

Exporting from Servant Keeper

Export People

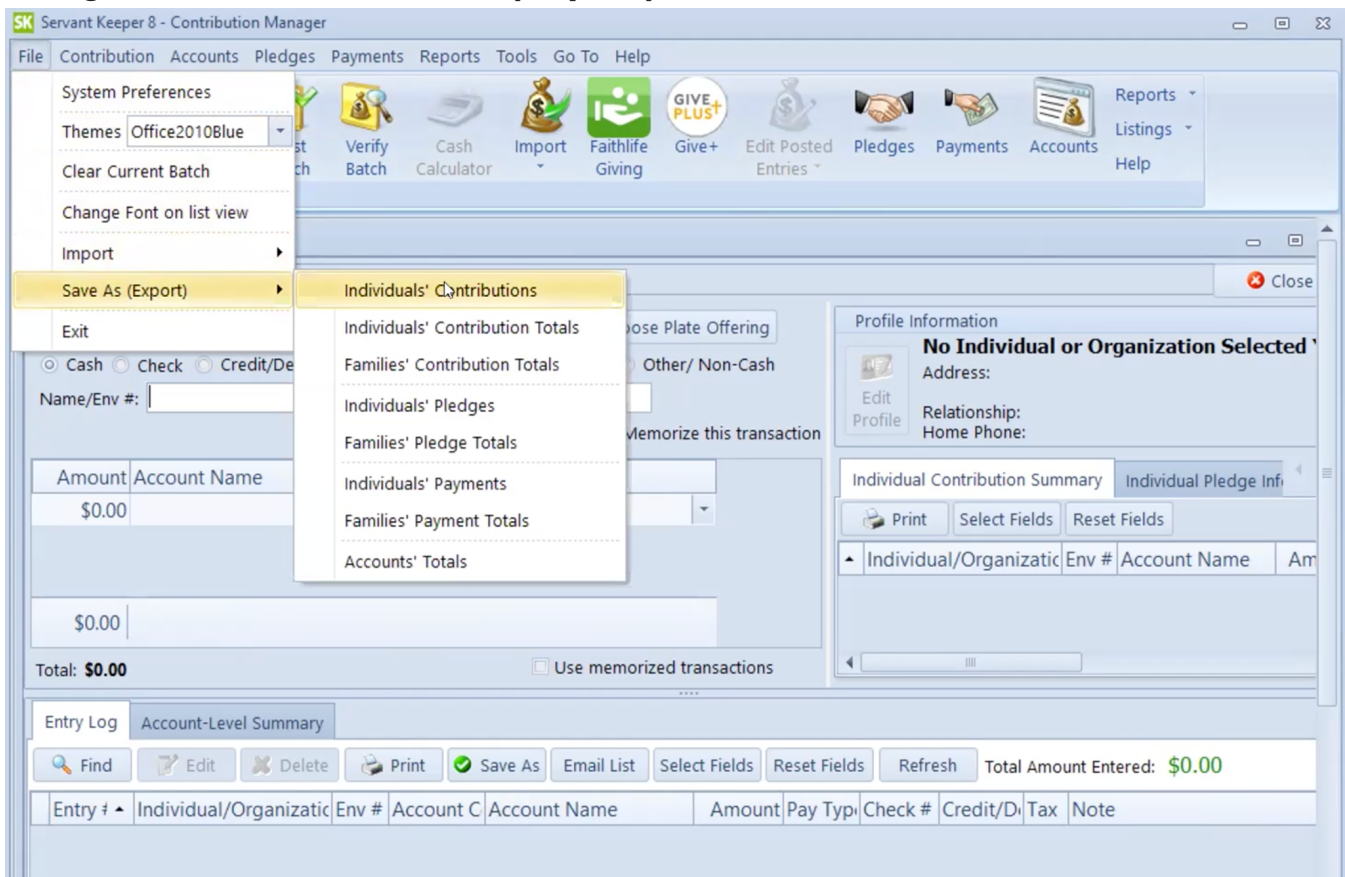
Membership Manager.

