



Introduction to Membership *Training Manual*

Introduction to Membership Module

This section provides a general introduction to the Membership module of Shepherd's Staff. You'll learn about the general layout of the module, how to customize it to meet your needs, and some best practices for data entry.

Introduction to Membership Module

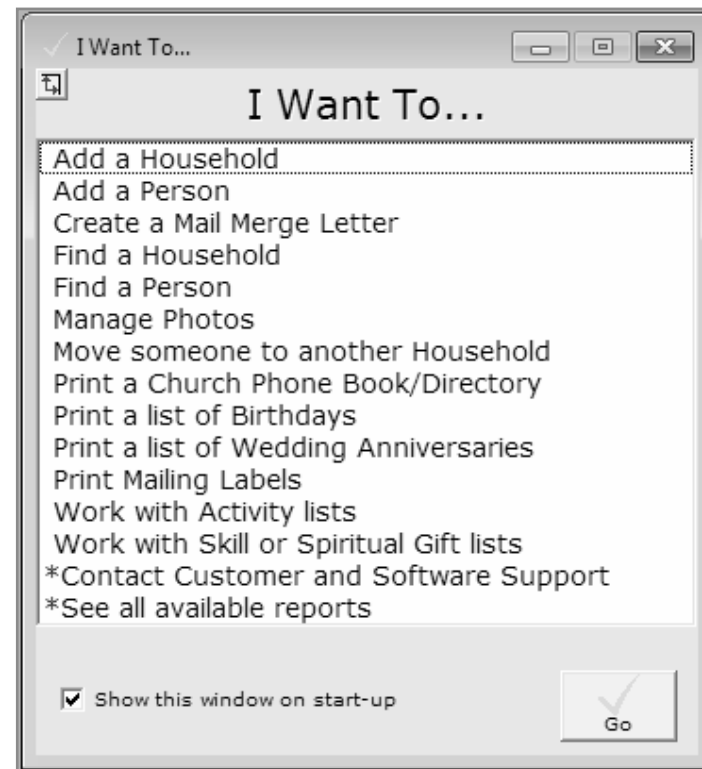
The Membership module allows you to store a variety of information about the members of your church. Common tasks include adding households and members, editing contact and demographic information, printing mailing labels, and creating church directories.

- 1 Household Records
- 2 Add a Household
- 3 Search for Households or People
- 4 Person Records
- 5 Add a Person
- 6 Activities / Skills / Training
- 7 Visits
- 8 Church Register
- 9 Subgroups
- 10 Reports
- 11 Mailing Labels
- 12 Send Email
- 13 To Do...
- 14 Scheduler—Calendar of Events
- 15 Household Tree
- 16 Church Dashboard
- 17 I Want To . . .



“I Want To . . .” Screen

This window is designed to be a quick shortcut to some of the more popular tasks within the module you are currently in. If you would like to turn off the “I Want To . . .” Screen, you can do so by clicking Desktop on the file menu and making sure “Show the ‘I Want To’ helper on start up” box is unchecked.



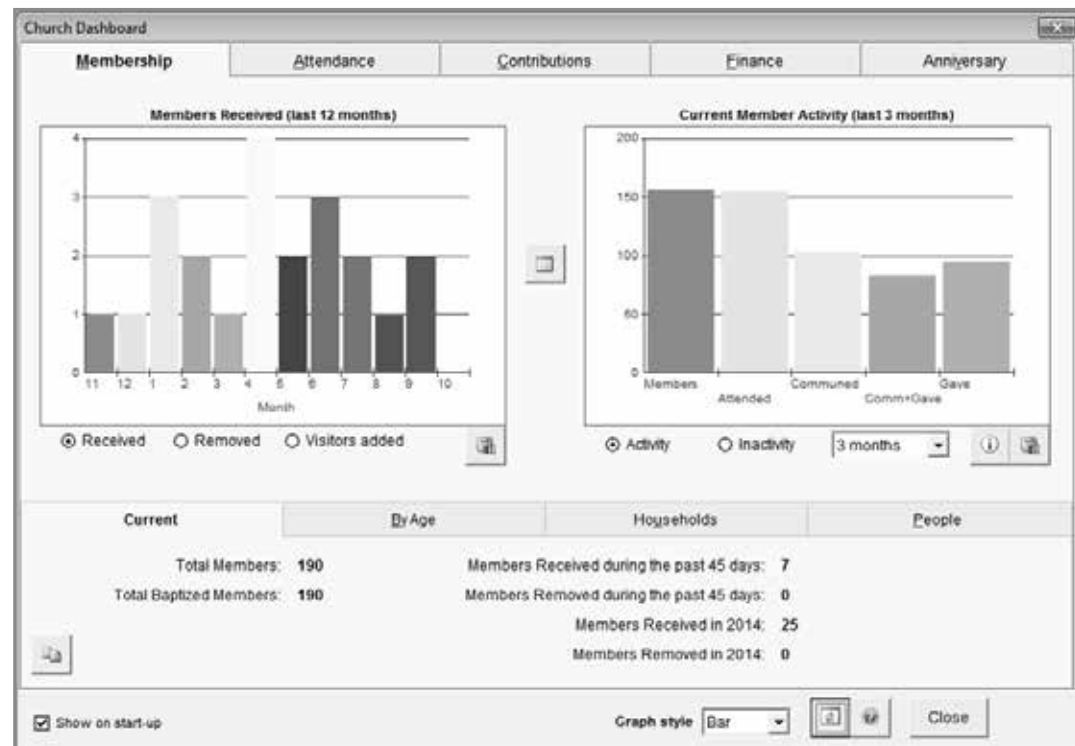
Church Dashboard

The Membership tab on the Church Dashboard contains a quick snapshot of your membership data. This includes information such as how many members have been received this year and how many total members you have.

There are two graphs on this page, one that shows members received/removed or visitors added, and one that shows your member activity for the past three months.

If you look at the bottom of the dashboard, you will find some statistical information for your database. This includes a current count of members and an age breakdown of your congregation, as well as some helpful insights into your Household and People records.

