# **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	Code Definition
<i>Review</i> Codes	
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 previoulsy 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

SK Groups Keeper	_					
Smart Groups Display Group						
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#### Edit the first Criteria

- a. Step 1 Click on first criteria "Contribution Equal to General Fund" (or offertory equivalent)
- 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

Group		Show Results as	Filter Search Fields By			
Name	Review Contributions Over 100	💄 🔘 Individuals	Show Contribution Fields			
Category	Review -	📸 💿 Families				
Add Criter	ria: Repeat steps 1-4 as needed to build th	e group				
1. Select Contribution	a <b>field to search</b> 2. Select how to ibution  • Equal to ution Date Between • 01/01/202 Total Gift Greater than • \$99.99 Iferial Sharing Description	search 3. Enter the item General Fund and 12/31/2023	esearch for day			
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Member Status Criteria(s) – Should remain the same as previous year if no member statuses have be 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.

- 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 on right
- e. When complete criteria should look similar to the following:

		Show Results as	Filter Search Fields By			
Review Contributio	ons Over 100	👤 💿 Individuals	Show Family Fields			
Review	•	Families     Include Disabled Records				
ia: Repeat steps 1-4	as needed to build th	he group				
a field to search	2. Select how to	search 3. Enter the item	to search for			
Y/E/N/O/D	✓ Equal to	▼ N	Add Criteria			
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ld		How to Search	Value	)	And/Or	Copy Line
ntribution		Equal to	General Fund and Date date		AND	E Delete Line
ember Status		Equal to	Active Member		OR	× Delete All
view Y/E/N/O/D		Equal to	Active-not use envelopes N	)	AND -	+ Move Line
						1 Move Line
						Select Fields
						Directory Name Member Status Review Y/E/N/O/D Date Created
	Review Contribution Review a: Repeat steps 1	Review Contributions Over 100 Review a: Repeat steps 1-4 as needed to build t field to search 2. Select how to V/E/N/O/D e ria Sharing Description Id mber Status smber Status	Review Contributions Over 100       Image: Contributions Over 100         Review       Image: Contributions Over 100         Review       Image: Contributions Over 100         Image: Contribution Over 100       Image: Contribution Over 100         field to search       2. Select how to search         are Repeat steps 1-4 as needed to build the group       Image: Contribution Over 100         field to search       2. Select how to search         are repeating to the contribution       Image: Contribution Over 100         Id       How to Search         td       How to Search         td       How to Search         td       Equal to         imber Status       Equal to         imber Status       Equal to         rew V/E/N/0/D       Equal to	Review Contributions Over 100       Individuals       Show Family Fields         Review       Individuals       Individuals       Show Family Fields         Review       Individuals       Individuals       Individuals         Individuals       Individuals       Individuals       Show Family Fields         Review       Individuals       Individuals       Individuals         Individuals       Equal to       Individuals       Individuals         Individuals       Equal to       General Fund and Date date _       Individuals         Imber Status       Equal to       Active not use envelopes       Individuals         Individuals       Equal to       N       Individuals       Individuals	Review Contributions Over 100       Individuals       Show Family Fields         Review <ul> <li>Families</li> <li>Include Disabled Records</li> </ul> Show Family Fields         a: Repeat steps 1-4 as needed to build the group <ul> <li>field to search</li> <li>2. Select how to search</li> <li>Betre the item to search for the group</li> <li>Field to search</li> <li>Criteria</li> </ul> eria       Sharing       Description         Id       How to Search       Value       )         id       How to Search       Value       )         mber Status       Equal to <ul> <li>Active Member</li> <li>mber Status</li> <li>Equal to</li> <li>Active Nenber</li> <li>)</li> <li>ew V/E/N/0/D</li> </ul> Equal to     N	Review Contributions Over 100       Individuals       Show Family Fields         Review <ul> <li>Field to search</li> <li>Second to build the group</li> <li>Field to search</li> <li>Second to search</li></ul>

 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.

