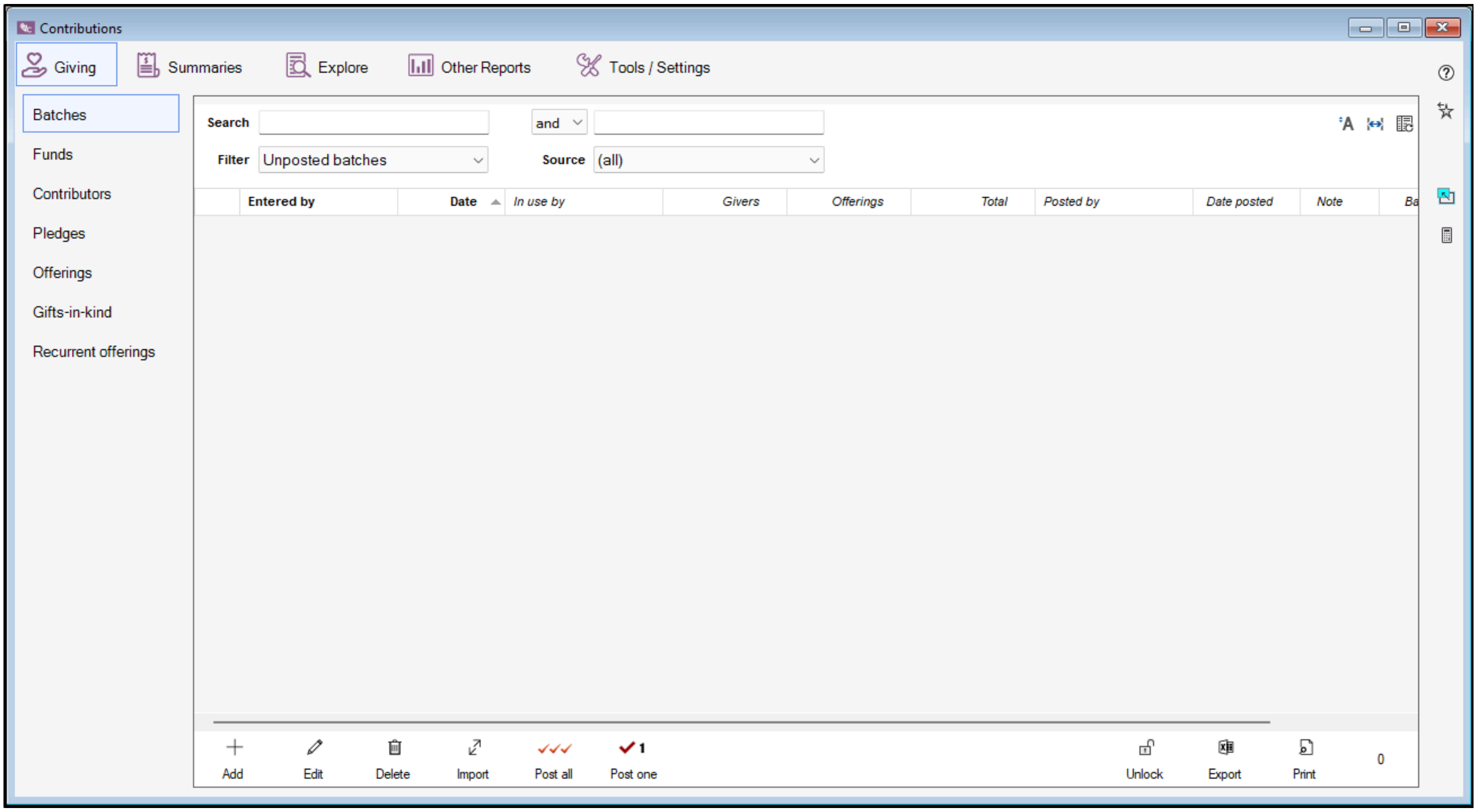
Shepherd's Staff

Contributions Manual

Introduction to Contributions Module

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



Batches

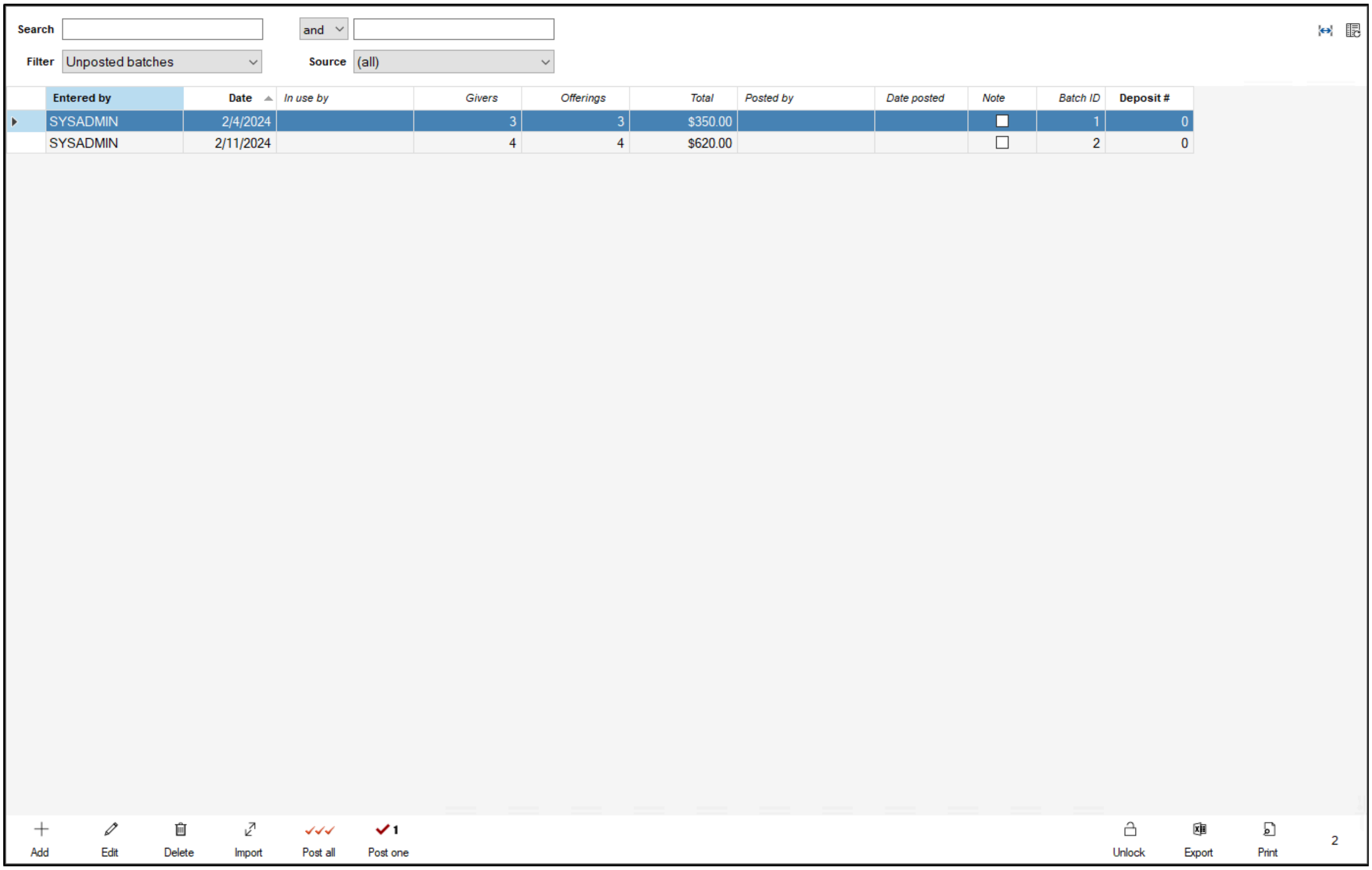
The Batch utility in the Contributions module of Shepherd's Staff allows you to enter multiple offerings quickly, compartmentalize workflow, and even work from home.

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

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

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

1. To access the batches window, click on the "Giving" tab, and then click on "Batches". Any batches that have yet to be posted will be shown on the offering screen. You can switch between posted and unposted batches in the "Filter" box.
2. To add an offering batch, click the "Add" button at the bottom of the window, and in the window that appears, set the date of the offering batch and click "Continue" to start working with your offering batch.
3. To edit an offering batch, click on the offering batch you want to make changes to and click "Edit." (Only unposted batches can be edited)
4. To delete an offering batch click on the offering batch you want to delete and click "Delete".
5. Clicking "Print" will provide you with a variety of reports for your batches, including individual batch reports, with and without names, checklists both with and without giver names, sorted by envelope number or entry order, a batch summary report and a list of batches report.



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

Batch Entry

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

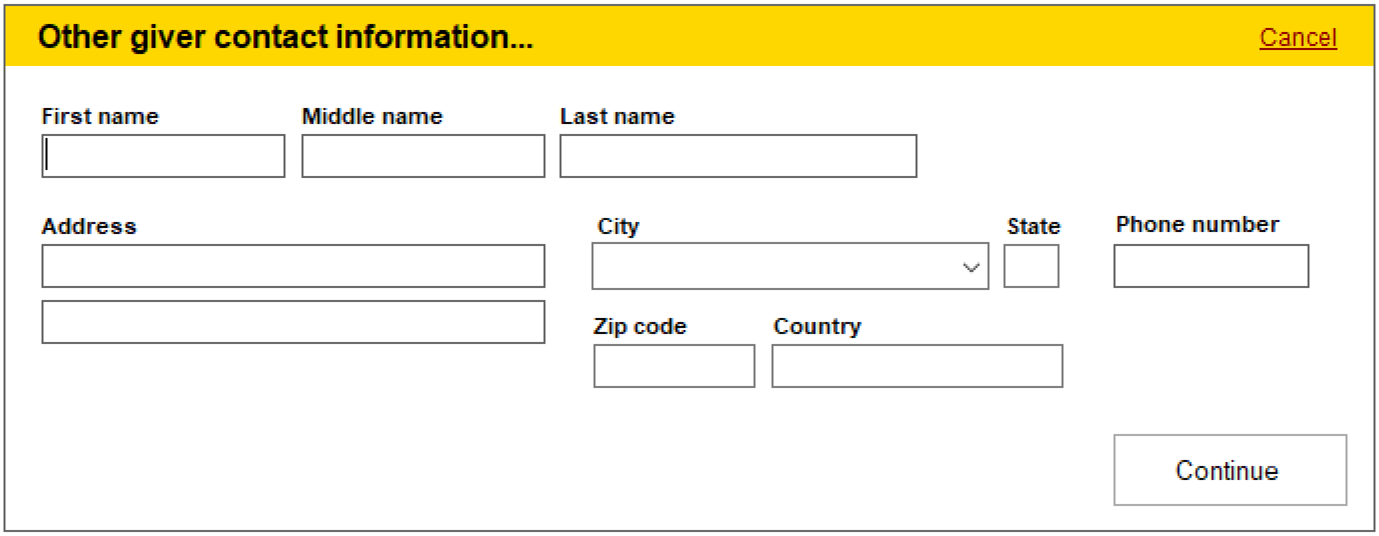
When you add a batch, you'll first select what date your offering batch is for, and then click the "Continue" button to go into the offering batch. On the batch entry window, if you realized you selected the wrong date, click on the pencil icon to the left of where the date is listed, and you can change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

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

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

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

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



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

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

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

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

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

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

1. Make sure that the Date is correct.
2. Check the boxes you want to use. In this case we are checking “Hide Special Description” and “Hide Check number.”
3. The Envelope Number can either be typed in or selected from the drop list. Press ENTER or TAB on your keyboard.

4. Type in the fund or select it from the drop list. Press ENTER or TAB on your keyboard.
5. Type in the amount of the offering. You do not need to enter the $ sign. If it's a whole dollar amount for the offering like 20, you don't need to enter a decimal. Press ENTER or TAB on your keyboard to move to the next row.
6. Once you are done entering in the Batch, you may want to click the "Batch Totals" button to see a summary of your current Batch.
7. Now that the Batch is complete, click 'Save' and then the red "X" to close the window.
8. Our next step is to post the Batch.

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

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

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

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

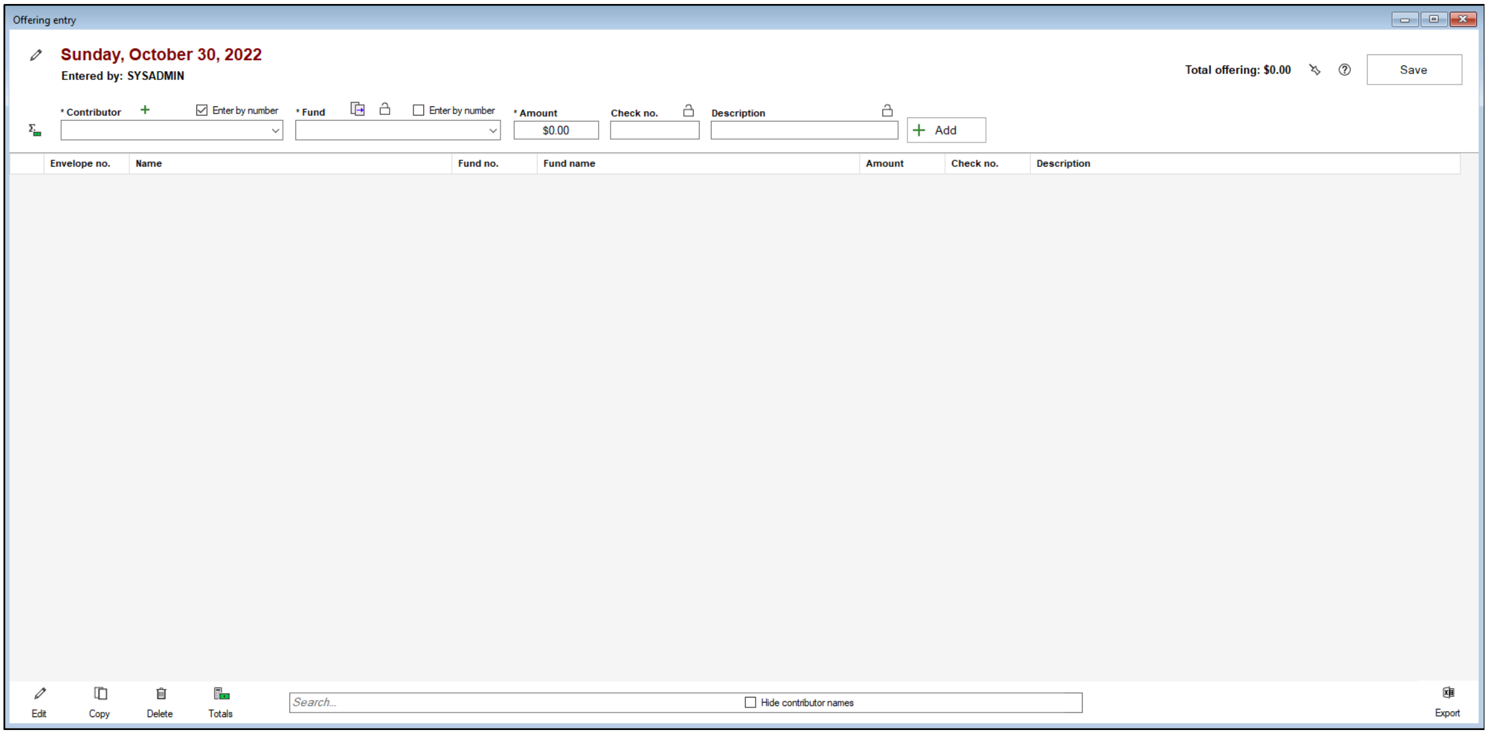
» Create a Deposit in Finance—This option will create a deposit in Finance based on the funds in the Batch and what finance accounts those fund records are attached to.

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

6. Answer any verification questions that come up to continue.

7. You will receive a message saying the post was successful.

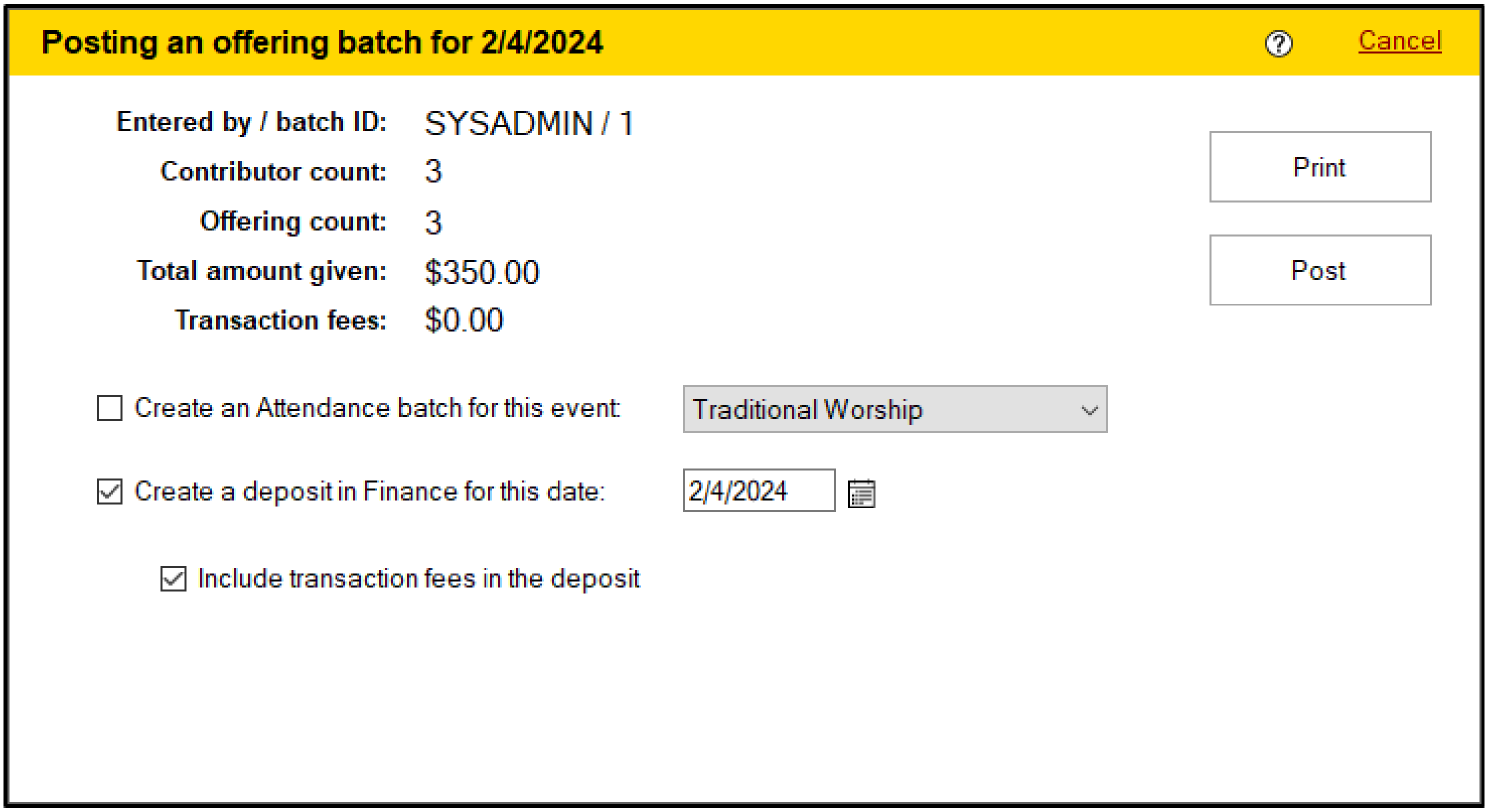
8. After Posting, the Batch disappears and the lines become permanent Offering records.



Batch Posting

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

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



Shepherds Staff will also allow you to post all your unposted offering batches all once:

1. In the Contributions module, go to Giving>Batches.
2. Click the "Post All" button at the bottom of the grid.
3. The "Post multiple offering batches" window will appear. This window will show you a grid of all your unposted offering batches.
4. Click the "Print" button, and you will be taken to a preview screen that will provide you with an Offering Batch Posting Report for each offering batch you have in the grid.
5. Click the "Continue" button to proceed with posting all batches in this window. At the window that appears, click the "Yes" button to confirm you want to post your batches.

Post multiple offering batches

? Cancel

You are about to post ALL of the following batches.

* Deposits will automatically be created in Finance using the batch date.

Print | Continue

Batch ID	Entered by	Date	*Givers*	*Offerings*	*Total*	*Trx. fees*
1	SYSADMIN	2/4/2024	3	3	$350.00	$0.00
2	SYSADMIN	2/11/2024	4	4	$620.00	$0.00

Recreating a Batch Report

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

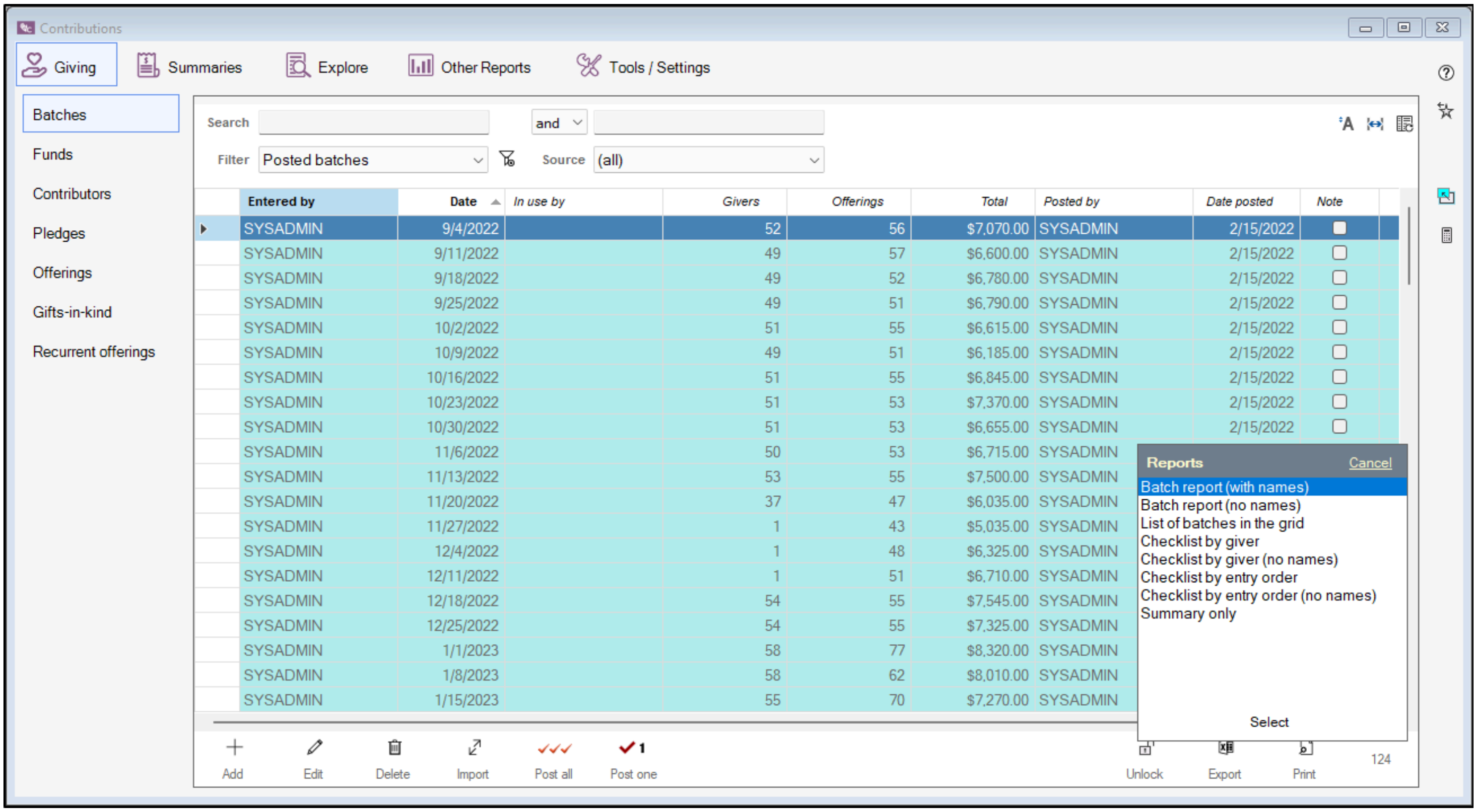
Note: Only batches posted in version 8.9 of Shepherd's Staff and onward will be included in the Posted Batches window.

Note: As of Shepherd's Staff 9.2, posted offering batches can be deleted from the Posted Batches view. This will delete the posted offerings that the batch created, as well as the batch itself. It will not delete a deposit created in the Finance module by posting an offering batch, however.

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

contributions. There will be a checkbox for each offering that you can use to check against your offering counters. This report is sorted by the order the offerings were entered into the batch.

- Checklist by entry order (no names) - This is the same as the previous report, except it does not show the names of the contributors, just their envelope numbers
- Summary only - This option only prints the final summary page of a batch report, showing how much money was received through different sources (Checks, Digital, Cash/other), amounts given by different types of contributors (Envelopes, Other givers, Anonymous) and the Fund and Deposit summary



Import/Export Shepherd's Staff Batches

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

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

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

Exporting Batches:

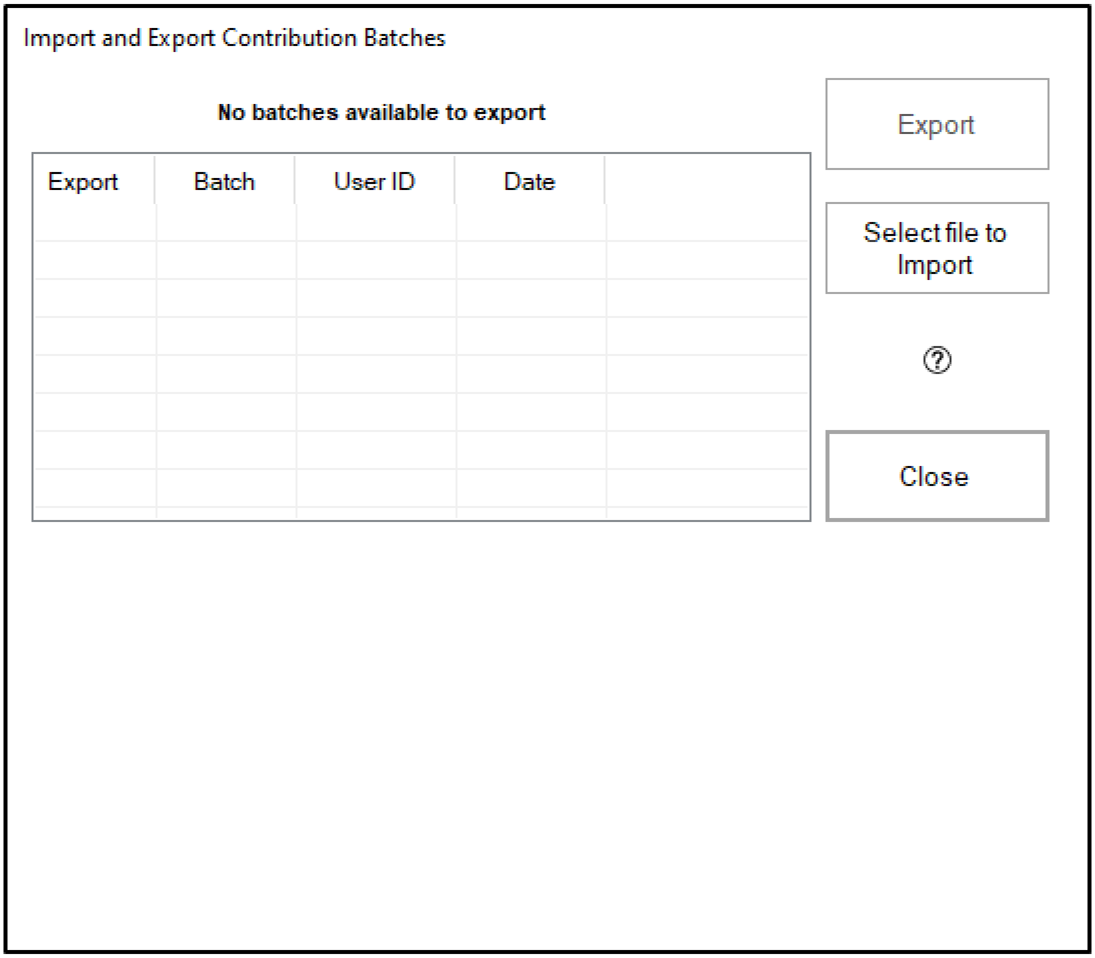
1. After you have created your offering batch(es), click the "Import" option at the bottom of the "Batches" grid and choose "Shepherd's Staff batch" and click "Select"
2. In the window that appears, all unposted offering batches will appear. Make sure only the offering batches you want to export to your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

Importing Batches:

1. Once you have received the import file on the computer that you want to import to, open the contributions module and go to Giving>Batches
2. Click the "Import" option at the bottom of the offering batch window and choose "Shepherd's Staff batch and click "Select"
3. Click the "Select file to Import" button
4. At the file explorer window that appears, find the batch file you received from the person who created the offering batches off-site, and double click it.

5. Each offering batch in the batch file will then appear in the "Import and Export Contribution Batches" window.

6. Click "Import" to bring these offering batches into your unposted batches. Click "Reset list for exporting" if you want to cancel out of the import, but stay in the "Import and Export Contribution Batches" window.



