

StewardSoft^{church}

Online List Manager

Users Guide



StewardSoft™ Online List Manager Users Guide

© 2015 StewardSoft™, All Rights Reserved

Information in this document is provided in connection with StewardSoft™ products. No license, express or implied, by estoppel or otherwise, to any intellectual property rights is granted by this document. StewardSoft™ assumes no liability whatsoever, and StewardSoft™ disclaims any express or implied warranty, relating to sale and/or use of StewardSoft™ products including liability or warranties relating to fitness for a particular purpose, merchantability, or infringement of any patent, copyright or other intellectual property right. StewardSoft™ may make changes to specifications and product descriptions at any time, without notice.

StewardSoft, StewardSoft.church, StewardSmart, StewardSmart Toolset and StewardSmart Validator are trademarks or registered trademarks of StewardSoft or its subsidiaries in the United States and other countries.

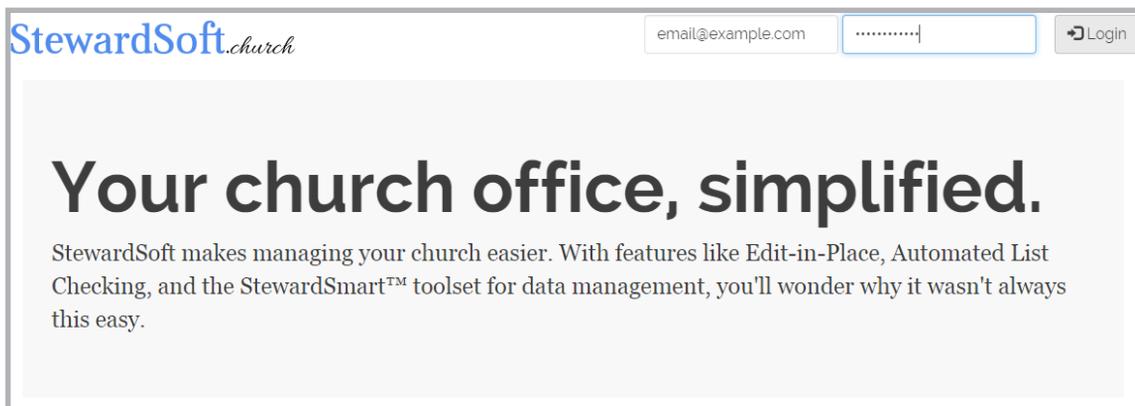
Table of Contents

1	<i>Accessing the site and logging in</i>	1
2	<i>Home page</i>	2
	Finding envelope order information and deadline	2
3	<i>Family management</i>	3
	Family List Page	3
	Edit Family Information	6
	Add a Family	8
4	<i>Exporting Family Data</i>	9
	Filtering, Sorting, and Exporting Data	9
5	<i>InstaSets</i>	10
	Order InstaSets	10
	View Ordered InstaSets	11
6	<i>Family Details</i>	12
	Edit Family Details	12
	Multiple Addresses	13
7	<i>Envelope Lists</i>	15
	Edit Existing Lists	15
	Multiple Envelope Lists	16
	Add Envelope List	17
	Add/Remove Families	18
8	<i>Settings/Errors</i>	19
	Change Settings	19
	Reporting Errors	20

1 Accessing the site and logging in

Thank you for choosing StewardSoft™ for your online list management needs. This guide will give you a quick overview of the features of the software. Begin by accessing the site and logging in with the credentials you were supplied.

Open the web browser on your computer, laptop, tablet, or phone, and navigate to the website stewardsoft.church.



Enter the login credentials you were given. Then click the [Login](#) button.



Whenever you perform actions on the site, you'll see notifications in the lower right corner to inform you of the status. If you've entered your credentials correctly you will see a green, "success" notification and the Login button becomes a Logout button. Otherwise you will see a red "error" notification.

2 Home page

Once you've logged in, you'll be taken to your home page. This page displays information about your church and your envelope order.