1. To view the dashboard, go to Reports and click Dashboard.
2. You can copy these graphs to another program by clicking the Copy to Clipboard button.
3. On the Members Received graph you can view the total Received, Removed, or Visitors Added to your congregations roles over the last 12 Months.
4. On the Current Members Activity graph you can view activity or inactivity over different time frames like one month, six months, ect.
5. The info and question mark buttons will give you the current criteria of the displayed statistics.
6. To update the statistics on the dashboard to reflect a change made in the database you can close and reopen the dashboard or you can click the Refresh button at the bottom of the window.



Tree by Household

Similar to the way the dashboard can be used to show your membership activity at a glance, the tree is also available to show your member information at a glance.

There are 6 trees available from the “By Household” view.

- » **Member Households**—Displays just the households that have at least one non-removed member.
- » **Non-Member Households**—Displays just the households that have at least one non-member.
- » **All Households**—This is the original tree with no member/non-member filtering applied.
- » **Only Members**—Displays only non-removed members within each household.
- » **Only Non-Members**—Displays only non-members within each household.
- » **Business, Church, Organization, School**—It shows all Household records with one of those four household types assigned to it.

1. You can access this tree by clicking Tree in the file menu and then selecting “By Household.”
2. To change the tree filters, click the dropdown box and select the desired view.
3. When a Node is displayed with a + sign, it can be opened by clicking on it to display the Branch. Branches can be clicked on to access that individual’s record.
4. In order to access the Household record, you can select it in the tree and then click the Show Household button.
5. The Refresh button is used to update any changes you have made to membership since entering the module.



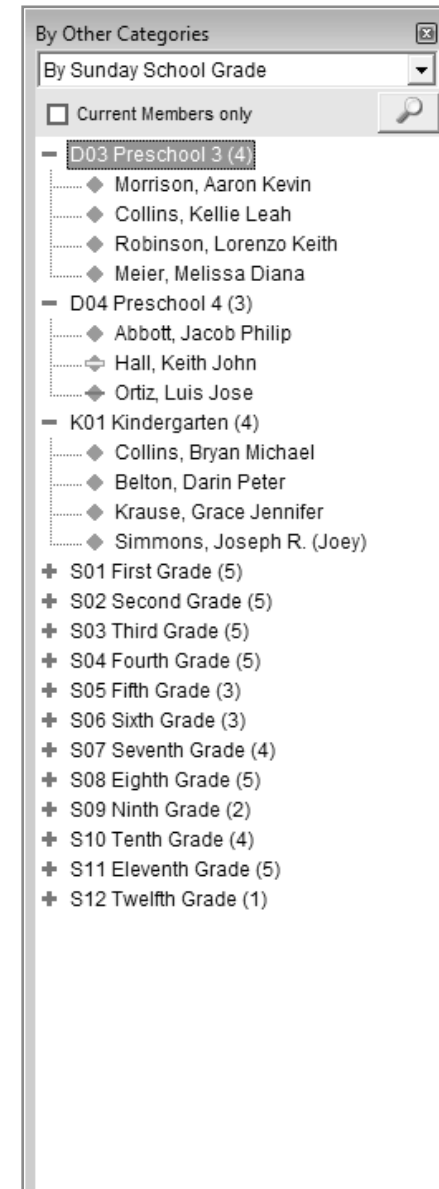
Tree by Other Category

The Trees by Other Category view allows you to quickly group your membership into some of the standard categories.

Ten trees are available from this view:

- » **Membership Code**—Groups your people by their membership codes.
- » **Participation**—Groups by the Participation field on their Person records.
- » **Sunday School Grade**—Groups the people by their Sunday School grade.
- » **Age Group**—Uses the same age groupings that are seen on the Statistics window.
- » **Age**—Shows the people at each individual age.
- » **Ministry Group**—Shows which people belong to each Ministry Group.
- » **Person Assigned**—Groups the people by the Person Assigned field.
- » **Present Activity**—Shows the people presently involved in each activity.
- » **Skill/Spiritual Gift**—Shows people grouped by their skills/spiritual gifts.
- » **Training Class**—Displays the training lists and the people within each list.

1. You can access this tree by clicking Tree in the file menu and then selecting “By Other Category.”
2. To change the tree filters, click the dropdown box and select the desired view.
3. When a Node is displayed with a + sign, it can be opened (by clicking on it) to display the Branch. Branches can be clicked on to access an individual’s record.
4. Checking the “Current Members only” filter will take the removed people on the lists. People who are removed by “Death” do not show regardless of this filter.



Customizing the Desktop

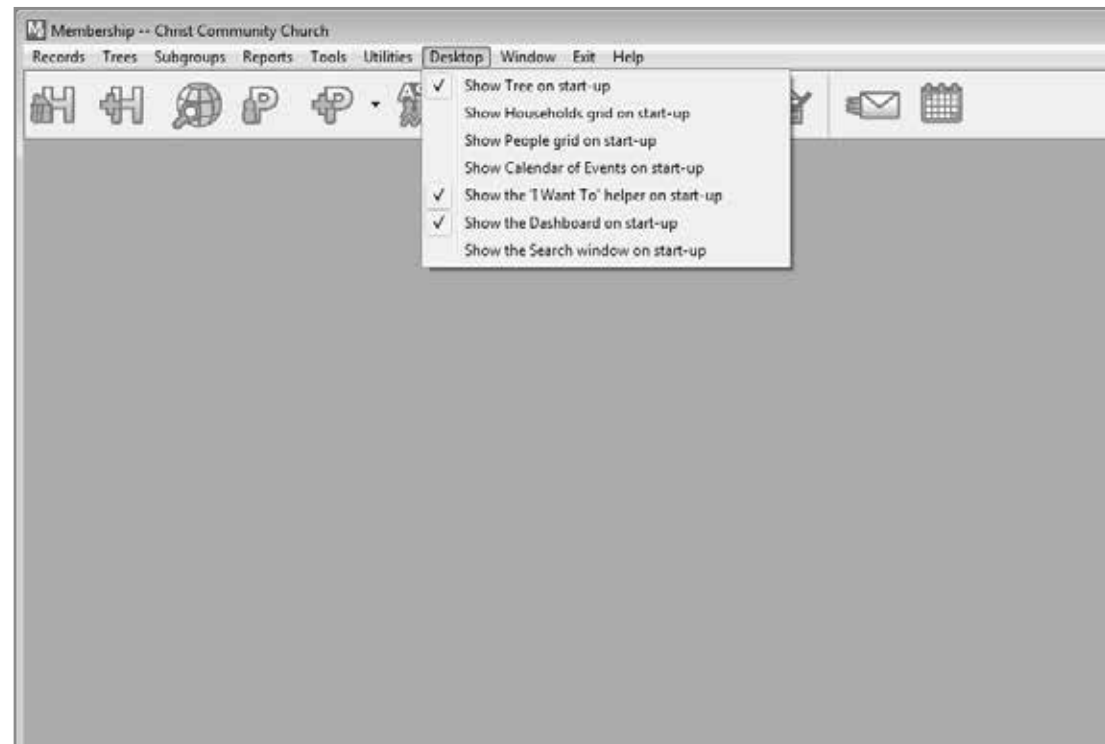
You can customize each of the modules by using the Desktop feature. Each user can customize his or her own desktop.

