

## 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](mailto: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.*

<b>St. Louis Review Codes</b>	<b>Code Definition</b>
Y=YES	The family will receive a printed copy along with online access – the family has either made a <i>St. Louis Review</i> parish contribution; contributed \$100+ to the parish during the previous year; or, if contributed less than \$100 the pastor/parish office discerned the <i>St. Louis Review</i> 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 <i>St. Louis Review</i> contribution and requested online access only – a printed copy will not be sent.
N=No	The family will not receive the <i>St. Louis Review</i> , due to not meeting minimum contribution level of \$100, not making a <i>St. Louis Review</i> parish contribution, or all members of the family are deceased.
O=Other	The family has moved or transferred – the family will receive the <i>St. Louis Review</i> 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 <i>St Louis Review</i> . You must receive this request in writing.
<b>ACA CODES</b>	<b>Code Definition</b>
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.

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## Section 1

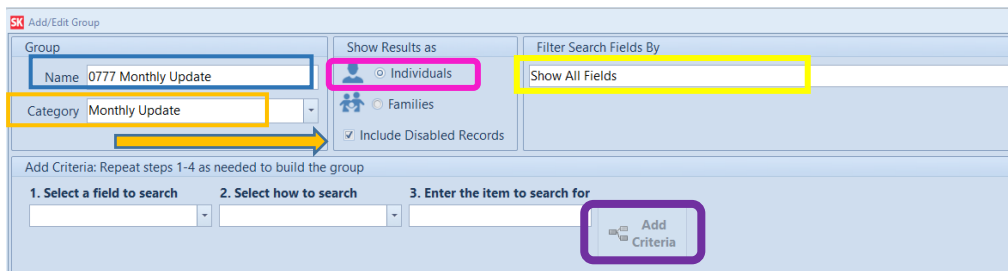
### Creating Monthly Update List Group in Servant Keeper

*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)  Relationship
- 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)  Member Status
- 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


- Step 1 (Select a field to search): “Member Status” (Family)  Member Status
- Step 2 (Select how to search the field): “Equal to”
- Step 3 (Enter the item to search for) “Deceased”
- Click “Add Criteria” button
- Choose “or” between criteria

#### Moved Criteria


- Step 1 (Select a field to search): “Member Status” (Family)  Member Status
- Step 2 (Select how to search the field): “Equal to”
- Step 3 (Enter the item to search for) “Moved”
- Click “Add Criteria” button
- Choose “and” between criteria
- Place an 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

- Step 1 (Select a field to search): “Date last edited” (Family)  Date Last Edited
- Step 2 (Select how to search the field) “Greater than or equal to”
- 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.
- Click “Add Criteria” button
- Choose “and” between criteria

#### Second “Date Last Edited” Criteria

- Step 1 (Select a field to search): “Date last edited” (Family)  Date Last Edited
- Step 2 (Select how to search the field): “Less than or equal to ”
- Step 3 (Enter the item to search for) “Date” and enter the current date. The sample below was created on 09/18/2024.
- Click “Add Criteria” button
- 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 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.

