

Generating Annual St. Louis Review Report

(Complete Annually in February/March)

Important Everyday Servant Keeper Updates

- When entering a new family make the Review field a Y and ACA field a Y
- If a family wants to receive the Review electronically mark the family Review field with an E
- If a family declines to receive the review, mark their Review field with a D
- When a family moves, change the Review field to an O, unless they have declined to receive the St. Louis Review. In that case it remains a D. Do not delete the address.
- When the last family member passes away, make the family Review field a N
- Do not delete the family record when family moves or last family member dies.

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 <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.
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.

Open Membership Manager>Groups Keeper>Smart groups. Look for the following groups you should have created in previous years.

Review Contributions over 100”
“Review Fund Contributors”
“0### Monthly Update – 0### (0 and then your parish number)

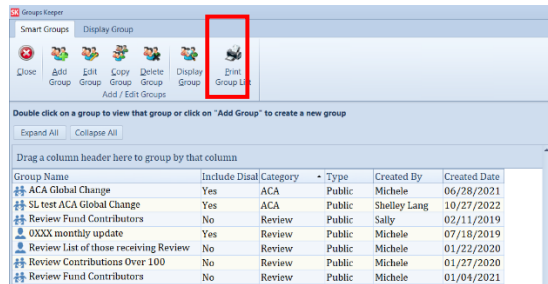
If you did not create these groups previously proceed to the Addendum and following the instructions to create these three groups.

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 will generate a list of those who gave at least \$100 and are currently marked with an N in the *Review* field. **The global change will change the Review field to Y.**

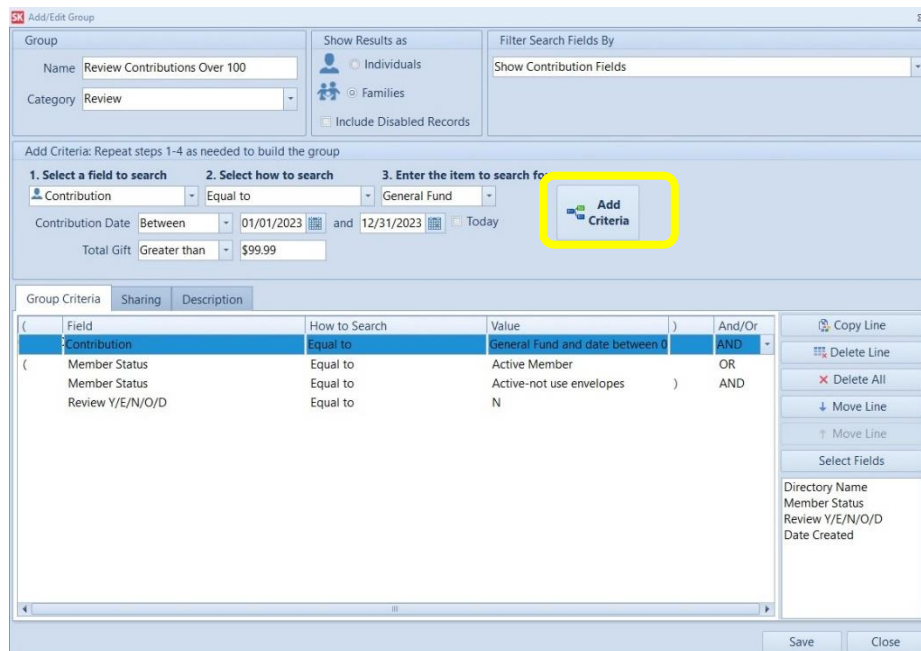
Parishes/Pastors may choose to send the St. Louis Review to all registered families regardless of their donation amount, if this is the case, you may skip this step. All active families would be marked with a Y for Yes, or D for declined, or E for electronic Review.

