship to the individual or household. The deaths view can be searched using the search bars at the top of the grid using the standard search conventions.

In addition to being able to add, edit and delete information on deaths, you can also copy an individual or household's address by selecting their significant death record and then clicking the "Address" button at the bottom of the grid. You can email the individual or household in the same way, by clicking the "E-mail" button instead. You can also enter a planned touchpoint for the affected individual or household by clicking the "Plan" button.



Inactivity

The Inactivity view allows you to search for people, based on specific criteria that would make them be considered inactive by your church, and get information on when these people have last contributed, attended or have had contact with your church, and also provides contact information for these people, and provides ways you can reach them.

1. Access the Inactivity view by clicking on the Ministry tab and choose "Inactivity"
2. In the inactivity view, select what filters you want to use to determine who your inactive people are. These filters include

Who - This filter allows you to select from a list of pre-defined groups of people, or a smart group or list/grade.

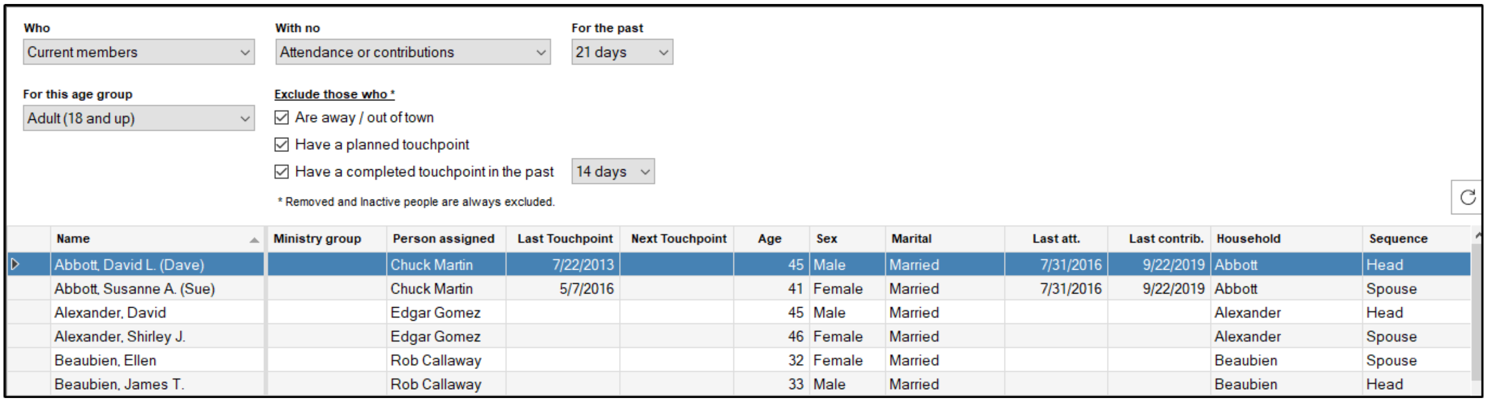
With no - This filter allows you to determine what a person hasn't done to be considered inactive. You can choose from not attending, not contributing, a combination of not attending and not contributing, or not having present participation in an activity.

For the past - This field works in conjunction with the previous field. This looks at the previous field and allows you to see if they haven't participated within a certain number of days between 7 and 180 days.

For this age group - This field allows you to pick a particular age group to include in your list of inactive people. You can select all people, a particular pre-set range of ages, or people who do not have a birth date listed.

Exclude those who - These checkboxes allow you to exclude people who meet certain conditions. "Are away/out of town" will exclude anyone who has a currently active alternate address. "Have a planned touchpoint" will exclude anyone who has a touchpoint in the "Touchpoints planned view". Have a completed touchpoint in the past" with an option field where you can select how many days ago this completed touchpoint happened. This option will exclude anyone from your list of inactive people who have a completed touchpoint within the select amount of days.

1. After selecting each filter that you would like to use, Shepherd's Staff will automatically use the selected criteria to display the people who meet the criteria of the filters you selected.
2. Clicking the print button will allow you to print a report that shows each person's name along with Membership and Contact information. This report can be grouped by person, household, ministry group or person assigned, and there is also a mailing label option available from here.
3. You can also click on a person in the grid and click the plan button to create a planned touchpoint for that person.



Name	Ministry group	Person assigned	Last Touchpoint	Next Touchpoint	Age	Sex	Marital	Last att.	Last contrib.	Household	Sequence
Abbott, David L. (Dave)		Chuck Martin	7/22/2013		45	Male	Married	7/31/2016	9/22/2019	Abbott	Head
Abbott, Susanne A. (Sue)		Chuck Martin	5/7/2016		41	Female	Married	7/31/2016	9/22/2019	Abbott	Spouse
Alexander, David		Edgar Gomez			45	Male	Married			Alexander	Head
Alexander, Shirley J.		Edgar Gomez			46	Female	Married			Alexander	Spouse
Beaubien, Ellen		Rob Callaway			32	Female	Married			Beaubien	Spouse
Beaubien, James T.		Rob Callaway			33	Male	Married			Beaubien	Head

Follow-up

The Follow-up view allows you to search for people based on specific criteria with the intention of reaching out to those people. This is frequently used for first-time visitors at a church to help encourage those visitors to come back and become members. This view gives you information on when these people have last attended, last been visited and it also provides contact information for these people.

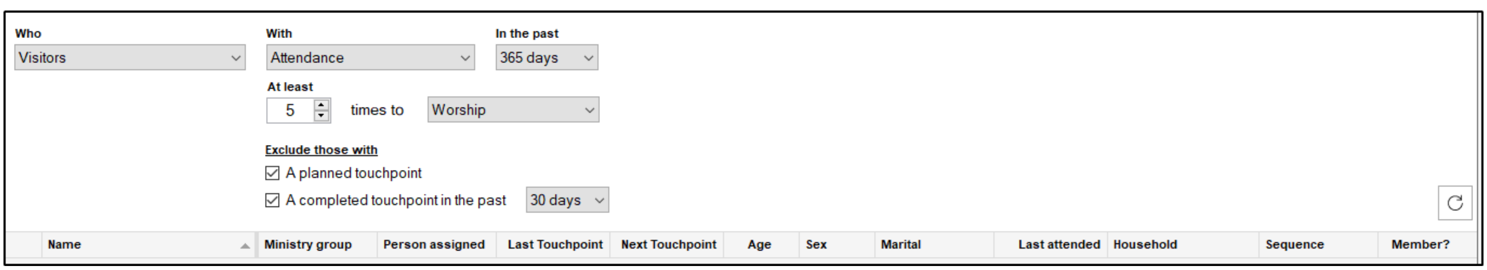
1. Access the Follow-up view by clicking on the Ministry Tab and choosing "Follow-up"
2. In the Follow-up view, select what filters you want to use to determine what people you need to follow up with. These filters include:

Who - This filter allows you to select from pre-defined groups of people, including visitors, as well as subgroups and lists/grades.

With - This filter allows you to choose what reason you would want to follow up with people. Depending on what option you select here, you may have additional filters appear. You can select people who have no completed touchpoints, no attendance, attendance or their person record was added within a date range.

In the past - This filter lets you set the date range of the previous field. You can select ever to see if the person ever met the criteria in the With field, or choose day intervals up to 365 days.

At least (Only available when you choose Attendance) - This field allows you to select how many times a person had to attend to appear on your follow-up list. Select the number of times they had to attend and what attendance type (or anything for a combination of all attendance types) counts towards this attendance.



Exclude those with - These checkboxes allow you to exclude people from your follow up list who meet certain conditions. "A planned touchpoint" will exclude anyone from your follow-up list who has a planned touchpoint in the Touchpoints planned view. "A completed touchpoint in the past" with an option field where you can select how many days ago the completed touchpoint happened (This checkbox is not available if using the "No completed touchpoints" option in the with field) will exclude anyone who has a completed touchpoint within the selected date range.

1. After selecting each filter you would like to use, Shepherd's Staff will automatically use the selected criteria to display the people who meet the criteria of the filters you selected.
2. Clicking the print button will allow you to print a report that shows each person's name along with Membership and Contact information. This report can be grouped by person, household, ministry group or person assigned, and there is also a mailing label option available from here.

3. You can also click on a person in the grid and click the plan button to create a planned touchpoint for that person.

Church Register

Introduction to Church Register

The Church Register allows the church to record significant events and keep them permanently. Churches usually have a "Big Book" that these events are recorded in and this is a way to record the events electronically in a database.

These records need to be manually keyed in and this actually allows you to keep records for people that do not have records in Membership. Weddings and Baptisms, for example, often involve people that may not be in the church's database. With the Church Register, participants in such events can be recorded within the Event record without having to add them to Membership.

The Church Register records:

» Weddings

» Funerals

» Baptisms

» Ministers / Clergy

» Officers

» Historical Events

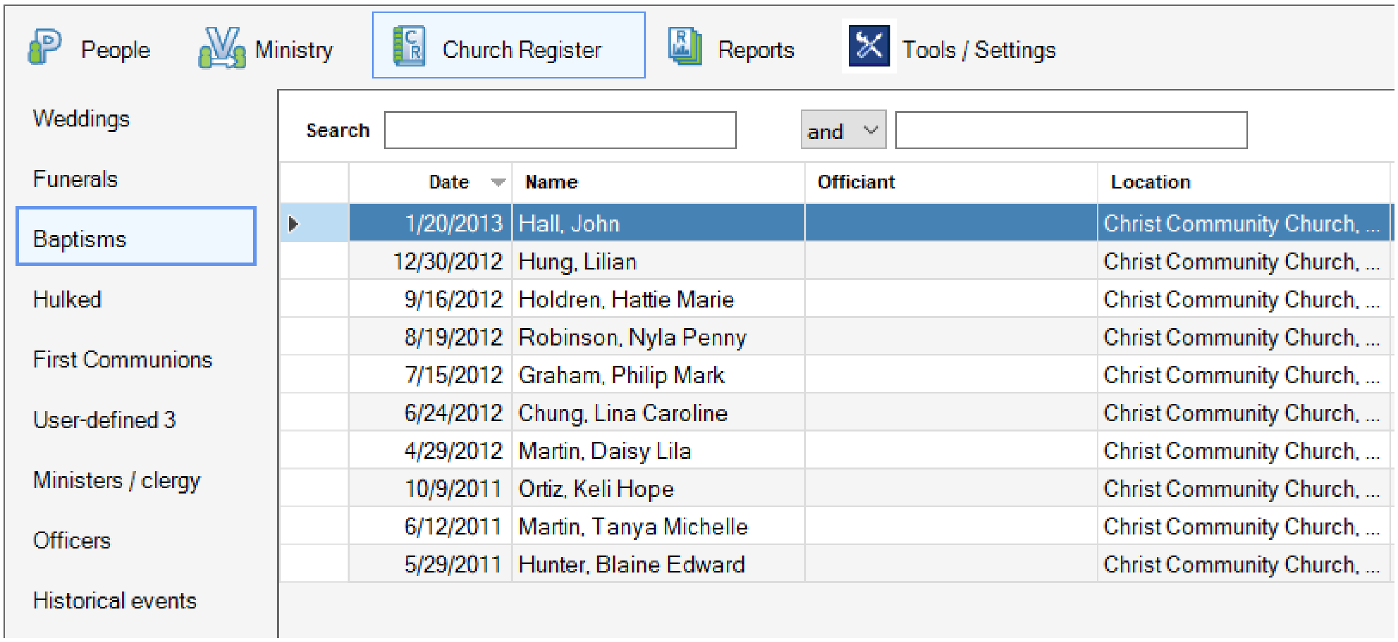
Also, there are three User-Defined fields that can be renamed to anything the church wants to record. They default to Confirmed, First Communion, and User-Defined 3.

Note: The Church Register is a stand alone grid so none of the information entered will be automatically changed in the Person record and vice-versa. Moreover, the Register records are not affected by year end or the removal of a person.

Baptisms

The Baptisms View in the Church Register section of the Membership module is a space where you can enter additional data on baptisms that occurred at your church. This includes information on the name of the baptized person, date of baptism, location and officiants as well as other important information.