Family ID	Env #	Mailing Name	First Name	Middle Name	Last Name	Salutation	Organiz.	Address	City	State	Zip Code	Phone	Email	Member Status	Review Y/E/N/O/D	ACA Y/N	Date Last Edited	Preferred Name
73895346 374086IP		Mr. Brian Abdullah	Brian		Abdullah	Brian	No	PO Box 1243	Arnold	MO	63010	(314) 210-6545		Active Member	Y	Y	10/09/2024	Brian
73898840 189313IP	1116	Mr. Paul Adamec	Paul		Adamec	Paul	No	64 Sparrow Point Circle	Fenton	MO	63026	(636) 349-2490		Active Member	Y	Y	10/09/2024	Paul
73898840 192393IP	4270	Mr. Ronald Adkison	Ronald		Adkison	Ron	No	15 Romaine Spring Bend	Fenton	MO	63026	(314) 803-2608	r@gmail.com	Active Member	D	Y	10/09/2024	Ronald
73879830 133254IP	7	Mr. Juan Alcozer	Juan	A	Alcozer	Juan	No	14910 Joseph Meadows Ct	Florissant	MO	63034-1204	(314) 831-0260		Moved	O	N	10/09/2024	Juan
73485142 60377802	1470	Mr. Thomas Andrews	Thomas	Joseph	Andrews	Thomas	No	4038 Flora Pl	Saint Louis	MO	63110-3604	(314) 481-4289	bridgetsalsich@hotmail.com	Active-not use envelopes	Y	N	09/19/2024	Thomas
73806029 05264002		Miss Estelle Andrews	Estelle	Kay	Andrews	Estelle	No	4038 Flora Pl	Saint Louis	MO	63110-3604	(314) 481-4289		Active-not use envelopes	D	Y	09/19/2024	Estelle
73508739 15475202	10012	Mrs. Simonie Anzalone	Simonie	Lee	Anzalone	Simonie	No	6701 Oleatha Ave	Saint Louis	MO	63139	(314) 749-9995	sb@hotmail.com	Deceased	N	N	09/04/2024	Simonie
73568942 55029202	1482	Mr. and Mrs. Jim Apostol	Jim		Apostol	Jim and Jane	No	4008 Blaine Ave	Saint Louis	MO	63110	314-913-2353	jim_apostol@vwr.com	Active Member	Y	Y	09/04/2024	Jim

Direct Servant Keeper questions to the Parish and Curia Integration team at [ParishCuriaIntegration@archstl.org](mailto: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.*

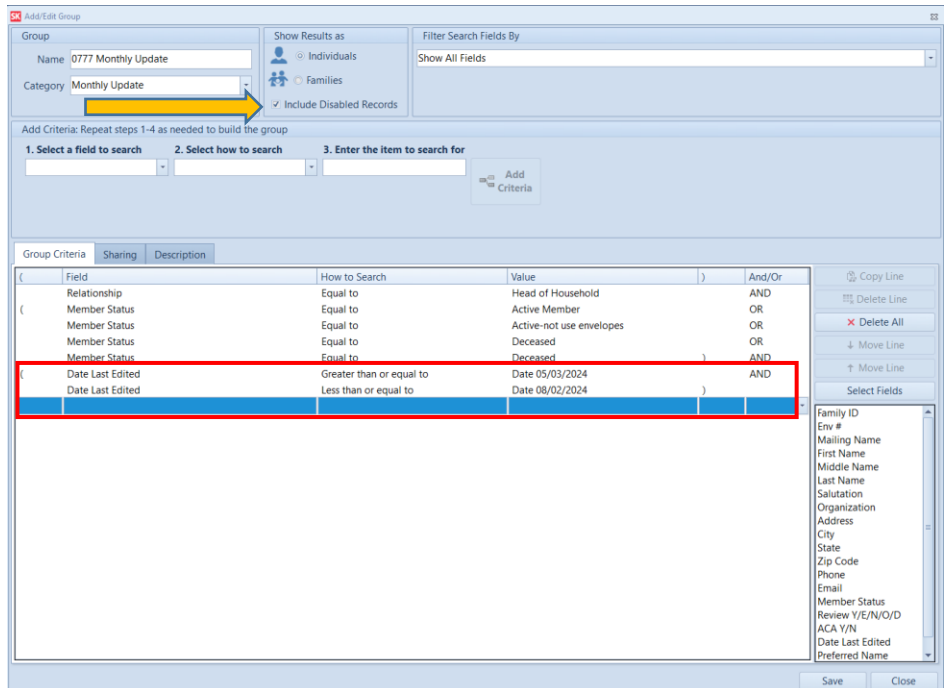
1. **Open Membership Manager, Groups Keeper, Smart Groups**
2. Select "OXXX monthly update" (Example 0777 monthly update). **DO NOT** create a new group each month. Only one group is needed. That group is edited for each update. (The Monthly Update List should be generated and sent monthly to [MonthlyUpdateList@archstl.org](mailto:MonthlyUpdateList@archstl.org))

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.*

### First "Date Last Edited" criteria to edit

- Step 1 (Select a field to search): **"Date last edited"** (Family) 
- Step 2 (Select how to search the field): **"Greater than or equal to"**
- 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.
- Click **"Add Criteria"** button

