

SERVANT KEEPER

Upgrade to Version 8



Enhancements to All Servant Keeper Modules

Administration Manager - Membership Manager - Contribution Manager - Servant PC Cloud

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Upgrade to SK Version 8

The Software You Know and Love with New Features and Functionality You Wanted

In Servant Keeper version 8, you'll find the look and feel you're familiar with, all the features you already use and love, plus additional new features and functionality designed to help your ministry continue to grow.

Easy Upgrade

Upgrading to SK 8 is a snap. Functionality and new features will be intuitive so your whole team will be able to leverage them quickly and improve the way they do ministry.

Version 8 Servant PC Cloud Updates

New Servant Keeper Online Office

Access Online Office From Anywhere with Only an Internet Connection

Servant Keeper users can now use Online Office anywhere they have an internet connection to:

- Look up and edit basic family and individual contact information and notes
- Add new records.
- Manage the Online Directory settings.
- Manage member access.

The screenshot displays the 'SERVANT KEEPER ONLINE OFFICE' interface for 'First Friendly Church'. The interface is divided into a left sidebar and a main content area. The sidebar contains navigation links: Main List, Add Individual, Control Panels, Directory, Member Access, Integrations, User Profile, Users, Downloads, Logout, Online Office Help, and Contact Support. The main content area has tabs for Settings, Invitations, and Permissions. The 'Settings' tab is active, showing a form titled 'What information can members update?'. This form has two columns. The left column lists 'Contact Information' (Family, Individual), 'Attributes' (Sunday School, Skills Talents, Visitor Follow-up Letters Received, Activities, Spiritual Gifts, Mailing Lists, Leadership Positions, Willing to Serve, Favorite things to eat, Allergy), and 'Skills Talents'. The right column has a section for 'Skills Talents' with a checkbox to allow families to update items, a text area for 'Enter instructions for your members.', and a section for 'Select the items members can add to their profile.' with checkboxes for Drama, Administration, Artist, Caregiver, Carpentry, Computer, Cooking, and Design.

SERVANT KEEPER ONLINE OFFICE

First Friendly Church

Settings | Invitations | Permissions

What information can members update?

Contact Information

Family
Individual

Attributes

Sunday School
Skills Talents
Visitor Follow-up Letters Received
Activities
Spiritual Gifts
Mailing Lists
Leadership Positions
Willing to Serve
Favorite things to eat
Allergy

Skills Talents

Choose whether families can update items in Skills Talents for their family members.

Enter instructions for your members.

Select the items members can add to their profile.

☐ Drama
☐ Administration
☐ Artist
☐ Caregiver
☐ Carpentry
☐ Computer
☐ Cooking
☐ Design

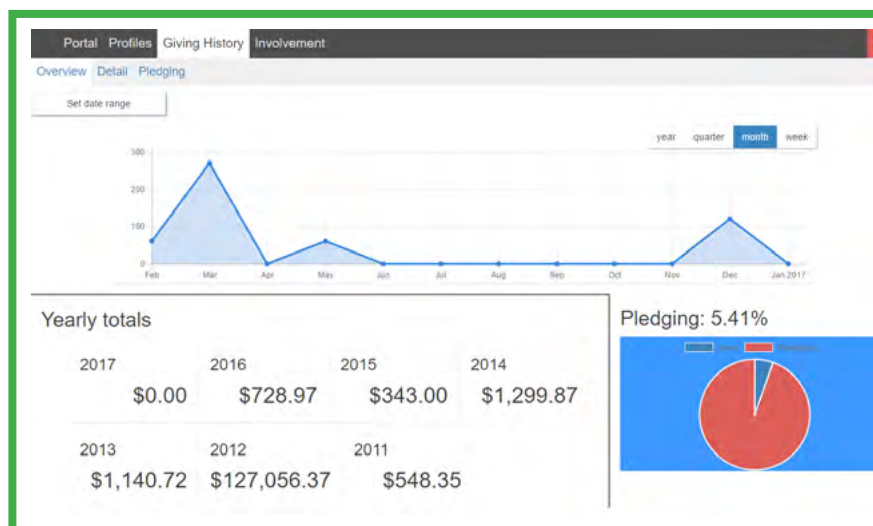
Online Directory Member Portal Enhancements

Giving History Graph

Members can now view their giving history on an easy-to-read graph, and select to view history by date.