You can see the frequency with which you receive envelope mailings (monthly, bi-monthly, quarterly, etc.), the months your mailings begin, the next mailing month, and the deadline for changes to your list before that mailing.

StewardSoft.church [Home](#) [Families](#) [Groups](#) [Settings](#) [Help](#)

Welcome to StewardSoft, your online list manager!

Your church information

Von-Waelchi Church
7950 Collins Common
North Lauryville, RI 01183

Your envelope information

Mailing frequency: Feb Quarterly
Months envelopes are received: Feb May Aug **Nov**
Next mailing: November
Deadline for changes: September 15

In the example above, the church gets quarterly mailings and the first envelope of each mailing is dated for February, May, August, or November. Their next mailing will be for August and the deadline to make changes for the August mailing is June 20.

3 Family management

Click on the **Families** link in the top navigation

StewardSoft^{church} Home Families Groups Settings Help Logout

Families Changes will take effect next mailing (November)

Actions	Env Lists	Env #	Family Name	Address	Apt / PO	City	State	Zip
	Regular	4	Reichel Prof. Suzanne Reichel	8554 Barrows Plaza	empty	Borisside	OR	22597
	Regular	309	O'Hara Dr. Justus O'Hara	81876 Ava Club	empty	West Darrell	FL	09249
	Regular	488	Koelpin Dr. Trinity Koelpin	9196 Era Turnpike	Suite 493	Zemlakville	RI	75318
	Regular	99	Rau Prof. Tara Rau	1855 Kathryne Forges	empty	Doloresburgh	LA	87421
	Regular	206	McCullough Mrs. Darrien McCullough	674 Kling Track	Apt. 541	Zackeryton	TX	42415
	Regular	325	Price Mrs. Elaina Price	598 Daugherty Unions	Apt. 182	Westleybury	ME	08409
	Regular	459	Effertz Dr. Verna Effertz	772 Dicki Village	empty	Hayestown	MI	47424
	Regular	152	Fay Miss Keira Fay	1094 Monahan Way	empty	Julinton	SD	26272
	Regular	30	Wiza Mr. Lisa Wiza	714 Adaline Stream	Apt. 568	Port Isaac	OK	99729
	Regular	173	Walter Ms. Madie Walter	96954 O'Hara Creek	Suite 110	Kulasfurt	KY	74438

Search: Add New Family Export to Excel Export to CSV

« 1 2 » 1 - 10 displayed, 499 in total

The Family List page

The Family List page is the hub for family management. We have tried to make everything you'll need available on one screen without being cluttered or confusing.

Notice at the top of the screen is the same deadline information as the home screen - since this is before the deadline of June 20, changes made will take effect in the August mailing.

Finding families - filtering and sorting

The Family List page shows a list of all of your families when it first loads. You can see only 10 families in the list (this number can be changed – see the Settings section). In the lower right corner you'll see buttons to navigate through the pages of families along with the current page and the total number of families.

Moving through these pages to find a particular family could take awhile, so we've built in filtering and sorting tools to help you find exactly who you need in the shortest amount of time. These are the first of our StewardSmart Toolset™.

At the top of each column, you'll see an input box or drop-down selector. Typing in any of these input boxes will narrow the list down to only the families matching that search.

Env #	Family Name
<input type="text" value="11"/>	<input type="text"/>
117	Bernier Dr. Augustus Bernier
110	Trantow

For example, you can enter an **envelope number** to search for a family.

In the example, we've searched for envelope number 11. This shows us families with envelope numbers 11, 113, 311, 115, and so on - any number containing "11". We can further organize the list by sorting on the column. Click the arrow above any column to sort the records by that data.

Env Lists	Env #	Famil
<input type="text" value="Regular"/>	<input type="text" value="11"/>	<input type="text"/>
Regular	11	Schuster Mrs. Zelma Schuster
Regular	110	Kuphal Mr. Ettie Kuphal
Regular	111	Hintz Prof. Orlando Hintz

Click on the arrow above **Env #** to sort the families in envelope number order. Click the arrow again to reverse.

