# Membership

This section provides a general overview of the Membership module in the current release of Shepherd's Staff.

## Introduction to Membership



## Individuals



## Households

- Non-Households Grid
- Household Tree
- Household Records
- Add Household

See all 15 articles

## Lists

- The Lists Grid
- Add Activity
- Add Skill/Spiritual Gift
- Add Training
- Add Person Assigned
- Add Ministry Group

See all 8 articles

## Add/Edit Records

- Adding to a Family
- Handling Marriages
- Managing a Divorce
- Remove a Person from Membership
- Move a Person to a Different Household
- How to Edit a Household Name

See all 12 articles

## Anniversaries, Volunteer search, and Parent Search

## Ministry



## Church Register

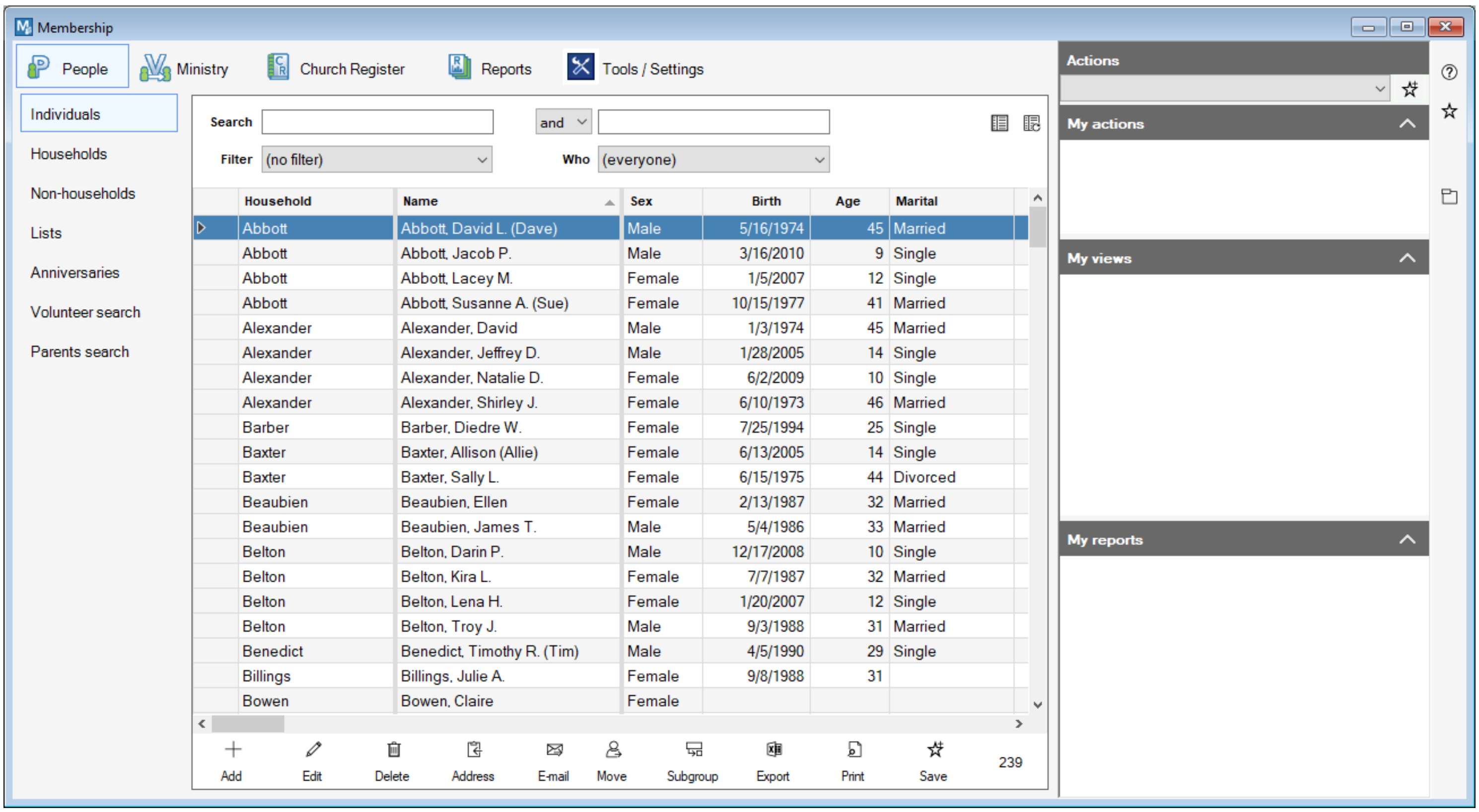


## Reports

## Tools and Settings

# Introduction to Membership Module

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



# Dashboard

The Church Dashboard provides a quick snapshot of your data for the Membership, Attendance, Contributions and Finance module. It provides you with at-a-glance statistical information broken down in several different ways.

There are a couple common functions among the dashboards for the different modules:

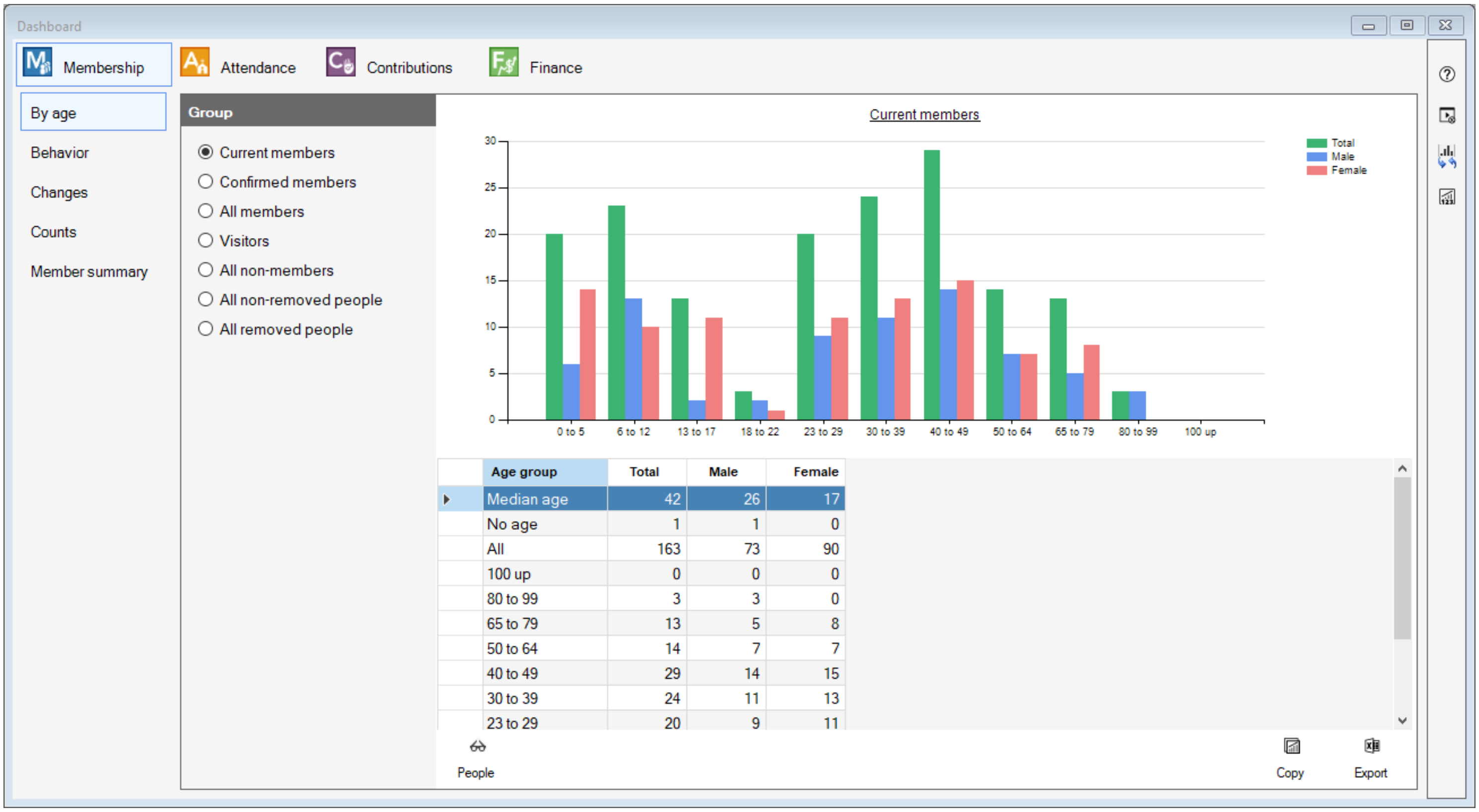
- Copy - This will copy the currently displayed chart to the Windows clipboard to be pasted into another program, such as Microsoft Word
- Export - This will export the currently displayed information on a grid out to a spreadsheet program.

There are also a set of buttons along the side, under the Help button that will affect the dashboard as well:

- Show the Dashboard on start up? - If clicked, this button will turn blue. When this is toggled on, every time you start Shepherd's Staff, the dashboard will appear automatically
- Cycle through the available chart types - If a chart is displayed, this will cycle through the different types of charts, such as bar and line charts.
- Show or hide values on the graph - This will make it so the values of different points on the graph will be displayed directly on the graph.

Four of the Shepherd's Staff modules offer a dashboard with information that is unique to that module:

- Membership
- Attendance
- Contributions



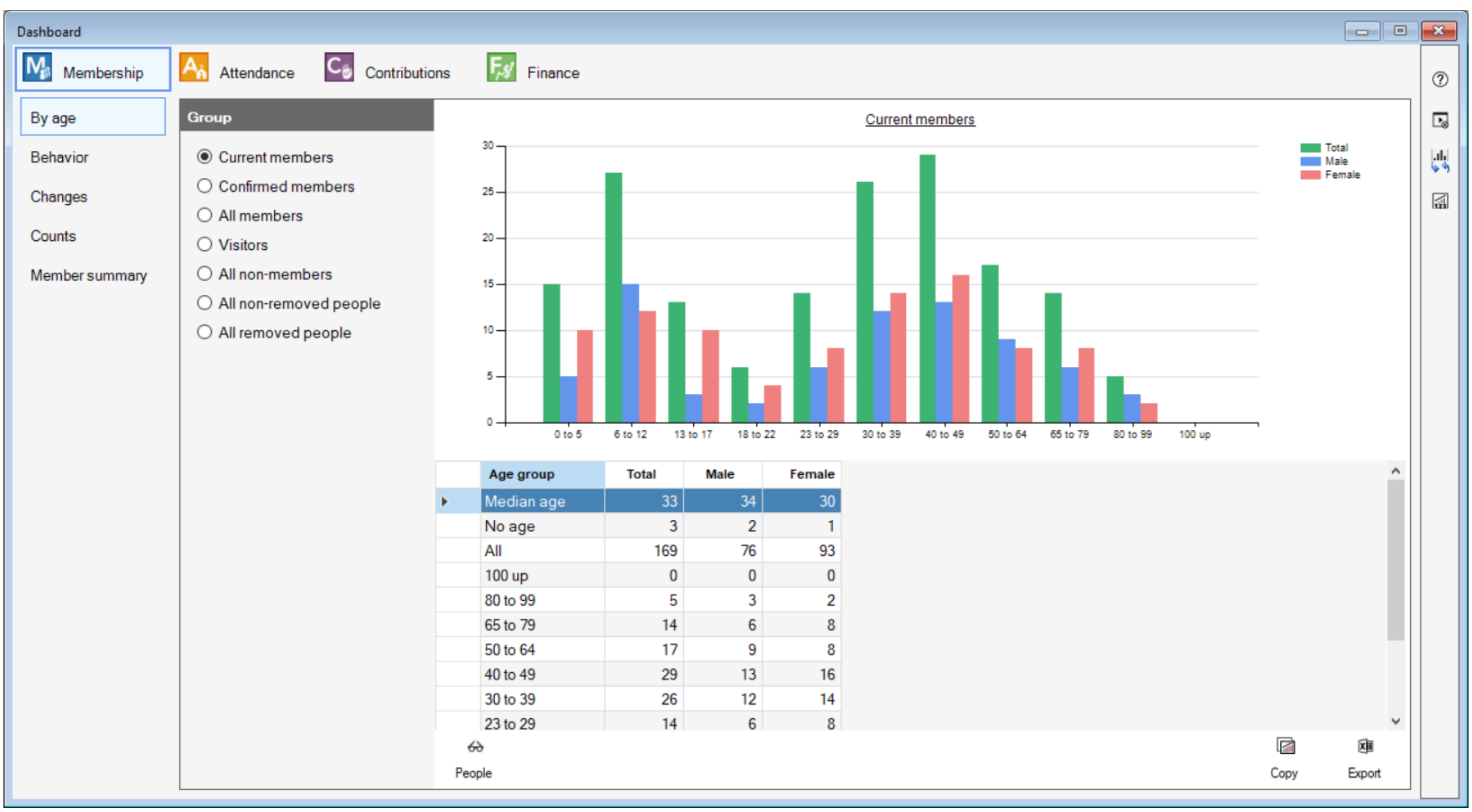

| Age group | Total | Male | Female |
|---|---|---|---|
| Median age | 42 | 26 | 17 |
| No age | 1 | 1 | 0 |
| All | 163 | 73 | 90 |
| 100 up | 0 | 0 | 0 |
| 80 to 99 | 3 | 3 | 0 |
| 65 to 79 | 13 | 5 | 8 |
| 50 to 64 | 14 | 7 | 7 |
| 40 to 49 | 29 | 14 | 15 |
| 30 to 39 | 24 | 11 | 13 |
| 23 to 29 | 20 | 9 | 11 |

# Membership Dashboard

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

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

- People—Shows the specific people for the selected field within the selected section.
- View—Opens the person record of the selected person.
- Copy—Copies the graph within the selected section to the Windows clipboard.
- Export—Sends the data within the selected section to your spreadsheet program.
- Subgroup—Creates a Static subgroup from the people in the selected section.



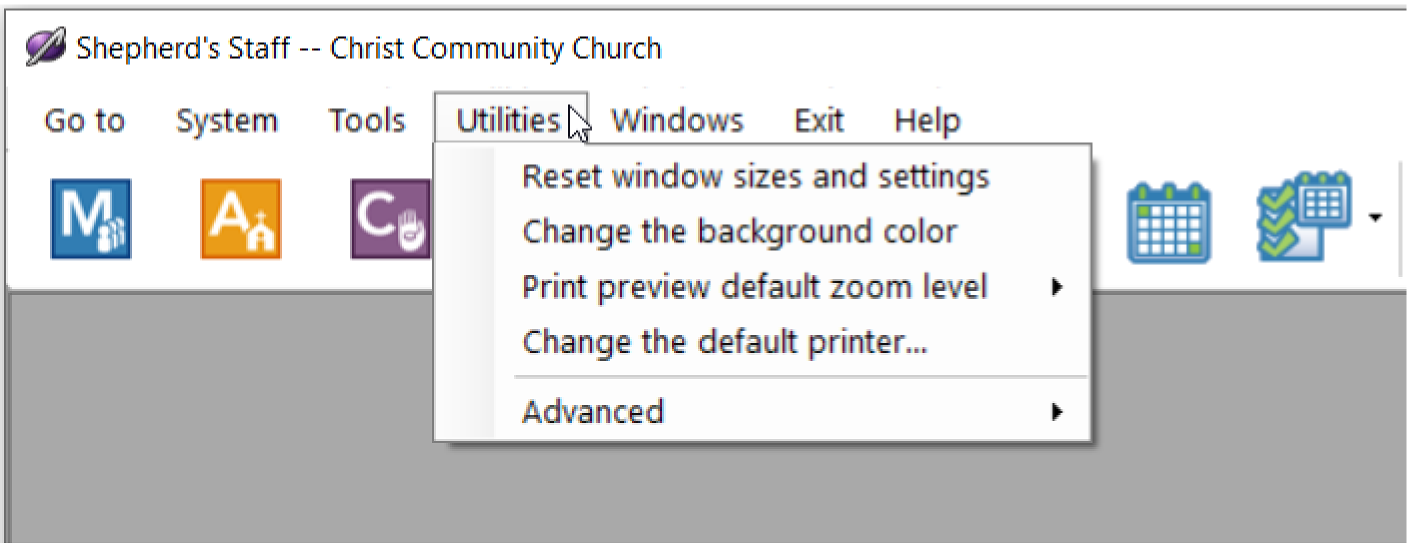

Each tab provides different sets of data based on data from person, household, attendance and contributions data.

- By Age - This tab provides a breakdown by age of different groups. You can select which group you'd like to review by clicking the radio button next to that group. You will then see a graph with three data points per age group: Number of males in the age group, number of females in the age group, and total number of people in the age group. Below the graph, you will see a table that provides you with the Median age, of males, females and the total number of people as well as numbers for males, females and all people within each age group.
- Behavior - This tab provides breakdown of activity (or inactivity) information based on the time period you select for the group you select. First, set the time period you'd like to look at by selecting it from the "For the past" drop-down list. Then, select which group of people you'd like to look at by clicking the radio button next to that group. You will then see two graphs to the right with activity and inactivity information. The activity graph will show numbers on the total number of people in that group, how many of that group attended, communed and gave. The inactivity graph to the right will show the total number of people in the group, and the number of people in that group who did not attend, commune or give. Below each of these graphs, there is a corresponding chart that provides the count and percentage for each data point on the graph.
- Changes - This tab provides a breakdown of changes that have occurred in your congregation, such as receiving and removing members, baptisms, confirmations and first communions over the time period you select. First, set the time period you'd like to look at in the "Changes" drop-down list. Then, you can select what change you want to track by clicking on the radio button next to that option. You will then be presented with a graph that will show the number of changes per month within the time period. Below the graph, you will see a listing of each person that the particular change was made on within that time period.
- Counts - This tab provides a listing of people or households within particular groups. First, select the group of people (under the people heading) or households (under the households) heading you'd like to look at. The number of people or households within that particular group will be listed to the right of each option. To the right of the option selection, you will see the listing of people or households within that group, along with basic information on those people or households.
- Member Summary - This tab provides you with summary information on your membership for the current and previous years. This tab is good for seeing totals of your baptized and confirmed members within a particular year, as well as seeing the numbers of gains and losses of your baptized and confirmed members. Previous years figures can also be edited by clicking on the line you'd like to edit and clicking "Edit" (The current year cannot be edited, as it updates automatically as changes are made within the current year). This would need to be done if you add (or remove) a person to your system who was received (or removed) in a prior year, but not added to or removed from Shepherd's Staff until your current fiscal year. You can also add Member Summaries for years prior to the start of using Shepherd's Staff if you have that information by clicking the "Add" button at the bottom of the chart. You can also delete a member summary by clicking on it, and clicking the "Delete" button at the bottom of the chart.

# Customizing Membership

## Overview

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




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

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

» Zoom Level when Previewing Reports—You can select the zoom level of a report's print preview under **Utilities>Print Preview Default Zoom Level**. You will see a drop-down where you can select from various zoom levels.

» Change Default Printer—To change the default printer Shepherd's Staff sends reports to, go to **Utilities** and click **Change the Default Printer**. This will give you a Print setup box that will allow you to select the printer you want to use.

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

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

# Search and Filter

## Overview

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

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

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

## These are the special characters you can use in searches:

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

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

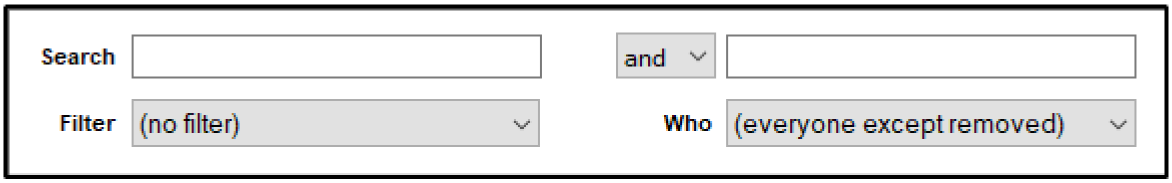
» Less than (**<**)—Putting **<** before a search value searches for values less than the one you type in. Example: **<12/01/2017** searches for dates before December 1, 2017.

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

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

» Like (%)—Entering a search with **%** followed by a value (ex. %value) lets you search for results that *end* with that value.  Similarly, entering a value then adding **%** at the end (ex. value%) will find any results *beginning* with that value.

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




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

## Here is how to use the search and filters:

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

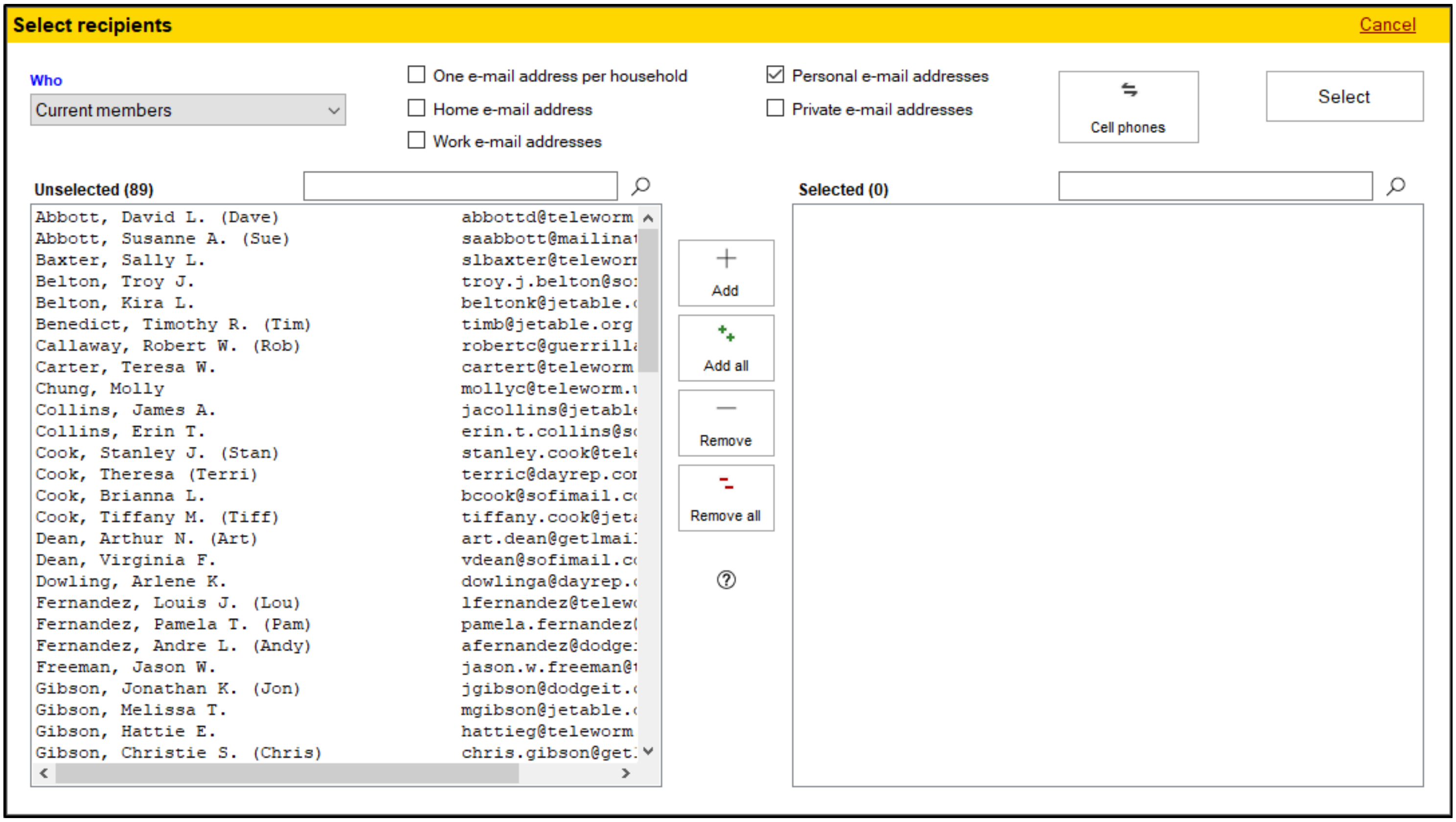
# Sending Emails

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

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

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

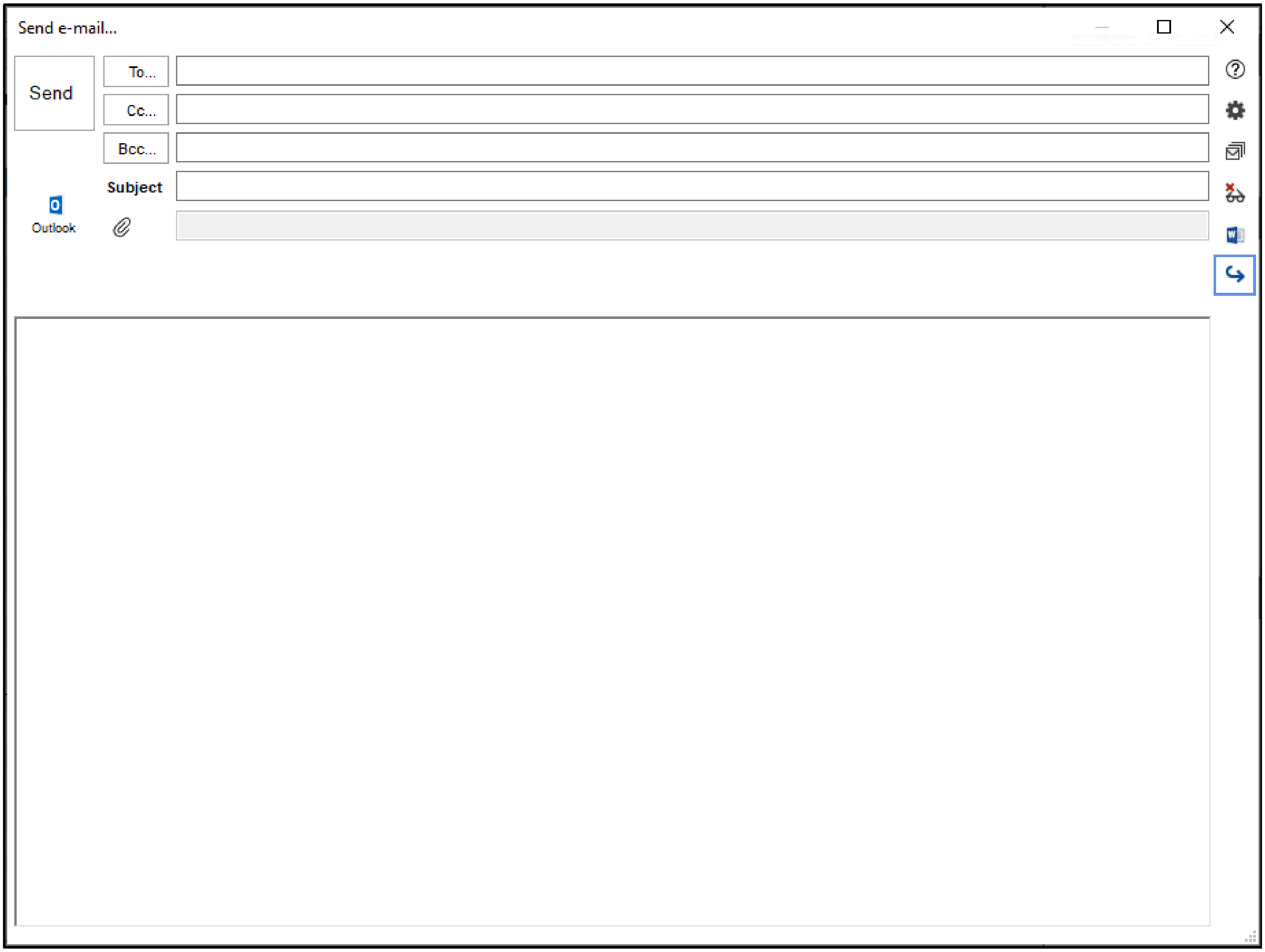
You can follow the same steps in the "CC..." and "BCC" boxes to set up a Carbon Copy or Blind Carbon Copy for your email.




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

1. Fill in the Subject line of your Message in "Subject"
2. Click the Attachments button (Paper Clip) to open the Add Attachment(s) window. In this window, you can add attachments to your email. Click the add button (Paperclip with a green + sign) to open your file explorer. You can then browse your computer and select the file you want to add by double clicking on it. To remove an attachment, select it in the "Attachments selected window" and click the remove button (Paperclip with a red x) to remove the selected file. You can click the button with two red minus signs to remove all attached files
3. Click the Save icon to add your attachments to your email.
4. On the right, you'll see a button that looks like the Microsoft Word logo. You can click this to open Microsoft Word, if you would prefer to write your email message there. This would give you the ability to take advantage of the formatting options Microsoft Word provides, including inserting images. After you finish writing your message in Word, save it, and then, you can use the button below the Word icon to import your saved Word document in as the body of your message. Clicking this button will bring up a file explorer window where you can find and import your file.
5. Type in your message in the message box and press Send to send your email to your email client. Within your email client, you will need to press the Send button to send the message.

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

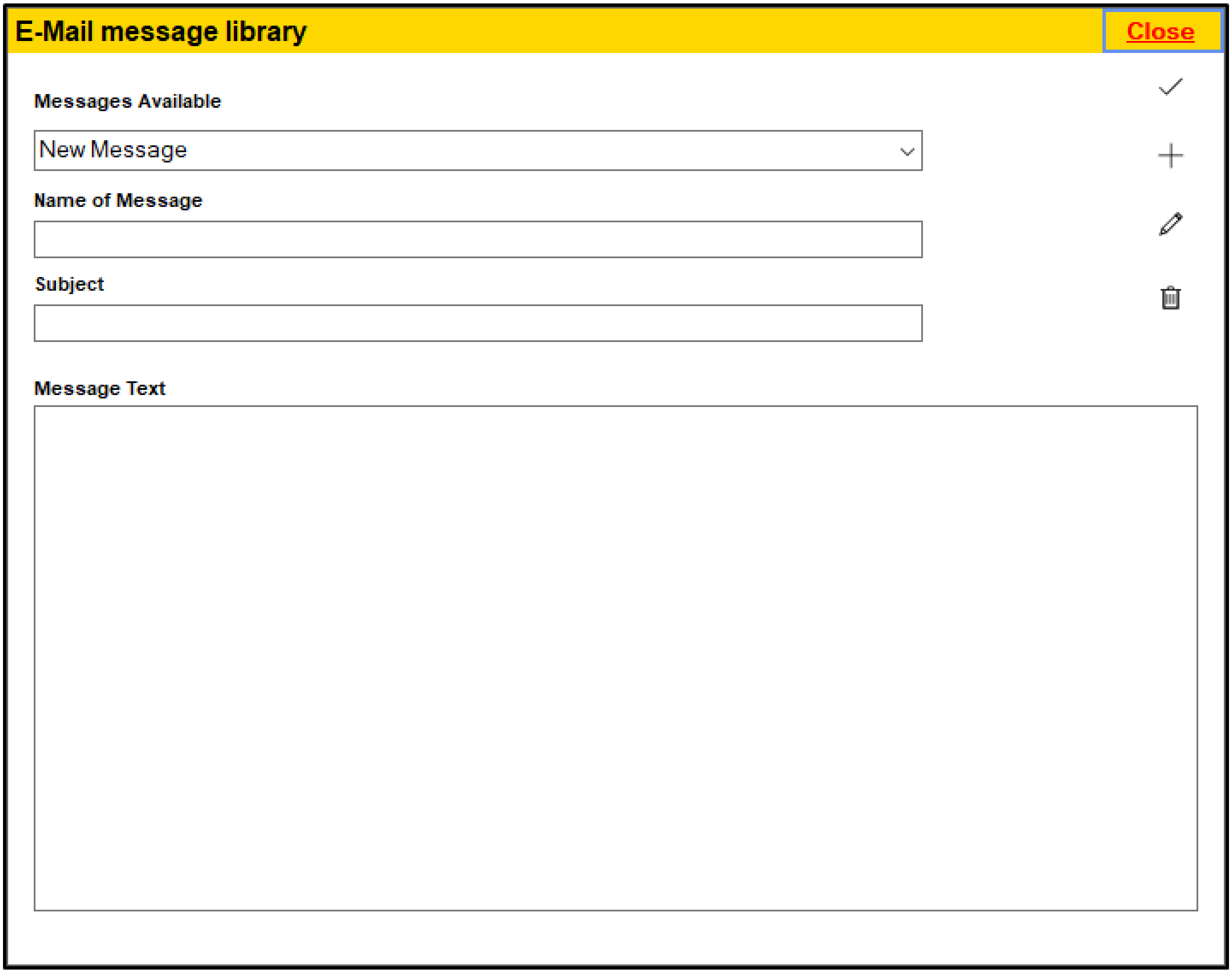



You may also want to create templates for messages that you plan to send out frequently. For this, we offer a message library.

1. Access the Message Library by pressing the button to the right of the BCC field with the multiple envelopes stacked on top of each other
2. Click the + sign in the next window to add a new message.
3. Type in the name of your message in the Name of Message field. When you save your message, this is what the message will show up as in the "Messages Available" field. Then, fill in the Subject and Message Text. When finished, click the save icon. This will add the message to the Messages Available field.

4. To delete a saved message, select it in the "Messages Available" field and click the delete icon (Trash Can) to delete the message.

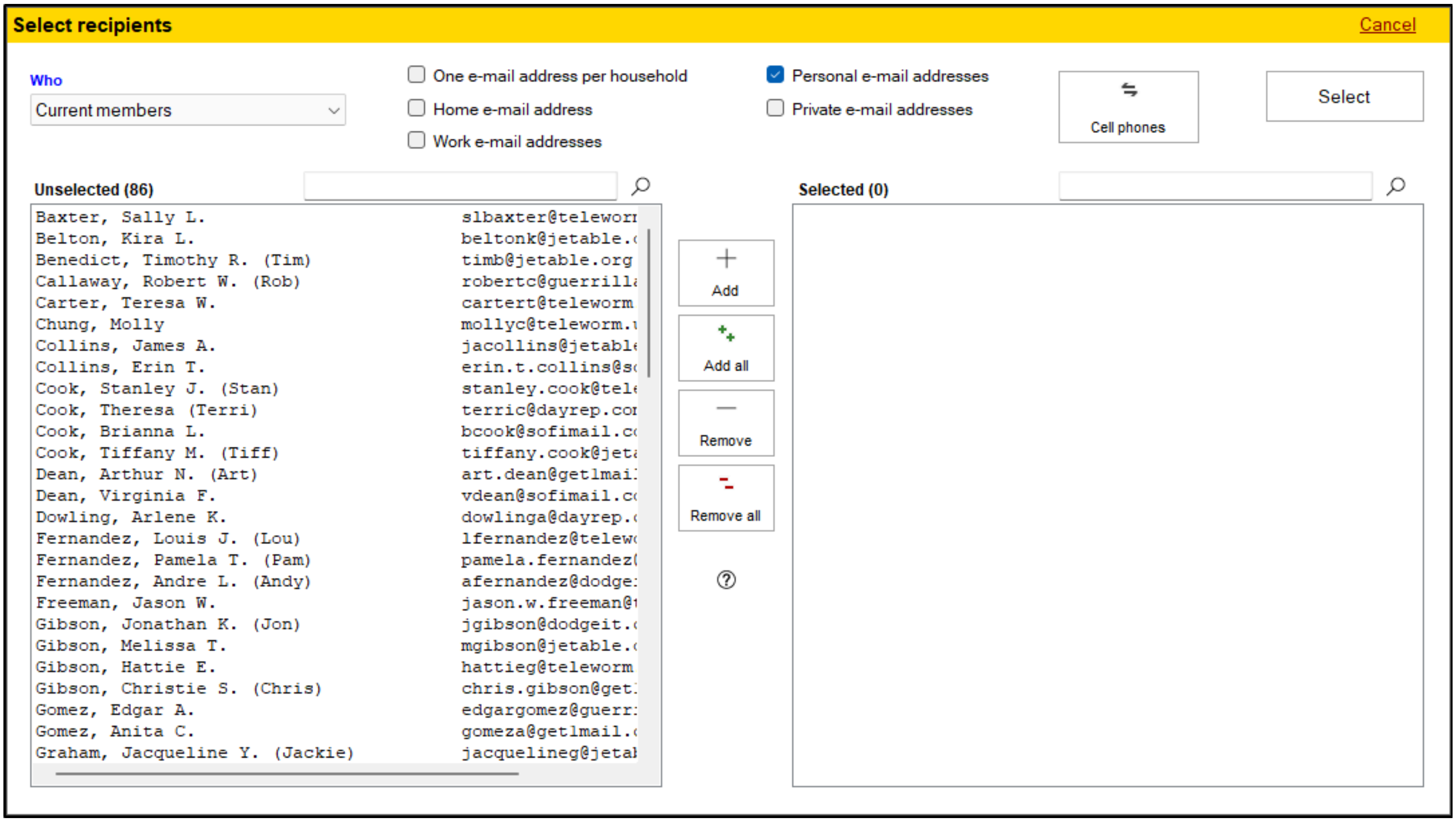
5. After you have selected your message, click the box with the checkmark in it to use that message for your email message.



# Selecting Email Recipients

When you are writing an email, you'll need to decide who you will be sending the email to. Shepherd's Staff provides an easy way to pick multiple people or groups of people all at once to send your emails to once you start writing your email. The steps below will help you get to and use the "Select Recipients" window.

1. When sending an email, in the "To:" line, click the button at the start of the line that says: "To..."
2. In the window that appears, you can select the group of people you want to work with in the "Who" field.
3. Select from the listed options to filter which people and emails you see in the "Unselected" box. These checkboxes include "One e-mail address per household", "Home e-mail address", "Work e-mail addresses", "Personal e-mail addresses" and "Private e-mail addresses". You can select any combination of options you want here.
4. The "Cell phones" button will shift to letting you send emails to generate text messages. You do need the cell phone number listed on the person's profile you want to send to, and you also need to have their cell phone provider listed in order to send them text messages.
5. In the Unselected box, click on the person you want to add, and then press the Add button. If you want to select multiple people at once, hold down the CTRL key on your keyboard as you click on each person. To add all people in the Unselected box, click the "Add all" option. To search for a specific person, type in the person's name in the search box above the Unselected box and press the search button (Magnifying Glass)
6. To remove people from your selected box and click Remove. If you want to select multiple people at once, hold down the CTRL key on your keyboard as you click on each person. To remove all people from the Selected box, click "Remove all". to search for a specific person, type in the person's name in the search box above the Selected box and press the search button (Magnifying Glass)
7. Click Select to confirm your selections.


Select recipients
Cancel
Who
Current members
One e-mail address per household
Home e-mail address
Work e-mail addresses
Personal e-mail addresses
Private e-mail addresses
Cell phones
Select
Unselected (86)
Selected (0)
Baxter, Sally L. slbaxter@teleworn
Belton, Kira L. beltonk@jetable.
Benedict, Timothy R. (Tim) timb@jetable.org
Callaway, Robert W. (Rob) robertc@guerrill
Carter, Teresa W. cartert@teleworm
Chung, Molly mollyc@teleworm.
Collins, James A. jacollins@jetable
Collins, Erin T. erin.t.collins@s
Cook, Stanley J. (Stan) stanley.cook@tele
Cook, Theresa (Terri) terric@dayrep.co
Cook, Brianna L. bcook@sofimail.c
Cook, Tiffany M. (Tiff) tiffany.cook@jet
Dean, Arthur N. (Art) art.dean@getlmai
Dean, Virginia F. vdean@sofimail.c
Dowling, Arlene K. dowlinga@dayrep.
Fernandez, Louis J. (Lou) lfernandez@telew
Fernandez, Pamela T. (Pam) pamela.fernandez
Fernandez, Andre L. (Andy) afernandez@dodge
Freeman, Jason W. jason.w.freeman@
Gibson, Jonathan K. (Jon) jgibson@dodgeit.
Gibson, Melissa T. mgibson@jetable.
Gibson, Hattie E. hattieg@teleworm
Gibson, Christie S. (Chris) chris.gibson@get
Gomez, Edgar A. edgargomez@guerr
Gomez, Anita C. gomeza@getlmail.
Graham, Jacqueline Y. (Jackie) jacquelineg@jeta
Add
Add all
Remove
Remove all

# Introduction to Subgroups

## Overview

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

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

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

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

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

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

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

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

» Reports—This view is unavailable at this time and will be available in a future release of Shepherd's Staff.

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

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

# Here is how to use Subgroups:

1 Subgroups can be accessed by clicking on **Subgroups** in the menu bar or by clicking the **Subgroups icon** in the toolbar.

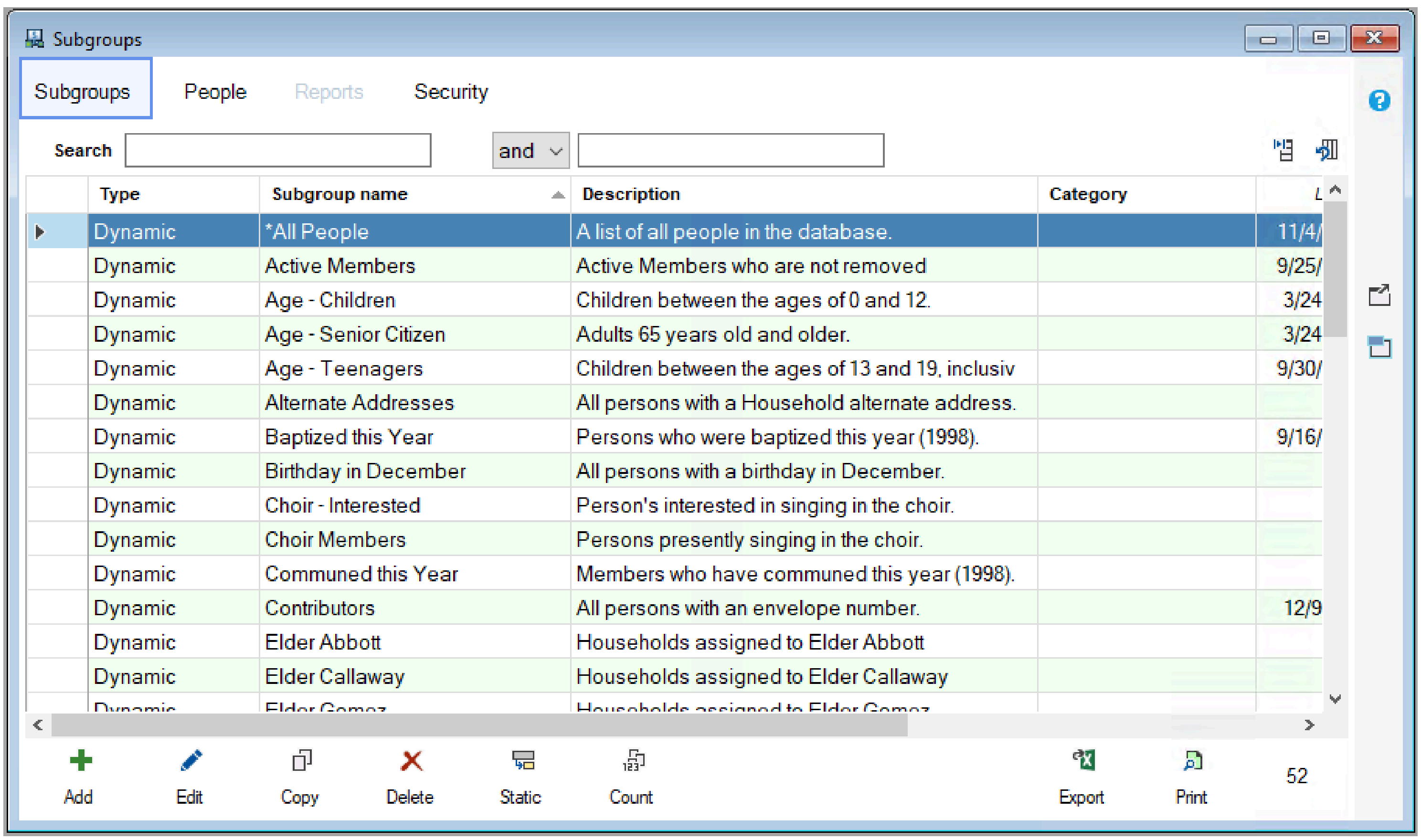
2 From this window, you can add, edit, and delete Subgroups.

3 Click **Count** to quickly see the number of people and households in the Subgroup.

4 Click **Labels** to open mailing labels with the selected Subgroup applied.

5 Click **Preview** to show a report of the people in the Subgroup and some basic information. You can also click **Print** to print the report.

6 Click the **Export** button to export a list of all the Subgroups. If you want to export the list of people within a Subgroup, **select the Subgroup** and then click on the **People tab**, which will give you the export option you need.

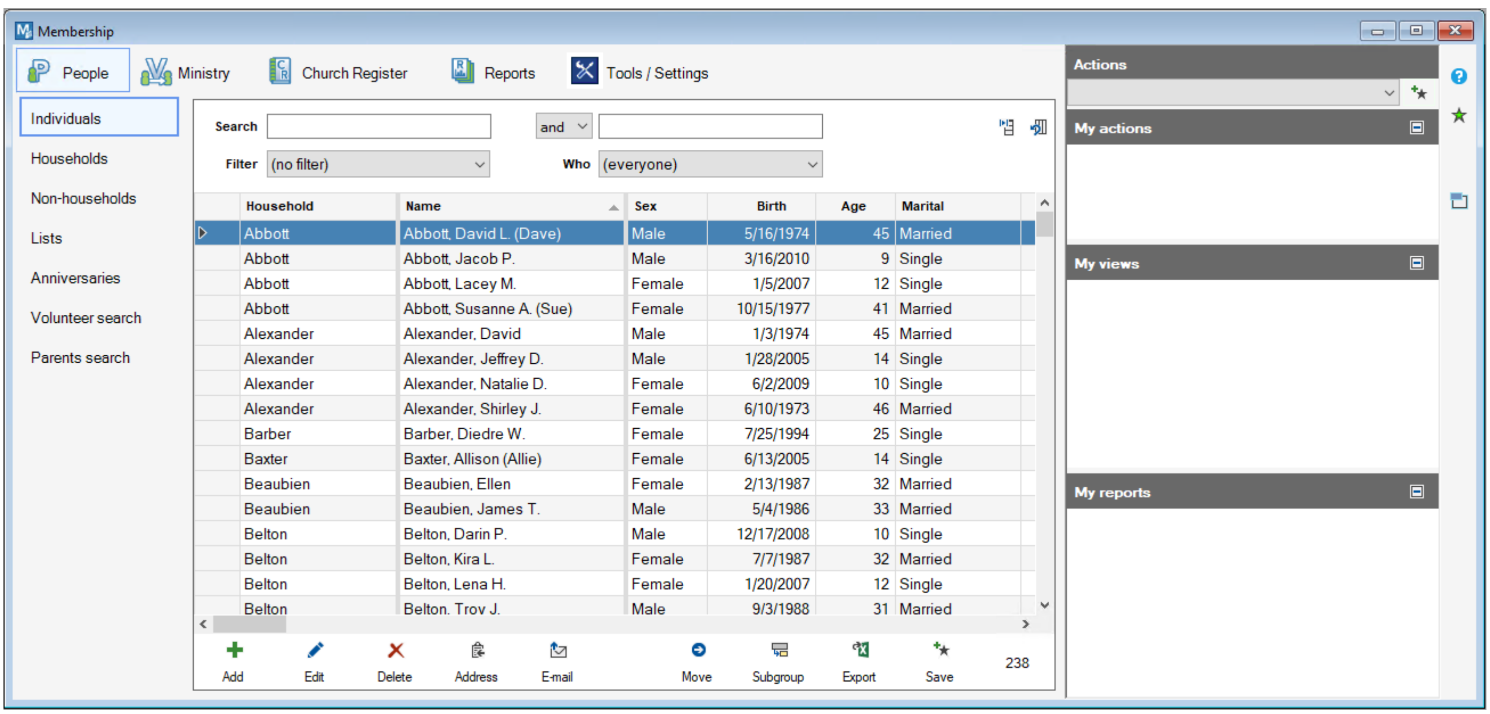


# The People Grid

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

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

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

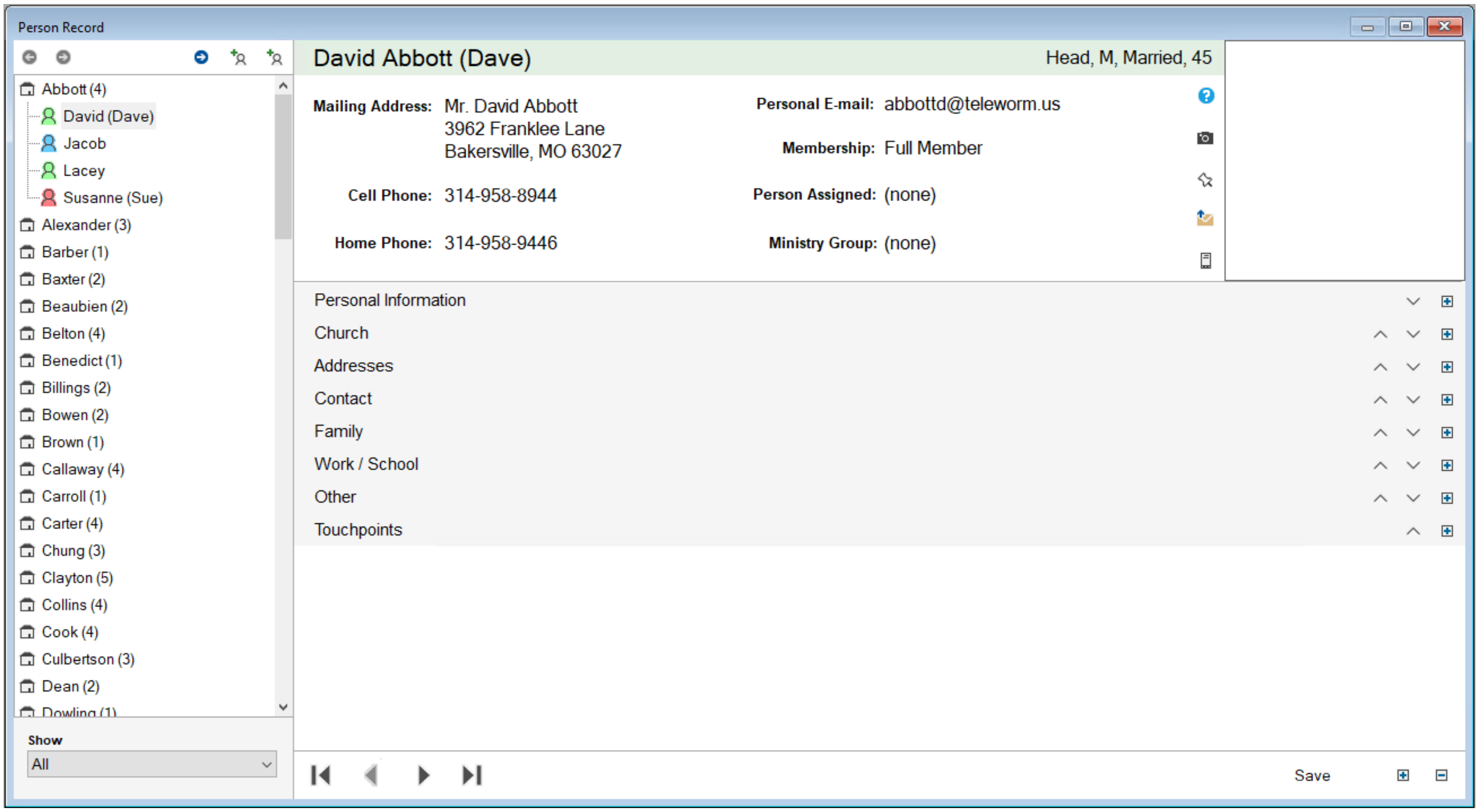


# Person Records

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

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

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


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

# Add Person

There are two different ways to add person records:

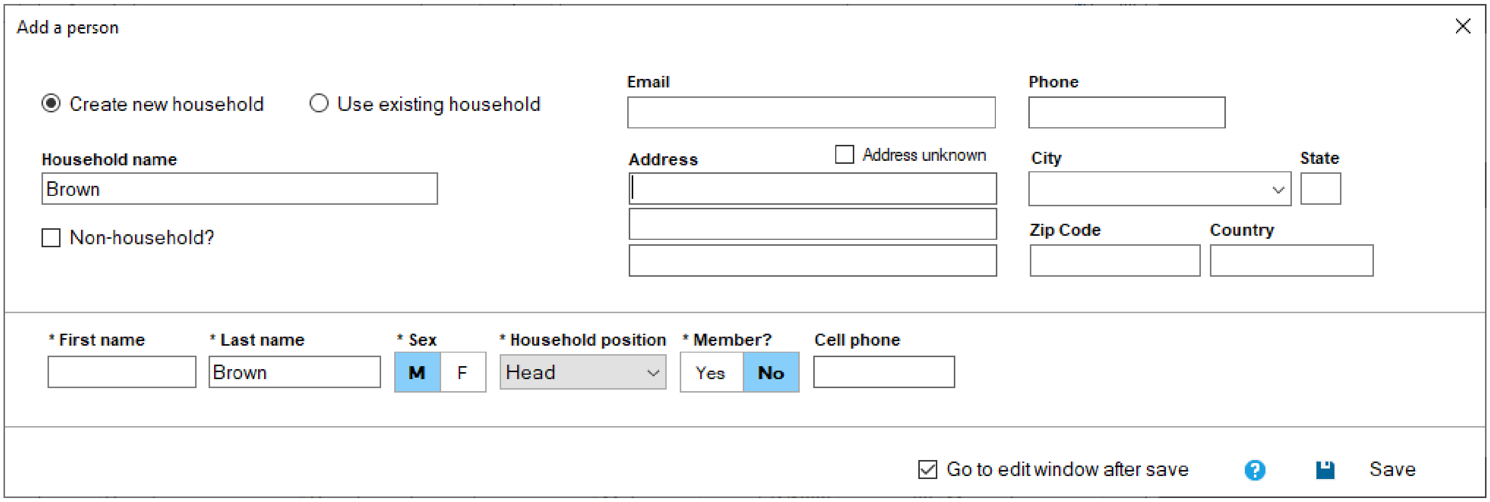
» Go to the Individuals Grid and click the Add button

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

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

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

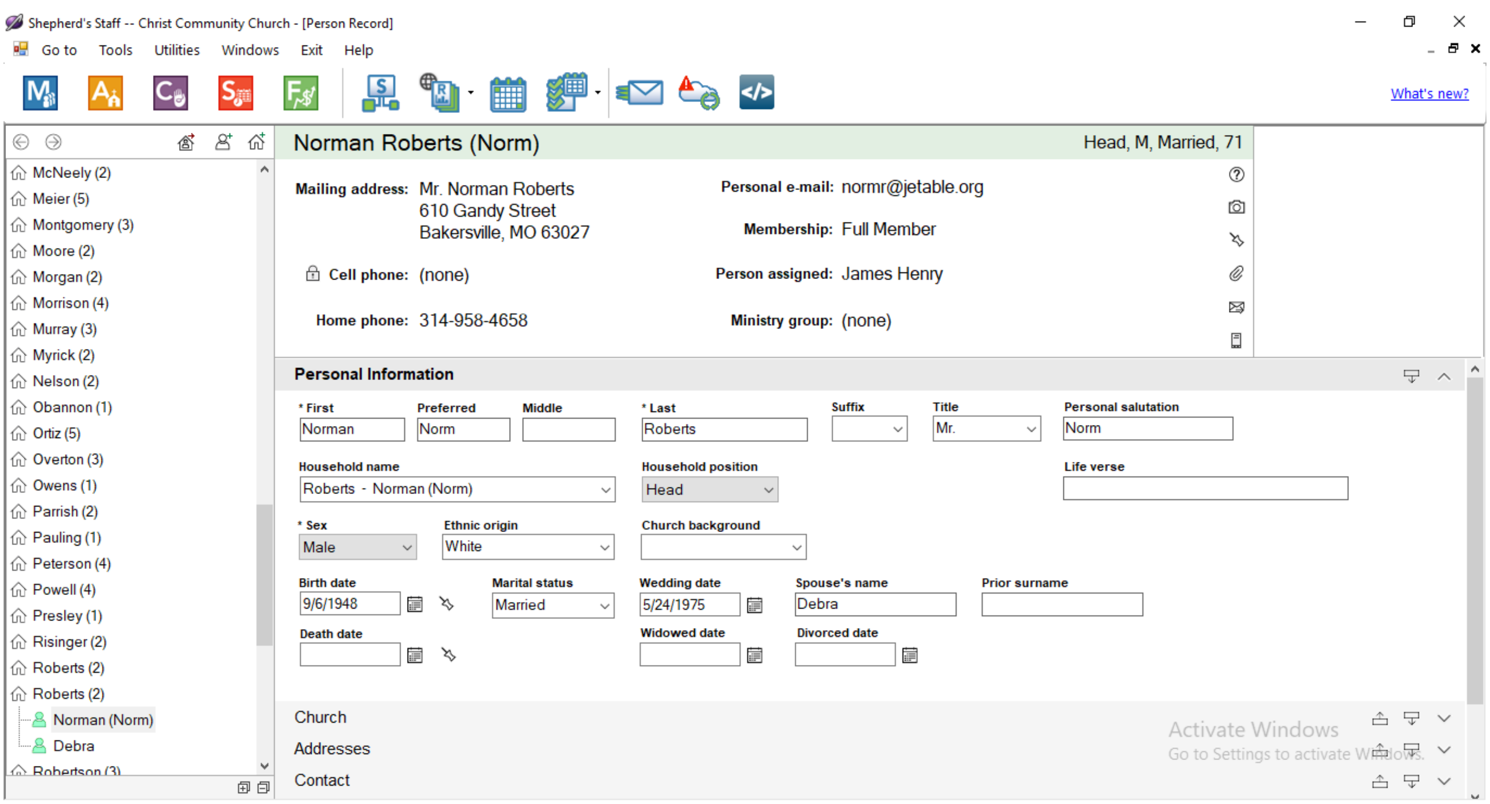
1. Click the "Add" button on the people grid to add a new person. The "Use existing household" option will be selected by default from this window.
2. Select the household the person you are adding belongs to in the "Household name" field
3. Fill in the First name, Last name, Sex, Household position,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


Add a person
Create new household
Use existing household
Email
Phone
Household name
Brown
Address
Address unknown
City
State
Non-household?
Zip Code
Country
* First name
* Last name
Brown
* Sex
M
F
* Household position
Head
* Member?
Yes
No
Cell phone
Go to edit window after save
Save

# Personal Information Tab

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

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



# Church Tab

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

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

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

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

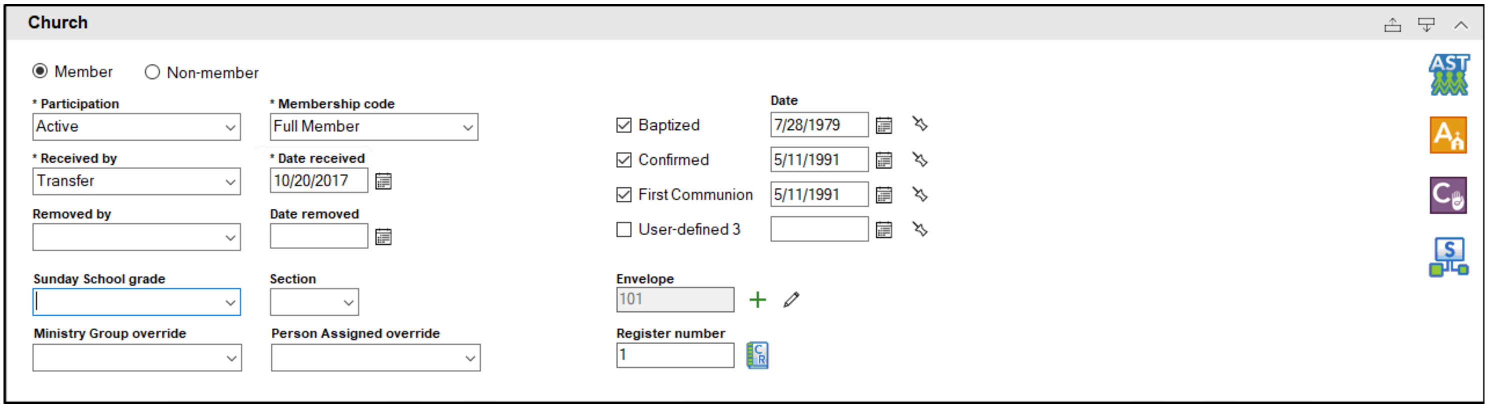
In addition, If you add a new person who was received by Baptism or Confirmation, the associated date will fill in with the date on which the person was received.

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

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

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

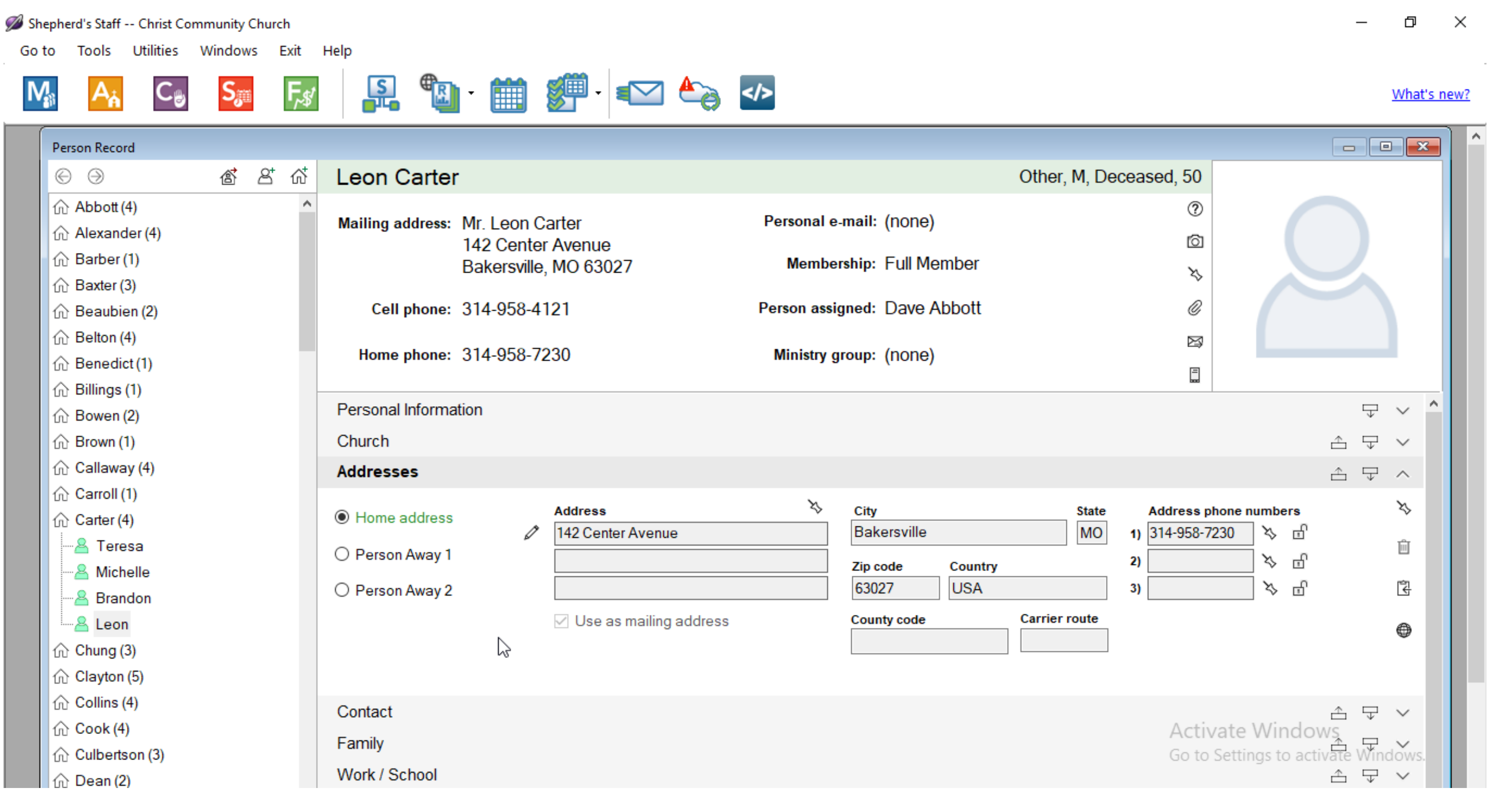
At the far right of the Church tab, you'll see four buttons. The first button, labeled AST, when clicked will bring up a window that shows all activities, Skills, Spiritual Gifts and Training Classes for that person. You can print a list of these items from the window that appears. The next button, labeled with an A, will bring up a window with a list of attendance summaries for all the years you have recorded attendance for this person. The next button, labeled with a C will open the contributor record for that person, and finally, the last button, labeled with an S, will bring up a window that will list all Subgroups that this person is a part of.


