# SERVANT KEEPER 7 IMPORT PROCESS

Pre-Import Steps

1 In the WeShare **Control Panel**, click on the **Manage Giving Opportunities** icon and any **Manage Collection** button. Then click the **Collection Details** icon.

2 In the **Servant Keeper Account** box, enter the Servant Keeper Account Name that corresponds to that collection. Click **OK** to save. Repeat this process for each collection.

3 In the WeShare **Control Panel**, click on the **Manage Users** icon and then on any individual donor name missing an **Envelope ID** number. Navigate to the **Giving Account Settings** tab.

4 In the WeShare **Envelope ID** field, enter the **Envelope Number** for the parishioner. Repeat this process for every donor.

Preparing the WeShare Export File & Importing

1 Go to the WeShare **Control Panel**, click on the **Reports & History** icon. Select from either the **Transfer Reports** (to import each deposit separately) or the **Financial Export** (to import multiple deposits grouped by date range) icon.

**2** Choose the report you want to import and select the **Servant Keeper Export CSV**.
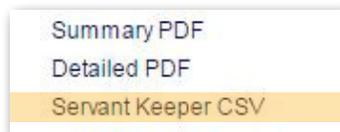
3 You will then be promted to **Save** the file. Save it into a folder on your computer that will be easy for you to find later. Create WeShare folder if needed.
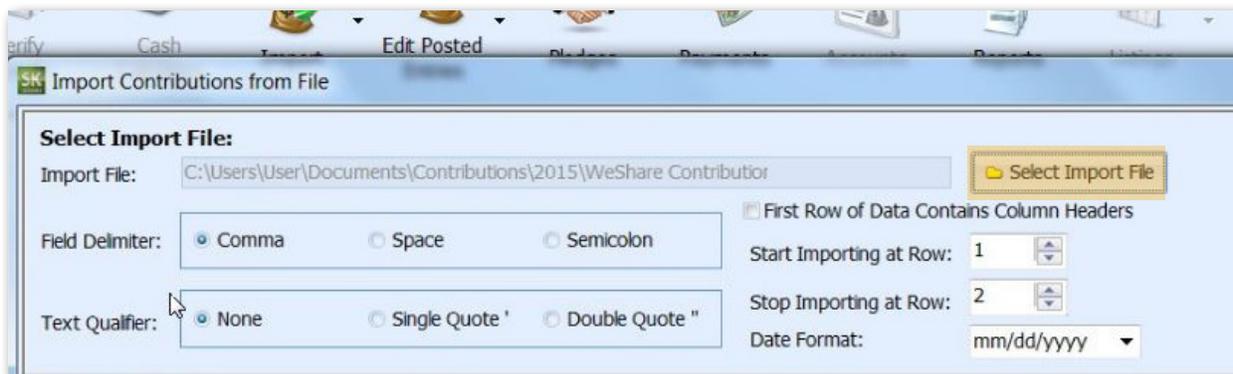
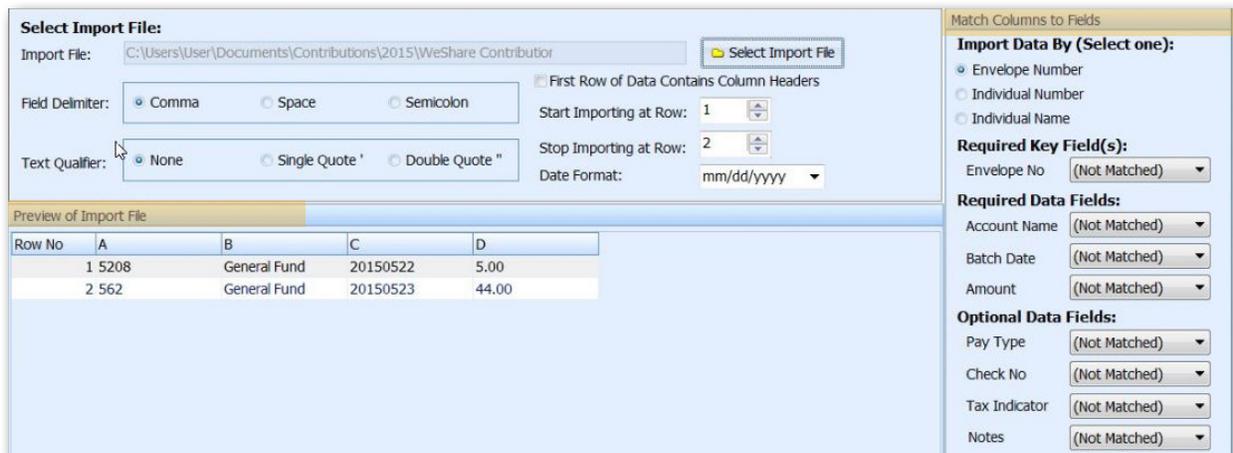**4** Once the file is saved, open **Servant Keeper.**