Giving Detail Tab

Members can now view a detailed list of their giving history that shows the date, amount, account the funds went to, the payment type, check number if applicable, as well as whether or not it was a taxable donation.



Pledging Tab

Members can now see accounts that each of their family members are pledging to with additional pledge giving information including: pledge account name, amount pledged, received, and remaining, frequency, duration, and number of payments.

The screenshot shows the 'Pledging' tab with a list of family members and a table of pledge information.

Family Member	Account name	Received	Remaining	Pledged
Mike	Retreat fund	\$150.00	\$100.00	\$250.00
Sarah	gym fund	\$241.00	\$4959.00	\$5200.00
Ablgall	Faith Promise 2014	\$300.00	\$900.00	\$1200.00
Alden	Faith Promise 2016	\$75.00	\$1125.00	\$1200.00
Jenna				

Licensing Change

One Cloud, Unlimited Seating

When you purchase the cloud, you can now install the software on as many computers as you need without software license codes or seat purchases.

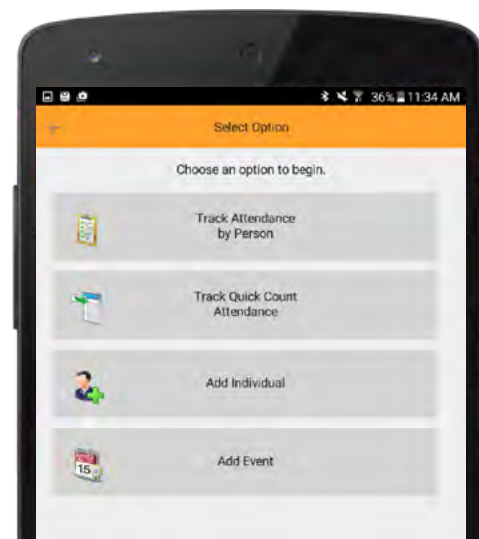
Updated Greet and Attend App

Additional Attendance Tracking Options

Now track attendance to worship services, Sunday school classes, activities, and small groups either by person, quick count, or a combination of person and quick count.

Add New Events

Users can now add new events through the app and take attendance for events not already in Servant Keeper.



Have Questions about Upgrading to the Cloud?

Call Sales: 800-773-7570

Email Sales: sales@servantpc.com

Version 8 Administration Manager Updates

Improved Password Management

Protect Your Ministry's Data

Version 8 has additional built-in security features to protect your ministry's data with ease, and give you peace of mind.

- Built in password requirements based on security best practices.
- A live password ranking tool that lets you know if your password is weak or strong.
- The ability to view your password characters as you type them in. This prevents failed logins.
- Users can reset forgotten passwords. The Reset Password button will email them a temporary password.

New User Information [X]

User Information:

Name:
(This is never used for log in)

Login Information:

Email:

Password: [eye icon]
strong

Confirm Password: [eye icon]
strong

[Save] [Cancel]

Import Tool

The Import tool is now built into Servant Keeper. Users can now import membership data from an Excel, CSV or TXT file. The tool has been redesigned to allow users to import into every check box, text, drop down, list box and numeric field in Servant Keeper.

