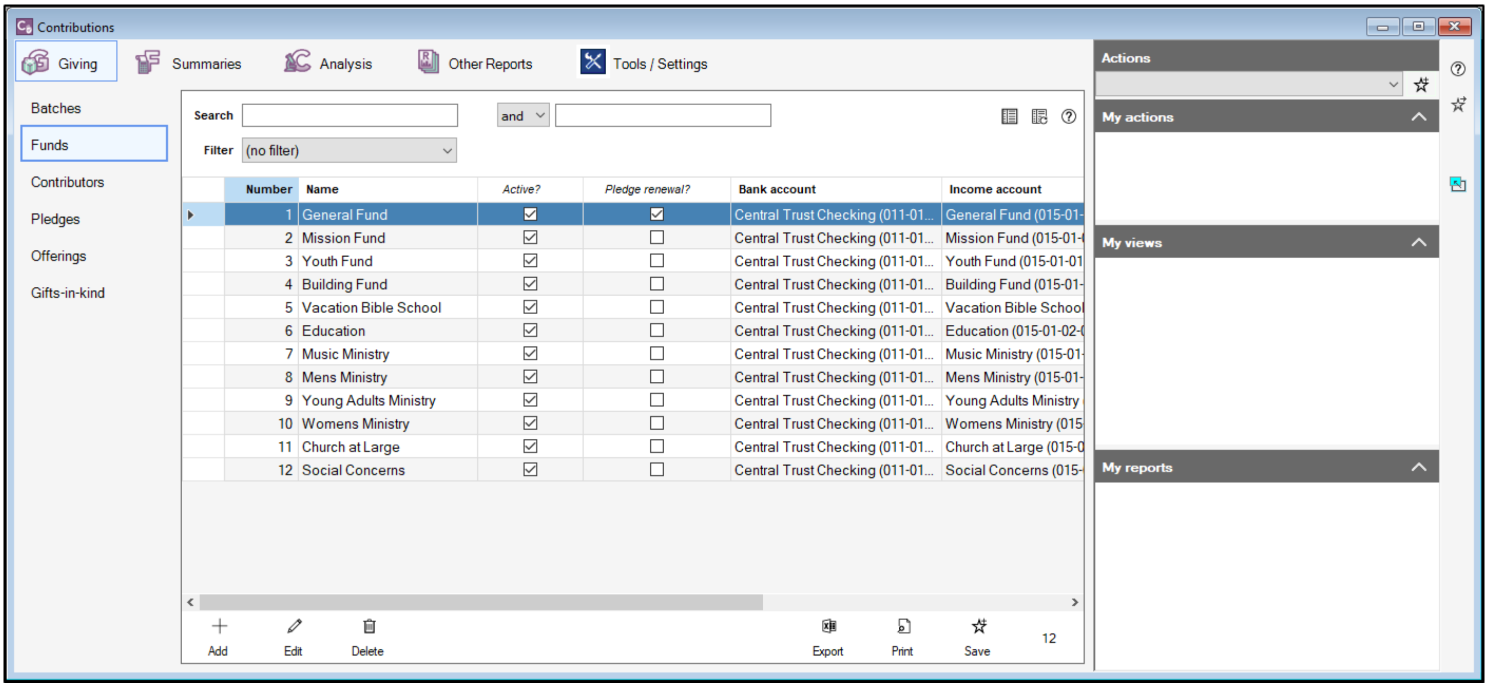
shepherd's staff®

CONTRIBUTIONS

TRAINING MANUAL

Introduction to Contributions Module

The Contributions module allows you to record giving information for your congregation, including envelopes, offerings, and gifts-in-kind. Common tasks include creating offering batches, running contribution analysis reports, and preparing contribution statements.



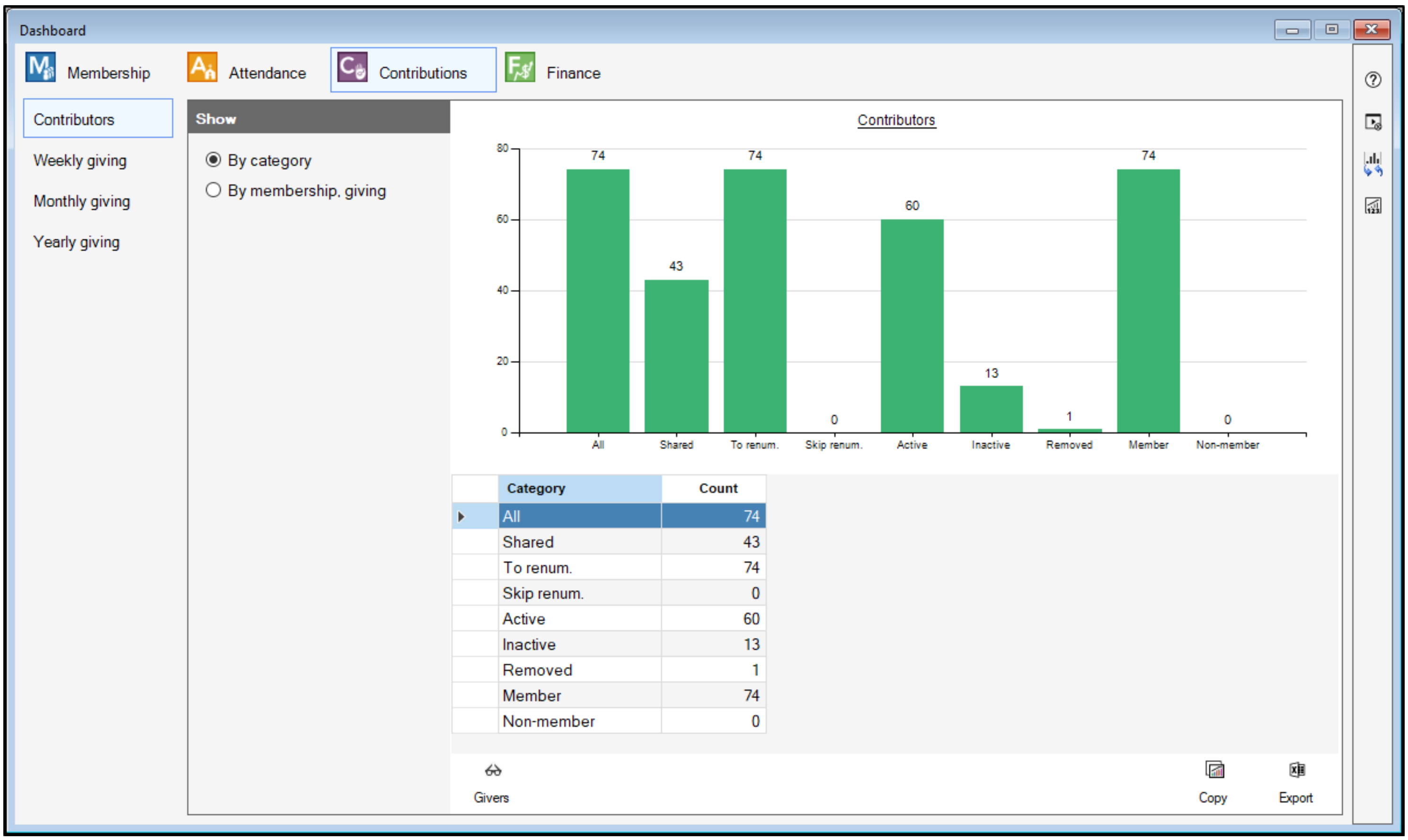
› Introduction to Contributions

Contributions Dashboard

The Contributions Dashboard provides a quick snapshot of your Contributions data. This includes information about the number of contributors you have in different categories, and information on Weekly, Monthly and Yearly giving.

The Church Dashboard for Contributions contains tabs for four different views. Contributors, Weekly giving, Monthly giving, and Yearly giving

Contributors

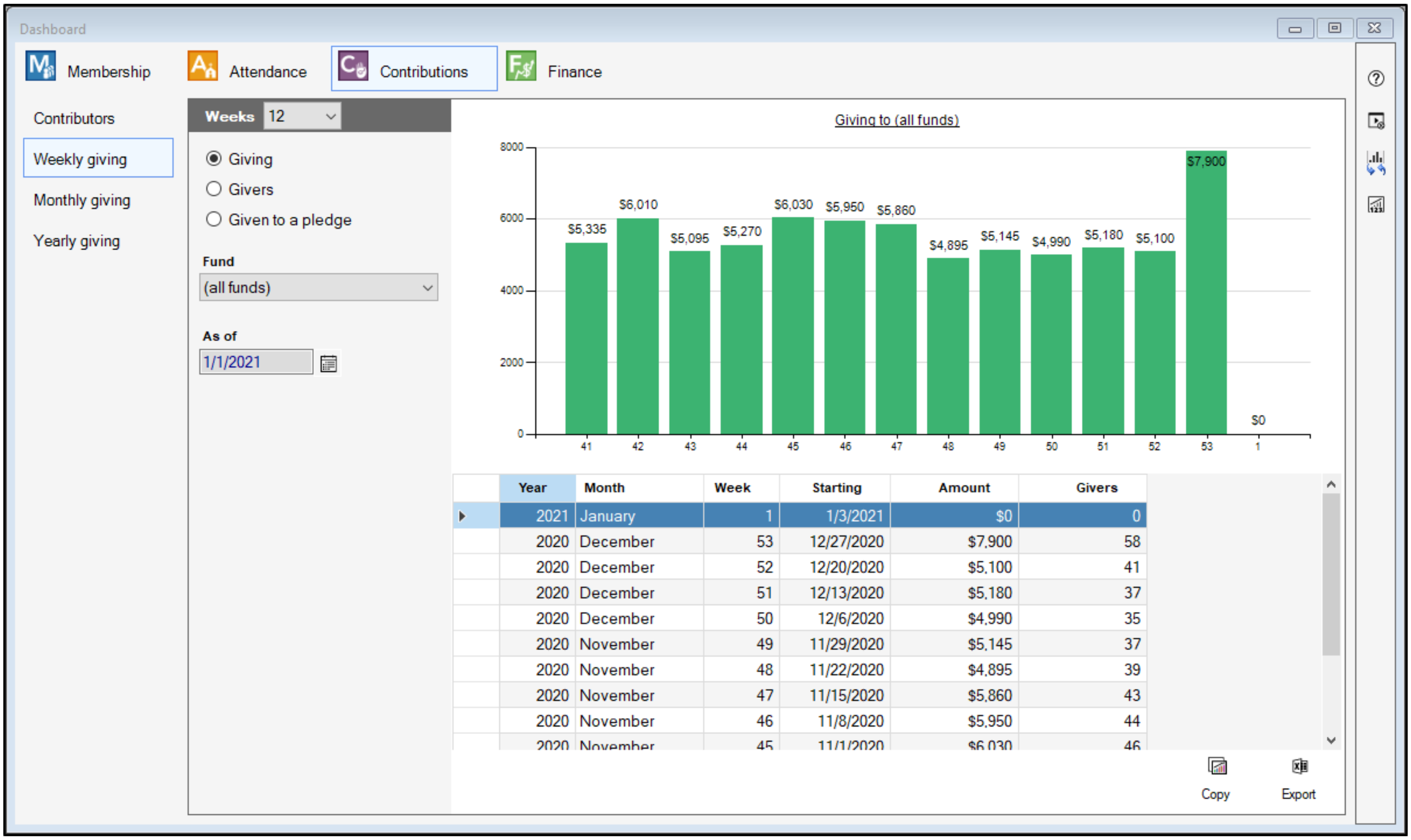


The Contributors view of the Dashboard will provide you with counts of your Contributors in different categories and giving totals for different categories of members. This is broken up into two different options:

- By category - This view will show you the counts of your givers in different categories, such as Shared envelopes, To be renumbered, to be skipped, Active, Inactive, as well as a few others. To see who is in a particular category, click on the category you want to look into, and click the "Givers" button at the bottom left of the window.

- By Membership, giving - This view will show you your giving for each year, split up into 4 columns. Total, Member, Non-member, Loose/plate.

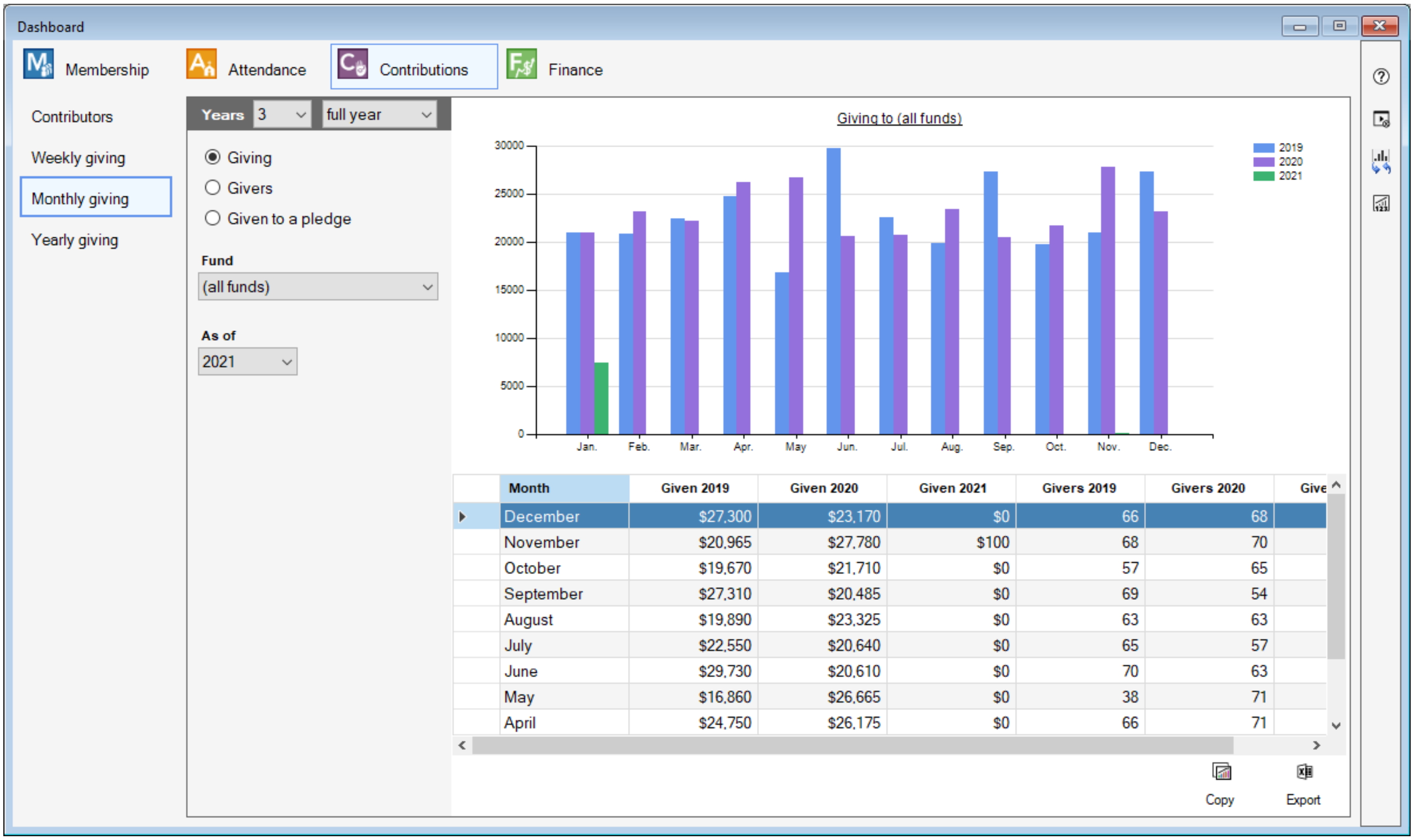
Weekly giving



The Weekly giving view of the dashboard will show you either giving totals, number of givers, or amount of pledged giving over a number of weeks to all or one particular fund starting from the date of your choice. You can view 12, 18, 24, or 30 weeks of giving at once.

- Giving - This view will show you a graph with weekly giving totals for each week in the time period you set. The chart below the graph at the top of the page will show you the Year, Month, Week, what date that week started, the giving total, and the number of givers for that week.
- Givers - This view will show you a graph with the number of givers for each week in the time period you set. The chart below the graph at the top of the page will show you the Year, Month, Week, what date that week started, the giving total, and the number of givers for that week.
- Given to a pledge - This view will show you a graph with weekly giving totals that have been given towards a pledge. The chart below the graph at the top of the page will show you the Year, Month, Week, what date that week started, the giving total, and the number of givers for that week.

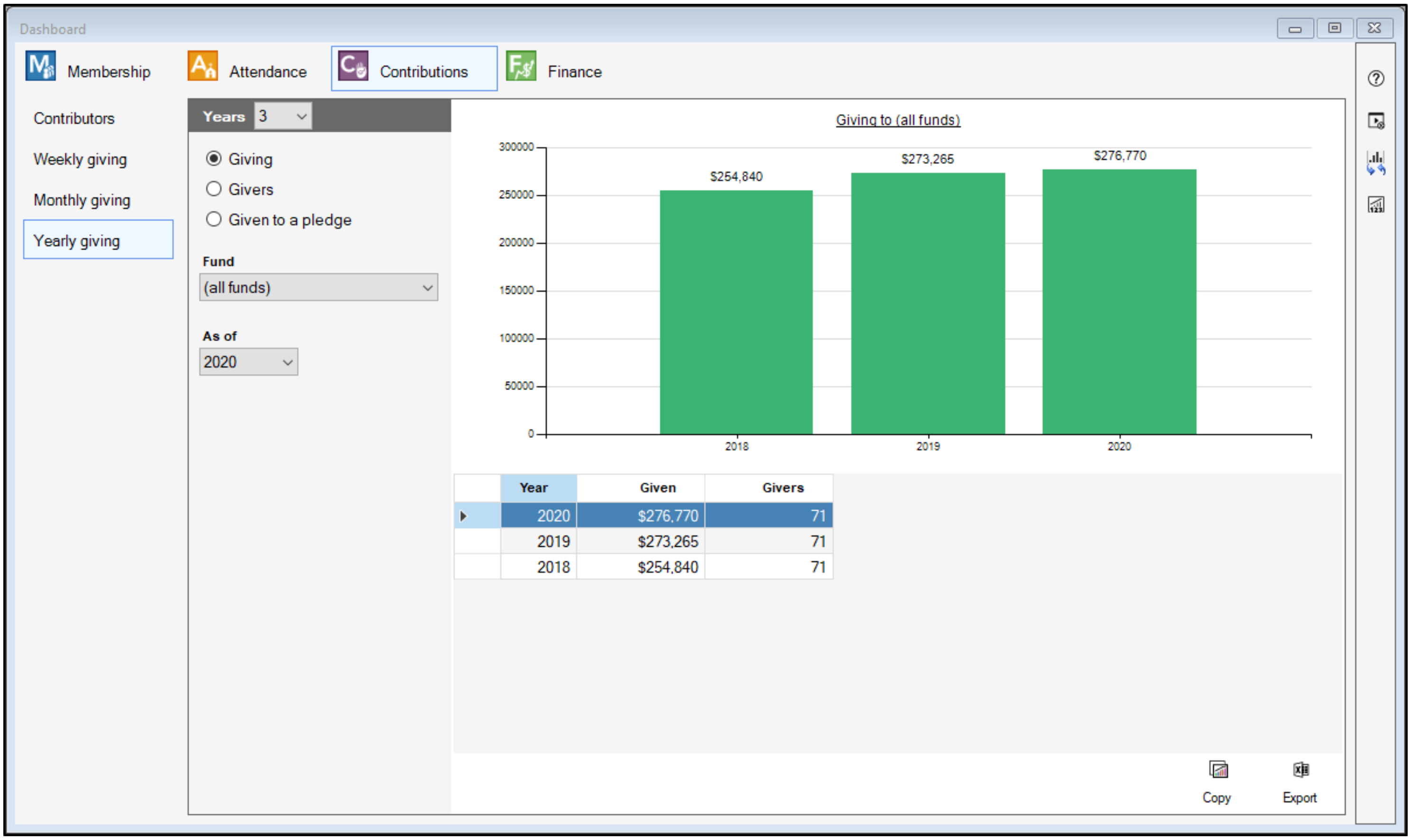
Monthly giving



The Monthly giving view of the dashboard will show you either giving totals, number of givers, or amount of pledged giving over multiple years, broken out by month. You can look at full years, or particular segments of years, such as each quarter or half years. You can look at all funds, or one particular fund, and you can also set which year you're looking back from.

- Giving - This view will show you a graph with monthly giving totals for each year in the time period you set. The chart below the graph at the top of the page will show you the giving totals for each year in the time period, and the number of givers for each year in the time period.
- Givers - This view will show you a graph with monthly totals for the number of givers you had for each year in the time period you set. The chart below the graph at the top of the page will show you the giving totals for each year in the time period, and the number of givers for each year in the time period.
- Given to a pledge - This view will show you a graph with monthly pledged giving totals for each year in the time period you set. The chart below the graph at the top of the page will show you the pledged giving totals for each year in the time period, and the number of pledged givers for each year in the time period.

Yearly Giving



The Yearly giving view of the dashboard will show you either giving totals, number of givers, or amount of pledged giving over multiple years, with yearly totals. You can look at these totals for all funds or just a single fund, and you can also set which year you're looking back from.

- Giving - This view will show you a graph with yearly giving totals for each year in the time period you set. The chart below the graph at the top of the page will show you the giving totals for each year in the time period, and the number of givers for each year in the time period.
- Givers - This view will show you a graph with yearly totals for the number of givers you had for each year in the time period you set. The chart below the graph at the top of the page will show you the giving totals for each year in the time period, and the number of givers for each year in the time period.
- Given to a pledge - This view will show you a graph with yearly pledged giving totals for each year in the time period you set. The chart below the graph at the top of the page will show you the pledged giving totals for each year in the time period, and the number of pledged givers for each year in the time period.

Batches

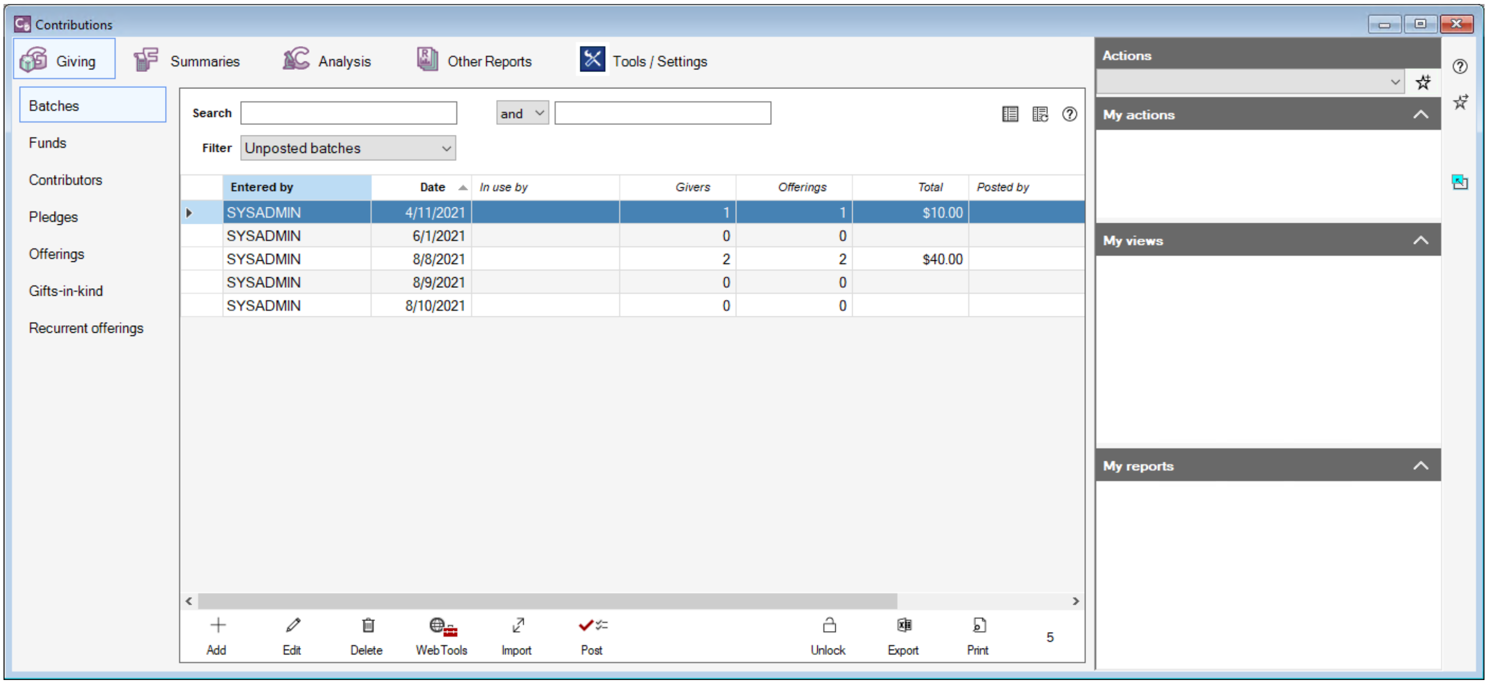
The Batch utility in the Contributions module of Shepherd's Staff allows you to enter multiple offerings quickly, compartmentalize workflow, and even work from home.

Offering Batches let you type offerings in a grid format and by doing so you can move quickly between cells and rows by using either the “Enter” or “TAB” keys on your keyboard.

If you wish to compartmentalize the entry process, it’s possible to do so through the Batch utility and user security. For example, you can have one person enter the offerings just based off the envelope number without access to names or the ability to post. Then a second person can post that Batch after verifying its accuracy. In this way your contributors maintain their anonymity and the church gets a set of checks and balances for security.

After a Batch is entered, you also have the ability to save it and come back to it, or you can even export it to a flash drive to take home with you. Then you can work on it at home and import it back into the church database the next day. You can also use the Webtools feature to work on offering batches online, and later download these batches into Shepherd's Staff.

1. To access the batches window, click on the "Giving" tab, and then click on "Batches". Any batches that have yet to be posted will be shown on the offering screen. You can switch between posted and unposted batches in the "Filter" box.
2. To add an offering batch, click the "Add" button at the bottom of the window, and in the window that appears, set the date of the offering batch and click "Continue" to start working with your offering batch.
3. To edit an offering batch, click on the offering batch you want to make changes to and click "Edit." (Only unposted batches can be edited)
4. To delete an offering batch click on the offering batch you want to delete and click "Delete" (Only unposted batches can be deleted)



Please note: Only batches posted after upgrading to 8.9 will show under the Posted batches filter in the Batches grid. To view offerings from before the upgrade you can filter for the date in question in the Offerings grid.

Batch Entry

Every church collects offerings differently and therefore the batch entry screen has many optional ways of entering offerings. There are a variety of options available when entering your offering batches that can streamline and make your offering entry process quick and easy to use.

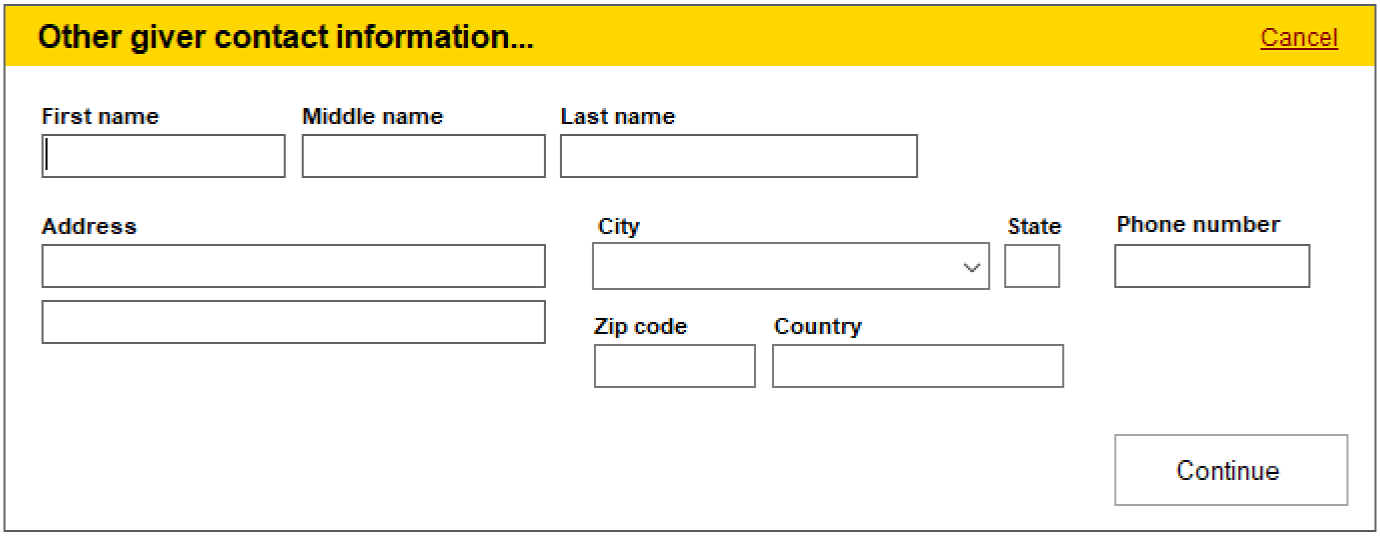
When you add a batch, you'll first select what date your offering batch is for, and then click the "Continue" button to go into the offering batch. On the batch entry window, if you realized you selected the wrong date, click on the pencil icon to the left of where the date is listed, and you can change what date the offering batch is for.

The next option is your entry method. You can switch between methods by clicking the icon to the left of the contributor drop list. There are two options:

- Free Input Method - This method allows you to choose a contributor, fund, and amount they gave. The amount you enter will be for just the one fund you selected. If a contributor gives to multiple funds, you'll add another line for that same contributor but to a different fund.
- Totals Method - This method will let you select a contributor and the first fund the contributor gave to, but then, will ask you the total amount that contributor gave within this batch. You'll then choose how much the contributor gave to the selected fund. If there are funds remaining, you'll then need to enter in another line for the next fund that the contributor gave to, and the amount that they gave to that fund. You'll repeat this process until the total amount the contributor has given has been distributed to each of the funds that the contributor has given to.

Next, you'll select which contributor you want to enter an offering for. When you click the drop list, you'll see all your contributors listed alphabetically. Above your contributors, you'll see two other options, (other giver) and (anonymous).

The (other giver) option will bring up an "Other giver contact information.." window. This is where you can enter in the information of who this other giver is. This is a way you can enter offerings for a one-time giver and be able to provide them with a contribution statement later. If you enter the same person on a later batch (this will need to have the exact same spelling and capitalization) this will also be added to their statement.



The (anonymous) option is used for givers who you don't have any information on, or for loose offerings. This will not produce a contribution statement.

If you want to add a new contributor while still in your offering batch, click the green + button, and you'll be taken to the Add Contributor window where you can add a contributor to the list of contributors. When you click Save, you'll be brought back to the batch entry window.

If you check the "Enter by envelope number" box, when you click inside the contributor box, you'll be able to start typing in an envelope number to pull up a person, instead of typing in a name.

Next, you'll be able to select which fund the offering was given to. If you want to enter your offerings by fund number instead of by fund name, check the "Enter by fund name" box. After you select your fund, if you uncheck the box to the left of the "Enter by fund name" box, it will lock in that fund so that same fund gets used again for the next offering you enter. To the left of that box, you'll see an option to set an option for "Advance Fund on Copy" or "Mirror Fund on Copy". This works with the copy function at the bottom of the page.

The copy function will make a copy of the offering you select. If you use the Advance Fund on Copy option, this will create the copy, but increase the fund number by one to go to the next fund. The Mirror Fund on Copy option will create an exact copy of the offering you selected.

Note: The Add Contributor button allows new contributors to be added during the Batch entry process.

1. Make sure that the Date is correct.
2. Check the boxes you want to use. In this case we are checking “Hide Special Description” and “Hide Check number.”

3. The Envelope Number can either be typed in or selected from the drop list. Press ENTER or TAB on your keyboard.
4. Type in the fund or select it from the drop list. Press ENTER or TAB on your keyboard.
5. Type in the amount of the offering. You do not need to enter the $ sign. If it's a whole dollar amount for the offering like 20, you don't need to enter a decimal. Press ENTER or TAB on your keyboard to move to the next row.
6. Once you are done entering in the Batch, you may want to click the "Batch Totals" button to see a summary of your current Batch.
7. Now that the Batch is complete, click Close to end the Batch entry.
8. Our next step is to post the Batch.

After closing the Batch entry screen, you will be returned to the Offering Batches window. You will see your Batch (or Batches) in this window. At this point the Batch is still temporary and can be edited by highlighting the Batch and clicking the Edit button which will re-open the Batch entry window.

However, since this Batch is still temporary it won't show on any other grids or reports. In order to make that happen, we must post this Batch. The posting process takes the lines within the Batches and creates an "Offering Record" for each line.

The posting process is also what allows the Contributions module to communicate with Attendance and Finance. You will have the options to:

» Create an Attendance Batch—This allows you to select an event in attendance to create a Batch for. Everyone that gave an offering will be placed in a Batch in the Attendance module which can then be edited to add the rest of the people who came. Click the question mark button for instructions on enabling this feature.

» Create a Deposit in Finance—This option will create a deposit in Finance based on the funds in the Batch and what finance accounts those fund records are attached to.

1. Make any necessary edits to the Batch. Verify that the date is correct.
2. Reports can be printed to review the Batch before posting by highlighting the Batch and clicking Print. (The detail and summary reports will print during the posting process as well).
3. Once the Batch is complete and verified, highlight it and click the "Post" button.
4. At this point you get the options to create an Attendance Batch or a Deposit in Finance. Check or uncheck these boxes based on your needs. If you are making a deposit, make sure that the Deposit Date

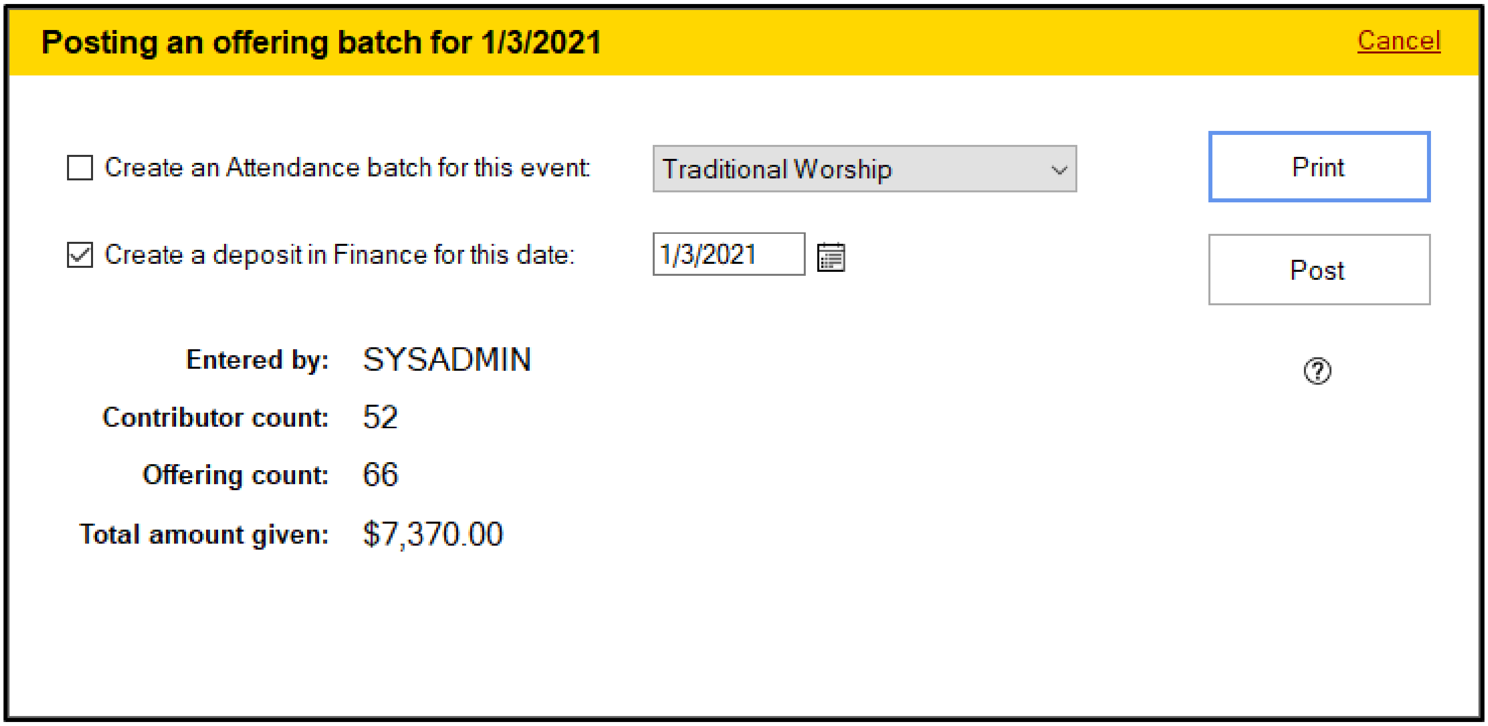
is the actual drop date at the bank.

5. Click OK to start the post.
6. Answer any verification questions that come up to continue.
7. You will receive a message saying the post was successful.
8. After Posting, the Batch disappears and the lines become permanent Offering records.

Batch Posting

After an offering batch has been created, either by creating the batch manually, bringing the batch in from WebTools, or importing from an external source, to get the offerings inside the batch to become offering records, the offering batch must be posted. Any offerings inside a batch are not counted towards any reports, and they will not appear on contribution statements.

1. In the Contributions Module go to Giving>Batches.
2. Click on the offering batch that you'd like to post. This will highlight the batch in blue.
3. Click the "Post" button at the bottom of the grid.
4. In the window that appears, check the "Create an Attendance batch for this event:" checkbox if you would like the posting of this offering batch to create a batch in the Attendance module for the event you select in the drop down box, on the date of the batch, with the people who you posted offerings for.
5. Check the "Create a deposit in Finance for this date:" checkbox if you want the posting of this batch to create a deposit in the finance module for the date you choose in the date box to the right of the checkbox. The total that is being posted in each fund will be posted to a deposit in the corresponding accounts, according to what has been selected in the contribution funds.
6. You can verify the Contributor Count, Offering count and the total amount given in the bottom part of this window.
7. If you'd like to print out a batch report, click the "Print" button before posting. This will prepare a batch detail report that shows each offering for each giver.
8. Click the "Post" button to confirm the posting of your batch.

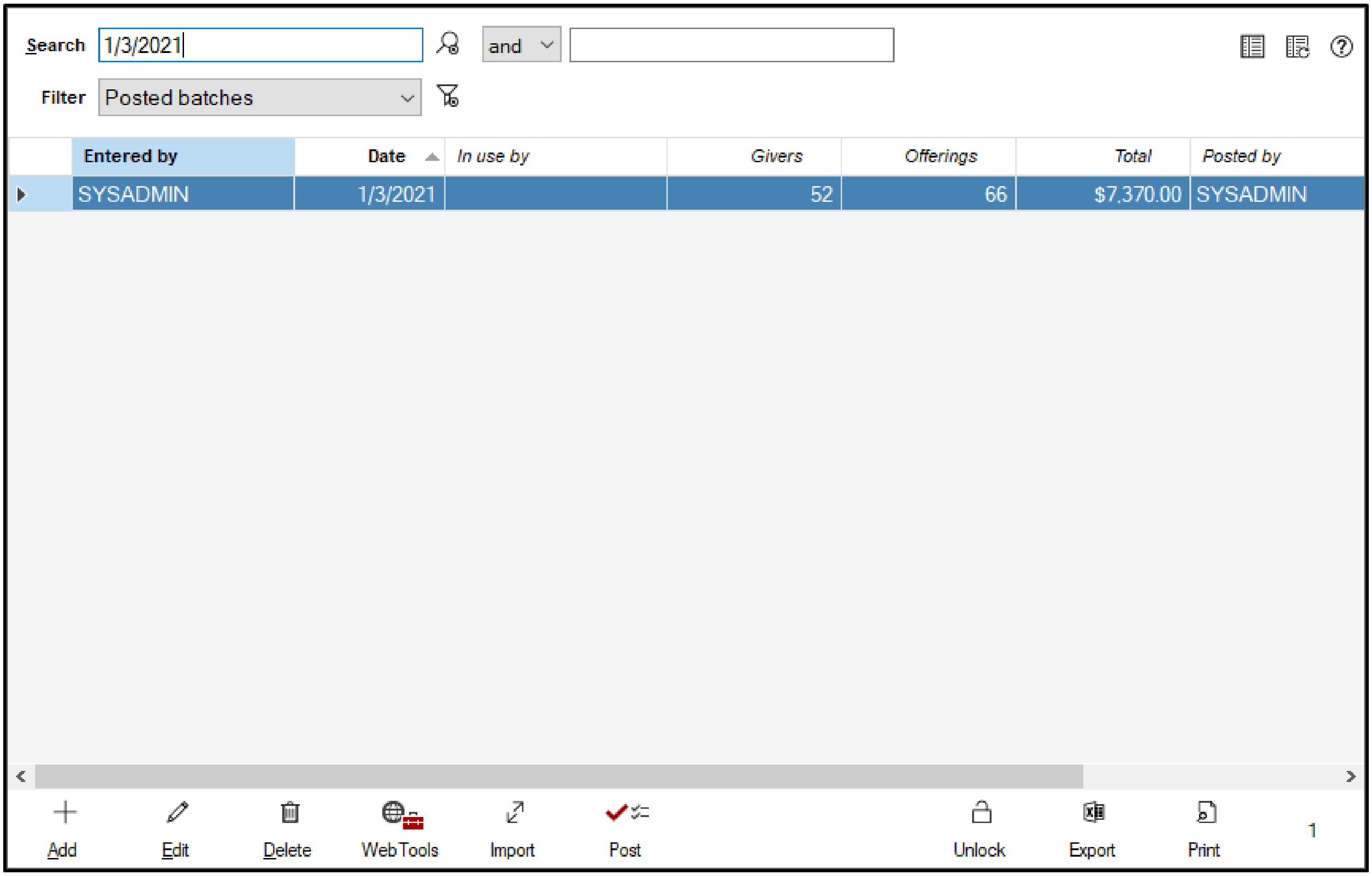

Posting an offering batch for 1/3/2021
Cancel
Create an Attendance batch for this event:
Traditional Worship
Print
Create a deposit in Finance for this date:
1/3/2021
Post
Entered by: SYSADMIN
Contributor count: 52
Offering count: 66
Total amount given: $7,370.00

Recreating a Batch Report

If you need to print a Batch report from a posted Batch, you can do that directly in the batches window. The batches window has a filter to show you only your posted batches, so you can use this to prepare a batch report you may have missed printing out.

Note: Only batches posted in version 8.9 of Shepherd's Staff and onward will be included in the Posted Batches window.

1. To recreate a Batch report, open the Contributions module and click on "Batches"
2. In the "Filter" box, select "Posted Batches"
3. If you're searching for a particular batch, type in the date of the batch in MM/DD/YYYY format in the first Search box and press enter on your keyboard.
4. Click on the batch that you want to recreate a report for so it's highlighted, and then click "Print" in the bottom right-hand corner of the window.
5. There are multiple options, which include:
    - Batch report (with names) - This report will show each envelope, along with the name(s) of the contributor(s), the amount they gave to each fund, and any descriptions or check numbers for those contributions
    - Batch report (no names) - This is the same as the previous report, but it does not include contributor names, just envelope numbers.
    - Checklist by giver - This report will show each envelope, along with the name(s) of the contributor(s), the amount they gave to each fund, and any descriptions or check numbers for those contributions. There will be a checkbox for each offering that you can use to check against your offering counters. This report is sorted by contributor name.
    - Checklist by order - This is the same as the previous report, except is sorted by the order the offerings were entered into the batch instead of contributor name.


