Servant Keeper Customers

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

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

****Helpful Hint: On my member page I changed one of the tabs that I wasn't using to read "Blank". Then on the report I use to produce my envelope list I added the column "blank" in the sequence for my export group after Envelope Number. This is a one-time change.*

By doing this I avoid the entire step of opening the file and adding the blank column on the report before I send it. This will make it much easier and faster. The blank column is permanently there just like the other information.

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

Continue to export the file like normal. (see 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
    - 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
- 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.