Step 1: Choose your import file format options. Save Step 1 Settings

Data has Header Row? ☒ Yes ☐ No

Field Delimiter: ☒ Comma ☐ Space ☐ Semicolon

Text Qualifier: ☒ Double Quote ☐ Single Quote ☐ None

Start Importing at Row: 1

Delimiter used for attribute fields:

Preview of Import File

Last Name	Middle Name	First Name	Relationship	Address	City	State	Zip
Arnold		John	Head of Household	300 Front Street, Apt. 1	Lock Haven	CO	1774
Arnold		Marce	Spouse	300 Front Street, Apt. 1	Lock Haven	PA	1774
Arnold		Laura	Daughter	300 Front Street, Apt. 1	Lock Haven	PA	1774
Arnold		Tommy	Son	300 Front Street, Apt. 1	Lock Haven	PA	1774
A-Team		ORGANIZATION	Organization Record	1980 S Television St	Holly Wood	CA	9999
Bassett		Flash	Son	10 Cowpath Rd	Green Acres	PA	1800
Beelzebub's Furnace Company		ORGANIZATION	Organization Record	666 Hot St	Waterville	PA	1774
Bitner		Jane	Spouse	202 Hogan Blvd	Lock Haven	PA	1774
Bitner		Lauren	Daughter	202 Hogan Blvd APT1	Mill Hall	PA	1775

User Access

Deactivate/Activate Button

The Servant Keeper User's Access privileges screen now includes a deactivate button. Manage seasonal or temporary users and save data tied to your users. You can now deactivate a user instead of deleting them. This also allows you to save users and information attached to them, like notes, while permanently or temporarily removing their access to your Servant Keeper. You can view whether any user is activated or deactivated in the Servant Keeper Users window.

New Report Security Options

You can now set a user's ability to interact with both membership manager and contribution manager reports in the following ways: grant or deny permission to copy and edit, delete, download, share, rate, and edit reports.

Deleting, Viewing and Restoring Users

Delete users with confidence. Servant Keeper will now prompt you if any private notes are not shared with others when deleting a user. The View Restore Deleted Users tool now allows you to see a list of users that have been deleted. Choose to restore, or permanently delete anyone on the list.

In addition, Servant Keeper will now alert you when the new user you are trying to create has the same email address as one you've already deleted. This will prompt you to restore the deleted user or use a different email address.

View Network User Email Address and History

Now, when viewing logged in users, you will see their email address alongside their username. In addition, in the User Activity log tab, you'll see the Servant Keeper modules each user has logged into for a specified date range.

User(s) Logged on to the system

Logged In Users | **User Activity Log**

Date Range: Yearly 2017 01/01/2017 - 12/31/2017

Find Print

User ID	Email	User Name	Activities	Date/Time
X	x@x.com	X	Logged on to Contribution Manager	1/6/2017 2:11:53 PM
MIKE	mikeo@servantpc.co	Mike Osborne	Logged on to Membership Manager	1/6/2017 2:11:14 PM
MIKE	mikeo@servantpc.co	Mike Osborne	Logged on to Administration Manager	1/6/2017 12:29:56 PM
MIKE	mikeo@servantpc.co	Mike Osborne	Logged off from Membership Manager	1/6/2017 12:29:52 PM
MIKE	mikeo@servantpc.co	Mike Osborne	Logged off from Contribution Manager	1/6/2017 12:29:36 PM
MIKE	mikeo@servantpc.co	Mike Osborne	Logged on to Membership Manager	1/6/2017 12:12:34 PM
MIKE	mikeo@servantpc.co	Mike Osborne	Logged off from Administration Manager	1/6/2017 12:12:28 PM
MIKE	mikeo@servantpc.co	Mike Osborne	Logged on to Contribution Manager	1/6/2017 9:28:06 AM
MIKE	mikeo@servantpc.co	Mike Osborne	Logged on to Administration Manager	1/6/2017 9:27:34 AM



Version 8 Membership Manager Updates

Manage Your Events and Email Campaigns

Simple Event Management with Eventbrite

Eventbrite is a leading event management application that allows you to create, promote, and host live events with a user friendly online tool.

