



Church360° Members

Getting Started

Navigating the Login Screen

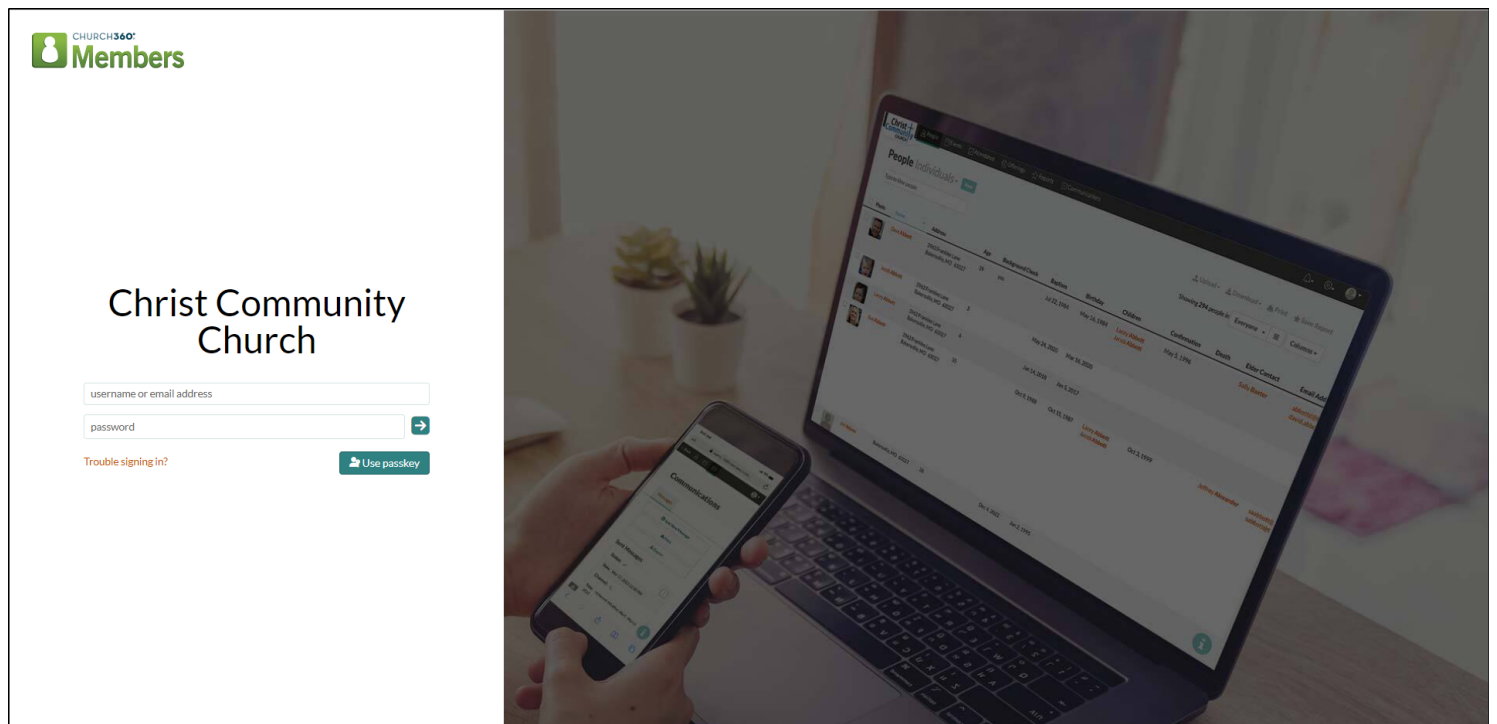
As a web-based software, your Church360° site is accessible to you from any device with an internet browser. To maintain security, each church's site will have it's own subdomain and URL.

Church360° Members has rolled out a new login page with a redesigned layout and passkey option, replacing the old format. The functionality of the login fields remain unchanged.

If you forget your password or lose your passkey device, you can click the "Trouble signing in?" link below the login fields to enter your email address and check that email account for an email containing instructions on how to reset your password or passkey option.

For more information on Passkeys, please visit our article [here](#).

Note: If you are not sure what your Church360° Members site URL or subdomain is, please reach out to us with your church name and zip code and we'll be able to look you up and send you that information.



Logging in for the First Time

After purchasing your Church360° Members subscription, you will receive an email from your software consultant or site administrator with a link to set up your account. If you do not see an invitation in your inbox, you may want to check your spam or junk folder.

If you are the one setting up the account initially, you'll need to set up your site and login together.

To create your site and first login,

1. Click "Set up your account now!"



CHURCH360°
Members

Welcome to Church360° Members for


Now you can manage your church member information with Church360° Members, the latest in web-based church management software. Get to know the people at your church and open new doors for ministry opportunities.

Set up your account now!

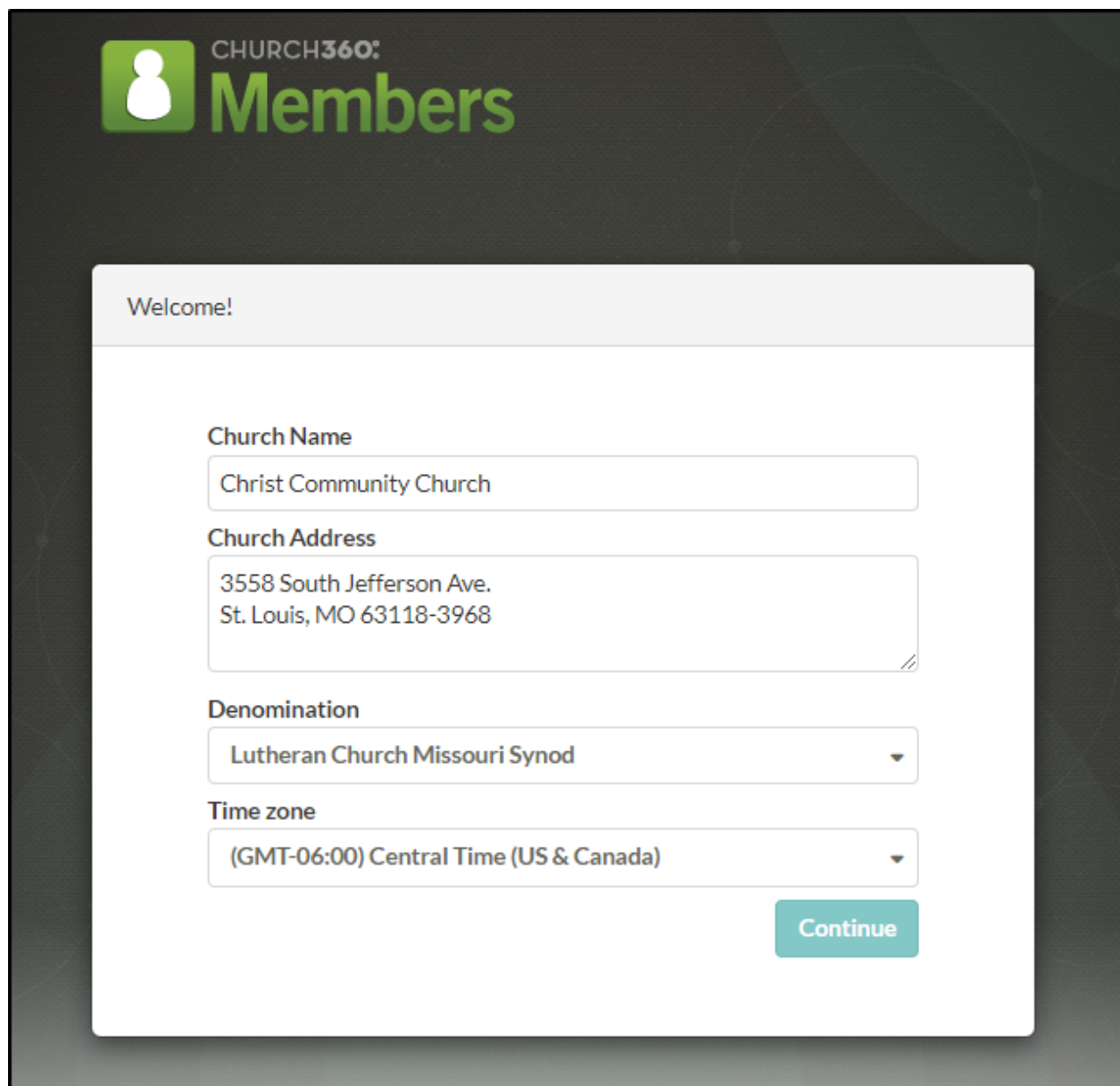
If you have questions along the way, we're here to help!

Concordia Technology Solutions
support@cts.cph.org
800.346.6120

If the above link did not work, just copy the link below into your browser to get things started:


2. Enter in your first and last name, email, and password.

3. If prompted, you can review and edit your church's name, address, denomination, and time zone. This can be edited later in Account Settings.



CHURCH360
Members

Welcome!

Church Name
Christ Community Church

Church Address
3558 South Jefferson Ave.
St. Louis, MO 63118-3968

Denomination
Lutheran Church Missouri Synod

Time zone
(GMT-06:00) Central Time (US & Canada)

Continue

If your site has already been set up, you'll only need to create your login.

To create your login,

1. Click "Set up account login now!"



Welcome to Church360° Members!

Hello

You're one click away from simple Church Management. Just follow the link below to set up your account (you will be asked to set up a password or passkey). Once logged in, you will find a host of resources to help you get moving quickly.

Set up account login now!

If for some reason you get lost along the way, we're here to help!

Blessings,
The Church360° Team
support@cts.cph.org
800.346.6120

If above link did not work, just copy the link below into your browser to get things started:

2. Enter your email address and click on the arrow button to confirm.
3. Under "How would you like to login?", choose whether you'd like to create a password or a passkey.
4. Depending on your choice, you'll enter and confirm your password or create a passkey on a device of your choice.
5. Once your chosen authentication is chosen, click the "Continue" button.

Once your user account has been created, you will be able to log in using the email address that you provided along with your password.

If you forget your password or wish to change it, you can click on the “Trouble signing in?” link on the Login screen. You'll be able to enter your email address and check your inbox for an email containing instructions on how to change your password.

Introducing Multi-Factor Authentication through Email

Over the years, Church360° has introduced various security updates to ensure only approved users have access to your Church360° site. These include additional password requirements, automatic logouts, password expiration [options](#), and the ability to use [Passkeys](#).