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- 5. 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

his feature allows	you to g	Jobally change f	ields for each tagged record in	the gro	up.	
tep 1: elect the field to be c	hanged.	Step 2: Choose Action	Step 3: Enter the item for the o	change.	Step 4: Add the change f	o the list.
	w				+ Add	
ield Name	Acti	ion	New Item			× Line
Review Y/E/N/O/D	Rep	lace With	Y		[	Apply Changes



# 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

SK Add/Edit Group				23
Group	Show Results as	Filter Search Fields By		
Name Review Fund Contributors	👤 💿 Individuals	Show Contribution Fields		+
Category Review	👬 💿 Families			
cutegory month	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	arch 3. Enter the item to	o search for		
Contribution Figure Equal to	<ul> <li>St. Louis Review</li> </ul>	- Add		
Contribution Date Between - 11/01/2023	and 01/29/2024 🖬 🗹 Tod	ay Criteria		
Total Gift Greater than - \$0.01				
Group Criteria Sharing Description				
( Field	How to Search	Value )	And/Or	🟠 Copy Line
Contribution	Equal to	St. Louis Review and Date date betw	AND -	Delete Line
Review Y/E/N/O/D	Equal to	N		× Delete All
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				WOVE LINE
				↑ Move Line
				Select Fields
				Directory Name
	Ш		•	Review Y/E/N/O/D Member Status
				Save Close

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.

Smart Groups Display Group			
Close Save Select Reverse Edit As * Fields Tag * Group List Options	t Email Print Verge Group Croup Options	Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email     Image: Send Email       Image: Send Email     Image: Send Email     Image: Send Email <td></td>	
Group Selected: 2021 Review Fund Contributors		Record(s) Tagged: 3 Record(s) Untagged: 0	Total Record(s) in List: 3
Expand All Collapse All			
Enter text to search	Find Clear		
Drag a column header here to group by that column			
Tag Directory Name       Phone	Review Y/E/N/O/D	Member Status	
Greiner, Dave & Lori (314) 776-6788	N	Active Member	
Jansen, Rob & Camilla (314) 640-0059	N	Active Member	
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**

SK Globally Change Fields							٤
This feature allows you	u to g	lobally change fie	elds for e	ach tagged record in the g	group	•	
Step 1: Select the field to be char	nged.	Step 2: Choose Action		Step 3: Enter the item for the change	<b>s</b> е. А	tep 4: dd the change	e to the list.
	*					+ Add	
Field Name	Acti	on	New Ite	em			× Line
Review Y/E/N/O/D	Rep	lace With	Y				Apply Changes
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# **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

- 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.

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

## First criteria to edit

- a. Step 1 (Select a field to search): "Date last edited" (Family) Are Last Edited
- b. Step 2 (Select how to search the field): "Greater than or equal to "
- c. 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
- d. Click "Add Criteria" button on right

## Second criteria to edit

- 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.** The sample below was created on 1/29/2024.
- d. 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!

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N	ame 0### monthly update	👤 💿 Individuals Sho	w Family Fields		
ateg	gory Review	Families Include Disabled Records			
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. Se	lect a field to search 2. Select ho	w to search 3. Enter the item to sear	ch for		
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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.

SK						Groups Keeper										-	۰	83	
<u>.</u>	Smart	Groups	Displa	ay Group															~
(X) Clos	Save As *	Select Fields	Reverse Tag * List Opti	Edit Group ons	(C) Refresh Result	Smart Groups	Email Group	Print Group	Merge Group O	Group Reports ptions	Advanced Options *	🥩 Send Email 🔌 😼 Quick Print 🕚	<ul> <li>P View Map</li> <li>Schedule Ap</li> <li>Copy Addre</li> <li>Selected Rec</li> </ul>	• opointment ess • cord Option	View Picture Assign Envelope # Open Profile				
Gro	up Selected	d: Review	List										Record(	s) Tagged: :	1906 Record(s) Untage	ged: 0 Tot	al Record(s) in Li:	st: 190	6
Ent	er text to s	search	have to	aroup by	that calu	▼ Fir	nd Cle	ear											
Tag	Family ID	n neader	nere to e	nv #	Mailing Na	ame				First	t Name	Middle Na	me Last Na	me	Salutation	Organizatio	Address		-

