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. ***Please note that "Family ID" and "Member Status" are required fields.*** If you need to run a global change to update the "ACA Y/N" field, please see the instructions beginning on page 10.

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.

1. 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)
    l. 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 head of household.
    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" > "Microsoft Excel Spreadsheet" 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.

1. 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 1 (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 1 (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:

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. ***Please note that "Family ID" and "Member Status" are required fields.***

    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)
    l. 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:

-Individual field: -Family Field:

The following screenshots show the fields as they should be included:
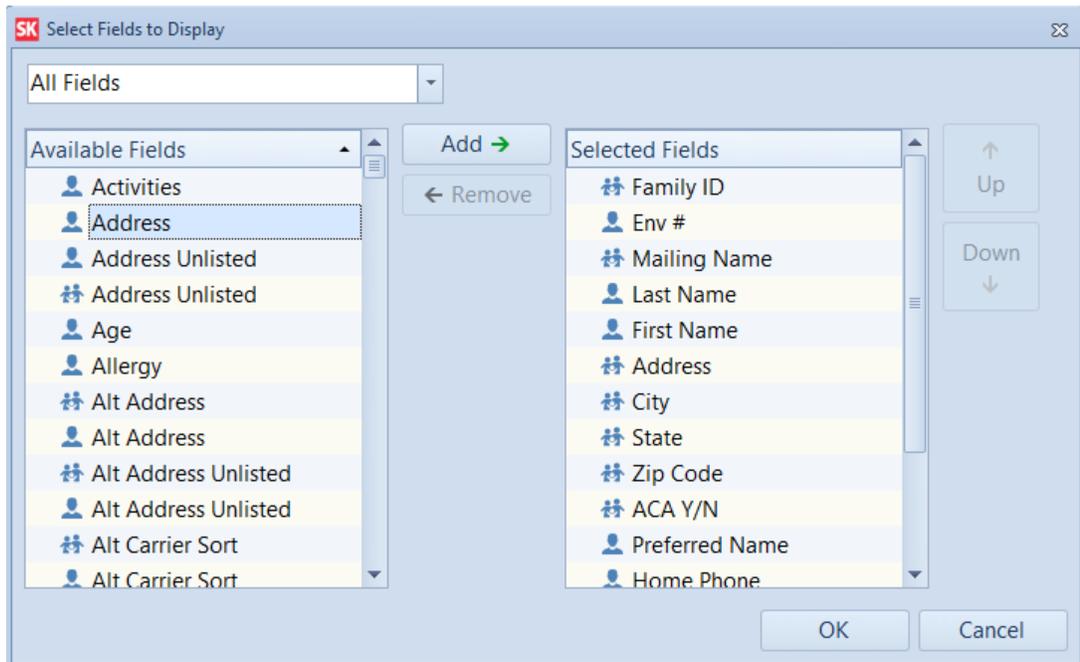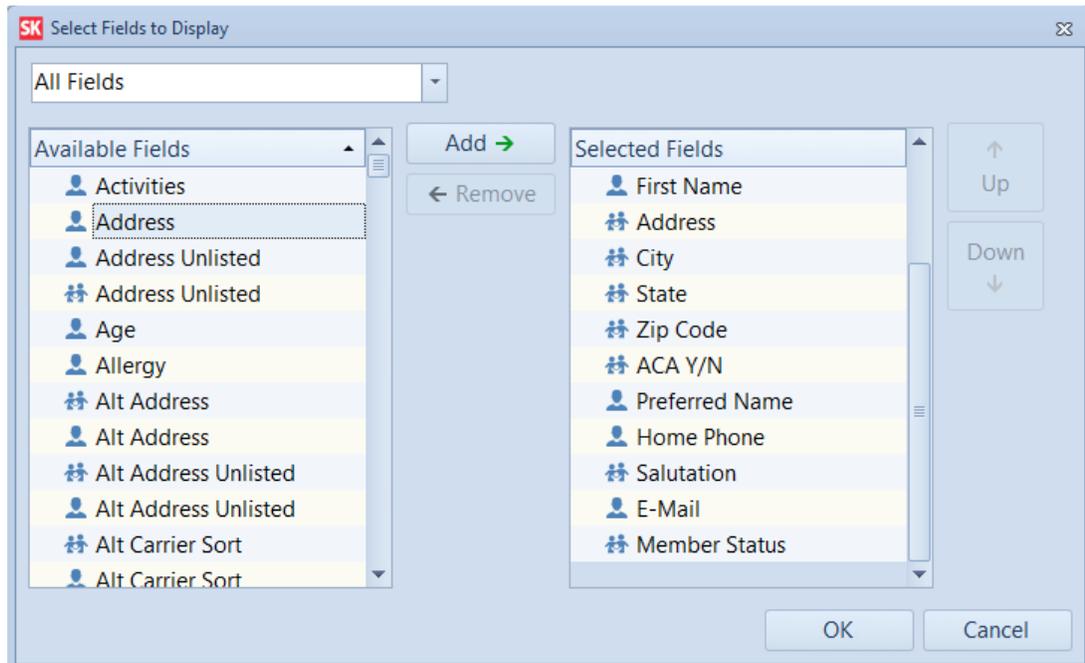
7. Click "Save" to display the group.
8. When the group loads, make sure all information is listed correctly. Any missing data/blank fields displayed in this list will need to be corrected.
    a. Common mistakes when creating the ACA group
        i. Including all family members rather than just head 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.**
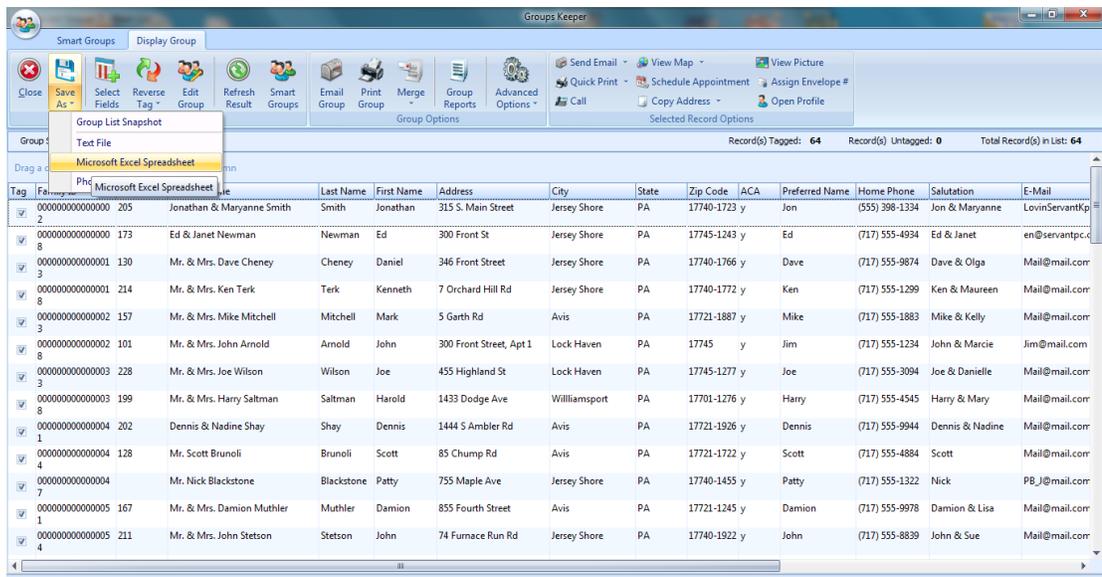
10. Once you have saved your list file, please attach the file from your desktop to an email and send to AA_Parish_Files@archstl.org. *PLEASE PUT YOUR PARISH NAME AND NUMBER ON THE SUBJECT LINE OF THIS EMAIL.*

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.

