ACA PARISH LIST INSTRUCTIONS

ACA Parish Lists are due to the ACA Office by Friday, December 8, 2023. Parishes submitting their list and completing the online questionnaire by the due date will be awarded one parish incentive ticket.

In order to unify and simplify the instructions for all versions of *Servant Keeper*, we have established these instructions for you to create an ACA "donor list" file and email it directly to the ACA office.

If you have already created your ACA Group

If you have already created your ACA group, please use it to create the list file. Your list should only include those members you wish to solicit for the ACA. Please ensure your list contains the following fields before sending it to the ACA Office. <u>Please note that "Family ID" and "Member Status" are required fields</u>. If you need to run a global change to update the "ACA Y/N" field, please see the instructions beginning on page 5.

NOTE: The field names are shown as they are listed in Servant Keeper 8; if you have a different version of Servant Keeper, some of these fields may be named slightly differently than what is shown below.

- I. Fields Needed for the ACA group (please add to your group in this order):
 - a. Family ID (0123456789012345)
 - b. Env # (1234)
 - c. Mailing Name (Mr. & Mrs. John Doe)
 - d. Last Name (Doe)
 - e. First Name (John)
 - f. Address (123 Fake Street)
 - g. City (St. Louis)
 - h. State (MO)
 - i. Zip Code (12345-1234)
 - j. ACA Y/N (could be Y, N, A, G, blank, or any other value)
 - i. This field is used to indicate whether a member should be included in your ACA list. It should only contain a "Y" or an "N" but depending on how long your parish has been using Servant Keeper, this field may include any of the following codes: N=No; Y=Yes; G=General Donor; A=Advanced Donor. Those members marked with an "N" in the ACA field should be excluded from your final list. Any other value (including blanks) should be included.
 - k. Preferred Name (Johnny)
 - I. Home Phone (123-456-7890)
 - m. Salutation (John and Sue)
 - n. Email Address (john@abc.com)
 - o. Member Status (Active)
- 2. Common mistakes when creating the ACA Group
 - a. Including all family members rather than just <u>head of household</u>.
 - b. Including deceased members, visitors, businesses, friends and others you may not wish to solicit.
 - c. Forgetting to include one of the above requested fields.
- 3. When your group correctly shows those members you wish to include on your ACA list, export it by choosing "Save as" > "<u>Microsoft Excel Spreadsheet</u>" and saving to your desired location. (A text file is NOT acceptable.) **Please include your parish name and number in the file name.**
- 4. Once you have exported your list, please attach the file to an email and send to AA_Parish_Files@archstl.org. PLEASE INCLUDE YOUR PARISH NAME AND NUMBER ON THE SUBJECT LINE OF THIS EMAIL.

If you encounter any challenges or have any questions, please contact the Parish Support Office at 314.792.7716 or 314.792.7072.

If you have not created your ACA Group

If you have not yet created the ACA group, please follow the steps listed below.

- I. In Groups Keeper, create a new group.
- 2. Enter the Group Name: "ACA Parish List" (or something similar)
- 3. Select Show > Individuals
- 4. Select Show Fields for: > Show All Fields
- 5. Add the necessary criteria:
 - a. Step I (Select a field to search): ACA
 - b. Step 2 (Select how to search the field): "Not Equal to"
 - c. Step 3 (Enter the item to search for): "N"
 - d. Click the "Add Criteria button"
 - a. Step I (Select a field to search): Relationship
 - b. Step 2 (Select how to search the field): "Equal to"
 - c. Step 3 (Enter the item to search for): "Head of Household"
 - d. Click the "Add Criteria button"

When complete, your Group Criteria should look like this:

SK Add/Edit Group			
Group	Show Results as	Filter Search Fields By	
Name ACA Parish List	Individuals	Show Individual Fields	
	A O Families		
Category ACA			
Add Criteria: Repeat steps 1-4 as needed to build t	he group		
1. Select a field to search 2. Select how to	search 3. Enter the ite	m to search for	
· · · · · · · · · · · · · · · · · · ·	*	Add	
		"\" Criteria	
Group Criteria Sharing Description			
(Field	How to Search	Value)	And/Or Copy Line
ACA Y/N	Not Equal to	N	AND
Relationship	Equal to	Head of Household	==x Delete Line
			✓ X Delete All
			↓ Move Line
			↑ Move Line
			Select Fields
			Family ID
			Env #
			Mailing Name
			First Name
			Address
			City
			Zip Code
			ACA Y/N
			Preferred Name
			Salutation
			E-Mail
			Member Status
с			
		Q Save and Se	earch Save Close