Church
Member
Non-member
* Participation
Active
* Membership code
Full Member
* Received by
Transfer
* Date received
10/20/2017
Removed by
Date removed
Sunday School grade
Section
Ministry Group override
Person Assigned override
Date
Baptized
7/28/1979
Confirmed
5/11/1991
First Communion
5/11/1991
User-defined 3
Envelope
101
Register number
1
AST

# Person Addresses Tab

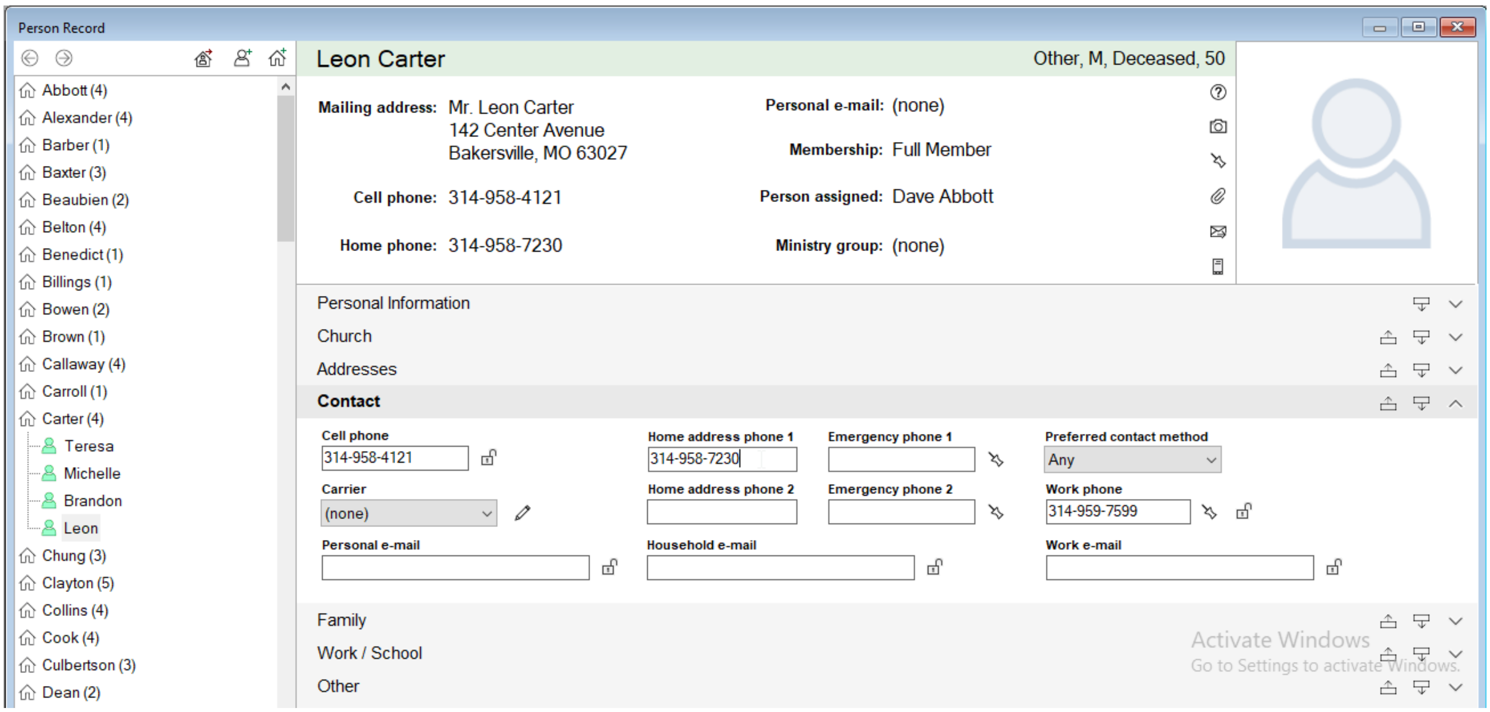
The Person Addresses Tab shows the address that the person currently resides at. There are three address options that will appear in this window, Home Address, Person Away 1, and Person Away 2. The first address option, Home address, cannot be edited in this window, as it is inherited from the household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

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



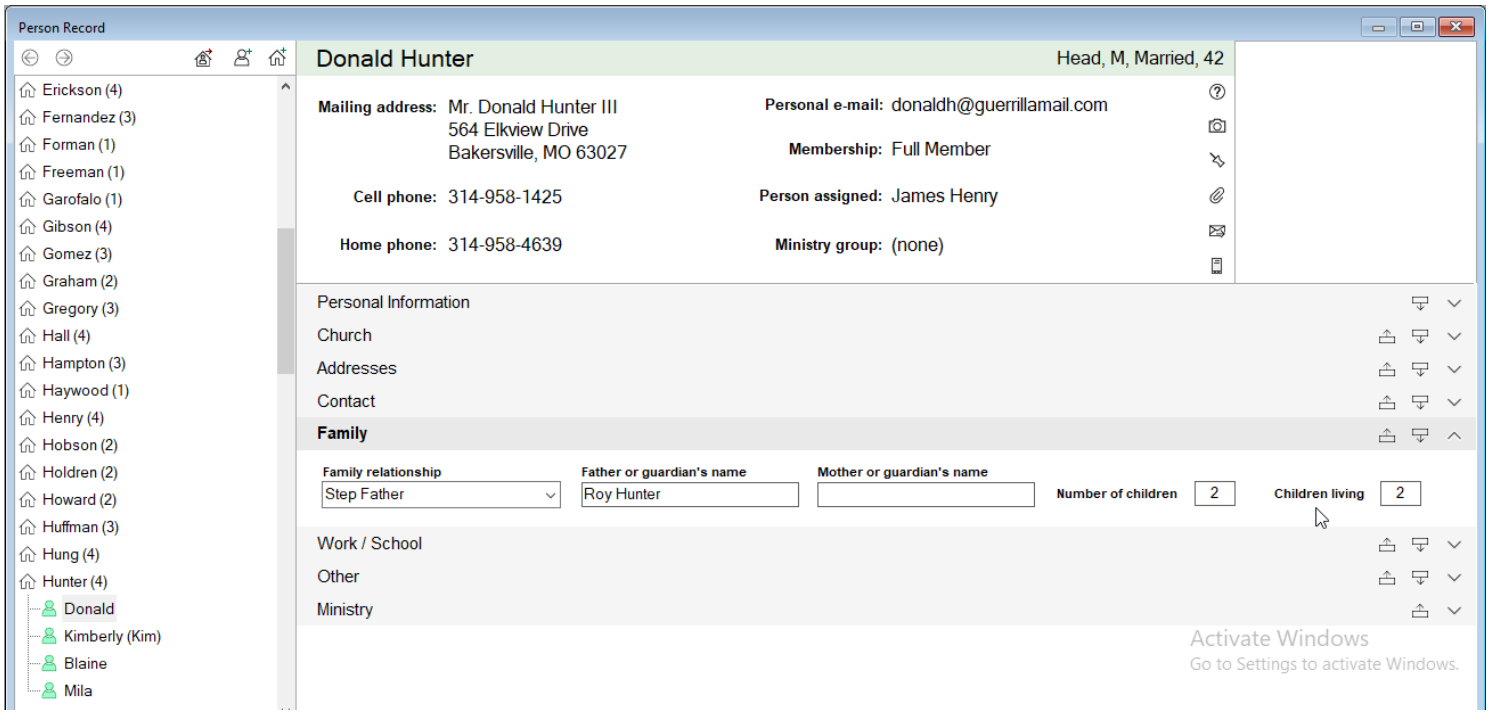
# Person Contact Tab

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



# Family Tab

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



# Work/School Tab

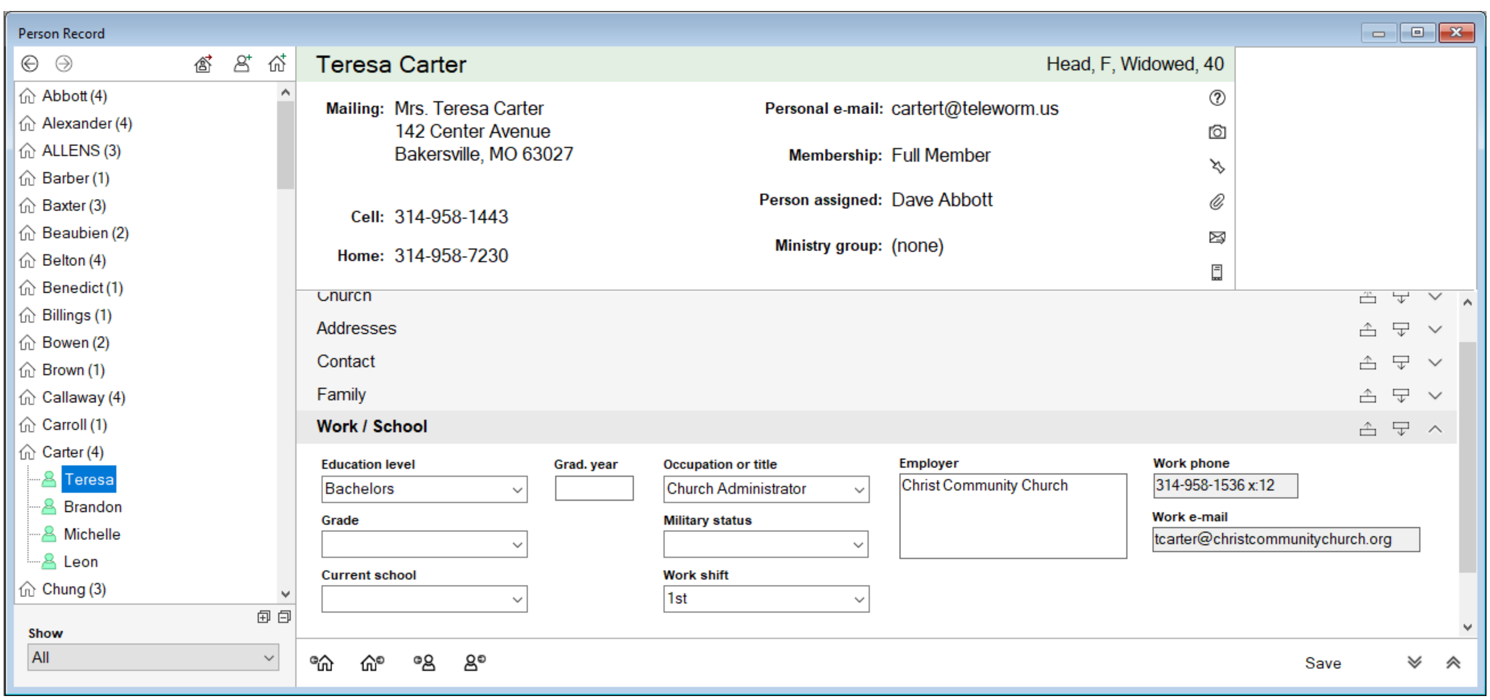
As the title suggests, the Work / School tab keeps track of the person’s work and school information.

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

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

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

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

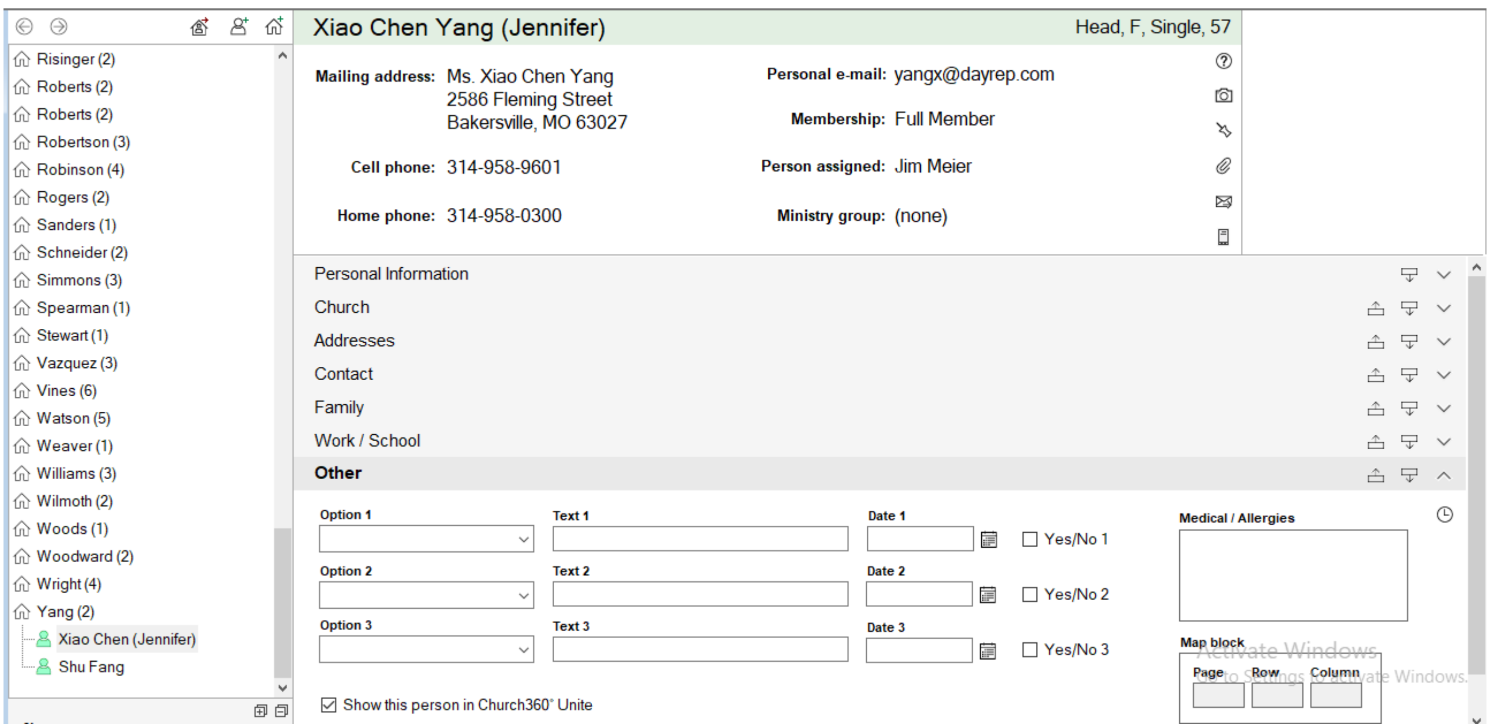


# Person Other Tab

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

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

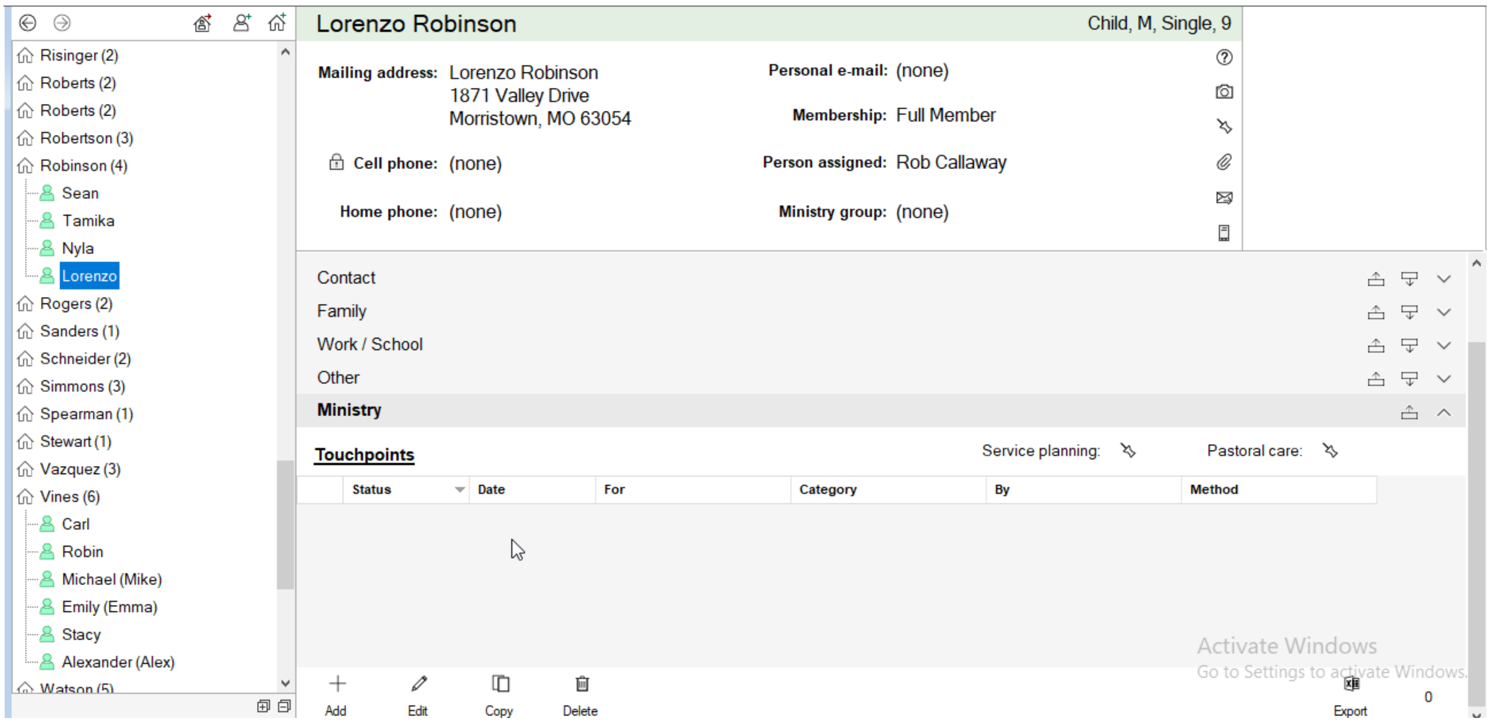
In order to change the names of these fields you will need to go to Tools/Settings menu in Membership and edit the names in the Customize field names section.



# Ministry Tab

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

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

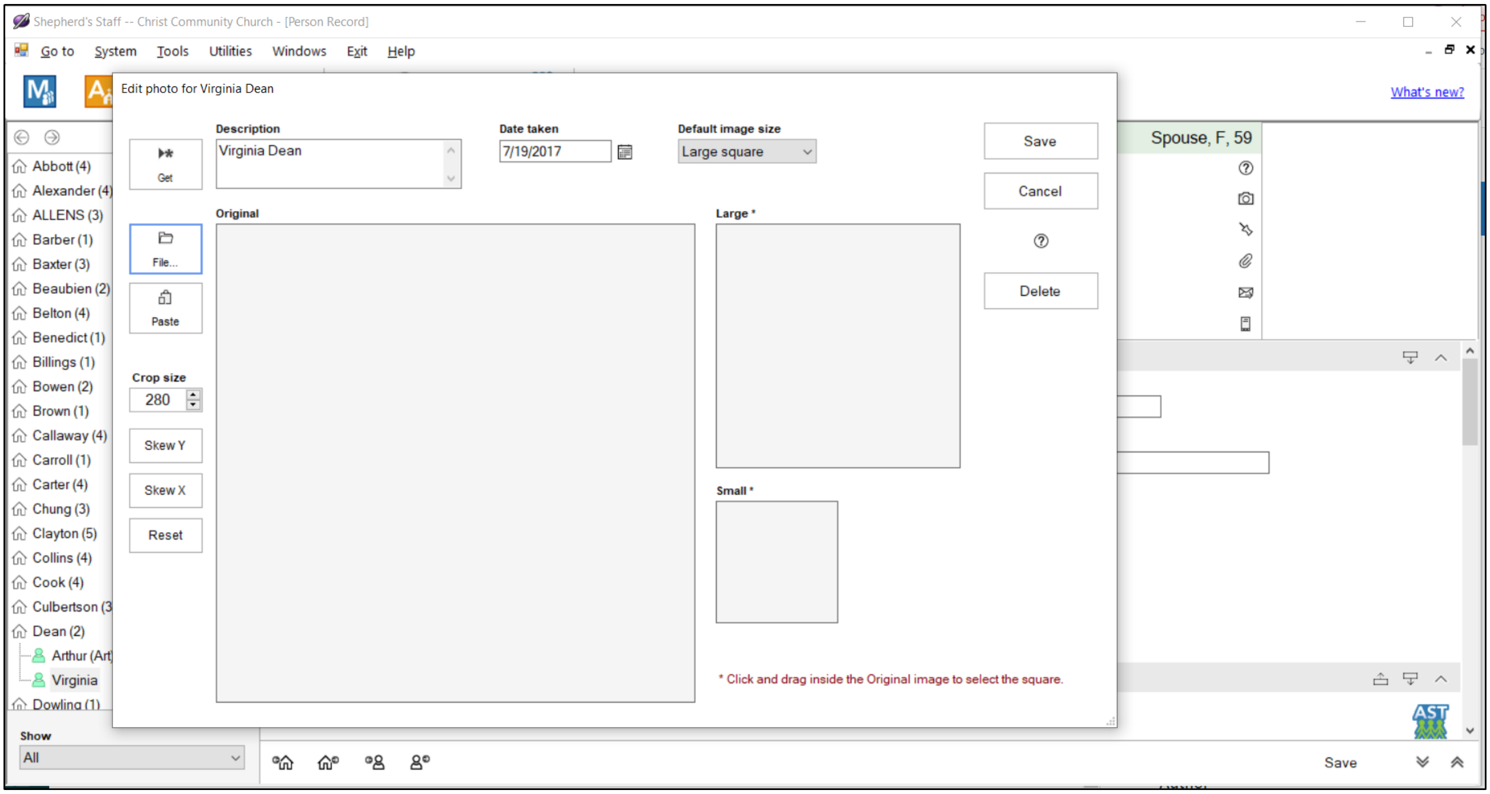


# Add an Individual Photo

You can add a photo to an Individual record in Membership. This will allow you to print photo directories, and to have an at-a-glance record to help you tie names and faces together. It's a great feature for larger congregations, and to get to know new members.

To add a photo to an Individual record, in the Membership module, go to the Individuals grid.

1. Select the Individual in question and either double-click, or click the Edit button at the bottom of the grid to open the record for editing.
2. Once in the individual record, you have two choices to get to the Photo Manager in the top section with the overview of the Individual's details.
    1. You can either click the camera icon in the list of icons toward the right side of the record.
    2. Or you can click in the big box to the right of that icon, which is where the image will display once you've added it.
3. Either of those options will bring up the "Edit Photo" box.
4. The "Get" button will pull a description from the record you were in when you clicked to open the box. This will likely already be filled in by default.
5. The "File" button is where you will click to browse to the location of the image file you want to add, or if you have copied it, you can use the paste button.
6. Once the image is there you can click and drag in the box marked "Original" and/or crop it using the options on the left until it is centered and looks right in the "Large" and "Small" boxes.
7. Click Cancel if you change your mind or Save to save your changes.
8. The Delete button is available to remove an image as needed.


Shepherd's Staff -- Christ Community Church - [Person Record]
Go to
System
Tools
Utilities
Windows
Exit
Help
What's new?
Edit photo for Virginia Dean
Description
Virginia Dean
Date taken
7/19/2017
Default image size
Large square
Save
Cancel
Delete
Get
File...
Paste
Original
Large *
Small *
Crop size
280
Skew Y
Skew X
Reset
* Click and drag inside the Original image to select the square.
Spouse, F, 59
Abbott (4)
Alexander (4)
ALLENS (3)
Barber (1)
Baxter (3)
Beaubien (2)
Belton (4)
Benedict (1)
Billings (1)
Bowen (2)
Brown (1)
Callaway (4)
Carroll (1)
Carter (4)
Chung (3)
Clayton (5)
Collins (4)
Cook (4)
Dean (2)
Virginia
Show
All
Save

# Households and People

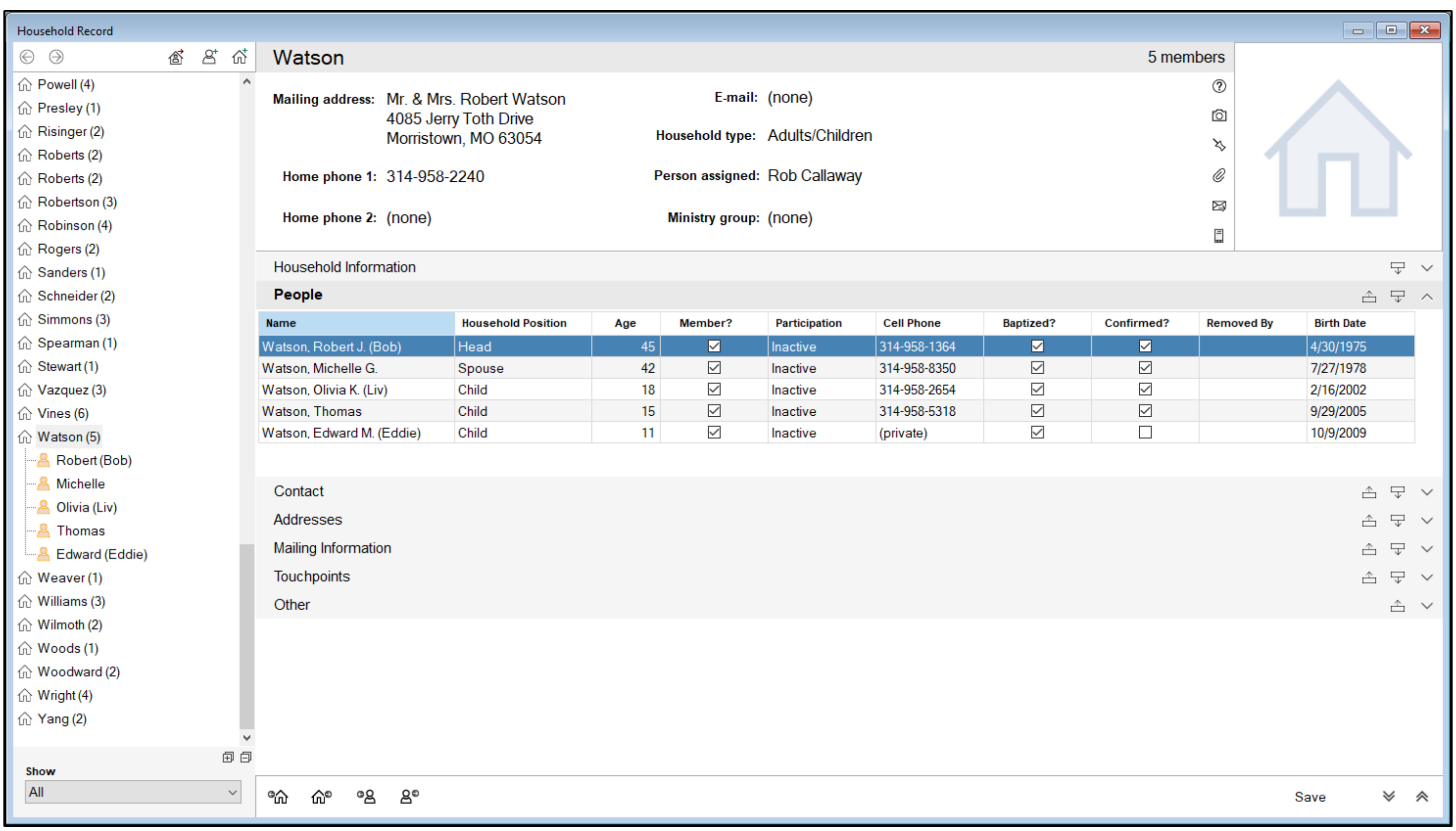
The Membership Module is based around two different types of records: Households and People. It is important to understand the differences between them and how they relate to each other.

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

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

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

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

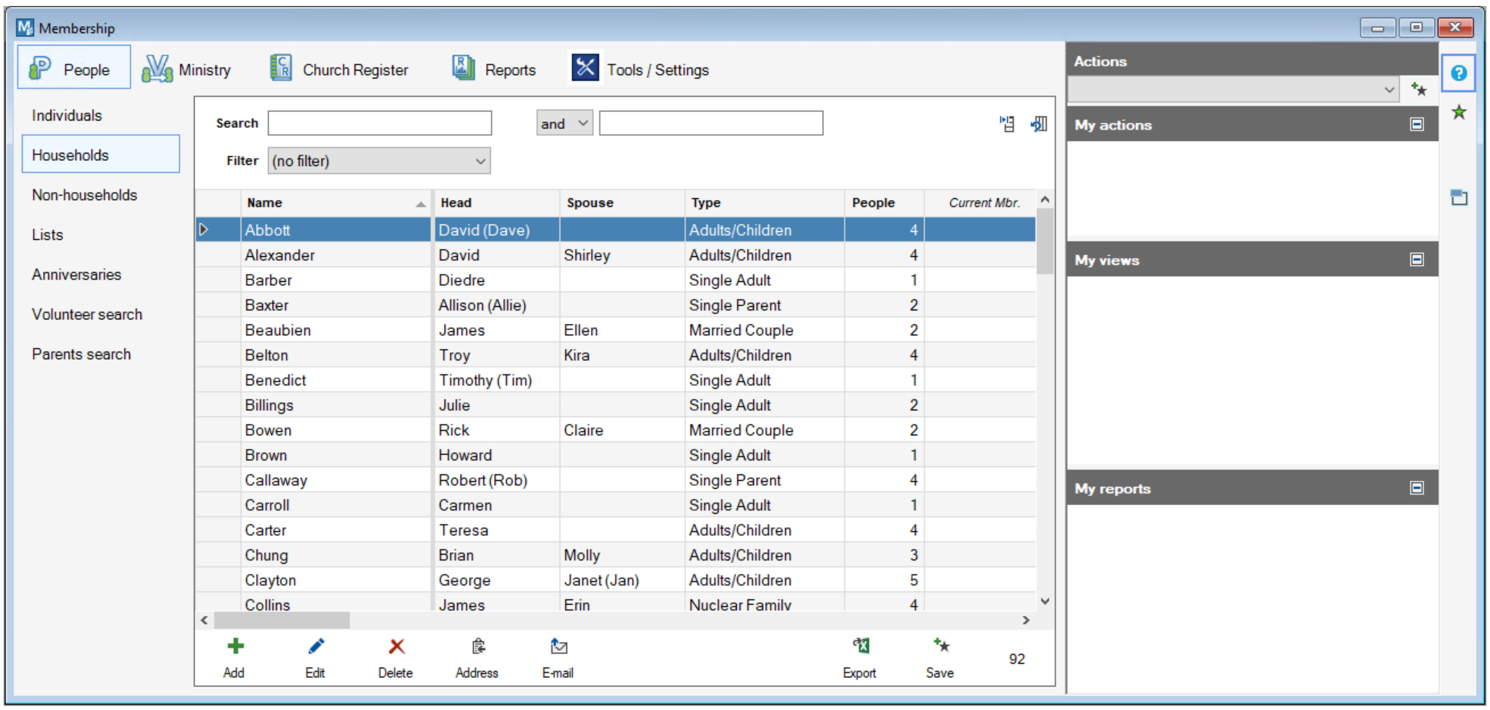


# The Households Grid

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

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

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

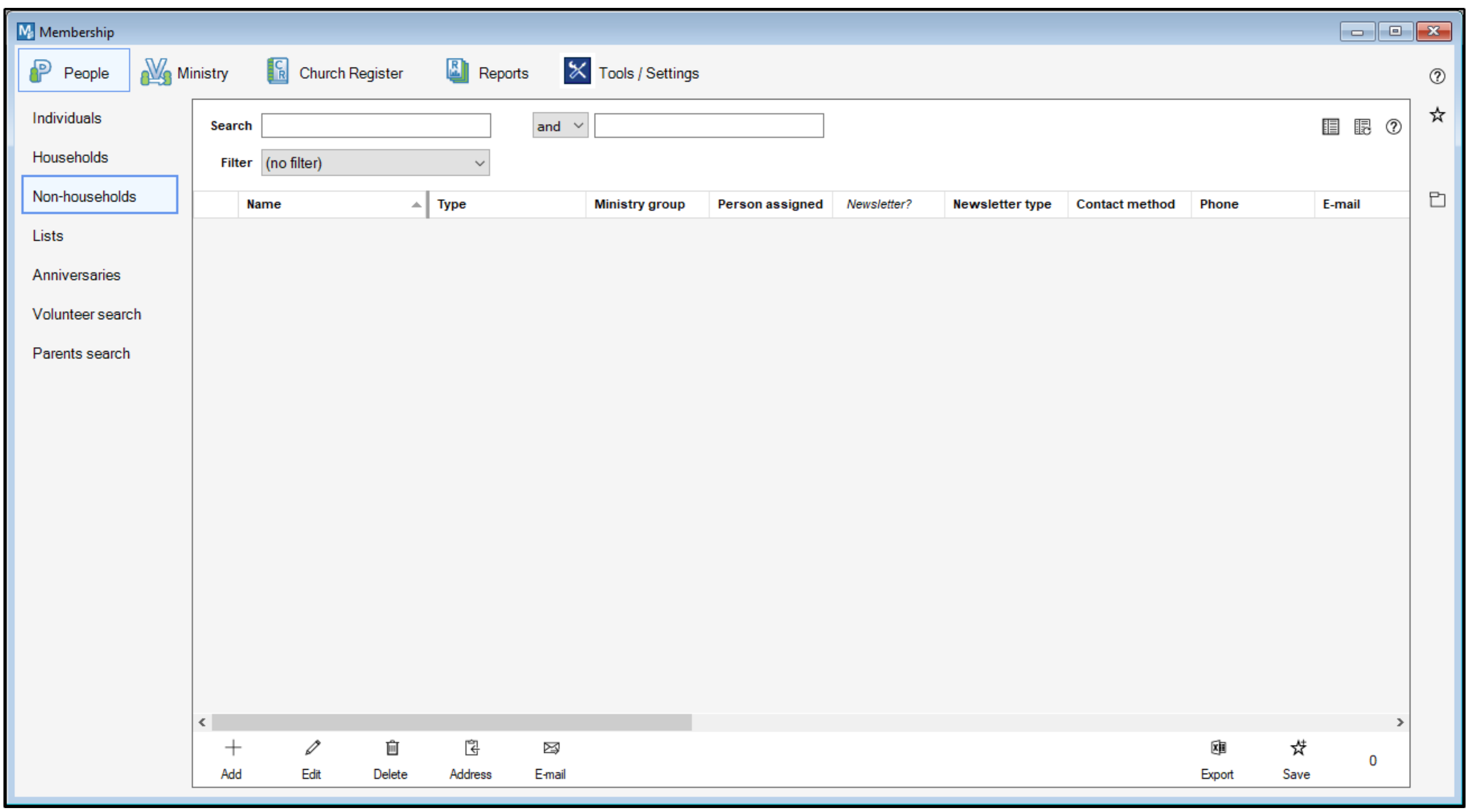


# Non-Households Grid

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

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

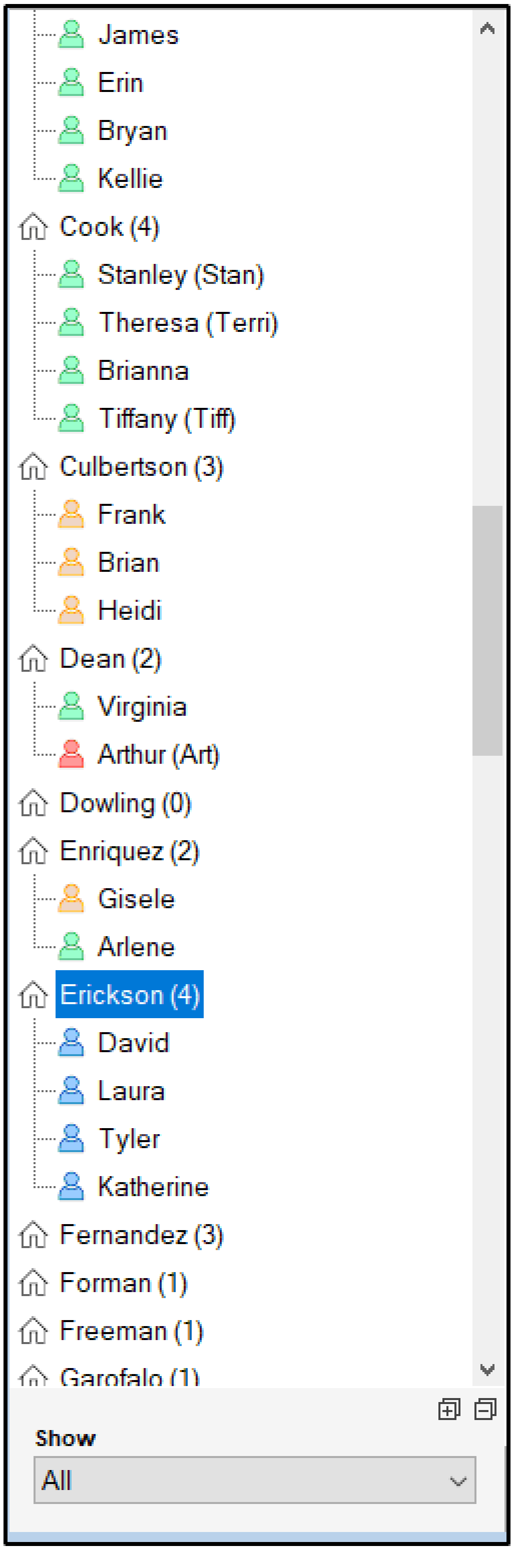
In addition to being able to add, edit and delete non-households, you can also copy the address of a non-household by clicking the "Address" button down at the bottom of the grid. You can also click the "Email" option to bring up the email window to send an email to the selected non-household.



# Household Tree

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

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




Legend for color of symbol above:

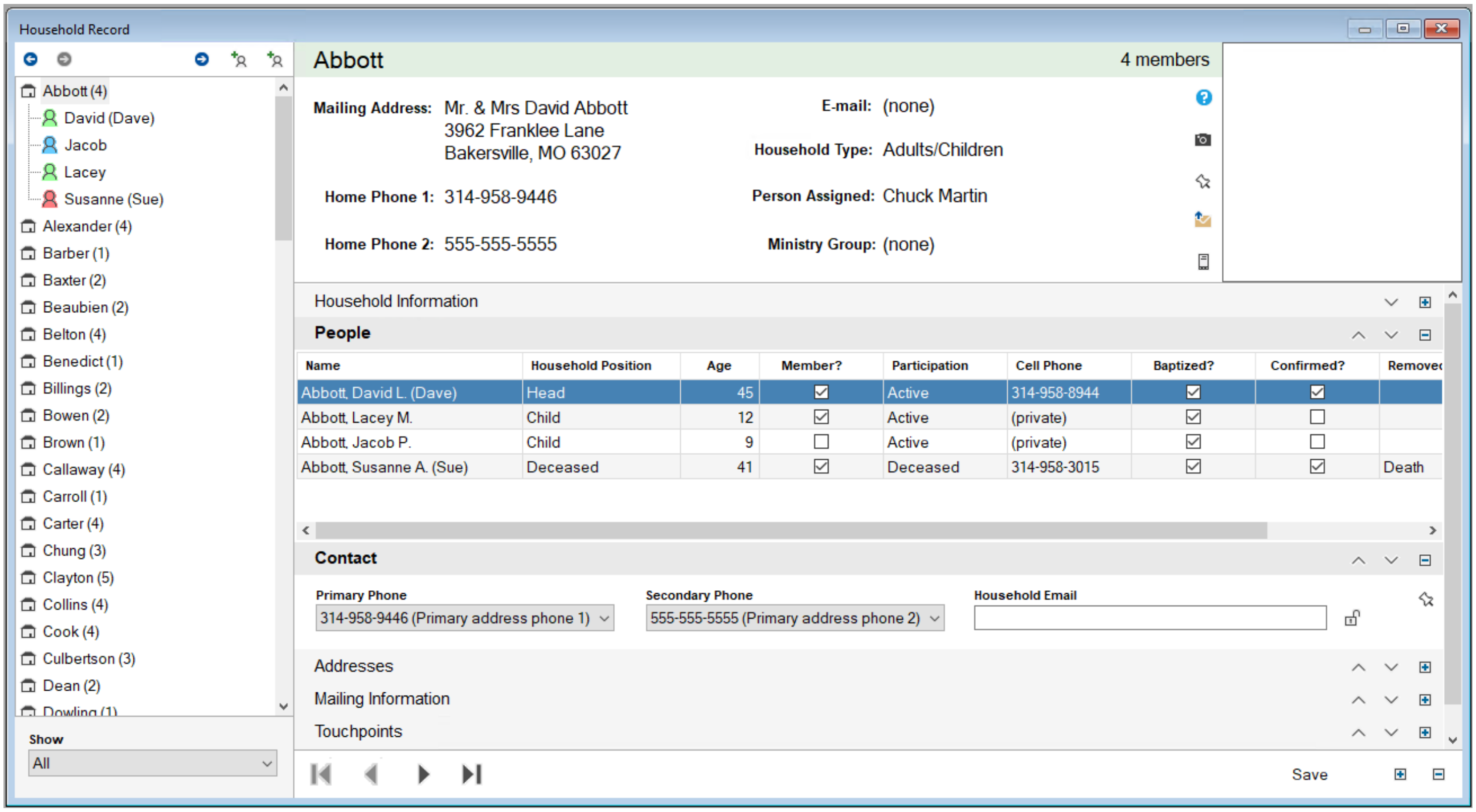
**green** - Member (active)
**yellow** - Member (inactive)
**blue** - Non-member
**red** - Deceased

# Household Records

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

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

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


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

# Add Household

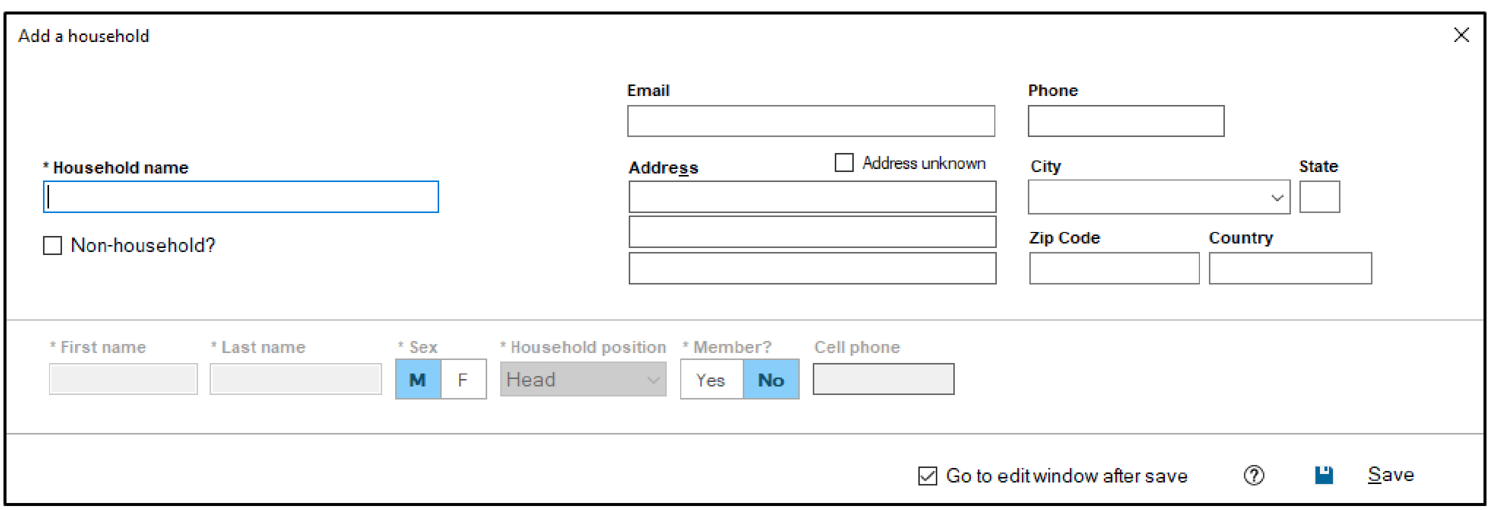
To add a Household in Shepherd's Staff, you need to press the Add button on the household grid. The window that appears next will include fields for all suggested information that should be entered for each household, however, the only field that is required is the Household name. All other fields, while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

1. The first step is to fill in the Household Name field. Traditionally, the last name of the family or group would go into this field. If the household is for something like a business or another church, check the box for "Non-Household?" to indicate that this is not a family you're filling in data for.

2. Fill in as much additional information about the household as you can. If you're unsure of the address for the household, check the "Address unknown" box. This will gray out all relevant address fields.

3. If this is a household for a new family at your church, you can start filling out the members of the household. You will need to fill out the Name, Sex, Household Position and Member status. The Cell phone field is optional, and can be filled out for each person you add. Once you start adding information for one person, another box will appear if you need to add additional people

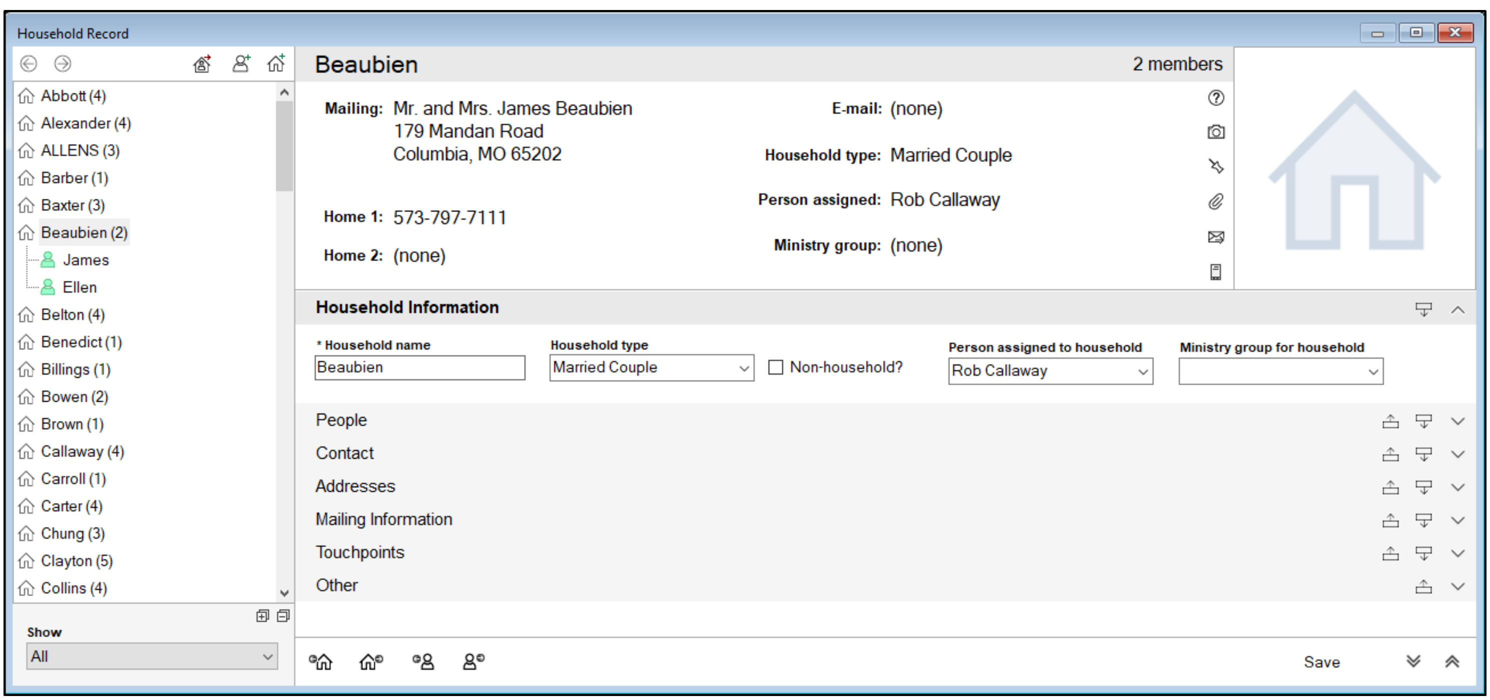
4. If you want to add more information to the household than what appears on this window, before saving the household, make sure the "Go to edit window after save box is checked". Click Save to save the household and the people you have added.



# Household Information Tab

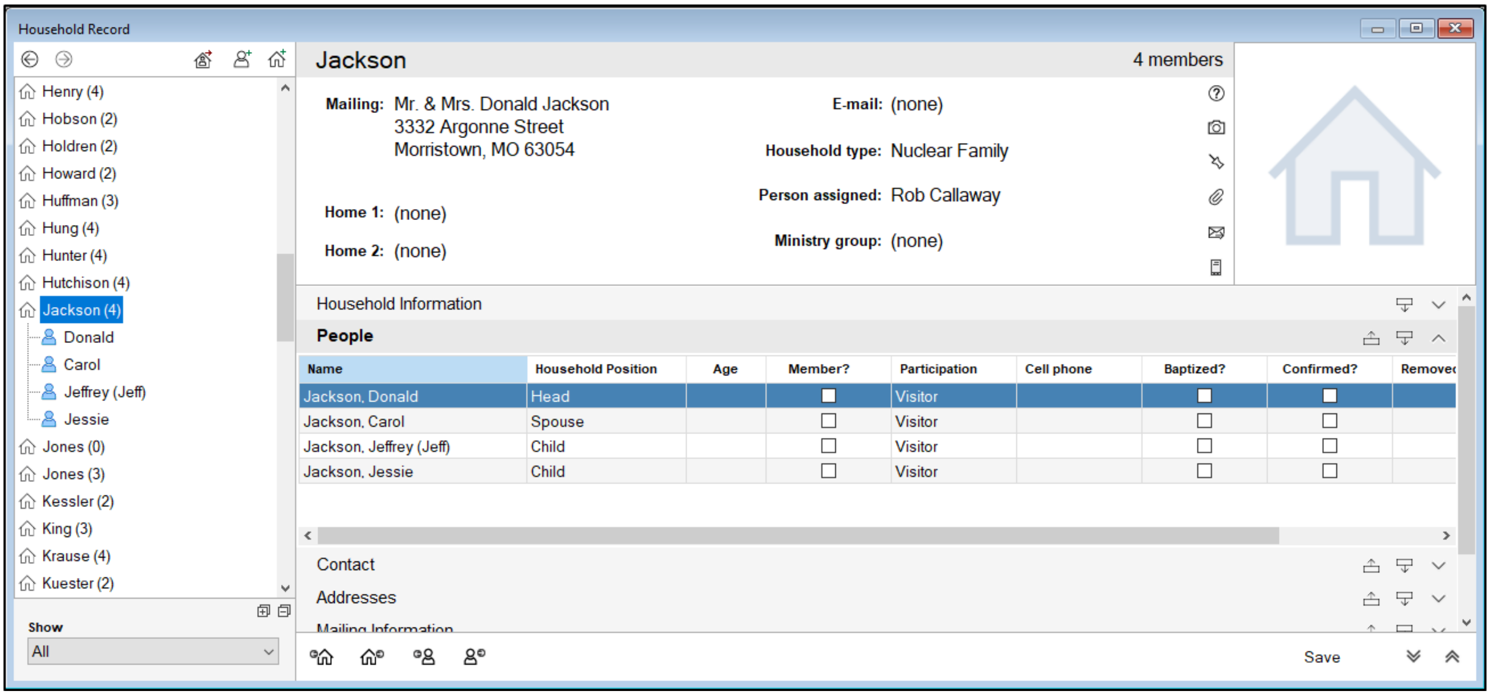
The Household Information Tab of a household record contains fields that Name and describe the household, such as setting the Person Assigned and Ministry Group for that household. You can also designate a household as a "Non-Household" in this tab.

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



# People Tab

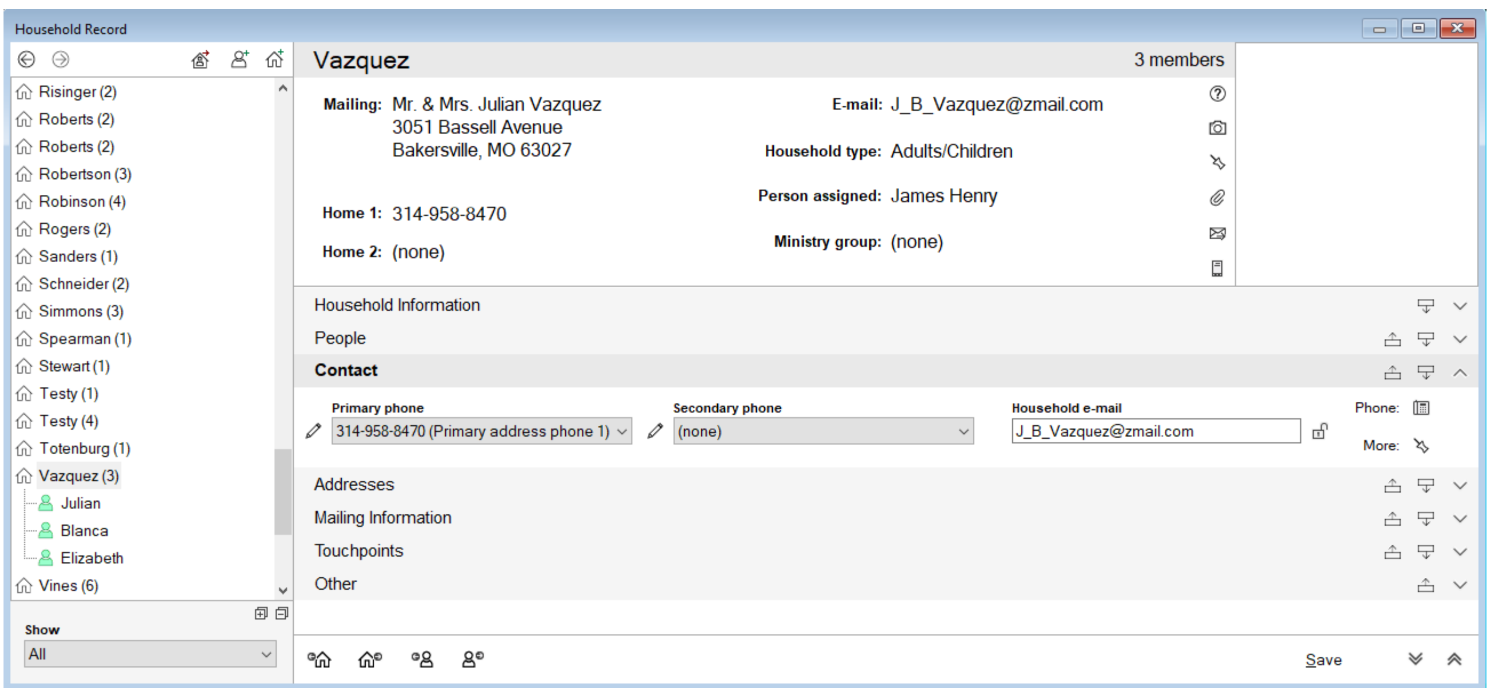
This tab in a household record lists the people who are members of the currently selected household. This tab contains information on each person's household position, as well as membership status and other information on a person's relationship with the church. You can double click on any person on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



# Contact Tab

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

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

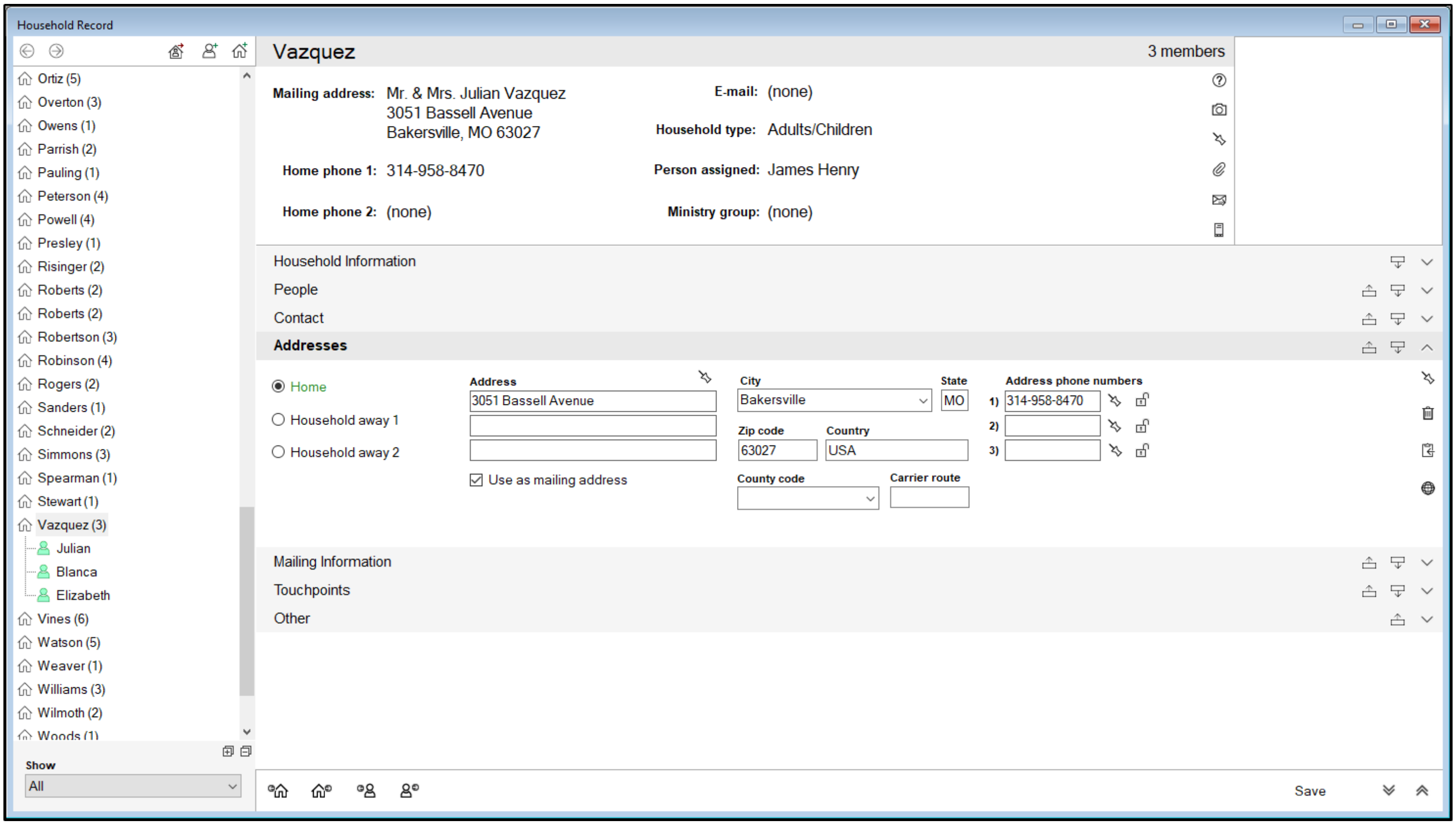


# Household Addresses Tab

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

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

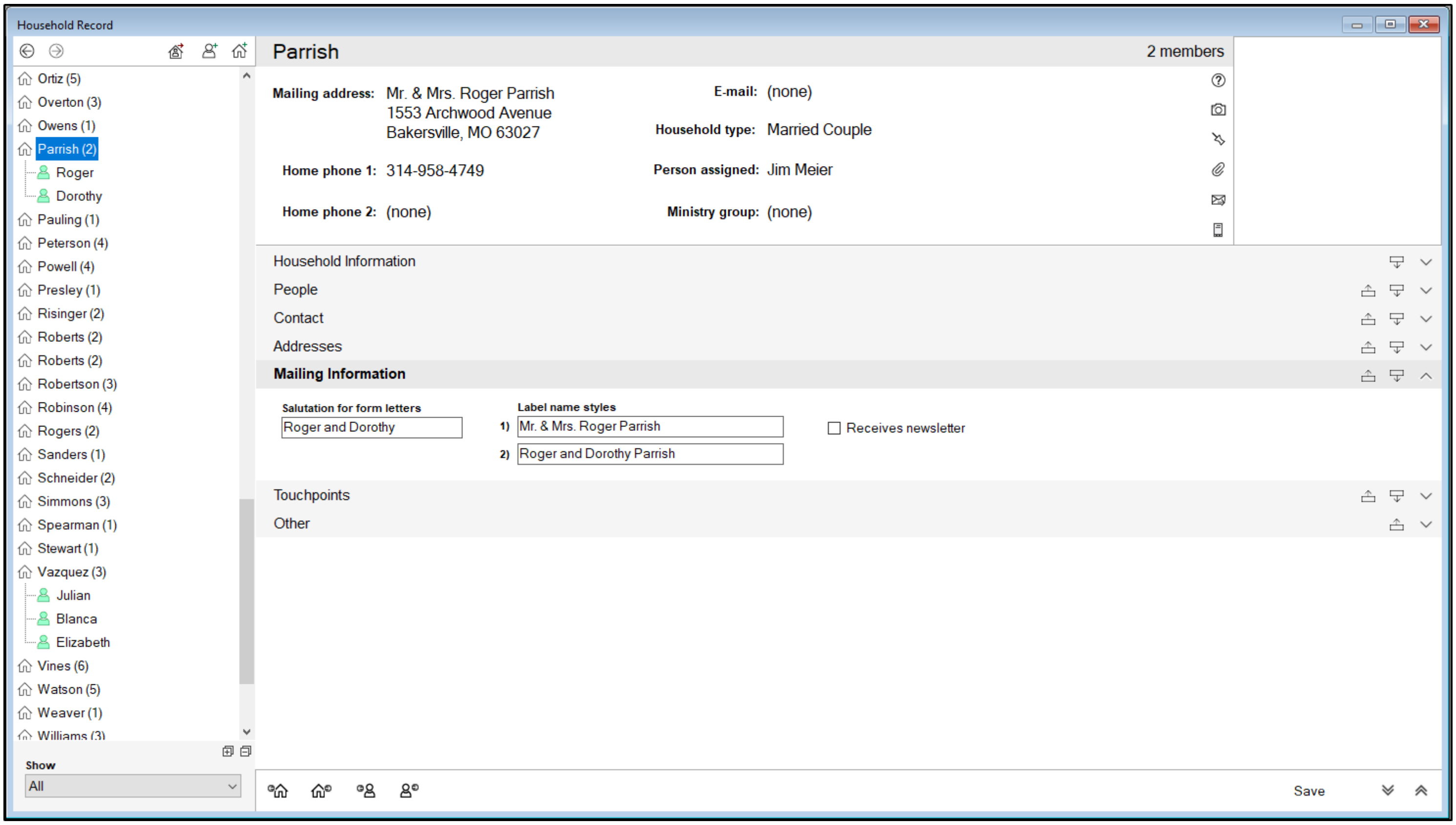
To add notes about the address as a whole, click the notes button (thumbtack) on the far right side of the tab. To delete the address, click the trash can icon. If you want to copy all of the address to your clipboard in windows, click the clipboard icon. Finally, if you want to see the address on Google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


Household Record
Ortiz (5)
Overton (3)
Owens (1)
Parrish (2)
Pauling (1)
Peterson (4)
Powell (4)
Presley (1)
Risinger (2)
Roberts (2)
Roberts (2)
Robertson (3)
Robinson (4)
Rogers (2)
Sanders (1)
Schneider (2)
Simmons (3)
Spearman (1)
Stewart (1)
Vazquez (3)
Julian
Blanca
Elizabeth
Vines (6)
Watson (5)
Weaver (1)
Williams (3)
Wilmoth (2)
Woods (1)
Show
All
Vazquez
3 members
Mailing address: Mr. & Mrs. Julian Vazquez
3051 Bassell Avenue
Bakersville, MO 63027
E-mail: (none)
Household type: Adults/Children
Home phone 1: 314-958-8470
Person assigned: James Henry
Home phone 2: (none)
Ministry group: (none)
Household Information
People
Contact
Addresses
Home
Household away 1
Household away 2
Address
3051 Bassell Avenue
Use as mailing address
City
Bakersville
State
MO
Zip code
63027
Country
USA
County code
Carrier route
Address phone numbers
1) 314-958-8470
2)
3)
Mailing Information
Touchpoints
Other
Save

# Mailing Information Tab

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

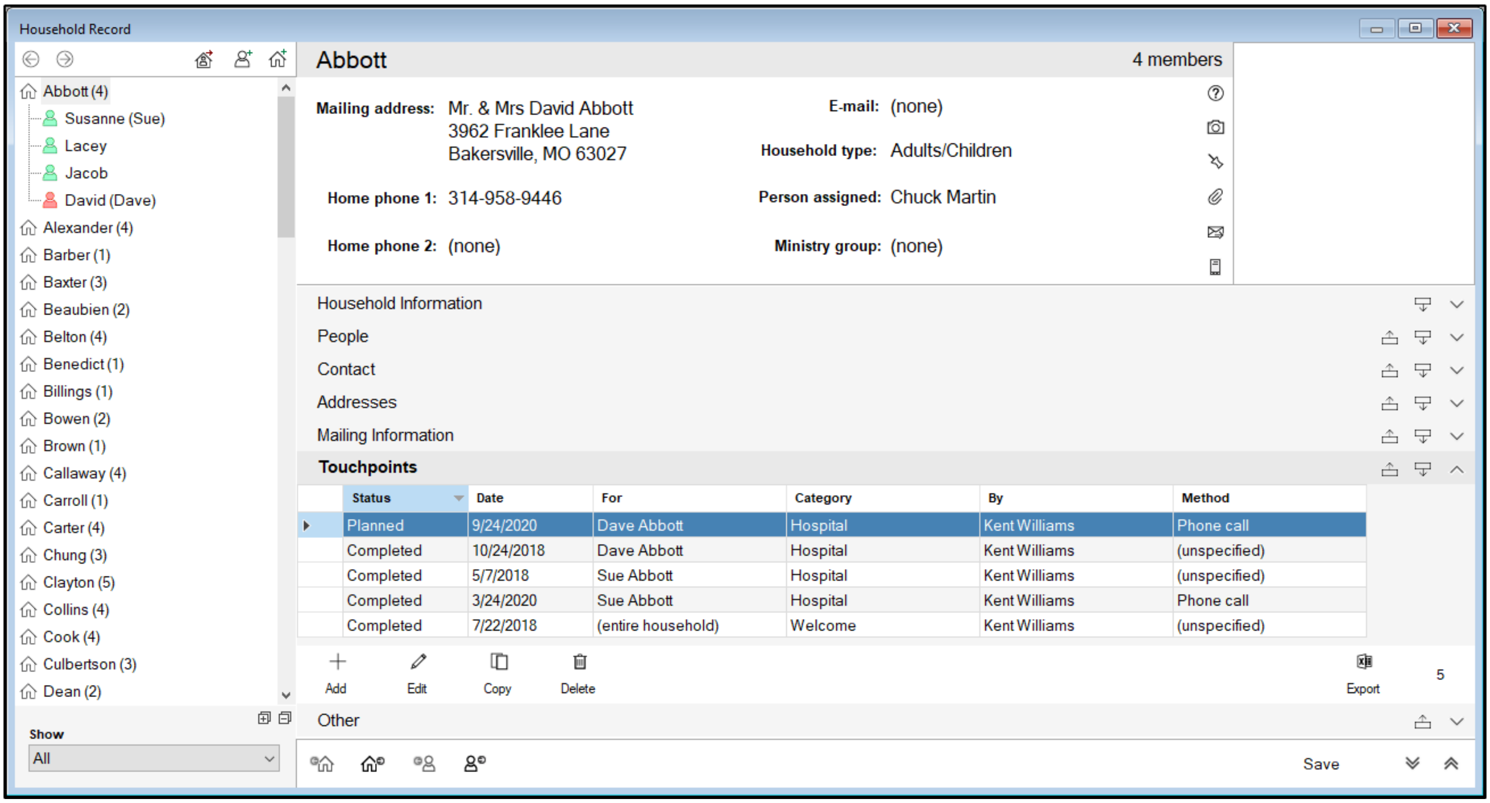
- Salutation for form letters: This is how the household name will appear when you use Mail Merge to create a form letter. When you enter information in this field, try to use the same format for each household, so you have a consistent outcome for your form letters (For example, don't enter Dave and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



Household Record
Ortiz (5)
Overton (3)
Owens (1)
Parrish (2)
Roger
Dorothy
Pauling (1)
Peterson (4)
Powell (4)
Presley (1)
Risinger (2)
Roberts (2)
Roberts (2)
Robertson (3)
Robinson (4)
Rogers (2)
Sanders (1)
Schneider (2)
Simmons (3)
Spearman (1)
Stewart (1)
Vazquez (3)
Julian
Blanca
Elizabeth
Vines (6)
Watson (5)
Weaver (1)
Williams (3)
Show
All
Parrish
2 members
Mailing address: Mr. & Mrs. Roger Parrish
1553 Archwood Avenue
Bakersville, MO 63027
E-mail: (none)
Household type: Married Couple
Home phone 1: 314-958-4749
Person assigned: Jim Meier
Home phone 2: (none)
Ministry group: (none)
Household Information
People
Contact
Addresses
Mailing Information
Salutation for form letters
Roger and Dorothy
Label name styles
1) Mr. & Mrs. Roger Parrish
2) Roger and Dorothy Parrish
Receives newsletter
Touchpoints
Other
Save

# Touchpoints Tab

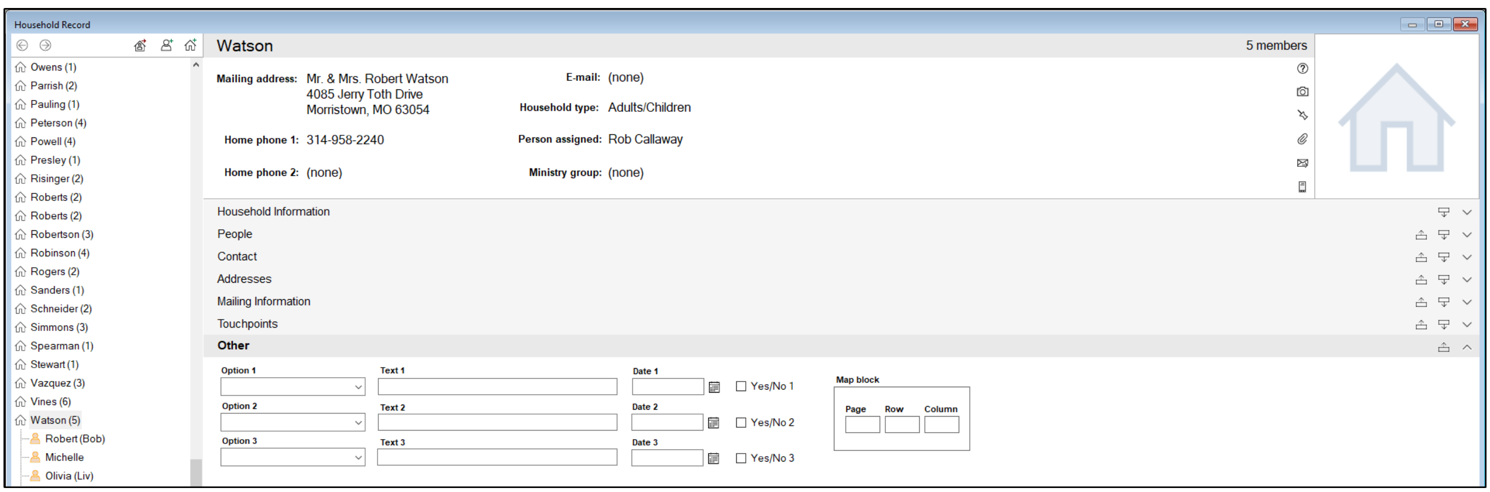
The Touchpoints tab shows all planned and completed touchpoints for the household, and each individual in the household, with some basic details including date, category, who made the touchpoint, and what method it took. You also have the ability to add both planned and completed touchpoints for the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



# Household Other Tab

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

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

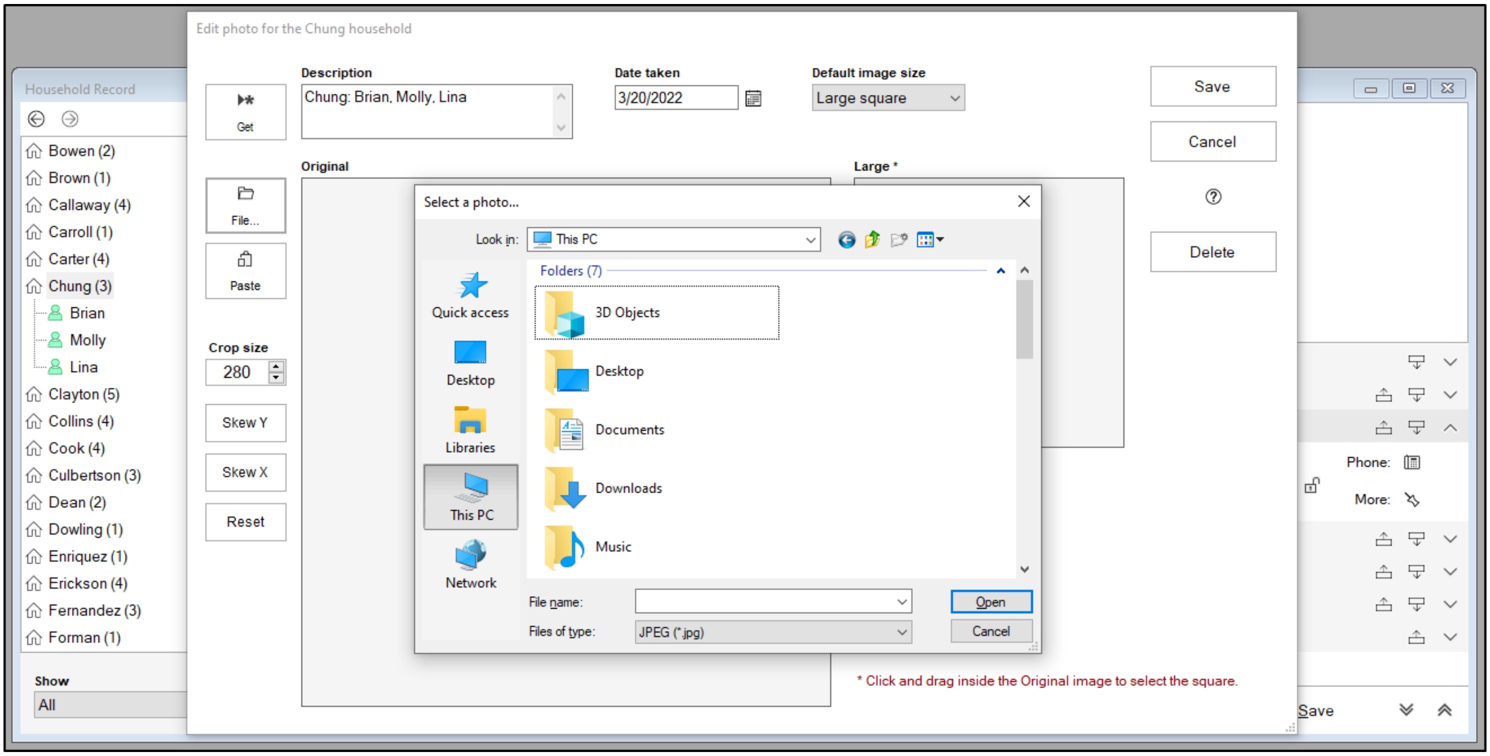


# How to Add a Household Photo in Membership

You can add a photo to an Household record in Membership.  This will allow you to print photo directories, and to have an at-a-glance record to help you tie names and faces together.  It's a great feature for larger congregations, and to get to know new members.