In addition to these security updates, starting in July, all logins used for Church360° will require multi-factor authentication.

With this update, users will enter their username or email address on their site's login page and choose between a password or Passkey option. If password is chosen, an email containing a one-time code will automatically be sent to the email address associated with the login. This one-time code will need to be entered into the login screen within five minutes to log in.

Since Multi-Factor Authentication through Email uses the user's Login email address stored on the [User Settings page](#), we encourage all users to review this email address before the July 8th changeover. In addition, Administrators should communicate with their Church office about this upcoming change.



Christ Community Church

An email has been sent to  containing a one-time code. Please enter the code below.



[Request a new code](#)

[Trouble signing in?](#)





Verify signing in to Church360°

Hi [REDACTED]

Use the code below to verify your sign-in request to Church360°. The code will be valid for **5 minutes**.

713409

Remember, never share your code with anyone.

If you weren't expecting this email, your account is still protected, as the above code is required to log in. As a best practice, you can update your password and sign out of all devices in your Church360° User Settings. Need help? Our support team is here if you need it.

Blessings,
The Church360° Team
support@cts.cph.org
800.346.6120

If users receive a one-time code message but have not logged in recently, it is recommended that they reset their password and sign out of all devices from their [User Settings](#) on their site.

Introducing Passkeys

We at Concordia Technology Solutions value giving churches a high level of quality software as well as implementing the highest grade of security for your congregations data.

For that reason, though we've been blessed to never suffer a breach of data, we've rolled out a new form of authentication for Church360° Members sites called Passkeys to better guard against malicious actors that would seek to steal your congregation's data.

Passkeys is a new form of two factor authentication that completely negates the use and need for a password. So no more remembering passwords for your Church360° Members site. You'll simply go to your site, request access, and grant that access directly from your own device, which can be a phone, tablet, or password manager.

Passkeys is a paradigm that is incredibly new. It's what techies call "bleeding edge" which is more forward thinking than "cutting edge". So this concept is fairly new and has been slowly implemented into well known software tools and sites like Microsoft, Google, and Apple in 2023. And slowly, you'll see other sites start to offer this option as well.

So what are Passkeys?

Passkeys are a pair of keys, one public (a key that is used for verifying your request to access a site) and one private (secret and unique to only your device). These keys are tied to the domain where they are created, in this case, the church360.app domain).

Each passkey requires secure context (beginning with https) and is tied to a single domain so there is no repeated use like someone could do with a password.

When you log in using a passkey, the server for the domain will send an encrypted prompt called a challenge to a device that you own. You use that device to automatically answer the challenge and to allow access. The private key that is attached to your device never leaves it so this adds an extra level of security.

The only exception to this last notion is if you are syncing using iCloud, Google, or another password manager, which allows multiple devices access to the private key. However, this still means the private key is kept under your control, not shared with the internet.

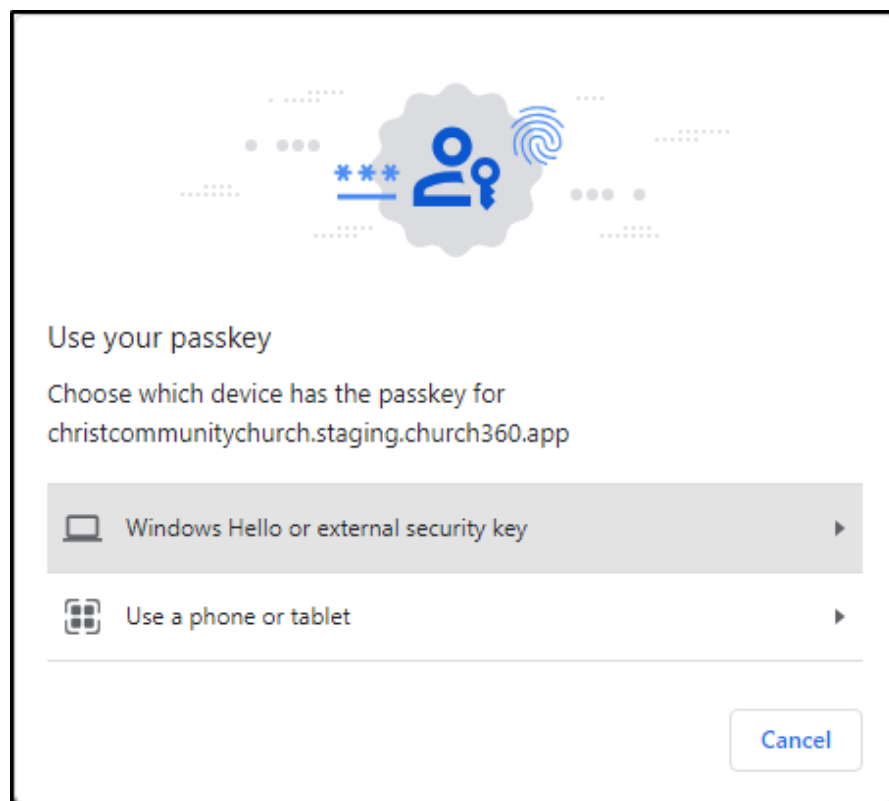
That's a lot of information that might still be tech jargon for right now so let's compare it to passwords, something most people are fairly familiar with.

When using passwords, you go to the site and enter in your password into the login screen. This attempt is sent to the server that checks your password to make sure it's correct. If it's correct, it allows access. If it's not correct, it'll be rejected.

When using passkeys, you go to the site and press the button to use a passkey. This triggers an event where a challenge is sent automatically from the server to the browser, without the additional action of entering a password. The browser then sends this question securely to your authentication device, which verifies your identity and then uses the private key it has stored to answer the challenge. The answer to the challenge is then sent back to the server where the server uses the public key to verify that the challenge was correctly answered. If the answer is correct, you are allowed access. If it is not, you are rejected.

What you see on your side is similar to other 2FA methods where you try to access the site, you approve access from your device, and you are in.

This is a new paradigm and will take some users some time to get used to so we at CTS are happy to help with any questions you may have when accessing your site using this new method.



Common Questions on Passkeys

With the new paradigm introduced with the implementation of Passkeys, many questions have arisen in regards to how this will affect users in relation to using Church360° products.

Does Church360° require the use of Passkeys? Can administrators require it for other users?

At this time, the use of Passkeys is not required to use Church360° Members and there is no way for administrators to require users to use Passkeys only. If you would like to see these enhancements please submit feedback.

How will this affect new users invited to my Church360° site?

Users will still be able to create login accounts with passwords as they have done previously. If they desire a Passkey, they can go to their User Settings and create a Passkey option and delete their password, if they choose.

Does this affect anything with Church360° Ledger or Church360° Unite?

Church360° Ledger and Church360° Unite do not have the capability for Passkeys at this time so users of these products will experience no change in their login process.

What is a passkey device? What options do I have?

Users can use any smartphone, tablet, password manager, or biometrics capability that currently supports Passkeys. Phones and tablets that have cameras can read QR codes to grant access to a Passkey-enabled website. A password manager like Google Password Manager or iCloud Keychain can save a Passkey like a credential where devices and computers on the same password manager account can share Passkeys amongst themselves. If a device has a biometrics option, an external key like Windows Hello or a physical security key like a USB, a Passkey can be attached to it and be entered into different devices to grant access.

I access Church360° Members at church and at home using different computers. How would Passkeys work in this situation?

If you access Church360° Members using multiple computers/devices, it's recommended to use a device like a phone that you carry with you or use a password manager installed/signed in on each computer or device that you use for Church360° Members.

Does this passkey challenge occur on each login occurrence?

Yes, just like asking for a password when you access a website, a challenge will occur each time you log into Church360° Members. A challenge will appear as a prompt to your password manager or a QR code for your phone or tablet to scan. You'll be asked on the Passkey device (not the computer you are accessing) whether access should be granted. Follow the prompts for your device to confirm access.

Best Practices for Passkeys

Passkeys are a groundbreaking new concept set to revolutionize and build upon current ideas on two factor authentication.

Instead of using a password, users can now use a device or password manager to instantly grant access to your frequently visited sites.

With new paradigms comes best practices on how to better manage your passkeys, which we've gathered here for your reference.

- Treat your device as your key - This is already the case if you store passwords on your phone or mobile device, but your passkeys are only as secure as the device on which they're stored. Bad actors can't phish or recreate your passkeys, so their only option is to try and steal or gain access to your device. Make sure your device is safe and protected by a strong passcode, which you shouldn't share with anybody.
- Remember which device houses your passkeys - To make accessing your sites easier, you'll want to remember which devices you have designated for different passkeys. Some users may prefer to have a single device to contain all of their passkeys to better know which passkeys need to be regenerated if the device becomes lost.
- Try to choose passkeys when available - Passkeys have encryption tools that allow for better security. A thief will never be able to guess it as it is tied strictly to your device.
- Make sure your browser and devices are up-to-date - To use passkey features, your internet browser and device must be updated to supported versions. Published requirements of passkeys include:
 - Computers running at least Windows 10, macOS Ventura, or ChromeOS 109
 - Mobile devices running at least iOS 16 or Android 9
 - Hardware security keys that support FIDO2 protocol
 - Browsers running at least Chrome 109, Safari 16, or Edge 109 (other browsers may be supported)
 - Devices with Screen lock and Bluetooth enabled
 - Apple devices with biometric options like fingerprint or face scanning enabled

Navigating your site

Primary Navigation Bar

When using Church360° Members, you will need to use the Primary Navigation bar to the left of your site to access the different features and utilities available to you.

For more information on the new navigation bar, please visit [this article](#).

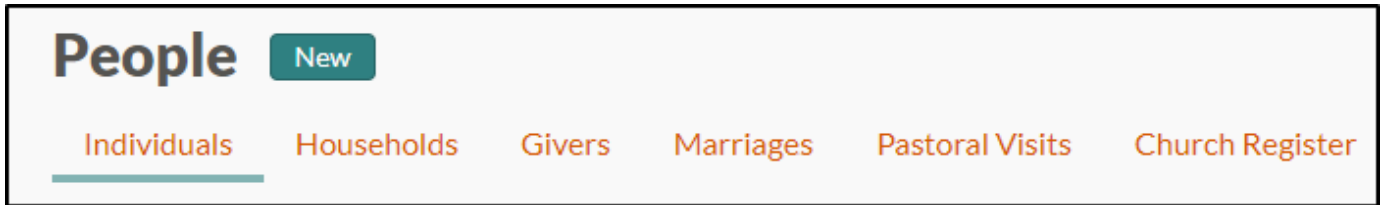
Depending on your Role permissions, some sections or features may be unavailable to you.

