Monthly Update List Instructions

Includes a new email address for submission and addition of "Preferred Name field"

Generating Monthly Update List for Subscribers and Donors

This list is sent monthly to MonthlyUpdateList@archstl.org to update subscriber and donor changes in your Servant Keeper database. Use the following table for St. Louis Review Codes and ACA codes.

St. Louis Review Codes	Code Definition
Y=YES	The family will receive a printed copy along with online access – the family has either made a *St. Louis Review* parish contribution; contributed $100+ to the parish during the previous year; or, if contributed less than $100 the pastor/parish office discerned the *St. Louis Review* should be sent to the family. All newly registered families should be a Y, unless they have declined to receive the Review
E=Electronic	The family has made a *St. Louis Review* contribution and requested online access only – a printed copy will not be sent.
N=No	The family will not receive the *St. Louis Review*, due to not meeting minimum contribution level of $100, not making a *St. Louis Review* parish contribution, or all members of the family are deceased.
O=Other	The family has moved or transferred – the family will receive the *St. Louis Review* for 3 months or until we learn more information. The family will not be on the parish subscriber list during this time.
D=Decline	The family specifically declined to receive the *St Louis Review*. You must receive this request in writing.
ACA CODES	**Code Definition**
Y=Yes	The family will be on the list to receive an ACA pledge card. All newly registered families ACA field should contain a Y
N=No	The family will not be on the list to receive a pledge card for the ACA

Important Everyday Servant Keeper Family Profile Updates

- When entering a new family make the Review field a Y and ACA field a Y
- When a family moves out of the parish or last family member passes away do not delete family record or address.

Table of Contents

Section 1

Creating Monthly Update List Group in Servant Keeper

Instructions for creating the monthly update group

1. **Open Membership Manager, Groups Keeper, Smart Groups**
2. Select "**Add Group**".

3. Name the group ***0 then "parish 3- digit number" Monthly Update*** *example: 0777 Monthly Update* (blue box)
4. Category Box *add* **Monthly Update** (orange box)
5. Show Results as: choose **Individuals** (pink box)
6. Check the **Include Disabled Records** box (orange arrow)
7. Filter Search Fields By: select **Show All Fields** (yellow box)
8. Create the group by adding the group criteria for your parish
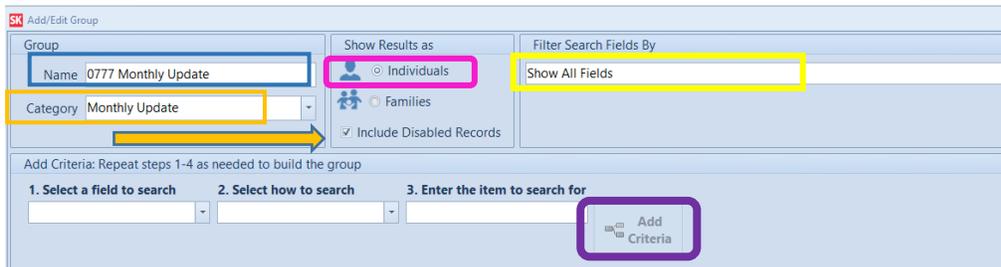
First Criteria

   a.   Step 1 (Select a field to search): select "**Relationship**" (Individual)

   b.   Step 2 (Select how to search the field): select "**Equal to**"

   c.   Step 3 (Enter the item to search for): select "**Head of Household**"

   d.   Click "**Add Criteria**" button (purple box)

   e.   Choose "**and**" between criteria

Member Status Criteria

   a.   Step 1 (Select a field to search): "**Member Status**" (Family)

   b.   Step 2 (Select how to search the field): "**Equal to**"

   c.   Step 3 (Enter the item to search for) "**Active Member**"

   d.   Click "**Add Criteria**" button (purple box)

   e.   Choose "**or**" between criteria

*Continue to build your group by adding criteria for **all** the "**Active**" member statuses used by your parish. Possible examples of Active members may include, Active not using envelopes, Active online giving, Active school family, etc. Use "or" between member status criteria. Do not include visitors, inactive, friends, etc.*

Deceased Criteria
a. Step 1 (Select a field to search): "**Member Status**" (Family) 👥 Member Status
b. Step 2 (Select how to search the field): "**Equal to**"
c. Step 3 (Enter the item to search for) "**Deceased**"
d. Click "**Add Criteria**" button
e. Choose "**or**" between criteria