To add a photo to a Household record, in the Membership module, go to the Households grid.

1. Select the Household in question and either double-click, or click the Edit button at the bottom of the grid to open the record for editing.
2. Once in the Household record, you have two choices to get to the Photo Manager in the top section with the overview of the Household's details.
    1. You can either click the camera icon in the list of icons toward the right side of the record.
    2. Or you can click in the big box to the right of that icon, which is where the image will display once you've added it.
3. Either of those options will bring up the "Edit Photo" box.
4. The "Get" button will pull a description from the record you were in when you clicked to open the box. This will likely already be filled in by default.
5. The "File" button is where you will click to browse to the location of the image file you want to add, or if you have copied it, you can use the paste button.
6. Once the image is there you can click and drag in the box marked "Original" and/or crop it using the options on the left until it is centered and looks right in the "Large" and "Small" boxes.
7. Click Cancel if you change your mind or Save to save your changes.
8. The Delete button is available to remove an image as needed.



Edit photo for the Chung household
Household Record
Bowen (2)
Brown (1)
Callaway (4)
Carroll (1)
Carter (4)
Chung (3)
Brian
Molly
Lina
Clayton (5)
Collins (4)
Cook (4)
Culbertson (3)
Dean (2)
Dowling (1)
Enriquez (1)
Erickson (4)
Fernandez (3)
Forman (1)
Show
All
Get
File...
Paste
Crop size
280
Skew Y
Skew X
Reset
Description
Chung: Brian, Molly, Lina
Date taken
3/20/2022
Default image size
Large square
Save
Cancel
Delete
Original
Large *
Select a photo...
Look in: This PC
Quick access
Desktop
Libraries
This PC
Network
Folders (7)
3D Objects
Desktop
Documents
Downloads
Music
File name:
Files of type: JPEG (*.jpg)
Open
Cancel
* Click and drag inside the Original image to select the square.
Phone:
More:
Save

# Delete Household

A Household represents a person, group or family's home or location. It contains information that is shared by everyone in it, and every Person record belongs to a Household. So in order to delete a Household it can no longer contain any people.

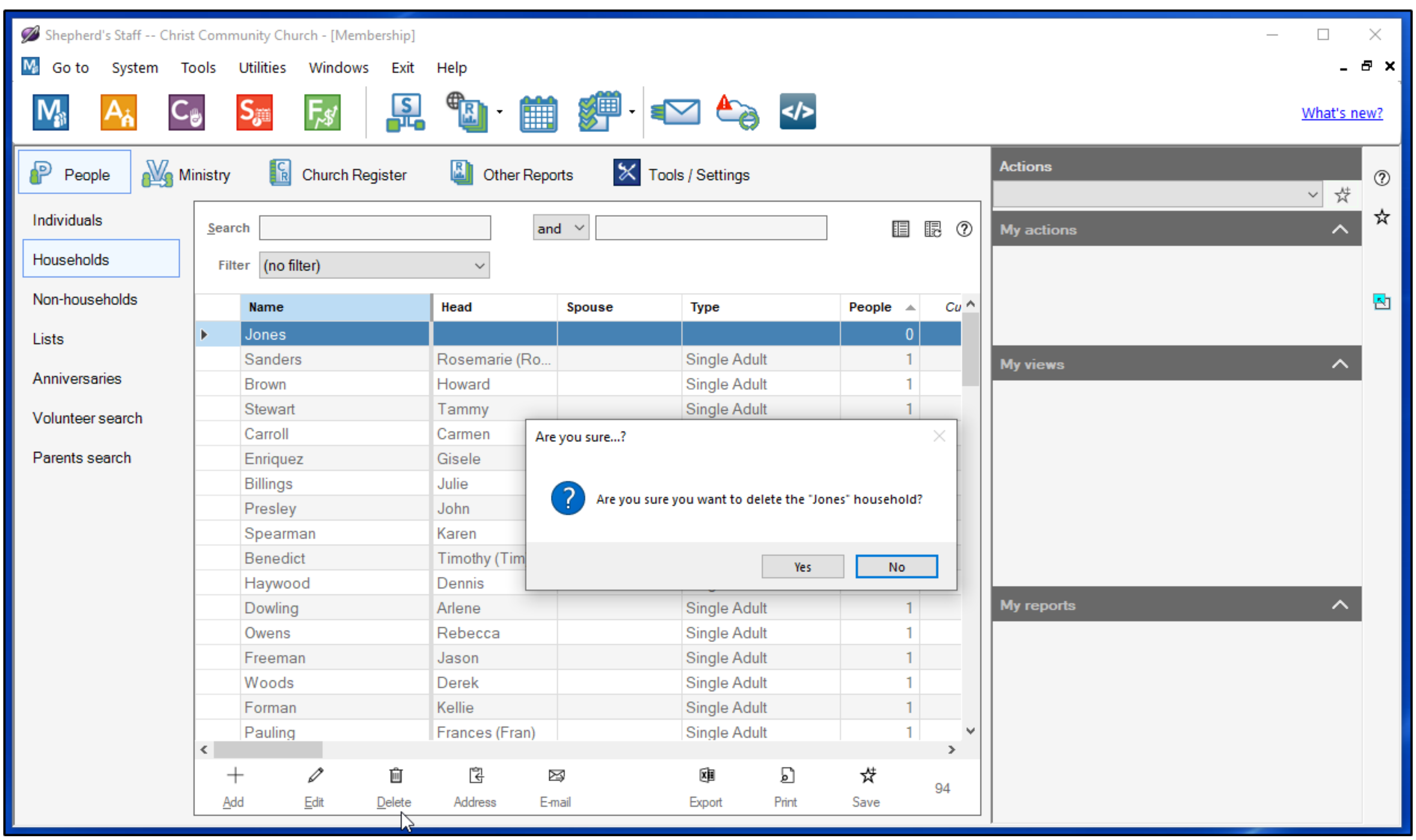
The first steps for deleting a Household then, will be to clear it of people by deleting them, moving them to other Households or, if a person was accidentally created twice perhaps, by combining the duplicate information under a record in another household. See articles for each of these tasks below:

Deleting-a-person

Move-a-Person-to-a-Different-Household

Combine-Duplicate-Person-Information

Deleting the people does not automatically delete the Household, but once a Household no longer contains any people, it is very easy to delete. Just go to the Households grid, highlight the Household in question and click Delete at the bottom of the grid.

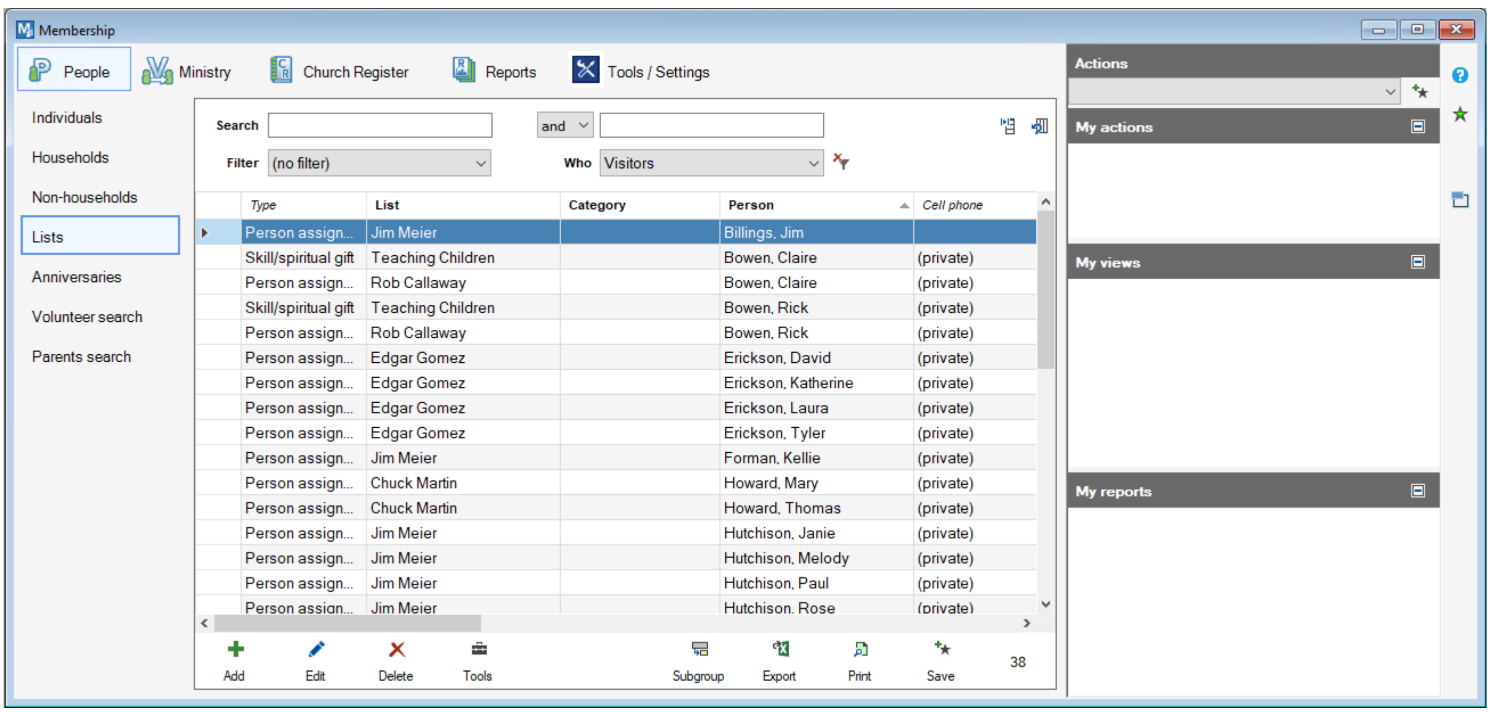


# The Lists Grid

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

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

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

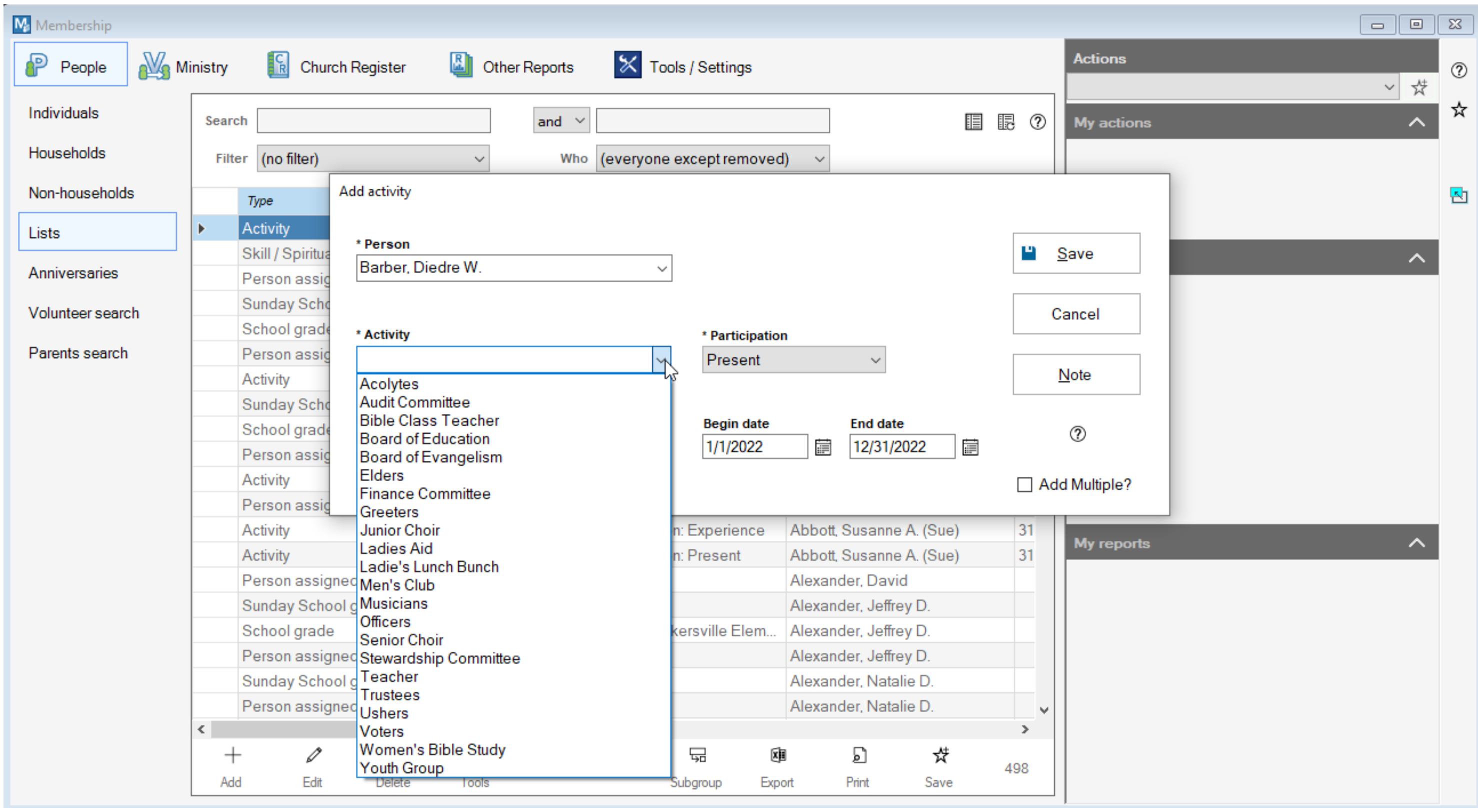


# Add Activity

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

## Adding An Activity Record to An Individual Person

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



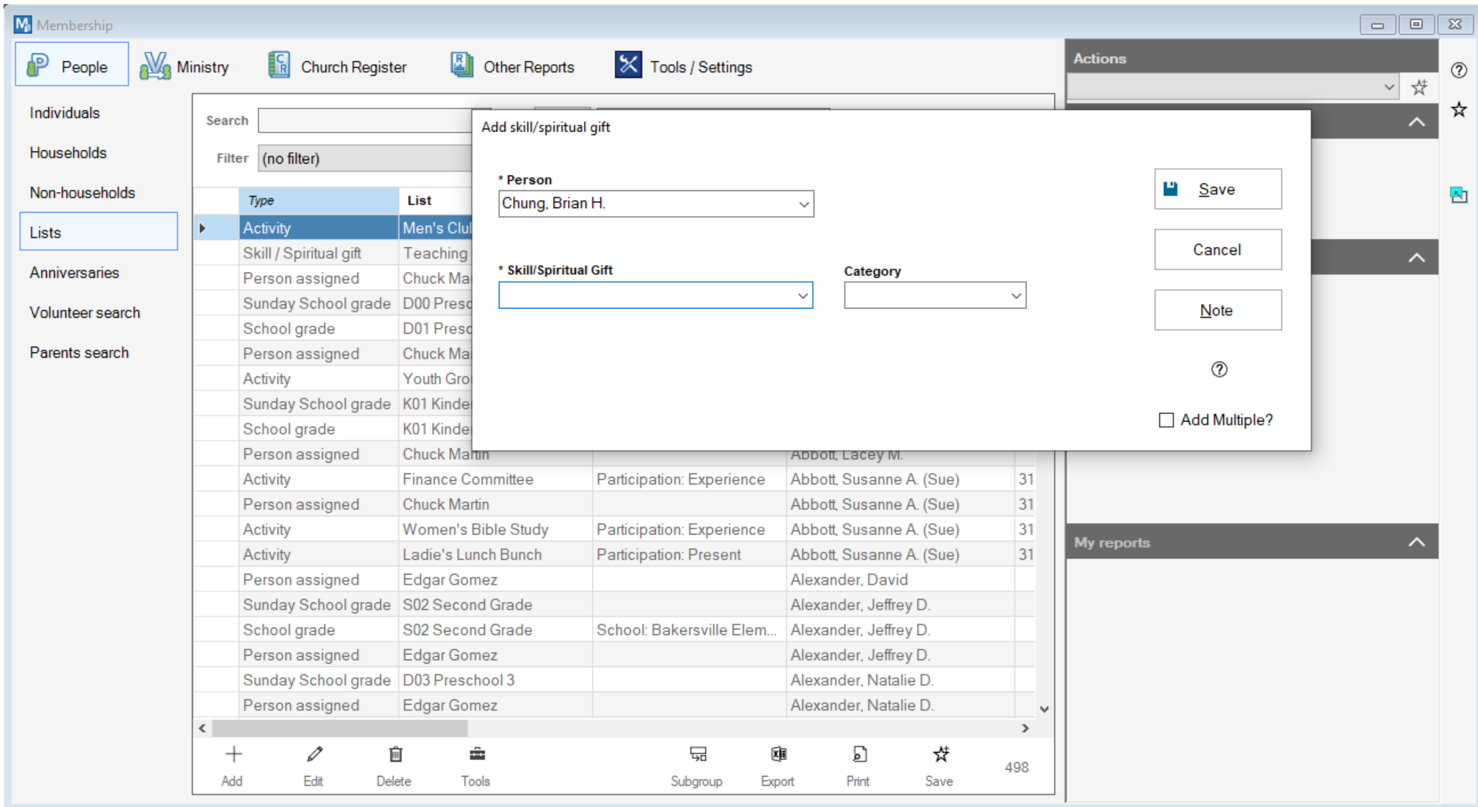
Membership
People
Ministry
Church Register
Other Reports
Tools / Settings
Actions
My actions
My reports
Individuals
Households
Non-households
Lists
Anniversaries
Volunteer search
Parents search
Search
and
Filter
(no filter)
Who
(everyone except removed)
Type
Add activity
* Person
Barber, Diedre W.
* Activity
* Participation
Present
Begin date
1/1/2022
End date
12/31/2022
Save
Cancel
Note
Add Multiple?
Acolytes
Audit Committee
Bible Class Teacher
Board of Education
Board of Evangelism
Elders
Finance Committee
Greeters
Junior Choir
Ladies Aid
Ladie's Lunch Bunch
Men's Club
Musicians
Officers
Senior Choir
Stewardship Committee
Teacher
Trustees
Ushers
Voters
Women's Bible Study
Youth Group
Abbott, Susanne A. (Sue)
Alexander, David
Alexander, Jeffrey D.
Alexander, Natalie D.
Add
Edit
Subgroup
Export
Print
Save
498

# Add Skill/Spiritual Gift

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

## Adding A Skill/Spiritual Gift Record to An Individual Person

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

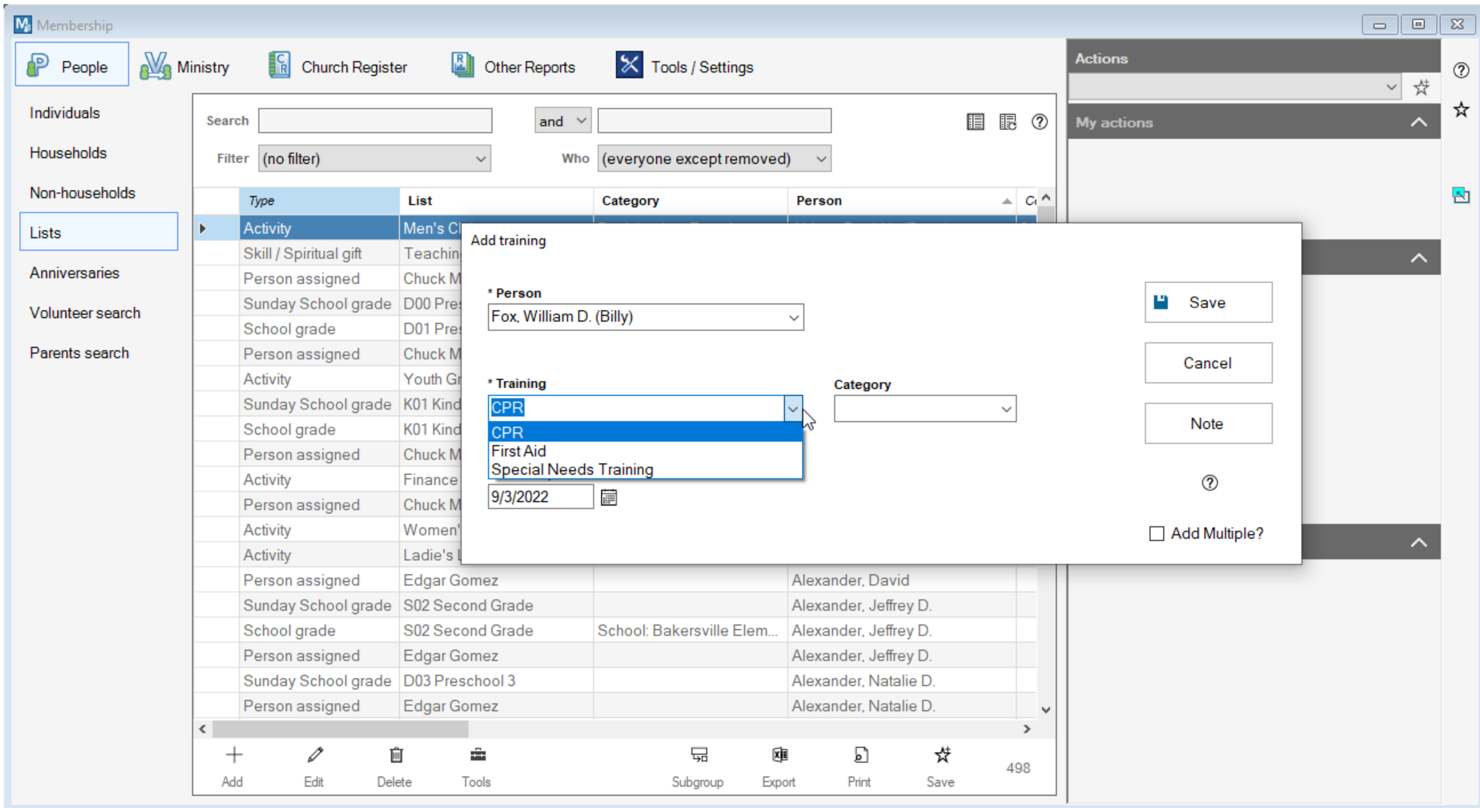

Membership
People
Ministry
Church Register
Other Reports
Tools / Settings
Actions
Individuals
Households
Non-households
Lists
Anniversaries
Volunteer search
Parents search
Search
Filter
(no filter)
Type
List
Add skill/spiritual gift
* Person
Chung, Brian H.
* Skill/Spiritual Gift
Category
Save
Cancel
Note
Add Multiple?
Activity | Men's Clu
Skill / Spiritual gift | Teaching
Person assigned | Chuck Ma
Sunday School grade | D00 Presc
School grade | D01 Presc
Person assigned | Chuck Ma
Activity | Youth Gro
Sunday School grade | K01 Kinde
School grade | K01 Kinde
Person assigned | Chuck Martin | | Abbott, Lacey M.
Activity | Finance Committee | Participation: Experience | Abbott, Susanne A. (Sue) | 31
Person assigned | Chuck Martin | | Abbott, Susanne A. (Sue) | 31
Activity | Women's Bible Study | Participation: Experience | Abbott, Susanne A. (Sue) | 31
Activity | Ladie's Lunch Bunch | Participation: Present | Abbott, Susanne A. (Sue) | 31
Person assigned | Edgar Gomez | | Alexander, David
Sunday School grade | S02 Second Grade | | Alexander, Jeffrey D.
School grade | S02 Second Grade | School: Bakersville Elem... | Alexander, Jeffrey D.
Person assigned | Edgar Gomez | | Alexander, Jeffrey D.
Sunday School grade | D03 Preschool 3 | | Alexander, Natalie D.
Person assigned | Edgar Gomez | | Alexander, Natalie D.
Add
Edit
Delete
Tools
Subgroup
Export
Print
Save
498
My reports

# Add Training

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

## Adding A Training Record to an Individual Person

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



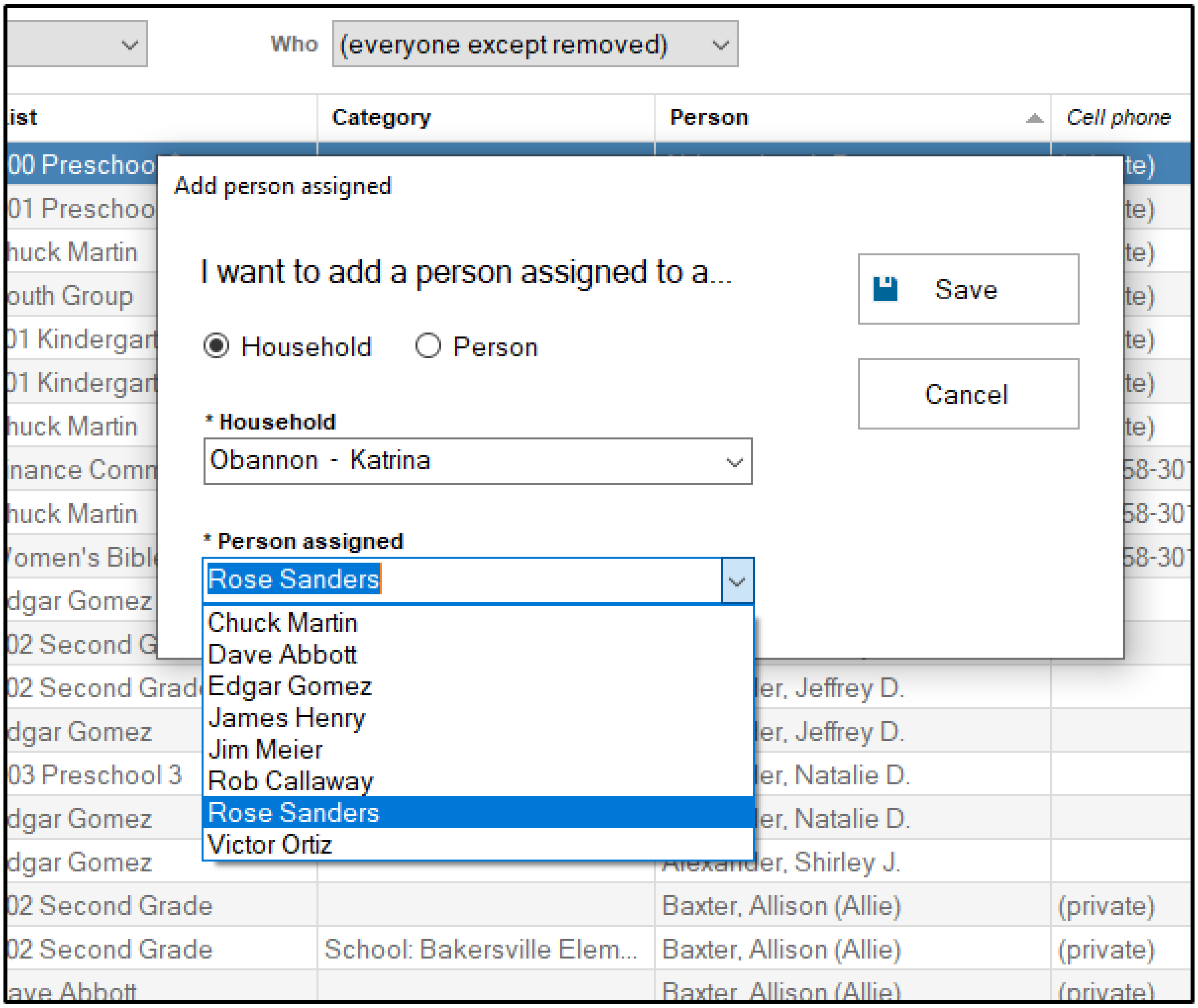
Membership
People
Ministry
Church Register
Other Reports
Tools / Settings
Actions
My actions
Individuals
Households
Non-households
Lists
Anniversaries
Volunteer search
Parents search
Search
and
Filter
(no filter)
Who
(everyone except removed)
Type
List
Category
Person
Activity
Skill / Spiritual gift
Person assigned
Sunday School grade
School grade
Person assigned
Activity
Sunday School grade
School grade
Person assigned
Activity
Person assigned
Activity
Activity
Person assigned
Edgar Gomez
Alexander, David
Sunday School grade
S02 Second Grade
Alexander, Jeffrey D.
School grade
S02 Second Grade
School: Bakersville Elem...
Alexander, Jeffrey D.
Person assigned
Edgar Gomez
Alexander, Jeffrey D.
Sunday School grade
D03 Preschool 3
Alexander, Natalie D.
Person assigned
Edgar Gomez
Alexander, Natalie D.
Add
Edit
Delete
Tools
Subgroup
Export
Print
Save
498
Add training
* Person
Fox, William D. (Billy)
* Training
CPR
CPR
First Aid
Special Needs Training
Category
9/3/2022
Save
Cancel
Note
Add Multiple?

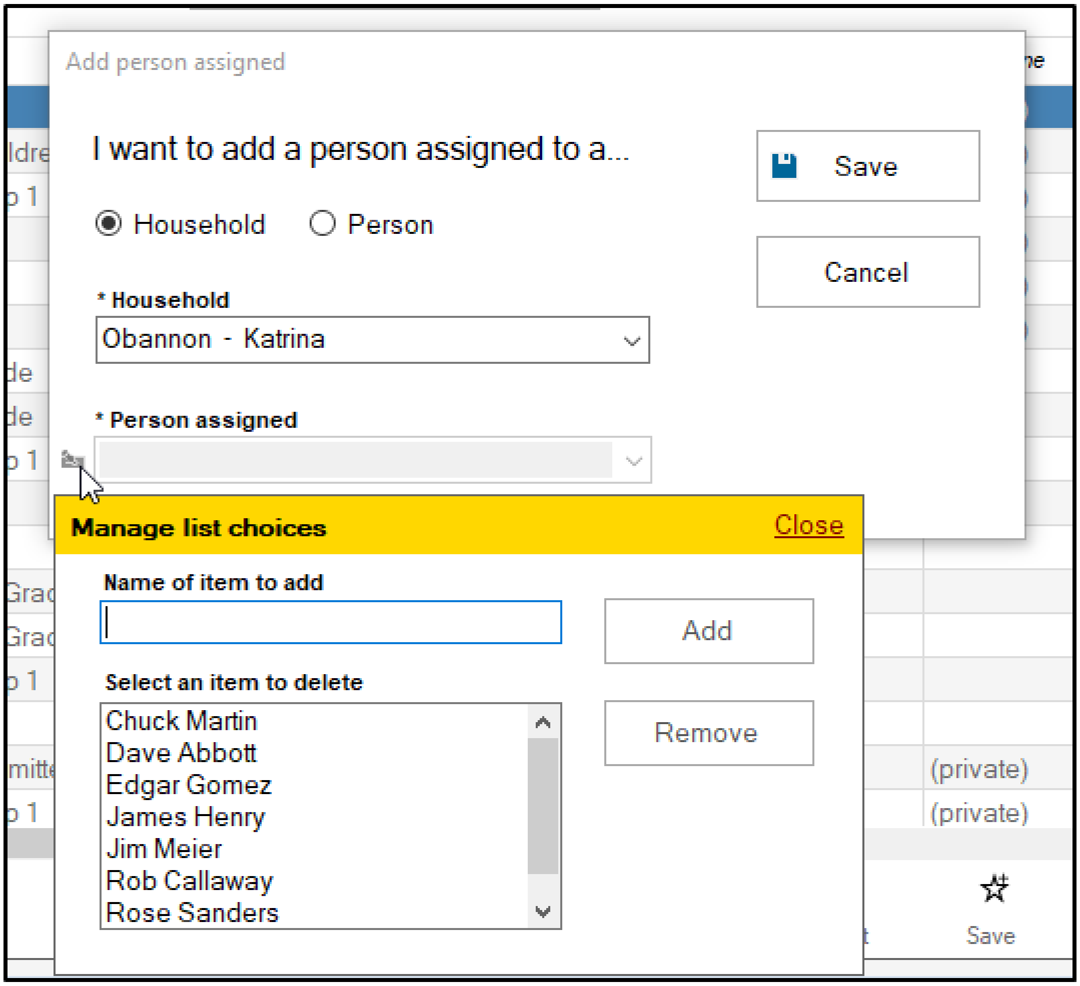
# Add Person Assigned

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

## Adding One Person Assigned Record to One Household or Individual

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


Who
(everyone except removed)
List
Category
Person
Cell phone
Add person assigned
I want to add a person assigned to a...
Household
Person
Save
Cancel
* Household
Obannon - Katrina
* Person assigned
Rose Sanders
Chuck Martin
Dave Abbott
Edgar Gomez
James Henry
Jim Meier
Rob Callaway
Rose Sanders
Victor Ortiz
02 Second Grade
School: Bakersville Elem...
Baxter, Allison (Allie)
(private)


Add person assigned
I want to add a person assigned to a...
Household
Person
Save
Cancel
* Household
Obannon - Katrina
* Person assigned
Manage list choices
Close
Name of item to add
Add
Select an item to delete
Chuck Martin
Dave Abbott
Edgar Gomez
James Henry
Jim Meier
Rob Callaway
Rose Sanders
Remove
(private)
(private)
Save

# Add Ministry Group

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

## Adding a Ministry Group Record to a Household or Individual

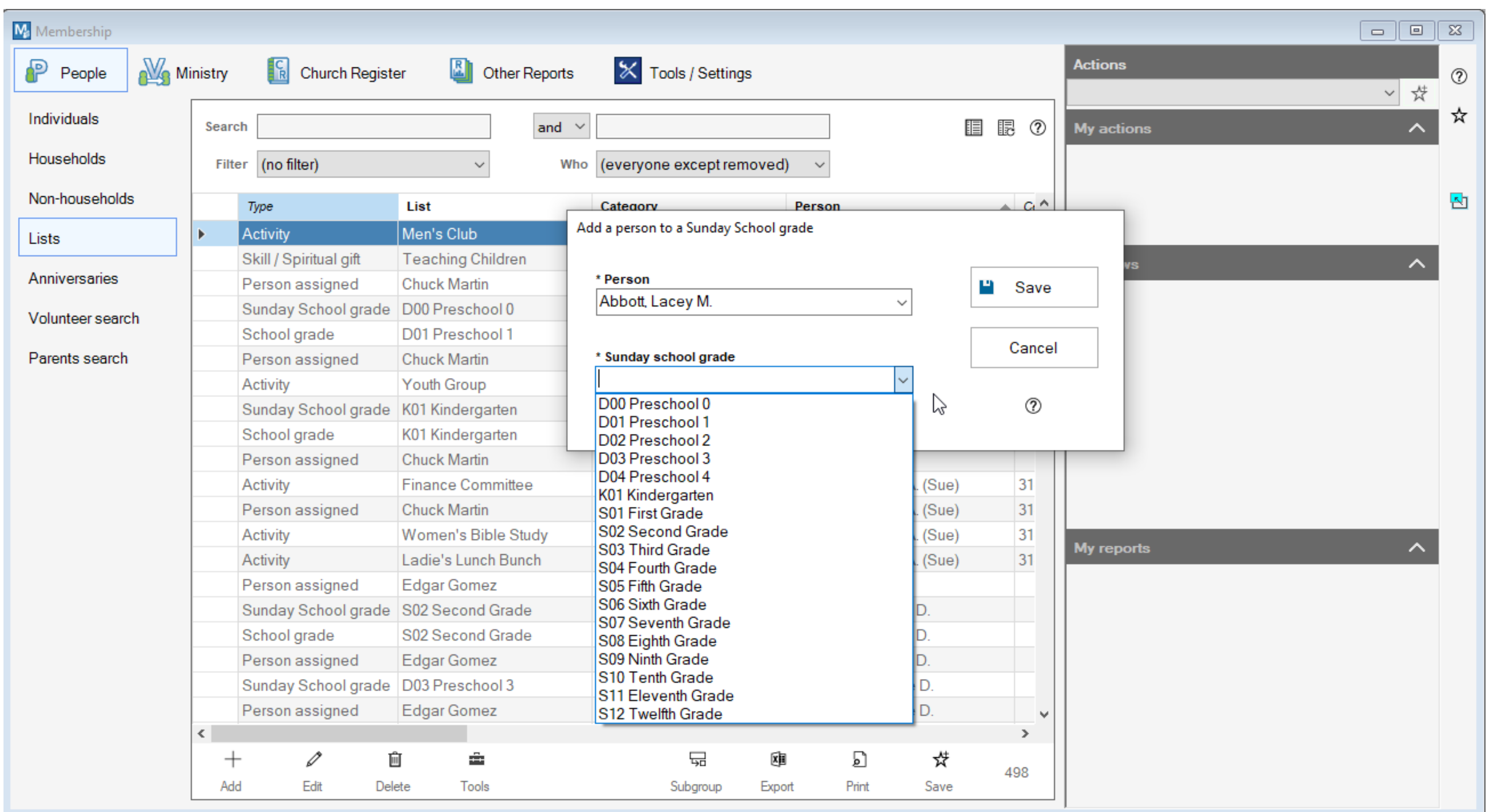
1. In the People Tab, click on Lists
2. Click the Add button at the bottom of the grid and select "Ministry Group" in the window that appears.
3. In the next window, choose if you're adding the group to an Individual or a Household
4. In the Household or Person field, select the Household or Person you're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

# Add Sunday School/School Grade

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

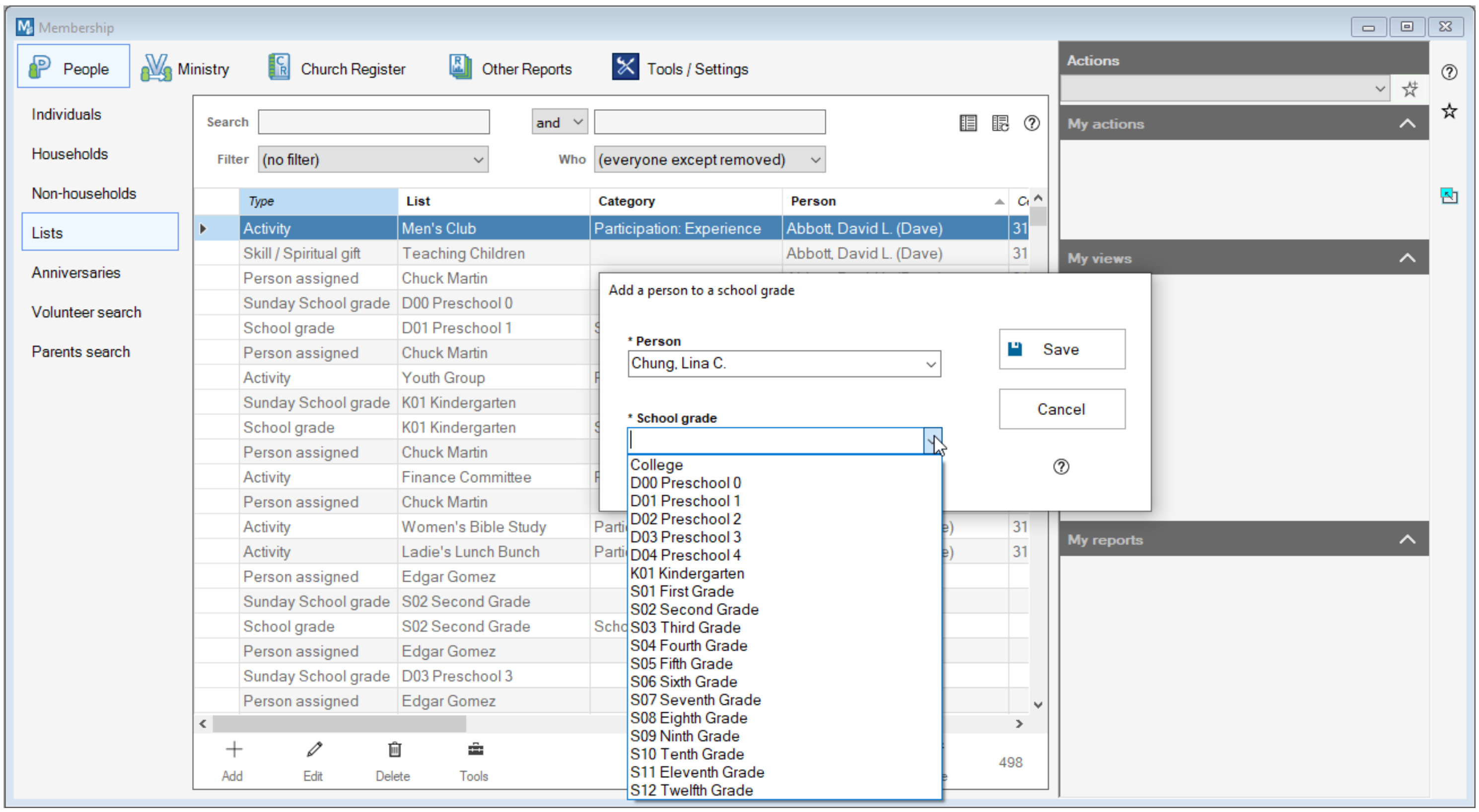
» Add a Sunday School grade to a person:

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



» Add a School grade to a person:

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



# List Mass Updates

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

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

**Add Names to a List**

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

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

**Erase and Replace a List**

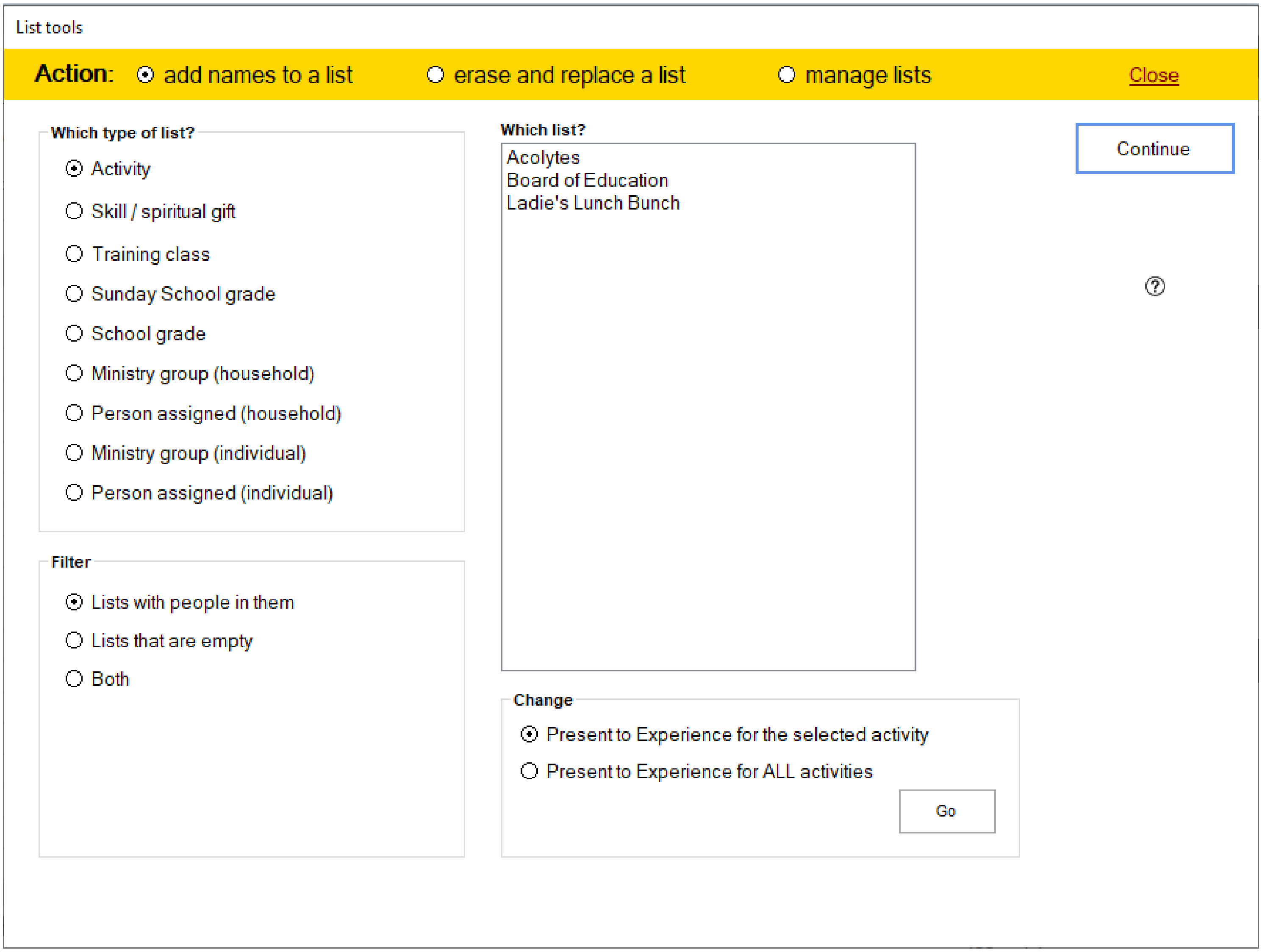
This utility will allow you to remove multiple people from a list and add new people to it at the same time.

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

**Manage Lists**

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

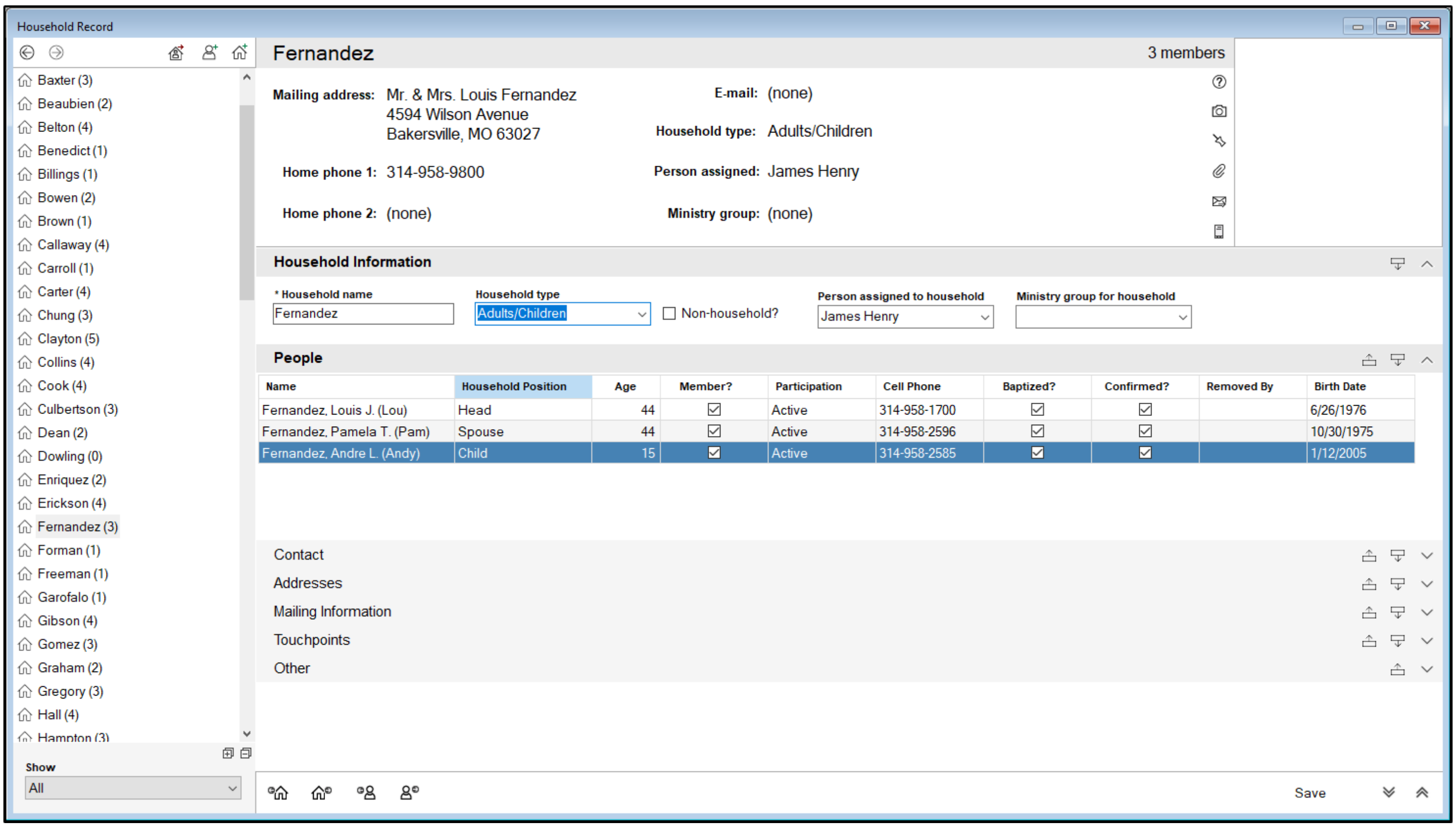
1. Select "manage lists" in the Action section of the Mass Update Window.
2. To add a brand new List, press the "Add" button, type in the name of the new list and press the save icon.
3. If you want to rename, or change the participation on a list, select which type of list you're working with in the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


List tools
Action: add names to a list
erase and replace a list
manage lists
Close
Which type of list?
Activity
Skill / spiritual gift
Training class
Sunday School grade
School grade
Ministry group (household)
Person assigned (household)
Ministry group (individual)
Person assigned (individual)
Filter
Lists with people in them
Lists that are empty
Both
Which list?
Acolytes
Board of Education
Ladie's Lunch Bunch
Continue
Change
Present to Experience for the selected activity
Present to Experience for ALL activities
Go

# Adding to a Family

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

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



# Handling Marriages

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

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

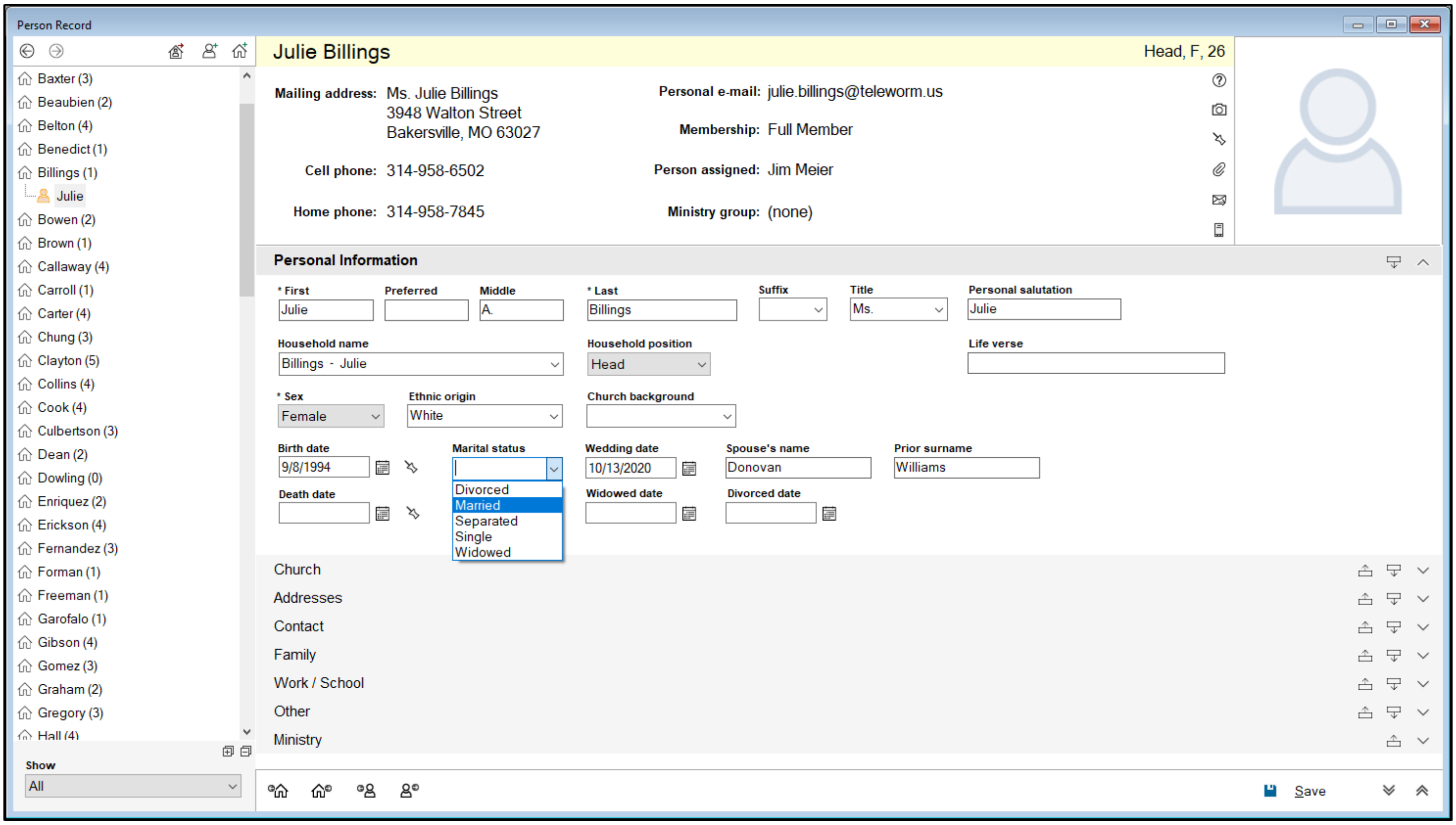
If the Person records already exist, do not create new ones. This will only duplicate the records and add confusion to the process. Instead, move them into a Household record together.

» Does either party already have a Household by themselves?

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

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

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


Person Record
Julie Billings
Head, F, 26
Baxter (3)
Beaubien (2)
Belton (4)
Benedict (1)
Billings (1)
Julie
Bowen (2)
Brown (1)
Callaway (4)
Carroll (1)
Carter (4)
Chung (3)
Clayton (5)
Collins (4)
Cook (4)
Culbertson (3)
Dean (2)
Dowling (0)
Enriquez (2)
Erickson (4)
Fernandez (3)
Forman (1)
Freeman (1)
Garofalo (1)
Gibson (4)
Gomez (3)
Graham (2)
Gregory (3)
Hall (4)
Show
All
Mailing address: Ms. Julie Billings
3948 Walton Street
Bakersville, MO 63027
Cell phone: 314-958-6502
Home phone: 314-958-7845
Personal e-mail: julie.billings@teleworm.us
Membership: Full Member
Person assigned: Jim Meier
Ministry group: (none)
Personal Information
* First
Julie
Preferred
Middle
A.
* Last
Billings
Suffix
Title
Ms.
Personal salutation
Julie
Household name
Billings - Julie
Household position
Head
Life verse
* Sex
Female
Ethnic origin
White
Church background
Birth date
9/8/1994
Marital status
Divorced
Married
Separated
Single
Widowed
Wedding date
10/13/2020
Spouse's name
Donovan
Prior surname
Williams
Death date
Widowed date
Divorced date
Church
Addresses
Contact
Family
Work / School
Other
Ministry
Save

# Managing a Divorce

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

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

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

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

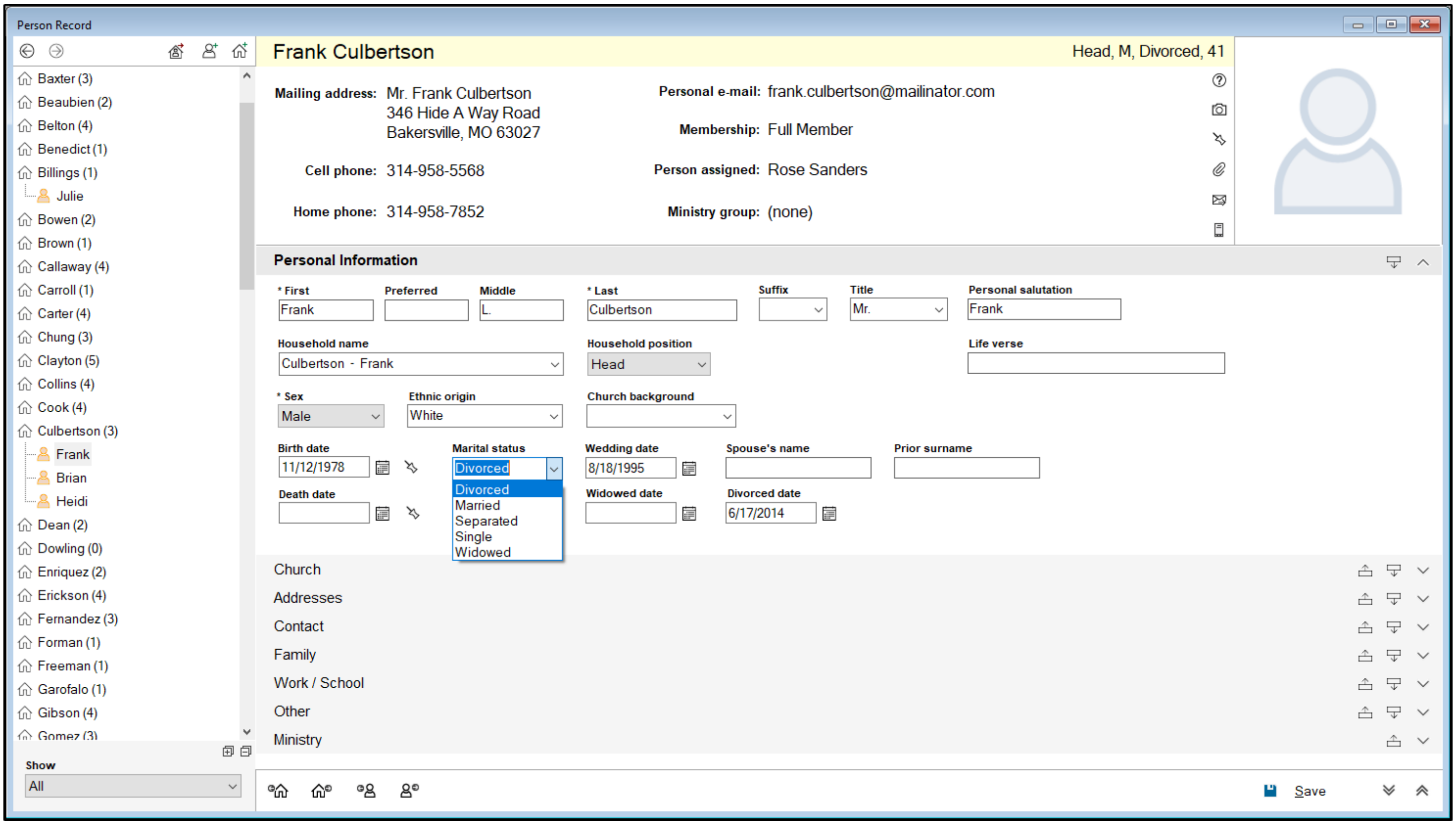
The person who is moving out, and any children that might be moving with them will need to be moved to the new household using the move a person to a different household utility.

» Will any names be changing in the process?

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

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

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



# Remove a Person from Membership

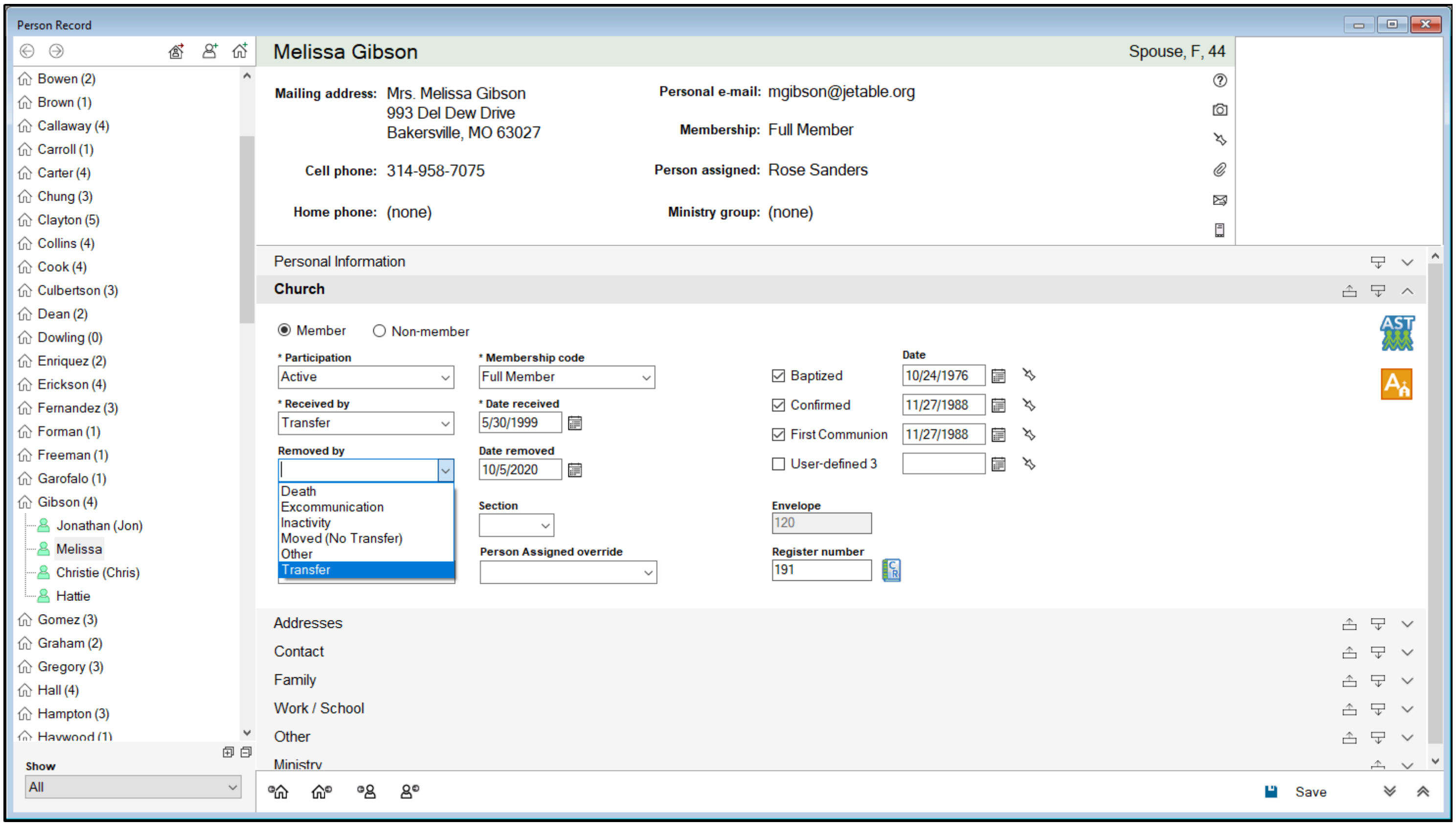
Whenever a person moves or passes away, we want to make sure their record is handled properly, so that their data and your reporting stay accurate.