From this bar, you can access the different areas of Church360° Members: People, Events, Offerings, Communications, Finance, Reports, and Settings. Further down, there are icons for your User Profile (designated by your login name), User Settings, and the Logout button.



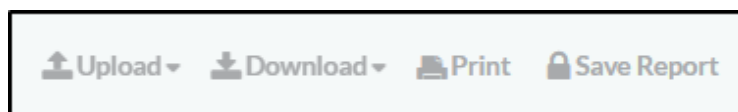
Headings

Each view will have bold text directly under the Primary Navigation Bar marking the area you are currently seeing. Some views will have subheadings under to the heading that allows for other viewing modes.



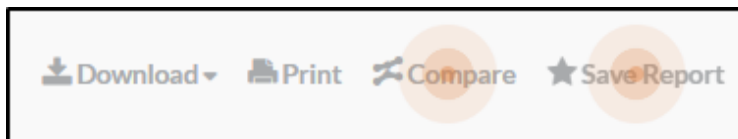
Action Buttons

In each view, there will be buttons located in the top right corner of the view. Each view will allow for different tasks.



Beacons

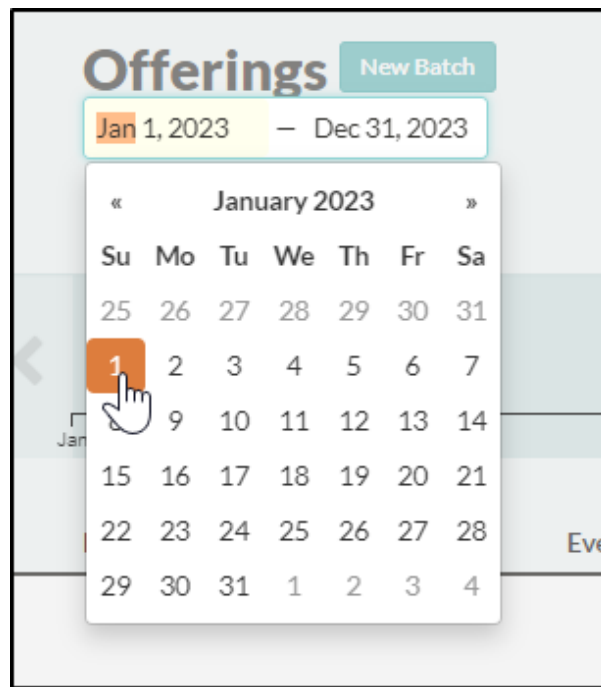
When starting to explore your Church360° Members site, you may see orange blinking lights on certain buttons or links. These are used throughout the site to help indicate a helpful tip or suggested next action. After the light is clicked, you can dismiss the notification to make the beacon disappear forever.



Date Selection

When using reports or views, you may want to select a certain date range to show. Clicking on the date picker (typically located under the view heading, if it's available) allows you to select a specific date range using a drop-down calendar. On some views like Attendance or Offerings, you can also use the bar graph to select dates by moving the brackets to house the range you are looking for.

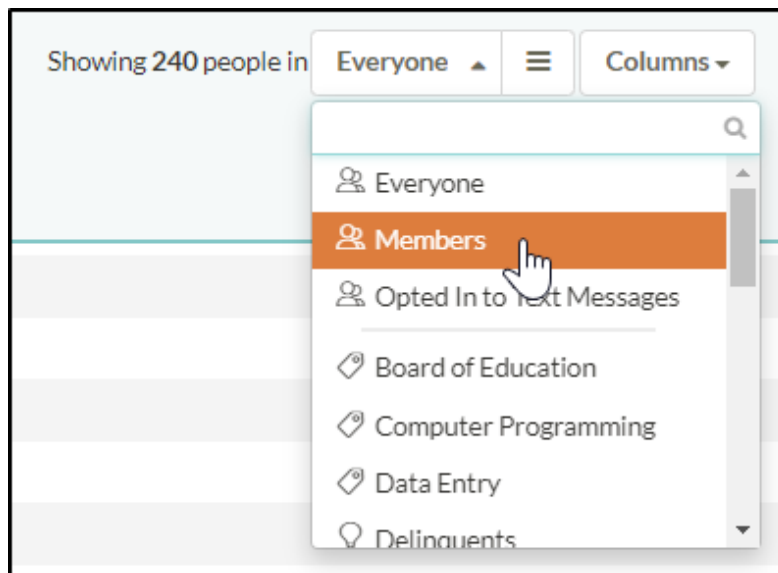
To avoid large amounts of data creating lagging, date ranges are limited to 18 months.



Drop-Down Menus and Smart Group Traits

Views also offer options on the right to filter information for certain individuals who match specific criteria. You can use drop-down menus to select what people to select and which columns to show.

Furthermore, a drawer menu can be accessed by clicking on the three horizontal lines next to the drop-down menu. This drawer will allow you to choose Smart Group traits to filter the view of people included.



Help Icon

At the bottom right corner of your site, clicking the small blue circle with a white "i" allows you to search for help articles, chat with a technician, or send CTS an email message directly from your Church360° Members site.

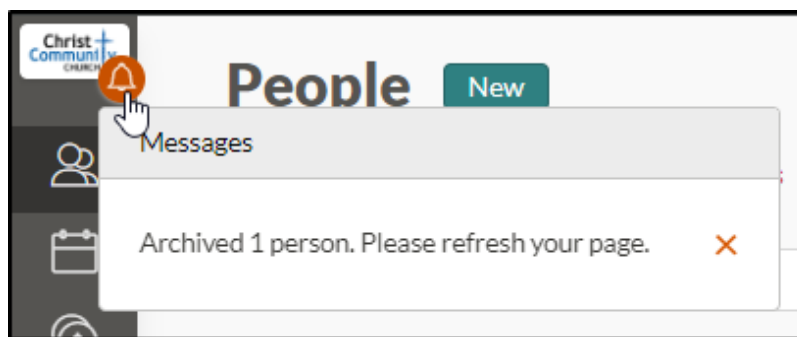


Message Center

Marked with an orange bell icon, notifications will appear on your church logo at the top of your navigation bar when automatic tasks or reports have been generated or there are upcoming software updates.

Messages work on a per-user basis; meaning each user has control over their own message center. Dismissing a message will only close it for your own login while others will still get the message until they dismiss it. Once a message is deleted, it cannot be recovered.

Once all notifications have been dismissed, the bell icon will turn black.

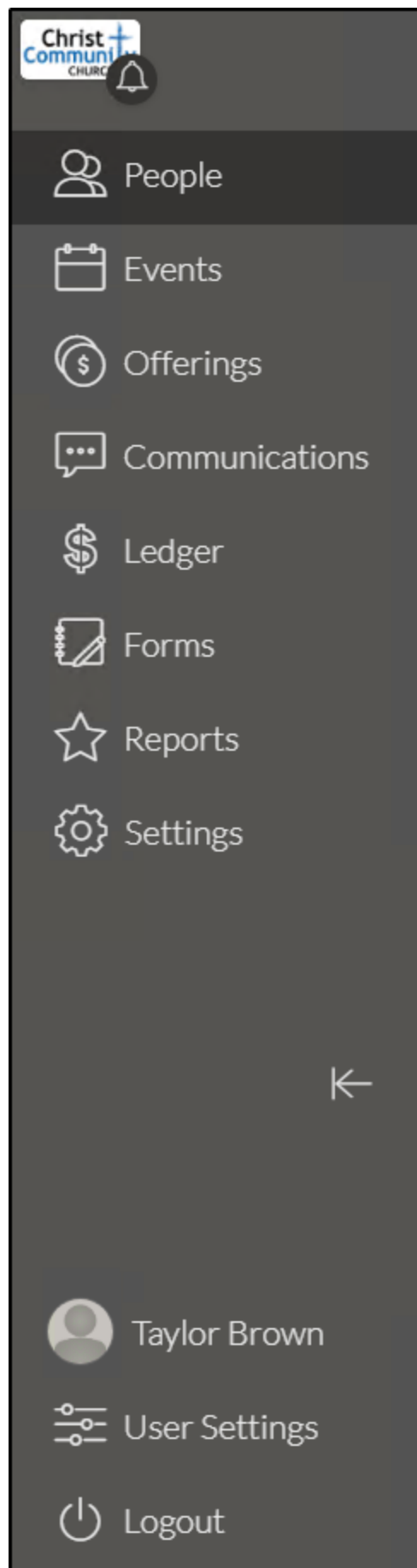
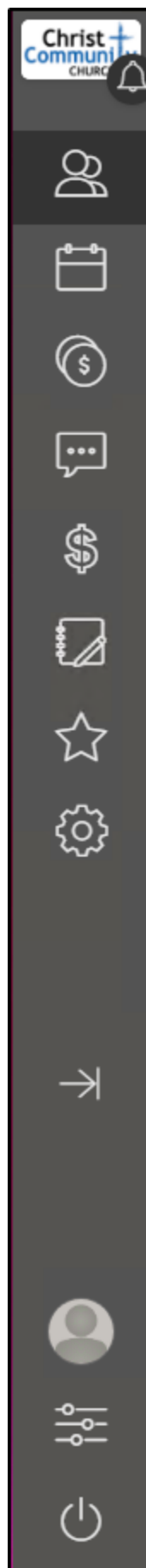


Using the Navigation Bar

Church360° Members offers a primary navigation bar to access the different features and utilities available to users.

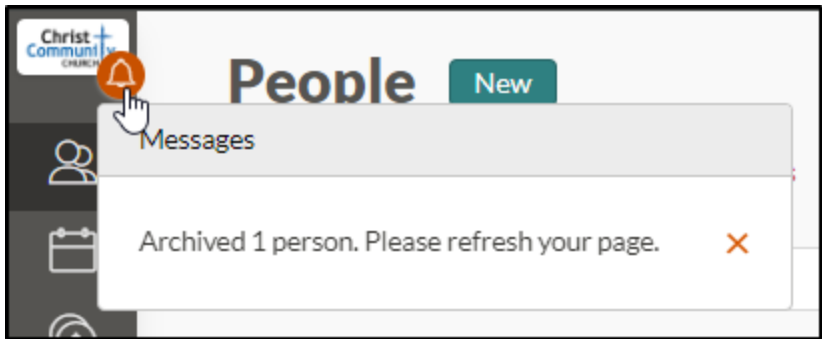
From this bar, you can access the different areas of Church360° Members: People, Events, Offerings, Communications, Ledger, Forms, Reports, and Settings. Further down, there are icons for your User Profile (designated by your login name), User Settings, and the Logout button.

