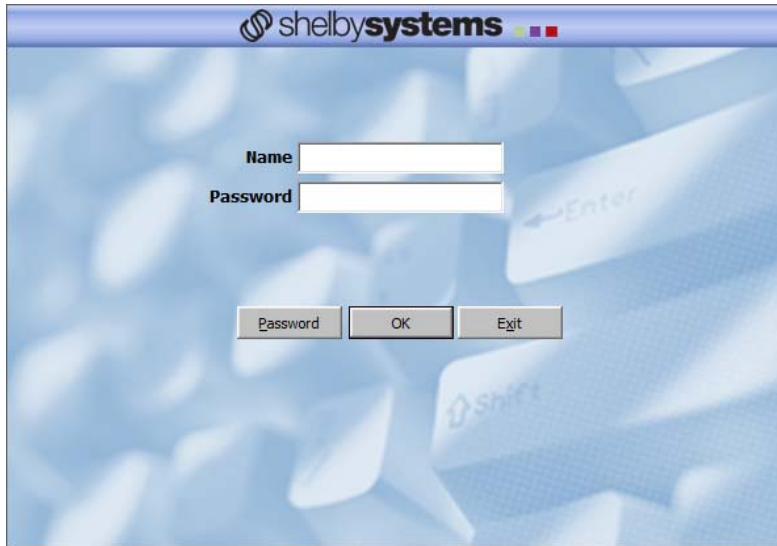


Herald in Every Home Program Instructions

The subscription information for the participants of the *Herald* in Every Home Program (HIEH) will be maintained in Shelby. It is a profile on the individual's record, within the congregation that is paying for the subscription.

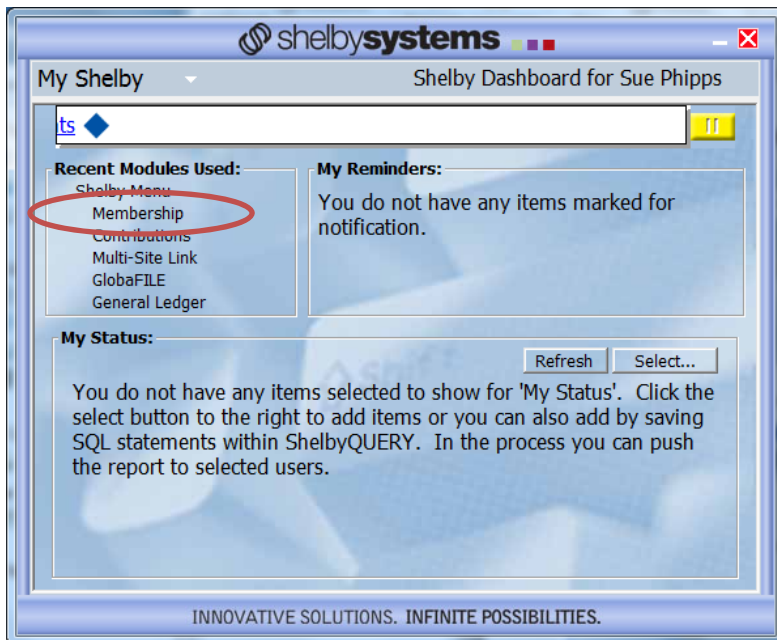
Basic Updating Instruction for Shelby Users

- Log into Shelby and click **OK**



The image shows a login window for Shelby Systems. The window title is "shelby systems". It features a background of a computer keyboard. The login form includes two input fields: "Name" and "Password". Below the fields are three buttons: "Password", "OK", and "Exit".