For example, if the first window you always open in Membership is the Households Grid, you can have the Membership module remember this and open the Households Grid automatically.

To do this, check “Show Households Grid on start-up.”

Note: Multiple options may be selected. You can select all six options or any variation of the six options.

1. This feature can be accessed by clicking on Desktop from the toolbar.
2. From here, you can choose which windows you'd like to have open automatically when that module opens, saving you time.



Ministry Task Manager

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

There are three major tabs inside the Task Manager:

- » **Task Templates**—This tab shows your existing task templates and lets you add, edit, and delete templates.
- » **Tasks To Do**—This tab lists all open/uncompleted, template-based tasks from everyone's to-do list. In addition to viewing existing tasks, you can generate more tasks, filter by responsibility, and export the list to Excel. Use the “Refresh To-do List” Button to erase and regenerate all uncompleted, non-action, template-based tasks.
- » **Completed Task**—This tab lists all completed template-based tasks from everyone's to-do list. In addition to exporting the list to Excel, you can also filter by responsibility and “completed by.”

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

The screenshot displays the Ministry Task Manager interface. It features three main tabs: 'Task Templates', 'Tasks To Do', and 'Completed Tasks'. The 'Task Templates' tab is active, showing a list of tasks with columns for 'Task' and 'Category'. The 'Tasks To Do' tab is also visible, showing a task 'Create and Print Weekly Bulletin' with a 'Save' button and a 'Category' dropdown. The 'Completed Tasks' tab is empty. The 'Task Templates' list includes: 'Create and Print Weekly Bulletin', 'Input Bills Into General Ledger', 'Send Scripture Lessons to Readers', 'Refill Candle Oil' (Maintenance), 'Create and Print Monthly Newsletter' (Office), and 'Upload Sermon Recording To Website' (Office). The 'Tasks To Do' task details show: 'Task: Create and Print Weekly Bulletin', 'Task start date: 10/20/2014', 'Days allowed to complete it: 4 days', 'Monday, October 20, 2014', 'Responsibility / ownership: 1 (nobody), 2 (nobody), 3 (nobody)', 'Repeat this task: On Monday every week (selected), Stop repeating on: 10/1/2114', and 'Make inactive until after'.

Repeating Task

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

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

- » **Task**—The Task sub-tab holds all of the settings needed to create your repeating task template.
- » **Steps to Complete**— Use this area to give your church workers or volunteers the instructions needed to complete a task. You may enter up to 50 steps.
- » **Documents / References**—There are times you will want to provide additional reference material to clarify the task at hand. Use this sub-tab to attach supplementary information to the task template.

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

1. You can access the Task Manager from every module inside Shepherd's Staff by clicking Tools and selecting Task Manager. You can also open the Task Manager from the To Do... list by clicking the Task Manager Icon located at the bottom.
2. Click New Task to start the creating a new Task Template.
3. Enter the Task name (required), Category, and Description / overview.
4. Under the "Repeat this task" section, select the appropriate schedule.
5. Assign responsibility or ownership to these tasks to ensure the tasks are completed in a timely manner. You can assign up to three people to a single task.
6. You may also need to set a "Task start date," set the "Days allowed to complete it," and enter a "Stop repeating on" date.
7. Make sure to click Save.

Note: If this task has a future start date, check the "Make inactive until after" checkbox and fill in the appropriate date.

The screenshot shows the 'Task' sub-tab in the Task Manager interface. At the top, there are fields for 'Task' (containing '(new task)') and 'Category'. Below this are three tabs: 'Task', 'Steps to Complete', and 'Documents / References'. The 'Task' tab is active and contains several sections: 'Description / overview' (a large text area), 'Task start date' (10/15/2014), 'Days allowed to complete it' (same day), 'Responsibility / ownership' (three dropdown menus, each set to 'nobody'), and 'Repeat this task' (radio buttons for various schedules, with 'On Wednesday every week' selected). There is also a 'Stop repeating on' date field (10/15/2114) and a 'Make inactive until after' checkbox at the bottom.

Action-Based Task

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

Some examples of these actions are adding a visitor, marking someone as baptized, and changing an individual's marital status.

1. Click New Task to start the creating a new Task Template.
2. Enter the Task name (required), Category, and Description / overview.
3. Under the "Repeat this task" section, select "When someone" and select the appropriate action.
4. Assign responsibility or ownership to the task to ensure the task is completed in a timely manner. You can assign up to three people to a single task.
5. You may also need to set a "Task start date," set the "Days allowed to complete it," and enter a "Stop repeating on" date.
6. Make sure to click Save.

Note: If this task has a future start date, check the "Make inactive until after" checkbox and fill in the appropriate date.