You can filter on multiple columns and sort at the same time, making it incredibly simple to find the exact family you need.

Env #	Family Name
11	ha
110	Kupna Mr. Ettie Kupna
112	Hansen Prof. Brian Hansen
113	Hahn Dr. Keon Hahn

Type a partial name in the **Family Name** or any other column to further narrow the list.

Global filter

There is another input box in the lower left corner of the list. This is the Global Filter, another piece of the StewardSmart Toolset™, and is the simplest way to narrow your list. Simply type in the box and StewardSoft™ will search in ***every column*** of the table. Try entering a last name, envelope number, zip code, or anything else.

Actions						
  	Regular	108	Wintheiser Miss Keaton Wintheiser	8381 Rosalind Squares	Apt. 547	Berlin town
  	Regular	116	Ernsner Prof. Pablo Ernsner	7313 Lilla Centers	empty	South Berni
  	Regular	117	Bernier Mrs. Augustus Bernier	72764 Lind Terrace	Apt. 599	Port Kieranland
  	Regular	329	Bernhard Mrs. Albert Bernhard	5322 Gusikowski Brooks	Apt. 286	Lake Anabel
<input type="text" value="berni"/> Add New Family Export to Excel Export to CSV						

Type a partial last name, envelope number, zip code, or other data into the **Global Filter** to quickly narrow your list.

Editing families - click to edit

StewardSoft™ has been designed to make managing your families as easy as can be. Notice that all of the data in the list is blue with a dotted underline. This style of text signifies that an item can be changed with our Edit-In-Place tool, another piece of the StewardSmart Toolset™. Simply click (or tap, on your mobile device) on any item and it will become an input, ready to take your changes.

s Bernier	94364 Leuschke Isle	empty	Lake Abigail	ND
---------------------------	-------------------------------------	-----------------------	------------------------------	--------------------

Click on an address in the list to edit it with the **Edit-In-Place** tool.

ier	<input type="text" value="94364 Leuschke Isle"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	empty
---------------------	--	-------------------------------------	--------------------------	-----------------------

StewardSoft™ is smart enough to stop you from saving bad data into your list. The StewardSmart Validator™ constantly scans your data in the background, looking for any inconsistencies. In addition, it checks any changes (or new data) you enter *before* it gets saved to the cloud and alerts you if anything needs corrections.

<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address cannot be empty		

Try to save an empty address and verify that the **StewardSmart Validator™** stops you from saving bad data.

If you try to save good data but something else goes wrong - e.g. your internet connection goes down - StewardSmart™ will show you a red “error” notification and the Edit-In-Place tool will still be visible. Once StewardSmart™ receives a message from the cloud that the data was successfully saved, you will see a green “success” notification and the Edit-In-Place tool will disappear.



2113 Maple Avenue	empty	Lake Abigail
8381 Rosalind Squares	Apt. 547	Bernietown

Envelope number selection

One of the most common and often frustrating tasks is choosing an envelope number. What numbers are available?

StewardSmart Toolset™ gives you the envelope number dialog. This dialog is used everywhere you can set an envelope number.

At a quick glance, you'll see the lowest and highest numbers used in your list and quick picks for the lowest available number, as well as adding to the end of the list.

Assign from unused envelope numbers

Quick pick:
 Lowest Used #: 3
 Highest Used #: 499
 Lowest Available #: 9
 Add to end: 500

Available numbers:
 Between and

0	1	2	9	10	20
21	23	35	39	41	42
46	57	70	94	108	117
146	157	184	195	200	201
202	211	212	217	225	229
230	236	250	253	258	267

These quick picks allow you to choose common numbers quickly - lowest available or add to the end of the list

In addition, we have provided a quick search tool so you can see a list of numbers in a range you specify.

Enter a begin and end number to find available numbers within a certain range.