Import from other giving source

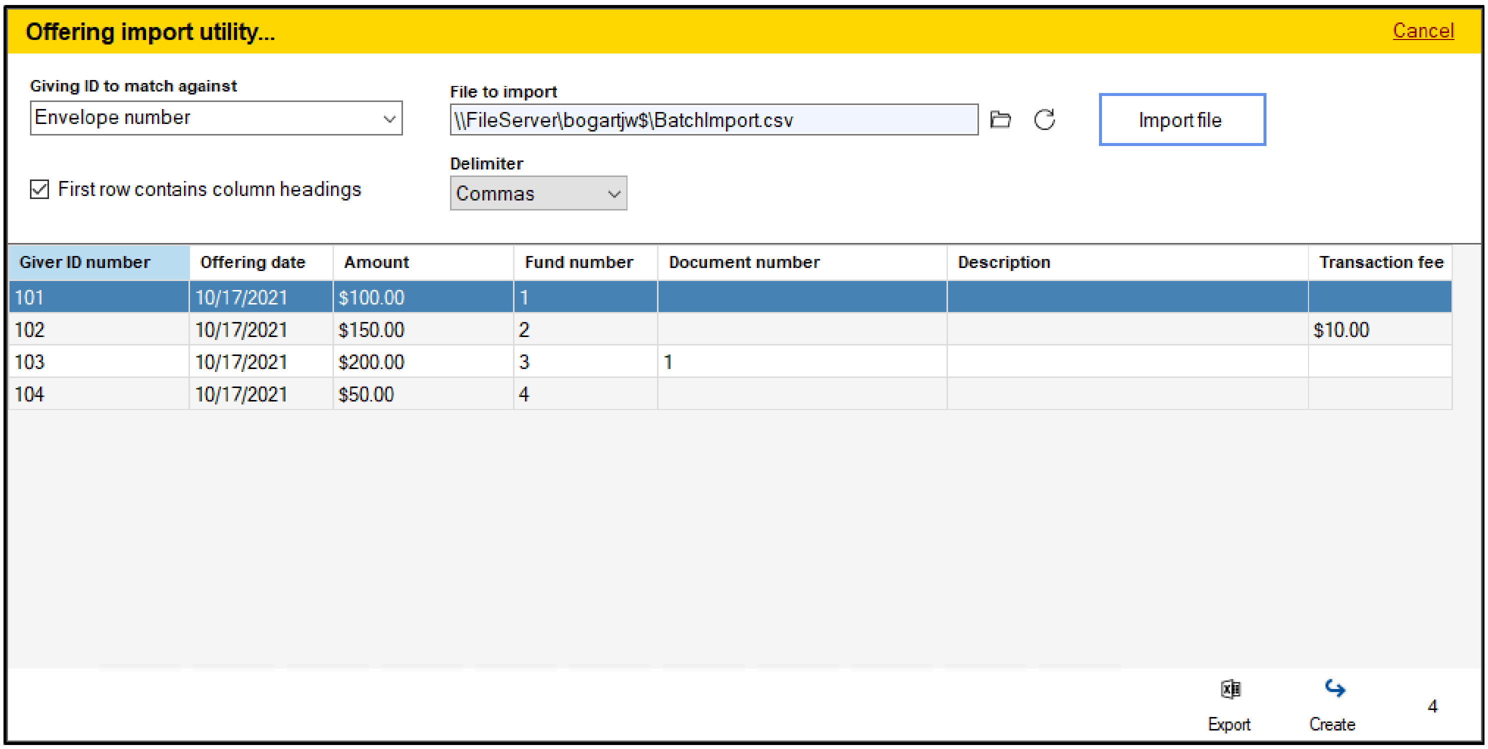
The Import from other giving source utility allows you to import offerings from a CSV or TXT file. This is useful if you use an e-giving platform other than Vanco, as this will give you an option to import your offerings from these services. The import files will need to be set up in either a CSV or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

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

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

your delimiter appropriately.

5. To the right of the "File to import" window, click the file folder icon to bring up the file explorer window. Navigate to where you have the file saved on your computer, and double click it to open the file.
6. Click the "Import file" button. This will attempt to bring your file into Shepherd's Staff. If successful, you will see your file appear in the bottom section of the import window. Otherwise, Shepherd's Staff will provide you with a message describing what may be causing your file to not import.
7. Click the "Create" button to let Shepherd's Staff create offering batches for each date you imported offerings for.



Import from Vanco

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

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

The import process also flags offerings that have problems preventing them from being posted to Contributions. Problems can include invalid fund numbers, unassigned Vanco giver IDs, failed or rejected credit cards, and refunds. Shepherd's Staff can take offerings that are assigned to Vanco IDs that are not matched up with a corresponding giver in Shepherd's Staff and assign them to an "Other Giver" record, as well as overriding a fund number from Vanco and associating it with a different fund number in the Contributions module.

The utility creates offering batches for the offerings that were given through Vanco. These batches can then be posted as any other batches could be in the Contributions module, however, they cannot be edited. Also, when you post an offering batch from Vanco, and it generates a deposit in the Finance module, the date on the deposit in finance will reflect the date the money was received in the bank account, while the date shown in the contributions module will be the date the contributor gave the offering. Also, the fees can be automatically deducted from offering batches posted to finance as deposits, with the pre-fees amount showing on givers' records, and the post-fees amounts showing on the deposit.

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

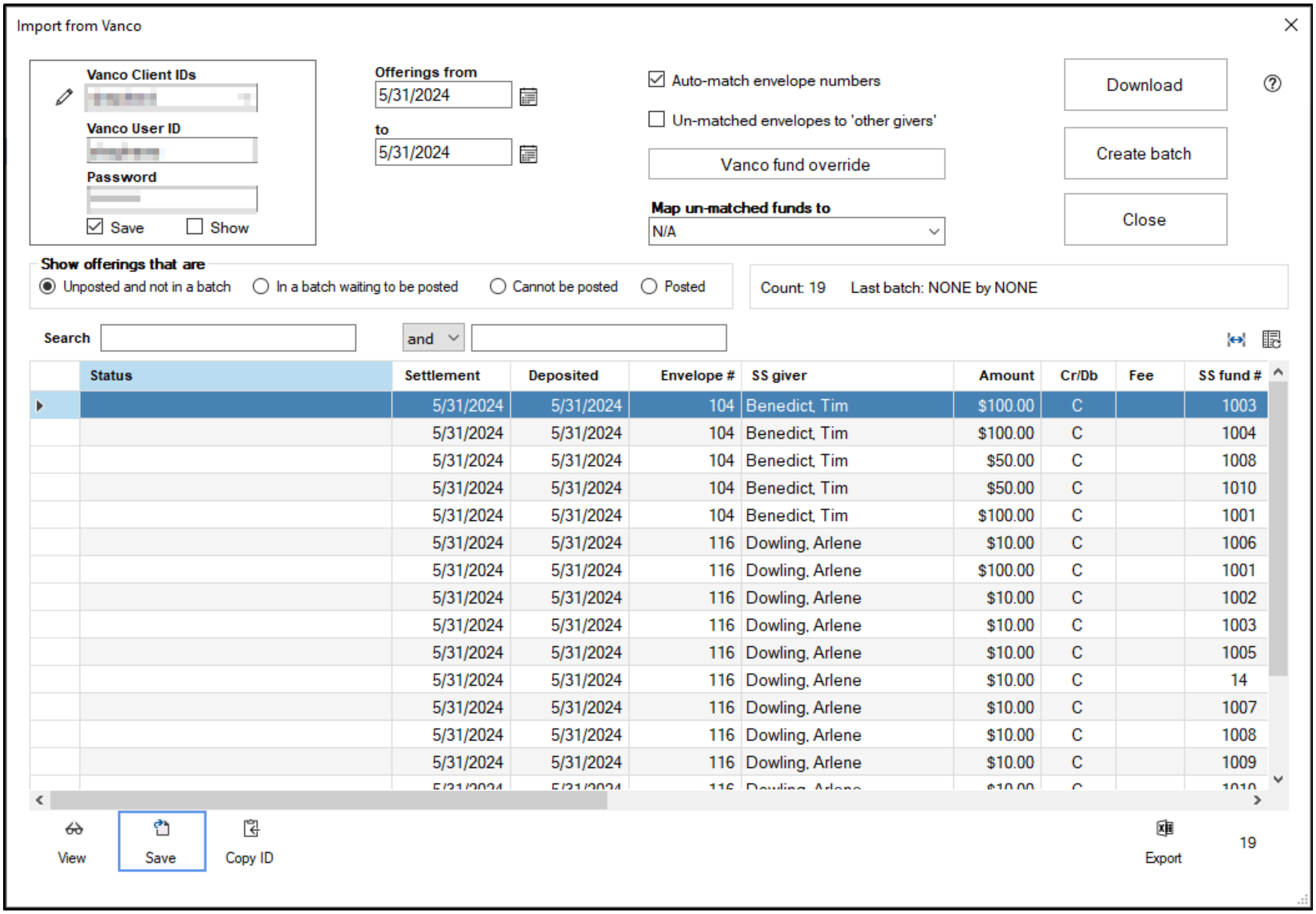
1. In the Contributions module, go to Giving>Batches
2. If you have not already put in your Vanco client ID information, click inside the "Vanco Client IDs" box and then click the pencil button to the left of the box that appears to start entering your Vanco credentials. This will include your Client ID, User ID (This is the Web Services User ID from Vanco, not your Vanco website login, you will need to request this specifically from Vanco) and Password. Click "Add" when finished, or if updating an existing Client ID, click the "Update" button instead. The "Save' checkbox will make sure it retains the selected Client ID for the next time you use the import utility, and the "Show" option will reveal your password, instead of obscuring it behind *'s.
3. In the "Offerings from" field, set the date range of contributions you want to download from Vanco. The maximum range is 180 days.

4. Make sure to have the "Auto-match envelope numbers box" checked so the utility can cross reference your Vanco ID's you entered on the contributors grid with the ID's being brought down from Vanco.
5. Checking the "Un-matched envelopes to 'other givers'" option will make it so any offerings that are associated with an un-matched giver in the "Status" column will be assigned to an "Other Giver" record.
6. Clicking the "Vanco fund override" button will allow you to pick one of the funds that imports from Vanco and map it to another fund in your contributions module. A grid will appear that has columns for the Vanco Fund Number, Shepherd's Staff Fund Number and Shepherd's Staff Fund name. If you double click on a row of this grid or click on the row and then click edit, a window will appear, and you can type in the Vanco fund number you want to map over to the fund you selected in that row. You can do this multiple times to have multiple funds from Vanco map to the same fund in Shepherd's Staff. Click the "Close" button at the bottom of the grid to close this grid and continue your import.
7. The "Map un-matched funds to" box will let you pick a "catch-all" fund to map all offerings to that don't have a matching fund number in Shepherd's Staff.
8. Click “Download”. After loading them in, this will show you all offerings given to Vanco during the time period. If there are any errors that need to be addressed for any of the offerings, they will appear in the status column.
9. Click “Create Batch” to create a batch for each date for the offerings that have not yet been posted or put into a batch.

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

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

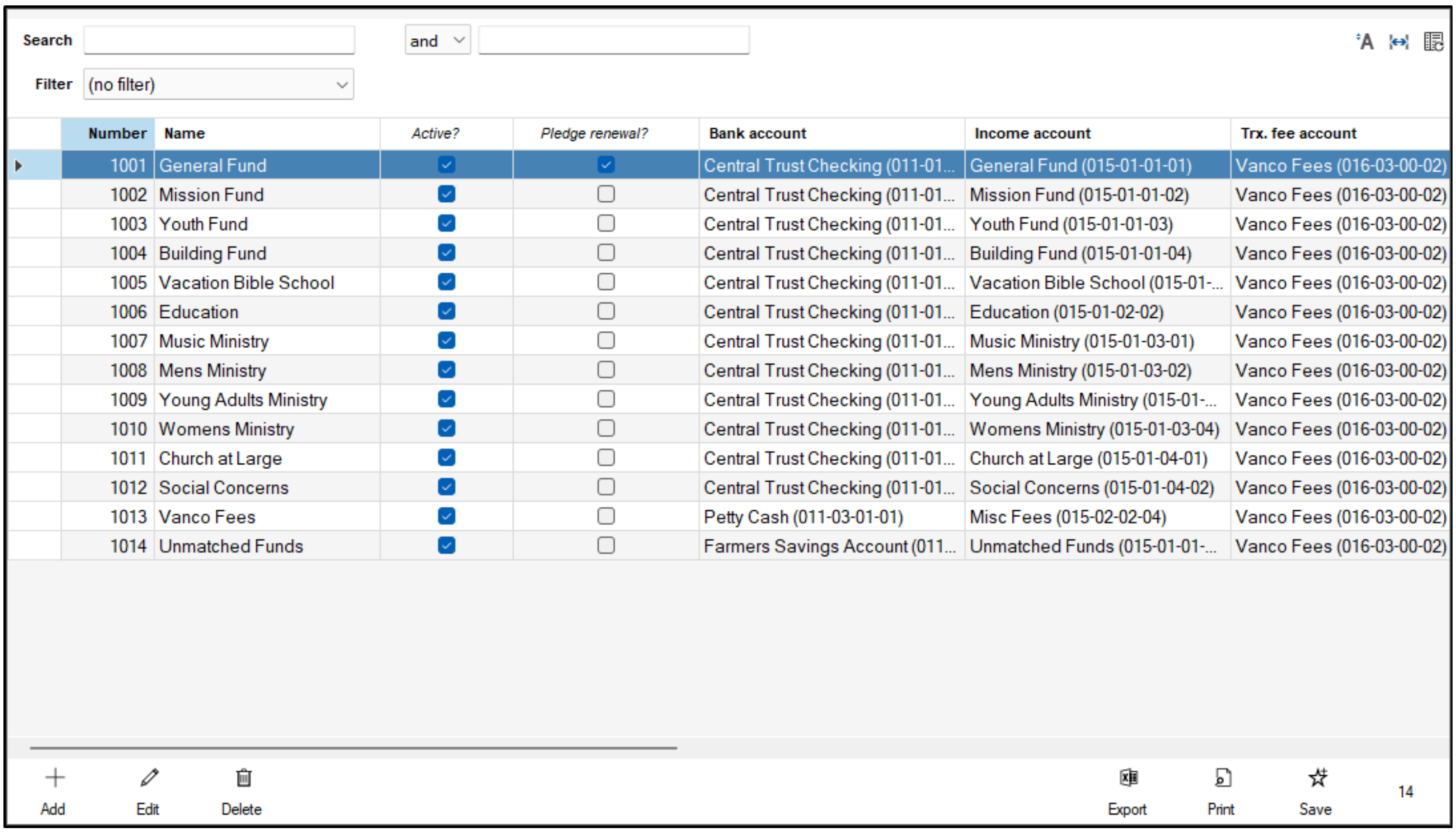
You can see the name of the giver in Vanco for an offering by clicking on that record in the grid and clicking the "View" button. Clicking the "Save" button will let you export "CSV" file of your offerings, and clicking "Copy ID" will copy the Vanco ID of the offering you have selected to your Windows clipboard so you can paste it in to a contributor's record. You can export all the offerings in the view that you have selected out to excel by clicking the "Export" option.



Funds

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

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



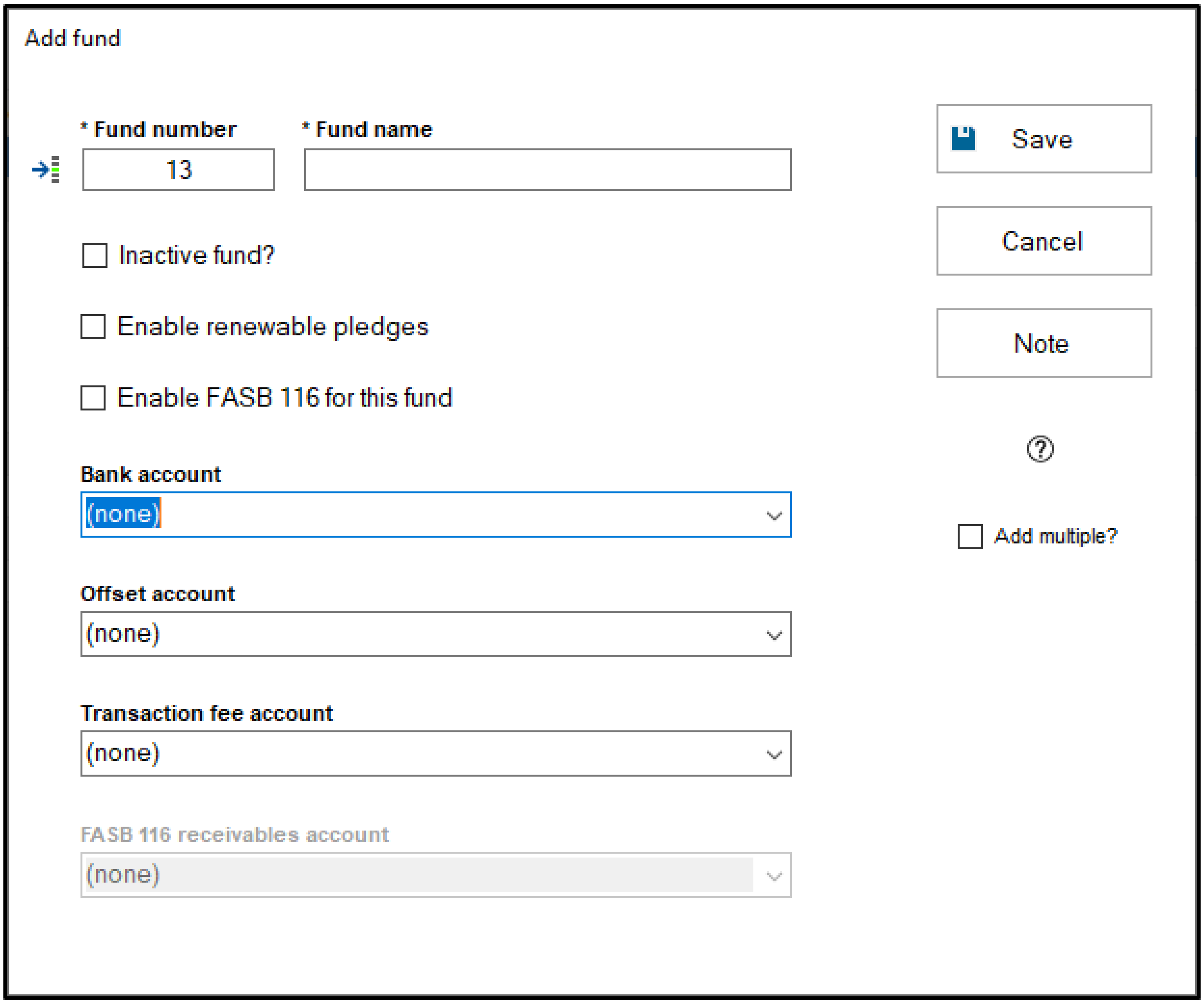
Number	Name	Active?	Pledge renewal?	Bank account	Income account	Trx. fee account
1001	General Fund	☑	☑	Central Trust Checking (011-01...	General Fund (015-01-01-01)	Vanco Fees (016-03-00-02)
1002	Mission Fund	☑	☐	Central Trust Checking (011-01...	Mission Fund (015-01-01-02)	Vanco Fees (016-03-00-02)
1003	Youth Fund	☑	☐	Central Trust Checking (011-01...	Youth Fund (015-01-01-03)	Vanco Fees (016-03-00-02)
1004	Building Fund	☑	☐	Central Trust Checking (011-01...	Building Fund (015-01-01-04)	Vanco Fees (016-03-00-02)
1005	Vacation Bible School	☑	☐	Central Trust Checking (011-01...	Vacation Bible School (015-01-...	Vanco Fees (016-03-00-02)
1006	Education	☑	☐	Central Trust Checking (011-01...	Education (015-01-02-02)	Vanco Fees (016-03-00-02)
1007	Music Ministry	☑	☐	Central Trust Checking (011-01...	Music Ministry (015-01-03-01)	Vanco Fees (016-03-00-02)
1008	Mens Ministry	☑	☐	Central Trust Checking (011-01...	Mens Ministry (015-01-03-02)	Vanco Fees (016-03-00-02)
1009	Young Adults Ministry	☑	☐	Central Trust Checking (011-01...	Young Adults Ministry (015-01-...	Vanco Fees (016-03-00-02)
1010	Womens Ministry	☑	☐	Central Trust Checking (011-01...	Womens Ministry (015-01-03-04)	Vanco Fees (016-03-00-02)
1011	Church at Large	☑	☐	Central Trust Checking (011-01...	Church at Large (015-01-04-01)	Vanco Fees (016-03-00-02)
1012	Social Concerns	☑	☐	Central Trust Checking (011-01...	Social Concerns (015-01-04-02)	Vanco Fees (016-03-00-02)
1013	Vanco Fees	☑	☐	Petty Cash (011-03-01-01)	Misc Fees (015-02-02-04)	Vanco Fees (016-03-00-02)
1014	Unmatched Funds	☑	☐	Farmers Savings Account (011...	Unmatched Funds (015-01-01-...	Vanco Fees (016-03-00-02)

Add/Edit Fund

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

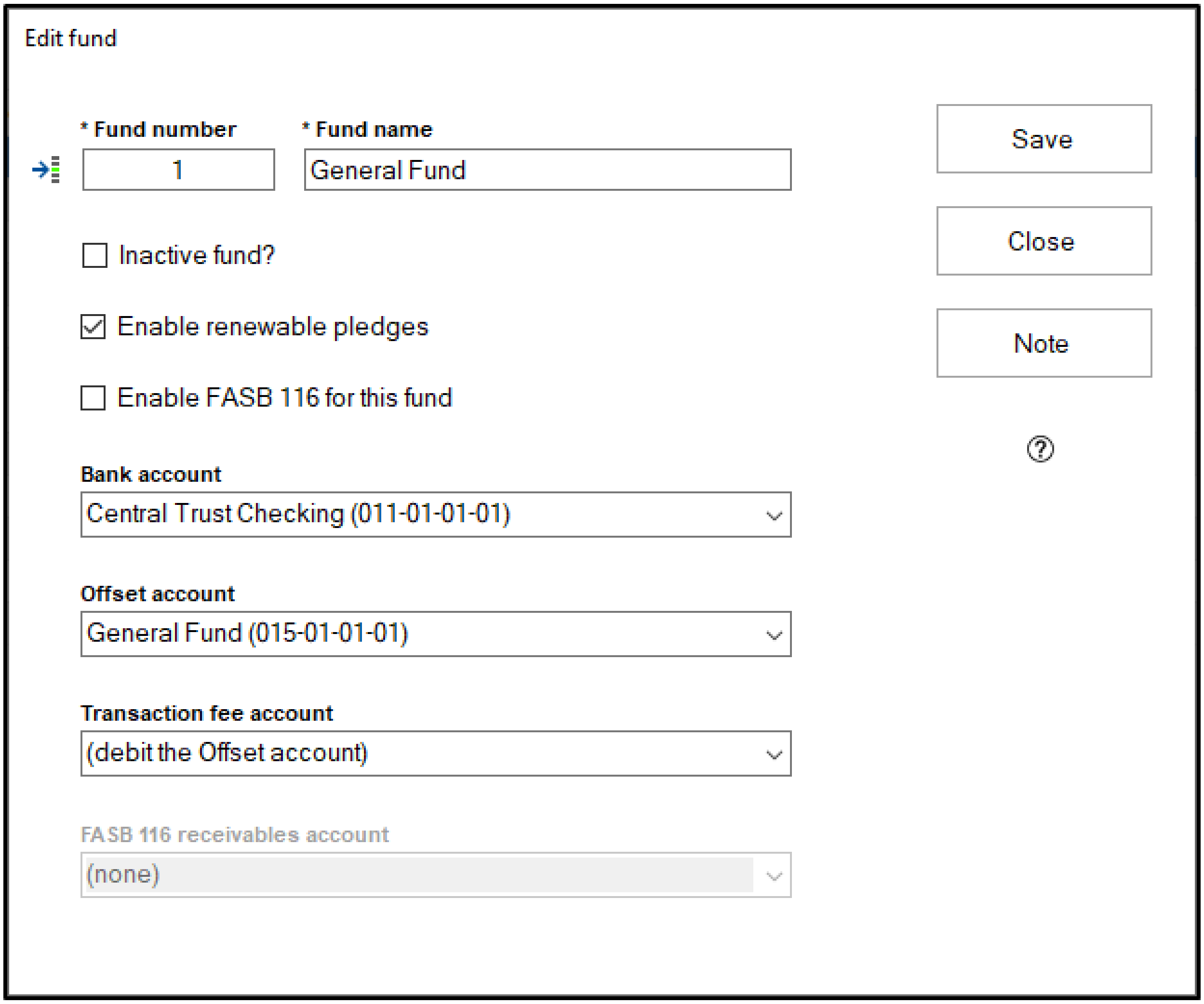
Add Fund

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



Edit Fund

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


Edit fund
* Fund number
1
* Fund name
General Fund
Save
Close
Note
Inactive fund?
Enable renewable pledges
Enable FASB 116 for this fund
Bank account
Central Trust Checking (011-01-01-01)
Offset account
General Fund (015-01-01-01)
Transaction fee account
(debit the Offset account)
FASB 116 receivables account
(none)

Connecting Funds in Contributions to Accounts in Finance

One feature offered in Shepherd's Staff is the ability to convert offering batches from the Contributions module into deposit transactions in the Finance module.

For these deposits to happen, you'll first create asset accounts in the Finance module for each Contribution fund and mark them as bank accounts.

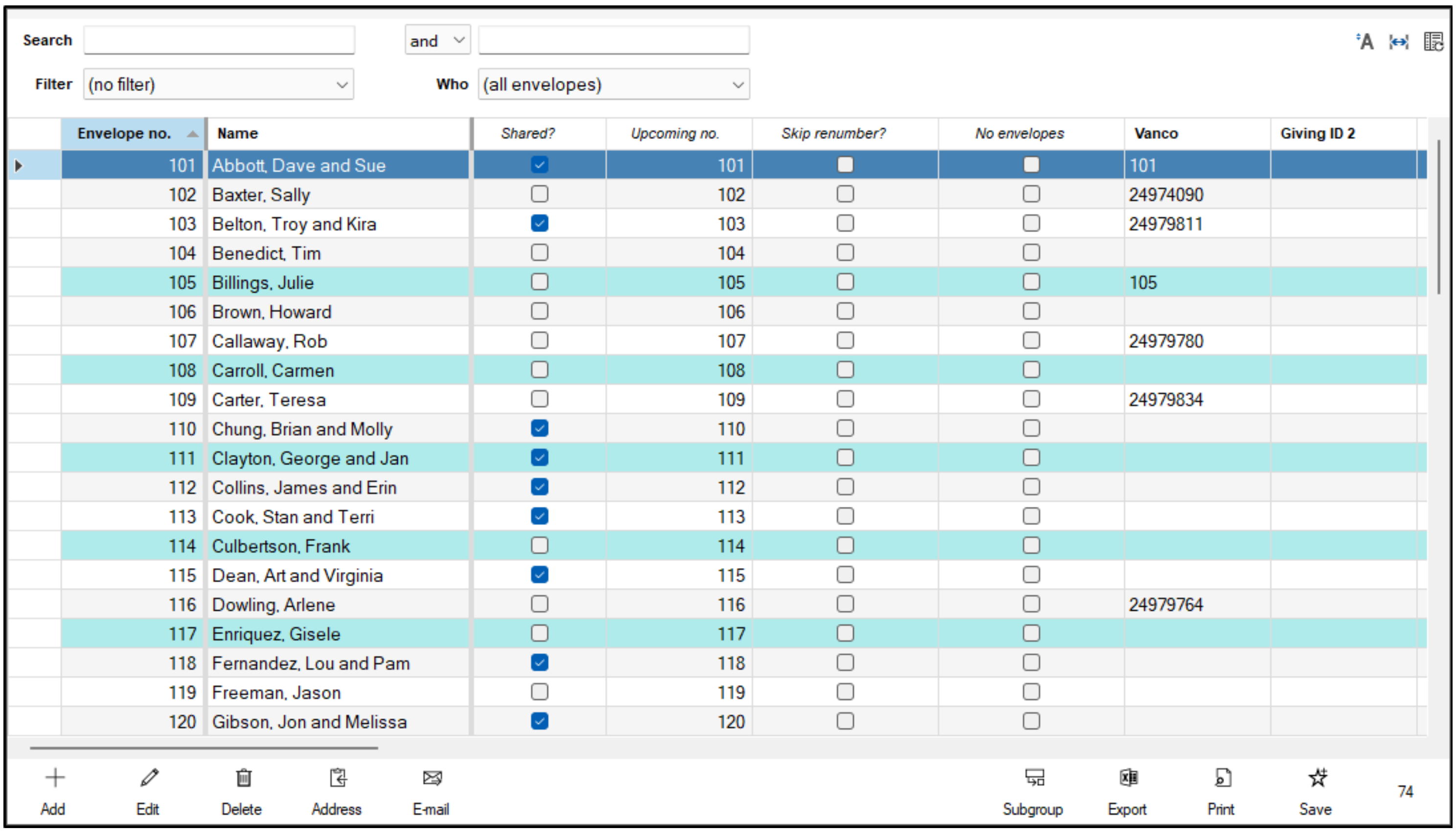
To connect a fund in Contributions to an account in Finance,

1. Open the Contributions Module.
2. Under the default Giving tab, go to Funds.
3. On the Funds view, you will need to either add a new fund by clicking the "Add" button at the bottom of the window or edit an existing fund by clicking the fund in the view and clicking the "Edit" button at the bottom fo the window.
4. In the pop-up window for the fund, there will be two drop-down menus. Use the Bank Account drop-down menu to select where the deposit will be added to. Multiple funds can be connected to the same bank account.
5. If applicable, use the Offset Account drop-down menu to select a tracking account for the deposit. Multiple funds can be connected to the same offset account. Only offset accounts sharing the same chart of accounts with the chosen bank account will be available.
6. If the fund is going to be used for online giving, and therefore, have fees associated with gifts towards it when givers give to this fund online, select an account to connect this fund to in the "Transaction fee account" box. You can select any expense account, or select the "(debit the Offset account)" to apply a debit to the income or dedicated account you selected in the "Offset Account" field.
7. Click the "Save" button to save your changes to the fund.