1. Within Servant Keeper, navigate to **Group -> Add Group -> Selections and Lists.**
2. This brings up the Add/Edit Group window.
3. Call the report "Individual Export" or something similar.
4. Check list the search results using **Individuals** (not families).
 - a. Select a field to search: use **Individual ID.**
 - b. Select how to search the field: **Is not Blank.**
 - c. Enter the item to search for: leave this field blank.
 - d. **Add Criteria [+ Add]** (click the add button).
5. Click **Select Fields** button. This is where you select the fields to import.
 - a. Under 'Select Fields to Display', choose **Individual Fields.**
 - b. **Select all** of the Individual fields
 - c. Click the **Save** button.
6. Click the **Save** button.
7. You are now back at the Group Keeper main menu.
8. **Double Click** the report "Individual Export". This will bring up the preview.
9. Click **Save As -> Excel Spreadsheet.**
 - a. Choose an easy-to-access place to save the file (we recommend "Desktop"). You may have to name the file again as "Individual Export".

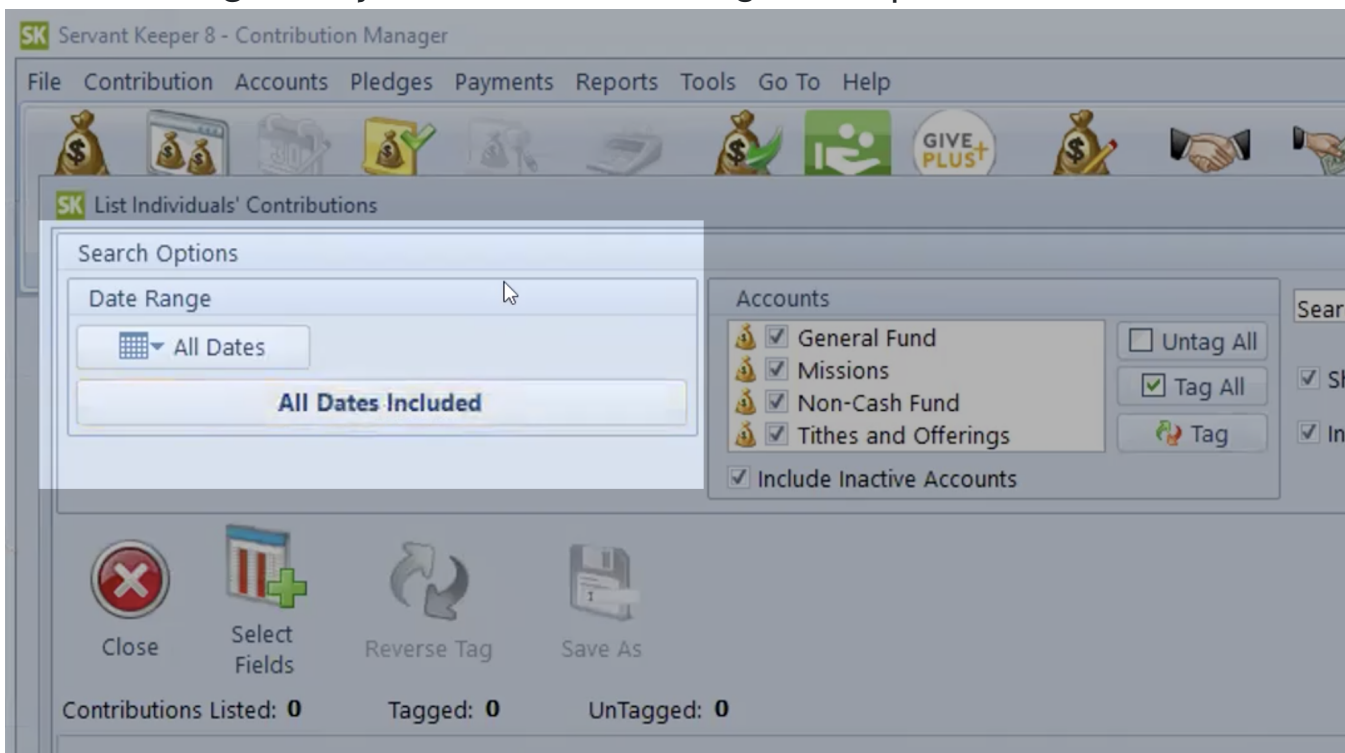
Export Giving

1. Within Servant Keeper, open up Contribution Manager.

