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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.
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.

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

![Image of the Families page](image)

**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.

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.

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.

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.

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.

<table>
<thead>
<tr>
<th>ws Bernier</th>
<th>94364 Leuschke Isle</th>
<th>[empty]</th>
<th>Lake Abagail</th>
<th>ND</th>
</tr>
</thead>
</table>

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

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.

| [ ] | 94364 Leuschke Isle | [✓] | [✗] | [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.

| [✓] | Success! Updated address |

<table>
<thead>
<tr>
<th>2113 Maple Avenue</th>
<th>[empty]</th>
<th>Lake Abagail</th>
</tr>
</thead>
<tbody>
<tr>
<td>8381 Rosalind Squares</td>
<td>Apt. 547</td>
<td>Bernietown</td>
</tr>
</tbody>
</table>
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.

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

State selection

StewardSmart™ also includes a state search box which allows you to search by full state name or abbreviation.
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.
Click on the Families link in the top navigation.

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

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).

The filtered and sorted records download in a spreadsheet. In the example, we get all 13 records, not just the 10 visible.
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.
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.
Click on the Families link in the top navigation

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.
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
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.

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.

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

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

**StewardSoft.church**

**Envelope Lists**

**Regular**
Currently Active

**Add**
New envelope list

Click on the + button to add a new envelope list

Fill in the list name and dates (if needed)
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
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.
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.

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.

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