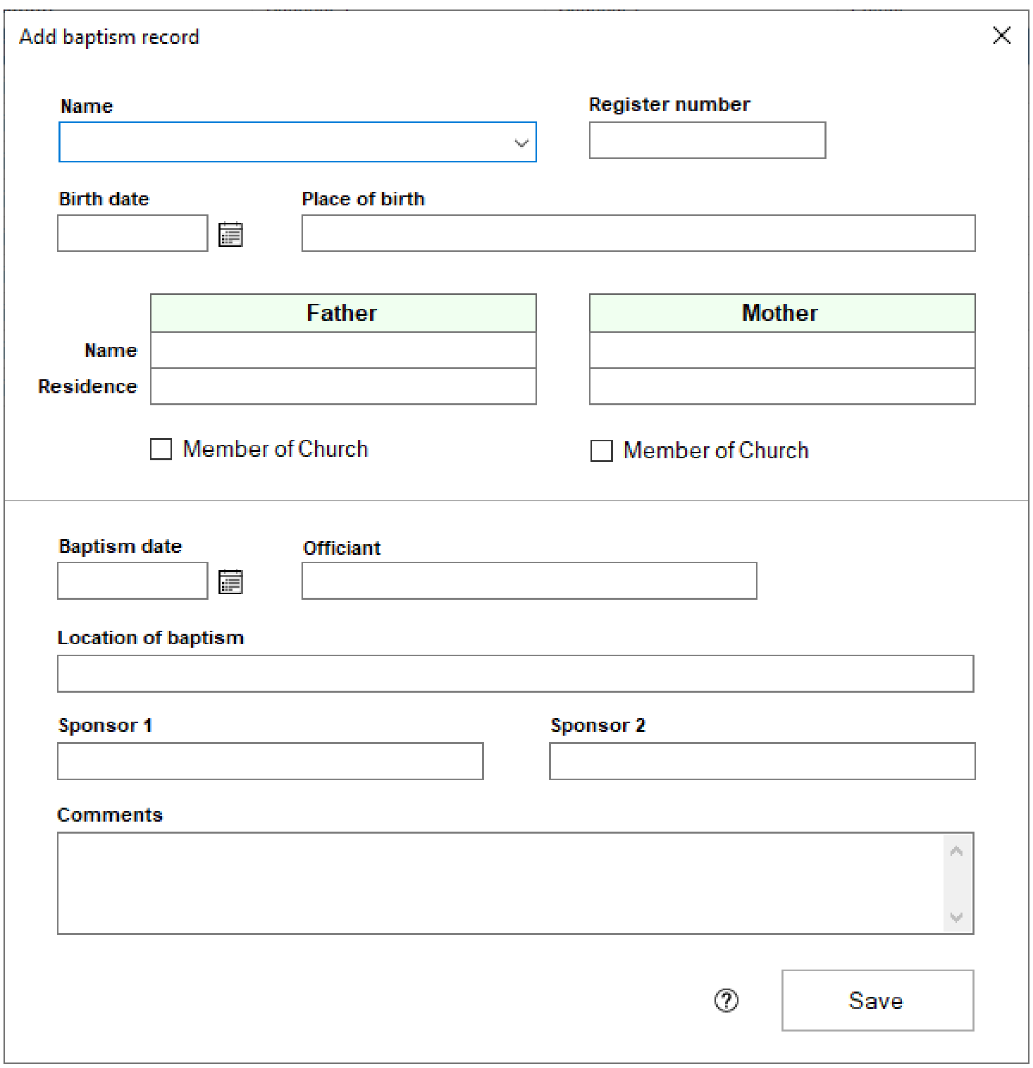
The Baptisms view can be searched by using the search bars at the top of the grid by using the standard search conventions.



Add/Edit Baptism

Adding Baptisms to the Baptism view can be accomplished by opening the Baptism view, clicking the add button at the bottom of the grid, and filling in each piece of information that the next window requires, and you can edit any baptism that has been entered previously by double clicking on the baptism record.

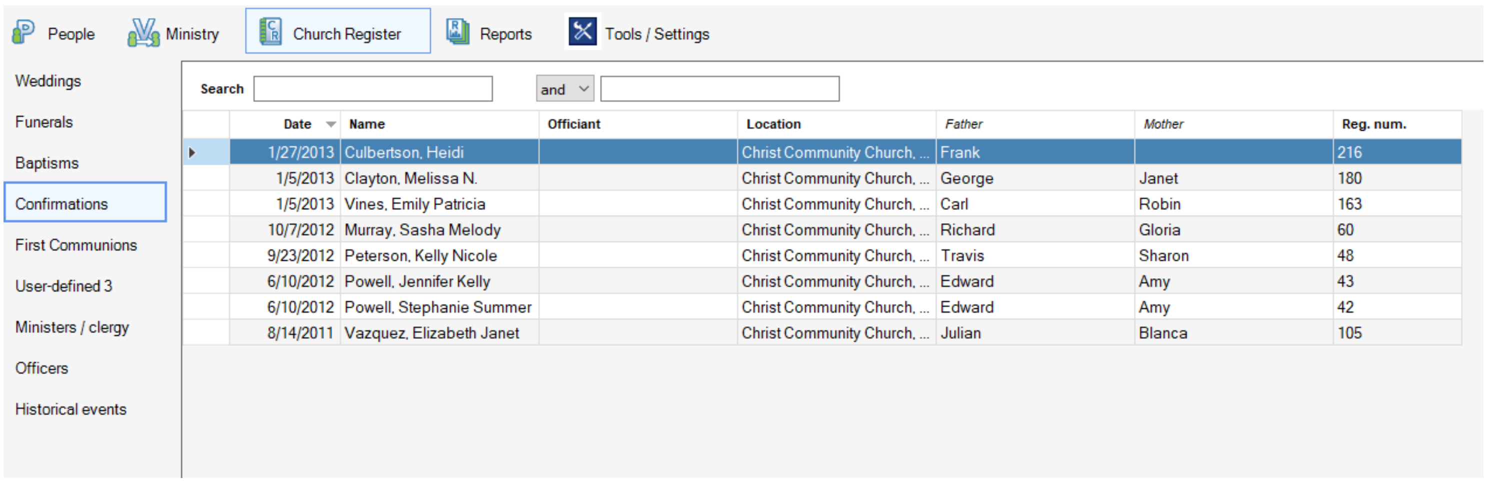
1. The first step is to make sure that the person you are entering a baptism for has been entered as a person. If this is not true, first add the person record for the person you are adding a baptism record for.
2. In the Church Register section of Membership, click on Baptisms and click "Add"
3. Select the person who you are entering the baptism record for in the Name field. Their Register Number, Birth date, Name of Father and Mother, and Baptism date will be filled in automatically if entered in their Person Record.
4. Fill in the remaining fields with the appropriate information for the baptism.
5. Click Save when finished.



Confirmed

The Confirmed View in the Church Register section of the Membership module is a space where you can enter additional data on Confirmations that occurred at your church. This includes information on the confirmed person, including the name of the confirmed, the date they were confirmed, the officiant and other important information.

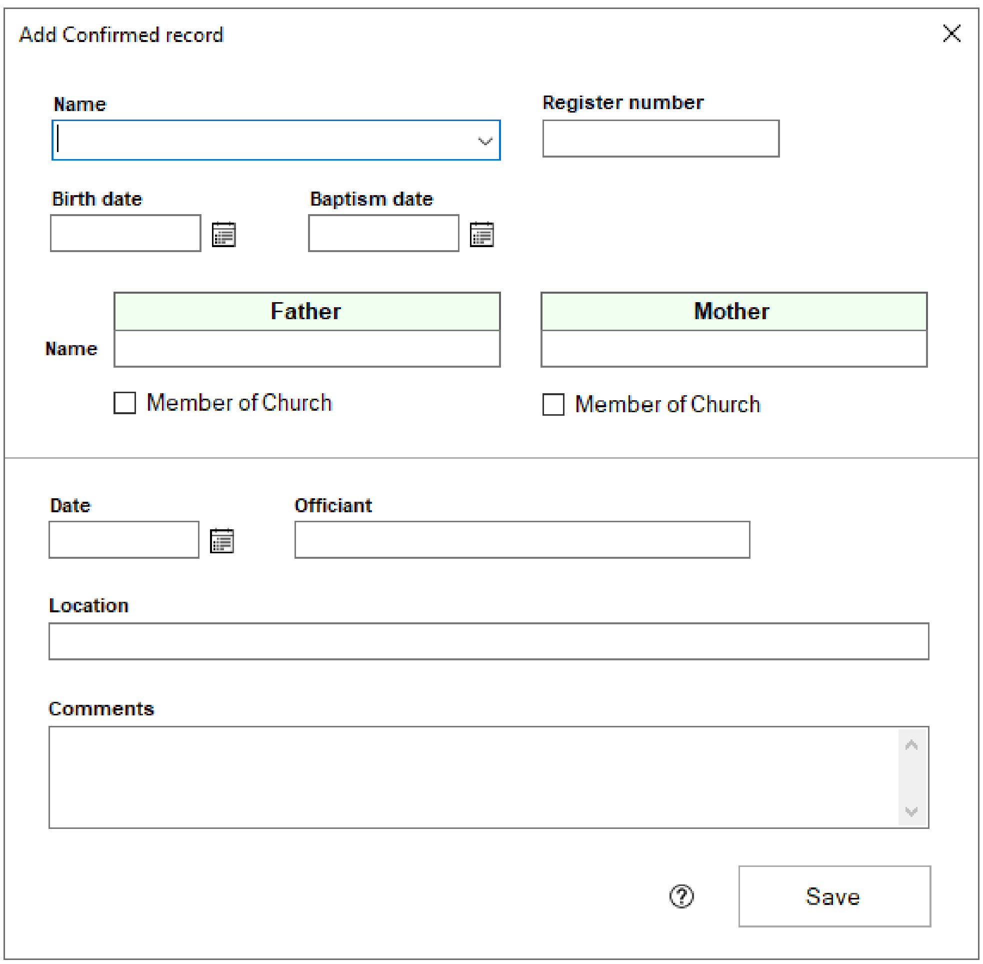
The Confirmed view can be searched by using the search bars at the top of the grid by using the standard search conventions.



Add/Edit Confirmation

Adding Confirmations to the Confirmations view can be accomplished by opening the Confirmations view, clicking the add button at the bottom of the grid, and filling in each piece of information that the next window requires, and you can edit any Confirmation that has been entered previously by double clicking on the Confirmation record.

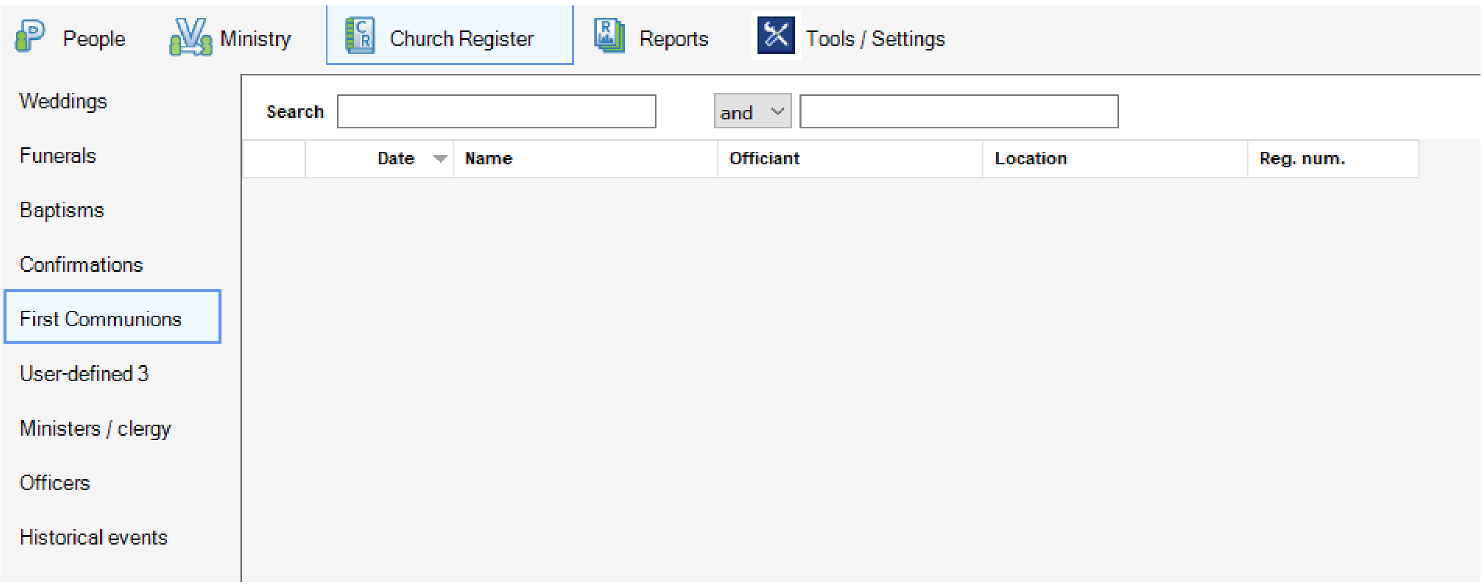
1. The first step is to make sure that the person you are entering a confirmation for has been entered as a person. If this is not true, first add the person record for the person you are adding a baptism record for.
2. In the Church Register section of Membership, click on Confirmations and click "Add"
3. Select the person who you are entering the Confirmation record for in the Name field. Their Register Number, Birth date, Name of Father and Mother, and Date will be filled in automatically if entered in their Person Record.
4. Fill in the remaining fields with the appropriate information for the confirmation.
5. Click Save when finished.



