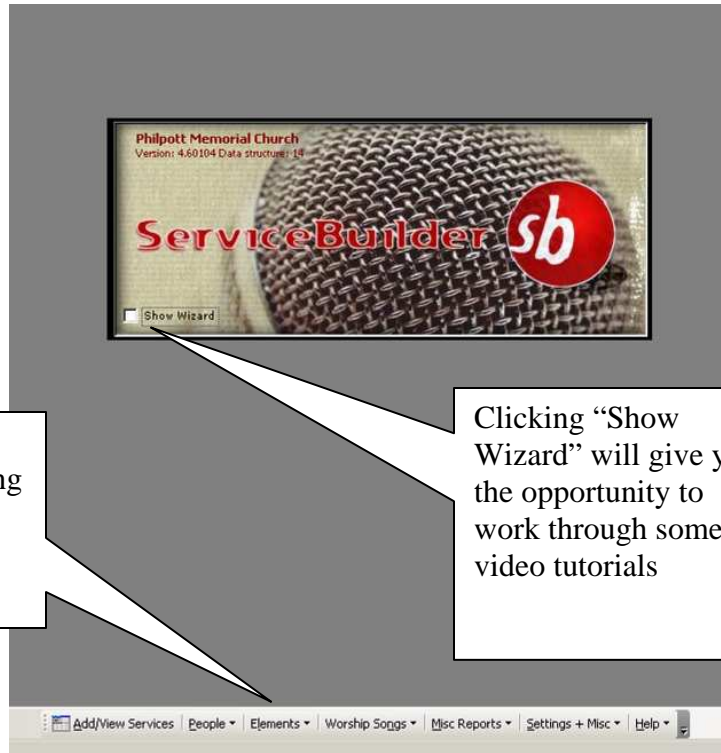


Manual – Updated January 17/2006



1. Getting Started – Understanding the Interface

When you start ServiceBuilder, you'll be presented with the following screen:

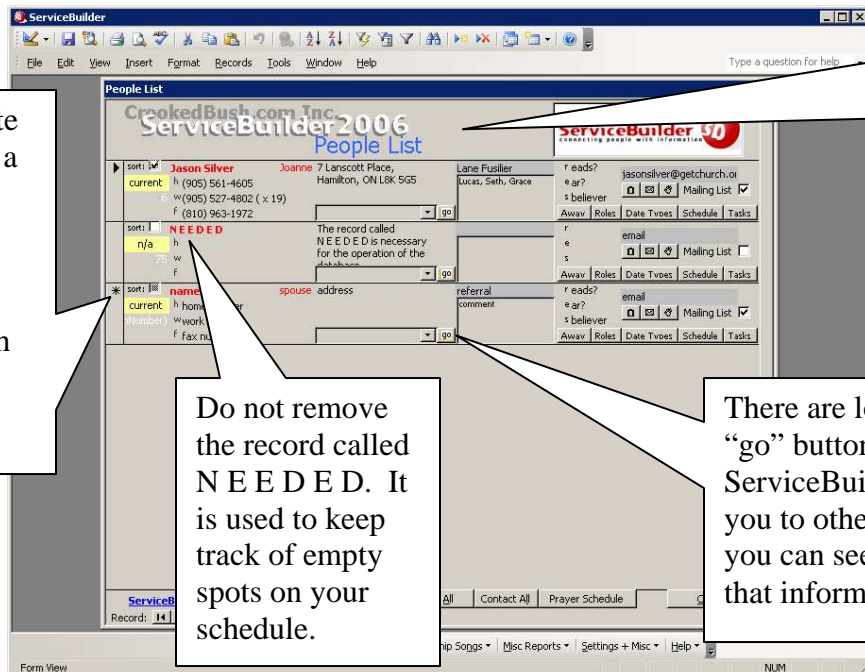


When you start ServiceBuilder, you'll notice a menu appear along the bottom of the screen. This menu gives you access to the many features.

Clicking "Show Wizard" will give you the opportunity to work through some video tutorials

Example Form: People List

To begin, click People, and then click People List. The following screen will appear:



We call each separate entry, (each person) a "record". These rectangular buttons are used for selecting a record. You'll see long, high buttons like this throughout ServiceBuilder.

Do not remove the record called NEEDED. It is used to keep track of empty spots on your schedule.

This People List, is called a "Form." Often buttons will take you to a different form.

There are lots of little "go" buttons all through ServiceBuilder. They take you to other "forms" so you can see, or even edit that information.

