

Servant Keeper Offsite Contributions

Congratulations on purchasing the Servant Keeper Offsite Contributions program.

This optional Module has been designed to allow the flexibility and capability of having staff members add or modify Contributions transactions and accounts at home, work or another PC; and then copy those contribution changes back to the Main Church PC.

This program was designed for contribution data changes and additions only. All changes needed on membership information should be done on the Host Computer as they will not be included in restore to the Host Computer.

You need to have a good understanding of the following terminology

Host computer: The **Host computer** is your main computer. For instance, you have a computer at the church but want to do your contribution entry at home on your home computer. The **Host computer** would be your church computer.

Remote computer: The **Remote computer** is the computer you want to do your contribution entry on that is not the church computer (or **Host computer**). In the above for instance, the **Remote computer** would be your home computer.

Check Out data to Offsite: This process is complete backup of your Servant Keeper database and prevents you from making any changes in the Contribution Manager of the Host computer until database is checked back in.

Check In data from Host: This process does a complete restore of the Member and Contribution database that was checked out from the Host computer.

Check Out data To Host: This process does a check out (backup) of the contribution database information only. It also includes any new individuals entered during the Contribution Entry process.

Check In data from Offsite: This process checks in the contribution changes to the Host Computer from the changes made at the Remote Computer. It also adds new individuals entered on the Host computer during the Contribution Entry.

The first time you begin the checkout/checkin process you must begin by checking out the database from the **Remote computer**.

The following are step by step instructions on how to use this exciting new program!!

Offsite Contribution Help Sheet

When you have contribution data on two non-networked computers the first step in using this tool is to get the HOST computer up to date with the REMOTE computers contribution information. If there are any contribution entries on the HOST computer, they will be overwritten!!

The Help Desk recommends doing a backup on the Host and Remote computers before beginning this process.

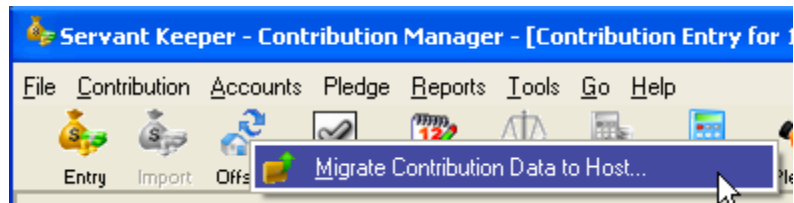
Migrating the Remote Computer Contributions to the Host Computer

1. Open the Contribution Manager on the Remote computer.

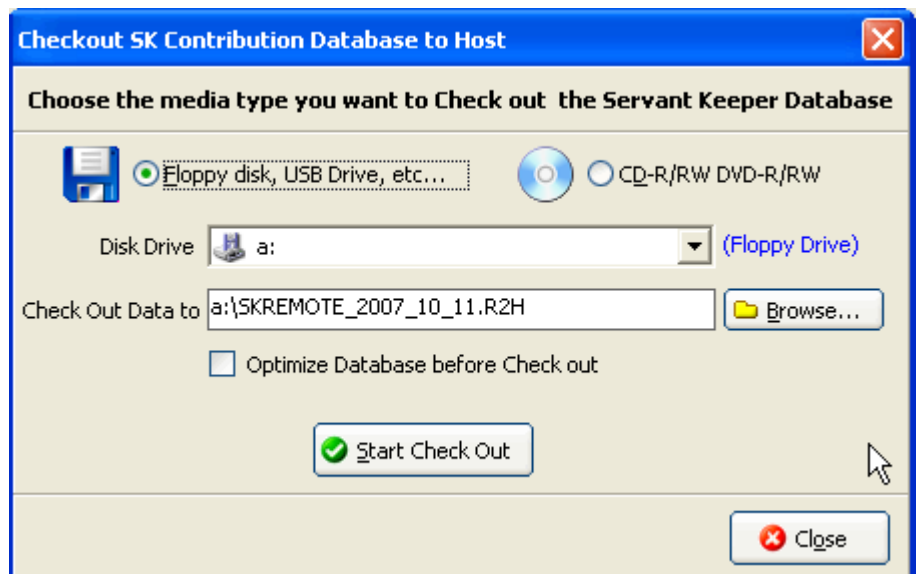
2. Click the **[Offsite]** button.