Search 1/3/2021
and
Filter Posted batches
Entered by
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In use by
Givers
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1/3/2021
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1

Import/Export Shepherd's Staff Batches

The Import/Export Shepherd's Staff batch utility allows you to create an offering batch on one computer that has Shepherd's Staff, export that batch to a file, and then take that file to another computer that has Shepherd's Staff, import the batch, and then post the offering batch.

This could be used for a person who works on the Shepherd's Staff database offsite, where they would save the offering batches that they prepare at home, for example, to a flash drive and import them into Shepherd's Staff at the church on Sunday morning when they come to church.

The Import/Export Shepherd's Staff batch utility only works with unposted batches. Once a batch has been posted, it can no longer be exported to a file to be imported on another computer. It's also important that the databases that you're exporting the batches from are current with the database you're importing to, so it's recommended that before the person working off-site starts preparing their offering batches that a backup from the main database is restored on their off-site computer.

Exporting Batches:

1. After you have created your offering batch(es), click the "Import" option at the bottom of the "Batches" grid and choose "Shepherd's Staff batch" and click "Select"
2. In the window that appears, all unposted offering batches will appear. Make sure only the offering batches you want to export to your export file are checked.
3. Click the "Export" button.
4. A file explorer window will appear where you can choose the location and name of your export file. Save your export file to a location you can easily find.

Importing Batches:

1. Once you have received the import file on the computer that you want to import to, open the contributions module and go to Giving>Batches
2. Click the "Import" option at the bottom of the offering batch window and choose "Shepherd's Staff batch and click "Select"
3. Click the "Select file to Import" button

4. At the file explorer window that appears, find the batch file you received from the person who created the offering batches off-site, and double click it.
5. Each offering batch in the batch file will then appear in the "Import and Export Contribution Batches" window.
6. Click "Import" to bring these offering batches into your unposted batches. Click "Reset list for exporting" if you want to cancel out of the import, but stay in the "Import and Export Contribution Batches" window.

Import from other giving source

The Import from other giving source utility allows you to import offerings from a CSV or TXT file. This is useful if you use an e-giving platform other than Vanco, as this will give you an option to import your offerings from these services. The import files will need to be set up in either a CSV or TXT format, which can be done in Excel. While column headers are not required, you should enter your information in the following order (And you can use the following as column headers if you wish)

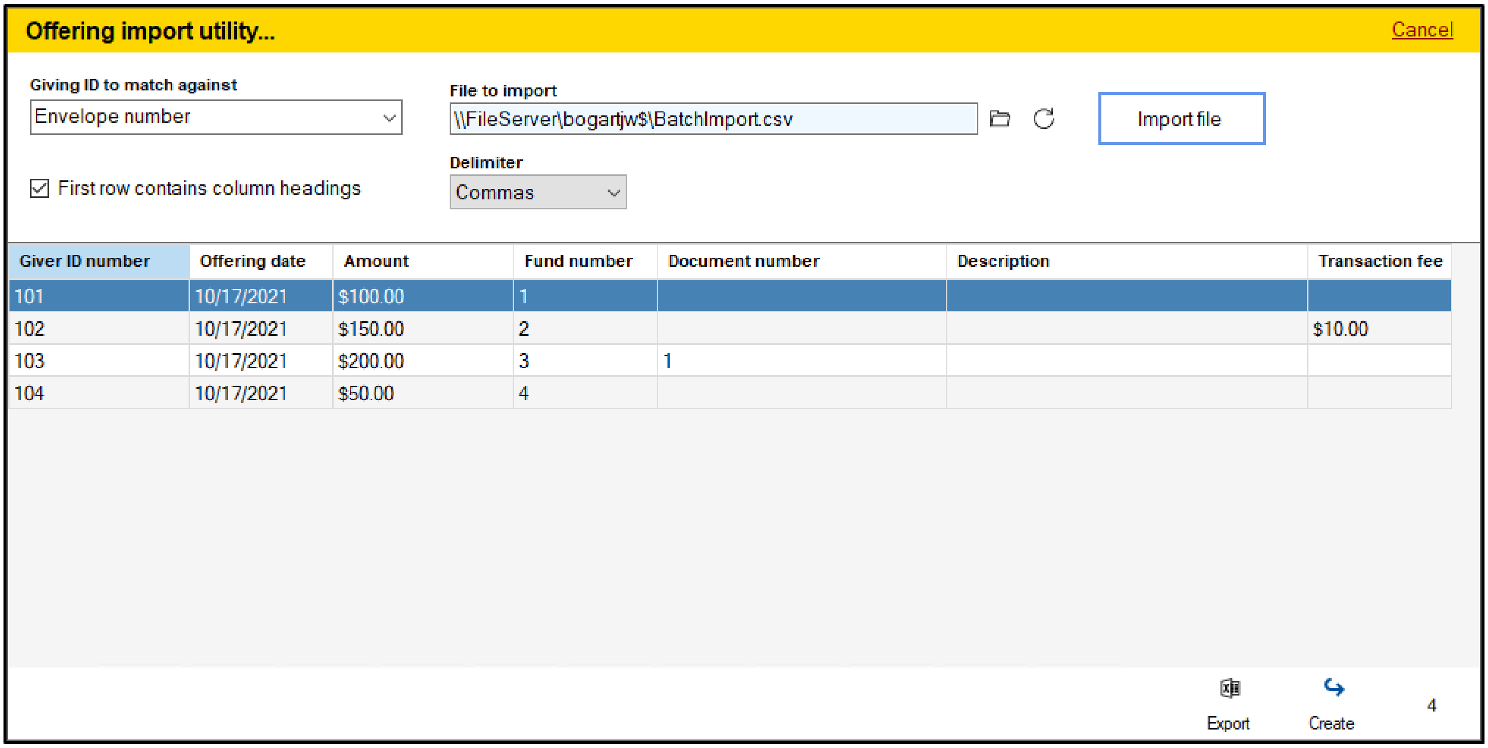
- GiverID - This is the giver's unique identifying number in the system you're importing from. This can match their envelope number in Shepherd's Staff, or any of the Giving ID's you've set within that contributor's record.
- GivingDate - The date of the offering. If more than one date is in your import file, a separate offering batch will be created for each date.
- GivingAmount - The amount given for the offering.
- FundNumber - The Fund Number in Shepherd's Staff the person is giving to.
- DocumentNumber - A check number or other identifier. This field is optional, but the column must be included in your file.
- Description - A description for the offering, up to 100 characters. This field is optional, but the column must be included in your file
- Transaction Fee - If applicable, the charge by the online giving provider for handling the transaction. You can exclude this column completely if not used; the import utility will automatically adjust for the remaining columns.

1. In Contributions under Giving>Batches click the "Import" button at the bottom of the grid and choose "Other giving source".
2. In the window that appears, choose the GivingID you're going to be matching up with that was set up in your file. You can choose the giver's envelope number, Vanco ID (Giving 1) or Giving ID 2-5. These refer to the giving ID fields within a contributor's record.
3. If your import file includes column headers, check the box for "First Row contains column headings". Shepherd's Staff will retain this setting next time you use the import utility.
4. Choose the delimiter on your file. If you used a CSV file, your delimiter will be Commas, if you used a TXT file, you'll need to look at your file and see if the information is separated by commas or tabs, and choose your delimiter appropriately.

5. To the right of the "File to import" window, click the file folder icon to bring up the file explorer window. Navigate to where you have the file saved on your computer, and double click it to open the file.

6. Click the "Import file" button. This will attempt to bring your file into Shepherd's Staff. If successful, you will see your file appear in the bottom section of the import window. Otherwise, Shepherd's Staff will provide you with a message describing what may be causing your file to not import.

7. Click the "Create" button to let Shepherd's Staff create offering batches for each date you imported offerings for.



Import from Vanco

The Vanco eGiving (EFT) import utility connects to Vanco through a web service and downloads the electronic offerings given within a specified date range.

This import process protects against duplicate postings by analyzing each downloaded offering to see if it has already been posted to Contributions or is sitting in a pending offering batch waiting to be posted.

The import process also flags offerings that have problems preventing them from being posted to Contributions. Problems can include invalid fund numbers, unassigned EOI numbers, failed or rejected credit cards, and "refunds." (Refunds must be processed separately at this time, as manual entries into Contributions.)

The utility creates a separate batch for each day on which an offering was given. Each batch is then printed and posted just like any other offering batch.

Important: Before you can use this import, you must set up an EFT (eGiving) account with Vanco. Vanco will provide your client ID, user ID, and password.

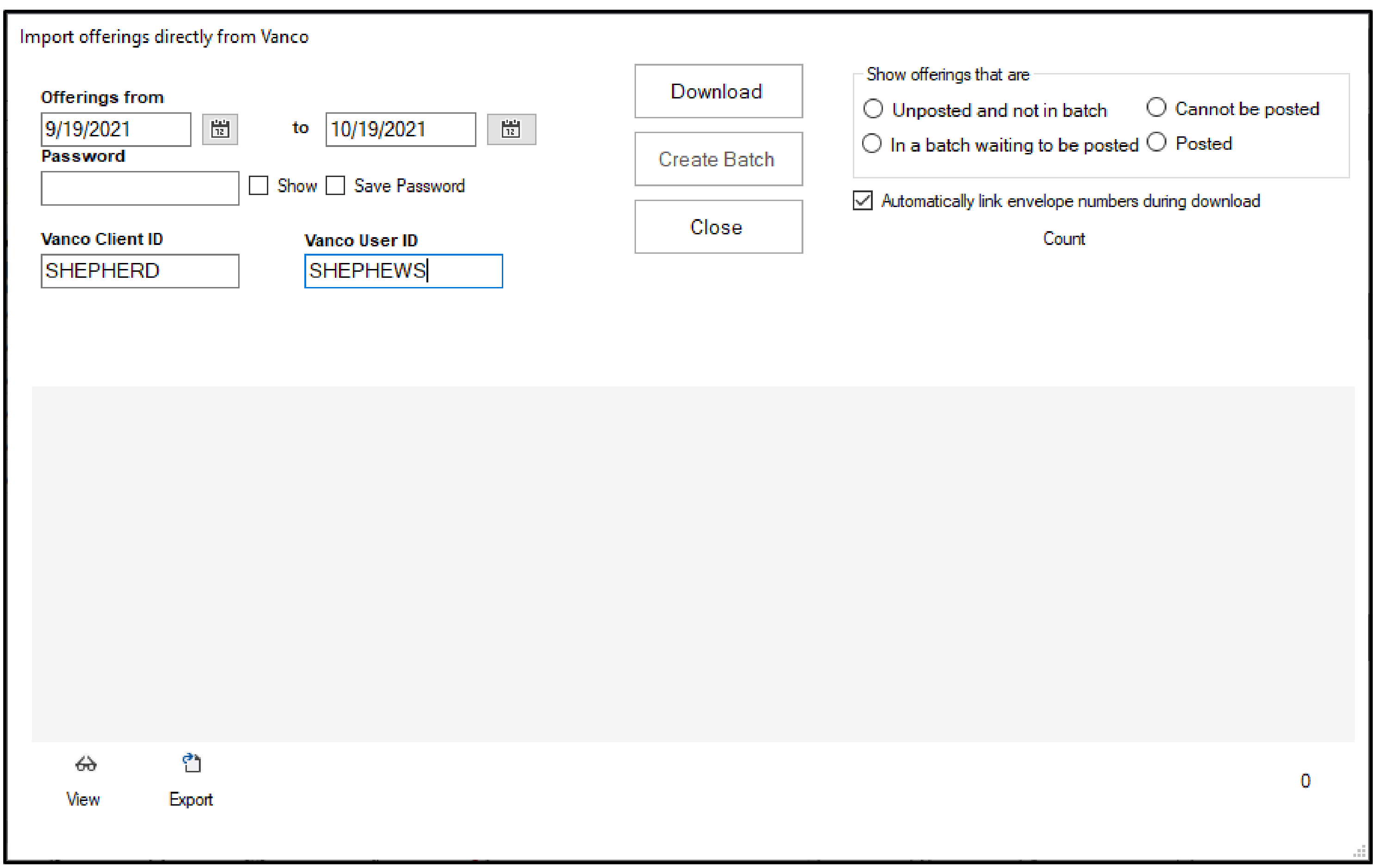
1. In the Contributions module, go to Giving>Batches
2. Click the "Import" option at the bottom of the grid, choose "Vanco" and click "Select".
3. Enter the date range for which you want to retrieve offerings from Vanco. The maximum range is 180 days.
4. Enter the password provided by Vanco. By default, the password must be entered each time you open the Vanco Import utility, but if you would like to save the password so it appears automatically each time you open the utility, check the "Save Password" box. If you check the "Show" option, this will make it so your password is not hidden when you enter it so you can check for typos.
5. Enter the Vanco Client ID and Vanco User ID. Note that the Vanco User ID refers to the WS or Web Services User ID. This is a special ID that must be requested from Vanco and is different than the UserID you use to log in to your Vanco account. These fields are saved and will automatically be filled in each time you open the Vanco Import utility.
6. Click "Download". The import utility logs into Vanco using your IDs and password, scans the offerings and separates them into various categories. If you have selected "Automatically link envelope numbers during download", the import tries to link any invalid envelope offerings from Vanco to a contributor in Shepherd's Staff. It does this by comparing the EOI number from Vanco to the envelope number. If there isn't a match, the Vanco import utility will check against the Vanco ID number and any other ID numbers that a person has on their contributor record.

7. Click “Create Batch” to create a batch for each date for the offerings that have not yet been posted or put into a batch.

Offerings downloaded from Vanco are broken up into 4 categories. They are:

- Unposted and not in batch - This category means that these offerings are not yet in a batch. Click the "Create Batch" button to put these offerings into offering batches that you can then post.
- In a batch waiting to be posted - This category means that these offerings have been downloaded and put into an offering batch, but haven't been posted yet.
- Cannot be posted - This category means that these offerings have an issue that is preventing them from being posted, such as an EOI number that doesn't match any ID in Shepherd's Staff or an invalid fund number. The status column will reveal what the issue is with each offering so you can work on troubleshooting that issue.
- Posted - This category contains offerings that have already been downloaded and posted within the date range you chose.

You can view more details about an offering record after downloading your offerings by clicking on it and clicking the "View" option. You can export all the offerings in the view that you have selected out to excel by clicking the "Export" option.

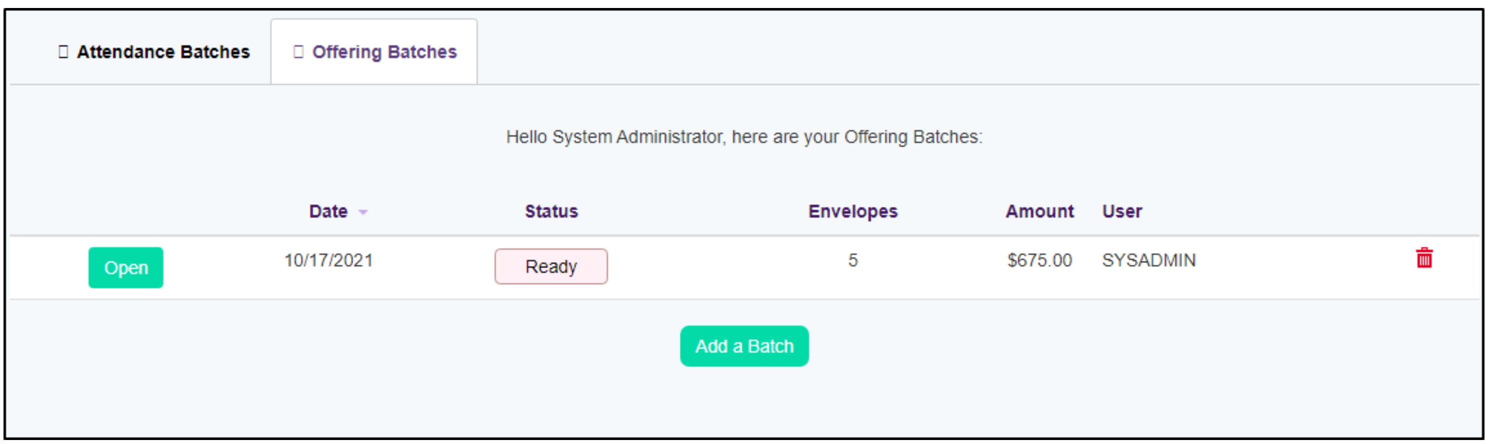


Import from Web Tools

The Web Tools feature of Shepherd's Staff allows you to enter contribution batches, even when you're away from the church. When you get back to church, you'll then be able to download your contribution batches from Web Tools into Shepherd's Staff using the Web Tools Import Utility, and then post those batches.

Note: In order to be able to import from WebTools, you must have an Active Shepherd's Staff Support contract.

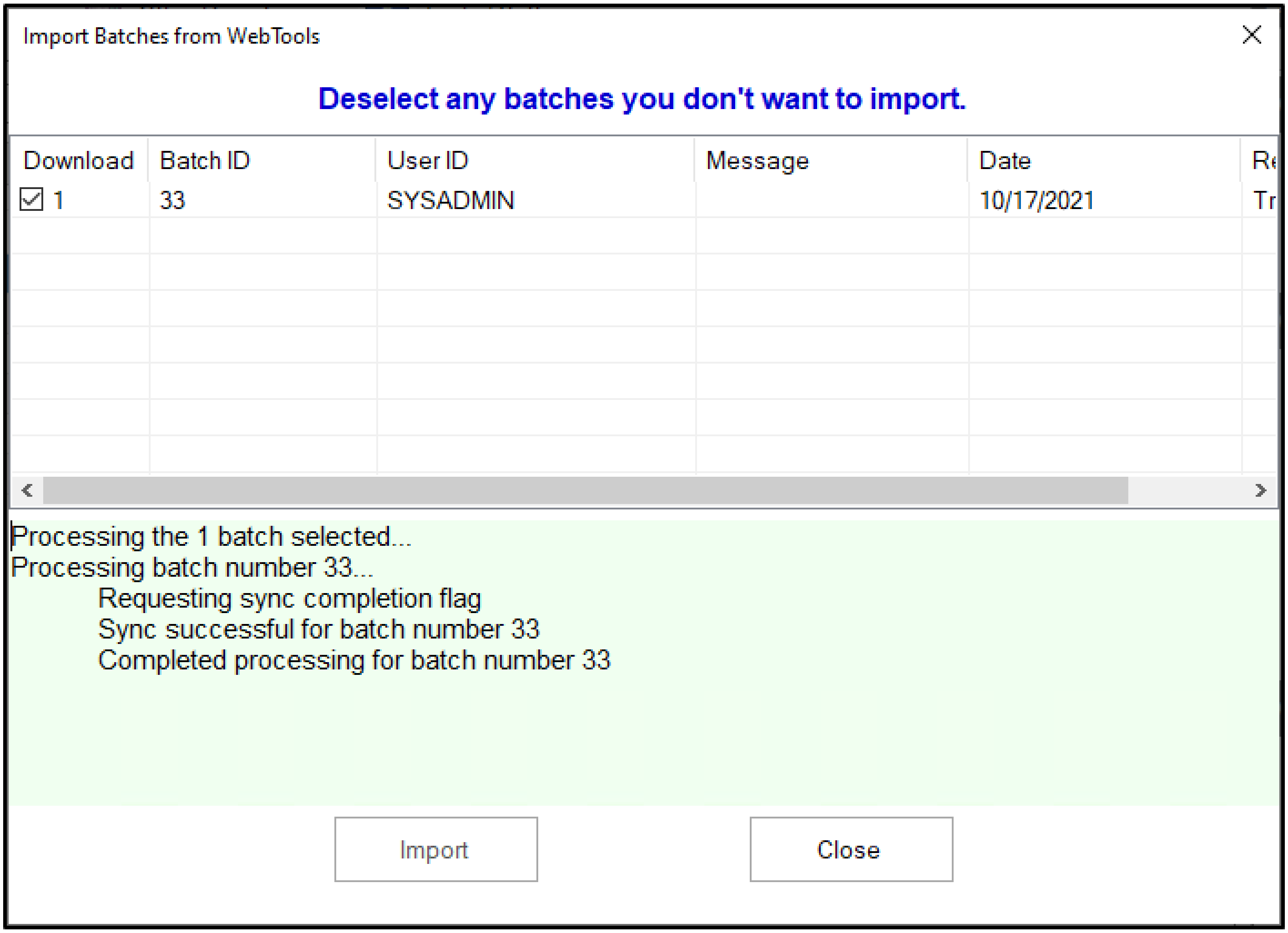
In order to be able to import your offering batches from Web Tools into Shepherd's Staff, those offering batches must be in the "Ready" status on the Web Tools website. You can put a batch into the "Ready" status by clicking on the "In Process" option in the Status column of your webtools website. This will change the status of the batch from "In Process" to "Ready"



After your offering batch has been set to the "Ready" status, you'll be able to download that offering batch using the following steps:

1. In Giving>Batches, click the Web Tools button at the bottom of the batches grid.
2. A window will appear, showing all batches that are ready to import. Make sure the box is checked next to each batch you want to import, and unchecked next to any batches you don't want to import.
3. Click the Import button at the bottom of the grid
4. Once you have received the message that each of your offering batches has completed processing, click the "Close" button

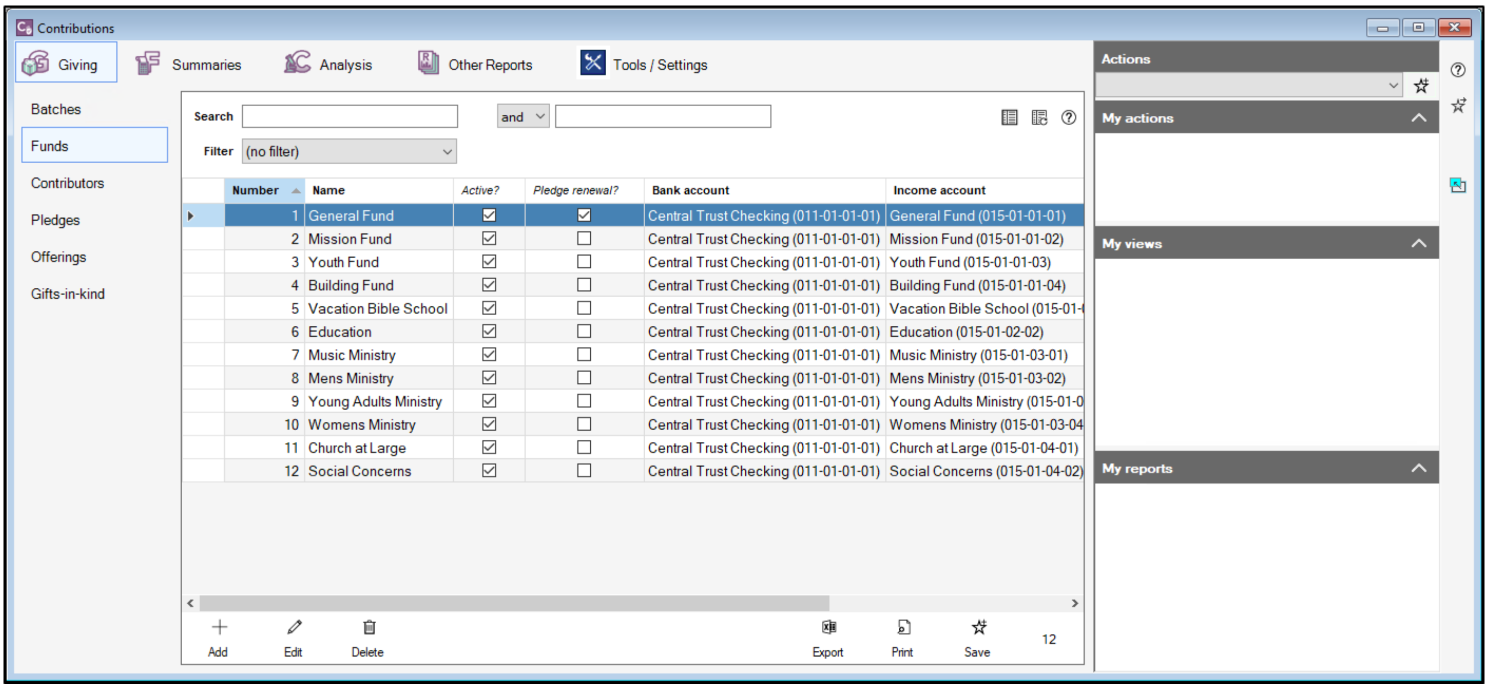
5. The offering batch(es) you imported will now appear in your unposted batches. You can then edit or post those offering batches as you could with any contribution batch in Shepherd's Staff.



Funds

A Contribution Fund is any specific area of the church for which money is donated. Some churches may have over a hundred different Contribution Funds, while other churches may just have a few. There is no limit to the number of Contribution Funds. Some examples of Funds are a General Fund, a Building Fund, an Organ Fund, and a Youth Fund. You can make these funds as general or specific as you want.

The funds record grid will show you a listing of all of your funds. You can search and filter your funds grid to find specific funds. You can also add, edit and delete funds from this window as well. The Funds grid also will let you print out a listing of your funds, both with and without associated finance accounts under the "Print" option.

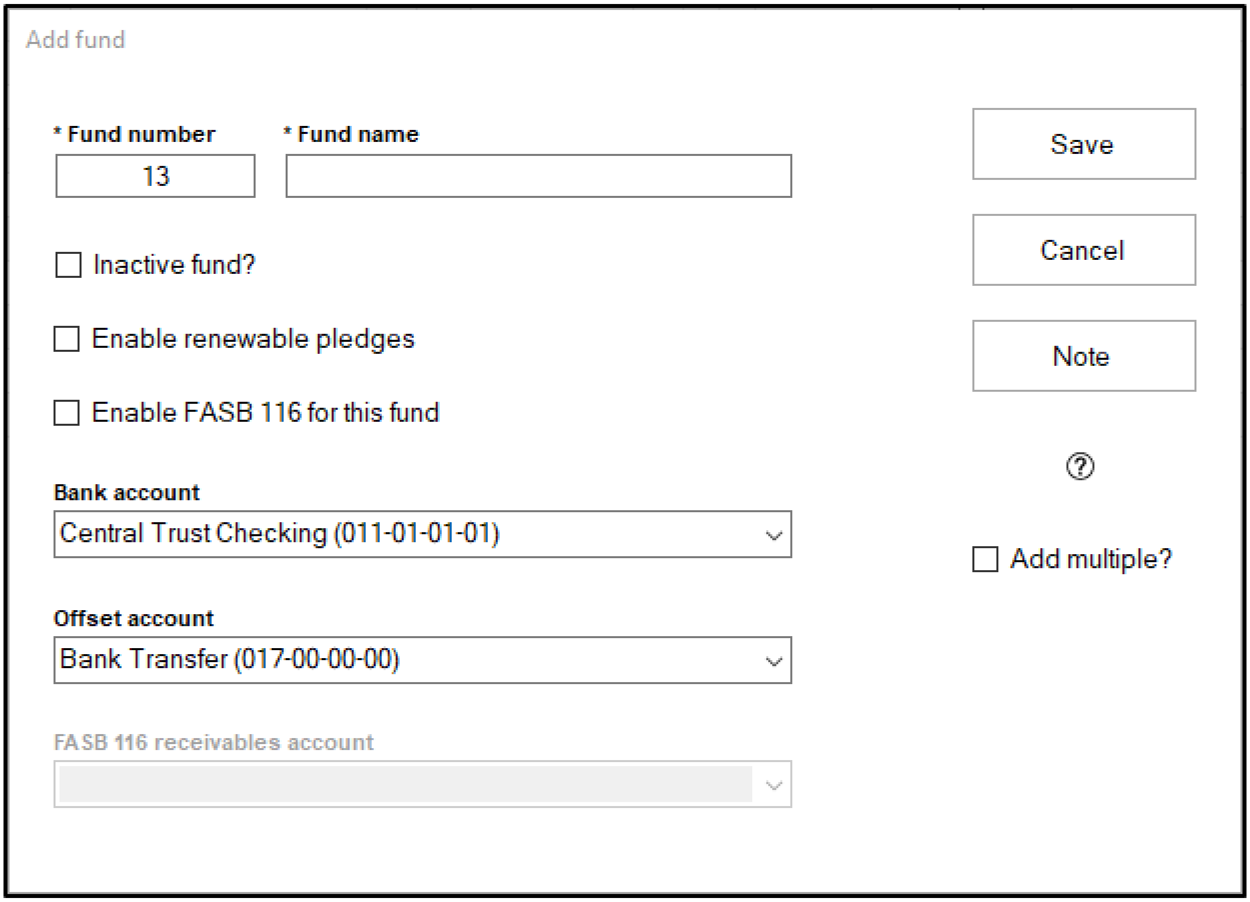


Add/Edit Fund

In order to record offerings, you'll first need to have contribution funds to record those offerings to. The article below walks you through how to add and edit fund records.

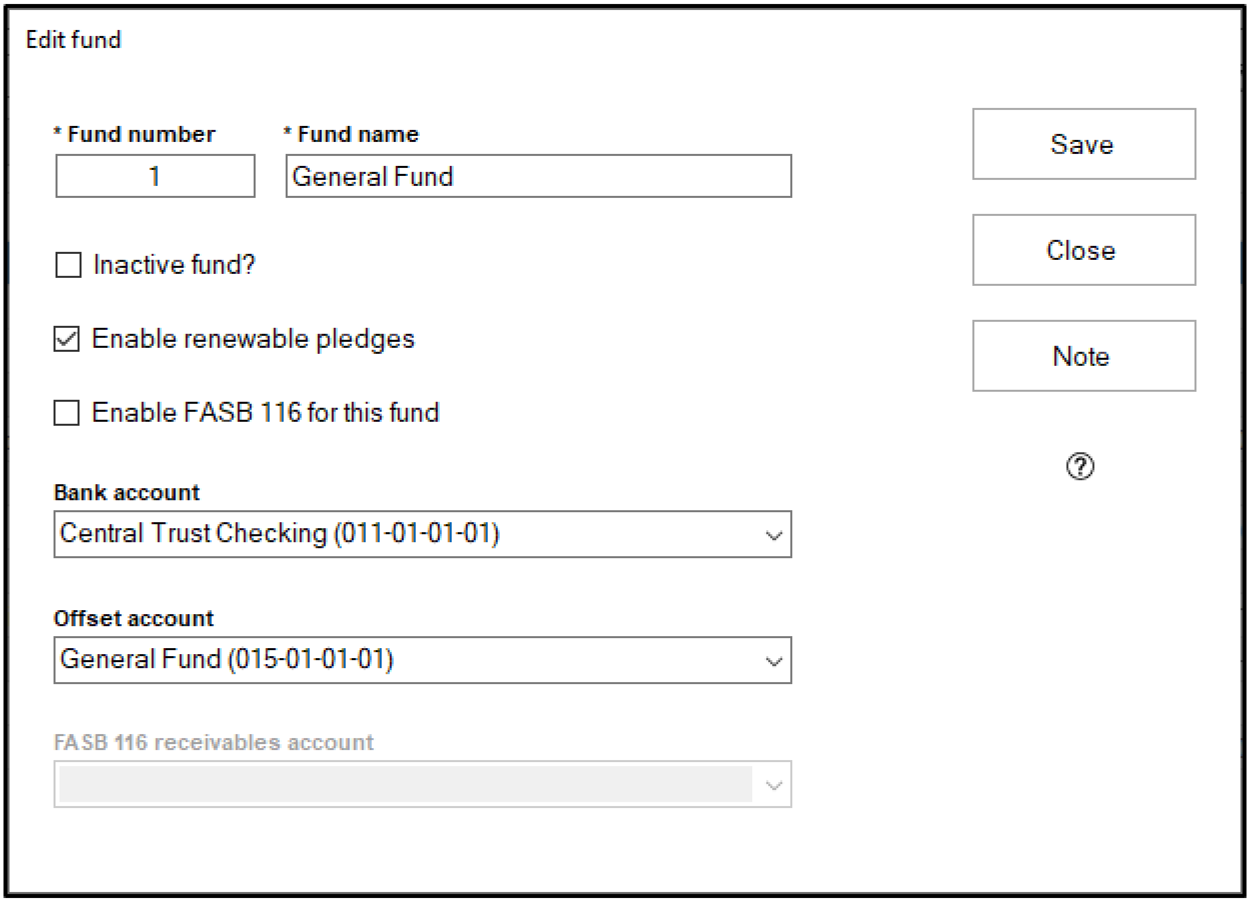
Add Fund

1. To access the Fund records, open the contributions module, and under Giving, click "Funds."
2. This will display the fund records grid showing each of your Funds.
3. To add a new Fund click the "Add" button at the bottom of the grid.
4. In the window that appears, the next fund number in sequence will automatically appear in the "Fund Number" box. You can change this to whatever available number you would like, between 1 and 999999999
5. The next three checkboxes are optional. The "Inactive fund?" checkbox will make a fund inactive. This means no new offerings can be added to that fund, but any existing offerings will still be in the system. The "Enable renewable pledges" option will make it so pledges made to this fund can be renewed for additional years. The "Enable FASB 116 for this fund" checkbox determines whether FASB 116 is considered when posting an offering batch and making an automatic deposit to the Finance module. FASB 116 should only be used under the guidance of an accounting professional.
6. The Bank account, Offset account and FASB 116 receivables account (only enabled if you check the "Enable FASB 116 for this fund" checkbox) boxes are used for directing any offerings given to this fund to the appropriate account if you elect to have Shepherd's Staff create a deposit in the finance module when posting an offering batch.
7. Click the "Note" button to add any notes you may want to record about this particular fund.
8. If adding multiple funds at once, check the "Add multiple?" box. This will keep you in the "Add fund" window so you can add your next fund when you click "Save".
9. Click "Save" when finished adding your funds.



Edit Fund

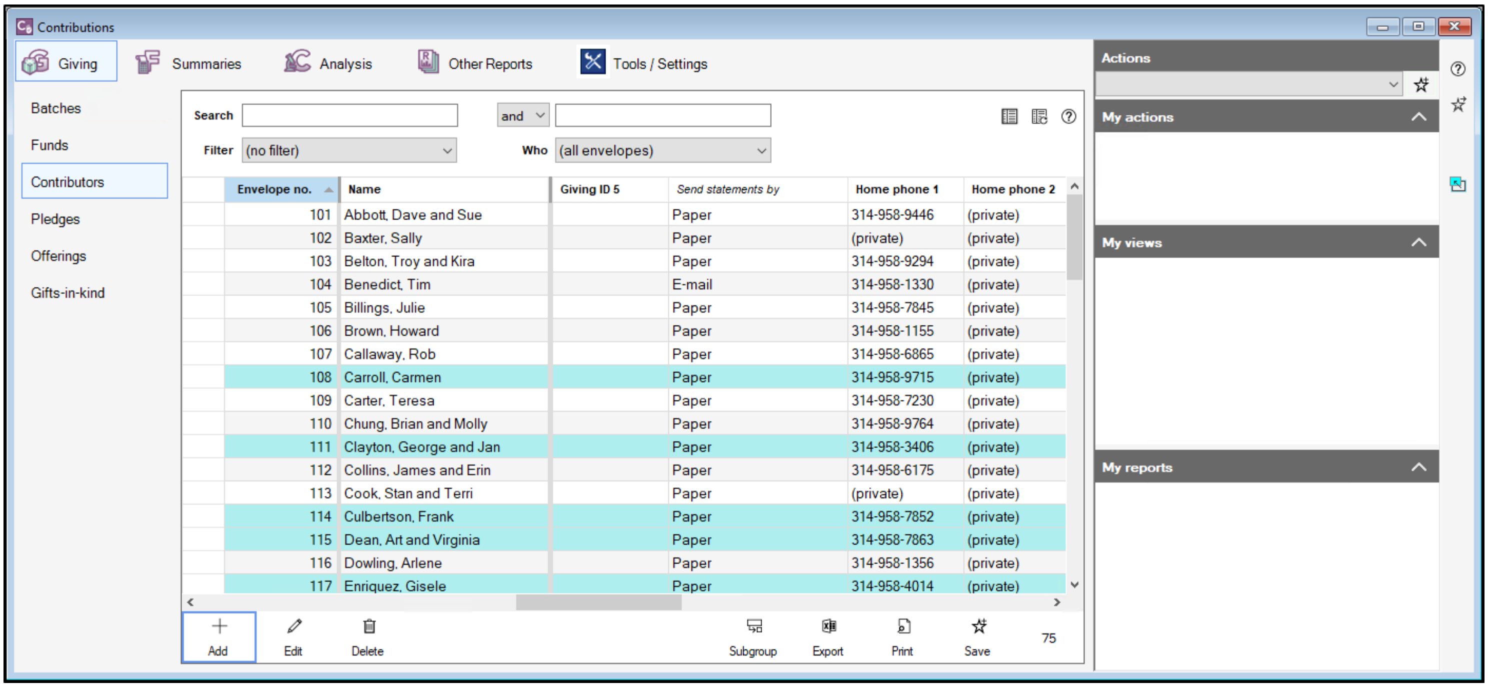
1. To access the Fund records, open the contributions module, and under Giving, click "Funds."
2. This will display the fund records grid showing each of your Funds.
3. Either double-click the fund you want to make changes to, or click the fund you want to make changes to and click "Edit" at the bottom of the grid.
4. You can then change any aspect of the fund, including Fund number, Fund name, "Inactive fund?", "Enable renewable pledges", "Enable FASB 116 for this fund" or any of the finance account boxes.
5. Click "Save" when finished editing your fund.


Edit fund
* Fund number
1
* Fund name
General Fund
Save
Close
Note
Inactive fund?
Enable renewable pledges
Enable FASB 116 for this fund
Bank account
Central Trust Checking (011-01-01-01)
Offset account
General Fund (015-01-01-01)
FASB 116 receivables account

Contributors

In Shepherd's Staff, Contributor Records are used to track and report giving for one or two individuals. In order to accomplish this, Contributor Records associate a person record from Membership with an envelope number in Contributions. Therefore, to get an envelope a person must have a person record in the Membership module (not just a household record).

The Contributor Records grid will show you a listing of all the contributors and the envelope numbers they're assigned within your database. You can search and filter your contributor record grid to find specific contributors. You can also add, edit, and delete contributors from this window as well. The ability to create contributor lists, contact lists, and mailing labels is also available under the "Print" option.



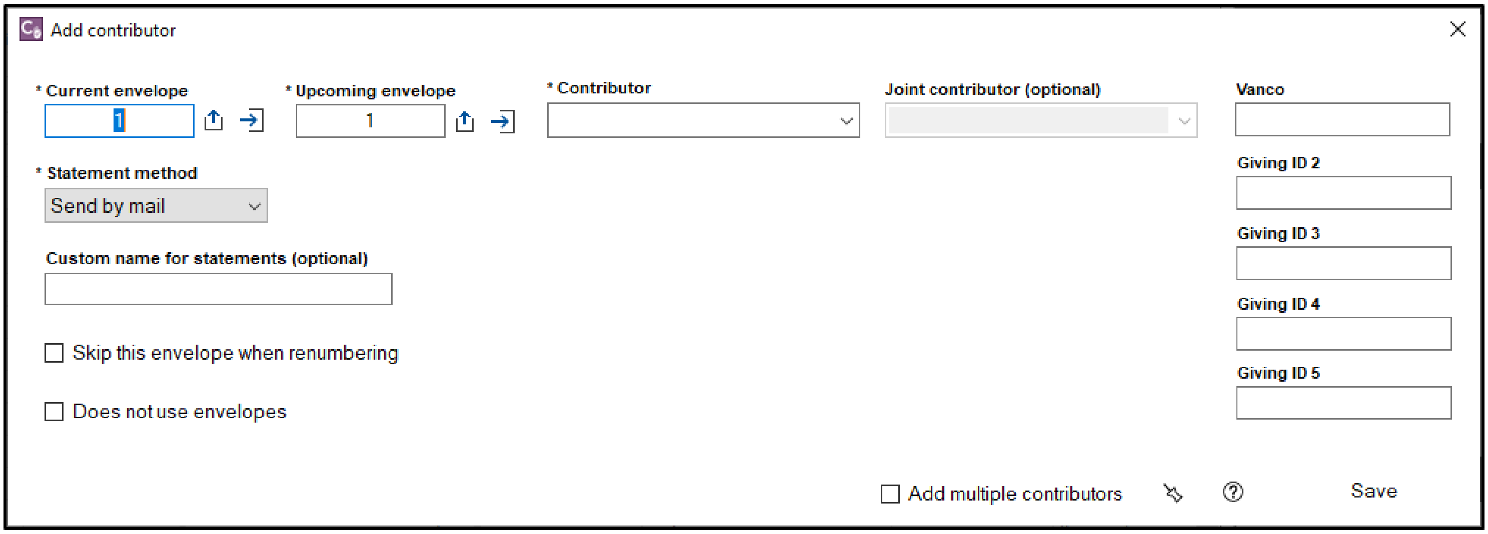
Add/Edit Contributor (Envelope)

In order to record offerings for a person, they must first have a contributor record. This article walks you through the process of adding a new contributor or editing an already existing contributor.