Contributors

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

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



Envelope no.	Name	Shared?	Upcoming no.	Skip renumber?	No envelopes	Vanco	Giving ID 2
101	Abbott, Dave and Sue	☑	101	☐	☐	101	
102	Baxter, Sally	☐	102	☐	☐	24974090	
103	Belton, Troy and Kira	☑	103	☐	☐	24979811	
104	Benedict, Tim	☐	104	☐	☐		
105	Billings, Julie	☐	105	☐	☐	105	
106	Brown, Howard	☐	106	☐	☐		
107	Callaway, Rob	☐	107	☐	☐	24979780	
108	Carroll, Carmen	☐	108	☐	☐		
109	Carter, Teresa	☐	109	☐	☐	24979834	
110	Chung, Brian and Molly	☑	110	☐	☐		
111	Clayton, George and Jan	☑	111	☐	☐		
112	Collins, James and Erin	☑	112	☐	☐		
113	Cook, Stan and Terri	☑	113	☐	☐		
114	Culbertson, Frank	☐	114	☐	☐		
115	Dean, Art and Virginia	☑	115	☐	☐		
116	Dowling, Arlene	☐	116	☐	☐	24979764	
117	Enriquez, Gisele	☐	117	☐	☐		
118	Fernandez, Lou and Pam	☑	118	☐	☐		
119	Freeman, Jason	☐	119	☐	☐		
120	Gibson, Jon and Melissa	☑	120	☐	☐		

Add/Edit Contributor (Envelope)

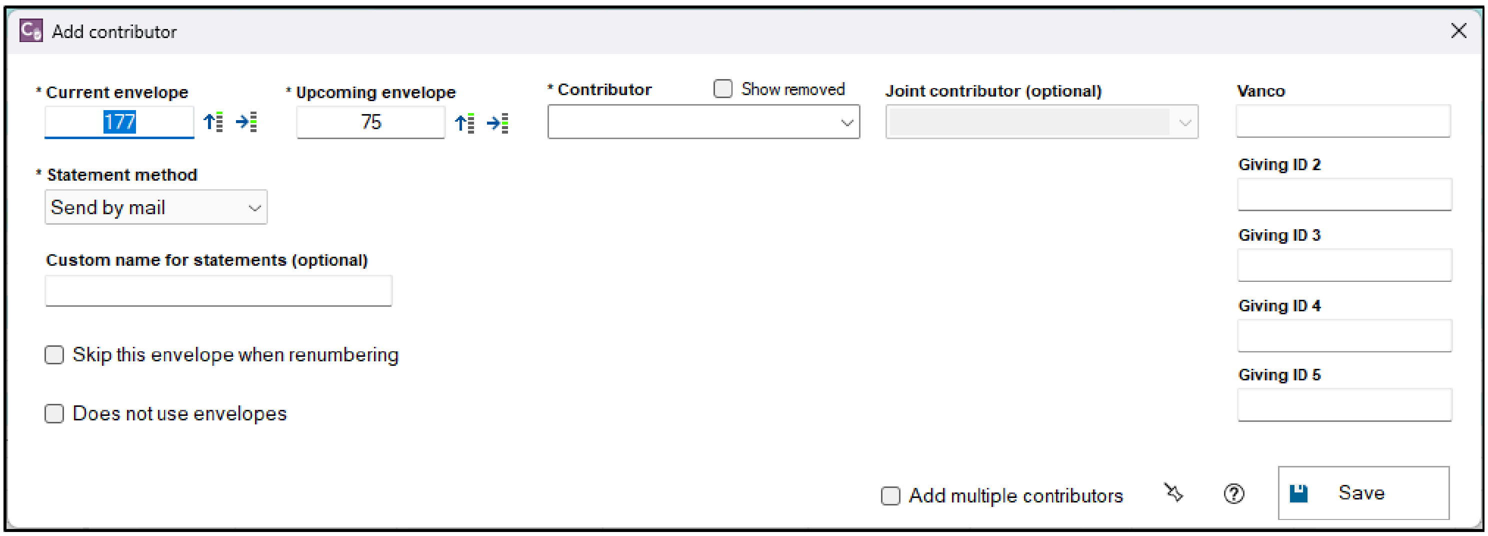
In order to record offerings for a person, they must first have a contributor record. This article walks you through the process of adding a new contributor or editing an already existing contributor.

Add a new Contributor

1. Access the Contributor Records grid by opening the Contributions module and go to "Giving>Contributors"
2. Click the "Add" button at the bottom of the grid to add a new envelope.
3. In the Add Contributor screen, in the "Current envelope" box, select what envelope number you want to assign. The box with the up arrow coming out of it will assign the next highest number, while the button with the box with an arrow pointing to the right will assign the next available envelope number. The "Upcoming envelope" box has the same options and controls the next envelope number this contributor will be assigned.
4. In the "Contributor" box, select which person this envelope number will be assigned to. You'll only be able to select people who are not already assigned an envelope number. The contributor box will also only show people who are not removed in the membership module. If you need to add an envelope to a removed person, make sure to check the "Show removed" box. If there is another person in the same household who is not already assigned an envelope number, you'll be able to select that person in the "Joint contributor" box. This will make it so that the selected people will share an envelope number.
5. The "Statement method" box dictates how a person receives their contribution statements. "Send by mail" means that this person will receive a printed statement. "Send by e-mail" means that this person will receive their contribution statement via email. "DO NOT SEND" means the person will not receive a contribution statement.
6. The "Custom name for statements" field will let you use a custom name for this contributor(s) on their contribution statement.
7. If you want the envelope number you entered under Current Envelope to remain the same even after you do a year-end renumbering, check the box next to "Skip this envelope when renumbering".
    - This will default the "Upcoming envelope" field to match the "Current envelope" field, grey it out, and prevent this person or envelope # from being included when using the "Renumber Next Year envelopes" utility under Tools/Settings. This person will retain their envelope number, and it will not be available to be assigned to anyone else.

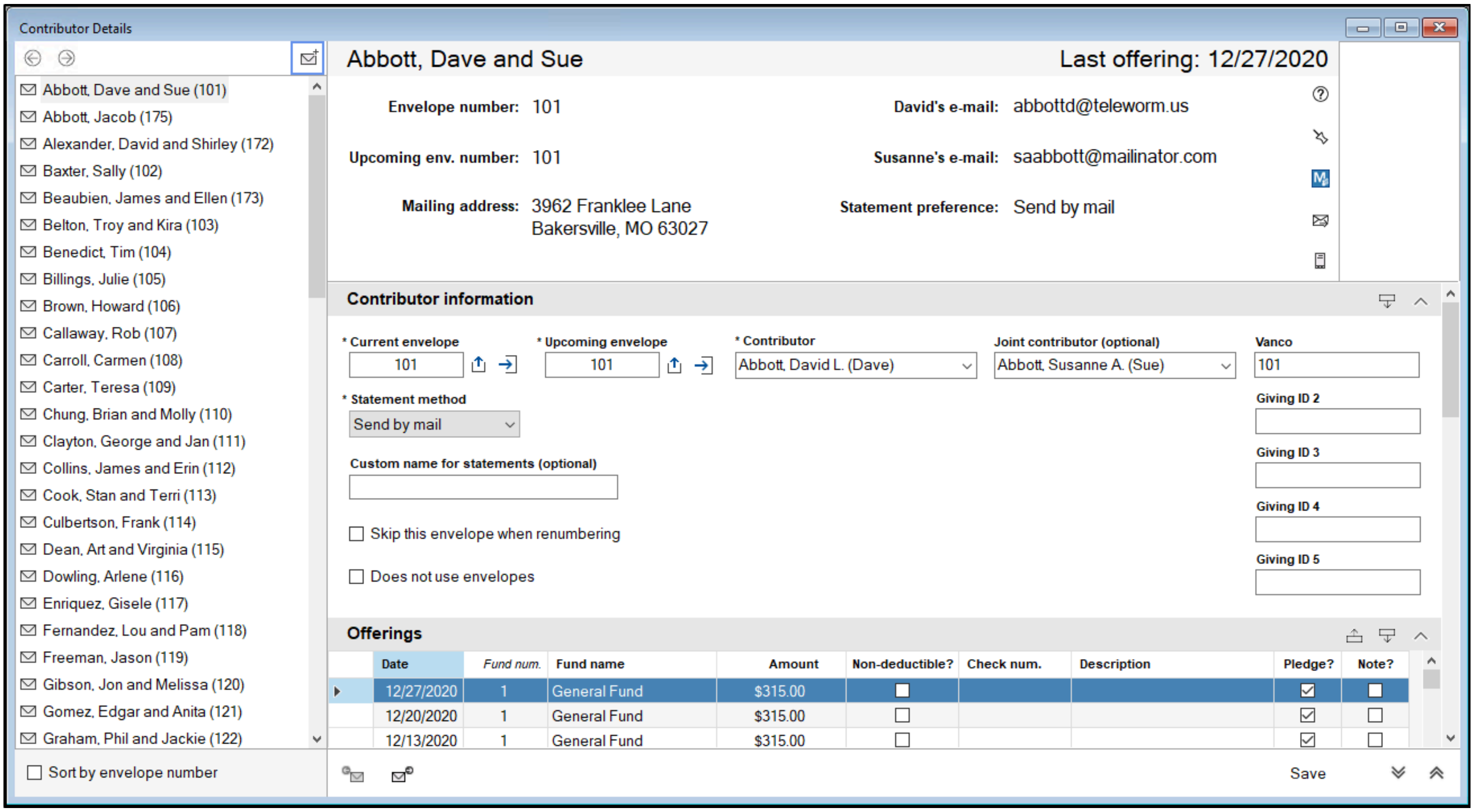
8. If a person is no longer going to be receiving an envelope, and shouldn't be included in future envelope renumberings because they intend to give online, are no longer coming to your church, have passed away, etc., but you wish to retain their Contributor record and Offering data, check "Does not use envelopes" box.
    - This will change their "Upcoming envelope" field to a 6-digit number. They will be excluded, but their "Current envelope" will be released to be reassigned to someone else when you next use the "Renumber Next Year envelopes" utility under Tools/Settings.

9. The Vanco and Giving ID 2-5 boxes are for the listing of any giving ID's that might be associated with a person on an e-giving platform. By listing these giving ID's here, it will make it so any imported giving, either through the Vanco import or "Other giving source" import can be associated with this contributor.
10. Check the "Add multiple contributors" box if you're adding more than one contributor record. Click the "Save" button when finished.



Edit an existing contributor

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


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

Pledges

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

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

The Pledge grid also offers a variety of reports when you click the "Print" button. These reports include a listing of all your pledges, grouped in various ways, including by giver, by fund, and by frequency, as well as an option to create mailing labels. For the reports that show a listing of your pledges, Shepherd's Staff will also provide statistical information about your pledges, including Median total pledge amount, Highest total pledge amount, pledge count, contributor count, fund count, Median pledge amount, and Most common (mode) pledge amount, depending on which grouping you select.

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

Search [ ] and [ ] ☐ Hide inactive

Filter (no filter) Who (all envelopes)

Envelope	Name	Fund no.	Fund	Amount	Frequency	Begin	End	Total pledge
101	Abbott, Dave and Sue	1009	Young Adults Ministry	$1,500.00	Full amount	1/1/2025	12/31/2025	$1,500.00
101	Abbott, Dave and Sue	1009	Young Adults Ministry	$25.00	Full amount	1/1/2024	12/31/2024	$25.00
101	Abbott, Dave and Sue	1001	General Fund	$279.00	Weekly	1/1/2024	12/31/2024	$14,508.00
101	Abbott, Dave and Sue	1002	Mission Fund	$65.00	Full amount	1/1/2024	12/31/2024	$65.00
101	Abbott, Dave and Sue	1004	Building Fund	$50.00	Full amount	1/1/2024	12/31/2024	$50.00
101	Abbott, Dave and Sue	1006	Education	$25.00	Full amount	1/1/2024	12/31/2024	$25.00
101	Abbott, Dave and Sue	1007	Music Ministry	$25.00	Full amount	1/1/2024	12/31/2024	$25.00
101	Abbott, Dave and Sue	1001	General Fund	$279.00	Weekly	1/1/2023	12/31/2023	$14,787.00
101	Abbott, Dave and Sue	1002	Mission Fund	$65.00	Full amount	1/1/2023	12/31/2023	$65.00
101	Abbott, Dave and Sue	1006	Education	$25.00	Full amount	1/1/2023	12/31/2023	$25.00
101	Abbott, Dave and Sue	1007	Music Ministry	$25.00	Full amount	1/1/2023	12/31/2023	$25.00
101	Abbott, Dave and Sue	1004	Building Fund	$50.00	Full amount	1/1/2023	12/31/2023	$50.00
101	Abbott, Dave and Sue	1001	General Fund	$14,490.00	Full amount	1/1/2022	12/31/2022	$14,490.00
101	Abbott, Dave and Sue	1002	Mission Fund	$65.00	Full amount	1/1/2022	12/31/2022	$65.00
101	Abbott, Dave and Sue	1004	Building Fund	$50.00	Full amount	1/1/2022	12/31/2022	$50.00
101	Abbott, Dave and Sue	1006	Education	$25.00	Full amount	1/1/2022	12/31/2022	$25.00
101	Abbott, Dave and Sue	1007	Music Ministry	$25.00	Full amount	1/1/2022	12/31/2022	$25.00
101	Abbott, Dave and Sue	1009	Young Adults Ministry	$25.00	Full amount	1/1/2022	12/31/2022	$25.00
101	Abbott, Dave and Sue	1001	General Fund	$230.00	Weekly	1/1/2021	12/31/2021	$11,960.00
101	Abbott, Dave and Sue	1002	Mission Fund	$65.00	Full amount	1/1/2021	12/31/2021	$65.00

Add Edit Copy Delete Mass add Subgroup Export Print Save 1,666

Pledge Rules

In order to successfully enter Pledges into Shepherd's Staff and track those pledges accurately, there are a few rules users should keep in mind as they are entering and maintaining pledges:

1. No two pledges can be entered for the same contributor (same envelope #) for the same contribution fund with overlapping date ranges. Churches that want to be able to do this should set up multiple Funds that represent one actual Fund (for example, Building Fund A, Building Fund B, Building Fund C). Funds of this nature can all be tied into the same Bank and Offset Accounts for auto-deposit.
2. Pledges can be entered at any time, regardless of dates. This means you can enter next year’s pledges before the current pledges are complete. This is important because of the next rule.
3. Offerings entered after pledge is entered will be credited towards the “active” entered pledge. Offerings entered before a corresponding pledge is entered will not be automatically credited toward the pledge. In other words, offerings only get applied to a pledge if the pledge is in the database before the offerings.
4. Pledges that are entered later than the offerings must be attached to get the offerings connected to the pledge. If you want to attach all unattached offerings to all pledges, see the page entitled Attach offerings to pledges
5. When an active pledge changes in any manner, that pledge needs to be ended and a new pledge started. For this, you will want to edit the pledge in question and set the end date to the day before the pledge changed.
6. New pledges should be entered each year. Do not create new pledges by editing the existing Pledges and changing dates or amounts. If you find that your contributors are using the same types of pledges every year, consider using Renewable Pledges. See the page entitled Repeat Expired Pledges for more information.

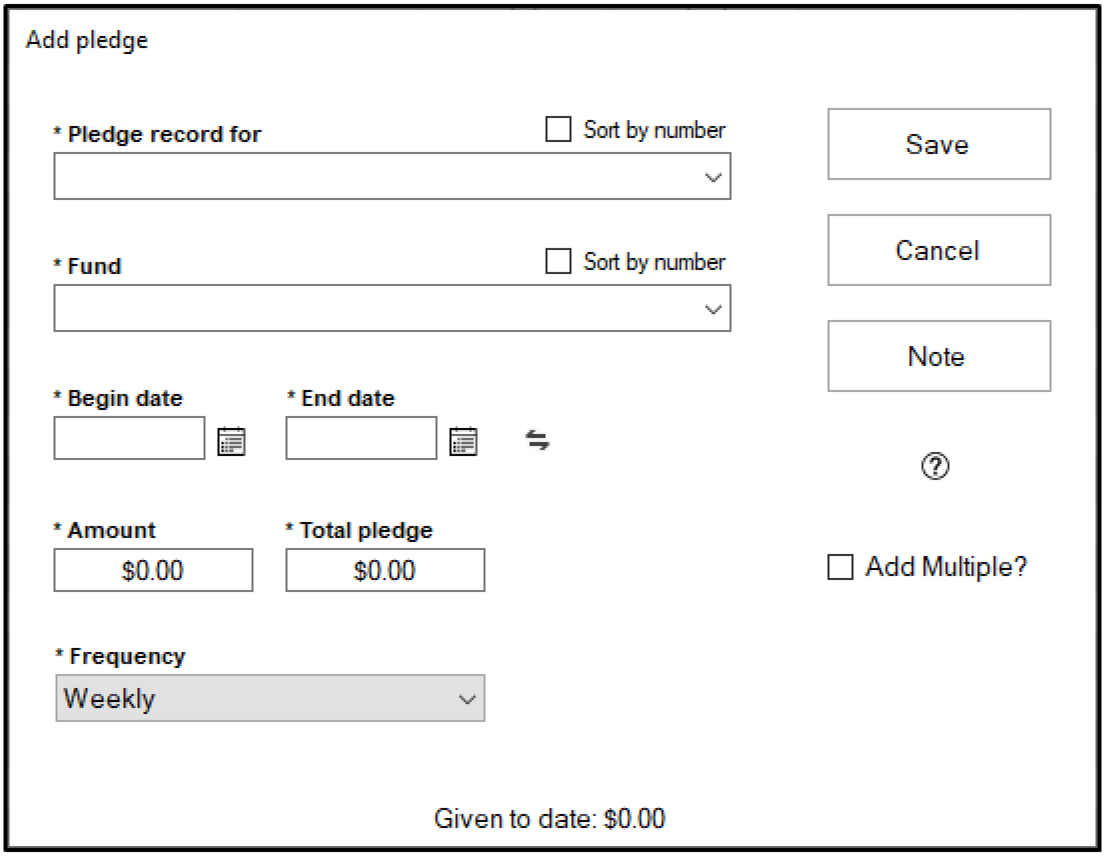
Add/Edit Pledge

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

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

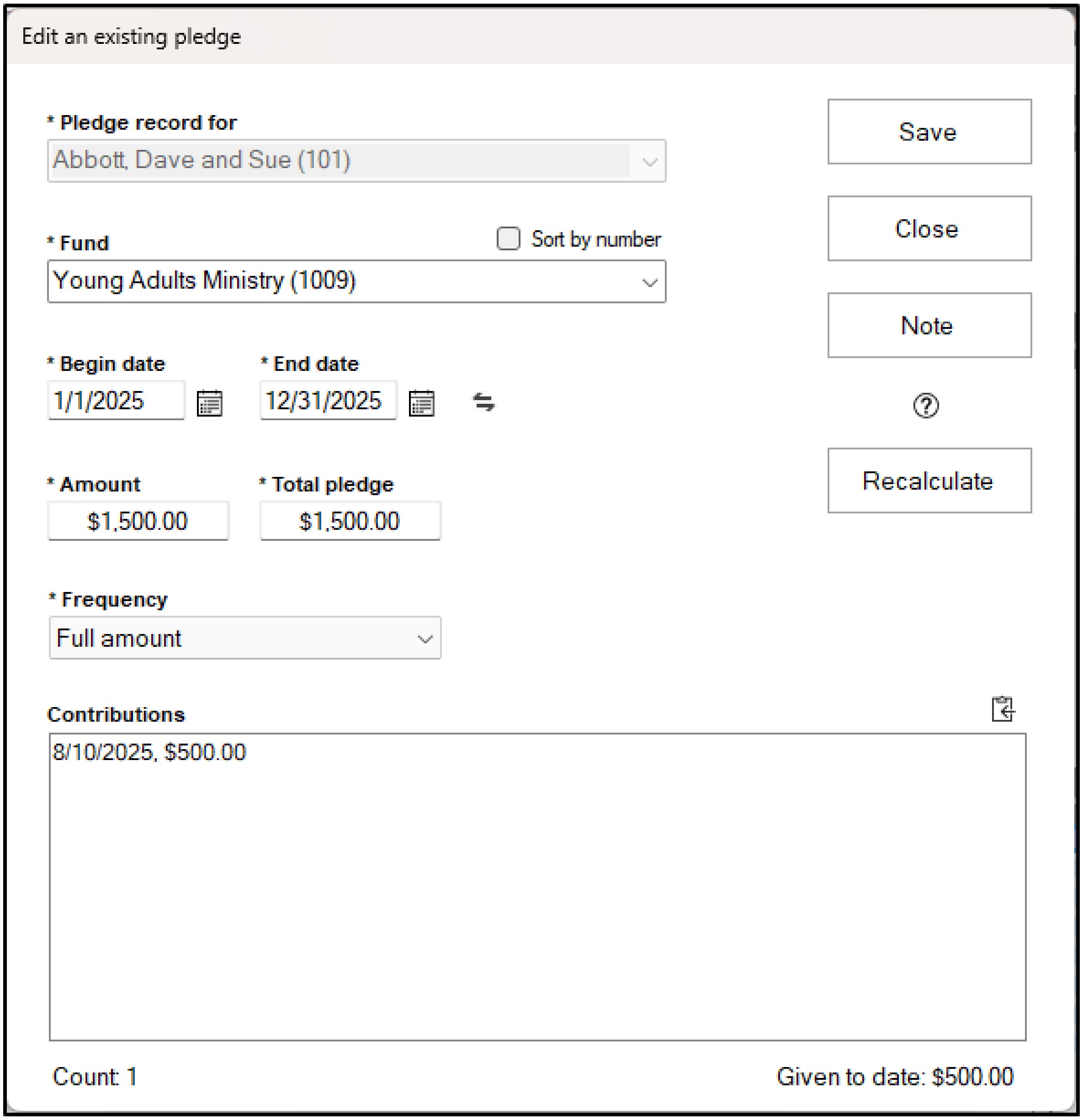
Add Pledge

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



Edit Pledge

1. To edit a pledge, access the pledge record grid, and find the pledge record that you need to make a change to.
2. Double-click or click on the pledge record and then click "Edit" to start editing the pledge record.
3. You can edit any aspect of a pledge, including who the pledge is for, which fund the pledge is for, beginning and ending dates, amount, total pledge or frequency.
4. Clicking the "Recalculate" button will look at all offerings assigned to this pledge, remove them, and then add all offerings that were given by this contributor to the selected fund, during the time period designated in the 'Begin date" and "End date" field back to this pledge.
5. The "Contributions" section will show each offering that is a part of the pledge you are editing
6. Click "Save" when finished editing.


Edit an existing pledge
* Pledge record for
Abbott, Dave and Sue (101)
* Fund
Sort by number
Young Adults Ministry (1009)
* Begin date
1/1/2025
* End date
12/31/2025
* Amount
$1,500.00
* Total pledge
$1,500.00
* Frequency
Full amount
Contributions
8/10/2025, $500.00
Count: 1
Given to date: $500.00
Save
Close
Note
Recalculate

Handling Marriages

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

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

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

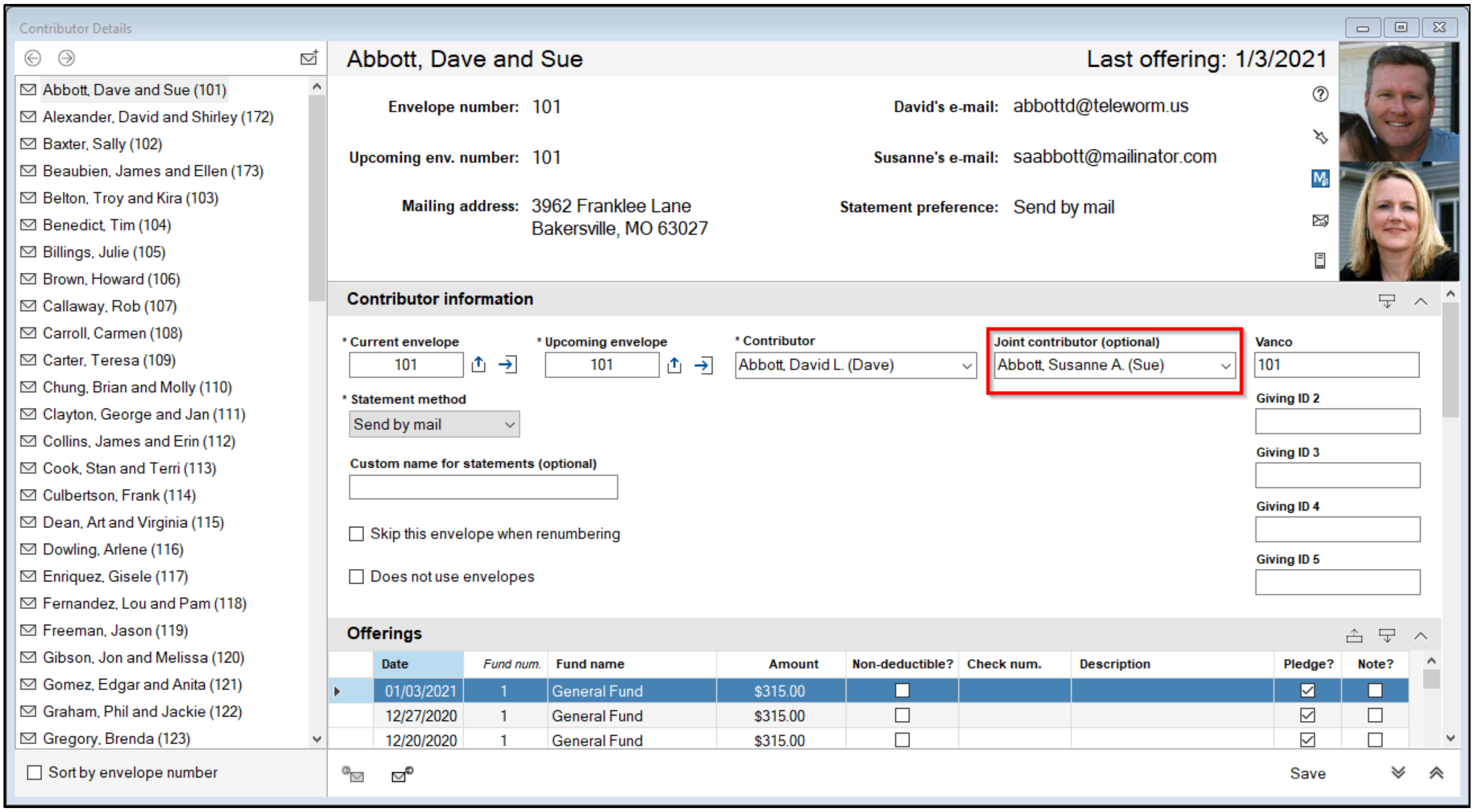
The first step you want to take is creating a backup of your database. For instructions on this see “Backing up Your Database”

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

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

If only one Member has an Envelope:

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



Both Members Have Envelopes:

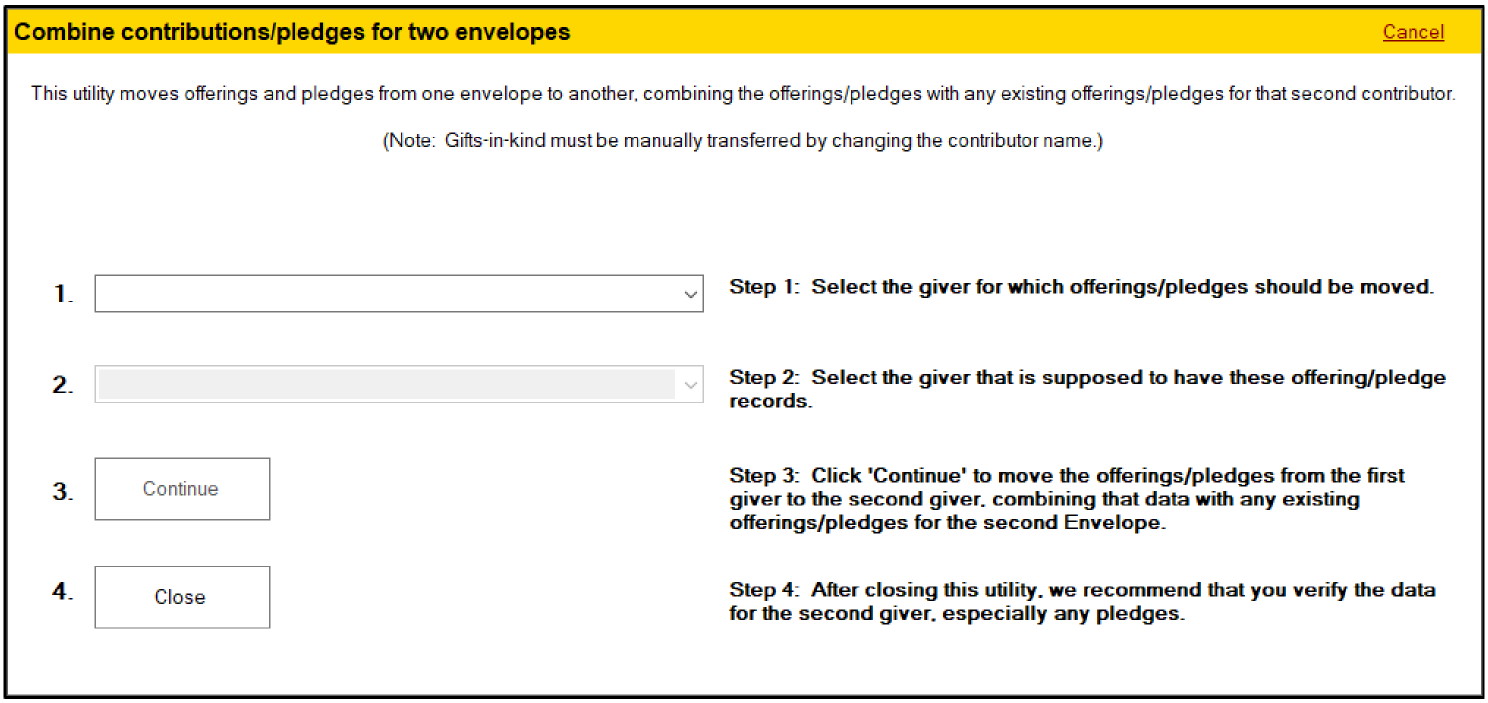
1. In the Contributions module, click on Tools/Settings, and under Data tools, select "Combine Contributions for two envelopes"
2. Confirm that you've made a backup in the window that appears. If you haven't made a backup, click the "Make backup" button and create a backup of your data. Once this is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

9. In the window that appears check the box for "Delete contributor record for *Contributor Name*" and then click "Continue" and confirm the deletion of this contributor record.