3. Click **[Migrate Contribution data to Host..]**

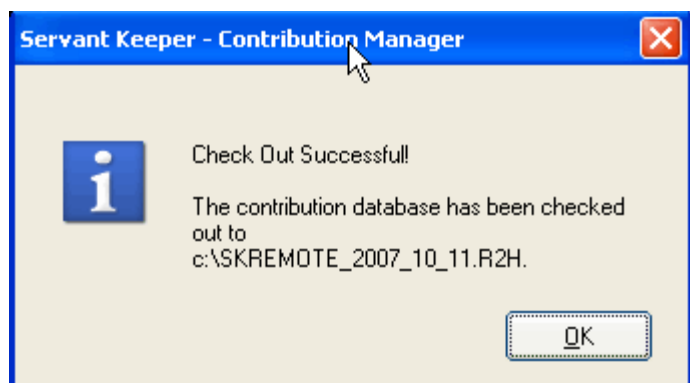


4. Choose where you want the file to be saved. Click the **[Start Checkout]** button.



Note: We recommend not changing the backup file name and checking the Optimize Database before clicking Check Out.

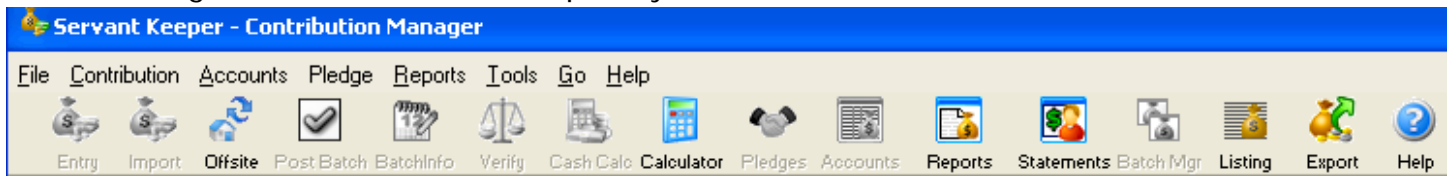
5. When the Check Out process completes you will see the location where you saved the check out file. Click **[Ok]**.



You are now ready to take the Remote data and migrate it to the Host computer.

Note: Once data is checked out from the Remote computer no contribution changes can be made on the Remote computer until the Host data has been checked back in.

After checking out data to the host computer your contribution icons will look like this:



The Entry, Post Batch, Batch Info, Verify, Cash Calculator, Pledges, Accounts and Batch Manager buttons will be grayed out and not be able to be used. Only reports and listing features can be used check data is checked out.

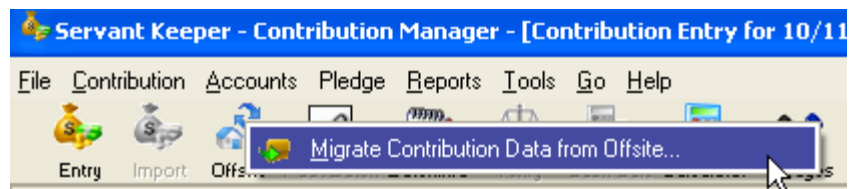
Migrating data from Remote computer to Host computer