Add a new Contributor

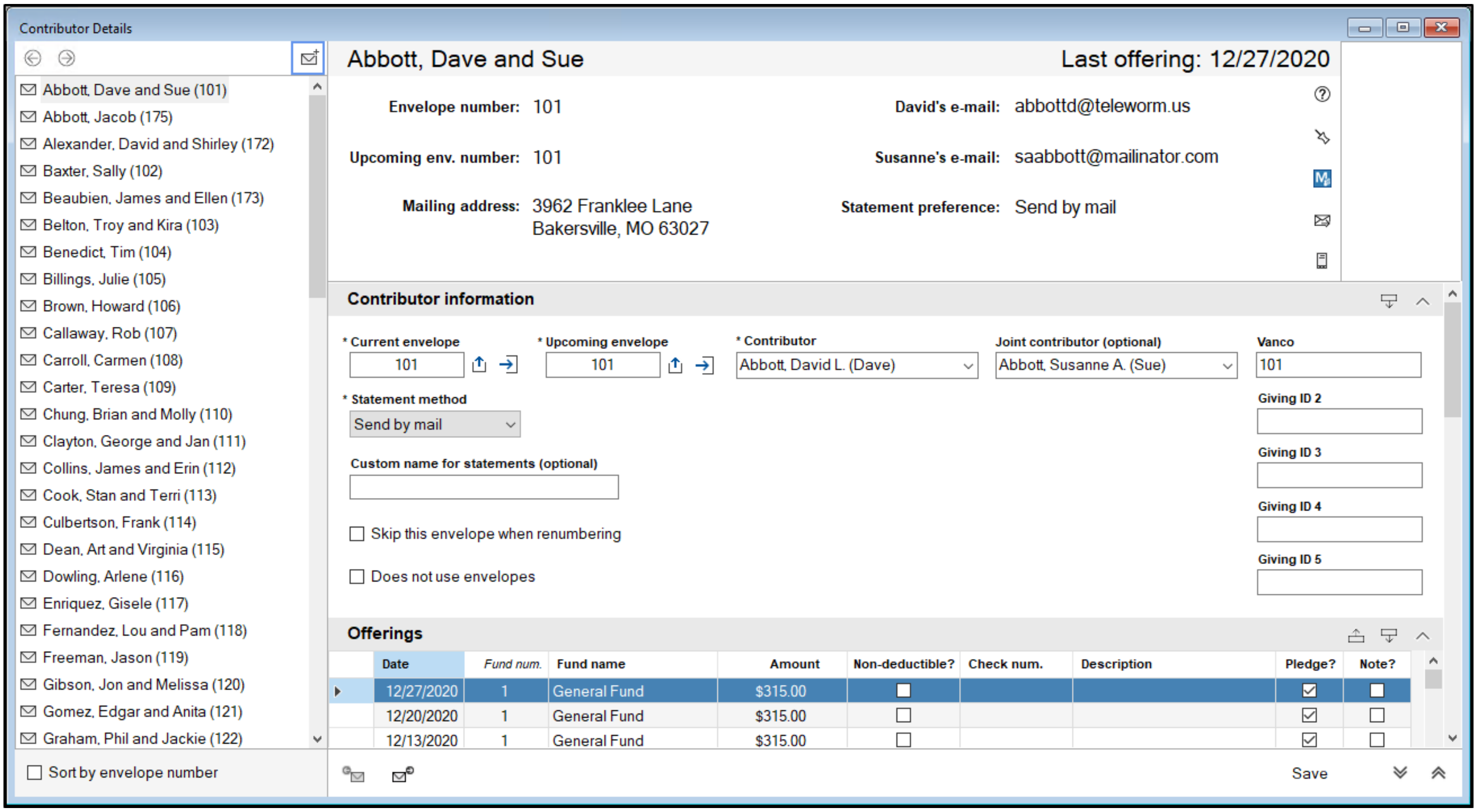
1. Access the Contributor Records grid by opening the Contributions module and go to "Giving>Contributors"
2. Click the "Add" button at the bottom of the grid to add a new envelope.
3. In the Add Contributor box, in the "Current envelope" box, select what envelope number you want to assign. The box with the up arrow coming out of it will assign the next highest number, while the button with the box with an arrow pointing to the right will assign the next available envelope number. The "Upcoming envelope" box has the same options and controls the next envelope number this contributor will be assigned.
4. In the "Contributor" box, select which person this envelope number will be assigned to. You'll only be able to select people who are not already assigned an envelope number. If there is another person in the same household who is not already assigned an envelope number, you'll be able to select that person in the "Joint contributor" box. This will make it so that the selected people will share an envelope number.
5. The "Statement method" box dictates how a person receives their contribution statements. "Send by mail" means that this person will receive a printed statement. "Send by e-mail" means that this person will receive their contribution statement via email. "DO NOT SEND" means the person will not receive a contribution statement.
6. The "Custom name for statements" field will let you use a custom name for this contributor(s) on their contribution statement.
7. If a person is no longer going to be receiving an envelope, and shouldn't be included in future envelope renumberings because they're no longer coming to your church or will no longer be contributing, check the "Skip this envelope when renumbering" box. If a person doesn't need any physical envelopes for giving, check the "Does not use envelopes" box. This option is perfect for those who only contribute electronically.
8. The Vanco and Giving ID 2-5 boxes are for the listing of any giving ID's that might be associated with a person on an e-giving platform. By listing these giving ID's here, it will make it so any imported giving, either through the Vanco import or "Other giving source" import can be associated with this contributor.

9. Check the "Add multiple contributors" box if you're adding more than one contributor record. Click the "Save" button when finished.



Edit an existing contributor

1. Access the Contributor Records grid by opening the Contributions module and go to "Giving>Contributors"
2. Find the contributor you want to make changes to and either double-click their name or click on their name and then click the "Edit" button at the bottom of the grid.
3. This will bring up the contributor record window. Here, you can edit any aspect of their envelope, including Current envelope, Upcoming envelope, Contributor, Joint Contributor, Statement method, custom name, "Skip envelope when renumbering", "Does not use envelopes" or any of the Giving IDs.
4. Click "Save" at the bottom right corner of the window to save any changes you've made.

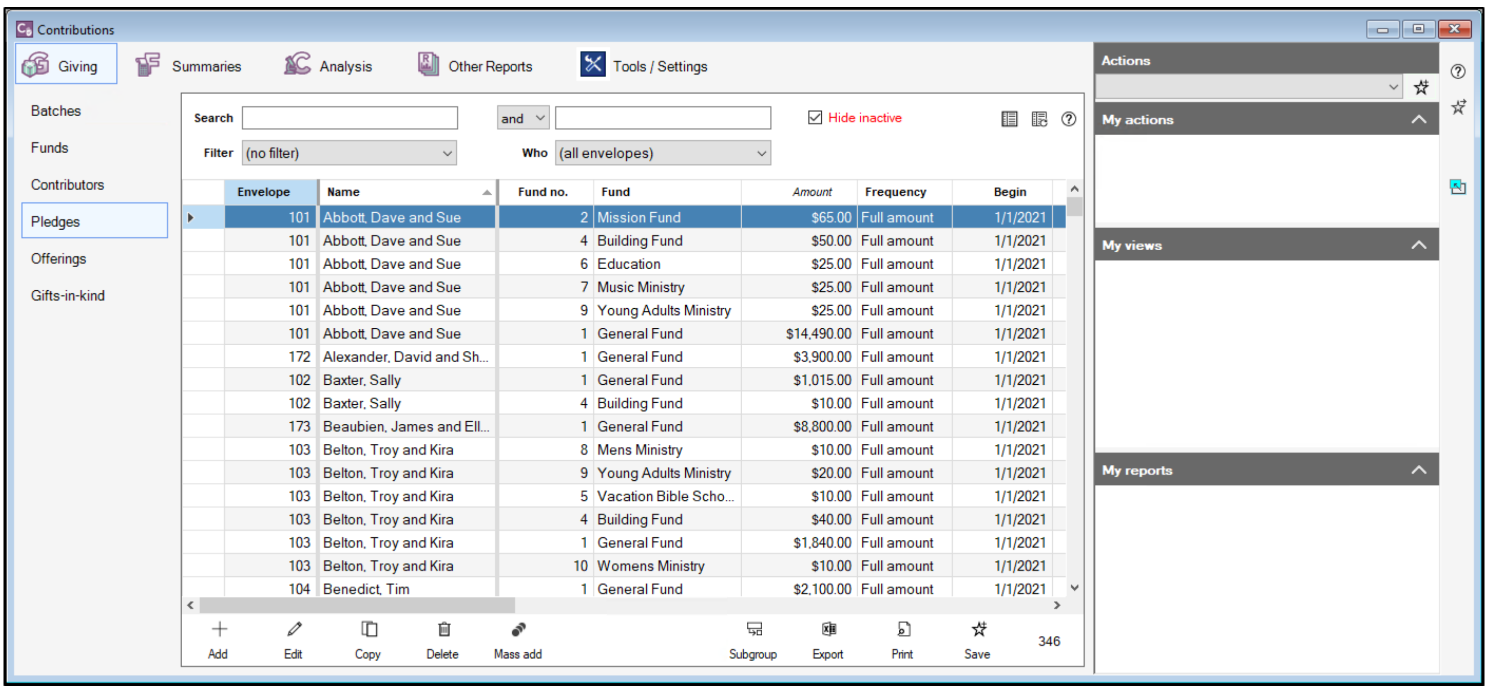

Contributor Details
Abbott, Dave and Sue (101)
Abbott, Jacob (175)
Alexander, David and Shirley (172)
Baxter, Sally (102)
Beaubien, James and Ellen (173)
Belton, Troy and Kira (103)
Benedict, Tim (104)
Billings, Julie (105)
Brown, Howard (106)
Callaway, Rob (107)
Carroll, Carmen (108)
Carter, Teresa (109)
Chung, Brian and Molly (110)
Clayton, George and Jan (111)
Collins, James and Erin (112)
Cook, Stan and Terri (113)
Culbertson, Frank (114)
Dean, Art and Virginia (115)
Dowling, Arlene (116)
Enriquez, Gisele (117)
Fernandez, Lou and Pam (118)
Freeman, Jason (119)
Gibson, Jon and Melissa (120)
Gomez, Edgar and Anita (121)
Graham, Phil and Jackie (122)
Sort by envelope number
Abbott, Dave and Sue
Last offering: 12/27/2020
Envelope number: 101
David's e-mail: abbottd@teleworm.us
Upcoming env. number: 101
Susanne's e-mail: saabbott@mailinator.com
Mailing address: 3962 Franklee Lane
Bakersville, MO 63027
Statement preference: Send by mail
Contributor information
* Current envelope
101
* Upcoming envelope
101
* Contributor
Abbott, David L. (Dave)
Joint contributor (optional)
Abbott, Susanne A. (Sue)
Vanco
101
* Statement method
Send by mail
Giving ID 2
Custom name for statements (optional)
Giving ID 3
Skip this envelope when renumbering
Giving ID 4
Does not use envelopes
Giving ID 5
Offerings
Date
Fund num.
Fund name
Amount
Non-deductible?
Check num.
Description
Pledge?
Note?
12/27/2020 1 General Fund $315.00
12/20/2020 1 General Fund $315.00
12/13/2020 1 General Fund $315.00
Save

Pledges

A pledge is a record you can enter for a contributor that lets that contributor establish a giving goal to a particular fund over a specific period of time. Pledges help the church in setting budgets and spending over time by knowing how much money they can expect to receive over a time period.

The pledge grid contains all pledge records. The pledge grid provides an overview of your contributor's pledges, including progress towards their pledges. Before adding pledges, review our article on "Pledge Rules" for rules to keep in mind as you add pledges to your system. The pledges grid will only show active, or currently ongoing pledges in the grid by default, but if you want to see pledges that have already been completed or any upcoming pledges, uncheck the "Hide inactive" box. You can search and filter your pledges grid to find specific pledges.

Note: Pledges can be fulfilled by a gift-in-kind. See our article on "Gifts-in-kind" for more details.



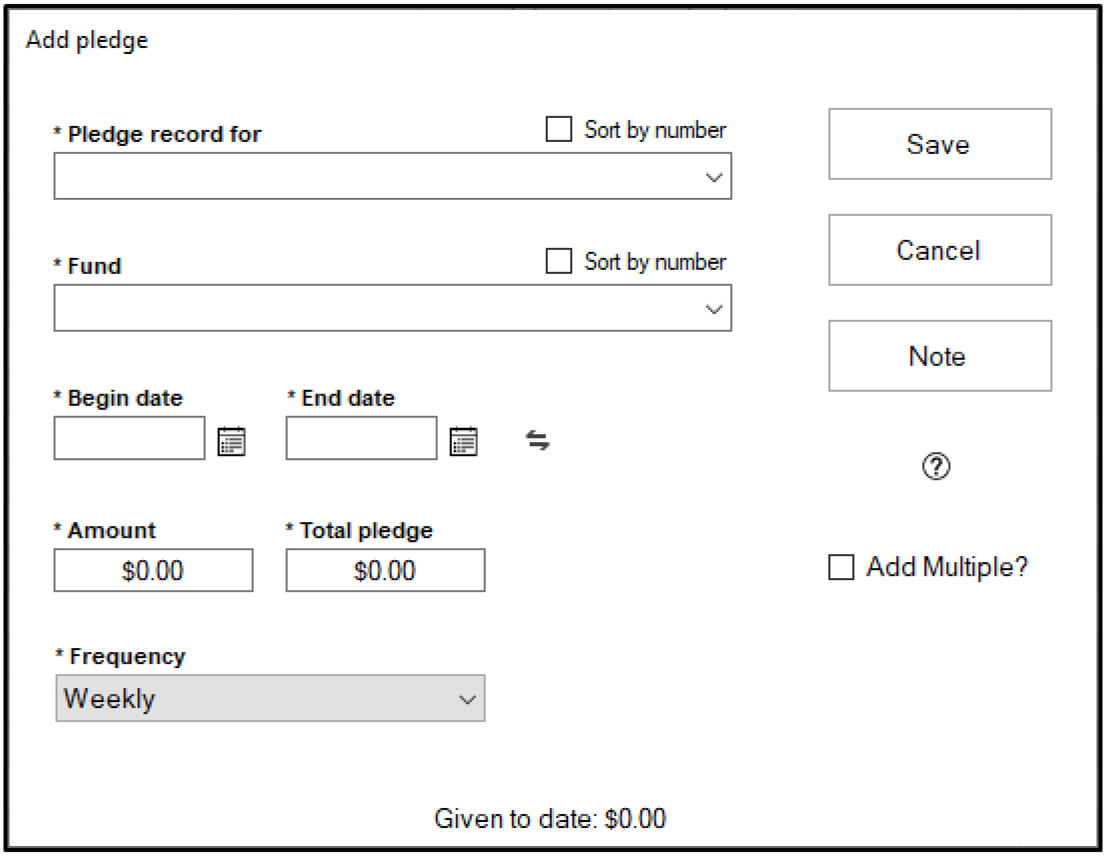
Add/Edit Pledge

In order for offerings given towards a pledge to count for a pledge, the pledge record must be recorded first. The article below walks through how you can add and edit pledge records.

Note: If a contributor gives wants to establish a new pledge for a fund that they've pledged to in the past make sure to create a new pledge record for this new pledge. Editing a previous pledge record will get rid of the previous year's pledge.

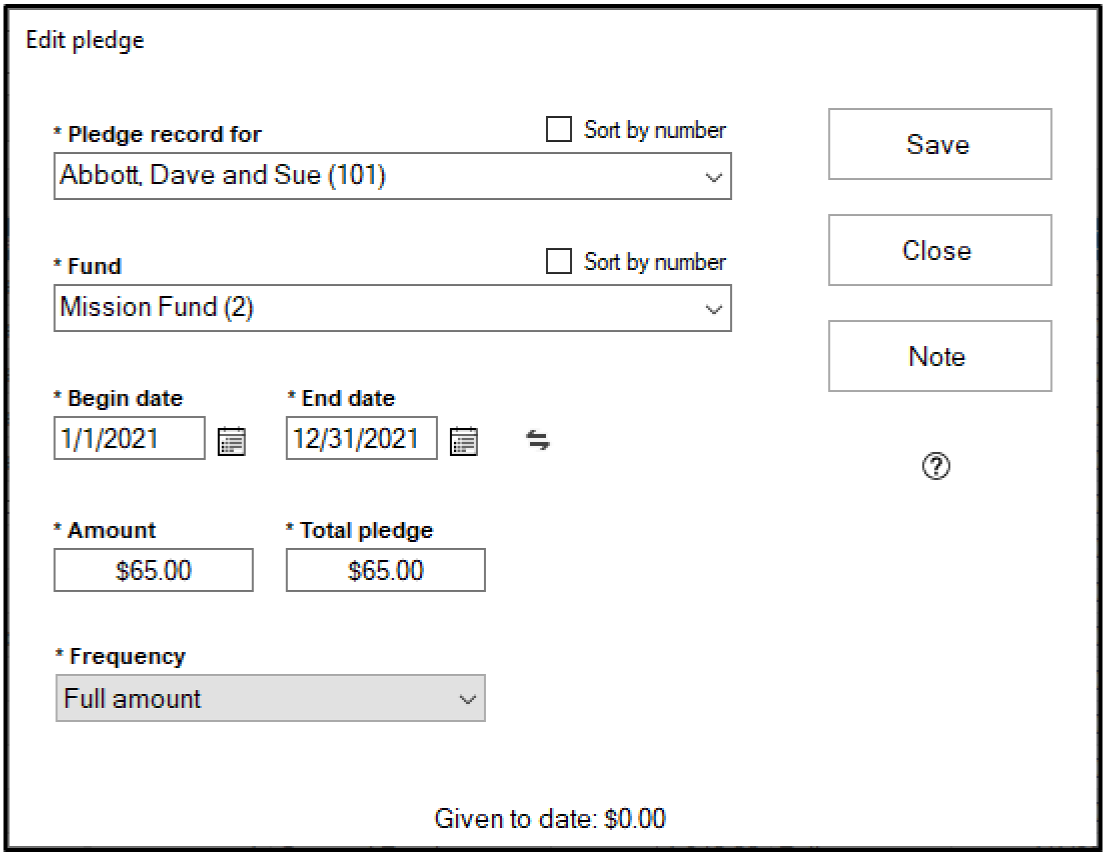
Add Pledge

1. To access the pledge records, open the contributions module, and under Giving, click "Pledges"
2. To add a new Pledge, click the "Add" button at the bottom of the grid.
3. The "Pledge record for" box will let you select which contributor this pledge is for. Check the "Sort by number" box to sort this box by envelope number instead of envelope name.
4. The "Fund" box will let you select which fund this pledge is for. Check the "Sort by number" box to sort this box by fund number instead of fund name.
5. The Begin date and End date boxes let you establish the date range of this pledge. Any offerings given to this fund by this contributor within the established date range will count towards this pledge. If you click the button with the arrows pointing left and right to the right of the begin and end dates, the first and last day will be filled into the Begin date and End date fields respectively.
6. The Amount box refers to the contribution total the contributor will be giving per the frequency they're giving to this pledge. The Total pledge box is the amount this contributor is committing to giving over the life of the pledge. The Frequency box tells how frequently this contributor will be giving to the pledge.
7. If you fill out an amount in the "Amount" box and have chosen a frequency, the total pledge will be calculated automatically based on the date range of the pledge. Alternatively, if you fill in the "Total Pledge" along with a frequency, the amount will be calculated based on the date range of the pledge.
8. If you're going to be adding multiple pledges, check the "Add Multiple?" box before clicking "Save". Otherwise, just click "Save" to save your pledge record.



Edit Pledge

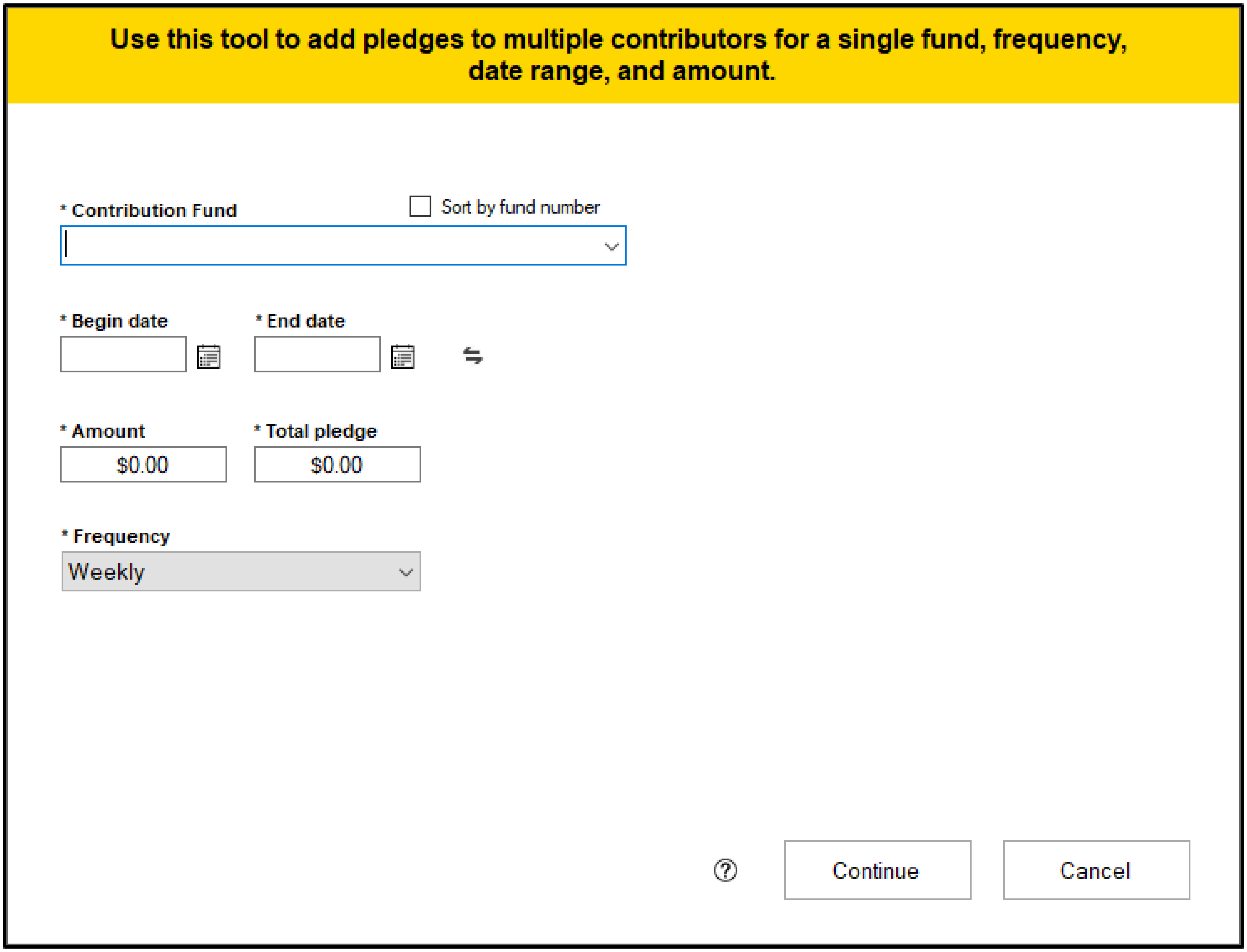
1. To edit a pledge, access the pledge record grid, and find the pledge record that you need to make a change to.
2. Double-click or click on the pledge record and then click "Edit" to start editing the pledge record.
3. You can edit any aspect of a pledge, including who the pledge is for, which fund the pledge is for, beginning and ending dates, amount, total pledge or frequency. Click "Save" when finished editing.


Edit pledge
* Pledge record for
Sort by number
Abbott, Dave and Sue (101)
* Fund
Sort by number
Mission Fund (2)
* Begin date
1/1/2021
* End date
12/31/2021
* Amount
$65.00
* Total pledge
$65.00
* Frequency
Full amount
Given to date: $0.00
Save
Close
Note

Mass add pledges

If you have to enter the same pledge for multiple people, the Mass add option is a good way to quickly add this pledge for more than one person at once.

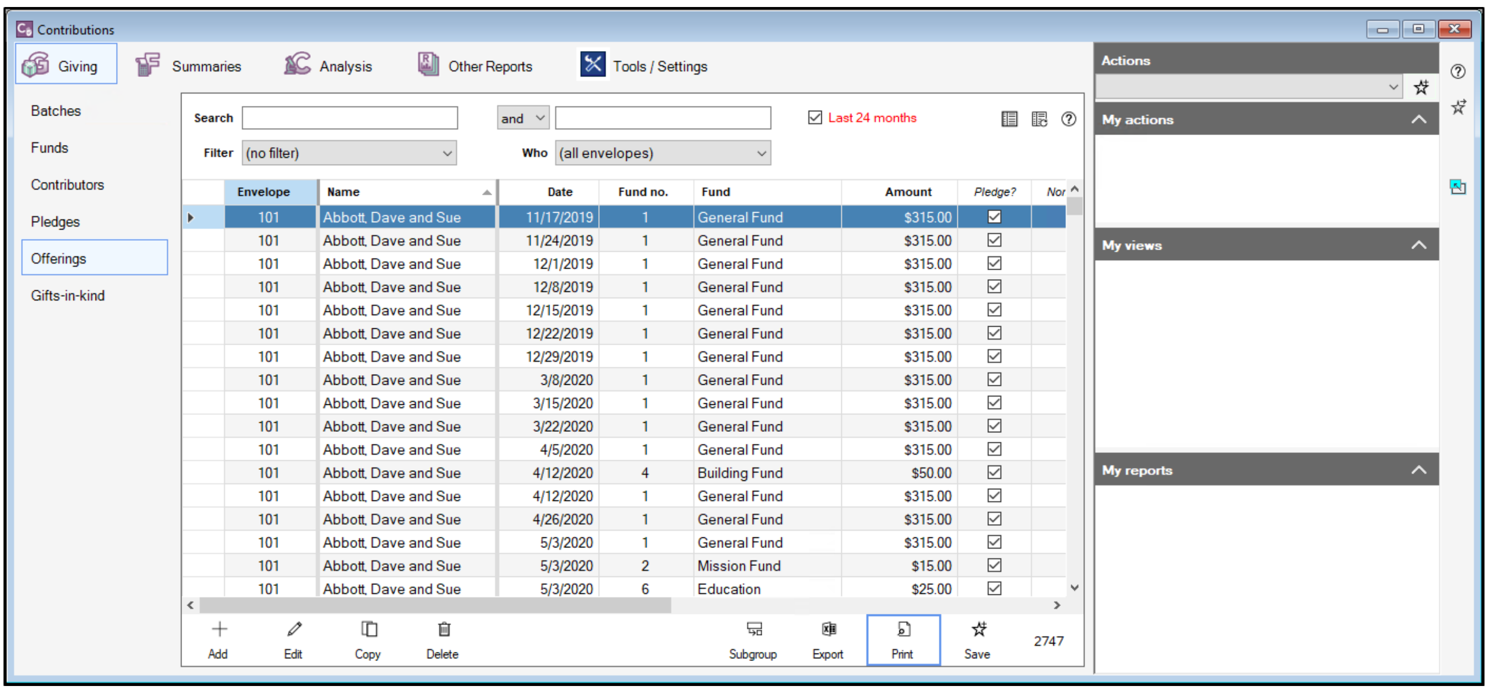
1. To add pledges in mass, access the pledge record grid, and click the "Mass add" option at the bottom of the grid. You can also access this tool from the Pledge Tools in the Tools/Settings menu in the Contributions module.
2. In the window that appears, select the fund for these pledges in the "Contribution Fund" box. Check the "Sort by fund number" if you prefer to have this field sorted by fund number instead of fund name.
3. Set the Begin and End dates for the pledge, as well as the Amount, Total pledge and Frequency.
4. Click the "Continue" button
5. In the next window, you'll see all contributors who are eligible to make a pledge to the selected fund in the "Contributors for pledge" box. Check the "Sort by envelope number" box if you prefer to have this field sorted by envelope number. Click on a contributor and click the "Add" button to add that contributor to the "Selected Contributors" section. This is the list of people who will have this pledge added to their record. Click the "Remove" button to remove the selected record from the selected contributors section. The "Add all" button will add everyone in the "Contributors for pledge" box to the "Selected contributors" box, and the "Remove all" button will remove everyone from the "Selected contributors" section.
6. Click continue after making your selections, and you'll be shown a screen so you can confirm your work. If you'd like to export this list of contributors to Excel, click the "Export" button. When you're ready to add the pledges, click the "Finish" button.


Use this tool to add pledges to multiple contributors for a single fund, frequency, date range, and amount.
* Contribution Fund
Sort by fund number
* Begin date
* End date
* Amount
$0.00
* Total pledge
$0.00
* Frequency
Weekly
Continue
Cancel

Offerings

The Offerings view shows all offering records within a selected period of time. Offering records can be created individually or created through an offering batch. The offerings view is a good way to look for individual offerings from a particular time period.

The Offering Records grid will show you who gave a particular offering, as well as the date, fund, amount, and if an offering was a part of a pledge. You can search and filter your offerings record grid to find specific offering records. By default, the Offering Records grid will only show you offerings that fall within the last 24 months, but you can look at all offerings by unchecking the "Last 24 months" box in the top right corner of the grid. You can also add, edit, copy or delete offering records from this window. Various offering record reports can be created from this view under the print button, including lists sorted by givers, funds, or date, and mailing labels can be created from here as well.



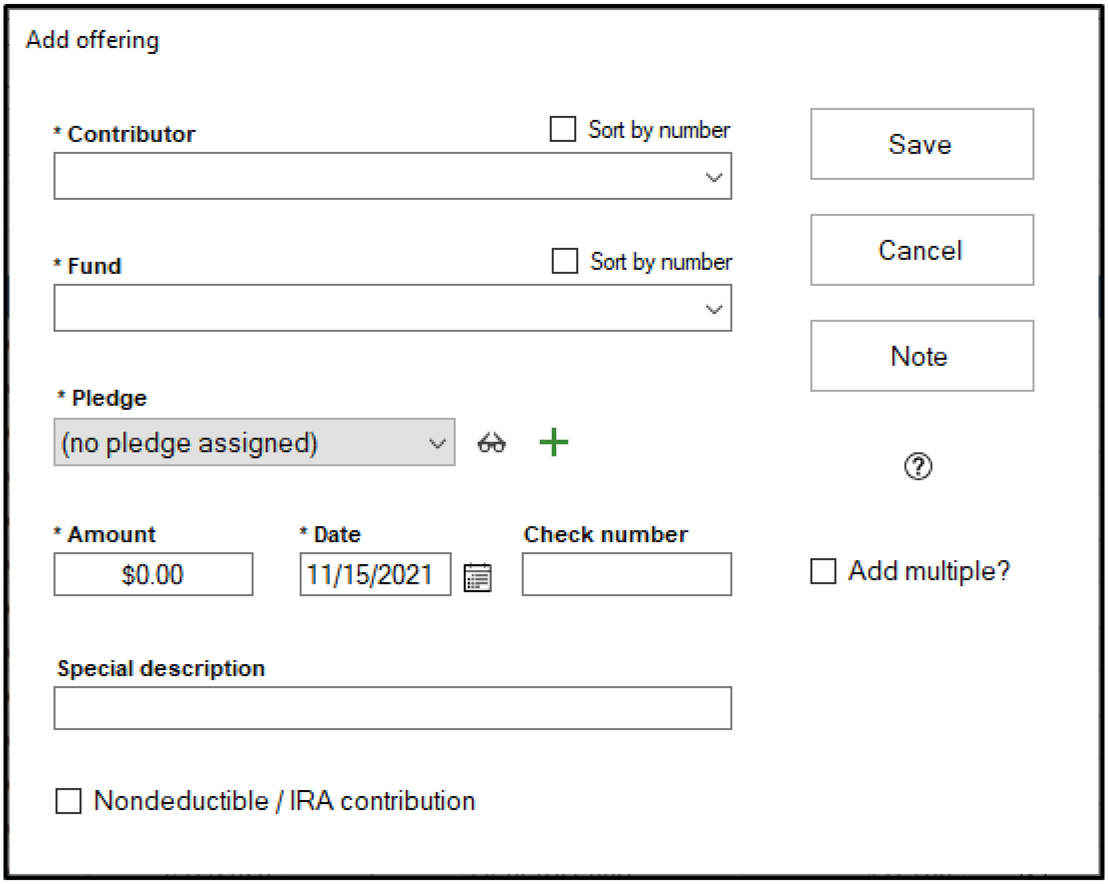
Add/Edit Offering

Offering records represent the contributions your contributors have made to your church. This article walks you through creating and editing individual offering records.

Note: If you're trying to add offerings for more than one person at once, or if you want these offerings to be prepared as a deposit into your finance module, you should instead add these offerings as an offering batch.

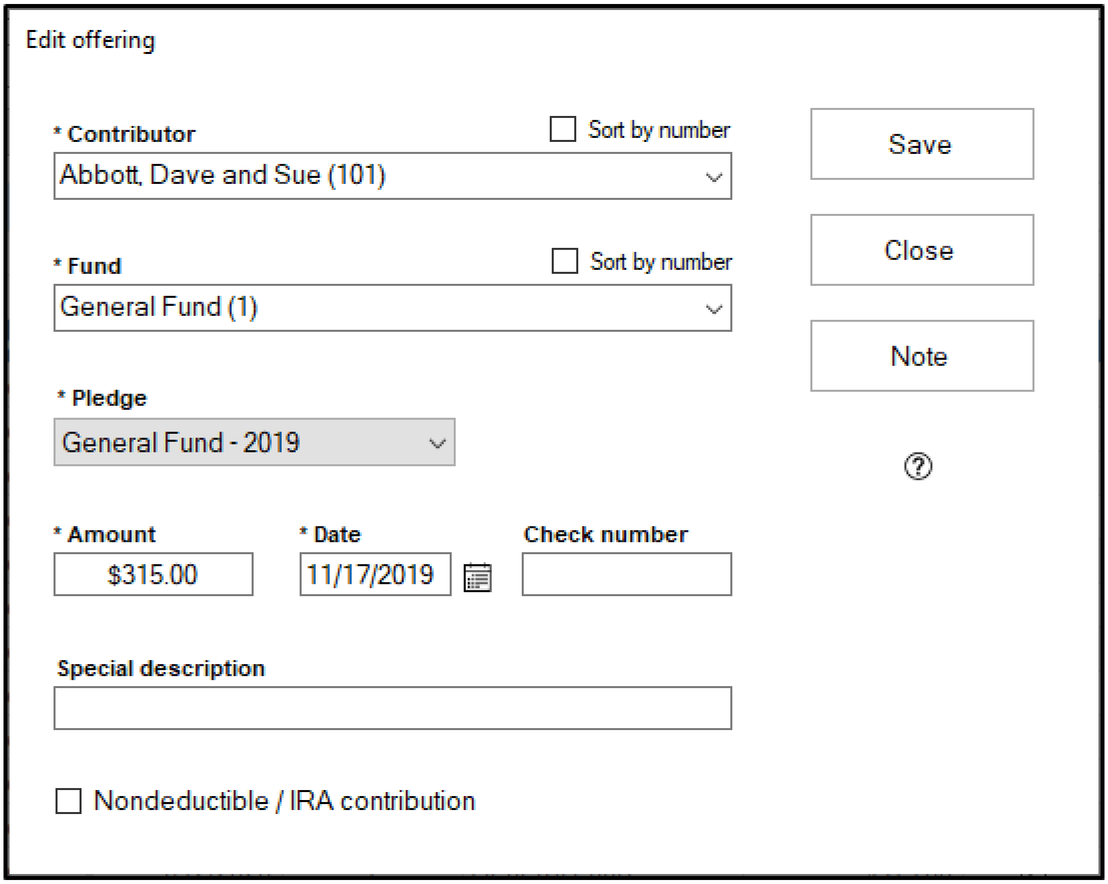
Add Offering

1. To access the offering records, open the contributions module and under Giving, click "Offerings"
2. To add a new offering, click the "Add" button at the bottom of the grid.
3. In the window that appears, select who is giving this offering by selecting the appropriate contributor in the "Contributor" box. You can sort this field by envelope number instead of by name by checking the "Sort by number" box. If this is a loose offering, select the (anonymous) (0) option. Or, if this is a gift from a person who doesn't have an envelope number in your system, and you don't want to give them an envelope number, select the "Other Giver" option. This is good for one-time gifts that you want to be able to provide a statement for. After clicking into the next field, you'll be prompted to fill out the contact information for this giver if you chose the "Other Giver" option.
4. Select which contribution fund this offering is for in the "Fund" box. You can sort this field by fund number instead of by fund name by checking the "Sort by number" box.
5. If this offering is part of a pledge, select which pledge this offering is a part of in the "Pledge" box. The pledge box will only show pledges over the last two years by default, but if you click the glasses button to the right of this window, it will show all previous pledges to the selected fund for this giver. Click the green plus sign to the right of the pledge field to add a new pledge.
6. Fill in the Amount, Date, Check number (if the offering was given by check), and Special description (if there are any notes on this offering that you want to appear on a contribution statement).
7. If this is a Nondeductible/IRA contribution gift, check the box to indicate this.
8. If adding another offering, check the box for "Add multiple?". Click save to add your next offering. Or, if this is the only offering you're adding, click Save to save your offering record.



Edit Offering

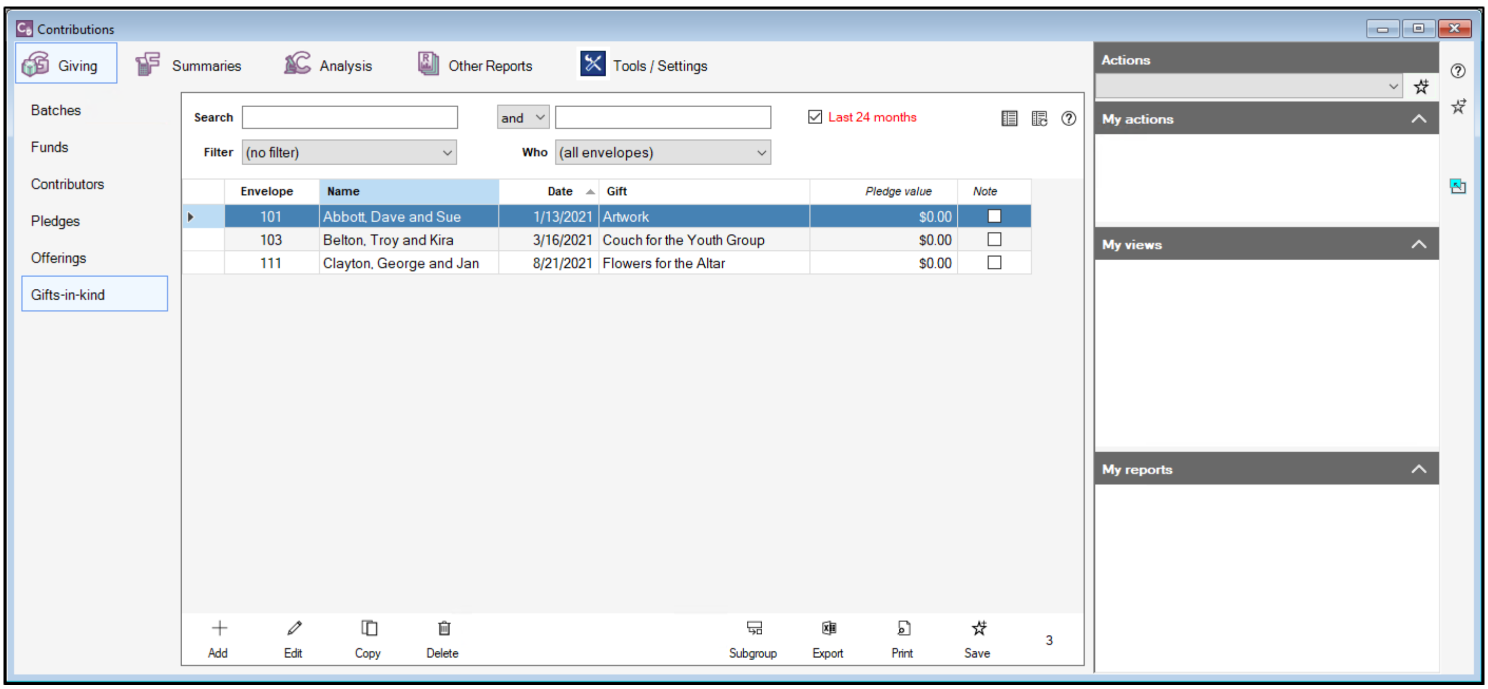
1. To edit an offering, access the offering records grid, and find the offering record that you need to make a change to.
2. Double click or click on the offering record and then click "Edit" to start editing the offering record.
3. You can edit any aspect of an offering, including who the offering was given by, what fund it was given to, what pledge the offering was a part of, amount, date, check number, special description, and Nondeductible/IRA contribution status. Click "Save" when finished editing.


Edit offering
* Contributor
Sort by number
Abbott, Dave and Sue (101)
* Fund
Sort by number
General Fund (1)
* Pledge
General Fund - 2019
* Amount
$315.00
* Date
11/17/2019
Check number
Special description
Nondeductible / IRA contribution
Save
Close
Note

Gifts-In-Kind

Gifts-In-Kind represent all non-monetary gifts your church receives. The Gifts-In-Kind view shows all gift-in-kind records within a selected period of time.

The Gifts-In-Kind grid will show you who gave a particular gift-in-kind, as well as the date they gave it, what that gift is, and if entered, the value that gift holds towards the fulfilment of a pledge. By default, the Gifts-In-Kind view shows only the Gifts-In-Kind from the last 24 months, but you can look at all gifts-in-kind by unchecking the "Last 24 months" box in the top right corner of the grid. You can also add, edit, copy or delete gift-in-kind records from this window as well. A report of all the currently shown gifts-in-kind can be prepared by clicking the "Print" button at the bottom of the grid.

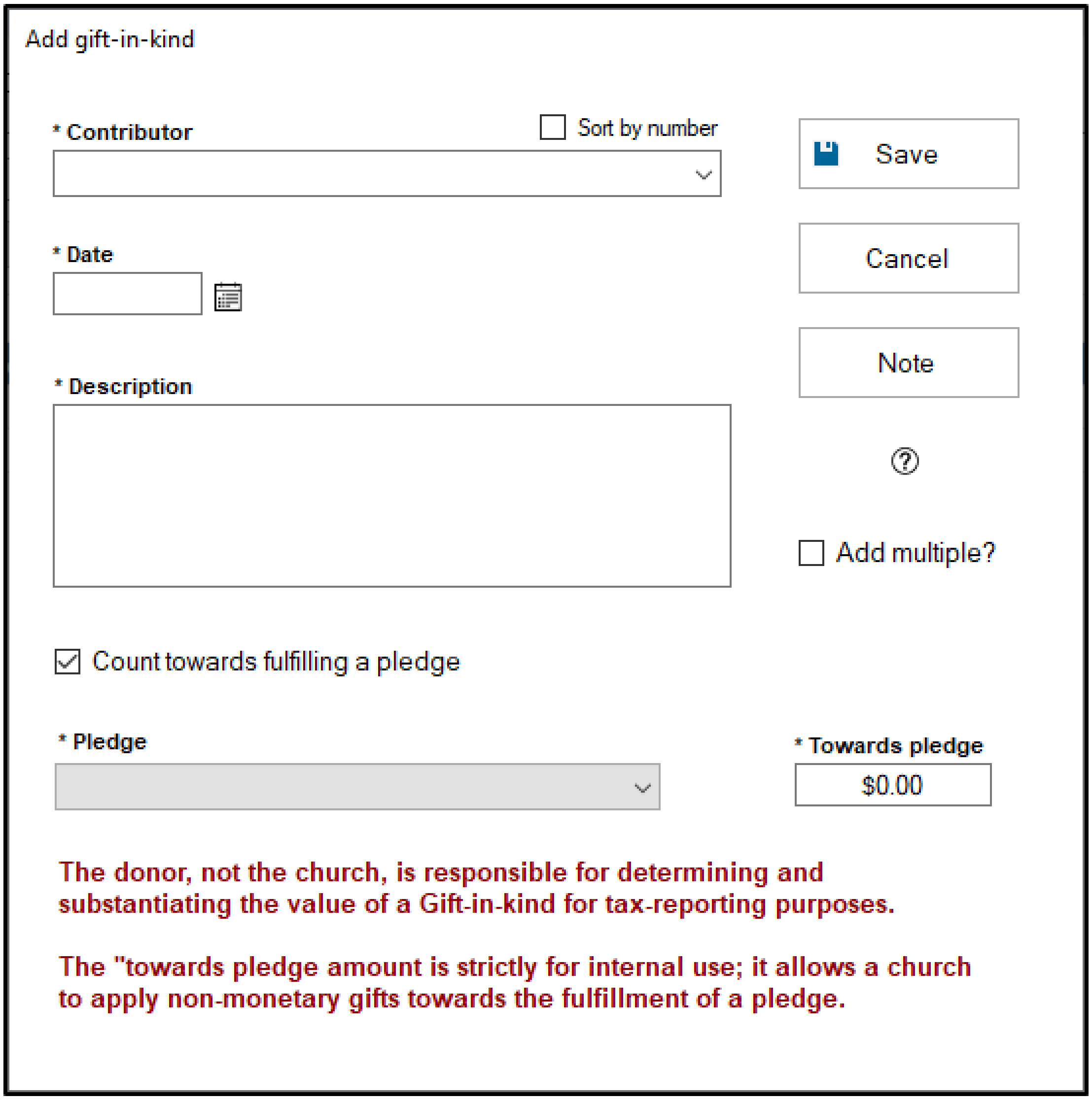


Add/Edit Gift-in-kind

Gift-in-kind records represent the non-monetary contributions your contributors have made to your church. This article walks you through creating gift-in-kind records.