With the new Eventbrite integration, after you create your event, you can then track registrations, past attendance, and do follow-up within Servant Keeper. Plus, you can manually sign up (or unattend) an attendee to an event from within their Servant Keeper profile.

E

Events

Print

Refresh

View in Web

Manual Match All

Settings

Name	Status	Start Date	Contribution Account
VBS	live	8/5/2020 10:00:00 AM	
Local Short-Term Mission Trip	live	4/25/2020 6:00:00 PM	New Tribes Missions
College Ministry Spring Break	live	4/5/2020 7:00:00 PM	Hawaii Missions Trip a
Men's Retreat	live	3/28/2020 7:00:00 PM	Retreat Fund
▶ Christian Rock Concert	live	3/25/2020 7:00:00 PM	
Women's Retreat	live	3/10/2020 5:30:00 PM	Retreat Fund

Select Fields

Manual Match

Matched	Registrant First Name
▶ Matched	Louie
Matched	Suey

Manage Mail Chimp Email Campaigns within Your Servant Keeper

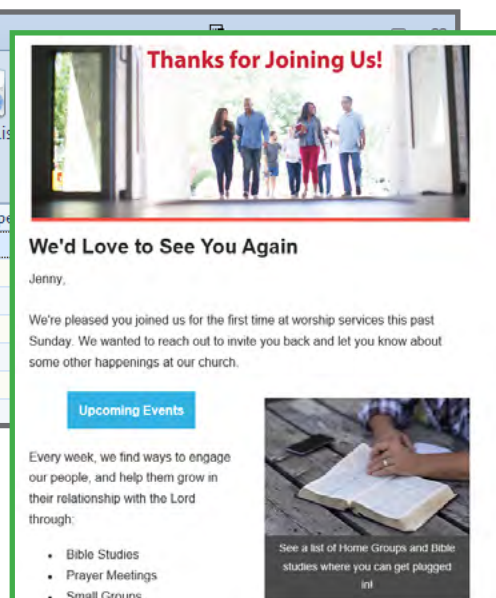
Mail Chimp is a free email marketing solution that can help your church or ministry to send professional looking emails, create email campaigns and see reports of who is opening and clicking on the links in your emails so you know who is engaging and who needs more follow-up.

Through Servant Keeper's MailChimp integration, you can now add and delete someone from your Mail Chimp email campaigns from within their Servant Keeper profile. Easily add visitors to a Visitor email campaign, or a group to a series of emails promoting an upcoming retreat. Mail Chimp campaigns are tracked as touch points inside individual profiles.



The screenshot shows the MailChimp List Manager interface. At the top, there are icons for Print, Open In Browser, Refresh, Create List, Delete List, and Update List. Below these icons is a table with columns: List Name, Subscribers, Unsubscribed, and Opened. The table lists several email lists: 'Please send more money' (6 subscribers, 0 unsubscribed), 'Home Group' (6 subscribers, 0 unsubscribed), 'Test List' (83 subscribers, 0 unsubscribed), 'Youth Newsletter' (42 subscribers, 0 unsubscribed), 'an unimportant list' (2 subscribers, 0 unsubscribed), 'Church Newsletter' (85 subscribers, 0 unsubscribed), and 'Prayer Chain' (49 subscribers, 0 unsubscribed).

List Name	Subscribers	Unsubscribed	Opened
▶ Please send more money	6	0	
Home Group	6	0	
Test List	83	0	
Youth Newsletter	42	0	
an unimportant list	2	0	
Church Newsletter	85	0	
Prayer Chain	49	0	



Track More Information Inside Your Individual Profiles

Track More Relationships

The relatives tab has the following new options: Mentor/Mentee, Sponsor/Sponsee, Partner/Partner, Disciple/Disciplee. Choose to expand or collapse all relatives for easy viewing, as well as print the list via a new print button.

Communion Tracking and Date Last Attended

If you're tracking communion by person, you can now view the number of times and when a person has taken communion from the attendance tab. Plus you can view a member's last attended date to see who may need you to reach out to them.