2. Navigate to **File -> Save As (Export) -> Individual Contributions**.



3. In **Date Range**, set your desired date range for export.



4. In **Accounts**, Click **Tag All** and check **Include Inactive Accounts**.

The screenshot shows the 'List Individuals' Contributions' window. The 'Accounts' dialog box is open, displaying a list of accounts with checkboxes: General Fund, Missions, Non-Cash Fund, and Tithes and Offerings. The 'Include Inactive Accounts' checkbox is checked. The 'Tag All' button is highlighted. The 'Date Range' section shows 'All Dates Included'. The 'Search for Individuals' dropdown is set to 'All'. The 'Show Split Transaction Detail' and 'Include Deleted Individuals' checkboxes are checked. The 'Contributions Listed: 0', 'Tagged: 0', and 'UnTagged: 0' status is shown. The table header includes 'Tag', 'Last Name', 'First Name', 'Family ID', 'Address', 'E-Mail', and 'Individual ID'. The table body is empty, displaying '<No data to display>'. The 'Close', 'Select Fields', 'Reverse Tag', and 'Save As' buttons are visible at the bottom.

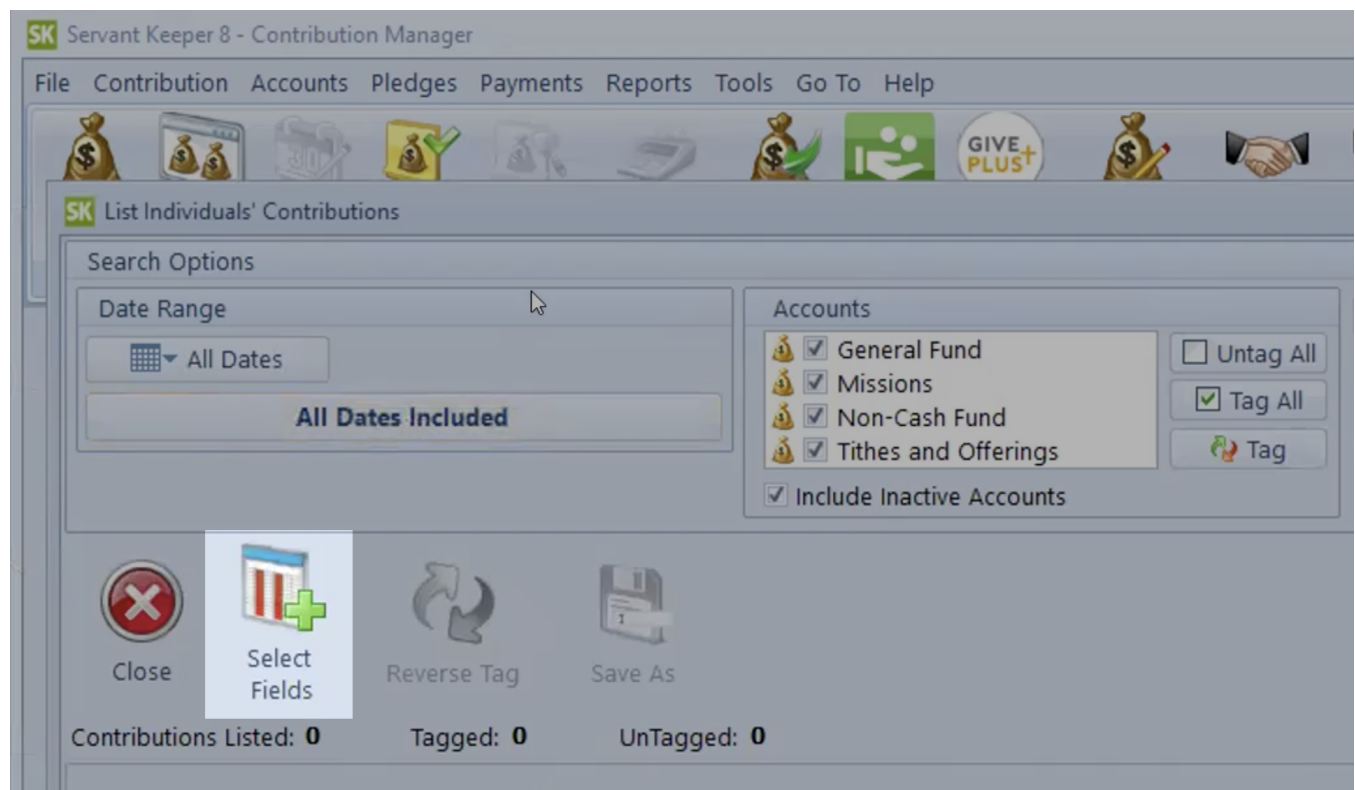
Tag	Last Name	First Name	Family ID	Address	E-Mail	Individual ID
<No data to display>						

