All Pilgrims Christian Church

Servant Keeper Member Database

Basic Operating Procedures

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Introduction

Servant Keeper is a church database program that consists of three modules:

- **Member Pro** is used to organize member information and groups.
- **Contribution Pro** is used to track financial contributions and other income.
- **Admin Pro** is used to backup and restore files, and update user information.

Program Startup

Servant Keeper's three modules are located in the same folder on the **Start** menu. You can open **Member Pro** and **Contribution Pro** at the same time and switch back and forth between them, but they both must be closed before opening **Admin Pro**.

To open a Servant Keeper module

1. From the **Start** menu, click **Servant Keeper** then **All Pilgrims**.
2. Click the module you would like to open (**Member Pro, Contribution Pro** or **Admin Pro**).
3. Enter your **User ID** and **Password** in the spaces provided.

To switch between Member Pro and Contribution Pro

- From the **Member Pro Main List**, click **Contribution** in the bottom right of the screen.

or

- From the **Contribution Entry** window**,** click **Membership** in the bottom right of the screen.

NOTE: **Contribution Pro** requires that you set the date before you can begin using its features. See Entering Contributions on Page 10 for more information.

Searching the Member Database

Family and individual information is stored in **Member Pro** and is listed in alphabetical order, by the family's last name. Each family has a family profile and each individual in a family has an individual profile.

The **Member Pro Main List** displays family profiles on the left in the Families window. When you click on a family name, information about individuals in that family will appear in the Individuals window on the right. Information can be changed or added to using these windows in combination with the Function Icons at the top of the screen (see Figure 1).

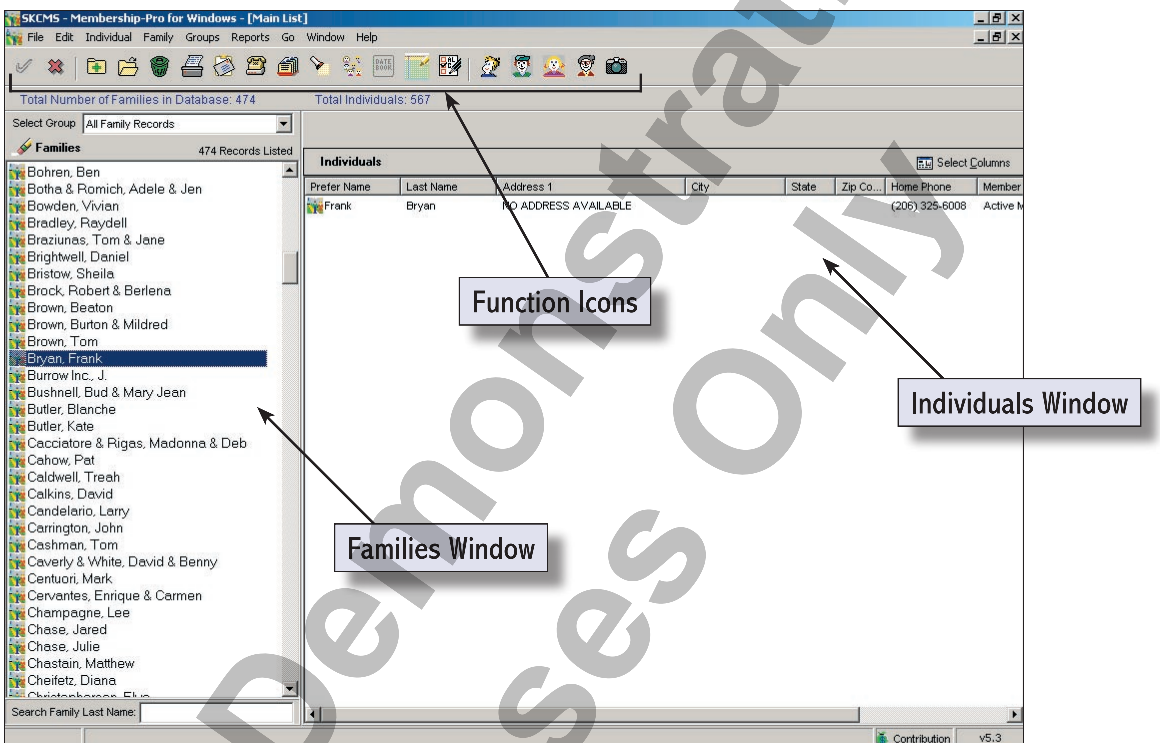


Figure 1. Member Pro Main List

To search for someone by their last name

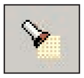
1. If the **Member Pro Main List** is not visible, click 

2. In the **Search Family Last Name** box, enter the first few letters of the last name.

The list of names in the families window will scroll to reflect the letters you typed, listing names starting with those letters.