Assign from unused envelope numbers

Quick pick:
 Lowest Used #: 3
 Highest Used #: 499
 Lowest Available #: 9
 Add to end: 500

Available numbers:
 Between and

94	108	117	146	157	184
196	200				

State selection

StewardSmart™ also includes a state search box which allows you to search by full state name or abbreviation.

nd |

- IN Indiana
- MD Maryland
- ND North Dakota
- RI Rhode Island

Add a new family

At the bottom of the family list, next to the Global Filter, click the Add New Family button.

You'll notice that Envelope Lists and Envelope # are Edit-In-Place inputs.

Click "None" beside Envelope Lists and then choose Regular to add the new family to your envelope list.

StewardSmart Validator™ warns you that a family must have an envelope number to be on an envelope list.

Click None beside Envelope # and then choose an envelope number for the new family.

StewardSoft™ will then remind you of the date the new family's first envelope will arrive. If you want us to send out a set of envelopes within a couple days, just click to order an InstaSet™.

Fill in the rest of the information for the family. StewardSmart Validator™ will check as you go.

StewardSmart™ will not allow you to save bad data. As you enter the family's information, it will notify you of any invalid information. You will not be able to click the Add New Family button until the data is correct.



4 Exporting

Click on the **Families** link in the top navigation

StewardSoft.church Home Families Groups Settings Help

Narrow down your list and sort it - in the example, we're searching for all **Ohio** families and order by **envelope #**.

Actions	Env Lists	Env #	Family Name	Address	Apt / PO	City	State	Zip
							oh	
	Regular	72	Davis Mrs. Marvin Davis	1308 Batz Inlet	empty	New Roscoe	OH	50308
	Regular	76	Crist	70100 Abbott River	empty	South Demarco	OH	49548-3814

At the bottom of the list, click the **Export to Excel** or **Export to CSV** button.

(Note: iOS - iPhone and iPad do not support Excel downloads. Android support is dependent on the device but is generally good).

Export to Excel

Export to CSV

1

2

1 - 10 displayed , 13 in total

The filtered and sorted records download in a spreadsheet. In the example, we get all 13 records, not just the 10 visible.

File name: Families List 2015-06-17.xlsx

Save as type: Microsoft Excel Worksheet

5 InstaSets

Click on the **Families** link in the top navigation



StewardSoft.church Home Families Groups Settings Help

You've already seen that you can order an InstaSet for a new family to get them envelopes right away instead of waiting for the next mailing. But what happens if a family goes on vacation and returns with no notice? Or if a set of envelopes is lost in the mail?

You can use StewardSoft™ to order InstaSets for any family, new or existing. In the actions column, click the star button to order an InstaSet for an existing family.

	Order InstaSet	Regular	163
		Regular	186

Beside a family, in the **Actions** column, click the star button to order an InstaSet.

Order an Instaset

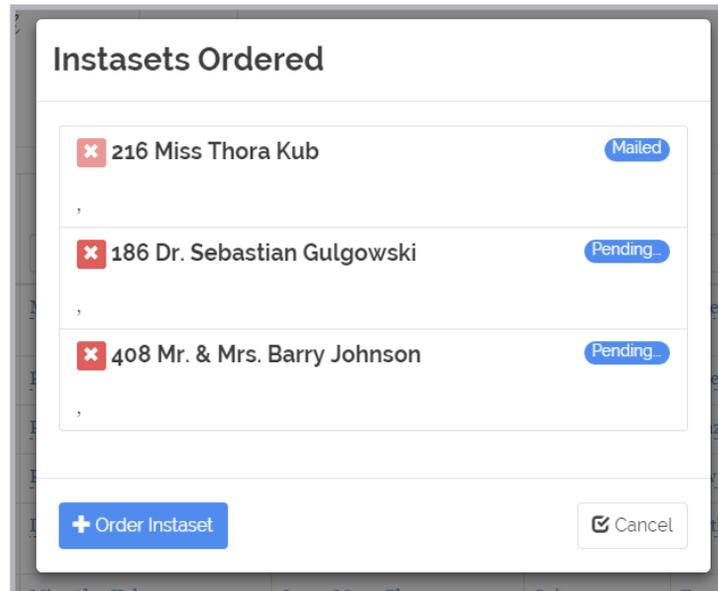
Env # / Family:

Family Name: Dr. Sebastian Gulgowski
Envelope Number: 186
Address: 70100 Abbott River
City/State/Zip: South Demarco, OH 49548-3814

Prof. Bartholome Ziemann 031 Candida Ranid lemnu Mraz

View Ordered InstaSets

After you click the Order InstaSet button, an order for a set of envelopes will be printed and mailed within 1 working day. You will then see the screen below which shows the InstaSets you have ordered and the status of them.



In the example, there are 3 InstaSets ordered and 1 set is mailed. You can cancel a set at any time before it is printed.



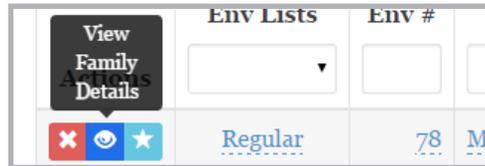
You can get back to the InstaSets list at any time by clicking [Settings](#) in the top menu then clicking the [View](#) button.

6 Family details

Click on the **Families** link in the top navigation

StewardSoft.church Home Families Groups Settings Help

Click on the eye button to view the **Family Details** page.



The Family Details page lets you edit more specific information for a family, including email and phone number, which doesn't appear on the simplified Family List page. In addition, you can add any number of addresses for a family and set the date range those addresses apply to. The first address is always the home address, cannot be deleted, and is the one that appears in the Family List page.

Reichel Family - Prof. Suzanne Reichel ★ Order InstaSet

Envelope Lists: Regular Envelope Number: #4 Groups: Regular
 Email Address: [email] ✉ Phone: (399) 439-3591

Addresses

Currently Active

8554 Barrows Plaza
 [address line 2]
 Borisside, OR 22597

Dates at address:
 [date to date]

Home Address

Add

New address

+

✓
✕

Family - Prof. Suz

Families with multiple addresses

Most churches will have some families with multiple addresses - whether they go south or west for the winter or have vacation homes during the summer. Some of your families may want to receive envelopes at their second address while they are gone, and others may not. We've designed StewardSoft™ to handle both of these cases simply without the need to have a separate envelope list for part of the year.

You have complete control over the time frame each address is active on a per-family basis. Let's assume the example family is going to their winter home on December 1st. Let's set that as the end date for their home address.

Set an address to end

Click *date* after "to" to set the end date. If a date is blank, the address is valid *forever* in that direction.

You can see in the example we've set the address to end on 12/01/2015. There is no start date, so this address is valid any time before that date, but not after. Likewise, with a before date but no end date, it is valid any time *after* the begin date.

The date picker, used on multiple pages, is designed for ease of use. Click the month at the top to zoom out to a year view, then click the year to zoom out to a decade view. You can use the arrow keys, too. Here are the shortcuts (note - "unit" refers to one square in the calendar and changes from day to month to year, depending on whether you're on a month, year, or decade view):

Arrows (↑ ↓ ⇐ ⇒) - *move the selection around one unit in any direction*

PgUp/PgDn - *move a page up or down in the calendar*

Home/End - *move to the first/last unit*

Ctrl+↑ / Ctrl+↓ - *Zoom the calendar view out/in*

Enter / Space Bar - *Select date*

Esc - *close calendar*

The image shows a sequence of four screenshots demonstrating the date picker interface. The first screenshot shows a form for 'Lake Emeraldmouth, ON' with phone number '91974-4318'. A 'Dates at address' field contains 'date to' with a blue arrow pointing to the 'date' text. Below is a calendar for June 2015. The second screenshot shows a zoomed-in view of the calendar for December 2015, with the date '01' selected. The third screenshot shows the 'Dates at address' field with '12/01/2015' entered and a blue checkmark button. The bottom screenshot shows the final state with the date '12/01/2015' in the field and a red 'Delete address' button below it.