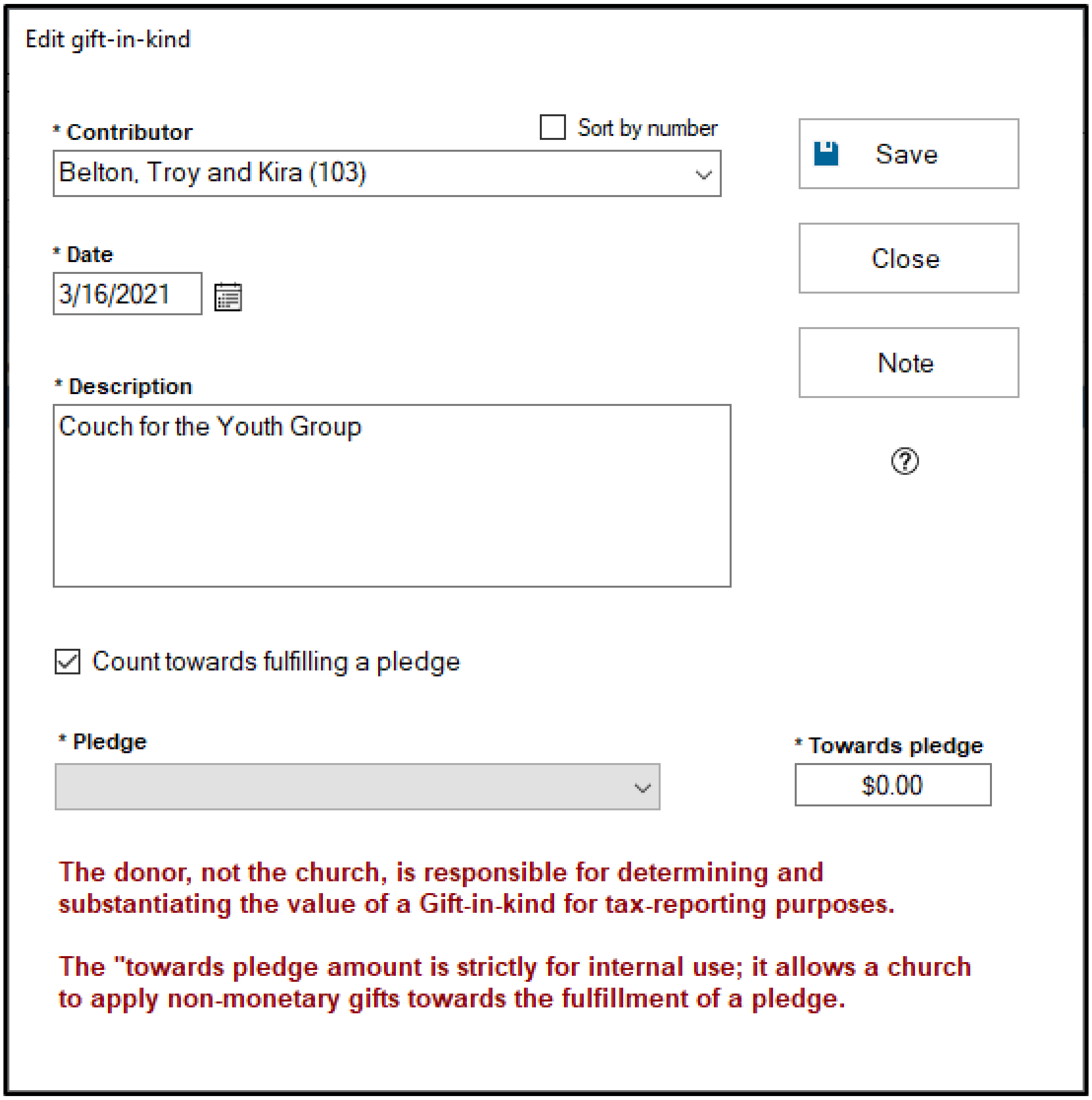
Add Gift-in-Kind

1. To access the Gift-in-Kind records, open the contributions module, and under Giving, click "Gifts-in-kind"
2. To add a new gift-in-kind, click the "Add" button at the bottom of the grid.
3. In the window that appears, select who is giving this gift-in-kind by selecting the appropriate contributor in the "Contributor" box. You can sort this field by envelope number instead of by name by checking the "Sort by number" box. If this is an anonymous gift, select the (anonymous) (0) option. Or, if this is a gift from a person who doesn't have an envelope number in your system, and you don't want to give them an envelope number, select the "Other Giver" option. This is good for one-time gifts that you want to be able to provide a statement for. After clicking into the next field, you'll be prompted to fill out the contact information for this giver if you chose the "Other Giver" option.
4. Next, select the date, and fill in a description of what the gift-in-kind is. Be sure to be descriptive, as this will appear on the contributor's gift-in-kind statement.
5. If this gift-in-kind should count towards the fulfilment of a pledge, check the "Count towards fulfilling a pledge" box. This will let you then choose which pledge for this contributor this gift-in-kind should count for, and the amount it should count for towards the pledge.
6. Check the "Add multiple?" box if you're adding more than one gift-in-kind, and then click "Save" to go to the next gift-in-kind record. Otherwise, click "Save" when you're finished adding the gift-in-kind record.



Edit Gift-in-Kind

1. To edit a gift-in-kind, access the gifts-in-kind grid and find the gift-in-kind record you need to make a change to.
2. Double click or click on the gift-in-kind record and then click "Edit" to start editing the gift-in-kind record.
3. You can edit any aspect of a gift-in-kind record, including who the gift-in-kind was given by, the date of the gift-in-kind, the description, if the gift-in-kind counts towards a pledge, and if so, which pledge it belongs to and how much it counts towards the fulfillment of that pledge. Click "Save" when finished editing.


Edit gift-in-kind
* Contributor
Sort by number
Belton, Troy and Kira (103)
Save
* Date
3/16/2021
Close
Note
* Description
Couch for the Youth Group
Count towards fulfilling a pledge
* Pledge
* Towards pledge
$0.00
The donor, not the church, is responsible for determining and substantiating the value of a Gift-in-kind for tax-reporting purposes.
The "towards pledge amount is strictly for internal use; it allows a church to apply non-monetary gifts towards the fulfillment of a pledge.

Delete Contributor

When contributors are no longer being used, they are set to be “Skipped” and they get assigned an envelope number in the 10,000 range.

It’s recommended that you leave these contributors there as this will keep this contributor’s history in the database.

However, if you wish to delete contributors the time to do it is at the first of the year after you have verified your data, printed contribution statements, and made your year-end backups. Shepherd's Staff will not let you delete a contributor who has an active pledge or offerings in your current fiscal year.

When you delete a contributor, Shepherd's Staff will let you choose to delete the offering records of the contributor you're deleting, or convert the offering records to be listed under "Anonymous."

It's our recommendation that you print out a contribution statement that would include all of a contributor's offerings before you delete their record so you have a paper copy of their offerings.

1. Before you delete a contributor, make sure that you make a backup of your data. Once a contributor has been deleted, they cannot be brought back unless you restore a backup from before they were deleted.
2. Open the Contributions module, and click on Giving and choose "Contributors"
3. Find the contributor you wish to delete, click on them once to highlight their record, and click "Delete" at the bottom of the grid.
4. If this contributor is eligible to be deleted, the "Delete a contributor" window will appear with two options.
5. The first option "Delete the contributor record for *contributor name*" is to delete the selected contributor, check this box. The second box "Preserve this contributor's giving by reassigning it to "Anonymous"" if checked will keep this contributor's offerings in your records, but reassign them to the "Anonymous" giver.

Delete a contributor (BACKUP RECOMMENDED)... Cancel

☐ Delete contributor record for Stewart, Tammy

☐ Preserve this contributor's giving by reassigning it to "Anonymous"

Continue

Editing a Posted Batch

When a batch is posted, it creates offering records, but the batch itself is no longer something that you can edit as a batch anymore (except for the date of the batch itself, which can be edited by using the "Fix a Batch Posted to the Wrong Date" utility). However, this doesn't mean that you cannot make changes to the offering records that the batch created.

Bear in mind that making changes to offering records will not affect any deposits that were created by the posting of the batch that they were a part of, and it will not make any changes to an attendance batch that was created as a result of posting the batch. If any of the changes you make to the offering records would change either a deposit or an attendance batch, that information will need to be updated in the Finance and Attendance modules respectively.

To make changes to this "Batch" of offerings, we're going to find the offering records in our Offering records grid.

1. Open the Contributions module and under Giving, select "Offerings."
2. To find just the offerings for a particular day, in the first "Search" box, type in the date of the batch in MM/DD/YYYY format (For example, 11/19/2021) and press enter on your keyboard.
3. This will pull up only the offerings that were posted for that particular day.
4. Highlight the offering record you need to make changes to by clicking on it, and then click "Edit" at the bottom of the grid.
5. Make any needed changes to this offering record and click "Save" when finished.
6. Repeat steps 4 and 5 until you've made all the changes you need to make.

Search 1/3/2021 and

☑ Last 24 months

Filter (no filter) Who (all envelopes)

Envelope	Name	Date	Fund no.	Fund	Amount	Pledge?	Nor
101	Abbott, Dave and Sue	1/3/2021	1	General Fund	$315.00	☑	
172	Alexander, David and Sh...	1/3/2021	1	General Fund	$100.00	☑	
102	Baxter, Sally	1/3/2021	1	General Fund	$35.00	☑	
103	Belton, Troy and Kira	1/3/2021	1	General Fund	$40.00	☑	
104	Benedict, Tim	1/3/2021	1	General Fund	$50.00	☑	
106	Brown, Howard	1/3/2021	1	General Fund	$70.00	☑	
107	Callaway, Rob	1/3/2021	6	Education	$25.00	☑	
107	Callaway, Rob	1/3/2021	1	General Fund	$190.00	☑	
110	Chung, Brian and Molly	1/3/2021	4	Building Fund	$20.00	☑	
110	Chung, Brian and Molly	1/3/2021	1	General Fund	$95.00	☑	
112	Collins, James and Erin	1/3/2021	1	General Fund	$315.00	☑	
115	Dean, Art and Virginia	1/3/2021	1	General Fund	$50.00	☑	
116	Dowling, Arlene	1/3/2021	1	General Fund	$20.00	☑	
118	Fernandez, Lou and Pam	1/3/2021	1	General Fund	$235.00	☑	
119	Freeman, Jason	1/3/2021	1	General Fund	$25.00	☑	
120	Gibson, Jon and Melissa	1/3/2021	1	General Fund	$200.00	☑	
121	Gomez, Edgar and Anita	1/3/2021	1	General Fund	$410.00	☑	

Add Edit Copy Delete Subgroup Export Print Save 66

Deaths

When the death of a contributor happens, the criteria that affects the process going forward depends on whether or not there is a surviving spouse.

If there is a surviving spouse, we will want to set the envelope up so that the surviving spouse keeps all the current offering records and still receives envelopes the next year. If there is no surviving spouse, we will want to make sure that the contributor record does not receive envelopes the next year.

Regardless of which situation you find yourself in, there are two things you will want to do prior to starting. You need to make a backup of your database as well as print a contribution statement for this envelope.

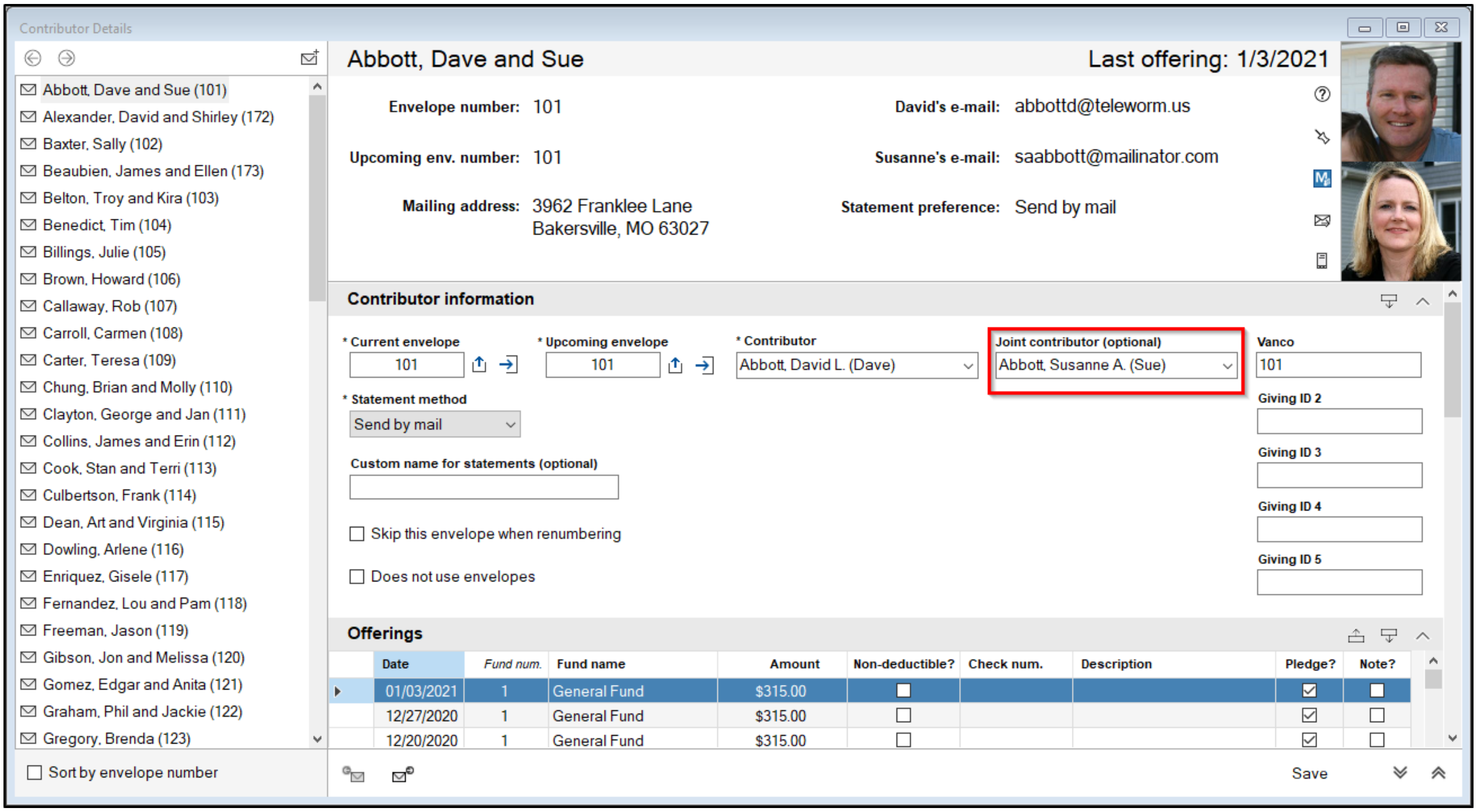
Important: We recommend not deleting any records until after the year has ended.

» Surviving Spouse

1. In the Contributions module, click on Giving and then choose "Contributors"
2. Highlight the record you need to update and click "Edit"
3. In the Contributor information section, click into the "Joint contributor" field and then press the Delete key on your keyboard. This will remove the joint contributor from the envelope.
4. If the surviving spouse was the joint contributor, in the "Contributor" field, make sure they are selected.
5. Click "Save" at the bottom right-hand corner of the grid to save your changes.

» No Surviving Spouse

1. In the Contributions module, click on Giving and then choose "Contributors"
2. Highlight the record you need to update and click "Edit"
3. Check the "Skip this envelope when renumbering." box. If your church doesn't do an envelope renumbering at the end of the year, you'll also want to update this contributor's envelope number to be in the 10,000 range of envelopes by updating the Current Envelope and Upcoming envelope fields with this number.
4. Click "Save" at the bottom right-hand corner of the grid to save your changes.



Contributor Details
Abbott, Dave and Sue (101)
Alexander, David and Shirley (172)
Baxter, Sally (102)
Beaubien, James and Ellen (173)
Belton, Troy and Kira (103)
Benedict, Tim (104)
Billings, Julie (105)
Brown, Howard (106)
Callaway, Rob (107)
Carroll, Carmen (108)
Carter, Teresa (109)
Chung, Brian and Molly (110)
Clayton, George and Jan (111)
Collins, James and Erin (112)
Cook, Stan and Terri (113)
Culbertson, Frank (114)
Dean, Art and Virginia (115)
Dowling, Arlene (116)
Enriquez, Gisele (117)
Fernandez, Lou and Pam (118)
Freeman, Jason (119)
Gibson, Jon and Melissa (120)
Gomez, Edgar and Anita (121)
Graham, Phil and Jackie (122)
Gregory, Brenda (123)
Sort by envelope number
Abbott, Dave and Sue
Last offering: 1/3/2021
Envelope number: 101
Upcoming env. number: 101
Mailing address: 3962 Franklee Lane
Bakersville, MO 63027
David's e-mail: abbottd@teleworm.us
Susanne's e-mail: saabbott@mailinator.com
Statement preference: Send by mail
Contributor information
* Current envelope
101
* Upcoming envelope
101
* Contributor
Abbott, David L. (Dave)
Joint contributor (optional)
Abbott, Susanne A. (Sue)
Vanco
101
* Statement method
Send by mail
Giving ID 2
Custom name for statements (optional)
Giving ID 3
Skip this envelope when renumbering
Giving ID 4
Does not use envelopes
Giving ID 5
Offerings
Date
Fund num.
Fund name
Amount
Non-deductible?
Check num.
Description
Pledge?
Note?
01/03/2021 1 General Fund $315.00
12/27/2020 1 General Fund $315.00
12/20/2020 1 General Fund $315.00
Save

Divorce (or Separation)

In divorce situations, communication with the Contributors is important. Often one of the Contributors leaves the church. Other times, both Contributors stay at the church but with different Envelope Numbers.

In cases where both are staying, offerings then get divided or go to one or the other Contributor. Decisions on “who gets what” Offerings should be made with the contributors’ input. You may need to go back and edit previous offerings if both contributors are going to be staying at the church.

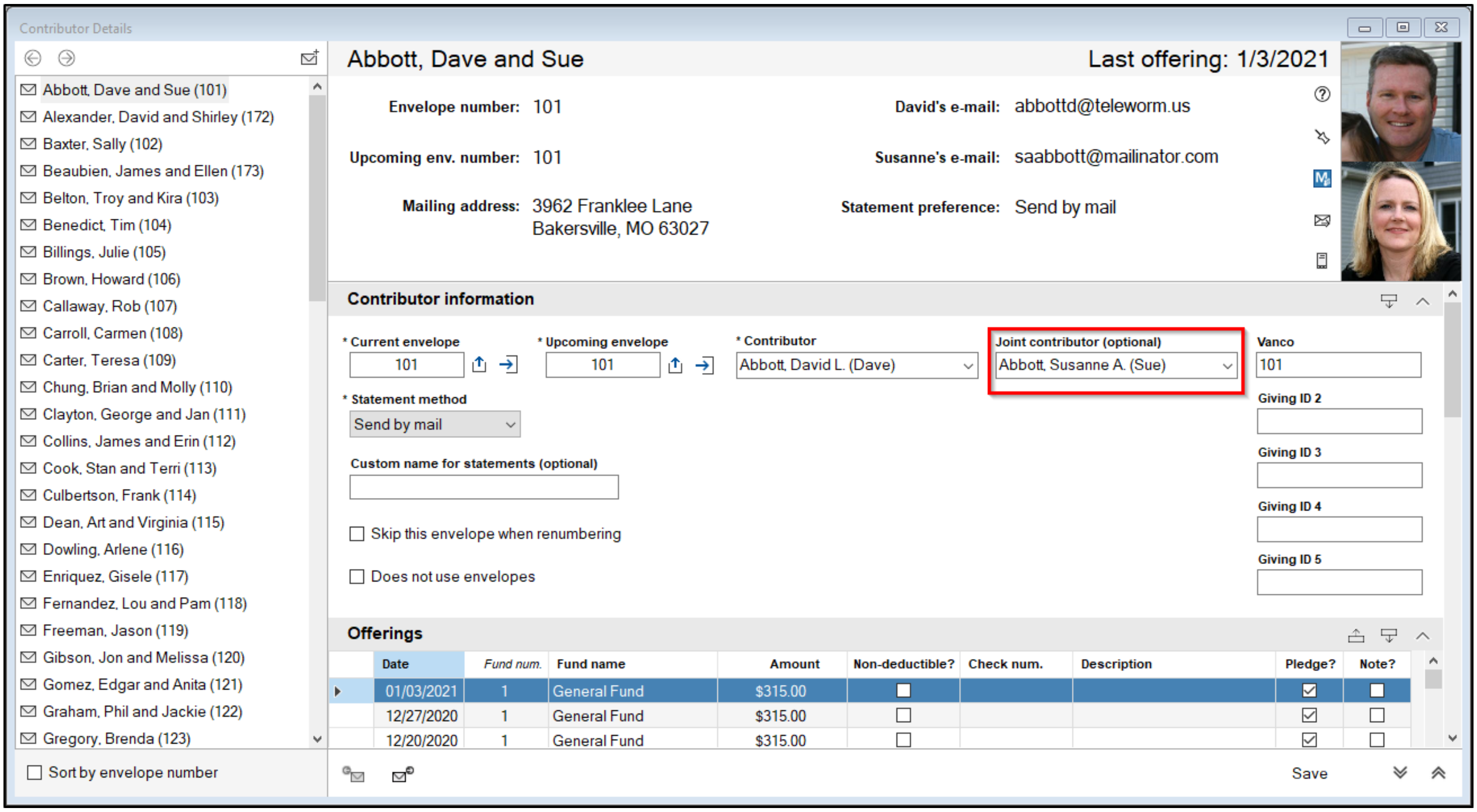
With that in mind, it’s recommended that you print contribution statements prior to these steps so there is a record of the joint giving.

One Contributor is Leaving the Church

1. Open the Contributions module, click on Giving and then click "Contributors"
2. Find the Contributor Record that you need to edit.
3. In the Contributor information section, click into the "Joint contributor" field and then press the Delete key on your keyboard. This will remove the joint contributor from the envelope.
4. If the Contributor who is staying at the church was the Joint contributor, make sure they are now listed as the contributor in the "Contributor" field.
5. Click Save at the bottom right-hand corner of the window.

Both Contributors are Staying at the Church

1. Follow the steps above first to remove the contributor who will not be keeping the envelope number.
2. Click "Add" on the Contributor's grid to add a new envelope
3. Fill out the new envelope with the information for the contributor that you removed from the divorced couple's envelope.
4. After you've added the envelope for the contributor who is on the new envelope number, you'll want to find out how the couple wants to split up the giving. Once you find this out, you'll want to edit the offering records accordingly.



Contributor Details
Abbott, Dave and Sue (101)
Alexander, David and Shirley (172)
Baxter, Sally (102)
Beaubien, James and Ellen (173)
Belton, Troy and Kira (103)
Benedict, Tim (104)
Billings, Julie (105)
Brown, Howard (106)
Callaway, Rob (107)
Carroll, Carmen (108)
Carter, Teresa (109)
Chung, Brian and Molly (110)
Clayton, George and Jan (111)
Collins, James and Erin (112)
Cook, Stan and Terri (113)
Culbertson, Frank (114)
Dean, Art and Virginia (115)
Dowling, Arlene (116)
Enriquez, Gisele (117)
Fernandez, Lou and Pam (118)
Freeman, Jason (119)
Gibson, Jon and Melissa (120)
Gomez, Edgar and Anita (121)
Graham, Phil and Jackie (122)
Gregory, Brenda (123)
Sort by envelope number
Abbott, Dave and Sue
Last offering: 1/3/2021
Envelope number: 101
David's e-mail: abbottd@teleworm.us
Upcoming env. number: 101
Susanne's e-mail: saabbott@mailinator.com
Mailing address: 3962 Franklee Lane
Bakersville, MO 63027
Statement preference: Send by mail
Contributor information
* Current envelope
101
* Upcoming envelope
101
* Contributor
Abbott, David L. (Dave)
Joint contributor (optional)
Abbott, Susanne A. (Sue)
Vanco
101
* Statement method
Send by mail
Giving ID 2
Custom name for statements (optional)
Giving ID 3
Skip this envelope when renumbering
Giving ID 4
Does not use envelopes
Giving ID 5
Offerings
Date
Fund num.
Fund name
Amount
Non-deductible?
Check num.
Description
Pledge?
Note?
01/03/2021 1 General Fund $315.00
12/27/2020 1 General Fund $315.00
12/20/2020 1 General Fund $315.00
Save

Handling Marriages

When a couple gets married, that couple must decide if they want their year-end statements that year to include both of their names or if they just want to stay separate for the rest of the year.

If they want them to stay separate, you won't make these changes until after you have printed the year-end contribution statements.

If they want to combine offerings for the current year, you can make the following changes immediately. There are a couple of preliminary steps you want to take prior to starting this process.

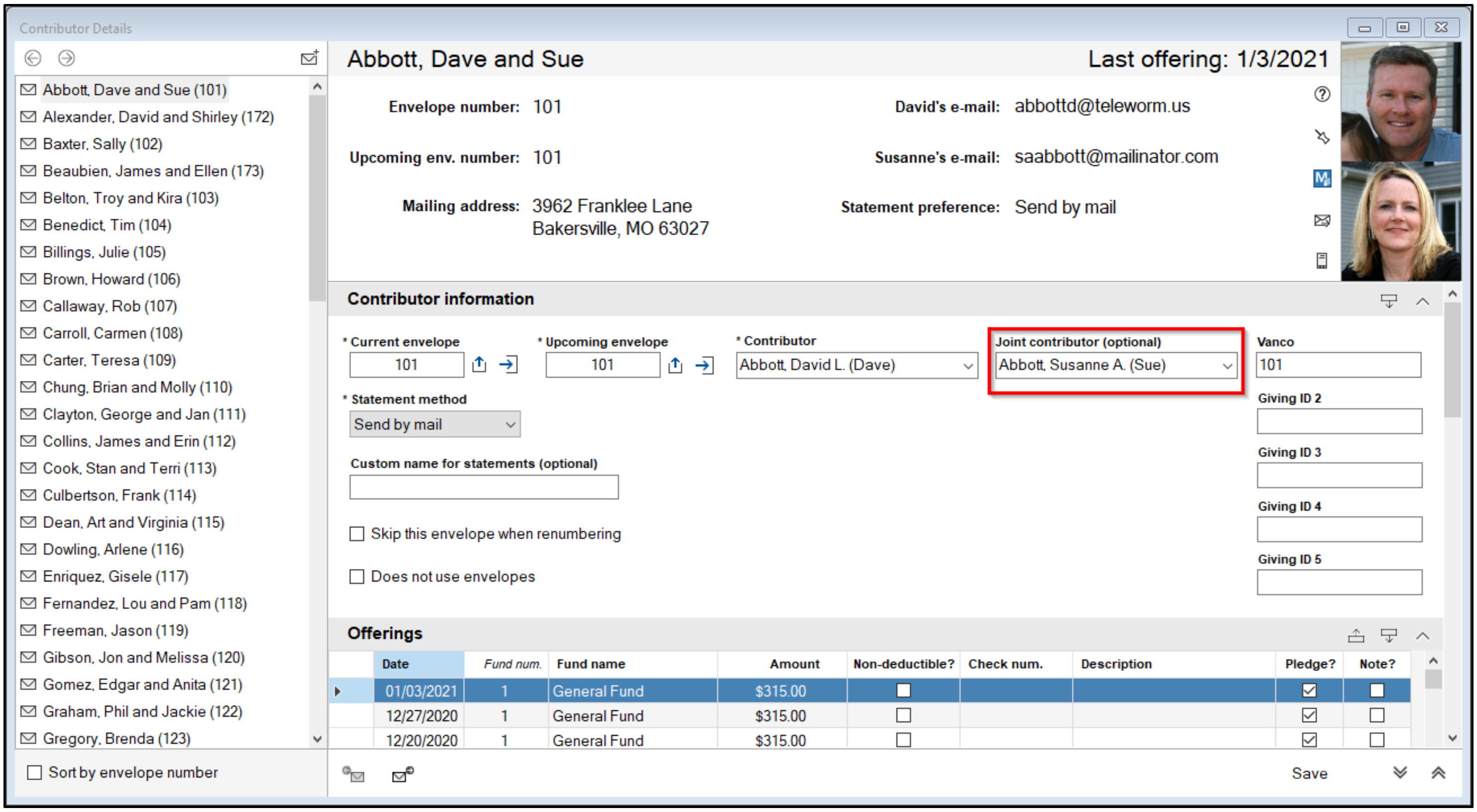
The first step you want to take is creating a backup of your database. For instructions on this see "Backing up Your Database"

The second step is to print out contribution statements for each member of the couple that currently has an envelope. This is so they have a copy of which offerings were theirs prior to combining them on the same envelope. You might consider printing out a copy for the church's records as well.

The next steps will depend on whether each member of the couple currently has an envelope or if they both have envelopes.

If only one Member has an Envelope:

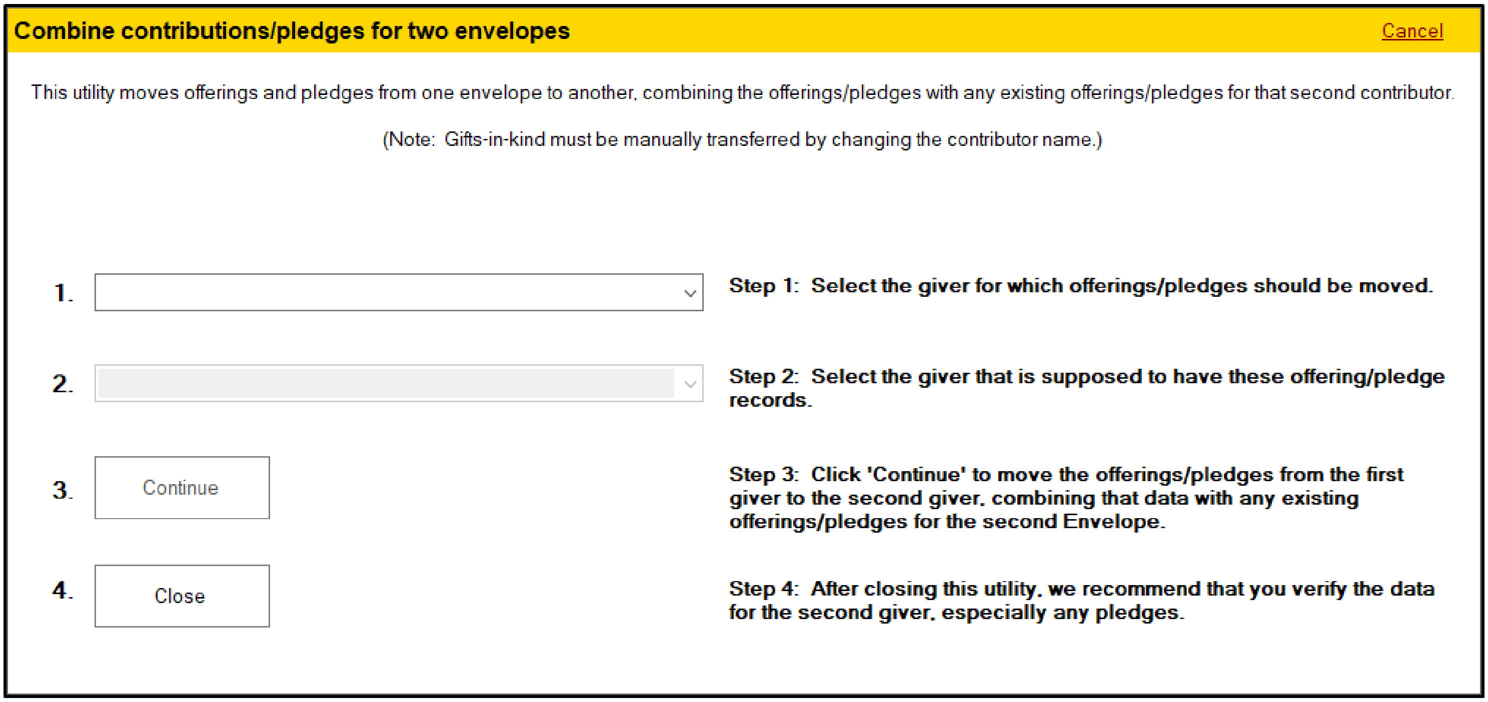
1. Open the Contributions module, click on Giving, and then click "Contributors".
2. Find the contributor who currently has the envelope on their own. Click on it to highlight that contributor and then click "Edit"
3. In the window that appears, in the Contributor information section, select the spouse who will be added to the envelope in the "Joint contributor" field. Note that you can only add a person who is in the same household as the person in the "Contributor" field as a joint contributor.
4. Click Save at the bottom right corner of the window to confirm your changes.



Both Members Have Envelopes:

1. In the Contributions module, click on Tools/Settings, and under Data tools, select "Combine Contributions for two envelopes"
2. Confirm that you've made a backup in the window that appears. If you haven't made a backup, click the "Make backup" button and create a backup of your data. Once this is done, or if you already had a backup, click "Yes"
3. In the window that appears, in the first step, select the envelope that you're not going to be keeping for the couple. The envelope you select in this field will have all offerings and pledges removed from it.
4. In the second step, you'll select the envelope for the other member of the couple. This is where all the offerings and pledges from the envelope you picked in step one will be placed.
5. Click Continue to start the process of moving the offerings and pledges from the envelope in step one to the envelope in step two.
6. Click close and this will close the "Combine contributions for two envelopes" utility.
7. The next thing that needs to be done is to delete the envelope we removed all the offerings and pledges from. To do this, click on Giving and select "Contributors"
8. Find the envelope that you removed all the offerings from, click on it to highlight it, and then click "Delete" to delete the envelope.

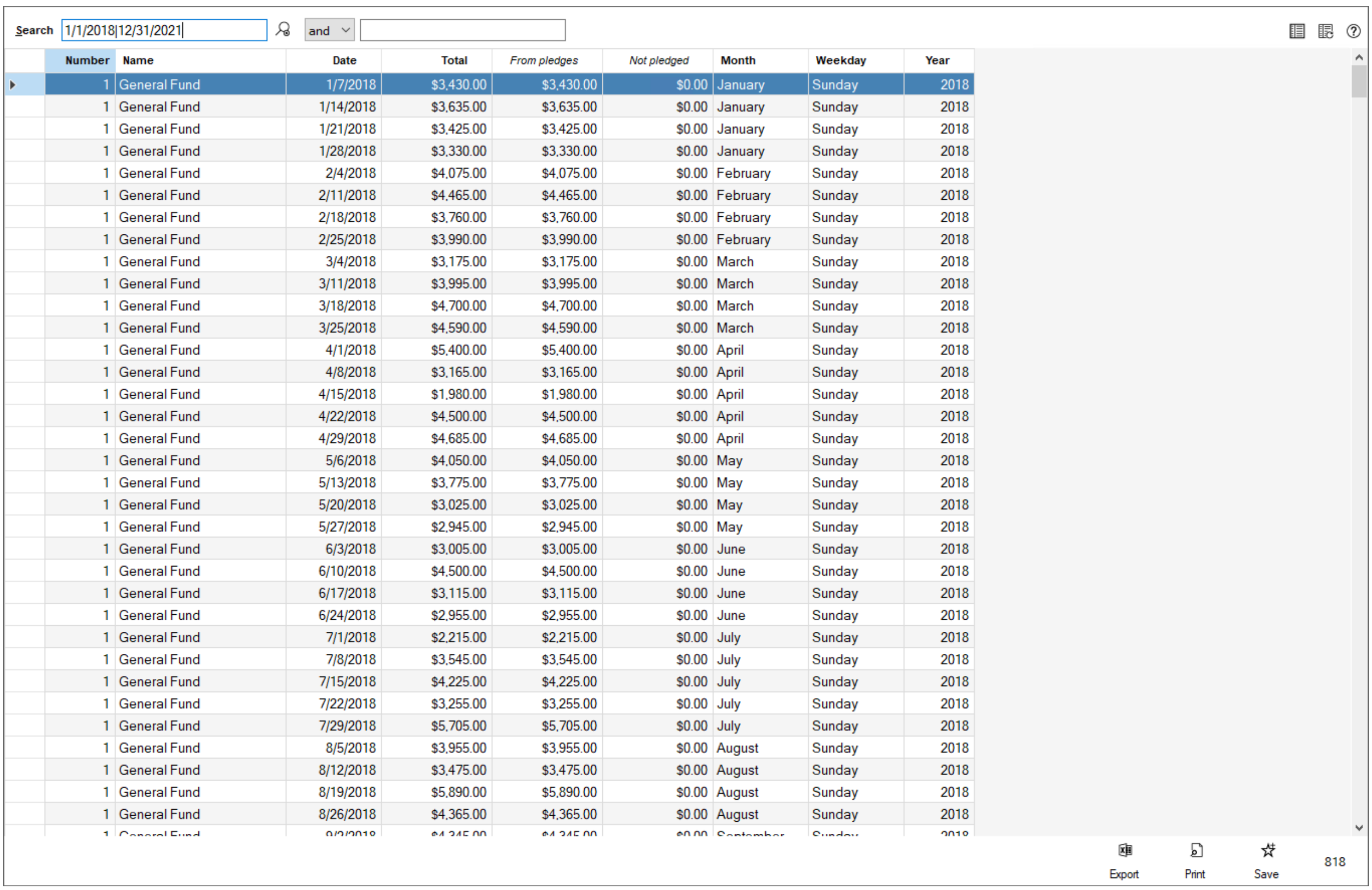
9. In the window that appears check the box for "Delete contributor record for *Contributor Name*" and then click "Continue" and confirm the deletion of this contributor record.
10. Back on the Contributor grid, find the envelope where you moved all the offerings. Click on it to highlight it, and then click "Edit"
11. In the window that appears, in the "Joint contributor" field, select the contributor's spouse.
12. Click the "Save" button in the bottom right corner of the window to save your changes.



Sum by fund, day

The Sum by fund, day view is a view that will show you each day that you received contributions for a particular fund. This view will show you the total that you received to this fund, how much was pledged, how much was unpledged, and what day of the week contributions were made to the fund.

1. You can access the Sum by fund, day view by opening the contributions module, clicking on Summaries, and then clicking "By fund, day"
2. You can search for particular entries or filter to a particular date range by using the search boxes at the top of the grid. See our article on search and filter for more details on how to use these search boxes.
3. Clicking print will provide you with a variety of reporting options, including the view as you see it in the grid, totals by fund, totals by fund, month, and many others.

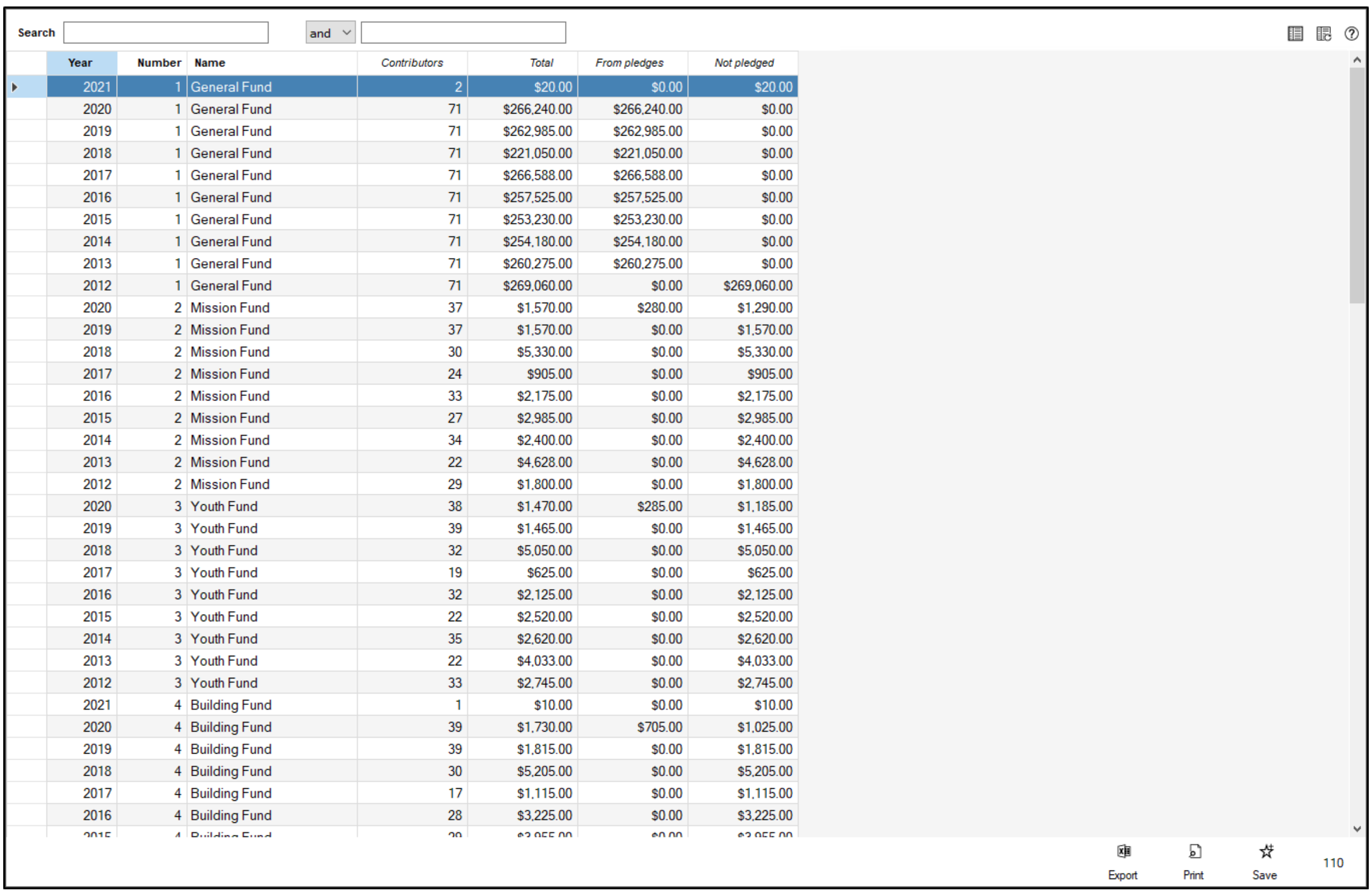


Number	Name	Date	Total	From pledges	Not pledged	Month	Weekday	Year
1	General Fund	1/7/2018	$3,430.00	$3,430.00	$0.00	January	Sunday	2018
1	General Fund	1/14/2018	$3,635.00	$3,635.00	$0.00	January	Sunday	2018
1	General Fund	1/21/2018	$3,425.00	$3,425.00	$0.00	January	Sunday	2018
1	General Fund	1/28/2018	$3,330.00	$3,330.00	$0.00	January	Sunday	2018
1	General Fund	2/4/2018	$4,075.00	$4,075.00	$0.00	February	Sunday	2018
1	General Fund	2/11/2018	$4,465.00	$4,465.00	$0.00	February	Sunday	2018
1	General Fund	2/18/2018	$3,760.00	$3,760.00	$0.00	February	Sunday	2018
1	General Fund	2/25/2018	$3,990.00	$3,990.00	$0.00	February	Sunday	2018
1	General Fund	3/4/2018	$3,175.00	$3,175.00	$0.00	March	Sunday	2018
1	General Fund	3/11/2018	$3,995.00	$3,995.00	$0.00	March	Sunday	2018
1	General Fund	3/18/2018	$4,700.00	$4,700.00	$0.00	March	Sunday	2018
1	General Fund	3/25/2018	$4,590.00	$4,590.00	$0.00	March	Sunday	2018
1	General Fund	4/1/2018	$5,400.00	$5,400.00	$0.00	April	Sunday	2018
1	General Fund	4/8/2018	$3,165.00	$3,165.00	$0.00	April	Sunday	2018
1	General Fund	4/15/2018	$1,980.00	$1,980.00	$0.00	April	Sunday	2018
1	General Fund	4/22/2018	$4,500.00	$4,500.00	$0.00	April	Sunday	2018
1	General Fund	4/29/2018	$4,685.00	$4,685.00	$0.00	April	Sunday	2018
1	General Fund	5/6/2018	$4,050.00	$4,050.00	$0.00	May	Sunday	2018
1	General Fund	5/13/2018	$3,775.00	$3,775.00	$0.00	May	Sunday	2018
1	General Fund	5/20/2018	$3,025.00	$3,025.00	$0.00	May	Sunday	2018
1	General Fund	5/27/2018	$2,945.00	$2,945.00	$0.00	May	Sunday	2018
1	General Fund	6/3/2018	$3,005.00	$3,005.00	$0.00	June	Sunday	2018
1	General Fund	6/10/2018	$4,500.00	$4,500.00	$0.00	June	Sunday	2018
1	General Fund	6/17/2018	$3,115.00	$3,115.00	$0.00	June	Sunday	2018
1	General Fund	6/24/2018	$2,955.00	$2,955.00	$0.00	June	Sunday	2018
1	General Fund	7/1/2018	$2,215.00	$2,215.00	$0.00	July	Sunday	2018
1	General Fund	7/8/2018	$3,545.00	$3,545.00	$0.00	July	Sunday	2018
1	General Fund	7/15/2018	$4,225.00	$4,225.00	$0.00	July	Sunday	2018
1	General Fund	7/22/2018	$3,255.00	$3,255.00	$0.00	July	Sunday	2018
1	General Fund	7/29/2018	$5,705.00	$5,705.00	$0.00	July	Sunday	2018
1	General Fund	8/5/2018	$3,955.00	$3,955.00	$0.00	August	Sunday	2018
1	General Fund	8/12/2018	$3,475.00	$3,475.00	$0.00	August	Sunday	2018
1	General Fund	8/19/2018	$5,890.00	$5,890.00	$0.00	August	Sunday	2018
1	General Fund	8/26/2018	$4,365.00	$4,365.00	$0.00	August	Sunday	2018

Sum by fund, year

The Sum by fund, year view is a view that will show you total contributions to each fund for each year. The view will show the year, the fund, the number of contributors you had to that fund during that year, the total you received to this fund, and how much of it was pledged, and how much of it was unpledged.