The screenshot shows a web-based form for creating a new task. At the top, there is a 'Save' button, a 'Task' input field containing '(new task)', and a 'Category' dropdown menu. Below this is a table with three columns: 'Task', 'Steps to Complete', and 'Documents / References'. The 'Task' column contains a 'Description / overview' text area. The 'Steps to Complete' column contains 'Task start date (date of change)' and 'Days allowed to complete it (same day)'. The 'Documents / References' column contains 'Responsibility / ownership' with three dropdown menus, each currently set to '(nobody)'. Below the table is a 'Repeat this task' section with several radio button options: 'Never (only occurs on 10/15/2014, or is only for reference)', 'On Wednesday every week', 'On the 15th every month', 'On October 15th every year', 'On the first Wednesday each month', and 'When someone is added as a Visitor' (which is selected). To the right of these options is a 'Stop repeating on' date field set to '10/15/2114'. At the bottom, there is a checkbox labeled 'Make inactive until after' followed by a date field.

To-Do List

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

The To-Do List opens when you open any module and is docked to the right side of the screen.

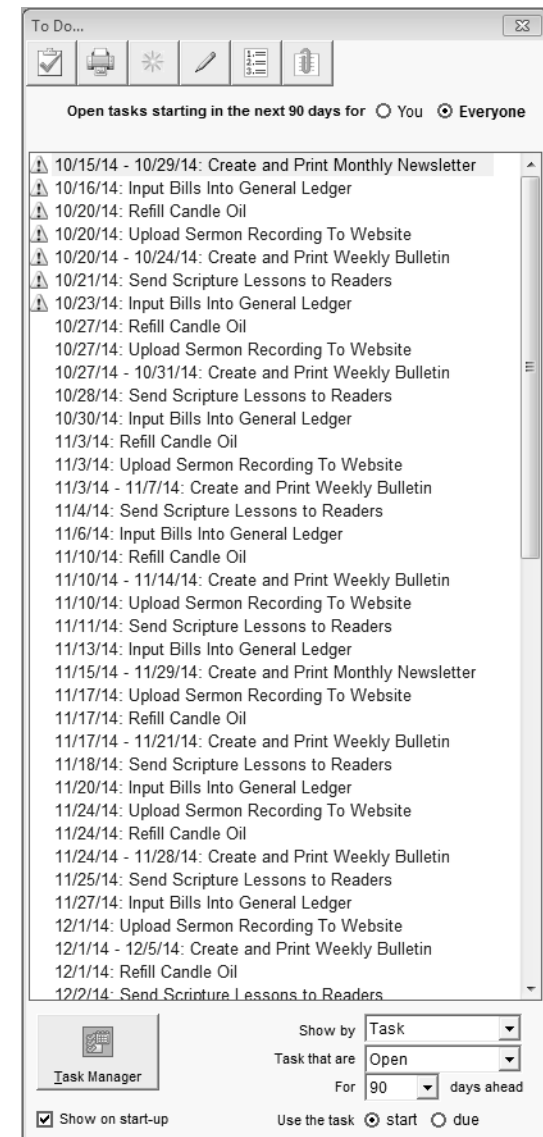
1. Click "Mark this Task Completed" to launch the "Complete this task" window. When completing a task, you will need to select a Date Completed and the person who completed the task.
2. The "Print a To-Do List" button lets you print a To-Do List report. Filter your task report by the task status or task name. You may select your desired time frame and several different options.
3. Using the "Add a one-time task" button allows you to create a one-time task, set a due date, and assign a category and a responsibility.
4. Click the "View or change the selected task" button to update or correct a task. Changes to a task go into effect immediately when the OK button is clicked.
5. Use the "Delete this task" button to permanently delete a task.

6. Click the "Task Manager" button to open the Task Manager utility used for creating and managing task templates.

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

- » **Open tasks starting in the next 90 days**—Shows the next 90 days worth of open tasks for you or everyone.
- » **Show by**—Groups tasks by one of several options. A few examples of grouping options are Tasks, Date / Task and Person / Task.
- » **Task that are**—Allows you to display open tasks (including past due tasks), only past due tasks, or completed tasks.
- » **For [n] days ahead/past**—Filters by number of days when displaying open or completed tasks. You can specify how far ahead or in the past to display tasks. (This option does not apply when displaying past due tasks and is hidden.)
- » **Use the task**—Allows you to show start date or due date. This option only appears when displaying open tasks.

Note: If you would prefer not to show the To-Do List upon launch, uncheck the box by "Show on start-up."



Database Conventions

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

» **Text Fields**—These fields contain only the data that you type into them. Some examples of these fields would be Spouse's Name, Address Line 1 and 2, and Email.

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

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

1. To add an item to an option field: Type in the item and hit TAB.
2. To delete an item: Hit drop arrow with mouse, scroll with arrow buttons on keyboard to desired item, and hit DELETE on keyboard.
3. To remove item from record but not delete from list: hit BACKSPACE instead of DELETE.

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

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

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

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

1. Use the ALT button plus (+) the letter underlined, for example ALT+R, to access Records.
2. To navigate within Shepherd's Staff after using an ALT command, use TAB to go forward, SHIFT (+) TAB to go back. The directional buttons (left, right, up, down) can be used to navigate as well. ENTER is used for OK.
3. The Escape button (ESC) will always close an open window.

The screenshot shows a form titled "Marriage" with three input fields. The first field, "Marital Status", is an option field with a dropdown arrow and the word "Married" selected. The second field, "Spouse's Name", is a text field containing "Jessica". The third field, "Wedding Date", is a date field containing "5/17/2008" and a calendar icon. The labels "Marital Status" and "Wedding Date" are underlined, indicating they are required fields.

Grid Conventions

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

The features described on this page can be used in every grid and in every module.