If you don't know the last name of the person you are looking for, you can search for them another way.

To perform a general search

1. Click 
2. Select the search criteria from the **Search in** drop-down menu.
3. Enter the person's known data in the **Search for** box.
4. Click **Find Now**.

To view Family Profile information

- Double-click the family name in the Families window. This will bring you to the **Family Profile** window (see Figure 2).

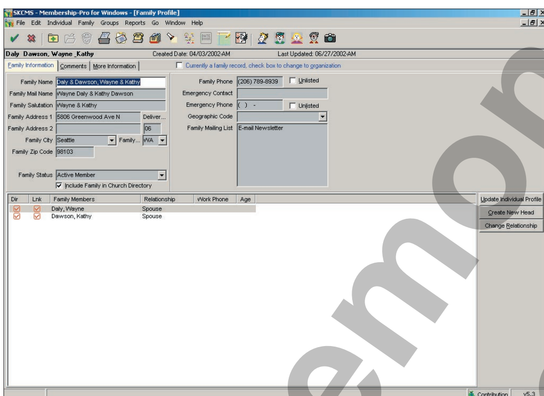


Figure 2. Family Profile Window

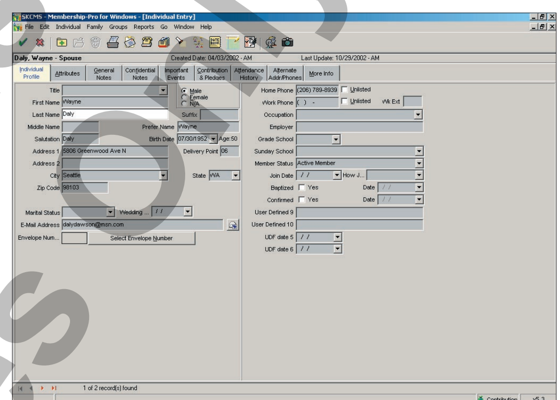


Figure 3. Individual Profile Window

To view Individual Profile information

1. Click the family name in the **Families** window.
2. Double-click the individual's name in the Individuals window. This will bring you to the **Individual Profile** window (see Figure 3).

Creating New Records

With Servant Keeper, you can create individual and family records. You can add specific individuals such as sons and daughters, as well as creating new relationships such as partner or roommate.

To create a new family record

1. Open **Member Pro**.
2. Click or on or on the **Family** menu, click **Create Family Profile**.
3. Complete all desired boxes and tabs for this family member.
4. Click This will bring you to the **Family Profile** window.
5. Complete all desired information for this family.
6. Click to save the entry.

To create a new individual record in an existing family

1. Open **Member Pro**.
2. In the **Families** window, click the family name you want to add an individual to.
3. Click one of the following to add an individual:

Add Spouse **Add Son** **Add Daughter** **Add Other** *

This will bring you to the **Individual Profile** window.

4. Complete all desired boxes and tabs for this family member.
5. Click This will bring you to the **Family Profile** window.

Repeat steps 3 – 5 for any additional individuals.

6. When there are no more individuals to add, click from the **Family Profile** window.

* NOTE: Clicking **Add Other** requires that you select the individual's relationship. See the following section for further details on specifying relationships.

Relationships

By default, Servant Keeper designates the first family member as the Head of Household. You may want to change this relationship say for instance, if the family consists of two roommates, neither of which is the head of the household.

To change an individuals relationship

1. From the **Family Profile** window, click the individual you want to change.
2. Click **Change Relationship**. The **Relationship** window will appear (see Figure 4).
3. Choose the appropriate relationship.
4. Click **OK**.

Figure 4. Relationship Window

If the appropriate relationship is not listed in the **Relationship** window you can create a new one.

To create a new relationship

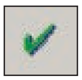
Follow steps 1 and 2 above, then

3. Click **Add**.
4. Enter the new relationship name in the space provided.
5. Click **OK**.

Editing Records

Once you have created a family or individual entry you may need to update existing information, add additional information, or delete the entry entirely.

