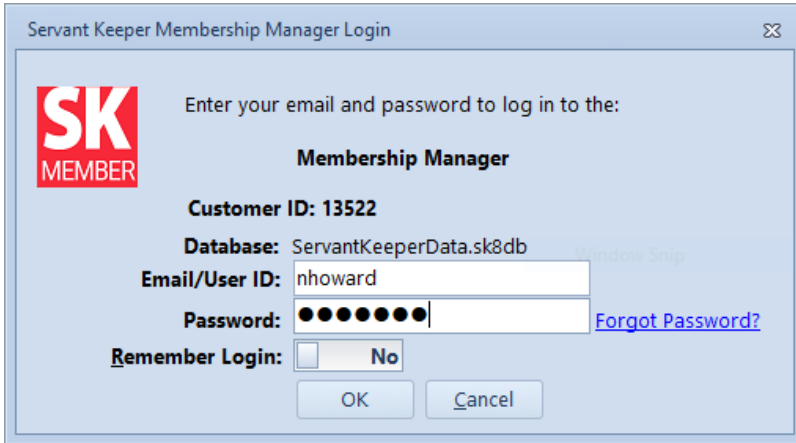


Adding A Member to the “Giving Statement by Email” List

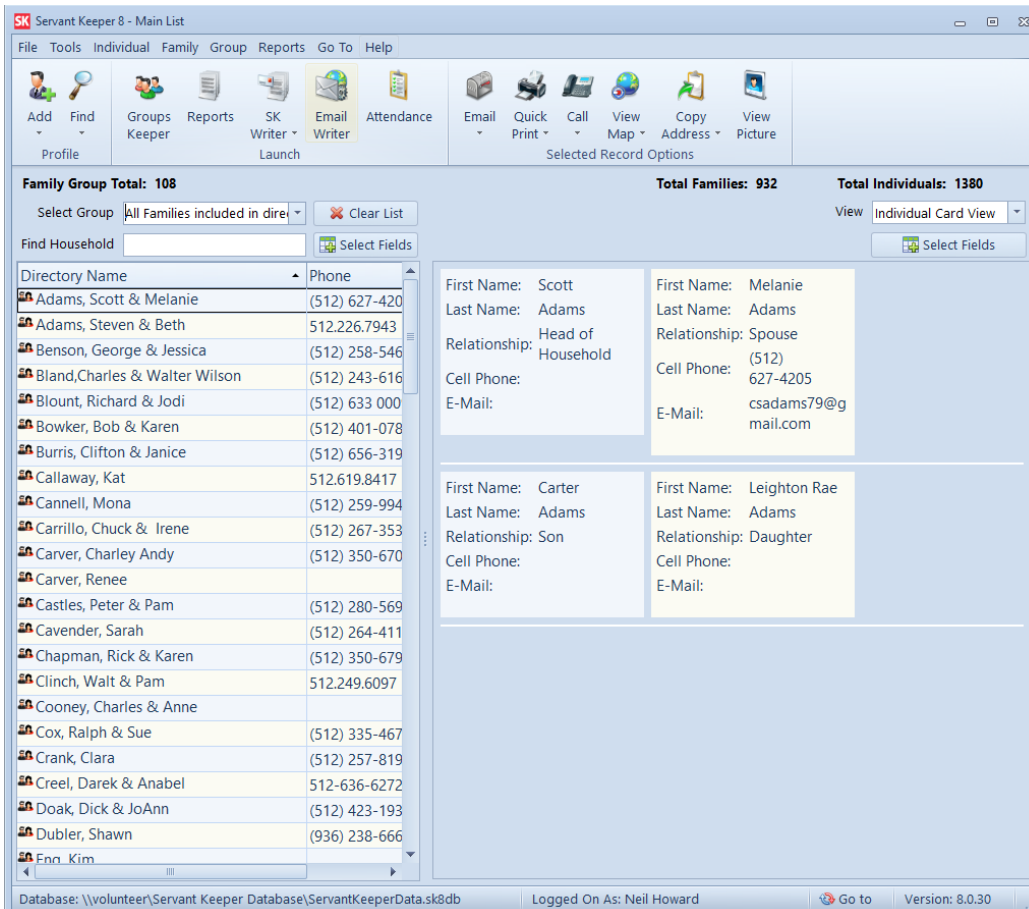
When a person elects to have their quarterly giving statement emailed to them, this selection must be checked in their Servant Keeper record. Once this is done, they will appear in the “Email Statement = YES” group which is used by Servant Keeper to provide names and email addresses of recipients to which quarterly giving statements will be emailed. Below are the steps in Servant Keeper Membership Manager to check a member’s selection.