- 5. Select Save As. Choose Microsoft Excel Spreadsheet (File type Excel Spreadsheet .xls )
- 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 <u>subscriptions@stlouisreview.com</u> with parish name and parish number in subject line. If you need assistance, please contact <u>Stephen Kemp</u> | 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:

Add/Edit Group					
Group	Chow Paculte as	Filter Search Fields By			
Name Review Contributions Over 100	👤 🔿 Individuals				
Category Review	for the second sec	ls			
Add Criteria: Repeat steps 1-4 as needed to build	the group				
1. Select a field to search     2. Select how to       ▲ Contribution     - Equal to       Contribution Date     Between       Total Gift     Greater than       Contribution     - \$99.99	3. Enter the ite General Fund 23 III and 12/31/2023 III	Today	]		
Group Criteria Sharing Description					
( Field	How to Search	Value	)	And/Or	😭 Copy Line
Contribution	How to Search Equal to	Value General Fund and date betwee	) en O	And/Or AND *	Copy Line
(   Field Contribution ( Member Status	How to Search Equal to Equal to	Value General Fund and date betwee Active Member	) en O	And/Or AND * OR	Copy Line
( ) Field Contribution ( Member Status Member Status Beview VE(N)(Q/D)	How to Search Equal to Equal to Equal to Equal to	Value General Fund and date betwee Active Member Active-not use envelopes N	) en 0	And/Or AND * OR AND	Copy Line
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( Field Contribution ( Member Status Member Status Review V/E/N/O/D	How to Search Equal to Equal to Equal to Equal to	Value General Fund and date betwee Active Member Active-not use envelopes N	) en 0 )	And/Or AND OR AND	G Copy Line Delete Line X Delete All ↓ Move Line ↑ Move Line
( Field Contribution ( Member Status Member Status Review V/E/N/O/D	How to Search Equal to Equal to Equal to Equal to	Value General Fund and date between Active Member Active-not use envelopes N	) en 0 )	And/Or AND OR AND	Copy Line Copy Line
( Field Contribution ( Member Status Member Status Review V/E/N/O/D	How to Search Equal to Equal to Equal to Equal to	Value General Fund and date between Active Member Active-not use envelopes N	) en 0	And/Or AND OR AND	Copy Line Copy
( Field     Contribution     ( Member Status     Member Status     Review V/E/N/O/D	How to Search Equal to Equal to Equal to Equal to	Value General Fund and date between Active Member Active-not use envelopes N	) en 0 )	And/Or AND OR AND AND	Copy Line

- 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.

					3		
itep 1: ielect the field to be cl	hanged.	Step 2: Choose Action		Step 3: Enter the item for the o	hange.	Step 4: Add the change	e to the list.
	Ŧ					+ Add	
Field Name	Acti	on	New It	em		_	× Line
Review Y/E/N/O/D	Rep	lace With	Y				Apply Changes



## 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"

up	Show Results as	Filter Search Fields By							
Name Review Fund Contributors	👤 🔿 Individuals	Show Contribution Fields							
tegory Review	Include Disabled Records								
d Criteria: Repeat steps 1-4 as needed to b	uild the group								
Select a field to search 2. Select he	ow to search 3. Enter the item	to search for							
Contribution - Equal to	<ul> <li>St. Louis Review</li> </ul>	- Add							
ontribution Date Between - 11/0	1/2023 📷 and 01/29/2024 📖 🗹 Ti	oday Criteria							
for a for the second se									
Total Gift Greater than - \$0.0									
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total Gitt Greater than - \$200 sup Criteria Sharing Description Field Commouton Review V/E/N/O/D	How to Search Equal to Equal to	Value St. Louis Review and Date dat N	) e betw	And/Or AND		Copy Line Delete Line Delete All Move Line Move Line lect Fields Name CR/VOD			

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.