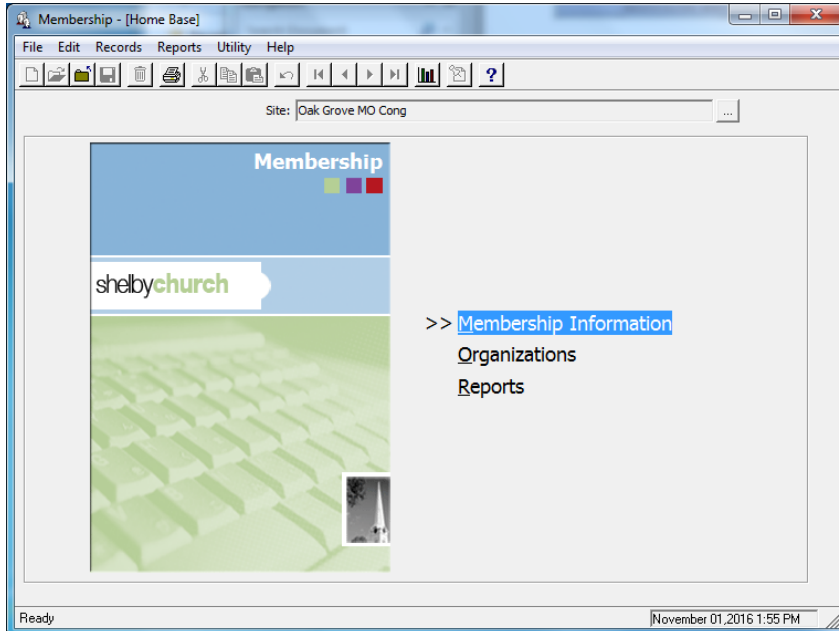
- Click on **Membership**



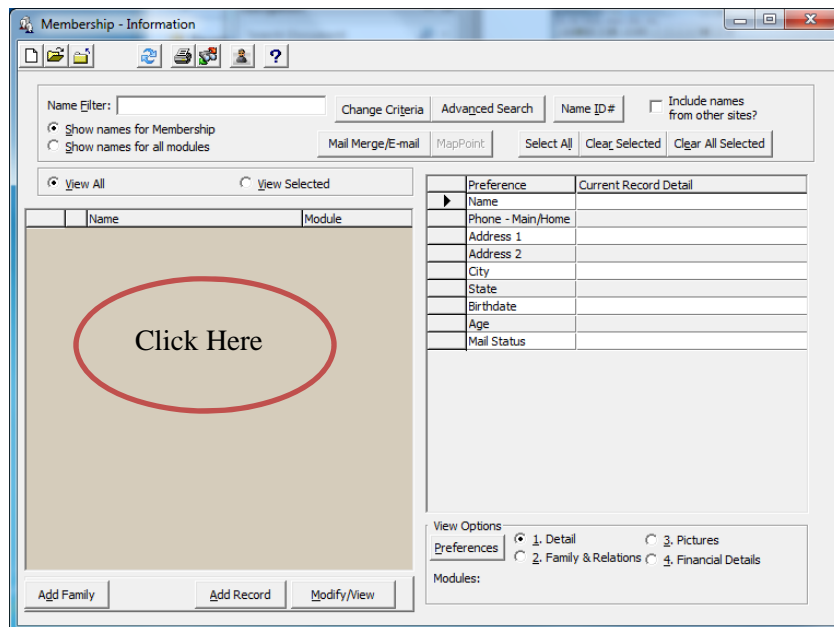
The image shows the Shelby Dashboard for Sue Phipps. The window title is "shelby systems". The dashboard includes a search bar with "ts" entered. Below the search bar are three sections: "Recent Modules Used:", "My Reminders:", and "My Status:". The "Recent Modules Used:" section lists "Shelby Menu", "Membership", "Contributions", "Multi-Site Link", "GlobeFILE", and "General Ledger". The "Membership" item is circled in red. The "My Reminders:" section states "You do not have any items marked for notification." The "My Status:" section includes a "Refresh" button and a "Select..." button. Below the "My Status:" section is a message: "You do not have any items selected to show for 'My Status'. Click the select button to the right to add items or you can also add by saving SQL statements within ShelbyQUERY. In the process you can push the report to selected users." The footer of the dashboard reads "INNOVATIVE SOLUTIONS. INFINITE POSSIBILITIES."

Herald in Every Home Program Instructions

- Click on the **Membership Information** button



- Click in the grey box to bring everyone up that is in your congregation.



Herald in Every Home Program Instructions

- Choose the person you wish to apply the *Herald in Every Home* (HIEH) profile, double click on the highlighted name to open the record.

The screenshot shows the 'Membership - Information' window. On the left, there is a list of members with columns for Name and Module. 'Doe, Jane (#522915)' is highlighted. On the right, the 'Current Record Detail' for Jane Doe is displayed, including fields for Name, Phone - Main/Home, Address 1, Address 2, City, State, Birthdate, and Age. Below the list, there are buttons for 'Add Family', 'Add Record', and 'Modify/View'. At the bottom, there are 'View Options' for Detail, Preferences, Family & Relations, and Financial Details, and a note about Modules: GB, MB, NU, SE.

- Click on "Profile".

The screenshot shows the 'Membership - Information' window in profile view for Jane Doe. The 'Navigator' on the left has 'Profiles' highlighted with a red circle. The main area contains various fields and buttons for managing the member's profile, including 'Module' (Membership), 'Record Status' (Active), 'Relationship' (Active), 'How Received' (Baptism), 'Date Received' (11/1/1996), 'Priesthood Office', 'Envelope', 'Assign', 'Contributions', 'Pledge/Give With Spouse?', 'Include on Envelope Diskette?', 'Print Statements?' (checked), 'Statement Frequency', 'Source', 'Assigned To', and 'Member Of'. A 'Memo' field is at the bottom. The status bar at the bottom indicates 'Setup: Sue Phipps 11/1/2016 2:09:09 PM'.

Herald in Every Home Program Instructions

- To Add a New Profile click on the **Add New** button at lower left corner

The screenshot shows the 'Membership - Information' window. At the top, there are navigation buttons and a search bar. Below that, there are fields for 'Title', 'First/Middle Name(s)', 'Last Name', and 'Suffix'. The 'Individual' radio button is selected, and the 'NameCounter' is 522915. On the left, there is a 'Navigator' pane with a tree view containing categories like 'MEMBERSHIP', 'GENERAL INFORMATION', and 'Profiles'. The 'Profiles' category is selected. In the main area, there is a table with columns 'Profile', 'Start', 'End', 'Comment', and 'Secure'. At the bottom right, there are three buttons: 'Add New', 'Update', and 'Delete'. The 'Add New' button is circled in red.