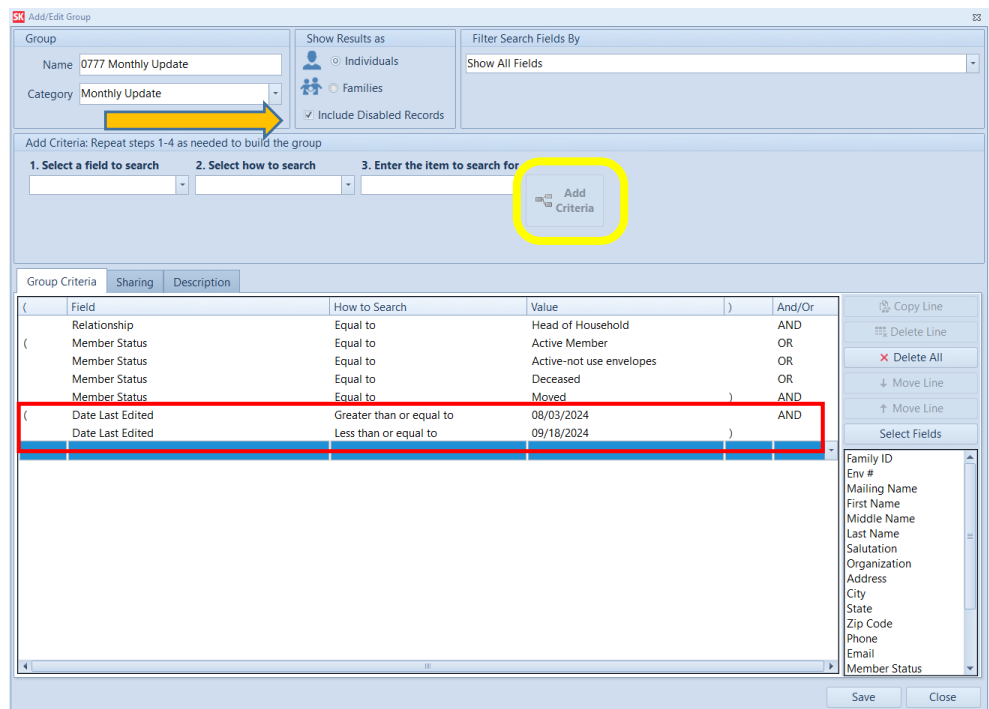
### Second "Date Last Edited" criteria to edit

- Step 1 (Select a field to search): **"Date last edited"** (Family) 
- Step 2 (Select how to search the field): **"Less than or equal to"**
- Step 3 (Enter the item to search for) **"Date"** and **enter the current date**. The sample below was created on 09/18/2024.
- Click **"Add Criteria"** button

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

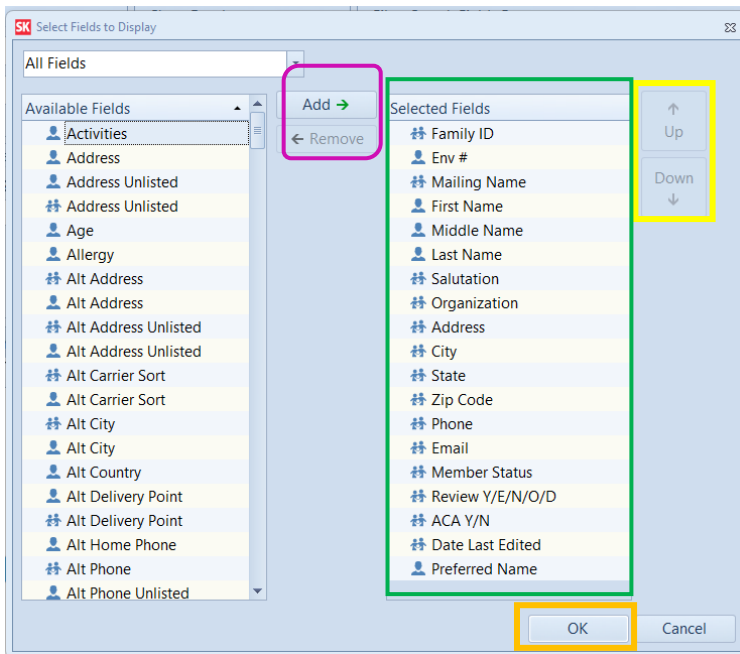
Below is the sample group with the above edits made.