1. Open **Membership Manager, Groups Keeper – Smart Groups**
2. Find the group you created last year named: *“Review Contributions over 100”*
3. Click on group, then select *“Edit Group”* from tool bar above



Edit the first Criteria

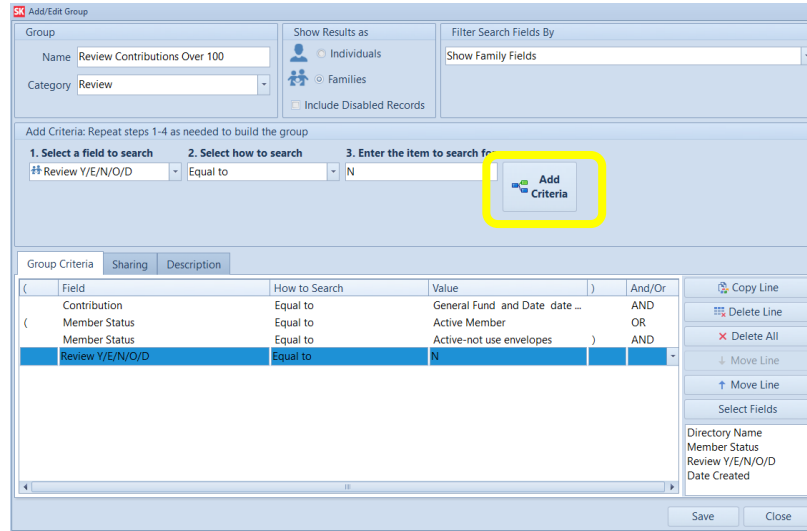
- a. Step 1 Click on first criteria *“Contribution Equal to General Fund”* (or offertory equivalent)
- b. Step 2 Edit the *“Contribution Date”* between with the last calendar year dates. example 1/1/2023 and 12/31/2023 as seen below
- c. Step 3 Total gift should remain *“Greater than \$99.99”*
- d. Step 4 Click **“Add criteria”** button on right



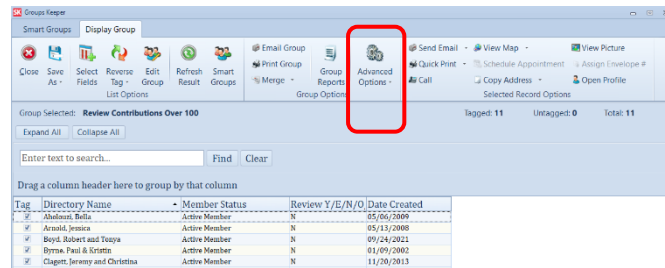
Member Status Criteria(s) – Should remain the same as previous year if no member statuses have been added or removed. (If necessary add the new member status to your criteria and insert a close parenthesis after last member status)

Next Criteria – This should be the same if created last year.

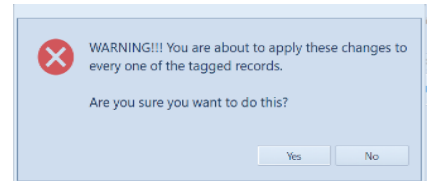
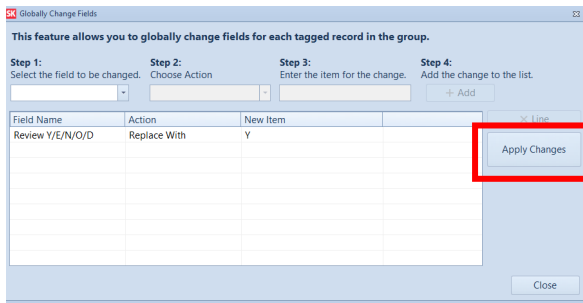
- Step 1 (Select a field to search): “Review Y/E/N/O/D”
- Step 2 (Select how to search the field): “Equal to”
- Step 3 (Enter the item to search for) **N**
- Step 4 Choose “and” between criteria and click “Add Criteria” button on right
- When complete criteria should look similar to the following:



- Click save. List will be populated from the data base. Review list for irregularities. All records should be registered members with contributions of \$100 or greater with a Review field containing **N**. All records on the list should be tagged.



- From the Group Display, click **Advanced Options>Globally Change Field:**
 - Step 1 (Select field to be changed): *Review Y/E/N/O/D*
 - Step 2 (Choose Action): Replace with
 - Step 3 (Enter the item for change): **Y**
 - Step 4 (Add the change): Click **Add**. Click **Apply Changes**
 - You will see receive a warning and be 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. Marking 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 are currently marked as a **N**. By contributing to the “St Louis Review” fund parishioners become eligible to receive the Review. The global change will make them a **Y**.