6. Under Select Fields, add them in this order. Depending on your Servant Keeper version, some of these fields may be named slightly differently than what is shown below. <u>Please note that "Family</u> <u>ID" and "Member Status" are required fields.</u>

- a. Family ID (0123456789012345)
- b. Env # (1234)
- c. Mailing Name (Mr. & Mrs. John Doe)
- d. Last Name (Doe)
- e. First Name (John)
- f. Address (123 Fake Street)
- g. City (St. Louis)
- h. State (MO)
- i. Zip Code (12345-1234)
- j. ACA Y/N (could be Y, N, A, G, blank, or any other value)
 - i. This field is used to indicate whether a member should be included in your ACA list. It should only contain a "Y" or an "N" but depending on how long your parish has been using Servant Keeper, this field may include any of the following codes: N=No; Y=Yes; G=General Donor; A=Advanced Donor. Those members marked with an "N" in the ACA field should be excluded from your final list. Any other value (including blanks) should be included.
- k. Preferred Name (Johnny)
- I. Home Phone (123-456-7890)
- m. Salutation (John and Sue)
- n. Email Address (john@abc.com)
- o. Member Status (Active)

This list contains a mixture of family fields and individual fields. This is indicated by the icon next to the field listing:



The following screenshots show the fields as they should be included:

Select Fields to Display						23
All Fields		-				
				_		
Available Fields		Add →	Selected Fields		Ϋ́	
Activities		← Remove	👪 Family ID		Up	
L Address			👤 Env #			1
Address Unlisted			🖶 Mailing Name		Down	
<table-of-contents> Address Unlisted</table-of-contents>			👤 Last Name	=	\downarrow	
👤 Age			👤 First Name			
👤 Allergy			🖶 Address			
👬 Alt Address			🖶 City			
Alt Address			🖶 State			
👬 Alt Address Unlisted			🖶 Zip Code			
Alt Address Unlisted			🖶 ACA Y/N			
👬 Alt Carrier Sort			Preferred Name			
Alt Carrier Sort	Ŧ		Lome Phone	Ŧ		
			ОК		Cancel	

Select Fields to Display					23
All Fields	-				
Available Fields	Add →	Selected Fields		•	
L Activities	Remove	👤 First Name		Up	
L Address		🛃 Address			1
Address Unlisted		👬 City		Down	
👬 Address Unlisted		👪 State		4	
👤 Age		👪 Zip Code			
👤 Allergy		🖶 ACA Y/N			
👬 Alt Address		Preferred Name	=		
👤 Alt Address		L Home Phone			
👬 Alt Address Unlisted		🖶 Salutation			
L Alt Address Unlisted		👤 E-Mail			
👬 Alt Carrier Sort		🖶 Member Status			
Larrier Sort	•		Ŧ		
		ОК		Cancel	

- 7. Click "Save" to display the group.
- 8. When the group loads, make sure all information is listed correctly. Any missing data/blank fields displayed in this list will need to be corrected.
 - a. Common mistakes when creating the ACA group
 - i. Including all family members rather than just head of household.
 - ii. Including deceased members, visitors, businesses, friends, those that have moved and others you may not wish to solicit.
 - iii. Forgetting to include one of the above requested fields.
- 9. When your group correctly shows those members you wish to include on your ACA list, choose "Save as" > "Microsoft Excel Spreadsheet" and save to your desktop. (A text file is NOT acceptable.) Please include your parish number in the file name.

