# 2016 FEATURES & FIXES

## Shepherd's Staff 2016

This document lists improvements to Shepherd's Staff found only in the 2016 version release (such as our new Accounts Receivable feature), as well as those that were made available early to customers in the Shepherd's Staff 2015 Feature Pack. Improvements found in the 2015 Feature Pack are indicated by an asterisk (*).

## New Features

### General

- The redesigned calendar of events in Membership, Attendance, and Contributions now includes the following features:
    - The event name, the begin- and end-times, and the room name for each event now appear directly on the calendar itself (instead of just the number of events).
    - Additional holidays, including Christmas Eve, Passover Sunday, Ascension Day, Maundy Thursday, and Reformation Day have been added. Please note: Reformation Day only appears in the Lutheran and Presbyterian editions at this time.
- Brighten up your day by selecting from a palette of background colors for each module's workspace. This setting saves by user, by module, so that everyone can customize their workspace.

- New internal User Activity log tracks who is in which module at any given time. The log is updated every 10 minutes. This log can eventually assist with inter-PC communication between active Shepherd's Staff users or allow the CTS support team to see specifically who is still in the program when trying to perform a database update, run the database optimization, or restore a backup.
- The Fast Facts window now includes the person's preferred method of contact.
- When entering dates, you can now enter just the month and day, then press TAB and the current year will automatically fill in. Please note: This does not apply to birth date, since the year can be left blank.

## Main Menu

- The Import Membership Data utility now lets you import the following additional information:
    - For households: Newsletter; Newsletter Method.
    - For people: Membership Code; Cell Phone Carrier; Preferred Contact Method.
- A new short-cut under Utilities will help CTS support technicians remote into a customer's PC faster during a support call.

## Membership Module

- The Sunday School/Church Class Roster report has the following improvements:
    - Additional checkboxes allow you to record attendance for 17 weeks (a trimester) instead of 13 weeks (quarterly), meaning fewer attendance sheets need to be printed.
    - Twice as many blank lines are now available for writing in visitor names.
    - New checkboxes next to each visitor line allow you to record visitor attendance.

    - The “blank form” report now prints an entire page (24 blank lines), along with checkboxes to mark attendance.
    - You can now print a person’s email address below their name.
- You can now include “historical attendance” on the Sunday School/Church Class Roster report (meaning if you print a report that includes dates in the past, it will fill in a an “X” for the times each person attended).
- You can now print the Activity/Skill/Training report for a combination of Activities, a combination of Skills/Spiritual Gifts, or a combination of Training Classes (instead of for just all or one).
- “Newsletter Method” added to the Households grid; quickly change the type of newsletter a household receives by just unlocking the grid.
- The Church Directory can use the head of household or spouse cell phone as the primary phone number for a household that does not have a landline.
- The Visitation Schedule report has been renamed to “Visitation Schedule and Planning” and has a new option titled “Plan new visits” for households or people who have never been visited, have not been visited since a given date, or who have not attended since a given date.
- New expanded information section on the Households Tree shows the same type of overview information as on the Fast Facts window.*
    - If viewing household data, you can use the edit button to launch the Household Record and the print button to launch the Household Record report window defaulted to the selected household.
    - If viewing person data, the edit button launches the Person Record and the print button launches the Person Record report window defaulted to the selected person.
    - The person information includes activity/skill/training, and vis-

it and death, information at the bottom in a scrolling grid (and from where you can also add to and edit this data). Please note: The Visit information is only accessible if the user has rights to Visits under user security.

  - The way the tree displays the Household and Person Record windows operates with these rules:
    - If the tree window is NOT expanded: (1) selecting a person displays the Person Record window; (2) selecting a household does NOT show the Household Record—you must click the Show Household button.
    - If the tree window IS expanded: (1) a Person Record window is NOT automatically opened, but if one is already displayed it is refreshed to the selected person; (2) a Household Record is not opened, but if one is already displayed it is refreshed to the selected household as you switch households or people.
    - If you edit a household or person record, and the tree is expanded and it is showing the same household or person you are currently editing, then the data in the tree is automatically updated. Please note: If you change a person or household name, that name is not reflected in the tree until if refreshes, but it is reflected at the top of the expanded data.
  - The address portion of the details window also has a map button (which works as it does elsewhere, taking you to either Google Maps or MapQuest) and a clipboard button (which copies the address only so that it can be pasted into a letter or other document).
- The personal information also includes whether or not the individual gave to the church within the past 12 months.
- Mailing Labels can now include the carrier route, and can now be sorted by “Zip + Carrier Route + 4” or “Carrier Route + Zip.” We’ve also added new versions of the label count report for “Car-

rier Route Count” and “Carrier Route Count by 5-digit Zip.”