1. Open **Groups Keeper**, Smart Group
2. Find group created last year named: “*Review Fund Contributors*”
3. Click on group
4. Select “Edit group” from the tool bar above

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” 11/1/2023 and today. Total gift greater than \$1.00
- e. Click “Add Criteria” button on the right

Second Criteria

- a. Step 1 (Select a field to search): select “Review Y/E/N/O/D”
- b. Step 2 (Select how to search the field): select “Equal to”
- c. Step 3 (Enter the item to search for): enter “N”
- d. Click “Add Criteria” button on the right

5. Click save. List will be populated from the data base. List contains families with contributions to the *St. Louis Review* Fund since 11/1/2023 greater than \$1.00 with a Review status currently an **N**. All records on the list should be tagged.

Tag	Directory Name	Phone	Review Y/E/N/O/D	Member Status
<input checked="" type="checkbox"/>	Greiner, Dave & Lori	(314) 776-6788	N	Active Member
<input checked="" type="checkbox"/>	Jansen, Rob & Camilla	(314) 640-0059	N	Active Member
<input checked="" type="checkbox"/>	Jones-Wofford Family	(314) 495-9905	N	Active Member

6. 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**. Click **Apply Changes**.
 - e. You will see receive a warning and be 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**

Globally Change Fields

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

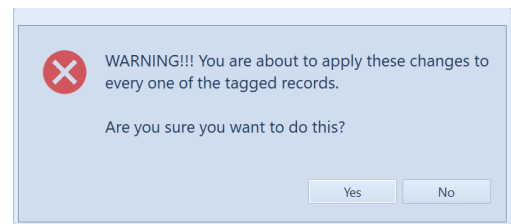
Step 1: Select the field to be changed. Step 2: Choose Action. Step 3: Enter the item for the change. Step 4: Add the change to the list.

Field Name | Action | New Item

Review Y/E/N/O/D	Replace With	Y

Apply Changes

Close

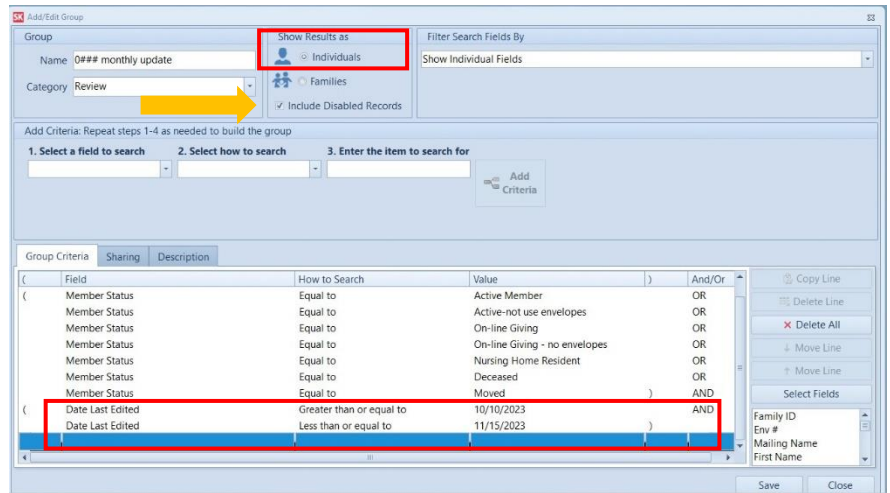


Generating the Annual/Monthly Update List

The monthly update report should have been created previously and should be used regularly to notify the St. Louis Review of any changes. Steps 1 and 2 above should be completed annually in February/March. **When steps 1 and 2 are complete, you will then run the previously created 0### Monthly Update Report, changing ONLY the dates in the last two criteria, save as an excel file and send to The St. Louis Review Office. This report is a list of those records that have changed in your database since your last submission, not a list of subscribers.**

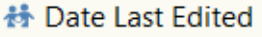
1. **Open Membership Manager, Groups Keeper, Smart Groups**
2. Select "0### monthly update" (Example 0 then 3 digit parish number 0777 monthly update). This is the group you created in the St. Louis Review in previous years. **DO NOT create a new group each year/month.** You should have one group that is just edited when you send in an update (This can be annually, monthly or quarterly depending on changes that need to be made).
3. Click "Edit Group" and edit the criteria according to instructions below.