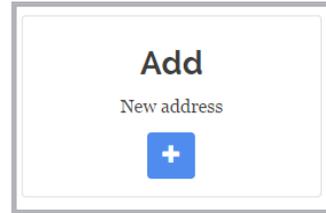
Add a secondary address

Click the **+** button to add an address for the family.

You can add as many addresses as you need for a family. Although there should only ever be one address that is active, based on the dates. The StewardSmart Validator™ checks the addresses and will display an alert in the Family Detail page if there are multiple addresses active.

The add address dialog is similar to the others you've seen. In the example, we'll set December 2 to be the begin date for the secondary address.

Fill in the secondary address and the begin date.



 A form titled "Add an address for the Beer Family" with a grey border. It contains several input fields:

- Address Line 1: 6226 Oak Blvd
- Address Line 2: Apt C
- City: New York
- State: New York
- Zip: 10002
- Begin Date: 12/02/2015 (with a calendar icon)
- End Date: (empty, with a calendar icon)

 At the bottom right, there are two buttons: a grey "Cancel" button and a blue "+ Add Address" button.

Now the family has two addresses. Until December 1 the first address will be active and any mailings will use that address. On December 2, the first address is inactive and any mailings after that will use the second address.

 A summary view showing two address cards side-by-side.

- Currently Active:** 8513 Muller Avenue, Apt. 705, Lake Emmaleemouth, OH 91974-4318. Dates at address: ~~date~~ to 12/01/2015. A red "Delete address" button is at the bottom.
- Currently Inactive:** 6226 Oak Blvd, Apt C, New York, NY 10002. Dates at address: 12/02/2015 to ~~date~~. A red "Delete address" button is at the bottom.

Click the **Delete Address** button to remove the second address for the family.

 A small dialog box with a white background and a grey border. The title is "Are you sure?". Below the title is a red warning box that says "Are you sure you want to delete this address? This cannot be undone." At the bottom, there are two buttons: a grey "Cancel" button and a green "Yes, delete the address" button.

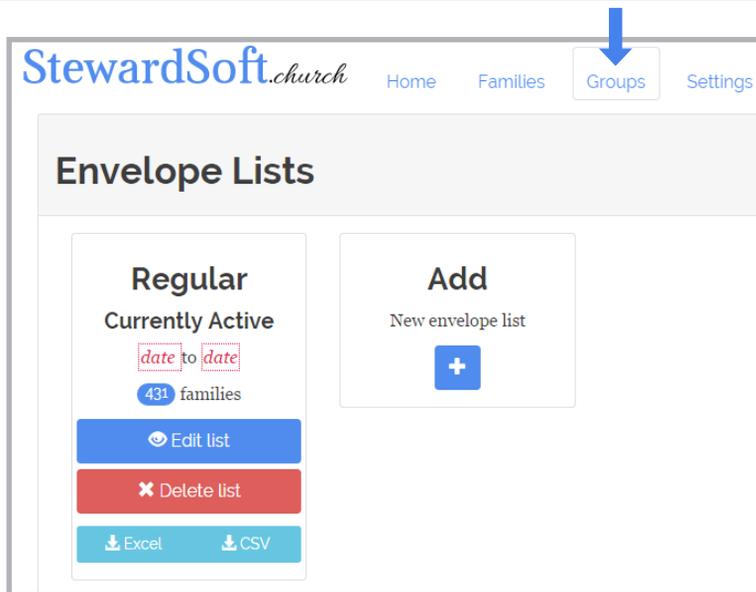
To clear a date, just click to edit it and click the **Clear** button in the calendar.

 A sequence of three small images showing date editing:

- A calendar grid with dates 26, 27, 28, 29, 30, 05, 06, 07. The date 27 is highlighted. Below the calendar are "Today" and "Clear" buttons.
- A date input field with "date" and "to" labels, a blue checkmark button, and a calendar icon.
- A "Dates at address:" label followed by "date to date" and a red "Delete address" button.