1. Log in to Servant Keeper Membership Manager.



The screenshot shows the 'Servant Keeper Membership Manager Login' dialog box. It features the 'SK MEMBER' logo on the left. The main text reads 'Enter your email and password to log in to the: Membership Manager'. Below this, it displays 'Customer ID: 13522' and 'Database: ServantKeeperData.sk8db'. There are two input fields: 'Email/User ID:' containing 'nhoward' and 'Password:' with masked characters. A 'Remember Login:' checkbox is set to 'No'. There are 'OK' and 'Cancel' buttons at the bottom. A 'Forgot Password?' link is also present.

2. Select the “All Families included in the directory” from the pull-down Select Group list



The screenshot shows the 'Servant Keeper 8 - Main List' application window. The top menu bar includes 'File', 'Tools', 'Individual', 'Family', 'Group', 'Reports', 'Go To', and 'Help'. Below the menu is a toolbar with icons for 'Add', 'Find', 'Groups Keeper', 'Reports', 'SK Writer', 'Email Writer', 'Attendance', 'Email', 'Quick Print', 'Call', 'View Map', 'Copy Address', and 'View Picture'. The main area displays summary statistics: 'Family Group Total: 108', 'Total Families: 932', and 'Total Individuals: 1380'. A 'Select Group' dropdown menu is set to 'All Families included in dire...'. Below this is a 'Find Household' search bar and a 'Select Fields' button. The main list shows a table of household records with columns for 'Directory Name' and 'Phone'. To the right of the list, there are two detailed view panels for selected records, showing fields like 'First Name', 'Last Name', 'Relationship', 'Cell Phone', and 'E-Mail'.

3. Find the member record to be updated by browsing or typing the family name into the Find Household field

SK Servant Keeper 8 - Main List

File Tools Individual Family Group Reports Go To Help

Add Find Groups Reports SK Email Attendance
Keeper Writer Writer Launch

Email Quick Call View Copy View
Print Map Address Picture
Selected Record Options

Family Group Total: 108 Total Families: 932 Total Individuals: 1380

Select Group All Families included in dire... Clear List View Individual Card View

Find Household howard Select Fields Select Fields

Directory Name	Phone
Higgins, Gerry & Brenda	630-362-5978
Hilton, Jane	832.525.9964
Hohle, Ronnie & Julie	(512) 335-014
Holmes, Nancy	(512) 337-527
How, Mark & Bonnie	(512) 983-743
Howard, Neil & Jane	(512) 456-703
Howard, Steve	(512) 528-585
Inzunza, Richard & Anjanette	
Jackson, Raymond & Kathy	(512) 350 924
Johnson, Bodie & Sally	512 422 4486
Kelly, Diane	(512) 904-023
Keys, Parthenia	(512) 243-740
King, Ron & Barbara	(512) 415-115
Kreh, Eileen	(512) 947-384
Lack, Cephus & Wanda	832-515-5158
Laughlin, Holly	(512) 267-721
Lawrence, Cynthia	(512)-586-841
Litaker, Colleen	(512) 963-255
Lo, Andre & Sharon Wang	(737) 529-138
Longoria, Sergio & Debra	(512) 260-507
Lundstrom, Russ & Jill	(512) 712-537
MacCarroll, Debbie	(386) 627-038
Martin Anita & Larry	(512) 250-072