5 Click on the drop-down arrow next to the **Import** icon and select **Import Contributions from File**.
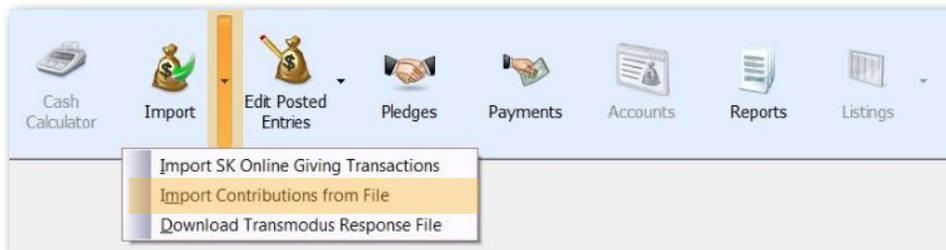
6 On the right of the **Import File** box, click **Select Import File** button, locate the Servant Keeper CSV file you previously saved, and click **Open**.

7 You will now see a Preview of Import File and you will need to **Match Columns to Field**.

8 **Import Data** should be set to <u>Envelope Number</u>.
   Required Key Field(s):
      <u>Envelope No</u> - Click drop-down and select <u>A</u>.
   Required Data Fields:
      <u>Account Name</u> - Click drop-down and select <u>B</u>.
      <u>Batch Date</u> - Click drop-down and select <u>C</u>.
      <u>Amount</u> - Click drop-down and select <u>D</u>.
   Optional Data Fields: Leave (Not Matched).

Note: *Once you have Matched the Columns to Field, click <u>Save File Layout</u>.*
This should save them as preferences so you do not have to match the columns for every import.

Once you have Matched the Columns to Field click **Next** at the bottom right of the screen.

9 On the Map to Proper Batches screen, click **Next** at the bottom right of the screen.

11 On the Import Status screen, click the box on the bottom left next to **Yes, I want to import the contributions.** Then click the **Import** button.

Import Contributions to Database:

ℹ Are you sure you want to import contributions from the selected file?

If you continue all contributions in the selected file will be imported and saved to to your database.

Import Status:

Total Number of Contributions on the Import File:	2
Total Amount of Contributions on the Import File:	$49.00
Number of Contributions Imported Successfully:	_____
Total Amount of Contributions Imported Successfully:	_____
Number of Contributions Rejected to the Reject File:	_____
Total Amount of Contributions Rejected to the Reject File:	_____

☑ Yes, I want to import the contributions.   < Back   ⏵ Import   ❌ Close

12 Once the import is completed, click **Done**. You will then receive a message that all entries have been successfully imported to the system.

Import Status:

Total Number of Contributions on the Impo	
Total Amount of Contributions on the Impo	
Number of Contributions Imported Succes	
Total Amount of Contributions Imported S	
Number of Contributions Rejected to the Reject File:	0
Total Amount of Contributions Rejected to the Reject File:	$0.00

Contribution Manager 7 for Windows

ℹ All 133 entries have been successfully imported to the system.

OK

❌ Done

Note: *Now that the entries are imported, you will need to* <u>Post the Batch</u>.