7 Envelope lists

Click on the [Groups](#) link in the top navigation



The Regular envelope list is created with your account and contains all the families that get your normal mailings.

You can add and remove families from the list by clicking the [Edit List](#) button, or individually by adding the list to or removing it from the family on the [Family List](#) page.

You can export a list of the families in any list by clicking the [Excel](#) or [CSV](#) buttons.

Multiple envelope lists

Some churches have secondary envelope lists for other purposes, which may not go to the same people. Here are two examples of secondary lists and why your church may want them.

Example 1: Pledge campaign for the Building Fund

Your church has a special campaign to raise extra capital for restoring your building. These pledges come from families who receive regular envelopes, but also from less active families, shut-ins, and others who aren't on the regular list. Your church wants to send a special set of Building Fund envelopes to only the families who pledged.

Example 2: Large number of Snowbirds or Vacationers

Your church has a large number of families who leave for a few months during the winter, or alternatively your church is in a warm climate and you have a large number of families who are only there for a few months. In these cases it may be easier to add these families to a separate Snowbirds/Vacationers list and turn the whole list on/off by date, rather than trying to set the dates of each family's address one-at-a-time. If you have a large number of families coming or going at relatively the same time, this is probably an easier solution. However, if the dates the families arrive or leave vary wildly, this may not be the solution for you.

Example 3: Easter and Christmas only list - or Special Offering only list

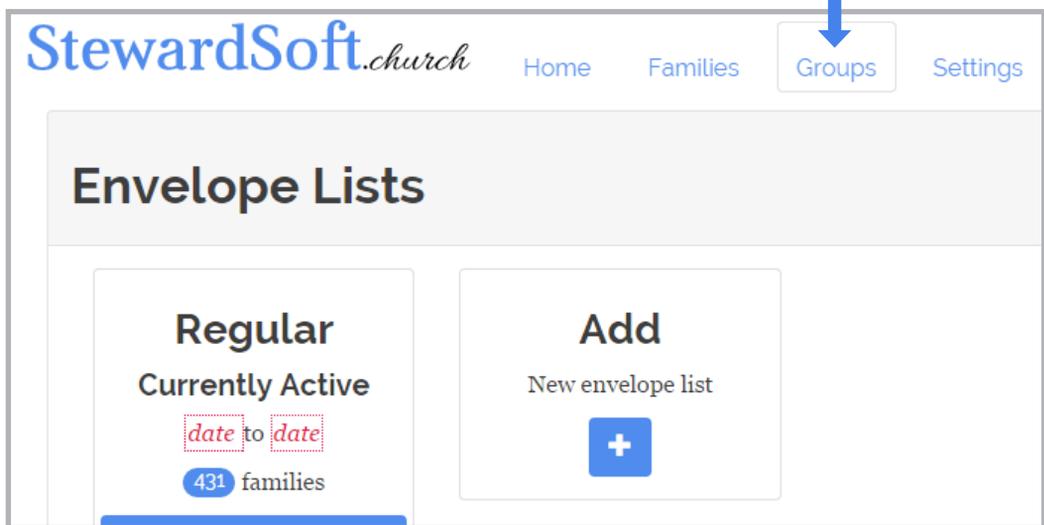
Another common scenario is that you have a large number of families who, for whatever reason, only come back to church at Easter and Christmas. Many churches will keep a second list of these families and mail out special envelopes during those times. Other churches keep a list of less active families, or electronic giving families, who don't receive the weekly envelopes but only receive the special offering envelopes.

Whatever your reasoning for having multiple envelope lists, StewardSoft™ has you covered.

NOTE: StewardSoft™ does not tell your envelope company to use multiple lists. *You will need to call your representative and let them know why you are using two lists and any other instructions.*

Add an envelope list

Click on the **Groups** link in the top navigation



Click on the **+** button to add a new envelope list

Fill in the list name and dates (if needed)

Add an envelope list

Envelope List Name:

Begin Date: 

End Date: 

Add/remove families from list

When you create a new list, or click the Edit List button, you'll be taken to the List Details page where you can add or remove families easily from the list.