Depending on your Role permissions, some sections or features may be unavailable to you.



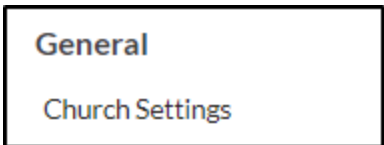
The message center has been moved to the top left of the page, next to your church logo.

Marked with an orange bell icon, notifications will appear when automatic tasks or reports have been generated or there are upcoming software updates. Once all notifications have been dismissed, the bell icon will turn black.

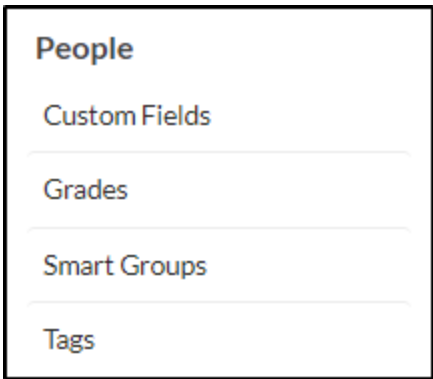


On the Settings view, there is additional navigation on the left hand side of the site, divided into sections.

Under General, users can access settings and information on the site itself, as well as see information related to their Church360° Members subscription.



Under People, users can access the Custom Fields, Grades, Smart Groups, and Tags views.



Under Events, users can access the Calendars view.

Events
Calendars

Under Offerings, users can access Envelopes, Funds, and Pledges.

Offerings
Envelopes
Funds
Pledges

Under Communications, users can access Communication Settings and Opt-ins (for Text Messaging).

Communications
Communication Settings
Opt-ins
Texting

Under Integrations, users can access their Vanco Integration settings, including Synced Givers and Synced Funds, and Paycor Integration, interfacing with the Paycor payroll software.

Integrations
Vanco Integration
Paycor Integration

Under Admin, users can access the Event Log, Logins, and Roles.

Admin
Event Log
Logins
Roles

At the bottom right corner of your site, clicking the small blue circle with a white "i" allows you to search for help articles, chat with a technician, or send CTS an email message directly from your Church360° Members site.

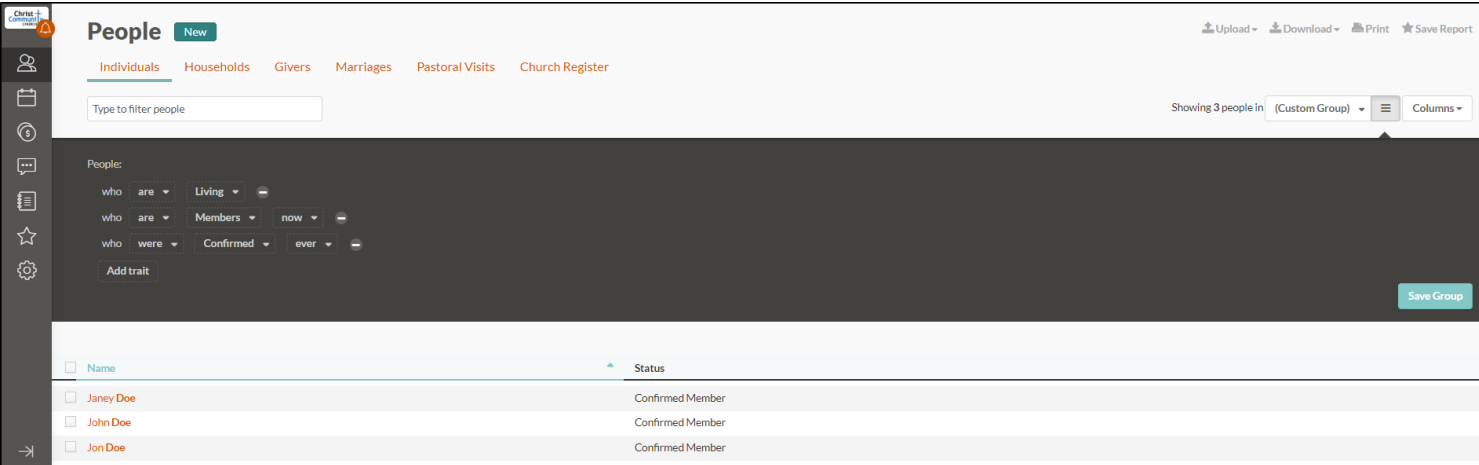


Filtering using Smart Group Traits

When reviewing records or generating lists, you may want to filter your view using certain fields. The Smart Groups feature in Church360° Members can be used to organize your information without actually creating a saved group.

To use Smart Group Traits as a filter,

1. Expand the Smart Groups drawer by clicking the icon with three lines to the right of the Smart Group drop-down list on the right side of the view.
2. In the dark area that shows, click "Add trait" to add parameters to filter your people list and use the drop-down menus to customize.
3. Continue to add traits as you need. Your list will automatically update to reflect these filters.



Filtering using Search

Instead of scrolling through an entire list of records, you can use the search box found under the view heading (where applicable) to filter by a string of characters.

To use the search box,

- 1. Click the white search box where available.
- 2. Type in all or part of the information you are searching for. Church360° Members will search across all currently visible columns in the view to automatically update your list based on your search criteria.
- 3. Click on the individual or household name you were searching for to open and view the record.

Church360°

Members

People

New

Upload

Download

Print

Save Report

Individuals

Households

Givers

Marriages

Pastoral Visits

Church Register

doe

Showing 5 people in

Everyone

Columns

Name	Children	Parents	Spouse
☐ Janey Doe	Jilly Doe Jon Doe		Jim Doe
☐ Jilly Doe		Janey Doe	
☐ Jim Doe	Jon Doe		Janey Doe
☐ John Doe			
☐ Jon Doe		Jim Doe Janey Doe	

Selecting Field Columns

When viewing person and household records, there is a variety of information that can be made available to you without having to enter each and every record.

To the right of the view, there are a couple of drop-down menus, the right one being labeled "Columns". This is where you can determine which information is shown or hidden to keep your visible list tidy and organized as well as reduce the information exported or printed from the current screen.

Each mode of the People view will have different sets of columns so if you don't see a certain field, you may need to change your mode, particularly when looking at custom person or household fields.

To change your visible columns,

1. Click the "Columns" drop-down menu in the People view.
2. Check any boxes for field columns you'd like to include and uncheck to hide them. The All checkbox can be used to select or unselect all available checkboxes. Your view will automatically update according to your choices.

 Upload ▾  Download ▾  Print  Save Report

Showing **322** people in

Everyone ▾



Columns ▾

☐ All

☐ Address

☐ Age

☐ Baptism

☐ Birthday

☐ Children

☐ Confirmation

☐ Confirmation Verse

☐ Death

☐ Email Addresses

☐ Employer / School

☐ Envelope Number

☐ Ethnic Group

☐ Household

☐ Journey Map - Stage

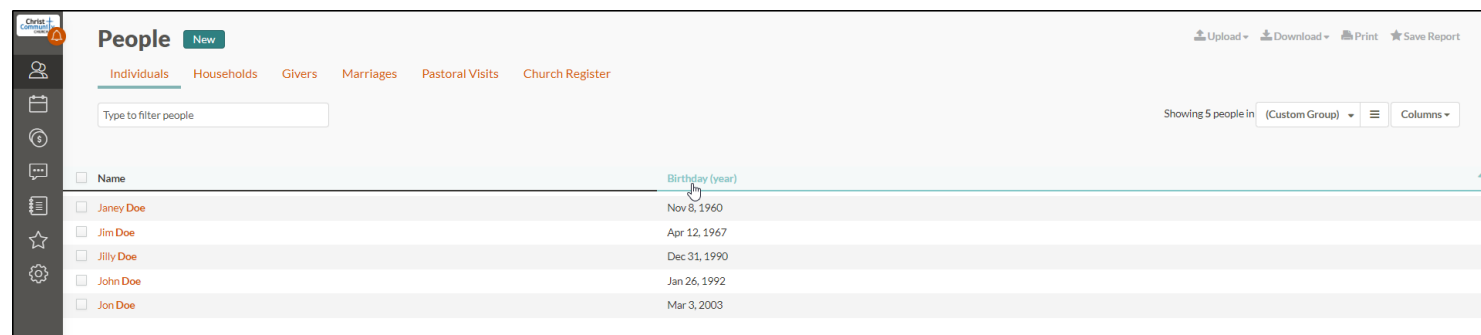
☐ Maiden Name

Sorting Views by Field

Information in most views can easily be sorted by any visible field for easier reading, printing, and organization by clicking on its column header.

You may choose to sort in ascending or descending order. A small upward arrow signifies an ascending sort and the small downward pointing arrow signifies a descending sort. If you wish to sort by another column, click on that column name. You can only sort by one column at a time.

In certain columns, additional text will appear in parentheses to signify which value within the column is being sorted. For example, most date fields can be sorted by year or month, which can be toggled through by clicking the header multiple times.