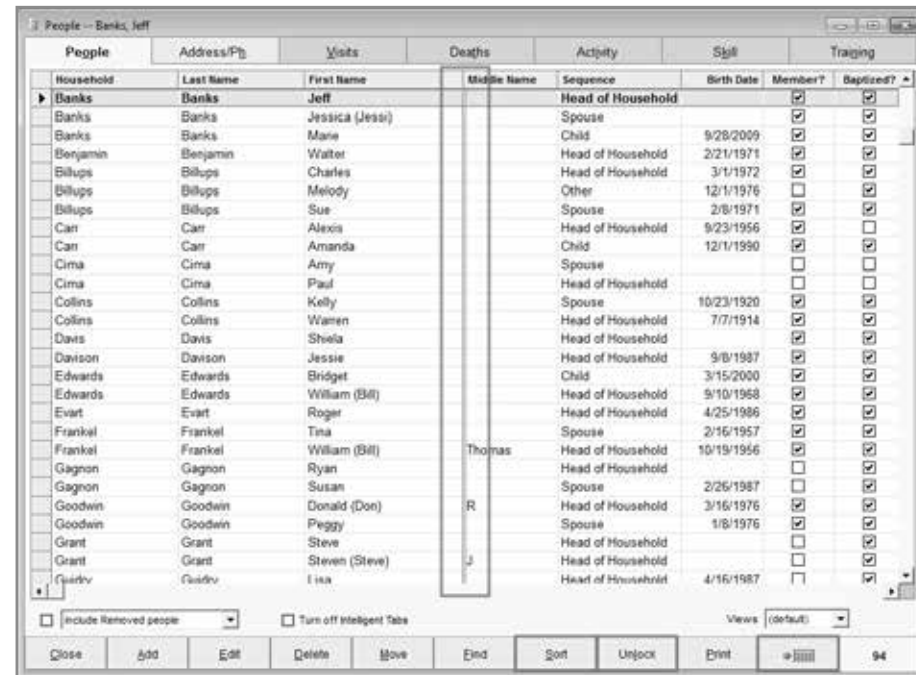
» **Sorting Columns**—Almost any column in a grid can be sorted by clicking on the column header, then the Sort button below. Also, a grid can be sorted by more than one column by clicking the columns in the order of sorting. For example, if you want all Members sorted together alphabetically, click on the Member column first, then the Last Name column, then Sort. In the example below, we are sorting the grid by First Name.

» **Moving Columns**—Columns can be moved to the left or right to customize the grid. Click and drag the column header to move it, then let go to put it in place. In the example below, we could move the First Name column of the People Grid from the third position to the first.

- » **Freezing Columns**—Columns can be frozen on the grid by dragging the “freeze bar” across them. On the left side of the left hand column (Household), there is a bar about a millimeter in width. Click and drag (by holding down the left mouse button) the bar to the right, passing over two or three columns, then drop it (by letting go of the left mouse button). Now, the columns to the left of the freeze bar are frozen when you scroll to the right.
- » **Unlocking**—Unlocking a grid allows data to be edited directly on a grid without opening the record, which saves time. To unlock a grid, click

on the Unlock button in the lower right hand corner. The grid will immediately turn white and gray-colored. The gray-colored columns cannot be edited because they represent fields that are managed through other areas of the program.
Note: Not all grids in Shepherd's Staff can be unlocked.

- » **Export to Excel**—Most grids in Shepherd's Staff can be exported directly to Microsoft Excel® by clicking the Export to Spreadsheet button located at the lower right of the grid.



Help System

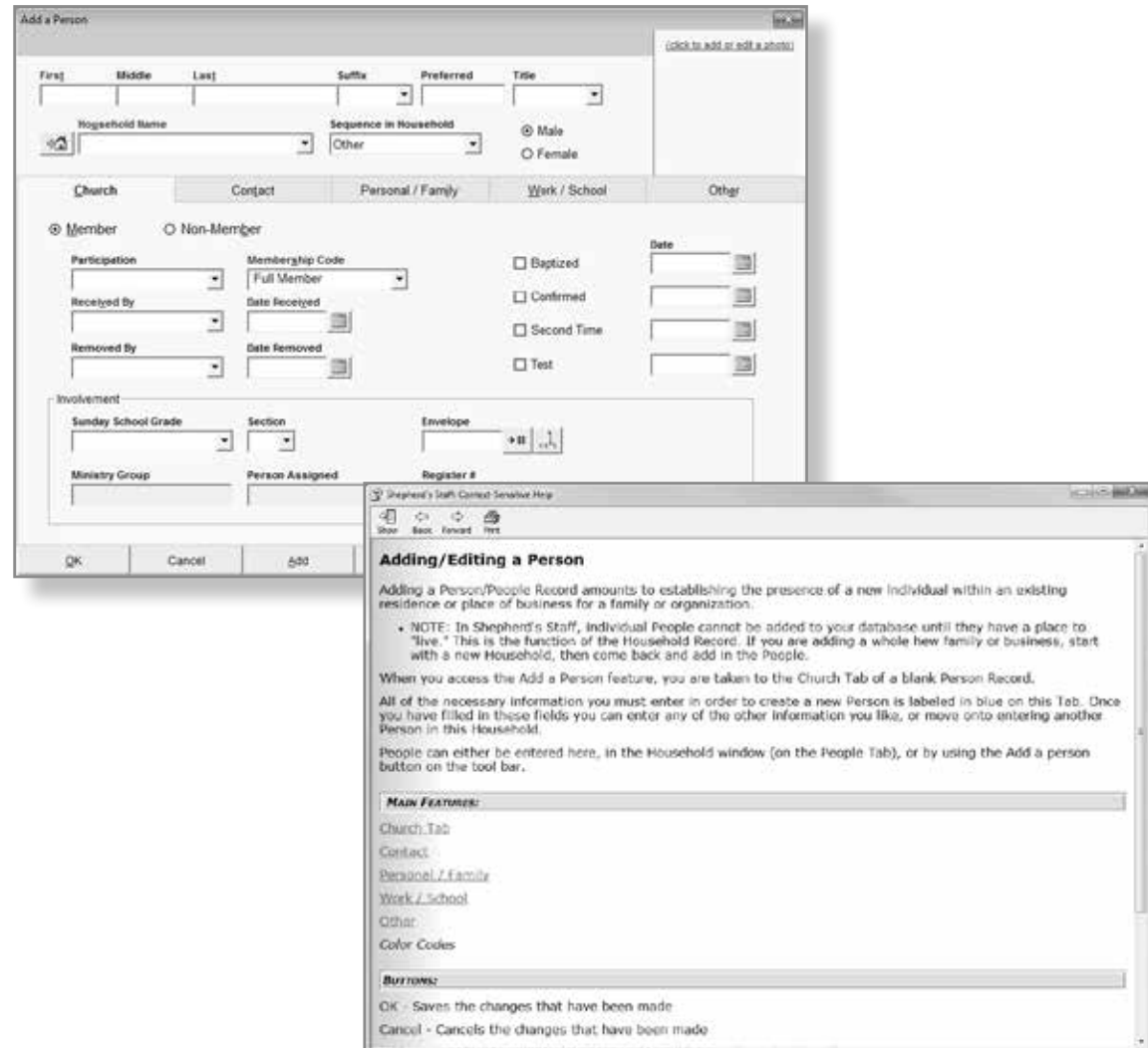
Shepherd's Staff has an internal help system included with the software.