10. Back on the Contributor grid, find the envelope where you moved all the offerings. Click on it to highlight it, and then click "Edit"

11. In the window that appears, in the "Joint contributor" field, select the contributor's spouse.

12. Click the "Save" button in the bottom right corner of the window to save your changes.



Divorce (or Separation)

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

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

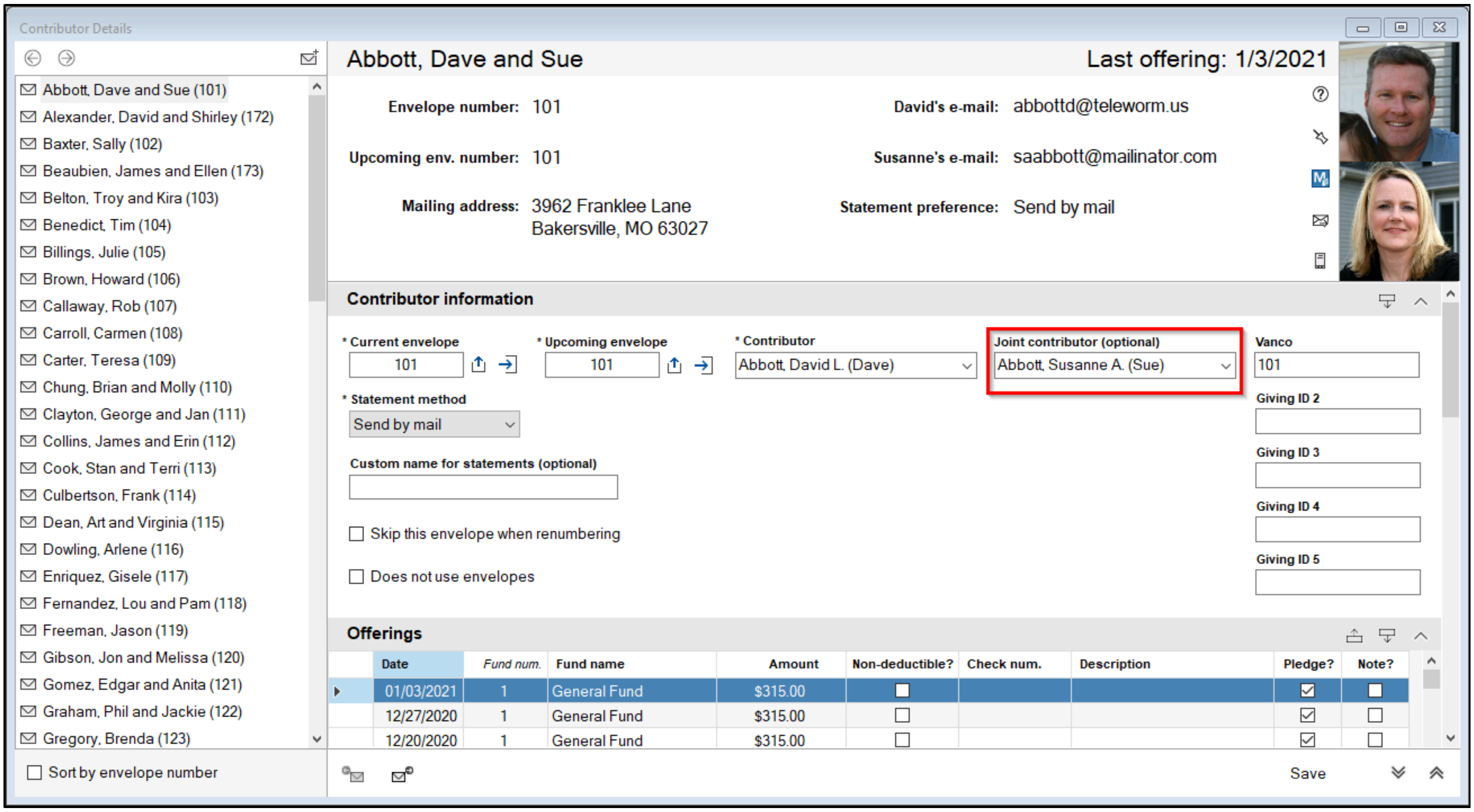
With that in mind, it’s recommended that you print contribution statements prior to these steps so there is a record of the joint giving.

One Contributor is Leaving the Church

1. Open the Contributions module, click on Giving and then click "Contributors"
2. Find the Contributor Record that you need to edit.
3. In the Contributor information section, click the pencil icon above the "Joint contributor" field to edit it, and select (none), and click Continue. This will remove the joint contributor from the envelope.
4. If the Contributor who is staying at the church was the Joint contributor, click the Pencil icon above the Contributor field as well, and change the selection to the person who is staying, and click Continue.
5. Click Save at the bottom right-hand corner of the window.

Both Contributors are Staying at the Church

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


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

Deaths

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

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

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

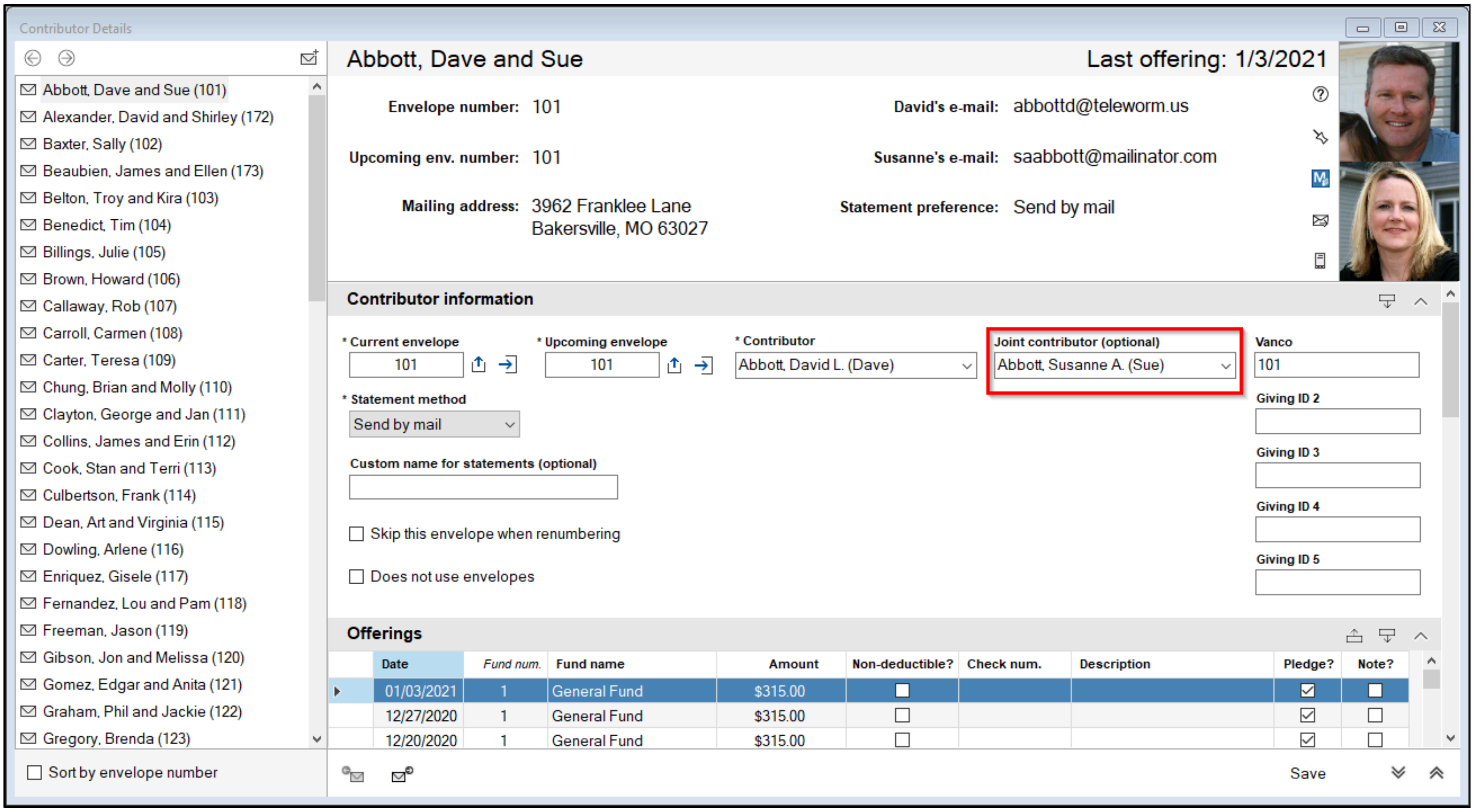
Important: We recommend not deleting any records until after the year has ended.

» Surviving Spouse

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

» No Surviving Spouse

1. In the Contributions module, click on Giving and then choose "Contributors"
2. Highlight the record you need to update and click "Edit"
3. Check the "Does not use physical envelopes." box. This will change the Upcoming envelope number for the person to a number in the six-digit range, and keep them from getting a new number in a future renumbering. If your church doesn't do an envelope renumbering at the end of the year, you'll also want to update this contributor's Current Envelope to match the Upcoming envelope field.
4. Click "Save" at the bottom right-hand corner of the grid to save your changes.


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

Delete Contributor

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

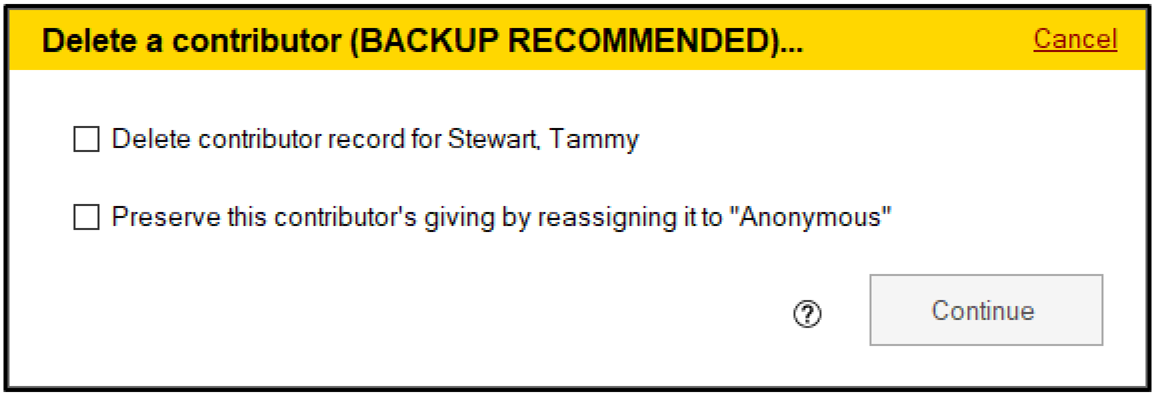
It’s recommended that you leave these contributors there as this will keep this contributor’s history in the database.

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

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

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

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


Delete a contributor (BACKUP RECOMMENDED)...
Cancel
Delete contributor record for Stewart, Tammy
Preserve this contributor's giving by reassigning it to "Anonymous"
Continue

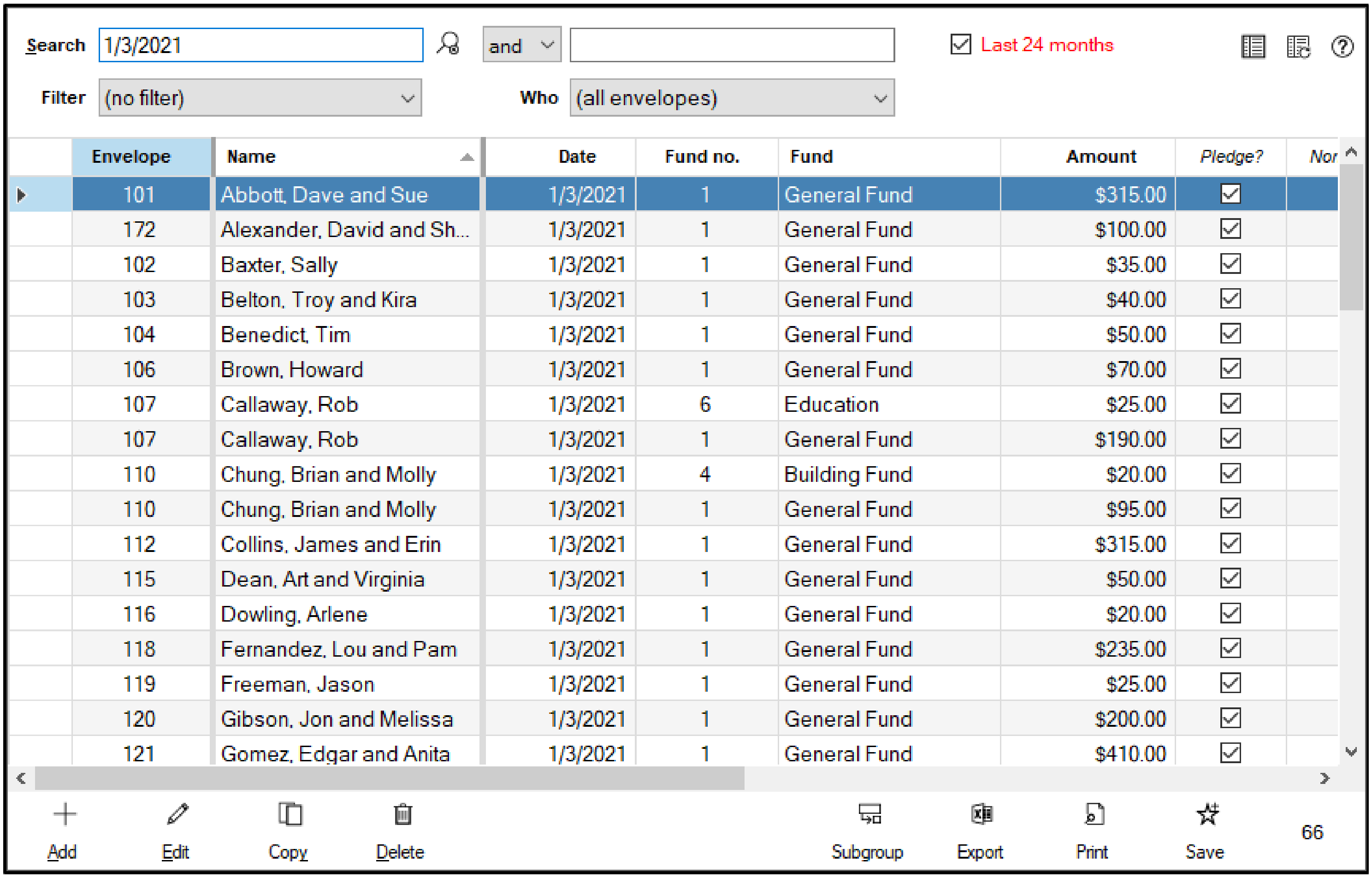
Editing a Posted Batch

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

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

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

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

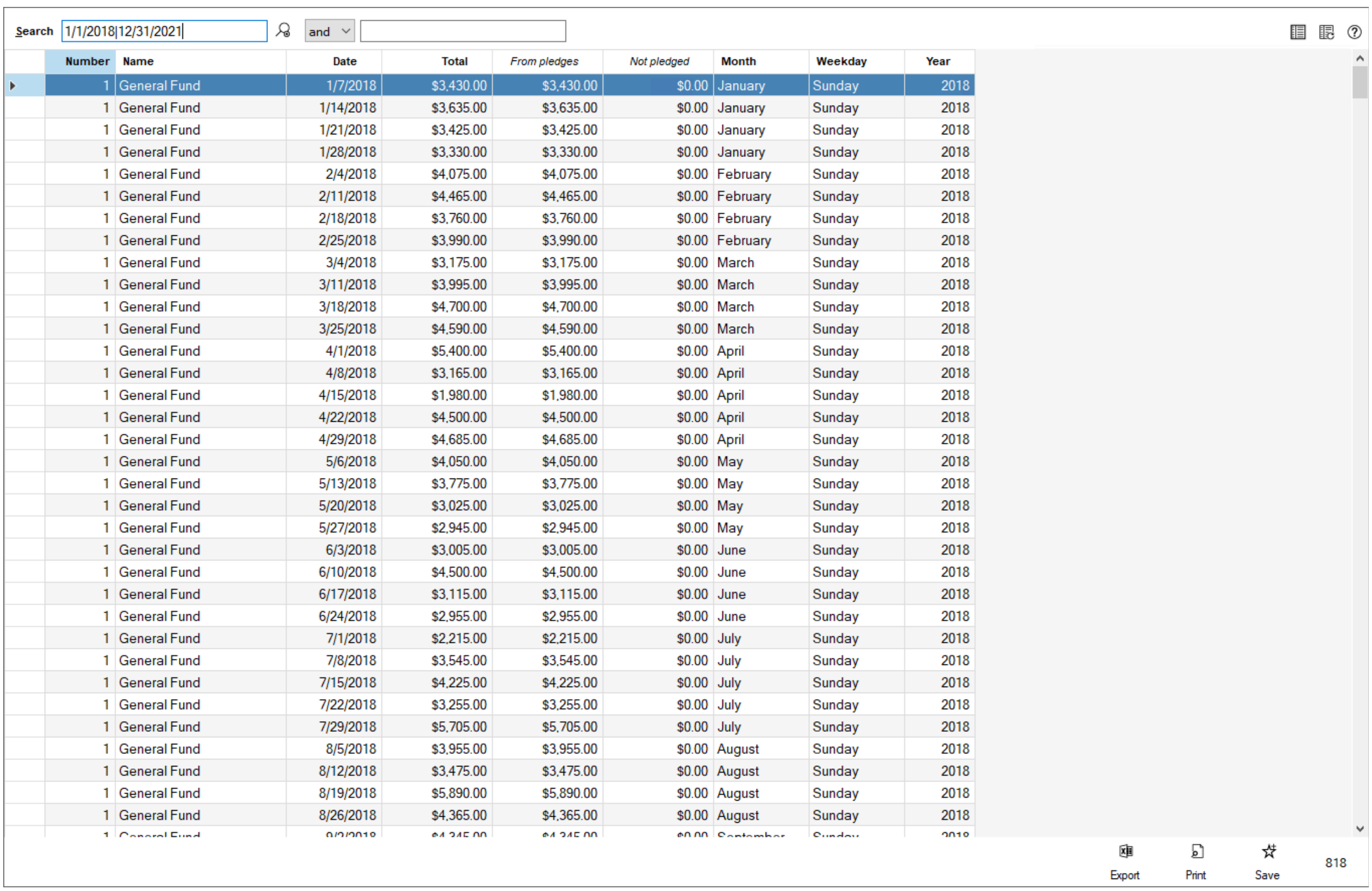


Envelope	Name	Date	Fund no.	Fund	Amount	Pledge?	Nor
101	Abbott, Dave and Sue	1/3/2021	1	General Fund	$315.00	☑	
172	Alexander, David and Sh...	1/3/2021	1	General Fund	$100.00	☑	
102	Baxter, Sally	1/3/2021	1	General Fund	$35.00	☑	
103	Belton, Troy and Kira	1/3/2021	1	General Fund	$40.00	☑	
104	Benedict,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

Sum by fund, day

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

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

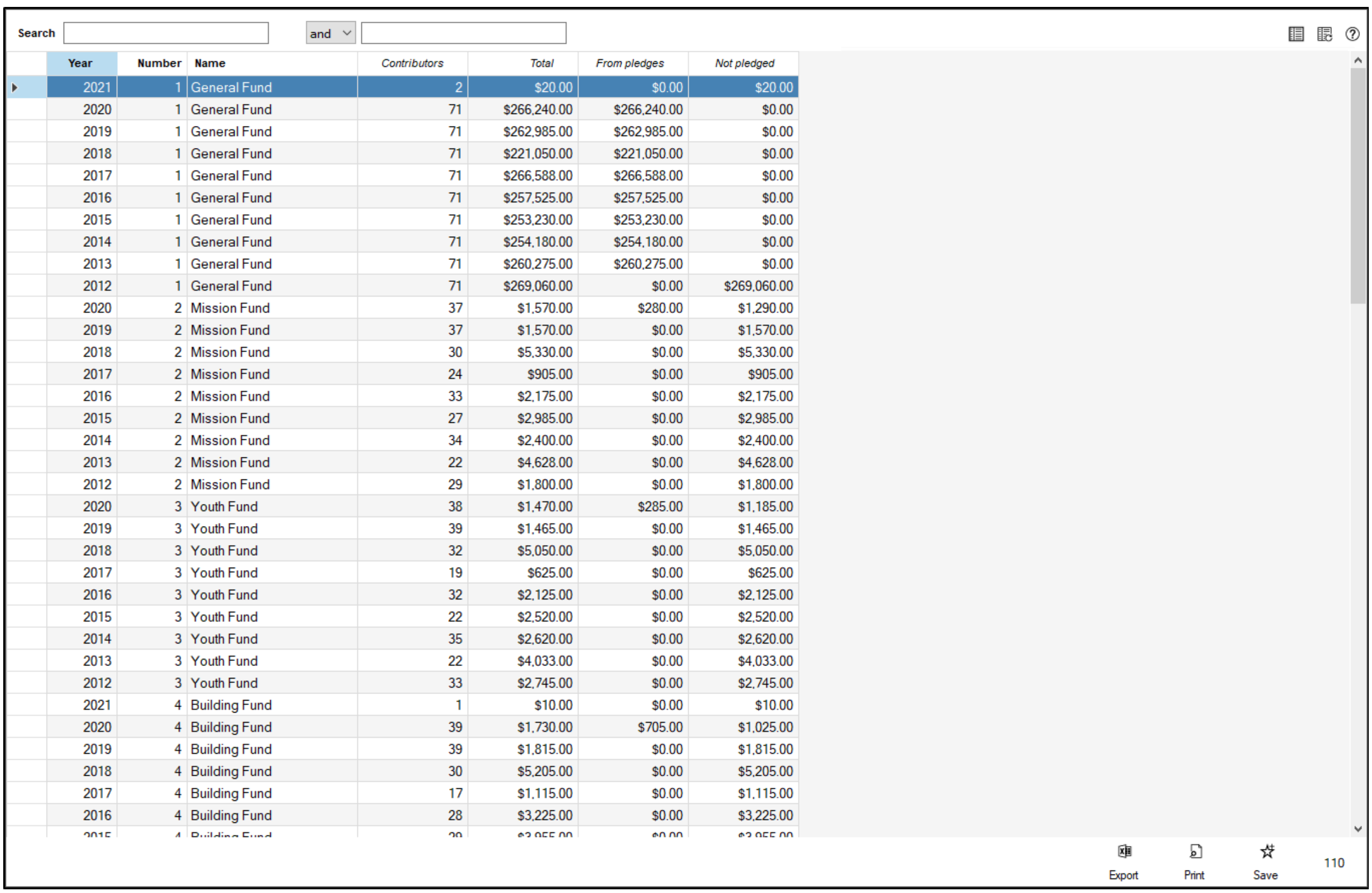


Number	Name	Date	Total	From pledges	Not pledged	Month	Weekday	Year
1	General Fund	1/7/2018	$3,430.00	$3,430.00	$0.00	January	Sunday	2018
1	General Fund	1/14/2018	$3,635.00	$3,635.00	$0.00	January	Sunday	2018
1	General Fund	1/21/2018	$3,425.00	$3,425.00	$0.00	January	Sunday	2018
1	General Fund	1/28/2018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

Sum by fund, year

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

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


Search and

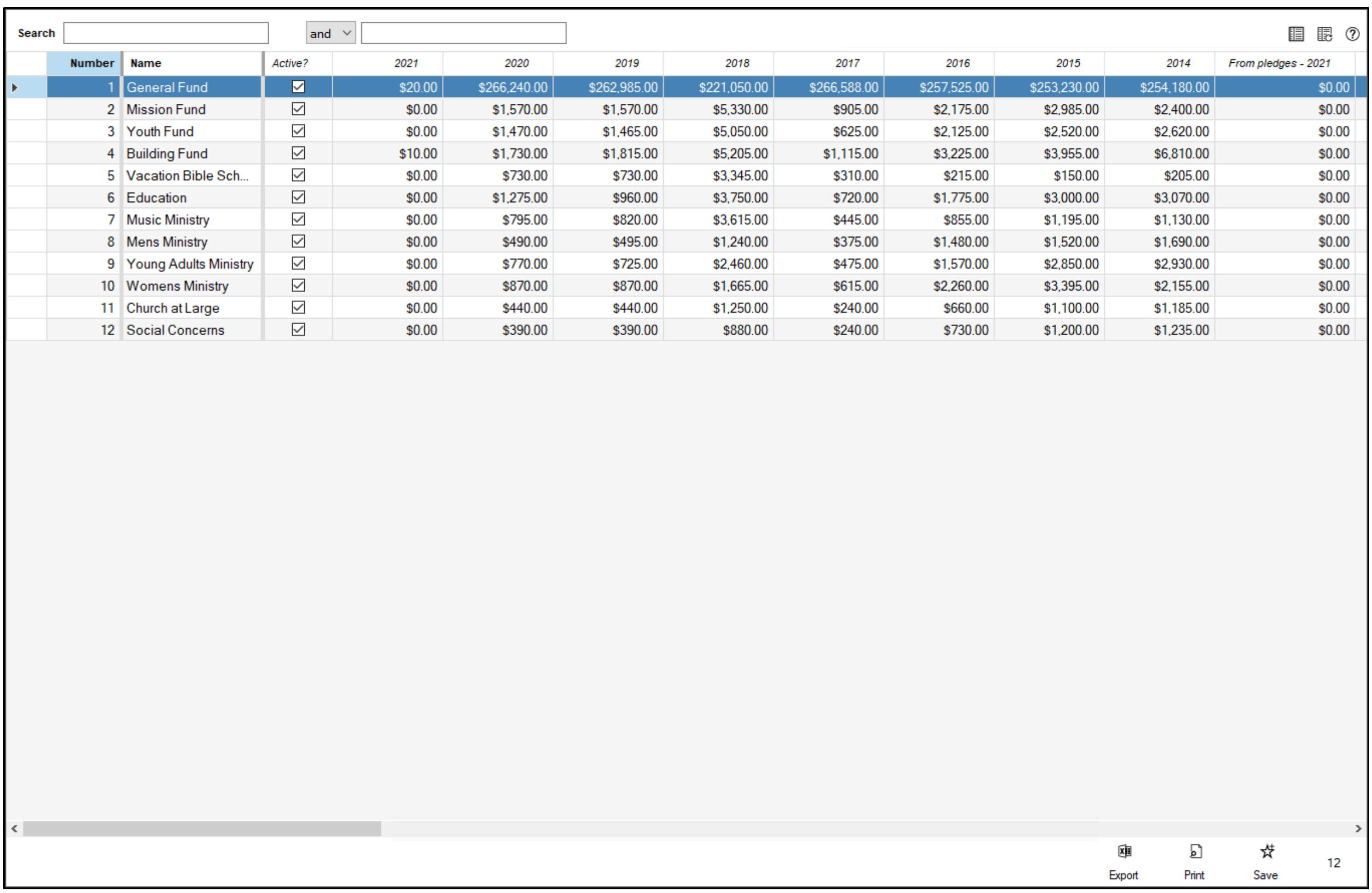
Year	Number	Name	Contributors	Total	From pledges	Not pledged
2021	1	General Fund	2	$20.00	$0.00	$20.00
2020	1	General Fund	71	$266,240.00	$266,240.00	$0.00
2019	1	General Fund	71	$262,985.00	$262,985.00	$0.00
2018	1	General Fund	71	$221,050.00	$221,050.00	$0.00
2017	1	General Fund	71	$266,588.00	$266,588.00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

Export Print Save 110

Sum by fund, year (across)

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

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



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

Sum by year and month

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

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

Search and

Filter (no filter)

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

Export Print Save 30

Sum by fund, year, month

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

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

Search and

Filter (no filter)

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

Export Print Save 330

Sum by contributor, year

The Sum by contributor, year view is a view that will show you each contributor, and the total that they contributed in each year. The data grid for this view will show you the envelope number and name of each contributor, the year, the overall total that they gave to all funds, the total of pledged giving, and the total of unpledged giving.

1. You can access the Sum by contributor, year view by opening the contributions module, clicking on Summaries, and then clicking "By contributor, year"
2. You can search for particular entries on this grid by using the search boxes at the top of the grid. You can also filter to look at only particular contributors by using the "Who" option and selecting which group of contributors you'd like to look at. See our article on search and filter for more details on how to use the search boxes.
3. Clicking Print will provide you with three reporting options. (default) will print a report as you see it on the grid. By giver will show you a report, grouped by giver, showing overall totals for each giver, and then totals for each year for each giver. By year will give you a report that's grouped by year, showing you annual totals for each year, and totals for each giver for the year under that.