First Name: Neil	First Name: Jane
Last Name: Howard	Last Name: Howard
Relationship: Head of Household	Relationship: Spouse
Cell Phone: (512) 720-1990	Cell Phone: (512) 496-5950
E-Mail: nhowardtx@gmail.com	E-Mail: quilterjaz@gmail.com

Database: \\volunteer\Servant Keeper Database\ServantKeeperData.sk8db Logged On As: Neil Howard Go to Version: 8.0.30

4. Double-click on the line with the member's name to open their family profile

SK Family Profile

Profile

Save & Close Cancel & Close Delete Save

Main Find Email Quick Call View Web Copy Add Add Add Add
List Navigation Navigation Print Map Page Address Address Spouse Son Daughter Other
Options Options Add Family Members

Family Profile Notes More Information Relative History

Howard, Neil & Jane

Directory Name: Howard, Neil & Jane Phone: (512) 456-7034 Unlisted

Salutation: Neil & Jane Email: nhowardtx@gmail.com Unlisted

Mailing Name: Mr. & Mrs. Neil Howard Emergency Contact: Unlisted

Address: 1801 Nicholas Zane Dr Delivery point: 01 Emergency Phone: Unlisted

Unlisted Addr: City: Cedar Park State: TX Geographic Zone: Unlisted

Zip Code: 78613 Website: Unlisted

Mailing List: Unlisted

Member Status: Active Member Include Family in Directory: Email Statement:

Cross Ref	Directory	Link	Name	Relationship	Age	Cell Phone	Work Pho	E-Mail	Contact
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Neil Howard	Head of Household		(512) 720-1990		nhowardtx@gmail.com	Primary
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jane Howard	Spouse		(512) 496-5950		quilterjaz@gmail.com	Secondary

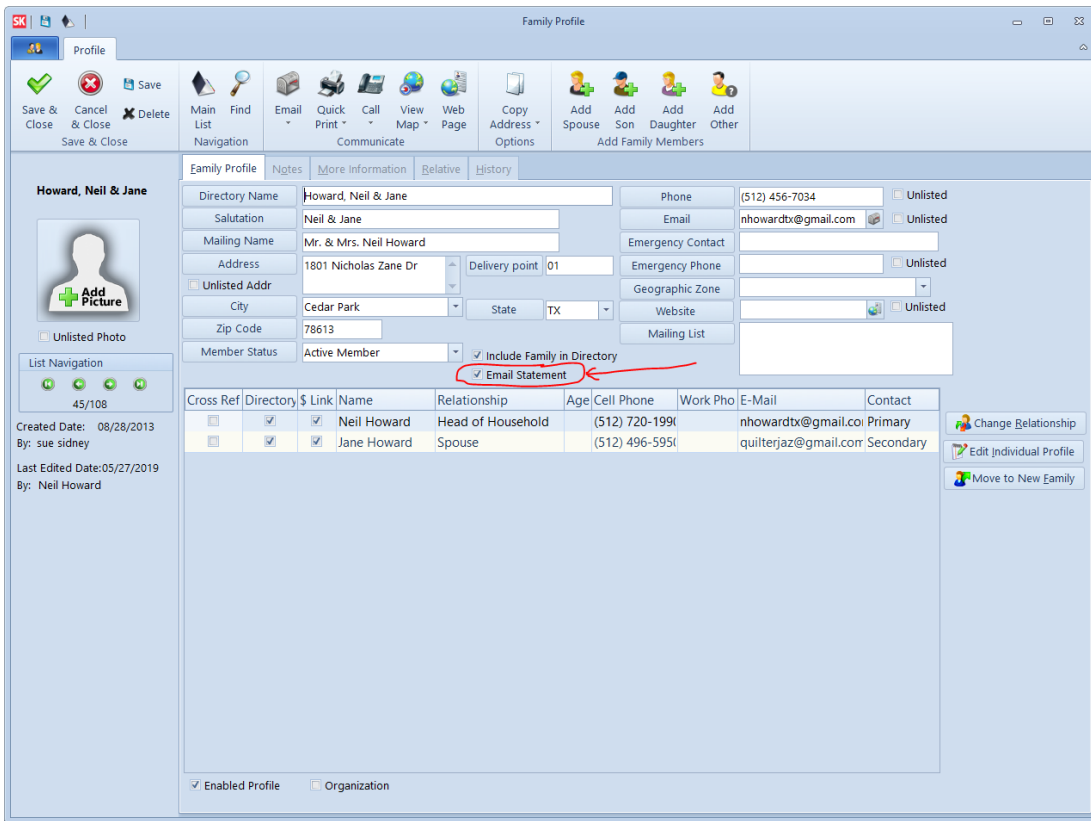
Change Relationship Edit Individual Profile Move to New Family