First Communion

The First Communion View in the Church Register section of the Membership module is a space where you can enter additional data on a person's First Communion that occurred at your church. This includes information including the name of the person taking their first communion, the date this occurred, the officiant, and other important information

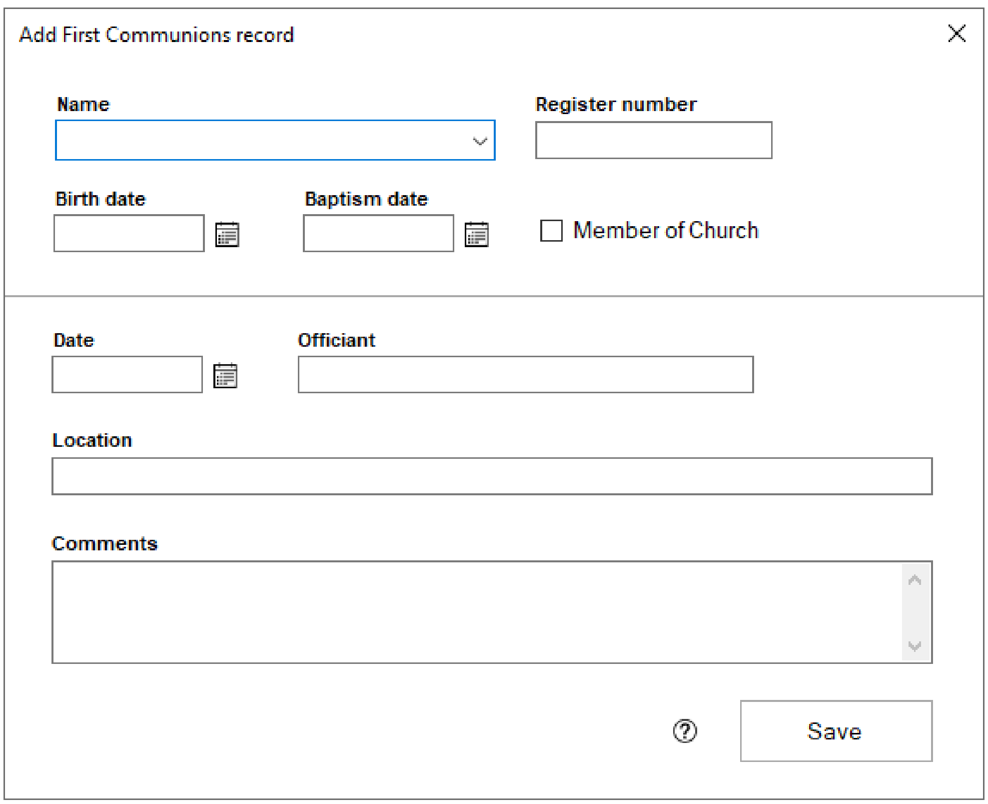
The First Communion view can be searched by using the search bars at the top of the grid by using the standard search conventions.



Add/Edit First Communion

Adding a First Communion to the First Communion view can be accomplished by opening the First Communion view, clicking the add button at the bottom of the grid, and filling in each piece of information that the next window requires, and you can edit any First Communion that has been entered previously by double clicking on the baptism record.

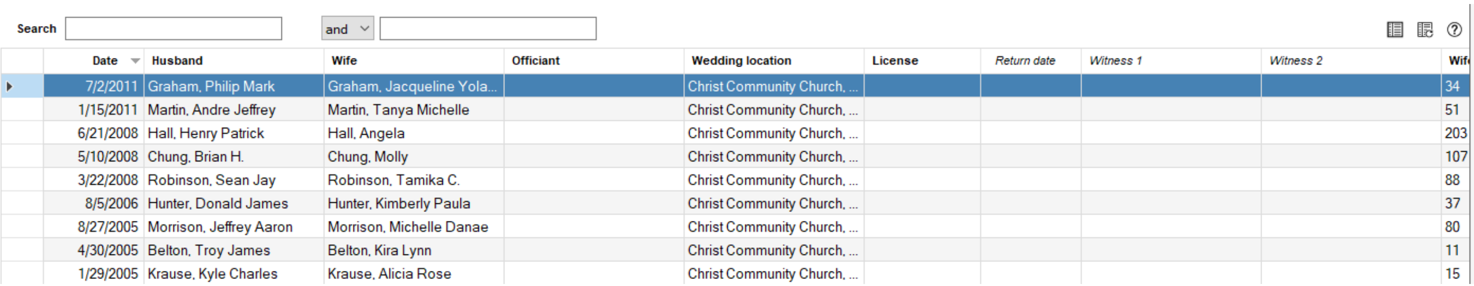
1. The first step is to make sure that the person you are entering a First Communion for has been entered as a person. If this is not true, first add the person record for the person you are adding a First Communion record for.
2. In the Church Register section of Membership, click on First Communion and click "Add"
3. Select the person who you are entering the First Communion record for in the Name field. Their Register Number, Birth date, Name of Father and Mother, and Baptism date will be filled in automatically if entered in their Person Record.
4. Fill in the remaining fields with the appropriate information for the First Communion.
5. Click Save when finished.



Weddings

The Weddings View in the Church Register section of the Membership module is a space where you can enter additional data on weddings that occurred at your church. This includes information on the Husband, Wife, and Officiant as well as other information.

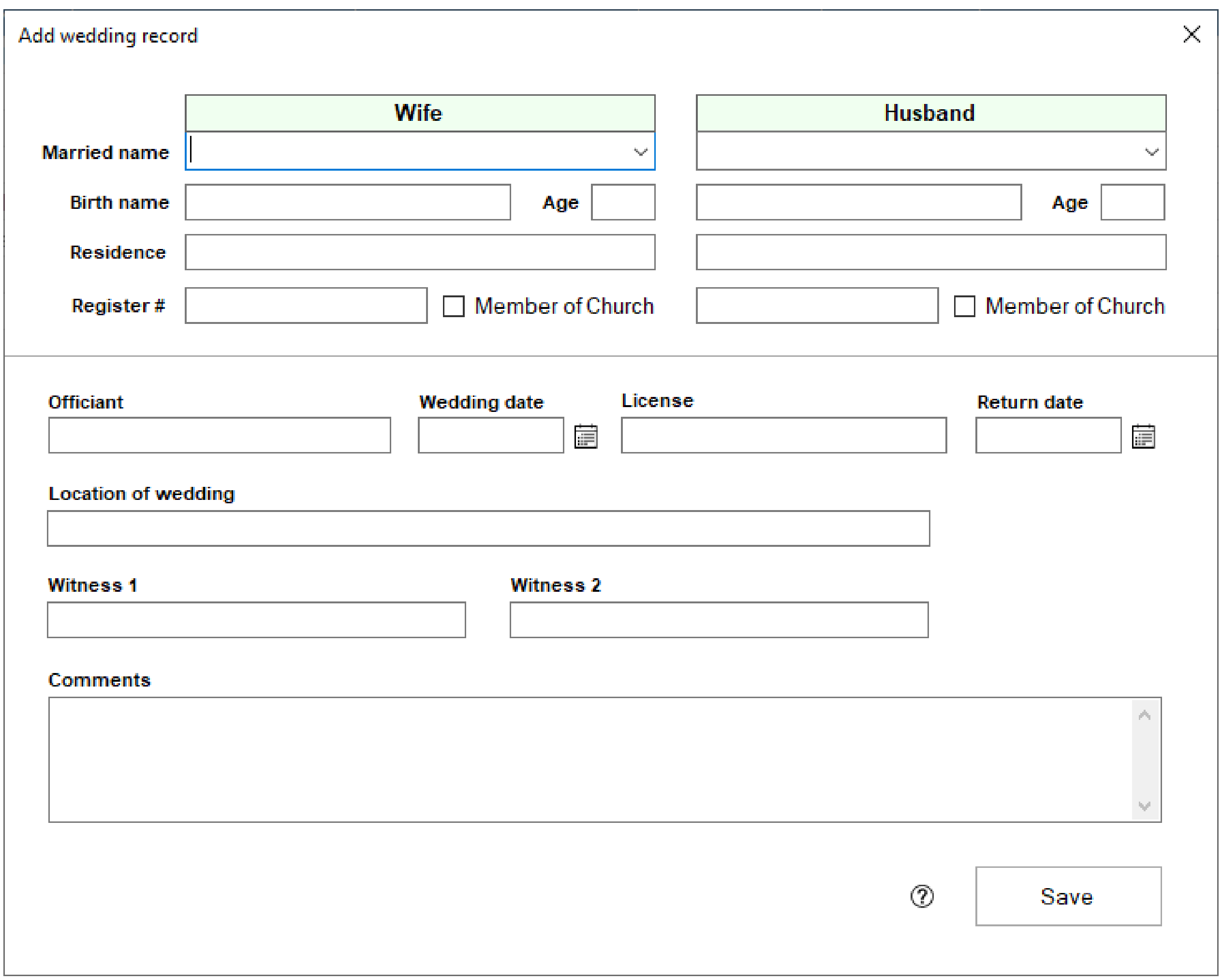
The weddings view can be searched by using the search bars at the top of the grid by using the standard search conventions.



Add/Edit Weddings

Adding Weddings to the Wedding view can be accomplished by opening the wedding view, clicking the add button at the bottom of the grid, and filling in each piece of information that the next window requires, and you can edit any wedding that has been entered previously by double clicking on the wedding record.

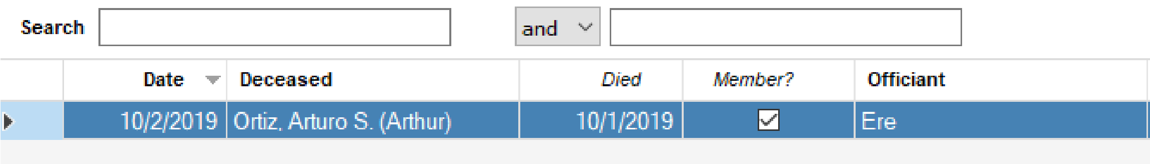
1. The first step is to make sure that both people who are to be married have been entered into Shepherd's Staff as people. If this is not true, first, go and add the person record(s) for the people you are adding.
2. In the Church Register section of Membership, click on Weddings and click "Add"
3. Select the who the wife and husband are from the option fields for "Married Name" for both wife and husband. When you select the names, if the data for Birth Name (based on the prior Surname field), Age (based on their Birth Date, this will display the person's current age, not the age at the date of their wedding, so you can adjust if needed), Residence (based on their household Address) and Register Number (based on the Register Number field in the person record). If the selected people are members of the church, the Member of Church box will be checked automatically
4. Fill in the remaining fields with the appropriate information for the couple. If the couple have a wedding date already filled in their person records, this will be filled in automatically.
5. Click Save when finished.



Funerals

The Funerals View in the Church Register section of the Membership module is a space where you can enter additional data on Funerals that occurred at your church. This includes information on the deceased, officiant and location of the funeral, interment and place of death.

