Servant Keeper Customers

Select in this sequence for your export group: (one time setup)

> Env #
> Blank or Extra Field 1
> Salutation (Bob & Jane) (this may be marked as Family Salutation)
> Last Name
> Address 1
> Address 2
> City
> State
> Zip Code

***Helpful Hint: On the member page, if you change one of the tabs that isn't being used to read "Blank", you will not need to manipulate the file after it is exported. To do this, on the report used to produce the envelope list add the column "blank" or "Extra Field 1" in the sequence for export group after Envelope Number.

Be sure to **save** the new export if you made changes.

Continue to export the file as shown below:

File Export Steps
1) If you use the Groups feature, select the Group for offering envelopes.
2) All envelope numbers
3) Options
4) Choose "Export".
5) Text file (*.csv, *.txt)
6) Export Group
    a. Save in Servant Keeper 6
    b. Should see filename – highlight and it will appear in box below.
7) Click Save

We suggest that the file is named as: 123456_12345. (First 6 digits are your account number and next 5 digits are your order number) If you do not know what these numbers are, please feel free to contact us and we will be happy to provide this information to you.

Once the file is exported the following steps need to be done:
- Open Excel
- File
    o Open

- - Look In: (where ever the file is saved to)
    - Make sure that File of Type is All Files
- Choose new file that was created
- Text wizard should appear (If this doesn't appear, skip to next step and continue to follow instructions below.)
  - Make sure that delimited is selected
  - Next
  - Choose Comma and unselect Tab
  - Finished

Skip next step of adding an extra column if you followed helpful hint above
- Once file opens in Excel
  - Click on the "B" and this will highlight the entire column
  - Choose Insert
  - Column (this should insert a blank column after the envelope number)
- File
  - Save As
  - Filename: 123456_12345.csv
  - Save as type: CSV (comma delimited) (*.csv)
  - Save
- If asked about it not being compatible with comma delimited, you can say YES
- Close file
  - If prompted to save again, you can say NO
- Open email
  - send file to envprocessing@osv.com
  - Be sure to use both account number and order(list) number in the subject of your email
  - Please identify the parish and any contact information in the body of the email
- Be sure that you are selecting the file named 123456_12345.**csv**
- Send email

*** Please be sure that you file matches one of the 3 file format standards found on our website. This file should look like the .CSV or the Excel, depending on how you have the file saved.