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

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

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

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




As of version 9.1, there have been some automations put in place to help handle adjustments that should be made to a person's records when that person is marked as being removed from membership. Here's a list of things that happen automatically when this occurs:

1. If a person is marked as being removed by Death, the date removed will now be automatically entered in the "Death Date" field
2. When marked as being removed for any reason, the "Show in Church360 Unite" box is unchecked automatically, which will prevent this person's information from being further updated in Church360 Unite.
3. When being marked as removed for for any reason, when you save your changes, you will be prompted asking if you want to remove that person from any static subgroups they are a part of. If you choose "Yes", it deletes that person from all static subgroups.
4. If a person is marked as being removed by death, they are removed from being enrolled in any attendance event (This does not delete any attendance for past events).
5. If a person is marked as removed by death, and they are marked as "Married" or "Separated" and that person is marked as the "Head of Household" in their household position field, and if there is a "Spouse" in the same household who is also marked as "Married" or "Separated", the following occurs:
    1. The surviving spouse is marked as "Widowed".
    2. The surviving spouse's date widowed is automatically filled in from the deceased's death date.

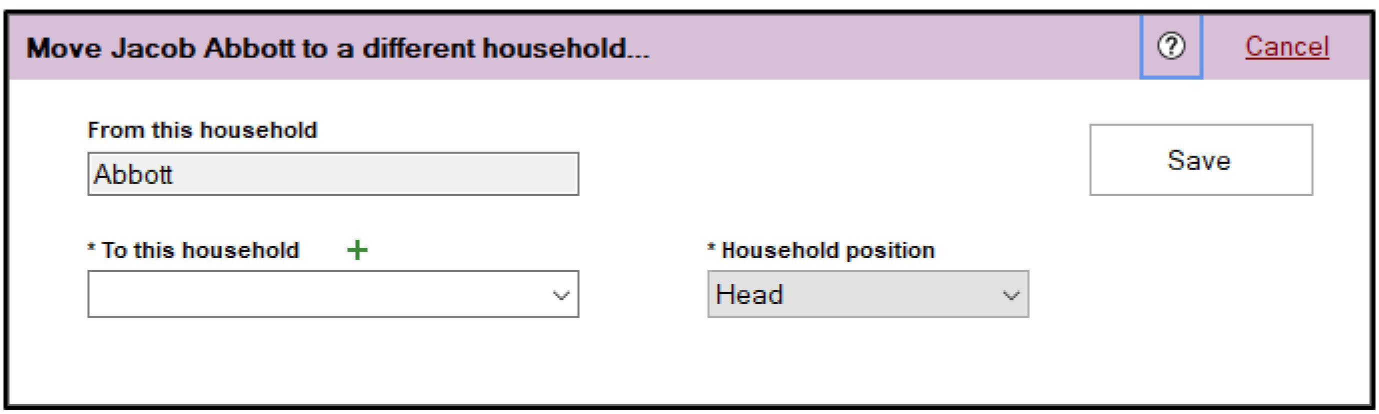
3. The surviving spouse is now changed to be the head of household of that household
4. The deceased's status in the household is changed from "Head of Household" to "Deceased"

6. If a person is marked as being removed by death, and they are marked as "Married" or "Separated" and that person is also marked as "Spouse" in their household position field and if there is a 'Head of Household" in the same household who is also marked as "Married" or "Separated", the following occurs:
    1. The surviving Head of Household is marked as "Widowed" in their marital status field
    2. The surviving Head of Household's "Date Widowed" field is filled in with the death date from the deceased "Spouse's" record.
    3. The deceased spouse's household position is set to "Deceased"

# Move a Person to a Different Household

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

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



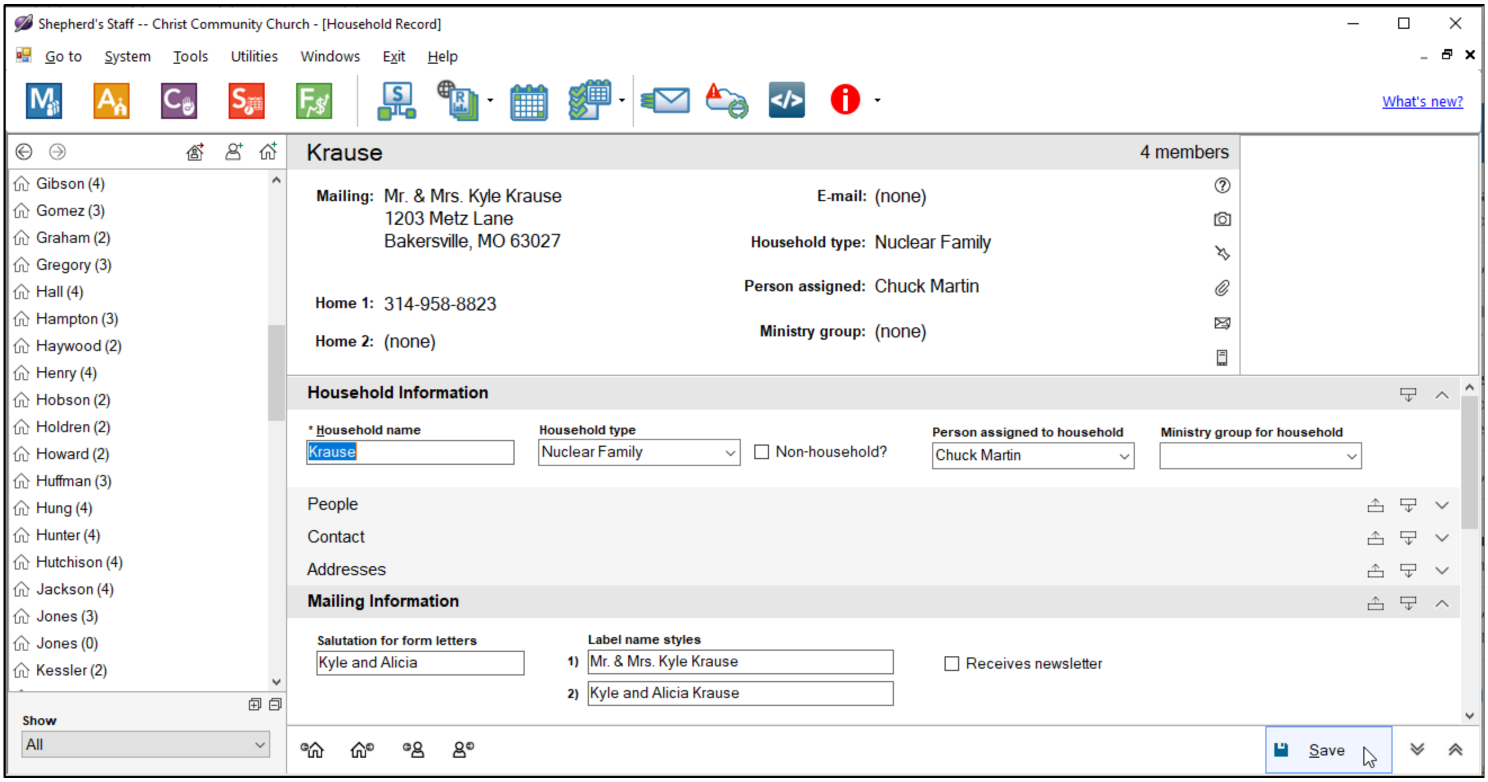
# How to Edit a Household Name

You may need to change the name of a Household due to a marriage or divorce, a legal name change, or simply because of a typo or misspelling of the name.  Editing a household name is simple, once you know where to do it.

To change a Household name, in the Membership module, go to the Households grid.

1. Select the Household in question and either double-click, or click the Edit button at the bottom of the grid to open the Household for editing.
2. Once in the Household record, the very first section will be headed with the Household name, and show an overview of the details of the household.
3. Directly below that is the section entitled "Household Information".  The first editable field is "Household name".
4. Simply type the correct or new name there, and click Save at the bottom-right of the page to complete the change.
5. You may also need to update the "Salutation" and "Label name styles" in the "Mailing Information" section of the Household record.

*Note that this will not change the last name of any individuals within the household.  You will need to make an equivalent change to the "*Last" field in the "Personal Information" section of the Individual record of anyone who's name may have changed or need correcting.


Shepherd's Staff -- Christ Community Church - [Household Record]
Go to System Tools Utilities Windows Exit Help
What's new?
Gibson (4)
Gomez (3)
Graham (2)
Gregory (3)
Hall (4)
Hampton (3)
Haywood (2)
Henry (4)
Hobson (2)
Holdren (2)
Howard (2)
Huffman (3)
Hung (4)
Hunter (4)
Hutchison (4)
Jackson (4)
Jones (3)
Jones (0)
Kessler (2)
Show
All
Krause
4 members
Mailing: Mr. & Mrs. Kyle Krause
1203 Metz Lane
Bakersville, MO 63027
E-mail: (none)
Household type: Nuclear Family
Person assigned: Chuck Martin
Home 1: 314-958-8823
Home 2: (none)
Ministry group: (none)
Household Information
* Household name
Krause
Household type
Nuclear Family
Non-household?
Person assigned to household
Chuck Martin
Ministry group for household
People
Contact
Addresses
Mailing Information
Salutation for form letters
Kyle and Alicia
Label name styles
1) Mr. & Mrs. Kyle Krause
2) Kyle and Alicia Krause
Receives newsletter
Save

# Combine Duplicate Person Information

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

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

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

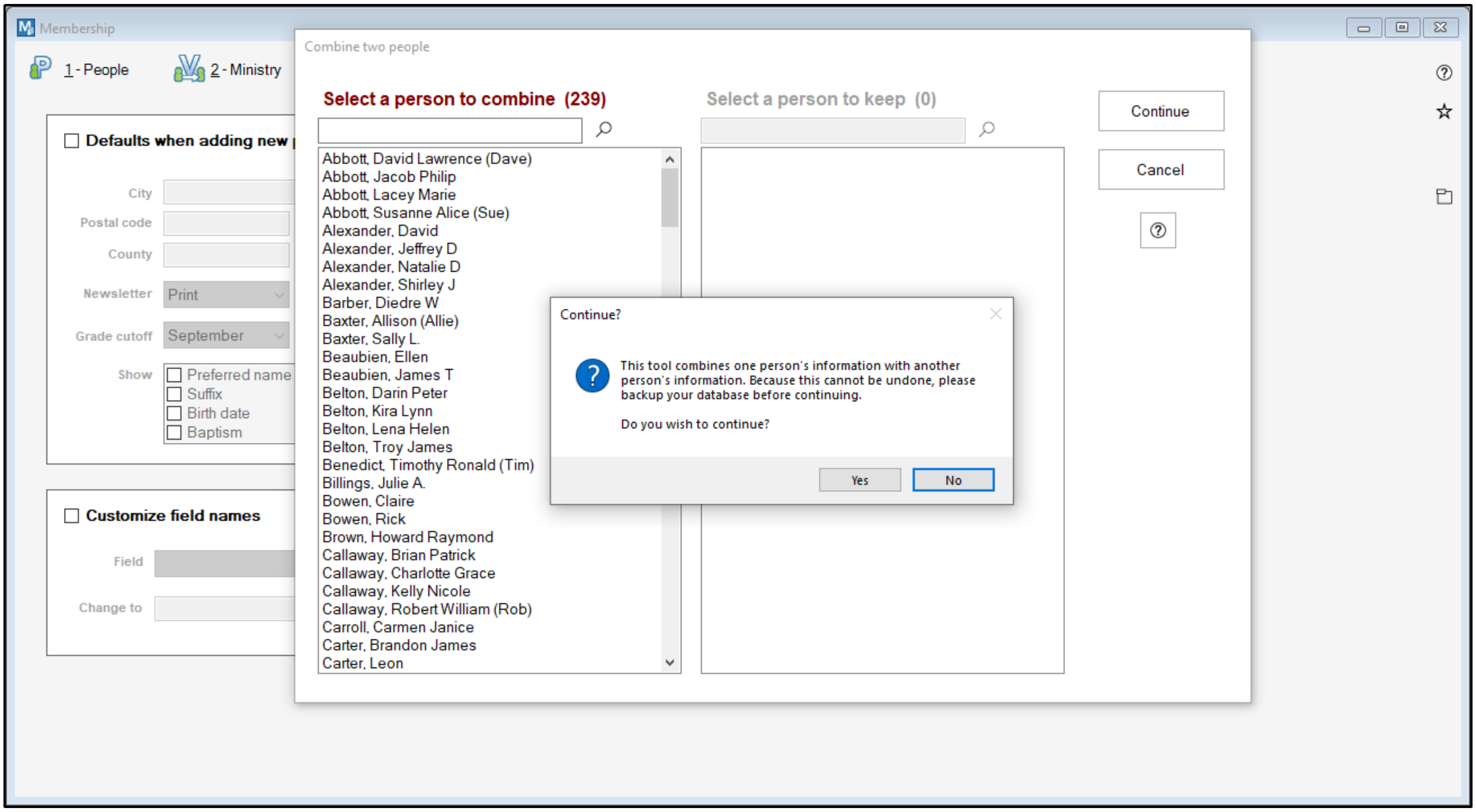
The person you select in the field under "Select a person to combine" is the person whose record will be deleted. All people will automatically appear in the field under "Select a person to keep". If you select someone with contribution records, after you click "OK" a notice will appear stating that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

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

Here is how to combine two people:

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

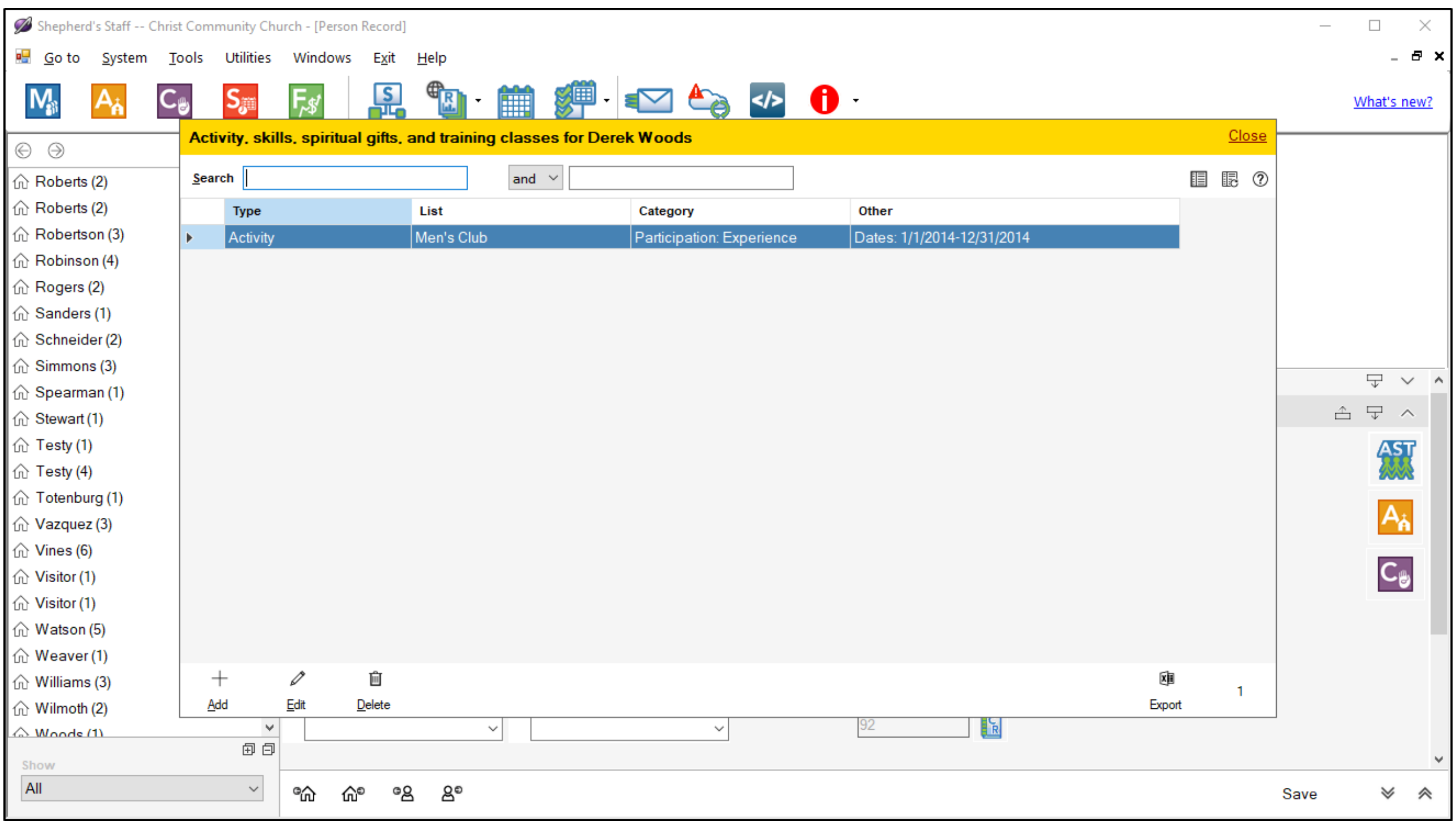
10. Click “OK” to close the window.



# Individual Activity, Skills, Spiritual Gifts and Training

At times, you may want to see just one person's involvement in activities at your church, or maybe you want to be able to see just that person's skills or training that they've had. From within that person's record, Shepherd's Staff provides you with a way to take a quick look at all of this information.

1. Open the Membership module, and under People > Individuals, find the person you want to view, and then double click on their name.
2. This will open their person record. Scroll down to the church section of their record and on the right side of the window, you will see a button labeled "AST" with three people under it. Click this button
3. The window that appears will show the activities, skills/spiritual gifts, and training for the person you selected in a grid.
4. If you want to add additional Activities, Skills/Spiritual Gifts, or Training, you can click the Add button at the bottom of the window, or, to edit an existing entry, click on it once to highlight it, and then click edit to edit that Activity, Skill/Spiritual Gift, or Training record.

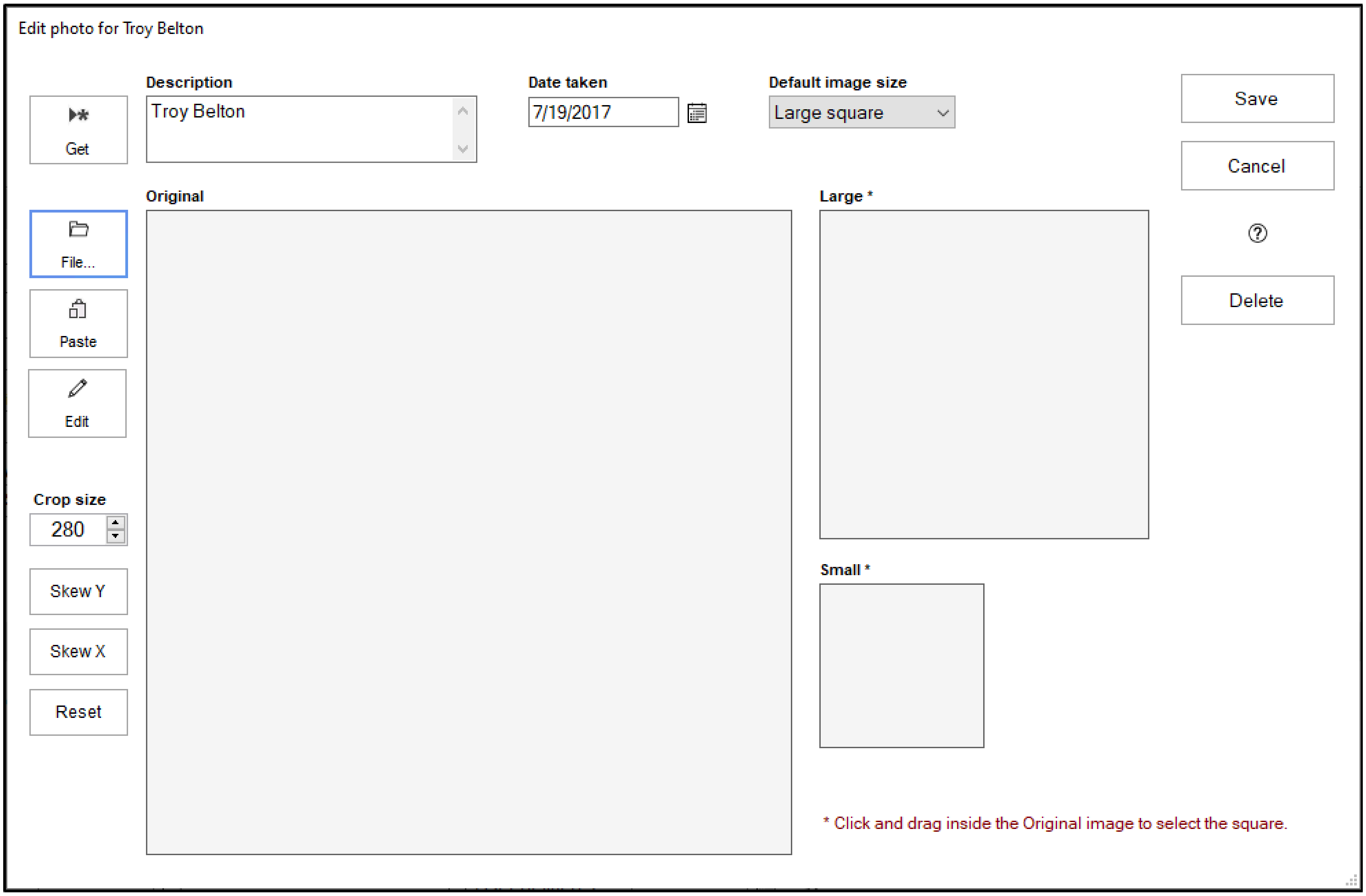


# Add an Individual Photo

You can add a photo to an Individual record in Membership. This will allow you to print photo directories, and to have an at-a-glance record to help you tie names and faces together. It's a great feature for larger congregations, and to get to know new members.

To add a photo to an Individual record, in the Membership module, go to the Individuals grid.

1. Select the Individual in question and either double-click, or click the Edit button at the bottom of the grid to open the record for editing.
2. Once in the individual record, you have two choices to get to the Photo Manager in the top section with the overview of the Individual's details.
    1. You can either click the camera icon in the list of icons toward the right side of the record.
    2. Or you can click in the big box to the right of that icon, which is where the image will display once you've added it.
3. Either of those options will bring up the "Edit Photo" box.
4. The "Get" button will pull a description from the record you were in when you clicked to open the box. This will likely already be filled in by default.
5. The "File" button is where you will click to browse to the location of the image file you want to add, or if you have copied it, you can use the paste button.
6. The "Edit" button will open the default Windows photo editor. You can make changes to the photo here, and once you save the photo inside the Windows photo editor, and come back to Shepherd's Staff, the changes you made in the photo editor will be reflected in Shepherd's Staff.
7. Once the image is there you can click and drag in the box marked "Original" and/or crop it using the options on the left until it is centered and looks right in the "Large" and "Small" boxes.
8. Click Cancel if you change your mind or Save to save your changes.
9. The Delete button is available to remove an image as needed.


Edit photo for Troy Belton
Get
Description
Troy Belton
Date taken
7/19/2017
Default image size
Large square
Save
Cancel
Original
Large *
File...
Delete
Paste
Edit
Crop size
280
Skew Y
Skew X
Reset
Small *
* Click and drag inside the Original image to select the square.

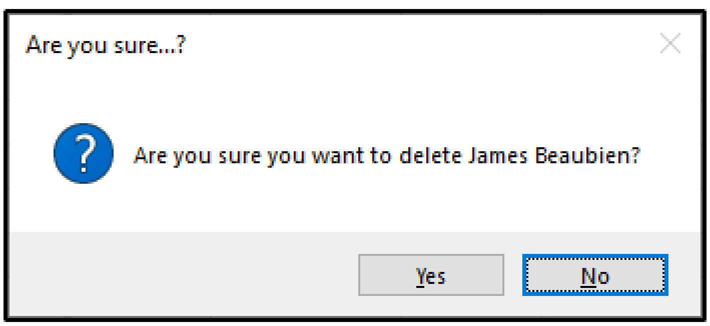
# Deleting a person

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

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

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

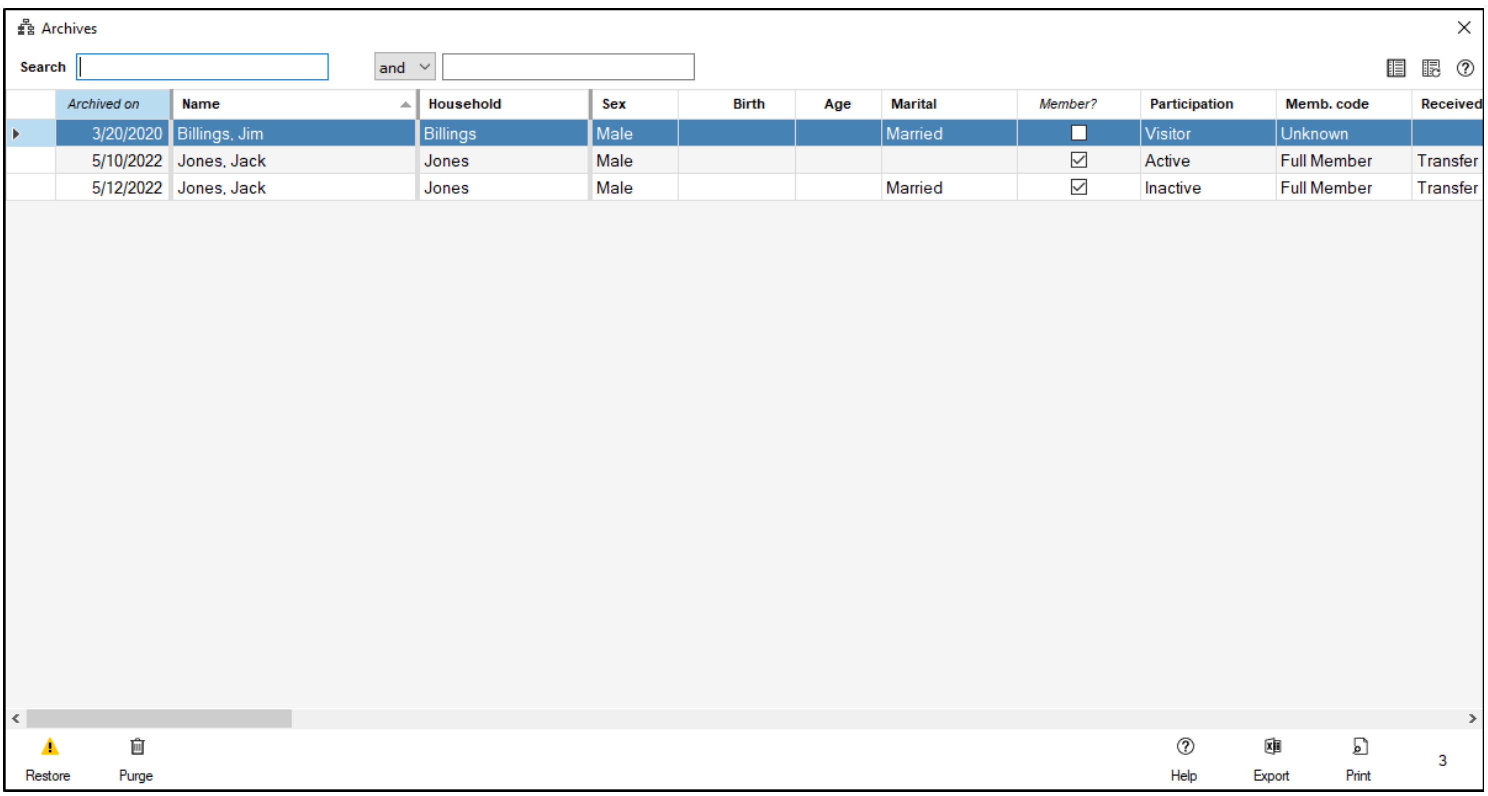
1. Open the Individuals Grid and highlight the Person record you wish to Delete.
2. Click the Delete button on the bottom of the grid.
3. Click "Yes" to confirm the deletion.



# View the Person Archive

The Person Archive is an area of Shepherd's Staff where records deleted directly from the Individuals view are placed. These people are not counted in any reports, will not appear in any subgroup, and for all intents and purposes, are separated from the rest of your database. You can view this archive, and either restore records into the database or delete them permanently from your system.

1. To access the Archive, open the Membership Module, and click on the "Tools/Settings" tab.
2. In the Tools section make sure the "View the person archive" option is selected, and click "Start".
3. This will pull up the Archives window. In this window, you can see each person who has been archived, the date they were archived on, and other basic information about the person.
4. If you want to bring a person back into your database, click on them so they are highlighted, and then click the "Restore" button in the bottom left corner of the window. To delete them permanently from your database click the "Purge" button.



# Mass update Membership information

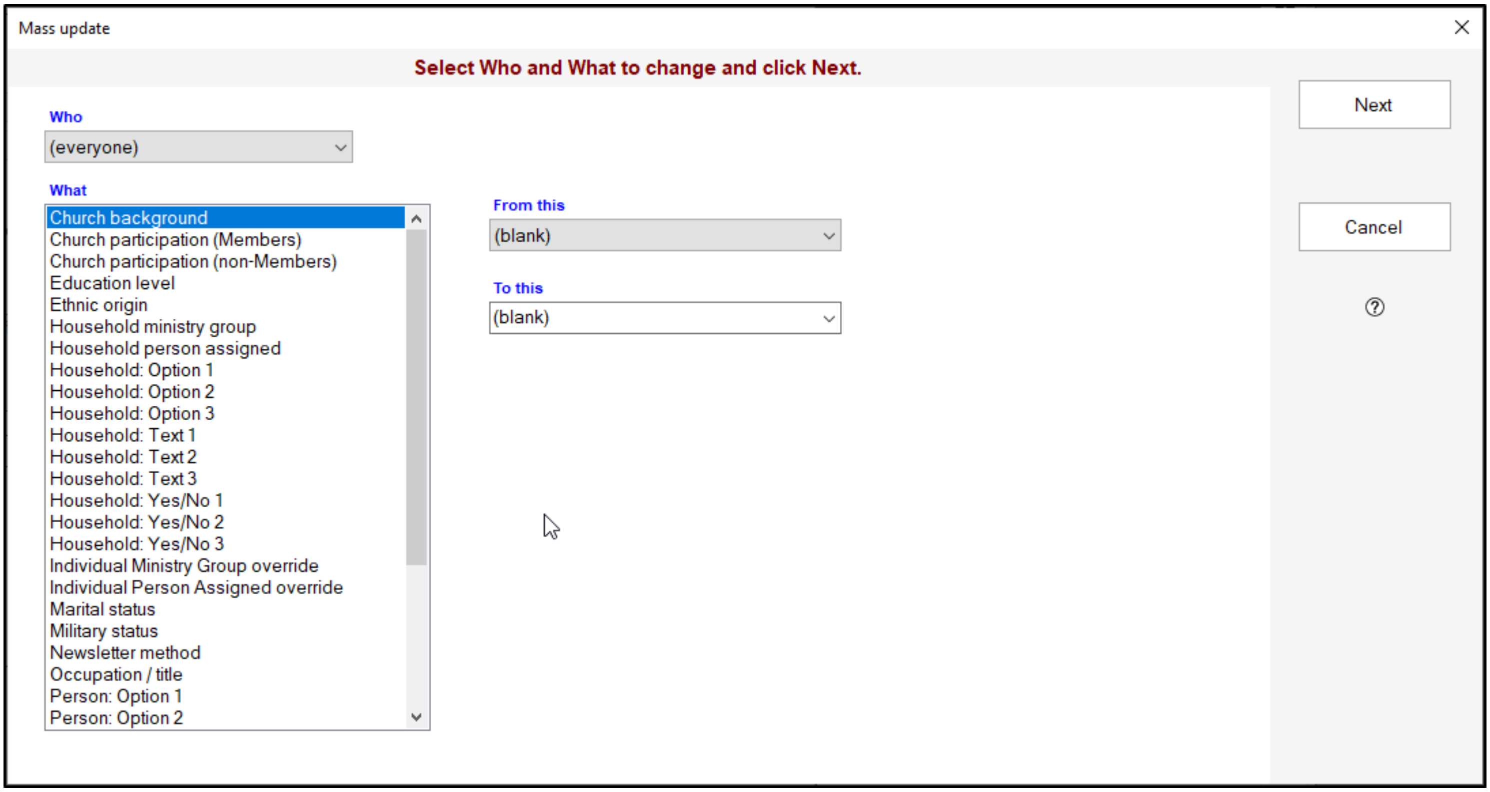
At times, you may find it necessary to update the same field on many different people or households at once. While you can go through each record and update the field in question for each and every record, this can quickly become a cumbersome process. Therefore, Shepherd's Staff offers the Mass update Membership information utility to quickly update data across multiple person or households at the same time.

Note: It is important that you make a backup of your Shepherd's Staff before you run this utility. Changes made by this utility cannot easily be undone without restoring a backup.

Note: Only users with supervisor-level access to the Membership module can run this utility.

1. Open the Membership module of Shepherd's Staff and click on "Tools/Settings"
2. In the Tools section, select "Mass update Membership information" and then click "Start"
3. Confirm that you have made a backup of your Shepherd's Staff database by clicking "Yes" at the window that appears.
4. In the window that appears, first, select the group of people you want to make a change on in the "Who" field. You can select a few pre-built groups, such as "All Members" or "Visitors", or you can select the "* For a subgroup" option to select a particular subgroup of people or the "* For a list or grade" option to select a particular activity/skill/training, Person Assigned/Ministry Group or School/Sunday School Grade group.
5. In the "What" field, you can select what field of information you're wanting to update. Several different options are available. Unless designated by "Household" as the first word of the field, all options will affect each person record in the group you selected in the "Who" field. For the household fields, the Household record of each person in the group you selected will be affected.
6. In the "From This" field, you're designating what option you want to be selected in the field you're choosing to update from the "What" field. Whatever you select in this field will be changed to whatever you select or enter in the "To this" field. Any other options in the field you selected in the "What" field will be unaffected.
    - Example: If you're updating "Received by", and you want to say everyone in the group you selected who has "Confession of Faith" to be changed to "Profession of Faith", in the "From this" field, you would pick "Confession of Faith", and in the "To this" field, you would select or enter "Profession of Faith"

7. Click "Next". This will show you each person or household record that will be updated by the change you are proposing. . If you want to move forward with this change, click "Continue". If you need to go back and make any changes to what you set up, click the "Back" button. And if you want to cancel this process entirely, click "Cancel"

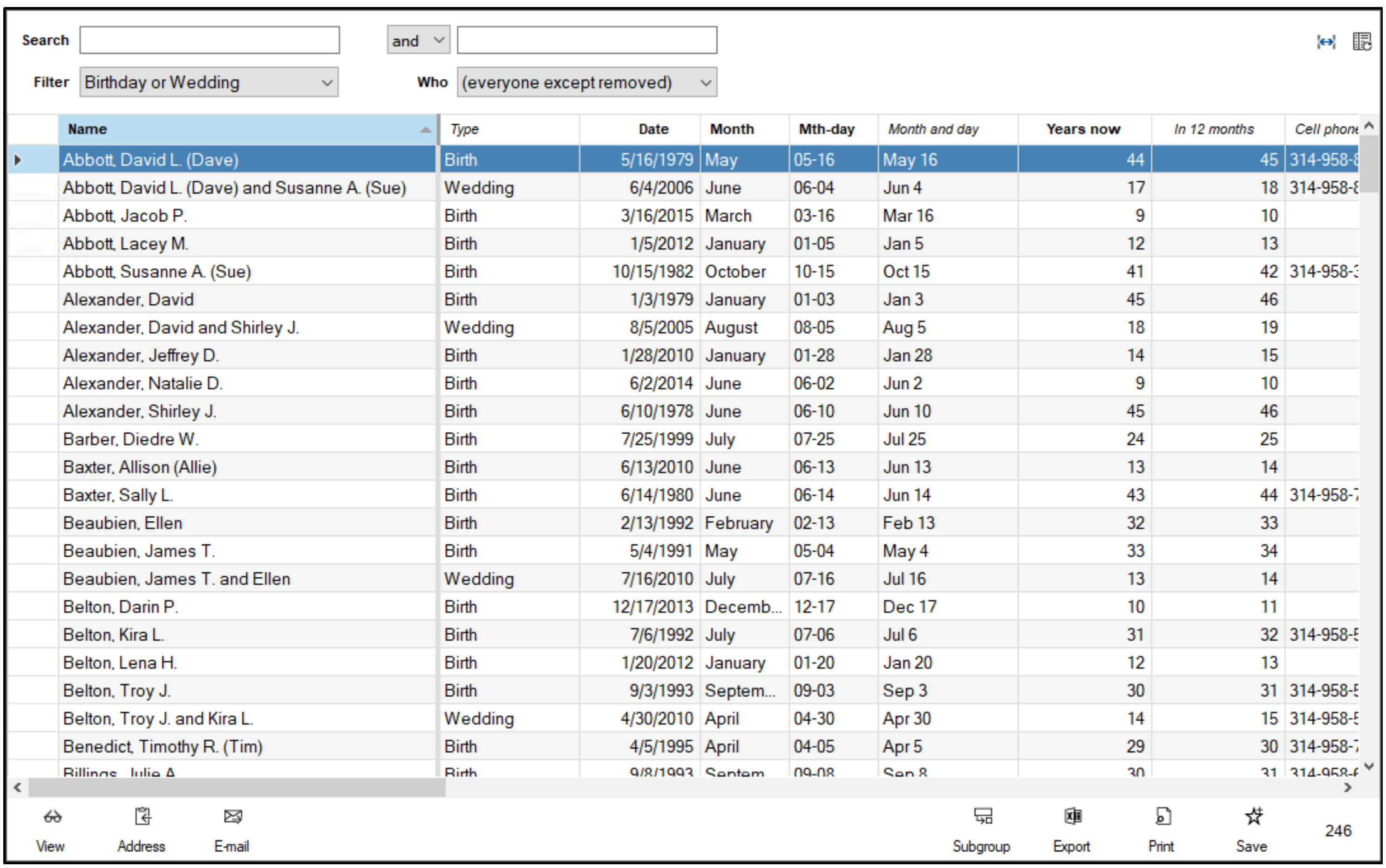


# Anniversaries Grid

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

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

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



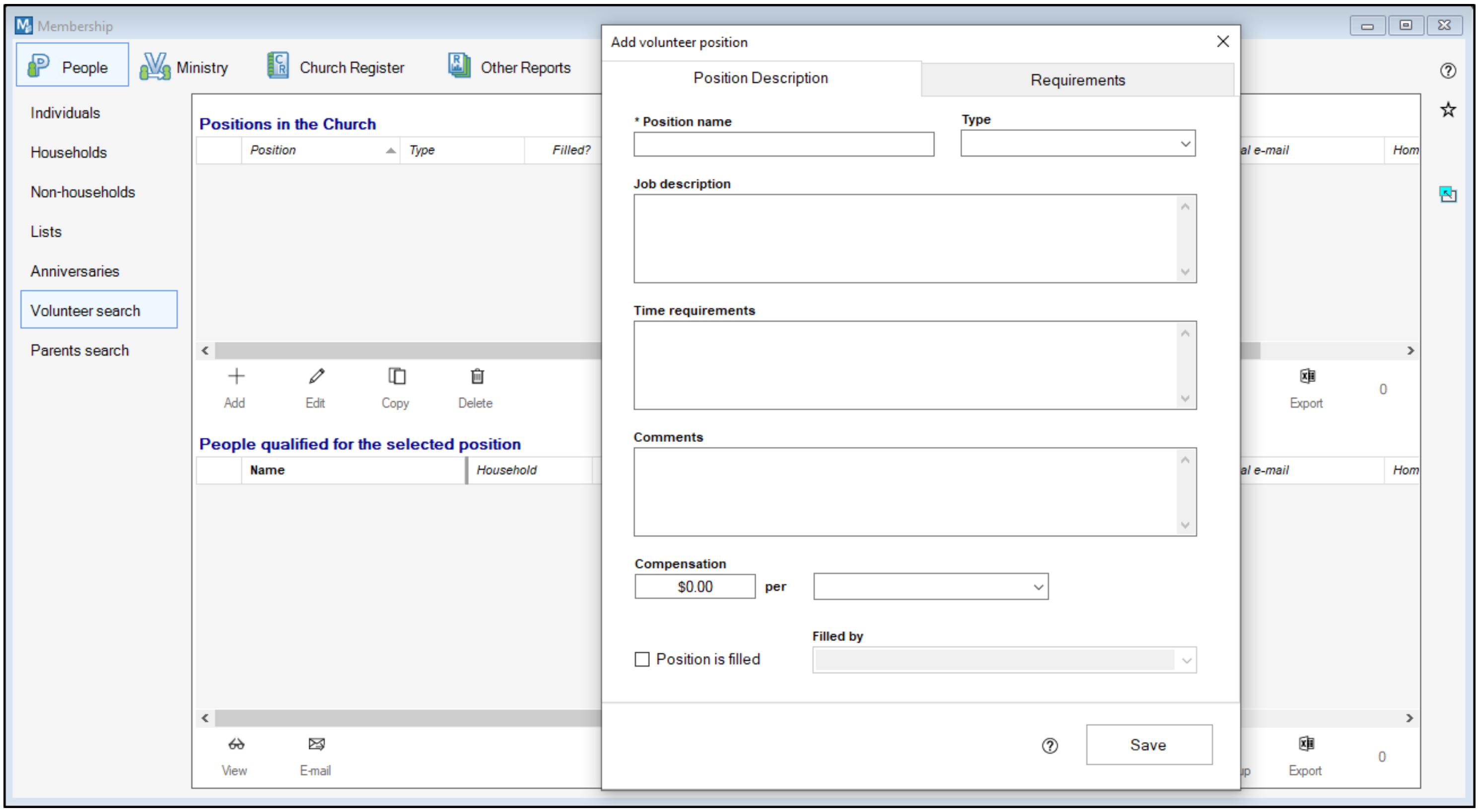

| Name | Type | Date | Month | Mth-day | Month and day | Years now | In 12 months | Cell phone |
|---|---|---|---|---|---|---|---|---|
| Abbott, David L. (Dave) | Birth | 5/16/1979 | May | 05-16 | May 16 | 44 | 45 | 314-958-8 |
| Abbott, David L. (Dave) and Susanne A. (Sue) | Wedding | 6/4/2006 | June | 06-04 | Jun 4 | 17 | 18 | 314-958-8 |
| Abbott, Jacob P. | Birth | 3/16/2015 | March | 03-16 | Mar 16 | 9 | 10 | |
| Abbott, Lacey M. | Birth | 1/5/2012 | January | 01-05 | Jan 5 | 12 | 13 | |
| Abbott, Susanne A. (Sue) | Birth | 10/15/1982 | October | 10-15 | Oct 15 | 41 | 42 | 314-958-3 |
| Alexander, David | Birth | 1/3/1979 | January | 01-03 | Jan 3 | 45 | 46 | |
| Alexander, David and Shirley J. | Wedding | 8/5/2005 | August | 08-05 | Aug 5 | 18 | 19 | |
| Alexander, Jeffrey D. | Birth | 1/28/2010 | January | 01-28 | Jan 28 | 14 | 15 | |
| Alexander, Natalie D. | Birth | 6/2/2014 | June | 06-02 | Jun 2 | 9 | 10 | |
| Alexander, Shirley J. | Birth | 6/10/1978 | June | 06-10 | Jun 10 | 45 | 46 | |
| Barber, Diedre W. | Birth | 7/25/1999 | July | 07-25 | Jul 25 | 24 | 25 | |
| Baxter, Allison (Allie) | Birth | 6/13/2010 | June | 06-13 | Jun 13 | 13 | 14 | |
| Baxter, Sally L. | Birth | 6/14/1980 | June | 06-14 | Jun 14 | 43 | 44 | 314-958-7 |
| Beaubien, Ellen | Birth | 2/13/1992 | February | 02-13 | Feb 13 | 32 | 33 | |
| Beaubien, James T. | Birth | 5/4/1991 | May | 05-04 | May 4 | 33 | 34 | |
| Beaubien, James T. and Ellen | Wedding | 7/16/2010 | July | 07-16 | Jul 16 | 13 | 14 | |
| Belton, Darin P. | Birth | 12/17/2013 | Decemb... | 12-17 | Dec 17 | 10 | 11 | |
| Belton, Kira L. | Birth | 7/6/1992 | July | 07-06 | Jul 6 | 31 | 32 | 314-958-5 |
| Belton, Lena H. | Birth | 1/20/2012 | January | 01-20 | Jan 20 | 12 | 13 | |
| Belton, Troy J. | Birth | 9/3/1993 | Septem... | 09-03 | Sep 3 | 30 | 31 | 314-958-5 |
| Belton, Troy J. and Kira L. | Wedding | 4/30/2010 | April | 04-30 | Apr 30 | 14 | 15 | 314-958-5 |
| Benedict, Timothy R. (Tim) | Birth | 4/5/1995 | April | 04-05 | Apr 5 | 29 | 30 | 314-958-7 |
| Billings, Julie A. | Birth | 9/8/1993 | Septem... | 09-08 | Sep 8 | 30 | 31 | 314-958-6 |

# Volunteer Search

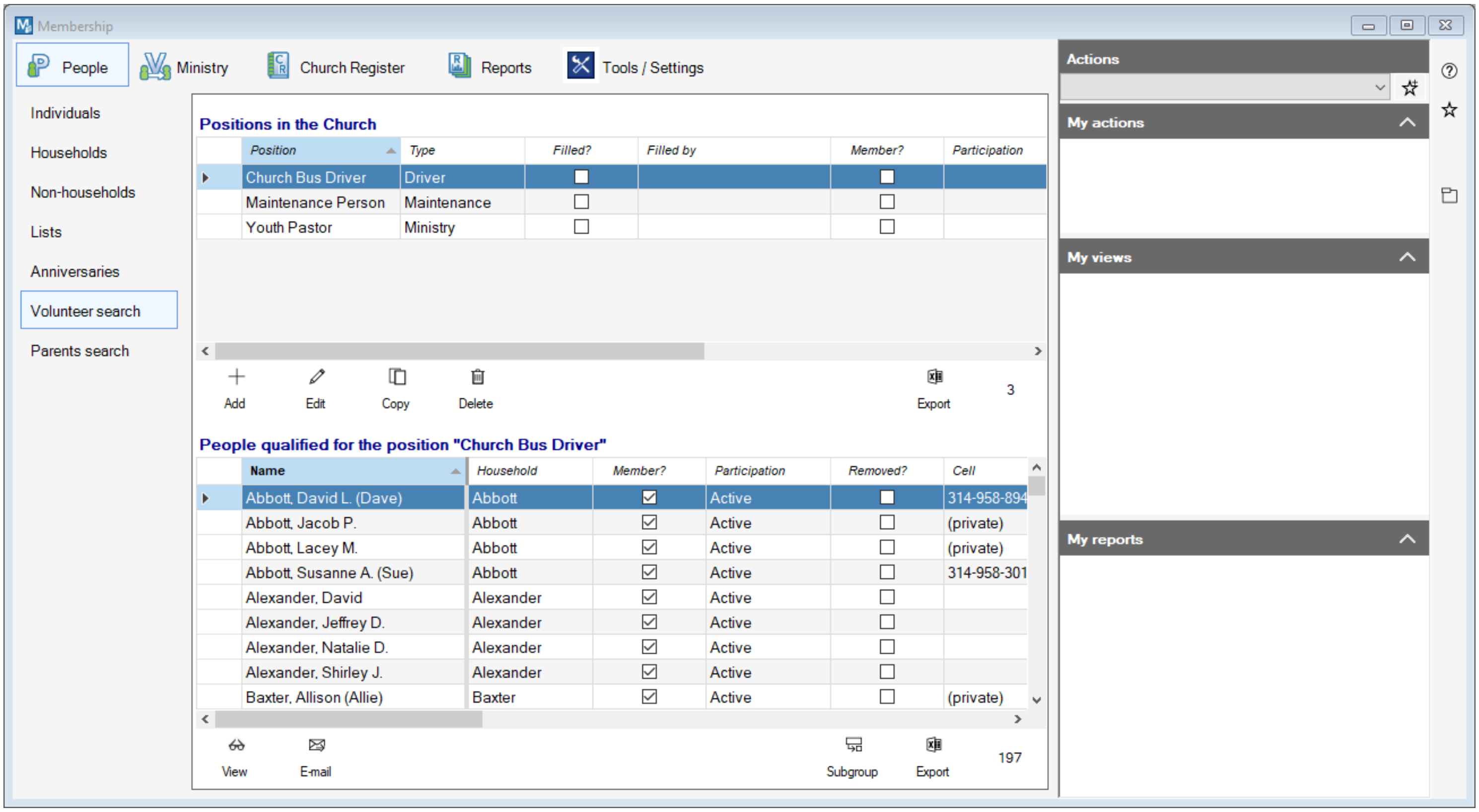
The Volunteer Search tool allows you to create positions for various jobs and roles within your church and then based on the criteria that you specify, find people within your database who would be a good fit for these positions.

Before you can make use of the Volunteer Search, you'll need to make positions at your church that need to be filled.

1. Access the Volunteer Search from the People Tab by clicking Volunteer Search.
2. Under the top window, labeled Positions in the Church, click the Add button to open the "Add volunteer position" window.
3. In this window, there are two tabs, Position Description, and Requirements. In the Position Description tab, fill in the name of the position in the "Position Name" field. The other fields are optional but can be filled in to provide additional information.
4. If this is a compensated position, fill in the amount of compensation in the Compensation field. In the "per" section, set the interval in which a person is paid.
5. If this position has been filled, check the "Position is filled" box. If you check this box, designate who fills this position in the "Filled by" field.
6. In the Requirements tab, click the Add button to set the criteria for this position. A window will appear where you can select an activity, skill/spiritual gift, or training a person can have to be considered for this position or not. Select the Activity, Skill/Gift, or Training by selecting the activity from the List Name and the Category/Type in the Category/Type field. Then, select if a person should or should not be on this list by selecting the "On this list" or "Not on this list" option. Click the Add button.
7. Repeat step 6 until all needed criteria have been added.
8. Under Miscellaneous requirements, you can designate if a person needs to be a member, not marked as removed, or in a particular subgroup to be considered.
9. Click Save when finished.




After you've added positions, people who meet the criteria you set in the "Requirements" tab of a position will appear in the "People qualified for the position" field of the "Positions in the Church" tab. Using this information, you can go back into a position by clicking on it, clicking the Edit button, and then fill that position in the "Filled by" field.



Membership
People
Ministry
Church Register
Reports
Tools / Settings
Individuals
Households
Non-households
Lists
Anniversaries
Volunteer search
Parents search
Positions in the Church
Position | Type | Filled? | Filled by | Member? | Participation
Church Bus Driver | Driver
Maintenance Person | Maintenance
Youth Pastor | Ministry
Add
Edit
Copy
Delete
Export
3
People qualified for the position "Church Bus Driver"
Name | Household | Member? | Participation | Removed? | Cell
Abbott, David L. (Dave) | Abbott | Active | 314-958-894
Abbott, Jacob P. | Abbott | Active | (private)
Abbott, Lacey M. | Abbott | Active | (private)
Abbott, Susanne A. (Sue) | Abbott | Active | 314-958-301
Alexander, David | Alexander | Active
Alexander, Jeffrey D. | Alexander | Active
Alexander, Natalie D. | Alexander | Active
Alexander, Shirley J. | Alexander | Active
Baxter, Allison (Allie) | Baxter | Active | (private)
View
E-mail
Subgroup
Export
197
Actions
My actions
My views
My reports

# Parents Search

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

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

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

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

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

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

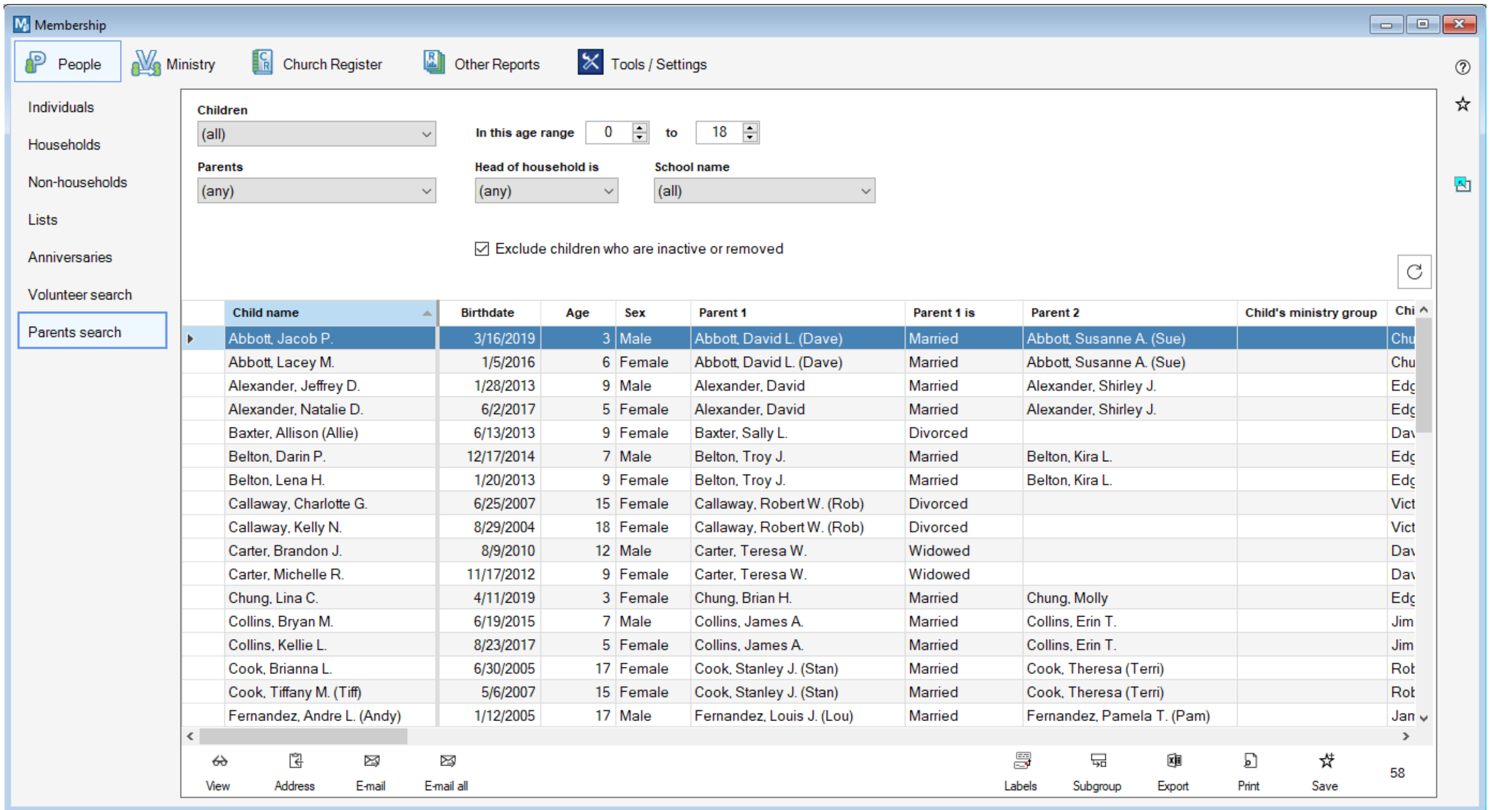
School name - This filter checks which School a child is enrolled in, based on what is filled out in the Work/School tab of their person record.

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

1. After selecting each filter you would like to use, Shepherd's Staff will automatically use this criteria to display the children who meet the criteria of the filters you selected.
2. Clicking the print button will allow you to print a report that shows the Child's name along with Membership, Contact and information on their Parents. You can group this report in different ways,

such as by Ministry Group or Sunday School Grade

3. Clicking the "Labels" button will take you to the mailing labels screen where you can print out mailing labels for just the people who are showing in your filters.



# Participation

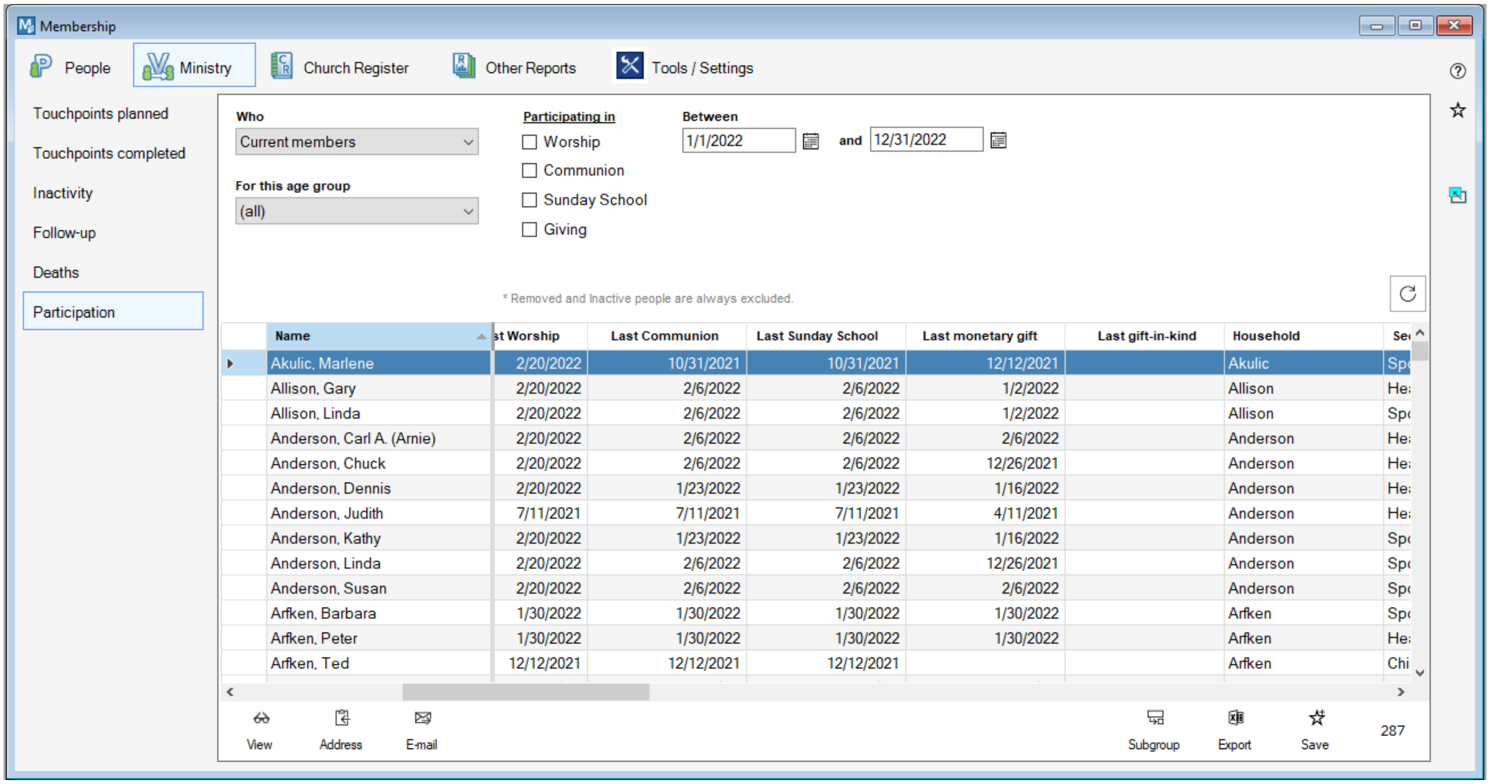
The Participation view allows you to search for people based on their participation in various event types over a time frame.  This view gives you information on when these people have last participated in various activities in the life of the church.

Access the Participation view by clicking on the Ministry Tab and choosing "Participation"

In the Participation view, select what filters you want to use.  These filters include:

- Who - This filter allows you to select from pre-defined groups of people, including Members or Visitors, as well as subgroups and lists/grades.
- For - This filter allows you to select an age range if you so choose.
- Participating in - This filter allows you to specify that you are interested in a specific event or activity of the church.  You can select from:
    - Worship
    - Communion
    - Sunday School
    - Giving
    - If you leave all boxes un-checked, it will filter for all of the above.
    - Between - This filter lets you set the date range of your search.

After selecting each filter you would like to use, Shepherd's Staff will automatically use the selected criteria to display the people who meet the criteria of the filters you selected.




1. Clicking View will take you to the person record of the person you have highlighted in the grid.
2. If you click Address, the individual's name and mailing address will be copied to the Windows clipboard so you can paste it into a document, spreadsheet, email, etc.
3. Clicking E-mail will open a window to allow you to send an e-mail to the person in question, as long as their e-mail address is in their record.
4. Clicking the Subgroup button at the bottom of the window will allow you to create a Static Subgroup based on the names in the grid.
5. If you click Export, the contents of the grid will be exported to Excel.
6. Clicking Save will save your selections in My Views so you can come back to it as needed.

# Introduction to Touchpoints

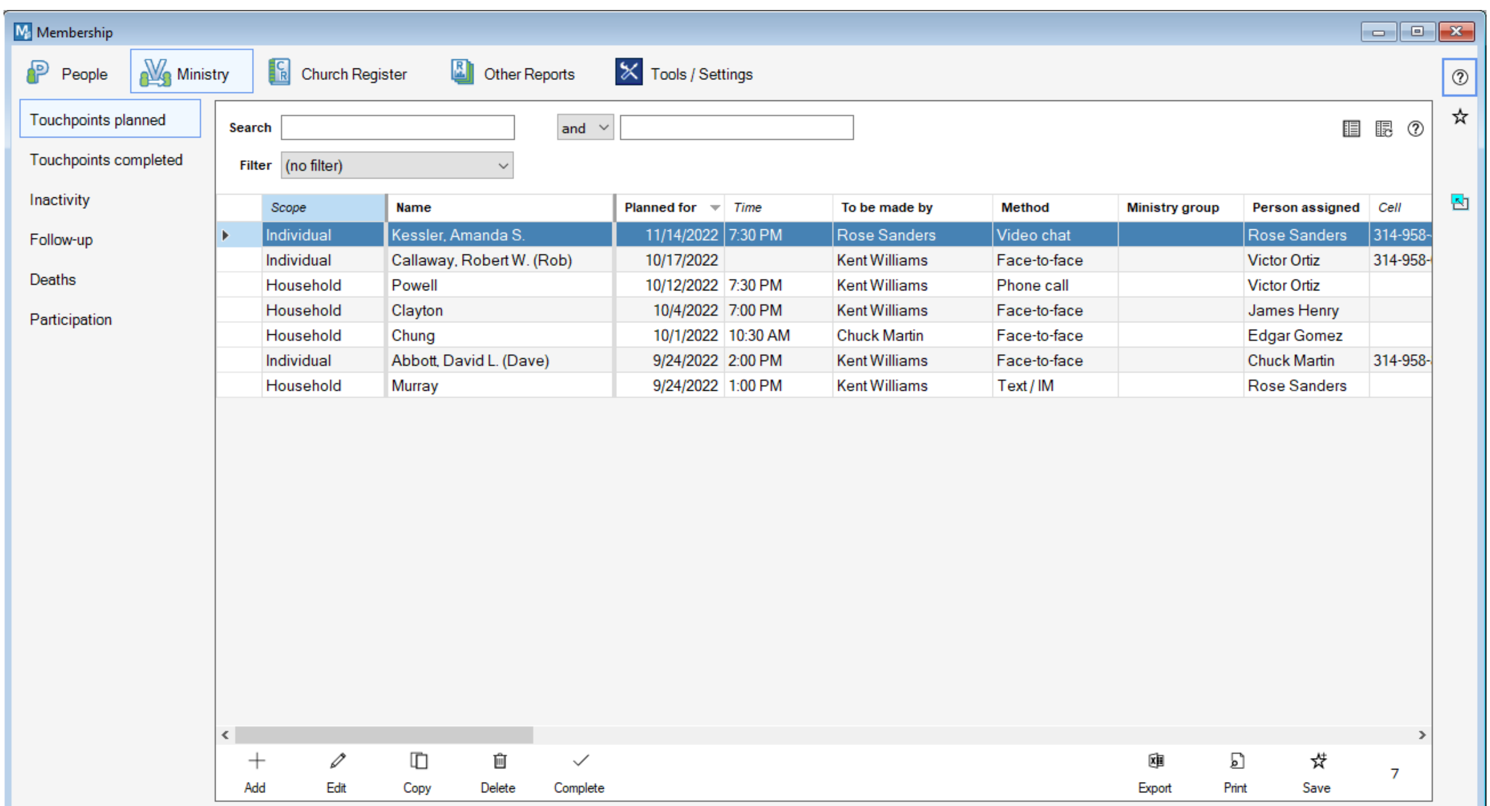
## Overview

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

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

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

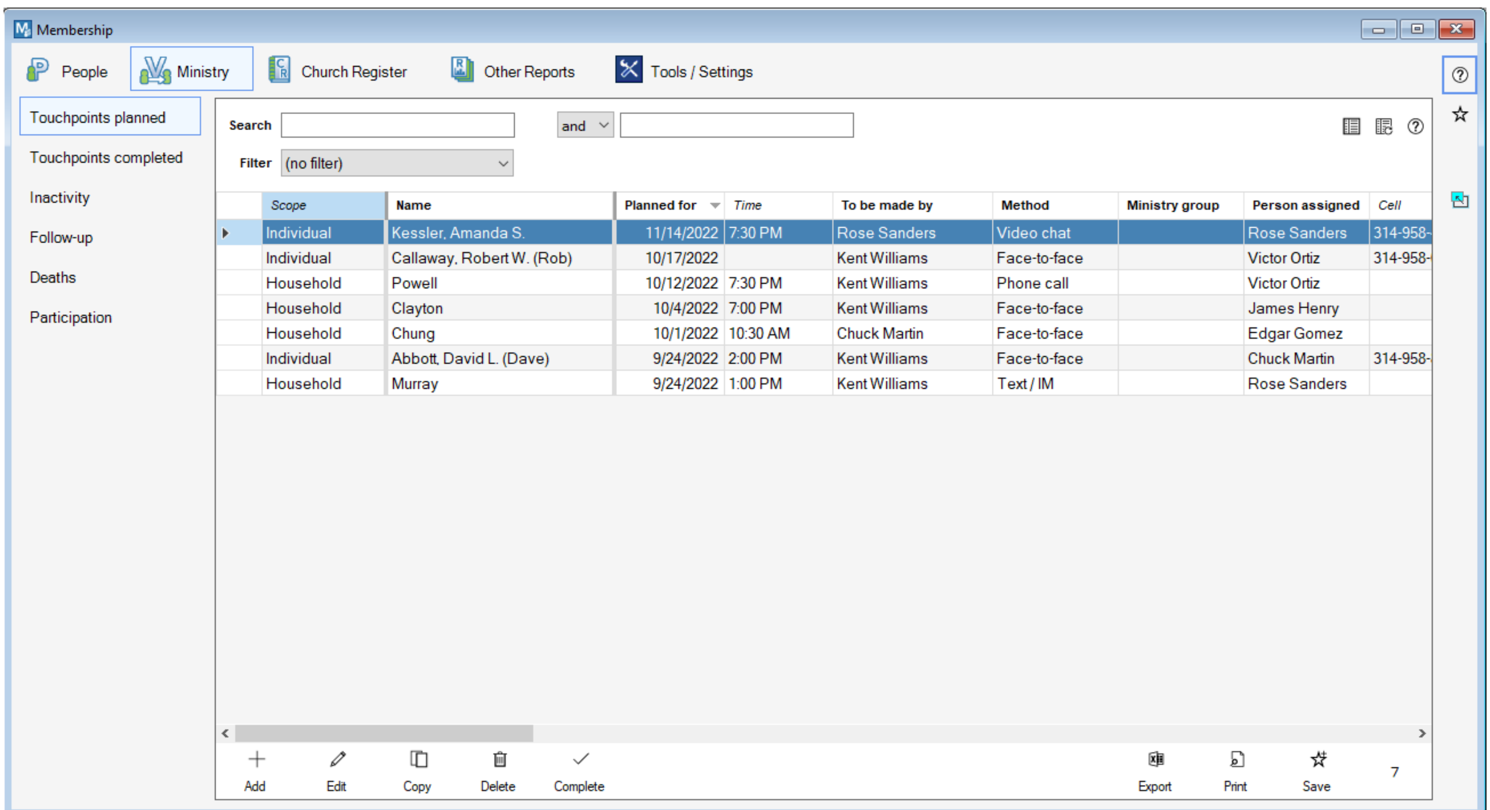
» Completed Touchpoints represent interactions you have had with a person or household. Entering completed touchpoints can be useful to your congregation because you can say what took place during this interaction, and have records of that in Shepherd's Staff.