1. You can access the Sum by fund, year view by opening the contributions module, clicking on Summaries, and then clicking "By fund, year"
2. You can search for particular entries or filter to a particular date range by using the search boxes at the top of the grid. See our article on search and filter for more details on how to use these search boxes.
3. Clicking print will provide you with a variety of reporting options, including the view as you see it on the grid, a report that shows the information grouped by fund, then year, and a report grouped by year, then fund.

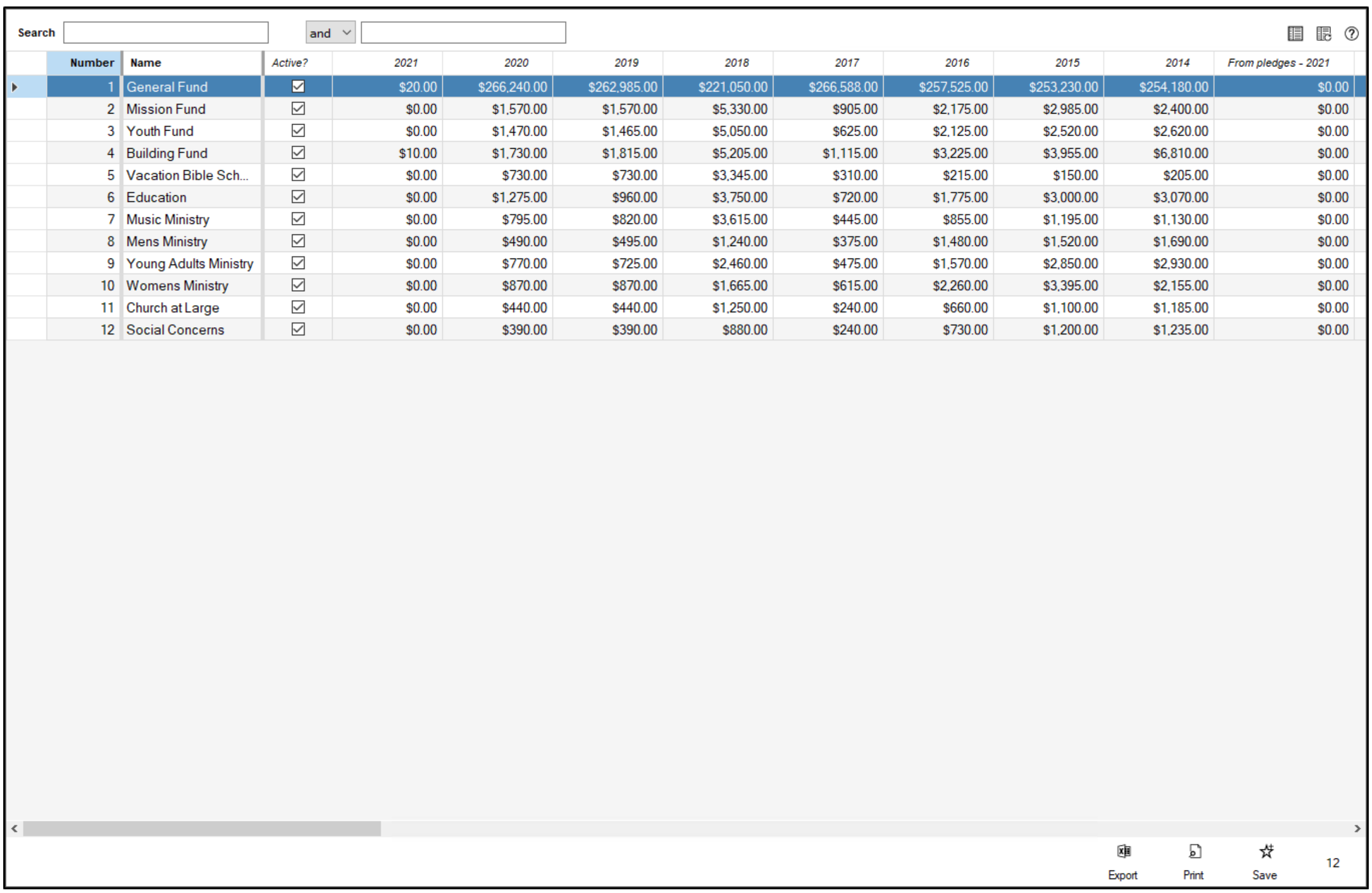


Year	Number	Name	Contributors	Total	From pledges	Not pledged
2021	1	General Fund	2	$20.00	$0.00	$20.00
2020	1	General Fund	71	$266,240.00	$266,240.00	$0.00
2019	1	General Fund	71	$262,985.00	$262,985.00	$0.00
2018	1	General Fund	71	$221,050.00	$221,050.00	$0.00
2017	1	General Fund	71	$266,588.00	$266,588.00	$0.00
2016	1	General Fund	71	$257,525.00	$257,525.00	$0.00
2015	1	General Fund	71	$253,230.00	$253,230.00	$0.00
2014	1	General Fund	71	$254,180.00	$254,180.00	$0.00
2013	1	General Fund	71	$260,275.00	$260,275.00	$0.00
2012	1	General Fund	71	$269,060.00	$0.00	$269,060.00
2020	2	Mission Fund	37	$1,570.00	$280.00	$1,290.00
2019	2	Mission Fund	37	$1,570.00	$0.00	$1,570.00
2018	2	Mission Fund	30	$5,330.00	$0.00	$5,330.00
2017	2	Mission Fund	24	$905.00	$0.00	$905.00
2016	2	Mission Fund	33	$2,175.00	$0.00	$2,175.00
2015	2	Mission Fund	27	$2,985.00	$0.00	$2,985.00
2014	2	Mission Fund	34	$2,400.00	$0.00	$2,400.00
2013	2	Mission Fund	22	$4,628.00	$0.00	$4,628.00
2012	2	Mission Fund	29	$1,800.00	$0.00	$1,800.00
2020	3	Youth Fund	38	$1,470.00	$285.00	$1,185.00
2019	3	Youth Fund	39	$1,465.00	$0.00	$1,465.00
2018	3	Youth Fund	32	$5,050.00	$0.00	$5,050.00
2017	3	Youth Fund	19	$625.00	$0.00	$625.00
2016	3	Youth Fund	32	$2,125.00	$0.00	$2,125.00
2015	3	Youth Fund	22	$2,520.00	$0.00	$2,520.00
2014	3	Youth Fund	35	$2,620.00	$0.00	$2,620.00
2013	3	Youth Fund	22	$4,033.00	$0.00	$4,033.00
2012	3	Youth Fund	33	$2,745.00	$0.00	$2,745.00
2021	4	Building Fund	1	$10.00	$0.00	$10.00
2020	4	Building Fund	39	$1,730.00	$705.00	$1,025.00
2019	4	Building Fund	39	$1,815.00	$0.00	$1,815.00
2018	4	Building Fund	30	$5,205.00	$0.00	$5,205.00
2017	4	Building Fund	17	$1,115.00	$0.00	$1,115.00
2016	4	Building Fund	28	$3,225.00	$0.00	$3,225.00
2015	4	Building Fund	[illegible]	$3,955.00	$0.00	$3,955.00

Sum by fund, year (across)

The Sum by fund, year (across) view shows similar information to the Sum by fund, year view, but instead of each year having its own row, each fund has its own row, and each year has its own column each row for giving total, the amount pledged amount that came from that year, the unpledged amount that came from that year, and the total number of givers for that year.

1. You can access the Sum by fund (across), day view by opening the contributions module, clicking on Summaries, and then clicking "By fund, day (across)"
2. You can search for particular funds by using the search boxes at the top of the grid. See our article on search and filter for more details on how to use these search boxes.
3. Clicking print will provide you with a report, grouped by fund that shows giving totals, pledged totals, unpledged totals, and the number of givers for each year, for each fund.



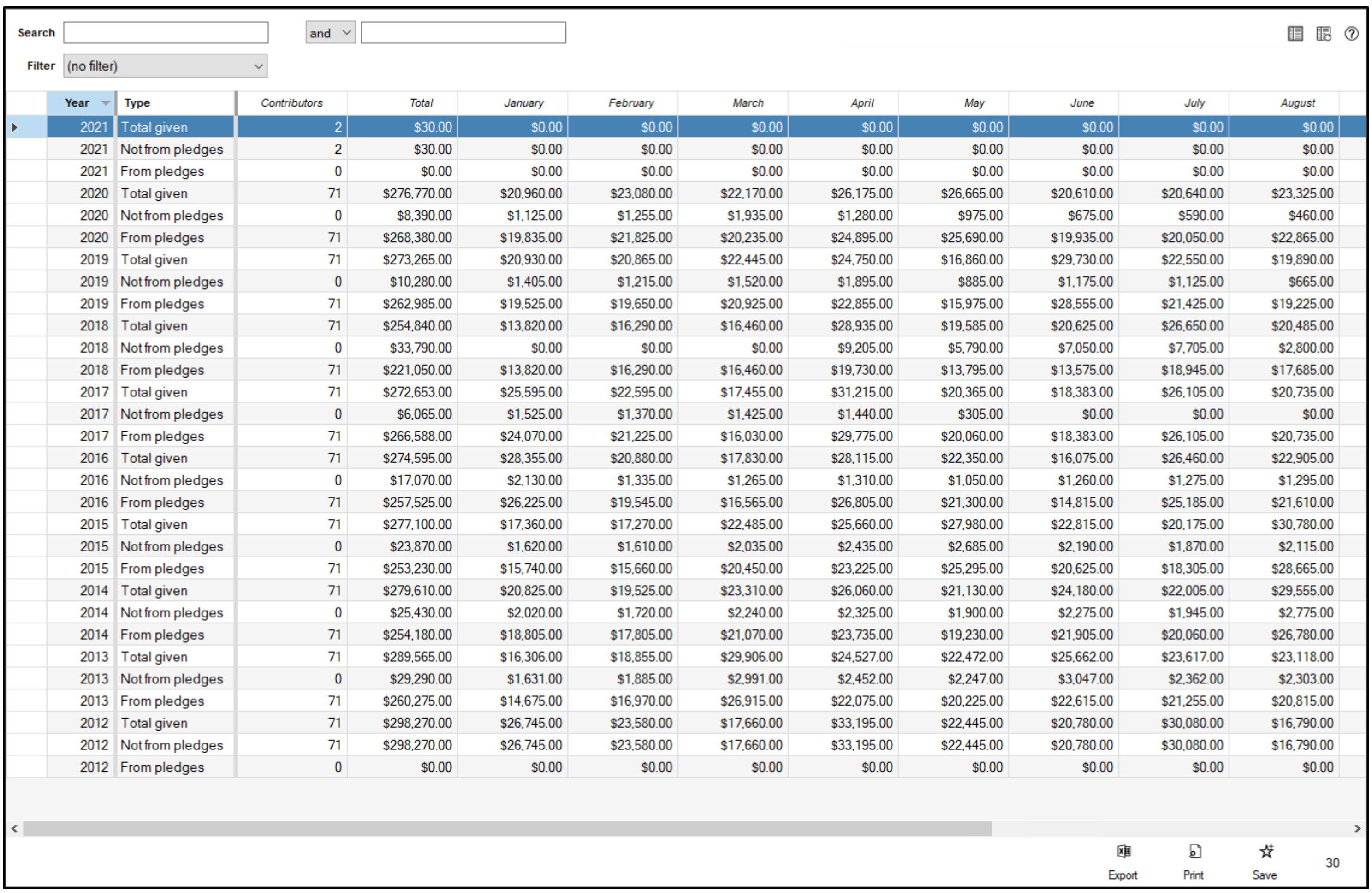
Number	Name	Active?	2021	2020	2019	2018	2017	2016	2015	2014	From pledges - 2021
1	General Fund	☑	$20.00	$266,240.00	$262,985.00	$221,050.00	$266,588.00	$257,525.00	$253,230.00	$254,180.00	$0.00
2	Mission Fund	☑	$0.00	$1,570.00	$1,570.00	$5,330.00	$905.00	$2,175.00	$2,985.00	$2,400.00	$0.00
3	Youth Fund	☑	$0.00	$1,470.00	$1,465.00	$5,050.00	$625.00	$2,125.00	$2,520.00	$2,620.00	$0.00
4	Building Fund	☑	$10.00	$1,730.00	$1,815.00	$5,205.00	$1,115.00	$3,225.00	$3,955.00	$6,810.00	$0.00
5	Vacation Bible Sch...	☑	$0.00	$730.00	$730.00	$3,345.00	$310.00	$215.00	$150.00	$205.00	$0.00
6	Education	☑	$0.00	$1,275.00	$960.00	$3,750.00	$720.00	$1,775.00	$3,000.00	$3,070.00	$0.00
7	Music Ministry	☑	$0.00	$795.00	$820.00	$3,615.00	$445.00	$855.00	$1,195.00	$1,130.00	$0.00
8	Mens Ministry	☑	$0.00	$490.00	$495.00	$1,240.00	$375.00	$1,480.00	$1,520.00	$1,690.00	$0.00
9	Young Adults Ministry	☑	$0.00	$770.00	$725.00	$2,460.00	$475.00	$1,570.00	$2,850.00	$2,930.00	$0.00
10	Womens Ministry	☑	$0.00	$870.00	$870.00	$1,665.00	$615.00	$2,260.00	$3,395.00	$2,155.00	$0.00
11	Church at Large	☑	$0.00	$440.00	$440.00	$1,250.00	$240.00	$660.00	$1,100.00	$1,185.00	$0.00
12	Social Concerns	☑	$0.00	$390.00	$390.00	$880.00	$240.00	$730.00	$1,200.00	$1,235.00	$0.00

› Summaries

Sum by year and month

The Sum by year and month view is a view that will show you contributions for each year, broken down by month. Each year has three rows of information, Total given, Not from pledges, and From pledges, and each row will show you the total number of contributors you had for that year in that category, the total for the year in that category, and the total per month in that category.

1. You can access the Sum by fund, day view by opening the contributions module, clicking on Summaries, and then clicking "By fund, day"
2. You can search for particular entries by using the search boxes at the top of the grid or filter to see only the Total given, Not from pledges or From pledges rows. See our article on search and filter for more details on how to use these search boxes and filtering options.
3. Clicking the print button will prepare a report grouped by year showing you Pledged, unpledged and overall totals.



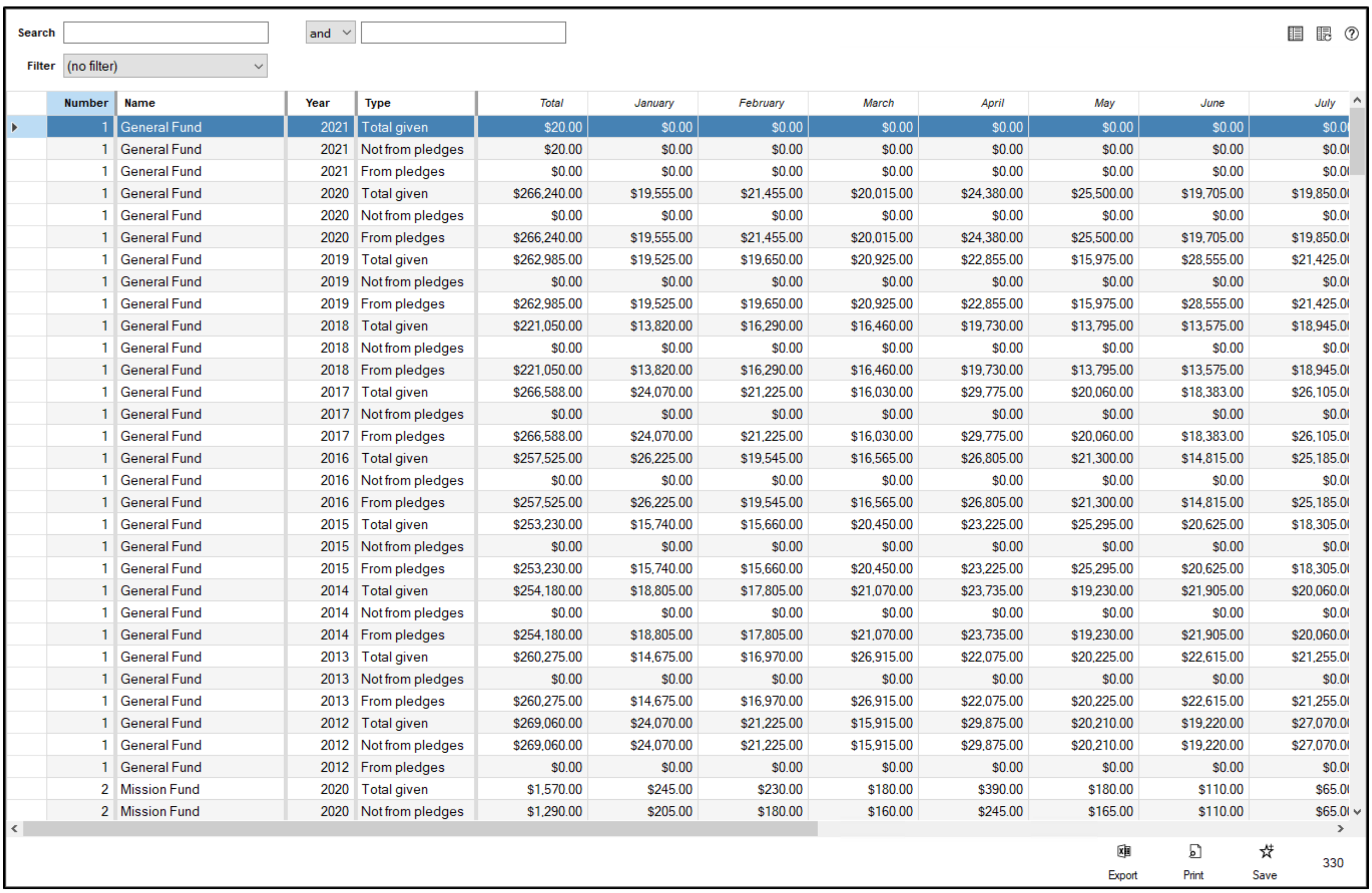
Year	Type	Contributors	Total	January	February	March	April	May	June	July	August
2021	Total given	2	$30.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
2021	Not from pledges	2	$30.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
2021	From pledges	0	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
2020	Total given	71	$276,770.00	$20,960.00	$23,080.00	$22,170.00	$26,175.00	$26,665.00	$20,610.00	$20,640.00	$23,325.00
2020	Not from pledges	0	$8,390.00	$1,125.00	$1,255.00	$1,935.00	$1,280.00	$975.00	$675.00	$590.00	$460.00
2020	From pledges	71	$268,380.00	$19,835.00	$21,825.00	$20,235.00	$24,895.00	$25,690.00	$19,935.00	$20,050.00	$22,865.00
2019	Total given	71	$273,265.00	$20,930.00	$20,865.00	$22,445.00	$24,750.00	$16,860.00	$29,730.00	$22,550.00	$19,890.00
2019	Not from pledges	0	$10,280.00	$1,405.00	$1,215.00	$1,520.00	$1,895.00	$885.00	$1,175.00	$1,125.00	$665.00
2019	From pledges	71	$262,985.00	$19,525.00	$19,650.00	$20,925.00	$22,855.00	$15,975.00	$28,555.00	$21,425.00	$19,225.00
2018	Total given	71	$254,840.00	$13,820.00	$16,290.00	$16,460.00	$28,935.00	$19,585.00	$20,625.00	$26,650.00	$20,485.00
2018	Not from pledges	0	$33,790.00	$0.00	$0.00	$0.00	$9,205.00	$5,790.00	$7,050.00	$7,705.00	$2,800.00
2018	From pledges	71	$221,050.00	$13,820.00	$16,290.00	$16,460.00	$19,730.00	$13,795.00	$13,575.00	$18,945.00	$17,685.00
2017	Total given	71	$272,653.00	$25,595.00	$22,595.00	$17,455.00	$31,215.00	$20,365.00	$18,383.00	$26,105.00	$20,735.00
2017	Not from pledges	0	$6,065.00	$1,525.00	$1,370.00	$1,425.00	$1,440.00	$305.00	$0.00	$0.00	$0.00
2017	From pledges	71	$266,588.00	$24,070.00	$21,225.00	$16,030.00	$29,775.00	$20,060.00	$18,383.00	$26,105.00	$20,735.00
2016	Total given	71	$274,595.00	$28,355.00	$20,880.00	$17,830.00	$28,115.00	$22,350.00	$16,075.00	$26,460.00	$22,905.00
2016	Not from pledges	0	$17,070.00	$2,130.00	$1,335.00	$1,265.00	$1,310.00	$1,050.00	$1,260.00	$1,275.00	$1,295.00
2016	From pledges	71	$257,525.00	$26,225.00	$19,545.00	$16,565.00	$26,805.00	$21,300.00	$14,815.00	$25,185.00	$21,610.00
2015	Total given	71	$277,100.00	$17,360.00	$17,270.00	$22,485.00	$25,660.00	$27,980.00	$22,815.00	$20,175.00	$30,780.00
2015	Not from pledges	0	$23,870.00	$1,620.00	$1,610.00	$2,035.00	$2,435.00	$2,685.00	$2,190.00	$1,870.00	$2,115.00
2015	From pledges	71	$253,230.00	$15,740.00	$15,660.00	$20,450.00	$23,225.00	$25,295.00	$20,625.00	$18,305.00	$28,665.00
2014	Total given	71	$279,610.00	$20,825.00	$19,525.00	$23,310.00	$26,060.00	$21,130.00	$24,180.00	$22,005.00	$29,555.00
2014	Not from pledges	0	$25,430.00	$2,020.00	$1,720.00	$2,240.00	$2,325.00	$1,900.00	$2,275.00	$1,945.00	$2,775.00
2014	From pledges	71	$254,180.00	$18,805.00	$17,805.00	$21,070.00	$23,735.00	$19,230.00	$21,905.00	$20,060.00	$26,780.00
2013	Total given	71	$289,565.00	$16,306.00	$18,855.00	$29,906.00	$24,527.00	$22,472.00	$25,662.00	$23,617.00	$23,118.00
2013	Not from pledges	0	$29,290.00	$1,631.00	$1,885.00	$2,991.00	$2,452.00	$2,247.00	$3,047.00	$2,362.00	$2,303.00
2013	From pledges	71	$260,275.00	$14,675.00	$16,970.00	$26,915.00	$22,075.00	$20,225.00	$22,615.00	$21,255.00	$20,815.00
2012	Total given	71	$298,270.00	$26,745.00	$23,580.00	$17,660.00	$33,195.00	$22,445.00	$20,780.00	$30,080.00	$16,790.00
2012	Not from pledges	71	$298,270.00	$26,745.00	$23,580.00	$17,660.00	$33,195.00	$22,445.00	$20,780.00	$30,080.00	$16,790.00
2012	From pledges	0	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

› Summaries

Sum by fund, year, month

The Sum by fund, year, month view is a view that will show you contribution totals broken out by fund, for each year, and then showing you totals for each month within that year. Each year is broken into three rows: Total given, Not from Pledges, From Pledges.

1. You can access the Sum by fund, year, month view by opening the contributions module, clicking on Summaries, and then clicking "By fund, year, month"
2. You can search for particular funds or years by using the search boxes at the top of the grid. The filter box will allow you to filter to just see one of the rows for each year as well. See our article on search and filter for more details on how to use the search and filter function of this grid.
3. Clicking print will provide you with two options. The (default) option will show you a report, grouped by fund, showing you Pledged, unpledged and totals for each year, broken out by month for each fund. The "Fund totals only" option will show you a report, grouped by fund, showing you only the totals for each year, broken out by month.

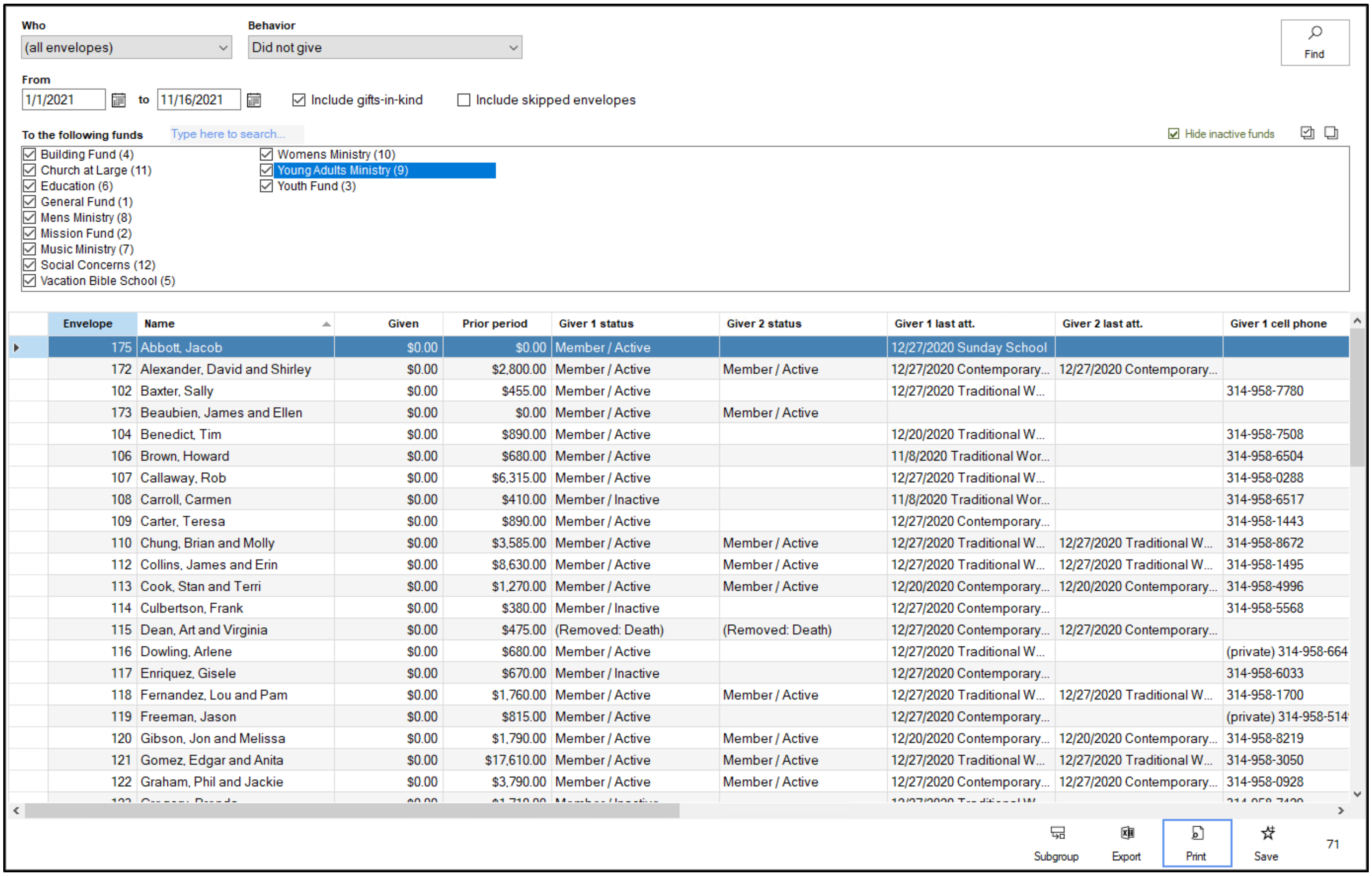


Number	Name	Year	Type	Total	January	February	March	April	May	June	July
1	General Fund	2021	Total given	$20.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
1	General Fund	2021	Not from pledges	$20.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
1	General Fund	2021	From pledges	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
1	General Fund	2020	Total given	$266,240.00	$19,555.00	$21,455.00	$20,015.00	$24,380.00	$25,500.00	$19,705.00	$19,850.0
1	General Fund	2020	Not from pledges	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
1	General Fund	2020	From pledges	$266,240.00	$19,555.00	$21,455.00	$20,015.00	$24,380.00	$25,500.00	$19,705.00	$19,850.0
1	General Fund	2019	Total given	$262,985.00	$19,525.00	$19,650.00	$20,925.00	$22,855.00	$15,975.00	$28,555.00	$21,425.0
1	General Fund	2019	Not from pledges	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
1	General Fund	2019	From pledges	$262,985.00	$19,525.00	$19,650.00	$20,925.00	$22,855.00	$15,975.00	$28,555.00	$21,425.0
1	General Fund	2018	Total given	$221,050.00	$13,820.00	$16,290.00	$16,460.00	$19,730.00	$13,795.00	$13,575.00	$18,945.0
1	General Fund	2018	Not from pledges	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
1	General Fund	2018	From pledges	$221,050.00	$13,820.00	$16,290.00	$16,460.00	$19,730.00	$13,795.00	$13,575.00	$18,945.0
1	General Fund	2017	Total given	$266,588.00	$24,070.00	$21,225.00	$16,030.00	$29,775.00	$20,060.00	$18,383.00	$26,105.0
1	General Fund	2017	Not from pledges	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
1	General Fund	2017	From pledges	$266,588.00	$24,070.00	$21,225.00	$16,030.00	$29,775.00	$20,060.00	$18,383.00	$26,105.0
1	General Fund	2016	Total given	$257,525.00	$26,225.00	$19,545.00	$16,565.00	$26,805.00	$21,300.00	$14,815.00	$25,185.0
1	General Fund	2016	Not from pledges	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
1	General Fund	2016	From pledges	$257,525.00	$26,225.00	$19,545.00	$16,565.00	$26,805.00	$21,300.00	$14,815.00	$25,185.0
1	General Fund	2015	Total given	$253,230.00	$15,740.00	$15,660.00	$20,450.00	$23,225.00	$25,295.00	$20,625.00	$18,305.0
1	General Fund	2015	Not from pledges	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
1	General Fund	2015	From pledges	$253,230.00	$15,740.00	$15,660.00	$20,450.00	$23,225.00	$25,295.00	$20,625.00	$18,305.0
1	General Fund	2014	Total given	$254,180.00	$18,805.00	$17,805.00	$21,070.00	$23,735.00	$19,230.00	$21,905.00	$20,060.0
1	General Fund	2014	Not from pledges	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
1	General Fund	2014	From pledges	$254,180.00	$18,805.00	$17,805.00	$21,070.00	$23,735.00	$19,230.00	$21,905.00	$20,060.0
1	General Fund	2013	Total given	$260,275.00	$14,675.00	$16,970.00	$26,915.00	$22,075.00	$20,225.00	$22,615.00	$21,255.0
1	General Fund	2013	Not from pledges	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
1	General Fund	2013	From pledges	$260,275.00	$14,675.00	$16,970.00	$26,915.00	$22,075.00	$20,225.00	$22,615.00	$21,255.0
1	General Fund	2012	Total given	$269,060.00	$24,070.00	$21,225.00	$15,915.00	$29,875.00	$20,210.00	$19,220.00	$27,070.0
1	General Fund	2012	Not from pledges	$269,060.00	$24,070.00	$21,225.00	$15,915.00	$29,875.00	$20,210.00	$19,220.00	$27,070.0
1	General Fund	2012	From pledges	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.0
2	Mission Fund	2020	Total given	$1,570.00	$245.00	$230.00	$180.00	$390.00	$180.00	$110.00	$65.0
2	Mission Fund	2020	Not from pledges	$1,290.00	$205.00	$180.00	$160.00	$245.00	$165.00	$110.00	$65.0

Behavior

The Behavior view of Shepherd's Staff allows you to look at the activity of your givers in several different ways. Knowing this information can help you reach out to contributors for different reasons, such as finding your contributors who pledged, but didn't give during a specific time period, or find out who gave to a specific fund a year ago, but hasn't given within the time period you specify.

1. To access the behavior view, open the contributions module, click on Analysis, and select "Behavior"
2. First, select which group of contributors you want to look at in this view in the "Who" box. You can select from a few different envelope groups, or a specific subgroup by choosing the "* For a subgroup" option.
3. Next, select the behavior you want to track. Options include Gave, Pledged, Did not give, Did not pledge, Gave but did not pledge, Pledged but did not give, Both gave and pledged, neither gave nor pledged, Did not give but gave a year ago, Did not give but pledged a year ago, Did not pledge but pledged a year ago and Did not pledge but gave a year ago.
4. In the From boxes, set the date range that you want to track the selected behavior for. You can choose if you want to consider gifts-in-kind and skipped envelopes by checking or unchecking the "Include gifts-in-kind" and "Include skipped envelopes" respectively.
5. In the "To the following funds" box, you can pick which funds you want to consider for the behavior you selected. If you're having trouble finding a particular fund, you can type the fund name in the "Type here to search" box, and the system will highlight that fund for you. You can also choose to hide or show any inactive funds by checking or unchecking the "Hide inactive funds" box on the right side of this field.
6. After setting all your options, click the "Find" button in the top right corner of the window. In the bottom half of the window, the grid will populate with the names, envelopes, giving, membership, and contact information of the people who meet the requirements of the behavior you set.
7. If you click the print option, you'll see two options. The (default) option prepares a list of the information you see in the grid. with each envelope getting its own entry on the report. The Mailing labels option will let you prepare mailing labels for each contributor on the grid.



Who: (all envelopes)

Behavior: Did not give

Find

From 1/1/2021 to 11/16/2021 ☑ Include gifts-in-kind ☐ Include skipped envelopes

To the following funds — Type here to search... ☑ Hide inactive funds

☑ Building Fund (4)
☑ Church at Large (11)
☑ Education (6)
☑ General Fund (1)
☑ Mens Ministry (8)
☑ Mission Fund (2)
☑ Music Ministry (7)
☑ Social Concerns (12)
☑ Vacation Bible School (5)
☑ Womens Ministry (10)
☑ Young Adults Ministry (9)
☑ Youth Fund (3)

Envelope	Name	Given	Prior period	Giver 1 status	Giver 2 status	Giver 1 last att.	Giver 2 last att.	Giver 1 cell phone
175	Abbott, Jacob	$0.00	$0.00	Member / Active		12/27/2020 Sunday School		
172	Alexander, David and Shirley	$0.00	$2,800.00	Member / Active	Member / Active	12/27/2020 Contemporary...	12/27/2020 Contemporary...	
102	Baxter, Sally	$0.00	$455.00	Member / Active		12/27/2020 Traditional W...		314-958-7780
173	Beaubien, James and Ellen	$0.00	$0.00	Member / Active	Member / Active			
104	Benedict, Tim	$0.00	$890.00	Member / Active		12/20/2020 Traditional W...		314-958-7508
106	Brown, Howard	$0.00	$680.00	Member / Active		11/8/2020 Traditional Wor...		314-958-6504
107	Callaway, Rob	$0.00	$6,315.00	Member / Active		12/27/2020 Traditional W...		314-958-0288
108	Carroll, Carmen	$0.00	$410.00	Member / Inactive		11/8/2020 Traditional Wor...		314-958-6517
109	Carter, Teresa	$0.00	$890.00	Member / Active		12/27/2020 Contemporary...		314-958-1443
110	Chung, Brian and Molly	$0.00	$3,585.00	Member / Active	Member / Active	12/27/2020 Traditional W...	12/27/2020 Traditional W...	314-958-8672
112	Collins, James and Erin	$0.00	$8,630.00	Member / Active	Member / Active	12/27/2020 Traditional W...	12/27/2020 Traditional W...	314-958-1495
113	Cook, Stan and Terri	$0.00	$1,270.00	Member / Active	Member / Active	12/20/2020 Contemporary...	12/20/2020 Contemporary...	314-958-4996
114	Culbertson, Frank	$0.00	$380.00	Member / Inactive		12/27/2020 Contemporary...		314-958-5568
115	Dean, Art and Virginia	$0.00	$475.00	(Removed: Death)	(Removed: Death)	12/27/2020 Contemporary...	12/27/2020 Contemporary...	
116	Dowling, Arlene	$0.00	$680.00	Member / Active		12/27/2020 Traditional W...		(private) 314-958-664
117	Enriquez, Gisele	$0.00	$670.00	Member / Inactive		12/27/2020 Contemporary...		314-958-6033
118	Fernandez, Lou and Pam	$0.00	$1,760.00	Member / Active	Member / Active	12/27/2020 Traditional W...	12/27/2020 Traditional W...	314-958-1700
119	Freeman, Jason	$0.00	$815.00	Member / Active		12/27/2020 Contemporary...		(private) 314-958-514
120	Gibson, Jon and Melissa	$0.00	$1,790.00	Member / Active	Member / Active	12/20/2020 Contemporary...	12/20/2020 Contemporary...	314-958-8219
121	Gomez, Edgar and Anita	$0.00	$17,610.00	Member / Active	Member / Active	12/27/2020 Traditional W...	12/27/2020 Traditional W...	314-958-3050
122	Graham, Phil and Jackie	$0.00	$3,790.00	Member / Active	Member / Active	12/27/2020 Contemporary...	12/27/2020 Contemporary...	314-958-0928

Subgroup Export Print Save 71

Top givers

The Top Givers view allows you to see the top "X" number of givers to a particular fund or set of funds. This view can be handy, as your church may want to somehow recognize these contributors, or reach out to these givers about an upcoming giving campaign.

1. To access the Top Givers view, open the contributions module, and click on Analysis. Then, choose "Top Givers"
2. Select the group of contributors you want to consider in the "Who" box. There are a few preset groups, including (all envelopes), Active envelopes and Inactive envelopes, amongst others. If you want to select just a particular subgroup of givers, select the "* For a subgroup" option and then select the subgroup you want to use in the window that appears.
3. In the "Giving from" boxes, set the date range you want to consider for determining who your top givers are.
4. In the "How many?" box, you can choose how many contributors will be included in your top givers. You can select this number in increments of 10.
5. Next, select which fund(s) you want to consider for your top givers. Check the box next to each fund you want to be considered in the view. If you're having trouble finding a particular fund, type the name of that fund in the "Type here to search..." box. This will highlight the fund on your list. If you want to see any inactive funds you may have, uncheck the "Hide inactive funds" box on the right side of the window.
6. Click the "Find" button in the top right corner of the window, and this will show you the number of contributors you selected in the "How many?" box, in order of who gave the most to who gave the least.
7. If you click the print option, you'll see two options. The (default) option prepares a list of contributors, in order of most giving to least, with a total amount given, and a total to each fund that contributor gave to. The Mailing labels option will let you prepare mailing labels for each contributor on the grid.

Who

(all envelopes)

Giving from 1/1/2020 **to** 11/16/2020

How many? 10

Find

Funds Type here to search...