Track Statement Preference

Update who would like to receive email statements via the email statement check box in any members' profile.

Track Different Last Names in a Family

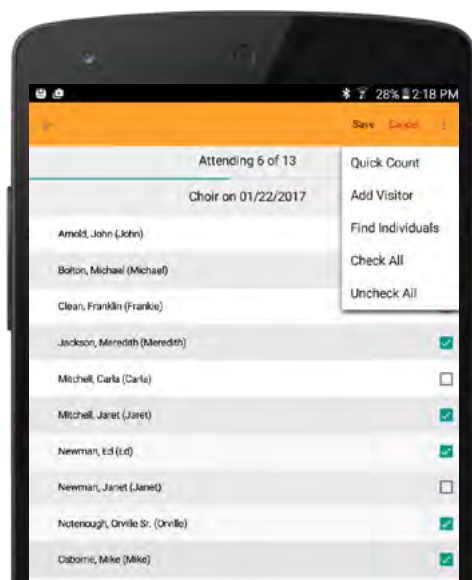
If last names of head of household and spouse are different, Servant Keeper will automatically display the correct last name information in the directory name and mailing name.

Track More of the Data You Want

You can now rename all check boxes in individual profiles. And define four new number fields in the main profile.

Easy Small Groups Attendance and Communication

Use the small group field in individual profiles to view and take small group attendance. This box links with attendance tracking, so attending someone to a small group will automatically add that group to their list. Set up a group in Groups Keeper and they can automatically be added to receive any communication (email campaigns, text alerts) related to the small group they are attending.



IndividualAltAttributesNotesEventsInfoOverviewAttachmentsRelativesYouth InformationHistory

Contributions/PledgesAttendanceTouch PointsEventbriteMailChimp

All Dates

Find

All Dates Included

Print

Date	User	Type	Description
12/16/2016	Mike	Background Check Sent	Background Check Sent
12/16/2016	Mike	Business	This is a business meeting to talk about stuff
12/13/2016	Mike		Mail Merge
11/21/2016	x	Eventbrite - Attended	Registered for Event: A Spectacular Event
09/02/2016	Mike	Eventbrite - Attended	Registered for Event: Sportsman's Day
09/02/2016	x	Eventbrite - Attended	Registered for Event: Sportsman's Day
09/02/2016	Mike	MailChimp	Emailed from MailChimp Campaign: email
09/02/2016	x	MailChimp	Emailed from MailChimp Campaign: email
08/31/2016	Mike	Eventbrite - Registered	Attended Event: LAN Party
08/31/2016	x	Eventbrite - Registered	Attended Event: LAN Party

Edit, Build, and Share Reports with Other Churches

Edit Report Templates to Meet Your Needs

Need to customize one of the available Servant Keeper reports? No problem. The new built-in report editor allows you to copy existing Servant Keeper reports and edit them to meet your needs.

Create Your Own Reports

There is a new custom category in Report Manager that you can use to create new reports for Servant Keeper based on available datasets.

Browse, Share, Download and Rate Reports From the Servant Keeper Community

As a Servant Keeper user, you're part of a growing community of tens of thousands of ministries. Leverage the experience and resources of others in ministry with Servant Keeper shared reports. You can now browse others' reports, download them, and rate them to help others find the best reports. Have a report that has helped your ministry? Pass it along by sharing it with the Servant Keeper community for others to use.


New Report Templates

Version 8 added 25 new membership reports to the already available Servant Keeper reports including:

- Baptism and Confirmation — Now you can print baptism and confirmation reports.
- Eventbrite Report — This report gives you info on event attendance by date and event, venue list, and more for your Eventbrite events
- Important Events by Individual — Pull this report based on a specific date range.
- Relatives — Allows users to print reports based on information entered in the relatives tab.
- New User Accounts — Print reports based on Servant Keeper User information.