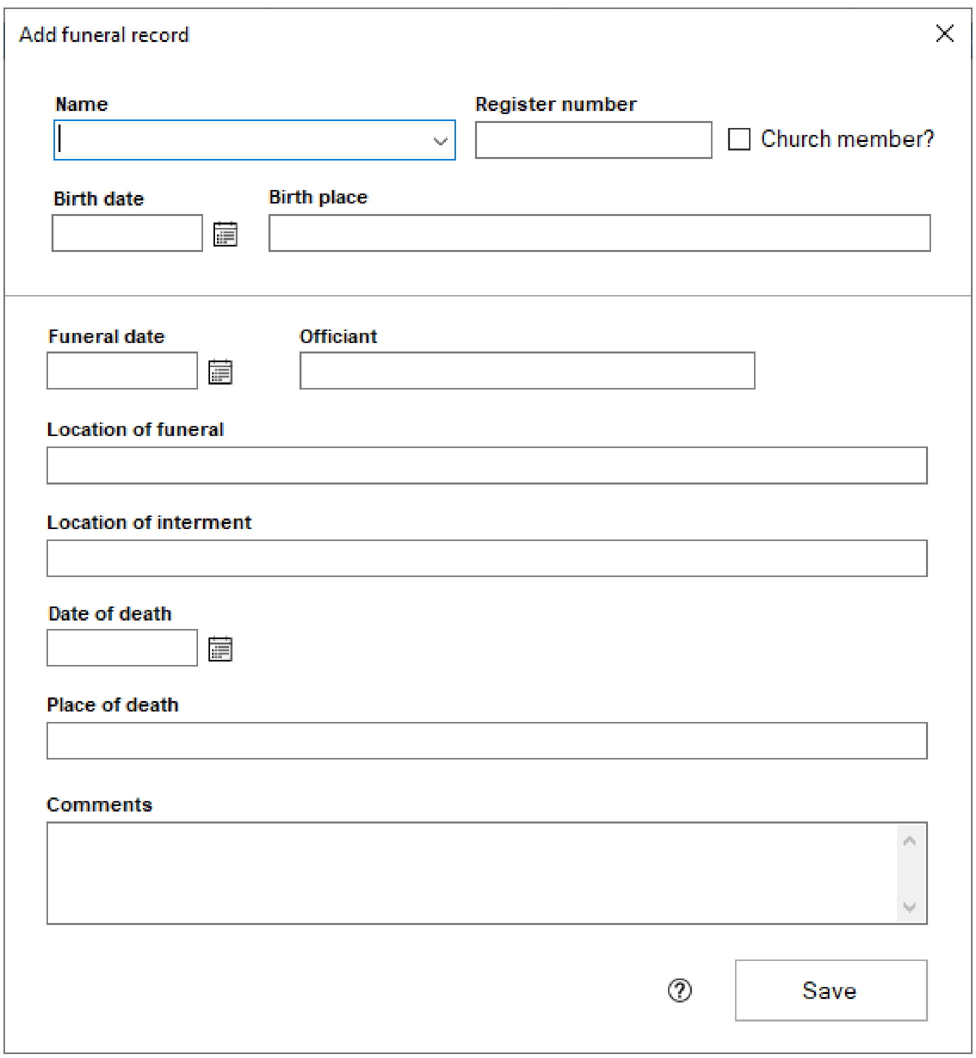
The Funerals view can be searched by using the search bars at the top of the grid by using the standard search conventions.



Add/Edit Funeral

Adding Funerals to the Funerals view can be accomplished by opening the funerals view, clicking the add button at the bottom of the grid, and filling in each piece of information that the next window requires, and you can edit any funeral that has been entered previously by double clicking on the funeral record.

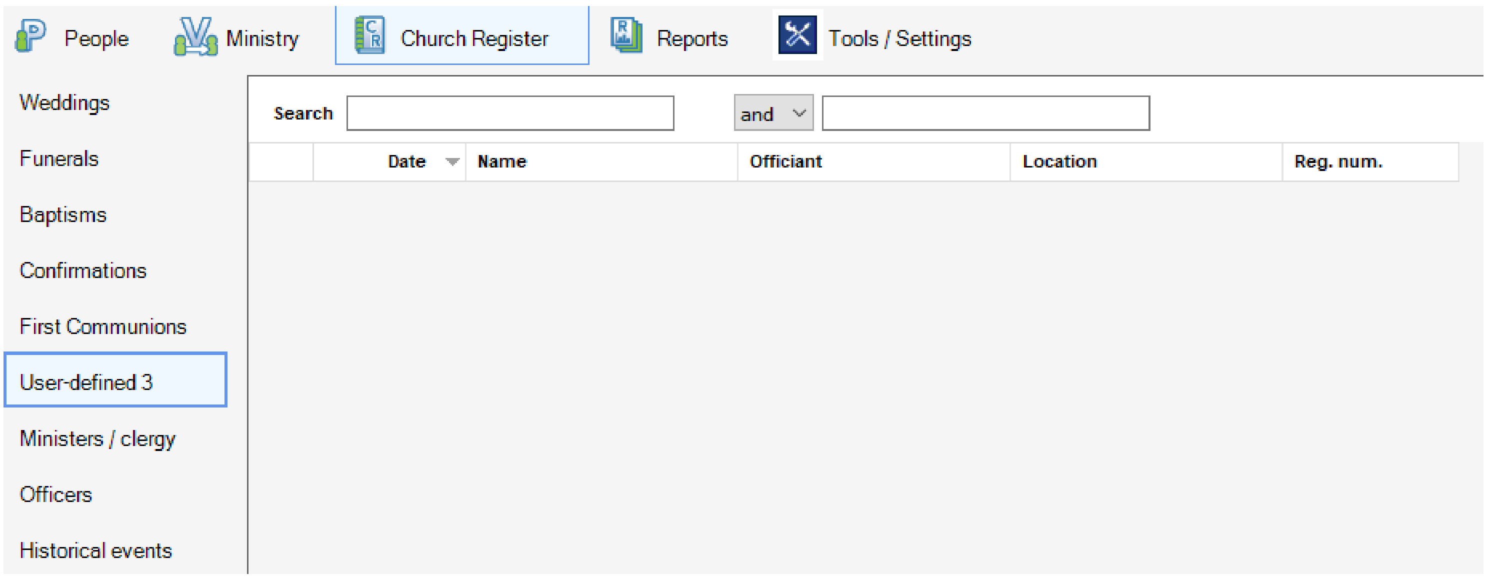
1. The first step is to make sure that the person you are entering the funeral for is listed in Shepherd's Staff. If this is not true, add the person record for the person you are entering the funeral for.
2. In the Church Register section of Membership, click on Funerals and click "Add"
3. Select the name of the person you are entering the funeral for in the Name field. Their Register number), Birth date and Date of Death will automatically be filled in if it was entered in their person record.
4. Fill in the remaining fields with the appropriate information for the funeral.
5. Click Save when finished.



User-defined 3

The User-defined 3 view in the Church Register section of the Membership module is a space where you can enter additional data on an event of your choosing that occurred at your church. This includes information including the name of the person this event was for, the date this event occurred, the officiant, and other important information

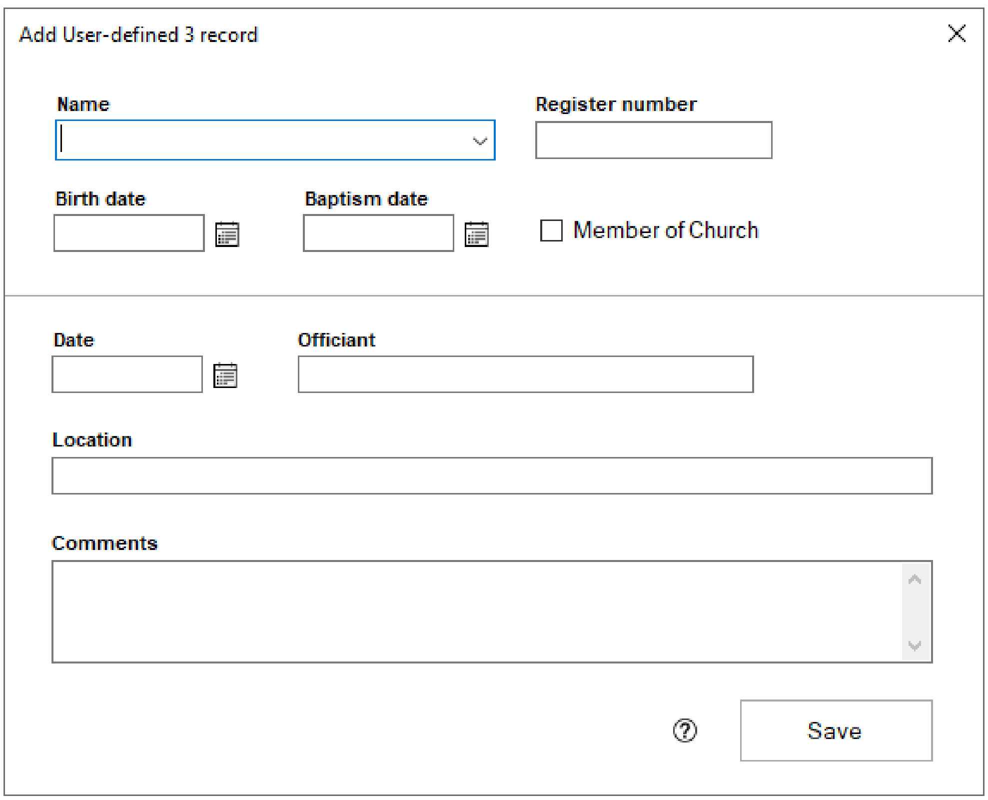
The User-defined 3 view can be searched by using the search bars at the top of the grid by using the standard search conventions. The name of the User-Defined 3 view can be changed in the Customize field names section inside the Tools/Settings Menu.



Add/Edit User-defined 3

Adding events to the to the User-defined 3 view can be accomplished by opening the User-defined 3 view, clicking the add button at the bottom of the grid, and filling in each piece of information that the next window requires, and you can edit any event that has been entered previously by double clicking on the event record.

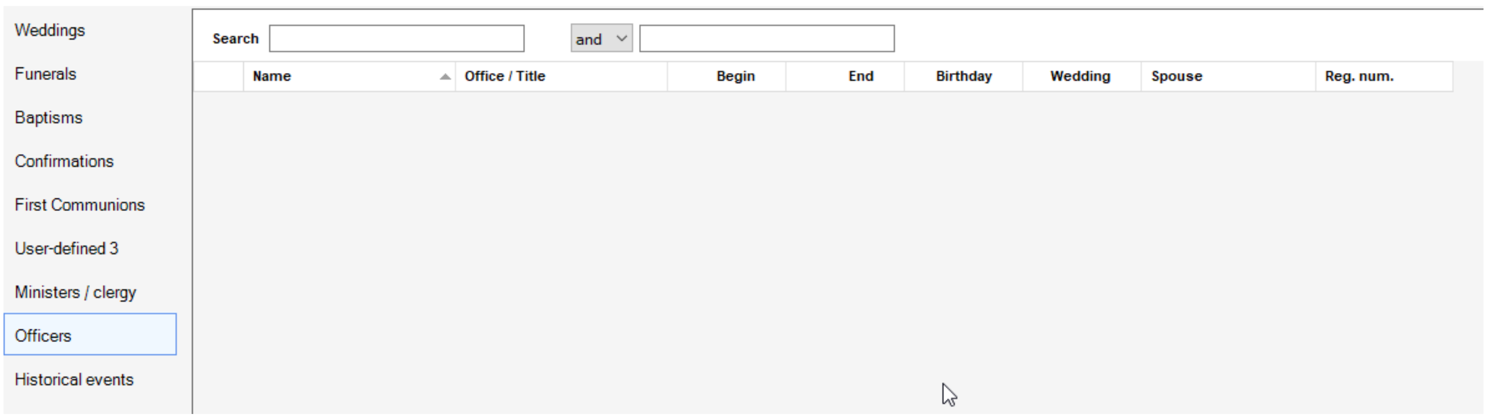
1. The first step is to make sure that the person you are entering an event for has been entered as a person. If this is not true, first add the person record for the person you are adding an event record for.
2. In the Church Register section of Membership, click on User-defined 3 and click "Add"
3. Select the person who you are entering the event record for in the Name field. Their Register Number, Birth date, and Baptism date will be filled in automatically if entered in their Person Record.
4. Fill in the remaining fields with the appropriate information for the event.
5. Click Save when finished.



Officers

The Officers view in the Church Register section of the Membership module is a space where you can enter data on a person who hold an official position at your church. The position held is usually non-pastoral in nature, such as a Church Secretary. This includes information including the name of the person who holds the position, the date they started the position, the date they left the position, and their official title, as well as other important information.