- The “Find” button on the Household and Person record has been made simpler to use, including the ability to search on any part of a household or person name.
- Back by popular demand, the global search has been updated to include the original “Find Household” and “Find Person” search features that used to reside in the toolbar.
- Mail Merge has been designed to use the Report Library feature, instead of having its own Save/Load buttons.
- New field “Show in Church360° Unite” has been added to the Mass Update utility.
- Faster switching between Household and Person records when just viewing data (i.e. we eliminated the “you are already viewing a record” messages). Please note: Adding a new person or household still requires the prior Person or Household record window to be closed.
- Improvements have been made to the Global Search feature to make it easier/faster to use.
- For LCMS churches, the LCMS Congregation Annual Report now has diagnostic and help tools to assist with locating mis-entered information.*
- The Person Record report has a new option to print just records for current members (i.e., non-removed members).
- The Person Record report now includes the last date the person and/or person’s household was visited, along with the type of visit and the name of the person making the visit. (The line is suppressed if the person printing the report does not have rights to access visit information.)*
- The Person Record report now includes the last time the person attended each type of event at which attendance is taken (i.e., Worship, Communion, Sunday School, etc.).*
- The Person Record report now includes the Medical/Allergy field.*

- The United Methodist annual reports has been updated to the latest version (includes Tables I, II, and III; Table III is the "Church Income Report").*

## Attendance Module

- On the "Person by Occurrence" and "Person by Week" analysis tabs of the Events grid, you can now choose to filter the data by a Subgroup, giving you the flexibility to analyze the attendance for any subgroup of people such as teens, college age, senior adults, married persons, single persons, men only, women only, confirmed members, etc.—the options are as limitless as the variety of subgroups you create.
- To help prevent entering an attendance batch for the wrong date, the full date is now spelled out in words on the batch entry window (e.g., "Sunday, December 6, 2016").
- To correct mistakes, you can now switch an unposted batch to any other attendance event, even if the attendance types do not match.
- When entering batches, removed people are now excluded by default from the Possible Attendees list. (Removed people can still be displayed by checking the new "Include Removed People" checkbox.)
- When entering batches, you can now add visitors to the database without having to switch to the Membership module by using the new "Add a Visitor" button.*

## Contributions Module

- When printing previewed contribution statements for a quarter (or other date range), the statement now includes the given-to-date amount for the entire year.
- When adding pledges, inactive contribution funds are now excluded from the list of available funds to reduce visual clutter.
- You can now add a custom message to envelope mailing labels,

such as “Please do not use before January 1.”*

- Batch posting no longer requires all other windows to be closed before continuing; it will automatically close any windows that might interfere with the posting process.
- You now have the options to flag a contributor to *not* receive a statement when you print contributions statements, which helps account for special cases/requests.

## Finance Module

- With the new Accounts Receivable feature, you can keep track of all the moving parts in Finances. Use it to generate invoices, track payments by multiple payees and scholarships, manage sets of line items, and customize discounts and payment structures.
- Now, you can quickly print a single Journal Register entry from the Journal Register grid.
- On the General Ledger report you can quickly print a financial quarter without manually picking the date range.
- On the General Ledger report you easily print for one or more accounts without specifying each section of the account number. You selection of accounts can be save in the Report Library for easy retrieval.
- When entering Journal Entries you can now click “Add Again” to enter another journal, without having to first exit back to the Journal Entry Register grid.
- The Journal Entries grid now works like the Checks grid in that it initially displays just the last 12 months of activity, reducing visual clutter, and improving speed.
- The Deposits grid now works like the Checks grid in that it initially displays just the last 12 months of activity, reducing visual clutter and improving speed.
- On the Accounts Tree, pressing F5 now launches the account search window for those who prefer keyboard usage.

- The check printing process has been streamlined with the removal of two unnecessary pop-up messages.
- The new Chart of Accounts prints in a hierarchal format (similar to the Accounts tree, but without the connecting lines).
- The "preferred accounts" feature for vendors has been incorporated into Journal Entries, for when you've assigned a vendor to an EFT journal. Please note: The system automatically adds accounts to the vendor; you do not have to manually add them through the vendor record, though that can still be done if you prefer.*

## Report Writer

- The new field "Person Record Added" shows the date a person's information was first entered into the Membership module.
- The new field "Person Record Last Updated" shows the last time a person's information was changed in the Membership module.
- The new field "Household Record Added" shows the date a household was first entered into the Membership module.
- Under specialized layouts, you'll find a new generic "checklist" report that lets you specify a starting date, an interval (weekly, monthly, daily) and then print 17 checkboxes/columns, incrementing the starting date by the interval.*
- Under specialized layouts, you'll find two new label reports—one for 3 x 10 label sheets and one for 2 x 10 label sheets. Please note: These are not intended for use as mailing labels, since they do not offer USPS features such as barcoding, all caps, etc.
- Under specialized layouts, you'll find a new generic "sign-in sheet" report.*
- Under "Formatting," a new checkbox titled "Hide the group count" allows you print a report grouped on the first file report while suppressing the sub-count that normally appears under each group. This reduces visual clutter when a sub-count is not needed and uses less paper.

## Subgroups

- Dynamic subgroups now include the new field “Show in Church360° Unite.”
- When using the People table to view the names of people in a given subgroup, Fast Facts information now shows directly to the right of the person’s name (with the ability to send an email), without having to open the Fast Facts window itself.*