Generating Monthly Update Report

(Complete monthly/quarterly reports April-February)

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 I 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 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.

Generating the Monthly Update List

1. Open Membership Manager, Groups Keeper, Smart Groups

- Select "OXXX monthly update" (Example 0777 monthly update). This will be the group you
 previously created for the St. Louis Review. You DO NOT need to create a new group each month.
 You will need only one group that is edited every time you send in an update (This can be monthly
 or quarterly depending on changes that need to be made)
- 3. Click "Edit Group" and edit group according to instructions below.

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The picture to the right is an example group previously created. Edit only the last two criteria listed in the red box.	Add Criteria Repeat organ 1-4 as needed to build the 1. Select a field to search 2. Select have to a	earch 3. Enter the Name	to search for						
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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) 🛛 👫 Date 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 monthly report generation. This will be the date you last ran the Review Monthly Update report. If you were creating the next monthly update report using the sample above, you would use the date 1/01/2023.
- d. Click "Add Criteria" button

Second 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): "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 1/27/2023.
- d. Click "Add Criteria" button

Make sure the "Include Disabled Records" Box is checked (see orange arrow)

Below is the sample group with the above edits made.

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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 1/1/2023 to 1/27/2023. 4. Click Save. The list will now be generated for the dates 1/1/2023 to 1/27/2023.

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×	738357	/562163810	3 10041	Mr. and Mrs. Michael and Kels Lang	ey Michael	Timothy	Lang	Michael and Keisey	No	507 Wiggens Feny	Chesterfield	мо	63141	314123456 789		Active not use envelopes	¥	Y	01/19/2023
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Please be aware this list will only include those records that changed during the time frame generated. Please check your report to make sure those families that are deceased are marked "N" and those families that have moved are marked "O". Some of these changes on this report may have no relevance to your Review list. This is not a concern.

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- 5. Select Save As. Choose Microsoft Excel Spreadsheet (File type Excel Spreadsheet .xls)
- Save to a file 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.
- Email the saved file to <u>subscriptions@stlouisreview.com</u> with parish name and parish number in subject line. If you need assistance with subscriptions please contact <u>Stephen Kempf</u> 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>.