The picture to the right is an example of an individual group previously created. Edit **only** the last **two criteria** listed in the red box. All other items remain the same.

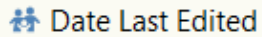


You will only need to edit the last two criteria pertaining to the date last edited.

First 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 annual/monthly report generation. This date will be the date you last ran the Review Monthly Update report plus one day. If you were creating the next annual/monthly update report using the sample above, you would use the date 11/16/2023
- Click "**Add Criteria**" button on right

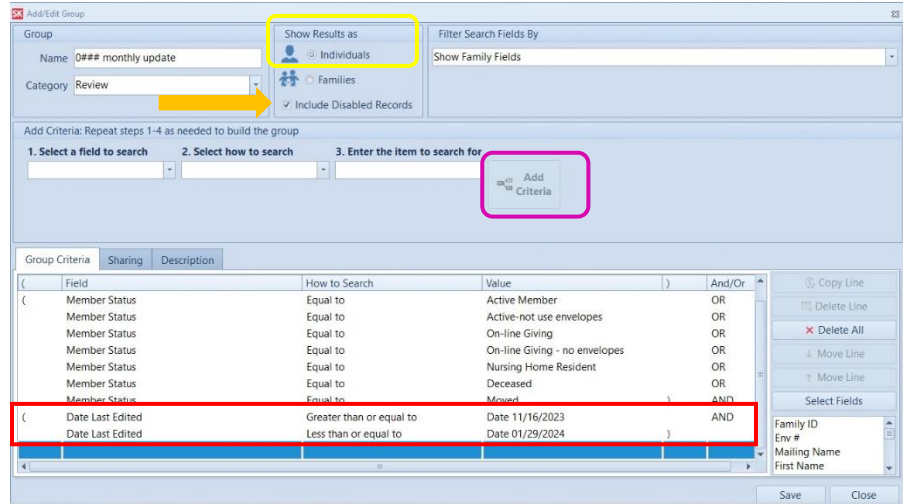
Second criteria to edit

- 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 1/29/2024.
- Click "**Add Criteria**" button on right

Below is the sample group with the above edits made

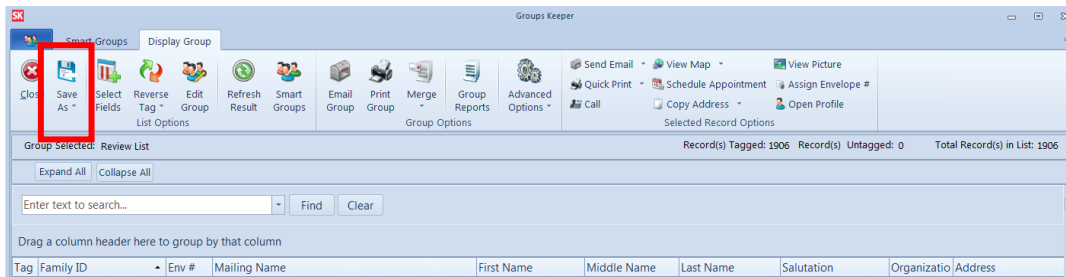
The example to the right is the new group created from the previous group above. This example was created to show what has changed in our database from 11/16/2023 to 1/29/2024.

Be sure the “Include Disabled Records” box is checked at the top!



4. Click Save. The list will now be generated for the dates 11/16/2023 to 1/29/2024.

Please be aware this list generated will only include those records that changed during the time frame requested. Some of these changes may have no relevance to your Review list. This is not a concern.



5. Select Save As. Choose Microsoft Excel Spreadsheet (File type Excel Spreadsheet .xls)
6. Save file in a folder or on desktop using the file name **0 then “your parish 3- digit number” monthly update example: 0777 monthly update.** Verify there are no blank Review fields and all records have an address
7. Email the saved file to subscriptions@stlouisreview.com with parish name and parish number in subject line. If you need assistance, please contact Stephen Kemp | 314.792.7507.