- Type HIEH in the Profile field and tab
- Click the **OK** button for the addition

The screenshot shows the 'Profile Information' dialog box for 'Jane Doe'. It has a 'Profile' field with 'HIEH' entered and a dropdown arrow. To the right of this field is a text box containing 'Herald in Every Home'. Below the 'Profile' field is a 'Beginning' field with a dropdown arrow. At the bottom left, there is a 'Secure?' dropdown menu with 'Unsecured' selected. At the bottom right, there are three buttons: 'Apply', 'OK', and 'Cancel'.

Herald in Every Home Program Instructions

- As you see the *Herald in Every Home* (HIEH) profile has been added to this person's record.

The screenshot shows a software window titled "Membership - Information". At the top, there are navigation buttons (back, forward, search) and a search bar. Below the search bar, there are radio buttons for "Individual" (selected) and "Organization". The "Individual" section has fields for "Title", "First/Middle Name(s)" (containing "Jane"), "Last Name" (containing "Doe"), and "Suffix". A "NameCounter" field shows "522915".

On the left side, there is a "Navigator" pane with a tree view of categories. The "Profiles" category is selected and highlighted in blue. Other categories include "MEMBERSHIP", "Individual Information", "Organizations", "Other Dates", "Life Events", "GENERAL INFORMATION", "Addresses", "Phones", "Demographics", "E-mail History", "Greetings", "Associated Files", "Primary Family", "Other Relationships", "Pictures", and "Miscellaneous".

The main area of the window contains a table with the following columns: "Profile", "Start", "End", "Comment", and "Secure". One row is visible, with the "Profile" column containing "HIEH - Herald in Every Ho" and the "Secure" column containing "Unsecure".

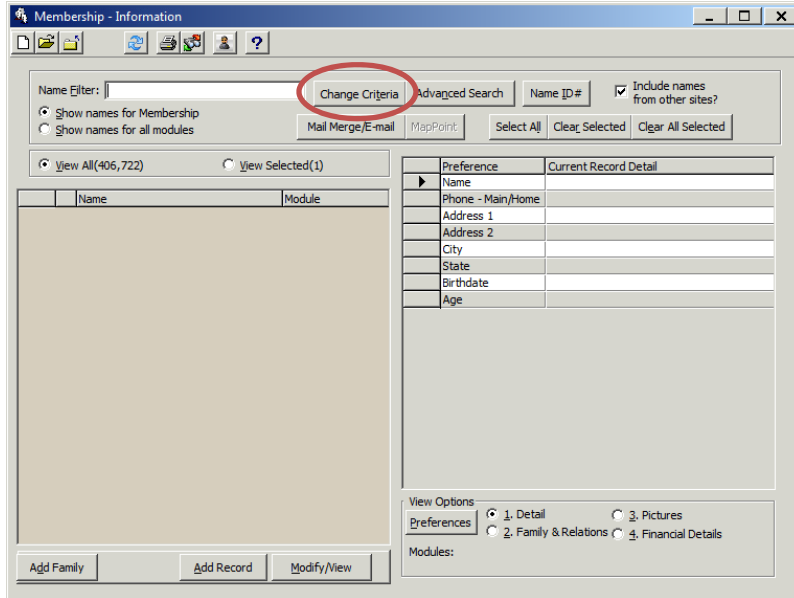
At the bottom right of the window, there are three buttons: "Add New", "Update", and "Delete".

- To take some one off the HIEH list, remove the profile from the person's record by clicking the **Delete** button when the profile is highlighted.