This help system is context sensitive, so if at any time you need more information on a specific window, click F1 to enter the Help system for that specific window. The page that comes up will tell you the purpose of the window you are on as well as what the options and buttons do.

For example, say you need more information on the Person record window. In this case you could open a current Person or you could simply click the Add Person button; when the window comes up, click F1.

You can also access the help system by clicking Help on the file menu and choosing either User's Guide, Common Questions, or Common Tasks.

In this manual we will talk about several tasks and windows within Shepherd's Staff. However, not every button and option will be covered here, and that is where the help system becomes invaluable.



Consistent Data Entry

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

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

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

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

Tip: Making a list of these data conventions! Write them below, or keep a list by your computer.

Location	Field	Always Use

Backing Up Your Data

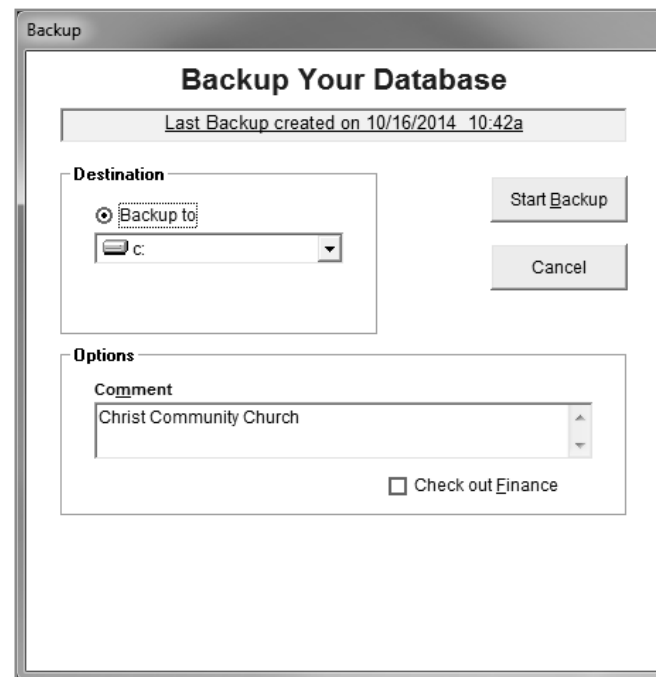
The Back Up Your Database utility is one of the most important utilities in Shepherd's Staff. When you make a backup, you are in essence making a copy of your database at that moment in time. The backup takes the Microsoft Access® database, compresses it into a file called CPHBKP32.001, and then saves it to the root of any disk drive the computer has permission to access.

It is highly recommended that you make multiple backups and do so on a routine basis. It is also suggested that you keep one of these backups on a removable drive (USB/Flash, CD, Cloud, etc.) that you can take off-site. In the case of a disaster or computer failure, a copy of your data would be safe with you.

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

If a backup file already exists, you will receive the message shown below. Clicking YES will create a new backup file called CPHBKP32.001 and will rename the existing file in the following format: CPHBKP32-YYYYMMDD-HHMM.001 (Y= Year, M=Month, D=Day, H=Hour, M=Minute). Clicking NO will overwrite the existing CPHBKP32.001 file.

1. You can access the Backup utility from the Main Menu by clicking Utilities and choosing "Backup."
2. Next you will choose the destination for your backup. If you don't see the drive, you need to try closing the Backup utility and opening it again.
3. Type in any additional information you may have about this backup in the Comment box.
4. If you are planning on making changes to the Finance module on an off-site computer and applying those changes back to this computer, you may want to check out Finance. This will turn the Finance module red and will tell other users that any changes they make will be overwritten when the database is restored.
5. Clicking the Start button will create a backup of the database. The backup is stored in the root of the directory you choose.





Introduction to Membership *Training Manual*

Households

One of the first steps in using Shepherd's Staff is adding the Household records for your congregation.

The section defines Household records for you and teaches you how to add them.

Households and Person Records

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

- » **A Household record** represents the family's physical location and contains information that pertains to the entire family or group. This would include information such as the family's address, the landline phone number, or a household email address that all family members use.
- » **A Person record** represents the actual person (as opposed to a building) and contains information that is pertinent to that particular person as an individual. This includes, but is not limited to, information such as the person's baptism and confirmation dates, if they are a member, their cell or work phone numbers, and if they are married.

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

1. The Household record keeps all the family members grouped together for tracking and reporting purposes. For this reason, a Household record must be created prior to the Person records being created.
2. The following pages will walk you through adding households and people.

ADD a new Household

Household Name: _____ Household Type: Family Family: 0

Substitution for form letters: _____ Label name styles: _____

Family / Church Contact Other

Primary Address: _____ Address Location: _____

Alternate 1 _____

Alternate 2 _____

Alternate 3 _____

City / State / Zip: _____ Country: USA Carrier Bte: _____

Lat / Long: _____ County Code: _____ Description: _____

Type	Area	Number	Ext.	Listed	Description	...
PRIMARY	314			Yes		

Household E-mail: _____

Private

OK Cancel Save Done Done E-mail

ADD a Person

First: _____ Middle: _____ Last: _____ Suffix: _____ Preferred: _____ Title: _____

Household Name: _____ Sequence in Household: _____

Male Female

Church Contact Personal / Family Work / School Other

Member Non-Member

Participation: _____ Membership Code: Full Member Baptized Confirmed First Communion User-defined 3

Received By: _____ Date Received: _____

Removed By: _____ Date Removed: _____

Employment

Sunday School Grade: _____ Section: _____ Envelope: _____

Ministry Group: _____ Person Assigned: _____ Register #: _____

OK Cancel Save Done Done E-mail Text



Household Grid

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

From here you can quickly access a highlighted household's Address/Phone, Visits and Deaths through the tabs at the top of the grid.