To update or add family information

1. From the **Member Pro Main List**, double-click the family you want to update.
2. Update or add information where needed.
3. Click 

A confirmation box will appear asking if you want to copy the changes to all members of the family.

- If you do not want to copy the changes to everyone, click **No** to finish.

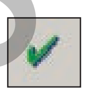
or

a. Click **Yes**. A confirmation window will appear.

b. From the list of family members, select the individuals to whom you want to copy the changes.

c. Click **OK**.

To update or add individual information

1. From the **Main List** window, double-click the individual you want to update.
2. Update or add information where needed.
3. Click 

To delete a family or individual

1. From the **Member Pro Main List**, click the family individual you want to delete.
2. Click 
3. Click **Yes** to confirm delete.

Groups

Groups can be used to sort records with common characteristics. For example, you can create a group for all the active members in the database or a group for all the people with a certain ZIP code. Using this information, you can create a number of predefined reports including mailing labels (see following section **Creating and Printing Reports**).

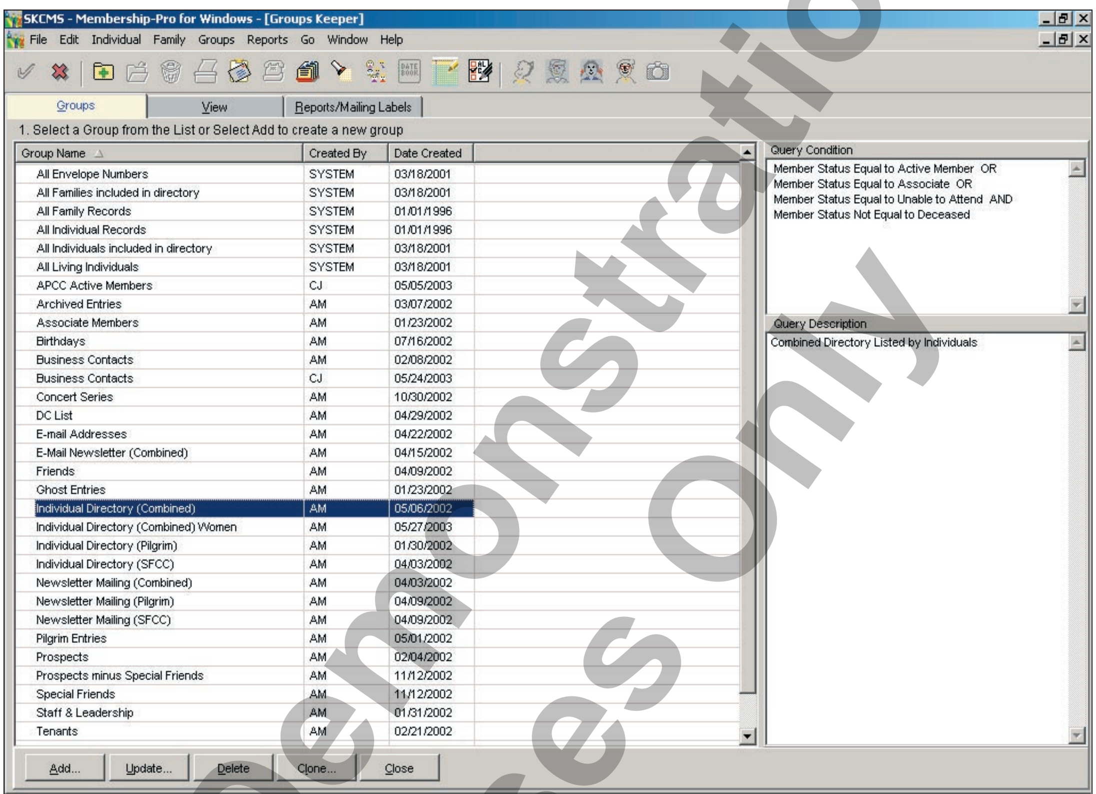


Figure 5. Groups Keeper Window

To create a group

1. Click  This will bring you to the **Groups Keeper** window (see Figure 5).

2. Click **Add**. This will bring you to the **Create/Modify Groups** window (see Figure 6).

continued on next page...