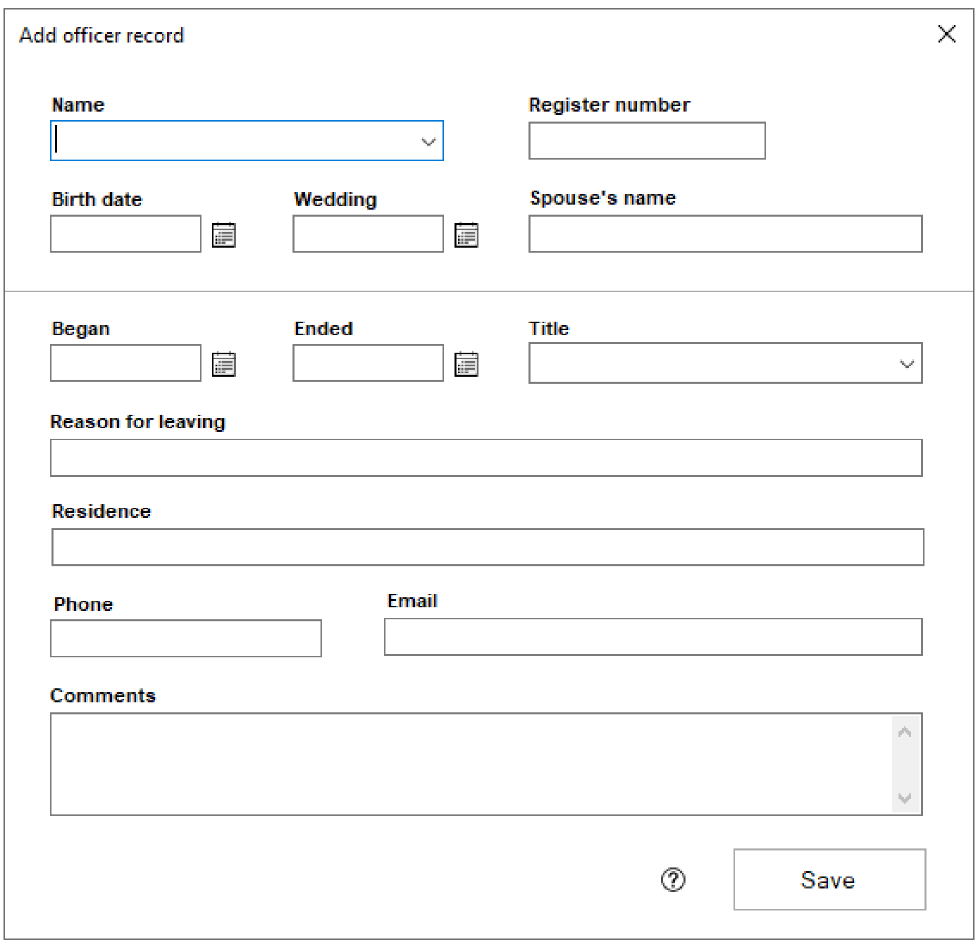
The Minister/Clergy view can be searched by using the search bars at the top of the grid by using the standard search conventions.



Add/Edit Officers

Adding a person to the Officers view can be accomplished by opening the Officers view, clicking the add button at the bottom of the grid, and filling in each piece of information that the next window requires, and you can edit any record that has been entered previously by double clicking on the Officer record.

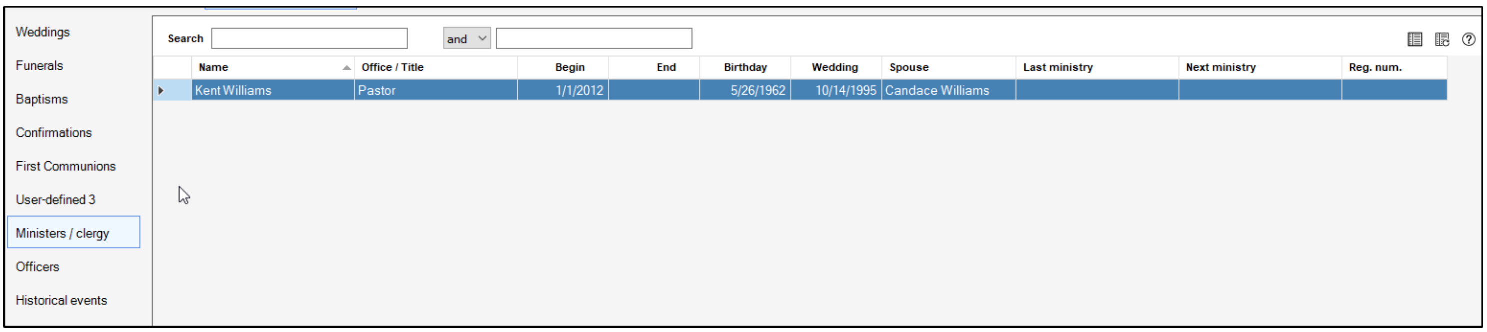
1. The first step is to make sure that the person you are entering into the Officers view has been entered as a person. If this is not true, first add the person record for the person you are adding a Officer record for.
2. In the Church Register section of Membership, click on Officers and click "Add"
3. Select the person who you are entering the Officer record for in the Name field. Their Register Number, Birth date, Wedding, Spouse's name and Phone will be filled in automatically if entered in their Person Record.
4. Fill in the remaining fields with the appropriate information for the Officer record. The title field is an option field that you can add new positions to.
5. Click Save when finished



Ministers/Clergy

The Ministers/Clergy View in the Church Register section of the Membership module is a space where you can enter data on a person who hold an official, ordained position at your church. The position held is pastoral in function. This includes information including the name of the person who holds the position, the date they started the position, the date they left the position, and their official title, as well as other important information.

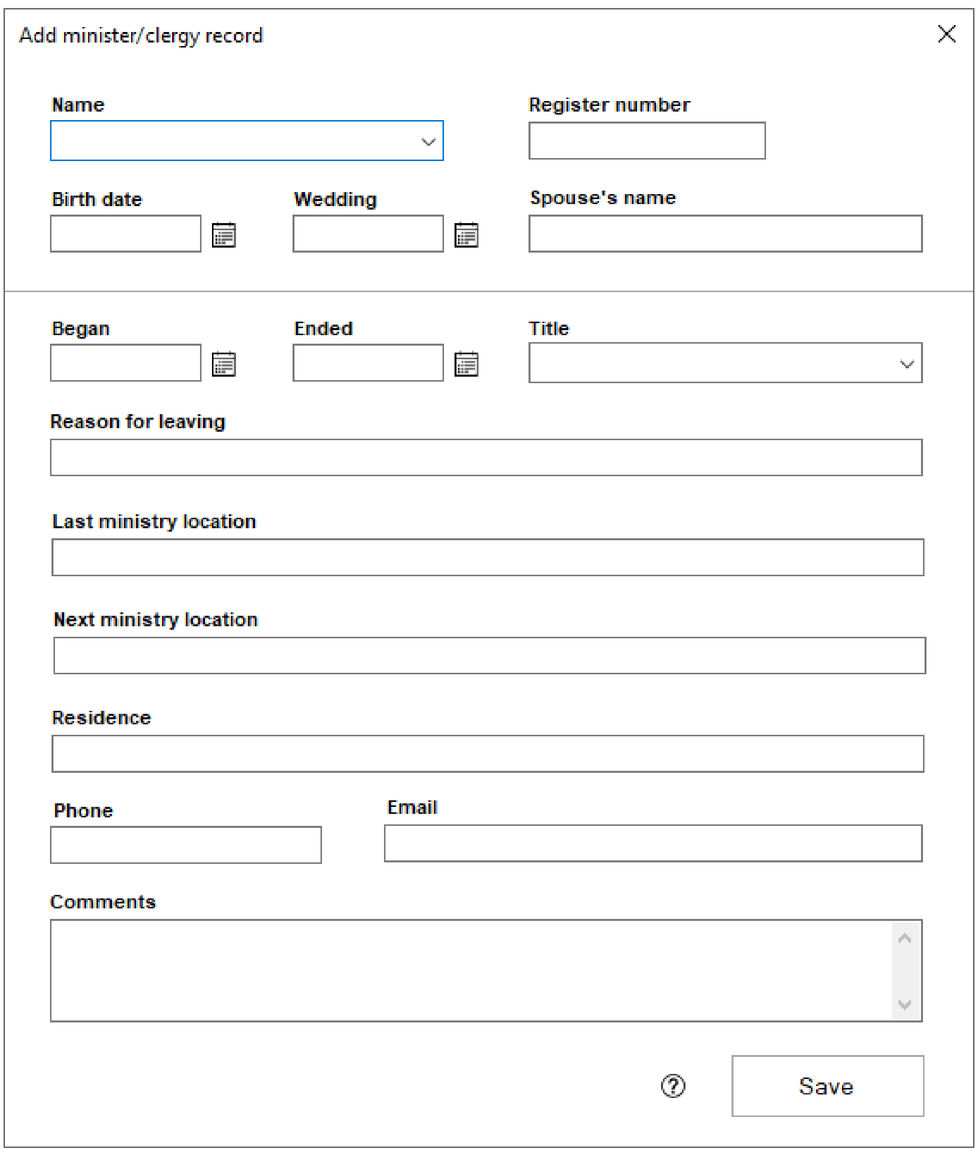
The Minister/Clergy view can be searched by using the search bars at the top of the grid by using the standard search conventions.



Add/Edit Ministers/clergy

Adding a person to the Ministers/clergy view can be accomplished by opening the Ministers/clergy view, clicking the add button at the bottom of the grid, and filling in each piece of information that the next window requires, and you can edit any record that has been entered previously by double clicking on the Ministers/clergy record.

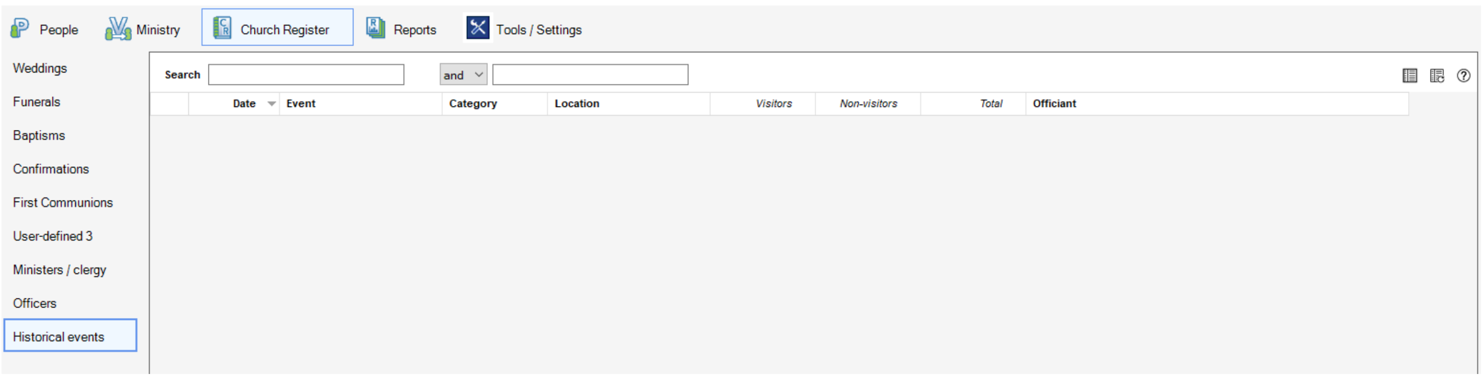
1. The first step is to make sure that the person you are entering into the Ministers/clergy view has been entered as a person. If this is not true, first add the person record for the person you are adding a Ministers/clergy record for.
2. In the Church Register section of Membership, click on Ministers/clergy and click "Add"
3. Select the person who you are entering the Ministers/clergy record for in the Name field. Their Register Number, Birth date, Wedding, Spouse's name and Phone will be filled in automatically if entered in their Person Record.
4. Fill in the remaining fields with the appropriate information for the Ministers/clergy record. The title field is an option field that you can add new positions to.
5. Click Save when finished.



Historical Events

The Historical Events view in the Church Register section of Shepherd's Staff is a place for recording the details of an event that was historically significant to your church, such as the dedication of a new building. The historical events view shows the date, event name, location and the number of people who attended, as well as other important information.