Address/ Phone Tab—This tab shows you the household's contact information along with the people within that household. The information can be updated by editing the Household or Person records. You can also print a mailing label for, send an email to, or see a map of this household.

Visits—On this tab you will see any Visit records that have been entered for this household. If you wish to add, edit, or delete a record, you can do so using the buttons at the bottom.

Deaths—Any deaths that have happened for this household will show on this tab.

You also have access to all the standard grid conventions and buttons like unlock and export to a spreadsheet. See the Grid Conventions in the start of this manual for instruction on those grid features.

- Names can be found quickly by starting to type the name of the household. To highlight a record, single-click on a record.
- To access a Household's information on a tab, simply select the Household, then click the tab at the top of the grid. A tab that is shaded means there is no data on that tab for that record.
- By default the Household Grid does not show household's containing only removed people. If you wish to see these households, you can click on the "Include removed households" in the bottom left corner.

Households				Address/Phone		Visits		Deaths	
Name	Name of Head	Type	People	Ministry Group	Person Assigned	Newsletter	Label 1	Label 2	Salvation
▶ Abbott	David Lawrence	Adults/Children	4			<input type="checkbox"/>	Mr. & Mrs David	David and Sue Abbot	David and Sue
Baxter	Sally L	Single Parent	3			<input type="checkbox"/>	Ms. Sally Baxter	Sally Baxter	Sally
Belton	Troy James	Adults/Children	4			<input type="checkbox"/>	Mr. & Mrs. Troy Belton	Troy and Kira Belton	Troy and Kira
Benedict	Timothy Ronald	Single Adult	1			<input type="checkbox"/>	Mr Tim Benedict	Tim Benedict	Tim
Billings	Julie A.	Single Adult	1			<input type="checkbox"/>	Ms. Julie Billings	Julie Billings	Julie
Bowen	Rick	Married Couple	2			<input type="checkbox"/>	Mr. & Mrs Rick Bowen	Rick and Claire Bowen	Rick and Claire
Brown	Howard Raymond	Single Adult	1			<input type="checkbox"/>	Mr. Howard Brown	Howard Brown	Howard
Callaway	Robert William	Single Parent	4			<input type="checkbox"/>	Mr. Robert Callaway	Robert Callaway	Bob
Carroll	Carmen Janice	Single Adult	1			<input type="checkbox"/>	Ms. Carmen Carroll	Carmen Carroll	Carmen
Carter	Teresa Wanda	Adults/Children	4			<input type="checkbox"/>	Mrs. Teresa Carter	Teresa Carter	Teresa
Chung	Brian H.	Adults/Children	3			<input type="checkbox"/>	Mr. & Mrs. Brian Chung	Brian Chung	Brian and Molly
Clayton	George Frank	Adults/Children	5			<input type="checkbox"/>	Mr. & Mrs. George	George and Jan Clayton	George and Jan
Collins	James Andrew	Nuclear Family	4			<input type="checkbox"/>	Mr. & Mrs. James	James and Erin Collins	James and Erin
Cook	Stanley Jeffrey	Nuclear Family	4			<input type="checkbox"/>	Mr. & Mrs. Stanley	Stan and Terri Cook	Stan and Terri
Culbertson	Frank L.	Single Parent	3			<input type="checkbox"/>	Mr. Frank Culbertson	Frank Culbertson	Frank
Dean	Arthur Nathaniel	Married Couple	2			<input type="checkbox"/>	Mr. & Mrs Arthur Dean	Art and Virginia Dean	Art and Virginia
Dowling	Arlene Kimberly	Single Adult	1			<input type="checkbox"/>	Ms. Arlene Dowling	Arlene Dowling	Arlene
Enriquez	Gisele	Single Adult	1			<input type="checkbox"/>	Ms. Gisele Enriquez	Gisele Enriquez	Gisele
Enrickson	David	Nuclear Family	4			<input type="checkbox"/>	Mr. & Mrs. David	David and Laura	David and Laura
Fernandez	Louis John (Lou)	Adults/Children	3			<input type="checkbox"/>	Mr. & Mrs. Louis	Lou and Pam	Lou and Pam
Forman	Kellie	Single Adult	1			<input type="checkbox"/>	Ms. Kellie Forman	Kellie Forman	Kellie
Freeman	Jason William	Single Adult	1			<input type="checkbox"/>	Mr. Jason Freeman	Jason Freeman	Jason
Gibson	Jonathan K. (Jon)	Nuclear Family	4			<input type="checkbox"/>	Mr. & Mrs. Jonathan	Jon and Chris Gibson	Jon and Chris
Gomez	Edgar Alberto	Adults/Children	3			<input type="checkbox"/>	Mr. & Mrs. Edgar	Edgar and Anita Gomez	Edgar and Anita

Include removed households

Close Add Edit Delete End Sort Unlock Print 85



Adding a Household

There are four ways to add a Household record:

- » Click the H+ button on the toolbar.
- » Click the Add button on the Household Grid.
- » Go to the file menu and click Add from the records>household pop out.
- » If you accidentally start adding a person first, you can click the House + button next to household name on the Person record.

In order to save a household (OK button) you must fill out all the fields with a blue heading. These are required fields and are needed by the software for a valid Household record. Although the majority of the fields are not required, the more thorough the data entry, the more useful the database. It is to your church's benefit to fill in as much information as possible.

Once the required fields have been filled in under the Contact tab, the Household is completed and can be closed. However, there is additional information that can be added to the Household record on the Family/Church tab and the Other tab.