Addendum Instructions

Only use these instructions if you have not previously created the groups listed below:

**Review Contributions over 100”
“Review Fund Contributors”
“0### Monthly Update**

1. Directions for making those who have given over \$100 in the past year an “Y”

This group will include all Registered Members who have given over \$100 to the general Fund in the last calendar year. The Review field will be changed 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 step 5 and 6. All active families would be marked with a Y, or D for declined or E for electronic Review.

1. Open **Membership Manager, Groups Keeper**, Add Group
2. Enter a group name: “Review Contributions over 100”
3. Select Show “Families”
4. Show Fields For: **Show All Fields**
5. Add criteria to the group. Follow instructions below

First Criteria

- a. Step 1 (Select a field to search): “Contribution”
- b. Step 2 (Select how to search the field): “Equal to”
- c. Step 3 (Enter the item to search for) “General Fund” or “Offertory”
- d. Step 4 Contribution date between 1/1/2023 and 12/31/23
- e. Step 5 Total gift greater than \$99.99
- f. Step 6 Choose “and” between criteria and click “**Add Criteria**” button

Second Criteria

- a. Step 1 (Select a field to search): “Member Status” (Family)
- b. Step 2 (Select how to search field): “Equal to”
- c. Step 3 (Enter the item to search for) “Active Member”
- d. Step 4 Choose “or” between criteria and click “**Add Criteria**” button

Continue by adding active member statuses used by parish. (For example, On-Line Giving, On-line giving no envelopes, School Family etc.) Choose “or” between Member Statuses.

6. Place an open parenthesis before first active membership status and a closed parenthesis after last active membership status used.

Next Criteria

- a. Step 1 (Select a field to search): “Review Y/E/N/O/D”
- b. Step 2 (Select how to search the field): “Equal to”
- c. Step 3 (Enter the item to search for) **N**
- d. Step 4 Choose “and” between criteria and click “Add Criteria” button

7. Click save. List will be populated from the data base. Review list for irregularities. All records should be registered members with contributions of \$100 or greater. All records on the list should be tagged.

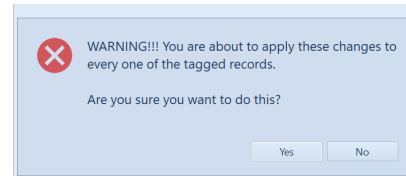
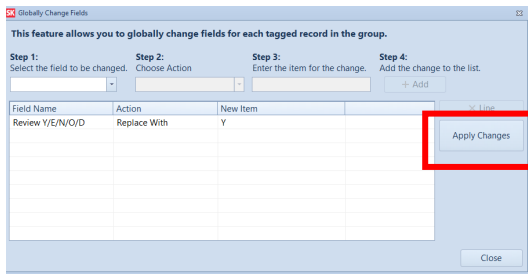
When complete criteria should look similar to the following:

The screenshot shows the 'Add/Edit Group' window. The 'Name' field is 'Review Contributions Over 100' and the 'Category' is 'Review'. The 'Show Records as' section has 'Individuals' selected. The 'Filter Search Fields By' dropdown is set to 'Show Contribution Fields'. The 'Add Criteria' section shows three criteria: 'Contribution' (Equal to, General Fund), 'Contribution Date' (Between, 01/01/2023 and 12/31/2023), and 'Total Gift' (Greater than, \$99.99). The 'Add Criteria' button is highlighted with a red box. Below this is a table of group criteria:

Field	How to Search	Value	And/Or
Contribution	Equal to	General Fund and date between 01/01/2023 and 12/31/2023	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	

At the bottom right, the 'Save' button is highlighted with a red box.