Faster Reports and Material Printing

You can now print multiple copies of the same label, envelope, name tag, rotary card or profile reports when using quick print from reports manager.



First Friendly Bible Church	
Member Status Attendance Event Totals	
Adults	Total Attended
Active Member.....	1
Pew Warmer.....	1
Total for Adults: 2	
Chipmonks	Total Attended
Hyper-active.....	5
Visitor.....	2
Total for Chipmonks: 7	
Fire & Brimstone	Total Attended
Active Member.....	1
Total for Fire & Brimstone: 1	
Junior High	Total Attended
	1
	Total Attended
	1
	Total Attended
	1



Rate the Shared Report

4 Column Family Picture Directory w Phone and Email On

Previous Rating: ★★★★★

OK Cancel

Improved Background Check Management

Background Check Date

If you're using Servant Keeper's integrated background check service, individual profiles will now display the background check date. This will help you to keep your background checks current, and your children's ministry safe.

Eliminate Data Entry

The integrated background check service has been upgraded to make the process of submitting background checks even easier. Now information is pulled from an individual's profile so you can start a background check after entering less information.

A screenshot of a web form for submitting background checks. The form is titled 'Type of Package' and has five radio button options: Basic, Plus (selected), Motor Vehicle Report, Credit Check, and PA 153. To the right of these options are input fields for 'Social Security #' (111111111), 'Criminal Search' (State selected, County unselected), 'State' (PA selected, County unselected), 'Drivers License #' (empty), and 'State Code' (Pick State Here dropdown). A green checkmark icon and the text 'Start Background Check' are in the top right corner. Below this is a link 'View Pricing and Options'. At the bottom of the form, it says 'v1.0.0.0', 'Call 570-748-2800 for Support.', and a 'Close' button.

Powerful Groups Search and Faster Group Communication

Find any Person or Information

Groups Keeper has a new search tool that lets you search after running a group. Run a group, then search within it on almost any field selected to display in that group. Pull your new visitors for the past year and search for anyone in a specific zip code to see where new attendees are coming from. Display your past year's women's retreat group and search for anyone who has skills in event promotion to help you get the word out about attending this year.

From your search results you can quickly merge your people into an email or letter, print your list, schedule an appointment, update their pictures and more. For example, you could pull your youth group, search for anyone who hasn't been in attendance for a few weeks, then merge them into an email from the youth pastor dropping them a friendly hello.

A screenshot of the Groups Keeper search interface. The top bar has 'Smart Groups' and 'Display Group' tabs. Below the tabs are two main sections: 'List Options' and 'Group Options'. 'List Options' includes buttons for 'Close', 'Save As', 'Select Fields', 'Reverse Tag', and 'Edit Group'. 'Group Options' includes buttons for 'Refresh Result', 'Smart Groups', 'Email Group', 'Print Group', 'Merge', and 'Group Reports'. Below these is a section for 'Group Selected: *Newsletter' with 'Expand All' and 'Collapse All' buttons. A search bar contains the text 'active member' with 'Find' and 'Clear' buttons. Below the search bar is a table with columns: Tag, Last Name, First Name, Age, Member Status, and Address. The table contains five rows of data, all with 'Active Member' status.

Tag	Last Name	First Name	Age	Member Status	Address
<input checked="" type="checkbox"/>	Michaelson	Lana		Active Member	855 Fourth Street
<input checked="" type="checkbox"/>	Hampton	Connie	23	Active Member	1234 Fort Rd
<input checked="" type="checkbox"/>	Frompus	Royal	54	Active Member	123 Main St
<input checked="" type="checkbox"/>	Ferguson	Dianne		Active Member	13344 Flower Blvd
<input checked="" type="checkbox"/>	Cosentine	Victor	23	Active Member	534 Applegate Way