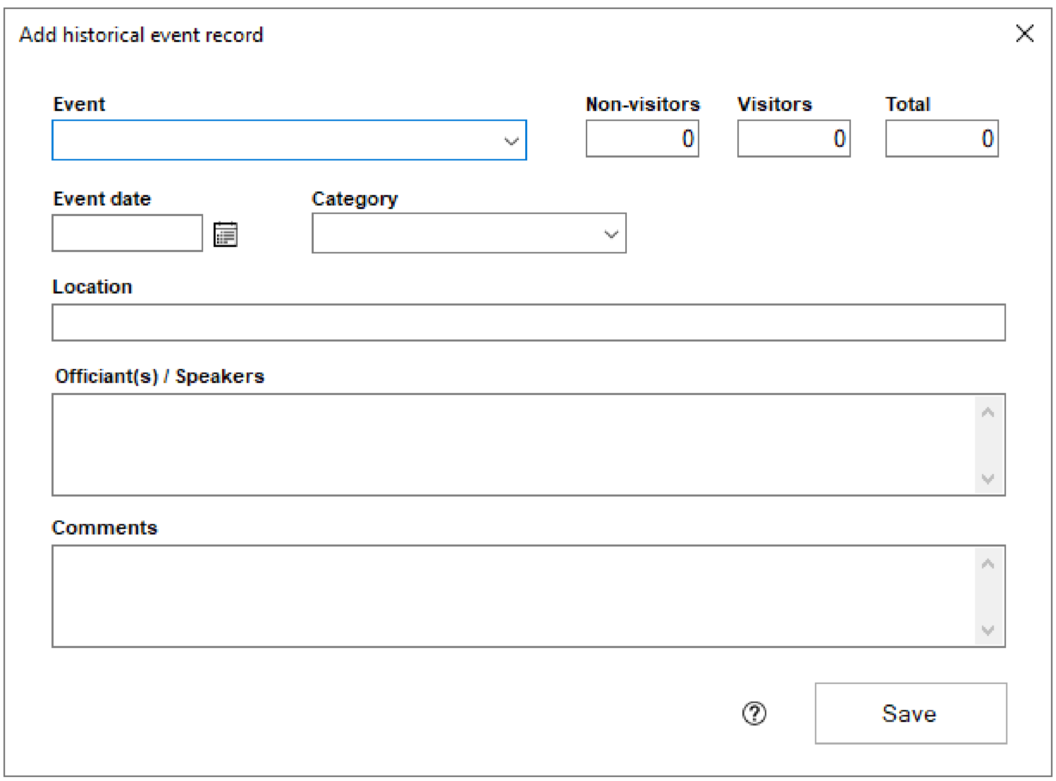
The Historical Events view can be searched by using the search bars at the top of the grid by using the standard search conventions.



Add/Edit Historical Events

Adding events to the to the Historical Events view can be accomplished by opening the Historical Events view, clicking the add button at the bottom of the grid, and filling in each piece of information that the next window requires, and you can edit any event that has been entered previously by double clicking on the event record.

1. The first step is to make sure that you have recorded the attendance of this event in the Attendance module. If attendance for this event has not been added, add and post the attendance batch in the attendance module first.
2. In the Church Register section of Membership, click on Historical Event and click "Add".
3. Select the attendance event that you are creating the historical event record for in the Event field. The number of Non-visitors, Visitors, Total, and Event Date will all be filled in for you.
4. Fill in the remaining fields with the appropriate information for the event. The Category field can have options added to it.
5. Click Save when finished.



Reports

Mailing Labels

Printing labels is one of the most frequent tasks you will undertake in Shepherd’s Staff. Knowing this, we have made an easy-to-use report for accomplishing this task. To access the mailing labels report, click the reports icon (a stack of pages with an R and a graph on it) on the Shepherd's Staff central toolbar and select "Labels". There are three different types of reports this window can generate, click on the option you want more information about below to jump to that section:

- Mailing Labels
- Mailing Label Report
- Information Labels

1. First, if the report you will be setting up is one you will need to print off frequently again in the future, you will want to set this up as a Layout. Press the "Add" button down in the bottom left corner of the window, and then fill out the name you would like to use for the layout. You can then add it to a category in the category field, and input a brief description in the description field.
2. The next step is to choose the group for which you need this report for. In the Who field you can select all records, a Subgroup of records, or even just one person or household. Apart from those options, you can run the report for a specific list or grade, as well as using the built-in Household Newsletter group.
    - Note: The Household Newsletter list is based on the Household Newsletter check box on the Household record in the Mailing Information tab.
    - Note: For the label reports (Mailing Labels and Information Labels), if you'd like a separate label for those who have a personal alternate address, check the box for "Print a separate label for those in the household with an active personal alternate address."
    - Note: These reports will not generate labels for individuals/households who have no address filled in, regardless if they are part of the group you chose in "Who".

Mailing Labels

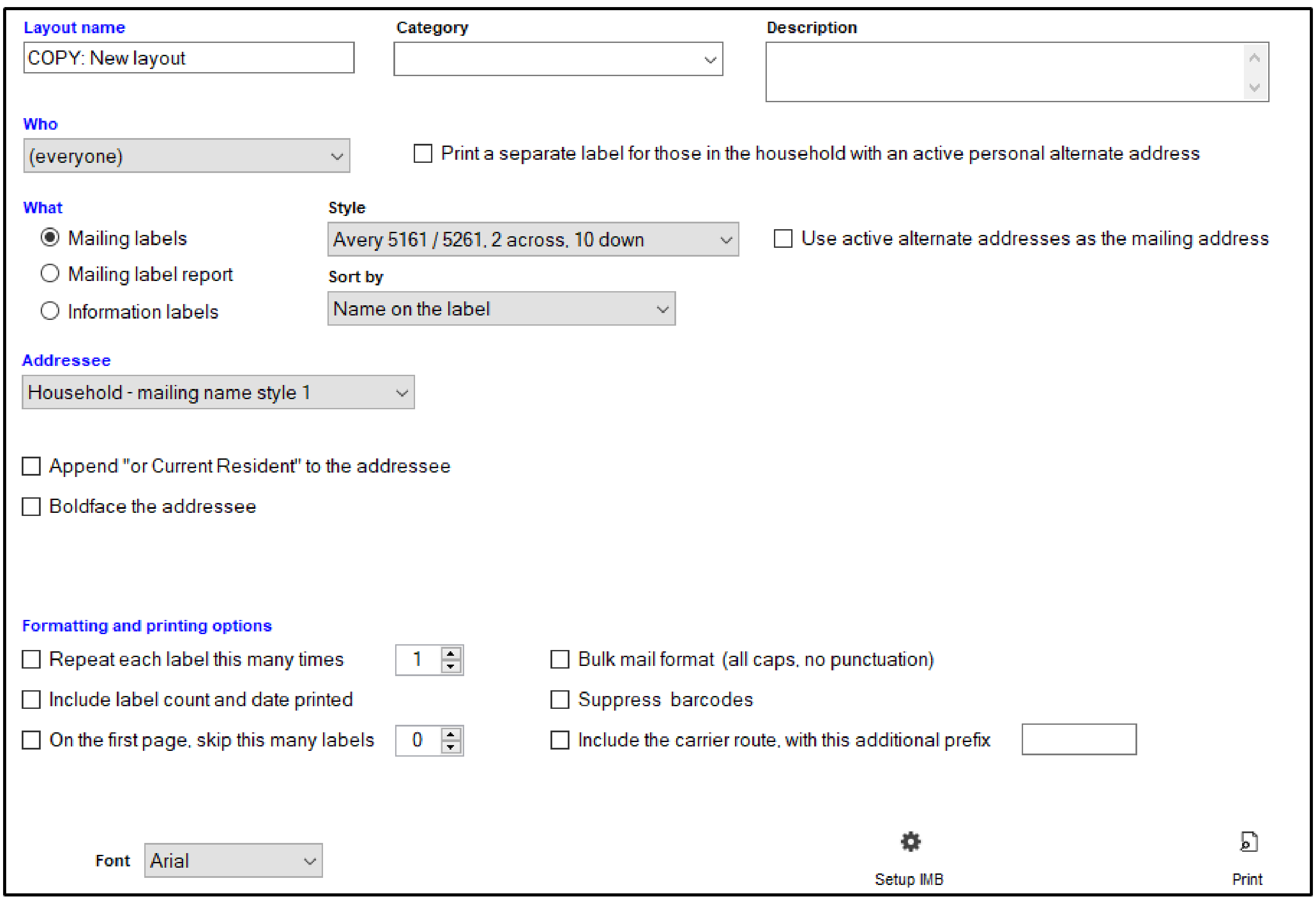
1. Select "Mailing Labels" in the "What" section, and then, select from the following options:
    - Style—This determines the size of your labels. We offer options for 6 of the most popular style of Avery mailing labels, as well as the ability to print directly onto Size #9 or Size#10 envelopes.
    - Sort By —This option determines what order your labels will print out in. You have the option of printing out sorted by name, zip code, then name, zip code+carrier route+4 digit extension, or Carrier Route, then Zip Code
    - Addressee—This determines how the labels are formatted. There are both Household and Person options. Any Household option will print out one address label per household, and any person option will print out one label per person. There are also checkboxes to append "or Current Resident" to the addressee line of your label as well as to make the Addressee line bold by checking the "Boldface the addressee" box.
2. Next, select from formatting and printing options for your labels. These options include:

- Repeat each label this many times — If checked, this checkbox will produce copies for each label for the number you selected.
- Include label count and date printed—If checked, this checkbox will create an additional label after the last label that shows how many labels you printed, and when you generated these labels
- On the first page, skip this many labels —If checked, this checkbox will leave labels blank for the number of labels you selected.
- Bulk mail format (all caps, no punctuation) —If checked, this checkbox will print your labels with all capitals letters, and will not include any punctuation.
- Suppress barcodes—If checked, this checkbox will remove the barcodes from the labels you produce.
- Include the carrier route, with this additional prefix —If checked, this will allow you to include the carrier route on the label with an additional prefix that you type in on your labels.

3. Before you print your labels, you can pick which font you'd like to use (either Arial or Courier New).

4. After choosing the settings, you want, click Print to preview your labels.

Intelligent Mail Bar Codes—If you need to use Intelligent Mail Bar Codes on your labels, click the button for Setup IMB. Your postmaster should have given you a Mailer ID number, and after you enter that in the specified field, your labels will print with Intelligent Mail Bar Codes.

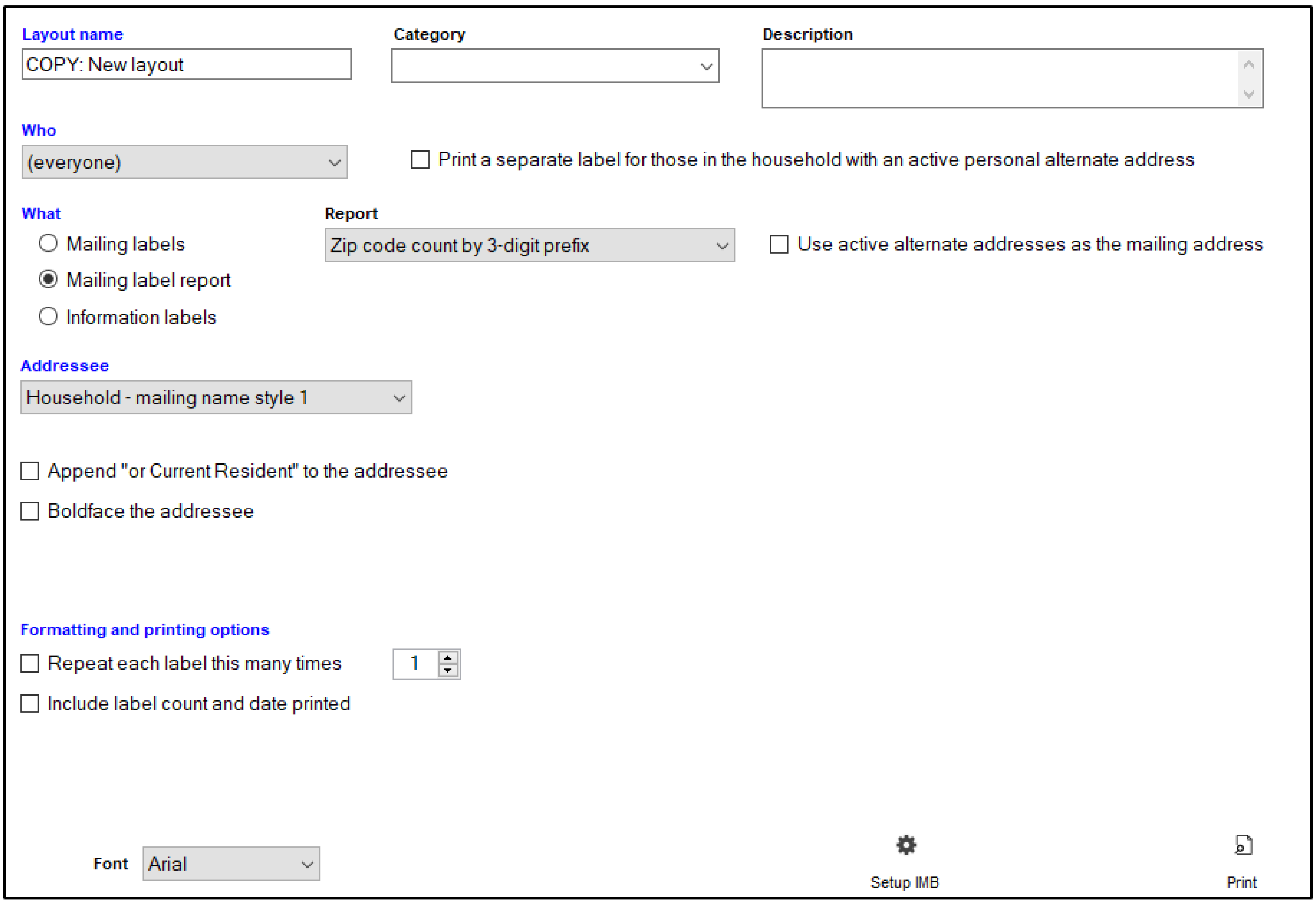


Mailing Label Report

The Mailing label report shows the number of labels that will be produced for a particular zip code or carrier route. This is useful if you're seeing to CASS certify your addresses.