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**. Click **Apply Changes**,
 - e. You will see receive a warning and be 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. Marking those who have contributed to the *St. Louis Review* a “Y”

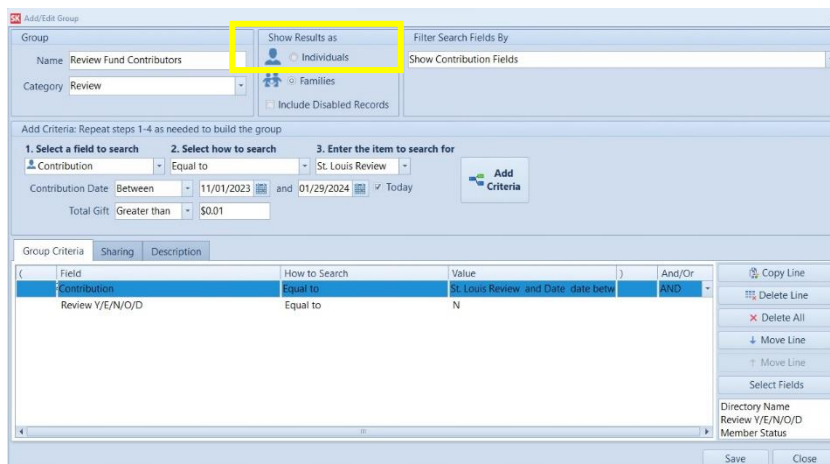
1. Open **Groups Keeper**, Add Group
2. Create a new Group Name
3. Enter a group name: “*Review Fund Contributors*”.
4. Select Show “Families”
5. Show Fields For: Show **All Fields**
6. Add your criteria to create the group

First Criteria

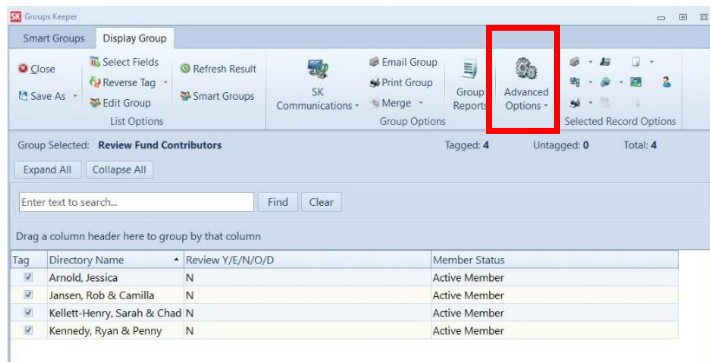
- a. Step 1 (Select a field to search): select “Contribution”
- b. Step 2 (Select how to search the field): select “Equal to”
- c. Step 3 (Enter the item to search for): select “*St. Louis Review*”
- d. Contribution date choose “between” 11/1/2023 and today. Total gift greater than \$1.00
- e. Click “Add Criteria”. Choose “and”

Second Criteria

- a. Step 1 (Select a field to search): select “Review Y/E/N/O/D”
- b. Step 2 (Select how to search the field): select “Equal to”
- c. Step 3 (Enter the item to search for): enter N
- d. Click “Add Criteria”

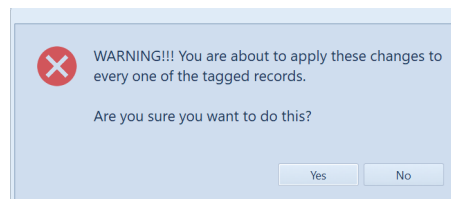
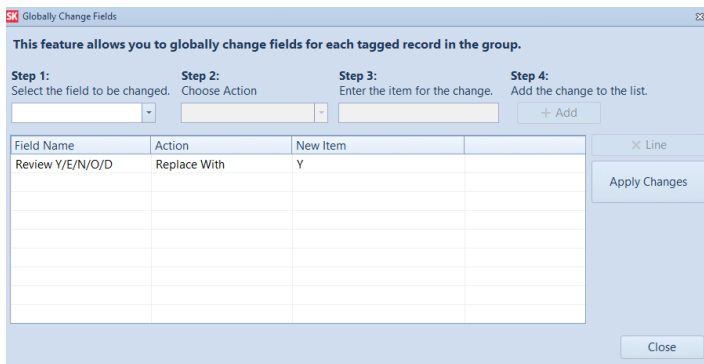


7. Click save. List will be populated from the data base. List contains families with contributions to the *St. Louis Review* Fund since 11/1/2023 greater than \$1.00. All records on the list should be tagged.