1. Open the Contribution Manager on the Host computer.

2. Click the **[Offsite]** button.

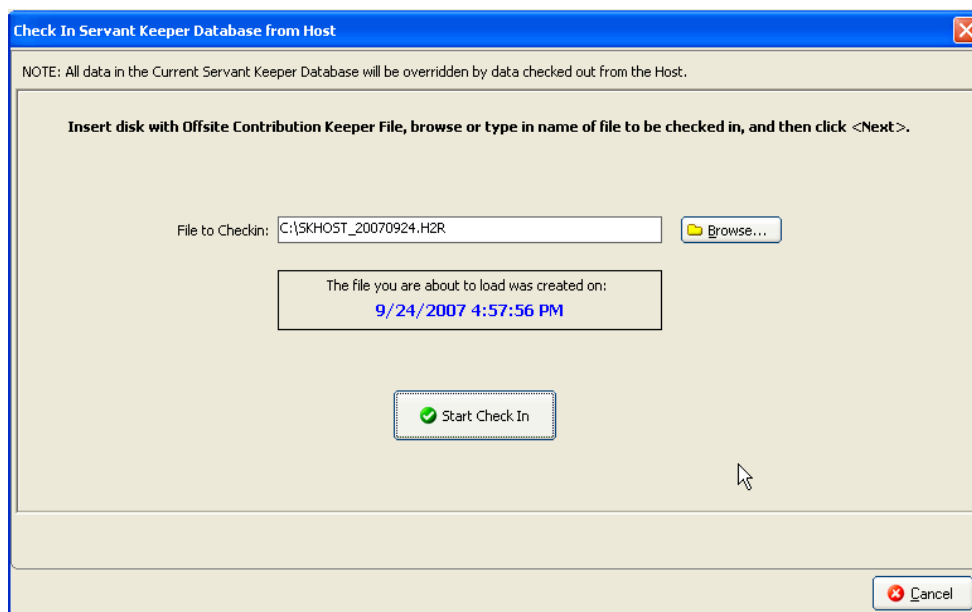


3. Click on the **[Migrate Contribution Data from Offsite...]**

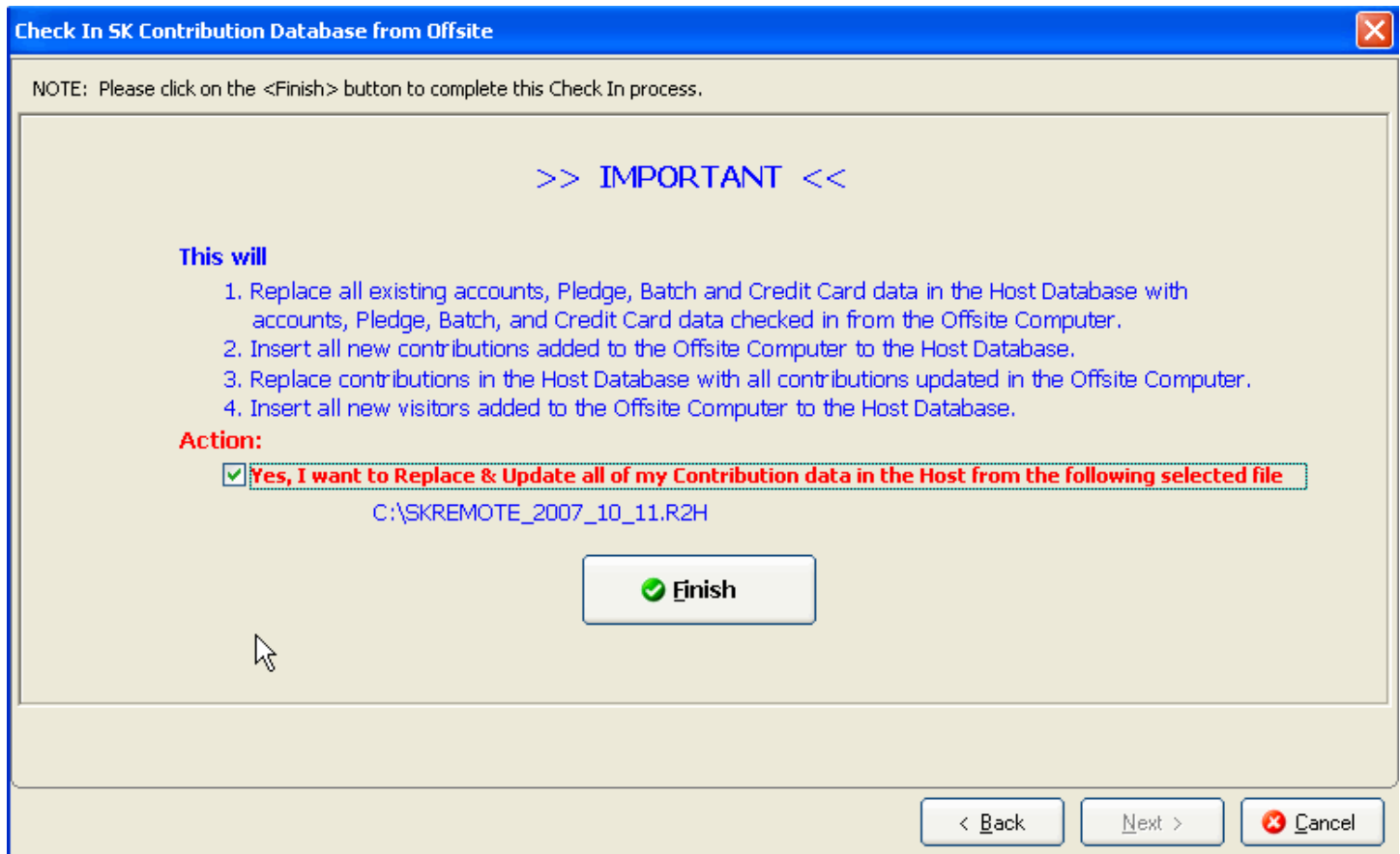


4. Choose the file to check it into the Host computer by clicking **[Browse...]** and finding the checked out file.

5. Once the file is selected click the **[Start Check In]** button.

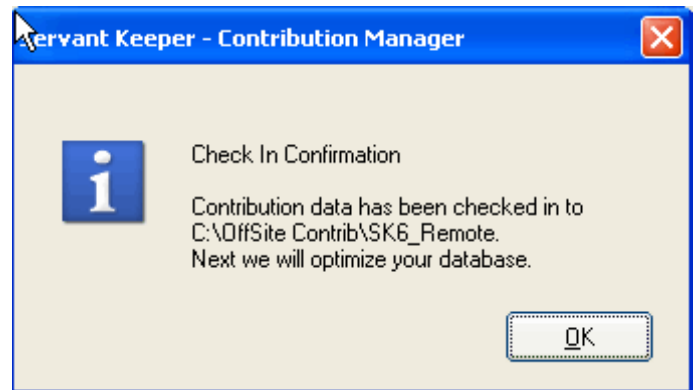


Note: When checking data into the Host computer all contribution data entered on the Host computer is overwritten with the contribution data and new individuals that you are checking in.



6. Once the Check In process is complete click **[OK]** to optimize the database files.

7. Once the database is optimized click the **[OK]**.



Now both the Host and Remote computers have the same data. You are now ready to **Check Out** the data from the Host Computer so you can take it back to the Remote Computer and begin entering your contributions. Now the Check In/ Check Out procedure will be in place and ready to use.