Sma	art Groups Display Group							
© ⊆i të Sa	ose The Select Fields The Reverse Tag - The Select Fields The Sele	◎ Refresh Result ኞ Smart Groups	SK Communications -	<ul> <li>Email Group</li> <li>Print Group</li> <li>Merge</li> <li>Group Options</li> </ul>	Group Reports	Advanced Options +	● - 月 間 - 身 動 - 問 Selected F	Record Options
	And the second							
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Exp Ente Drag 2 2 2 2	and All Collapse All er text to search a column header here to gr Directory Name Arnold, Jessica Jansen, Rob & Camilla Kellett-Henry, Sarah & Ch	oup by that column  Review Y/E/N/O,  N  N  ad N	Find Clear	Ac Ac Ac	ember Stat tive Memb tive Memb	us ier ier		

- 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**.

SK Globally Change Fields				23		
Fhis feature allows you to globally change fields for each tagged record in the group.						
Step 1: Select the field to be char	Step 2: Iged. Choose Action	Step 3: Enter the item for the change	Step 4: Add the chang	e to the list.		
	•		+ Add			
Field Name	Action	New Item		× Line		
Review Y/E/N/O/D	Replace With	Y		Apply Changes		
				Close		

## 3. Generating the St. Louis Review "Oxxx 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) 2 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) Homber 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.

Add/Edit Group				23
Group	Show Results as	Filter Search Fields By		
Name 0### monthly update	Individuals	Show Family Fields		*
Category Review	Families     Include Disabled Records			
Add Criteria: Repeat steps 1-4 as neede	d to build the group			
1. Select a field to search 2. Se	lect how to search 3. Enter the item 1	a search fo		
Group Criteria Sharing Description	n			
( Field	How to Search	Value	) And/Or	Copy Line
Relationship	Equal to	Head of Household	AND	III Delete Line
( Member Status	Equal to	Active member	OR	X Delete All
Member Status	Equal to	Active-not use envelopes	OR	- Delete / III
Member Status	Equal to	On-line Giving	OR	↓ Move Line
Member Status	Equal to	Nursing Home Resident	OR	↑ Move Line
Member Status	Equal to	Deceased	OR	Select Fields
Member Status	Equal to	Moved	) AND	
( Date Last Edited	Greater than or equal to	Date 03/31/2023	AND	Family ID
Date Last Edited	Less than or equal to	Date 01/29/2024	)	Mailing Name
				First Name Middle Name Last Name Salutation Organization Address City State Zip Code Phone

- 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!

All Fields	-			
Available Fields	Add →	Selected Fields	-	
Activities	Remove	🚽 👬 Family ID		Up
2 Address		. Env #		
Address Unlisted		👬 Mailing Name		Down
🖶 Address Unlisted		First Name		
👤 Age		Middle Name		
👤 Allergy		🚨 Last Name		
🖶 Alt Address		# Salutation	-	
Alt Address		# Organization		
👫 Alt Address Unlisted		# Address		
Alt Address Unlisted		# City		
🖶 Alt Carrier Sort		# State		
Alt Carrier Sort		👫 Zip Code		
🖶 Alt City		# Phone		
👤 Alt City		# Email		
Alt Country		# Member Status		
Alt Delivery Point	Ŧ	Review Y/E/N/O/D	-	



Family

- a. Family ID (Family)
- b. 👤 Env # (individual)
- c. Mailing Name (Family)
- d. 👤 First Name (Individual)
- e. 👤 Middle Name (Individual)
- f. **L**ast Name (Individual)
- g. Salutation (Family)
- h. Organization (Family)
- i. Address (Family)

- j. City (Family)
- k. State (Family)
- I. Zip Code (Family)
- m. Phone (Family)
- n. Email (Family)
- o. Member Status (Family)p. Review Y/E/N/O/D (Family)
- q. ACA Y/N (Family) Field name must be ACA Y/N
- r. Date Last Edited (Family)

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10. 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.