Search and

Who (all envelopes)

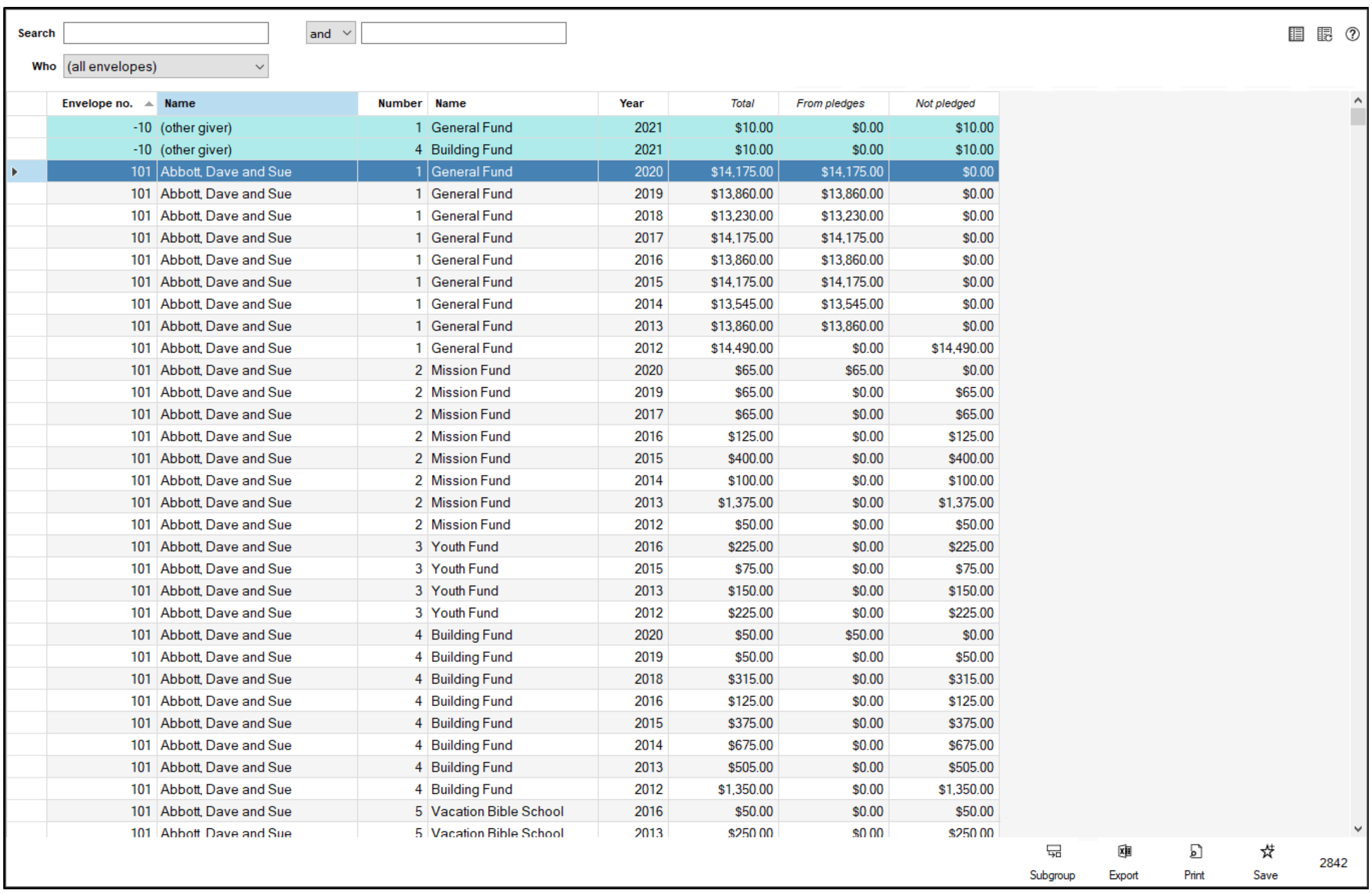
Envelope no.	Name	Year	Total	From pledges	Not pledged
-10	(other giver)	2021	$20.00	$0.00	$20.00
101	Abbott, Dave and Sue	2020	$14,365.00	$14,340.00	$25.00
101	Abbott, Dave and Sue	2019	$14,050.00	$13,860.00	$190.00
101	Abbott, Dave and Sue	2018	$14,175.00	$13,230.00	$945.00
101	Abbott, Dave and Sue	2017	$14,265.00	$14,175.00	$90.00
101	Abbott, Dave and Sue	2016	$14,910.00	$13,860.00	$1,050.00
101	Abbott, Dave and Sue	2015	$15,830.00	$14,175.00	$1,655.00
101	Abbott, Dave and Sue	2014	$14,870.00	$13,545.00	$1,325.00
101	Abbott, Dave and Sue	2013	$16,895.00	$13,860.00	$3,035.00
101	Abbott, Dave and Sue	2012	$17,690.00	$0.00	$17,690.00
102	Baxter, Sally	2020	$525.00	$525.00	$0.00
102	Baxter, Sally	2019	$750.00	$735.00	$15.00
102	Baxter, Sally	2018	$455.00	$385.00	$70.00
102	Baxter, Sally	2017	$560.00	$560.00	$0.00
102	Baxter, Sally	2016	$455.00	$455.00	$0.00
102	Baxter, Sally	2015	$455.00	$455.00	$0.00
102	Baxter, Sally	2014	$595.00	$595.00	$0.00
102	Baxter, Sally	2013	$455.00	$455.00	$0.00
102	Baxter, Sally	2012	$500.00	$0.00	$500.00
103	Belton, Troy and Kira	2020	$1,690.00	$1,670.00	$20.00
103	Belton, Troy and Kira	2019	$1,730.00	$1,655.00	$75.00
103	Belton, Troy and Kira	2018	$1,720.00	$1,440.00	$280.00
103	Belton, Troy and Kira	2017	$1,520.00	$1,520.00	$0.00
103	Belton, Troy and Kira	2016	$1,680.00	$1,680.00	$0.00
103	Belton, Troy and Kira	2015	$1,720.00	$1,720.00	$0.00
103	Belton, Troy and Kira	2014	$1,760.00	$1,760.00	$0.00
103	Belton, Troy and Kira	2013	$1,800.00	$1,800.00	$0.00
103	Belton, Troy and Kira	2012	$1,675.00	$0.00	$1,675.00
104	Benedict, Tim	2020	$990.00	$940.00	$50.00
104	Benedict, Tim	2019	$1,040.00	$990.00	$50.00
104	Benedict, Tim	2018	$800.00	$650.00	$150.00
104	Benedict, Tim	2017	$960.00	$945.00	$15.00
104	Benedict, Tim	2016	$950.00	$950.00	$0.00

Subgroup Export Print Save 641

Sum by contributor, fund, year

The Sum by contributor, fund, year report is a view that will show you contributions from each contributor, to each fund, for each year they gave. Every Contributor/Fund/Year combination gets its own row in this view, and giving for each of these combinations is broken out by total, pledged total and unpledged total.

1. You can access the Sum by contributor, fund, year view by opening the contributions module, clicking on Summaries, and then clicking "By contributor, fund, year"
2. You can search for particular entries on this grid by using the search boxes at the top of the grid. You can also filter which group of contributors you're viewing by using the "Who" option and selecting which group of contributors you'd like to look at. See our article on search and filter for more details on how to use the search boxes.
3. Clicking the report option will give you a variety of different options, including the view as you see it on the grid, sorted by giver, fund, sorted by fund, giver, sorted by fund, year and sorted by year, fund.


Search and
Who (all envelopes)

Envelope no.	Name	Number	Name	Year	Total	From pledges	Not pledged
-10	(other giver)	1	General Fund	2021	$10.00	$0.00	$10.00
-10	(other giver)	4	Building Fund	2021	$10.00	$0.00	$10.00
101	Abbott, Dave and Sue	1	General Fund	2020	$14,175.00	$14,175.00	$0.00
101	Abbott, Dave and Sue	1	General Fund	2019	$13,860.00	$13,860.00	$0.00
101	Abbott, Dave and Sue	1	General Fund	2018	$13,230.00	$13,230.00	$0.00
101	Abbott, Dave and Sue	1	General Fund	2017	$14,175.00	$14,175.00	$0.00
101	Abbott, Dave and Sue	1	General Fund	2016	$13,860.00	$13,860.00	$0.00
101	Abbott, Dave and Sue	1	General Fund	2015	$14,175.00	$14,175.00	$0.00
101	Abbott, Dave and Sue	1	General Fund	2014	$13,545.00	$13,545.00	$0.00
101	Abbott, Dave and Sue	1	General Fund	2013	$13,860.00	$13,860.00	$0.00
101	Abbott, Dave and Sue	1	General Fund	2012	$14,490.00	$0.00	$14,490.00
101	Abbott, Dave and Sue	2	Mission Fund	2020	$65.00	$65.00	$0.00
101	Abbott, Dave and Sue	2	Mission Fund	2019	$65.00	$0.00	$65.00
101	Abbott, Dave and Sue	2	Mission Fund	2017	$65.00	$0.00	$65.00
101	Abbott, Dave and Sue	2	Mission Fund	2016	$125.00	$0.00	$125.00
101	Abbott, Dave and Sue	2	Mission Fund	2015	$400.00	$0.00	$400.00
101	Abbott, Dave and Sue	2	Mission Fund	2014	$100.00	$0.00	$100.00
101	Abbott, Dave and Sue	2	Mission Fund	2013	$1,375.00	$0.00	$1,375.00
101	Abbott, Dave and Sue	2	Mission Fund	2012	$50.00	$0.00	$50.00
101	Abbott, Dave and Sue	3	Youth Fund	2016	$225.00	$0.00	$225.00
101	Abbott, Dave and Sue	3	Youth Fund	2015	$75.00	$0.00	$75.00
101	Abbott, Dave and Sue	3	Youth Fund	2013	$150.00	$0.00	$150.00
101	Abbott, Dave and Sue	3	Youth Fund	2012	$225.00	$0.00	$225.00
101	Abbott, Dave and Sue	4	Building Fund	2020	$50.00	$50.00	$0.00
101	Abbott, Dave and Sue	4	Building Fund	2019	$50.00	$0.00	$50.00
101	Abbott, Dave and Sue	4	Building Fund	2018	$315.00	$0.00	$315.00
101	Abbott, Dave and Sue	4	Building Fund	2016	$125.00	$0.00	$125.00
101	Abbott, Dave and Sue	4	Building Fund	2015	$375.00	$0.00	$375.00
101	Abbott, Dave and Sue	4	Building Fund	2014	$675.00	$0.00	$675.00
101	Abbott, Dave and Sue	4	Building Fund	2013	$505.00	$0.00	$505.00
101	Abbott, Dave and Sue	4	Building Fund	2012	$1,350.00	$0.00	$1,350.00
101	Abbott, Dave and Sue	5	Vacation Bible School	2016	$50.00	$0.00	$50.00
101	Abbott, Dave and Sue	5	Vacation Bible School	2013	$250.00	$0.00	$250.00

Subgroup Export Print Save 2842

Behavior

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

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

Who

(all envelopes)

Behavior

Did not give

Find

From

1/1/2021 to 11/16/2021

☑ Include gifts-in-kind ☐ Include skipped envelopes

To the following funds Type here to search...

☑ Hide inactive funds

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

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

Subgroup Export Print Save 71

Top givers

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

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

Who

(all envelopes)

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

How many? 10

Find

Funds Type here to search...

Hide inactive funds

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

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

Subgroup Export Print Save 10

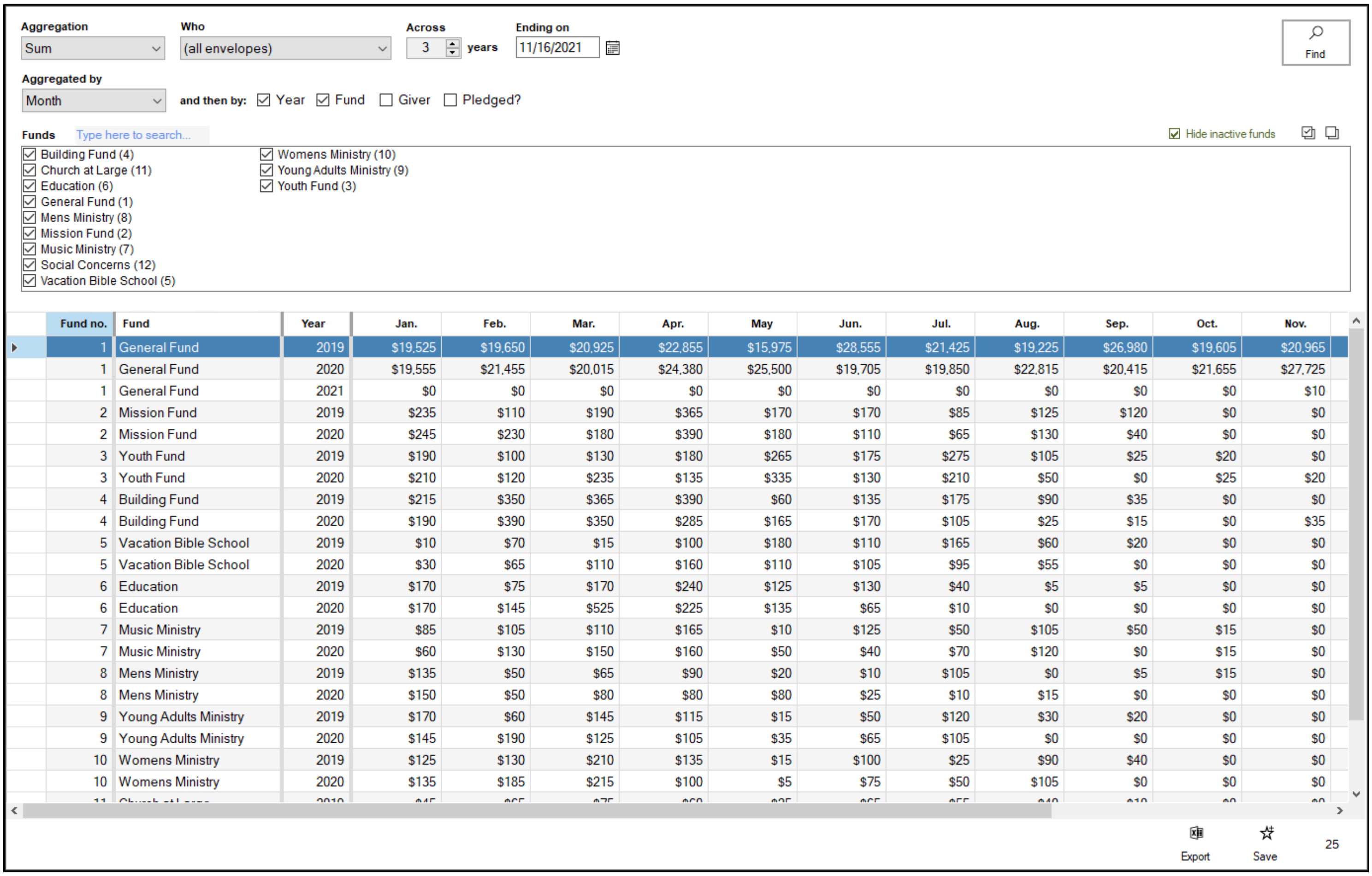
Giving Patterns

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

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

trouble finding a fund, type in the fund name in the "Type here to search box". At the far right side of the box, you can check or uncheck the "Hide inactive funds" option to either hide or show any funds that have been designated inactive.

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



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

Giving ranges

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

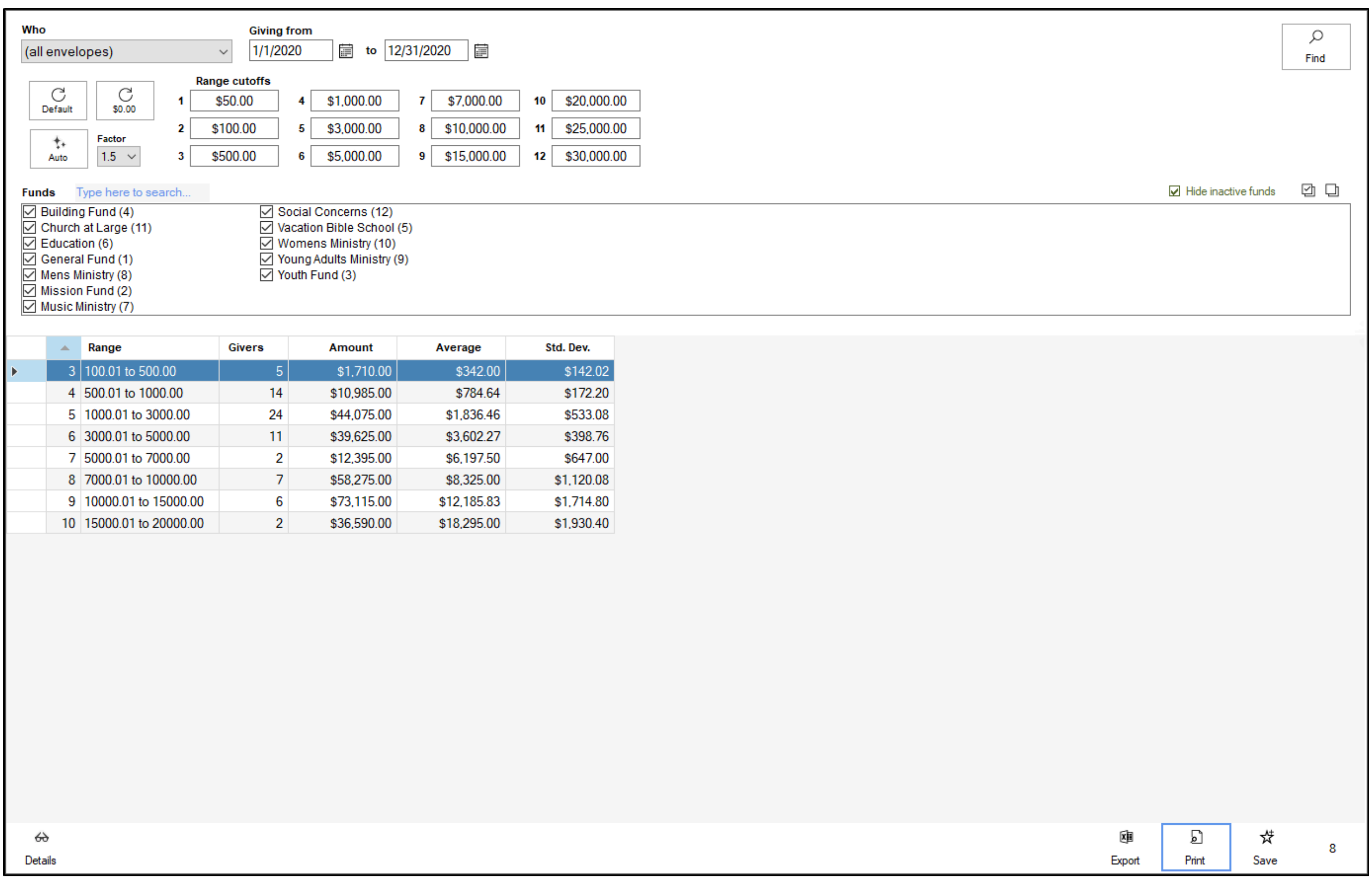
1. To access the Giving ranges view, open the Contributions module, and click on Analysis, and then click "Giving Ranges".
2. First, select which group of people this view will be looking at in the "Who" box. Options include (all envelopes), Active envelopes, Inactive envelopes and a few others as well.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

here to search" box, and the system will highlight that fund for you. You can also choose to hide or show any inactive funds by checking or unchecking the "Hide inactive funds" box on the right side of this field.

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

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

9. If you click the Print button, and select the "default" option, you will receive a report that shows each giving range, the number of givers in that range (Givers), the total amount of money given in that range (Amount), and the percentage of total giving within that time period that range represents (Pct. of total). You'll also see each giver under each range, the amount they gave, the percentage of total giving that giver's giving accounts for (Pct. of Total), and the percentage that giver's giving accounts for within the range they're in (Pct. of Range). The "Hide giver names" option will show the same information, but it will not show you the names of the givers. Finally, the "Range totals only" will just show you the totals for each giving range, not broken out by giver.



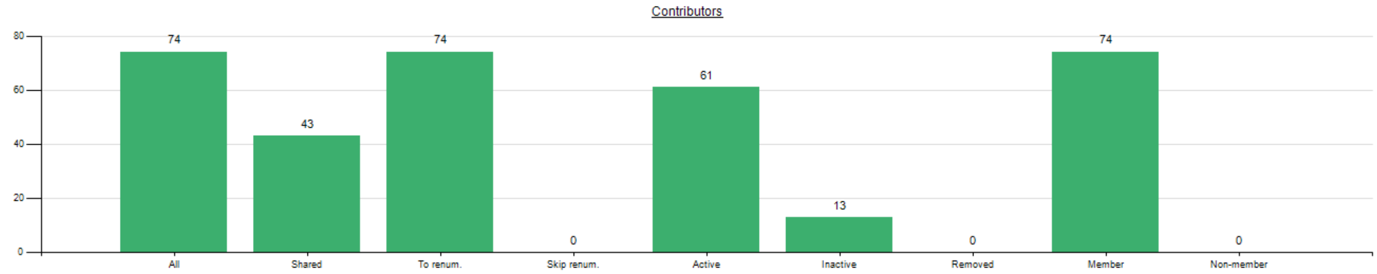
Explore by Contributors

The Contributors section of the "Explore" tab in the Contributions module of Shepherd's Staff allows you to quickly see totals of different categories of contributors, as well as see your annual giving by different groups of contributors.

1. To access the "Explore by Contributors" view, open the Contributions module, click on the "Explore" tab, and then click on the "Contributors" section.
2. This view contains two views that you can switch between in the "Show" field are:
   - By category - This view shows the total number of envelopes in different categories, such as how many shared envelopes are in your database, envelopes to be renumbered, to skip being renumbered, active, inactive, removed, member and non-member envelopes.
   - By membership, giving - This view shows your annual giving by different groups of contributors, including Members, non-members and contributions credited to loose/plate offerings
3. In the "By category view", if you want to see what envelopes are a part of each group, in the table below the graph, you can click on the category you want to know more about, and click "Givers". Click the "Summary" button to return to the first table.
4. Click "Copy" to copy the graph to the Windows Clipboard so you can copy the graph to another program, and clicking the "Export" button will export the table to your spreadsheet program

Show

By category



Category	Count
All	74
Shared	43
To renum.	74
Skip renum.	0
Active	61
Inactive	13
Removed	0
Member	74
Non-member	0

Givers

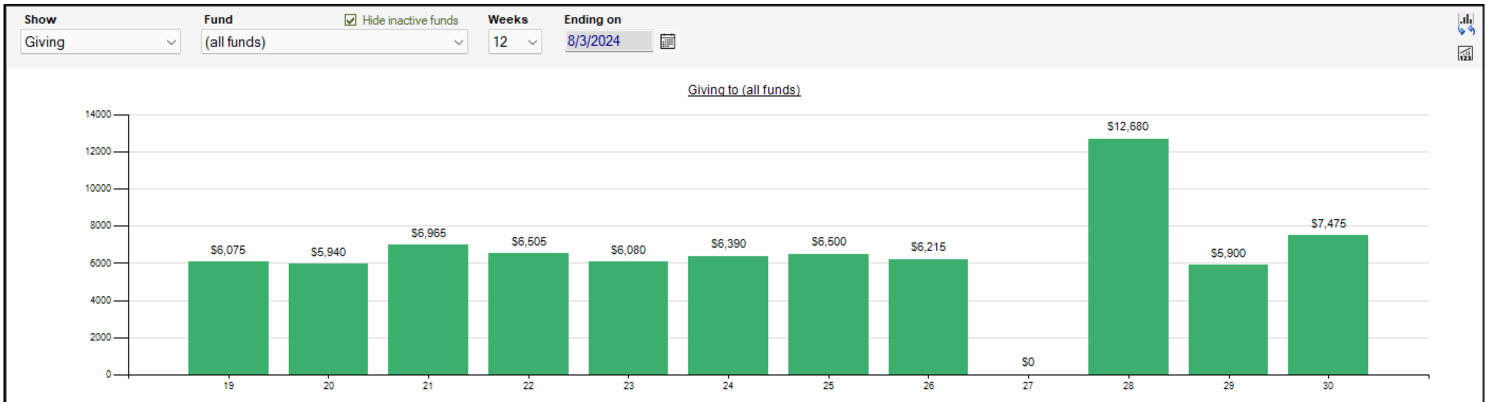
Copy

Export

Explore by Weekly Giving

The "Weekly giving" view lets you view the total giving, number of givers or amounts given to a pledge for each week over the number of weeks you select. This can be helpful for seeing week-by-week changes in giving over time.

1. To access the "Weekly giving" view, open the Contributions module, click on the "Explore" tab, and then click the "Weekly giving" section.
2. At the top of the window, you can choose from one of three views:
    - Giving - This view shows the total dollar amount of giving per week
    - Givers - This view shows the total number of givers who contributed per week
    - Given to a pledge - This view shows the total dollar amount of giving that went towards fulfilling a pledge per week
3. The "Fund field" will let you select if you want to see the giving/giver totals for all funds, or just one specific fund. Only active funds will be shown, unless you uncheck the "Hide inactive funds". box.
4. The "Weeks" field lets you select the number of weeks you want to look at at once, and the "Ending on" field lets you select what date you want to look at the weeks through.
5. The Graph will show you a column for each week, with the amount of giving or number of givers for each week.
6. The table below will show the amount of giving and number of givers for each week
7. Clicking Copy will copy the graph to the Windows Clipboard so you can paste it into another program. Clicking Export will export the table to your spreadsheet program, and clicking Print will give you a printable version of the table



Year	Month	Week	Starting	Amount	Givers
2024	July	30	7/21/2024	$7,475	51
2024	July	29	7/14/2024	$5,900	45
2024	July	28	7/7/2024	$12,680	56
2024	June	27	6/30/2024	$0	0
2024	June	26	6/23/2024	$6,215	45
2024	June	25	6/16/2024	$6,500	44
2024	June	24	6/9/2024	$6,390	46
2024	June	23	6/2/2024	$6,080	41
2024	May	22	5/26/2024	$6,505	43
2024	May	21	5/19/2024	$6,965	50
2024	May	20	5/12/2024	$5,940	44
2024	May	19	5/5/2024	$6,075	46

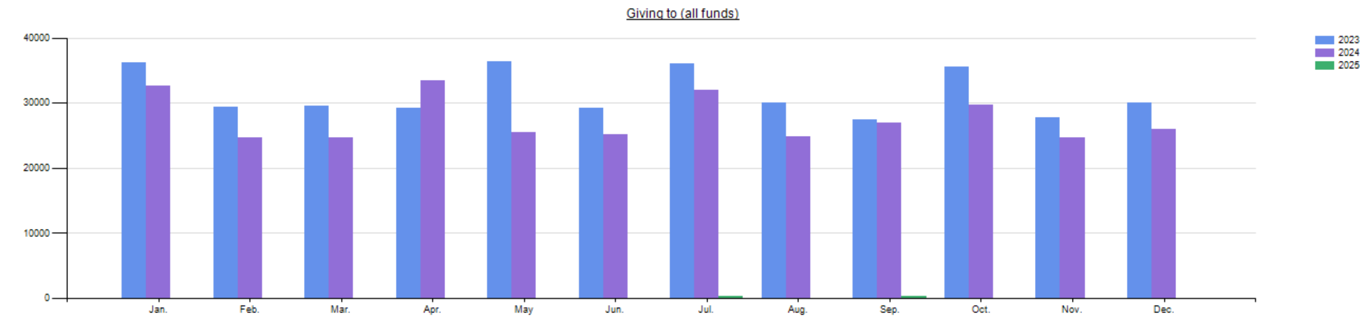
Copy Export Print Save

Explore by Monthly Giving

The "Monthly giving" view lets you view the total giving, number of givers or amounts given to a pledge for each month over the number of years you select. This can be helpful for comparing giving for the same month over multiple years.

1. To access the "Monthly giving" view, open the Contributions module, click on the "Explore" tab, and then click the "Monthly giving" section.
2. At the top of the window, you can choose from one of three views:
    - Giving - This view shows the total dollar amount of giving per month
    - Givers - This view shows the total number of givers who contributed per month
    - Given to a pledge - This view shows the total dollar amount of giving that went towards fulfilling a pledge per month
3. The "Fund field" will let you select if you want to see the giving/giver totals for all funds, or just one specific fund. Only active funds will be shown, unless you uncheck the "Hide inactive funds". box.
4. The "Years" field lets you select the number of years you want to look at at once. The "Period" field lets you select what portion of the year you want to look at. The "Ending on" field lets you select what year you want to end on for the number of years you selected.
5. The Graph will show the giving/givers for each month over the time period you selected, with each column representing one month, and each bar in that column representing each year.
6. The table shows for each month, how much was given each year, and how many givers gave during that month in each year.
7. Clicking Copy will copy the graph to the Windows Clipboard so you can paste it into another program. Clicking Export will export the table to your spreadsheet program.

Show: Giving | Fund: (all funds) | Hide inactive funds | Years: 3 | Period: full year | Ending in: 2025



Month	Given 2023	Given 2024	Given 2025	Givers 2023	Givers 2024	Givers 2025
December	$30,080	$25,970	$0	61	61	0
November	$27,740	$24,605	$0	61	61	0
October	$35,580	$29,710	$0	61	61	0
September	$27,380	$26,875	$259	61	61	3
August	$29,965	$24,835	$0	61	60	0
July	$36,000	$32,015	$350	61	61	2
June	$29,175	$25,185	$0	61	59	0
May	$36,425	$25,485	$0	61	61	0
April	$29,150	$33,415	$0	61	61	0
March	$29,505	$24,630	$0	61	61	0
February	$29,430	$24,750	$0	61	61	0
January	$36,290	$32,660	$0	61	61	0

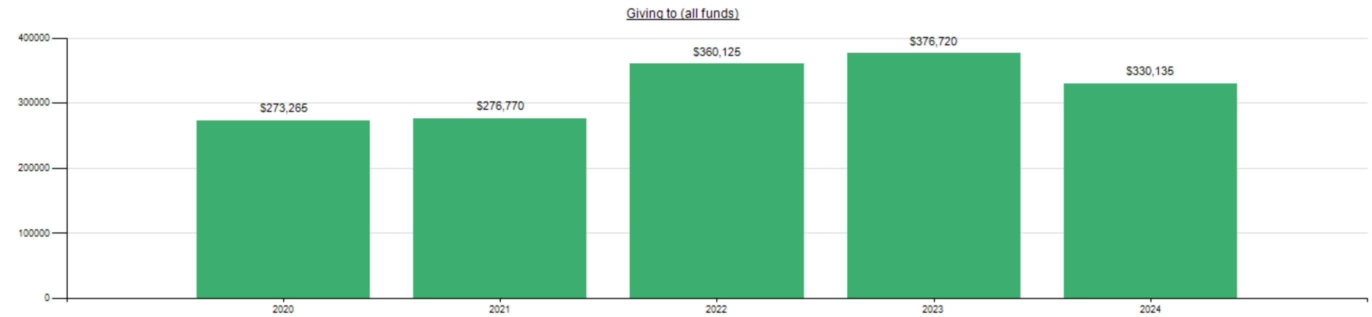
Copy Export Save

Explore by Yearly Giving

The "Yearly giving" view lets you view the total giving, number of givers or amounts given to a pledge for each year over the number of years you select. This can be helpful for comparing giving year over year to see how your congregation's giving has increased or decreased over the years.

1. To access the "Monthly giving" view, open the Contributions module, click on the "Explore" tab, and then click the "Monthly giving" section.
2. At the top of the window, you can choose from one of three views:
    - Giving - This view shows the total dollar amount of giving per year
    - Givers - This view shows the total number of givers who contributed per year
    - Given to a pledge - This view shows the total dollar amount of giving that went towards fulfilling a pledge per year
3. The "Fund" field will let you select if you want to see the giving/giver totals for all funds, or just one specific fund. Only active funds will be shown, unless you uncheck the "Hide inactive funds". box.
4. The "Years" field lets you select the number of years you want to look at at once. The "Period" field lets you select what portion of the year you want to look at. The "Ending on" field lets you select what year you want to end on for the number of years you selected.
5. The Graph will show the giving/givers for each year over the time period you selected, with each column representing one year.
6. The table shows for each year, how much was given each year, and how many unique givers gave in each year.
7. Clicking Copy will copy the graph to the Windows Clipboard so you can paste it into another program. Clicking Export will export the table to your spreadsheet program.