# Touchpoints Planned

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

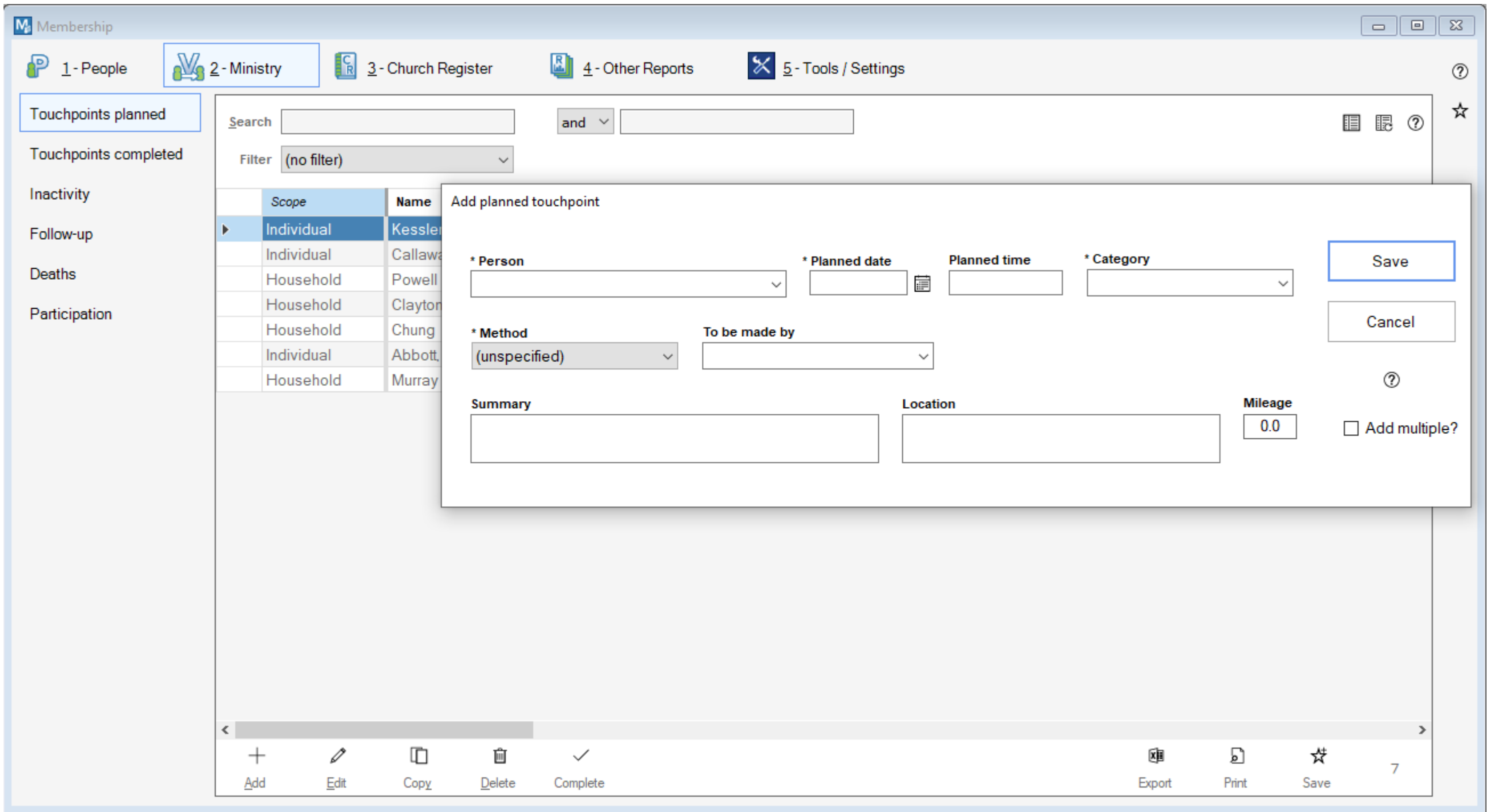
In addition to being able to add, edit, and delete planned touchpoints. You can also copy existing planned touchpoints by clicking the "Copy" button. Once a planned touchpoint has happened, you can click the "Complete" button to turn the planned touchpoint into a completed touchpoint.



# Add Planned Touchpoint

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

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

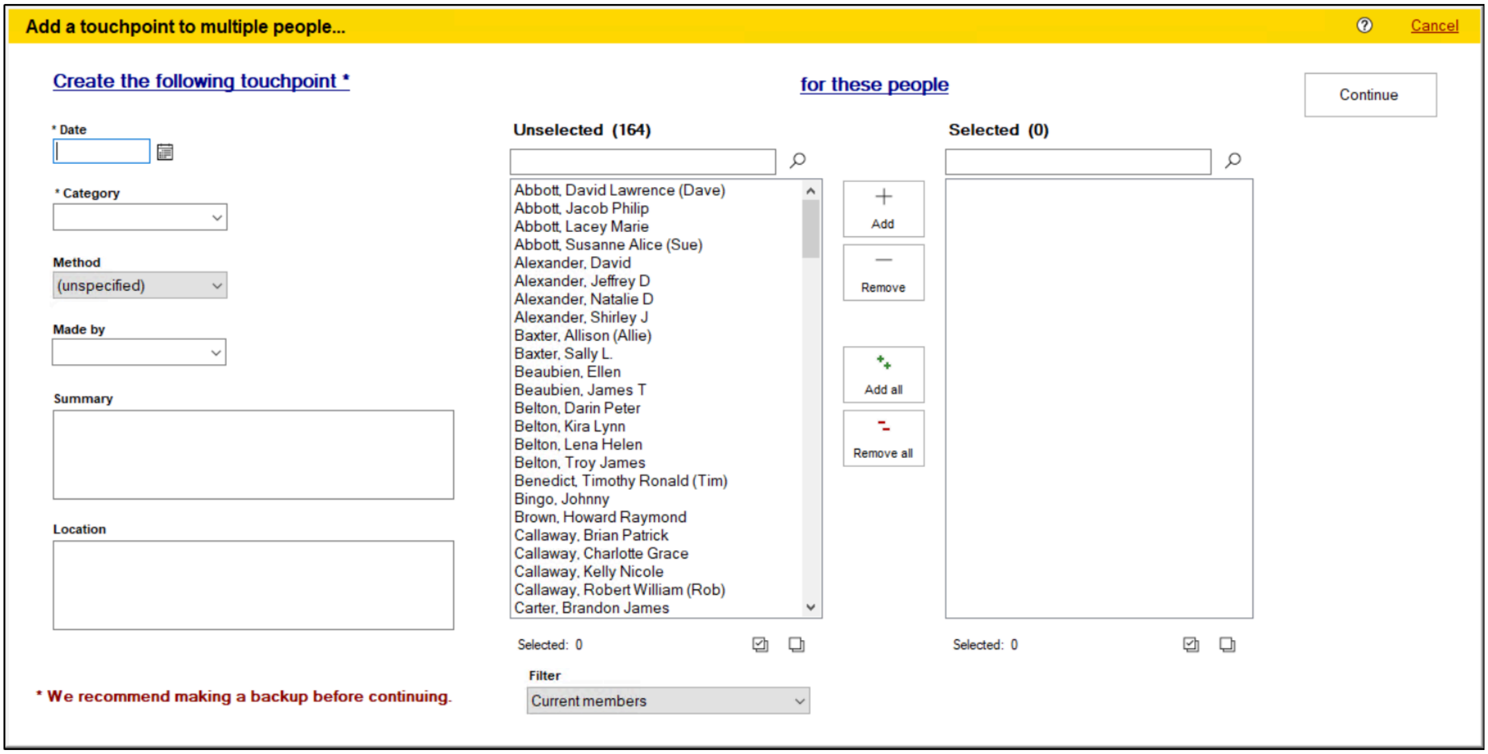

Membership
1 - People
2 - Ministry
3 - Church Register
4 - Other Reports
5 - Tools / Settings
Touchpoints planned
Touchpoints completed
Inactivity
Follow-up
Deaths
Participation
Search
and
Filter
(no filter)
Scope
Name
Individual
Kessler
Individual
Callawa
Household
Powell
Household
Clayton
Household
Chung
Individual
Abbott,
Household
Murray
Add planned touchpoint
* Person
* Planned date
Planned time
* Category
Save
Cancel
* Method
(unspecified)
To be made by
Summary
Location
Mileage
0.0
Add multiple?
Add
Edit
Copy
Delete
Complete
Export
Print
Save
7

# Multi-add Touchpoints

At times, you may want to add in a touchpoint for multiple people at your church at once, such as recording that an email was sent out to all of your members. The multi-add option for touchpoints makes this quick and easy to do.

**Note:** Because this cannot easily be undone, we recommend making a backup of your database before you start using the Multi-add Touchpoints utility. Instructions for making a backup of your database can be found here.

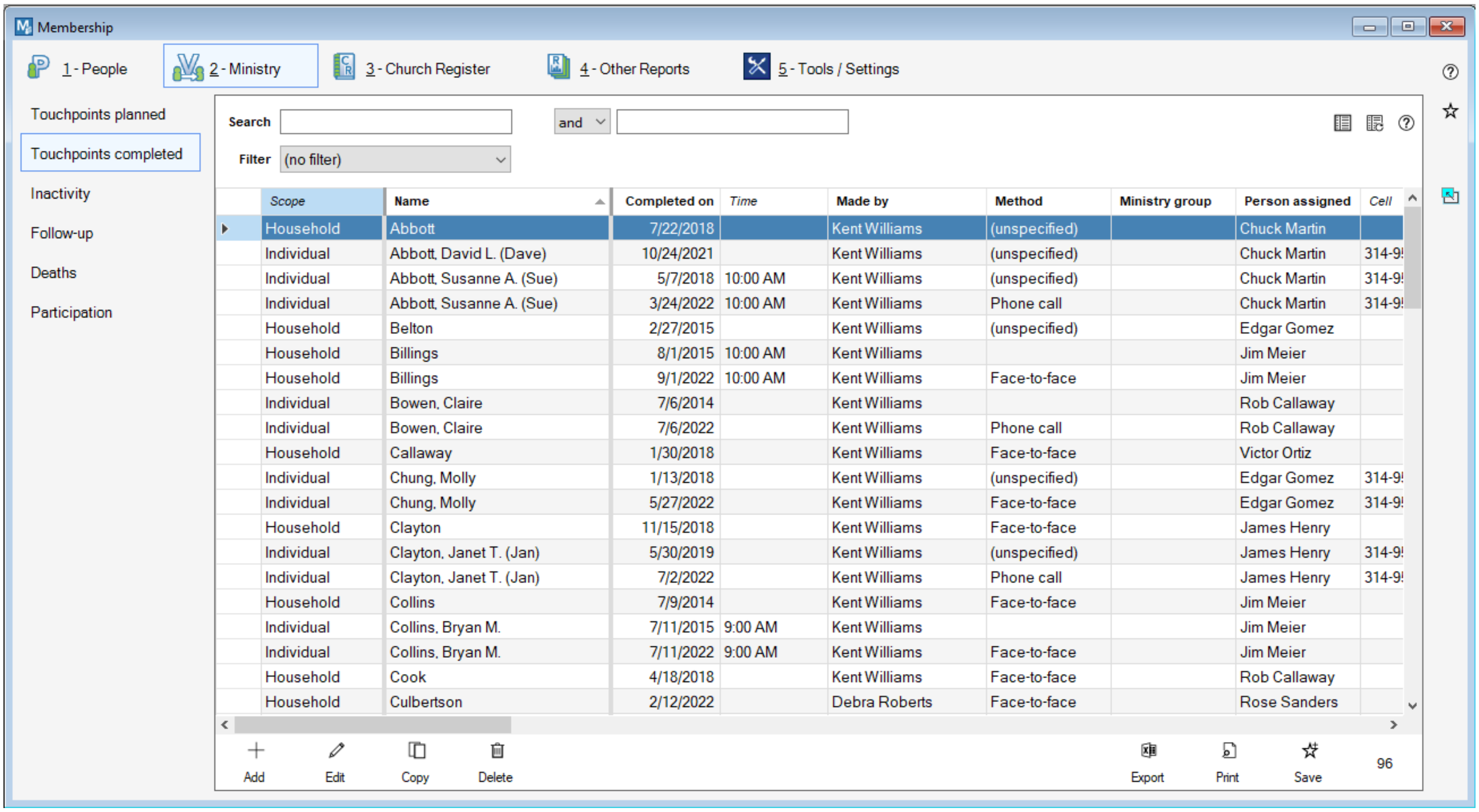
1. In the Membership module of Shepherd's Staff, click on the "Ministry" tab, and then select "Touchpoints Completed"
2. Click the "Multi-add" button at the bottom of the grid.
3. The "Add a touchpoint to multiple people" window will appear. Set the date for the touchpoint in the "Date" box, and you can select what kind of touchpoint this is in the "Category" box.
4. The "Method" box will let you select how this touchpoint is being made and the "Made by" box will let you select who is doing this touchpoint for the people you are working with
5. The "Summary" and "Location" fields will allow you to enter in a summary of what this touchpoint is all about and where this touchpoint took place respectively.
6. The Unselected column will show you all the people you have in the group selected in the "Filter" box. Clicking the filter box will let you select what group of people you want to work with.
7. To choose who you want to apply this touchpoint to, click on a person you want to select in the "Unselected" box, and then click the "Add" button. This will move this person to the "Selected" box.. To pick multiple people at once to move to the selected box, hold down the CTRL key on your keyboard as you click on the people in the "Unselected" box.
8. If you need to remove anyone from the "Selected" box, click on their name in the "Selected" box and click "Remove". You can pick multiple people to remove at once by holding down the CTRL key on your keyboard as you click on them.
9. Pressing the "Add All" button will move everyone from the "Unselected" box to the "Selected" box and clicking "Remove all" will do the opposite.
10. Click the "Continue" button. A prompt will appear asking you to confirm the details of this touchpoint. Click "Yes" to finish creating the touchpoints for the people you selected.


Add a touchpoint to multiple people...
Cancel
Create the following touchpoint *
for these people
Continue
* Date
* Category
Method
(unspecified)
Made by
Summary
Location
* We recommend making a backup before continuing.
Unselected (164)
Abbott, David Lawrence (Dave)
Abbott, Jacob Philip
Abbott, Lacey Marie
Abbott, Susanne Alice (Sue)
Alexander, David
Alexander, Jeffrey D
Alexander, Natalie D
Alexander, Shirley J
Baxter, Allison (Allie)
Baxter, Sally L.
Beaubien, Ellen
Beaubien, James T
Belton, Darin Peter
Belton, Kira Lynn
Belton, Lena Helen
Belton, Troy James
Benedict, Timothy Ronald (Tim)
Bingo, Johnny
Brown, Howard Raymond
Callaway, Brian Patrick
Callaway, Charlotte Grace
Callaway, Kelly Nicole
Callaway, Robert William (Rob)
Carter, Brandon James
Selected: 0
Filter
Current members
Add
Remove
Add all
Remove all
Selected (0)
Selected: 0

# Touchpoints Completed

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

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

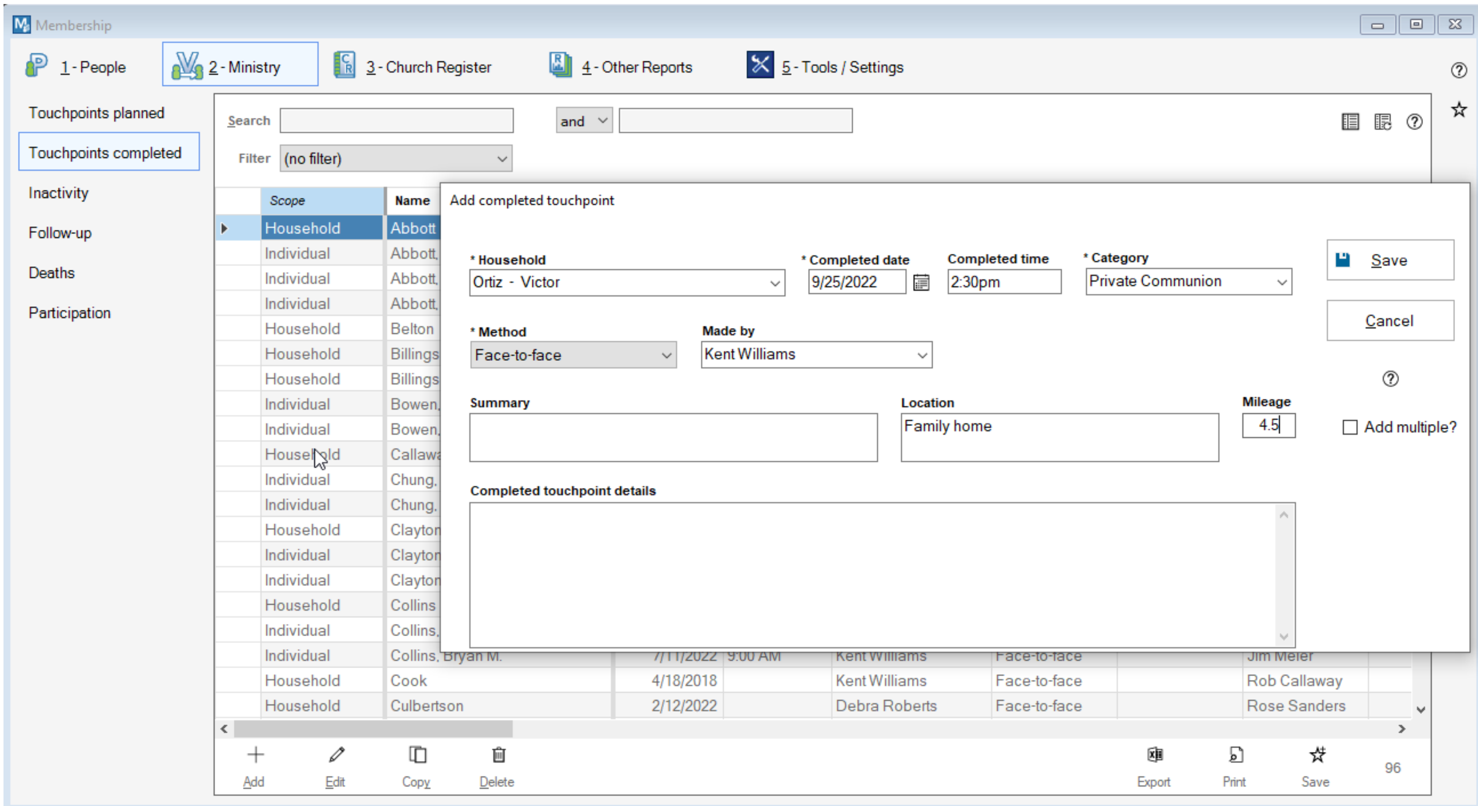



| Scope | Name | Completed on | Time | Made by | Method | Ministry group | Person assigned | Cell |
|---|---|---|---|---|---|---|---|---|
| Household | Abbott | 7/22/2018 | | Kent Williams | (unspecified) | | Chuck Martin | |
| Individual | Abbott, David L. (Dave) | 10/24/2021 | | Kent Williams | (unspecified) | | Chuck Martin | 314-9 |
| Individual | Abbott, Susanne A. (Sue) | 5/7/2018 | 10:00 AM | Kent Williams | (unspecified) | | Chuck Martin | 314-9 |
| Individual | Abbott, Susanne A. (Sue) | 3/24/2022 | 10:00 AM | Kent Williams | Phone call | | Chuck Martin | 314-9 |
| Household | Belton | 2/27/2015 | | Kent Williams | (unspecified) | | Edgar Gomez | |
| Household | Billings | 8/1/2015 | 10:00 AM | Kent Williams | | | Jim Meier | |
| Household | Billings | 9/1/2022 | 10:00 AM | Kent Williams | Face-to-face | | Jim Meier | |
| Individual | Bowen, Claire | 7/6/2014 | | Kent Williams | | | Rob Callaway | |
| Individual | Bowen, Claire | 7/6/2022 | | Kent Williams | Phone call | | Rob Callaway | |
| Household | Callaway | 1/30/2018 | | Kent Williams | Face-to-face | | Victor Ortiz | |
| Individual | Chung, Molly | 1/13/2018 | | Kent Williams | (unspecified) | | Edgar Gomez | 314-9 |
| Individual | Chung, Molly | 5/27/2022 | | Kent Williams | Face-to-face | | Edgar Gomez | 314-9 |
| Household | Clayton | 11/15/2018 | | Kent Williams | Face-to-face | | James Henry | |
| Individual | Clayton, Janet T. (Jan) | 5/30/2019 | | Kent Williams | (unspecified) | | James Henry | 314-9 |
| Individual | Clayton, Janet T. (Jan) | 7/2/2022 | | Kent Williams | Phone call | | James Henry | 314-9 |
| Household | Collins | 7/9/2014 | | Kent Williams | Face-to-face | | Jim Meier | |
| Individual | Collins, Bryan M. | 7/11/2015 | 9:00 AM | Kent Williams | | | Jim Meier | |
| Individual | Collins, Bryan M. | 7/11/2022 | 9:00 AM | Kent Williams | Face-to-face | | Jim Meier | |
| Household | Cook | 4/18/2018 | | Kent Williams | Face-to-face | | Rob Callaway | |
| Household | Culbertson | 2/12/2022 | | Debra Roberts | Face-to-face | | Rose Sanders | |

# Add Completed Touchpoint

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

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

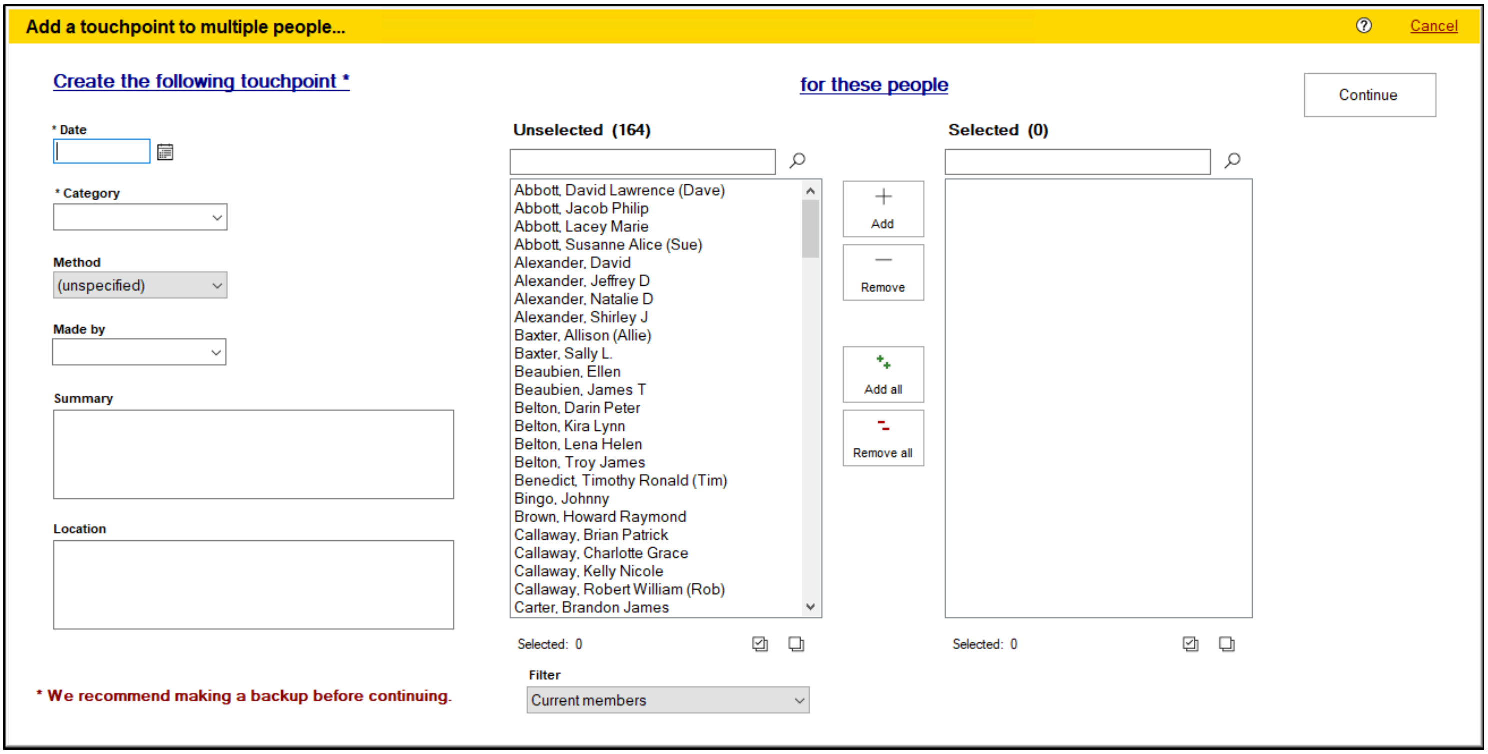

Membership
1 - People
2 - Ministry
3 - Church Register
4 - Other Reports
5 - Tools / Settings
Touchpoints planned
Touchpoints completed
Inactivity
Follow-up
Deaths
Participation
Search
and
Filter
(no filter)
Scope
Name
Add completed touchpoint
* Household
Ortiz - Victor
* Completed date
9/25/2022
Completed time
2:30pm
* Category
Private Communion
Save
Cancel
* Method
Face-to-face
Made by
Kent Williams
Summary
Location
Family home
Mileage
4.5
Add multiple?
Completed touchpoint details
Household Abbott
Individual Abbott,
Individual Abbott,
Individual Abbott,
Household Belton
Household Billings
Household Billings
Individual Bowen,
Individual Bowen,
Household Callaw
Individual Chung,
Individual Chung,
Household Clayton
Individual Clayton
Individual Clayton
Household Collins
Individual Collins,
Individual Collins, Bryan M. 7/11/2022 9:00 AM Kent Williams Face-to-face Jim Meier
Household Cook 4/18/2018 Kent Williams Face-to-face Rob Callaway
Household Culbertson 2/12/2022 Debra Roberts Face-to-face Rose Sanders
Add
Edit
Copy
Delete
Export
Print
Save
96

# Multi-Add for Completed Touchpoints

At times, you may want the ability to record a group of completed touchpoints all at once, such as noting that you sent out a mass email or mailing to a group of your members. The "Multi-Add' function for completed touchpoints allows you to complete this task quickly and easily.

**Note:** We strongly recommend making a backup of your database before you use this feature, as it cannot be easily reversed without restoring a backup. For instructions on making a backup, see our article on creating a backup.

1. In the Membership module, click on the "Ministry" tab, and then click on "Touchpoints completed" to access the Completed Touchpoints grid.
2. Click the "Multi-add" button at the bottom of the grid.
3. In the window that appears, first set the date for this touchpoint in the "Date" field.
4. In the "Category" field, select what kind of touchpoint this will be. You can edit the options in this droplist if needed.
5. The "Method" field will let you select how this touchpoint is being carried out, and the "Made by" field will let you say who is making this touch point. The "Made by" field can be edited like the "Category" field.
6. The "Summary" and "Location" fields can provide additional context and information about this touchpoint.
7. In the "for these people" section, you can pick which people should be included for this touch point. The "Filter' box below the "Unselected" section will let you pick what group of people you want to be able to pick from.
8. Click on the name of a person you want to add a completed touchpoint for in the "Unselected" box, and then click the "Add" button to add them to the "Selected" section. If you hold down the CTRL key on your keyboard as you click on a person, you can select multiple people at once. If you need to remove anyone from the "Selected" section, click on their name and then click the "Remove" button. The "Add all" button will take everyone in the "Unselected" section and move them to the "Selected" section and the "Remove all" button will take everyone in the "Selected" section and move them to the "Unselected" section.
9. Click "Continue" and confirm the details of the touchpoint you are adding in the window that appears by clicking "Yes"

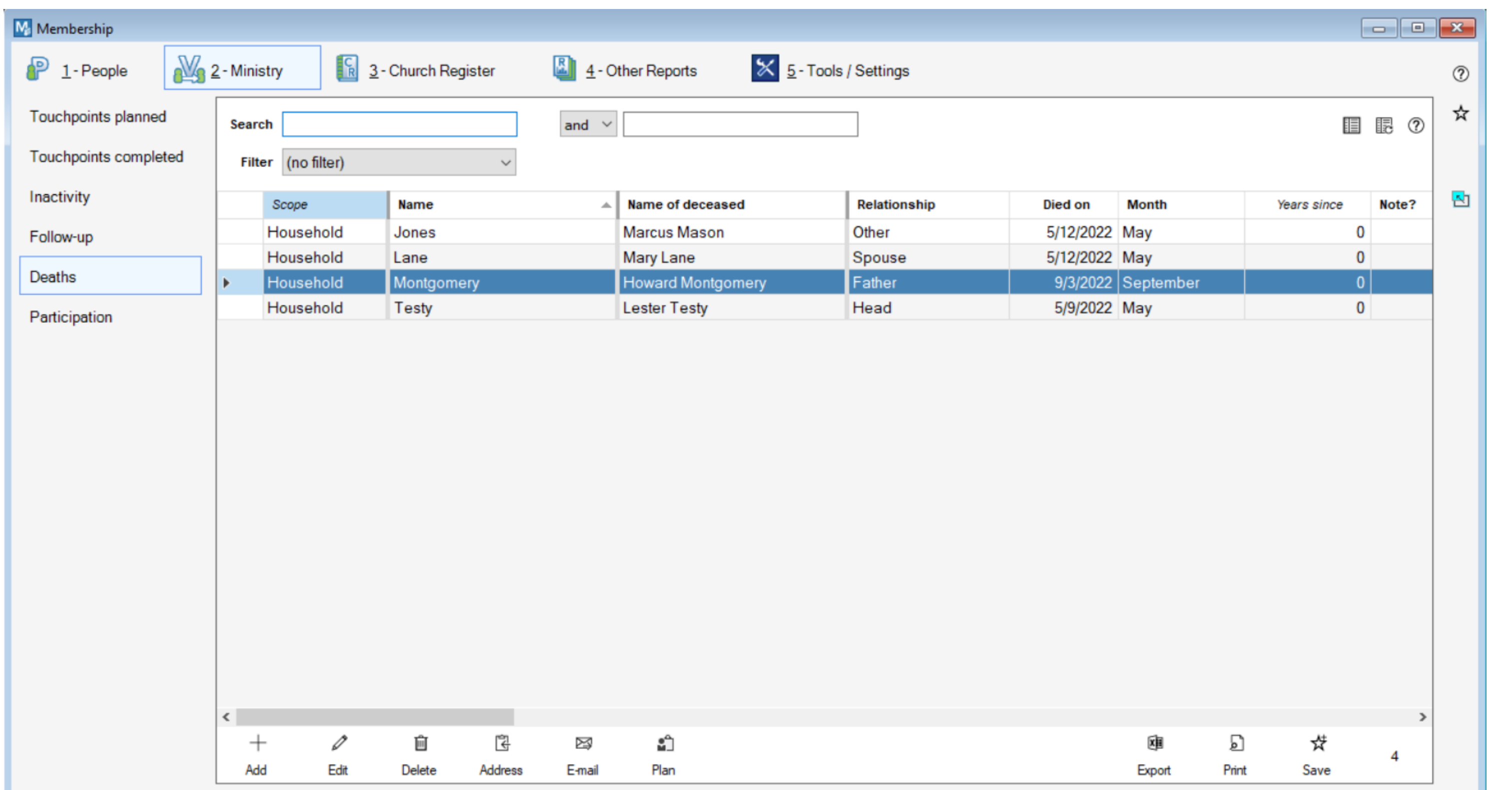

Add a touchpoint to multiple people...
Cancel
Create the following touchpoint *
for these people
Continue
* Date
* Category
Method
(unspecified)
Made by
Summary
Location
Unselected (164)
Abbott, David Lawrence (Dave)
Abbott, Jacob Philip
Abbott, Lacey Marie
Abbott, Susanne Alice (Sue)
Alexander, David
Alexander, Jeffrey D
Alexander, Natalie D
Alexander, Shirley J
Baxter, Allison (Allie)
Baxter, Sally L.
Beaubien, Ellen
Beaubien, James T
Belton, Darin Peter
Belton, Kira Lynn
Belton, Lena Helen
Belton, Troy James
Benedict, Timothy Ronald (Tim)
Bingo, Johnny
Brown, Howard Raymond
Callaway, Brian Patrick
Callaway, Charlotte Grace
Callaway, Kelly Nicole
Callaway, Robert William (Rob)
Carter, Brandon James
Selected: 0
Add
Remove
Add all
Remove all
Selected (0)
Selected: 0
Filter
Current members
* We recommend making a backup before continuing.

# Deaths

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

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

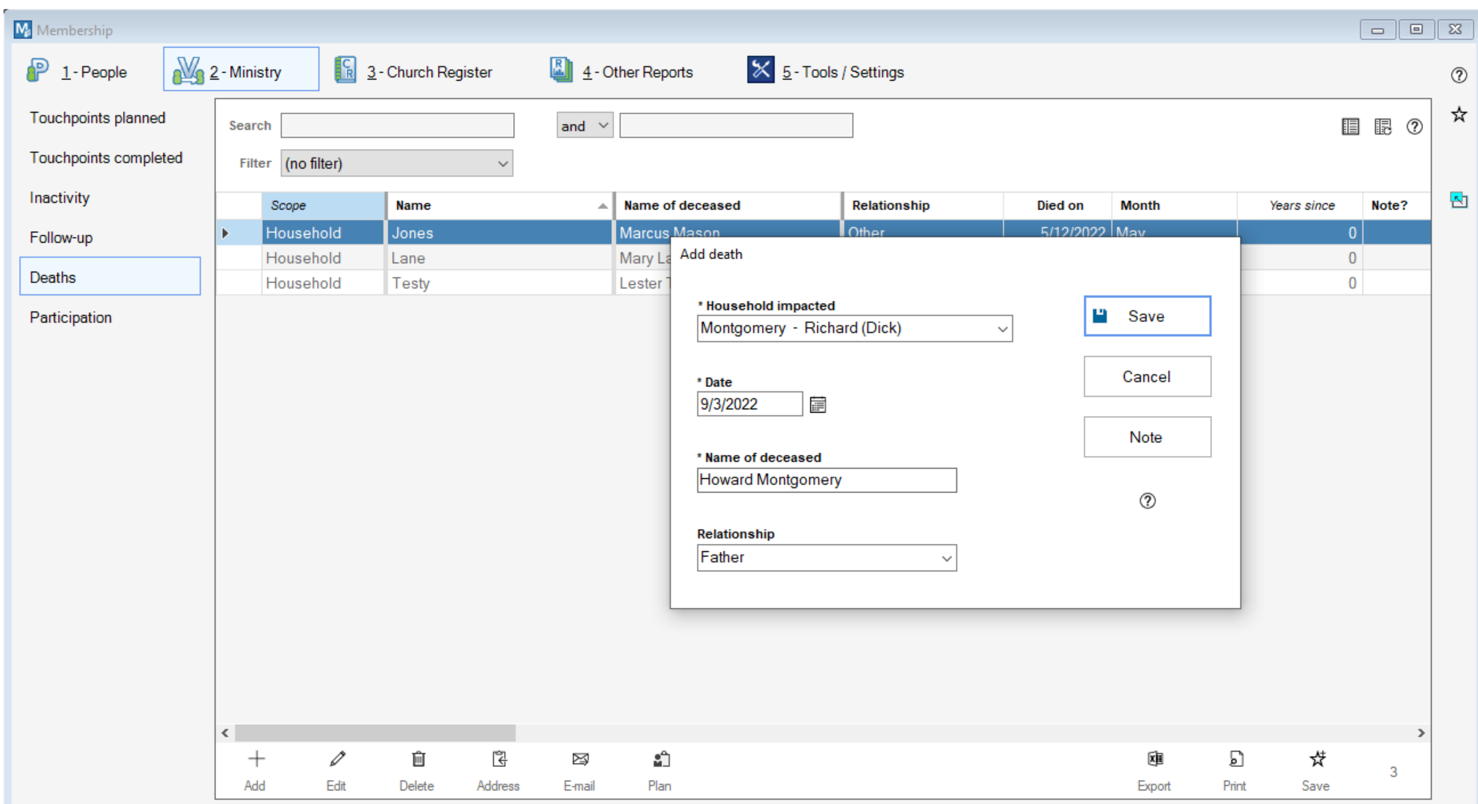
In addition to being able to add, edit and delete information on deaths, you can also copy an individual or household's address by selecting their significant death record and then clicking the "Address" button at the bottom of the grid. You can email the individual or household in the same way, by clicking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



# Add/Edit Deaths

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

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



# Inactivity

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

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

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

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

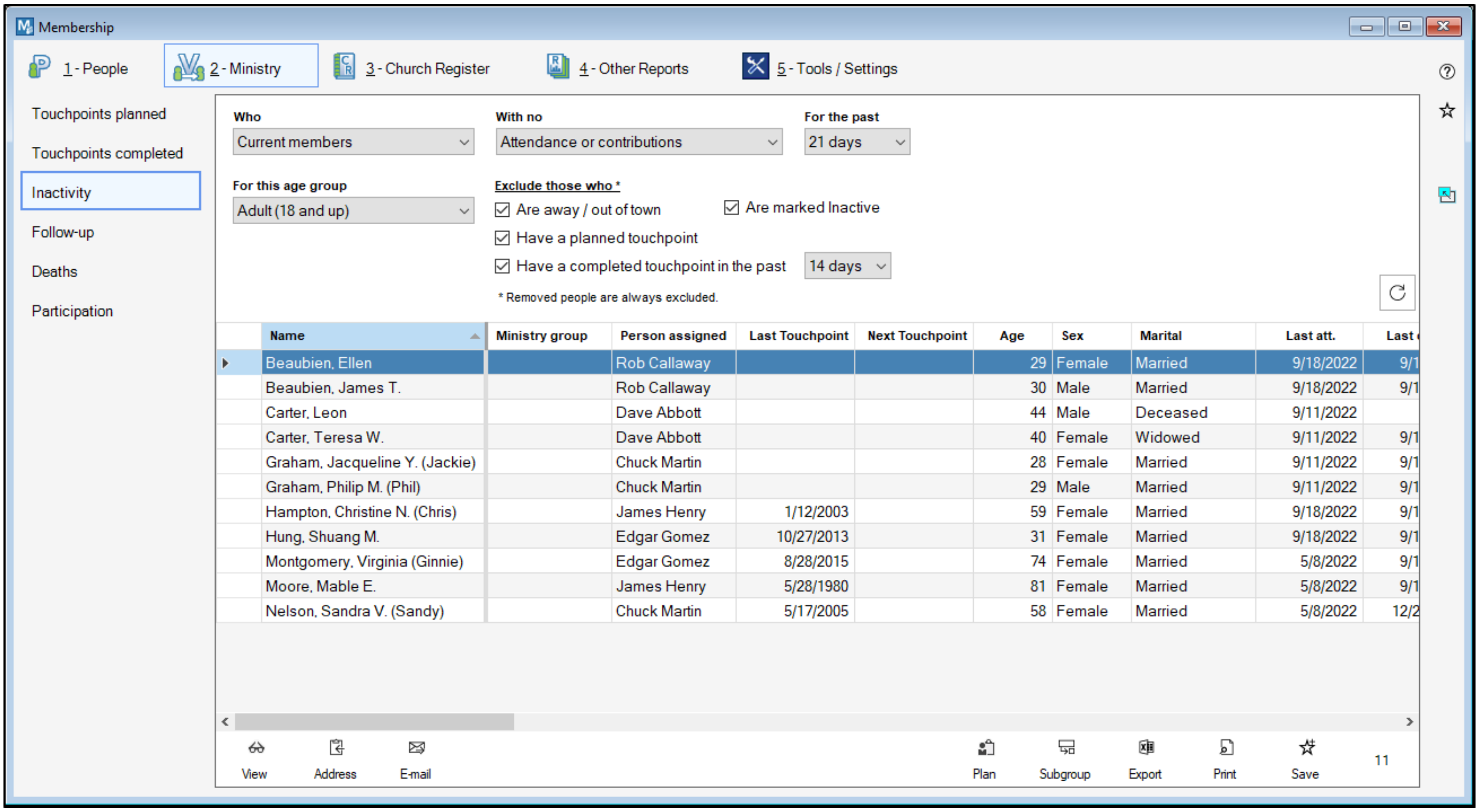
For the past - This field works in conjunction with the previous field. This looks at the previous field and allows you to see if they haven't participated within a certain number of days between 7 and 180 days.

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

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

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

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



# Follow-up

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

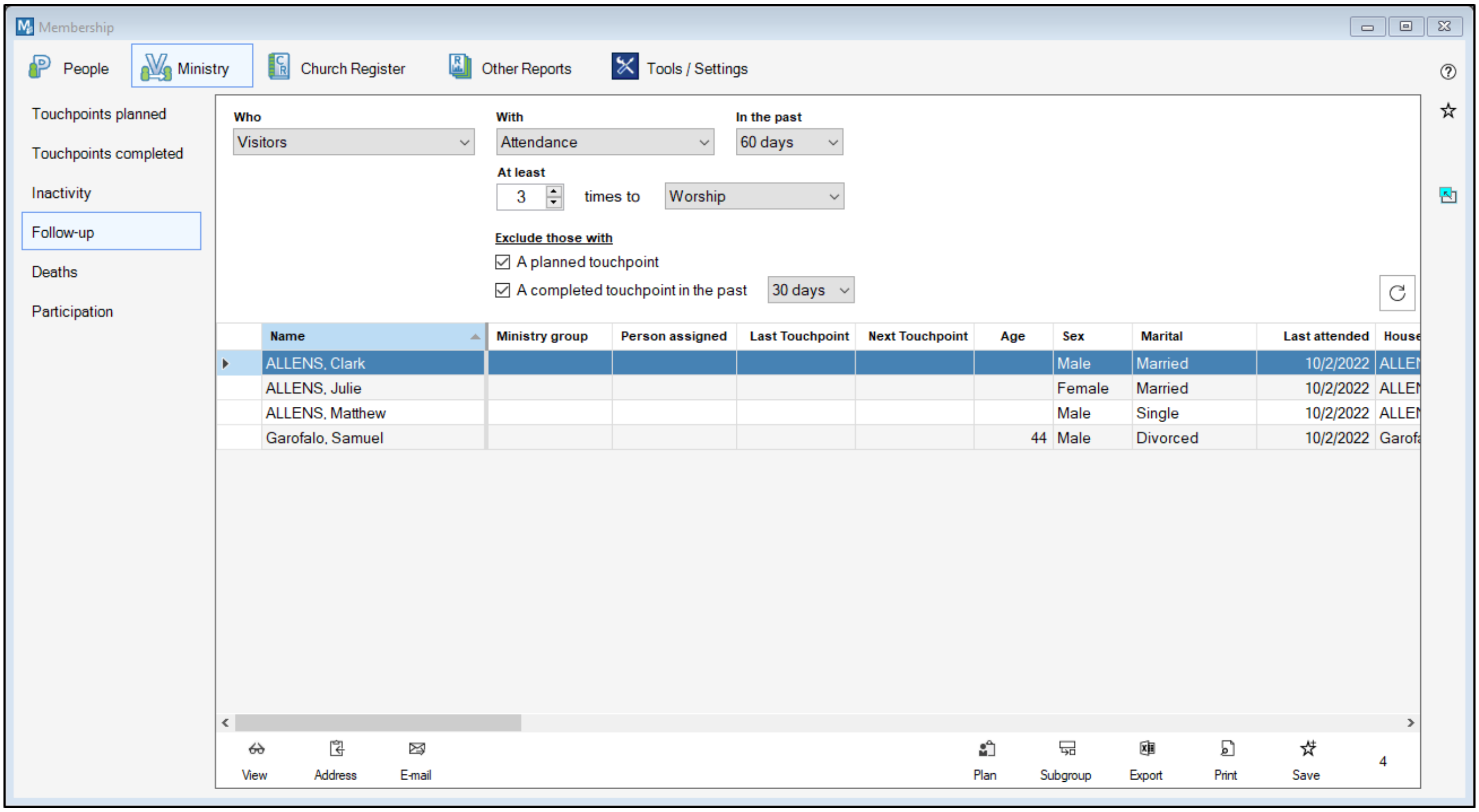
1. Access the Follow-up view by clicking on the Ministry Tab and choosing "Follow-up"
2. In the Follow-up view, select what filters you want to use to determine what people you need to follow up with. These filters include:

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

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

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

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




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

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

# Introduction to Church Register

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

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

The Church Register records:

» Weddings

» Funerals

» Baptisms

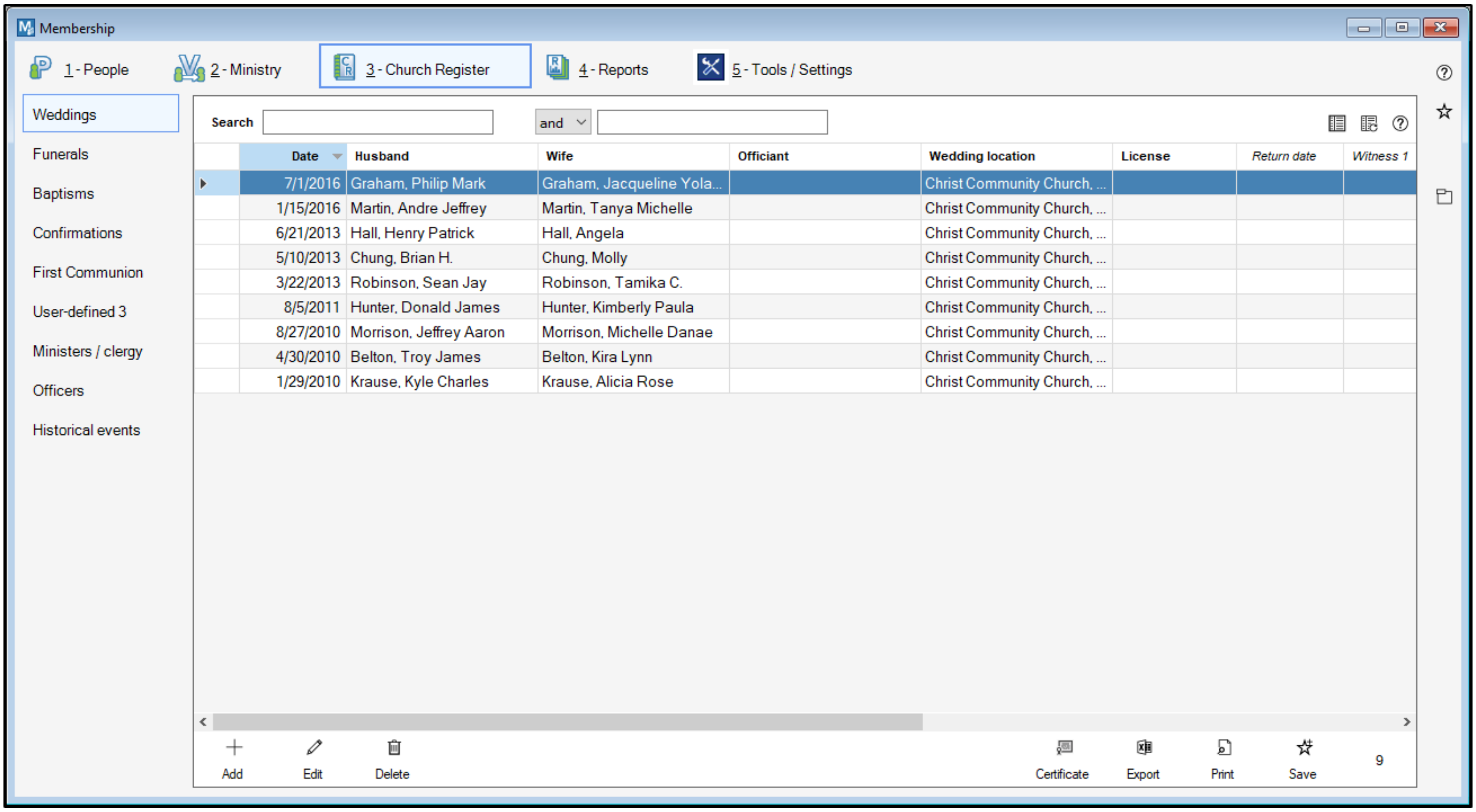
» Ministers / Clergy

» Officers

» Historical Events

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

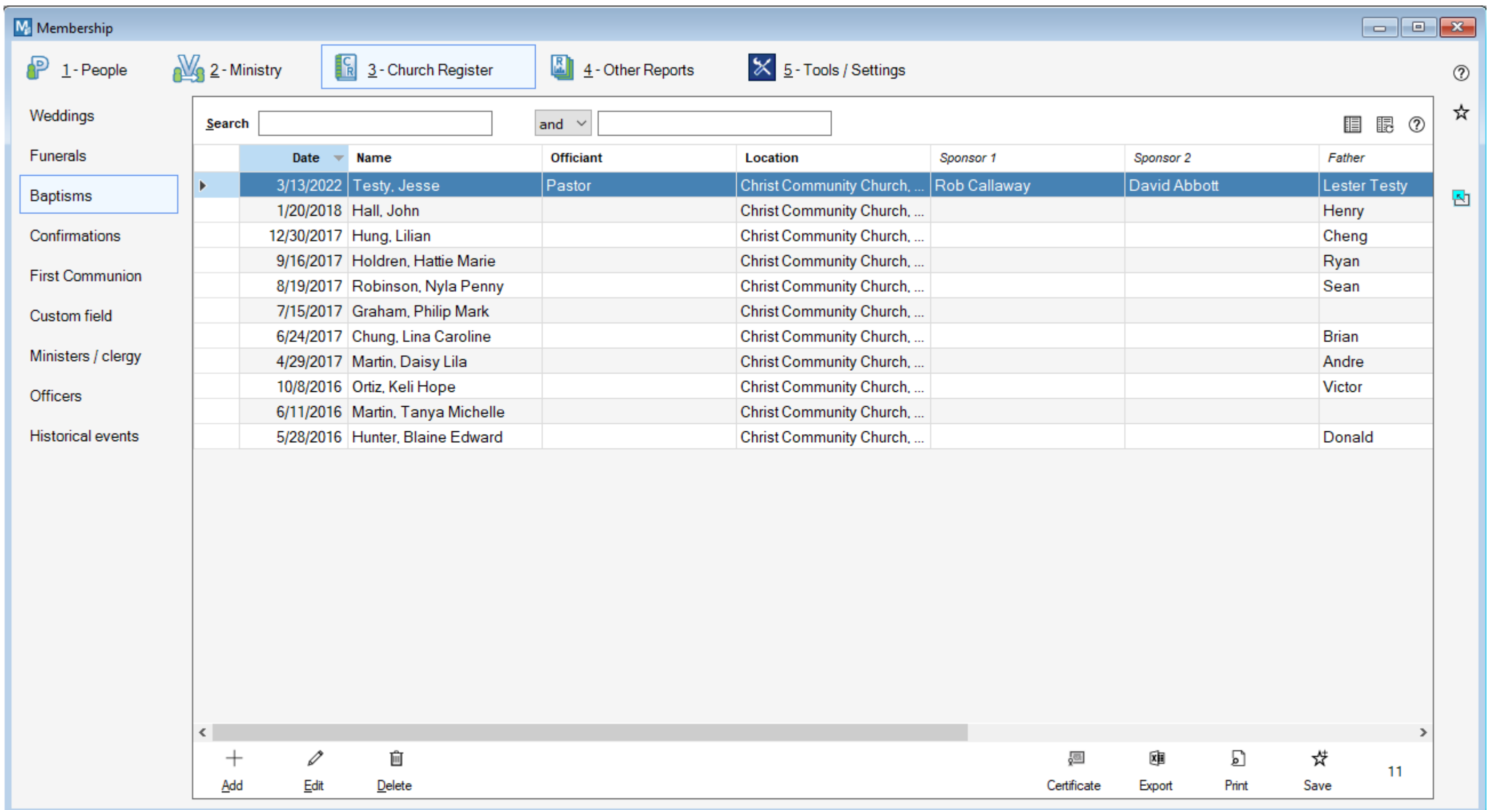
Note: The Church Register is a stand alone grid so none of the information entered will be automatically changed in the Person record and vice-versa. Moreover, the Register records are not affected by year end or the removal of a person.


Membership
1 - People
2 - Ministry
3 - Church Register
4 - Reports
5 - Tools / Settings
Weddings
Funerals
Baptisms
Confirmations
First Communion
User-defined 3
Ministers / clergy
Officers
Historical events
Search
and
Date
Husband
Wife
Officiant
Wedding location
License
Return date
Witness 1
7/1/2016 Graham, Philip Mark Graham, Jacqueline Yola... Christ Community Church, ...
1/15/2016 Martin, Andre Jeffrey Martin, Tanya Michelle Christ Community Church, ...
6/21/2013 Hall, Henry Patrick Hall, Angela Christ Community Church, ...
5/10/2013 Chung, Brian H. Chung, Molly Christ Community Church, ...
3/22/2013 Robinson, Sean Jay Robinson, Tamika C. Christ Community Church, ...
8/5/2011 Hunter, Donald James Hunter, Kimberly Paula Christ Community Church, ...
8/27/2010 Morrison, Jeffrey Aaron Morrison, Michelle Danae Christ Community Church, ...
4/30/2010 Belton, Troy James Belton, Kira Lynn Christ Community Church, ...
1/29/2010 Krause, Kyle Charles Krause, Alicia Rose Christ Community Church, ...
Add
Edit
Delete
Certificate
Export
Print
Save
9

# Baptisms

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

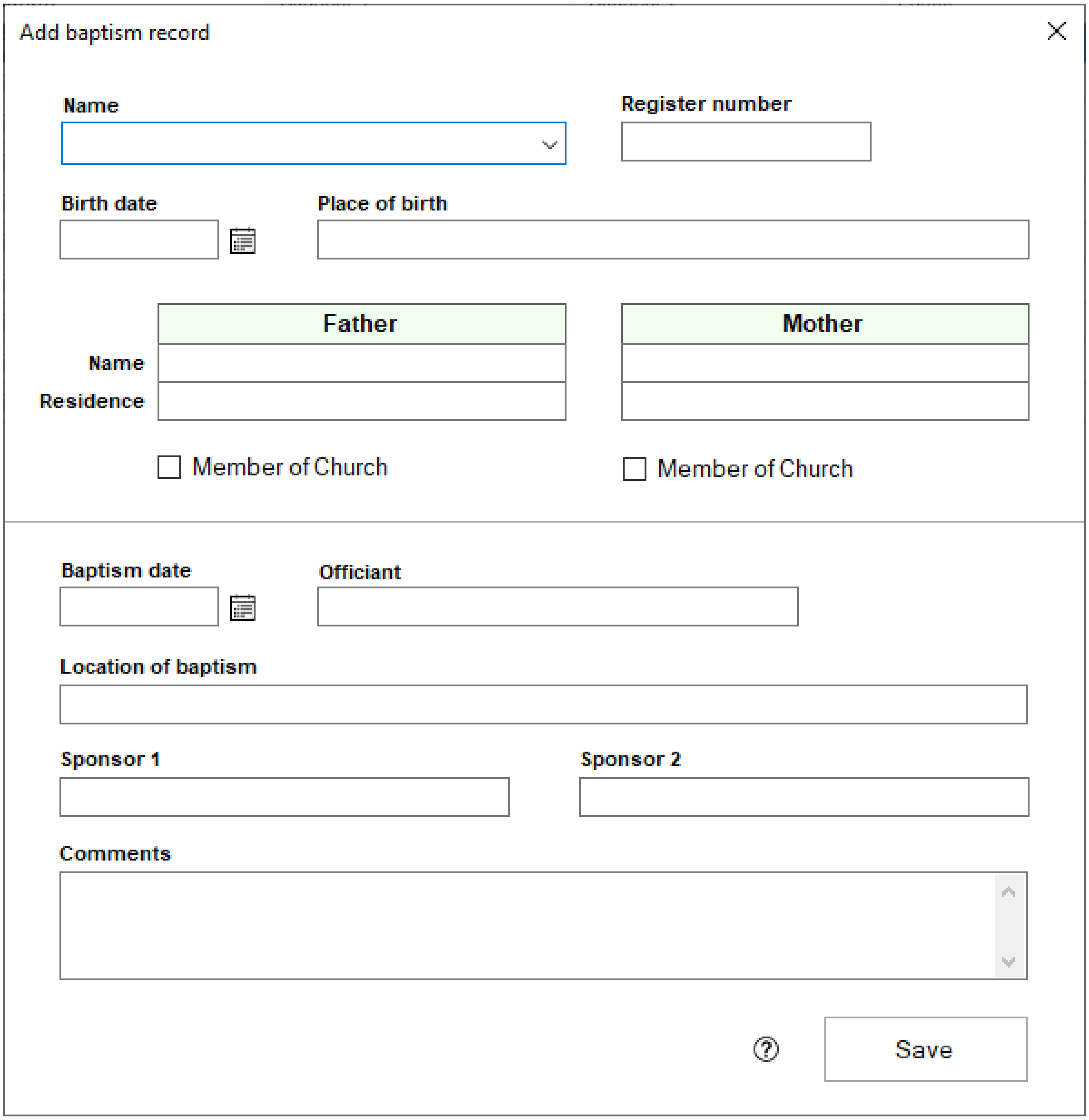
The Baptisms view can be searched by using the search bars at the top of the grid by using the standard search conventions.



# Add/Edit Baptism

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

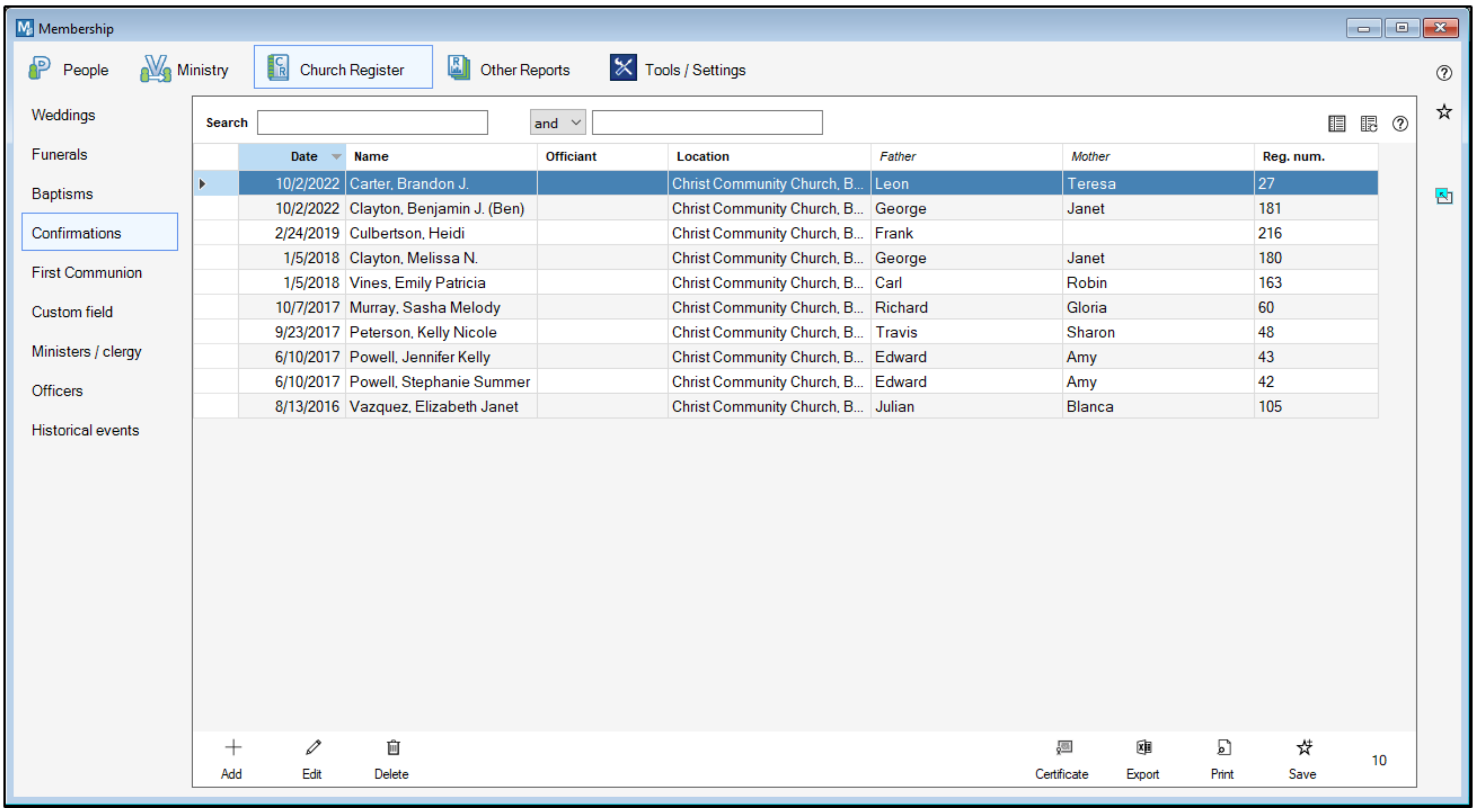
1. The first step is to make sure that the person you are entering a baptism for has been entered as a person. If this is not true, first add the person record for the person you are adding a baptism record for.
2. In the Church Register section of Membership, click on Baptisms and click "Add"
3. Select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


Add baptism record
Name
Register number
Birth date
Place of birth
Father
Mother
Name
Residence
Member of Church
Member of Church
Baptism date
Officiant
Location of baptism
Sponsor 1
Sponsor 2
Comments
Save

# Confirmations

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

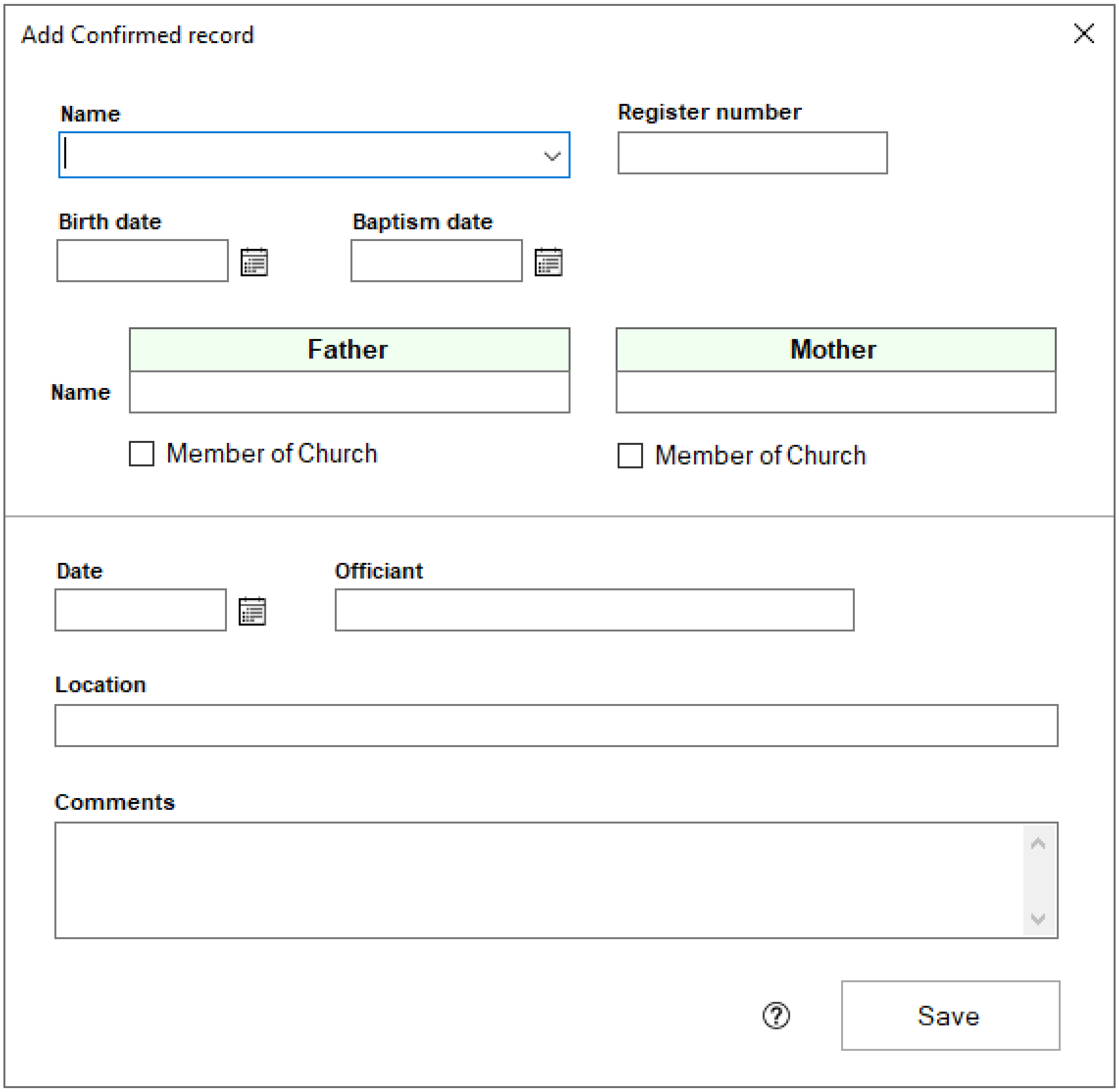
The Confirmations view can be searched by using the search bars at the top of the grid by using the standard search conventions.