Moved Criteria
a. Step 1 (Select a field to search): "**Member Status**" (Family) 👥 Member Status
b. Step 2 (Select how to search the field): "**Equal to**"
c. Step 3 (Enter the item to search for) "**Moved**"
d. Click "**Add Criteria**" button
e. Choose "**and**" between criteria
f. Place and open parenthesis before first active membership status and a closed parenthesis after moved status. Note: (*If you use other member statuses similar to moved, example: transferred or moved to another parish you need to add those additional criteria and place an "or" between criteria*)

9. Add the "**Date Last Edited**" fields according to instructions below. (red box below)

First "Date Last Edited" Criteria
a. Step 1 (Select a field to search): "**Date last edited**" (Family) 👥 Date Last Edited
b. Step 2 (Select how to search the field) "**Greater than or equal to**"
c. Step 3 (Enter the item to search for) "**Date**" enter **11/01/2024 if this is your first time creating this report** or enter a date which is one day greater than the ending date used for the previous monthly update report. This will be the date you last ran the Monthly Update report. If you are creating the next monthly update report using the sample above, you would use the date 09/19/2024. If you have not sent in a Monthly Update List in 2024, please use a beginning date of 1/01/24.
d. Click "**Add Criteria**" button
e. Choose "**and**" between criteria

Second "Date Last Edited" Criteria
a. Step 1 (Select a field to search): "**Date last edited**" (Family) 👥 Date Last Edited
b. Step 2 (Select how to search the field): "**Less than or equal to**"
c. Step 3 (Enter the item to search for) "**Date**" and **enter the current date.** The sample below was created on 09/18/2024.
d. Click "**Add Criteria**" button
e. Place an open parenthesis before first "**Date last edited**" and a closed parenthesis after the current date.

The picture to the right highlights the steps above. The example group created shows what was changed in the database from 08/03/2024 to 09/018/2024. **If this is your first time creating the group use 11/01/2024 as the beginning date.** (First date last edited)
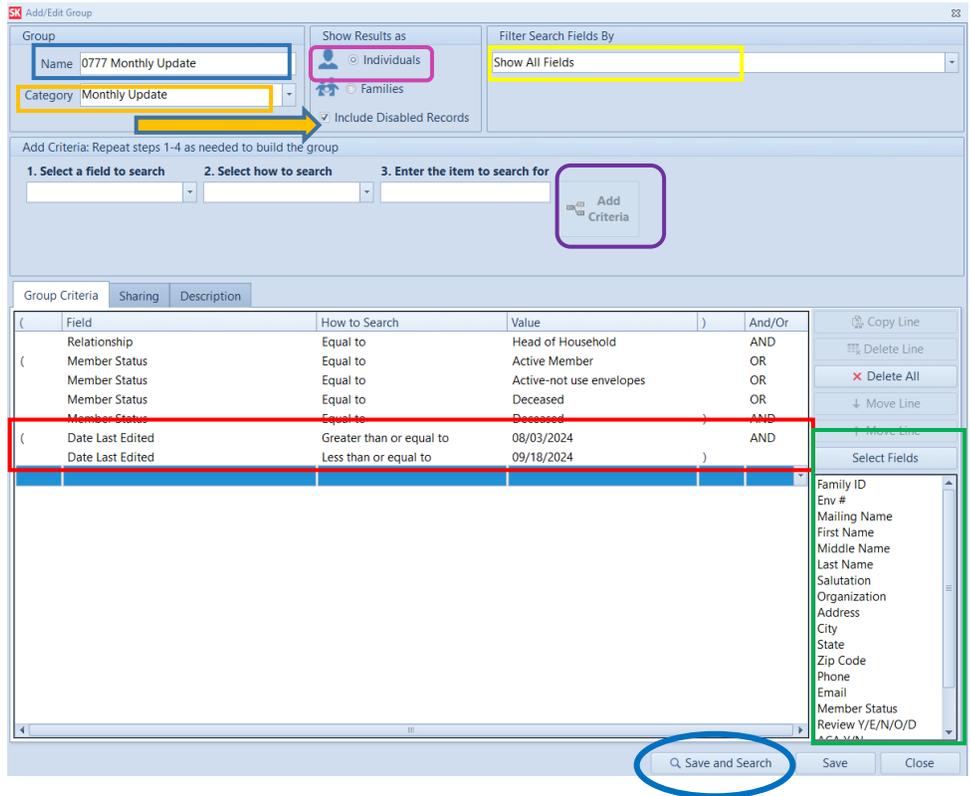
10. Click "**Select Fields**" button on the bottom right to select the fields for display. (green box above)
11. From the available fields list, select all the fields shown in the green box below. Highlight the field you want to select and click add. Once all have been selected, Click "**OK**" (orange box). The select field display closes.