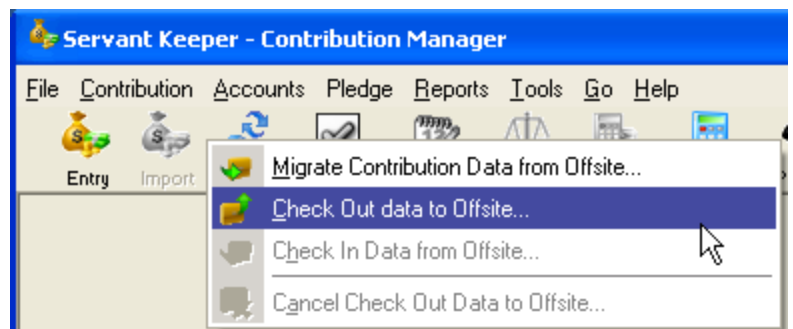
Checking Out Data To Remote Computer

1. Open the Contribution Manager on the Host computer.

2. Click the **[Offsite]** button.



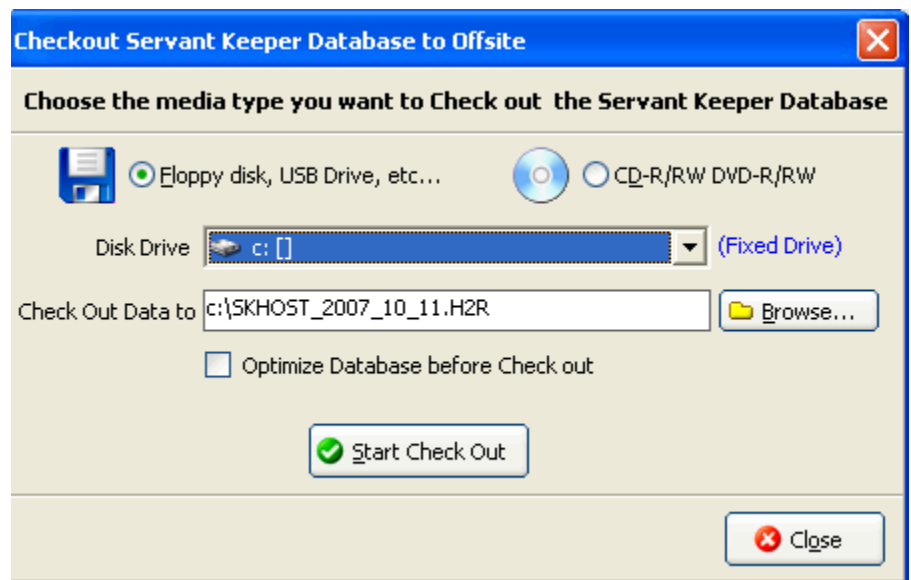
3. Click on **[Check Out Data to Offsite]**



4. Choose the location where you want to save the checked out file.

5. Click the **[Start Checkout]** button.

6. Once the Check out process is complete you are ready to take your Remote Computer check out file back to the Host computer and check it in.



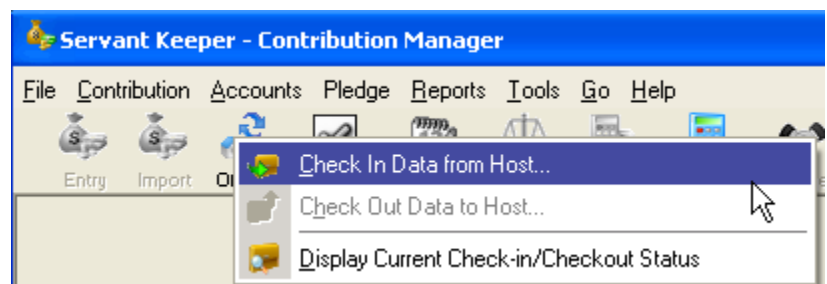
Checking In Data From Host Computer

1. Open the Contribution Manager on the Remote Computer.

2. Click the **[Offsite]** button.



3. Click **[Check in Data from Host]**



- c. If you want to move the contribution transactions from this person to an existing individual that has the same name select "Move Contribution Transactions to the tagged Individual"

Fix Duplicated Individual's Name/Envelope # ✖

Individual in Remote Site Found Duplicated Name and/or Env # in Host

Name (Last, First): Arnold, James Envelope #:
Address: , , Home Phone: - -

Error Found: Duplicate Individual Name Found

Take One of the Actions to Resolve the Duplication Issue

Add as a new Individual

Re-Assign Envelope # to:

Move Contribution Transactions to the tagged Individual

Tag	Individual Name	Env #	Address	Home Phone
<input type="checkbox"/>	Arnold, James	101	300 Front Street, Jersey Shore, PA 17740	717-748-9844