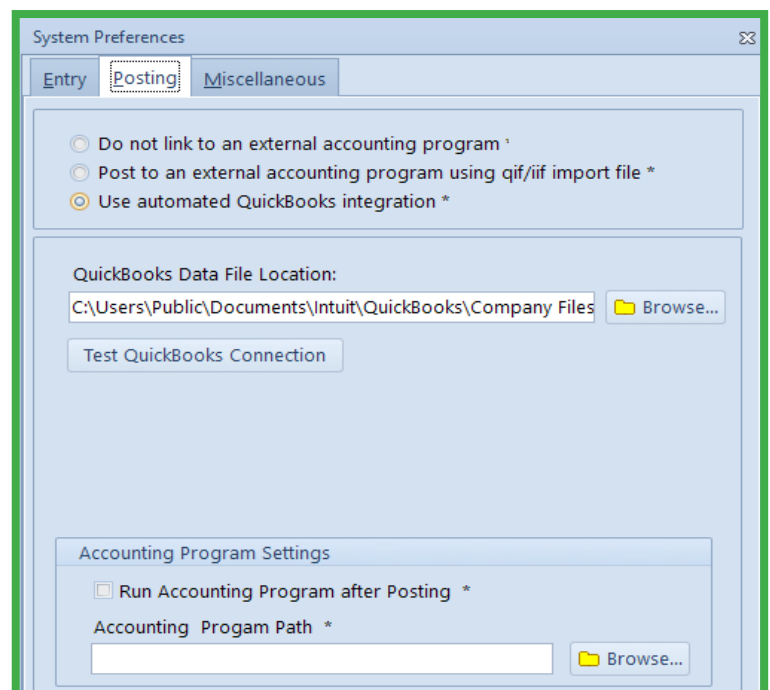


Version 8 Contribution Manager Updates

Automated Contribution Posting

Post to QuickBooks Automatically without Importing

Servant Keeper's already solid integration with QuickBooks just got better. Now, you can choose to have contributions posted to QuickBooks as soon as they're posted in Servant Keeper without having to import a QuickBooks iif file. This will eliminate steps in the process of adding new transactions, help you to keep your records automatically up-to-date, and allow you to provide someone access to your contributions management without allowing access to your QuickBooks.



Preferences

Sunday Date Prompt

Choose to be prompted when the contribution date selected is not Sunday.

Fonts and Themes

You can now select Office 2010, Office 2013, Office 2016, Mac OS or Native Windows themes. You can also change the font size, type and style for the grids in contribution manager.

Select Your Database

For users managing their databases in the local version, you can choose either a Servant Keeper 8 database file or a Servant Keeper 7 database file.

Entry

Delete Memorized Transactions

A new Delete this Memorized Transaction button allows users to delete memorized transactions linked to a contributor.

Edit User Profiles

The Edit Profile button on the contribution entry screen now opens the entire profile to allow the user to add/edit any information in the profile.

Batch Manager

Select Posted/Unposted Batch Drop Down Menu

In batch manager there is a new Select Posted/Unposted batch drop down menu that allows the user to choose to show either all Unposted or all Posted batches. From here, users can edit batch names and comments, and delete empty batches with a 0.00 balance created by using the change posted batch date tool.

Edit Posted Entries

A new Change Pay Type/ Tax Status option allows users to change the pay type or tax status for posted contributions based on the selected date range.

Pledge Tracking, Payment Tracking, and Listings Tool

Print List Updates

In the Pledge and Payment tracking windows and when using the Listings Tool, you can now choose to show or hide tags and grid lines when printing a list. You can also choose to display a multi-page preview.

Merge with Email Writer or SK Writer Templates

You can now choose to merge family and individual information with Email Writer Templates and SK Writer Templates by clicking on the Merge List button when using the listings tool.

Report Manager

There are over 10 new Contribution reports. There is also a new built in report editor, the ability to browse, download, share, rate and edit reports through the Servant Keeper community. Plus, you can set reports as default reports for each category. See more about updates to the Report Manager in the Membership Manager Upgrade highlights section of this brochure.

SERVANT KEEPER

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