Hide inactive funds

- [x] Building Fund (4)
- [x] Church at Large (11)
- [x] Education (6)
- [x] General Fund (1)
- [x] Mens Ministry (8)
- [x] Mission Fund (2)
- [x] Music Ministry (7)
- [x] Social Concerns (12)
- [x] Vacation Bible School (5)
- [x] Womens Ministry (10)
- [x] Young Adults Ministry (9)
- [x] Youth Fund (3)

Envelope no.	Name	Total
121	Gomez, Edgar and Anita	$17,610.00
168	Wright, Tim and Robin	$15,040.00
164	Williams, Kent and Candace	$12,590.00
101	Abbott, Dave and Sue	$12,475.00
137	Martin, Chuck and Kathy	$10,720.00
144	Morrison, Jeffrey and Michelle	$9,810.00
127	Henry Jr., James and Rosa	$9,275.00
112	Collins, James and Erin	$8,630.00
138	Martin, Andre and Tanya	$8,605.00
146	Nelson, Rick and Sandy	$8,315.00

Subgroup Export Print Save 10

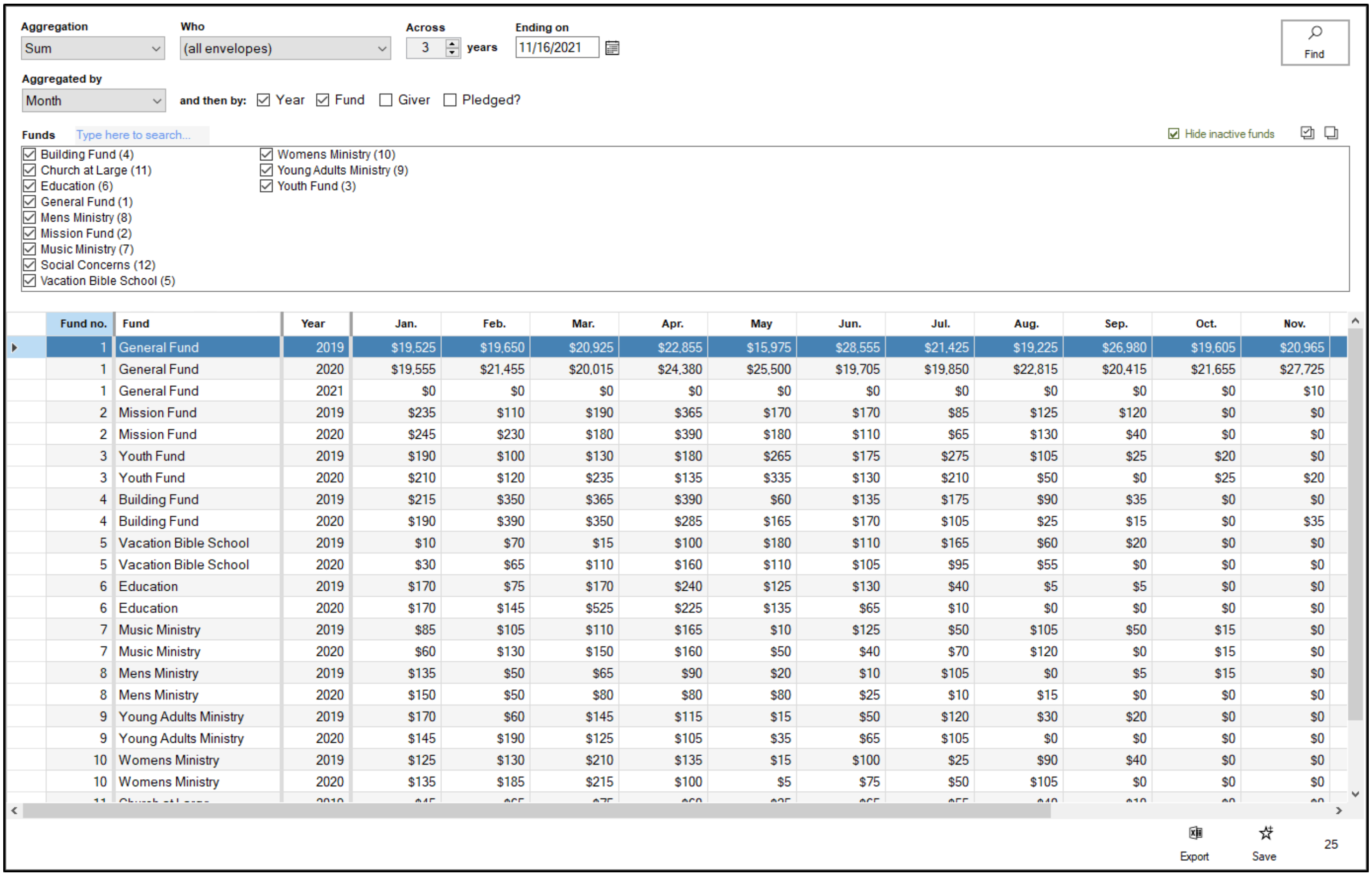
Giving Patterns

The Giving Pattern view allows you to analyze your offerings in many different ways, such as finding out your average giving per month or looking at the number of offerings you received from each giver over the course of the last 3 years. This view is extremely versatile in what kind of information can be pulled from it. In order to best understand how this view works, it's important to break down the different options it provides:

- Aggregation - This refers to what kind of information will be provided by this view. The options are:
  - Sum - This provides the total dollar figure of offerings
  - Average - This provides the average giving amount per the time period/fund/giver you're looking at.
  - Standard Deviation - This provides the standard deviation per time period/fund/giver. The standard deviation describes how dispersed the overall data is from the average.
  - Maximum - This is the highest dollar figure given per time period/fund/giver.
  - Minimum - This is the lowest dollar figure given per time period/fund/giver
  - Count - This is the total number of contribution records per time period/fund/giver
- Who - This refers to what group of people are being considered within the numbers produced by this report. Options include (all envelopes), Active Envelopes, Inactive Envelopes, Current-member envelopes, Non-member envelopes and Removed envelopes.
- Across - This lets you select the number of years this report is looking at. This can be as few as 1, or as many as 15.
- Ending on - This is referring to the last date in the date range you're referring to, in combination with the "Across" field. How far this view looks back is equal to the number of years you set in the across field, minus 1. So, for example, if my across is set to 3 years, and my Ending on is set to 11/15/2021, the view will look at all of 2021 through 11/15, and then back two more years to 2019.
- Aggregated by - This field refers to what increments of time your view is broken down into. You can look at your view by Day of the week, Day of the month, Calendar week, Month, Quarter and Year.
- and then by: This allows you to further organize your giving by a few additional factors. Year, Fund, Giver and Pledged? are all options you can check or uncheck to organize this view.
- Funds - This allows you to select which funds should be considered for calculating your numbers in this view. Check or uncheck each fund accordingly to select if a fund should be considered. If you're having trouble finding a fund, type in the fund name in the "Type here to search box". At the far right side of the

box, you can check or uncheck the "Hide inactive funds" to either hide or show any funds that have been designated inactive.

Once you've set all your options, click "Find" to produce the numbers in the grid at the bottom of the view. You can export these figures out to Excel using the "Export" option.



Fund no.	Fund	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.
1	General Fund	2019	$19,525	$19,650	$20,925	$22,855	$15,975	$28,555	$21,425	$19,225	$26,980	$19,605	$20,965
1	General Fund	2020	$19,555	$21,455	$20,015	$24,380	$25,500	$19,705	$19,850	$22,815	$20,415	$21,655	$27,725
1	General Fund	2021	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$10
2	Mission Fund	2019	$235	$110	$190	$365	$170	$170	$85	$125	$120	$0	$0
2	Mission Fund	2020	$245	$230	$180	$390	$180	$110	$65	$130	$40	$0	$0
3	Youth Fund	2019	$190	$100	$130	$180	$265	$175	$275	$105	$25	$20	$0
3	Youth Fund	2020	$210	$120	$235	$135	$335	$130	$210	$50	$0	$25	$20
4	Building Fund	2019	$215	$350	$365	$390	$60	$135	$175	$90	$35	$0	$0
4	Building Fund	2020	$190	$390	$350	$285	$165	$170	$105	$25	$15	$0	$35
5	Vacation Bible School	2019	$10	$70	$15	$100	$180	$110	$165	$60	$20	$0	$0
5	Vacation Bible School	2020	$30	$65	$110	$160	$110	$105	$95	$55	$0	$0	$0
6	Education	2019	$170	$75	$170	$240	$125	$130	$40	$5	$5	$0	$0
6	Education	2020	$170	$145	$525	$225	$135	$65	$10	$0	$0	$0	$0
7	Music Ministry	2019	$85	$105	$110	$165	$10	$125	$50	$105	$50	$15	$0
7	Music Ministry	2020	$60	$130	$150	$160	$50	$40	$70	$120	$0	$15	$0
8	Mens Ministry	2019	$135	$50	$65	$90	$20	$10	$105	$0	$5	$15	$0
8	Mens Ministry	2020	$150	$50	$80	$80	$80	$25	$10	$15	$0	$0	$0
9	Young Adults Ministry	2019	$170	$60	$145	$115	$15	$50	$120	$30	$20	$0	$0
9	Young Adults Ministry	2020	$145	$190	$125	$105	$35	$65	$105	$0	$0	$0	$0
10	Womens Ministry	2019	$125	$130	$210	$135	$15	$100	$25	$90	$40	$0	$0
10	Womens Ministry	2020	$135	$185	$215	$100	$5	$75	$50	$105	$0	$0	$0

Giving ranges

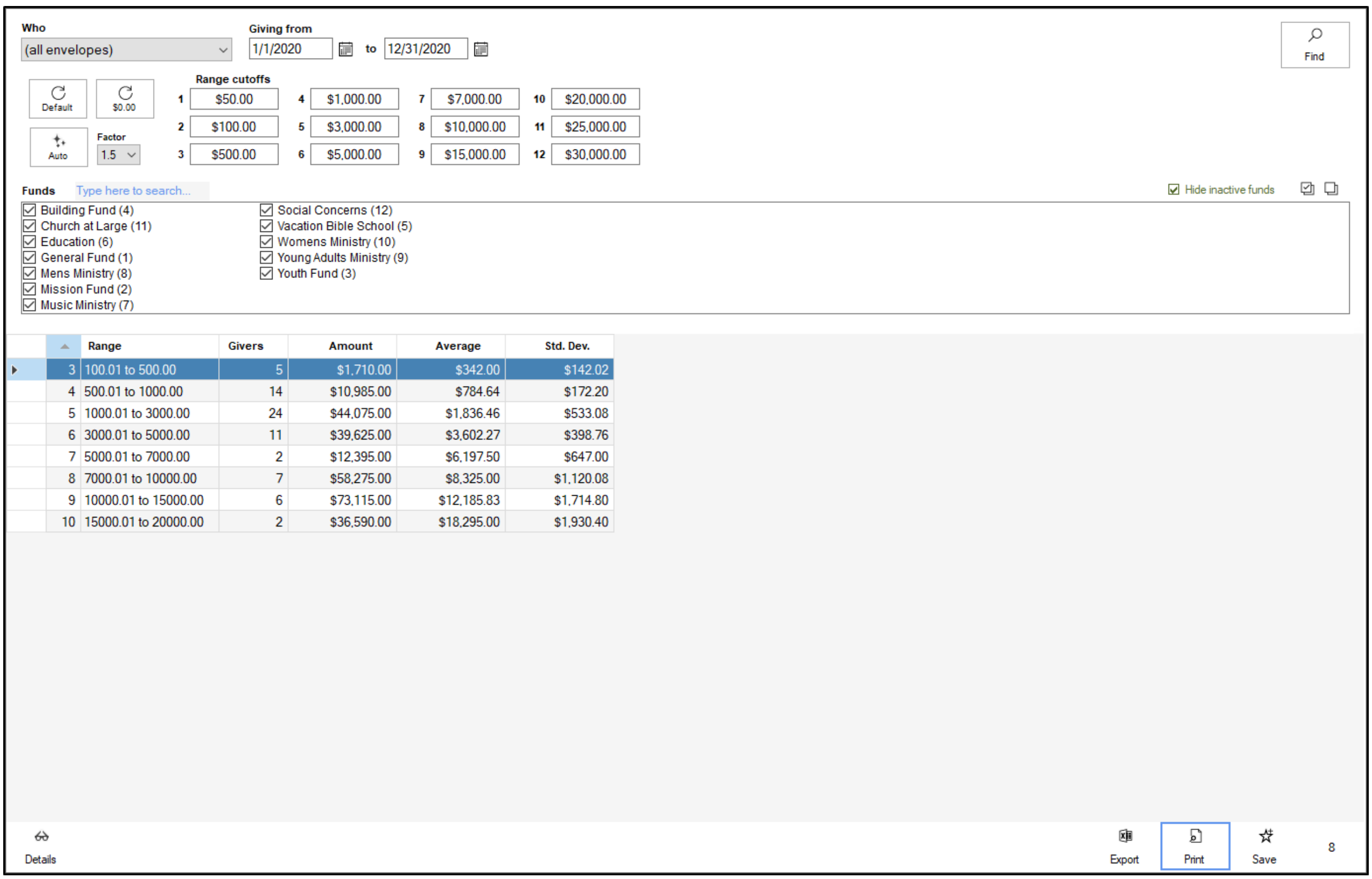
The Giving ranges view allows you to see both total and individual giving in dollar ranges that you specify over the period of time you specify. This is helpful to be able to see how many givers you have at different levels of giving throughout your church.

1. To access the Giving ranges view, open the Contributions module, and click on Analysis, and then click "Giving Ranges".
2. First, select which group of people this view will be looking at in the "Who" box. Options include (all envelopes), Active envelopes, Inactive envelopes and a few others as well. If you want to select a particular subgroup, choose the "* For a subgroup" option, or if you want to pick a particular list or grade, choose the "* For a list or grade" option and select your subgroup, list, or grade in the window that appears.
3. The Giving from box determines what date range is being considered when calculating the figures from this view.
4. The Range Cutoff section has 12 fields. The value listed in each field establishes the top end of each giving range. So, for example, if your first field is set to 50 dollars, this means the first giving range is set to be between 0-50.00 dollars. This means that the next giving range starts at the end of the previous giving range, plus one cent. So in this example, the second giving range would start at 50.01 dollars. Each giving range value has to be higher than the previous value.
5. If you don't want to fill the range cutoffs manually, Shepherd's Staff offers a few automatic options for filling out your giving ranges.
    - Default - This automatically fills in the default values for giving ranges, which can be seen in the image below.
    - $0.00 - This sets each giving range to $0.00. This is useful to give yourself a clean slate to work with when preparing your giving ranges.
    - Auto - This lets Shepherd's Staff determine each of your giving values based upon what you have filled in for your first giving value, and the Factor you select in the box to the right. For example, if your first Range Cutoff value is set to $50, and your factor is 1.5, this means that each range cutoff will be increased by 1.5 times the previous value. So, in this example, value 2 would be $75, value 3 would be $112, and so on.
6. In the "Funs" box, you can pick which funds you want to consider for the giving ranges you're calculating. If you're having trouble finding a particular fund, you can type the fund name in the "Type here to search" box, and the system will highlight that fund for you. You can also choose to hide or show any inactive funds by checking or unchecking the "Hide inactive funds" box on the right side of this field.

7. Click the "Find" button to populate the grid based on the information you have filled in. You'll first see a summary of your giving ranges, showing each range with contributors in it, the number of givers at that range, the total amount of their giving, the average amount of their giving and the Standard deviation of their giving.

8. If you click the "Details" button at the bottom of the grid, this will switch the grid to look at each individual giver within each giving range. You'll see their envelope number, name, what giving range they're in, and the amount they gave during the time period you selected. Click "Summary" at the bottom of the grid to switch back to the summary of your giving ranges.

9. If you click the Print button, you'll receive a report that shows each giving range, the number of givers in that range (Givers), the total amount of money given in that range (Amount), and the percentage of total giving within that time period that range represents (Pct. of total). You'll also see each giver under each range, the amount they gave, the percentage of total giving that giver's giving accounts for (Pct. of Total), and the percentage that giver's giving accounts for within the range they're in (Pct. of Range)



Contribution statements

Contribution statements are individual reports on offerings and pledges that can be used for tax-deduction purposes. Contribution statements also have the ability to show Gifts-in-kind, and nondeductible giving as well. This article will cover each of the options available to you in the Contribution statements report, as well as how to prepare your annual contribution statements.

- Who - This field controls which group of contributors you'll be preparing this report for. A variety of different groups are available, and you can select a particular subgroup by choosing the "* For a subgroup" option, or a particular list or grade by choosing the "* For a list or grade" option.
- Envelope Range - This field allows you to select a specific range of envelope numbers to prepare your contribution statements for. This works in conjunction with the group you select in the "Who" field.
- Offerings from - This field allows you to set what date range of contributions you would like to see represented on your contribution statements.
- Term for "pledge" - This field lets you select what term for "Pledge" should be used if you're showing pledge information on your statements. Pledge is the default option, but if you would like to use your own custom term, select the (custom term) option from the drop list and enter the term you would like to use instead.
- Show difference as - This field is referring to the difference between what has been pledged and what has been given and how that difference is described. The default option is (do not show) which means this difference will be hidden. If you want to show this difference, select one of the other options in this field.
- Funds - This field represents which funds should appear on your contribution statements. Make sure only the boxes of the funds you want to appear on your contribution statements are checked. If you're having trouble finding a fund, you can type the fund name in the "Type here to search..." and the fund you're searching for will be highlighted. The visibility of your inactive funds is determined by the "Hide inactive funds" box on the far right side of this field.
- Giving Filter - This field will further filter out contributors based upon the criteria you set in this field.
    - (no filter) - No additional filtering
    - Those who gave - Only contributors who contributed to any of the selected funds during the selected date range will have a contribution statement prepared through this report
    - Those who did not give - Only contributors who did not contribute to any of the selected funds during the selected date range will have a contribution statement prepared through this report.

    - Those with a pledge - Only contributors who pledged to at least one of the selected funds during the selected date range will have a contribution statement prepared through this report.
    - Those behind on a pledge - Only contributors who pledged to at least one of the selected funds during the selected date range and have not fulfilled their pledge for the time period will have a contribution statement prepared through this report.

- Sort by - This field controls what order to print your contribution statements in.
    - Envelope name - This will print out your contribution statements in alphabetical order, by the last names of the contributors on each envelope.
    - Envelope number - This will print out your contribution statements in envelope number order.
    - Postal code - This will print out your contribution statements first by postal (or zip) code order then in alphabetical order by the last name of the contributors on each envelope.

- Message - This will allow you to include a custom message on your contribution statements. Click the green + icon to create a new message. In the window that appears, fill in the title of the message in the "Message name" field. Then, in the Message field, you can write up to 3000 characters to include in your message. Click "Save" to save the message that you wrote. Saved messages are stored, and can be selected from the drop list in this field. If you want to edit a saved message, select it in the drop list, and click the pencil icon. If you want to delete a saved message, select it from the drop list and click the trash can icon.
- Show - The show section controls what kind of information appears on your contribution statements. You can select any combination of these options to include in your contribution statements.
    - Annual giving history - This option will show annual giving totals broken out by deductible and nondeductible giving, alongside the overall total for each year.
    - Attendance summary - This option will show the number of times each giver on an envelope attended during the selected date range of the statements, broken out by attendance types.
    - Fund summary - This option will show the total giving, broken out by deductible and nondeductible giving to each fund the contributor contributed to within the date range of the statements.
    - Gifts-in-kind - This option will show any gifts-in-kind given by your contributors during the selected date range of the statements.
    - Giving by date - This option will show each date a contributor contributed to any of your selected funds within the selected date range. A deductible, nondeductible and overall total will also be shown.
    - Itemized giving - This option will show each individual contribution a contributor gave during the selected time period, and what fund each of these individual contributions was to. A deductible,

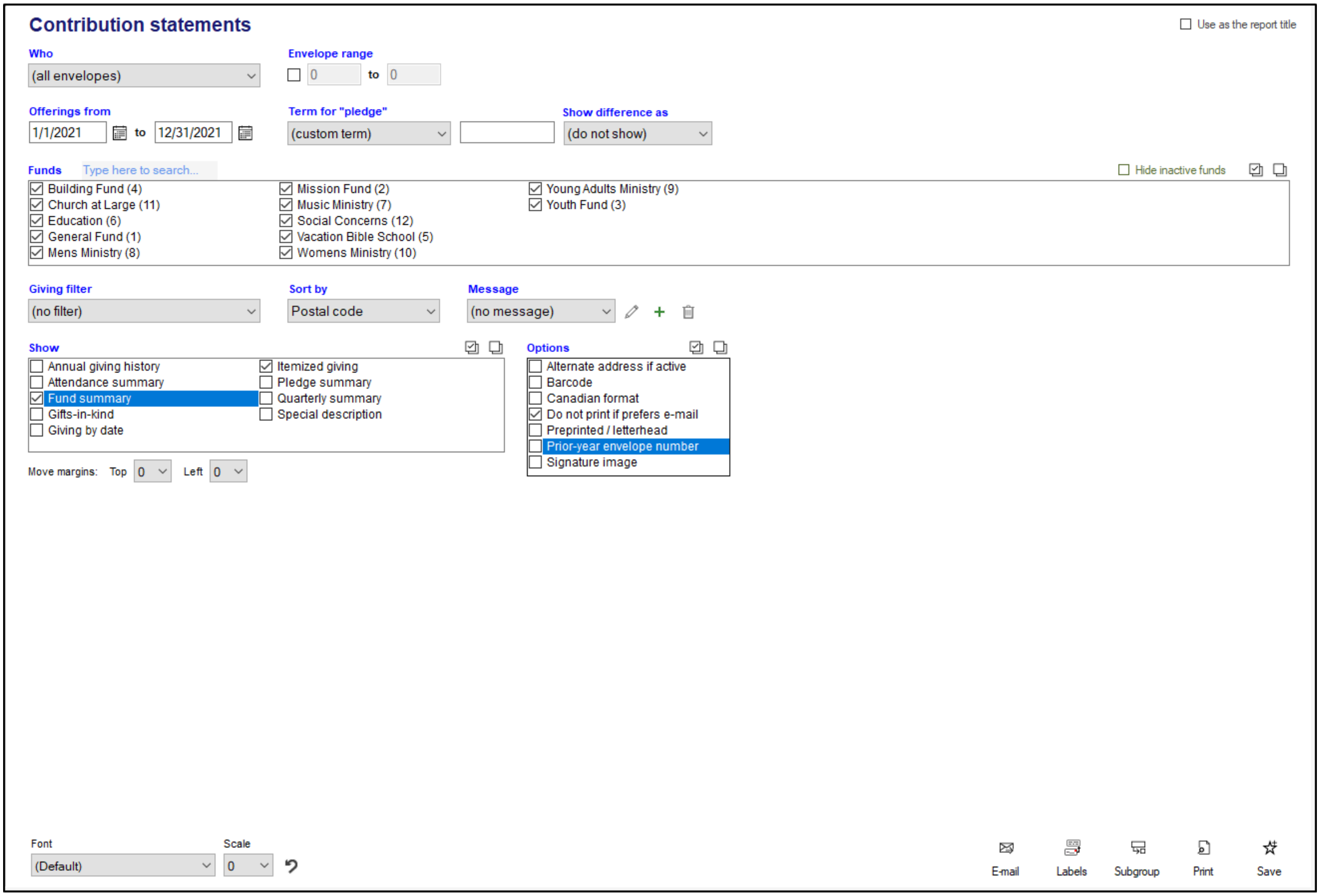
nondeductible and overall total will also be shown.

- Pledge summary - This option will show each pledge the contributor made during the selected time period, their pledged-to-date, any gifts-in-kind that have been applied towards that pledge, and their given-to date.
- Quarterly summary - This will show you deductible, nondeductible, and overall totals for giving for each quarter of the year you have at the beginning of your date range. If your date range doesn't include all of a quarter, only offerings from the part of the quarter you have in your date range will be counted.
- Special description - This option will show each individual offering given by this contributor, by date, as well as the fund and any special description on each offering record.

- Options - The options section of the contribution statements provides a few additional settings for your contribution statements. You can select any combination of these options to include in your contribution statements.
    - Alternate address if active - If this option is checked, and a contributor has an active alternate address in the membership module, instead of printing that contributor's primary address, the alternate address will be printed instead on the statement.
    - Barcode - This will allow you to print out a barcode on your contribution statements. In order for this option to generate the correct barcode for your Church, you'll need to set up Intelligent Mail Barcodes (IMB) in the "Labels" report
    - Canadian Format - This will produce an alternate version of the contribution statement that is compliant with the requirements of the Canadian Revenue Agency (CRA)
    - Do not print if prefers e-mail - This option will make it so any contributors who are designated in their contributor record as preferring to receive their statement via email will not have a contribution statement prepared by this report.
    - Preprinted / letterhead - This option will remove the return address for the church in the top portion of the contribution statement.
    - Prior-year envelope number - This option will show the contributor's previous envelope number instead of their current envelope number. This only tracks the last envelope number a contributor had, it does not go back multiple numbers.
    - Signature image - This allows for the insertion of the signature image you've uploaded in the Tools/Settings section of the Contributions module on your statement. This option is selected by default if your church is located in Canada.

- Move margins - These options allow you to adjust the top and left margins accordingly to accommodate a letterhead, folds you might make on a statement to fit into a windowed envelope or to resolve printer alignment issues. positive values in these fields will move the text down or right accordingly, and negative values will move the text up or left accordingly.

1. You can access the Contribution statements report by opening the Contributions module and clicking Other Reports. From there, click on "Contribution statements"
2. Select which group of people you're running your contribution statements for in the "Who" section. You can also limit which envelopes you're running your statements for in the "Envelope range" section, and filter for givers based on if they did or did not give, pledged, or are behind on a pledge in the Giving filter field.
3. Set the date range for your offerings in the "Offerings from" field
4. Set which funds you want to run the statements for in the "Funds" field.
5. In the Show section, set what type of giving information you want to include. A typical year-end statement might include Fund Summary, and Itemized giving, and if your church does pledges, Pledge summary. Also, make sure to set your "Show difference as" field if your church does pledges and you want to show the difference between what was pledged and what was given.
6. In the options section, set any additional options you may want to have for your statements.
7. Click print, and this will start preparing your contribution statements for printing.


Contribution statements
Use as the report title
Who
(all envelopes)
Envelope range
0 to 0
Offerings from
1/1/2021 to 12/31/2021
Term for "pledge"
(custom term)
Show difference as
(do not show)
Funds
Type here to search...
Hide inactive funds
Building Fund (4)
Church at Large (11)
Education (6)
General Fund (1)
Mens Ministry (8)
Mission Fund (2)
Music Ministry (7)
Social Concerns (12)
Vacation Bible School (5)
Womens Ministry (10)
Young Adults Ministry (9)
Youth Fund (3)
Giving filter
(no filter)
Sort by
Postal code
Message
(no message)
Show
Annual giving history
Attendance summary
Fund summary
Gifts-in-kind
Giving by date
Itemized giving
Pledge summary
Quarterly summary
Special description
Options
Alternate address if active
Barcode
Canadian format
Do not print if prefers e-mail
Preprinted / letterhead
Prior-year envelope number
Signature image
Move margins: Top 0 Left 0
Font
(Default)
Scale
0
E-mail
Labels
Subgroup
Print
Save

Email Contribution Statements

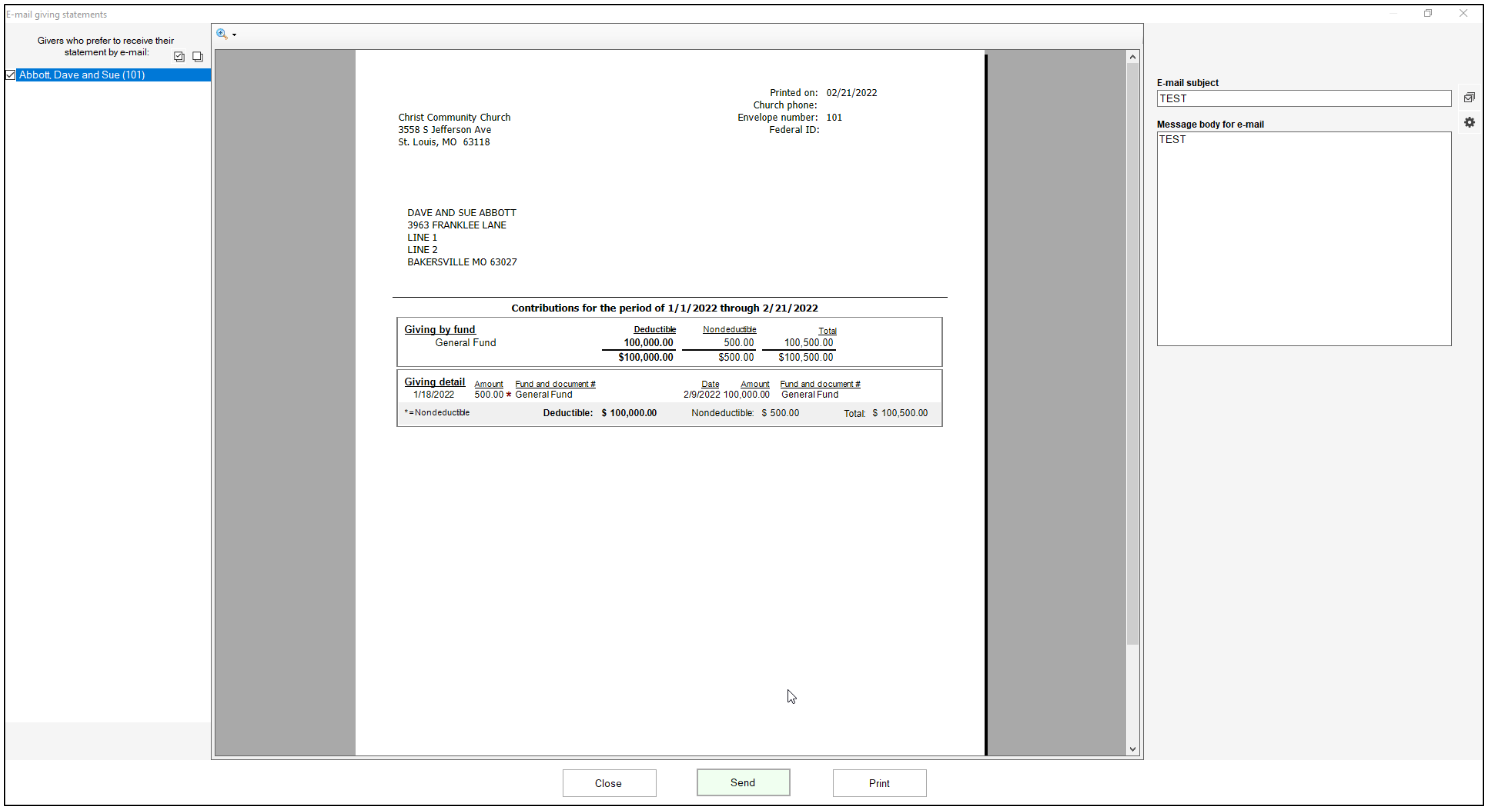
If you wish to email your contribution statements, there is a little setup involved before you can begin.

First, complete the steps in the “Setting up Email” article. This will make sure you have access to the email features in Shepherd’s Staff and that you can use email with this computer’s configuration.

Next, make sure that all contributors who want to receive their statements by email have their "Send statements by" field set to either "E-mail" or "Paper + Email". This can be edited in their contributor record, in the "Statement method" field.

After you've completed these steps, you're now ready to send your contribution statements over email.

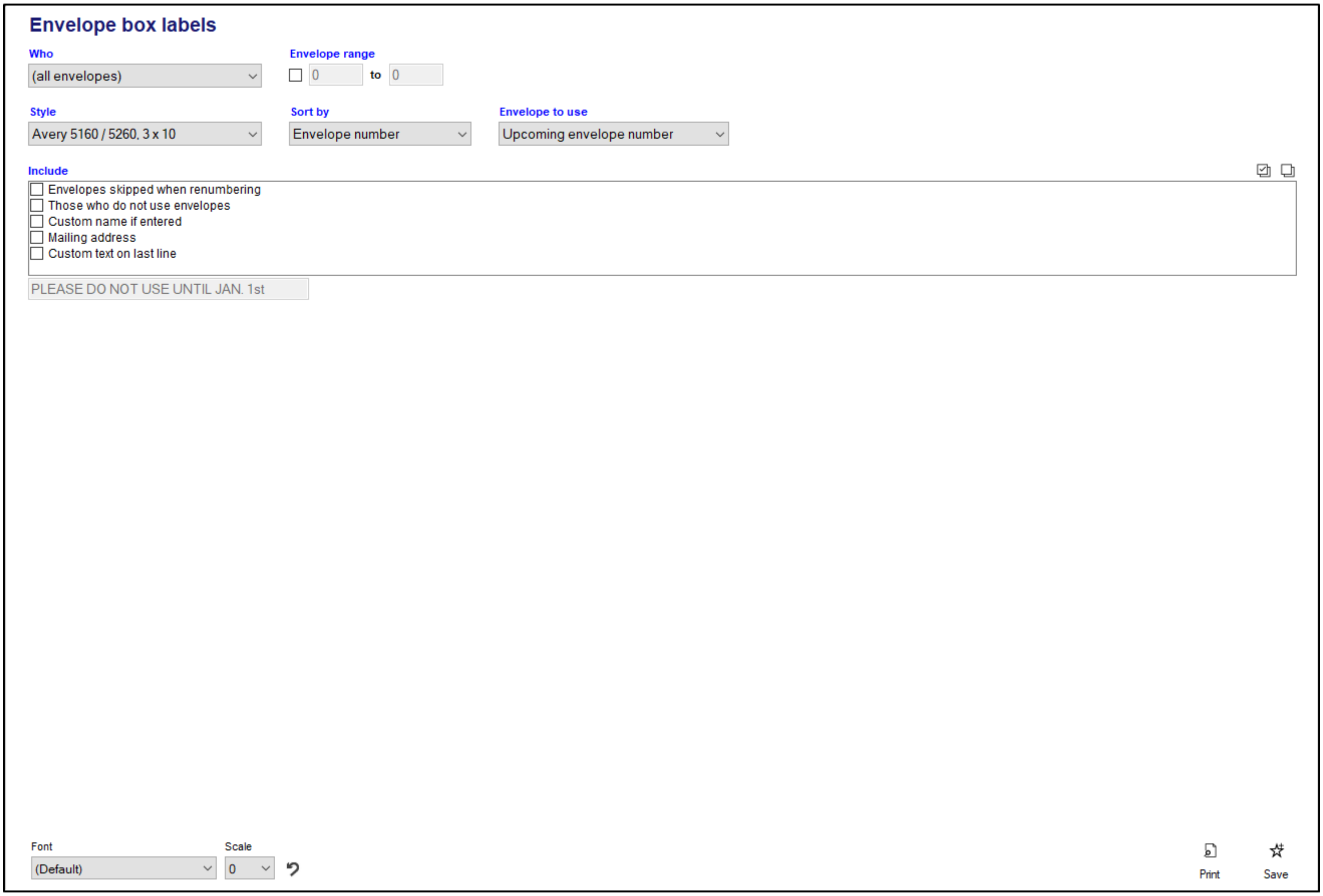
1. In the Contributions Module, click "Other Reports" and choose "Contribution Statements".
2. Set up your contribution statements with whatever options and groups of people you want to use for your reports.
3. When finished setting up your statements, click the "E-mail" button at the bottom right corner of the window.
4. The statements will appear in the preview window in the middle of the screen. On the left side of the window, you will see a checklist with each contributor who will be included in your email blast. You can check or uncheck the box next to each contributor to include or exclude them from the email blast.
5. On the right side of the screen, you can set the email subject and body. This is what will be included in the text of the email. The statement itself will be attached to the email as a PDF for each contributor.
6. Click "Send" at the bottom of the window, and this will start sending the statements out via email. You can close the window when finished.


E-mail giving statements
Givers who prefer to receive their statement by e-mail:
Abbott, Dave and Sue (101)
Printed on: 02/21/2022
Church phone:
Envelope number: 101
Federal ID:
Christ Community Church
3558 S Jefferson Ave
St. Louis, MO 63118
DAVE AND SUE ABBOTT
3963 FRANKLEE LANE
LINE 1
LINE 2
BAKERSVILLE MO 63027
Contributions for the period of 1/1/2022 through 2/21/2022
Giving by fund
Deductible
Nondeductible
Total
General Fund
100,000.00
500.00
100,500.00
$100,000.00
$500.00
$100,500.00
Giving detail
Amount
Fund and document #
1/18/2022
500.00 * General Fund
Date
Amount
Fund and document #
2/9/2022 100,000.00
General Fund
*=Nondeductible
Deductible: $ 100,000.00
Nondeductible: $ 500.00
Total: $ 100,500.00
E-mail subject
TEST
Message body for e-mail
TEST
Close
Send
Print

Envelope box labels

The Envelope box labels report will generate labels that will list either the current or upcoming envelope number for each contributor. This report is especially useful when distributing your envelope boxes to your contributors, as this way you can label each box with the contributor's name and envelope number for easy distribution.

1. To access the Envelope box labels report, open the Contributions module, click Other Reports, then click "Envelope box labels".
2. Select which group of contributors you want to prepare labels for in the "Who" box. You can either run this report for all of your envelopes, or for a particular subgroup of contributors by picking the "* For a subgroup" option. You can also limit which envelopes you run these labels for by checking the box in the Envelope range field and setting a range of envelopes.
3. The style field lets you choose what size labels you're going to be printing onto, either Avery 5161/5261, 2x10, or Avery 5160/5260 3x10.
4. The sort by field will let you choose how your labels are sorted, either by envelope number or envelope name.
5. "Envelope to use" controls which envelope number will be printed on the labels, either the Upcoming envelope number or Current envelope number
6. The include section provides options that control which labels should be prepared, and what kind of content should appear on the labels. These options include:
    - Envelopes to be skipped when renumbering - If checked, this will generate labels for contributors who have been skipped for renumbering purposes.
    - Those who do not use envelopes - If checked, this will generate labels for contributors who have been marked as not using envelopes.
    - Custom name if entered - If checked, instead of using the default envelope name, the custom name entered on the contributor record will be used instead.
    - Mailing address - If checked, the mailing address for the contributor will be included on the label.
    - Custom text on last line - If checked, this will allow for a custom message to be entered on the final line of each label. You can write in the text you want below the include box once this box has been checked.
7. Click print to generate your labels.


Envelope box labels
Who
(all envelopes)
Envelope range
0
to
0
Style
Avery 5160 / 5260, 3 x 10
Sort by
Envelope number
Envelope to use
Upcoming envelope number
Include
Envelopes skipped when renumbering
Those who do not use envelopes
Custom name if entered
Mailing address
Custom text on last line
PLEASE DO NOT USE UNTIL JAN. 1st
Font
(Default)
Scale
0
Print
Save

Envelope box export

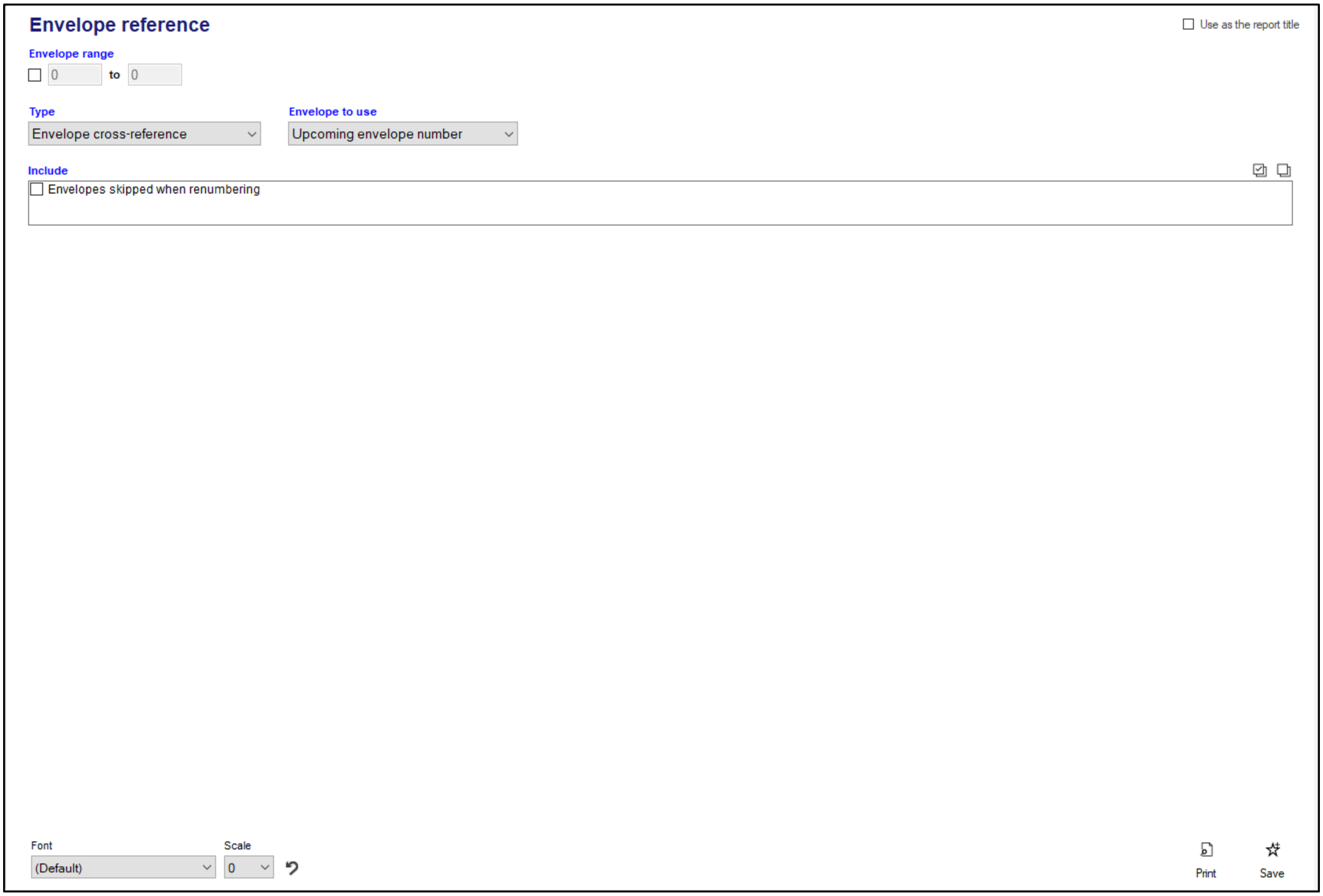
1. To access the Envelope box export report, open the Contributions module, and click on Other Reports, then, click on "Envelope box export".
2. Select which group of contributors you want to prepare your export for in the "Who" box. You can either run this report for all of your envelopes, or for a particular subgroup of contributors by picking the "* For a subgroup" option. You can also limit which envelopes you include by checking the box in the Envelope range field and setting a range of envelopes you want to prepare this export for.
3. The "Export to" field controls how this report will be exported. You can either choose "Spreadsheet program" to export to the default spreadsheet program on your computer directly (typically Excel) or you can choose "Comma-separated values (CSV)" to generate a CSV file that you can save directly to your computer.
4. Sort by controls how the exported report will be sorted, and you can sort either by "Envelope number" or "Envelope name".
5. The "Envelope to use" field controls which envelope number will be used on your exported report.
6. The Include field has several options that affect who and what information will be included on your export. These options include:
    - Envelopes skipped when renumbering - If checked, this will include contributors who have been skipped for renumbering purposes.
    - Those who do not use envelopes - If checked, this will include contributors who have been marked as not using envelopes.
    - Custom name if entered - If checked, instead of using the default envelope name, the custom name entered on the contributor record will be used instead.
    - Unique Contributor ID - If checked, this will include a unique ID number for each contributor, distinct from the envelope number.
    - Custom text - If checked, this will allow for a custom message to be included in its own column. You can type the text you want in the space below the include box once this option has been selected.
7. Click the Export option to export your report out to your spreadsheet program, or to save directly to your computer, depending on what you selected in the "Export to" field.

Envelope reference

The Envelope reference report can provide two different reports. The first of these is the Envelope cross-reference report. This report will show you a listing of all your envelopes that aren't skipped when renumbering, first by name, then envelope number, and in a second column first by envelope number then by name.

The second report the Envelope reference report can provide is the Unused envelope numbers report. This report will show you all unused envelope numbers between 1 and your highest unskipped envelope number.

1. To access the Envelope reference report, open the Contributions module and click on Other Reports, then, click on "Envelope reference".
2. The first field you can adjust is Envelope range. If you check the box for this field, for the envelope cross-reference report, this will set what range of envelope numbers are included on your report. If you use this field in the Unused envelope numbers report, you can set what range of numbers you want to find unused envelope numbers in, including envelope numbers beyond your highest unskipped envelope number.
3. Envelope to use will let you select "Upcoming envelope number", "Current envelope number" or "Prior envelope number". The prior envelope number refers to the last envelope number each contributor was assigned. If a contributor wasn't assigned an envelope number, they are considered to have had envelope 0.
4. If you're using the Envelope cross-reference report, the Include section is available with one option, "Envelopes skipped when renumbering". This will let you include envelope numbers skipped when renumbering on your list.
5. Click print to prepare your report for printing.