Created Date: 08/28/2013 By: sue sidney Last Edited Date: 05/27/2019 By: Neil Howard

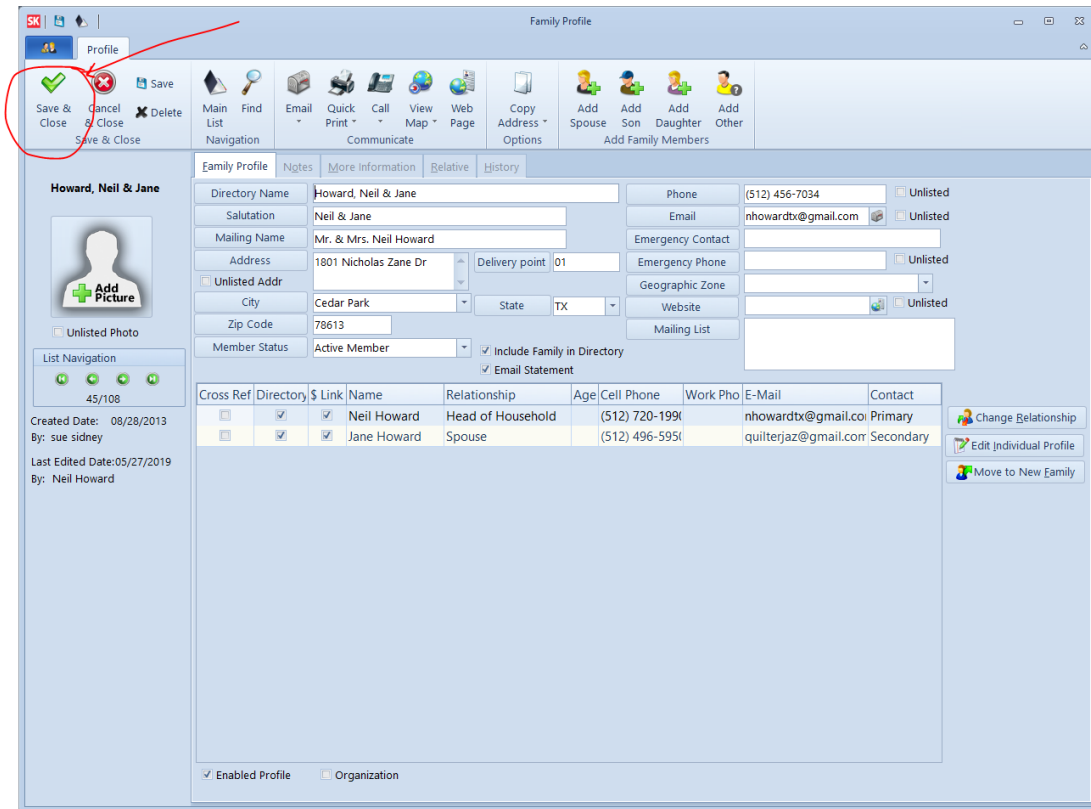
45/108

Enabled Profile Organization

5. Put a check in the box that says "Email Statement."



Click on Save and Close to save the data.



The person's name will now be picked up in the group to which quarterly giving statements will be emailed.

You can now exit Membership Manager.