# Add/Edit Confirmation

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

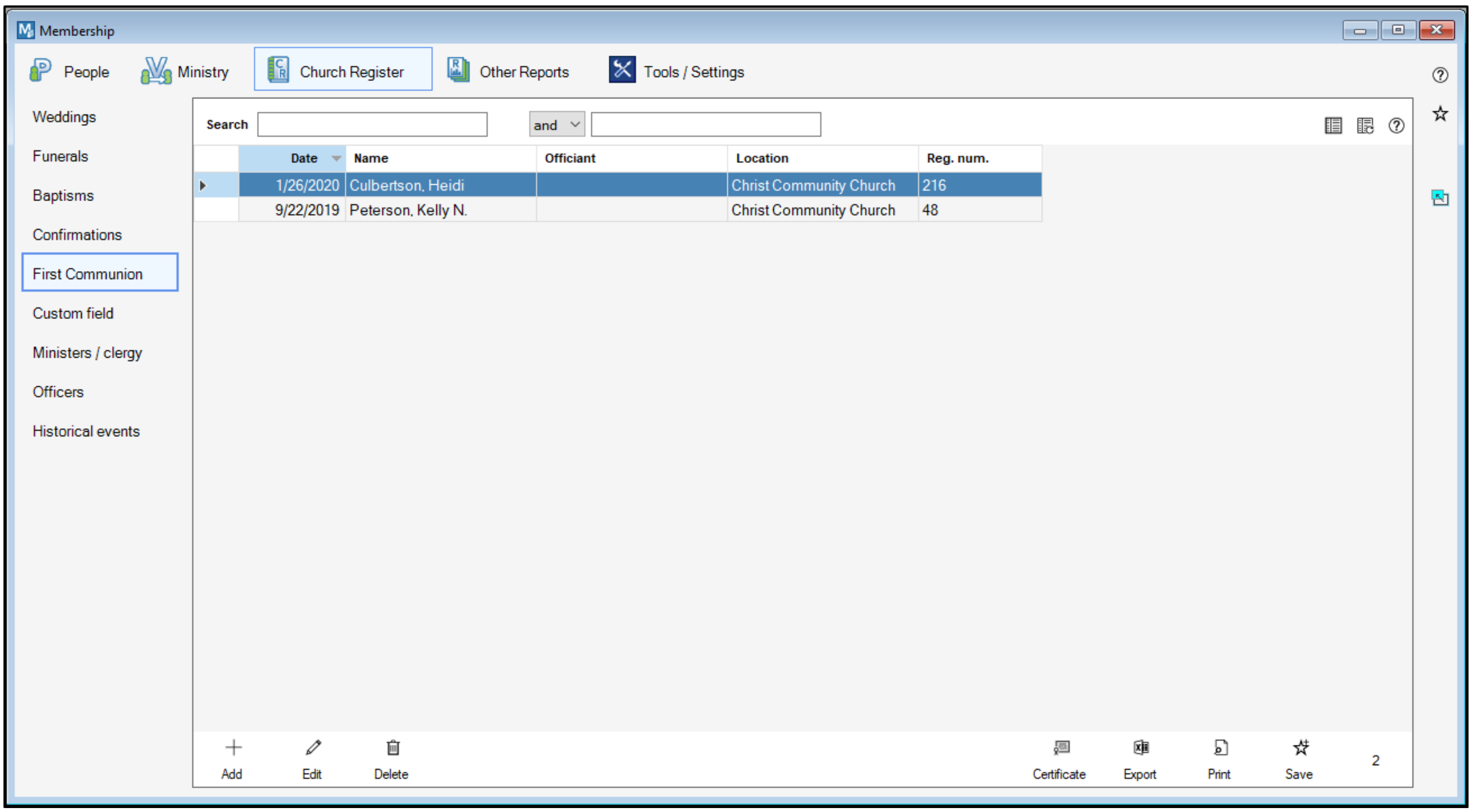
1. The first step is to make sure that the person you are entering a confirmation for has been entered as a person. If this is not true, first add the person record for the person you are adding a confirmation record for.
2. In the Church Register section of Membership, click on Confirmations and click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


Add Confirmed record
Name
Register number
Birth date
Baptism date
Father
Mother
Name
Member of Church
Member of Church
Date
Officiant
Location
Comments
Save

# First Communion

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

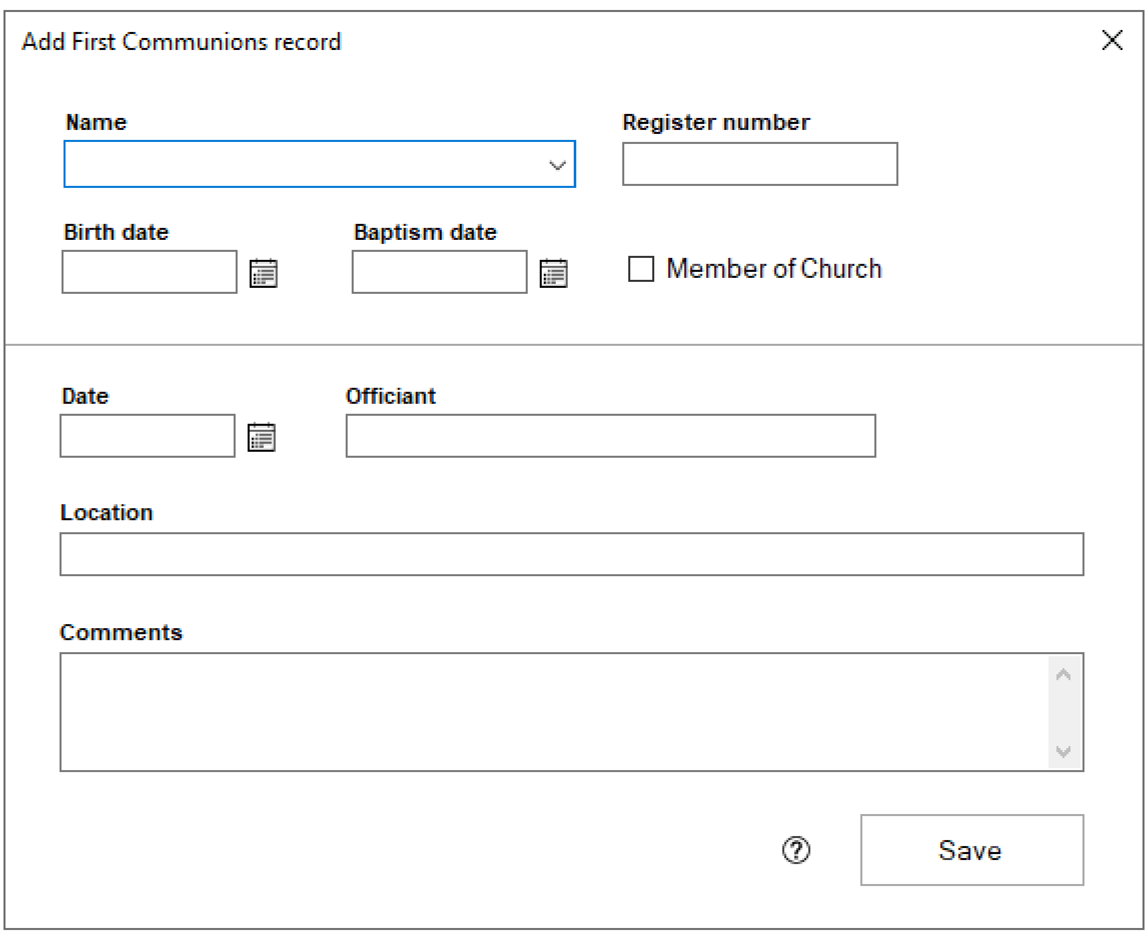
The First Communion view can be searched by using the search bars at the top of the grid by using the standard search conventions.



# Add/Edit First Communion

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

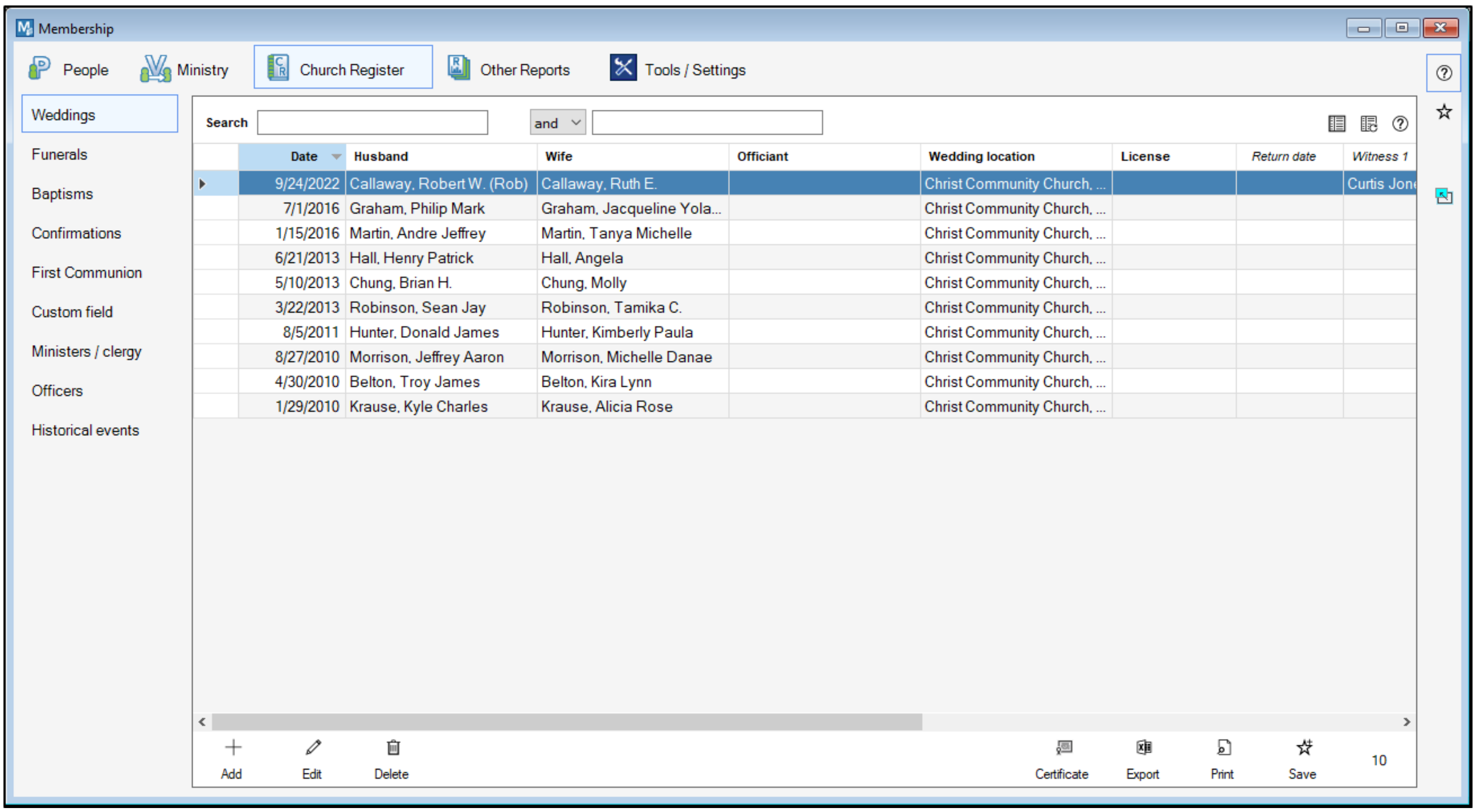
1. The first step is to make sure that the person you are entering a First Communion for has been entered as a person. If this is not true, first add the person record for the person you are adding a First Communion record for.
2. In the Church Register section of Membership, click on First Communion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



# Weddings

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

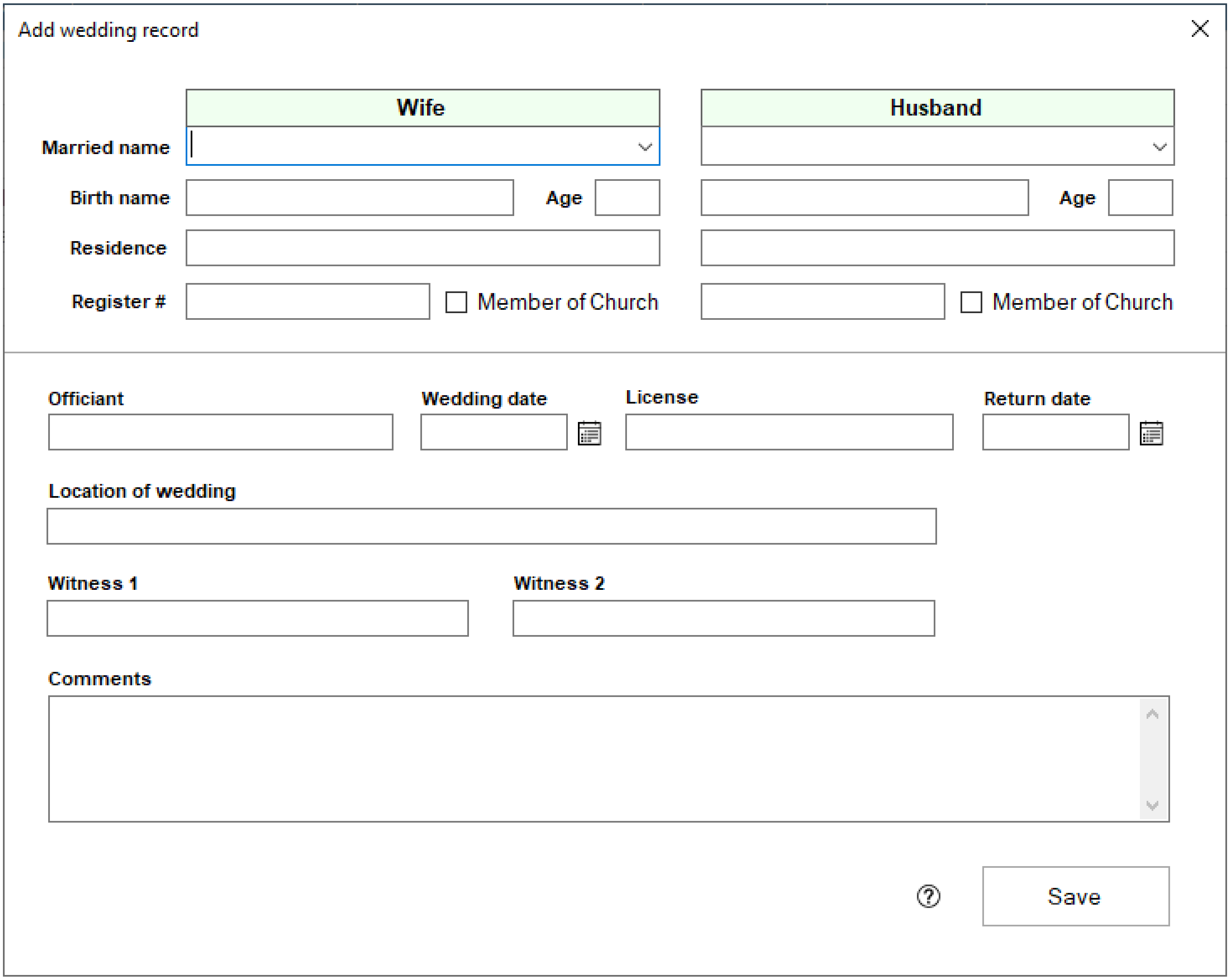
The weddings view can be searched by using the search bars at the top of the grid by using the standard search conventions.



# Add/Edit Weddings

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

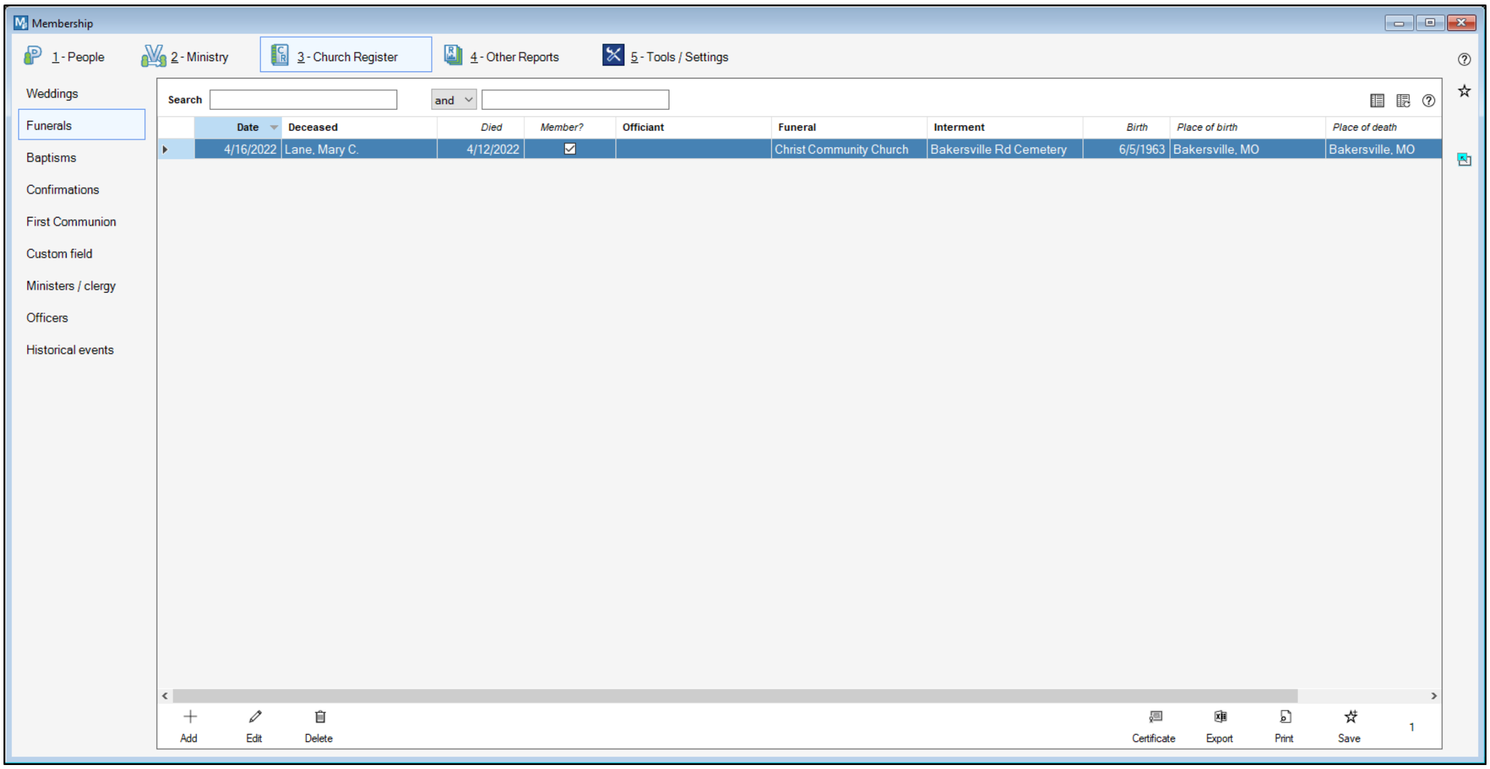
1. The first step is to make sure that both people who are to be married have been entered into Shepherd's Staff. If this is not true, first, go and add the person record(s) for the people you are adding.
2. In the Church Register section of Membership, click on Weddings and click "Add"
3. Select who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


Add wedding record
Wife
Husband
Married name
Birth name
Age
Age
Residence
Register #
Member of Church
Member of Church
Officiant
Wedding date
License
Return date
Location of wedding
Witness 1
Witness 2
Comments
Save

# Funerals

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

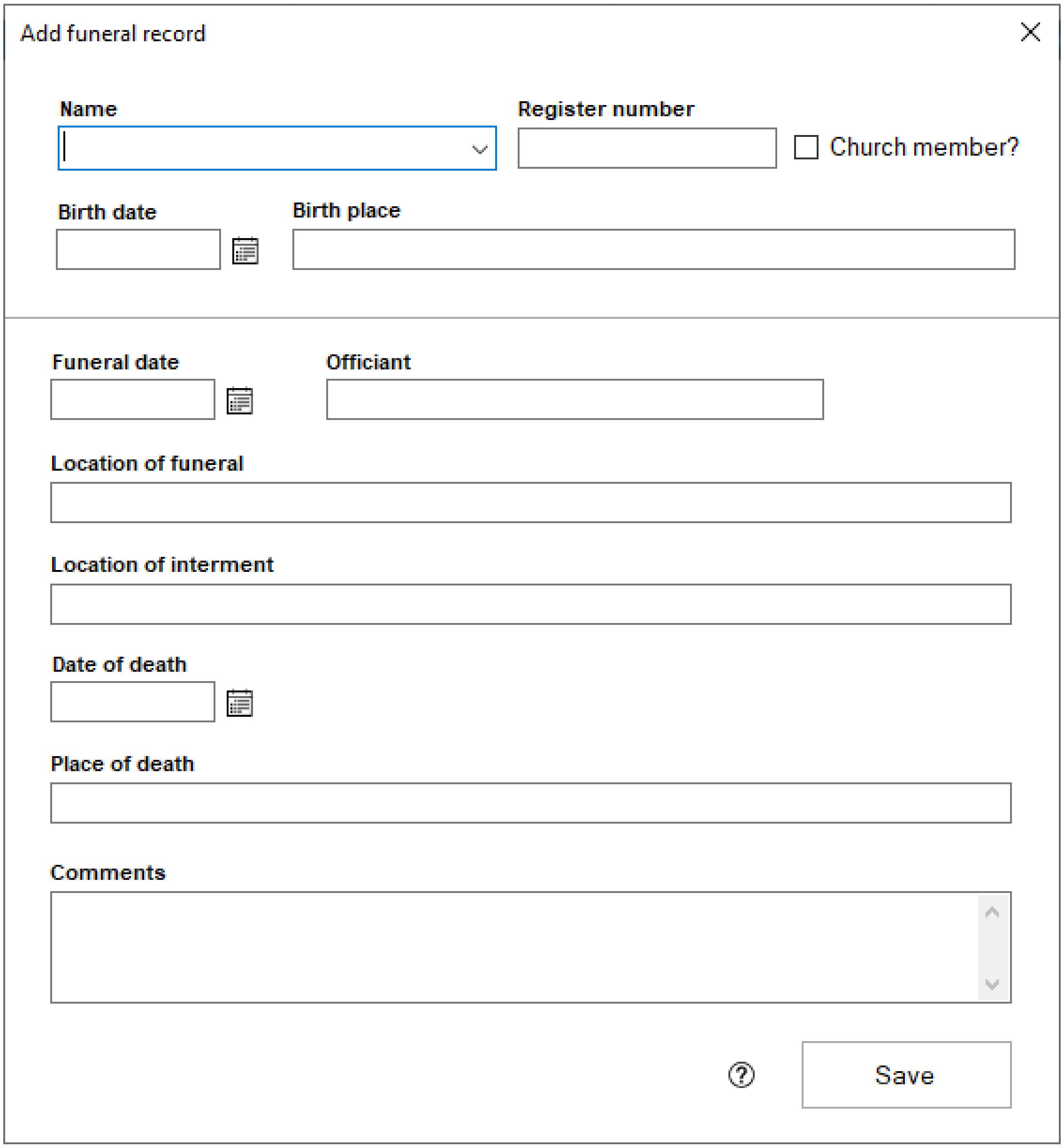
The Funerals view can be searched by using the search bars at the top of the grid by using the standard search conventions.



# Add/Edit Funeral

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

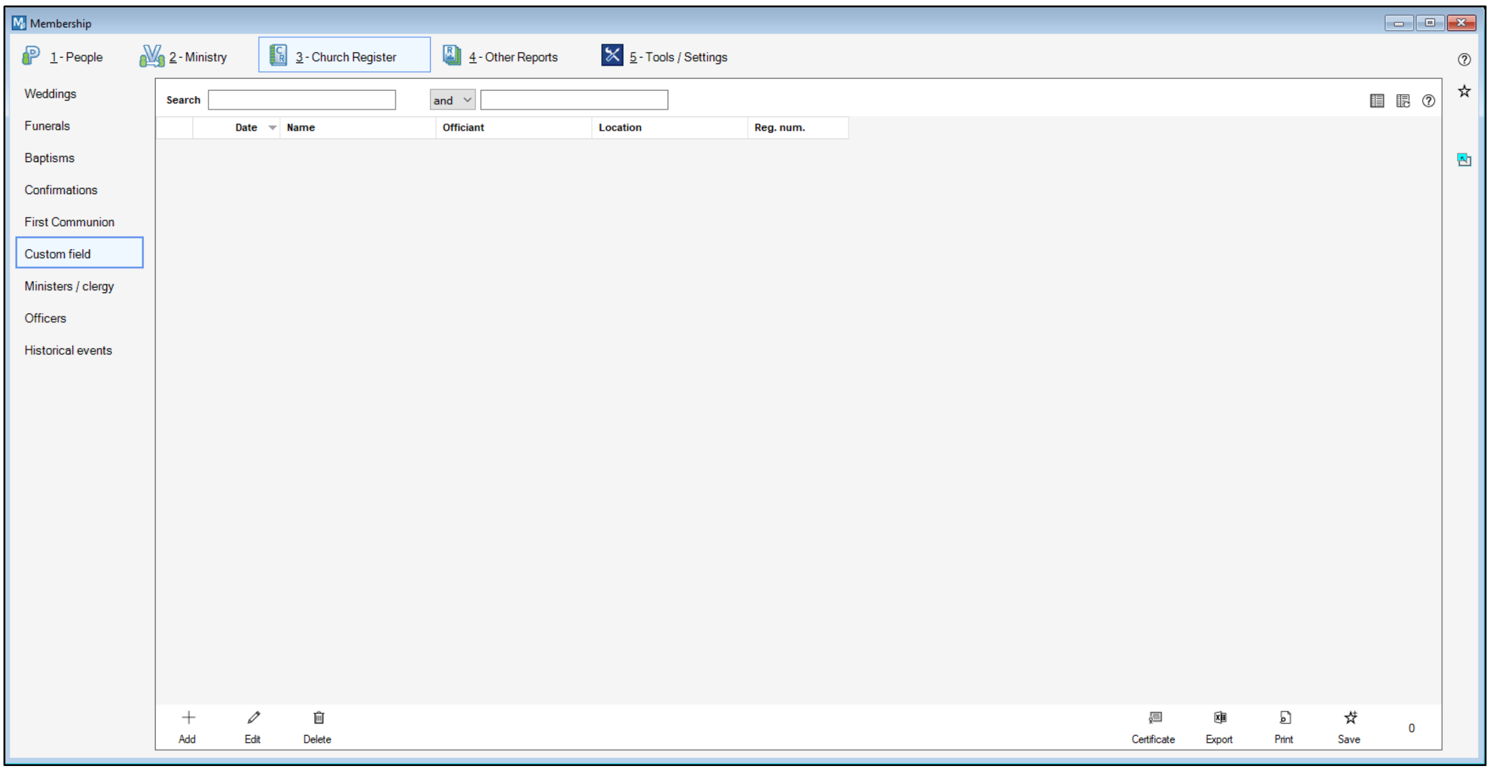
1. The first step is to make sure that the person you are entering the funeral for is listed in Shepherd's Staff. If this is not true, add the person record for the person you are entering the funeral for.
2. In the Church Register section of Membership, click on Funerals and click "Add"
3. Select the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


Add funeral record
Name
Register number
Church member?
Birth date
Birth place
Funeral date
Officiant
Location of funeral
Location of interment
Date of death
Place of death
Comments
Save

# Church Register Custom Field

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

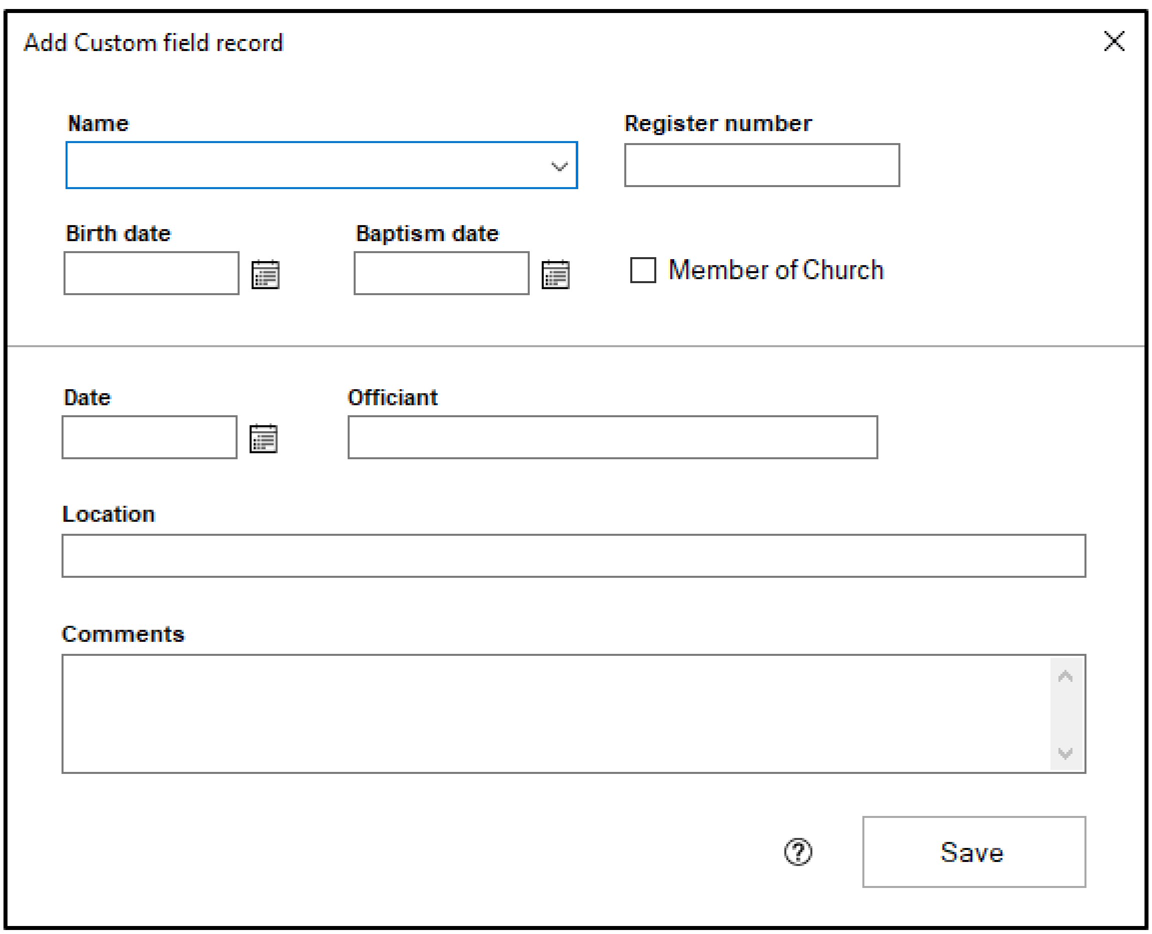
The Custom Field view can be searched by using the search bars at the top of the grid by using the standard search conventions. The name of the Custom Field view can be changed in the Customize field names section inside the Tools/Settings Menu.



# Add/Edit Church Register Custom Field

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

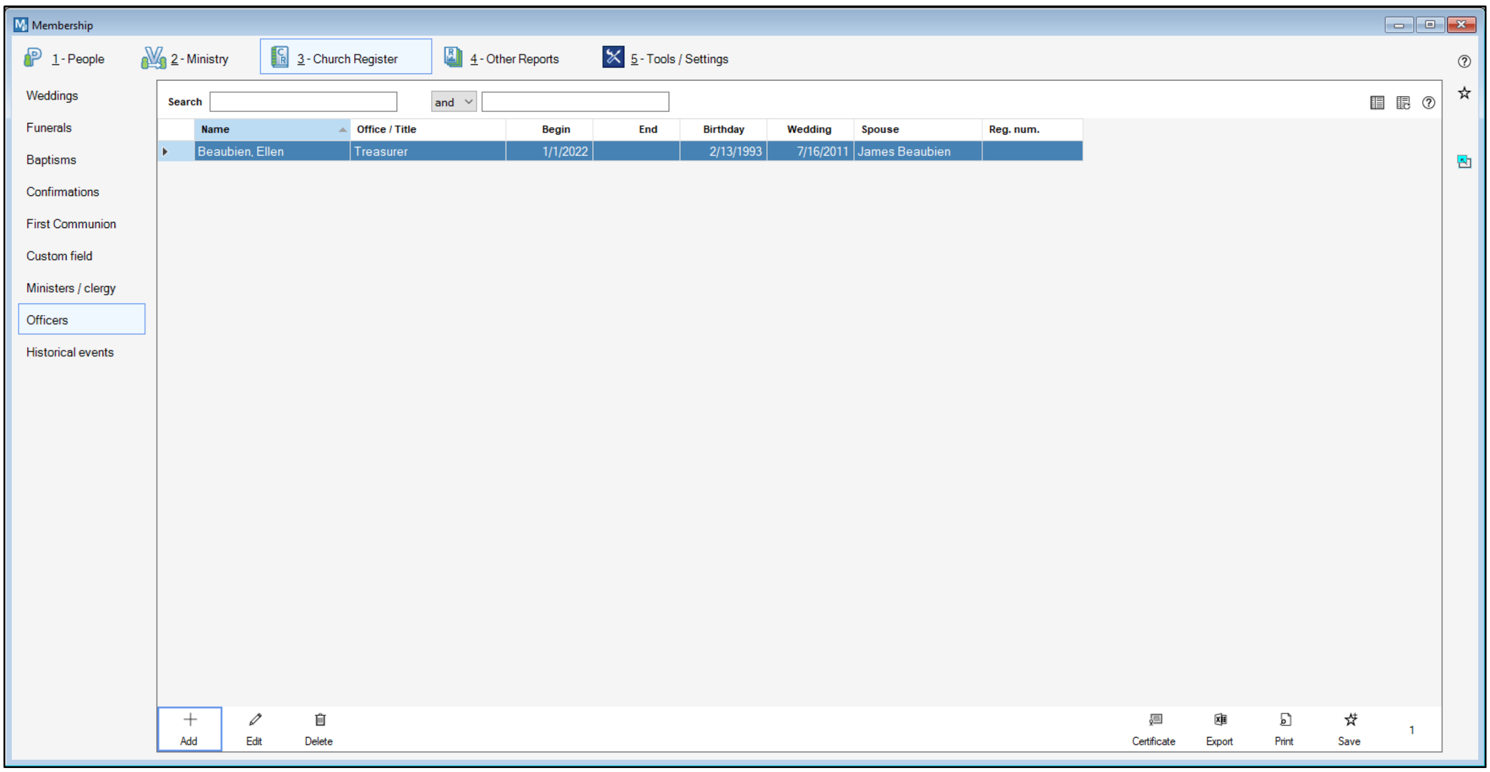
1. The first step is to make sure that the person you are entering an event for has been entered as a person. If this is not true, first add the person record for the person you are adding an event record for.
2. In the Church Register section of Membership, click on User-defined 3 and click "Add"
3.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



# Officers

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

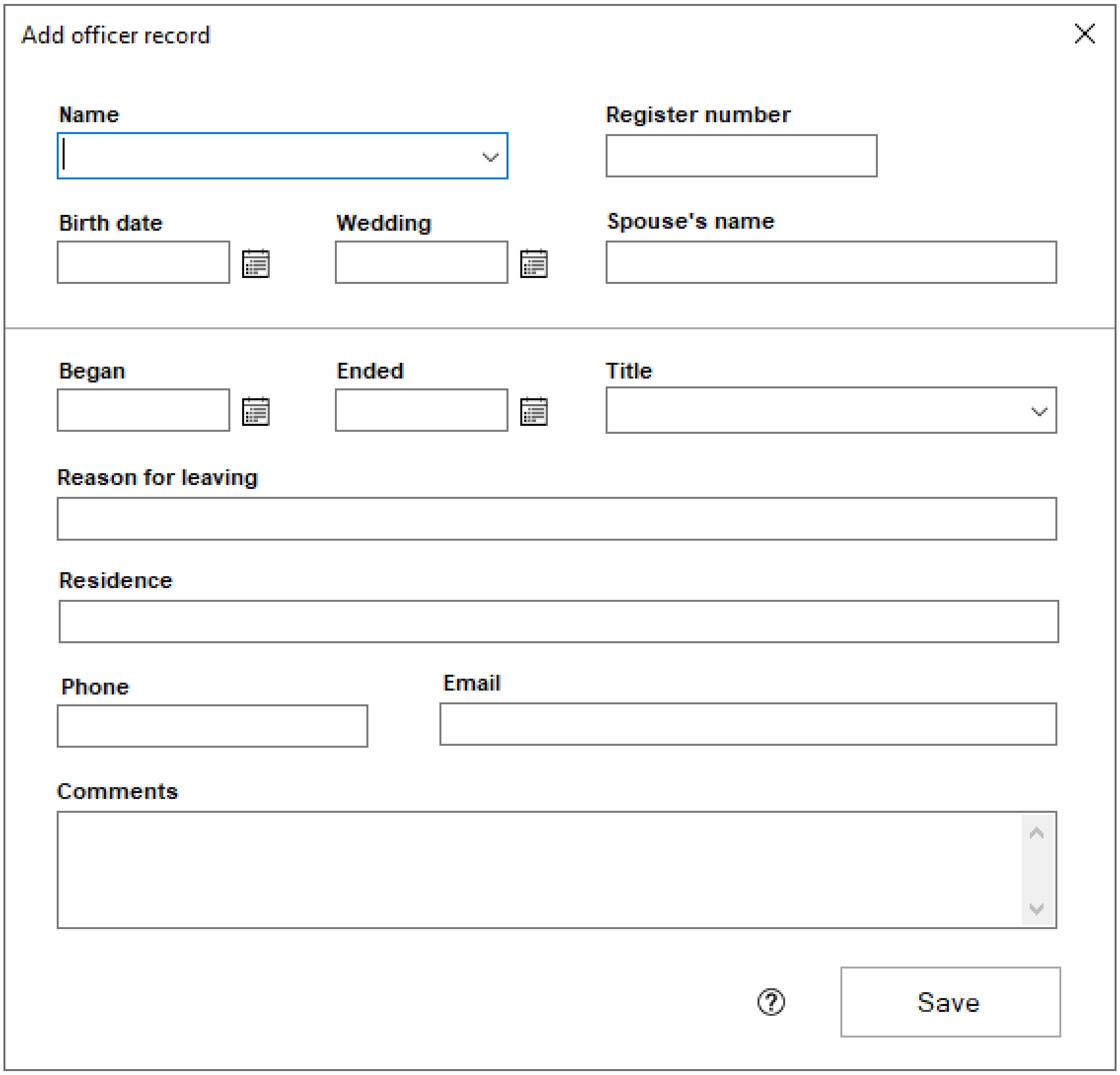
The Minister/Clergy view can be searched by using the search bars at the top of the grid by using the standard search conventions.



# Add/Edit Officers

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

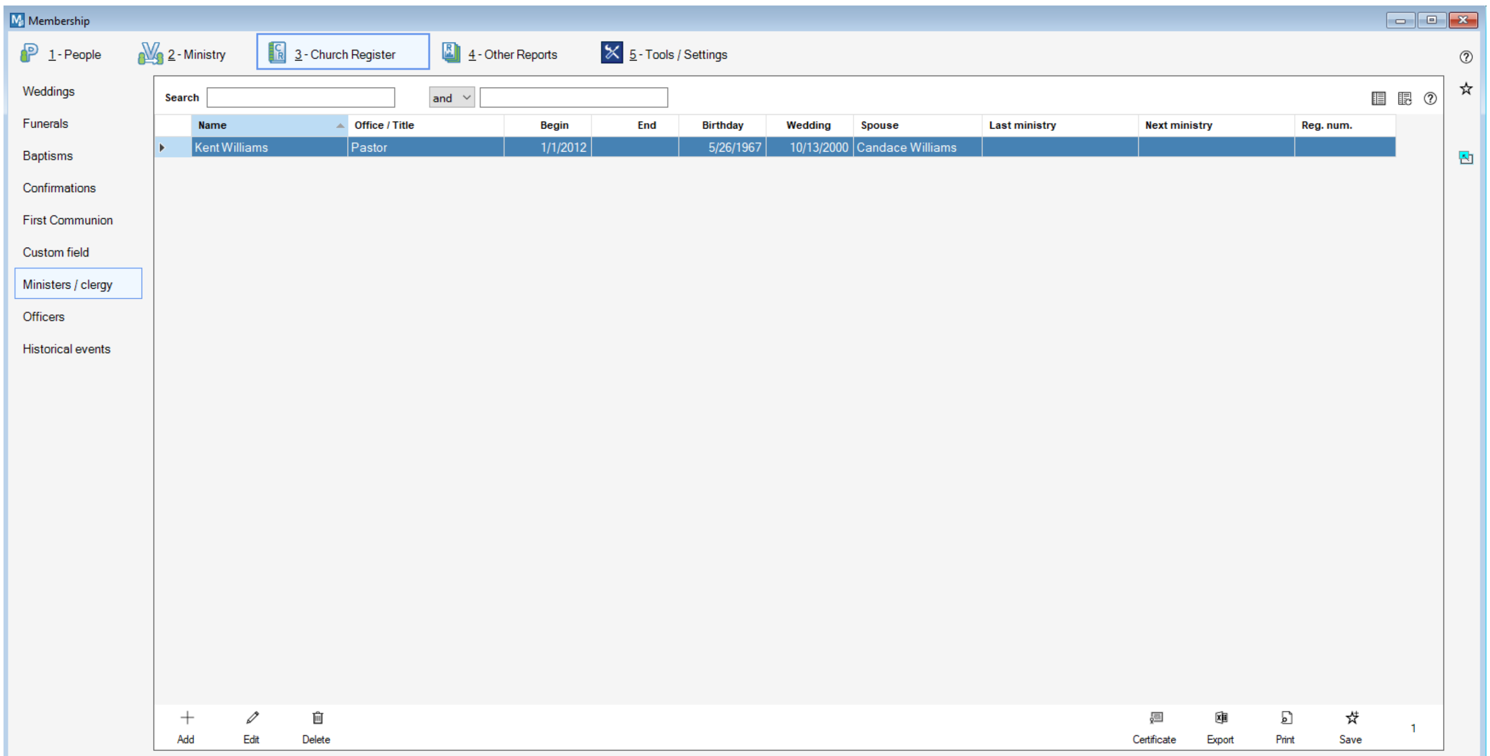
1. The first step is to make sure that the person you are entering into the Officers view has been entered as a person. If this is not true, first add the person record for the person you are adding an Officer record for.
2. In the Church Register section of Membership, click on Officers and click "Add"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


Add officer record
Name
Register number
Birth date
Wedding
Spouse's name
Began
Ended
Title
Reason for leaving
Residence
Phone
Email
Comments
Save

# Ministers/Clergy

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

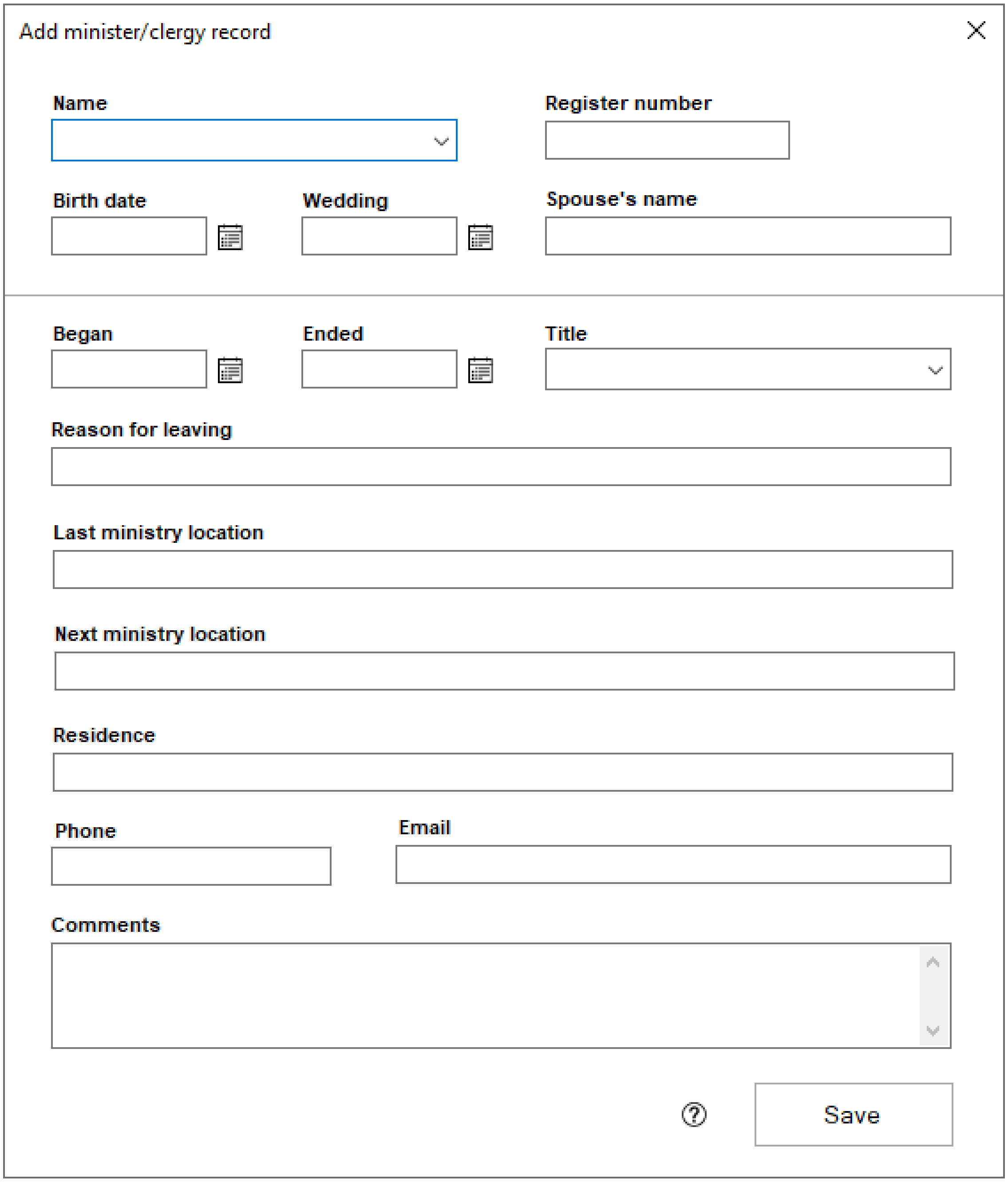
The Minister/Clergy view can be searched by using the search bars at the top of the grid by using the standard search conventions.



# Add/Edit Ministers/clergy

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

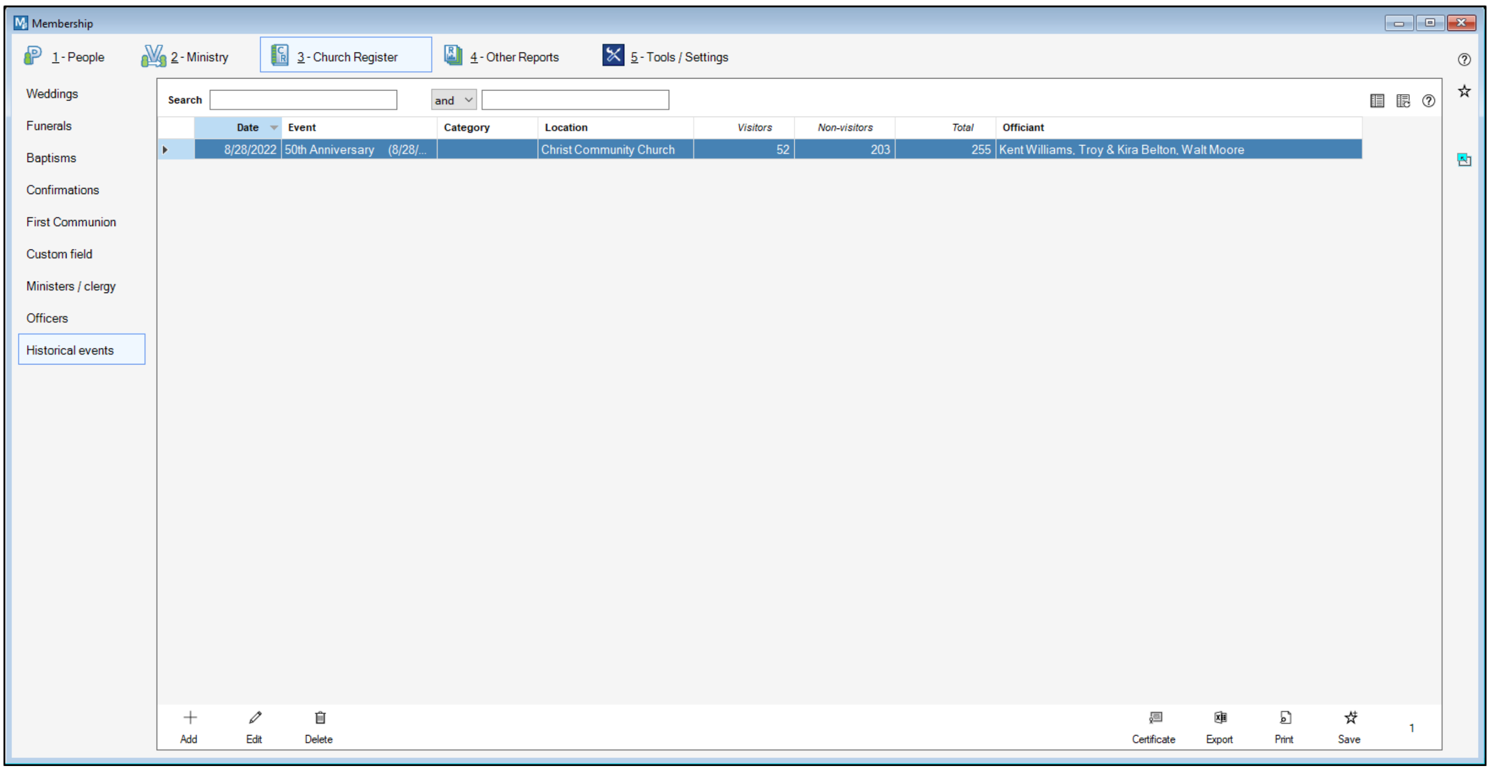
1. The first step is to make sure that the person you are entering into the Ministers/clergy view has been entered as a person. If this is not true, first add the person record for the person you are adding a Ministers/clergy record for.
2. In the Church Register section of Membership, click on Ministers/clergy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


Add minister/clergy record
Name
Register number
Birth date
Wedding
Spouse's name
Began
Ended
Title
Reason for leaving
Last ministry location
Next ministry location
Residence
Phone
Email
Comments
Save

# Historical Events

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

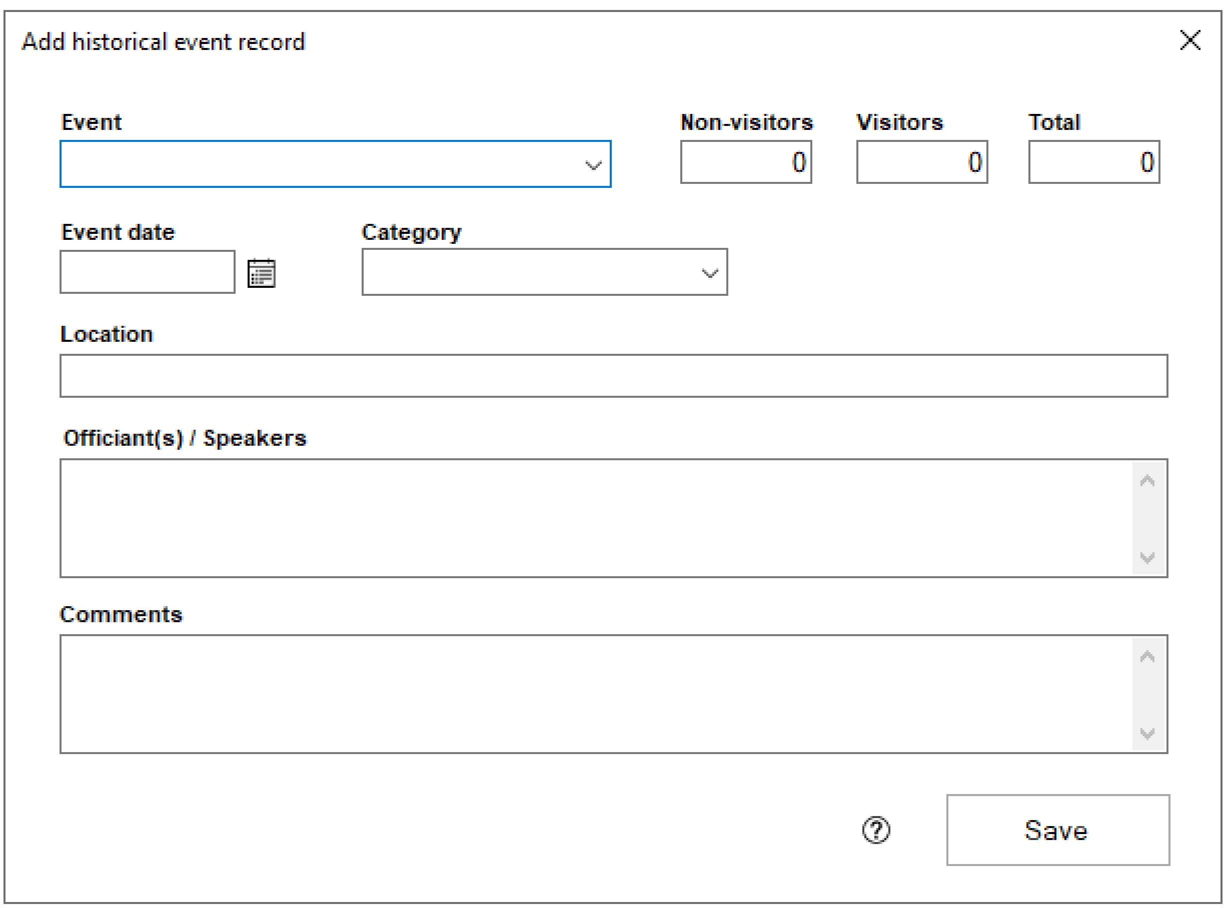
The Historical Events view can be searched by using the search bars at the top of the grid by using the standard search conventions.



# Add/Edit Historical Events

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

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



# Report Conventions

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

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

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

Note: Saved reports are exclusive to each user. A report saved under one user's login will not appear in the "My Reports" section for another user.

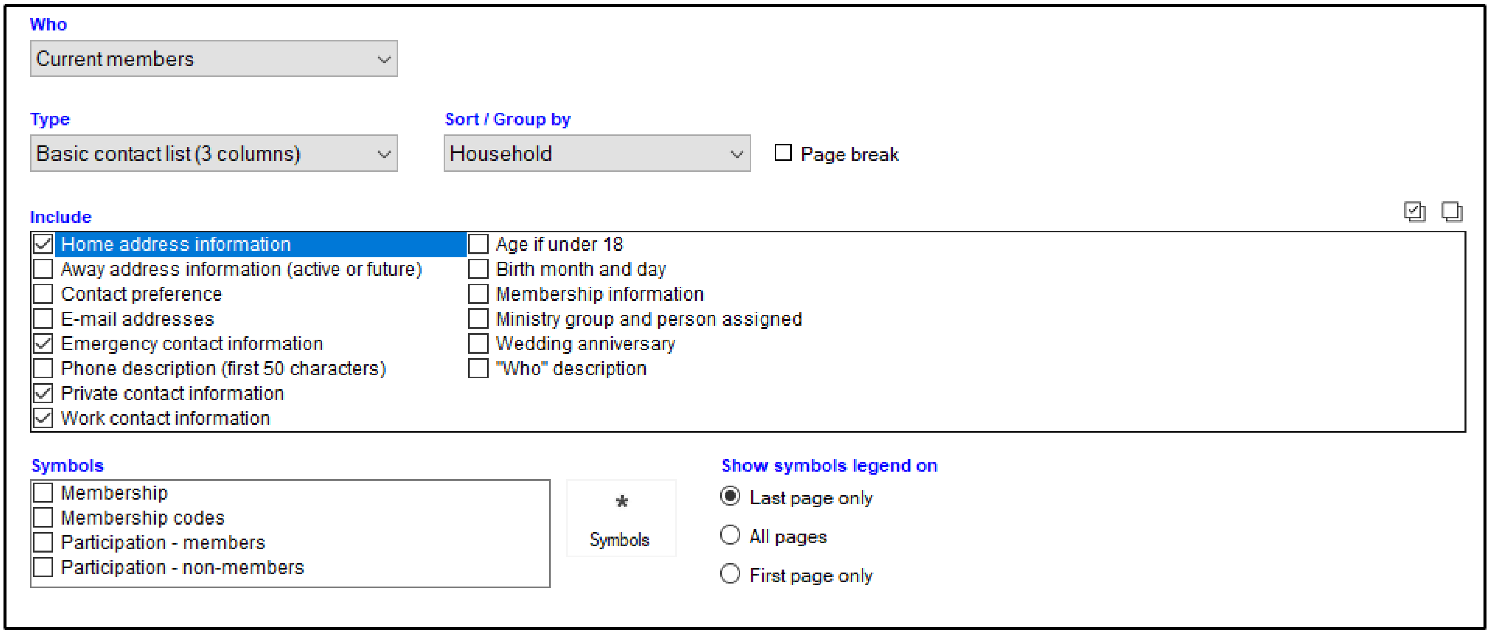
Another feature found in the majority of reports is the “Who” section. In the “Who” section you have the ability to tell this report what subset of records it should be run on. There are several options that will be available in most reports, including Everyone, Current Members (Listed as a member, participation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

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

Many reports also feature sections such as:

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

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



Who

Current members

Type

Basic contact list (3 columns)

Sort / Group by

Household

☐ Page break

Include

☑ Home address information
☐ Away address information (active or future)
☐ Contact preference
☐ E-mail addresses
☑ Emergency contact information
☐ Phone description (first 50 characters)
☑ Private contact information
☑ Work contact information
☐ Age if under 18
☐ Birth month and day
☐ Membership information
☐ Ministry group and person assigned
☐ Wedding anniversary
☐ "Who" description

Symbols

☐ Membership
☐ Membership codes
☐ Participation - members
☐ Participation - non-members

*
Symbols

Show symbols legend on

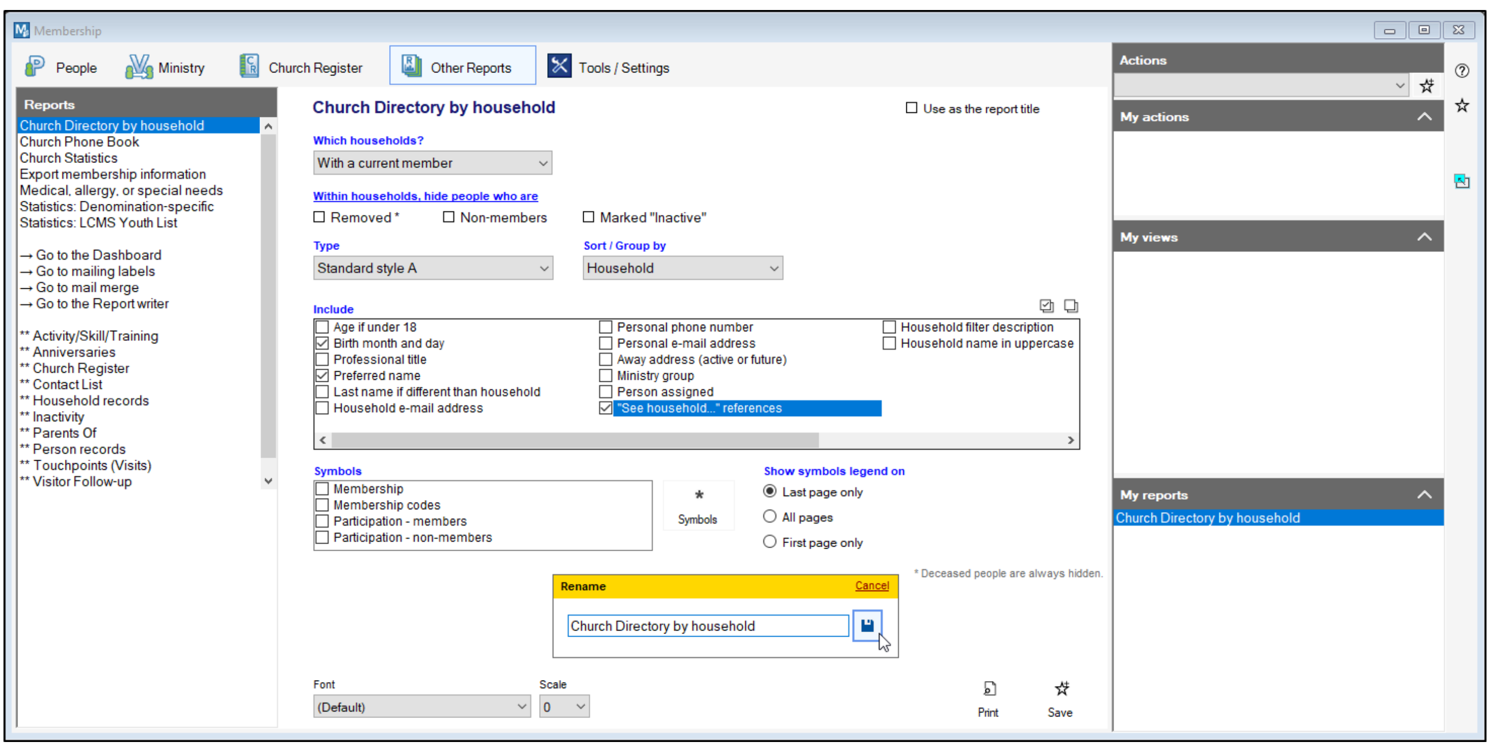
◉ Last page only
○ All pages
○ First page only

# Saving Reports

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

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

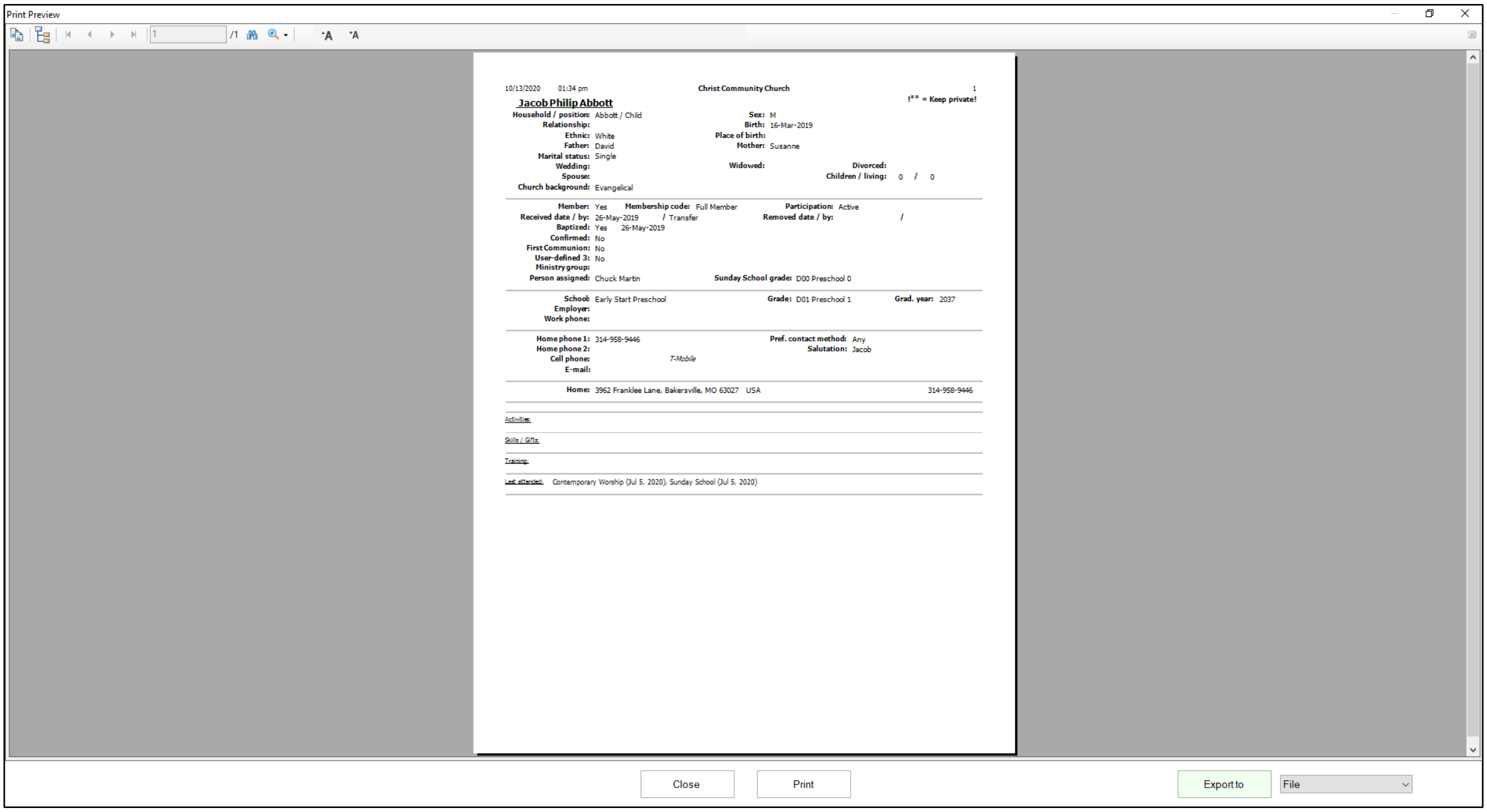
To access a saved report, simply double-click on it from any window. This will take you to that report, as it was saved. If you would like to rename the report, right click on the report, and click rename. If you want to delete the saved report, right click on it and click delete. You can also change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



# Report Preview

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

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




10/13/2020 01:34 pm Christ Community Church 1

!** = Keep private!