Herald in Every Home Program Instructions

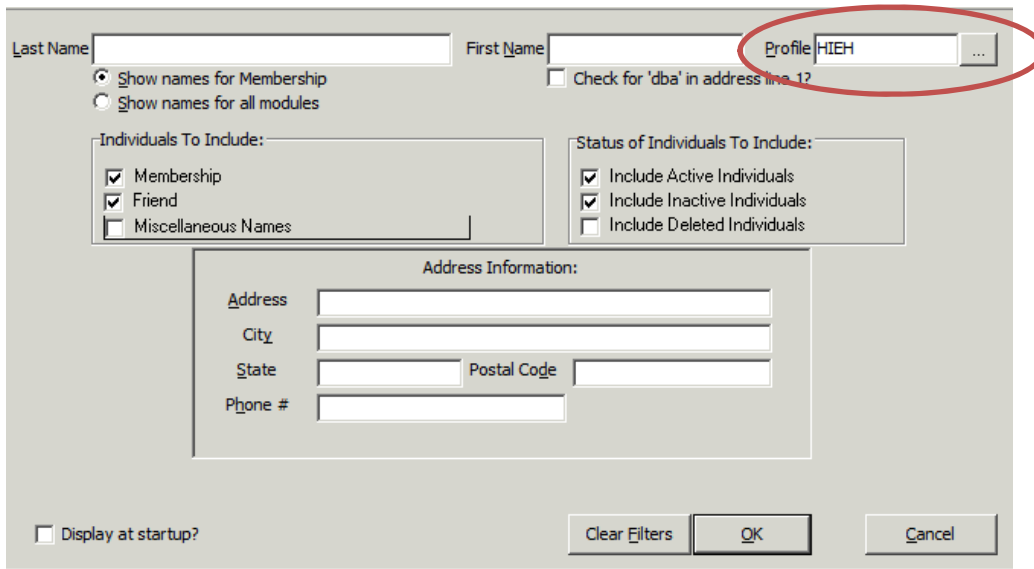
List of HIEH Participants

- To see a list of the people in your congregation who are participating in the *Herald in Every Home* on your screen, go to the Membership-Information screen and click on the “Change Criteria” button.



The screenshot shows the 'Membership - Information' window. At the top, there is a 'Name Filter' field and a 'Change Criteria' button circled in red. Other buttons include 'Advanced Search', 'Name ID#', 'Include names from other sites?', 'Show names for Membership', 'Show names for all modules', 'Mail Merge/E-mail', 'MapPoint', 'Select All', 'Clear Selected', and 'Clear All Selected'. Below these are 'View All(406,722)' and 'View Selected(1)' options. The main area is a table with columns for 'Name' and 'Module'. To the right is a 'Current Record Detail' section with fields for Name, Phone - Main/home, Address 1, Address 2, City, State, Birthdate, and Age. At the bottom, there are 'View Options' (1. Detail, 2. Family & Relations, 3. Pictures, 4. Financial Details) and 'Modules'.

- In the Profile field enter HIEH and click OK.



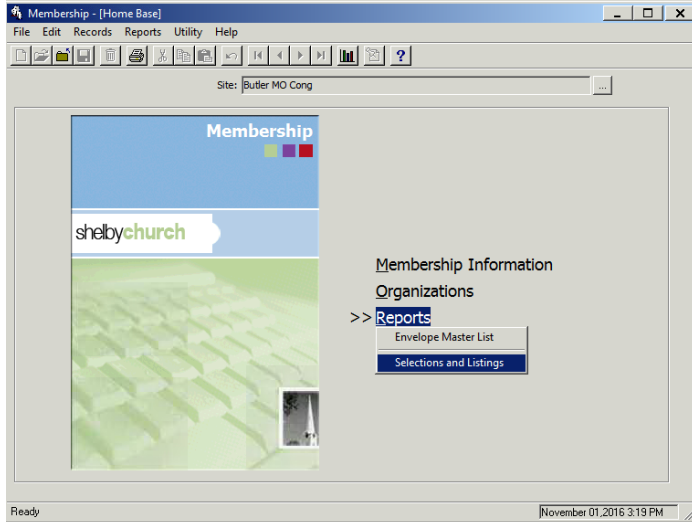
The screenshot shows the 'Profile' field in the 'Membership - Information' window. The 'Profile' field contains the text 'HIEH' and is circled in red. Other fields include 'Last Name', 'First Name', and 'Check for 'dba' in address line 1?'. Below these are 'Individuals To Include' (Membership, Friend, Miscellaneous Names) and 'Status of Individuals To Include' (Include Active Individuals, Include Inactive Individuals, Include Deleted Individuals). The 'Address Information' section has fields for Address, City, State, Postal Code, and Phone #. At the bottom, there are 'Display at startup?', 'Clear Filters', 'OK', and 'Cancel' buttons.

- You will receive a list of the people in your congregation included in the HIEH program.

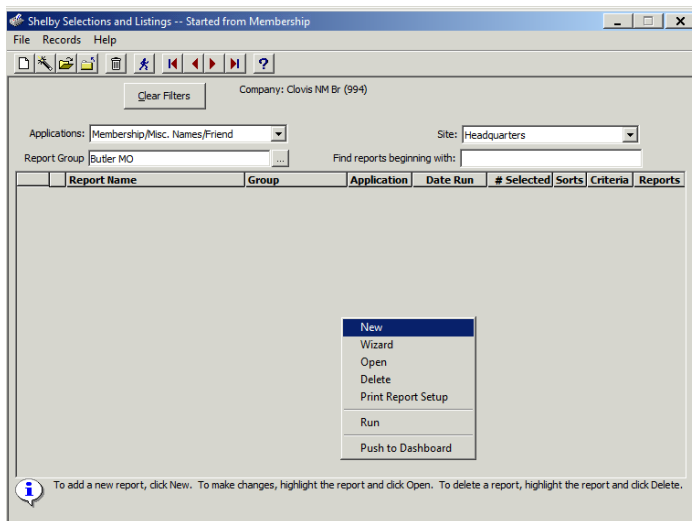
Printed Report for *Herald in Every Home* Lists

- Click on Reports. Choose Selections and Listings.