1. Select "Mailing label report" in the What section, and select from the following options:
    - Report —This option determines what kind of Mailing report you're running. You can check the number of unique addresses you have at each zip code you have based on the first 3, 4, or all 5 digits, or you can check the number of unique addresses you have at each carrier route or a combination of carrier route and zip code. Check the "Use active alternate addresses as the mailing addresses" box if you want the report to calculate based on the alternate addresses that have been entered
    - Addressee —This option determines if you'll be running this report for household, or individual addresses. For this report, simply select an option that lists household first to generate your reports for household addresses, and Person to generate your reports for individual addresses.

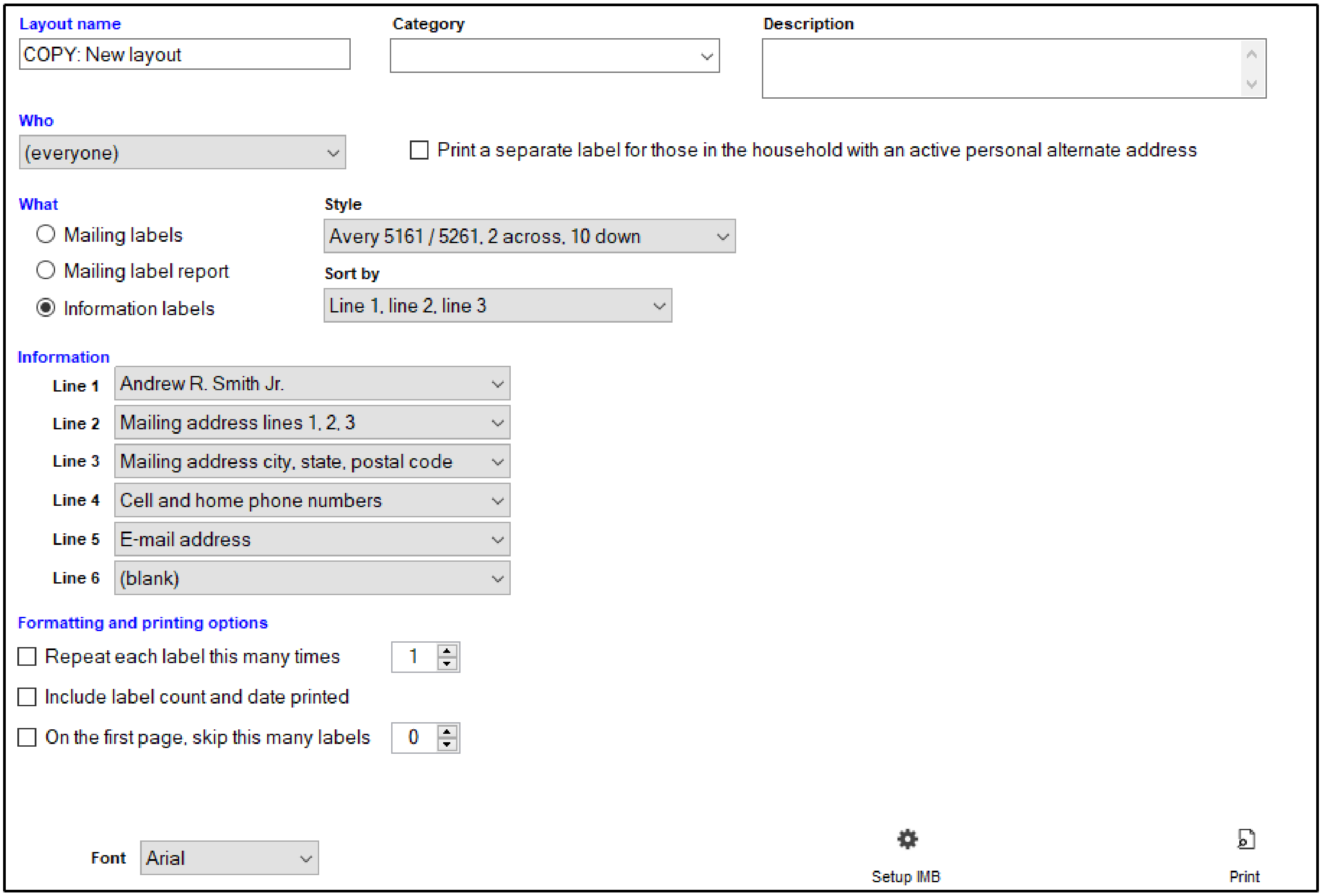
2. After choosing your options, click the Print button to preview your report.



Information Labels

The Information label option allows you to build your own custom labels based on a set of fields you can select from. This lets you build labels for uses outside of the standard mailing label, or include extra information on a mailing label that may be important for a specific mailing.

1. Select "Information labels" in the What section, and select from the following options
    - Style—This determines the size of your labels. We offer options for 6 of the most popular style of Avery mailing labels, as well as the ability to print directly onto Size #9 or Size#10 envelopes.
    - Sort By —This option determines the order in which your labels print out. There are options to sort by different configurations of the lines you select in the Information section.
    - Information —These fields allow you to select how you want your label to be laid out. The lines on your labels will be laid out from top to bottom, from Line 1 to Line 6. Each line contains the same set of options that you can place on that line. There are options for names, addresses, phone numbers, birthday, and membership information. There is also an option for (user supplied text) where, if selected will let you type in what you want to appear on that line for every label you print.
2. Next, select from formatting and printing options for your labels. These options include:
    - Repeat each label this many times — If checked, this checkbox will produce copies for each label for the number you selected.
    - Include label count and date printed—If checked, this checkbox will create an additional label after the last label that shows how many labels you printed, and when you generated these labels
    - On the first page, skip this many labels—If checked, this checkbox will leave labels blank for the number of labels you selected.
3. Before you print your labels, you can pick which font you'd like to use (either Arial or Courier New).
4. After choosing the settings, you want, click Print to preview your labels.



Intelligent Mail Bar Codes—If you need to use Intelligent Mail Bar Codes on your labels, click the button for Setup IMB. Your postmaster should have given you a Mailer ID number, and after you enter that in the specified field, your labels will print with Intelligent Mail Bar Codes.

Church Statistics

The Church Statistics Report provides you with geographic and demographic information about your congregation. When preparing your Church Statistics reports, you first must define what a member of your church is based on criteria from their person record. You also need to select when Shepherd's Staff is pulling the statistics from, and what age constitutes if someone is a child or not.

1. First, select what kind of statistical report you want to run in the "Type" field. There are reports on many different factors, including age, marital status, participation, and city, just to give a few examples. The Member definition report generates a report that shows how you define a member, based on the other fields in the Church Statistics report.
2. In the "A 'member' is someone who is marked as 'Member' and is" field, you can define what constitutes a member for the purposes of this report. The report assumes the person is marked as a member in their person record, but you may have other requirements that you consider when looking at membership, and you can select those here.
3. In the include section, you can choose if you want to include peoples names on the report or not (So you get just the numbers or the people who belong in the various groups), Removed people, and Deceased people
4. The Child age cut-off represents the age at which a person is considered an adult for reporting purposes. Any person up to and including the selected age is considered a child for reporting purposes.
5. The Membership Year and Beginning fields determine what time this report is being run for. You can use these fields to run a report for any specific point in time you want.
6. Click Print to generate your report.

Church Phone Book

The Church Phone Book Report is great for making a directory of all the contact information you have for a family. It generates a report listing all phone numbers and email addresses by household or person.

1. In the Who field, select what group of people you'll be running this report for. You can select from everyone, a select group of people, or even a subgroup or list of people.
2. In the Type field, you can select what format of Church Phone Book report you'll be running. Each of these types of report are laid out a little differently, but only the "Phone Book by Household" option groups your people into their households by default, otherwise, the reports are grouped by person
3. In the Sort/Group by field, select how you want your report grouped together.
4. In the include section, there are several options you can choose to include on your report, including address information, emergency contact information, birthdate/age information and membership info, just to give a few examples.
5. The symbols section lets you apply symbols to your Church Phone Book to denote status of the people in your congregation in relation to their membership status, membership codes, and participation for Members and Non-Members
    - To set your symbols, click the "Symbols" button. You can pick what set of symbols you want to work with, and you will see the various statuses for that set. If you want to change the symbols, check the box for "Make changes to symbols" and next to each status, fill in the character you want to place by a person if they have that status. When finished, click Close.
    - You can choose where you want to show the legend for your symbols in the "Show symbols legend on" section
6. When finished, click Print to create your Church Phone Book.

Church Directory by Household

The Church Directory by Household report allows you to create a report that shows the people within your congregation, grouped into their households. This report is useful for providing a directory to your members, your elders, or even for use within your church office. This report offers several different options, making it customizable for many different uses.

1. In the Membership Module of Shepherd's Staff, click the Reports tab and choose "Church Directory by household" in the reports menu.
2. First, select which group of households you'll be running this report for in the "Which households?" field. You can pick from households with current members, visitors, or even select households where people are part of a subgroup or list.
3. If you do not want to show certain people within a household, such as non-members who are in households on your report, check the boxes that you need in the "Within households, hide people who are" field
4. The Type field lets you select the layout for your report. There are several different options for you to select from, including some options that include household photos. The booklet options are formatted so you can fold your printout into a booklet format.
5. Some of the types will have grouping options, where you can choose to sort by household (no extra sorting), Ministry Group or Person Assigned
6. The Include section includes several options you can apply to your directory, such as including extra information on the people within the household, including alternate addresses, or showing what filters have been used.
7. The symbols section lets you apply symbols to your directory to denote status of the people in your congregation in relation to their membership status, membership codes, and participation for Members and Non-Members
    - To set your symbols, click the "Symbols" button. You can pick what set of symbols you want to work with, and you will see the various statuses for that set. If you want to change the symbols, check the box for "Make changes to symbols" and next to each status, fill in the character you want to place by a person if they have that status. When finished, click Close.
    - You can choose where you want to show the legend for your symbols in the "Show symbols legend on" section
8. When finished, click print to create your directory.

Report Writer

Report Writer lets you create customized reports that put together data that may not be put together in any other report in Shepherd's Staff.

You can print up to 10 pieces of information (fields) about people in your database. This information can be printed for all people, for a list, for a subgroup, or even for just one person.

You choose the sort order, the column headings, the report title(s), the fonts, and the layout.

1. Access the Report Writer by clicking on the Reports button (Button with an R and a graph on it) in the Shepherd's Staff Central Toolbar and select "Report Writer"
2. On the bottom left hand corner of the window, if you are creating a new report, click the "Add" to create a new, blank report.
3. In the Report name field, erase "New report" and fill in the title of the report you are creating. You may also provide it with a category and a description.
4. If you are using or updating a saved report, simply click on that report in the saved reports window.
5. In the Who section, select who you will be generating this report for.
6. If your report will involve contribution information, and you only want to include one contributor per envelope check the box for "Only show one contributor for joint envelopes". If your report will be looking at multiple funds or events, and you want to see data on each fund, or each event, check the box for "Select a different event or fund for each field".
7. In the Fields/columns box, click in the first box to select the first field that you want to add to your report.
8. In the Select a field box, first pick from the category you want to look in, and then select the field you want to use from the list. You can search for a particular field by using the search box above the field window and pressing enter.
9. Repeat steps 7&8 to select each field you want to appear in your report. Each field you select will appear as a column in your report.
10. Next, click the layout tab. In the layout section, you can choose if you want your report to be oriented in portrait, landscape or a specialized option. Specialized options include photo directory options for people or households, a sign in sheet, a checklist by day, week, or month, or mailing labels. If choosing one of the photo options, you can choose your photo size, and you're provided with a few checkboxes for options, such adding a frame around your pictures, including those who don't have a picture, and to include the photo description
11. In the sorting section, you can choose up to 3 fields to sort by. If you want to sort in descending order for that column instead of ascending order, check the "Descending" box for that field.
12. In the grouping section, you can choose options if you want to group by your first field (So, for example, if you used Person Assigned).
13. Choose any options you want in the option section, such as being able to only show your header on your first page, truncating text if it exceeds your column width, and separating rows with a line. You can also insert up to 3 custom report headings.