**Jacob Philip Abbott**

**Household / position:** Abbott / Child **Sex:** M
**Relationship:** **Birth:** 16-Mar-2019
**Ethnic:** White **Place of birth:**
**Father:** David **Mother:** Susanne
**Marital status:** Single
**Wedding:** **Widowed:** **Divorced:**
**Spouse:** **Children / living:** 0 / 0
**Church background:** Evangelical

**Member:** Yes **Membership code:** Full Member **Participation:** Active
**Received date / by:** 26-May-2019 / Transfer **Removed date / by:** /
**Baptized:** Yes 26-May-2019
**Confirmed:** No
**First Communion:** No
**User-defined 3:** No
**Ministry group:**
**Person assigned:** Chuck Martin **Sunday School grade:** D00 Preschool 0

**School:** Early Start Preschool **Grade:** D01 Preschool 1 **Grad. year:** 2037
**Employer:**
**Work phone:**

**Home phone 1:** 314-958-9446 **Pref. contact method:** Any
**Home phone 2:** **Salutation:** Jacob
**Cell phone:** *T-Mobile*
**E-mail:**

**Home:** 3962 Franklee Lane, Bakersville, MO 63027 USA 314-958-9446

Activities:

Skills / Gifts:

Training:

Last attended: Contemporary Worship (Jul 5, 2020), Sunday School (Jul 5, 2020)

# Mailing Labels

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


- Mailing Labels
- Mailing Label Report
- Information Labels


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

# Mailing Labels

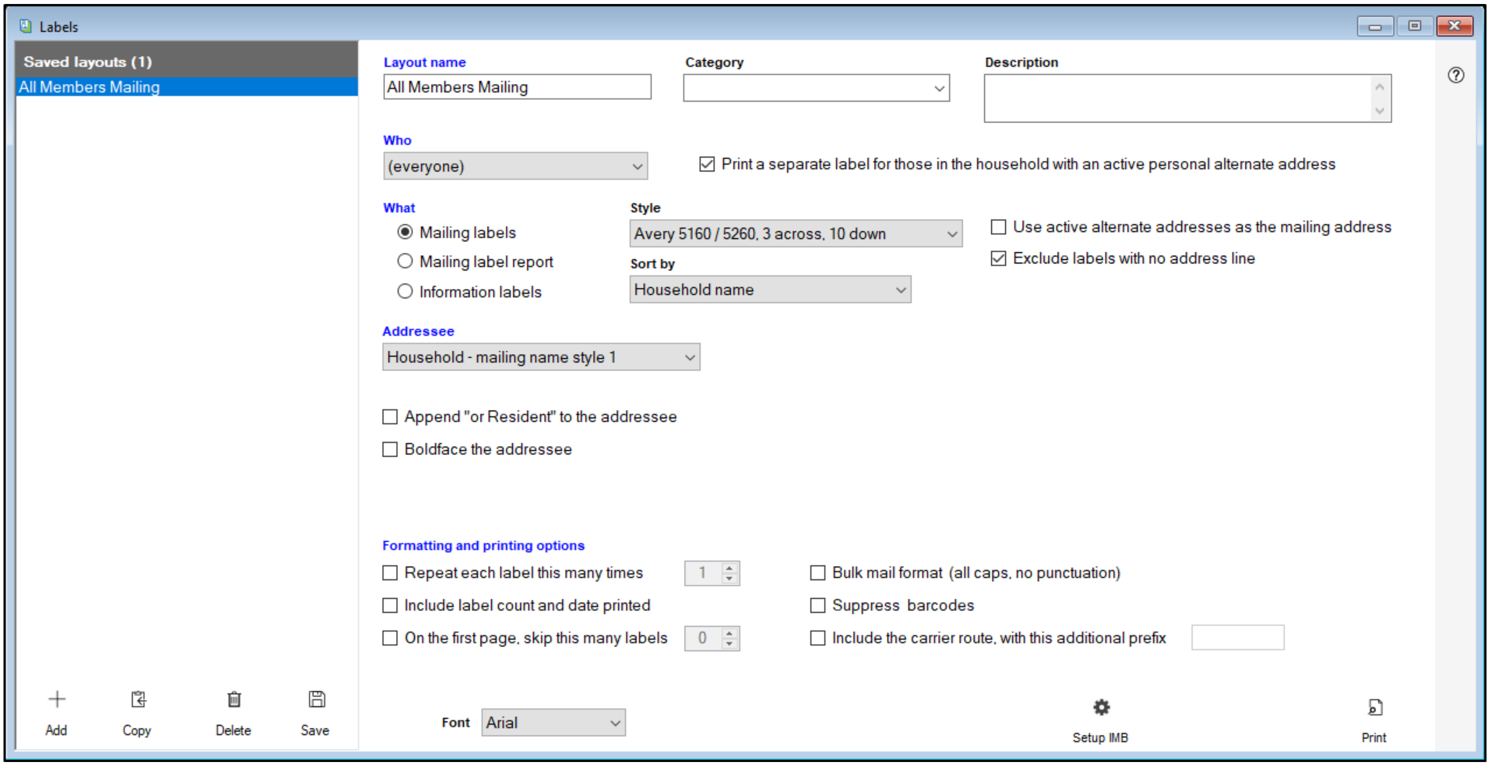
1. Select "Mailing Labels" in the "What" section, and then, select from the following options:
   - Style—This determines the size of your labels. We offer options for 6 of the most popular style of Avery mailing labels, as well as the ability to print directly onto Size #9 or Size#10 envelopes.
   - Sort By —This option determines what order your labels will print out in. You have the option of printing out sorted by name, zip code, then name, zip code+carrier route+4 digit extension, or Carrier

Route, then Zip Code

- Addressee—This determines how the labels are formatted. There are both Household and Person options. Any Household option will print out one address label per household, and any person option will print out one label per person. There are also checkboxes to append "or Current Resident" to the addressee line of your label as well as to make the Addressee line bold by checking the "Boldface the addressee" box.

2. Next, select from formatting and printing options for your labels. These options include:
   - Repeat each label this many times — If checked, this checkbox will produce copies for each label for the number you selected.
   - Include label count and date printed—If checked, this checkbox will create an additional label after the last label that shows how many labels you printed, and when you generated these labels
   - On the first page, skip this many labels —If checked, this checkbox will leave labels blank for the number of labels you selected.
   - Bulk mail format (all caps, no punctuation) —If checked, this checkbox will print your labels with all capital letters, and will not include any punctuation.
   - Suppress barcodes—If checked, this checkbox will remove the barcodes from the labels you produce.
   - Include the carrier route, with this additional prefix —If checked, this will allow you to include the carrier route on the label with an additional prefix that you type in on your labels.
3. Before you print your labels, you can pick which font you'd like to use (either Arial or Courier New).
4. After choosing the settings you want, click Print to preview your labels.

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

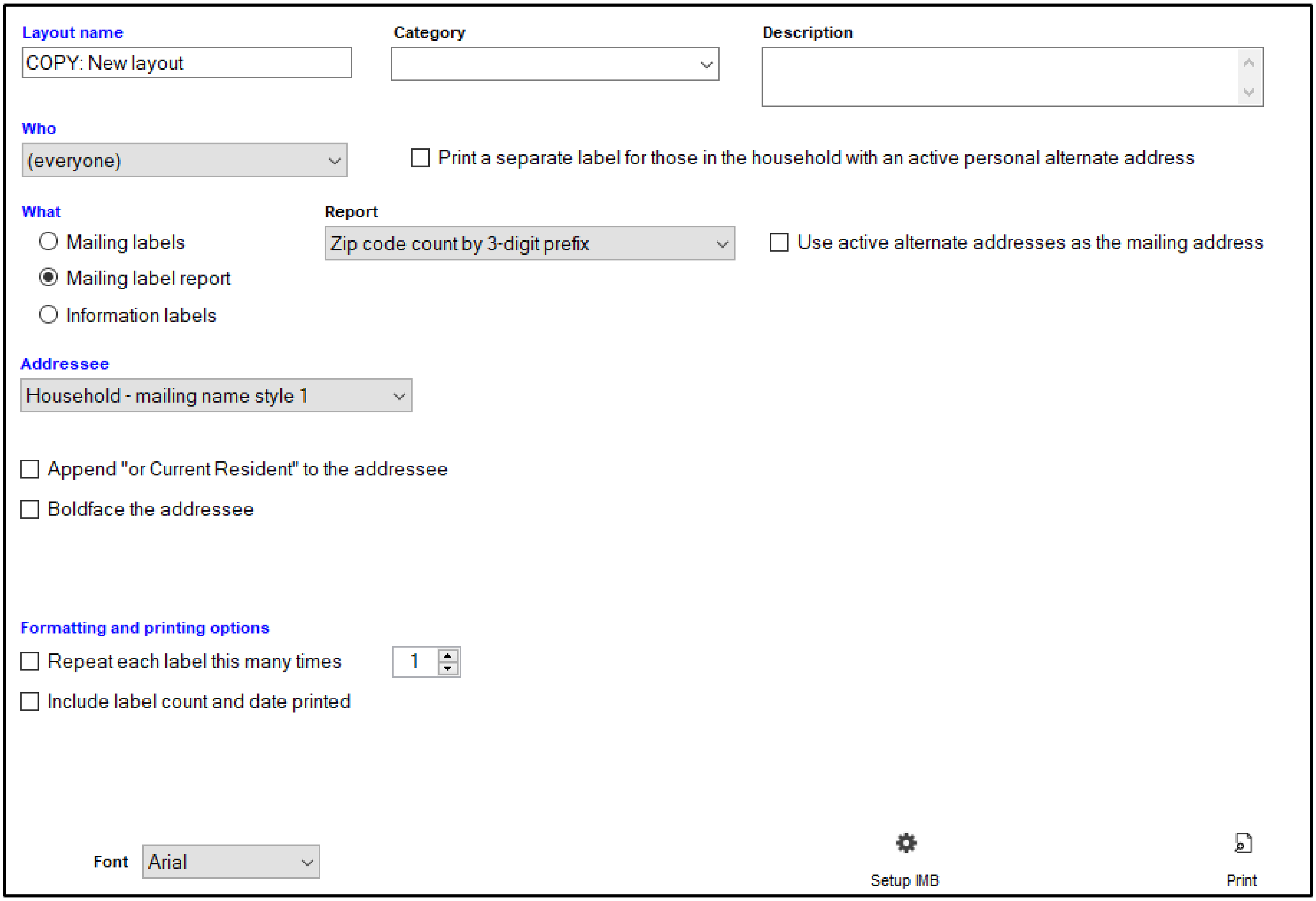



# Mailing Label Report

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

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

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




## Information Labels

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

1. Select "Information labels" in the What section, and select from the following options
   - Style—This determines the size of your labels. We offer options for 6 of the most popular style of Avery mailing labels, as well as the ability to print directly onto Size #9 or Size#10 envelopes.
   - Sort By —This option determines the order in which your labels print out. There are options to sort by different configurations of the lines you select in the Information section.
   - Information —These fields allow you to select how you want your label to be laid out. The lines on your labels will be laid out from top to bottom, from Line 1 to Line 6. Each line contains the same set of options that you can place on that line. There are options for names, addresses, phone numbers,

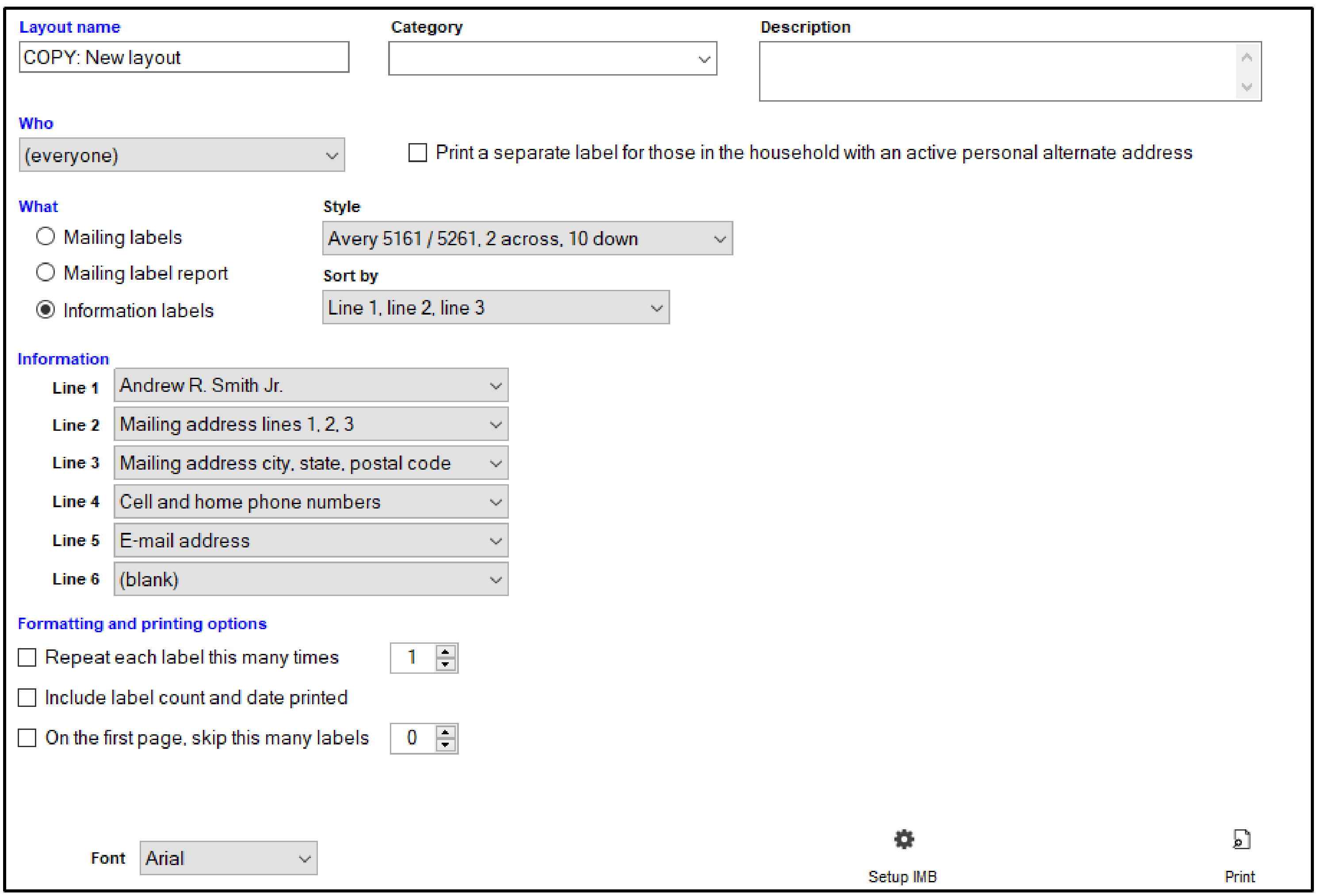
birthday, and membership information. There is also an option for (user supplied text) where, if selected will let you type in what you want to appear on that line for every label you print.

2. Next, select the formatting and printing options for your labels. These options include:

- Repeat each label this many times — If checked, this checkbox will produce copies for each label for the number you selected.
- Include label count and date printed—If checked, this checkbox will create an additional label after the last label that shows how many labels you printed, and when you generated these labels
- On the first page, skip this many labels—If checked, this checkbox will leave labels blank for the number of labels you selected.

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

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

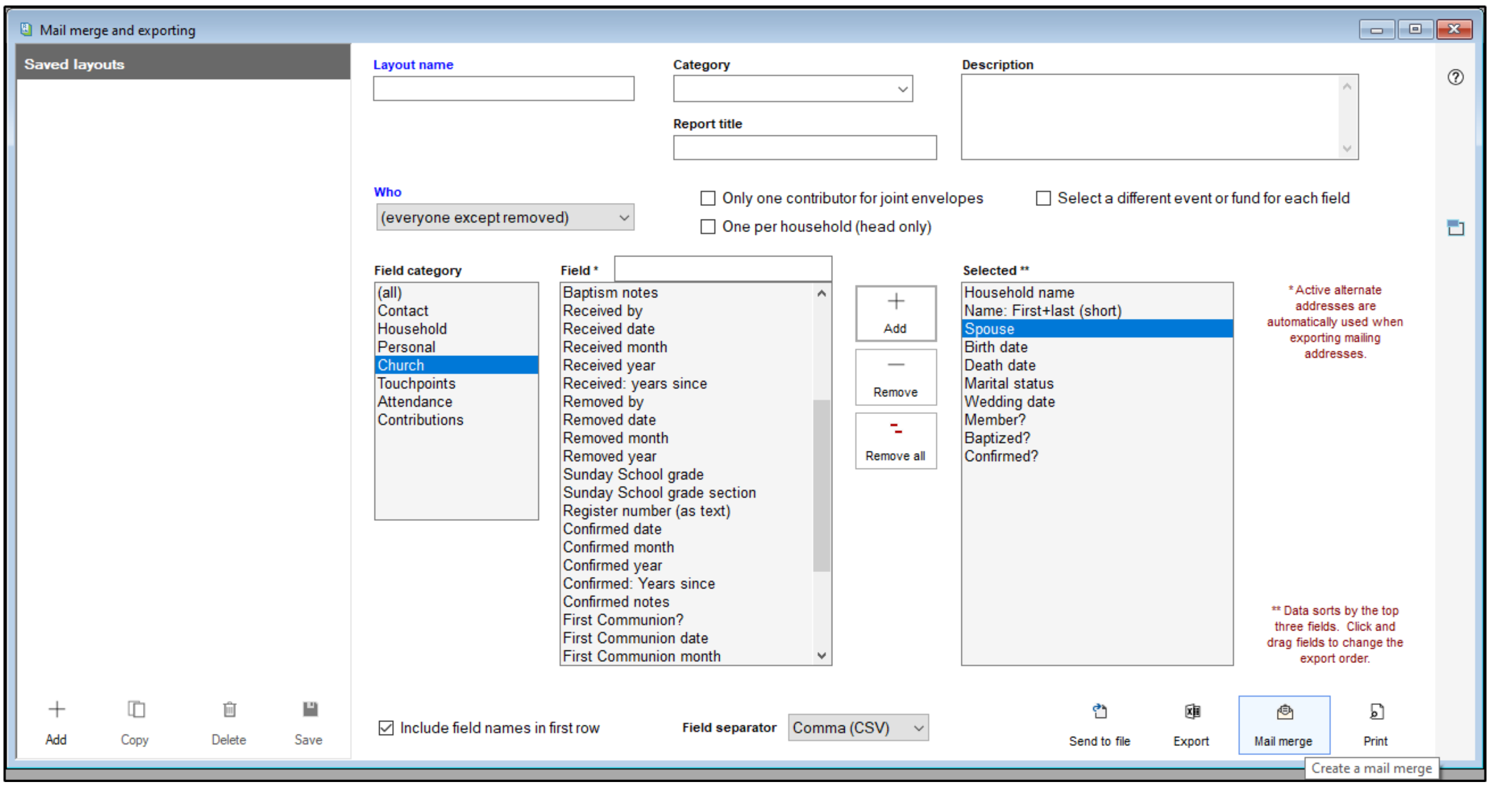


Intelligent Mail Bar Codes—If you need to use Intelligent Mail Bar Codes on your labels, click the button at the bottom of the window for Setup IMB. Your postmaster should have given you a Mailer ID number, and after you enter that in the specified field, your labels will print with Intelligent Mail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

# Mail Merge

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

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




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

1. First, if the mail merge you will be setting up is one you will need to prepare again frequently in the future, you will want to set this up as a Layout. Press the "Add" button down in the bottom left corner of the window, and then fill out the name you would like to use for the layout. You can then add it to a category in the category field, give it a report name and input a brief description in the description field.
2. The next step is to choose the group for which you need this mail merge for. In the Who field you can select all records, a Subgroup of records, or even just one person or household. Apart from those

options, you can run the report for a specific list or grade, as well as using the built-in Household Newsletter group. There are three checkboxes that modify the output of this report.

- Only one contributor for joint envelopes —If you export out contribution information, this will ensure that each envelope, instead of each person, gets a single row of information.
- Select a different event or fund for each field —When printing for one event or one fund, check this box if you want to select a different event/fund for each field, which allows you to print a comparison report with a different event/fund in each column
- One per household (head only) —When exporting out your information, this will ensure that each household, instead of each person, gets a single row of information

3. Next, select which area you want to pull fields from in the Field category box. In this box, you can select from different areas of Shepherd's Staff that have different fields. If you need to use a combination of fields from different areas, use the (all) option to have all fields from all areas available to you.
4. In the field column, scroll through the list to find the fields you would like to have included in your Mail Merge. Once you have found a field you want to add, double click it to add it to the Selected column. You can also highlight the field you'd like to add and click the "Add" button to add the field to the Selected column. If you need to remove any fields from the Selected column, double click the field, or click on it and then click the "remove button". If you want to clear the selected column, click "Remove all"
5. Once you have selected all the fields you want, check the box if you want to include field names in the first row of your export. Then, choose what you want to use for your field separator. Comma(CSV) will separate each field for each person with a comma and produce a CSV file when clicking Send to File. Tab and Pipe will use a tab and pipe respectively to separate each field for each person and will produce a TXT file when using the Send to File option.
6. Click Export to pull up your data in your chosen Spreadsheet program (usually Microsoft Excel). If you click the Mail Merge option, this will take you directly to Microsoft Word to a Word Macro document. Print will provide you with a printable version of the fields you selected.

## Creating a Form Letter with Mail Merge

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

1. Following the steps in the previous section, choose comma for your field separator and click "Send to File". Save your CSV file with a name you will easily recognize in a location you can easily find (your desktop is a good option.)
2. Open the letter you want to insert fields into in Microsoft Word.
3. Click on the Mailings tab, click the down arrow on "Select Recipients" and choose "Use an Existing List"

4. Select your Mail Merge file you exported, and click Open. Click OK at the next window.
5. Click at the point you want to insert one of your fields from your Mail Merge, and then, in the toolbar, click the drop down arrow for "Insert Merge Field" and select which field you want in the spot you have selected. Repeat this process til you have placed all the fields that you want within your letter.
6. When you're finished, you can click the Preview Results button on the toolbar to preview what your letter will look like with actual data. When you're ready to print, click Finish and Merge and choose Print documents to print out your letters.

# Report Writer

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

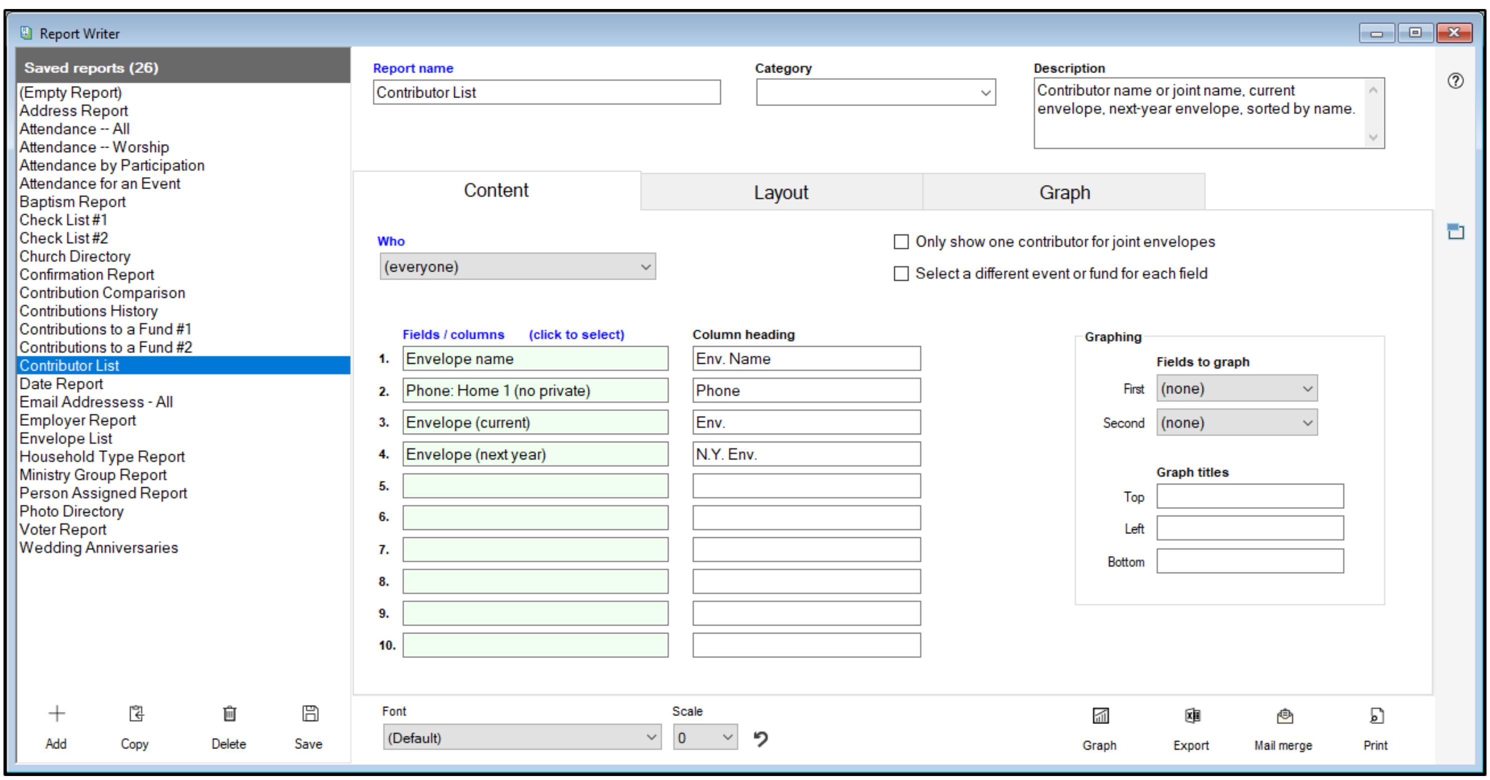
You can print up to 10 pieces of information (fields) about people in your database. This information can be printed for all people, for a list, for a subgroup, or even for just one person.

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

1. Access the Report Writer by clicking on the Reports button (Button with an R and a graph on it) in the Shepherd's Staff Central Toolbar and select "Report Writer"
2. On the bottom left hand corner of the window, if you are creating a new report, click the "Add" to create a new, blank report.
3. In the Report name field, erase "New report" and fill in the title of the report you are creating. You may also provide it with a category and a description.
4. If you are using or updating a saved report, simply click on that report in the saved reports window.
5. In the Who section, select who you will be generating this report for.
6. If your report will involve contribution information, and you only want to include one contributor per envelope check the box for "Only show one contributor for joint envelopes". If your report will be looking at multiple funds or events, and you want to see data on each fund, or each event, check the box for "Select a different event or fund for each field".
7. In the Fields/columns box, click in the first box to select the first field that you want to add to your report.
8. In the Select a field box, first pick from the category you want to look in, and then select the field you want to use from the list. You can search for a particular field by using the search box above the field window and pressing enter.
9. Repeat steps 7 & 8 to select each field you want to appear in your report. Each field you select will appear as a column in your report.
10. Next, click the layout tab. In the layout section, you can choose if you want your report to be oriented in portrait, landscape or a specialized option. Specialized options include photo directory options for people or households, a sign in sheet, a checklist by day, week, or month, or mailing labels. If choosing one of the photo options, you can choose your photo size, and you're provided with a few checkboxes for

options, such as adding a frame around your pictures, including those who don't have a picture, and to include the photo description

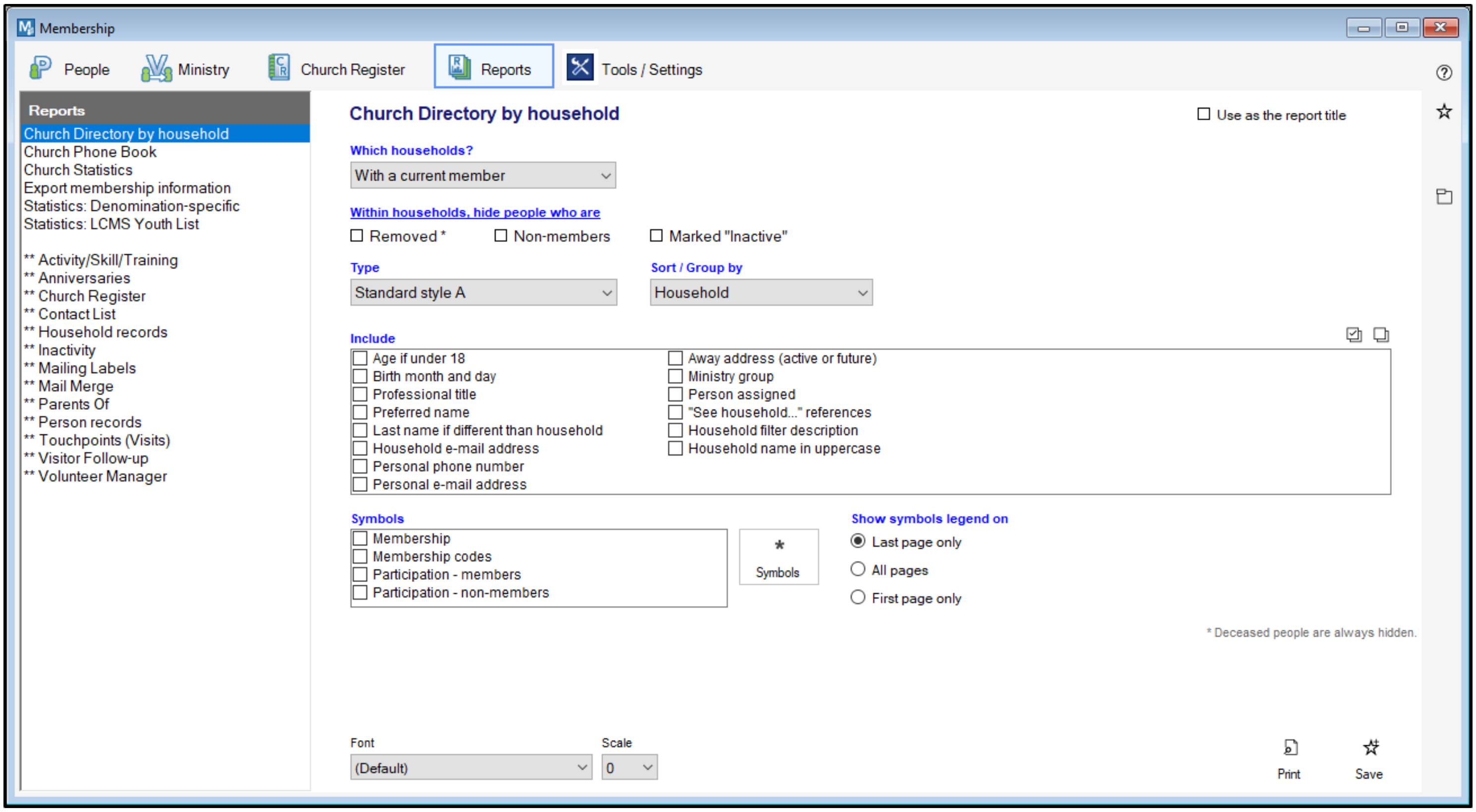
11. In the sorting section, you can choose up to 3 fields to sort by. If you want to sort in descending order for that column instead of ascending order, check the "Descending" box for that field.
12. In the grouping section, you can choose options if you want to group by your first field (So, for example, if you used Person Assigned).
13. Choose any options you want in the option section, such as being able to only show your header on your first page, truncating text if it exceeds your column width, and separating rows with a line. You can also insert up to 3 custom report headings.
14. If you want to graph the fields you've selected, click the Graph tab to see your fields represented on a graph.
15. Click the Save icon if you want to use this same report again in the future.
16. You can then either print your report, export your report to excel, send it to a word doc for a mail merge, or graph it by clicking the buttons in the bottom right corner of the page.



# Church Directory by Household

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

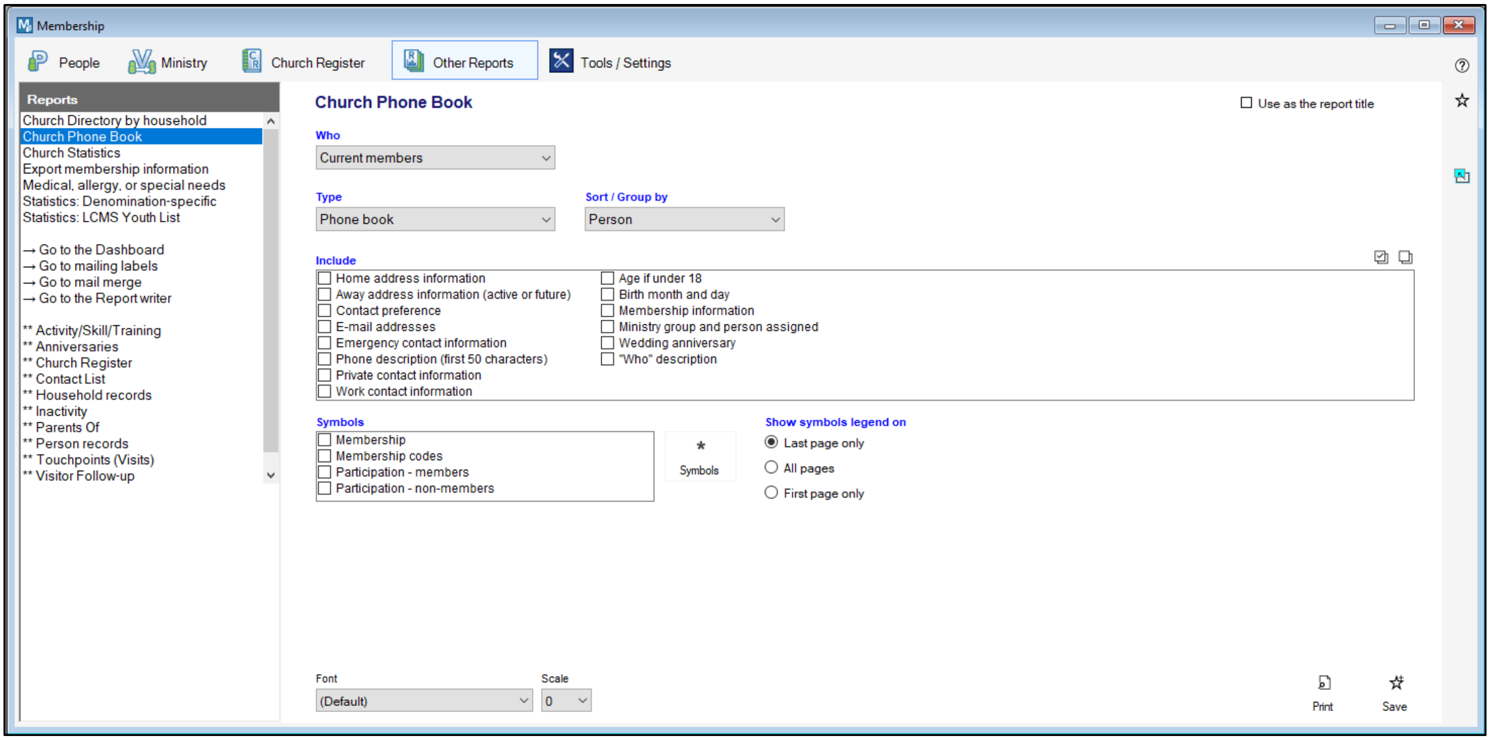
1. In the Membership Module of Shepherd's Staff, click the Other Reports tab and choose "Church Directory by household" in the reports menu.
2. First, select which group of households you'll be running this report for in the "Which households?" field. You can pick from households with current members,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


Membership
People
Ministry
Church Register
Reports
Tools / Settings
Reports
Church Directory by household
Church Phone Book
Church Statistics
Export membership information
Statistics: Denomination-specific
Statistics: LCMS Youth List
** Activity/Skill/Training
** Anniversaries
** Church Register
** Contact List
** Household records
** Inactivity
** Mailing Labels
** Mail Merge
** Parents Of
** Person records
** Touchpoints (Visits)
** Visitor Follow-up
** Volunteer Manager
Church Directory by household
Use as the report title
Which households?
With a current member
Within households, hide people who are
Removed *
Non-members
Marked "Inactive"
Type
Standard style A
Sort / Group by
Household
Include
Age if under 18
Birth month and day
Professional title
Preferred name
Last name if different than household
Household e-mail address
Personal phone number
Personal e-mail address
Away address (active or future)
Ministry group
Person assigned
"See household..." references
Household filter description
Household name in uppercase
Symbols
Membership
Membership codes
Participation - members
Participation - non-members
Symbols
Show symbols legend on
Last page only
All pages
First page only
* Deceased people are always hidden.
Font
(Default)
Scale
0
Print
Save

# Church Phone Book

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

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



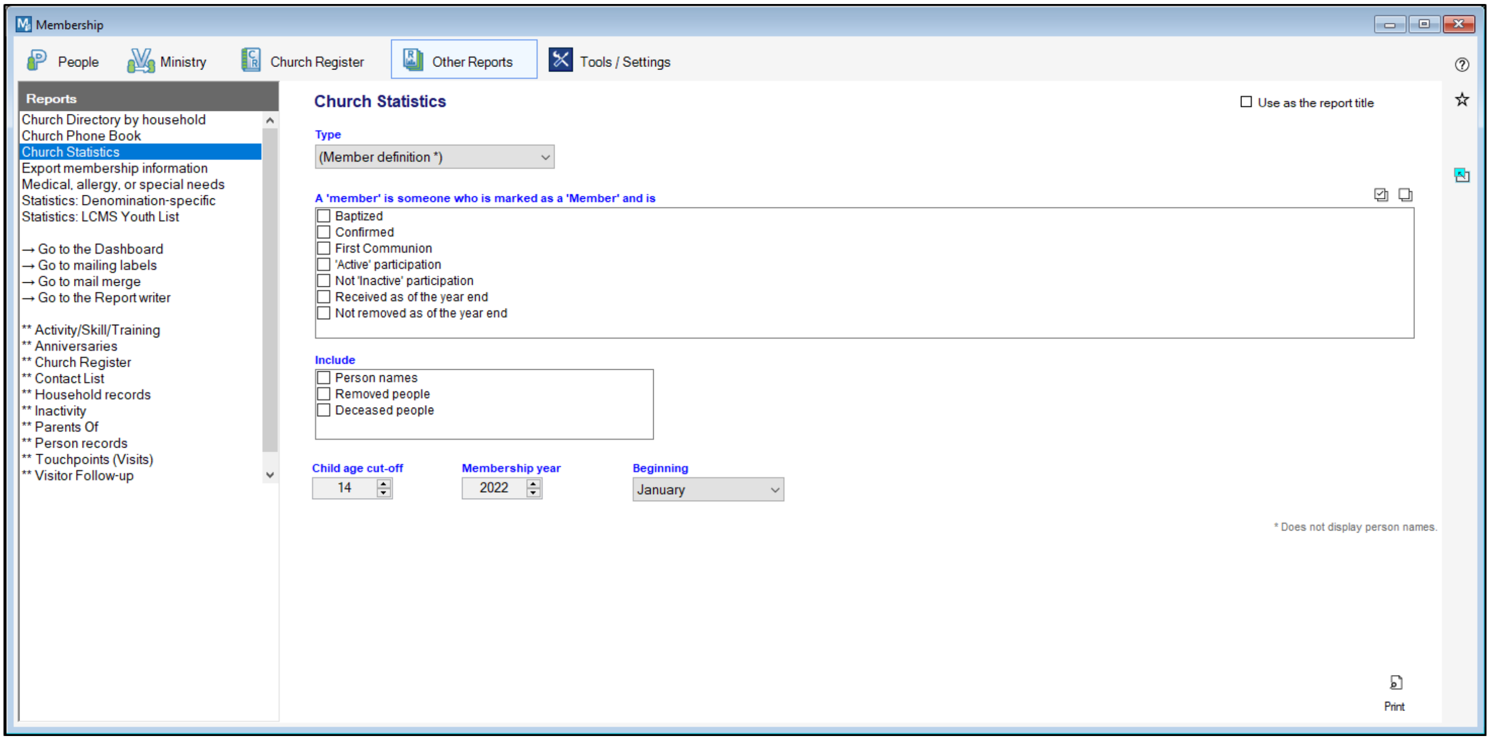
Membership
People
Ministry
Church Register
Other Reports
Tools / Settings
Reports
Church Directory by household
Church Phone Book
Church Statistics
Export membership information
Medical, allergy, or special needs
Statistics: Denomination-specific
Statistics: LCMS Youth List
→ Go to the Dashboard
→ Go to mailing labels
→ Go to mail merge
→ Go to the Report writer
** Activity/Skill/Training
** Anniversaries
** Church Register
** Contact List
** Household records
** Inactivity
** Parents Of
** Person records
** Touchpoints (Visits)
** Visitor Follow-up
Church Phone Book
Use as the report title
Who
Current members
Type
Phone book
Sort / Group by
Person
Include
Home address information
Away address information (active or future)
Contact preference
E-mail addresses
Emergency contact information
Phone description (first 50 characters)
Private contact information
Work contact information
Age if under 18
Birth month and day
Membership information
Ministry group and person assigned
Wedding anniversary
"Who" description
Symbols
Membership
Membership codes
Participation - members
Participation - non-members
Symbols
Show symbols legend on
Last page only
All pages
First page only
Font
(Default)
Scale
0
Print
Save

# Church Statistics

The Church Statistics Report provides you with geographic and demographic information about your congregation.

When preparing your Church Statistics reports, you first must define what a member of your church is based on criteria from a person's record. You also need to select when Shepherd's Staff is pulling the statistics from, and what age constitutes if someone is a child or an adult.

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


Membership
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** Anniversaries
** Church Register
** Contact List
** Household records
** Inactivity
** Parents Of
** Person records
** Touchpoints (Visits)
** Visitor Follow-up
Church Statistics
Use as the report title
Type
(Member definition *)
A 'member' is someone who is marked as a 'Member' and is
Baptized
Confirmed
First Communion
'Active' participation
Not 'Inactive' participation
Received as of the year end
Not removed as of the year end
Include
Person names
Removed people
Deceased people
Child age cut-off
14
Membership year
2022
Beginning
January
* Does not display person names.
Print

# Denomination Specific Report: Lutheran - LCMS

The Congregation Annual Report (LCMS) is exclusively used by Lutheran Church—Missouri Synod churches. This report is designed specifically to assist users in filling out the yearly Congregational Statistics Report requested by the Lutheran Church—Missouri Synod's Office of Rosters and Statistics.

These reports are usually expected to be returned about the end of February. Contact the LCMS Office of Rosters and Statistics if you have any questions about completing the Congregational Statistics Report.

The LCMS report contains the following tabs:

» Church Info—Contains general church information. Note that the church contact information fields are filled with information entered on the System Settings window (accessed from the main menu, Utilities button, Settings, Church tab).

» Membership—Contains information about membership figures such as baptized membership, and membership gains and losses

» Demographics—Contains information about the age of your membership, including average and percentage of membership by age.

» Attendance/activity—This tab allows you to designate which attendance events should be considered for calculating your church's average attendance, as well as Vacation Bible School attendance, as well as Sunday School, training classes and confirmation class attendance

» Financials 1—This tab allows you to select which income and expense accounts should be considered for calculating receipts and disbursements from your church. Please note that use of the finance module is required to get information filled in for this tab.

Notes on this report:

» This report is looking for the specific terms for Received By and Removed By fields as listed below. Users are encouraged to check that their member information in their database is using these terms before running this report.

If you find a term is incorrect, you can use the Mass Update utility to fix those discrepancies.

**Received By Terms:**

Affirmation of Faith

Profession of Faith

Transfer LCMS

Other LCMS

Other Lutheran

Receive ELCA

Receive WELS

Non-Lutheran

**Removed By Terms:**

Death

Transfer LCMS

Other LCMS

Other Lutheran

Release ELCA

Release WELS

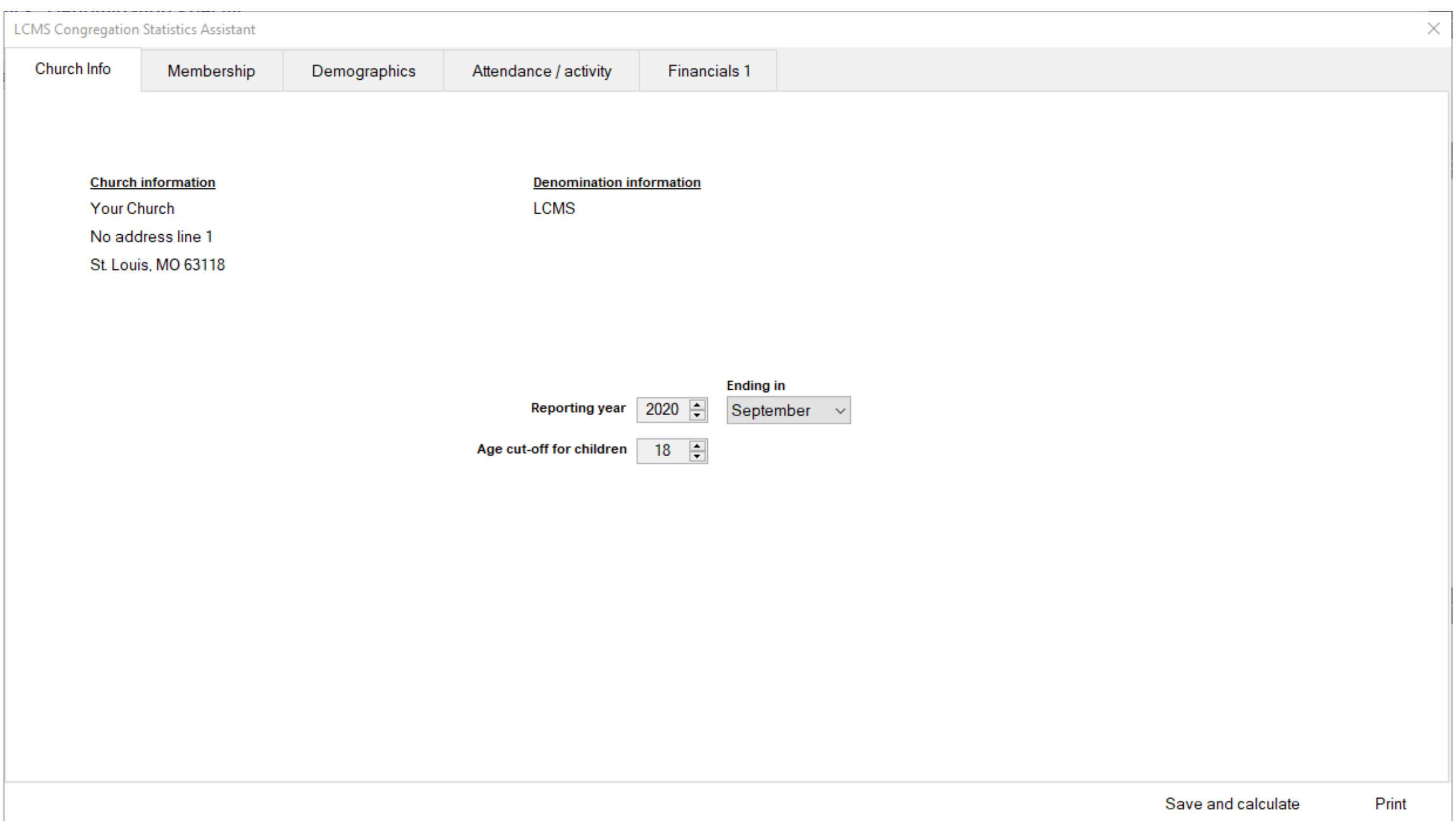
Non-Lutheran

Moved (No Transfer)

Excommunication

Inactivity

Other



1. Select other Reports within the Membership Module
2. Select the "Statistics: Denomination-specific" option on the list of reports
3. In the "Denomination" field, select "Lutheran - LCMS" and then click the "Select" button
4. On the Church Info tab, set your Reporting Year and what month your report ends in. The "Age cut-off for children" determines at what age a person is considered an adult instead of a child on the Membership tab.
5. The Membership tab will show you your membership statistics including Total Baptized and Confirmed membership, and membership gains and losses. Click the question mark button next to each figure to see how that figure is being calculated, or click the i button to see who is included within the figure the button is associated with.
6. The Demographics tab will display age information about your congregation. Click the i button next to the fields that have them to see who is included in that field.
7. The Attendance/activity tab is where you can pick which attendance events, and what training/confirmation classes should be included to figure out your church's weekend worship attendance, vacation bible school attendance, and who is in each training class. Click the button with the check marks and lines next to each field to make your selection on what events/trainings should be included on each field
8. The Financials 1 screen is where you can select which  accounts should be considered for receipts and disbursements. Click the button with the check marks and lines next to each field to make your selection on what accounts should be included in each field.
9. Click the Save and calculate button to update any calculated fields with information after filling the fields on each tab. When you've completed the last tab, click the Print button to get a preview of your Report, and then click print to print out your report.

# Denomination Specific Report: Lutheran - WELS

The Congregation Statistics Report (WELS) is exclusively used by churches of the Wisconsin Evangelical Lutheran Synod. This report is designed specifically to assist users in submitting their statistics report to the Wisconsin Evangelical Lutheran Synod.

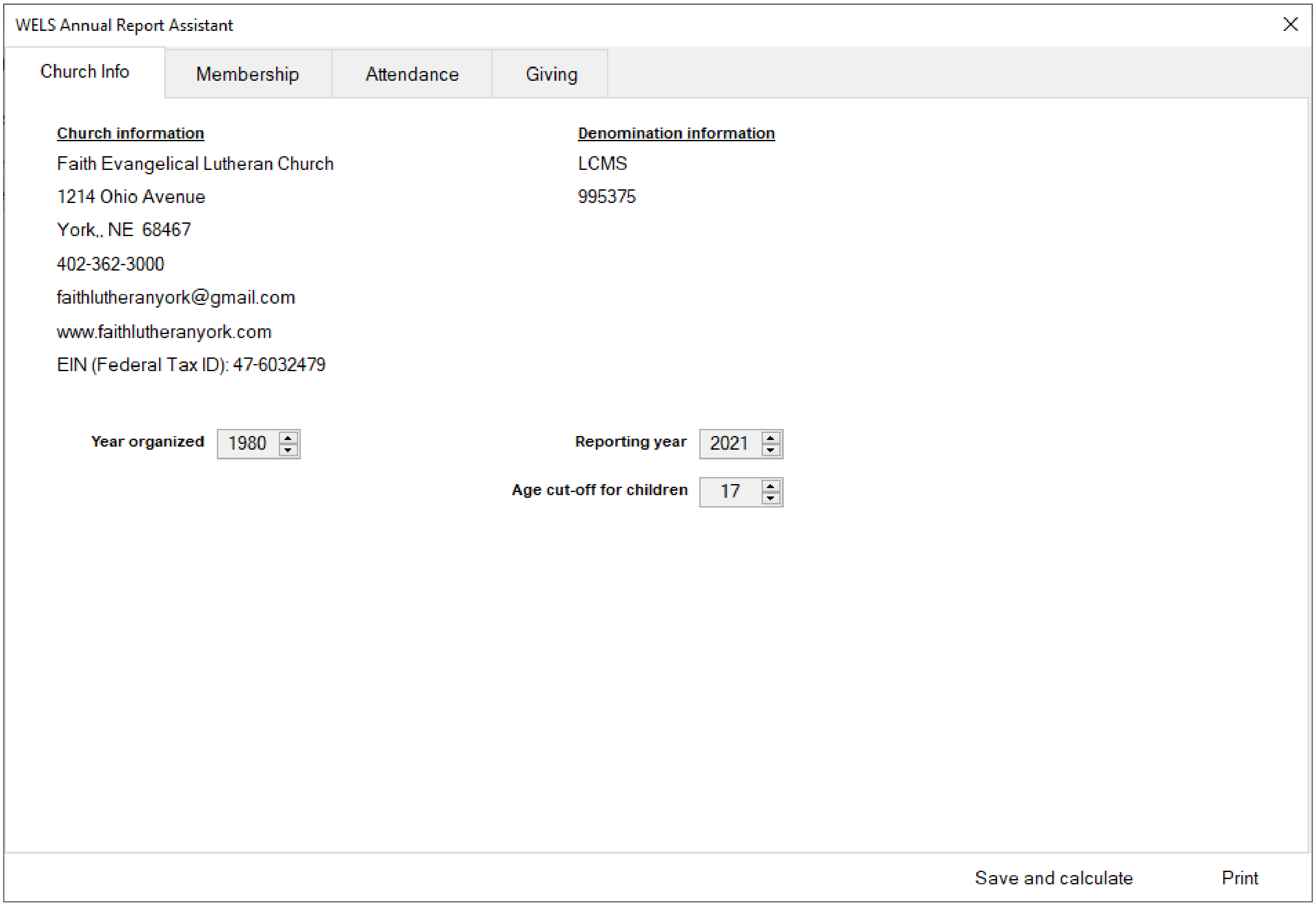
This report contains the following tabs:

» Church Info—General church information. Some of this information will already be filled out with information from the Church tab of the program settings screen accessed from the system menu of Shepherd’s Staff.. The reporting year indicates the year you are running this report for.

» Membership—This tab contains information about the number of Communicant and Baptized members your church has at the end of the prior year, the baptisms that took place this year, as well as Membership Gains and Losses and Communicant membership at the end of the reporting year.

» Attendance—This tab is where you can select which events make up your average weekly church attendance, VBS attendance, Sunday School Attendance, and Bible class attendance. Various school information is also filled in under this tab.

» Giving—This tab is where you can designate which accounts comprise giving for local ministry, missions and other areas. This will also show you giving averages as well. The finance module must be used in order to get information on the giving tab.




Notes on this report:

» The report prints out annual statistical data for a single calendar year (January through December). It cannot be printed for a non-calendar year or any time period other than 12 months. The WELS statistical office usually requires the report for the previous year from the church by January 31 of the following year.

» When you opt to Print the report it is automatically re-calculated for you. The separate Save and calculate button is provided so that you can see the report figures on each tab (as you fill it out) without having to first print or email/export the report.

» The report will only be able to determine who the baptized and communicant members are if the correct terms are being used for the Received by and Removed by fields within Individual records. Below is a listing of the accepted Received by and Removed by terms that should be used for accurate reporting:

**Received By Terms:**
Profession of Faith

Transfer WELS
Transfer

**Removed By Terms:**
Death
Transfer WELS
Transfer
Other Lutheran
Other Christian

1. Select Other Reports within the Membership Module
2. Select the "Statistics: Denomination-specific" option on the list of reports
3. In the "Denomination" field, select "Lutheran - WELS" and then click the "Select" button
4. In the Church Info tab, set your Year Organized (Year your church was established) as well as your Reporting year, and your Age cut-off for children, which determines at what age a person is considered to be an adult.
5. The Membership tab will show you your membership statistics including Total Baptized and Confirmed membership, and membership gains and losses. Click the question mark button next to each figure to see how that figure is being calculated, or click the i button to see who is included within the figure the button is associated with.
6. The Attendance Tab is where you can select what attendance events compose your Average weekly church attendance, VBS attendance, Sunday School Attendance, as well as Bible Class attendance. To select which events are to be included in each one of these fields, click the button next to the field that has checkmarks and lines on it. From here, you can select which attendance events should be included for the field. You will also need to fill in figures for information such as Number of Male and Female Elementary teachers, Sunday School teachers as well.
7. The Giving tab is where you can determine which income accounts are being used for different areas of giving. Click the button with the checkmarks and lines next to each field to select the relevant income accounts.
8. Click the Print button to see a preview of your report, and then click Print on the preview screen to print the report out.

# Denomination Specific Report: Lutheran - ELCA

The Congregation Annual Report (ELCA) is exclusively used by Evangelical Lutheran Church in America member churches  This report is designed specifically to assist users in filling out the yearly Congregational Report requested by the Evangelical Lutheran Church in America.

These reports are usually expected to be returned about the middle of February. Contact the ELCA Office of the Secretary if you have any questions about completing the Congregational Report.

The ELCA report contains the following tabs:

» Church Info—General church information—Note that the church contact information fields are filled with information entered on the System Settings window (accessed from the main menu, System button, Program Settings, Church tab). You will also fill out your reporting year, Primary Worship Events and Liturgy Language(s) here.

» Membership—This tab contains information about your baptized and confirmed membership for both the prior and current reporting year.

» Financials 1—This tab lets you select what accounts in your finance module are to be considered for Receipts for the selected reporting year.

» Financials 2—This tab lets you select what accounts in your finance module are to be considered for Disbursements for the selected reporting year.

» Financials 3—This tab includes additional account selections for disbursements for the selected reporting year.

Notes on this report:

» The report prints out annual statistical data for a single calendar year (January through December). It cannot be printed for a non-calendar year or any time period other than 12 months.

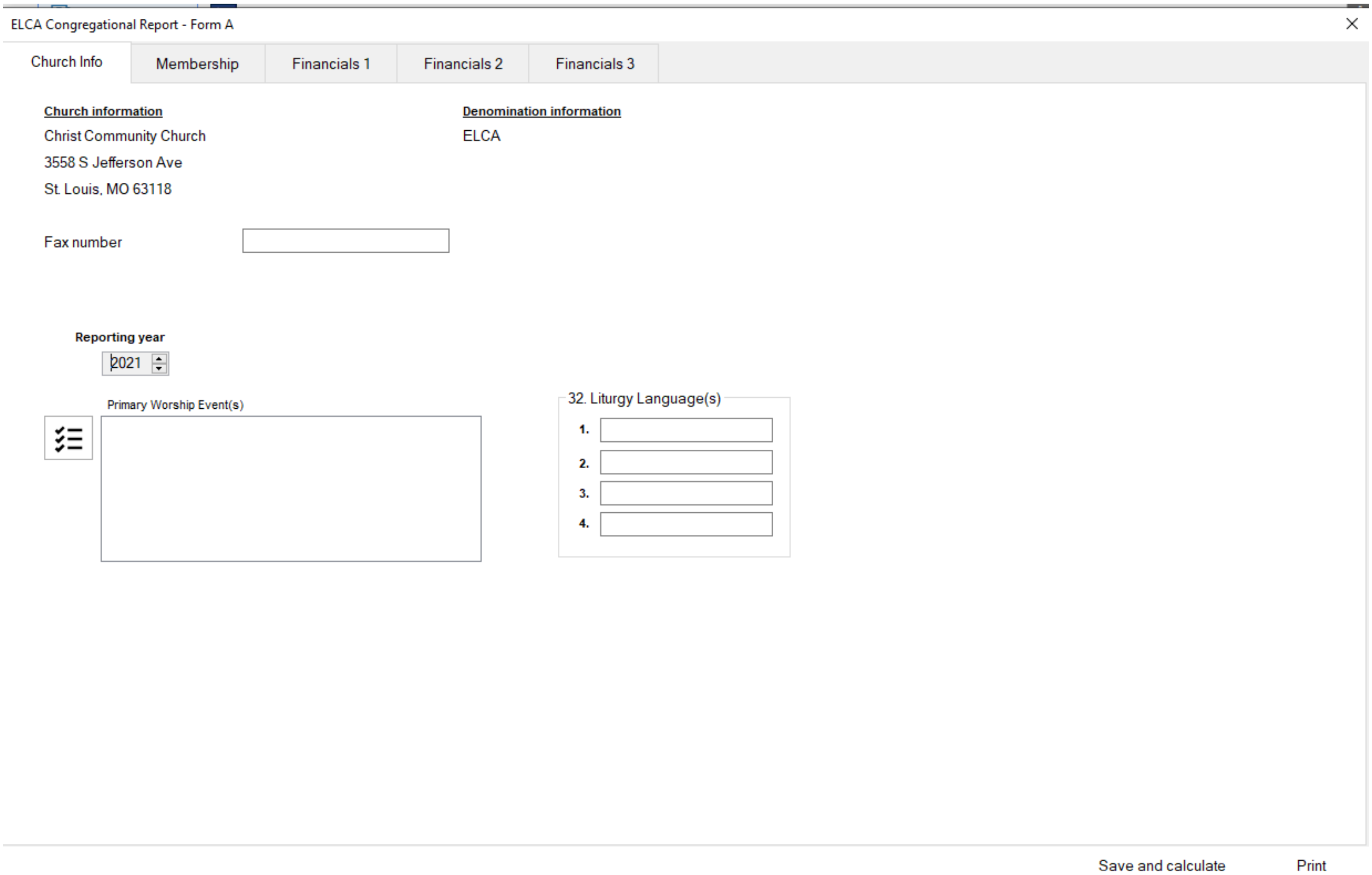
» You must be using the finance module of Shepherd's Staff in order to fill in information in the Financials Tab.

» This report is looking for the specific terms for Received By and Removed By fields. Users are encouraged to check that their member information in their database is using these terms before running this report.

The accepted terms are listed below:

**Received By Terms:**
Baptism
Affirmation of Faith
Transfer ELCA
Transfer
Other Lutheran
Transfer LCMS
Transfer WELS
Non-Lutheran
Other
Unknown

**Removed By Terms:**
Death
Transfer ELCA
Transfer
Other Lutheran
Transfer LCMS
Transfer WELS
Non-Lutheran
Moved (No Transfer)
Inactivity
Excommunication
Other




1. Select Reports within the Membership Module
2. Select the "Statistics: Denomination-specific" option on the list of reports
3. In the "Denomination" field, select "Lutheran - ELCA" and then click the "Select" button
4. In the Church Info tab, select your Reporting year in the reporting year field, and select your Primary Worship Event(s) by clicking the button with the checkmarks and lines to the left of the field. Also, fill out your Liturgy Language(s) in the Liturgy Language(s)
5. The Membership tab will show you your membership statistics including Total Baptized and Confirmed membership, and membership gains and losses. Click the question mark button next to each figure to see how that figure is being calculated, or click the i button to see who is included within the figure the button is associated with.
6. In the Financials Tab, click the button with the checkmarks and lines next to each field to select what accounts you want to use in that particular field.
7. At any point during the process, you can click the Save and calculate process to update the generated fields based on the information you've filled in.

8. Click the Print button to get a preview of your report. Click the Print button on the preview window to print out your report.

# Denomination Specific Report: Presbyterian - PCA

The Presbyterian Statistical Report—PCA is exclusively used by the PCA churches. This report has been designed specifically to meet the annual reporting needs of and follows the reporting specifications set out by the PCA. It contains the following tabs:

» Church Info—Lists general church information. Most of this information is filled in from the Church tab on the program settings  of Shepherd’s Staff. The “For the Membership Year”, field controls what year you’re running this report for.

» Membership 1—This tab contains Membership information, including membership gains and losses for the report year. Next to some fields, you’ll see a button that looks like a circle with an “i” in it. If you click this button, it will show you a window that will first tell you how that field is being calculated, and what received by and removed by terms are used, then, it will show you who is a part of that field. In the Beginning Communicant membership field, you can either fill this number in yourself, or, if you press the “reset” button, Shepherd’s Staff will calculate this figure for you.

» Membership 2—This tab contains more membership and attendance information. For the fields that have a button with checkmarks and lines on them next to the field, click that button and a window will appear. Select the relevant attendance event for the field. Next to some fields, you’ll see a button that looks like a circle with an “i” onit. If you click this button, it will show you a window that will first tell you how that field is being calculated.

» Financial 1, 2, and 3—These tabs allow you to pick the accounts that should be reported in each individual section. For the fields that have a button with checkmarks and lines on them next to the field, click that button and a window will appear. Select the relevant income, expense or dedicated accounts for the field.

» Other—Contains age and ethnic composition information.

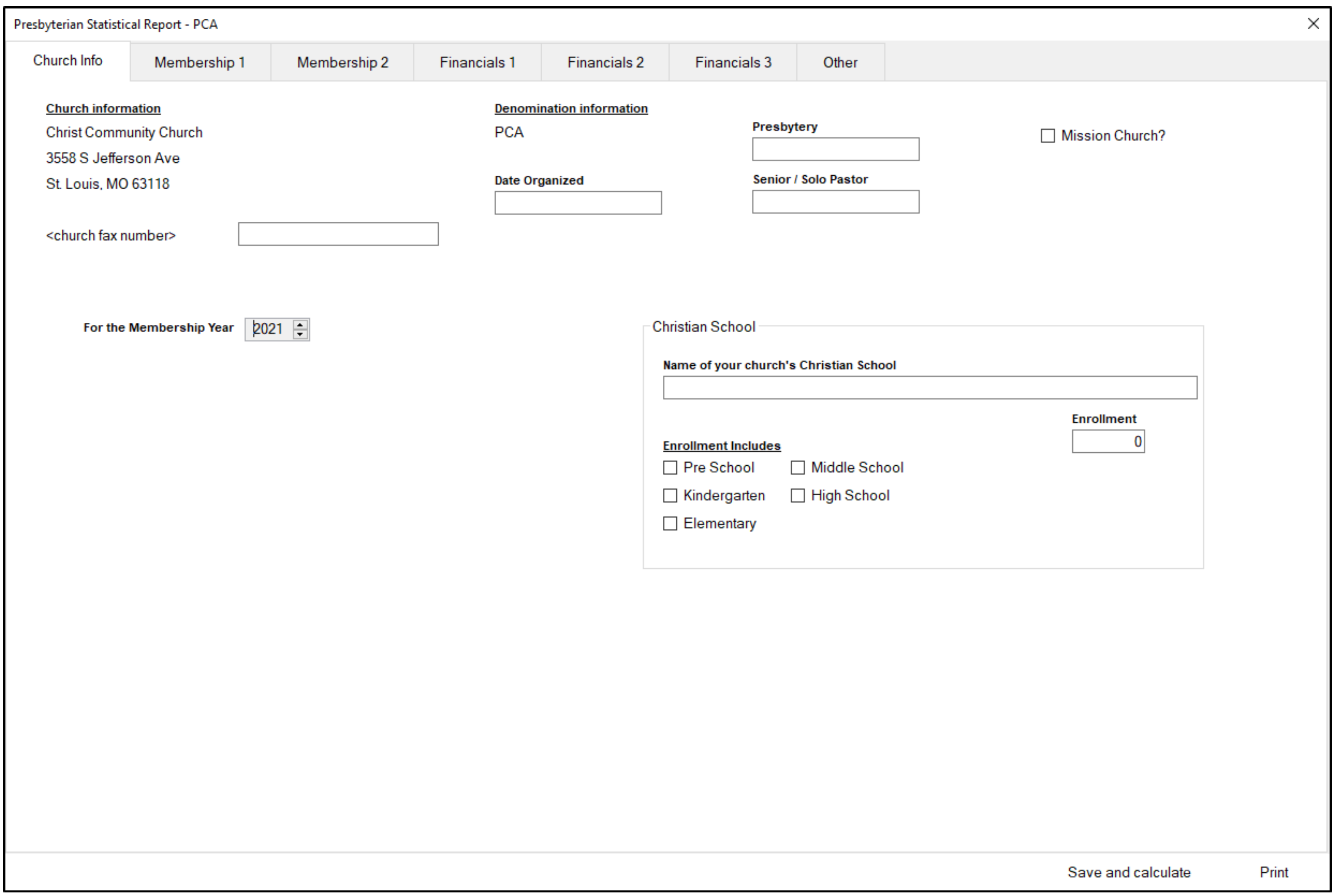
When you have filled out each of the tabs, press “Save and Recalculate” to update your report, and then press Print. This will show you your report, and you can then print the report out.

Notes on this report:

» This report is looking for the specific terms for Received By and Removed By fields as listed below. Users are encouraged to check that their member information in their database is using these terms before running this report.

**Received By Terms:**
Profession of Faith
Letter of Transfer
Certificate
Reaffirmation
Restoration

**Removed By Terms:**
Letter of Transfer
Certificate
Death
Discipline
Dismissal
Erasure
Excommunication




1. Select Other Reports within the Membership Module

2. Select the "Statistics: Denomination-specific" option on the list of reports
3. In the "Denomination" field, select "Presbyterian - PCA" and then click the "Select" button
4. In the Church Info tab, select which Membership Year you're running this report for, and fill out all information you have for your church, including Christian School information if your Church has a school.
5. In the Membership 1 tab, you can let Shepherd's Staff calculate your Beginning Communicant Membership by clicking the Reset button or, fill it in yourself. Shepherd's Staff will calculate each field automatically on this tab, but you have the option of filling in your own figure as well.
6. In the Membership 2 tab, you can let Shepherd's Staff calculate the fields, or enter them manually if you disagree with the fields as they're calculated for fields 16-20. For fields 21 and 22, click the button with the checkmarks and lines to select what events should be considered for average attendance at Sunday School and Worship respectively.
7. For Financials 1, 2 and 3, click the button with the checkmarks and lines next to each field to select which accounts from your finance module should be used in each field.
8. The Other Tab will show membership demographics by age and ethnic group, you can also fill in your own figures if you prefer.
9. Click Save and calculate to update the fields with the information you filled in. When finished filling in the report, click the Print button to generate a preview of your report, and click print on the preview window to print your report out.

# Denomination Specific Report: Presbyterian - PC/USA

The Presbyterian Statistical Report—PC(USA) is exclusively used by the PC(USA) churches and this report has been designed specifically to meet the annual reporting needs of the PC(USA) and follows the reporting specifications set out by it.