3. Select whether the group will reference family or individual records.

4. Select **Category** from the pull-down menu.

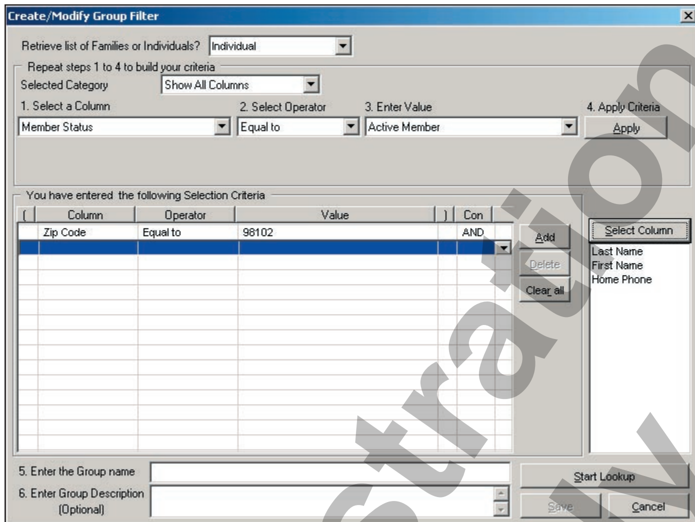


Figure 6. Create/Modify Groups

The following steps refer to the information stored in family or individual records.

5. **Select Column** from the pull-down menu (for example, **ZIP Code**).

6. **Select Operator** from the pull-down menu (for example, **Equal to**).

7. **Enter Value** in the space provided (for example, **98102**)

8. Click **Apply**.

Repeat steps 5 -8 for each additional column you want to reference for this group.

9. Enter the name of the group (for example, 98102 ZIP Codes).

10. Enter the group description if desired.

11. Click **Save**.

To view the results of a group

1. From the **Groups Keeper** window, click the **Groups** tab.

2. From the list on the left, double-click the name of the group you would like to view.

Member Pro Reports

Member Pro can create mailing labels, directories, birthday lists, and many other reports. Reports that show contribution information can only be printed from **Contribution Pro**.

To create mailing labels

1. From the **Groups Keeper** window, click the group from which you want to make labels.
2. Click the **Reports/Mailing Labels** tab.
3. Double-click **Mailing Labels and Envelopes**.
4. Click the desired labels or envelope type.
5. Enter any additional criteria on the right.
6. Click **Print**.

To create other reports

Follow steps 1 and 2 above, then

3. Double-click the desired report category.
4. Click the desired report type.
5. Enter any additional criteria on the right.
6. Click **Print**.

Depending on how Servant Keeper's preferences are set, your report may first display on screen instead of printing directly.

To print reports that first display on screen

1. Create the report you would like to print.
2. Click 
3. Set desired printer options.
4. Click **Print**.

Entering Contributions

Contributions and funds received are recorded using **Contribution Pro**. You can record parishioner offerings, rental payments, and any other payments that come into the church. Before recording contributions you must set a date.

To set the date

1. Open **Contribution Pro** (see Program Startup, page 1).
2. A dialog box will appear. Choose one of the following options.
   - Click **No** to set today's date as the date of the contribution(s).
   - Click **Yes**, then select the desired date from the calendar window.

   This will bring you to the **Contribution Entry** window (see Figure 7).

