Parish Scatter Map Report

(Instructions are based on Servant Keeper 8.1)

Open membership Manager and click on the Groups Keeper Tab. This will open the Smart Groups and you will see your list of available groups. Search the list for Status Animarum Household Report previously created.

Status Animarum – Households: This group is used to determine the number of households in the parish. **This list should include all families registered in the parish**. The Parish Scatter Map report will be created by copying this report and making a few edits. Please follow the instructions below.

Highlight the Status Animarum Household group found on your list in Group Keeper.

SK Groups Keeper							- E X
Smart Groups Display Group							
Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system							
Double click on a group to view that group or click on "Add Group" to create a new group Expand All Collapse All							
Drag a column header here to group by that column							
Group Name Include Disable Category Type Created By Created Date Member Status Equal to "Active Member" OR							Member Status Equal to "Active Member" OR
👤 school grade	No		Public	Michele	02/02/2021		Member Status Equal to
L Shelley Training familiesgroup	No		Public	Shelley Lang	02/10/2023		"Active-not use envelopes" OR
👤 Shelley Training group	No		Public	Shelley Lang	01/19/2023		Active" OR
Spouse Contributions over \$100	No		Public	Michele	02/02/2023		Member Status Equal to
👤 Status Animarum - Catholics	No	Status	Public	Sally	05/07/2018		"Nursing Home Resident" OR
👤 Status Animarum - Contributors	Yes	Status	Public	Sally	05/07/2018		Member Status Equal to "On-line
🚓 Status Animarum - Households	No	Status	Public	Michele	03/24/2021		Giving
🚓 Status Animarum - Mixed Households	No	Status	Public	Sally	05/07/2018		
🚓 Status Animarum- Catholic Households	No	Status	Public	Sally	05/07/2018		Group Description
👤 STL Review - Annual change	No		Public	Michele	01/08/2019		All Family Records

Go to the top of the page and click on "Copy Group"

You will see the following message - "You are about to copy the selected group. Are you sure you want to do this?" Click on **"Yes".**



The copied group opens

SK Add/Edit Group			23					
Group	Show Results as	Filter Search Fields By						
Name Parish Scatter Map Category Status	 Individuals Individuals Include Disabled Red 	Show Family Fields						
Add Criteria: Repeat steps 1-4 as needed to buil	d the group							
1. Select a field to search 2. Select how to search 3. Enter the item to search for								
•	•	™ Add Criteria						
Group Criteria Sharing Description								
(Field	How to Search V	alue) And/Or	🖺 Copy Line					
Member Status	Equal to A	ctive Member OR	Delete Line					
Member Status	Equal to A	active-not use envelopes OR	Y Delete All					
Member Status	Equal to Ir	n-Active OR	× Delete All					
Member Status	Equal to N	Jursing Home Resident OR	↓ Move Line					
			Move Line					
			Select Fields					
			Mailing Name Address Zip Code					
			Save Close					

In the "Group Name field" rename the group Parish Scatter Map (Red box).

In the "Show Results As" field Family should be selected (Yellow circle).

In the "Filter Search Fields By" "**Show Family Fields**" should be selected (Purple box). Use the down arrow to change if necessary.

Verify that the search criteria is still correct for your parish. This should remain the same unless you have added new member statuses for your registered members (Orange box). Your group should be similar to the group pictured above.

Click on "Select Fields" box. (Green box)

Select the following fields in the **order** listed below:

- Mailing Name
- Address
- Zip Code

vailable Fields	•	Add →	Selected Fields	\uparrow
👬 ACA Y/N		← Remove	👬 Mailing Name	Up
🖶 Address Unlisted	=		👬 Address	
🖶 Alt Address			👬 Zip Code	Down
👬 Alt Address Unlisted				\downarrow
🖶 Alt Carrier Sort				
🖶 Alt City				
👬 Alt Delivery Point				
🖶 Alt Phone				
🖶 Alt Phone Unlisted				
🖶 Alt State				
👬 Alt Zip Code				
TT AIL ZIP COUE				
Arrier Route				
Carrier Route Census Updated				

If you have more fields listed, remove them by selecting the unwanted field and click on "**Remove**" to move them to the left.

Available Fields	*	Add 🗲	Selected Fields		1
🖶 From Date		← Remove	🖶 Mailing Na	me	Up
# Geographic Zone			++ Address		
# Include in Directory			👬 Zip Code		Down
🖶 Mailing List			# Member St	atus	+
H Organization					
🖶 Phone					
# Phone Unlisted					
# Primary Contact					
# Residence					
H Review Y/E/N/O/D					
# Salutation	×				
# Secondary Contact					
44 State					
ra State	÷				
H To Date					
# To Date				-	

Once Mailing Name, Address and Zip Code are the only fields selected, click "OK". (Green box)

5K Add/Edit Group				Σ				
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Category Status -	 Families Include Disabled R 	lecords						
Add Criteria: Repeat steps 1-4 as needed to build the group								
1. Select a field to search 2. Select how to	search 3. Enter t	he item to search for						
•	•		■√ Griteria					
Group Criteria Sharing Description								
(Field How	w to Search	Value) And/Or	🕼 Copy Line				
Member Status Equ	ial to	Active Member	OR	Delete Line				
Member Status Equ	ual to	Active-not use envelope	es OR	M Dalata All				
Member Status Equ	ual to	In-Active	OR	× Delete All				
Member Status Equ	ial to	Nursing Home Resident	OR	↓ Move Line				
Member Status Equ		On-line Giving		↑ Move Line				
				Select Fields				
۹	m			Mailing Name Address Zip Code				
				Save Close				

Verify fields are selected correctly, then click "Save". (Red box) The group will open and a list of parish families is generated showing the **Mailing name**, **Address** and **Zip code** for all the families registered in the parish.

SK Groups Keep	er				× • • ×		
Smart Gro	ups Display Group						
Clos Sav	e Select Reverse Edit Fields Tag - Group List Options	Image: Non-AmplitudeImage: Non-AmplitudeRefreshSmartResultGroups	Email Group SPrint Group G Merge Re Group C	Group eports Options	Send Email View Map View Picture SQuick Print Call Copy Address Selected Record Options		
Group Selec Expand Al Enter text Drag a colu	Group Selected: Parish Scatter Map Tagged: 854 Untagged: 0 Total: 854 Expand All Collapse All Collapse All Enter text to search Find Clear Image: Clear						
Tag Mail ✓ Dr. & ✓ Dr. &	ing Name Mrs. Al Squitieri Mrs. Barry Hendrickson Mrs. Darrell Carroll Mrs. Garry Robben Mrs. Geoffrey Hill Mrs. Gina Clemens	 Address 1621 Bec 3647 Flor 2846 Cali 13006 W 4137 She 3806 Flor 	Address 1621 Beckham Ridge Ct 3647 Flora Pl 2846 California Ave 13006 W Moore Meadows Ct 4137 Shenandoah Ave 3806 Flora Pl				

Click on "Save As" (Pink box above).

Select "Microsoft Excel Spreadsheet" (Blue box below)



Save the document to your desktop or a folder. Name the document with your parish name and number followed by Scatter Map. Example: **111 Holy Ghost Scatter Map**

Please attach to email and send to JohnSchwob@archstl.org by Wednesday, May 10th.

If you have questions or need any assistance, please contact Parish Support. Their contact information is listed below.

Michele Fisher 314.792.7829 or <u>michelefisher@archstl.org</u> Shelley Lang 314.792.7072 or <u>shelleylang@archstl.org</u> Sally Serbus 314.792.7716 or <u>sallyserbus@archstl.org</u>