On the left side (or at the top, if you're on a smaller screen like a mobile device) you'll see the families currently in the list with a search box. Similarly on the right (or below on smaller screens) there is a search box and list for families who are *not* in the list.

Search for a family in the [Add Families](#) search box

You can search for families by name or envelope number. Simply click the plus button to add the family to the list.

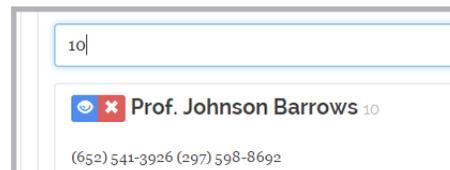
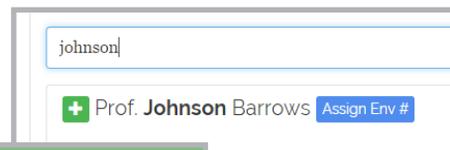
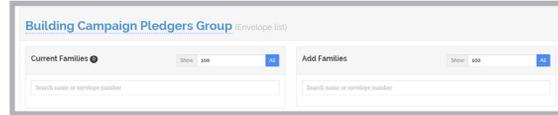
Click the **+** button to add them to the list

If the family doesn't have an envelope number, they can't be added to an envelope list - but you can simply click the Assign Env # button to give them a number, then you can add them to the list.

Click the [Assign Env #](#) button to give a family an envelope number so you can add them to the list

To remove a family from the list, simply search for their name or envelope number and click the X button.

Click the **X** button to remove a family from the list



8

Settings and Errors

Click on the [Settings](#) link in the top navigation

StewardSoft.church Home Families Groups **Settings** Help

Settings

Theme: Readable ▾

Items per page (families): 10

Automatically dismiss notifications? Yes

View Ordered Instasets View

The Settings page allows you to view and change settings related to your account. The Items per page setting allows you to increase or decrease the number of families shown, per page, on the Family List page. The Automatically dismiss notifications setting allows you to modify the behavior of the notifications you receive in the lower right corner. If you change this to NO, the notifications will not disappear on their own, but will have an X button to close them. You can also view your ordered InstaSets. And finally you can change the site's theme, if you want a different look and feel.

StewardSoft.church Home Families Groups **Settings** Help

Settings

Theme: Slate ▾

Automatic error catching

In order to create the best possible experience, StewardSoft™ includes a service that runs in the background watching for errors. If something goes wrong, we will detect it and send a notification of the error to the developers. If we need more information to help us nail down the problem, you may get a popup window like the image below, asking you to give us information about what you were doing at the time the error occurred.

We detected an error and we'd like to know more about it.

Please describe what you were trying to do. We will also gather some additional information to help fix the issue.

Type your message and click OK to send us the information. If you do not wish to send us any information, click Cancel.

It is highly recommended that you click REFRESH or press F5 to reset the application.

OK Cancel

And if you ever find something that doesn't function the way it is supposed to, you can click the Help link at the top and report a problem.

StewardSoft.church Home Families Groups Settings Help

About StewardSoft

Current Version: 0.9.3 (Released 2015-07-07)

Changes since last version:

- Bug fixes

From there you can view this User's Guide, send us comments, or report a problem.

Help Documents

- User's Guide

Contact Us

Use the form below to send us any comments or questions.

Email Address

Name

Message

Report a Problem

Use the form below to submit a problem report to the developers.

Email Address

Name

Category

Message

StewardSoft[™].church

This user guide is Copyright 2015 StewardSoft[™]. This information is confidential and contains legally privileged information, intended only for the use of the intended recipient(s). Any unauthorized disclosure, distribution, copying or the taking of any action in reliance on the information herein is prohibited. StewardSoft[™] is not responsible for errors or omissions in this guide and denies any responsibility for any damage arising from the use of this guide.