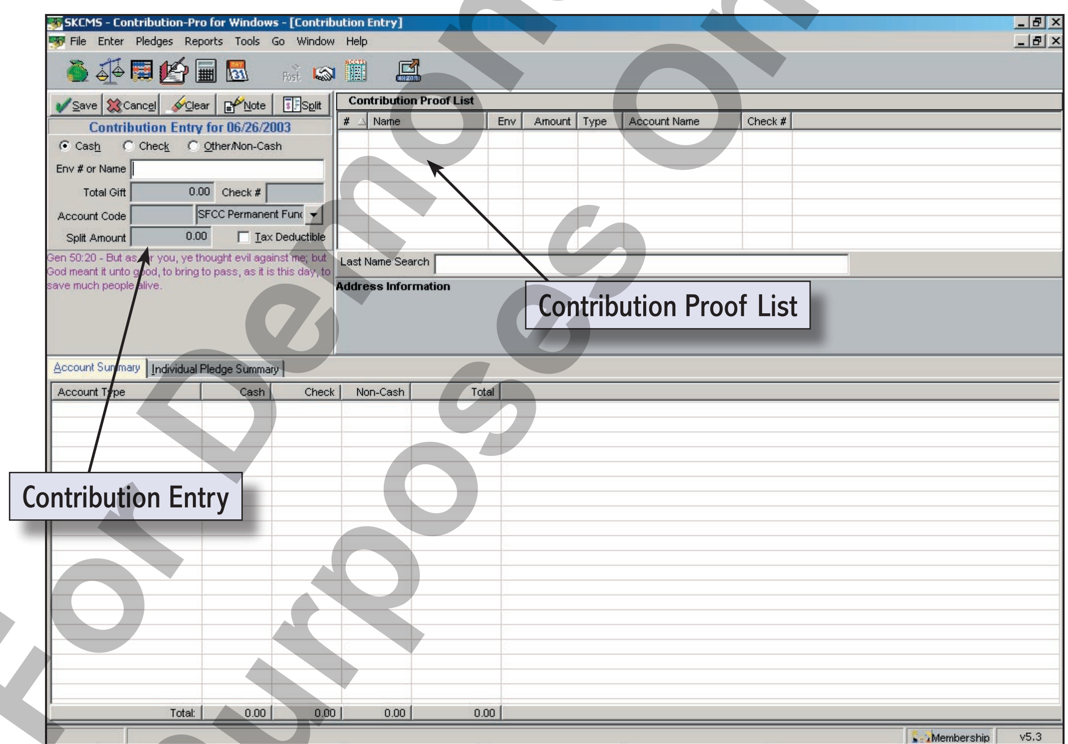


Figure 7. Contribution Entry Window

Contributions are entered in the left-hand section of the Contribution Entry window. Once saved, they will appear in the Contribution Proof List to the right, leaving the left-hand section clear for the next entry.

To enter a contribution

1. Select the contribution type (**Cash**, **Check**, **Other/Non-Cash**).
2. Enter the first few letters of the contributor's last name in the **Name** box.
3. Press **Enter**.
4. Choose one of the following:

   If the contributor is already in the database, a window will appear allowing you to select the correct name from a list of similar names.

   a. Select the correct name from the list.
   b. Go to step 5.

   If the contributor is not in the database, you will have the option of adding the contributor as a visitor. (You can always change the person's status later).

   a. Click **Add Visitor**.
   b. Select whether the contributor is an new individual or part of a family already in the database.
   c. Enter the contributor's known information.
   d. Click **OK**.

5. Enter the amount in the **Total Gift** box. Press **Enter**.
6. Enter the **Check Number**, if applicable. Press **Enter**.
7. From the pull-down menu next to the **Account Code** box, select the account. Click **OK**.

   If a split amount is designated for the contribution, see the following section.

8. Click Note if desired. Enter a note or memo and click **OK**.
9. Click **Save**. The entry will be displayed in the **Contribution Proof List**.

To enter split amounts

If a contribution has split amounts designated you can enter these during the **Contribution Entry** procedure on page 11. Complete steps 1 through 7, then follow the procedure below to enter split amounts.

1. In the Contribution Entry window, enter the first **Split Amount**.

2. Press **Enter**. This will bring you to the **Split Entry** window (see Figure 8).

   The first split will already be entered in the first row of the table in the bottom half of the screen.