Verify you have selected the correct fields in the correct order

Individual   Family
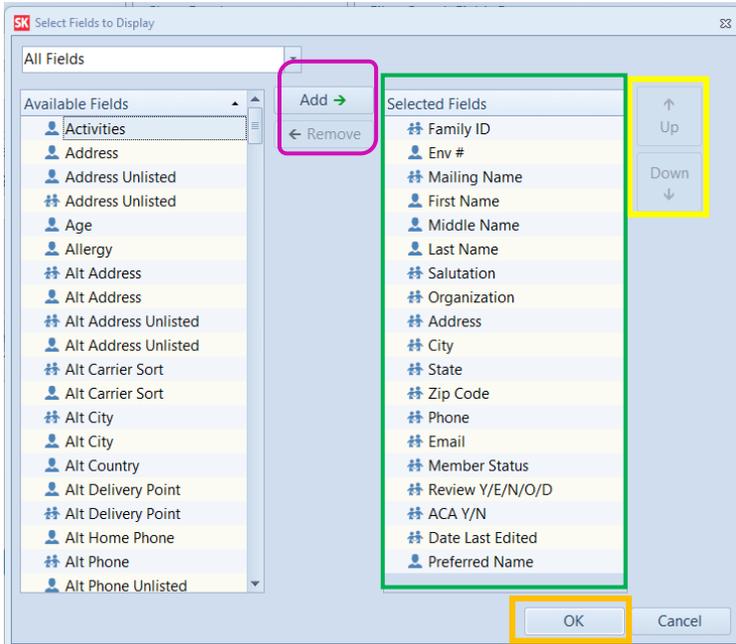
Building the group criteria is complete

12. Click "**Save and search**" to complete the Monthly Update group. (blue oval) The parish *0XXX monthly update* group is created and the monthly update list is generated. (shown on page 5)

The list created will only include those records that changed during the time requested. Check the report to make sure that deceased families are marked "N" in the Review and ACA Fields. Families that have moved should be labeled "O" in the Review field and N in the ACA field.

Some changes on this report may have no relevance to your Review or ACA list. This is not a concern.

13. Click "**Close**" The group will now be listed in your Smart Groups.

Direct Servant Keeper questions to the Parish and Curia Integration team at ParishCuriaIntegration@archstl.org or 314.792.7660.

Section 2

Generating the Monthly Update List

If your parish does not have the Monthly Update group already in created in Servant Keeper, please follow the Monthly Update instructions in Section 1 on page 2.

1. **Open Membership Manager, Groups Keeper, Smart Groups**
2. Select "0XXX monthly update" (Example 0777 monthly update). DO NOT create a new group each month. Only one group is needed. That group is edited for each update. (The Monthly Update List should be generated and sent monthly to MonthlyUpdateList@archstl.org)
3. Click "**Edit Group**"