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.



Field	How to Search	Value	And/Or
Relationship	Equal to	Head of Household	AND
Member Status	Equal to	Active Member	OR
Member Status	Equal to	Active-not use envelopes	OR
Member Status	Equal to	Deceased	OR
Member Status	Equal to	Moved	AND
Date Last Edited	Greater than or equal to	08/03/2024	AND
Date Last Edited	Less than or equal to	09/18/2024	

- 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.

Groups Keeper

Smart Groups

Display Group

Close

Select Fields

Reverse Tag

Edit Group

List Options

Save As

Refresh Result

Smart Groups

SK Communications

Print Group

Merge

Group Reports

Advanced Options

Send Email

SK Communications

Quick Print

Call

View Map

Schedule Appointment

Email Group

Group Options

Group

Options

Selected Record Options

Group Selected: 0777 Monthly Update

Tagged: 101

Untagged: 0

Total: 101

Expand All

Collapse All

Enter text to search...

Find

Clear

Drag a column header here to group by that column

Family ID	Env #	Mailing Name	First Name	Middle Name	Last Name	Salutation	Organiz	Address	City	State	Zip Code	Phone	Email	Member Status	Review Y/E/N/O/D	ACA Y/N	Date Last Edited	Preferred Name
73895346 3740060P		Mr. Brian Abdullah	Brian		Abdullah	Brian	No	PO Box 1243	Arnold	MO	63010	(314) 210-6545		Active Member	Y	Y	10/09/2024	Brian
73898840 1893131P	1116	Mr. Paul Adamec	Paul		Adamec	Paul	No	64 Sparrow Point Circle	Fenton	MO	63026	(636) 349-2490		Active Member	Y	Y	10/09/2024	Paul
73898840 1923931P	4270	Mr. Ronald Adkison	Ronald		Adkison	Ron	No	15 Romaine Spring Bend	Fenton	MO	63026	(314) 803-2608	r@gmail.com	Active Member	D	Y	10/09/2024	Ronald
73879830 1332541P	7	Mr. Juan Alcozer	Juan	A	Alcozer	Juan	No	14910 Joseph Meadows Ct	Florissant	MO	63034-1204	(314) 831-0260		Moved	O	N	10/09/2024	Juan
73485142 60377802	1470	Mr. Thomas Andrews	Thomas	Joseph	Andrews	Thomas	No	4038 Flora Pl	Saint Louis	MO	63110-3604	(314) 481-4289	bridget.salsich@hotmail.com	Active-not use envelopes	Y	N	09/19/2024	Thomas
73806029 05264002		Miss Estelle Andrews	Estelle	Kay	Andrews	Estelle	No	4038 Flora Pl	Saint Louis	MO	63110-3604	(314) 481-4289		Active-not use envelopes	D	Y	09/19/2024	Estelle
73508739 15475202	10012	Mrs. Simonie Anzalone	Simonie	Lee	Anzalone	Simonie	No	6701 Oleatha Ave	Saint Louis	MO	63139	(314) 749-9995	sb@hotmail.com	Deceased	N	N	09/04/2024	Simonie
73568942 55029202	1482	Mr. and Mrs. Jim Apostol	Jim		Apostol	Jim and Jane	No	4008 Blaine Ave	Saint Louis	MO	63110	314-913-2353	jim_apostol@vwr.co	Active Member	Y	Y	09/04/2024	Jim