Envelope reference
Use as the report title
Envelope range
0
to
0
Type
Envelope cross-reference
Envelope to use
Upcoming envelope number
Include
Envelopes skipped when renumbering
Font
(Default)
Scale
0
Print
Save

› Reports

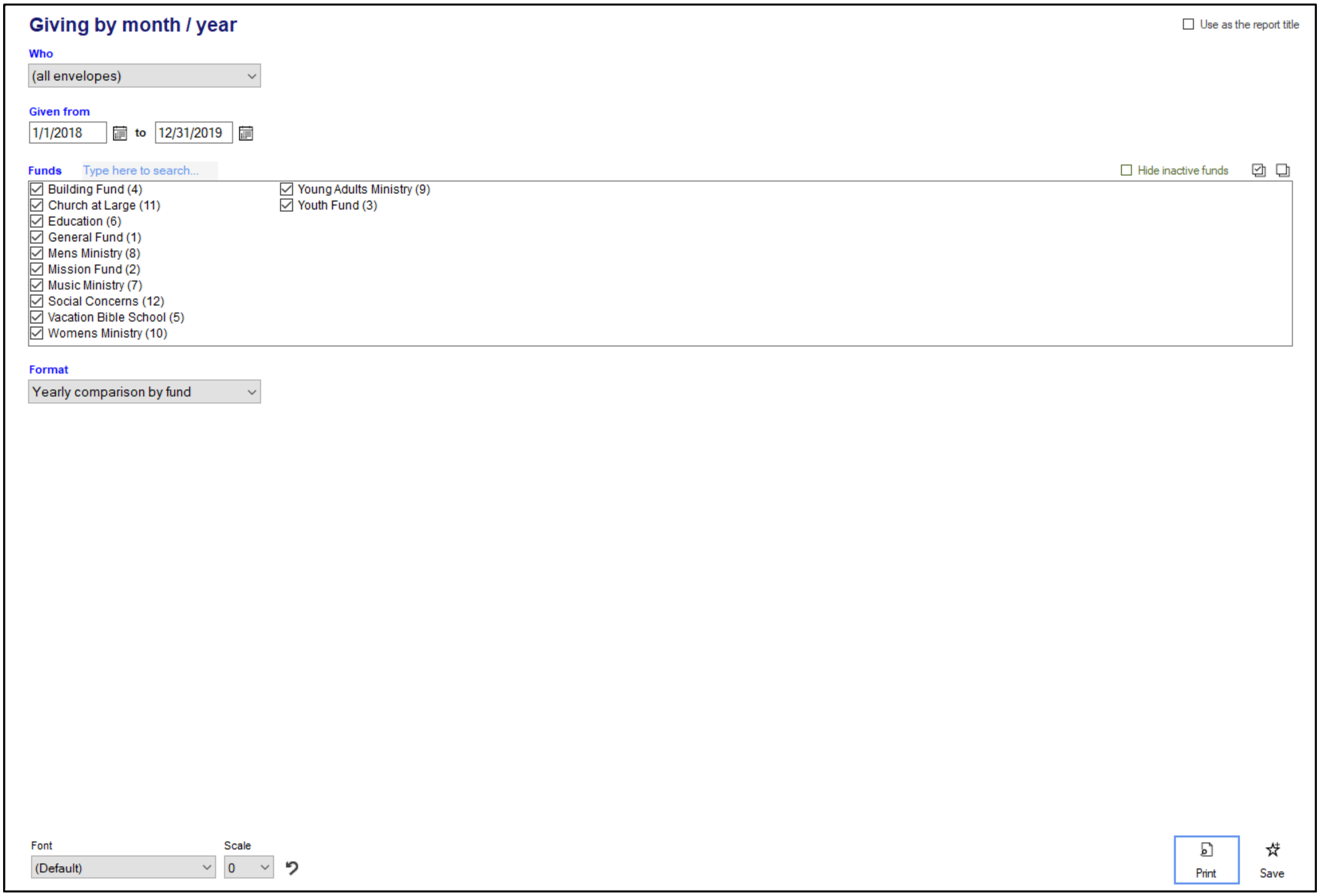
Giving by month/year

The Giving by month/year report is useful for making comparisons between months, between years, and between funds in those time periods. This report will let you select a group of people, a date range, what funds should be considered, and then see totals by month or by year, either for all the selected funds together, or each fund you select individually.

1. To access the Giving by month/year report, open the Contributions module, click on Other Reports, and then, click "Giving by month/year".
2. Select which group of contributors you want to consider for this report in the "Who" box. Options include (all envelopes), Active Envelopes, Inactive envelopes, among others. You can also select a particular subgroup by choosing the "* For a subgroup" option", a particular list or grade by choosing the "* For a list or grade", or for a particular household or person by selecting the "* For one household" or "* For one person" respectively.
3. Set the date range for your report in the "Given from" boxes.
4. Select which funds you would like to include on your report in the "Funds" box. Check off only the funds you'd like to include on the report. If you're having trouble finding a particular fund, start typing the fund name in the "Type here to search..." box, and the fund will be highlighted. If you don't want to see any inactive funds in the list, make sure you check the "Hide inactive funds" box.
5. In the format box, choose what style of report you'd like to prepare.
    - Monthly Comparison - This report will show you the total given to all selected funds combined for each month within the date range, broken out by pledged giving, unpledged giving, total giving, and what percentage of your grand total each month makes up. If you have multiple years selected, then the totals of each of the same months from each year will be added together. For example, if you're running this report for January 1, 2019 to December 31, 2021, then you'll see the combined total for each January together (January 2019+January 2020+January 2021).
    - Yearly Comparison - This report will show you the total giving for each year in the date range of your report, broken down by pledged giving, unpledged giving, total giving and what percentage of your grand total each year makes up.
    - Monthly Comparison by Fund - This report will show you the total giving to each fund you selected, broken out by month, over the date range of the report. If you select multiple years, then the totals of each of the same months from each year will be added together. For example, if you're running this report for January 1, 2019 to December 31, 2021, then you'll see the combined total for each January together for each fund (January 2019+January 2020+January 2021).

- Yearly Comparison by Fund - This report will show you the total giving for each year to each fund over 10 years from the beginning of your date range. You'll see the yearly total for each fund, the overall total over the 10 years shown, and the percentage each fund makes up of your grand total.

6. Click print to generate your report.



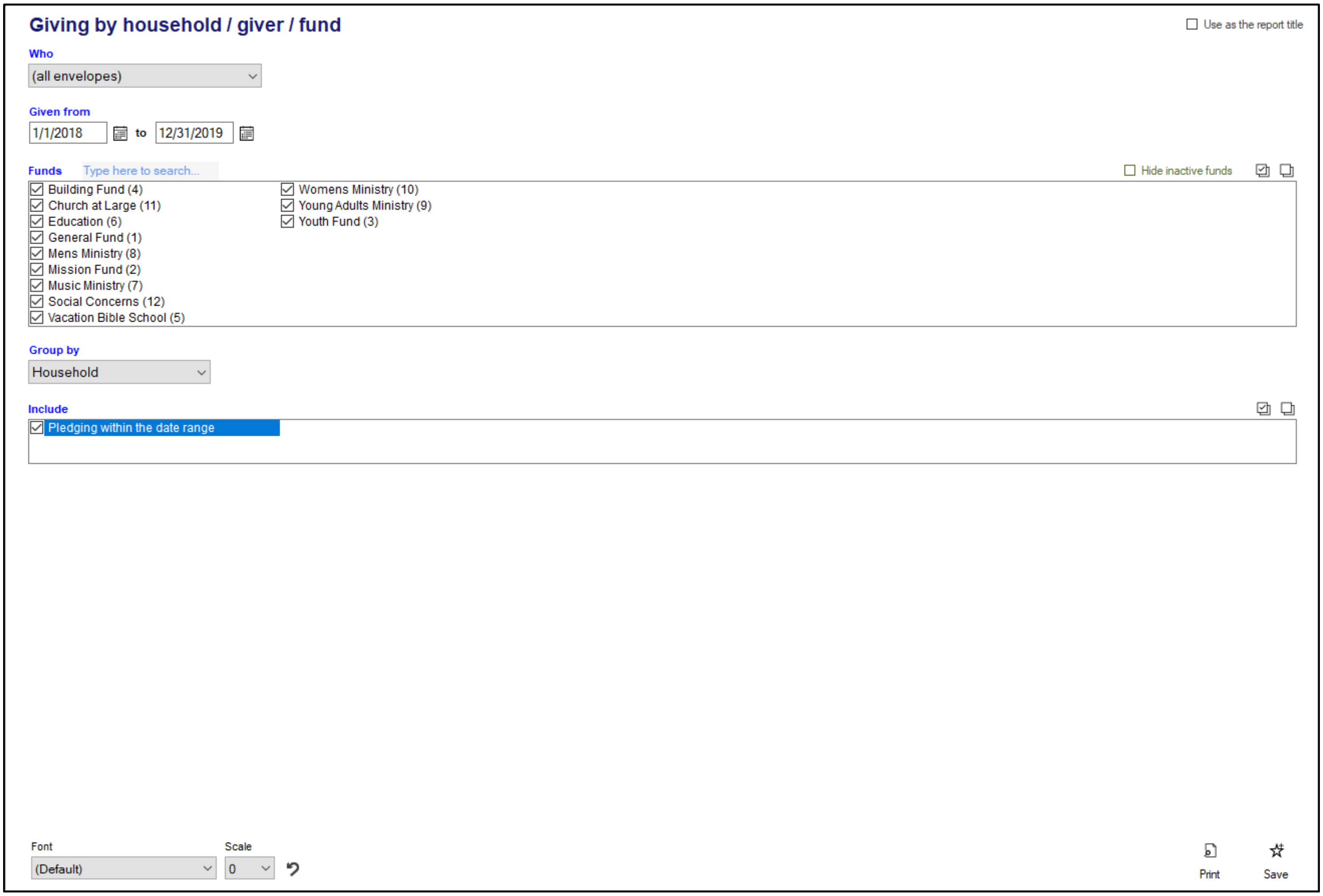
Giving by household/giver/fund

The Giving by household/giver/fund report is a versatile report that can show you giving totals by household, by contributor broken down by fund, or by fund broken down by giver. This report is helpful in seeing contribution totals for different people to different funds.

1. To access the Giving by household/giver/fund report, open the Contributions module, click on Other reports, and then click "Giving by household/giver/fund".
2. Select which group of contributors you want to consider for this report in the "Who" box. Options include (all envelopes), Active Envelopes, Inactive envelopes, among others. You can also select a particular subgroup by choosing the "* For a subgroup" option" or a particular list or grade by choosing the "* For a list or grade" option.
3. Set the date range for your report in the "Given from" boxes.
4. Select which funds you would like to include on your report in the "Funds" box. Check off only the funds you'd like to include on the report. If you're having trouble finding a particular fund, start typing the fund name in the "Type here to search..." box, and the fund will be highlighted. If you don't want to see any inactive funds in the list, make sure you check the "Hide inactive funds" box.
5. The "group by" box will determine what style of report you receive:
    - Household - This report will group together each contributor within a household (if a household has multiple contributors) and show total giving for that household within the time period, and will also show which contributors are part of each household. If the "Pledging within the date range" box is checked, you'll also see a pledged total, a given total, and how far ahead or behind the household is on all of their pledges.
    - Envelope number, fund - This report will show each contributor in the group you selected, sorted by envelope number, and the total that they contributed to each fund you selected. It will also show the last time they contributed to each fund within the date range of the report. If the "Pledging within the date range" box is checked you'll also see a pledged total, a given total and how far ahead or behind the contributor is on their pledge for each fund.
    - Envelope name, fund - This is the same report as "Envelope number, fund", but, instead it is sorted alphabetically by envelope name instead of envelope number.
    - Fund number, giver - This report will show you each fund you selected, in fund number order, and each contributor who contributed to that fund within the date range you selected, the total that they gave, and the last time they contributed to that fund. If multiple years are selected, you'll see a line for each year that contributor contributed to that fund.

- Fund name, giver - This is the same report as "Fund number, giver", but instead it is sorted alphabetically by fund name instead of fund number.

6. Click Print to generate your report.



Pledge progress

The Pledge progress report provides a report that will let you see how your contributors are coming along with their pledges. This report will show you how much a person has pledged (committed to giving) up to the date you select, how much a person has given up to the date you select, and the difference between those figures for each pledge that a contributor has made. This report is useful so you can find people who may be lagging behind on their pledges, and you can reach out to them.

1. To access the Pledge progress report, open the Contributions module click on Other Reports, and choose "Pledge Progress"
2. Select which group of contributors you want to consider for this report in the "Who" box. Options include (all envelopes), Active Envelopes, Inactive envelopes, among others. You can also select a particular subgroup by choosing the "* For a subgroup" option", a particular list or grade by choosing the "* For a list or grade" option.
3. The "Pledges as of" field lets you set up to what point in a pledge you want to see on your report. For example, if a contributor has a pledge for $100 dollars a month to a fund from 1/1/2021 through 12/31/2021, and you set your "Pledges as of" date to 11/30/2021, the pledged to date on the report will read $1100.
    - Note: in this example, if you set it to 11/15/2021 instead, it will only show $1000, because the 11th pledged installment of $100 isn't "due" until the end of the 11th month.
    - This field will also control which pledges you'll see on your report. Any pledges that don't have any active dates that match the date you set in this field will not appear.
        - This means any pledges for prior years or pledges that have not started by the date set in this field will not appear on your report.
4. The "Giving as of" field lets you select what the cut-off date is for offerings to be considered for the pledges on this report. For most reporting, this date will match your "Pledges as of" field.
5. The Pledge status field will also control which pledges appear on your report:
    - (all pledges) - This option will show all pledges within the date range of the report, regardless of fulfillment status.
    - Fulfilled - This option will show only pledges within the date range of the report if the "Given as of" amount meets or exceeds the "Pledged as of" amount for a pledge. (Contributor has met or exceeded their pledge)
    - Not fulfilled - This option will only show pledges within the date range of the report if the "Given as of" amount falls below the "Pledged as of" amount for a pledge. (Contributor has not yet met their

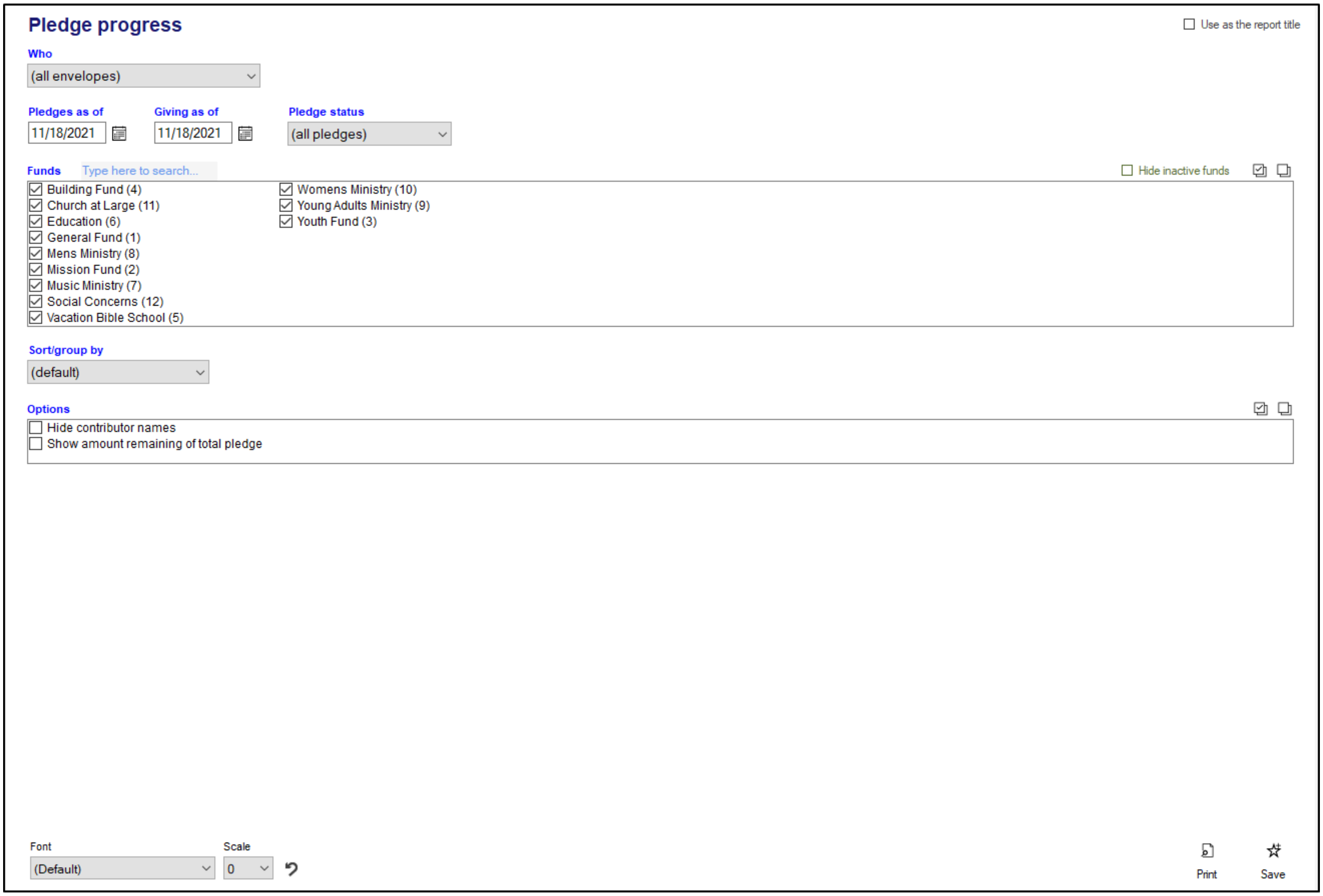
pledge)

- More than this amount - When using this option, you'll set a dollar figure in the box that appears, and then choose if you're looking for those who are that far "ahead" (or more) on their pledge to date, that far "behind" (or more) on their pledge to date or those who have that much remaining (or more) on their total pledge. This option will then only show pledges that fall within the date range of the criteria you set.
- More than this percent - This is similar to "More than this amount" but instead of setting a dollar figure, you'll set a percentage "ahead", "behind" or "remaining". Enter your percentages, put them in like this: 5.5 for 5.5 percent. You do not need to enter 0.055 to get 5.5 percent, and this would give you .55 percent instead.

6. Select which funds you would like to include on your report in the "Funds" box. Check off only the funds you'd like to include on the report. If you're having trouble finding a particular fund, start typing the fund name in the "Type here to search..." box, and the fund will be highlighted. If you don't want to see any inactive funds in the list, make sure you check the "Hide inactive funds" box.
7. The Sort/Group by field controls how your report will be sorted and grouped:
    - (default) - Prints your report in alphabetical order by giver name, with one line per pledge.
    - Giver - Prints your report, grouped by contributor, showing a subtotal for each pledge that contributor has made.
    - Fund, giver - Prints your report, grouped by fund, showing each contributor, sorted by envelope name who made a pledge during the date range of the pledge as their own line.
    - Fund, given-to-date - Prints your report, grouped by fund, showing each contributor sorted by "Given as of" from least to greatest.
    - Fund, pledged-to-date - Prints your report, grouped by fund, showing each contributor sorted by "Pledged as of" from least to greatest.
    - Fund, ahead/behind - Prints your report, grouped by fund, showing each contributor, sorted by "Ahead/behind" from least to greatest.
    - Fund, percentage - Prints your report, grouped by fund, showing each contributor, sorted by "Percentage" from least to greatest

8. The options field will contain a couple of options. First, you can hide contributor names and just show envelope numbers by checking the "Hide contributor names" box. The other option is to "Show amount remaining of total pledge". This will provide an additional column that will show how close a person is to fulfilling their total pledge. This option may automatically get checked or unchecked, depending what options are used in the Pledge Status field.

9. Click print to start generating your report.



Pledge mail merge

The Pledge mail merge report is used to help you prepare letters to send out to your congregation that contains information about the pledges that they've made. This report will produce an export to a spreadsheet, a Microsoft® Word mail merge, or a Comma-separated value file, which you can use to produce your letter.

1. To access the Pledge mail merge report, open the Contributions module, click Other Reports, and choose "Pledge mail merge"
2. Select which group of contributors you want to consider for this report in the "Who" box. Options include (all envelopes), Active Envelopes, Inactive envelopes, among others. You can also select a particular subgroup by choosing the "* For a subgroup" option", a particular list or grade by choosing the "* For a list or grade" option.
3. The "Pledges as of" field lets you set up to what point in a pledge you want to see on your report. For example, if a contributor has a pledge for $100 dollars a month to a fund from 1/1/2021 through 12/31/2021, and you set your "Pledges as of" date to 11/30/2021, the pledged to date on the report will read $1100.
    - Note: in this example, if you set it to 11/15/2021 instead, it will only show $1000, because the 11th pledged installment of $100 isn't "due" until the end of the 11th month.
    - This field will also control which pledges you'll see on your report. Any pledges that don't have any active dates that match the date you set in this field will not appear.
        - This means any pledges for prior years or pledges that have not started by the date set in this field will not appear on your report.
4. The "Giving as of" field lets you select what the cut-off date is for offerings to be considered for the pledges on this report. For most reporting, this date will match your "Pledges as of" field.
5. The Pledge status field will also control which pledges appear on your report:
    - (all pledges) - This option will show all pledges within the date range of the report, regardless of fulfillment status.
    - Fulfilled - This option will show only pledges within the date range of the report if the "Given as of" amount meets or exceeds the "Pledged as of" amount for a pledge. (Contributor has met or exceeded their pledge)
    - Not fulfilled - This option will only show pledges within the date range of the report if the "Given as of" amount falls below the "Pledged as of" amount for a pledge. (Contributor has not yet met their pledge)

- More than this amount - When using this option, you'll set a dollar figure in the box that appears, and then choose if you're looking for those who are that far "ahead" (or more) on their pledge to date, that far "behind" (or more) on their pledge to date or those who have that much remaining (or more) on their total pledge. This option will then only show pledges that fall within the date range of the criteria you set.
- More than this percent - This is similar to "More than this amount" but instead of setting a dollar figure, you'll set a percentage "ahead", "behind" or "remaining". Enter your percentages, put them in like this: 5.5 for 5.5 percent. You do not need to enter 0.055 to get 5.5 percent, and this would give you .55 percent instead.

6. Select which funds you would like to include on your report in the "Funds" box. Check off only the funds you'd like to include on the report. If you're having trouble finding a particular fund, start typing the fund name in the "Type here to search..." box, and the fund will be highlighted. If you don't want to see any inactive funds in the list, make sure you check the "Hide inactive funds" box.
7. The Sort by field controls how your data will be sorted in the exported report. "Envelope name" will sort your data by the envelope name of each contributor, "Envelope number" will sort your data by each contributor's envelope number, "Upcoming env. number" will sort your data by each contributor's next envelope number, and "Postal code" will sort your data first by each contributor's zip or postal code, then by envelope name.
8. The Export to field will let you select how you're exporting your data from the report. "Spreadsheet program" will export the data from this report into your computer's default spreadsheet program (typically Excel). Microsoft® Word mail merge will export the data from this report to Microsoft® Word, with your fields ready to select and use in the "Insert Merge Field" section of Word (Macros must be enabled in Word for this option to work properly). Comma-separated values (CSV) will export your data to a CSV file which you can save to your computer.
9. The options section provides three options. "Alternate address if active" will use the personal or household alternate address, if it is currently active in the Membership module of Shepherd's staff, in place of the primary household mailing address. "Preferred names" will list people's preferred names, as listed in the Membership module, instead of their first names in the Giver's First Names field of the export. "Include country if different" will add a column for which country a giver is in if their country differs from the country that the church is in.
10. Click the "Export" button to export your report to the option you selected in the "Export to" field.

Pledge mail merge

☐ Use as the report title

Who

(all envelopes)

Pledges as of 11/18/2021

Giving as of 11/18/2021

Pledge status (all pledges)

Funds Type here to search...

☐ Hide inactive funds

- ☑ Building Fund (4)
- ☑ Church at Large (11)
- ☑ Education (6)
- ☑ General Fund (1)
- ☑ Mens Ministry (8)
- ☑ Mission Fund (2)
- ☑ Music Ministry (7)
- ☑ Social Concerns (12)
- ☑ Vacation Bible School (5)
- ☑ Womens Ministry (10)
- ☑ Young Adults Ministry (9)
- ☑ Youth Fund (3)

Sort by Envelope name

Export to Spreadsheet program

Options

- ☐ Alternate address if active
- ☐ Preferred names
- ☐ Include country if different

Font (Default)

Scale 0

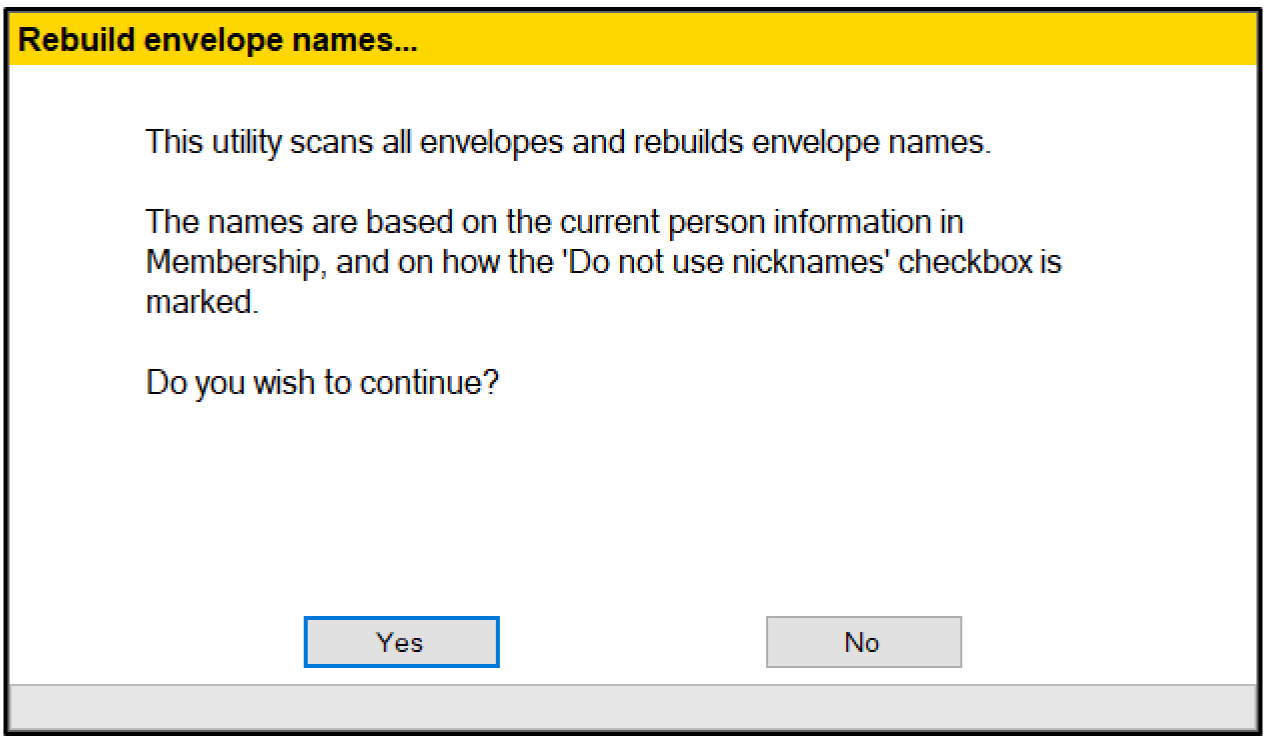
Export

Save

Rebuild envelope names

If you ever notice that the names on an contributor's envelope doesn't match what you have entered in your Membership module, the Rebuild envelope names utility can correct this issue. While this is something that should automatically be synced up, this utility will manually prompt Shepherd's Staff to check, and if necessary update the names on contributors envelopes based on what has been entered in the Membership module of Shepherd's Staff.

1. Open the Contributions module, and click on the "Tools/Settings" button.
2. Under the "Data Tools" heading, select "Rebuild envelope names" and press "Start"
3. In the window that appears, click "Yes"
4. Click "OK" to close the confirmation window.



Customize Field Names

On contributor records, the Contributions module of Shepherd's Staff gives you access to 5 different Giver ID fields. One of those fields is already uniquely named as Vanco, but the other 4 are labeled "Giver ID" and then a number. You can change the names of any of the ID fields, including the Vanco ID field, by using the Customize Field Names option of the Contributions module.

Note: You must be logged in with full supervisor-level access to all modules to be able to make changes to the field names.

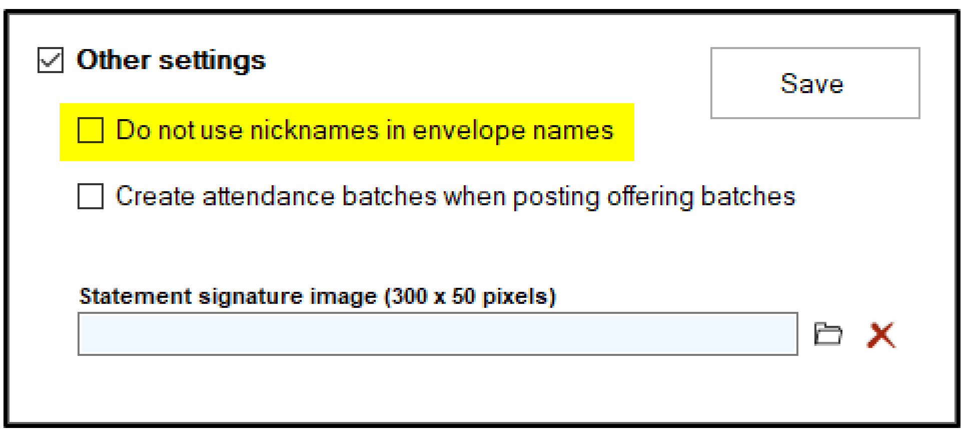
1. To access the Customize Field Names section, open the Contributions module, click on Tools/Settings and check the box for "Customize field names"
2. In the "Field" box, select which field you'd like to make a change to. When you select the field, the current field name will appear in the "Change to" box, and the default name of the field will appear in blue text to the right of the "Change to" box.
3. Type in whatever you'd like the field you selected in the "Field" box to be called. When finished, click Save, and confirm your changes.
4. Close all the way out of Shepherd's Staff, and then reopen it. When you come back into the Contributions module, the field name you changed will be updated to reflect your changes.

Do not use nicknames in envelope names

The "Do not use nicknames in envelope" names feature will make sure that only legal names are used when looking at envelope names in the Contributions module. This would include on the Contributors view, when entering offerings, and when running contribution statements. Typically, you would want this feature turned on at least when running your annual contribution statements, as these statements can be used for tax documentation.

Note: You must be logged in with full supervisor-level access to the Contributions module in order to activate/deactivate this option.

1. To turn on the "Do not use nicknames in envelope names" option, open the Contributions module and then click on the "Tools/Settings" tab
2. Check the checkbox for "Other settings"
3. Check the checkbox for "Do not use nicknames in envelope names".
4. Click "Save"

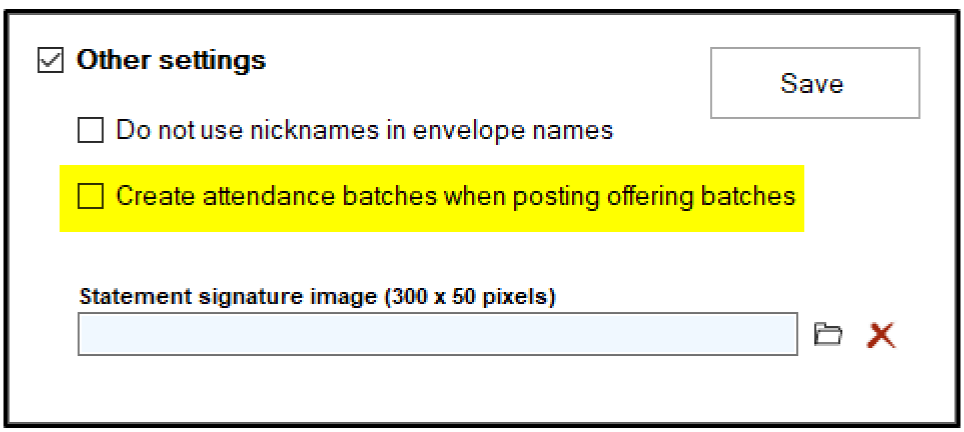


Create attendance batches when posting offering batches

The Contributions module of Shepherd's Staff has the ability to create a batch in the Attendance module that will include all of the people who contributed in an offering batch you create for a particular day. This can be a time-saver for your attendance person, as this can give them a jump-start on creating their attendance batch for an event. However, in order to use this feature, it must first be enabled. By turning this feature on, you'll enable the ability for the person who posts your contribution batches to create a corresponding attendance batch.

Note: You must be logged in with full supervisor-level access to the Contributions module in order to activate/deactivate this option.

1. To turn on the "Do not use nicknames in envelope names" option, open the Contributions module and then click on the "Tools/Settings" tab
2. Check the checkbox for "Other settings"
3. Check the checkbox for "Create attendance batches when posting offering batches"
4. Click "Save"

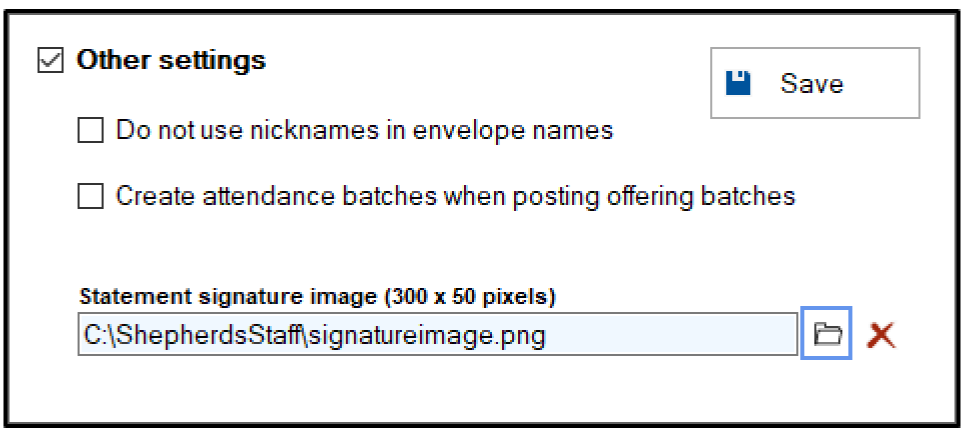


Statement signature image

For our Canadian users of Shepherd's Staff, a signature is required by the Canadian Revenue Agency on contribution statements. Shepherd's Staff provides a way for you to upload a signature image so you can save time by having your signature image printed directly on your contribution statement. This image should be sized to 300 x 50 pixels

Note: You must be logged in with full supervisor-level access to the Contributions module in order to access this option.

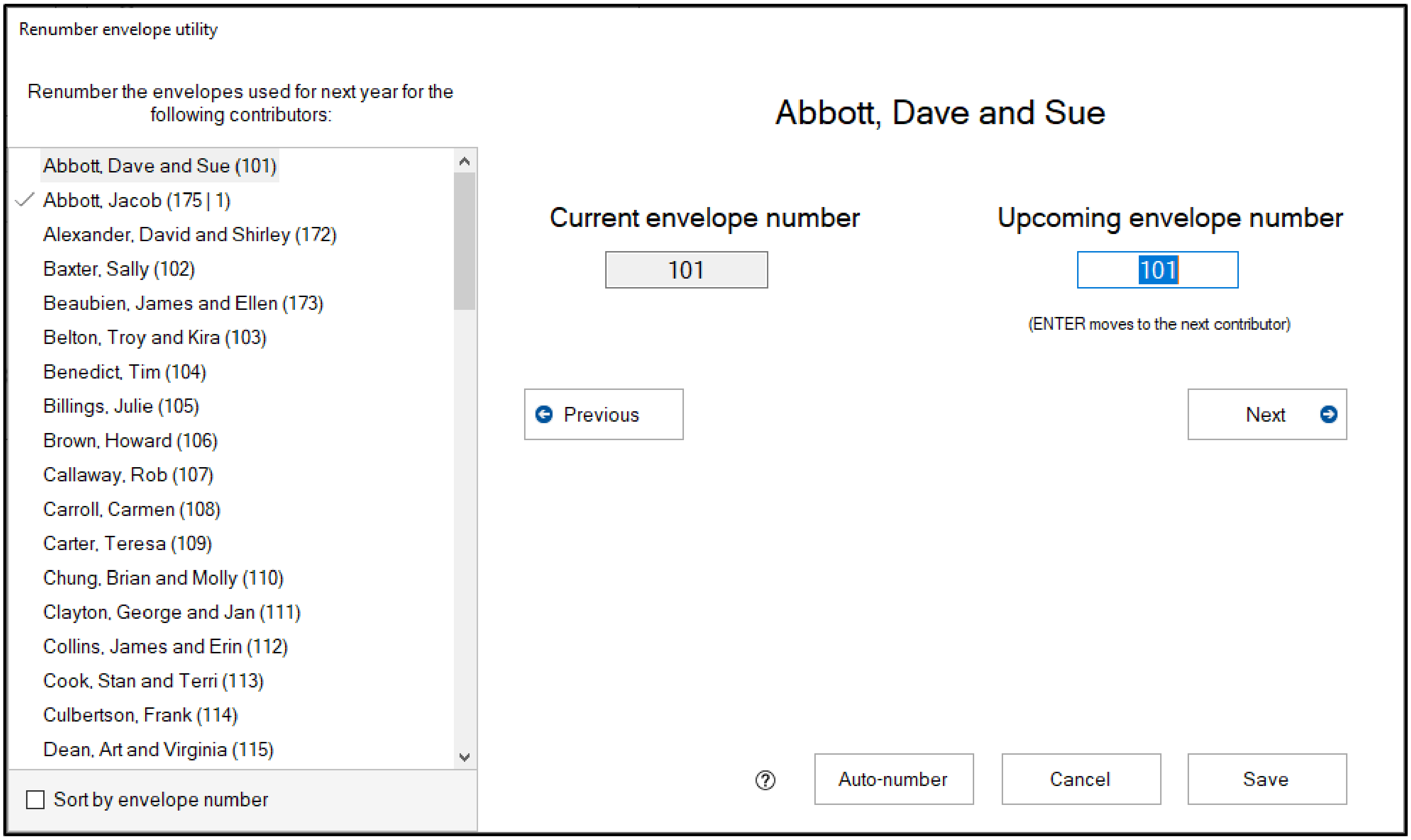
1. To upload a signature image, open the contributions module, and click on "Tools/Settings"
2. Check the checkbox for "Other Settings"
3. Click the Folder icon to open a file explorer window where you can navigate through your computer to find your image.
4. Once you've found the image, click on it in the file explorer window and then click "Open" in the bottom right corner of the window.
5. Click "Save" to save your image to Shepherd's Staff



Renumber Envelopes

Many churches will go through an envelope renumbering process at year-end to consolidate their envelope numbers. Shepherd's Staff offers an envelope renumbering utility that will help prepare these envelope numbers for the new year.

1. To access the "Renumber Next Year envelopes" utility, open the contributions module and go to Tools/Settings. Then, under Envelope tools, select "Renumber Next Year envelopes" and click "Start".
2. In the window that appears, you'll see each of your contributors in the left column. If you prefer to have this column sorted by envelope number instead of name, check the "Sort by envelope number" box at the bottom of the window.
3. When you select a contributor, you'll see two boxes. The first box is the contributor's "Current envelope number", and this cannot be changed here. The second box is "Upcoming envelope number", and this number represents what the contributor's next scheduled envelope number will be, and this is the number you can make changes to.
4. After you've made a change to the first envelope you want to work with, press the enter key on your keyboard to move to the next contributor. You can also do this by clicking the "Next" button. If you need to move back to a previous contributor, click the "Previous" button.
5. After you've updated each contributor, click the "Save" button at the bottom of the window.


Renumber envelope utility
Renumber the envelopes used for next year for the following contributors:
Abbott, Dave and Sue (101)
Abbott, Jacob (175 | 1)
Alexander, David and Shirley (172)
Baxter, Sally (102)
Beaubien, James and Ellen (173)
Belton, Troy and Kira (103)
Benedict, Tim (104)
Billings, Julie (105)
Brown, Howard (106)
Callaway, Rob (107)
Carroll, Carmen (108)
Carter, Teresa (109)
Chung, Brian and Molly (110)
Clayton, George and Jan (111)
Collins, James and Erin (112)
Cook, Stan and Terri (113)
Culbertson, Frank (114)
Dean, Art and Virginia (115)
Sort by envelope number
Abbott, Dave and Sue
Current envelope number
101
Upcoming envelope number
101
(ENTER moves to the next contributor)
Previous
Next
Auto-number
Cancel
Save

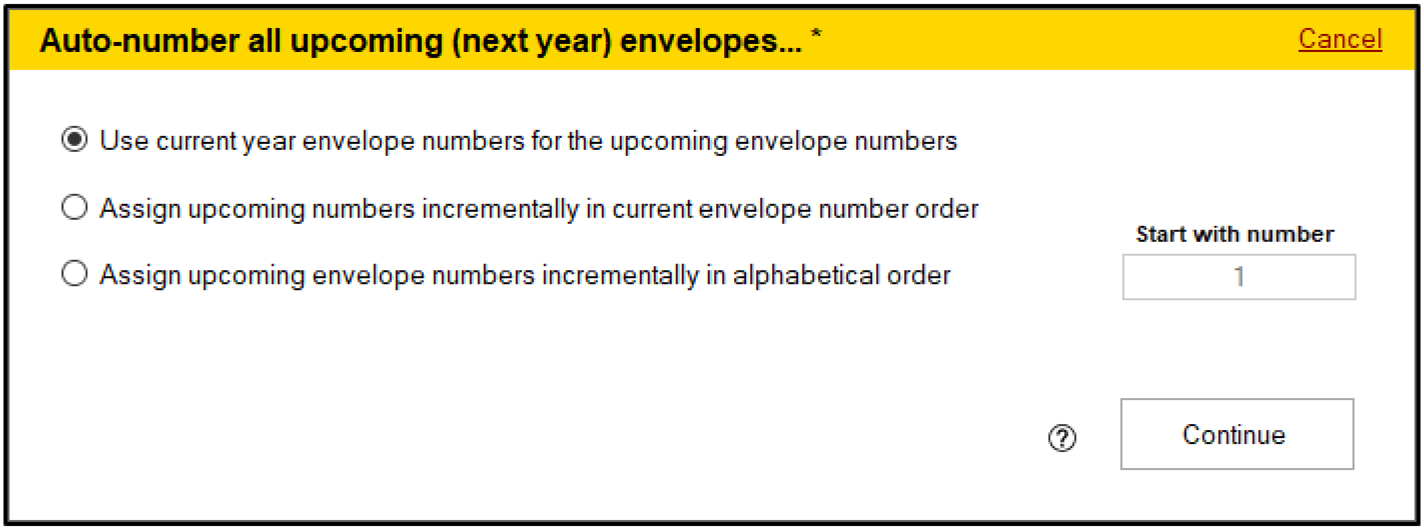
Autonumber Envelopes

Renumbering envelopes for the next year is a common task that many churches will perform at the end of the year. While you do have the option of manually assigning envelope numbers for next year, it can save your church time to have Shepherd's Staff automatically assign envelope numbers for next year. The Auto-number feature of the Renumber next year's envelopes utility can help you do just that.

1. Before starting with this utility, you'll want to make sure that each contributor that you do not want to get an envelope for next year has the "Skip renumber" box checked on their contributor record.
2. You can set the skip renumber status in Contributions under Giving, and then click on the Contributors tab.
3. For each envelope that you want to skip for renumber, double click on the envelope, and check the box for "Skip this envelope when renumbering" in the window that appears. Click the Save button in the bottom right corner when finished.
4. To access the Renumber next year's envelopes utility, open the contributions module, click on Tools/Settings and then select "Renumber Next Year envelopes" under Envelope Tools and click "Start".
5. In the window that appears, click the "Auto-number" button at the bottom of the window.
6. You'll be presented with three choices on how you can renumber your envelopes for next year:
   - Use current year envelope numbers for the upcoming envelope numbers - This option will keep your current envelope numbers for next year, but for anyone who has been designated as being skipped for renumbering, they will instead get an envelope number in the 10,000 range , indicating that they do not have a current envelope number.
   - Assign upcoming numbers incrementally in current envelope number order - This option will let you keep the same envelope number order, but start with a different envelope number, which you pick in the "Start with number" box. So, whoever has your first envelope number in the sequence will still have that first number, but that first number may be a different number. So, for example, if your first envelope number is 100 and it belongs to John Smith, and your church decides that envelope numbers are now going to start from 1, if you use this option, John Smith will now have number 1, and the envelopes will continue in sequence from there (1, 2, 3...) based on who had the next number after John. Those who have been skipped for renumbering will instead receive a number in the 10,000 range, indicating they do not have a current envelope number.
   - Assign upcoming envelope numbers incrementally in alphabetical order - This option will reassign envelope numbers, starting from the number you enter in the "Start with number" box, alphabetically by last name. Those who have been marked as skipped for renumbering, instead of receiving a

number in the sequence this utility uses, will instead be assigned an envelope number in the 10,000 range, indicating they do not have a current envelope number.