4. Edit the "**Date Last Edited**" fields according to instructions below. (red box below)

The pictured to the right is an example group previously created. This group shows what was changed in your database from 05/3/24 to 08/2/24. To create your next update list, edit the last two criteria listed in the red box.
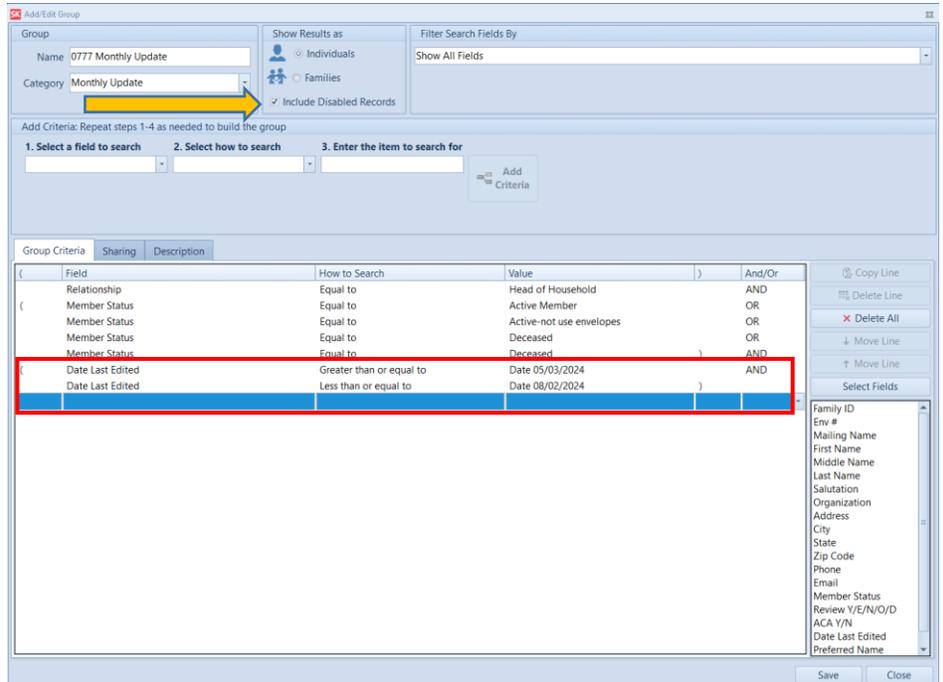
You will need to edit the last two criteria pertaining to the date last edited.

a. Step 1 (Select a field to search): "**Date last edited**" <mark>(Family)</mark>

      👫 Date Last Edited

b. Step 2 (Select how to search the field): "**Greater than or equal to**"

c. Step 3 (Enter the item to search for) "**Date**" enter a date which is one day greater than the ending date used for the previous monthly report generated. This is the date you last ran the Monthly Update report. Creating the next monthly update report using the sample above, you use the date 08/03/2024.

d. Click "**Add Criteria**" button

Second "Date Last Edited" criteria to edit

a. Step 1 (Select a field to search): "**Date last edited**" <mark>(Family)</mark>

      👫 Date Last Edited

b. Step 2 (Select how to search the field): "**Less than or equal to** "

c. Step 3 (Enter the item to search for) "**Date**" and **enter the current date.** The sample below was created on 09/18/2024.

d. Click "**Add Criteria**" button

Make sure the "Include Disabled Records" Box is checked (see orange arrow below)

Below is the sample group with the above edits made.

The example to the right is the new group created from the previous group above. This example was created to show what has changed in your database from 08/03/2024 to 09/18/2024.

5. Review the fields you have selected make sure all fields listed below are included and they are in the order shown below:

Verify you have selected the correct fields in the correct order

Individual   Family
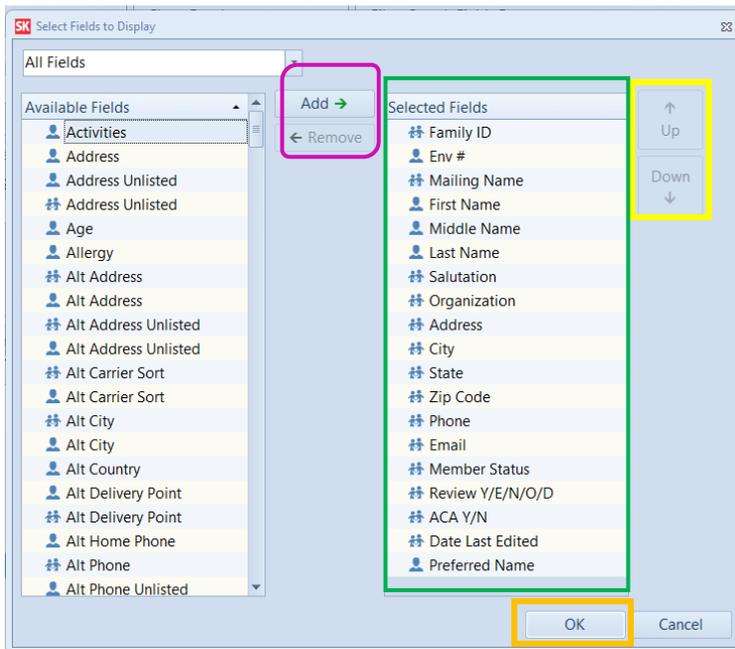
6. Click **Save**. The list will now be generated for the dates you selected.

Please be aware that the list generated above will only include those records that changed during the time frame requested. Please check your report to make sure those families that are deceased are labeled "N" in the Review and ACA Field. Those families that have moved should be labeled with an "O" in the Review field and N in the ACA field.