**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		

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Family ID	Env #	Mailing Name	First Name	Middle Name	Last Name	Salutation	Organization	Address	City	State	Zip	Phone	Email	Member Status	Review Y/E/N/O/D	ACA Y/N	Date Last Edited	Preferred Name
1	73895346	374086IP	Mr. Brian Abdullah	Brian		Abdullah	Brian	No	PO Box 1243	Arnold	MO	63010	(314) 210-6545		Active Member	Y	Y	10/09/2024	Brian
2	73898840	1116	Mr. Paul Adamec	Paul		Adamec	Paul	No	64 Sparrow Point Circle	Fenton	MO	63026	(636) 349-2490		Active Member	Y	Y	10/09/2024	Paul
3	73898840	4270	Mr. Ronald Adkison	Ronald		Adkison	Ron	No	15 Romaine Spring Bend	Fenton	MO	63026	(314) 803-2608	r@gmail.com	Active Member	D	Y	10/09/2024	Ronald
4	73879830	133254IP	Mr. Juan Alcozer	Juan	A	Alcozer	Juan	No	14910 Joseph Meadows Ct	Florissant	MO	63034-1204	(314) 831-0260		Moved	O	N	10/09/2024	Juan
5	73485142	1470	Mr. Thomas Andrews	Thomas	Joseph	Andrews	Thomas	No	4038 Flora Pl	Saint Louis	MO	63110-3604	(314) 481-4289	bridgetsaish@hotmail.com	Active-not use envelopes	Y	N	09/19/2024	Thomas
6	73806029	05264002	Miss Estelle Andrews	Estelle	Kay	Andrews	Estelle	No	4038 Flora Pl	Saint Louis	MO	63110-3604	(314) 481-4289		Active-not use envelopes	D	Y	09/19/2024	Estelle
7	73508739	1001	Mrs. Simonie Anzalone	Simonie	Lee	Anzalone	Simonie	No	6701 Oleatha Ave	Saint Louis	MO	63139	(314) 749-9995	sb@hotmail.com	Deceased	N	N	09/04/2024	Simonie
8	73568942	1482	Mr. and Mrs. Jim Apostol	Jim		Apostol	Jim and Jane	No	4008 Blaine Ave	Saint Louis	MO	63110	314-913-2353	jim_apostol@vwr.com	Active Member	Y	Y	09/04/2024	Jim
9	00000000	1105	Mrs. Jessica Arnold	Jessica		Arnold	Jessica	No	360 Mission Bay Ct	Grover	MO	63040-1517	Unlisted		Active Member	N	Y	10/09/2024	Jessica
10	00000000	1015	Mr. & Mrs. Mark Baer	Markus		Baer	Mark & Laura	No	4206 Flad Ave	Saint Louis	MO	63110	(314) 664-4152		Active Member	Y	Y	09/12/2024	Mark
11	00000000	1106	Dr. Mike Bahr & Dr. Chris Bahr	Michael	Welton	Bahr	Mike & Chris	No	3920 Blaine Ave	Saint Louis	MO	63110-2631	(314) 577-6214		Active Member	Y	Y	09/12/2024	Mike
12																			

11. Email the saved file to [MonthlyUpdateList@archstl.org](mailto: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](mailto: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.

The screenshot shows the 'Add/Edit Group' window. The 'Group' section has 'Name: Review Contributions Over 100' and 'Category: Review'. The 'Add Criteria' section shows three criteria: 'Contribution' (Equal to, General Fund, 01/01/2024 to 12/31/2024), 'Total Gift' (Greater than, \$99.99), and 'Review Y/E/N/O/D' (Equal to, N). The 'Add Criteria' button is highlighted with a yellow box. The 'Group Criteria' table is shown below.

Field	How to Search	Value	And/Or
Contribution	Equal to	General Fund and Date betw	AND
Member Status	Equal to	Active Member	OR
Member Status	Equal to	Active-not use envelopes	AND
Review Y/E/N/O/D	Equal to	N	

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.

The screenshot shows the 'Groups Keeper' window. The 'Group Selected' is 'Review Contributions Over 100'. The 'Advanced Options' button is highlighted with a red box. The list of members is shown below.

Tag	Directory Name	Member Status	Review Y/E/N/O/D
<input checked="" type="checkbox"/>	Ahluwalia, Bala	Active Member	N
<input checked="" type="checkbox"/>	Akenna McGuire Family	Active Member	N
<input checked="" type="checkbox"/>	Amadi, Imita	Active Member	N
<input checked="" type="checkbox"/>	Boyd, Tonya	Active Member	N
<input checked="" type="checkbox"/>	Duck, Don	Active Member	N
<input checked="" type="checkbox"/>	Felling-Takey Family	Active Member	N
<input checked="" type="checkbox"/>	Jones-Hofford Family	Active Member	N

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

This feature allows you to globally change fields for each tagged record in the group.

