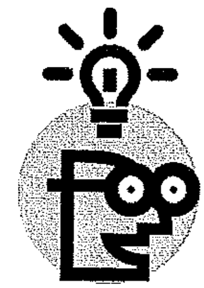
Tips and Tricks from the Help Desk



Keyboard Shortcuts

- <F2> - Clears out any date or phone number field.
- <F3> - Insert today's date, and the <F4> key to open up the calendar.
- <CTRL>+<F> - Brings up the Find window (Same as Magnifying Glass icon). You can search by Last Name (characters by themselves), First Name (characters followed by a space) or First and Last Name (characters of First and Last Name separated by a space.)
- Combine the **<ALT>** key and **<u>underlined</u>** menu items: Press and hold the **<ALT>** key and press the <u>Underlined letter</u> to instantly access tabs or menu items. Example: From the Main List press and hold the **<ALT>** key and the letter **<G>**, then **<O>** to open the Groups Keeper. Another Example, Go into an Individual's Profile and press the **<ALT>** key and the letter **<A>** to switch to the Attributes Tab.

Mouse Tips and Tricks

- Use **graphical calendar** for easy date selection. *Double-click* any date field to bring up calendar and select date or by clicking on the date icon to the right of any date field.
- To **Add, Update, or Delete any item in a drop down list**, just *Right-click* the connecting down arrow. Also you can add new values to the master list on the fly (if you have the security rights) by typing the new values right into the field.
- From the Main List, you can **print profile reports** by *Right-clicking* on any individual or family name and selecting **Quick Print | Profile Report**.
- To modify **Individual Attributes**, you can either *Double-click* or *Right-click* to open the selected attribute box.
- Most of the **Field labels can be changed by** simply *Right-clicking* on the label, then select Change Field Name...
- Most Profile Fields, Individual or Family, can be searched by *Left-clicking* on the label.
- To **Email an individual or a family**, open their Profile and *Left-click* the **[Send Email]** button beside their email address field. Or from the Main List, highlight the Individual or Family record and press the **[Send Email]** button on the Button Bar, this will send to the primary email address.
- You now have 3 Individual and 2 Family email addresses to put emails in. ***NOTE:*** *Unlike Version 5, Version 6 allows you to email to any email package you can set as your default email program in your Internet Explorer.*

Groups Keeper Tips - for getting the most out of this awesome feature.

- Groups Keeper allows you to create '*<u>Complex Boolean Queries</u>*' with lookups that mix '**AND**' and '**OR**' search criteria. When creating a complex query, you can use the **parentheses** to guide the logic of your search. If no parentheses are used the program will follow standard algebraic logic and perform the '**AND**' conditions first, then the '**OR**' conditions.
- You can **resize the columns** by placing your mouse over the **vertical line** between the column headings and hold down your left mouse button to drag the column to the appropriate size. You might need to use this when you use the **[Print]** button to see all the data.
- Have you ever brought up a group and only wanted to see some of the items listed? Un-tag those not wanted, *Right-Click* in the Group View and select <u>View Tagged | Untagged, then Tagged</u> to see only the tagged lines.
- You can globally assign a value to a group by clicking the **[Advanced]** Button and selecting the **<u>Globally Change Fields...</u>** This function can be a time saver when a mass change is necessary, but you definitely want to be sure of the column you are changing.
- Has there ever been a time when you needed to save a group list but didn't want to print it out? Click on the **[Options]** Button and select **<u>Save Group to a List</u>**. This will save what you are viewing to a Static Group List, denoted by the *<u>Page Icon</u>* on the Groups Keeper List.

Administration Tips - to help keep your database running smoothly.

- It is recommended that you run ***Optimize Database*** at least once a week. Run your **Administration Manager** module and select the **4th icon** in from the left. If you are on a network version, everybody will need to be off the system to run this task. A good rule of thumb is, the more data you enter or modify, the more often you will want to run ***Optimize Database.***
- One of the hardest things to do in tech support is to inform a customer that their data is lost. I can tell you from experience that **hard-drives do crash.** The only **effective defense** is to restore the data from a **recent backup.** The backup and restore utilities in Administration Manager make this process quick and easy.
- **Rotate Your Backup Disks.** You should have at least *One disk per week* (Labeled Week 1, Week 2, Week 3, Week 4, and Week 5). Also remember when you enter in a significant amount of data you should backup.
- **DO NOT** use a floppy disk for more than **ONE YEAR**. If a floppy disk is older than one year, **REPLACE IT.**
- If new records and updates are not showing in groups and reports, make sure to *do* ***Optimize Database.***

Contribution Tips

- **To Move Contributions from one person to another**
  1. **Move Posted Contributions**, under the **Contribution** menu.
  2. Search for the Individual you wish to move the contributions from. Type in their name and click on the **[Find]** button. *NOTE: Make sure you check the date range to include all contributions.*
  3. Tag the contributions to move. Pressing the **[Tag All]** button will tag every contribution.
  4. Select the **[Move Contributions]** button.
  5. In the Search and Select an Individual to Move Tagged Items to, type in their name and click on the **[Find]** button. Then Highlight the individual and click on the **[Select]** button.
  6. You are given a final chance to verify the correct "Move To" Individual. Check the *Yes, I want to move the contributions* checkbox and click on the **[Confirm]** button.
  7. Press <Enter> or Click the **[OK]** button. Now all the tagged contributions have been moved.
- **To Merge Contributions from one account into another.**
  1. From the **Accounts** menu and select **Merge Accounts**
  2. Select the account you want to move from
  3. Select the account you want to merge the contributions into.
  4. Choose either *Selected Contributions to Merge* or *Merge All Contributions*.
- You can have **Group Accounts** and under each *Group Account* you have **Sub-Accounts**. You can **drag-and-drop** existing accounts into a *Group Account* on the **Account Setup** screen. ***Not to worry***, all the *contributions and pledge information* will follow the moved account.
- **Reminder:** To remove an entry from your *Contribution Entry Log*, *Right-click* on the line item and select **Delete Selected Contribution** or just highlight the item and press the **[Delete]** button.
- Under the **File** Menu, **System Preferences**, on the **Entry Tab**, you can set the ***Default Cash/Check/Credit Card Account*** and a ***Default Non-Cash/Other Account*** for the initial contribution entry.

Miscellaneous Tips

- Be sure to check out the **Knowledgebase** and **User-to-User forum** located at **http://www.servantpc.com**.
- On the Homepage are Tech Support quick links off to the right side. Click on the **Support** link for the **Tech Support Homepage.**
- To change any heading in the Attributes area, go to the **Edit menu** and select the **Modify Profile Tab/Attribute Labels** option.
- When making a letter template in **SK Writer**, make sure you **insert** the **End of Document Merge Break** at the end of your document.