Show: Giving | Fund: (all funds) | Hide inactive funds | Years: 5 | Ending in: 2024



Year	Given	Givers
2024	$330,135	61
2023	$376,720	61
2022	$360,125	63
2021	$276,770	71
2020	$273,265	71

Copy Export Save

Explore by Age Group

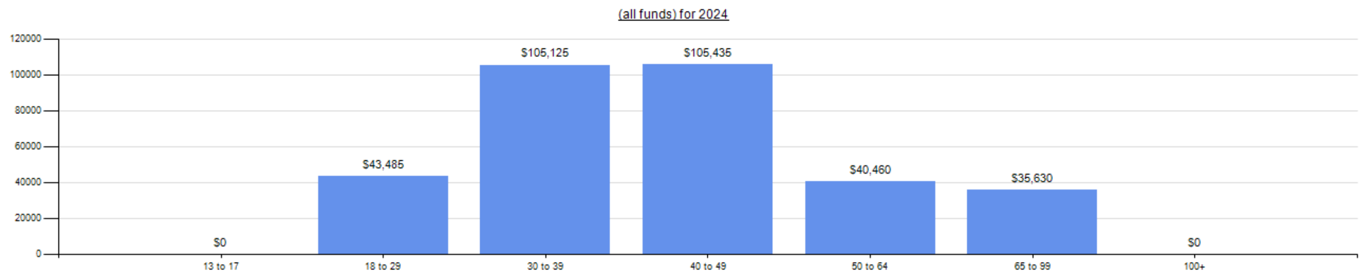
The "Age group" view lets you view the total giving and the number of givers you have during a selected year, broken up by age group. This can help you see how different age groups of people in your congregation are giving to your church.

1. To access the "Age group" view, open the Contributions module, click on the "Explore" tab, and then click the "By age group" section.
2. To select what year you want to find out more information on, in the "Year" field, you can select which year you want to view.
3. The "Giving fund" field will let you select which fund you want to see giving for by your different age groups. Only active funds will be shown, unless you uncheck the "Hide inactive funds" box.
4. The Graph will show the giving for each age group for the year you selected, each column represents a different age group.
5. The table shows each age group, the number of givers in that age group, and the amount they gave within the year you selected.
6. Clicking Copy will copy the graph to the Windows Clipboard so you can paste it into another program. Clicking Export will export the table to your spreadsheet program.

Year: 2024

Giving fund: (all funds)

☑ Hide inactive funds



Age group	Givers	Given
100+	0	$0.00
65 to 99	10	$35,630.00
50 to 64	8	$40,460.00
40 to 49	15	$105,435.00
30 to 39	17	$105,125.00
18 to 29	11	$43,485.00
13 to 17	0	$0.00

Copy Export

Contribution statements

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

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

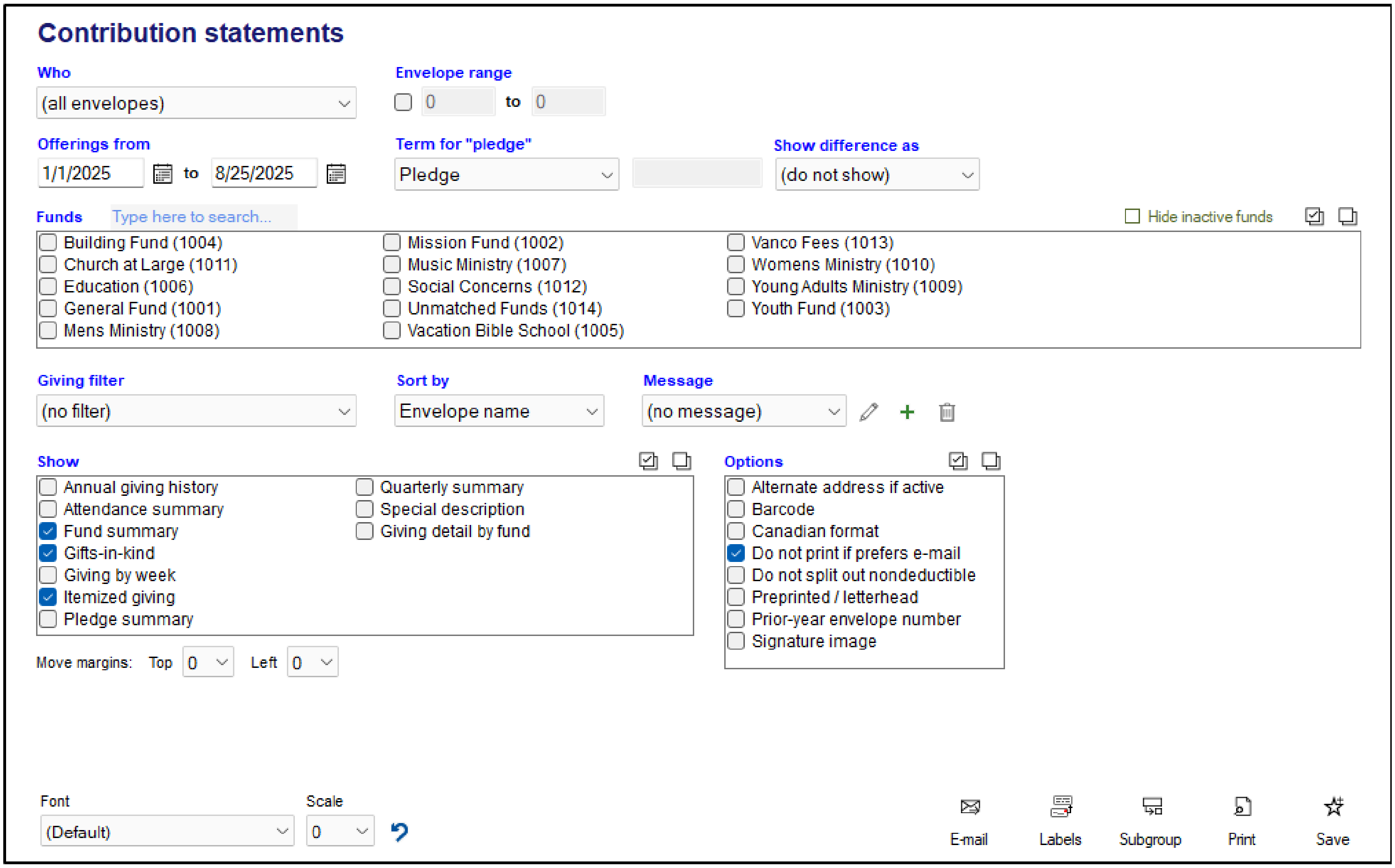
    - Those with a pledge - Only contributors who pledged to at least one of the selected funds during the selected date range will have a contribution statement prepared through this report.
    - Those behind on a pledge - Only contributors who pledged to at least one of the selected funds during the selected date range and have not fulfilled their pledge for the time period will have a contribution statement prepared through this report.
- Sort by - This field controls what order to print your contribution statements in.
    - Envelope name - This will print out your contribution statements in alphabetical order, by the last names of the contributors on each envelope.
    - Envelope number - This will print out your contribution statements in envelope number order.
    - Postal code - This will print out your contribution statements first by postal (or zip) code order then in alphabetical order by the last name of the contributors on each envelope.

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

    - Pledge summary - This option will show each pledge the contributor made during the selected time period, their pledged-to-date, any gifts-in-kind that have been applied towards that pledge, and their given-to date.
    - Quarterly summary - This will show you deductible, nondeductible, and overall totals for giving for each quarter of the year you have at the beginning of your date range. If your date range doesn't include all of a quarter, only offerings from the part of the quarter you have in your date range will be counted.
    - Special description - This option will show each individual offering given by this contributor, by date, as well as the fund and any special description on each offering record.
- Options - The options section of the contribution statements provides a few additional settings for your contribution statements. You can select any combination of these options to include in your contribution statements.
    - Alternate address if active - If this option is checked, and a contributor has an active alternate address in the membership module, instead of printing that contributor's primary address, the alternate address will be printed instead on the statement.
    - Barcode - This will allow you to print out a barcode on your contribution statements. In order for this option to generate the correct barcode for your Church, you'll need to set up Intelligent Mail Barcodes (IMB) in the "Labels" report
    - Canadian Format - This will produce an alternate version of the contribution statement that is compliant with the requirements of the Canadian Revenue Agency (CRA)
    - Do not print if prefers e-mail - This option will make it so any contributors who are designated in their contributor record as preferring to receive their statement via email will not have a contribution statement prepared by this report.
    - Do not split out nondeductible - This prints a version of the Statement that only shows the total given, with no breakout between Deductible and Nondeductible giving.
    - Preprinted / letterhead - This option will remove the return address for the church in the top portion of the contribution statement.
    - Prior-year envelope number - This option will show the contributor's previous envelope number instead of their current envelope number. This only tracks the last envelope number a contributor had, it does not go back multiple numbers.
    - Signature image - This allows for the insertion of the signature image you've uploaded in the Tools/Settings section of the Contributions module on your statement. This option is selected by default if your church is located in Canada.

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

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


Contribution statements
Who
(all envelopes)
Envelope range
0
to
0
Offerings from
1/1/2025
to
8/25/2025
Term for "pledge"
Pledge
Show difference as
(do not show)
Funds
Type here to search...
Hide inactive funds
Building Fund (1004)
Church at Large (1011)
Education (1006)
General Fund (1001)
Mens Ministry (1008)
Mission Fund (1002)
Music Ministry (1007)
Social Concerns (1012)
Unmatched Funds (1014)
Vacation Bible School (1005)
Vanco Fees (1013)
Womens Ministry (1010)
Young Adults Ministry (1009)
Youth Fund (1003)
Giving filter
(no filter)
Sort by
Envelope name
Message
(no message)
Show
Annual giving history
Attendance summary
Fund summary
Gifts-in-kind
Giving by week
Itemized giving
Pledge summary
Quarterly summary
Special description
Giving detail by fund
Options
Alternate address if active
Barcode
Canadian format
Do not print if prefers e-mail
Do not split out nondeductible
Preprinted / letterhead
Prior-year envelope number
Signature image
Move margins:
Top
0
Left
0
Font
(Default)
Scale
0
E-mail
Labels
Subgroup
Print
Save

Email Contribution Statements

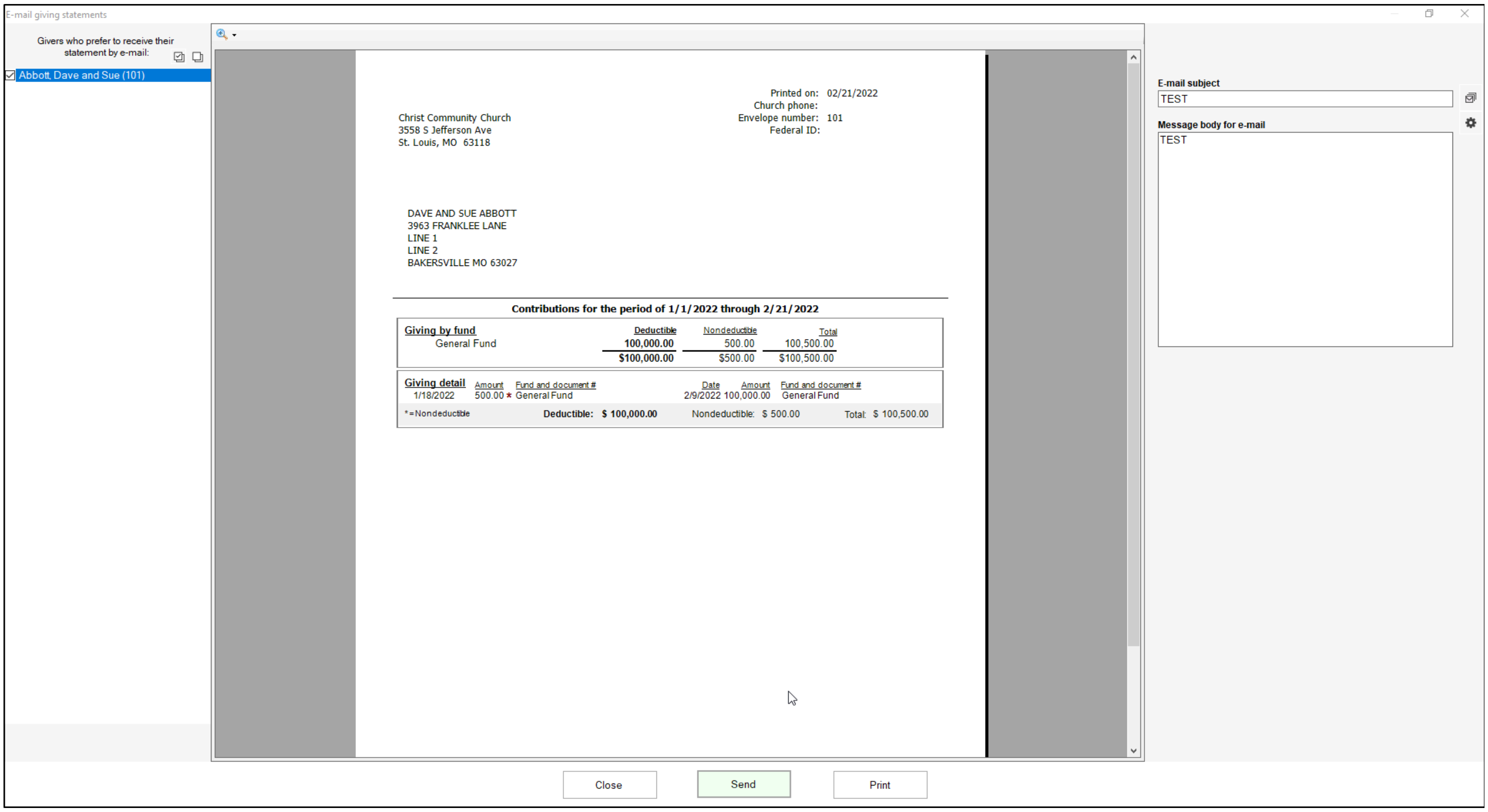
If you wish to email your contribution statements, there is a little setup involved before you can begin.

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

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

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

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


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

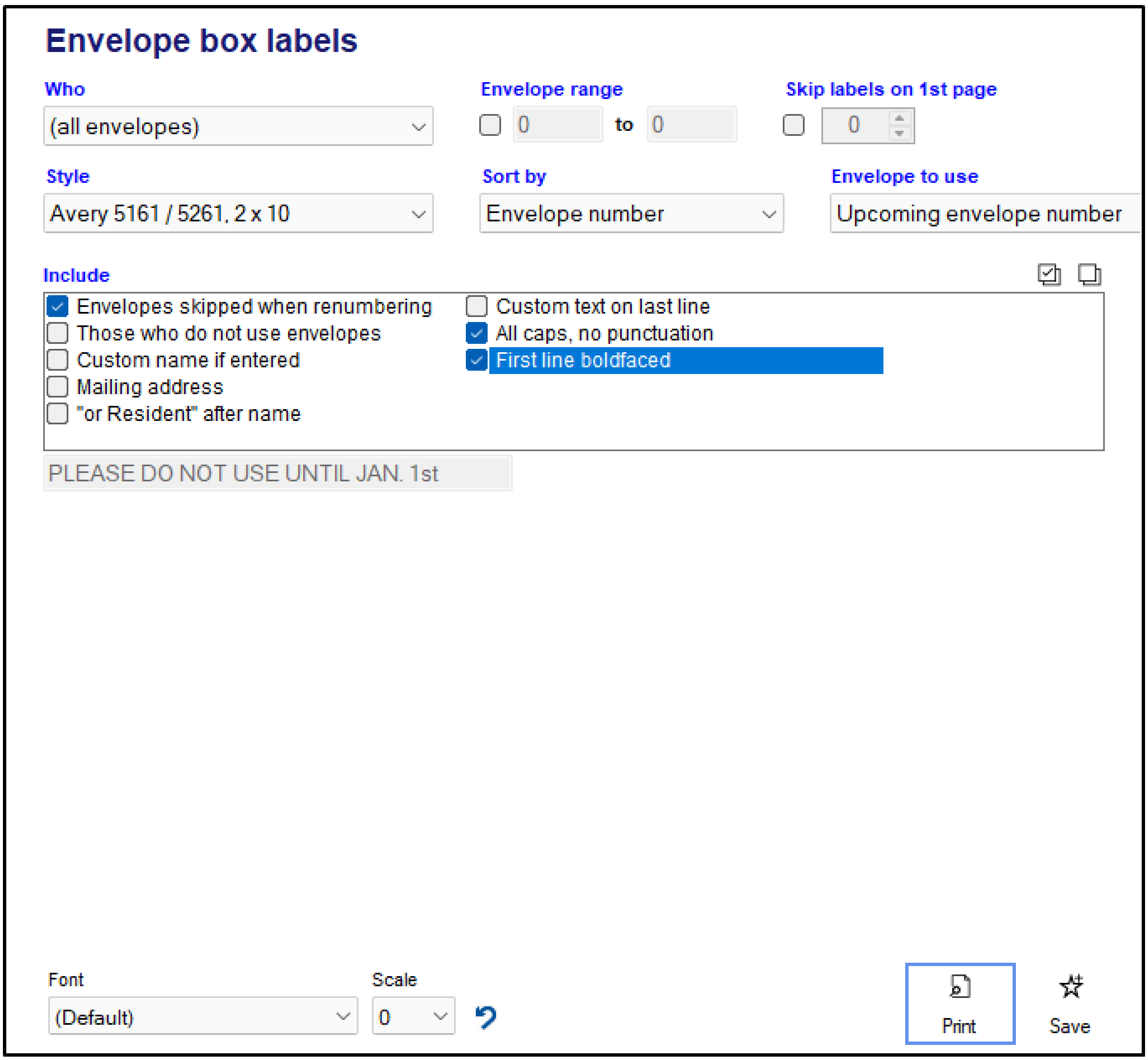
Envelope box labels

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

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

- "or Resident" after name - If checked, this will append the phrase "or Resident" to the end of each label name.
- Custom text on last line - If checked, this will allow for a custom message to be entered on the final line of each label. You can write in the text you want below the include box once this box has been checked.
- All caps, no punctuation - If checked, this option will print out your labels using all capital letters, removing any punctuation, like commas, from the label.
- First line boldfaced - If checked, this will make the first line of each label (The envelope number and name(s) of the contributor) appear using bold text.

8. Click print to generate your labels.

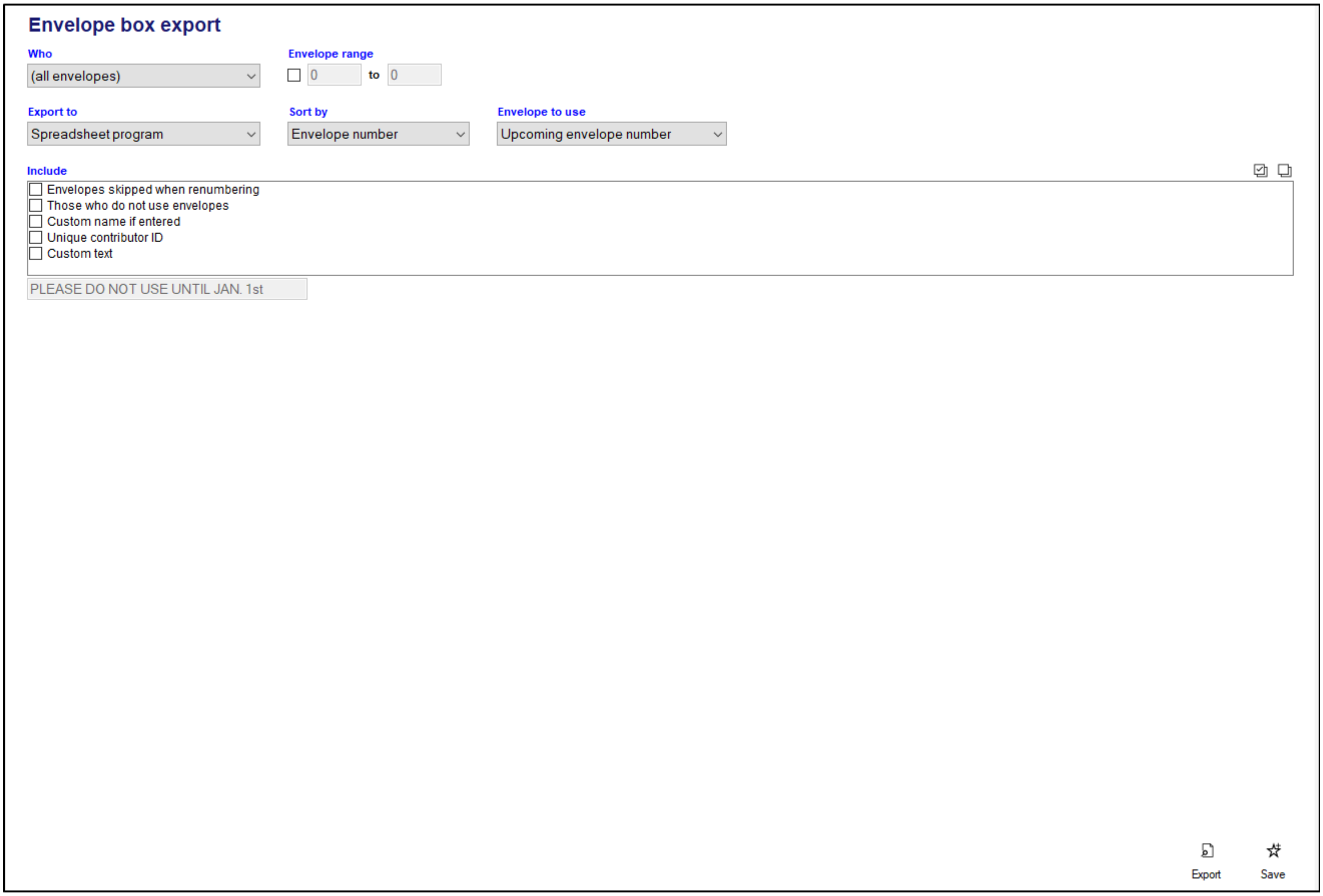


Envelope box export

The Envelope box export report is used if you order your envelopes from printing companies. This report can produce an excel or CSV file that you can then provide to your printing company to print your church's envelopes.

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

7. Click the Export option to export your report out to your spreadsheet program, or to save directly to your computer, depending on what you selected in the "Export to" field.

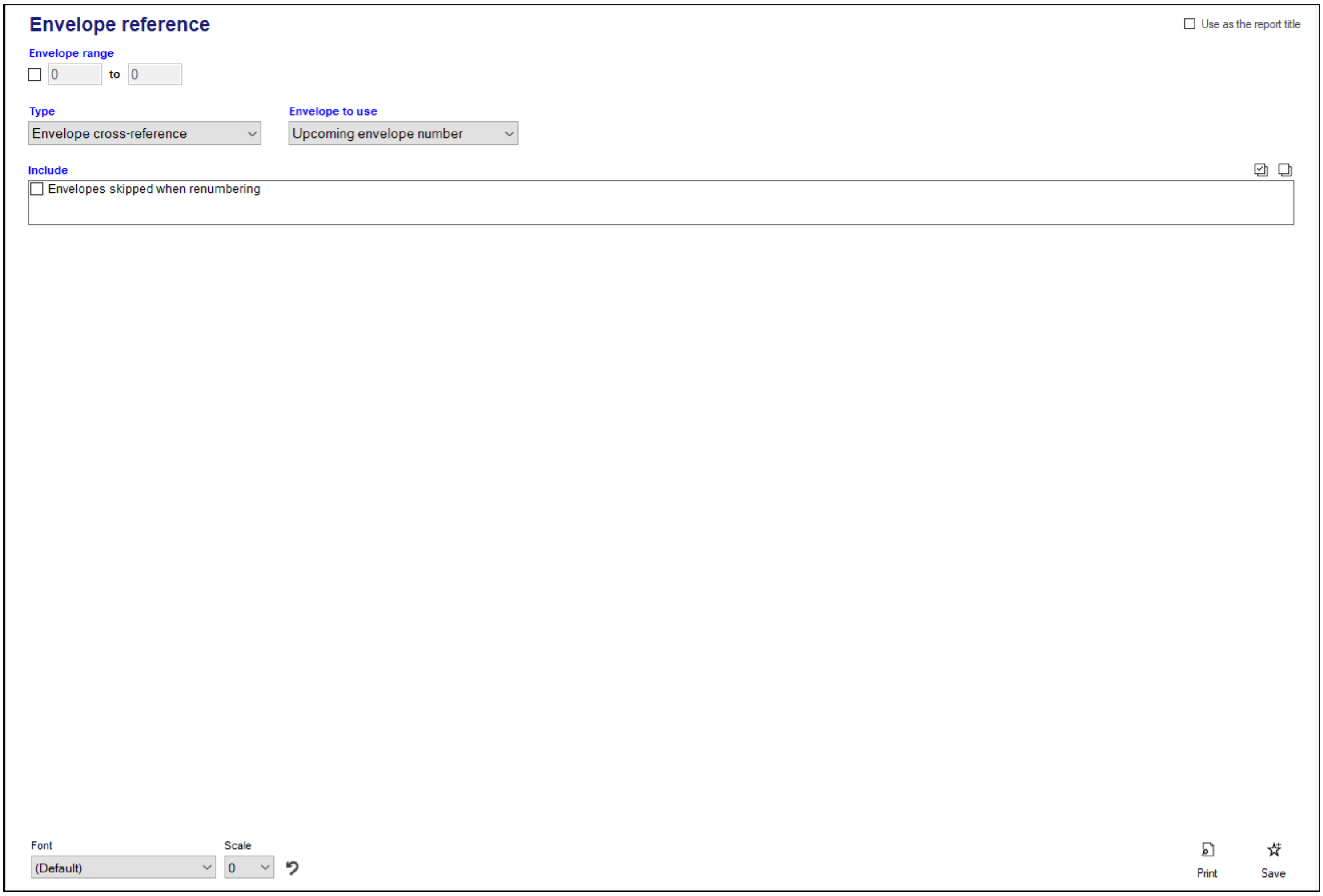


Envelope reference

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

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

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


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

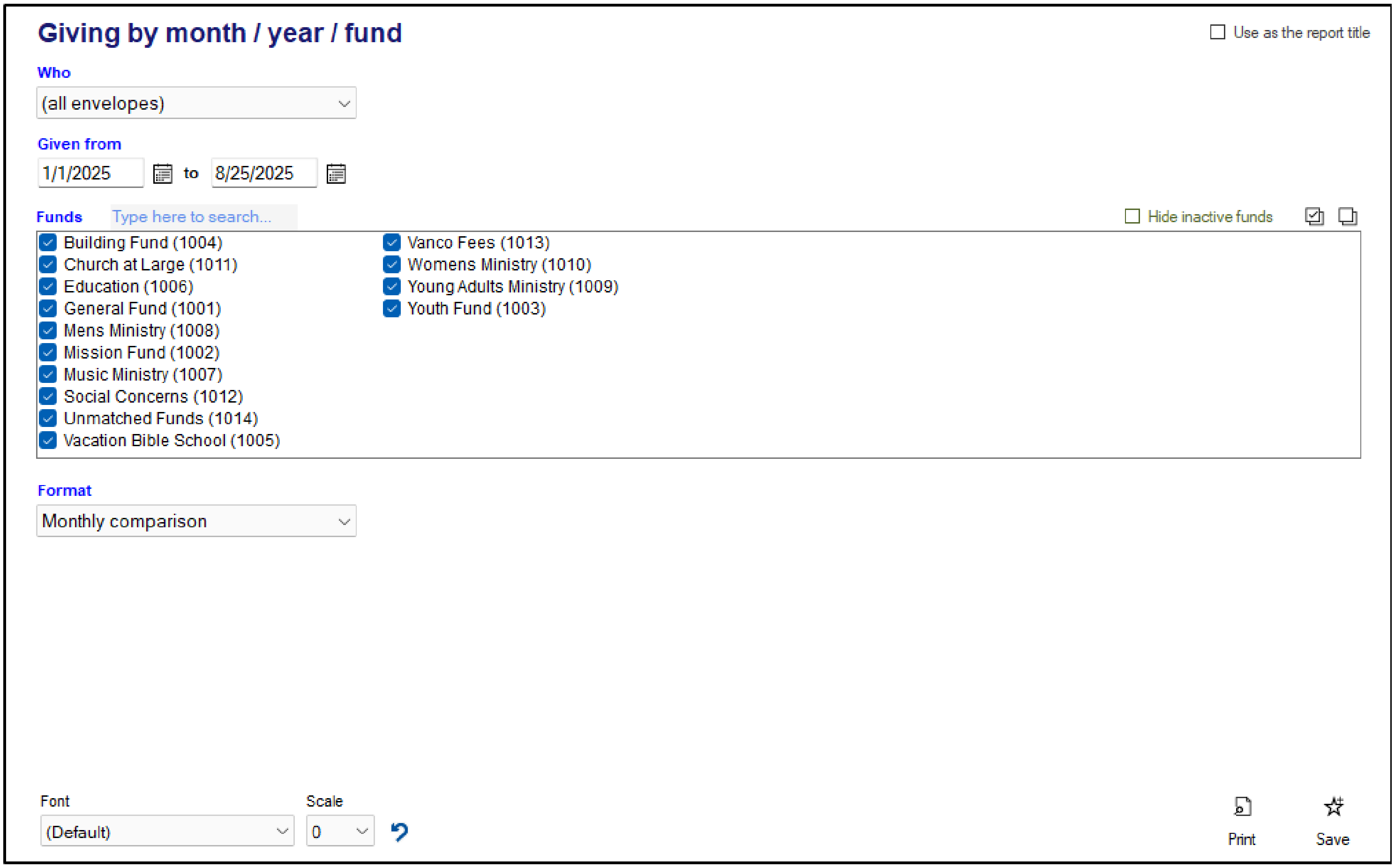
Giving by month/year/fund

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

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

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

6. Click print to generate your report.



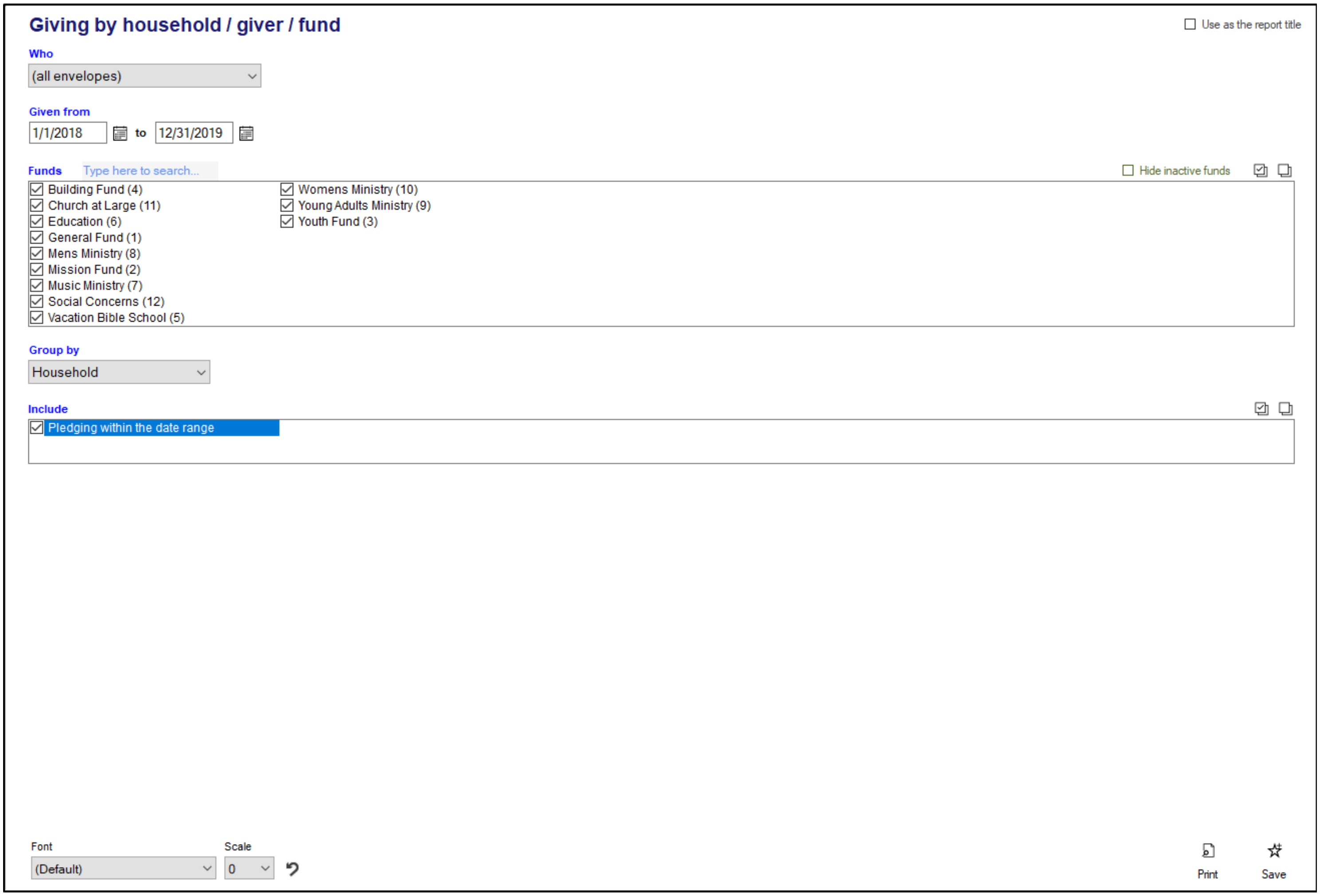
Giving by household/giver/fund

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

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

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

6. Click Print to generate your report.



Other Givers

The Other Givers Report is a report that will show you all giving records entered under the (other giver) record over the period you pick. This record is used for any giver who may only be giving one time to your church, but you want to be able to provide them with a contribution statement.