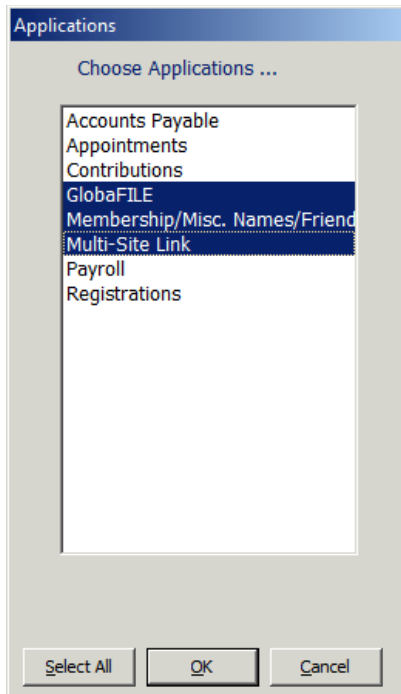
Herald in Every Home Program Instructions



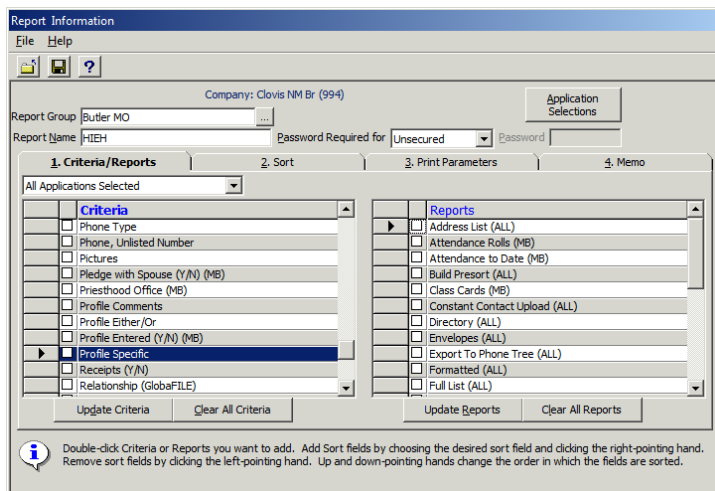
- Choose the Report Group you would like to save you report to.
- Right Click in the gray portion of the screen and choose New.



Herald in Every Home Program Instructions



- Make sure the three modules are highlighted and click OK.



- In the file Report Name, type in your report name HIEH.
- In **Tab 1 Criteria/Reports**, go to the criteria, Profile Specific; double click in the check box.

Herald in Every Home Program Instructions

Profile Specific

HIEH

Omit?

HIEH Herald in Every Home

OK Cancel Delete

- Type HIEH in the first field. And click OK.

Report Information

File Help

Company: Clovis NM Br (994)

Report Group Butler MO

Report Name HIEH Password Required for Unsecured Password

Application Selections

1. Criteria/Reports 2. Sort 3. Print Parameters 4. Memo

All Applications Selected

Criteria

Profile Specific

Additional Comments Memo

Address (Specific)

Address (Type)

Address, Carrier Route

Address, City

Address, Country

Address, Date Updated Address

Address, E-mail Address

Address, Last Updated Date

Address, Location

Reports

Formatted (ALL)

Full List (ALL)

Group E-mail - Default Client (ALL)

Group E-mail - SMTP (ALL)

Individual Information (ALL)

Labels (ALL)

Name List (ALL)

One Line Report (MB)

OutReach (MB)

Phone List (ALL)

Print ID Card

Update Criteria Clear All Criteria Update Reports Clear All Reports

Double-click Criteria or Reports you want to add. Add Sort fields by choosing the desired sort field and clicking the right-pointing hand. Remove sort fields by clicking the left-pointing hand. Up and down-pointing hands change the order in which the fields are sorted.

- In the Reports section, to produce a names list, double click in the check box of Name List (ALL) and name the report *Herald* when the next box comes up and click OK.

Herald in Every Home Program Instructions

Name List (ALL)

HIEH

Herald List

OK Cancel Delete

- To add another report such as Address List (ALL), repeat the process.
- Be sure to include the information to print. Click OK.

Address List (ALL)

HIEH

Herald List

Information to print:

Main/Home Address

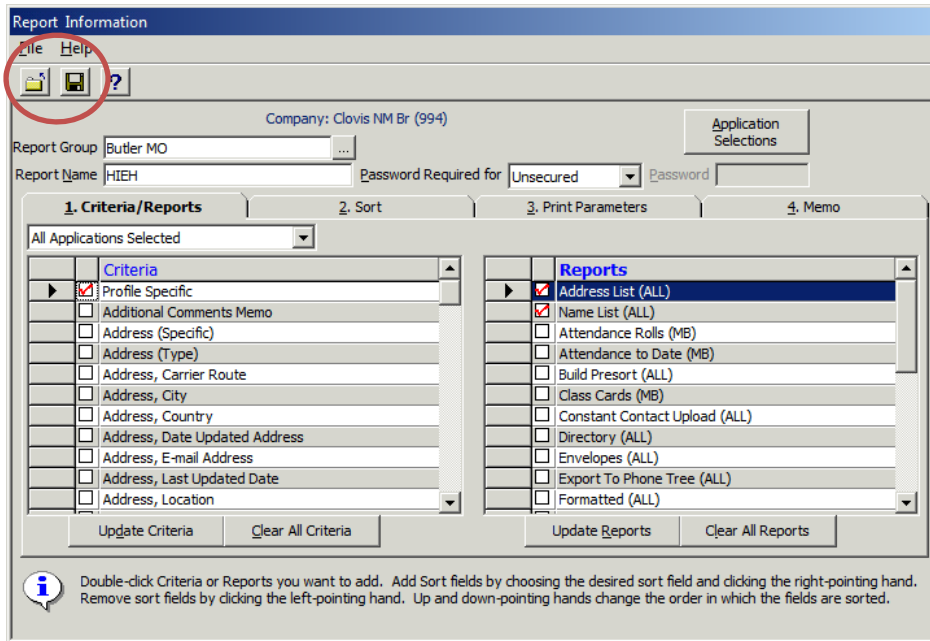
Main/Home

Print Unlisted Phone Numbers

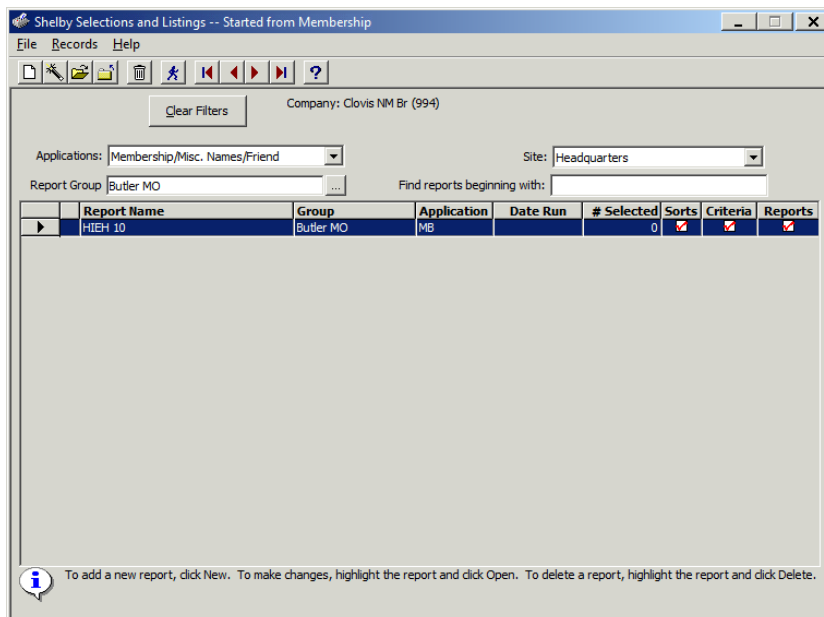
OK Cancel Delete

- Your Criteria/Report screen should look like the example below.

Herald in Every Home Program Instructions

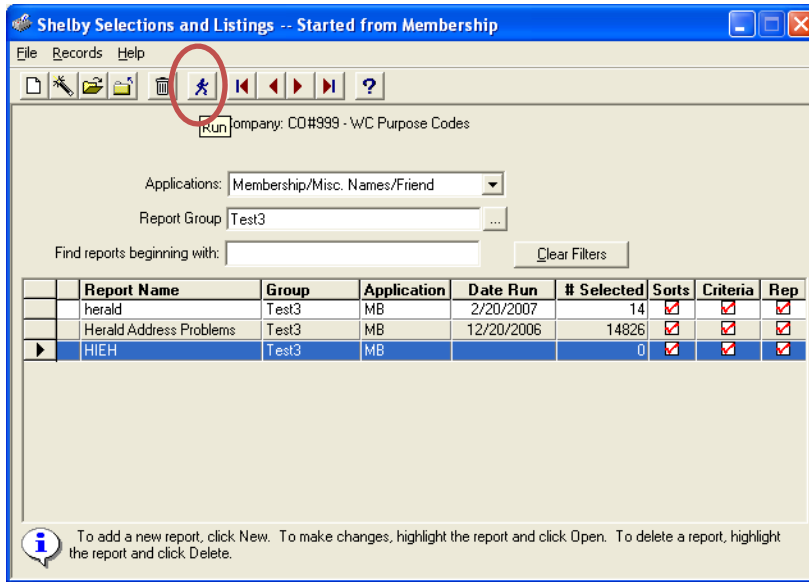


- Click on the **Save** button (the button that looks like a floppy.)
- Click on the **Close** button (the button that look like a file folder with an arrow.)



- To print the reports, highlight the report in the list named HIEH, click on the Run button (the button that looks like a running man.)

Herald in Every Home Program Instructions



- Follow the screen instructions to print your reports.

Herald in Every Home Program Instructions

Updating your *Herald* Subscription List

There is a deadline each month for addition, deletions, and changes to be made to the congregational *Herald* list. That deadline is **12:00 midnight central time on the 13th of every month.** Any addition, deletion or change made to your list prior to that time will be included in the label list for the current mailing.