This report contains the following tabs:

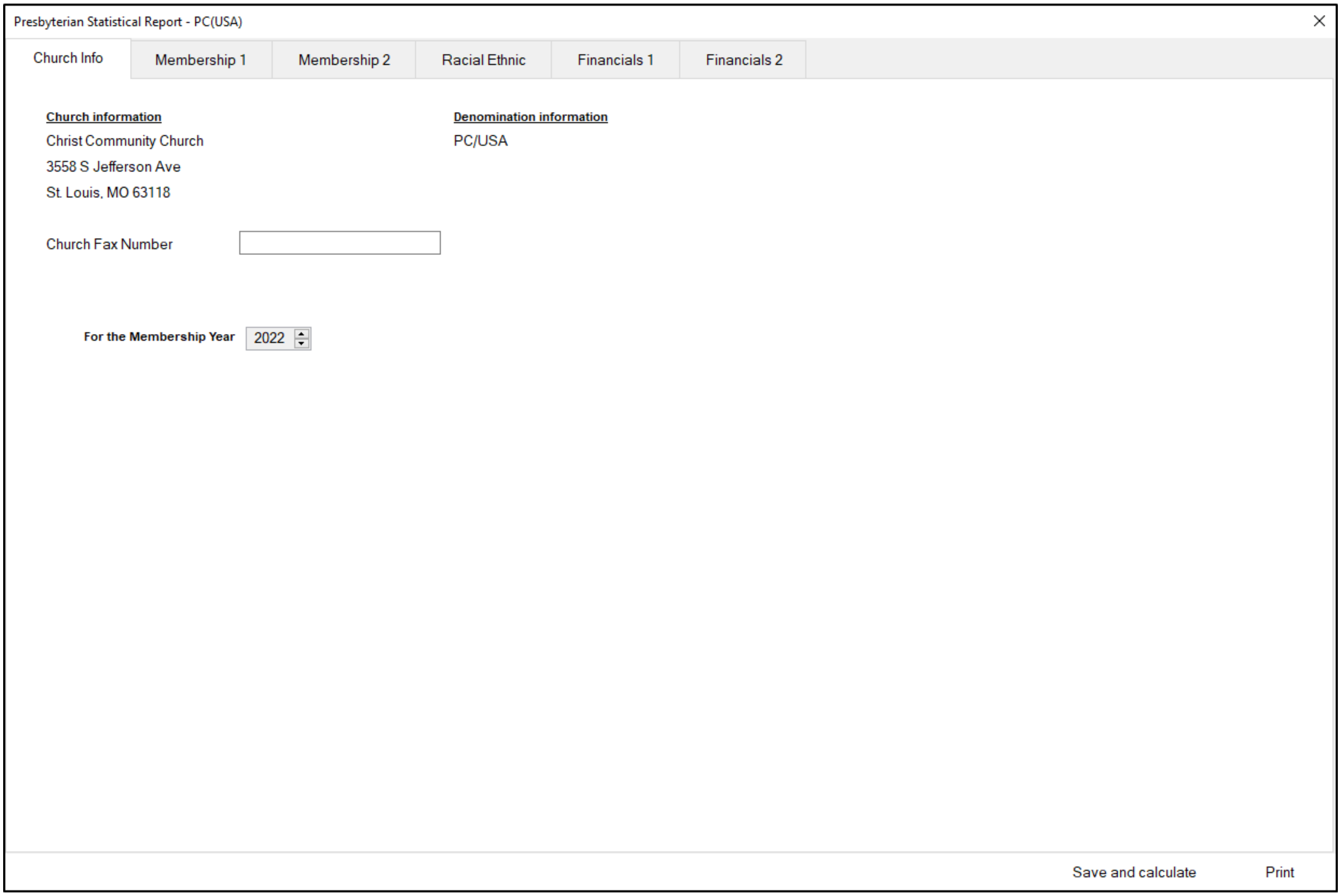
» Church Info—Lists various church contact information. Most of this information will be filled in by the information entered on the Church tab of the program Settings screen from the System Menu of Shepherd’s Staff. The “For the Membership Year” field represents the year that you’re running this report for.

» Membership 1— This tab displays statistical information on your Membership as calculated by the data you have input into Shepherd’s Staff. Next to some fields, you’ll see a button that looks like a white circle with an “i”. If you click this button, it will show you a window that will first tell you how that field is being calculated, and what received by and removed by terms are used, then, it will show you who is a part of that field. Each field can be manually entered, if you have the number, or, if you click “Reset”, Shepherd’s Staff will calculate this number for you.

» Membership 2— This tab displays statistical information based on attendance, activities and Sunday school grades. For the fields that have a button with checkmarks and lines, click that button and a window will appear. Select the relevant Attendance Event, Activity or Sunday school grade for each field.

» Racial Ethnic—Displays the ethnic composition of active members, as well as let you list the number you have with a disability.

» Financial 1 and 2—Allows you to choose which accounts you want to report on. For the fields that have a button with checkmarks and lines next to them, click that button and a window will appear. Select the relevant Income, Expense, or Dedicated accounts for each field.




1. Select Reports within the Membership Module
2. Select the "Statistics: Denomination-specific" option on the list of reports
3. In the "Denomination" field, select "Presbyterian - PC/USA" and then click the "Select" button
4. In the Church Info field, set what year you want to run this report for in the field "For the Membership Year".
5. In the Membership 1 tab, you will see your Membership information, and Shepherd's Staff will calculate this for you automatically, based on the criteria that is displayed when you click the i button next to each field. If you'd prefer to enter this information manually, you can do so in each field.
6. The Membership 2 tab contains more membership and attendance information. For the fields that have the button with the checkmarks and lines, click on those buttons to determine what attendance events/activities should be considered for those fields.
7. The Racial/Ethnic tab will provide a breakdown of your congregation by race. You will also have the opportunity to fill in the number of people you have in your church who have a disability.

8. The Financials 1 and 2 tabs allow you to choose which accounts from your Finance module should be considered for each field by clicking the button with checkmarks and lines next to that field.
9. When finished, click save and calculate to have the report update any automatically generated fields.
10. Click Print to see a preview of your report, and at the preview screen, click print again to get a printed copy of your report.

# Denomination Specific Report - Southern Baptist

The Annual Church Profile Report (ACP) is exclusively used by the Southern Baptist churches. This report has been designed specifically to meet the annual reporting needs of and follows the reporting specifications set out by the Southern Baptist Church. Consult your denominational guidelines for a description of each line on the report, and how numbers are calculated.

To access the Annual Church Profile (ACP) report, in the membership module, click on other reports, and choose "Statistics Denomination-specific" and then choose Southern Baptist from the Denomination drop down list.

For any field that has a speech bubble with a lowercase “i” in it, you can click on this icon and see how that field is being calculated.

Each tab covers a range of questions for the ACP report:

» Church Info—General church information. The “Reporting Year” references which year you’re running the report for, and the “Ending in” field signifies what month you’re running this report through within the reporting year.

» Membership— This section shows you your total number of members, total number of baptisms, and any other ways you received new members through the course of the reporting year.

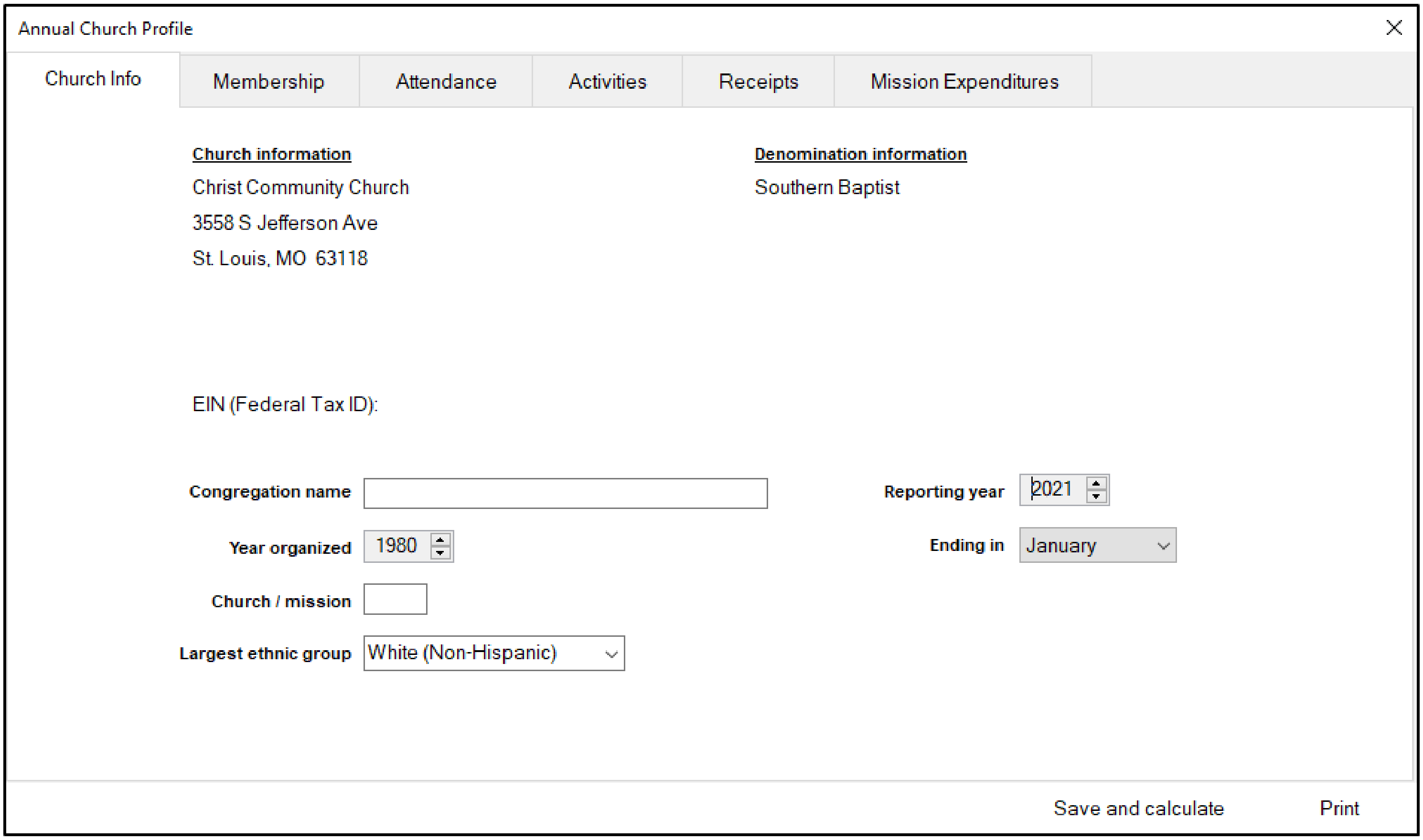
» Attendance—This section allows you to select which event should be considered for Weekly Worship Attendance and Sunday School/Bible Study/Small Group attendance.

» Activities—This section will allow you to select which activities should be considered for VBS Enrollment, and Total Mission Project Participation

» Receipts—This section of the report allows you to select which accounts from your finance module should be considered when calculating your total giving for your church

» Mission Expenditures—This section of the report allows you to select which account from your finance module should be considered when calculating your expenditures towards missions.

Consult your denominational guidelines for a description of each line on the report, and how numbers are calculated.




1. Select Reports within the Membership Module
2. Select the "Statistics: Denomination-specific" option on the list of reports
3. In the "Denomination" field, select "Southern Baptist" and then click the "Select" button
4. In the Church Info tab, set your Reporting year and Ending in year and month respectively. Also fill out your congregation name, Year Organized, Church/mission and Largest Ethnic group fields
5. In the Membership tab you can review the numbers that are calculated within the fields listed on this tab. To see how these fields are being calculated, click on the button with the question mark. If you click the button with the lowercase i in it, it will tell you who is included in that field.
6. In the Attendance tab, you can select which events should be considered for Weekly Worship Attendance, and Sunday School/Bible Study/Small Group attendance. Click the button with the checkmarks and lines next to each field to select which attendance events should be included.
7. In the Activities tab, you can select which activities should be considered for VBS Enrollment and Total Mission Project Participation. Click on the button with the checkmarks and lines next to each field to select which attendance events should be included.
8. The Receipts tab lets you pick which accounts from your finance module should be considered for your Undesignated, designated and other Receipts/Income.  Click on the button with the checkmarks and

lines next to each field to select which attendance events should be included.

9. The Mission Expenditures field lets you pick which accounts from your finance module should be considered for your various mission expenditures at your church. Click on the button with the checkmarks and lines next to each field to select which attendance events should be included.
10. Click the Save and calculate button to update any calculated fields with information after filling in the fields on each tab. When you've completed the last tab, click the Print button to get a preview of your Report, and then click print to print out your report.

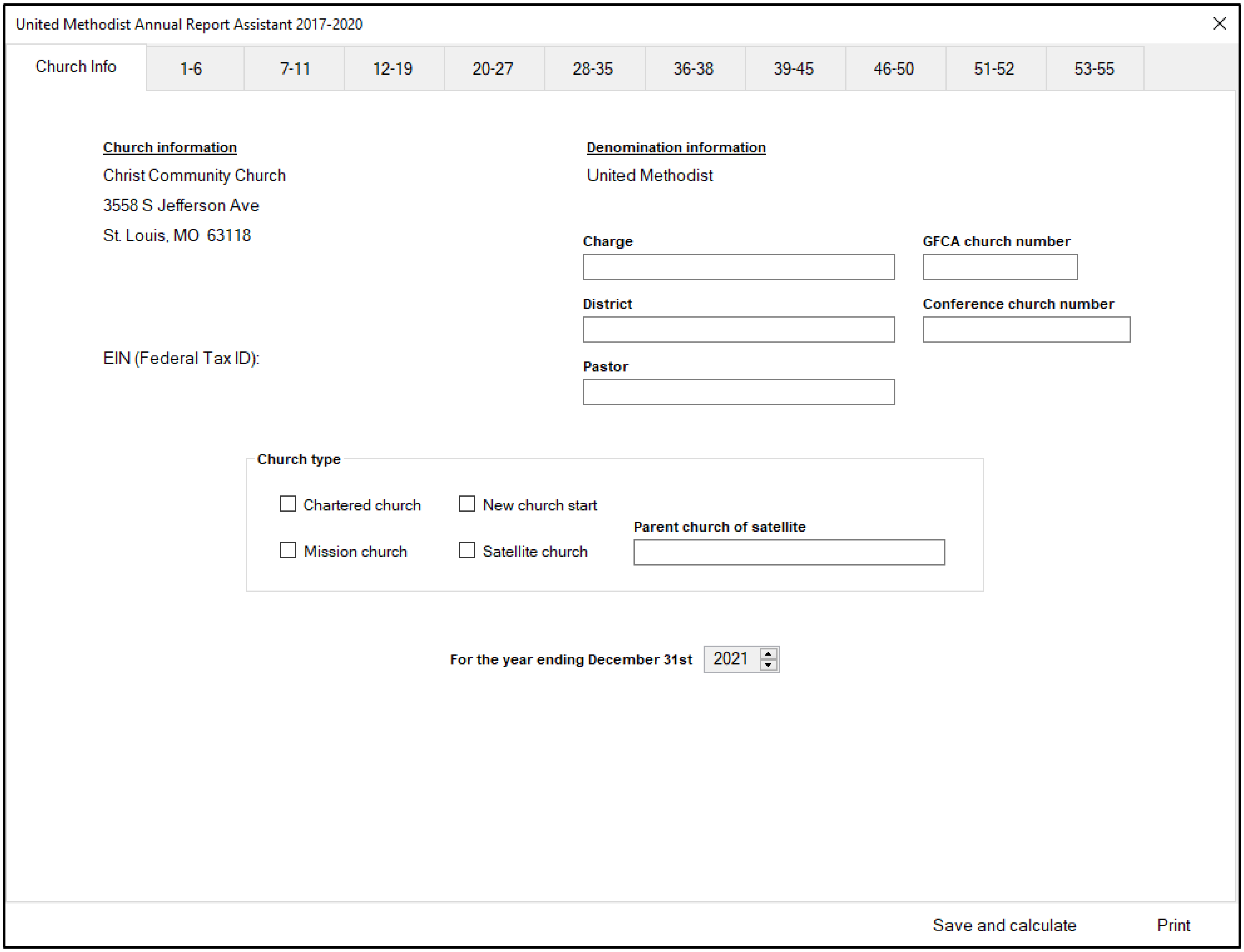
# Denomination Specific Report: United Methodist Tables I/II/III

The United Methodist Tables I/II/III report is exclusively used by the United Methodist Church. The United Methodist Tables I, II & III Report has been designed specifically to meet the annual reporting needs of the United Methodist church and follows the reporting specifications set out by it. Consult your denominational guidelines for a description of each line on the report and how numbers are calculated.

For any field that has a circle with a lowercase "i" in it, you can click on this icon and see which people are a part of that field. For any field that has a circle with a question mark in it, you can click on this icon and see how the field is being calculated.

1. Select Reports within the Membership Module
2. Select the "Statistics: Denomination-specific" option on the list of reports
3. In the "Denomination" field, select "United Methodist Tables I/II/III" and then click the "Select" button
4. In the Church Info tab, enter the appropriate information for your church. The "For the year ending December 31st" field determines the year for which the report is calculated. The Church information section on this tab is filled in from your Settings menu on the main menu of Shepherd's Staff.
5. Most fields in this report are filled in automatically by the data you have entered in Shepherd's Staff. If a field has a button with a question mark in it next to the field, you can click on that button to see how that field is calculated. Another button you may see is a white circle with an "i" in it. If you click this, it will tell you what people are included in that field.
6. In tab 1-6, you can see your total membership, your gains and losses for the year, and then totals of your professing members by ethnic origin and sex.
7. In tab 7-11, click on the button with the checkmarks and lines next to the box to include the appropriate attendance events or activities for each field.
8. In tab 12-19, click on the button with the checkmarks and lines next to the box to include the appropriate training classes, attendance event, activities, expense or dedicated accounts for each field
9. In tab 20-27, click on the button with the checkmarks and lines next to the box to include the appropriate Asset or Liability accounts.
10. In tabs 28-35, 36-38 and 46-50 click on the button with the checkmarks and lines next to the box to include the appropriate Dedicated or Expense accounts.
11. In tabs 51-52 and 53-55 click on the button with the checkmarks and lines next to the box to include the appropriate income or dedicated accounts.

12. When finished, click “Save and calculate” to populate the information for your report, and then click Print to see a preview of your completed report. Click Print on that window to print out your Annual Report.



# Denomination Specific Report: Annual Church Ministries Report (ACMR)

The Annual Church Ministries Report (ACMR) is exclusively used by Assembly of God churches. This report is designed specifically to assist users in filling out the report form due each year in January by allowing easy gathering of information in a single place.

For any field that has a circle with a lowercase “i” in it, you can click on this icon to see who is being included in that field. For any field that has a circle with a question mark in it, you can click that icon to see how that field is being calculated.

» Church Info—This tab looks at your basic church information, as entered in the main menu of Shepherd's Staff under Utilities>Settings in the Church Tab. You can also set your reporting year here as well, which represents what year this report is referencing.

» Statistics A—This tab allows you to select what events should be considered when calculating average attendance for various services and holidays. To select what events should be considered, click the button with the checkmarks and lines next to each field to pick which events should be considered. If a field has a white background, then you will need to fill in the field manually.

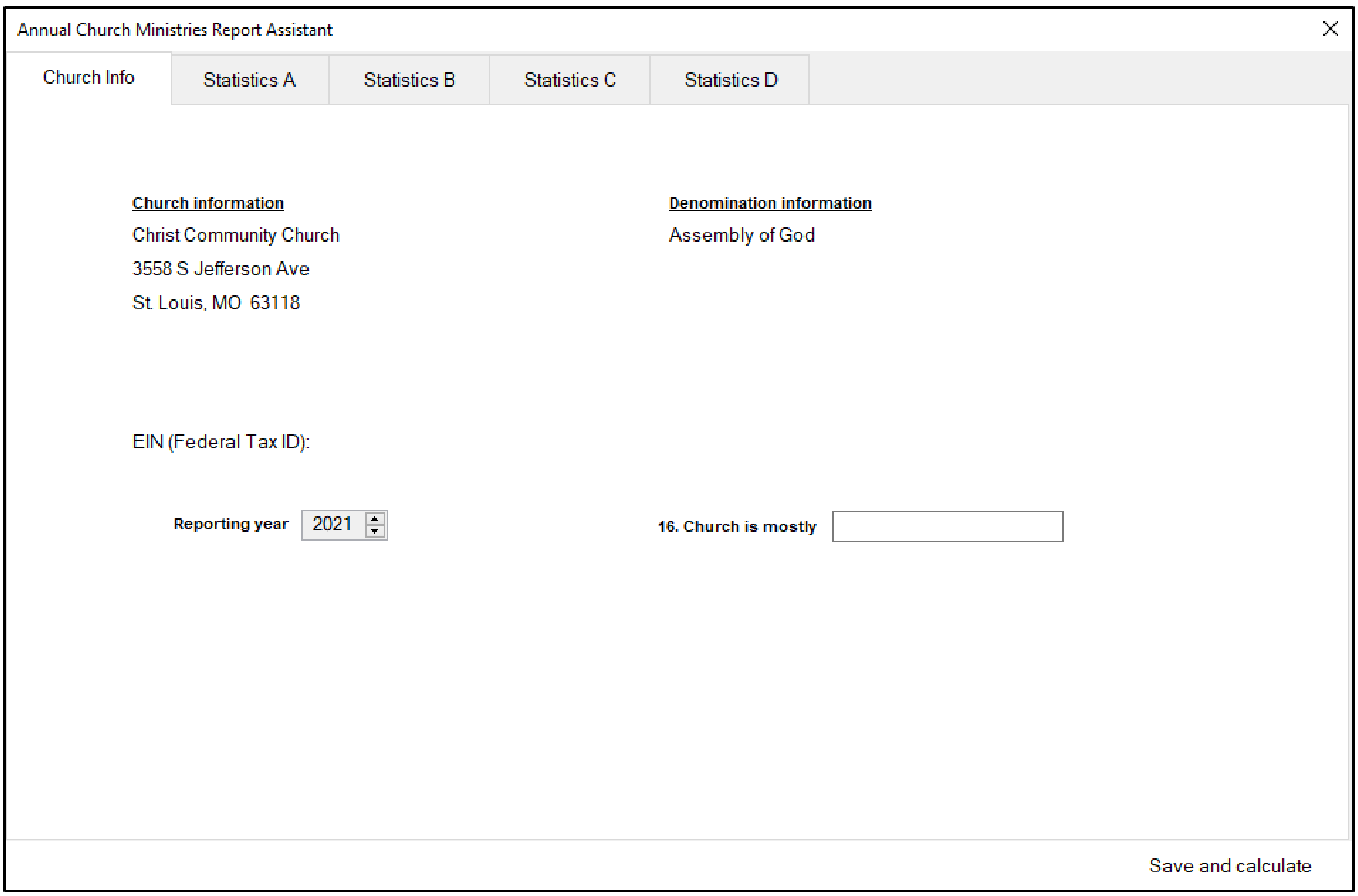
» Statistics B—This tab allows you to see your membership totals, including membership, number of first communions, water baptisms, and confirmations during the reporting year. For the "Average attendance of converts" field, to select what attendance events should be considered, click the button with the checkmarks and lines next to the field to pick which events should be considered. If a field has a white background, then you will need to fill in the field manually.

» Statistics C—This tab allows you to see your adherents broken down by race/ethnic group and by age group. You can also fill in the numbers for your Online Audience here.

» Statistics D—This tab allows you to fill in information about your giving. To select what accounts from your finance module should be considered in each field, click the button with the checkmarks and lines next to each field to pick which accounts should be considered. If a field has a white background, then you will need to fill in the field manually

1. Select Reports within the Membership Module
2. Select the "Statistics: Denomination-specific" option on the list of reports
3. In the "Denomination" field, select "Annual Church Ministries" and then click the "Select" button

4. Set your reporting year in the Church Info tab, as well as fill in question 16, "Church is mostly"
5. In the Statistics A tab, select which events should be considered for each service and holiday. If a field has a white background, you will need to fill in that statistic manually
6. In the Statistics B tab, fill in any fields with a white background, and select what events should be considered in the "Average attendance of converts" field
7. In the Statistics C tab, review the data, and fill in the "Online audience" field with the appropriate number
8. In the Statistics D tab, select which accounts from your finance accounts should be considered for the various fields, and fill in any fields in white with the appropriate information.
9. Click Save and Calculate when finished to update your report with the calculations based on the fields you filled in.



# LCMS Youth List

Each year the Lutheran Church—Missouri Synod (LCMS) Office of Rosters and Statistics compiles a list of youth from each congregation who are aged 5 to 17–1/2, and their anticipated year of graduation from high school.

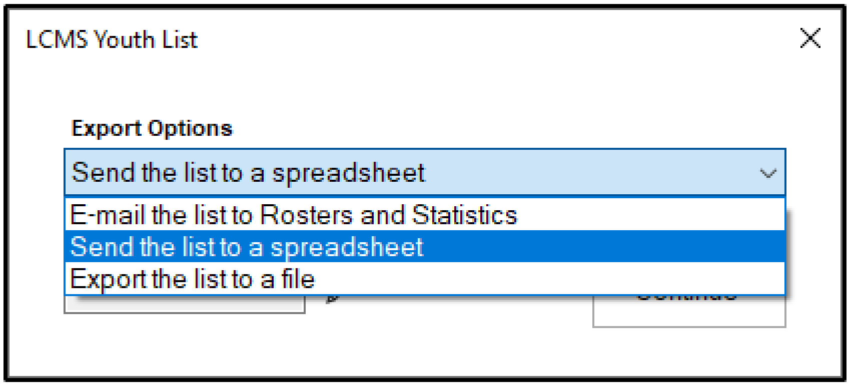
This list can now automatically be compiled and emailed directly to the Office of Rosters and Statistics, though this requires a password and the ability to send out emails from Shepherd's Staff.

This password is unique to your church, and if you are unsure of what your password is, please call software support at 1-800-346-6120, Monday-Friday 7:30AM to 5:00PM Central Time.

Note: Your Denomination must be set to LCMS in the Denomination field within the Church tab of the program settings menu. For more information on accessing this menu, see this article.

To access the LCMS Youth List:

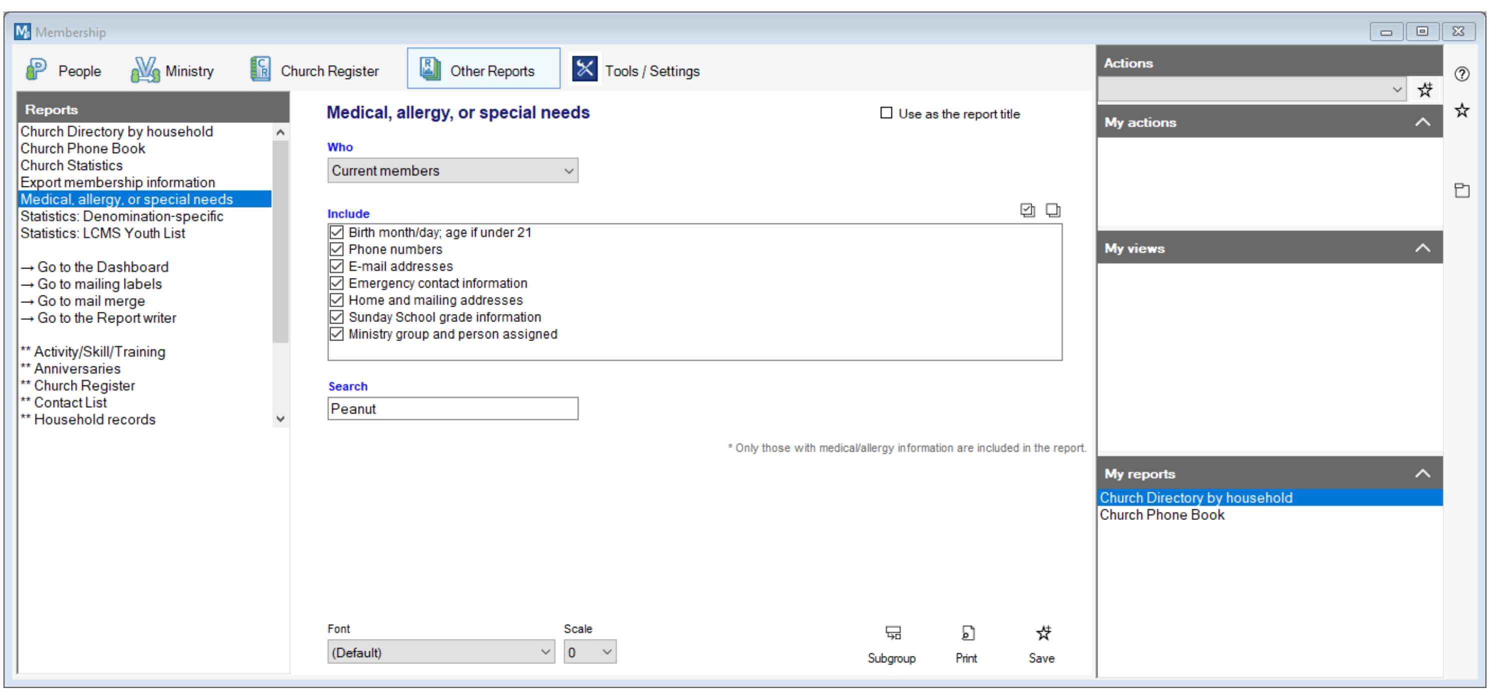
1. Open the Membership Module, and then click on Other Reports
2. Click on Statistics: LCMS Youth List
3. In the window that appears, choose what option you want to use for your export in the "Export Options" field.
    - The "Send the list to a spreadsheet" option will send your Youth List to your spreadsheet software, typically Microsoft Excel.
    - The "Export the list to a file" option will send your Youth List to a txt file.
    - The "E-mail the list to Rosters and Statistics" option will allow you to send your list directly to the office of Rosters and Statistics.
4. If you chose the "Send the list to a spreadsheet" option, or "Export the list to a file" and click continue, you will then be asked to select where on your computer you'd like to save the spreadsheet/file.
5. If you chose "E-mail the list to Rosters and Statistics" you'll need to fill in your church's password in the Password field. Click the pencil icon to the right of the field, and then type in your church's password and then click the save icon. Click the trash can icon to erase your password if you need to re-enter it. When finished entering your password click Continue.


LCMS Youth List
Export Options
Send the list to a spreadsheet
E-mail the list to Rosters and Statistics
Send the list to a spreadsheet
Export the list to a file

# Medical, allergy or special needs

The Medical, allergy or special needs report provides a listing of those who have information filled out in the "Medical/Allergies" field located in the "Other" tab of an individual's record. This report can help provide you with a listing of medical information that you may need to be aware of to best serve your congregation.

1. In the "Who" field, select what group of people you'd like to run this report for. You can select from everyone, a select group of people, a subgroup or even everyone in Sunday school.
2. In the include section you can select what kind of additional information, on top of what appears in the "Medical/Allergies" field for each person and this can include phone numbers, email addresses and emergency contact information.
3. The Search box will allow you to search for a particular word within people's Medical/Allergies field. Be careful about how you enter your search terms into this field. For example, if someone has a peanut allergy, and it was recorded as "Peanut Allergy" or "Peanut" in the Medical/Allergies field, typing in "Peanuts" to this field will not find that person, but if you type in "Peanut" into the search field, it would find the person who had "Peanut Allergy" and the person who has "Peanuts" filled into their Medical/Allergies field.
4. If you'd like to make a static subgroup of the people you find in this report, click the "Subgroup" button.
5. Click the print button to get a preview of your report. At the preview window, you can then click print to Print the report out.



# Export Membership Information

The Export Membership Information report allows you to export information about the people and households in your Membership module in various formats, such as excel or CSV. This report can even be used to export to information to various third-party services, such as Mailchimp or Lifetouch.

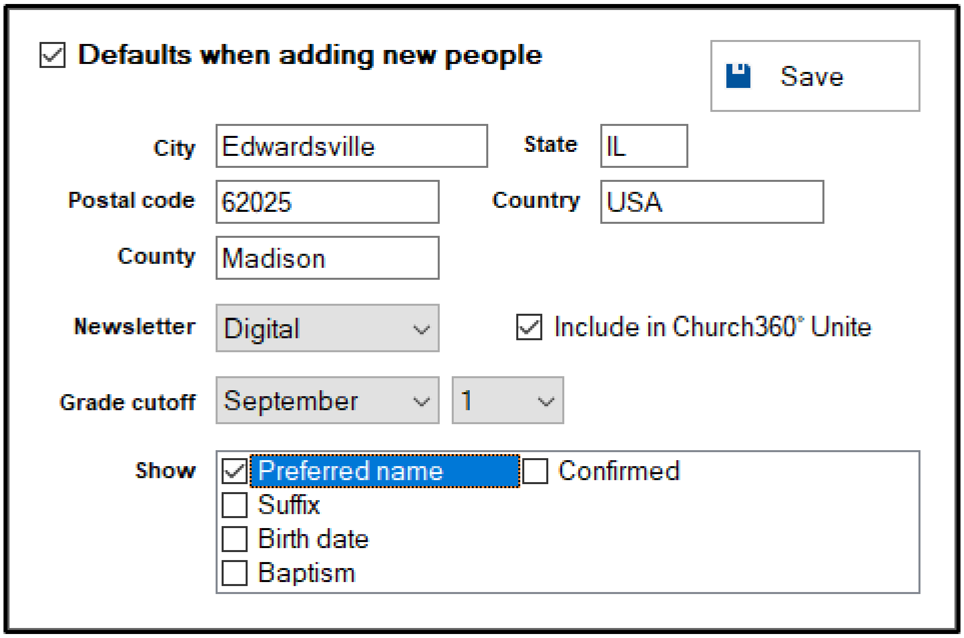
1. To access the Export Membership Information report, in Membership, click on the "Other Reports" tab, and then select "Export Membership Information"
2. In the "Who" field, select what group of people or households you want to perform this export for.
3. The format field offers a variety of different formats you can export to. These formats include:
    - Comma-separated values, style 1 - This will export to a Text or CSV file, and will include each household in your selected group, one household per row. You will be able to see the following fields: Last Name, Husband & Wife, Children, Street Address, City, State, Zip, Phone, Cell Phone 1, Cell Phone 2, Email 1, and Email 2.
    - Comma-separated values, style 2 - This is similar to the previous report, but each person will get their own row. The following fields are included on this report: Family Name, Member Last Name, First Name, Middle Name, Birthday, Address 1, Address 2, City, State, Zip, Primary Home Phone, Email Address and Cell Phone
    - Household (all addresses) - This report exports in either Text or CSV formats. This report will show each household in the selected group, each getting their own row. The following fields are included on this report: Household Name, Category, Addressee Style 1, Addressee Style 2, Street Address 1, Street Address 2, Street Address 3, City, State, Zip, Delivery Point, Country, Phone, Begin Date and End Date.
    - Lifetouch Import/Export - This option will bring up a new window and it will ask if you want to import data into Shepherd's Staff from Lifetouch, or Export information out from Shepherd's Staff to Lifetouch.
    - Mailchimp compatible - This option will provide you with a CSV file that is formatted to be exported into Mailchimp. This file contains one row per person, and it contains the following fields: Email address, First Name, Last Name
    - BatchGeo compatible - This option exports a TXT file in a format that can be imported into BatchGeo, an online mapping service. When exported, a Text file will appear onscreen that you can copy and paste into BatchGeo. It includes the following fields: Address, City, State, Zip, Name and Phone Number

- Cell Phone export - This exports each person's cell phone information to a TXT file. The fields included are First Name, Last Name, Cell Phone, Carrier and Description.

# Person/Household Record Defaults

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

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


Defaults when adding new people
Save
City
Edwardsville
State
IL
Postal code
62025
Country
USA
County
Madison
Newsletter
Digital
Include in Church360° Unite
Grade cutoff
September
1
Show
Preferred name
Confirmed
Suffix
Birth date
Baptism

# Combine Duplicate Person Information

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

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

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

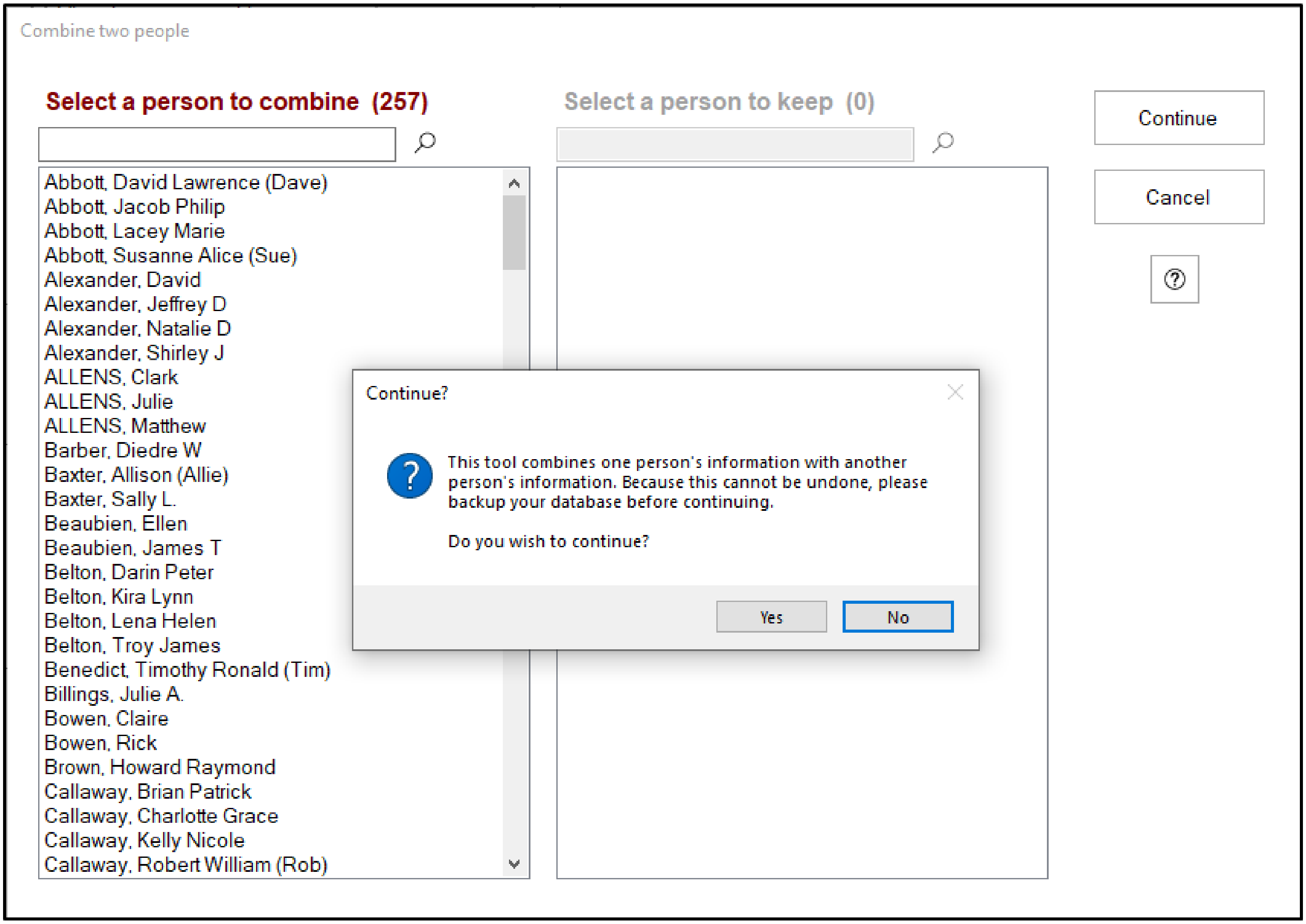
The person you select in the field under “Select a person to combine” is the person whose record will be deleted. All people will automatically appear in the field under “Select a person to keep”. If you select someone with contribution records, after you click “OK” a notice will appear stating that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

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

Here is how to combine two people:

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

10. Click “OK” to close the window.



# Change Field Names

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

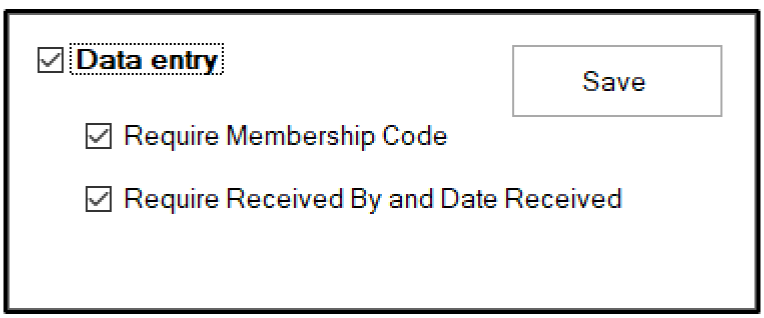
1. Log in to Shepherd's Staff as someone that has full supervisor level control to all modules. The SYSADMIN account is common to every Shepherd's Staff install and has full supervisor access to all modules.
2. In the Membership module, click on "Tools/settings"
3. Check the box for Customize field names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

# Data Entry Settings

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

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

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



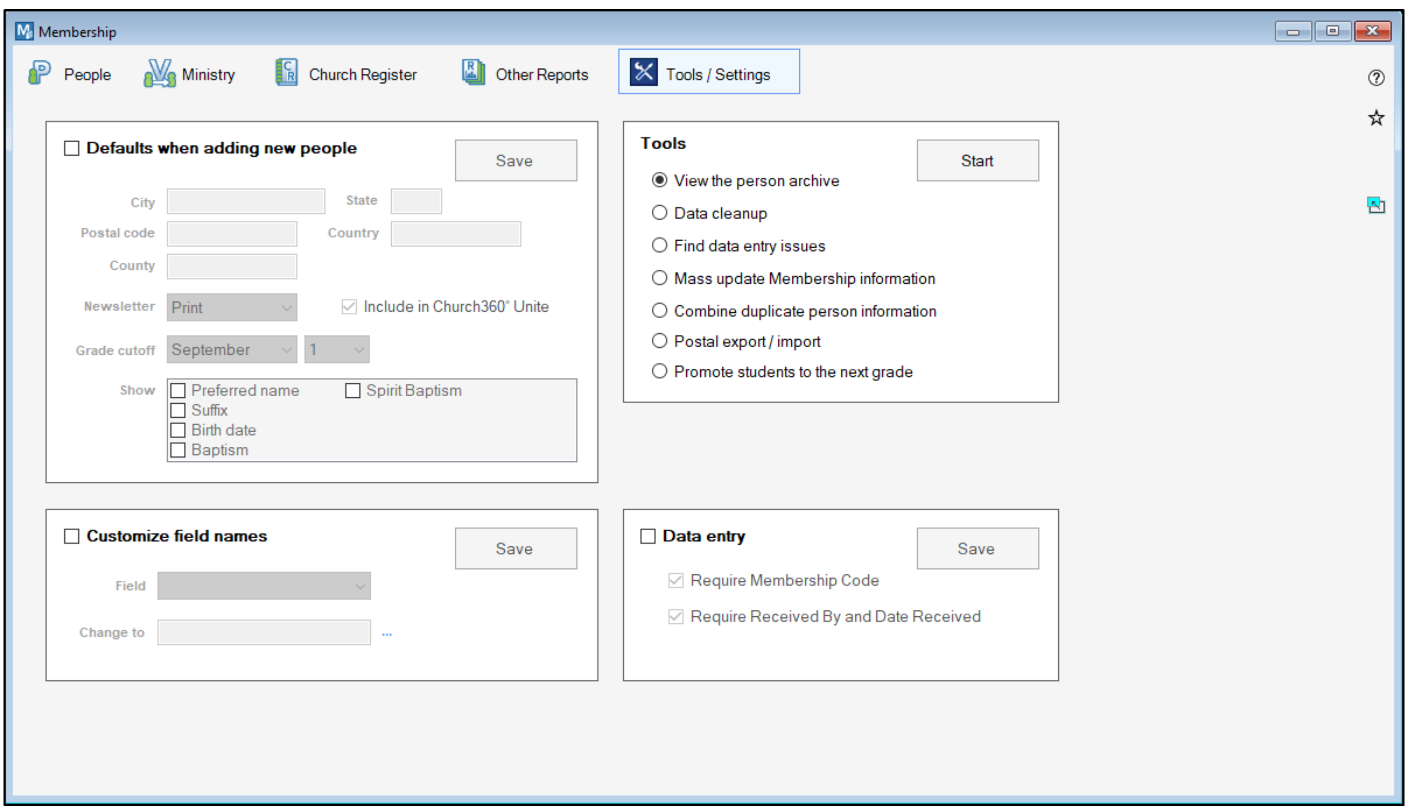
# View the Person Archive

The Person Archive is where you can see any person you have deleted from the individual grid. This view gives you the opportunity to review who these people are, and if needed restore them back to your records, or permanently delete them. If you intend to permanently delete anyone from this view, it is strongly recommended that you make a backup first, as you will otherwise not be able to recover the person who was deleted.

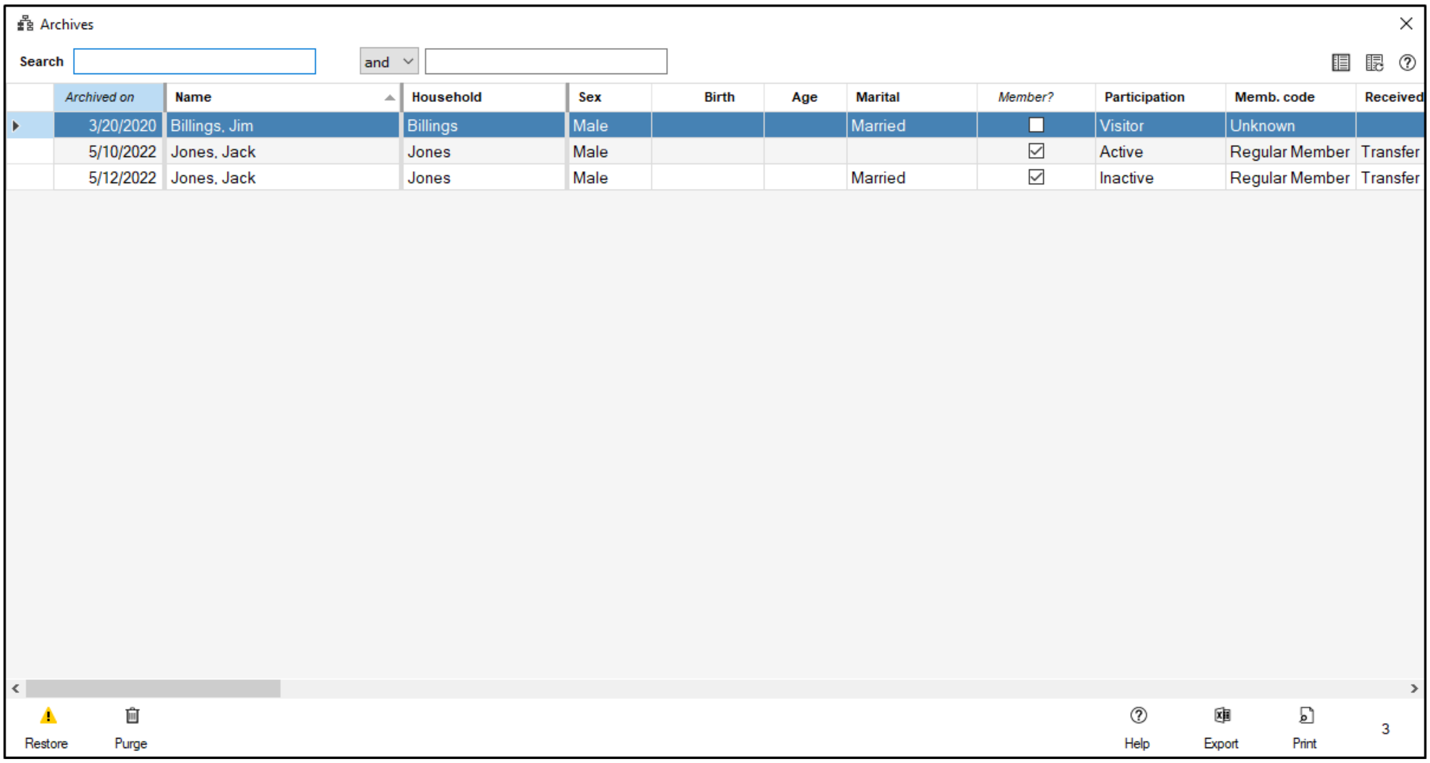
Note: In order to delete people from the Individual grid, the person record in question must not have any attendance records or an envelope attached. If they do, you'll first need to remove these records from this person.

After you make your backup,

- Go into Membership
- Go to the Tools/Settings Tab
- Select "View the person archive" option in the Tools menu, and then click "Start"



This will open the archive view, where you can see each record that has been placed in the archive. You'll be able to either restore or purge the records from here by using the "Restore" or "Purge" buttons at the bottom left corner of the window. The Restore option will bring the record back into your person records and will restore that record to the household they were in prior to being archived, with all their information intact. The Purge option will totally delete the person record from Shepherd's Staff. Deleted person records cannot be recovered without restoring a backup. You will also be able to export a list of all the archived records to Excel using the "Export" button or print a listing of the records using the "Print" button.



# Data Cleanup

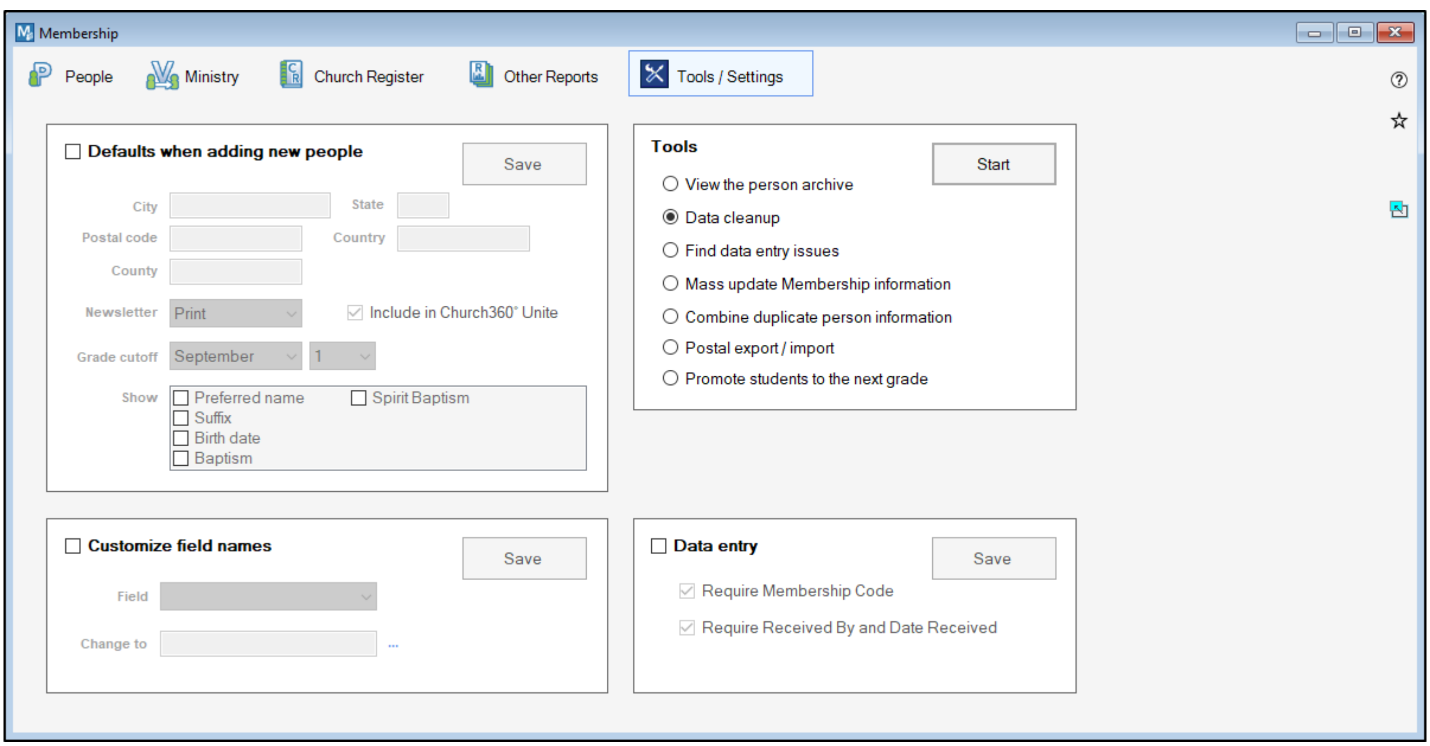
The Clean-up Utility is used to permanently remove person records from your database. After doing this, ALL the past membership, attendance, and contribution records for these people will be permanently deleted from the database.

It is recommended that you keep at least five years' data in the system.

As with all utilities, it is recommended you create a backup just in case you delete something you don't want to.

After making the backup,

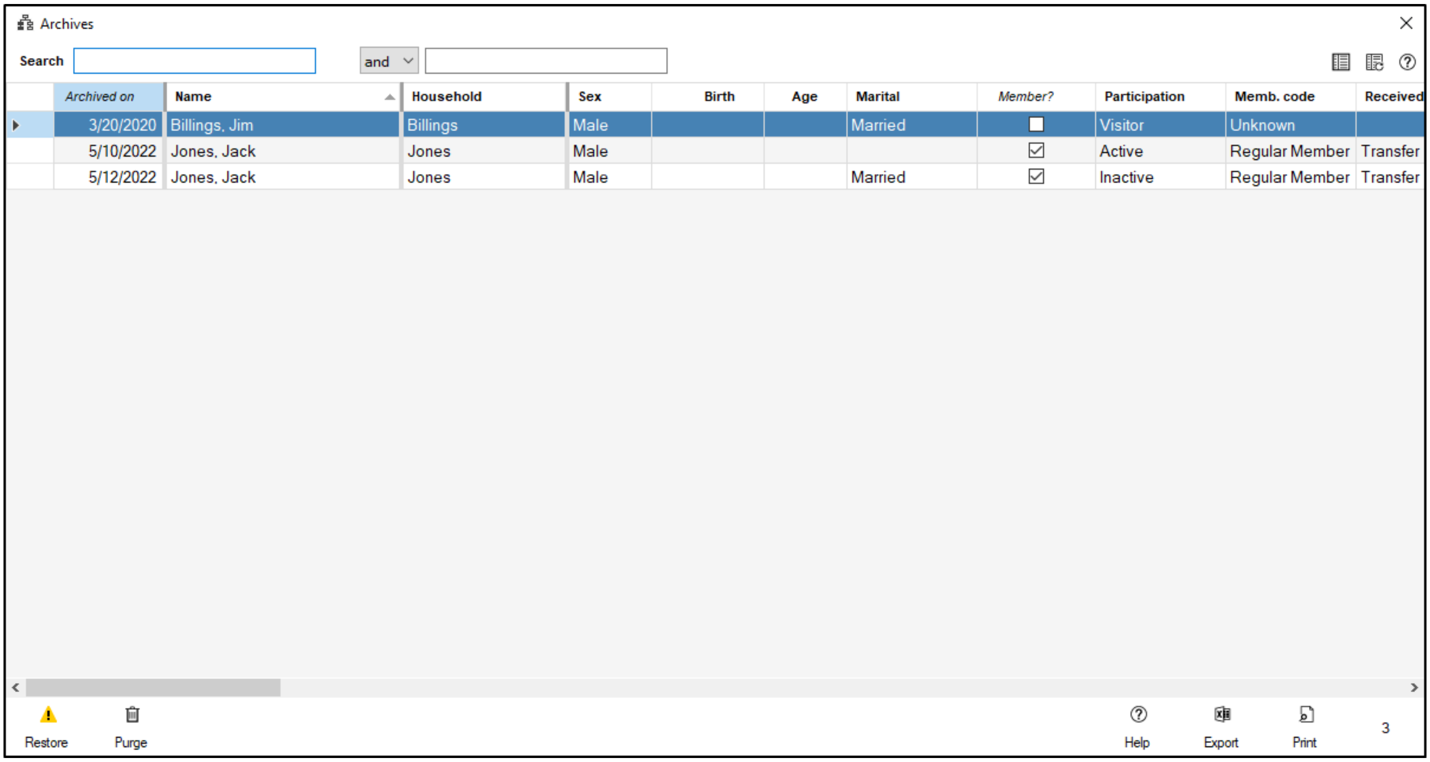
- Go into Membership
- Go to the Tools / Settings tab
- Click Data cleanup. If there isn't an option for data cleanup, go back to the main menu and make sure you are on the most updated version of 8.8. You can go to the Utilities menu to check for software updates.




- In the window, select the criteria for those you want to permanently remove. You can choose a specific removal reason like death or inactivity as well as choose the date range for their removal.

Note: It is not recommended to delete members who have been removed in the last few years, as their deletion may affect year-end congregational reports.

- Click Next and review the list shown. You can export or print a list of their information for record keeping.
- If everyone listed is approved to be deleted, click Continue and choose Yes to permanently delete the membership, attendance and contribution records for those listed.



# Promote Students

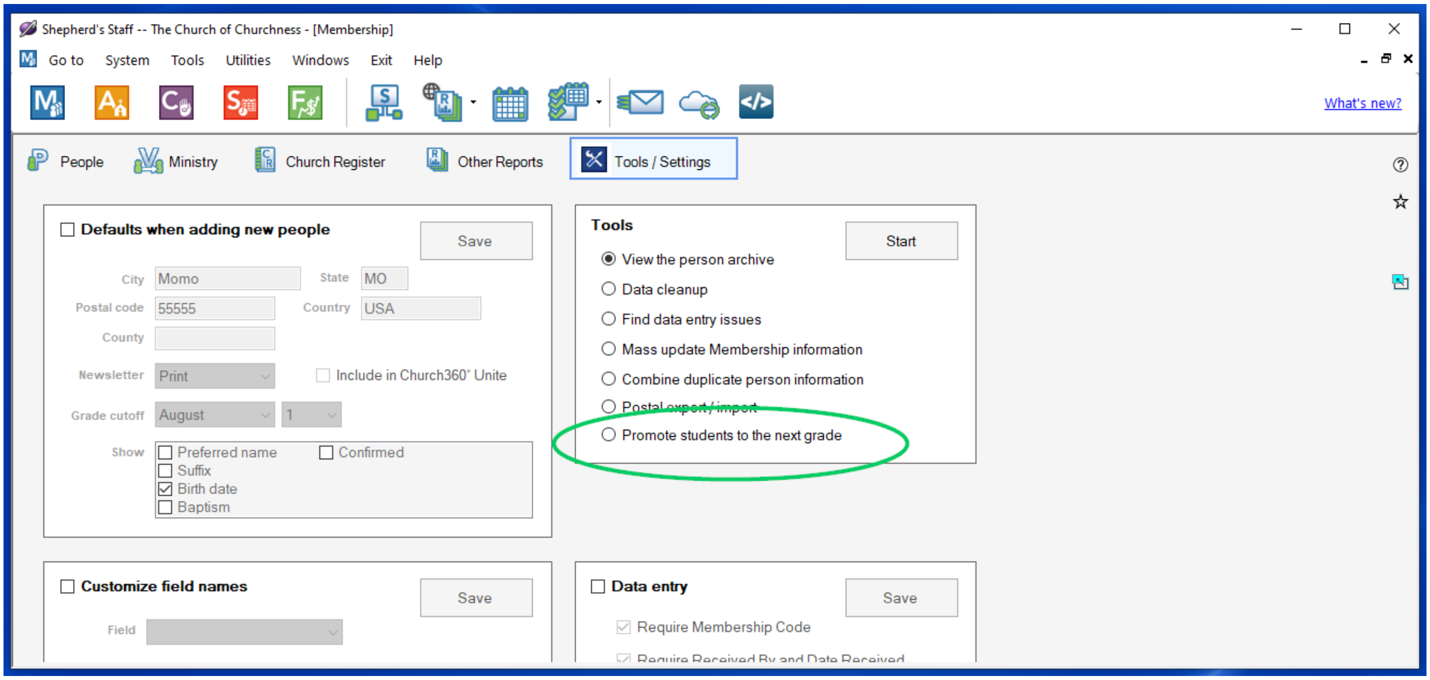
At the end of the school year, you normally promote students to the next grade level in school and Sunday School. Instead of doing this person by person, you can mass promote students using the Promote Students utility. The Promote Students utility only works with the default grades that ship with Membership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

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

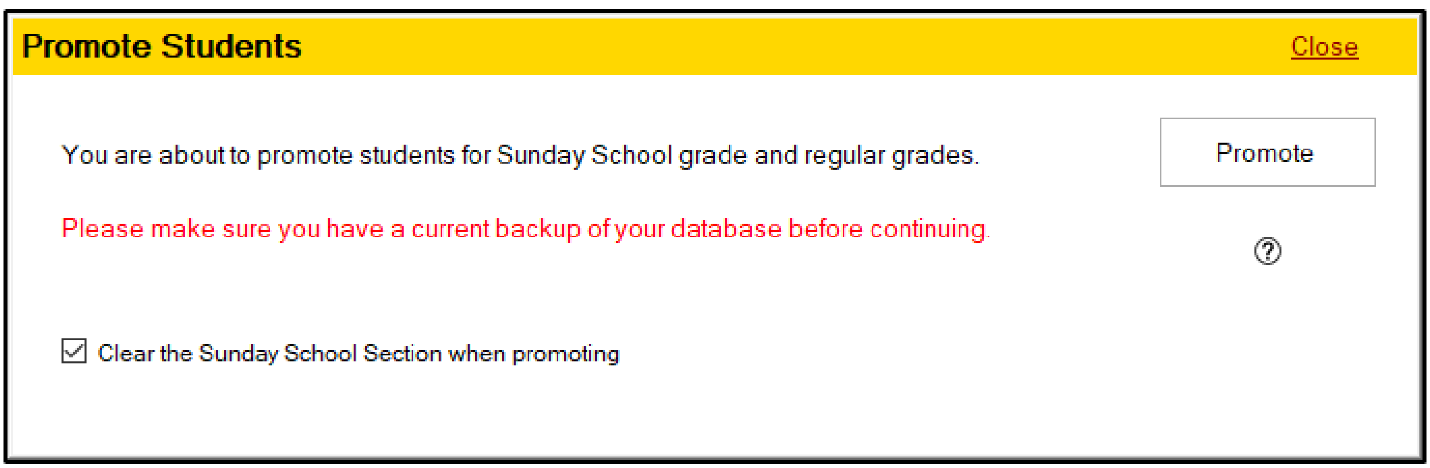
» Clear the Sunday School Section when Promoting—When you assign your Sunday School grades, there is an option to assign a section for each grade; this is to accommodate large grades which may be split into multiple classes. For example, a church may have 42 pupils in its Kindergarten grade and decide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

To promote students follow these steps:

1. Make a backup. The changes made by this utility are difficult to reverse.
2. After making a backup, in the Membership module, click on Tools/Settings, and in the Tools section, choose "Promote students to the next grade" and click "Start"



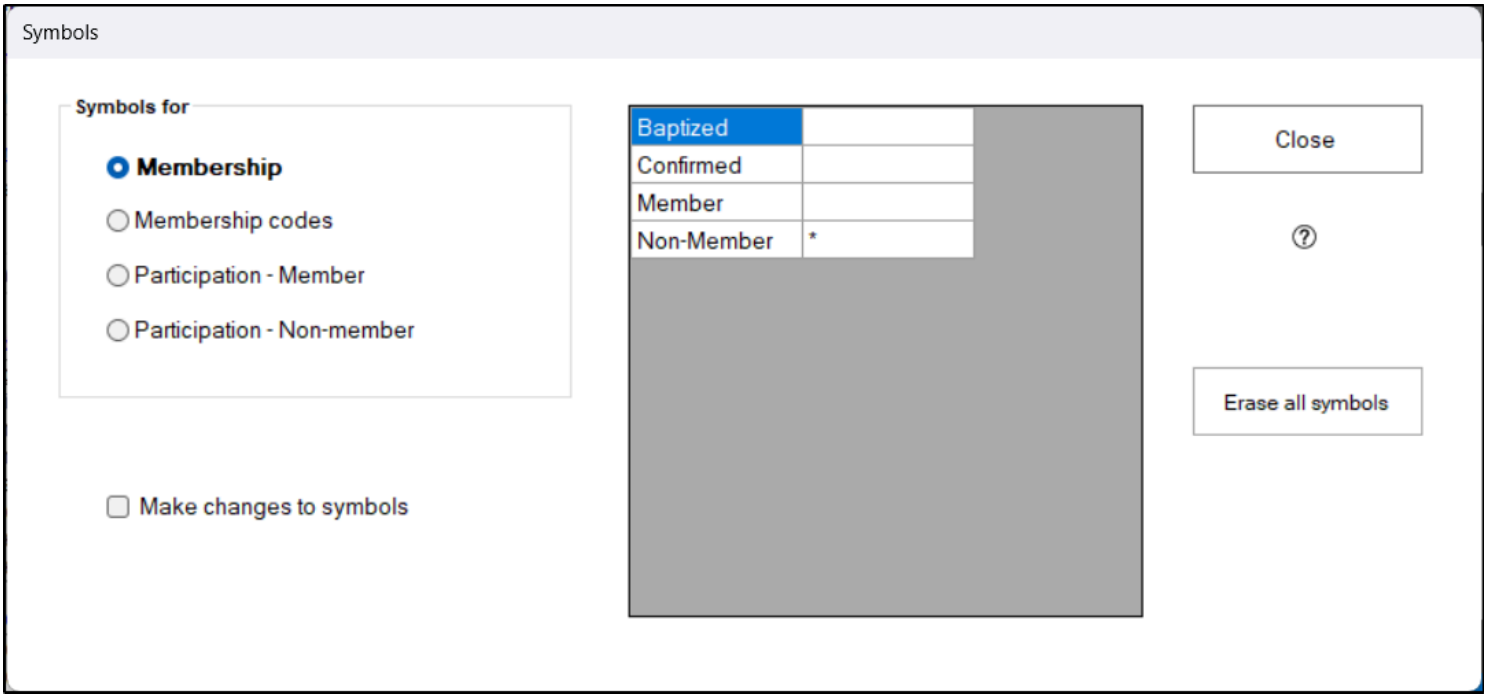

- Select if you want to clear the Sunday School Section when you promote your students by checking the box for "Clear the Sunday School Section" when promoting.
- Click Promote. You will be asked to confirm you want to promote your students. Click Yes to confirm, and then you will be shown a window that lets you know how many students were promoted.



# Church Directory Symbols

When building your church directory, adding symbols to designate different designations among the people in your directory can be a helpful tool to provide additional information to the reader. Shepherd's Staff allows you to add symbols for a variety of different designations for the people on your directory, and the steps to do so are outlined below:

1. In Membership, click on "Other Reports", and select "Church Directory by household", if it is not already selected.
2. Near the bottom of the report window, you will see a button labeled "Symbols" with an * on it. Click this button
3. This will open the "Symbols" window. You will see a section labeled "Symbols for", and inside you will find four different selections. Select the option you want to work with by clicking the button next to that option:
    - Membership - These options pertain to a person's membership status at your church, including information for baptism, confirmation, and if a person is a Member or Non-member
    - Membership codes - These options pertain to the various membership codes your church may use, to describe what kind of member a person is. Options may vary depending on your church's denomination.
    - Participation - Member - These options pertain to the participation field on a member's record. Each option you have in the participation field for members will be represented here.
    - Participation - Non-member - These options pertain to the participation field on a non-member's record. Each option you have in the participation field for non-members will be represented here.
4. To make changes to the options listed, make sure to check the "Make changes to symbol checkbox".
5. Each option listed can have a symbol on your directory. A symbol will be a single character. This can be a letter, number, or special character. Click the box next to the option you want to make changes to, and then type in the character you want to use.
6. If you want to clear out all the symbols across all areas of the church directory, click the "Erase all symbols" button.
7. Click "Close" when you are finished making changes to your symbols.


Symbols
Symbols for
Membership
Membership codes
Participation - Member
Participation - Non-member
Make changes to symbols
Baptized
Confirmed
Member
Non-Member *
Close
Erase all symbols