Some changes on this report may have no relevance to your Review or ACA list. This is not a concern.

7. Verify all data in all fields. Verify the Review and ACA fields are not blank. All records must have an address, city, state, and zip code. *Continue to step 8 even if the list is blank/empty.*

8. Select **Save As**. Choose **Microsoft Excel Spreadsheet** (File type Excel Spreadsheet .xls)
9. Save as an excel file in a folder or desktop using the file name *0 then "your parish 3- digit number" monthly update. Example: 0777 monthly update.*
10. Open the file and verify the columns are in the correct order as shown in the table below.

Excel Column	Excel Column Name	Excel Column	Excel Column Name
A.	👫 Family ID (Family)	K.	👫 State (Family)
B.	👤 Env # (Individual)	L.	👫 Zip Code (Family)
C.	👫 Mailing Name (Family)	M.	👫 Phone (Family)
D.	👤 First Name (Individual)	N.	👫 Email (Family)
E.	👤 Middle Name (Individual)	O.	👫 Member Status (Family)
F.	👤 Last Name (Individual)	P.	👫 Review Y/E/N/O/D (Family)
G.	👫 Salutation (Family)	Q.	👫 ACA Y/N (Family)
H.	👫 Organization (Family)	R.	👫 Date Last Edited (Family)
I.	👫 Address (Family)	S.	👤 Preferred Name (Individual)
J.	👫 City		

11. Email the saved file to **MonthlyUpdateList@archstl.org** with parish name, parish number and date report generated in subject line.

Direct questions to the Parish and Curia Integration team at ParishCuriaIntegration@archstl.org or 314.792.7660.

Section 3

Annual St. Louis Review Update Instructions

Instructions for St. Louis Review Servant Keeper Updates to be completed annually in February or March

In February/March the St. Louis Review list is updated with those parishioners who contribute over $100 to the parish and those that have paid for the Review. These updates will appear in the Monthly Update List by following the instructions below.

Review Contributions over 100"
1. Directions for making those who have given over $100 in the past year a "Y"

This group will include all Registered Members who have given at least $100 to the General Fund in the last calendar year. The group generates a list of those who gave at least $100 and are currently labeled with an N in the *Review* field. **The global change will change the** *Review* field to **Y**.

Parishes/Pastors may choose to send the St. Louis Review to all registered families regardless of their donation amount, if this is the case, you may skip this step. All active families would be labeled with a Y for Yes, or D for declined, or E for electronic Review.

1. Open **Membership Manager, Groups Keeper – Smart Group**
2. Select "**Add Group**" from toll bar above
3. Name your group: "**Review Contributions Over 100**"
4. Show Results as: "**Families**"
5. Filter Search Fields By: "**Show Contribution Fields**"
6. Add your criteria to group

   First Criteria
   a. Step 1. Select a field to search: "**Contribution**"
   b. Step 2. Select how to search: "**Equal to**"
   c. Step 3. Enter Item to search for: "**General Fund**" (or offertory equivalent)
   d. Contribution Date: **enter the dates of the last calendar year**. Example: **1/1/2024** and **12/31/2024**
   e. Total Gift: "**Greater than "**$**99.99**"
   f. Click "**Add criteria**" button on right
   g. Choose "**And**" between criteria

   Member Status Criteria
   a. Step 1. (Select a field to search) "**Member Status**"
   b. Step 2. (Select how to search) "**Equal to**"
   c. Step 3. (Enter item to search for) "**Active Member**"
   d. Click "**Add criteria**" button on right
   e. Choose "**Or**" between criteria if another member status will follow

*Continue to build your group by adding criteria for **all** the "**Active**" member statuses used by your parish. Possible examples of Active members may include, Active not using envelopes, Active online giving, Active school family, etc. Use "or" between member status criteria. Do not include visitors, inactive, friends, etc.*

f. If this is the last member status choose "**And**" before final criteria
g. If your criteria includes more than one member status place a parenthesis before the first member status and one after the last member status.

