Servant Keeper Version 8 and higher

Link to support/online documentation requires username/pw of client

******support.servantpc.com/members/index.php?action=login

Account Set Up

Servant Keeper PMM Background Check Settings	23					
Update or change your PMM integra	tion settings below.					
Servant Keeper Customer ID:	If you do not know yo	our SK Customer ID,				
12345	please contact Serva	nt Keeper.				
You can find this information on your confire received when you registered. Confirmation Email Settings	nation email you					
Username:	The Username and Pa	assword are provided by	Protect My			
PDKeeper	Ministry and sent to	linistry and sent to you once your account has been set up.				
Password:			•			
Show Password I need to re	e-register!					
Email Address Used: © E-Mail © Email 2	🔘 Email 3					
Track interactions as Touch Points:	Off On					
	Save Cancel					

WARNING- Make sure Middle Name Field is enabled.

GO TO FILE>SYSTEM PREFERENCE AND TURN IT ON TO DISPLAY IF NOT CURRENTLY ENABLED!! In V8-middle name, complete address and email are required for ordering background checks.

File Tools Individual Family Group Reports Go To Help
System Preferences
Change Font on list view SK Email Attendance
Open Servant Keeper File Writer Writer
Themes Office2010Blue
Exit
Select Group Selected 💽 🗶 Clear List
Find Household

System Preferences 🛛 🕅									
<u>D</u> efaults	<u>A</u> ttendance	Miscellaneous Default Groups							
Default Profile Settings									
	City			-					
	State	▼ Zip Code							
🗆 Display	Carrier Sort		·						
Display Country									
	Area Code								
Use "and" in place of "&" in the directory name and salutation									
Display the Middle Name field on the individual profile									
Display the Maiden Name field on the individual profile Image: Display Delivery Point field on profiles Image: Display Delivery Point field on profiles									
Skip City and State while moving from field to field for auto zip code entry									
Start in the First Name field when creating a new profile									
			🕑 Save	Cancel					

ORDERING BACKGROUND CHECKS:

Servant Keeper has a menu option for Background Checks in the upper right hand corner of the applicant's profile:

9 Profile															~
🞸 🙆 🖻 s	Save		9		Ś				150		2				
Save & Cancel 🗶 🕻 Close & Close	Delete	Main F List	ind	Email	Quick Print ▼	Call	View Map *	Web Page	Schedule Appointmer	Copy at Addres	Backgr 5 * Che	ound ck			
Save & Close		Navigati	on			Cor	mmunicat	6			Options				
	r	<u>P</u> rofile	Alt	Addr/Phoi	ne <u>A</u> tt	tributes	Notes	Impo	rtant <u>E</u> vents	More Info	<u>O</u> verview	Atta <u>c</u> hment	<u>R</u> elative	Youth I	4 - F
Ann Snow Contributions/Pledge			ns/Pledges	Atte	ndance	Touch F	oints	Eventbrite	MailChimp						
Head of Household	Head of Household View Contributions View Pledges														
All Dates Included															

Clicking the Background Check tab will open a screen that warns the user of any missing information from the applicant's profile needed to process the order. These details must be entered before the check can be ordered.





Name: Ann Name error, make sure the individual has a middle name entered. Snow Birth Date: 10/10/1990 Missing SSN#. Please enter a Social Security Number before ordering a new check. Gender: Female Missing email address. This is a required field. Make sure the email chosen in the settings area is correct. Address: 14499 N Dale Mabry Hwy City: Tampa State: FL Zip: 33618 Once the missing information has been supplied, the user will notice the Start Background Check button is enabled.

Name: Ann SUSAN Snow Birth Date: 10/10/1990 Gender: Female Email: jfowler@protectmyministr Address: 14499 N Dale Mabry F	ry.com I wy	Settings
City: Tampa State: FL		
Zip: 33618		
Type of Package		
Basic Basic Control Contro Control Control Control Con	Social Security #	
O Plus	111111111 Criminal Search State County	Start Background Check
Motor Vehicle Report	State County	View Pricing and Options
O Credit Check	Drivers License # State Code	
© PA 153	Pick State Here	-
v1.0.0.0	Call 570-748-2800 for Support.	Close

**Clicking the "Start Background Check" button is like 'submit'. It will pop up a confirmation box to start the check and once they click 'yes', the order is sent. There is no further confirmation the check has been ordered-do not click the Start Background Check button a second time or you will be charged for a second order.

Once the order has been submitted the status will be displayed for that applicant:



Last Check Ordered: 2/20/2017 Background Check is still processing. Check back later for results. Name: Ann SUSAN Snow Birth Date: 10/10/1990

Viewing Results:

The client user will need to go back into the applicant's profile and click the "Background Check" tab on the top right. The system will check for any available results at that time and display the url for the report only and mark it as complete.

For all other Servant Keeper Version 8 questions, please use the support link at the top of this document or contact the SK Help Desk at 570-748-2800