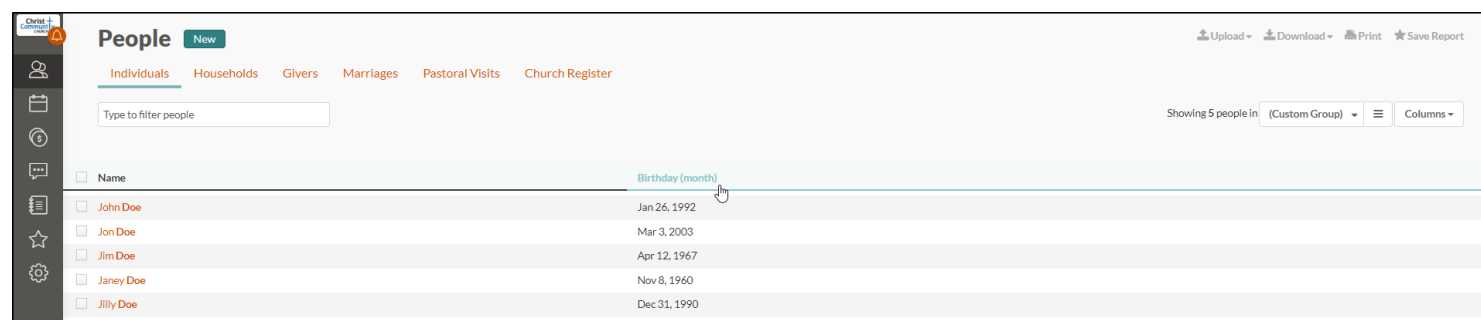
People New Upload Download Print Save Report

[Individuals](#) [Households](#) [Givers](#) [Marriages](#) [Pastoral Visits](#) [Church Register](#)

Type to filter people

Showing 5 people in (Custom Group) Columns

☐ Name	Birthday (year) ▲
☐ Janey Doe	Nov 8, 1960
☐ Jim Doe	Apr 12, 1967
☐ Jilly Doe	Dec 31, 1990
☐ John Doe	Jan 26, 1992
☐ Jon Doe	Mar 3, 2003



People New Upload Download Print Save Report

[Individuals](#) [Households](#) [Givers](#) [Marriages](#) [Pastoral Visits](#) [Church Register](#)

Type to filter people

Showing 5 people in (Custom Group) Columns

☐ Name	Birthday (month) ▲
☐ John Doe	Jan 26, 1992
☐ Jon Doe	Mar 3, 2003
☐ Jim Doe	Apr 12, 1967
☐ Janey Doe	Nov 8, 1960
☐ Jilly Doe	Dec 31, 1990

Denominational Differences in Church360° Members

Church360° serves many churches of several different denominations, each requiring distinct terms in regard to membership status changes.

For that reason, CTS has reached out to various denominations for their input on how our software can best serve their congregation's needs.

As a result, Church360° Members requires specific options for the Received by and Remove by membership fields depending on the denomination set in [Church Settings](#). These settings will also be reflected in the membership gains and losses on the [Annual Report](#).

Warning: It is important to select your correct denomination prior to entering large amounts of data onto your site. Changing your denomination remaps your received by and removed by terms. Before making a change, please reach out to our support team. Changing your denomination multiple times can remap your data into a state that's not easily reversed.

The following is a list of the terms used for each sect.

Another note worth making is that marking a member as deceased will automatically mark them as being removed by death.

Denomination	Received by/Removed by options
LCMS	Received by Baptism Received by Confirmation Received by Profession of Faith Received by Transfer from Other LCMS Received by Transfer from Other Lutheran Reinstate Removed by Excommunication Removed by Joining Non-Lutheran Removed by Moving without Transfer Removed by Release to Other Lutheran Removed by Transfer to Other LCMS Removed from Membership (Other)
WELS	Received by Baptism Received by Confirmation Received by Profession of Faith

	Received by Transfer from sister congregation Released to other Christian churches Removed by Excommunication Removed by Transfer to sister congregations Removed from Membership (Other)
ELCA	Received as Member (Other) Received by Affirmation of Faith Received by Baptism Received by Confirmation Received by Transfer Removed by Transfer Removed from Membership (Other)
United Methodist	Received as Member (Other) Received by Baptism Received by Profession of Faith Received by Transfer from Other Denomination Received from other United Methodist churches Restored by Affirmation of Faith Removed by Charge Conference action Removed by Transfer to Other Denomination Removed by transfer to other United Methodist churches Removed by Withdrawal
Presbyterian	Received as Member (Other) Received by Affirmation of Faith Received by Baptism Received by Confirmation Received by Transfer Received by Transfer from Other Denomination Received by Transfer from Same Denomination Reinstate Removed by Excommunication Removed by Transfer Removed by Transfer to Other Denomination Removed by Transfer to Same Denomination Removed from Membership (Other)
Southern Baptist	Received as Member (Other) Received by Baptism Received by Profession of Faith Received by Transfer

	Received by Transfer from Other Denomination Received by Transfer from Same Denomination Removed by Transfer Removed by Transfer to Other Denomination Removed by Transfer to Same Denomination Removed from Membership (Other)
Catholic	Received as Member (Other) Received by Affirmation of Faith Received by Baptism Received by Confirmation Received by Profession of Faith Received by Transfer Received by Transfer from Other Denomination Received by Transfer from Same Denomination Reinstate Removed by Excommunication Removed by Transfer Removed by Transfer to Other Denomination Removed by Transfer to Same Denomination Removed from Membership (Other)
Non-denominational	Received as Member (Other) Received by Affirmation of Faith Received by Baptism Received by Profession of Faith Received by Transfer Reinstate Removed by Excommunication Removed by Transfer Removed from Membership (Other)

Glossary of terms used in Church360°

Anniversaries: The dates of birthdays, baptisms, confirmations, deaths, and wedding anniversaries can be displayed in the Events view. Anniversary dates for any of these events can be added in an [individual's profile](#).

Asterisk ():* The symbol used to indicate a non-member in the church directory.

Attendance View: The view that allows you to [record attendance](#) for events that are in your Events calendar.

Barcodes: [Generated bars](#) for mailing labels, used to send mail through the USPS.

Calendars: A [collection](#) of different events in the church.

Column Selector: The [tool](#) that allows you to add or subtract [sortable](#) data in the Households and People views.

Contribution Statements: [Documents](#) generated based on offerings. These provide accurate, yearly information on your members' giving history.

Criteria: A [collection](#) of traits that are used to define a Smart Group.

CSV: An exportable file type that stores your members' data for use in a spreadsheet program like Microsoft Excel.

Custom Fields: [Uniquely created fields](#) that can be used to record information that is specific to your church.

Docx: A exportable file type that can be opened in word processing programs like Microsoft Word.

Events View: The [view](#) that displays calendars for the various events scheduled in your church.

Filter: An [option](#) used to narrow down or refine a certain subset of information.

Headings: The bold text at the top of a page or section.

Household: A [group of people](#) who reside together.

Latin Cross: The symbol used in your data fields to indicate a deceased church member.

Listed: This designation can refer to either (1) people who wish to be listed in the [church directory](#) or (2) people who wish to have their phone numbers or email addresses [listed](#) in the directory (this second case can be used as a Smart Group trait).

Membership: The group of people who are listed as [official members](#) of your church. Visitors or guests are not counted as part of your church membership.

Offerings View: The [view](#) that displays financial contributions to your church from individuals or households.

Pastoral Visits: The [view](#) that allows you to see when members of your congregation have been visited by a pastor, staff member, or layperson. Use Pastoral Visits to make sure that people are visited periodically or when needed.

People View: The view that allows you to see individuals and households in your database.

Reports View: A [collection](#) of views that you use, email, or print frequently. Creating reports saves you from defining your view every time you need to email a group of people or view attendance for a specific date range.

Roles: The [mechanism](#) used to allow or deny access to certain features within Church360° Members. Roles prevent certain users from seeing private information or making unnecessary changes to your church information.

Shepherd's Staff: CTS's Windows-based, offline church management [software](#).

Smart Group: A [dynamic group](#) of people that fit a certain set of criteria.

Tags: A [way](#) to label your members, allowing you to easily find people who meet certain criteria.

Traits: Qualities that describe a certain person.

Trends: A [collection](#) of data that compares statistics across time periods.

Understanding differences between Shepherd's Staff and Church360°

If you are moving from our other church management software Shepherd's Staff, you will certainly notice differences in your new software. Though neither software is better or worse than the other, Church360° does have a separate software development crew and uses different approaches to church management. Some of these differences are highlighted in this article.

Fields that import and do not import

CTS has developed an importer for customers to be able to import most of their historical data from their Shepherd's Staff database up to their new Church360° Members site. However, not every field in Shepherd's Staff has a one-to-one corresponding field in Members. For more information on fields that may or may not import, please visit our [article here](#).

It's also important to check your custom fields after import. Some fields like Person Assigned or Elder may be imported as both a person and household field. To save future data entry confusion, it is recommended to choose one custom field to use and delete the other. If you need any assistance with this, please feel free to reach out to CTS.

Approaches on Reports

One of the major differences you'll find between the two software systems will be their reporting interface. Shepherd's Staff offers several canned reports that pulls data from its database and presents it in a templated structure that has limited customization and some exported views. Some people prefer this, but others want more flexibility in how their reports look and give data to its users. Church360° uses this more customized approach by allowing most if not all views to be printed directly from your web browser or exported into Excel that users can then use to modify the data into a format that fits their needs.

It's recommended to review these areas of each when deciding which software works best for you.

Subgroups vs Smart Groups and Tags

Another adjustment when moving from Shepherd's Staff would be how it groups people with similar traits.

Shepherd's Staff uses a concept called subgroups. These groups can be created and applied to views and reports to filter people you are looking at. Subgroups can be dynamic and use criteria based on fields to

include all records that fulfill those requirements. And users can also create static subgroups where the user can manually pick and choose which people they want as a part of this group.

Church360° has similar grouping options called Smart Groups and Tags. Smart Groups uses traits based on fields and relationships to show those who fit those traits. To designate someone as part of a group but not basing that designation on a field, you can add a tag to a person or household record to use as a filter.

Contributors vs Givers

Another concept that you may notice is the differences between contributors (anyone with an individual or joint envelope number) and givers (individuals or married couples that gave an offering). The concepts are very similar with differing requirements.

Shepherd's Staff requires all contributors, past and present, to have an envelope number, whether the person themselves use a physical envelope or not. And envelope numbers can be shared between two people in the same household/address, even if they are not married. As such, contribution statements can have both people's names attached to those offerings.

Church360° does not require giving units to have envelope numbers to contribute and receive statements. And it uses the logic that since a contribution statement affects tax reporting, only those who are married can share offerings. This may lead to the importer to assume that if someone shares an envelope number and posted offerings with someone else, they must be married. Users will want to review their giving units to make sure all marriages are accurate. If there are any discrepancies related to marriages and offerings, please contact CTS support and we can help move those offerings appropriately and help fix any incorrect relationships.

Using Shepherd's Staff and Church360° Members/Ledger concurrently

For various reasons, your church may choose to use both Shepherd's Staff and Church360°Members for church management. If this is the case, you'll want to keep a few things in mind.

The import will convert most of the data available in Shepherd's Staff Membership, Attendance, and Contributions modules. No finance information will be imported into Members through the main import utility on People. However, the Church360° suite does offer a financial software called Church360° Ledger that you can import account data from your Finance module through [another utility](#).

After the initial import of your Shepherd's Staff database, the Shepherd's Staff and Church360° Members software no longer interact. You can reimport your database to your Members site, but existing person records on the site will be skipped and not be updated. Only new records will be imported.