SK Grou	ips Keeper																			j
Sma	art Groups	Disp	olay (	Group																
Close Select Fields Reverse Tag - Save As - List Options Select Fields Refresh Result Select Fields Refresh Result Select Fields Select Fields			Cor	SK mmunicatio	ons - 🗐	Ema Print Men Grou	t Group ge • Rep gp Options	oup A ports C	dvan Optio	ced ns •	Send Email SK Commur Quick Print	icatic	l Call ons → Ձ Viev Selected Reco	v Map 🔹 edule Appoir rd Options	ntmer	1) - 11 3	2			
Grou Exp	Group Selected: 0### monthly update Tagged: 758 Untagged: 0 Total: 758 Expand All Collapse All																			
Enter Drag a	text to search column head	 er here to	o grou	p by that column		Find	Clear													
Tag	Family ID	<b>▲</b> [	Env #	Mailing Name	First Name	Middle	Last Name	Salutation	Orga	Address	City	State	Zip Code	Phone	Email	Member Status	Review Y/E/N/	ACA	Date Last Edi	ited
V	000000000	000054 4	494	Ms. Amy Blouin & Mr. Joseph Squillace	Amy		Blouin	Amy & Joseph	No	3519 Arsenal St	Saint Louis	мо	63118-2003	(314) 776-8955		Active Member	γ	Y	07/20/2023	
V	000000000	000082		Mrs. Michelle Connaghan	Michelle	s.	Connaghan	Michelle	No	3823 Flora Pl	Saint Louis	мо	63110-3730	Unlisted		Active Member	N	N	07/20/2023	
V	000000000	000102		Mrs. Lana Diekemper	Lana		Diekemper	Lana	No	4253 Minnesota	Saint Louis	мо	63111	(314) 351-3973		Active Member	Y	Y	07/20/2023	
V	000000000	000141 1	10000	Ms. Mary Halloran	Mary		Halloran	Mary	No	431 Honeysuckle Ln.	Saint Louis	мо	63119-4520	(314) 962-9731		Active Member	N		07/20/2023	
V	000000000	000311 1	10030	Mrs. Jill Gerber	Jill	LeFevr e	Gerber	Jill	No	3887 Hartford St	Saint Louis	мо	63116-4807	(314) 664-0571		Active Member	N	N	07/20/2023	
V	000000000	000332 1	10029	Mr. Jon Ray	Jon		Ray	Jon	No	3885 Utah Place Apt. A	St. Louis	мо	63116	(314) 772-1695		Moved	N	Y	05/25/2023	
V	000000000	000334 4	498	Ms. Jo Ann Reitenbach	Jo Ann		Reitenbach	Jo Ann	No	4242 Grace Ave	Saint Louis	мо	63116-4408	(314) 353-9224		Deceased	N	Y	05/25/2023	
V	000000000	000336		Mr. Ray Sherrock	Raymond		Sherrock	Ray	No	843 Atalanta Ave	Saint Louis	MO	63119-2001			Moved	N	γ	05/25/2023	

- 11. Select Save As. Choose Microsoft Excel Spreadsheet (File type Excel Spreadsheet .xls )
- 12. 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.
- 13. Email the *St. Louis Review* Monthly Update list created to <u>subscriptions@stlouisreview.com</u> 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 <u>Stephen Kempf</u> | 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 <u>michelefisher@archstl.org</u> Shelley Lang at 314.792.7072 or <u>shelleylang@archstl.org</u>.