Final Criteria

a. Step 1 (Select a field to search) "**Review Y/E/N/N/O**"
b. Step 2. (Select how to search) "**Equal to**"
c. Step 3. (Enter item to search for) "**N**"
d. Click "**Add criteria**" button on right

Your group should look similar to the group below.
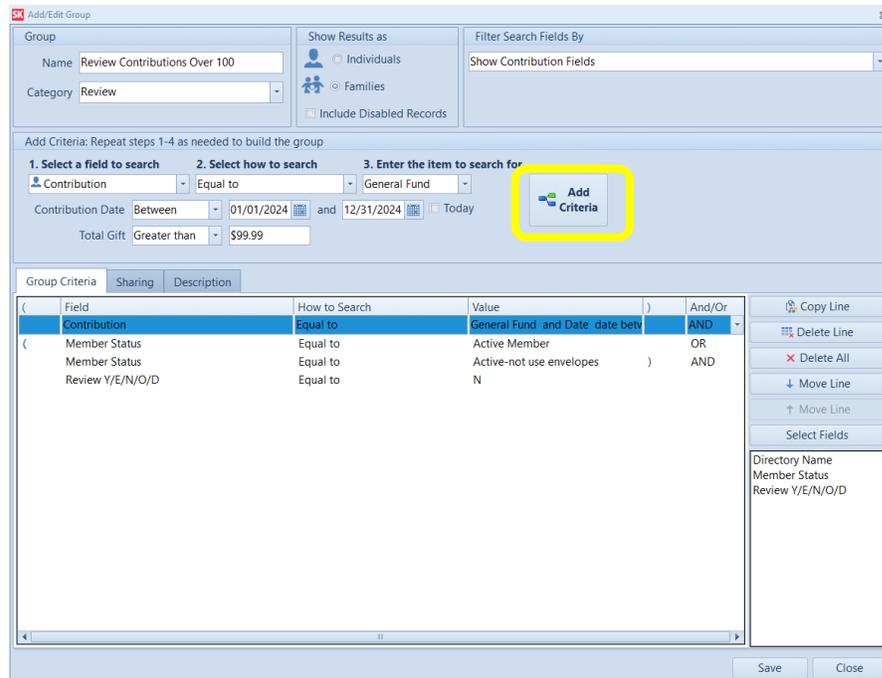
7. Click save. List is populated from the data base. Review list for irregularities. All records should be registered members with contributions of $100 or greater with the Review field containing **N**. All records on the list should be tagged.
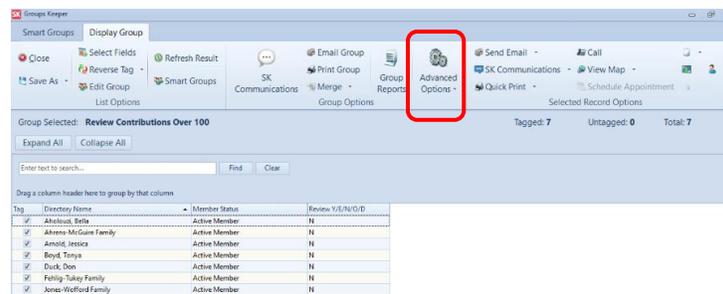
8. From the Group Display, click **Advanced Options**>**Globally Change Field**:
   a. Step 1 (Select field to be changed): *Review* **Y/E/N/O/D**
   b. Step 2 (Choose Action): **Replace with**
   c. Step 3 (Enter the item for change): **Y**
   d. Step 4 (Add the change): Click **Add.**
   e. Click **Apply Changes**
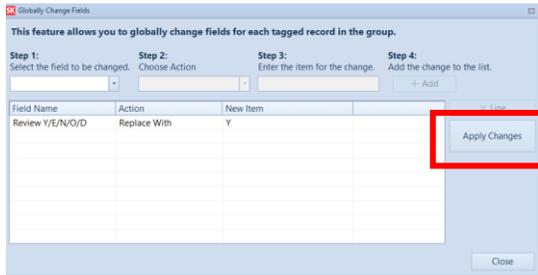   f. You receive a warning and are asked if you are sure you want to do this. Click yes. All tagged records will change to a **Y** in the *St. Louis Review* Field

2. Labeling those who have contributed to the *St. Louis Review* a "Y"

This group will include all those who have contributed over $1.00 to the "St. Louis Review" fund that currently contain a **N** in the Review Y/E/N/O/D field. By making a contribution to the "St Louis Review" fund, these parishioners become eligible to receive the Review. The global change will make their *Review* Y/E/N/O/D field a **Y.**

1. Open **Membership Manager, Groups Keeper – Smart Group**
2. Select "**Copy Group**" from tool bar above
3. Copy the **Review Contributions Over 100"** created above
4. Rename your group: "**Review Fund Contributors**"
5. Show Results as: "**Families**"
6. Filter Search Fields by: "**Show All Fields**"
7. Add the criteria to create group