You can then continue to use Shepherd's Staff alongside your Church360° Members subscription but you will need to enter in data into both programs in order to maintain accuracy in reporting.

In the same way, you can use the Shepherd's Staff Finance module and Church360° Ledger simultaneously, if the same information is entered into both programs.

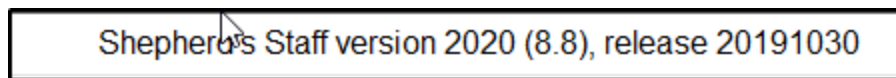
Preparing your Shepherd's Staff Database for Upload

Church360° Members offers a utility to import your Shepherd's Staff database to your site.

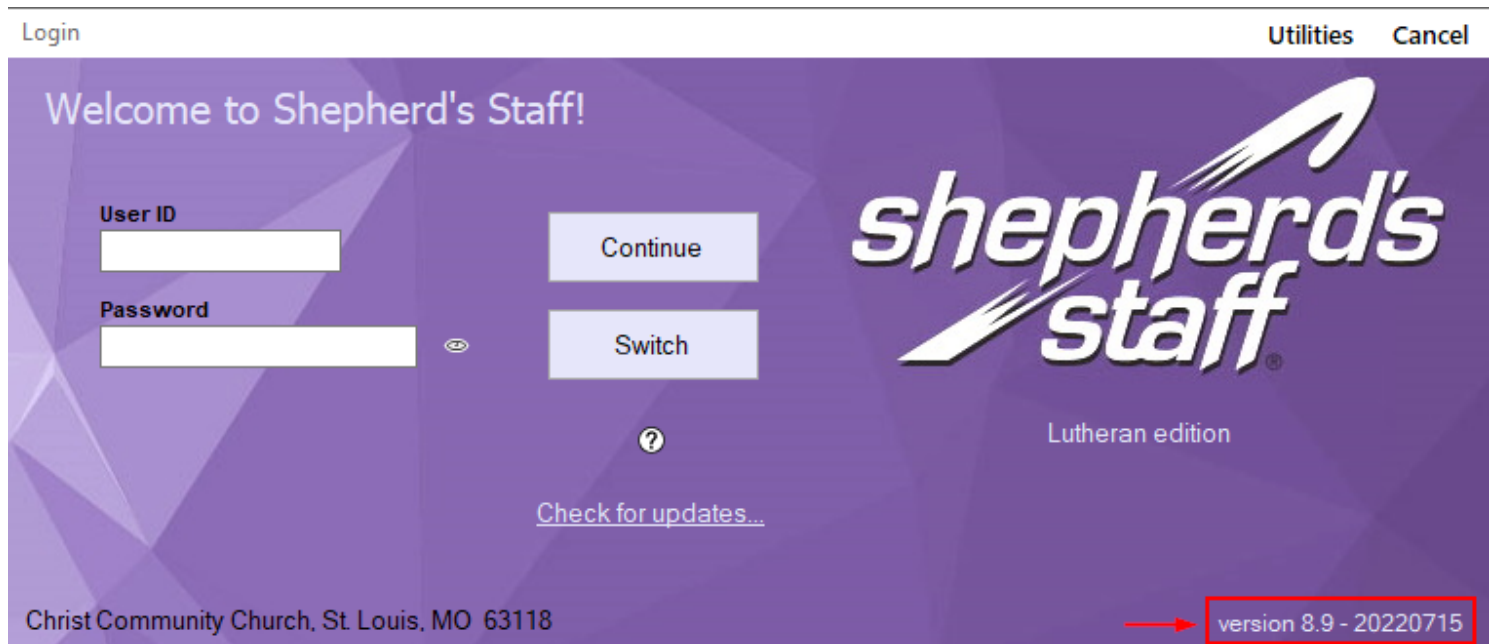
Whether or not you need to run this utility before uploading depends largely on the version of the Shepherd's Staff database in question.

If you do not know your Shepherd's Staff database version, you can find this information on the Main Menu or login screen of your Shepherd's Staff program.

With versions with the stained glass window as the Main screen, the year, version, and release should be located at the very bottom of the screen. The version will be in parenthesis.



With versions with the new purple login screen, you can see the version and release at the bottom right of the window.



Versions 8.1 or older

Customers with older software can call CTS support to update their database for your site. The technician will then log into your computer, take a copy of your database, and update the database for you. They will then send you an import summary after the upload completes.

Version 8.2 to 8.7

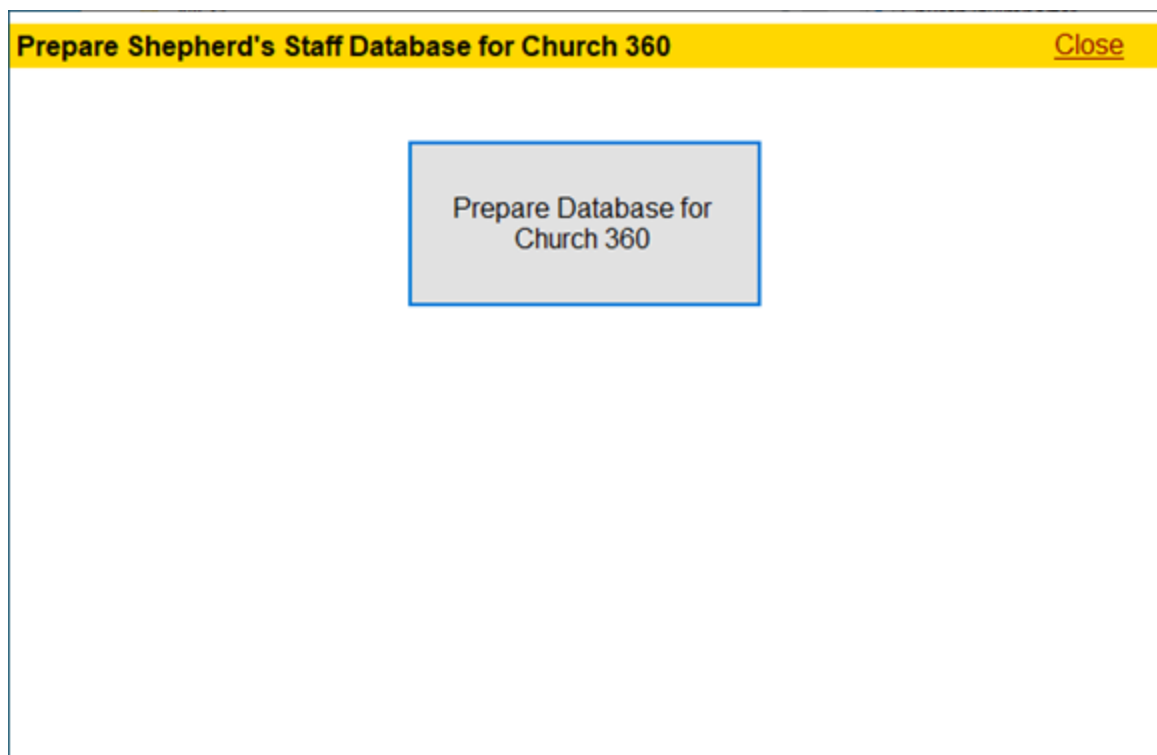
These databases are most compatible with the current importer and do not need to be prepared. Please proceed to [import your data to your site](#).

Version 8.8 or newer

Due to differences in infrastructure between the two software, a small utility must be run to allow data to be converted to your Church360° site.

To prepare your data,

- Download the Church360ImportUtility.zip file at the bottom of this article.
- Right-click the folder and Extract all.
- Double click the application to run.
- Log in using your SYSADMIN credentials. If you do not know these credentials, please call CTS support to log in and run this utility for you.
- Click Prepare Database for Church360.
- After the utility is run, it will tell you the location of the database that was converted.



After the utility has been run, continue to the Upload button on your site to finish the import process.

Importing Data from Shepherd's Staff

If your church previously used Shepherd's Staff, you can use a feature in Church360° Members to import your Shepherd's Staff database. This import process can take up to two hours to complete if another user is using the importer.

Depending on the version of your Shepherd's Staff, you may need to [prepare the database](#) before starting the import process.

This importer converts almost all data in the Shepherd's Staff database and enters it in your Church360° Members account. The list of everything that can and cannot be imported can be found [here](#). The list includes person and household information, offerings, events, and attendance.

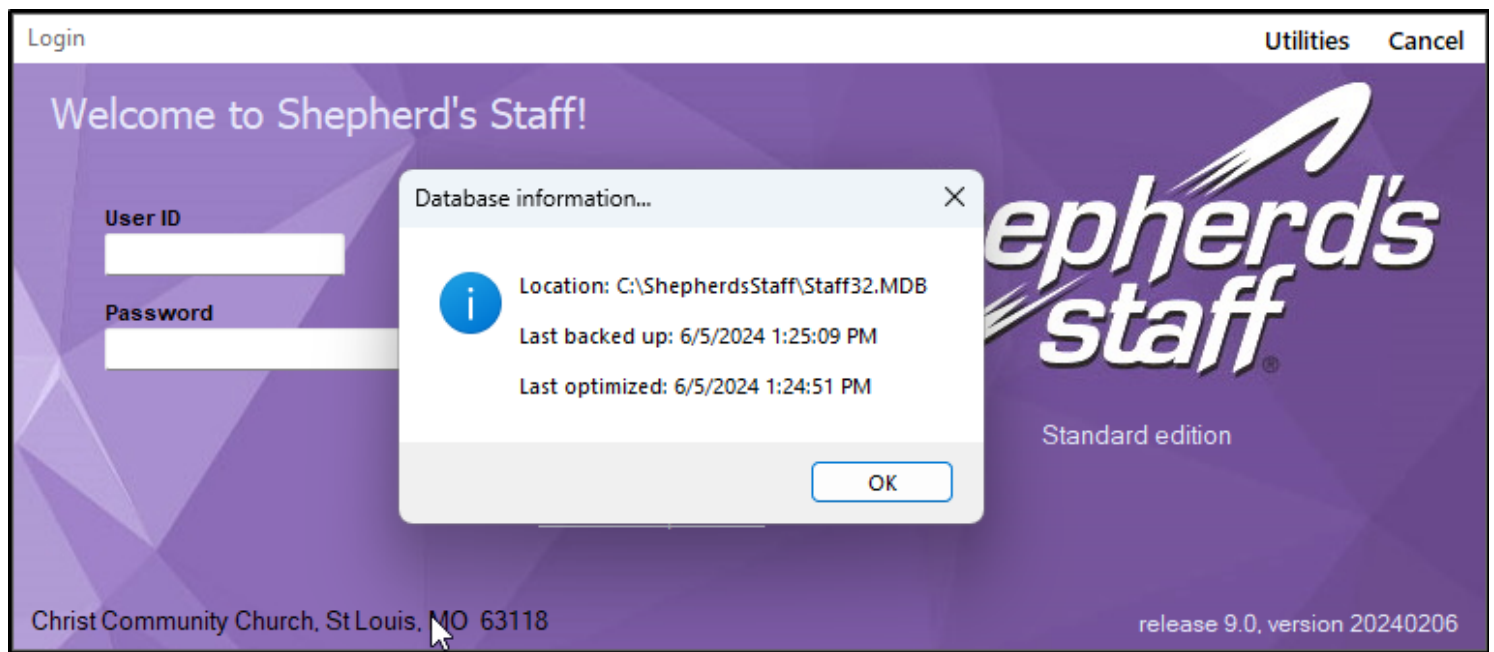
Before you import the Shepherd's Staff database, you will need to know where the database is located on your computer. In most cases, the database will be found at C:\ShepherdsStaff and the database is usually named Staff8.mdb or a similar variation.