7. Click "Continue" and then on the window that appears, click "Yes" to confirm your choice on how you'll be renumbering your next year's envelopes. Finally, click "Save" at the "Renumber envelope utility" window to finalize your selection.



Start using the Next Year envelopes

This is the second half of the Envelope Renumbering process, which takes place after the beginning of your new year. If you have not renumbered your envelopes yet, please check out the "Renumber Next Year envelopes" article. The Start Using Next Year's Envelope Numbers utility makes the envelope numbers you assigned in the "Next Year's Envelopes" field become the current envelope numbers you use in your church. This utility should only be run after a backup has been made, and you are finished entering offerings for your previous year.

Note: You must be logged in with full supervisor-level access to the Contributions module in order to run this utility.

1. Before running this utility, make sure that you've made a backup of your data. This will make it much easier to recover your previous envelope numbers if needed.
2. To access the "Start using the Next Year envelopes" utility, open the Contributions module, and click on "Tools/Settings"
3. Select "Start using the Next Year envelopes" and then click the "Start" button.
4. Confirm that you have made a backup and are ready to activate your upcoming envelope numbers. Once you click Yes, the new envelope numbers will be activated.

Envelope tools

Start

- ( ) Renumber Next Year envelopes
- (•) Start using the Next Year envelopes
- ( ) Renumber Giving IDs

Pledge tools

- ( ) Mass add pledges
- ( ) Attach offerings to pledges
- ( ) Repeat expired pledges

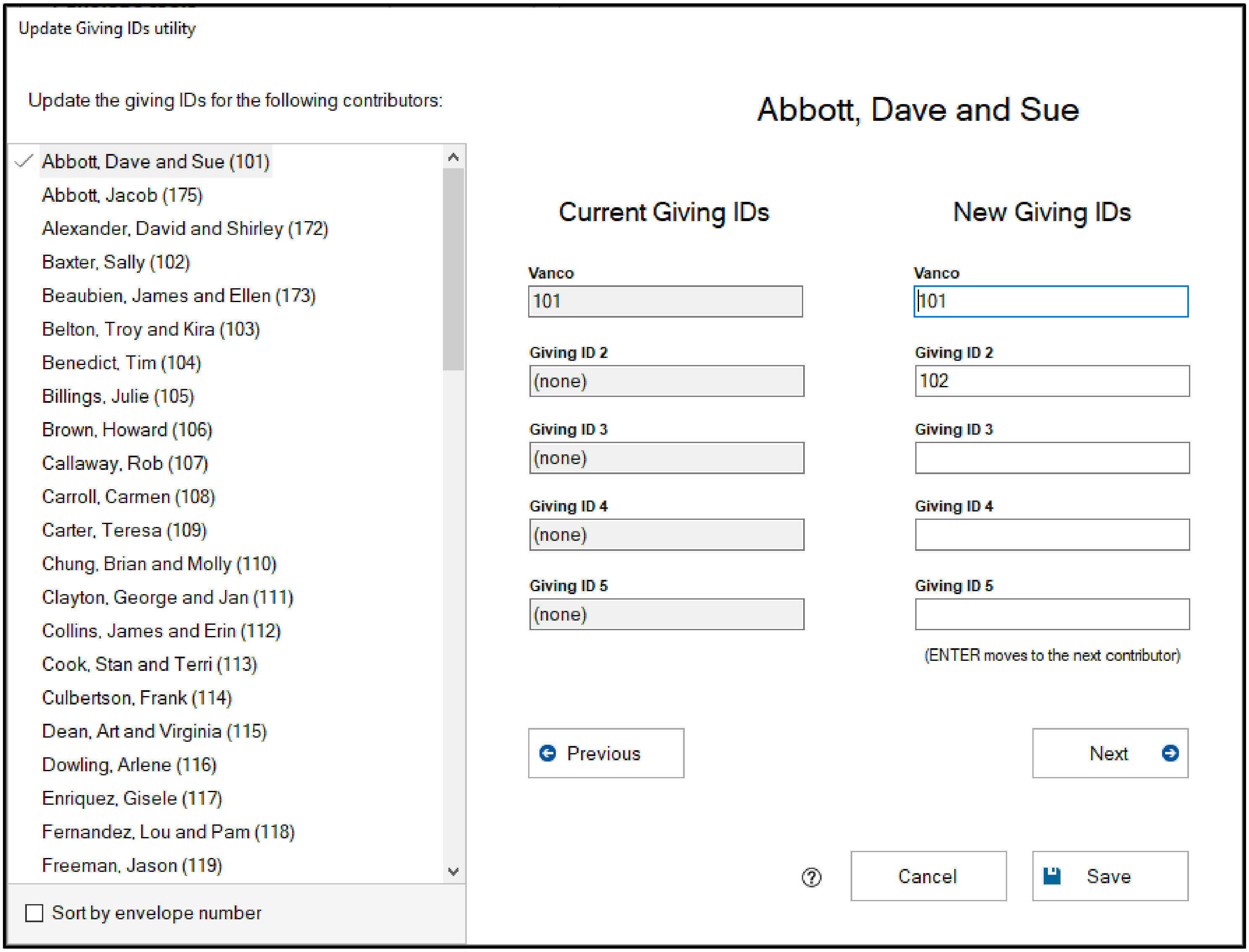
Data tools

- ( ) Clean up your contributions data
- ( ) Combine contributions for two envelopes
- ( ) Swap contributions for two envelopes
- ( ) Fix an offering batch posted to the wrong date
- ( ) Undo an envelope activation
- ( ) Rebuild envelope names

Renumber Giving IDs

Giving IDs connect contributors in Shepherd's Staff with those contributors' accounts in external e-giving platforms. While these giving IDs can be updated in each record individually, Shepherd's Staff offers a utility that will help you update these IDs for all your contributors quickly and easily. The Renumber Giving IDs utility allows you to quickly move between contributors and enter in new or edit existing giving IDs.

1. In the Contributions module, go to Tools/Settings and select "Renumber Giving IDs" under the Envelope Tools heading and click "Start"
2. In the window that appears, you'll see each contributor in the left column. Click on a contributor to select that contributor, and see what their current Giving IDs are. If you want these contributors sorted by envelope number instead of name, check the "Sort by envelope number" checkbox at the bottom of the window.
3. After selecting a contributor, if you want to change any of their giving IDs, you can do so in the rightmost column "New Giving IDs".
4. After making changes to the giving IDs for the first contributor you want to work with, you can press Enter on your keyboard to move to the next contributor on the list. You can also press the "Next" button below the new Giving IDs to move to the next contributor as well. If you need to go back to a contributor you already worked with, click the "Previous" button, under the Current Giving IDs column.
5. When you're finished making changes to all your contributors, click the "Save" button in the bottom right corner of the window. This will save all changes that you made within this window.


Update Giving IDs utility
Update the giving IDs for the following contributors:
Abbott, Dave and Sue (101)
Abbott, Jacob (175)
Alexander, David and Shirley (172)
Baxter, Sally (102)
Beaubien, James and Ellen (173)
Belton, Troy and Kira (103)
Benedict, Tim (104)
Billings, Julie (105)
Brown, Howard (106)
Callaway, Rob (107)
Carroll, Carmen (108)
Carter, Teresa (109)
Chung, Brian and Molly (110)
Clayton, George and Jan (111)
Collins, James and Erin (112)
Cook, Stan and Terri (113)
Culbertson, Frank (114)
Dean, Art and Virginia (115)
Dowling, Arlene (116)
Enriquez, Gisele (117)
Fernandez, Lou and Pam (118)
Freeman, Jason (119)
Sort by envelope number
Abbott, Dave and Sue
Current Giving IDs
New Giving IDs
Vanco
101
Vanco
101
Giving ID 2
(none)
Giving ID 2
102
Giving ID 3
(none)
Giving ID 3
Giving ID 4
(none)
Giving ID 4
Giving ID 5
(none)
Giving ID 5
(ENTER moves to the next contributor)
Previous
Next
Cancel
Save

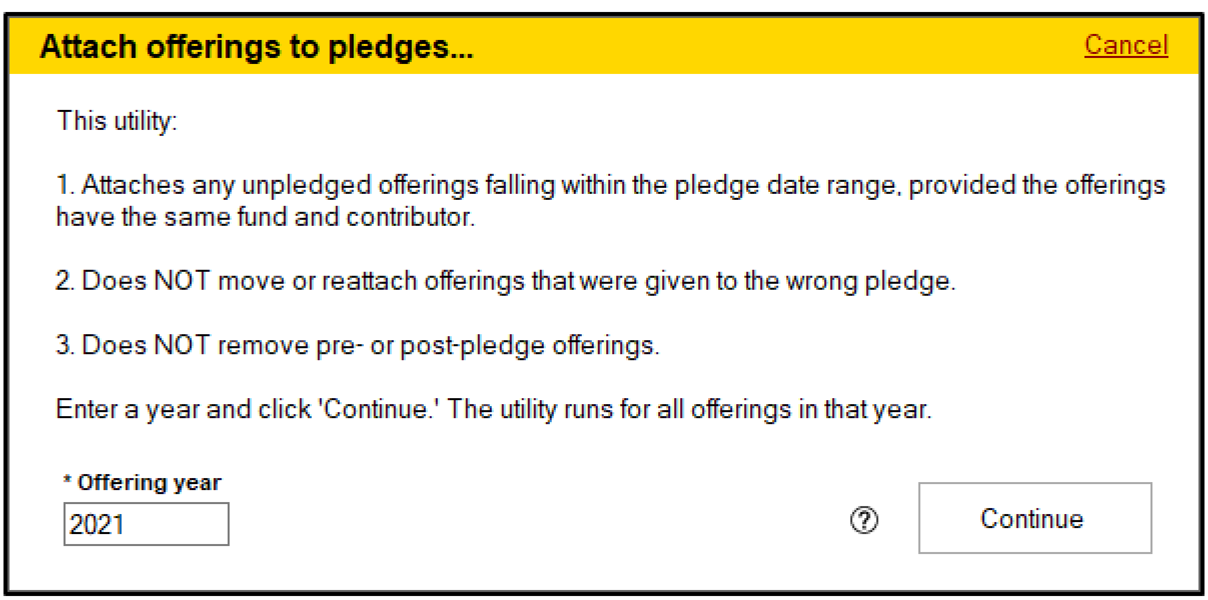
Attach offerings to pledges

In order to count towards a pledge, an offering record must be attached to that pledge. This happens automatically when an offering is entered as part of an offering batch and the contributor selected for the offering has a pledge record that the offering's date falls within the date range of. However, if you enter an offering individually, and don't select that the offering you're entering is part of this pledge, or you've entered offering records during the time period of a pledge before the pledge record has been created in Shepherd's Staff, those offerings will need to be associated with that pledge.

Fortunately, Shepherd's Staff offers a utility that will let you do this quickly for any offerings that fall within a particular year. This utility is called "Attach offerings to pledges".

1. To run the "Attach offerings to pledges" utility, open the contributions module, and click on "Tools/Settings"
2. Under Pledge Tools, select "Attach offering to pledges" and click "Start
3. Set the year you want to run this utility for in the "Offering year" utility.
4. Click Continue.

This will automatically go through your offering records, and any offering records that could be applied towards a pledge for a contributor during the selected year will be attached to that pledge. Be aware that this utility only affects offerings that are not attached to any pledge, and doesn't affect any offerings that fall outside of the date range of a pledge.

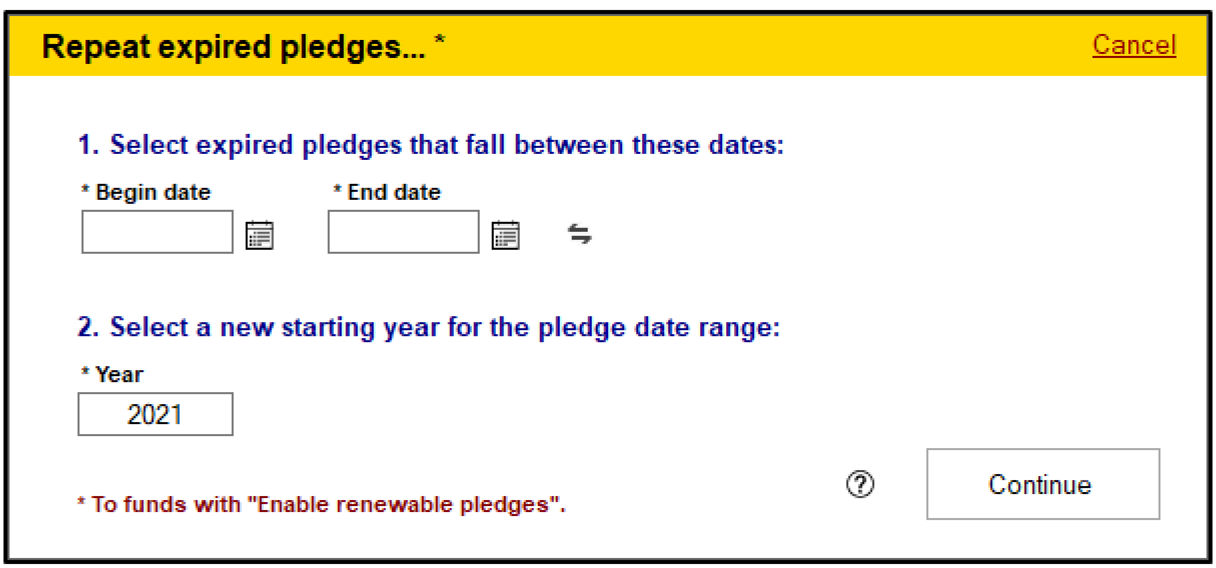


Repeat Expired Pledges

The Repeat Expired Pledges is the new version of the Renew Pledges utility from previous versions of Shepherd's Staff. This utility will find any pledges to funds that have renewable pledges enabled within the date range you select, and create a new pledge for the same amounts, to the same funds for the year you select. Be aware that this only updates the year of the pledge, not the month and day.

For example, if you have two pledges in a year, one that starts on January 1st, 2021 and ends December 31st 2021, and another pledge that Starts on March 1st, 2021 and ends December 31st, 2021, the new pledges this utility would create would be for January 1st, 2022-December 31st, 2022 and March 1st, 2022-December 31st, 2022.

1. To access the "Repeat expired pledges" utility, open the contributions module and under Tools/Settings, in the Pledge Tools section, choose "Repeat expired pledges" and click "Start"
2. In step 1, set the date range of pledges that you want to renew. Any pledge that ends during this date range will have a new pledge created in the year you select in step 2.
3. In step 2, choose the year you want to create these new pledges for.
4. Click Continue, and confirm that you want to create the pledges.

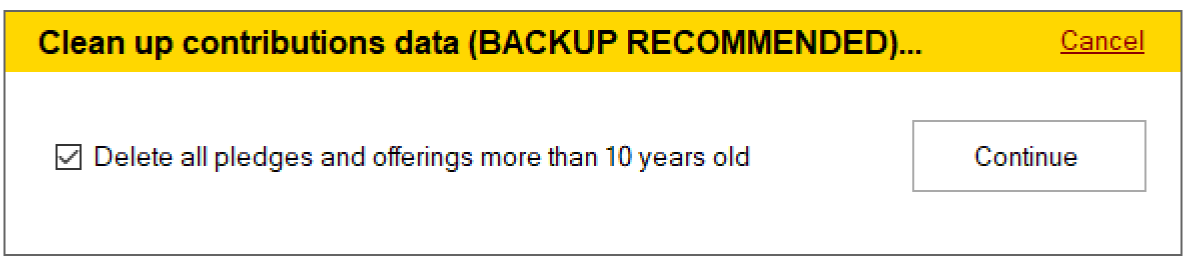


Clean up your contributions data

Though it is not required by Shepherd's Staff, you might wish to remove old data from your contributions module to clean up your database. The "Clean up your contributions data" utility allows you to do this by deleting all pledges and offerings that are more than 10 years old. It is strongly recommended that you make a backup before running this utility.

Note: You must be logged in with full supervisor-level access to the Contributions module in order to run this utility.

1. Before running this utility, make sure that you've made a backup of your data. Data deleted by this utility cannot be recovered unless you have a backup of your database from before you ran the utility.
2. To access the "Clean up your contributions data" utility, open the Contributions module and click on "Tools/Settings"
3. Select "Clean up your contributions data" and then click the "Start" button
4. In the window that appears, check the box labeled "Delete all pledges and offerings more than 10 years old".
5. Click Continue. A window will appear asking you to confirm that you want to delete all pledges and offerings before today's date, 10 years ago. Click Yes to confirm the deletion.

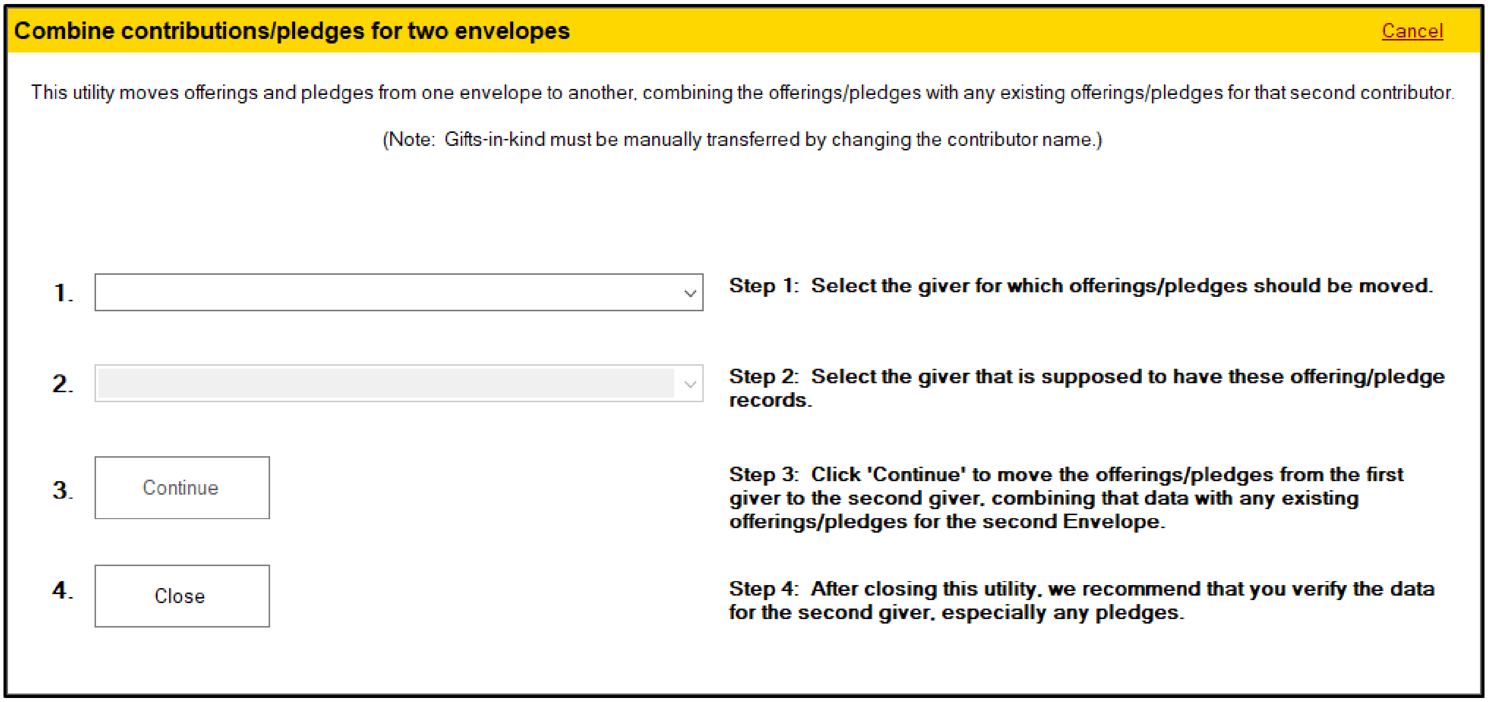


Combine contributions for two envelopes

You may encounter a situation where you need to take all the offerings and pledges from one envelope and move them to another. A common situation where this can happen is when a couple gets married, and both of them have an envelope at your church. The Combine contributions for two envelopes utility is designed to handle this situation. It is recommended that you make a backup of your data before running this utility.

Note: You must be logged in with full supervisor-level access to the Contributions module in order to run this utility.

1. Before running this utility, make sure that you've made a backup of your database. You will not be able to undo what this utility does without restoring a backup from before you ran the utility.
2. To access the "Combine contributions for two envelopes" utility, open the Contributions module and click on "Tools/Settings"
3. Select "Combine contributions for two envelopes" and then click the "Start" button.
4. In the window that appears, if you haven't yet made a backup, click the "Make backup" button, and make your backup. If you have, click the "Yes" button to continue.
5. In the next window, you'll see 4 steps. In step 1, select the envelope number you're going to be taking the offerings and pledges from. This envelope will have all offerings and pledges removed from it.
6. In step 2, select which envelope you'll be moving the offerings and pledges to. This is where the offerings and pledges from the envelope you selected in step 1 will end up.
7. Click Continue. Once the utility is finished, you can then click "Close". This will have moved all the offerings and pledges from the envelope you picked in step 1 and moved them to the envelope you picked in step 2, but this does not delete the envelope you picked in step 1.

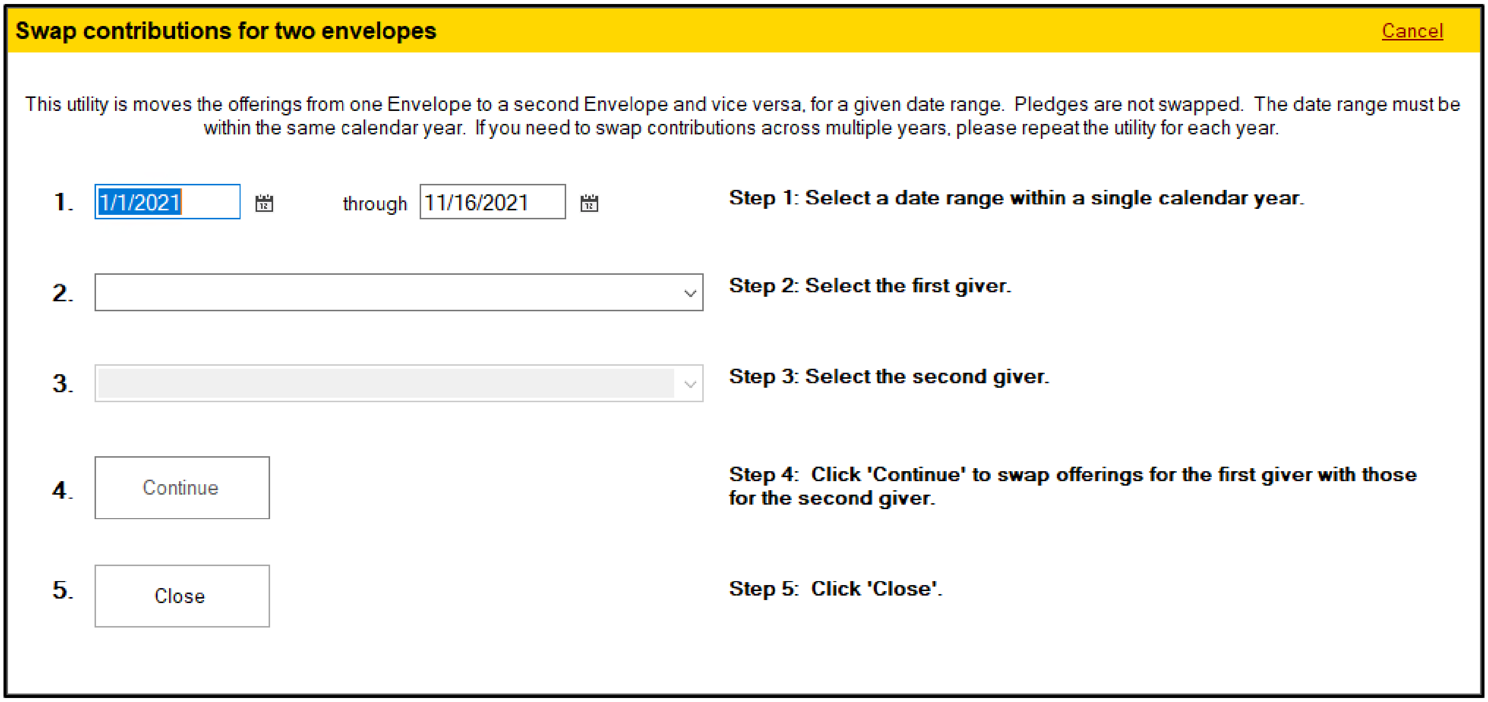

Combine contributions/pledges for two envelopes
Cancel
This utility moves offerings and pledges from one envelope to another, combining the offerings/pledges with any existing offerings/pledges for that second contributor.
(Note: Gifts-in-kind must be manually transferred by changing the contributor name.)
1.
Step 1: Select the giver for which offerings/pledges should be moved.
2.
Step 2: Select the giver that is supposed to have these offering/pledge records.
3.
Continue
Step 3: Click 'Continue' to move the offerings/pledges from the first giver to the second giver, combining that data with any existing offerings/pledges for the second Envelope.
4.
Close
Step 4: After closing this utility, we recommend that you verify the data for the second giver, especially any pledges.

Swap contributions for two envelopes

You may encounter a situation where you had two givers' envelopes transposed, and each giver has been getting credit for the other's offerings. In this case, there may be several offerings that need to be updated, and doing so manually could get confusing fast. It's for this reason that Shepherd's Staff offers a "Swap contributions for two envelopes" utility.

This utility lets you select a date range within a single calendar year and swap the contributions between the two contributors.

1. Before running this utility, make sure to make a backup of your Shepherd's Staff database, as changes made by this utility can only be restored through a backup. (You'll be prompted to make a backup when you start running this utility)
2. To access the "Swap contributions for two envelopes" utility, in the Contributions module, go to Tools/Settings and select "Swap contributions for two envelopes" under "Data tools". Then, click "Start".
3. You'll be asked if you've made a backup today of your data. If you made a backup in step 1, then click Yes. Otherwise, click "Do backup" and make a backup of your data. When finished, click Yes at this screen.
4. In the next window, in step 1, set the date range within a single calendar year that you want to swap offerings for.
5. In step 2, you'll choose the first giver you need to swap offerings on.
6. In step 3, you'll choose the second giver you need to swap offerings on.
7. Click Continue. This will take all the offerings for the time period you selected in step 1, and re-assign the offerings from the giver you selected in step 2 to the giver you selected in step 3. This will also take all the offerings that were assigned to the giver in step 3 in the time period and give them to the giver in step 2.
8. Click Close to close the utility.


Swap contributions for two envelopes
Cancel
This utility is moves the offerings from one Envelope to a second Envelope and vice versa, for a given date range. Pledges are not swapped. The date range must be within the same calendar year. If you need to swap contributions across multiple years, please repeat the utility for each year.
1.
1/1/2021
through
11/16/2021
Step 1: Select a date range within a single calendar year.
2.
Step 2: Select the first giver.
3.
Step 3: Select the second giver.
4.
Continue
Step 4: Click 'Continue' to swap offerings for the first giver with those for the second giver.
5.
Close
Step 5: Click 'Close'.

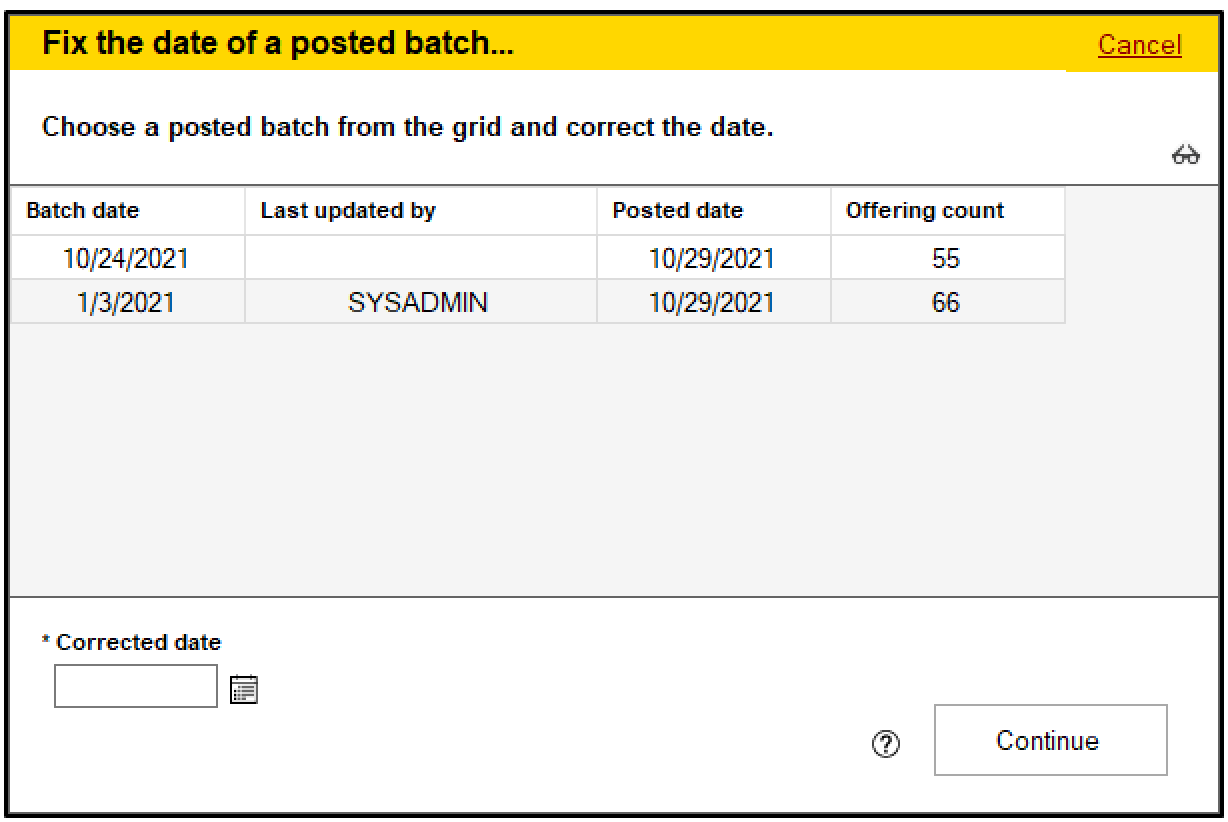
Fix an offering batch posted to the wrong date

Occasionally, you may realize that an offering batch that you've posted was posted to the wrong date. If this happens, Shepherd's Staff offers a way to correct the date on the entire batch. The "Fix an offering batch posted to the wrong date" tool will let you find previously posted offering batches and correct which date the offering batch was posted for, which will update each offering record that the batch contains.

Note: This utility will not make any changes to any deposits created from the posting of an offering batch. The date on the deposit will need to be updated in the Finance module.

Note: You will need supervisor-level access on your login to the Contributions module to access this tool.

1. Before running this utility, make a backup of your Shepherd's Staff database.
2. Open the Contributions module and click on "Tools/Settings"
3. Under Data Tools, select 'Fix an offering batch posted to the wrong date" and click "Start"
4. Click on the batch that you want to change the date for in the window that appears.
5. In the "Corrected date" box, select the date you want to have the offering batch on. You can either type the date in or click the calendar button to the right of the box to select a date.
6. Click the "Continue" option and confirm that you want to change the date of the batch you selected.

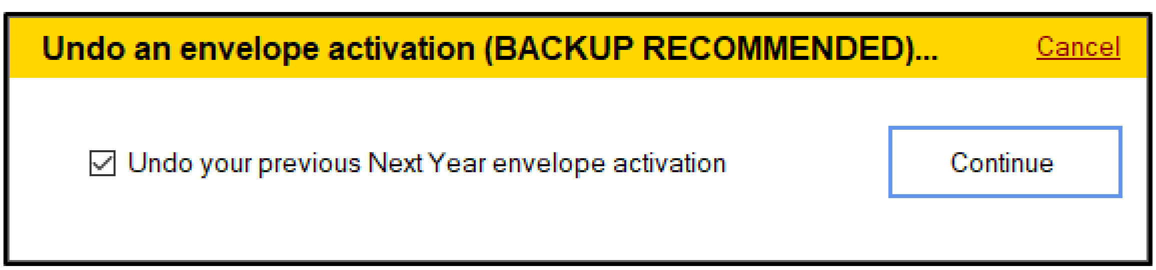


Undo an envelope activation

When going into a new year, your church may renumber the envelope numbers your contributors use in advance of the new year. Once you run the "Start using the Next Year envelope" utility, those numbers you set up in advance are activated and become the new envelope numbers for your contributors. However, there may be situations where you accidentally activate these numbers a little too early, and you might have offerings that you still want to enter under the previous envelope numbers. The "Undo an envelope activation" utility will allow you to undo that activation so you can go back to using the prior envelope numbers. It is recommended you make a backup of your database before running this utility, as it cannot be easily undone without restoring a backup of your data.

Note: You must be logged in with full supervisor-level access to the Contributions module in order to run this utility.

1. Before running this utility, make sure you've made a backup of your data. You will not easily be able to undo this utility without restoring a backup from before you ran this utility.
2. To access the "Undo an envelope activation" utility, open the Contributions module and click on "Tools/Settings"
3. Select "Undo an envelope activation" and then click the "Start" button
4. In the window that appears check the "Undo your previous Next Year envelope activation" and then click "Continue". You'll be asked to confirm your choice, click Yes to confirm.



Accessing WebTools

Overview

Every Shepherd's Staff® customer who has an active support contract has the option of accessing their own secure WebTools site. The data kept in WebTools is safe, and only those individuals with a login to your Shepherd's Staff database can access your WebTools site. Keep your WebTools URL handy because the only way to get it is by logging into Shepherd's Staff. You can always copy and paste the URL into an email and send it to a church staff member so they can use WebTools.

All users who have a username for your Shepherd's Staff database will use their same username and password to log into WebTools. Security settings will carry over from Shepherd's Staff to WebTools. If a user only has access to enter offerings in Shepherd’s Staff, they will only be able to access the offering portion of WebTools.

You can find the link to your WebTools site by going to either of the following places:

» Click on the Webtools Sync button () in the Main Menu of Shepherd's Staff.

» In the main menu of Shepherd's Staff, click on Tools>WebTools Sync.

Christ Community Church

Please enter your user ID and password.

User ID:

Password:

Sign In

Support expiration: 12/31/2025

Need help? Contact us.

Entering Contributions

Entering Offering Batches is similar to how you enter offerings in Shepherd's Staff. It is a simplified and easy to use version of the Offering batches screen.

Entering a name or envelope number into the Search field will search for a particular person. Pressing the Tab key will quickly and easily move the cursor from one field to the next. You also can view specific filters by clicking different tabs under the search bar. Checking any of the boxes at the top of the view will repeat the data from one entry to the next

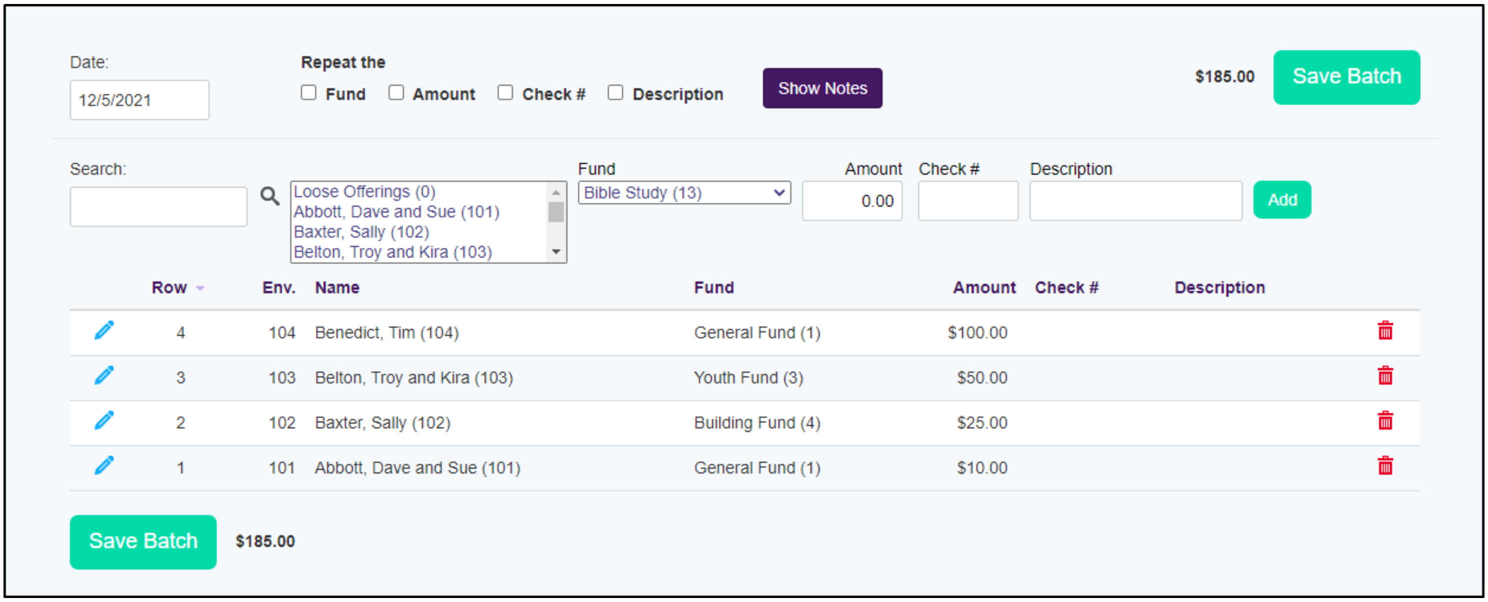
» Repeating: These options can be selected if you are entering several lines with the same information. By checking the Fund box it will automatically select the same fund for each line you add.

» Search: This can be used to quickly find an individual. You can search for a whole name, part of a name, or even just the envelope number.

» Tabbing: Just like in Shepherd's Staff, you can use the Tab key on the keyboard to quickly move from field to field. Tabbing to "Add" and pressing enter will move the cursor back to the search field so you can effortlessly enter large amounts of data without ever touching the mouse.

To enter Contributions:

1. Log into WebTools
2. Open the Offering Batches tab
3. Click Add Batch
4. Select a date and click Continue
5. Enter in the fields and click Add to add the offering


Date:
12/5/2021
Repeat the
Fund
Amount
Check #
Description
Show Notes
$185.00
Save Batch
Search:
Loose Offerings (0)
Abbott, Dave and Sue (101)
Baxter, Sally (102)
Belton, Troy and Kira (103)
Fund
Bible Study (13)
Amount
0.00
Check #
Description
Add
Row
Env.
Name
Fund
Amount
Check #
Description
4 104 Benedict, Tim (104) General Fund (1) $100.00
3 103 Belton, Troy and Kira (103) Youth Fund (3) $50.00
2 102 Baxter, Sally (102) Building Fund (4) $25.00
1 101 Abbott, Dave and Sue (101) General Fund (1) $10.00
Save Batch
$185.00

Editing a Batch in Webtools

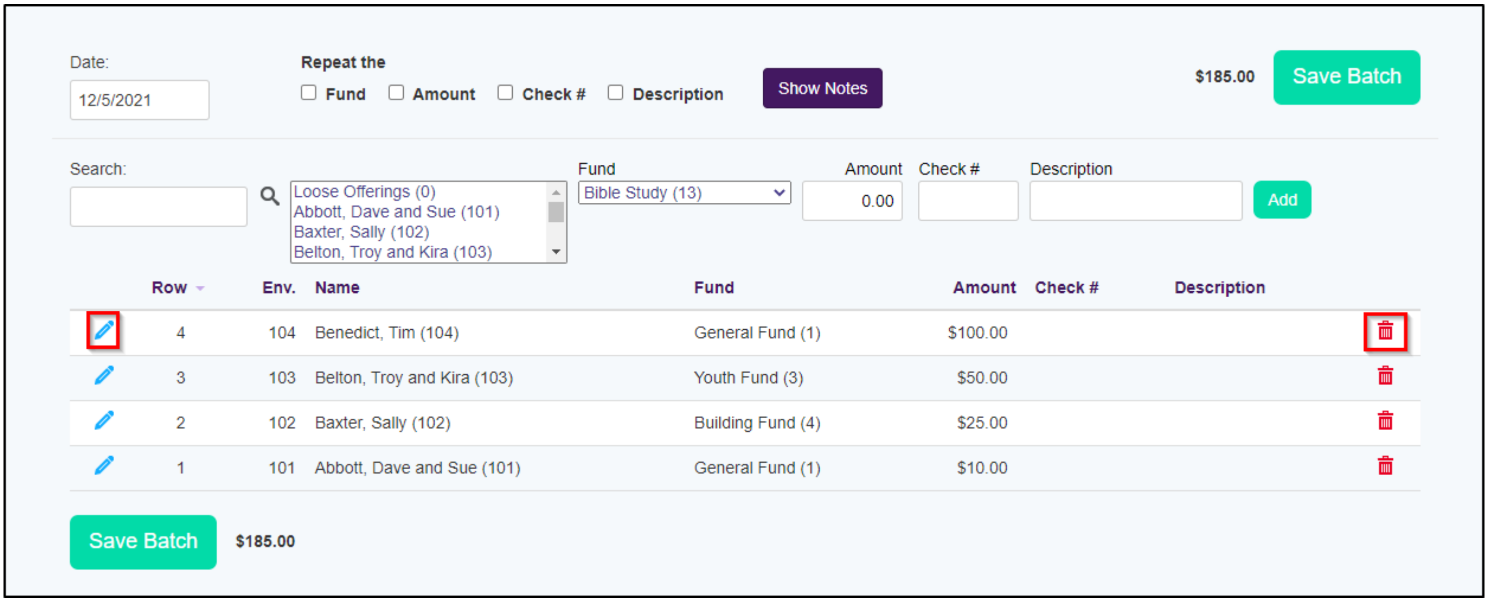
Editing a batch can be done at any time in WebTools as long as the batch has not been imported into Shepherd's Staff. Once it is imported in Shepherd's Staff it will have to be edited in Shepherd's Staff. Not only can the date of the batch be changed, but you can also delete and edit each row in the batch just like you can in Shepherd's Staff. In addition you can always import the batch into Shepherd's Staff and edit the batch that way.

» Edit: You can edit a line in the batch by clicking the pen icon on the row you wish to edit. This will allow you to change the amount, check number, or the description.

» Delete: On the far right you will see a red trash can icon. Clicking this will remove a person from the offering list.

To edit a batch:

1. Log into WebTools.
2. Go to the Contributions Tab
3. Click "Open" for the batch you wish to edit. This will open up the same view as if you were starting a new batch but will include all the previously entered data.
4. Next to each row of the batch on the left side is a pen icon. Clicking it will allow you to edit the amount, check number, and description of the row.
5. After you are done making your changes click the new save icon or click the "x" to cancel the changes
6. To delete the row click the trash can icon on the far left


Date:
12/5/2021
Repeat the
Fund
Amount
Check #
Description
Show Notes
$185.00
Save Batch
Search:
Loose Offerings (0)
Abbott, Dave and Sue (101)
Baxter, Sally (102)
Belton, Troy and Kira (103)
Fund
Bible Study (13)
Amount
0.00
Check #
Description
Add
Row
Env.
Name
Fund
Amount
Check #
Description
4
104
Benedict, Tim (104)
General Fund (1)
$100.00
3
103
Belton, Troy and Kira (103)
Youth Fund (3)
$50.00
2
102
Baxter, Sally (102)
Building Fund (4)
$25.00
1
101
Abbott, Dave and Sue (101)
General Fund (1)
$10.00
Save Batch
$185.00