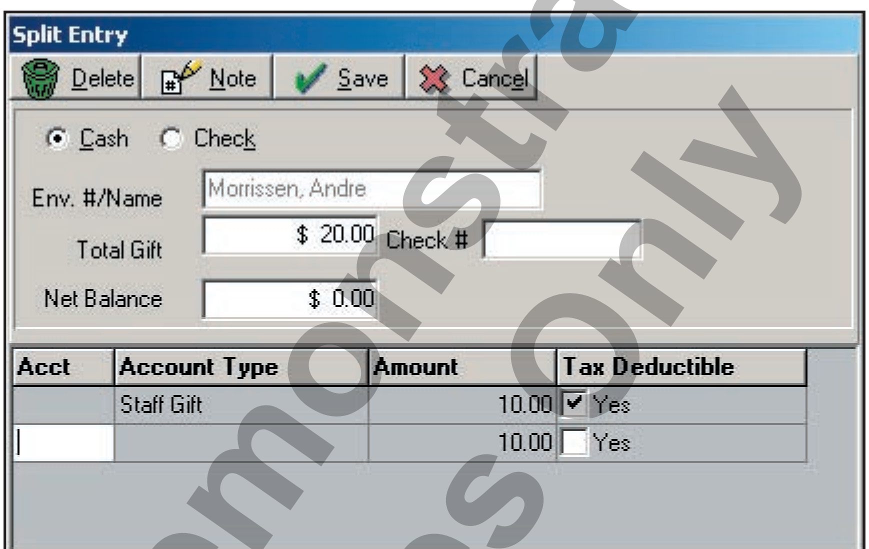


Figure 8. Split Entry Window

3. In the next row, select the **Account Type**. Press **Enter**.

4. Enter the **Amount**. Press **Enter**.

5. Select whether the split is **Tax Deductible** or not.

6. Click **Note** if desired. Enter a note or memo and click **OK**.

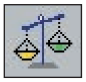
7 Repeat steps **5** through 7 for all additional splits.

8. Click 

Once the final split amount is entered, follow steps 10 and 11 of the **Contribution Entry** procedure on page 11 to complete the entry.

After all the contributions have been entered it's a good idea to check for mistakes before preparing a bank deposit. Servant Keeper includes features that help you in this process.

To verify amount of cash entered

1. Click  This will bring you to the **Cash Verification** window.
2. Enter the appropriate amount of coins and bills in the spaces provided.
3. If you total matches the computer total, click **OK**.

If your total does not match the computer total there is a mistake somewhere. It could be you entered the wrong amount during the Contribution Entry process or during the Cash Verification process. Double check all your entries on the Contribution Proof List and repeat the Cash Verification process until your total matches the computer total.

You can also verify the amounts and reference numbers of checks received to ensure you have entered these correctly.

To verify check information

1. From the **Reports** menu, click **Unposted Contribution Reports** then **Bank Deposit Report**.
2. Verify that the amounts and reference numbers of your checks match those on the resulting report.

Depending on how Servant Keeper's preferences are set, your report may display on screen or it may be sent to your printer.

You may want to add some notes or comments to the contribution information you have entered. Servant Keeper allows you to enter notes that will print with subsequent unposted reports.

To add notes to your contribution data

1. Click  This will bring you to the **Weekly Comments** window.
2. Enter notes and comments as desired.
3. Click 

Once all the contributions have been entered and you have included any notes or comments, you can print unposted reports.

To print unposted reports

1. From the **Reports** menu, click **Unposted Contribution Statements**.
2. Click one of the following choices:
    a. **Proof List**
    b. **Account Summary**
    c. **Entries Started w/ Selected Account**
    d. **Bank Deposit Report**
3. Specify any additional options such as date range or sorting options.

Depending on how Servant Keeper's preferences are set, your report may first display on screen instead of printing directly.

To print reports that first display on screen

1. Create the report you would like to print.
2. Click 
3. Set desired printer options.
4. Click **Print**.

After verifying that all the contribution data is correct, you should post it. Contributions for different days cannot be entered until the current contributions are posted.

To post contribution data

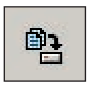
1. Click 

A confirmation window will appear.
2. If necessary, change the date of the contribution data.
3. Click **OK**.

Backup and Restore

It's a good idea to backup the data in Servant Keeper on a regular basis. Backup files can be archived and restored, enabling you to return to a previously saved state. This is useful for instance, if you need to replace posted contribution information. Backup files can also be restored to copies of Servant Keeper on other computers, allowing multiple users to share the information.

To backup up Servant Keeper

1. Open **Admin Pro**.
2. Click  A window will appear.
3. If desired, change the path and filename in the **Backup To** box.*
4. Click **OK**. Admin Pro will compress the data.
5. Follow the on-screen prompts to complete the process.

Before you can use the information in a backup file you must restore it to the computer where Servant Keeper is installed. You can restore a backup file to any computer that has Servant Keeper version 5 or higher.

To restore a backup file

1. Open **Admin Pro**.
2. Click  A window will appear.
3. Type the path and filename of the backup file in the **Source** box.*
4. Click **OK**.
5. Follow the on-screen prompts to complete the process.

* NOTE: If you omit this step, Servant Keeper will create a file called SKBACKUP.ZIP and write it to a floppy disk. By default, it will also look for this file on a floppy disk when restoring.