If you are unsure of your database name or location, you should be able to find it easily if Shepherd's Staff is still installed on your computer.

To find your database name and location,

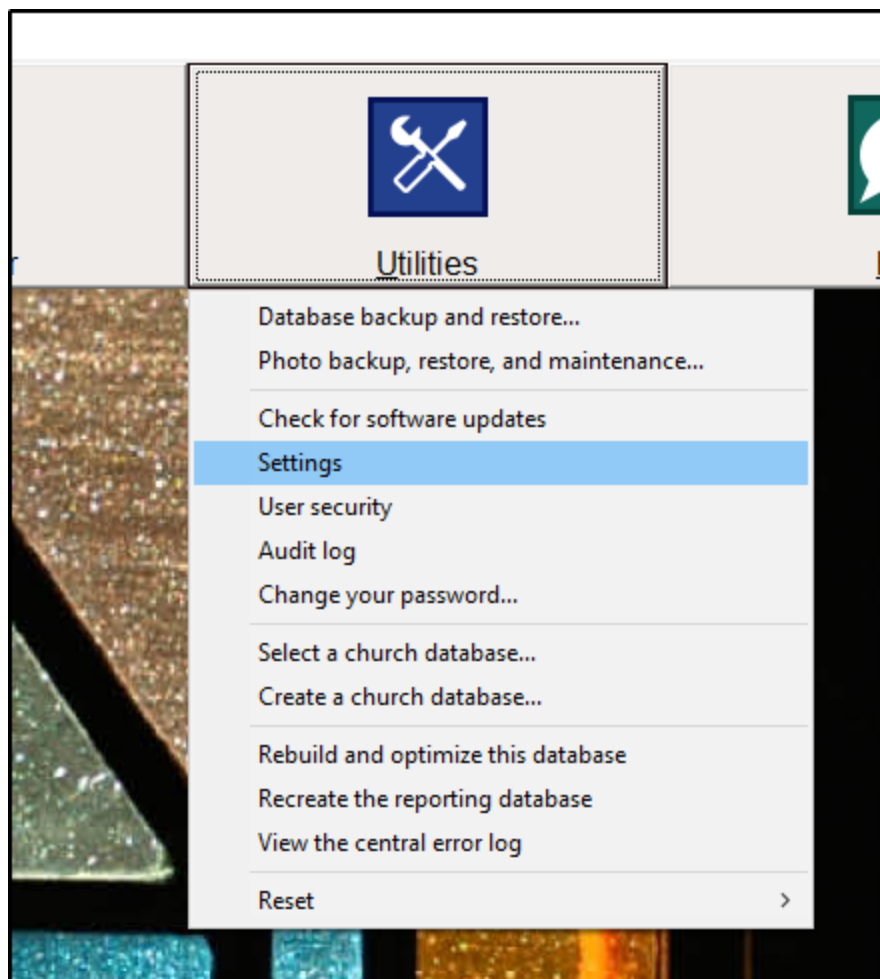
For 8.8 and newer,

- Click on the name of your church at the lower-left corner of your login screen to see where your current database is located.



For 8.7 or older,

- Log into Shepherd's Staff and go to Utilities.
- Under Utilities, go to Settings.



- In the pop-up window, choose the Locations tab, which will show you where the database is located.

The screenshot shows a 'Settings' window with a tabbed interface. The 'Locations' tab is selected. The window has a title bar with a close button. The tabs are 'Church', 'System', 'Web', and 'Membership'. Under the 'Locations' tab, there are sub-tabs: 'Attendance', 'Contributions / Finance', 'Field Names', and 'Locations'. The 'Locations' sub-tab is active. The main area contains several settings:

- INI File:** A text field with the path 'C:\Users\Public\Documents\CPH Shepherds Staff 8\STAFF8.INI' and an information icon.
- Current Database:** A text field with the path 'C:\ShepherdsStaff\Staff32.mdb'.
- Application Path:** A text field with the path 'C:\Program Files (x86)\Concordia Publishing House\Shepherds Staff 8\' and an information icon.
- Work Database:** A text field with the path 'C:\Users\Public\Documents\CPH Shepherds Staff 8\tsswork.mdb' and a file icon.
- Documents:** A text field with the path 'C:\Users\Public\Documents\CPH Shepherds Staff 8\' and an information icon.
- Alternate spreadsheet program:** A text field with a folder icon and a red 'X' icon.

At the bottom of the window are 'OK' and 'Cancel' buttons.

To import a Shepherd's Staff database into Church360° Members,

1. From the People view, click the "Upload" button in the upper right corner, and select "Shepherd's Staff database".
2. Click "Upload".
3. Navigate to the location of the database, select the database file, and click "Open". The database will then be uploaded and imported.

Navigating the Settings view

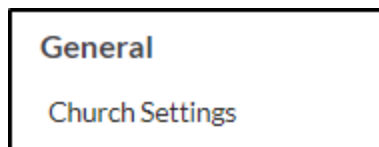
To access specific collections or administrative views relating to each area of Church360°, users will click on the Settings gear on the left to open the Settings view.

This view displays additional navigation on the left hand side of the site, divided into sections relating to the areas of the software the settings affect.

For more information on each individual view that navigates from Settings, please visit the articles relating to them specifically.

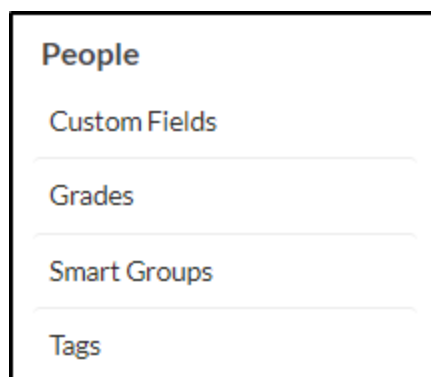
Under General, users can access account settings and information on the site itself, as well as see information related to their Church360° Members subscription.

- Account Settings view



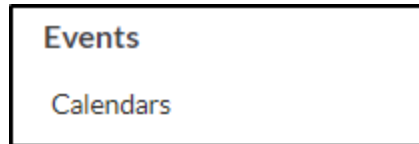
Under People, users can access views relating to fields and filters relating to person and household records.

- Custom Fields view
- Grades view
- Smart Groups view
- Tags view



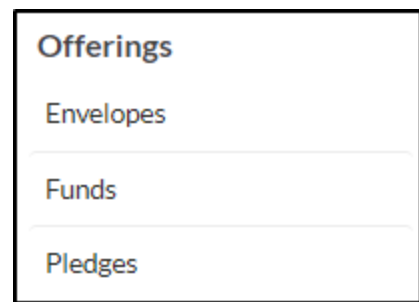
Under Events, users can access views relating to the grouping of events.

- Calendars view



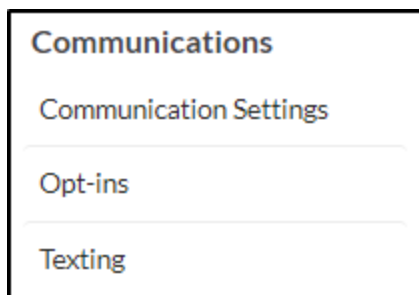
Under Offerings, users can access assignments relating to offerings.

- Envelopes view
- Funds view
- Pledges view



Under Communications, users can access settings and templates related to Communications.

- Communication Settings view
- Opt-ins (for Text Messaging) view
- Texting view



Under Integrations, users can access their third-party integrations for various import tasks.

- Vanco Integration view

Integrations

Vanco Integration

Under Admin, users can access administrative logs and assignments.

- Event Log view
- Logins view
- Roles view

Admin

Event Log

Logins

Roles

Navigating Account Settings

The default Settings view allows you to reference and control different aspects on how your Church360° Members site looks and behaves.

Here, you can edit your church information, primary contact information, grade promotion, calendar settings, and tax information.

Church Information

The first information you see is your general church information. Here, users can add or edit a logo, church name and addresses, time zone and denomination.

The church name, phone number, address, and (if included, church logo) entered here will appear on your contribution statements.

If you do not see your denomination in the drop-down menu, please select the option that most closely resembles it. The denomination selected determines available “Received by” and “Removed by” reasons for members.

It is important to select your correct denomination prior to entering large amounts of data onto your site as changing your denomination remaps your received by and removed by terms. Before making a change, please reach out to our support team for recommendations based on your specific situation. Changing your denomination multiple times can remap your data into a state that's not easily reversed.

For more information on the denominational differences in Church360° Members, please visit [this article](#).

Church Information

Church Name

Christ Community Church



Edit Logo

Church Phone Number

 (201) 555-0123

We may use this phone number to contact you about information pertinent to your account. Please refer to our Privacy Policy or the Information Center for more details.

Church Email Address

office@christbakersville.org

Church Address

Street Number

4235 W Main Street

City

Bakersville

State

MO

Zip Code

65613

Time Zone

Central Time (US & Canada) ▼

Denomination

Lutheran Church Missouri Synod ▼

Select the option that most closely resembles your church's denomination. This selection determines the available "Received by" and "Removed by" reasons and is important for creating your Annual Report.

Primary Contact

Your primary contact will be the best person for CTS to contact about information pertinent to your Church360° account. This information is not shared anywhere on the site.