2		Sec. of							Group	ps Keeper				100		100	- 0 - X
	Smart Group	s Display	y Group														
	Save Sele	ct Reverse ds Tag *	Edit Group	(Refresh Result	Smart Groups	Email Pr Group Gro	int Merge	Group Reports	Advanced Options *	ii Send Email ★	View N Sched Copy	Map + Iule Appointm Address +	ent 🧊 A	iew Picture ssign Envelope # Ipen Profile			
	Group Li	st Snapshot					Group O	ptions			Selecte	ed Record Opt	ions				and (a) to the for
Drag	g a c Phd a u	ft Excel Sprea	adsheet	mn						-		K	ecord(s) Ta	999ed: 64 +	(ecoro(s) Untagge	a: U Total Rec	ord(s) in List: 64
Tag	Falling to Mic	rosoft Excel S	preadsheet	,ie		Last Name	First Name	Address		City	State	Zip Code	ACA	Preferred Name	Home Phone	Salutation	E-Mail
V	2	205	Jonathan &	Maryanne	Smith	Smith	Jonathan	315 S. Main S	Street	Jersey Shore	PA	17740-1723	у	Jon	(555) 398-1334	Jon & Maryanne	LovinServantKp =
V	000000000000000 8	173	Ed & Janet N	Newman		Newman	Ed	300 Front St		Jersey Shore	PA	17745-1243	у	Ed	(717) 555-4934	Ed & Janet	en@servantpc.c
V	00000000000000 3	130	Mr. & Mrs. [Dave Chen	iey	Cheney	Daniel	346 Front Str	eet	Jersey Shore	PA	17740-1766	у	Dave	(717) 555-9874	Dave & Olga	Mail@mail.com
V	000000000000000 8	214	Mr. & Mrs. K	Ken Terk		Terk	Kenneth	7 Orchard Hi	ill Rd	Jersey Shore	PA	17740-1772	у	Ken	(717) 555-1299	Ken & Maureen	Mail@mail.com
V	000000000000002 3	157	Mr. & Mrs. N	Mike Mitch	hell	Mitchell	Mark	5 Garth Rd		Avis	PA	17721-1887	У	Mike	(717) 555-1883	Mike & Kelly	Mail@mail.com
V	000000000000002 8	101	Mr. & Mrs. J	lohn Arnol	ld	Arnold	John	300 Front Str	eet, Apt 1	Lock Haven	PA	17745	у	Jim	(717) 555-1234	John & Marcie	Jim@mail.com
V	00000000000003 3	228	Mr. & Mrs. J	loe Wilson		Wilson	Joe	455 Highland	d St	Lock Haven	PA	17745-1277	у	Joe	(717) 555-3094	Joe & Danielle	Mail@mail.com
V	00000000000003 8	199	Mr. & Mrs. H	Harry Saltr	nan	Saltman	Harold	1433 Dodge	Ave	Willliamsport	PA	17701-1276	у	Harry	(717) 555-4545	Harry & Mary	Mail@mail.com
V	00000000000000000000000000000000000000	202	Dennis & Na	adine Shay	<i>'</i>	Shay	Dennis	1444 S Ambl	er Rd	Avis	PA	17721-1926	У	Dennis	(717) 555-9944	Dennis & Nadine	Mail@mail.com
V	000000000000004 4	128	Mr. Scott Bri	unoli		Brunoli	Scott	85 Chump R	d	Avis	PA	17721-1722	у	Scott	(717) 555-4884	Scott	Mail@mail.com
V	00000000000004 7		Mr. Nick Bla	ickstone		Blackstone	Patty	755 Maple A	ve	Jersey Shore	PA	17740-1455	у	Patty	(717) 555-1322	Nick	PB_J@mail.com
V	00000000000005 1	167	Mr. & Mrs. E	Damion M	uthler	Muthler	Damion	855 Fourth S	treet	Avis	PA	17721-1245	у	Damion	(717) 555-9978	Damion & Lisa	Mail@mail.com
V	00000000000005 4	211	Mr. & Mrs. J	lohn Stetse	on	Stetson	John	74 Furnace R	lun Rd	Jersey Shore	PA	17740-1922	У	John	(717) 555-8839	John & Sue	Mail@mail.com
۹ 🗆		1					11				-		1				•

10. Once you have saved your list file, please attach the file from your desktop to an email and send to AA_Parish_Files@archstl.org. PLEASE PUT YOUR PARISH NAME AND NUMBER ON THE SUBJECT LINE OF THIS EMAIL.