5. Check **Show Split Trans Detail** and **Include Deleted Individuals**.

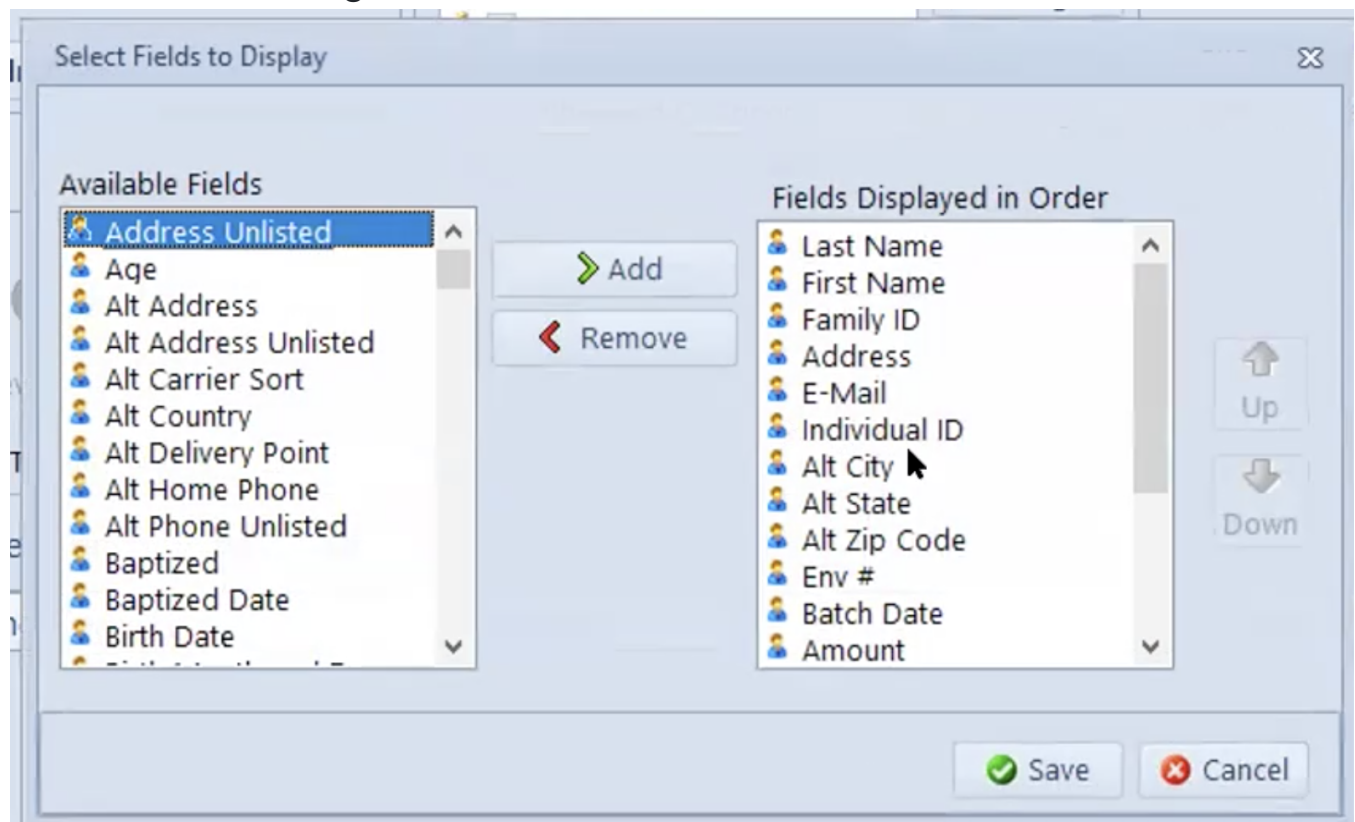
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Tag	Last Name	First Name	Family ID	Address	E-Mail	Individual ID
<No data to display>						

