Servant Keeper:
Becoming a Pro!

I. Administration Manager

    A. User Security: Setting up Users

        1. Each user should have their own unique user id and password and security settings.

    B. Backup Tool: Important for the Local database. A backup should be made as often as you use Servant Keeper.

    C. Restore Tool: used to restore a copy of a backup. Overwrites all existing data.

    D. Web Update: Servant Keeper 7 now automatically prompts you when an update is available.

    E. New Features of the Administration Manager.

II. Membership Manager

    A. Main List

        1. Select Group: allows you to choose a family group to display on the main list.

    B. Find Tool: Allows for quick searches. (CTRL+F)

    C. Family Profile: Where you track information that apply to the family as a whole.

        1. Changing the Address for a family.

    D. Speed Bar Tools: Have been moved to the Main toolbar in version 7.

        1. Have additional options when you click on the ▼.

    E. Adding a new Record/Editing an existing record.

    F. Individual Profile: Where you track information that applies to specific individuals in a family.

        1. Tabs

            a) Individual Profile

            b) Alt Address/Phone numbers

            c) Attributes

            d) Notes

            e) Important events

            f) More Info

            g) Overview

            h) Attachments (new in v7)

            i) Relatives (new in v7)

            j) Youth Ministry (new in v7)

            k) History (new in v7)

    G. Show Reminders: Gives you an overview of the important dates and notes.

NOTES:

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H. Tracking Attendance

    1. Select an event and date

    2. Add a visitor on the fly

    3. Generate Rosters

    4. Attendance Reporting

I. Moving Attendance from one record to another.

III. Groups Keeper

A. Create a new group

    1. Name the group

    2. Select a Field Search

    3. Select how to search the field

    4. Enter the item to search for

    5. Add the criteria

    6. Repeat the steps for additional criteria.

B. Selecting fields to display with the group results.

C. Advanced groups

    1. When to use the and/or and parentheses.

D. Emailing a group

    1. Emailing the tagged records in the group.

    2. Emailing the family members with the following relationships

E. Group reports

    1. Group Directories

    2. Mailing Labels

    3. Name Tags

F. Advanced Options

    1. Globally change fields can change information in the same filed for many profiles at once.

G. Merge Sk Writer letters and forms with the groups you create.

H. SK Wirter: Allows you to create letters and forms in Servant Keeper.

    1. Create an SKWriter letter

    2. Insert merge fields from the datafield category list (ALT+D)

    3. Insert .jpg or bmp images

    4. Insert end of document merge break.

IV. Using the Move to new family feature.

V. Recovering a Deleted Record.

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VI. Contribution Manager

   A. Basic Contribution entry

      1. Envelop Number entry

      2. Entry by Name

      3. Split Transaction entry

      4. Other/Non cash entry

      5. Loose Plate Entry

   B. Posting a Batch

      1. Unposted Transaction Reports

   C. Quicken/Quickbooks Setup

      1. Linking Servant Keeper Account to Income accounts In your account program

      2. Choose Accounting Program from System Preferences

   D. Generating Contribution Statements

      1. Basic Tab

         a) Select a date

         b) Print Statement for Individuals or families

         c) Statement types

         d) Report sections

      2. Contributors tab

         a) Allows you to search for specific individual, families or groups for which you want to generate statements.

      3. Accounts and options Tab

         a) Allows you to select the accounts you want to appear on the statements.

      4. Titles and Messages

         a) Allows you to edit the titles and thank you notes messages that appear in the statements.

      5. Logos and Signatures

         a) Allows you to select a .jpg or .bmp logo image and signature image for the statements

      6. Email Statements tab

         a) Where you configure your emails setting to email statements as a pdf attachment.

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E. Pledge Tracking

   1. Creating pledge accounts.

   2. Adding pledgers to an account.

   3. Copying Existing pledge account Information.

F. Payment account Tracking

   1. Can be used to track retreats and missions and more trips that your people pay for.

   2. Creating Payment accounts.

   3. Adding payers to an account.

   4. Copying existing payment account Information.

G. Edit Posted Entries

   1. Change Contributors: Allows you to move contributions from one person to another.

   2. Edit Single Transactions: Allows you to edit the payment type, check number, amount, account and more for a posted transaction.