1. The first step is to fill in the Household Name at the top of the window. Traditionally, the last name of the family or group would go into this field.
2. The Label Name Styles 1 and 2 are optional and are entered by the user. Some examples could be "Mr. and Mrs. Joe Smith" for Style 1 and "Joe and Jane Smith" in Style 2. The important part is that you keep these fields consistent throughout your Household records so that reports such as mailing labels are accurate. The field entitled "Salutation for form letters" works the same way.
3. The number in the Family box will calculate automatically as Person records are added to the household. If you don't see this field update, simply close the record and open it back up to see the correct number.

Type	Area	Number	Ext.	Listed	Description	B-A
PRIMARY	314			No		

Family Tab

The Family tab is where you can see the Person records within this Household record. You can also access the Visits Grid for this household as well as assign this household to a person, ministry group, or even the newsletter list.

1. The mini grid within this tab contains the Person records assigned to this household. By adding Person records here, the Household Name, Address and Phone will transfer to the Person record. For information on Person records turn to the section titled "Adding a Person Record."
2. This tab also contains option fields for Person Assigned and Ministry Group. Traditionally, the Person Assigned would be an individual or group that would be assigned for ministering to this particular Household. The Ministry Group is traditionally used for a geographic (or demographic) zone that this Household resides in. Both of these fields can be used in a different manner and are adaptable to the needs of the church.
3. Off to the right, there are two quick buttons to Visits and Scheduled Visits. These buttons will open the Visits and Scheduled Visits Grid filtered for the Visit records belonging to this household.
4. The Newsletter check box is used to recognize that this Household receives the church newsletter. A Subgroup can be created to include only those Households with this designation.

The screenshot shows a web application window titled "Add a new Household". The form contains several input fields and a table. The fields include "Household Name", "Household Type" (a dropdown menu), "Family" (a text box containing "0"), "Salutation for form letters", and "Label name styles" (two text boxes labeled "1" and "2"). To the right of these fields is a button that says "(click to add or edit a photo)". Below the fields is a table with columns: "Last Name", "First Name", "Sequence", "Age", "Member?", "Participation", "Cell Phone", "Bapt.", "Confirm", "Removed By", and "Birth". The table is currently empty. Below the table are buttons for "Add Person", "Edit Person", and "Delete Person". To the right of these buttons are buttons for "Sched Visits" and "Visits". Below these buttons are dropdown menus for "Person Assigned" and "Ministry Group", a checkbox for "Receives Newsletter", a "Format" dropdown menu (set to "Print"), and a "Last Update" field. At the bottom of the form are buttons for "OK", "Cancel", "Add", "End", "Note", and "E-mail".

Contact Tab

The Contact tab contains the Address Fields/Phone Number and Email address for the Household as a group. The Primary Address is a required field and must be entered to complete the Household record.

Note: We understand that there are times you do not have a household's current address. In this case we recommend clicking the Address Unknown button to enter consistent "unknown" data into your software.

If the Household sometimes uses a different address (snowbirds, for example), click on the Alternate 1 button and key in the Alternate Address. These alternate addresses require Begin Use and End Use dates so that the software knows when to use these addresses. If this household relocates every year during the same time, make sure to click on "Repeats Annually" so you can take advantage of Shepherd Staff's "Renew Expired Information" utility which is covered in the Advanced Membership Manual.

The Household Email Address is for an email that is pertinent to the entire household. This could be a household email that all family members can use or it could be the address of the church's "contact" person within that family.

A Primary Household Phone Number can also be entered on this tab. This field is normally used for a landline phone number that is used for the entire household. Cell and work phone numbers should be entered on the individual Person Records as there are specific fields designated for those numbers.

The screenshot shows the 'Add a new Household' window with the 'Contact' tab selected. The interface includes the following fields and sections:

- Household Name:** Text input field.
- Household Type:** Dropdown menu.
- Family:** Text input field with '0' entered.
- Salutation for form letters:** Text input field.
- Label name styles:** Two numbered text input fields (1 and 2).
- Address Section:** Includes radio buttons for Primary, Alternate 1, Alternate 2, and Alternate 3. Fields for Address, City / State / Zip, Country, Carrier Rte, and County Code. A 'Description' field and a 'Last Update' dropdown are also present. An 'Address Unknown' button is located to the right.
- Phone numbers for the above address:** A table with columns: Type, Area, Number, Ext., Listed, Description, and a dropdown arrow.
- Household E-mail:** Text input field with a 'Private' checkbox below it.
- Buttons:** 'Note', 'Map', and a home icon button.
- Footer:** 'OK', 'Cancel', 'Add', 'End', 'Note', and 'E-mail' buttons.

Other Tab

The household Other tab is used for any information you wish to track for which Shepherd's Staff does not have a field or grid. The names of these fields can be changed to fit your needs.

There are a few criteria you should keep in mind prior to using the Other tab.

- » This data should be consistent across all of your Household records.
- » This data should have criteria that does not change very often.
- » This data should be something unique that cannot be tracked more easily elsewhere in the software.

It's recommended that if you have information that you want to track using the Other tab that you contact Shepherd's Staff Support prior to setting it up so we can let you know if there is a better alternative.

1. In order to change the names of these fields you will need to go to the opening page for Shepherd's Staff, select Utilities, and then choose Settings.
2. In Settings you will choose the tab called Field Names.
3. Choose the field name you want to change from the dropdown box.
4. Now type what you want the field to be named in the Change To box.
5. Click Accept to make the change.

The screenshot shows a software window titled "Add a new Household". The window is divided into several sections. At the top, there are input fields for "Household Name", "Household Type" (a dropdown menu), and "Family" (a numeric field with "0" entered). Below these are "Salutation for form letters" and "Label name styles" (a list with two items). A horizontal tab bar at the bottom of the main form area has three tabs: "Family / Church", "Contact", and "Other", with "Other" currently selected. The "Other" tab contains a grid of three rows and three columns. The columns are labeled "Option", "Text", and "Date". Each row has a dropdown menu for "Option", a text input field for "Text", and a date input field for "Date". To the right of the grid is a "Map Block" section with a table structure for "Page", "Row", and "Column". At the bottom of the window is a toolbar with buttons for "OK", "Cancel", "Add", "End", "Note", and "E-mail".