2. Entering People in the People List

The first thing you should do is add people to your people list. I suggest adding the people with whom you have the most interaction; maybe your music team, or your regular volunteers.

The screenshot shows a software interface for entering people into a list. The interface includes a search bar, a list of people, and a form for entering details. The form has several fields and options, each explained by a callout box:

- Checked names rise to the top of the list.** (Callout pointing to the 'current' status in the list)
- H: Home
W: Work
F: Fax (or other)** (Callout pointing to the contact information fields)
- A spot to track who invited or referred this person.** (Callout pointing to the 'Invited by' field)
- Enter birthday, anniversary, or other types of dates.** (Callout pointing to the 'Date' field)
- Current can be changed to anything: n/a, child, visitor—it's a way of tagging people.** (Callout pointing to the 'current' status in the list)
- Use this for spouse's name, or type "single," or "child"** (Callout pointing to the 'Spouse' field)
- Type kid's names here, or choose a family from the list.** (Callout pointing to the 'Children' field)
- Be sure to add "Male" or "Female" to the Roles, as well as "member," "visitor," "drummer," or whatever is appropriate.** (Callout pointing to the 'Roles' field)

After you've filled in some of the people in your congregation, you may feel ready to add services. Click "Add/View Services" from the menu at the bottom. When you do, this new 'form' will pop up.

Choose an Event...

Click [go] next to a date to view details of that service, or click [go] at the bottom to add a new service.

Sun, 2006-01-15 9:30	go
Sun, 2006-01-22 9:30	go
Sun, 2006-01-29 9:30	go
Sun, 2006-02-05 9:30	go
Sun, 2006-02-12 9:30	go
Sun, 2006-02-19 9:30	go
Sun, 2006-02-26 9:30	go
Sun, 2006-03-05 9:30	go
Sun, 2006-03-12 9:30	go
Sun, 2006-03-19 9:30	go

All Services in Main Form: go
Add New Service(s): go

Add Services Automatically

Often you may wish to add a sequence of services six months in advance. Rather than add them manually, use this form to add 'x' number of services with one click.

Service Name: Traditional Service

Time of Service: 11:00 AM (eg: 09:30 AM)

First Date: 1/15/2006 (eg: 01/01/05)

Interval: 07 days (eg: 7).

Add this many: 010 occurrences (eg: 21)

Add Services Close

Click "go" next to "Add New Services"

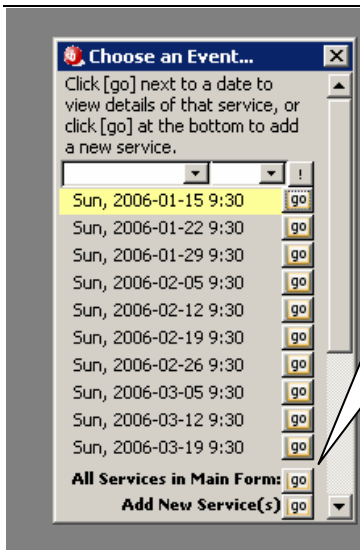
Select the service name from the list.

Enter the occurrence interval.

The times must be inputted in the same format as the examples.

Click to add the services automatically.

Close when you are done.



Click this button “All Services in Main Form,” after you’ve entered the new service date(s). It will open in a new window...

...like this. You can enter details from here, like the series name, the message name, who’s involved, what the order of worship is, etc.

Notice another “go” button. Once a person is chosen from the drop-down box, this “go” button takes you to their “record” in order to view more detail, or to edit it.

Click “Filter Services” to view Contemporary Services only in the form. Click unfilter to view all services in one form.

