

DESK REFERENCE | STEP by STEP HELP | EASY INSTRUCTIONS

WRITTEN IN EVERYDAY LANGUAGE SO
ANYONE CAN UNDERSTAND
SK GUIDEBOOK

The Servant Keeper Guidebook will make sure you, your staff and volunteers never get stuck!

Complete with step by step instructions, this handy reference comes loaded with tips and illustrations to walk you through all of the features. You'll love the convenient spiral bound format so the book easily lies flat, as well as the large easy to read text.

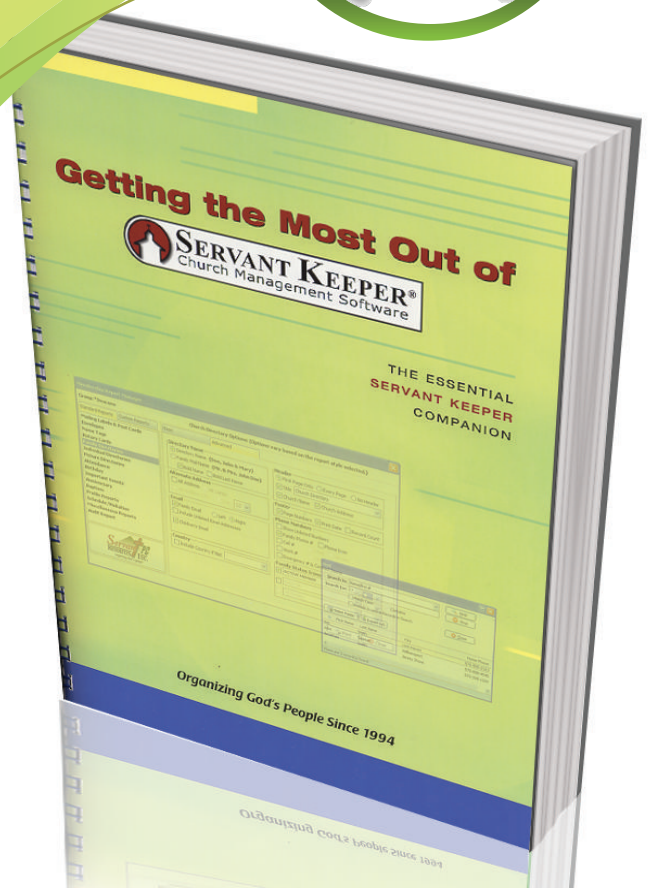
“WE LOVE THE GUIDEBOOK BECAUSE IT’S WRITTEN FOR EVERYDAY USERS, NOT COMPUTER PROFESSIONALS. IT USES TERMINOLOGY AND WORDING THAT IS EASY TO FOLLOW AND UNDERSTAND, AND ACTUALLY HELPS US GET THINGS DONE!”

JANE S. - SERVANT KEEPER USER

CONTACT A REPRESENTATIVE TODAY:
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The Essential Servant Keeper Companion solution is a helpful guidebook on how to get the most out of your Servant Keeper Church Management Software. Perfect for new staff members or volunteers or anyone who needs a step by step guide for any process in the program.



How do I add a new Individual?



This section of the Chapter will walk you through filling in a New Individual Profile. You can use either the <Enter> or <Tab> key to move from field to field. If you prefer to use the <Tab> key, where you see <Enter> just use the <Tab> key instead.

Remember, if you miss a field, or need to go back a field, you can use the <Shift>+<Tab> keys to go back a field.



1. Press the **[Add]** Icon on the Tool Bar.
2. This will open a blank Individual Profile window.
3. The focus of your cursor is in the First Name field to begin.

- a. If you need to change the Title and/or Gender use the <Shift>+<Tab> keys to move your cursor backwards or just click in the field using your mouse.
 - b. In the Title Drop Down List you can either type in a new Title or select one from the Drop Down List already in your system. Remember the Title Drop Down List is a quick fill field.
 - c. Pressing the <Enter> key will move you to the Gender field.
 - d. You can only select one of the items in the Gender Drop Down List, this is the only Drop Down List that is NOT a quick fill field.
 - e. Pressing the <Enter> key will move you to the First Name field
4. Type in the individual's First name, in the First Name field. You will notice that the Preferred Name and Salutation fields are automatically filled in for you.

First Name	William	Middle Name	
Last Name		Suffix	
Preferred Name	William	Salutation	William

5. Pressing the <Enter> key will move you to the Middle Name field (if not disabled in the System Preferences, see chapter 4, page 38).
 - a. Type in the Middle Name or Initial or just leave it blank if no middle name is known.
6. Pressing the <Enter> key will move you to the Last Name field.
7. Type in the Last Name (up to 30 Characters).

First Name	William	Middle Name	
Last Name	Wonka	Suffix	
Preferred Name	William	Salutation	William

8. Pressing the <Enter> key will move you to the Suffix field.
9. Type in the Suffix of the individual or leave it blank if there is no Suffix. (Suffix are primarily for males, they can be things like Sr., Jr., II, III, etc.)
10. Pressing the <Enter> key will move you to the Preferred name field.