

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 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
2. 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.

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


Field	How to Search	Value	AND/OR
Relationship	Equal to	Head of Household	AND
Member Status	Equal to	Active Member	OR
Member Status	Equal to	Active-not use envelopes	OR
Member Status	Equal to	On-line GIVING	OR
Member Status	Equal to	On-line GIVING - no envelopes	OR
Member Status	Equal to	Nursing Home Resident	OR
Member Status	Equal to	Deceased	OR
Member Status	Equal to	Moved	AND
Date Last Edited	Greater than or equal to	11/02/2022	AND
Date Last Edited	Less than or equal to	12/31/2022	

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)  Date Last Edited
- 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 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.
- Click "Add Criteria" button

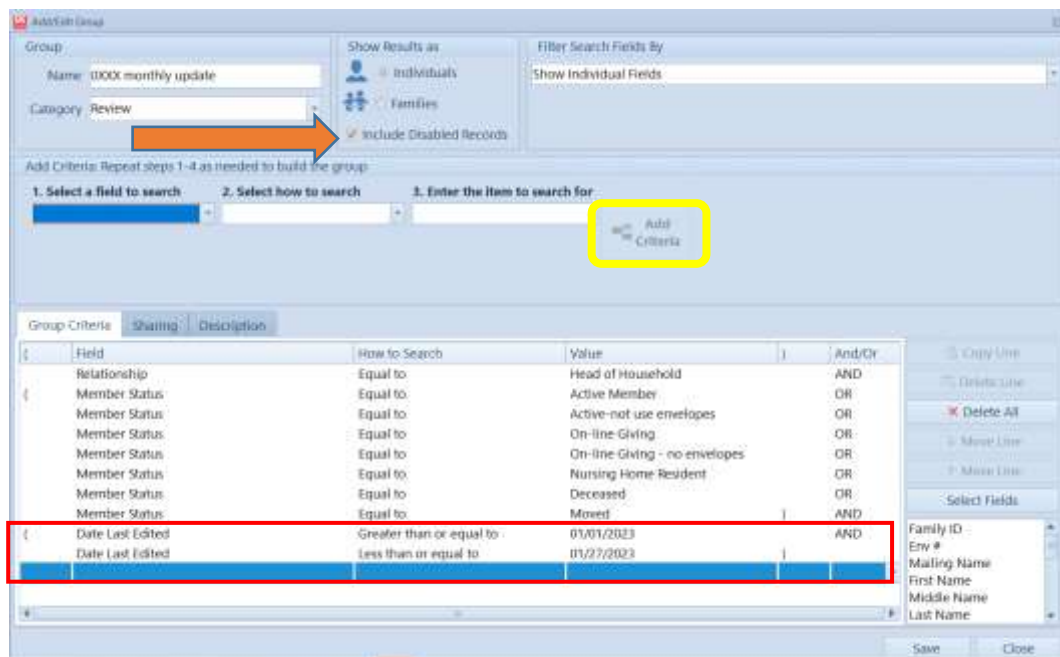
Second criteria to edit

- Step 1 (Select a field to search): "Date last edited" (Family)  Date Last Edited
- 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 1/27/2023.
- 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.

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.



Field	How to Search	Value	And/Or
Relationship	Equal to	Head of Household	AND
Member Status	Equal to	Active Member	OR
Member Status	Equal to	Active-not use envelopes	OR
Member Status	Equal to	On-line Giving	OR
Member Status	Equal to	On-line Giving - no envelopes	OR
Member Status	Equal to	Nursing Home Resident	OR
Member Status	Equal to	Deceased	OR
Member Status	Equal to	Moved	AND
Date Last Edited	Greater than or equal to	01/01/2023	AND
Date Last Edited	Less than or equal to	01/27/2023	

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

Tag	Family ID	Env #	Mailing Name	First Name	Middle	Last Name	Salutation	Org Address	City	Stat	Zip Code	Phone	Email	Member Sta	Review	ACA	Date Last Edited
W	7382034134180191	10033	Jack and Jackie Frost	Jack		Frost	Jack and Jackie	6767 Icecicle way	O'Fallon	MO	63366	[314] 777-7777		Active Member	Y	Y	01/19/2023
W	7382214062768402	10036	Mr. and Mrs. Monday and Lady Lourdes	Monday		Lourdes	Monday and Lady	No 9870 Test Street	Saint Louis	MO	63119	[323] 456-7890		Active Member	Y	Y	01/19/2023
W	7382235698652403	10037	Mr. and Mrs. Harold and Helen Bloss	Harold	J.	Bloss	Harold and Helen	No 123 Anywhere St.	St. Louis	MO	63136	[456] 789-1010		Active Member	Y	Y	01/12/2023
W	7382324981056903		Mr. and Mrs. King and Queen France	King	Of	France	King and Queen	No 123 Old Cathedral Way	Saint Louis	MO	63119			Active Member	Y	Y	01/19/2023
W	7382943443850102	10038	Mr. and Mrs. Ed and Kathryn Ruchalski	Ed	Il	Ruchalski	Ed and Kathryn	No 789 Water Way	Saint Louis	MO	63119	[123] 456-7890		Active Member	Y	Y	01/19/2023
W	7383575621638103	10041	Mr. and Mrs. Michael and Kelsey Lang	Michael	Timothy	Lang	Michael and Kelsey	No 507 Wiggins Ferry	Chesterfield	MO	63141	314123456789		Active not use envelopes	Y	Y	01/19/2023
W	7383783260401602	10042	Mr. and Mrs. Jane and Joe Sacred	Jane	Marie	Sacred	Jane and Joe	No 456 Heart Way	Saint Louis	MO	63119			Active Member	N	Y	01/19/2023
W	7385044871742102		Mr. Scott Cabin	Scott	Santa	Cabin	Scott	No 123 Reindeer Way	Plumasant	MO	63031			Deceased	Y	Y	01/27/2023

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.



5. Select Save As. Choose Microsoft Excel Spreadsheet (File type Excel Spreadsheet .xls)
6. 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.
1. Email the saved file to subscriptions@stlouisreview.com with parish name and parish number in subject line. If you need assistance with subscriptions please contact Stephen Kempf 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.