Primary Contact

Full Name

Kent Williams

Phone Number

 (201) 555-0123

We may use this phone number to contact you about information pertinent to your account. Please refer to our Privacy Policy or the Information Center for more details.

Email Address

revkent@christbakersville.org

Your Plan Information

This section houses data related to your current subscription plan with Church360° Members.

You can review your plan level and number of active member households in your database to see if you may need to adjust your plan if your household total approaches your plan limit (if there is one).

Only households with at least one living, non-removed member will be added to this count. Under Active Member Households, click the number listed for a full list of your member households.

If you are have an active subscription with CTS, you'll also be able to reference your plan expiration date. Typically, invoices for renewal are mailed a month or two before your expiration date.

Your customer ID number is also included should you ever need to contact support or billing department in regards to Church360° Members.

Your Plan Information

Plan Levels (Member Household Limit)

0-30

31-150
Your Plan

151-275

276-400

401-650

651+

Active Member Households

126 out of 150 member households used

Denotes households with at least one living member.

Plan Expiration Date

Your software subscription will automatically renew Feb 28, 2025. You will receive your invoice in the mail.

Customer ID Number

Grades

You have the option to set up a date for all grades to automatically promote. By checking the box in this section, you will have the opportunity to choose a date from the drop-down menu.

It is important to note that setting the date to the current day will not immediately promote your students. Instead, it will schedule the next promotion for the following year. In this case, it is recommended to set the automation to start the promotion the following day.

For more information on setting an automatic promotion date, please visit [this article](#).

Grades

☒ Automatically promote grade levels

By clicking this box you certify that you would like to automatically promote all children up one grade level on the date specified below.

Automatic promotion date

August

18

Last updated August 18, 2023

Next update August 18, 2024

Calendar

The day you start your week on determines the day of your first scheduled sermon for the week and will be used to calculate your average attendance numbers and trends.

Calendar

Start week on

Sunday

Select the day you'd like your reporting week to begin, which is used when calculating trends, averages, and pledge totals.

Tax Information

For certain tax-related documents, you may want to add a Federal Tax ID. Enter in the number in the textbox located in this section to include this on your statements.

Tax Information

Federal Tax ID

Saving your Changes

When you edit any of your settings in Account Settings, a black bar will appear at the bottom of your screen, tracking your changes.

After you finish and verify your changes, you must click the “Save Now” button to save them.

You have made 1 unsaved change

Save Now

Do Not Save

Navigating your User Profile and Settings

At the bottom of the navigation bar to the left, there are three icons related to User Settings.

User Profile

Clicking on the user profile picture or name will navigate to the person record attached to the user currently logged in.

Depending on what permissions a user has, they can edit their name, address, and contact information for them and their household.

User Settings

Clicking the button below the user profile picture will navigate to the User Settings view.

Under the User Setting section, users can update their login email, username, default view, and whether they would like to receive emails for upcoming, scheduled pastoral visit dates.

Under the Account Security section, users can add or edit their password and passkey options for their account or sign out of Church360° Members on all devices, including the current device.

Note: Anytime changes made in User Settings will require users to enter in their current password in order to save. If a user does not know their password, it is recommended they log out of the site and use the "Trouble signing in?" link on the login screen.

User Settings

User Settings

Login Email

Username

Username is optional

Default View

People ▾

Receive Pastoral Visit Notifications

☐

Opt in to receive email notifications and reminders for scheduled pastoral visits.

Account Security

Password Password ✎

+ Add passkey

Sign out on all devices

This option signs you out from all devices you've logged in through, including this one.

Logout

If a user finishes their tasks and no longer needs to use or access the site for the time being, it's recommended they log out to avoid others accessing the site with their login. This is especially true for shared devices.

Changing Your Login Email or Username

Even after your login account has been created, you can update your login email and username from the User Settings view.

To change your login credentials,

1. Go down to your User Settings in the lower left corner of your site (right above the log out button).



2. Edit your login credentials as needed. You can also edit your default view and whether you'd like email notifications for scheduled pastoral visits.

General Settings

Login Email

Username

Username is optional

Default View

People ▼

Receive Pastoral Visit Notifications
☒

Opt in to receive email notifications and reminders for scheduled pastoral visits.

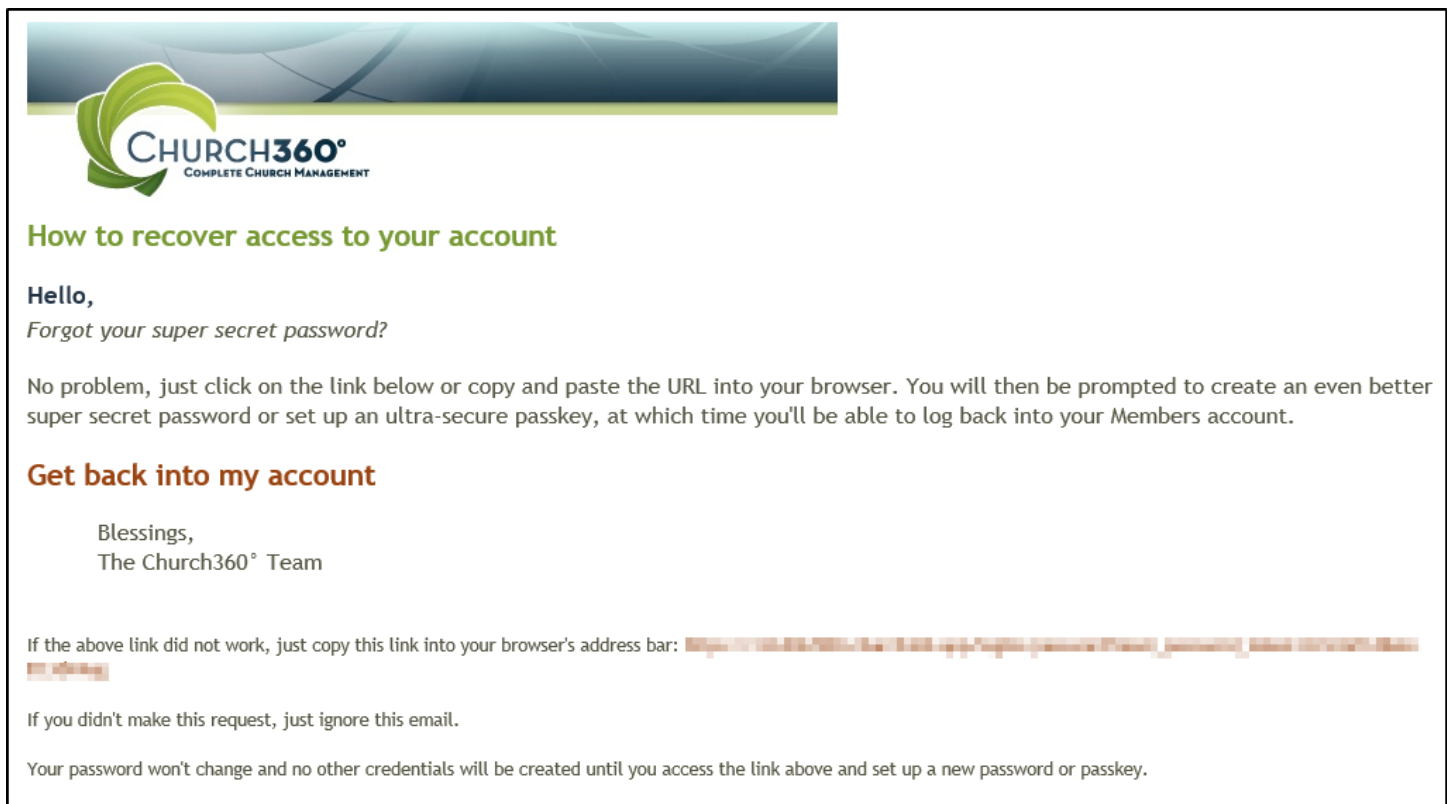
You can also edit your password and passkey options in this view as well. For more information on passwords and passkeys, please visit [this article](#).

Resetting your Password or Passkey

If, for any reason, you need to add or reset a password or passkey to your Church360° Members site, you have a few approaches available to you.

To change your password or passkey from the login screen,

1. Click on the the "Trouble signing in?" link on the Login screen and enter your email address into the field provided.
2. Go to your email inbox and open the email to recover access to your account.
3. In the message, click "Get back into my account".



4. Under "How would you like to login?", choose whether you'd like to create a password or a passkey.
5. Depending on your choice, you'll enter and confirm your password or create a passkey on a device of your choice.
6. Once your chosen authentication is chosen, click the "Continue" button.

To add or update a password or passkey option while logged in,

1. Go up to the profile icon in the upper right corner of your site and go to User Settings.



2. Under the Account Security section of User Settings, edit your authentication credentials as needed.

- To update a password, click the pencil icon to the right of Password.
- To edit the label for a passkey, click the pencil icon to the right of the passkey's name.
- To add an additional passkey, click "Add passkey" and go through the prompts to set up a new passkey.
- If you have multiple authentication options, you can delete any options by clicking the trashcan icon to the right.
- To sign out of all devices, click the "Sign out of all devices" button and log into your site again.

Managing Passkeys

You can manage your password and passkey options from your User Settings area in Church360° Members.

If devices are no longer used or stolen, you can remove those passkeys from your User Settings to protect your security.

To add a passkey,

1. Click the dial icon on the lower left corner of the navigation bar, directly above the Log out button at the bottom.
2. Under Account Security, click the "Add passkey" button
3. On the pop-up window that appears, click the "Create" button and follow the prompts for your chosen device.
4. Add a label for your passkey and click "Save" to confirm.

To edit a passkey name,

1. Click the dial icon on the lower left corner of the navigation bar, directly above the Log out button at the bottom.
2. Under Account Security, click the pencil icon to the right of the passkey you want to rename.
3. Enter in the new label for your passkey and click "Update label" to confirm.

To delete a passkey,

1. Click the dial icon on the lower left corner of the navigation bar, directly above the Log out button at the bottom.
2. Under Account Security, click the trash can icon to the right of the passkey you want to delete.
3. Enter in your password or use another passkey to authenticate your choice and continue with the removal.

User Settings

General Settings

Account Security

General Settings

Login Email

rodkyles@gmail.com

Username

rod

Username is optional

Default View

People

Receive Pastoral Visit Notifications

☐

Opt in to receive email notifications and reminders for scheduled pastoral visits.

Account Security

Passkey

1Password 2



Passkey

iPhone



+ Add passkey

+ Add password