*Servant**PC***

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.

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.
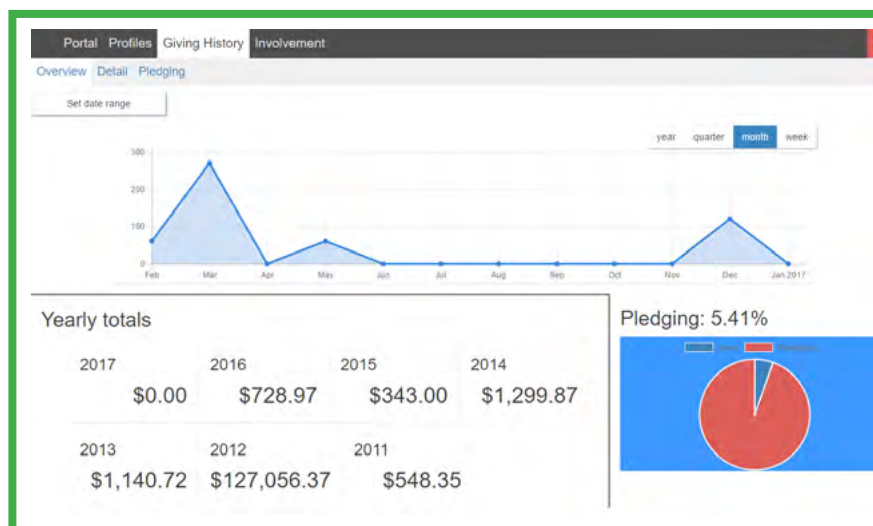
Pledging Tab

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.

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.
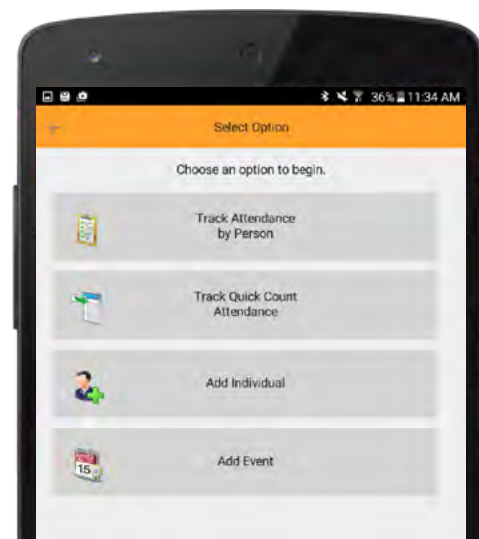
Have Questions about Upgrading to the Cloud?

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   ✕

User Information:

Name: Rip Vanwinkle

(This is never used for log in)

Login Information:

Email: Rip@sleepyguy.com

Password: servant1

strong

Confirm Password: ●●●●●●●

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.

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.

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.

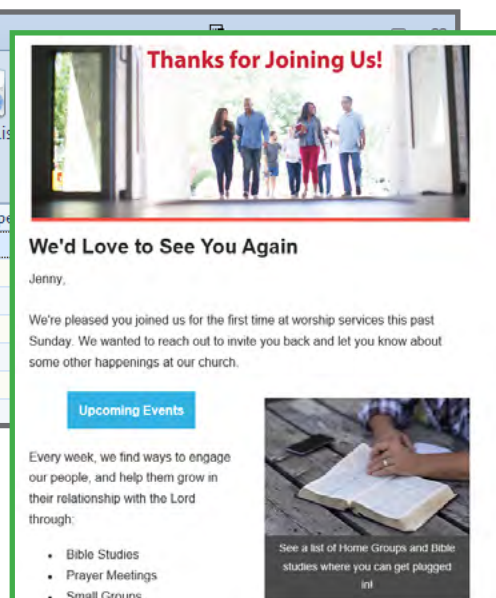## Manage Mail Chimp Email Campaigns within Your Servant Keeper

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.

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.

Improved Engagement with Your Visitors and Attendance Tracking

Attendance tracking has been redesigned to speed up the attendance taking process. Some new features include:

Quick, Complete Visitor Records and Easier Follow Up

When adding a visitor through attendance, the entire profile is now available. This makes it faster and easier to perform actions like creating a complete record, adding them to a group for the class or event they are attending, add them to your new visitor email campaign and more all within minutes of meeting them.

Manage Periodic Events

You can now deactivate and reactivate attendance events from the attendance tracking module. This allows you to better manage events that only happen on a periodic basis.

Verify that Ministry is Happening with Touch Point Tracking

Servant Keeper is designed to help you ensure that ministry is happening and that nobody is falling through the cracks. Now you can see a full picture of how your ministry is interacting with each individual member. Through the Touch Point tab, you can see:

- Appointments from the scheduled appointment tool that are marked complete.

- SK Writer letters and or Email Writer emails sent.

- Events registered for through Eventbrite.

- Email campaigns sent to an individual through Mail Chimp.

- Background checks done though the Servant Keeper integrated background check.

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.

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.

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.

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.
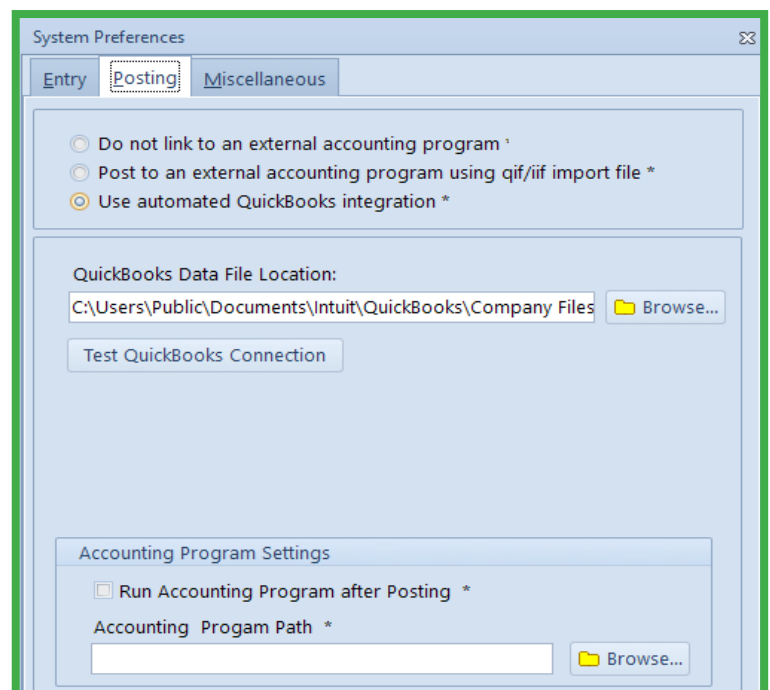
Preferences

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

Contact Us:

Sales: 800-773-7570

sales@servantpc.com

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