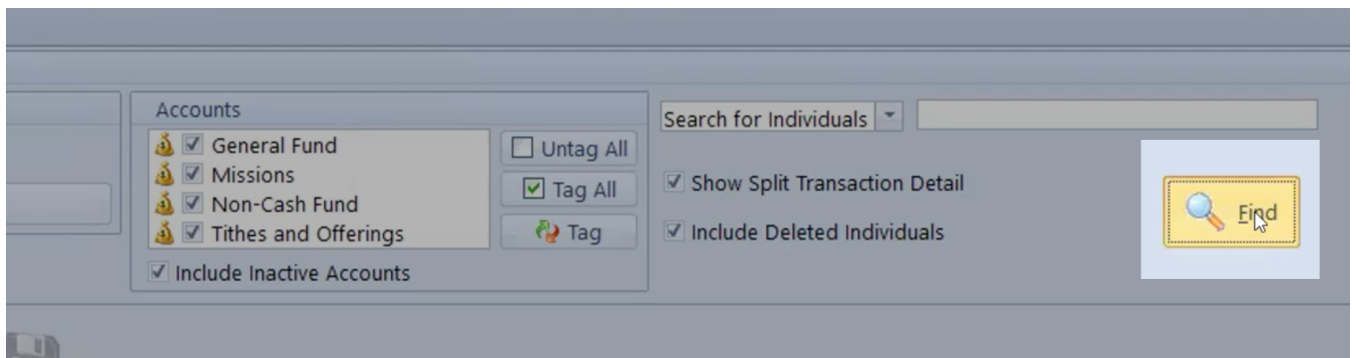
6. Click **Select Fields**.



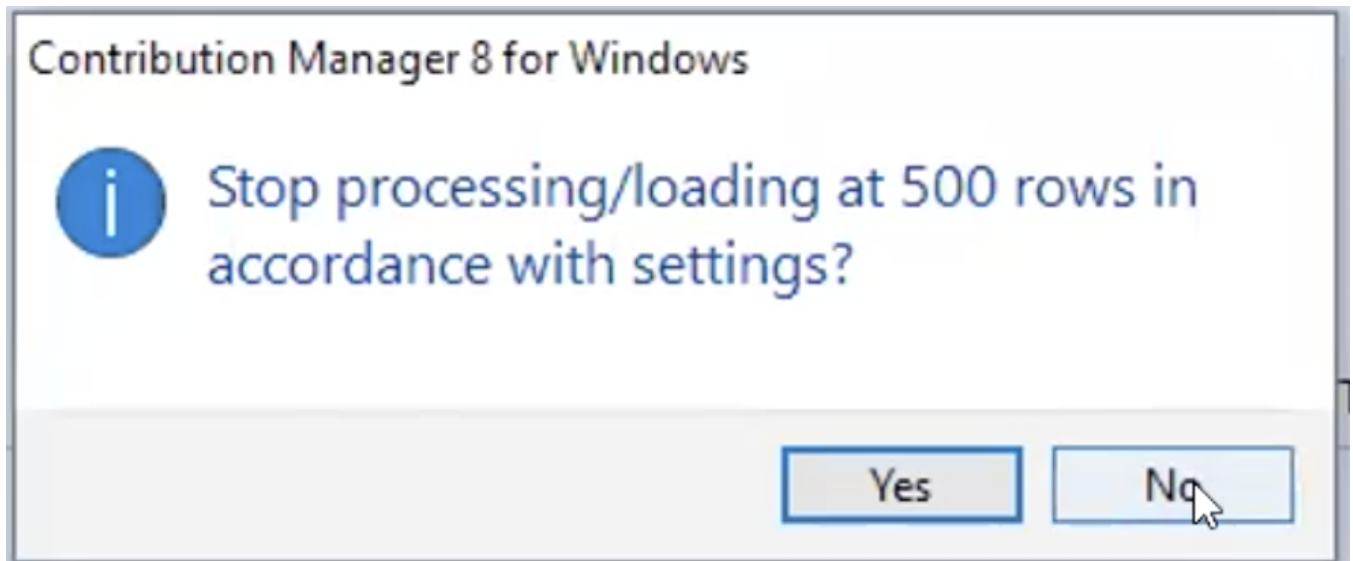
7. Select the Following Fields.