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**. Click **Apply Changes**.
- e. You will see receive a warning and be asked if you are sure you want to do this. Click yes. All those who have contributed will be made a **Y**.




3. Generating the St. Louis Review “0xxx monthly update” Report

1. **Open Membership Manager, Groups Keeper, Smart Groups**
2. Select “Review List” created in past or add a group.
3. Click “Edit Group” and edit group according to instructions below.
4. Rename the group **0** then **“your parish 3- digit number” monthly update** *example: 0777 monthly update*
5. Show Individuals
6. Show Fields for: **Show All Fields**
7. Create or make the following edits to this group you created previously.

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. Choose “and” between criteria and click **“Add Criteria”** button
- e. Click “Add Criteria” button

Second 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. Choose "or" between criteria and click "Add Criteria" button

*Continue to add all the **Active Member** statuses used by your parish to criteria above. Using "or" between statuses. No visitors, inactive, friends, etc.*


Next 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. Choose "or" between criteria and click "Add Criteria" button


Next Criteria

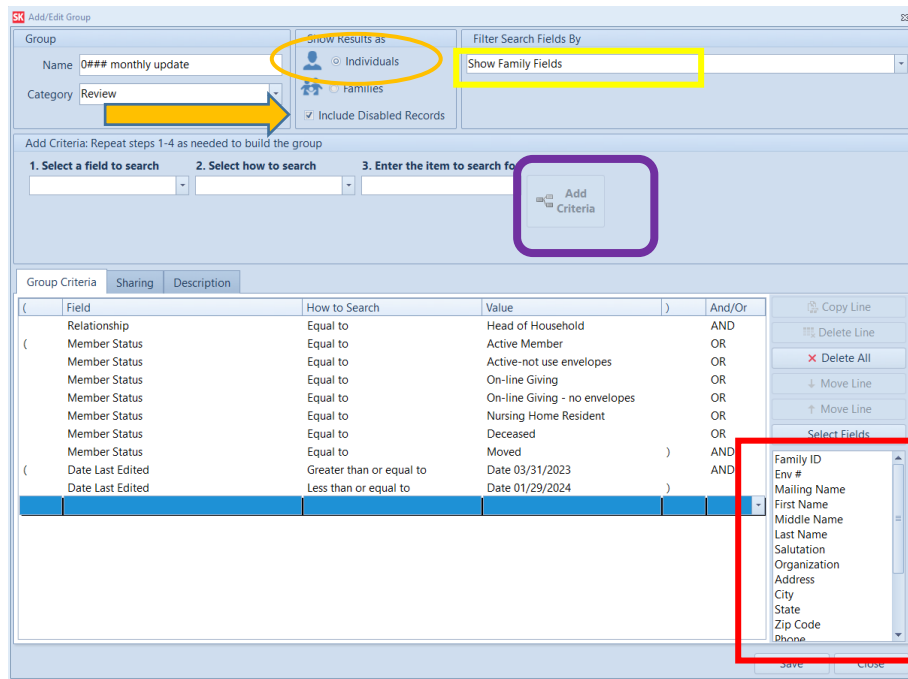
- a. Step 1 (Select a field to search): "Member Status" (Family)  Member Status
- b. Step 2 (Select how to search the field): "Equal to"
- c. Step 3 (Enter the item to search for) "Moved"
- d. Choose "and" between criteria and click "Add Criteria" button
- e. Place and open parenthesis before first active membership status and a closed parenthesis after moved status.

Next criteria

- e. Step 1 (Select a field to search): "Date last edited" (Family)  Date Last Edited
- f. Step 2 (Select how to search the field): "Greater than or equal to "
- g. Step 3 (Enter the item to search for) "03/31/23"
- h. Click "Add Criteria" button
- i. Choose "and" between criteria and click "Add Criteria"

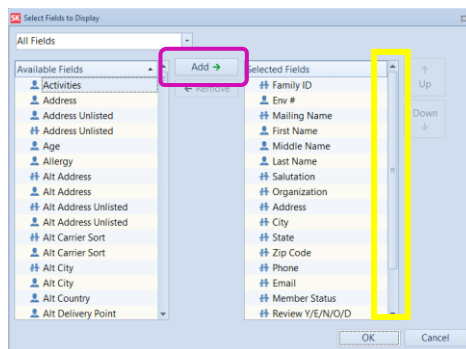
Next criteria



- 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
- d. Click "Add Criteria" button
- e. Place and open parenthesis before first "Date last edited" and a closed parenthesis after the current date.