If your congregation does not have access to Shelby, arrangements can be made to send a list of *Herald* in Every Home participants to the appropriate person in your congregations for review. Herald Customer Service at 1-800-767-8181 or sales@heraldhouse.org to have a list sent. This list would be kept until additions, deletions or changes need to be made. You will make the additions, deletions or changes on that sheet and send to the following address for the changes to be made.

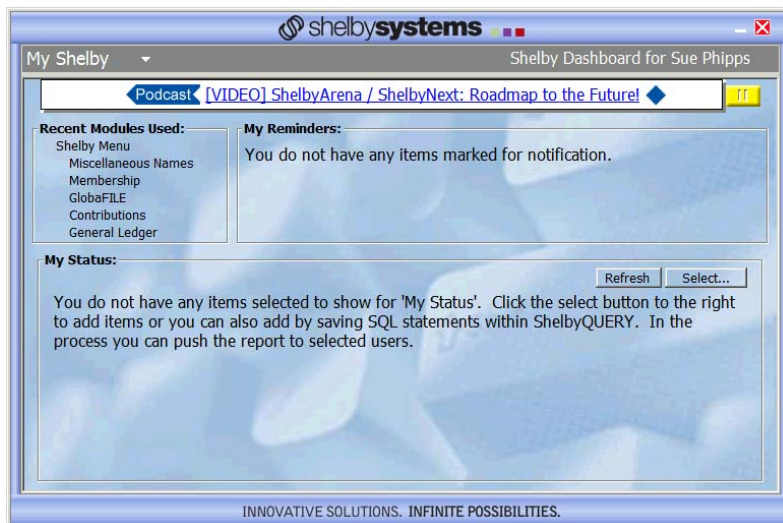
Herald House
1001 W Walnut
Independence, MO 64050-3562

After the changes are made, then a new list will be sent to confirm the changes and that list will be held until changes need to be made again.

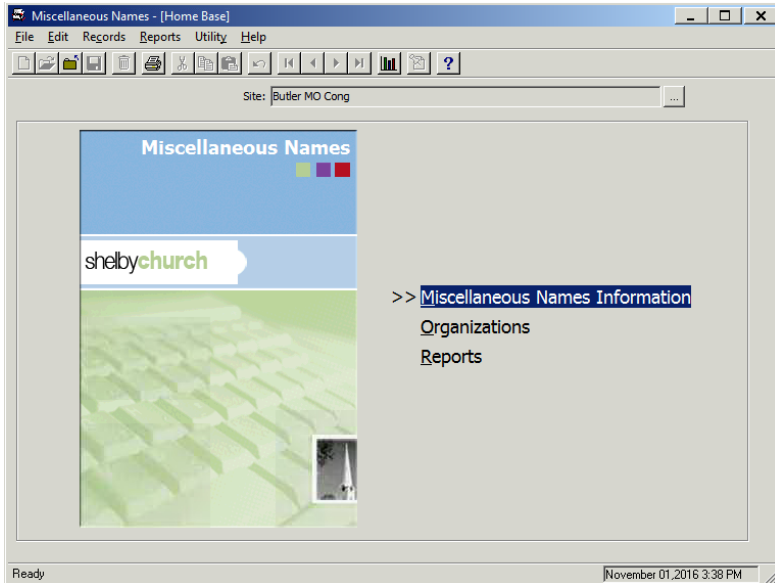
Adding *Herald* in Every Home participant to your congregational HIEH list when they do not attend your congregation:

In many cases, a congregation will pay for someone to get the *Herald* that is not in their congregation. If you need to include someone from another congregation to your list, please add them as a **Miscellaneous Name** to your congregation, and add the HIEH profile to that record so they will show up in your congregational list.

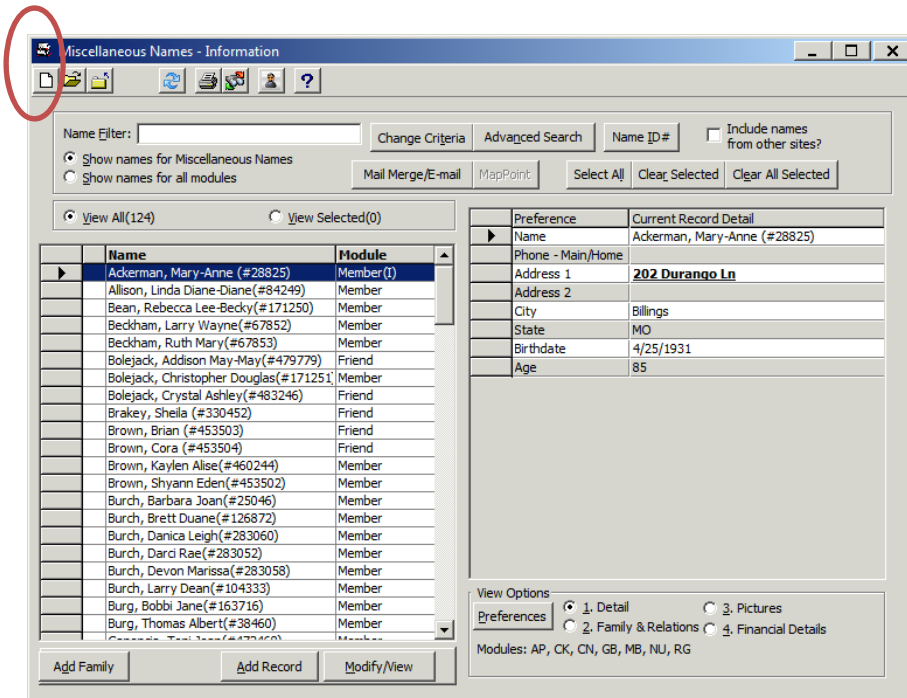
The following screen shots walk you through adding a **Miscellaneous Name**:



Herald in Every Home Program Instructions

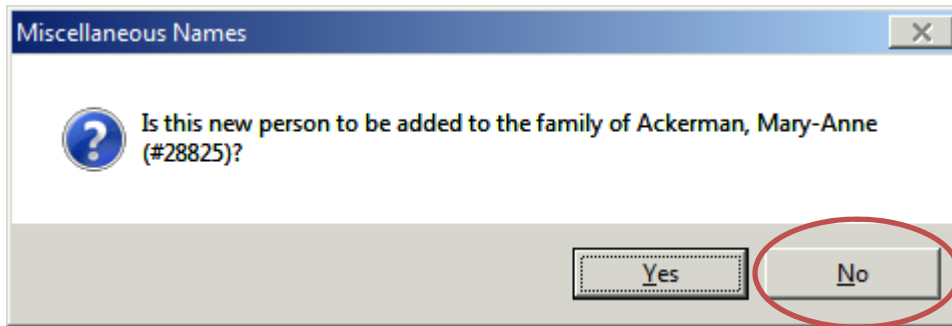


- Choose **Misc. Name Information**
- Click on the New icon

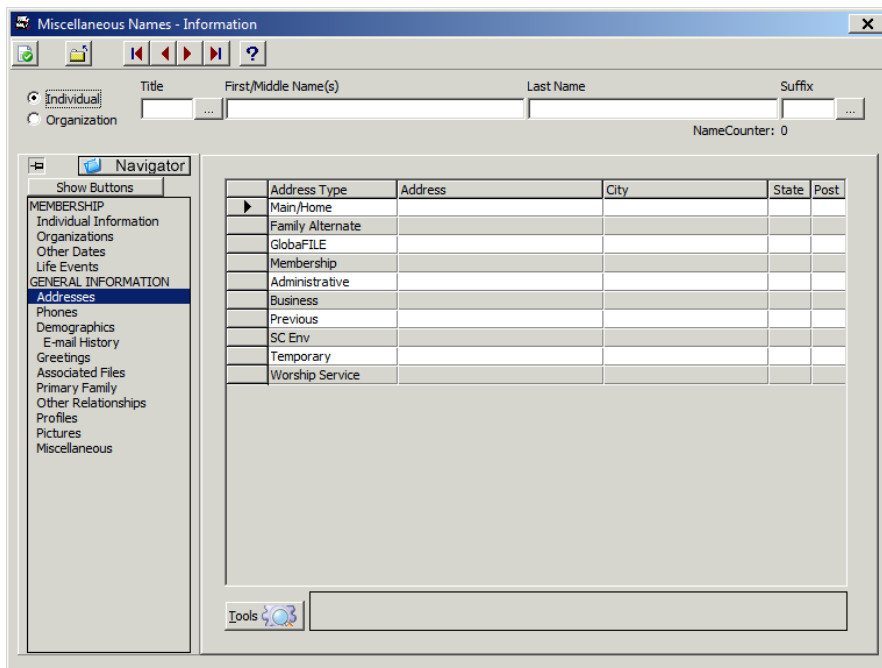


- Click on the Add button (the button that looks like a blank sheet of paper.)

Herald in Every Home Program Instructions



- Click No on this screen
- Add the name of the person you wish to add as a miscellaneous name. Click OK



- Add the First and Last names
- Click on Address and add a current address. Click on Profile to add the HIEH profile to the Misc. Name. Click on the Close icon to save all changed.
- Miscellaneous Names outside of your congregation should already be in your *Herald in Every Home* lists.

***Herald* in Every Home Program Instructions**

Payment of *Herald* in Every Home Subscription

Payment for the *Herald* in Every Home subscription will be based on the label list of who received a *Herald* in the current month. The amount for your monthly charge will be pulled from the congregation's bank account, just like IHQ pulls funds for the contributions. It is similar to a direct debit from the bank account.. This is done by-monthly. It is very important to keep your e-mail address correct in Shelby so you can receive this notification of money to be withdrawn.

Canadian Payment of *Herald* in Every Home

By-monthly statements will be sent to all Canadian congregations participating in the *Herald* in Every Home program. And due to the expense of getting payment in US funds, all Canadian congregations are invited to prepay for the year, or pay by credit card to save on the conversion costs.

Questions

If you have any questions regarding the *Herald* in Every Home program, please feel free to contact Herald House customer service at 1-800-767-8181.