Edit First Criteria
   a. Step 1 (Select a field to search): select "**Contribution**"
   b. Step 2 (Select how to search the field): select "**Equal to**"
   c. Step 3 (Enter the item to search for): select "*St. Louis Review*"
   d. Contribution Date choose "between" **11/1/2024** and **current date.** (Usually a February or March date) Total gift greater than **$1.00**.
   e. Click "**Add Criteria**" and choose "**And**" between criteria

Member Status Criteria – Do not need to edit

Review Y/E/N/O/D Criteria – Do not need to edit
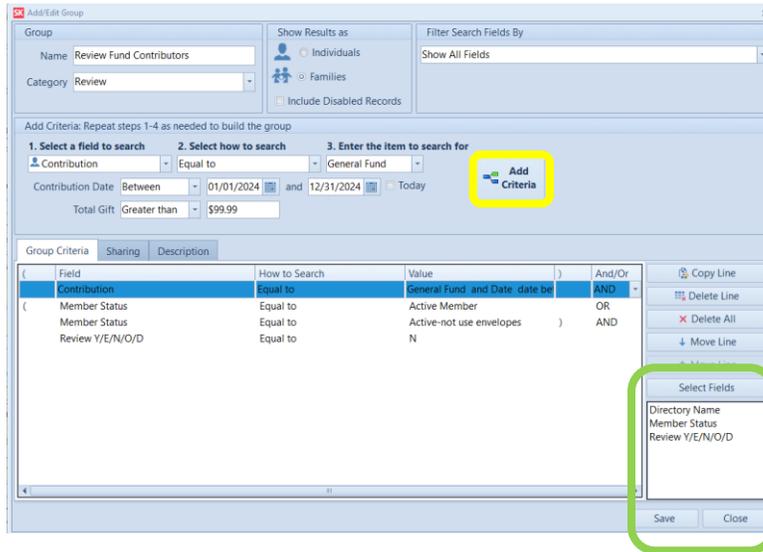
8. Click **Save**. List is populated from the data base. List contains Active families with contributions to the *St. Louis Review* Fund since 11/1/2024 greater than $1.00 with a Review status currently an **N**. All registered members records on the list should be tagged.
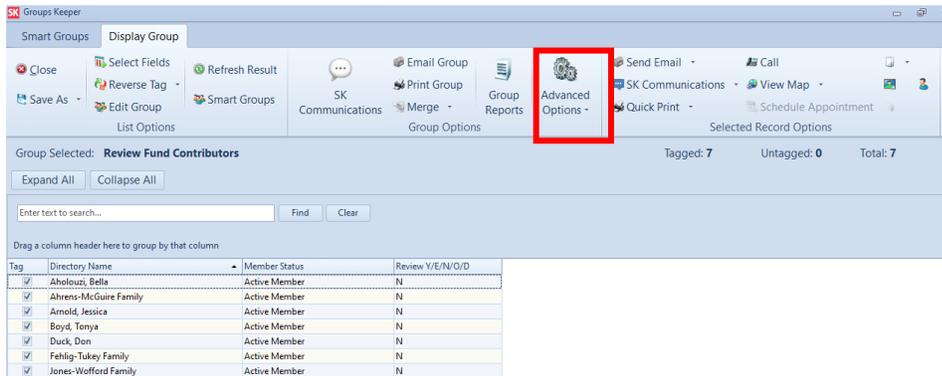
9. From the Group Display, click **Advanced Options>Globally Change Fields**
    a. Step 1 (Select field to be changed): *Review* **Y/E/N/O/D**
    b. Step 2 (Choose Action): **Replace with**
    c. Step 3 (Enter the item for change): **Y**
    d. Step 4 (Add the change): Click **Add**.
    e. Click **Apply Changes.**
    f. You receive a warning (See on warning on page 12and are asked if you are sure you want to do this. Click **Yes**. All those who have contributed to the *St Louis Review* will be made a **Y**

The global change will change those that contributed to the Review fund to a Y. When the change report is submitted, they will be added to your parish St. Louis Review subscriber list.

10. Once the updates are complete, generate the Monthly Update List (See Section 2) and email the saved file to **MonthlyUpdateList@archstl.org** with parish name, parish number and date report generated in subject line.

Direct questions to the Parish and Curia Integration team at ParishCuriaIntegration@archstl.org or 314.792.7660.