- a. Select **Individual ID**
 - b. Select **Family ID**
 - c. Select **Last Name**
 - d. Select **First Name**
 - e. Select **Address**
 - f. Select **E-Mail**
 - g. Select **Env#**
 - h. Select **Batch Date**
 - i. Select **Amount**
 - j. Select **Pay Type**
 - k. Select **Account Name**
 - l. Select **Tax**
 - m. Select **Check#**
 - n. Select **Note**
 - o. Select **Created Date**
 - p. Click **Save**.
8. Click the **Find** button.

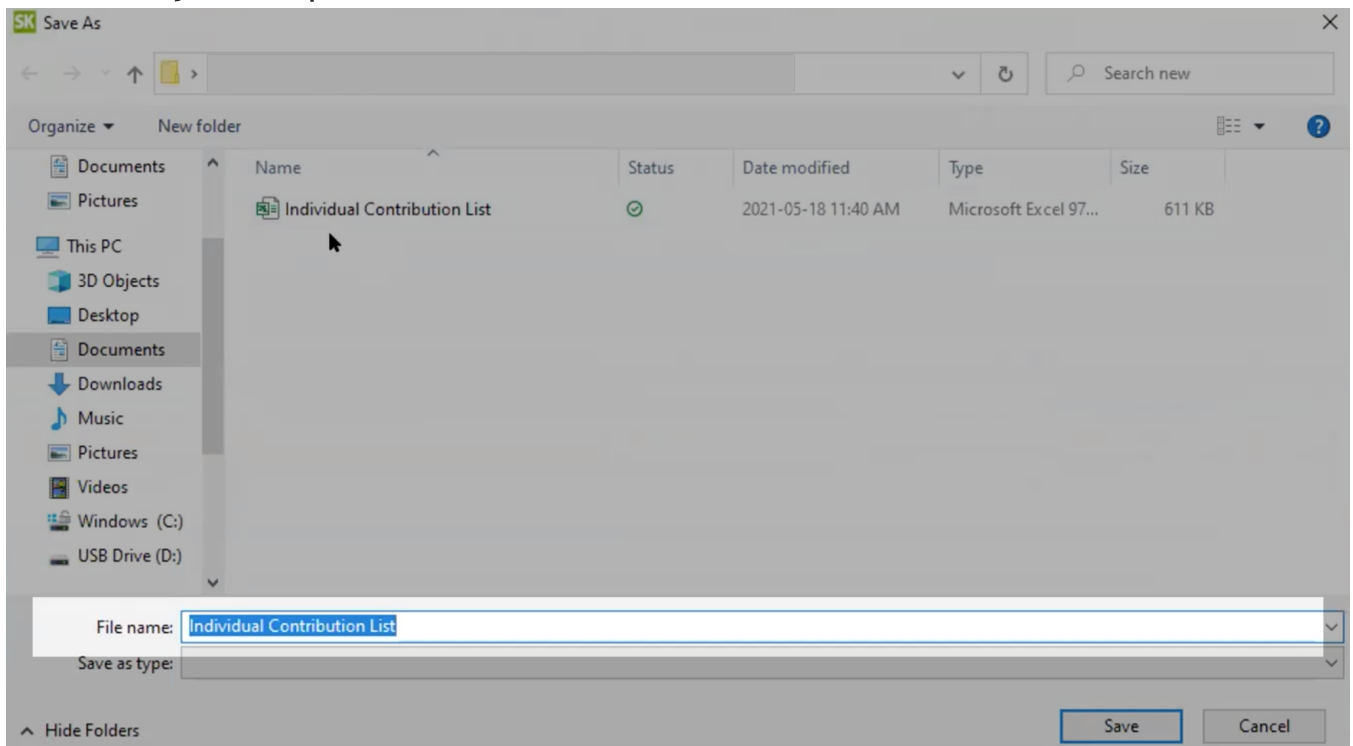


9. You'll be asked about stopping at 500 rows, click **No**.



10. Click **Save As -> Microsoft Excel**.

11. **Name** your Export.



Export Groups

Groups Keeper (on main page)