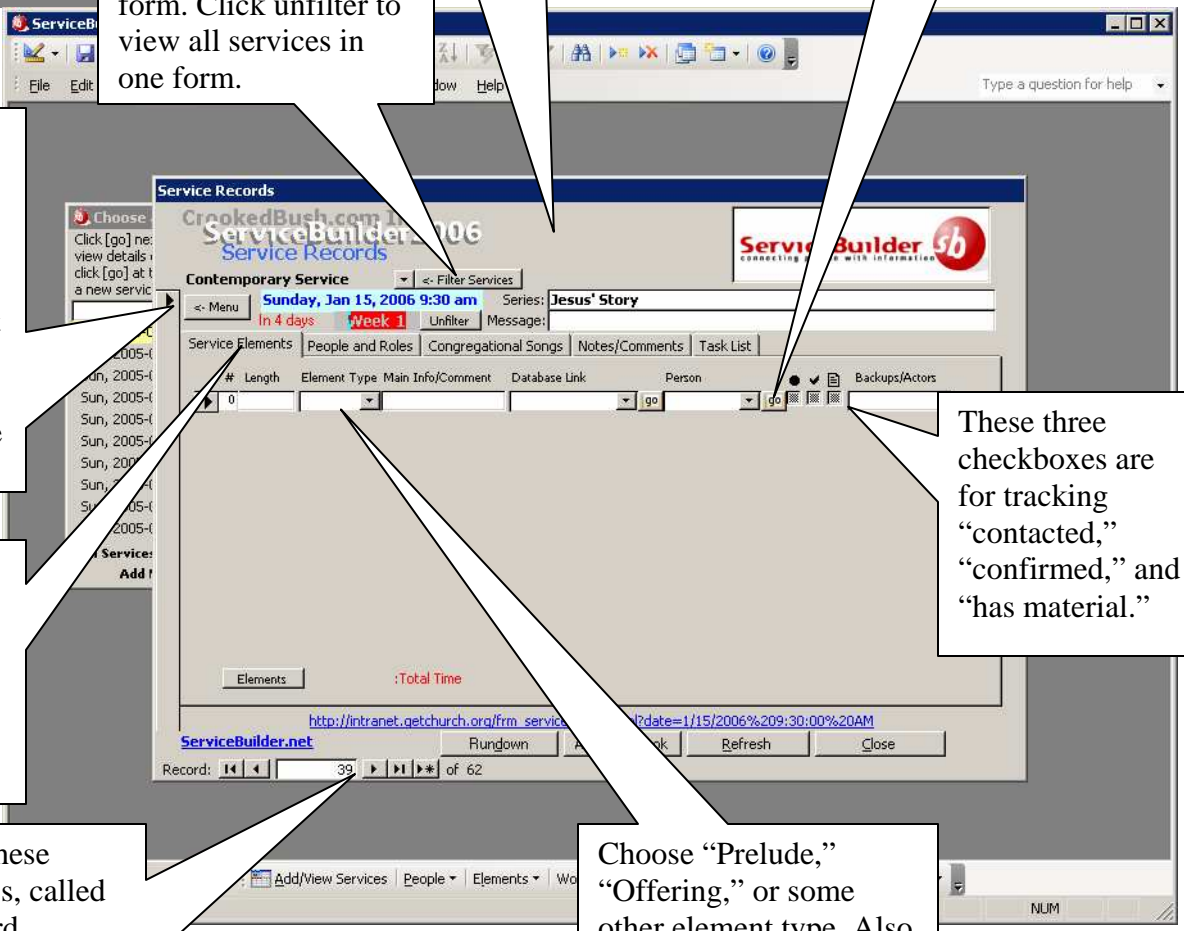
Notice the big button on the left... again, a “record selector” for selecting this service. One might wish to select a service in order to copy, cut, or delete it.

Five tabs: Service Elements, People and Roles, Congregational Songs, Notes, and Tasks.

Use these arrows, called ‘record selectors’ to navigate to the service you wish to edit.

Choose “Prelude,” “Offering,” or some other element type. Also set a length for this in the format h:mm:ss... ie: 0:03:25 would be three minutes, 25 seconds.

These three checkboxes are for tracking “contacted,” “confirmed,” and “has material.”

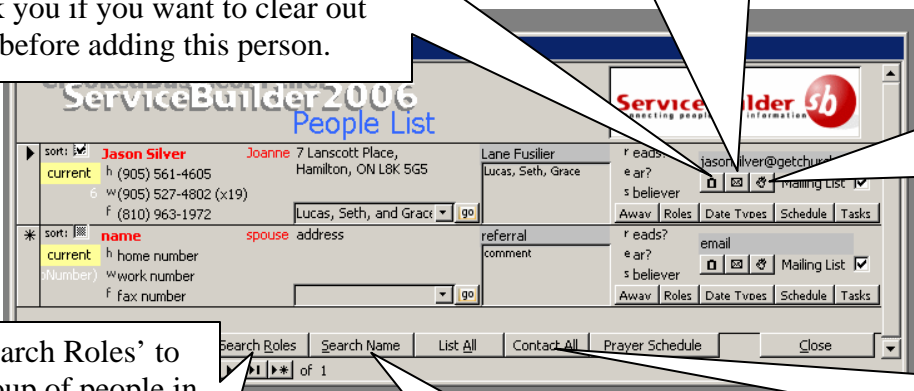


3. Contacting Through the People List

You'll want to use the distribution list to send email to large groups of people. This button-- a picture of a clipboard—will add this person to the distribution list. When you click it, it will ask you if you want to clear out the list before adding this person.