1. 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 1 (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:

8. Click Save & Search
9. From the Group Display, click Advanced Options > Global Change:
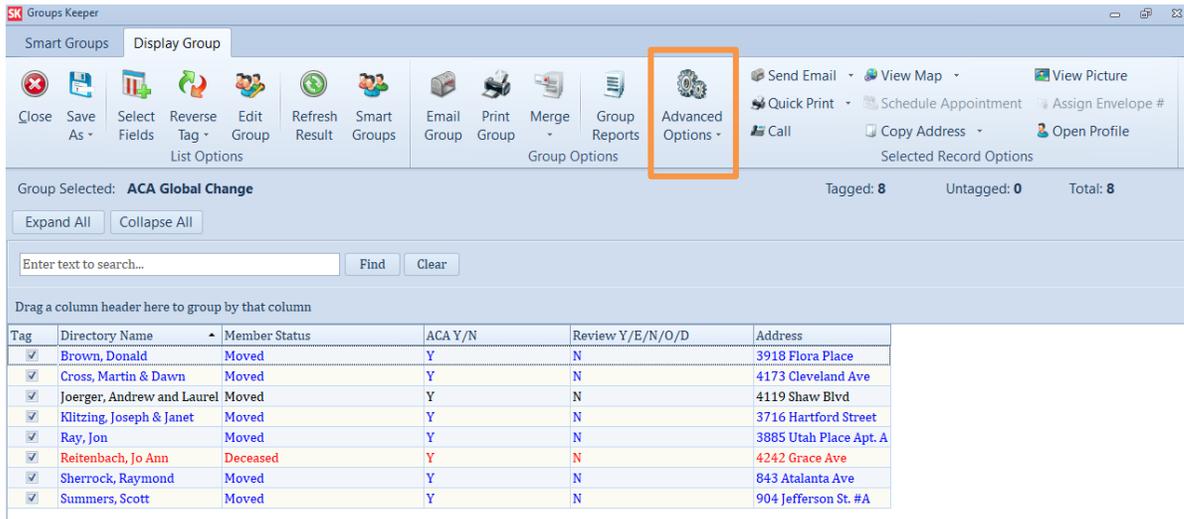
10. Fill out the options for the global change:
    a. Step 1 (select the field to be changed): ACA Y/N (or whatever it is called in your database)
    b. Step 2 (choose action): Replace with
    c. Step 3 (enter the item for the change): N
    d. Step 4 (add the change to the list): click add button
    e. Step 1 (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:
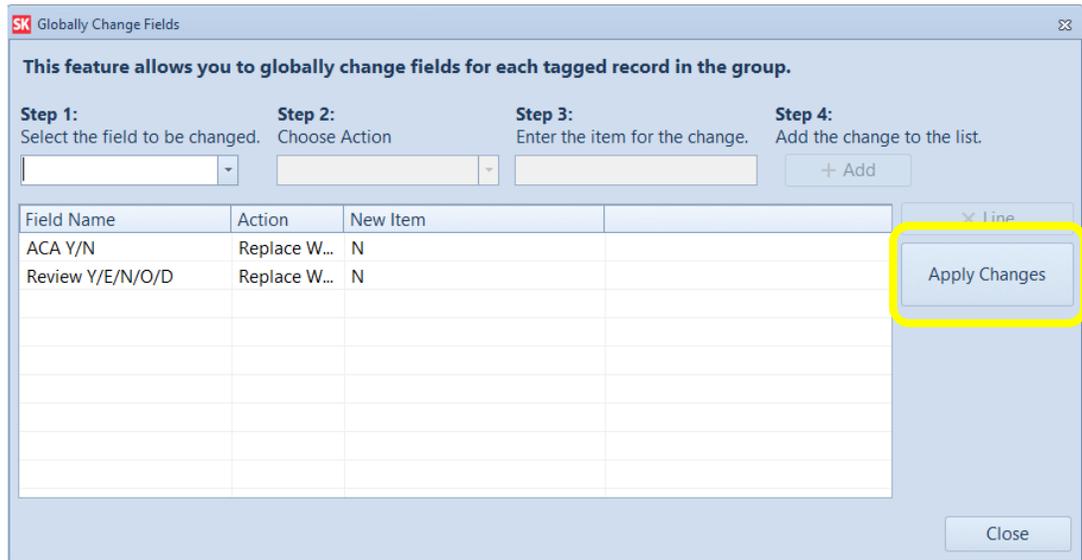
11. Click "Apply Changes" button
12. Close group. (If you save this group, you can run the global change from it each year to update those members whose statuses have changed).