1. To access the Other Givers report, open the Contributions module, click "Other Reports" and then click "Other Reports"
2. In the "Who gave from" field, set the date range of offerrings you want to view in your report.
3. In the Sort by field, you can set how you the report sorted.
4. Click the "Print" button to generate the report.

Other givers

☐ Use as the report title

Who gave from

1/1/2025 to 7/23/2025

Sort by

Giver, date

Font

(Default)

Scale

0

Print

Save

Pledge progress

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

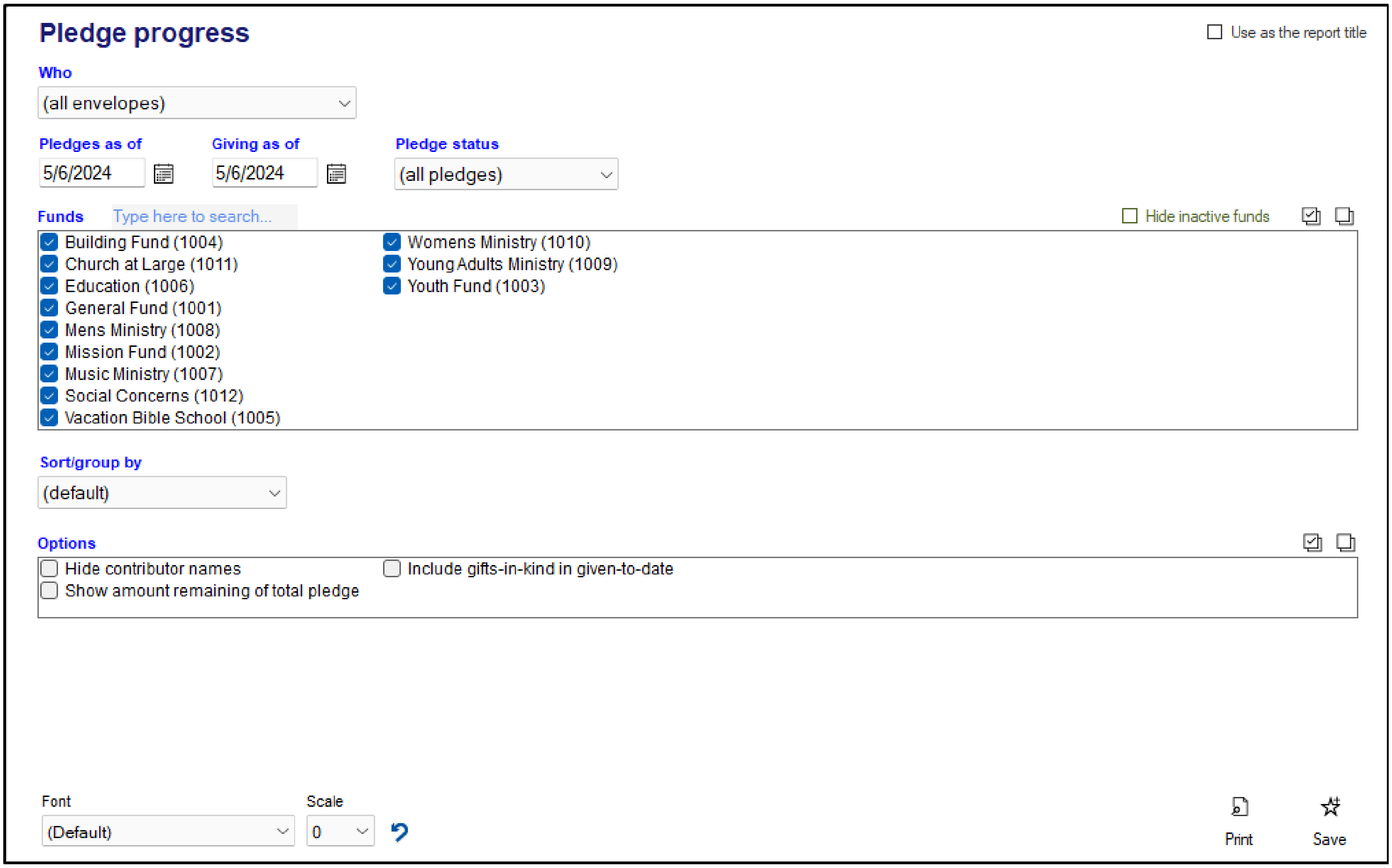
1. To access the Pledge progress report, open the Contributions module click on Other Reports, and choose "Pledge Progress"
2. Select which group of contributors you want to consider for this report in the "Who" box. Options include (all envelopes), Active Envelopes, Inactive envelopes, among others.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

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

6. Select which funds you would like to include on your report in the "Funds" box. Check off only the funds you'd like to include on the report. If you're having trouble finding a particular fund, start typing the fund name in the "Type here to search..." box, and the fund will be highlighted. If you don't want to see any inactive funds in the list, make sure you check the "Hide inactive funds" box.
7. The Sort/Group by field controls how your report will be sorted and grouped:
    - (default) - Prints your report in alphabetical order by giver name, with one line per pledge.
    - Giver - Prints your report, grouped by contributor, showing a subtotal for each pledge that contributor has made.
    - Fund, giver - Prints your report, grouped by fund, showing each contributor, sorted by envelope name who made a pledge during the date range of the pledge as their own line.
    - Fund, given-to-date - Prints your report, grouped by fund, showing each contributor sorted by "Given as of" from least to greatest.
    - Fund, pledged-to-date - Prints your report, grouped by fund, showing each contributor sorted by "Pledged as of" from least to greatest.
    - Fund, ahead/behind - Prints your report, grouped by fund, showing each contributor, sorted by "Ahead/behind" from least to greatest.
    - Fund, percentage - Prints your report, grouped by fund, showing each contributor, sorted by "Percentage" from least to greatest
8. The options section contains a few options. First, you can hide contributor names and just show envelope numbers by checking the "Hide contributor names" box. The next option is to "Show amount remaining of total pledge". This will provide an additional column that will show how close a person is to fulfilling their total pledge. This option may automatically get checked or unchecked, depending on what

options are used in the Pledge Status field. The last option is to "Include gifts-in-kind in given-to-date". This option will add any gifts-in-kind applied towards a pledge up through the "Given as of" date. If selected, the report header will include a line to indicate that gifts-in-kind are included in the "Given as of"

9. Click print to start generating your report.



Pledge mail merge

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

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

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

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

Pledge mail merge

☐ Use as the report title

Who

(all envelopes)

Pledges as of 11/18/2021

Giving as of 11/18/2021

Pledge status (all pledges)

Funds Type here to search...

☐ Hide inactive funds

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

Sort by Envelope name

Export to Spreadsheet program

Options

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

Font (Default)

Scale 0

Export

Save

Customize Field Names

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

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

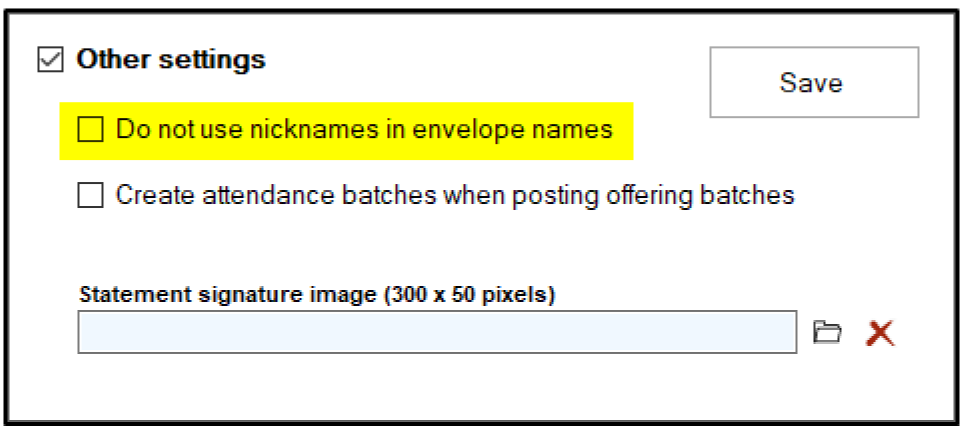
1. To access the Customize Field Names section, open the Contributions module, click on Tools/Settings and check the box for "Customize field names"
2. In the "Field" box, select which field you'd like to make a change to. When you select the field, the current field name will appear in the "Change to"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

Do not use nicknames in envelope names

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

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

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

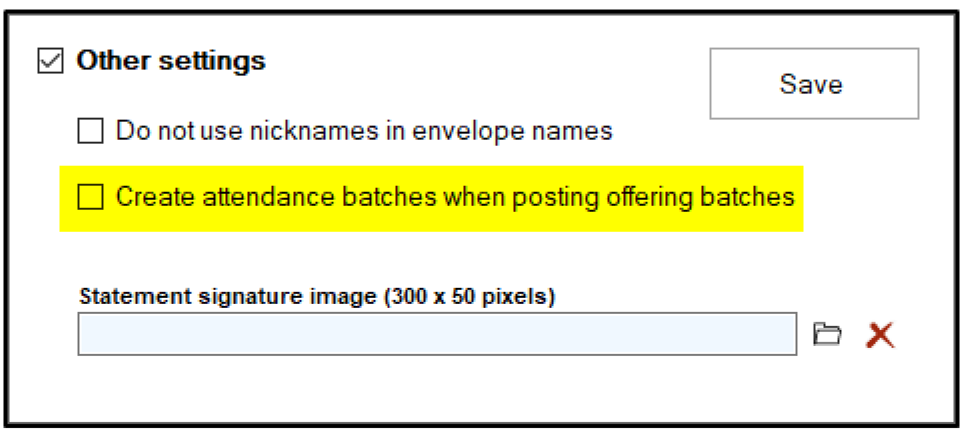


Create attendance batches when posting offering batches

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

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

1. To turn on the "Create Attendance Batches when Posting Offering Batches" option, open the Contributions module and then click on the "Tools/Settings" tab
2. Check the checkbox for "Other settings"
3. Check the checkbox for "Create attendance batches when posting offering batches"
4. Click "Save"

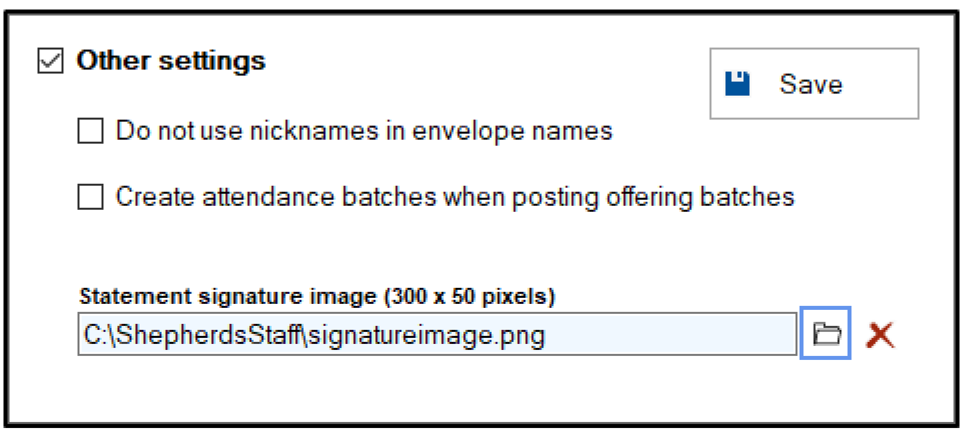


Statement signature image

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

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

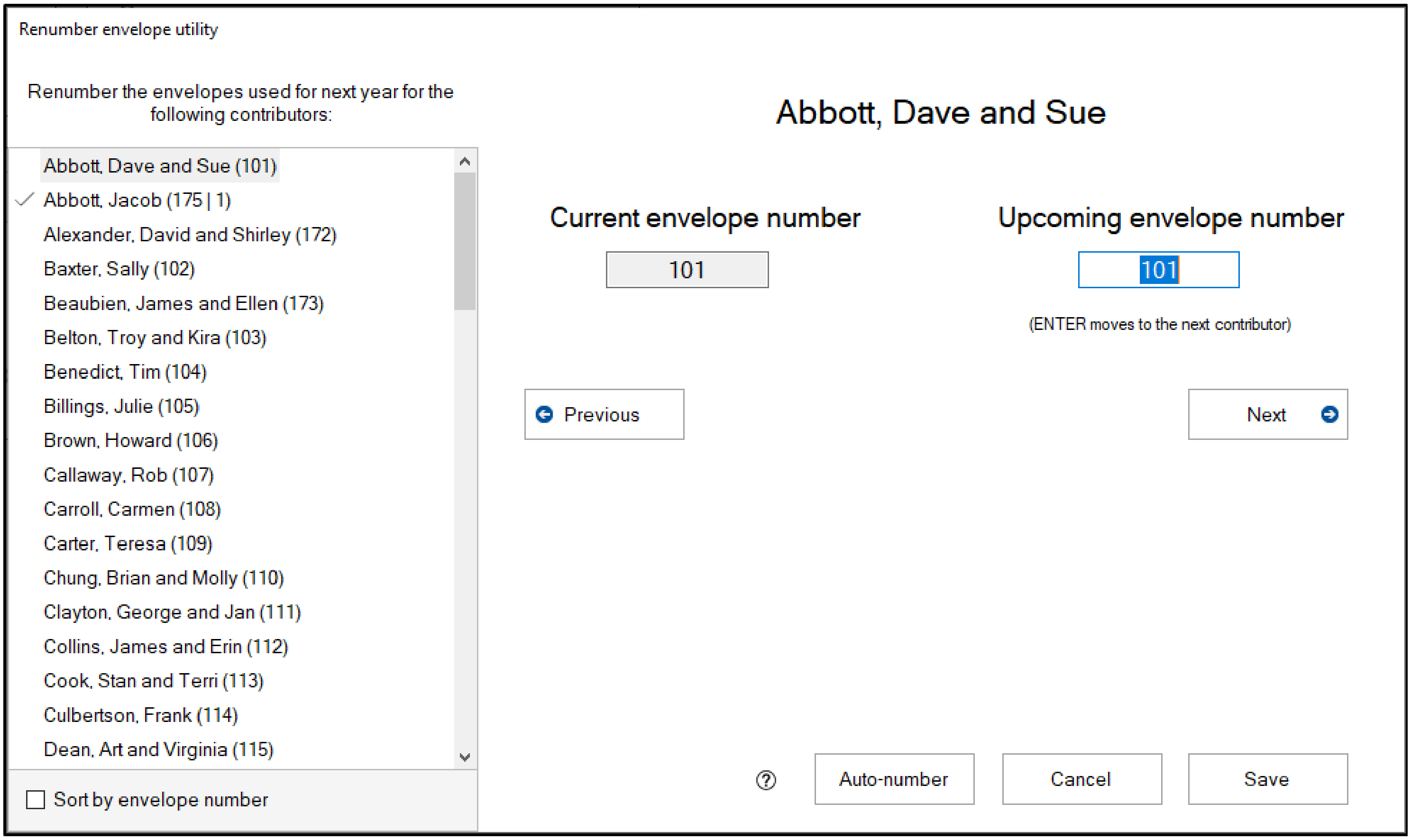
1. To upload a signature image, open the contributions module, and click on "Tools/Settings"
2. Check the checkbox for "Other Settings"
3. Click the Folder icon to open a file explorer window where you can navigate through your computer to find your image.
4. Once you've found the image, click on it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



Renumber Envelopes

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

1. To access the "Renumber Next Year envelopes" utility, open the contributions module and go to Tools/Settings. Then, under Envelope tools, select "Renumber Next Year envelopes" and click "Start".
2. In the window that appears, you'll see each of your contributors in the left column, with the exception of anyone who you have designated to "Skip this envelope when renumbering", or "Does not use physical envelopes" in their Contributor record. For those who were set to be skipped, their name and their envelope number will both be unavailable in this view. For those who were set to "Does not use physical envelopes", their name will be unavailable in this view, but their previous envelope number will be available to be reassigned to someone else, since they will not need it. If you prefer to have this column sorted by envelope number instead of name, check the "Sort by envelope number" box at the bottom of the window.
3. When you select a contributor, you'll see two boxes. The first box is the contributor's "Current envelope number", and this cannot be changed here. The second box is "Upcoming envelope number", and this number represents what the contributor's next scheduled envelope number will be, and this is the number you can make changes to.
4. After you've made a change to the first envelope you want to work with, press the enter key on your keyboard to move to the next contributor. You can also do this by clicking the "Next" button. If you need to move back to a previous contributor, click the "Previous" button.
5. After you've updated each contributor, click the "Save" button at the bottom of the window.
6. If you prefer to use the Autonumber utility, please visit this article for more information.


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

Autonumber Envelopes

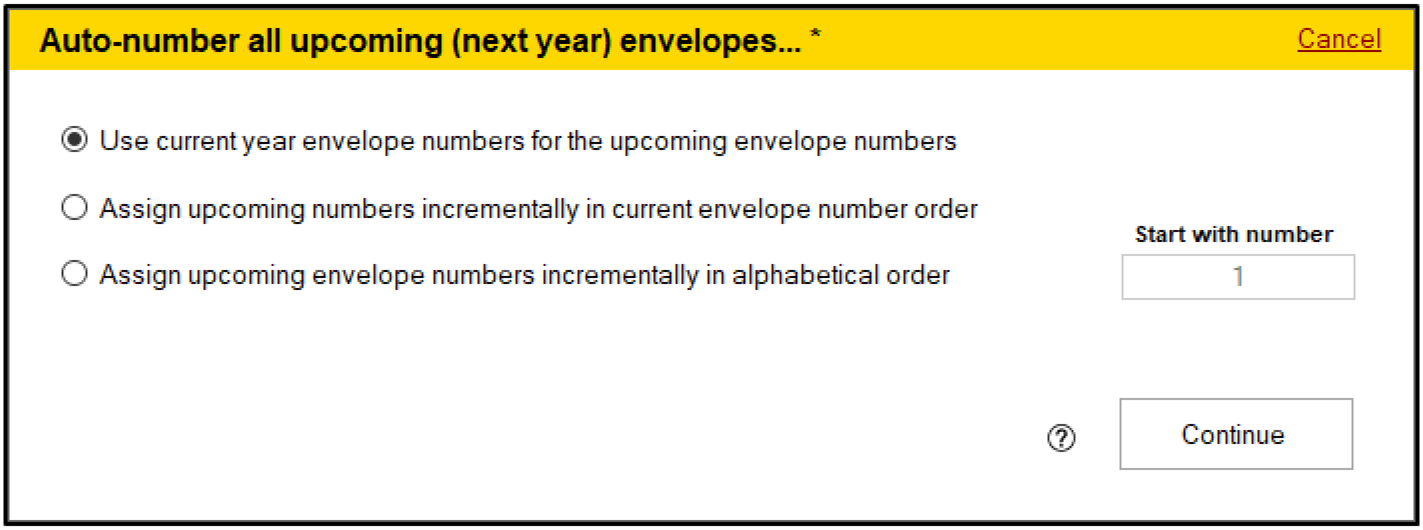
Renumbering envelopes for the next year is a common task that many churches will perform at the end of the year. While you do have the option of manually assigning envelope numbers for next year, it can save your church time to have Shepherd's Staff automatically assign envelope numbers for next year.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

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

John. Those who have been designated as not receiving a physical envelope will instead receive a number in the 100,000 range, indicating they do not have a current envelope number.

- Assign upcoming envelope numbers incrementally in alphabetical order - This option will reassign envelope numbers, starting from the number you enter in the "Start with number" box, alphabetically by last name. Those who have been marked as not receiving a physical envelope, instead of receiving a number in the sequence this utility uses, will instead be assigned an envelope number in the 100,000 range, indicating they do not have a current envelope number.

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

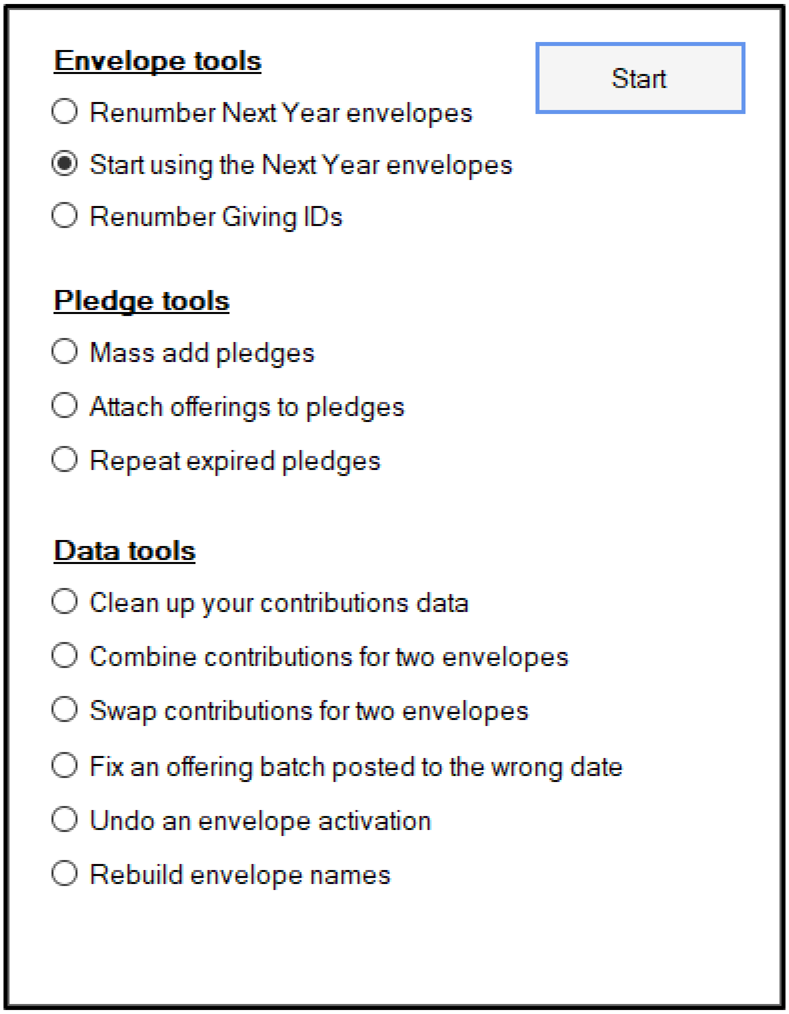


Start using the Next Year envelopes

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

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

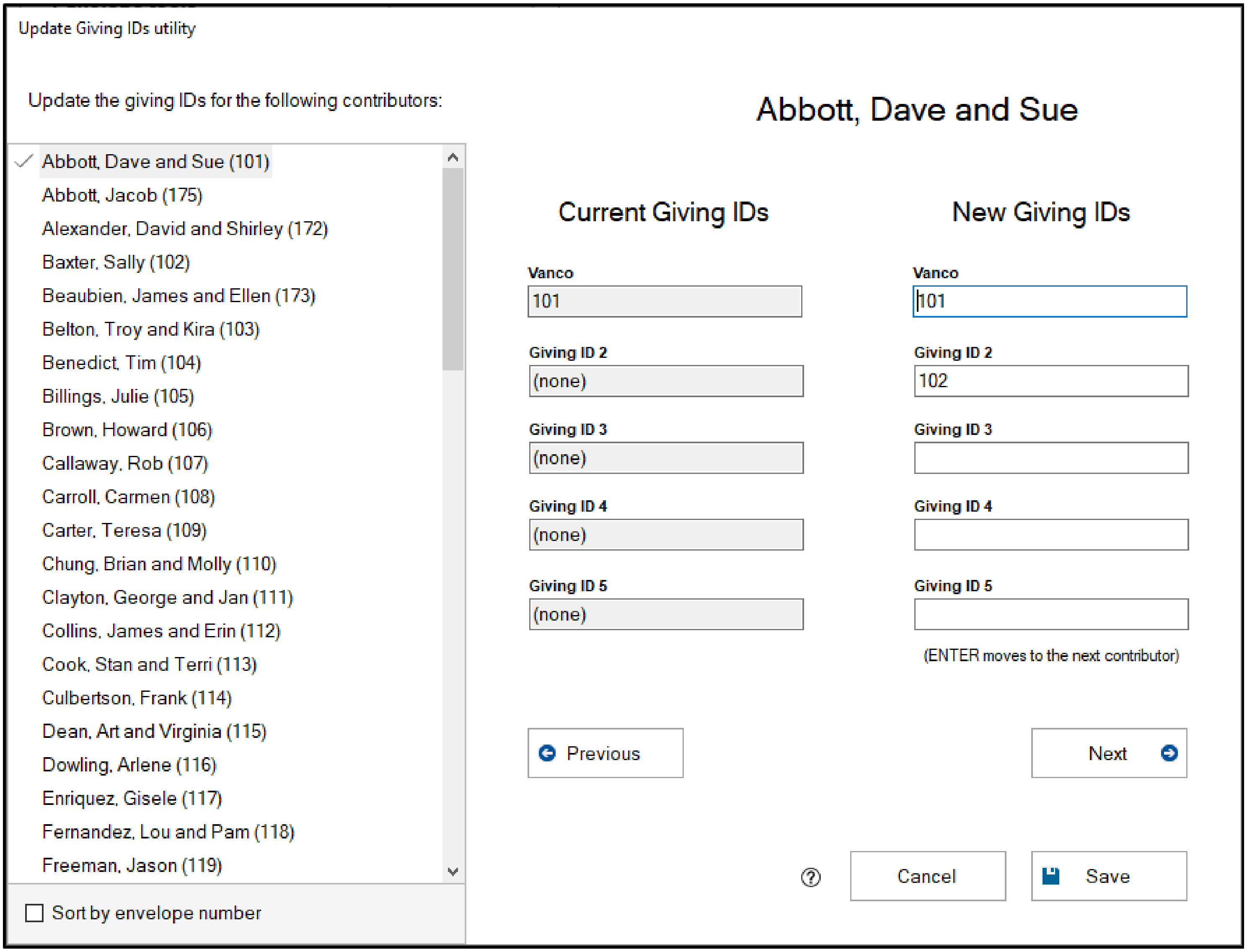
1. Before running this utility, make sure that you've made a backup of your data. This will make it much easier to recover your previous envelope numbers if needed.
2. To access the "Start using the Next Year envelopes" utility, open the Contributions module, and click on "Tools/Settings"
3. Select "Start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


Envelope tools
Start
Renumber Next Year envelopes
Start using the Next Year envelopes
Renumber Giving IDs
Pledge tools
Mass add pledges
Attach offerings to pledges
Repeat expired pledges
Data tools
Clean up your contributions data
Combine contributions for two envelopes
Swap contributions for two envelopes
Fix an offering batch posted to the wrong date
Undo an envelope activation
Rebuild envelope names