8. Check Include Disabled Records. See orange arrow above.
9. Select the following fields in this order for display

Verify you have selected the correct fields in the correct order. **Scroll down to make sure all fields listed below are selected!**

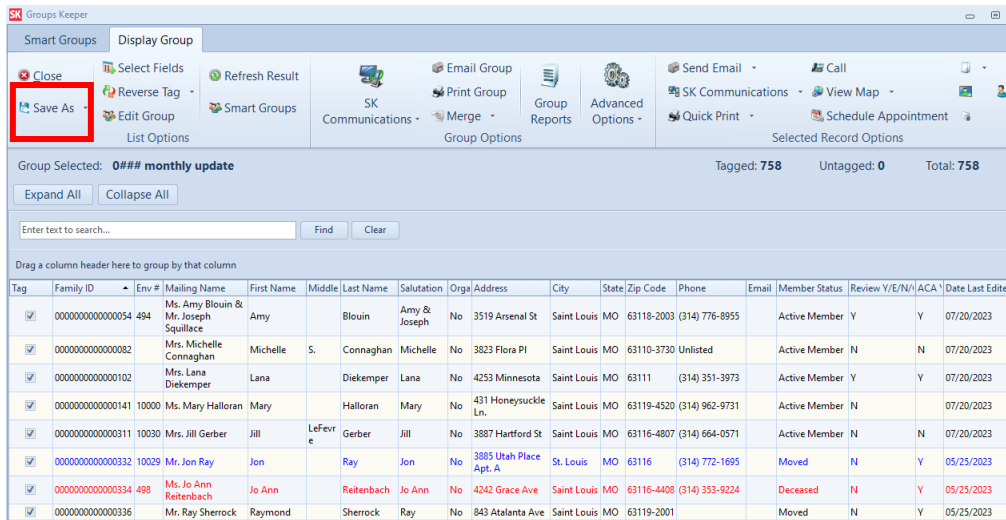


 Individual
  Family

- | | |
|---|---|
| a. Family ID (Family) | j. City (Family) |
| b.  Env # (individual) | k. State (Family) |
| c. Mailing Name (Family) | l. Zip Code (Family) |
| d.  First Name (Individual) | m. Phone (Family) |
| e.  Middle Name (Individual) | n. Email (Family) |
| f.  Last Name (Individual) | o. Member Status (Family) |
| g. Salutation (Family) | p. Review Y/E/N/O/D (Family) |
| h. Organization (Family) | q. ACA Y/N (Family) Field name must be ACA Y/N |
| i. Address (Family) | r. Date Last Edited (Family) |

- Click Save. *0### monthly update* list is generated. **Make sure that no Review fields are blank (must be a Y, E, N, O or D) and all records have an address.**

Please be aware this list will ONLY include those records who have changed during the time frame requested. This is not the list of those receiving the St. Louis Review. This report will only show the records that have changed since last year.



- Select Save As. Choose Microsoft Excel Spreadsheet (File type Excel Spreadsheet .xls)
- Save to a folder or on desktop using the file name *0 then "your parish 3- digit number" monthly update* **example: 0777 monthly update**. Verify all necessary fields are named correctly and are in the order listed above on your Excel file. See Step 9 above for field names and order.
- Email the *St. Louis Review* Monthly Update list created to subscriptions@stlouisreview.com with parish name and parish number in subject line. Please submit your report by Friday, March 8, 2024. If you need more time please contact Stephen Kempf | 314.792.7507.
- Questions about St. Louis Review subscriptions should be directed to subscriptions@stlouisreview.com or (314) 792-7507. **Questions about Servant Keeper should be directed to the one of the Parish Support team members below.**

Michele Fisher 314.792.7829 or michelefisher@archstl.org

Shelley Lang at 314.792.7072 or shelleylang@archstl.org.