Global Change to Update ACA Field

If you have not done so recently, each parish should run a global change in order to update the ACA field which is used to exclude those families that should not be on your ACA list. As families are added to the database, the ACA field (a custom family field in SK8) should have been populated with either a "Y" or an "N". Those families that have a member status of **Deceased**, **Moved**, **Transferred**, or **Visitor** should be marked with an "N" and should not be included in your ACA list. This global change will fix the ACA field if it was not updated when the member status was changed. If there are other member status values used in your database that should be excluded (e.g. "School Family"), you may also change them with this process.

- I. Go to your Membership Manager
- 2. Open Groups Keeper
- 3. Create a New Group
- 4. Enter the Group Name: "Global Change--ACA" (or something similar)
- 5. Select Show> "Families"
- 6. Check the Include Disabled Records box
- 7. Add your Criteria to the group
 - a. Step I (Select a field to search): select "Member Status"
 - b. Step 2 (Select how to search the field): select "Equal to"
 - c. Step 3 (Enter the item to search for): select "Deceased"
 - d. Click "Add Criteria" button
 - e. Repeat steps a. d., searching for "**Moved**", "**Transferred**", and "**Visitor**". Make sure that the end of each line says "OR" (not "AND"). When finished, your group should look like this:

SK Add/Edit Group					23
Group	Show Results as	Filter Search Fields By			
Name ACA Global Change	L O Individuals	Show Family Fields			•
Category ACA	 ↔ ⊙ Families ✓ Include Disabled Records 				
Add Criteria: Repeat steps 1-4 as needed to build the	group				
1. Select a field to search 2. Select how to se	earch 3. Enter the item to	o search for			
*	*	™ ^{(III} Add Criteria			
Group Criteria Sharing Description					
(Field	How to Search	Value)	And/Or	强 Copy Line
(Member Status	Equal to	Deceased		OR	III. Delete Line
Member Status	Equal to	Moved		OR	
Member Status	Equal to	Transferred		OR	× Delete All
Member Status	Equal to	Visitor)	AND	↓ Move Line
ACA Y/N	Not Equal to	N			A Maus Line
				*	T Move Line
					Select Fields
<					Directory Name Member Status ACA Y/N Review Y/E/N/O/D Address
					Save Close

- 8. Click Save & Search
- 9. From the Group Display, click Advanced Options > Global Change:

- Sibul	os Keeper															-	f
Sma	rt Groups	Displa	y Group														
8 Close	E Save	Select I	Reverse	🐝 Edit	(3) Refresh	🐝 Smart	iii Email	S	🗐 Merge	Group		🥩 Send Emai 弟 Quick Print	l 👻 絕 View t 👻 🔍 Sche	v Map → edule Appointme	🔁 Vi	ew Picture ssign Envel	ope
	As *	Fields	Tag + List Optic	Group	Result	Groups	Group	Group	• Group C	Reports options	Options -	🚛 Call	Cop Sele	y Address 👻 cted Record Opti	ons 🕹 O	pen Profile	
Group	Selected	: ACA GI	lobal Cha	ange								Ta	agged: 8	Untagged:	0	Total: 8	
Evna			A.II.														
Lxpa	nd All	Collapse	All														
Enter Drag a	text to sea	Collapse arch eader here	to group l	by that co	lumn	Find	Clear										
Enter Drag a	text to sea	Collapse arch eader here y Name	to group l	by that co Member S	lumn tatus	Find	Clear ACA Y	/N	F	leview Y/E/	N/0/D	Address					
Enter Drag a Tag	text to see column he Director Brown, I	Collapse arch eader here y Name Donald	to group l	by that co Member S Moved	lumn tatus	Find	Clear ACA Y	<u>′N</u>	F	Review Y/E/	N/O/D	Address 3918 Flora Pl	lace				
Enter Drag a Tag	text to sea column he Director Brown, I Cross, Ma	Collapse arch eader here y Name Donald artin & Dav	to group l	by that co Member S Moved Moved	lumn tatus	Find	Clear ACA Y/ Y Y	/N	F	teview Y/E/	N/0/D	Address 3918 Flora Pl 4173 Clevelar	lace nd Ave				
Enter Drag a Tag V	text to see column he Director Brown, I Cross, Ma Joerger, A	Collapse arch eader here y Name Donald artin & Day Andrew an	to group l vn l d Laurel l	by that co Member S Moved Moved Moved	lumn tatus	Find	Clear ACA Y, Y Y Y	/N	F	leview Y/E/	N/0/D	Address 3918 Flora Pl 4173 Clevelar 4119 Shaw Bl	lace nd Ave Ivd				
Enter Drag a Nag V	column he Director Brown, I Cross, Ma Joerger, A Klitzing,	Collapse arch eader here y Name Donald artin & Dav Andrew an Joseph & Ja	to group l 1 vn d Laurel anet	by that co Member S Moved Moved Moved Moved	lumn tatus	Find	Clear ACA Y, Y Y Y Y Y	'n	F P P P	leview Y/E/	N/0/D	Address 3918 Flora Pl 4173 Clevelar 4119 Shaw Bl 3716 Hartfor	lace nd Ave Ivd d Street				
Enter Drag a Cag	column he Director Brown, I Cross, Ma Joerger, A Klitzing, Ray, Jon	Collapse arch eader here y Name Donald artin & Dav Andrew an Joseph & Ja	to group l to d Laurel 1 anet	by that co Member S Moved Moved Moved Moved Moved	lumn tatus	Find	Clear ACA Y, Y Y Y Y Y Y Y	/N	F P P P P	Review Y/E/ I I I I I	N/O/D	Address 3918 Flora Pl 4173 Clevelat 4119 Shaw Bl 3716 Hartfor 3885 Utah Pla	lace nd Ave Ivd d Street ace Apt. A				
Enter Drag a V V V V	nd All text to sec Directory Brown, I Cross, Ma Joerger, A Klitzing, Ray, Jon Reitenba	Collapse arch eader here y Name Donald artin & Dav Andrew an Joseph & Ja ch, Jo Ann	to group l 1 vn d Laurel 1 anet	by that co Member S Moved Moved Moved Moved Moved Moved Deceased	lumn tatus	Find	Clear ACA Y, Y Y Y Y Y Y Y	/N	F P P P P	Review Y/E/ I I I I I I I I I I I I I I I I I I	N/O/D	Address 3918 Flora Pl 4173 Clevelat 4119 Shaw Bl 3716 Hartforn 3885 Utah Pl 4242 Grace A	lace nd Ave lvd d Street ace Apt. A ve				
Enter Drag a V V V V V	text to see column he Director Brown, I Cross, Ma Joerger, 4 Klitzing, Ray, Jon Reitenba Sherrock	Collapse arch eader here y Name Donald artin & Dav Andrew an Joseph & Ja sch, Jo Ann c, Raymond	to group l to group l to group l to group l to group l l	by that co Member S Moved Moved Moved Moved Moved Deceased Moved	lumn tatus	Find	Clear ACA Y, Y Y Y Y Y Y Y Y	/N	F P P P P	teview Y/E/	N/O/D	Address 3918 Flora Pl 4173 Clevelat 4119 Shaw Bl 3716 Hartfor 3885 Utah Pl 4242 Grace A 843 Atalanta.	lace nd Ave lvd d Street ace Apt. A ve Ave				

- 10. Fill out the options for the global change:
 - a. Step I (select the field to be changed): ACA Y/N (or whatever it is called in your database)
 - b. Step 2 (choose action): Replace with
 - c. Step 3 (enter the item for the change): N
 - d. Step 4 (add the change to the list): click add button
 - e. Step I (select the field to be changed): Review Y/E/N/O/D
 - f. Step 2 (choose action): Replace with
 - g. Step 3 (enter the item for the change): N
 - h. Step 4 (add the change to the list): click add button

This global change will also update your St. Louis Review field at the same time.

When finished, the global change screen should look like this:

Globally Change Fields	/ou to gl	obally	hange field	s for e	ach tagge	d record in t	he group	.	
Step 1: Select the field to be ch	nanged.	Step 2: Choose J	Action		Step 3: Enter the it	tem for the ch	ange. A	Step 4: Add the chang	ge to the list.
	-			-				+ Add	
Field Name	Actio	n	New Item						× Line
ACA Y/N	Repla	ce W	N						
Review Y/E/N/O/D	Repla	ice W	N						Apply Changes
									-
									Class

- II. Click "Apply Changes" button
- 12. Close group. (If you save this group, you can run the global change from it each year to update those members whose statuses have changed).