14. If you want to graph the fields you've selected, click the Graph tab to see your fields represented on a graph.
15. Click the Save icon if you want to use this same report again in the future.
16. You can then either print your report, export your report to excel, send it to a word doc for a mail merge, or graph it by clicking the buttons in the bottom right corner of the page.

Report Preview

Clicking the print button on most screens in Shepherd's Staff will first take you to a preview of what you're going to print out. This is the report preview screen, and this lets you get a look at your report before you commit to printing it out.

1. To browse through the pages, click the arrows in the upper left hand corner of the window. A multiple page report will start by saying it is 1/1+ pages. If you click the right arrow button with a line by it (>|) it will take you to the last page and update the page count.
2. Clicking the close button will close the preview window and take you back to where you were before you pressed the print button.
3. The button with the box with two other boxes branching off of it will open the Group Tree window. This allows you to see certain groups within your report. You can click on a group to jump to it within your report.
4. You can click the binocular button at the top of the report window to search for specific text within your report. A window will appear where you can type in the text you're searching for, and then click find next to find the next time that text occurs in your report.
5. The Magnifying glass button allows you to change the zoom on your page to make the entire report appear larger or smaller on your screen.
6. The A buttons with an arrow pointing up and down will increase or decrease the font size on the report respectively.
7. Clicking the Print button will then open Windows® printer settings window. This will allow you to choose a printer along with other options. The report will be sent to the printer when you click print in this window.
8. The export to option allows you to export the report you're previewing to different formats. There are options for Microsoft Word files, PDF's, RTFs, and HTML file. These options will all open the report directly in the associated program. The file option will allow you to save the report as a PDF to any location you choose.

Saving Reports

Saving Reports allows you to skip a lot of the setup of reports that you run on a regular basis by saving the settings you have designated on specific reports. This can be a big time saver on reports that you might run on a weekly basis, or make it easy for you to remember exactly how you have a report set up that you might run just once a year.

To save a report, after you've finished setting up the report the way you'd like it to be saved, click the "Save" button at the bottom of the report window. In the "My Reports" section, a window will appear where you can name the report. When finished, click the save icon to the right of the window where you named the report. This will then add the report to the "My Reports' section.

To access a saved report, simply double-click on it from any window. This will take you to that report, as it was saved. If you would like to rename the report, right click on the report, and click rename, and you can rename the report. If you want to delete the saved report, right click on it and click delete and this will delete the saved report. You can also change the order that the reports appear by clicking and dragging the report in the My Reports box to the spot you want that report to appear.

Report Conventions

One of the most popular features of Shepherd's Staff is the large collection of pre-made reports. There are several similar features you will find in the majority of Shepherd's Staff reports.

One such feature is the "My Reports" section. This is an area where the users can save reports that can be used again. If you like to run a report using certain settings, you can choose to save those settings as a "report" so that the next time you need it you can simply click on the saved report to fill in the settings automatically.

Keep in mind that these saved reports are optional, and at any time you can change the options and print the report. In this way you could make a template that maybe saves one or two options like subgroup or date range and then you can change some of the other options based on the month or data needed.

Another feature found in the majority of reports is the "Who" section. In the "Who" section you have the ability to tell this report what subset of records it should be run on. There are several options that will be available in most reports, including Everyone, Current Members (Listed as a member, participation is not inactive, and their removed by field is blank), Visitors (nonmember, participation is equal to "visitor"), For a Subgroup, or For a list or grade.

"Subgroup" is an option that gives a report a great deal of flexibility. You can set up a subgroup based on certain criteria and then run this report for only that subset of people. This is very handy when you need to see information on just a small collection of people in the database. Each report will come with its own selections under "Who" and can also have filters that limit information, such as "no removed people" or "members only."

Many reports also feature sections such as:

» "Include"—Gives the option to add extra fields or data to the report.

» "Sort/Group by"—Allows you to choose how you want your report organized.

Mail Merge

The Mail Merge report exports basic Household, Person, and Contributor information in a format that is readable by other software programs. This file can be saved in the computer or exported to Word or Excel for customized letters and spreadsheets. To access the Mail Merge click the reports icon (a stack of pages with an R and a graph on it) on the Shepherd's Staff central toolbar and select "Mail Merge".

When exporting out data, you need to select which fields you would like to export out. You can do this by double clicking on the field you want to export or clicking on the field you want to add and pressing the "Add" button.

Mail Merge can be used for a number of different applications; custom form letters, importing contacts to MS Outlook, creative spreadsheets, etc.

1. First, if the mail merge you will be setting up is one you will need to prepare again frequently again in the future, you will want to set this up as a Layout. Press the "Add" button down in the bottom left corner of the window, and then fill out the name you would like to use for the layout. You can then add it to a category in the category field, give it a report name and input a brief description in the description field.
2. The next step is to choose the group for which you need this mail merge for. In the Who field you can select all records, a Subgroup of records, or even just one person or household. Apart from those options, you can run the report for a specific list or grade, as well as using the built-in Household Newsletter group. There are three checkboxes that modify the output of this report.
    - Only one contributor for joint envelopes—If you export out contribution information, this will ensure that each envelope, instead of each person, gets a single row of information.
    - Select a different event or fund for each field—When printing for one event or one fund, check this box if you want to select a different event/fund for each field, which allows you to print a comparison report with a different event/fund in each column
    - One per household (head only)—When exporting out your information, this will ensure that each household, instead of each person, gets a single row of information
3. Next, select which area you want to pull fields from in the Field category box. In this box, you can select from different areas of Shepherd's Staff that have different fields. If you need to use a combination of fields from different areas, use the (all) option to have all fields from all areas available to you.
4. In the field column, scroll through the list to find the fields you would like to have included in your Mail Merge. Once you have found a field you want to add, double click it to add it to the Selected column. You can also highlight the field you'd like to add and click the "Add" button to add the field to the Selected column. If you need to remove any fields from the Selected column, double click the field, or click on it and then click the "remove button". If you want to clear the selected column, click "Remove all"
5. Once you have selected all the fields you want, check the box if you want to include field names in the first row of your export. Then, choose what you want to use for your field separator. Comma(CSV) will separate each field for each person with a comma and produce a CSV file when clicking Send to File. Tab and Pipe will use a tab and pipe respectively to separate each field for each person and will produce a TXT file when using the Send to File option.

6. Click Export pull up your data in your chosen Spreadsheet program (usually Microsoft Excel). If you click the Mail Merge option, this will take you directly to Microsoft Word to a Word Macro document. Print will provide you with a printable version of the fields you selected.

Creating a Form Letter with Mail Merge

This next section will describe creating a form letter using Mail Merge, using Microsoft Word in Office 365, however, these instructions will be similar for earlier versions of Word as well.

1. Following the steps in the previous section, choose CSV for your field separator and click "Send to File". Save your CSV file with a name you will easily recognize in a location you can easily find (your desktop is a good option.)
2. Open the letter you want to insert fields into in Microsoft Word.
3. Click on the Mailings tab, click the down arrow on "Select Recipients" and choose "Use an Existing List"
4. Select your Mail Merge file you exported, and click Open. Click OK at the next window.
5. Click at the point you want to insert one of your fields from your Mail Merge, and then, in the toolbar, click the drop down arrow for "Insert Merge Field" and select which field you want in the spot you have selected. Repeat this process til you have placed all the fields that you want within your letter.
6. When you're finished, you can click the Preview Results button on the toolbar to preview what your letter will look like with actual data. When you're ready to print, click Finish and Merge and choose Print documents to print out your letters.

Data Entry Settings

In Shepherd's Staff, different churches have different information that is considered to be required for membership at the church. Shepherd's Staff offers the ability to make those fields be required for data entry when you're entering information for a Member.

Note: The settings in this feature cannot be edited if you're using the Lutheran or United Methodist editions of Shepherd's Staff, as these versions require that Membership codes, Received by and Date received information is entered for accurate reporting purposes.

1. Log in to Shepherd's Staff that has full supervisor level control to all modules. The SYSADMIN account is common to every Shepherd's Staff account and has full supervisor access to all modules.
2. In the Membership module, click on "Tools/settings"
3. Check the box for "Data entry"
4. Check or Uncheck the boxes for "Require Membership Code" and "Require Received By and Date Received" if you want to make these fields required when entering members or not.

Change Field Names

Many Fields in Shepherd's Staff can have their names changed to better suit your church. For example, if your church isn't interested in tracking when someone took their first communion, but you have another key event that you want to record for your members, you could change the name of the "First Communion" field to something else.

1. Log in to Shepherd's Staff that has full supervisor level control to all modules. The SYSADMIN account is common to every Shepherd's Staff account and has full supervisor access to all modules.
2. In the Membership module, click on "Tools/settings"
3. Check the box for Customize field names
4. In the field box, select the field that you want to change the name of.
5. In the Change to box, type in what you want to change the field name to. The original field name will appear in blue text to the right of this box.
6. Click Save to make the change.

Person/Household Record Defaults

To save time when you're entering new people and households in Shepherd's Staff, you might choose to have some fields filled out automatically with information that is common enough to your church that you would fill it in for the majority of new people or households you enter. In the Tools/Settings section of Shepherd's Staff, you can set several default options for some fields to help you save time when entering these new records.

1. Log in to Shepherd's Staff that has full supervisor level control to all modules. The SYSADMIN account is common to every Shepherd's Staff account and has full supervisor access to all modules.
2. In the Membership Module, click on "Tools/Settings" and check the box for "Defaults when adding new people
3. The City/State/Postal code/Country/County fields allow you to fill in text that will be used whenever you're adding a new household. This will make it so whatever you type into these fields will be pre-entered whenever you create a new household records
4. The Newsletter field makes it so the newsletter mailing option is set to what you choose here by default when you create a new household
5. Include in Church360° Unite checkbox will determine if people, when added, are selected to be synced to Church360° Unite.
6. Grade cutoff determines what School Grade a child will be placed into by default when you add in their birthday information, when adding a person record. So, for example, if you have a 5 year old child, and your school cut off date is September 1st, if the child's birthday falls on or before September 1st, the child would be placed in Kindergarten. If the child's birthday falls after September 1st, then the child would be placed in Preschool 4.
7. The Show box will add additional fields that appear when you add a new person record. If any of these pieces of information are considered critical to your church, and you want to make sure these get added when you add a new person, check the box next to that field so you can have that field appear when entering a new record.

Promote Students

At the end of the school year, you normally promote students to the next grade level in school and Sunday School. Instead of doing this person by person, you can mass promote students using the Promote Students utility. The Promote Students utility only works with the default grades that ship with Membership (those prefixed with D01, K01, S01, etc., unless you are United Methodist, in which case they are named as prescribed by your denomination). When someone in 12th grade gets promoted, the Current Grade field on the graduate's School tab is blanked out.

Since this utility should only be used once a year, it is protected by User Security. That way you can make it so that only certain people have the ability to run it.

» Clear the Sunday School Section when Promoting—When you assign your Sunday School grades, there is an option to assign a section for each grade; this is to accommodate large grades which may be split into multiple classes. For example, a church may have 42 pupils in its Kindergarten grade and decide to split the grade into two classes so there are only 21 pupils in each class. When prompting students, if a church wishes to clear those section assignments, they can mark this check box before clicking the Promote button to do so. If the church wishes to keep those section assignments, or if the church does not have any Sunday School grades that are divided into multiple sections, there is no need to mark the Clear the Sunday School Section when promoting their students.

To promote students follow these steps:

1. Make a backup. The changes made by this utility are difficult to reverse.
2. After making a backup, in the Membership module, click on Tools/Settings, and in the Tools section, choose "Promote students to the next grade" and click "Start"
3. Select if you want to clear the Sunday School Section when you promote your students by checking the box for "Clear the Sunday School Section" when promoting.
4. Click Promote. You will be asked to confirm you want to promote your students. Click Yes to confirm, and then you will be shown a window that lets you know how many students were promoted.