Renumber Giving IDs

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

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


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

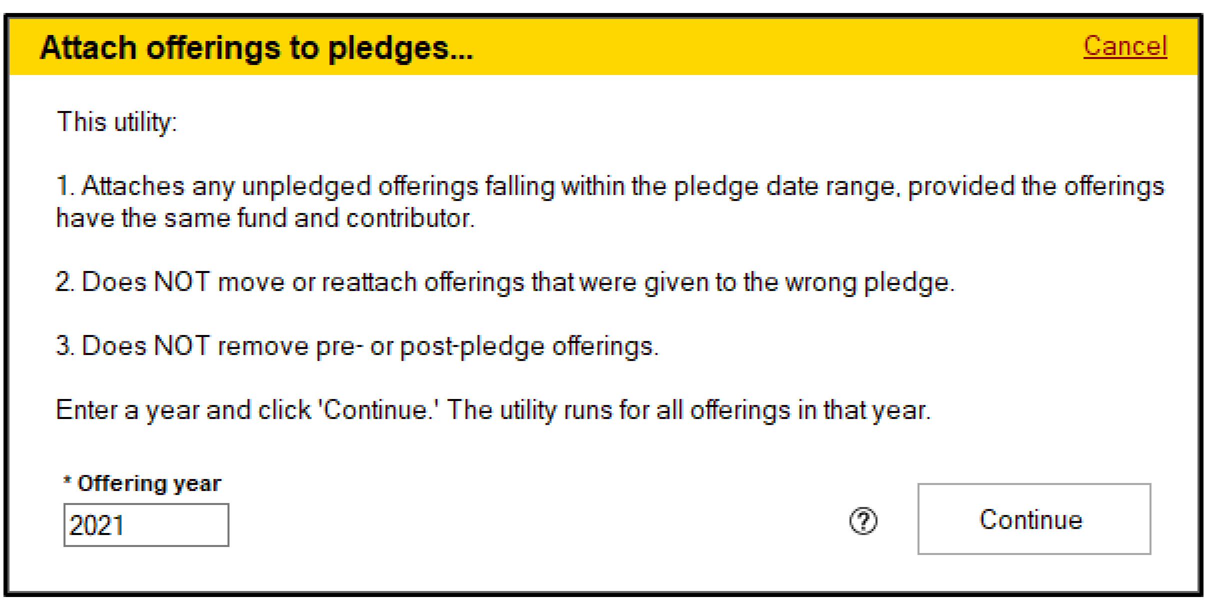
Attach offerings to pledges

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

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

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

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

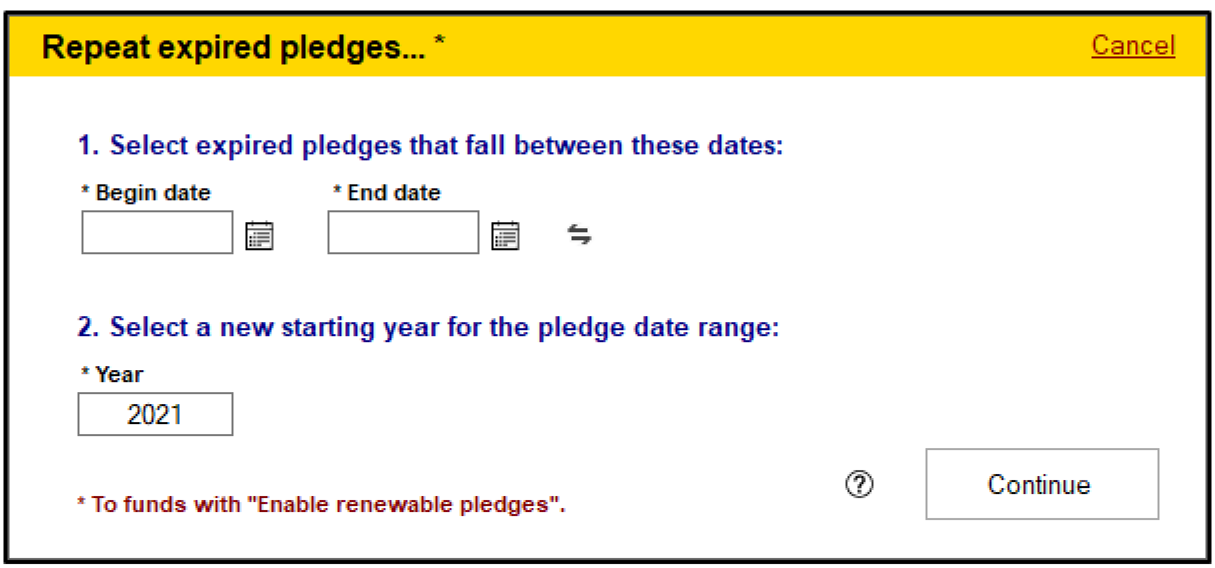


Repeat Expired Pledges

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

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

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

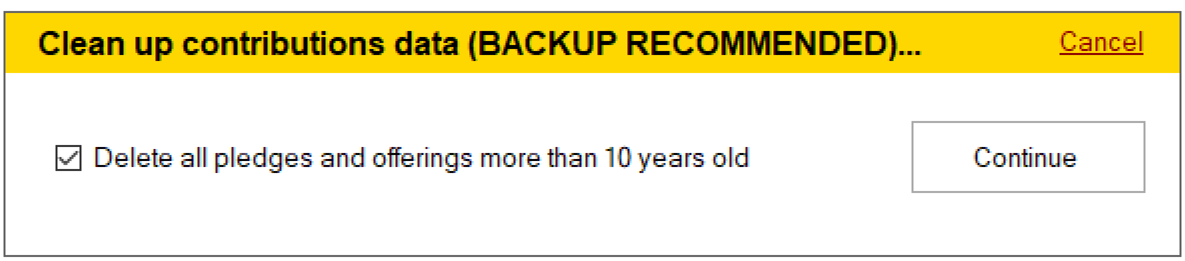


Clean up your contributions data

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

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

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



Combine contributions for two envelopes

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

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

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

Combine contributions/pledges for two envelopes Cancel

This utility moves offerings and pledges from one envelope to another, combining the offerings/pledges with any existing offerings/pledges for that second contributor.

(Note: Gifts-in-kind must be manually transferred by changing the contributor name.)

1\. **Step 1: Select the giver for which offerings/pledges should be moved.**

2\. **Step 2: Select the giver that is supposed to have these offering/pledge records.**

3\. Continue — **Step 3: Click 'Continue' to move the offerings/pledges from the first giver to the second giver, combining that data with any existing offerings/pledges for the second Envelope.**

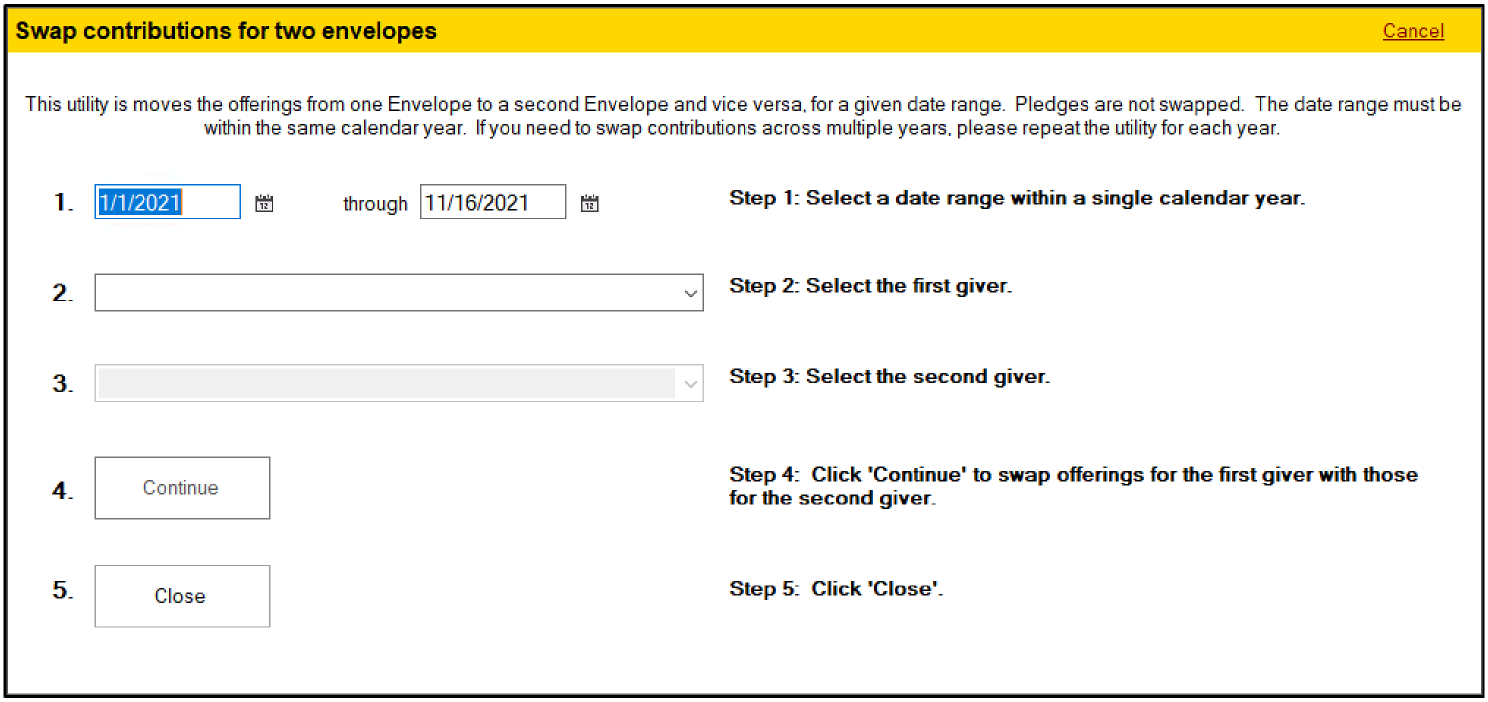
4\. Close — **Step 4: After closing this utility, we recommend that you verify the data for the second giver, especially any pledges.**

Swap contributions for two envelopes

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

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

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


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

Fix an offering batch posted to the wrong date

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

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

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

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

Fix the date of a posted batch...

Cancel

Choose a posted batch from the grid and correct the date.

Batch date	Last updated by	Posted date	Offering count
10/24/2021		10/29/2021	55
1/3/2021	SYSADMIN	10/29/2021	66

* Corrected date

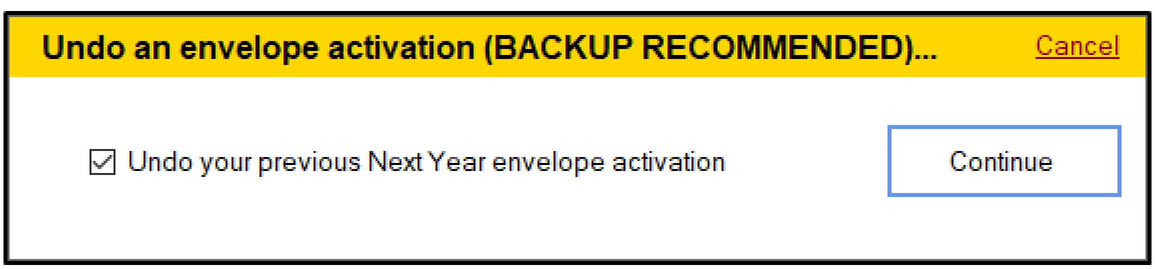
Continue

Undo an envelope activation

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

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

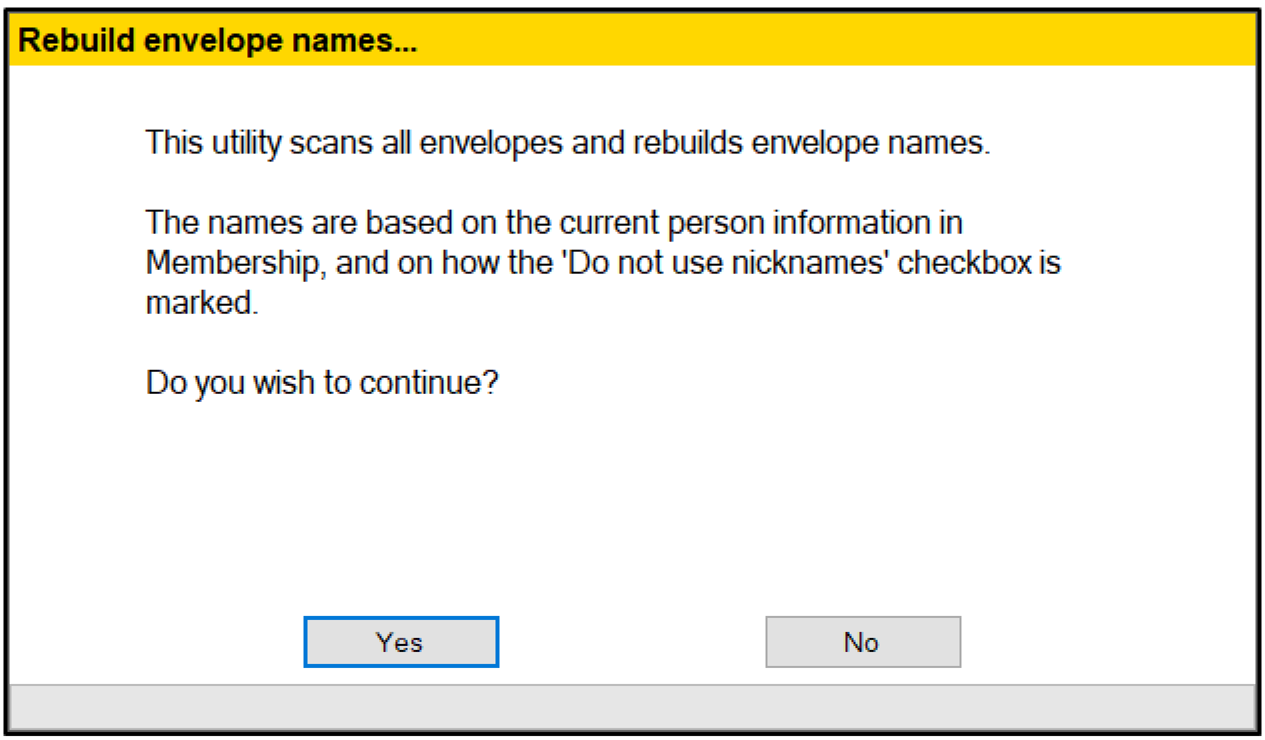
1. Before running this utility, make sure you've made a backup of your data. You will not easily be able to undo this utility without restoring a backup from before you ran this utility.
2. To access the "Undo an envelope activation" utility, open the Contributions module and click on "Tools/Settings"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



Rebuild envelope names

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

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



Accessing WebTools

Overview

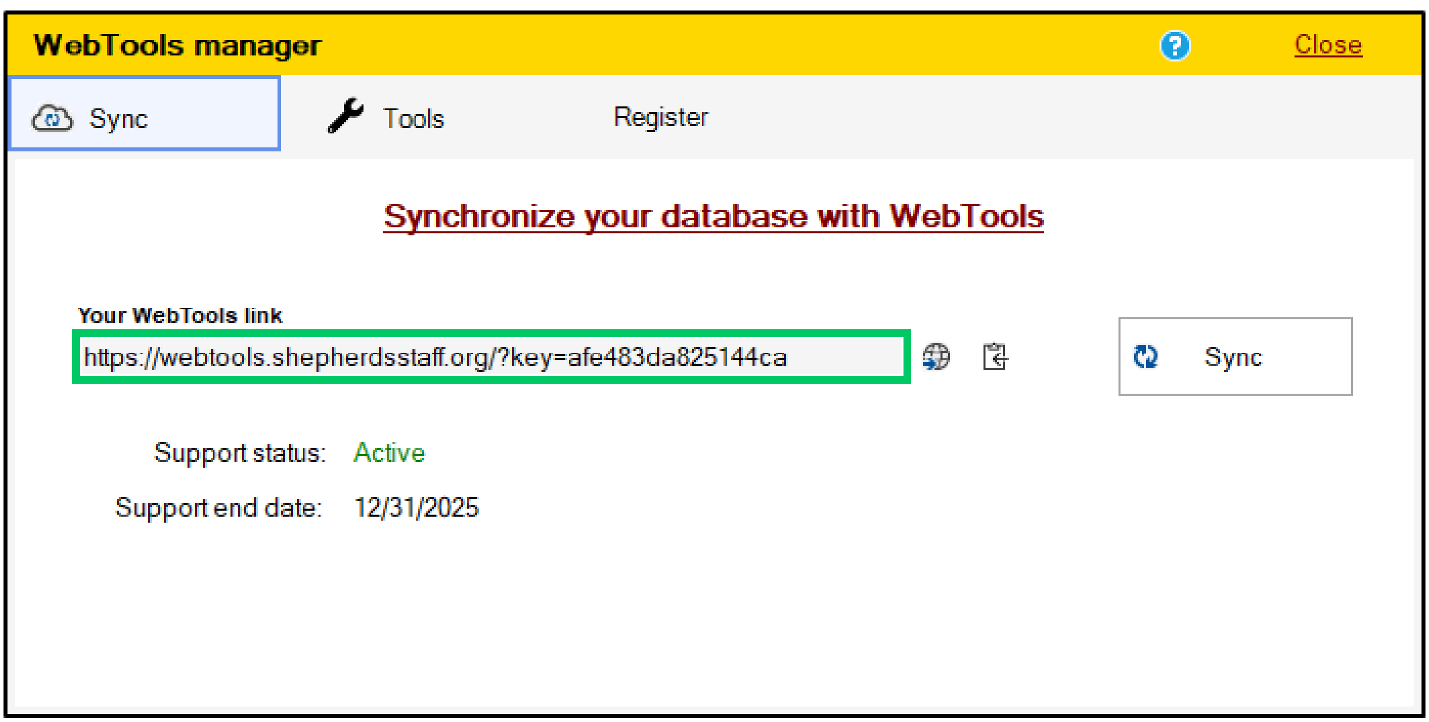
Every Shepherd's Staff® customer who has an active support contract has the option of accessing their own secure WebTools site. The data kept in WebTools is safe, and only those individuals with a login to your Shepherd's Staff database can access your WebTools site. Keep your WebTools URL handy because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

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

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

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

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



When you go to that site, you will get the below login screen where you will enter your Shepherd's Staff username and password.

Entering Contributions

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

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

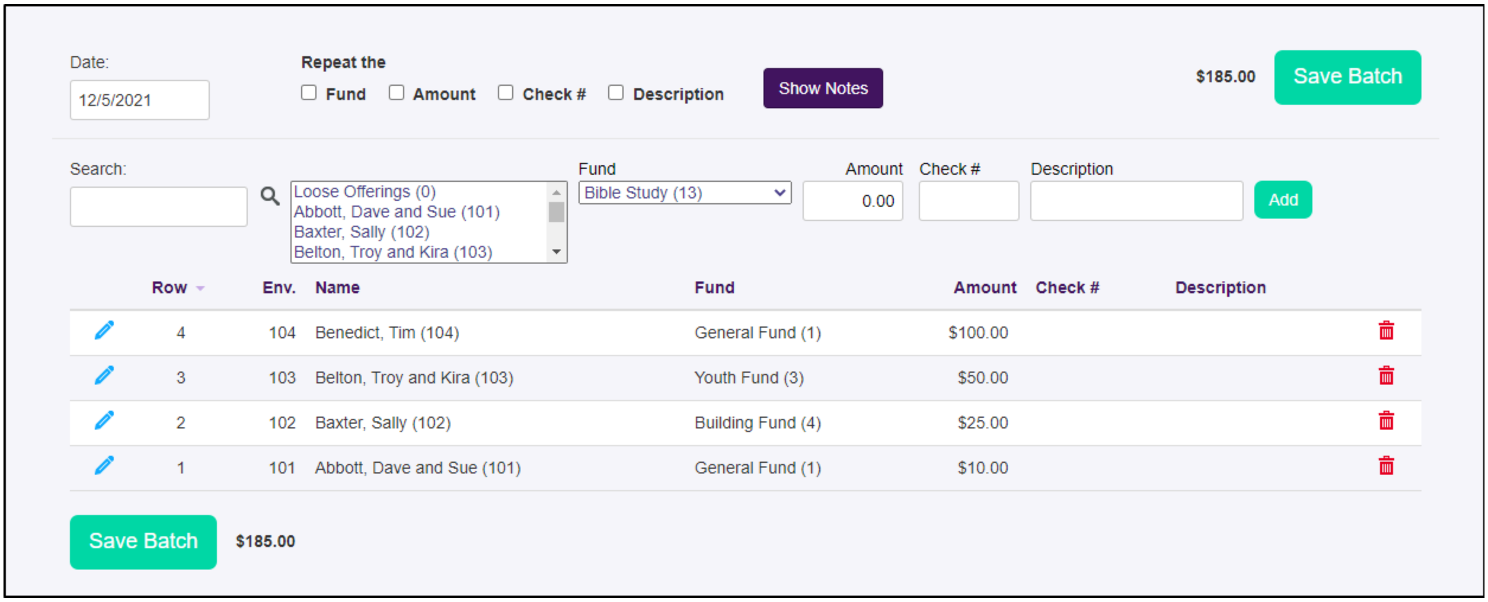
» Repeating: These options can be selected if you are entering several lines with the same information. By checking the Fund box it will automatically select the same fund for each line you add.

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

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

To enter Contributions:

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


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

Editing a Batch in Webtools

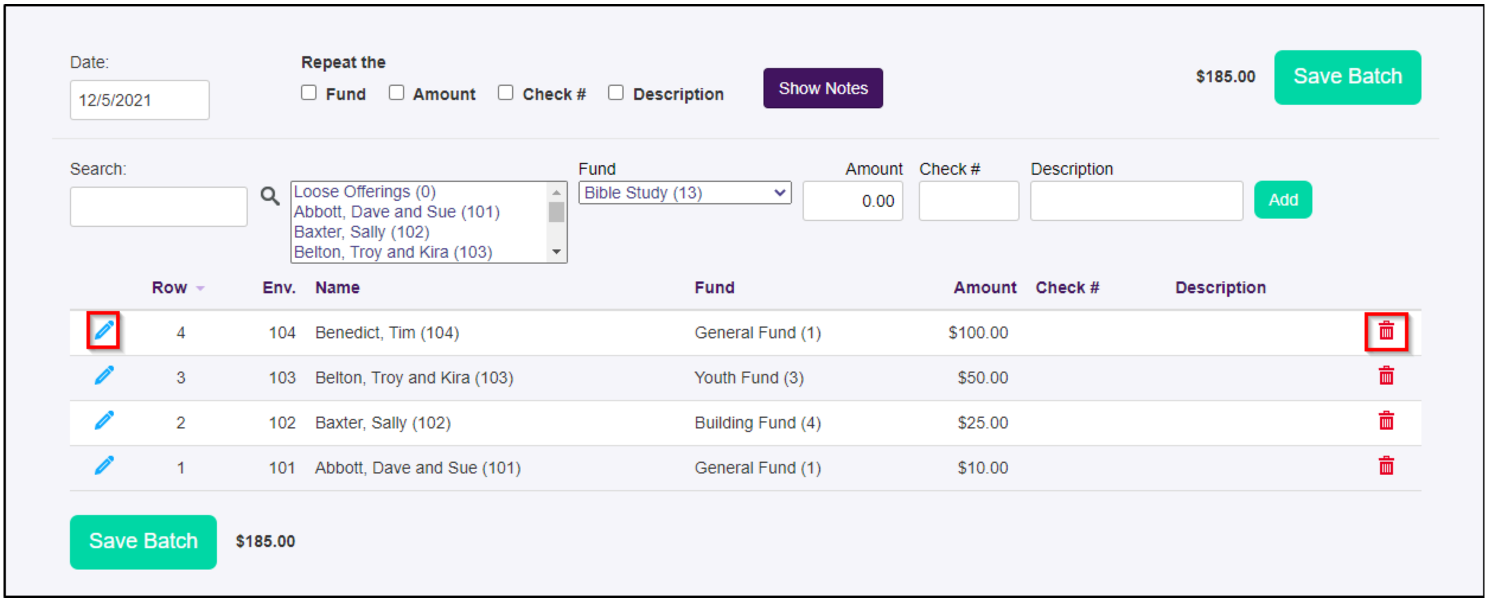
Editing a batch can be done at any time in WebTools as long as the batch has not been imported into Shepherd's Staff. Once it is imported in Shepherd's Staff it will have to be edited in Shepherd's Staff. Not only can the date of the batch be changed, but you can also delete and edit each row in the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

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

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

To edit a batch:

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

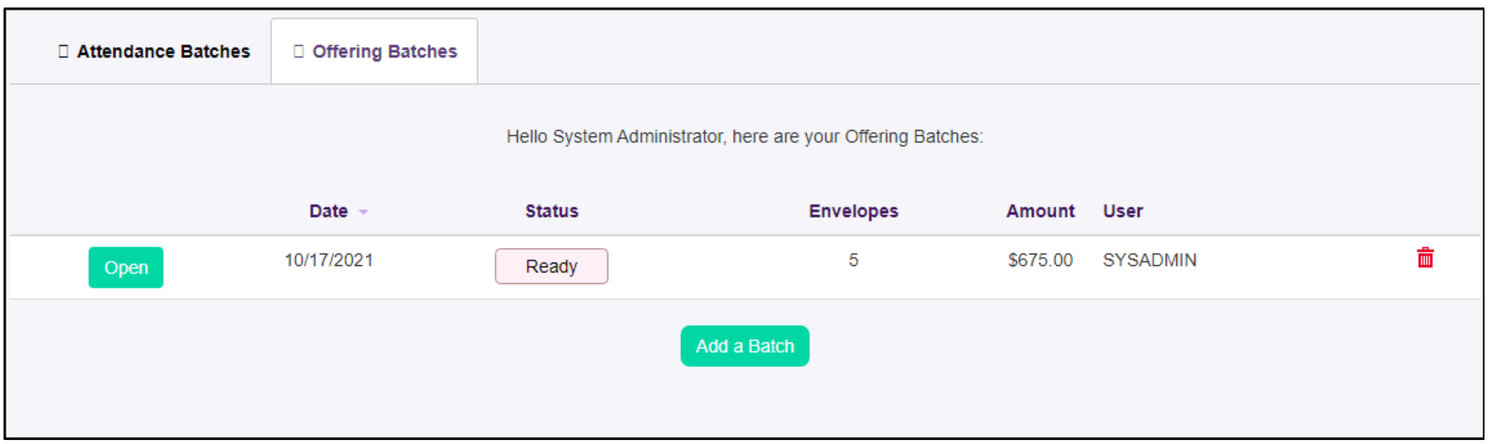

Date:
12/5/2021
Repeat the
Fund
Amount
Check #
Description
Show Notes
$185.00
Save Batch
Search:
Loose Offerings (0)
Abbott, Dave and Sue (101)
Baxter, Sally (102)
Belton, Troy and Kira (103)
Fund
Bible Study (13)
Amount
0.00
Check #
Description
Add
Row
Env.
Name
Fund
Amount
Check #
Description
4
104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

Import from Web Tools

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

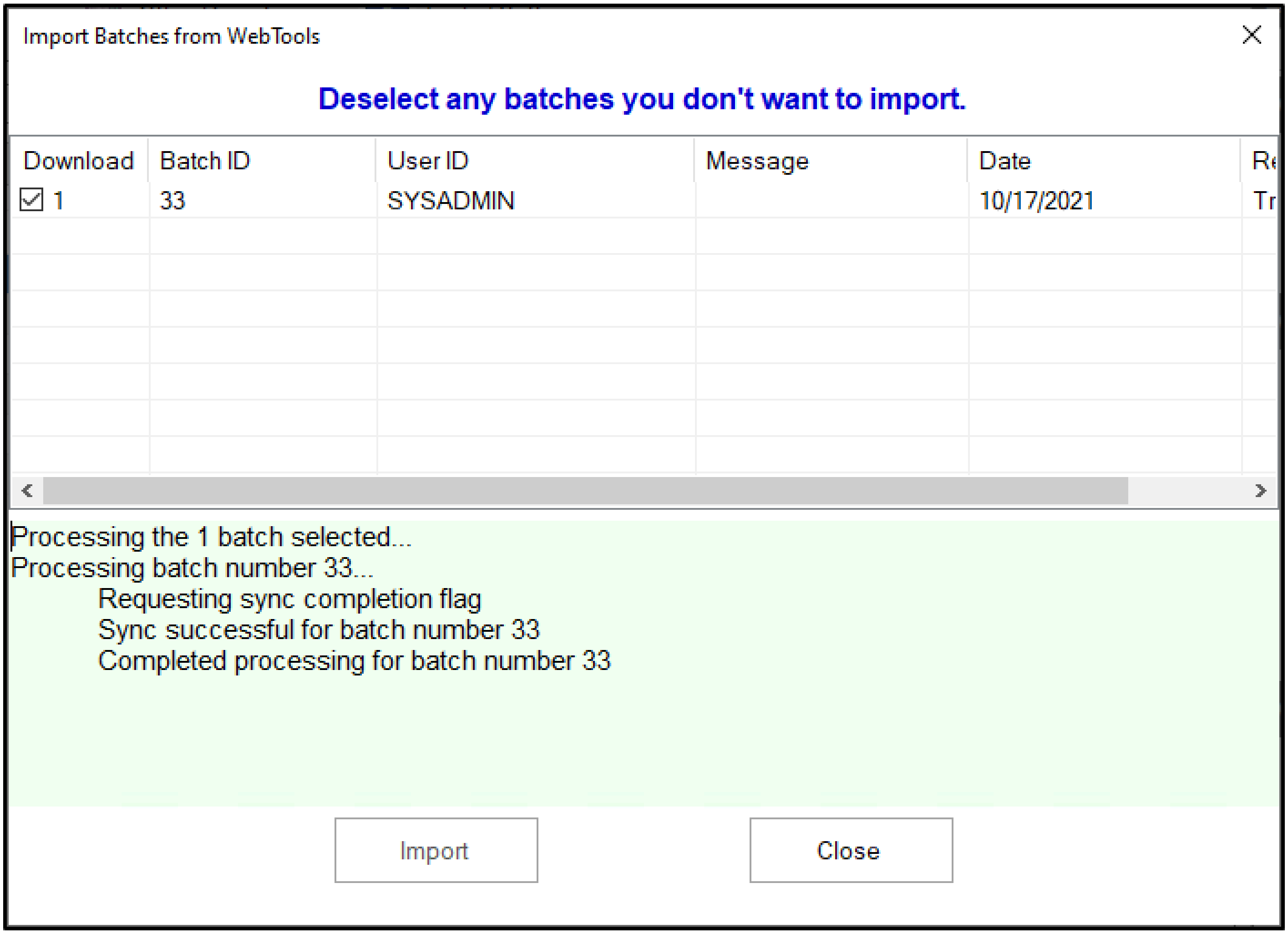
Note: In order to be able to import from WebTools, you must have an Active Shepherd's Staff Support contract.

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



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

1. In Giving>Batches, click the Web Tools button at the bottom of the batches grid.
2. A window will appear, showing all batches that are ready to import. Make sure the box is checked next to each batch you want to import, and unchecked next to any batches you don't want to import.
3. Click the Import button at the bottom of the grid
4. Once you have received the message that each of your offering batches has completed processing, click the "Close" button
5. The offering batch(es) you imported will now appear in your unposted batches. You can then edit or post those offering batches as you could with any contribution batch in Shepherd's Staff.


Import Batches from WebTools
Deselect any batches you don't want to import.
Download
Batch ID
User ID
Message
Date
1
33
SYSADMIN
10/17/2021
Processing the 1 batch selected...
Processing batch number 33...
Requesting sync completion flag
Sync successful for batch number 33
Completed processing for batch number 33
Import
Close