Step 1: Select the field to be changed. Step 2: Choose Action. Step 3: Enter the item for the change. Step 4: Add the change to the list.

Field Name	Action	New Item
Review Y/E/N/O/D	Replace With	Y

Apply Changes

Close

WARNING!!! You are about to apply these changes to every one of the tagged records.

Are you sure you want to do this?

Yes No

## 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**.

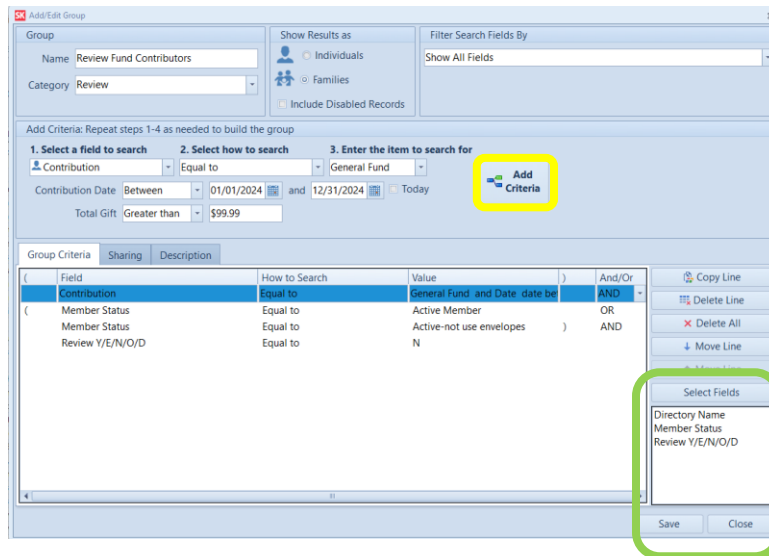
1. Open **Membership Manager, Groups Keeper – Smart Group**
2. Select “**Copy Group**” from tool bar above
3. Copy the **Review Contributions Over 100”** created above
4. Rename your group: “**Review Fund Contributors**”
5. Show Results as: “**Families**”
6. Filter Search Fields by: “**Show All Fields**”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

### **Edit First Criteria**

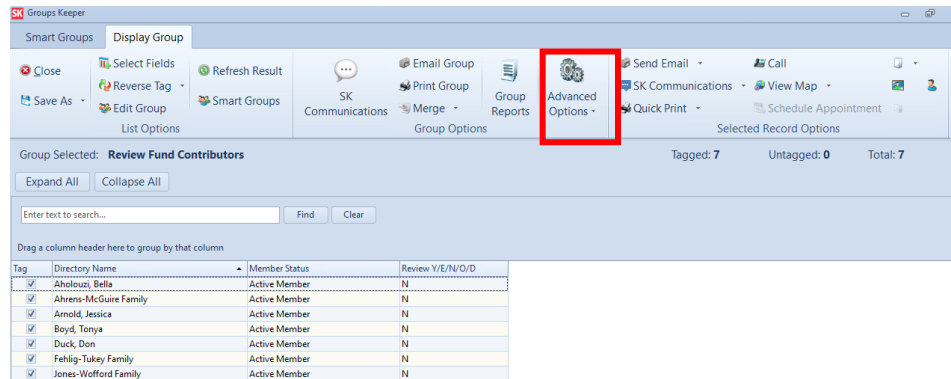
- a. Step 1 (Select a field to search): select “**Contribution**”
- b. Step 2 (Select how to search the field): select “**Equal to**”
- c. Step 3 (Enter the item to search for): select “**St. Louis Review**”
- d. Contribution Date choose “between” **11/1/2024** and **current date**. (Usually a February 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 12 and 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](mailto: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](mailto:ParishCuriaIntegration@archstl.org) or 314.792.7660.