This is a quick way to send individual emails: click this button to open up an email addressed to this person.

This hand is supposed to represent 'praying hands.' Click it to open a prayer request list for this person.



Click 'Search Roles' to find a group of people in your database. Search criteria could be "female," "drummer," "attende," "member," etc. Be sure that each person has these roles associated with them

Click to locate a specific person. You may use a portion of a name in your search.

Clicking 'Contact All' adds everyone in the database to your distribution list.

After clicking "Search Roles," this form appears. Type a portion of your search phrase, and press [Enter]

Highlight and copy this URL to view this form on the Internet. You could send this link to someone via email.



You can mark and unmark people in your People List to indicate their general 'availability.' Right now only marked bassists are showing.

Click "go" to view the details of this person.

Want to email every bass player? Click "Add To List" to add this group to your distribution list. You could send a personalized note asking them to play Sunday.

4. Distribution List

Click 'Change' to send this email on someone else's behalf. Recipients will think someone else sent this email. The pastor? The tech leader? Your spouse?

Change the priority of this email.

Click to view duplicates. You may edit fields in this view as well—change a name, etc.

Example: After building a list of vocalists, you might want to take out all soloists.

Remove children, teenagers, etc.

Choose a report from the drop-down menu, then click 'Preview Report' to view it.

When the email is drafted, click this button to send a personalized copy to each person.

Add this distribution list to your Outlook contacts automatically.

All the emails you write can be saved for future use. This simplifies the whole process so you don't need to keep writing emails over and over again each week. Use these buttons to work through all the emails you've saved. Click the long selector button on the left to highlight the current email, then press 'delete' on the keyboard to delete it.

Standard Emails
Distribution List

Sort Order: 8 From: jasonsilver@qetchurch.org Change Priority: [Normal] [High] [Low]

Subject: Can you be our {role} Sunday, {name}?

Message: Hey {name},
 What do you say-- can be the {role} this week?
 Let me know ASAP.
 Yours,
 Jason

Distribution List: (fullname) or (name) (role) (date)

Eric Fuslier	Bassist	01/
John Benoit	Bassist	01/
John Harvey	Bassist	01/
Kevin Darryl	Bassist	01/
Kyle Arsenauck	Bassist	01/
Scott Orr	Bassist	01/
Simon Hirota	Bassist	01/
Stan Coulter	Bassist	01/

Buttons: Remove Duplicates, Remove by Roles, Remove by Age Range, Preview Report, Add to Contacts, Send Email, Refresh, Close

Record: 8 of 10

5. Relocating/Locating the Back-End Data Files

ServiceBuilder can be easily updated because the back-end data is separate from the workings of the program. When you first update the program, you may need to tell it where the data is:

Choosing 'Change Back-End' will open up a dialogue to allow you to browse to a new data source.

Relink Back-end Data
 If ServiceBuilder is set up for shared use, then it is linked to an external data file located on a network drive. If the link between your program and this data file needs to be re-established, please browse to the data file location now or type the path and file name [sb_data.mdb] in the text box.
 The user file is usually located in C:\program files\ServiceBuilder. The sb_data file is either on your network in a shared place, or installed to the root of C:\

Click 'Browse' to find this new data source. There are two databases to connect to: sb_data.mdb and user.mdb. The former is installed by default to C:\ The latter is installed by default to C:\Program Files\ServiceBuilder

Here's sb_data.mdb on my network drive. Find your copy, likely located at C:\sb_data.mdb, and click 'Open.'

Relink Back-end Data
 If ServiceBuilder is set up for shared use, then it is linked to an external data file located on a network drive. If the link between your program and this data file needs to be re-established, please browse to the data file location now or type the path and file name [sb_data.mdb] in the text box.
 The user file is usually located in C:\program files\ServiceBuilder. The sb_data file is either on your network in a shared place, or installed to the root of C:\

Click "Re-establish Link"

Tables not found
 The following tables were not found in
 P:\Shared Utilities\ServiceBuilder\sb_data.mdb:
 tbl_standard_emails
 tbl_tasks_service_records_default
 Select another database that contains the additional tables?
 Yes No

Click 'Yes,' and find user.mdb

Relink Back-end Data
 If ServiceBuilder is set up for shared use, then it is linked to an external data file located on a network drive. If the link between your program and this data file needs to be re-established, please browse to the data file location now or type the path and file name [sb_data.mdb] in the text box.
 The user file is usually located in C:\program files\ServiceBuilder. The sb_data file is either on your network in a shared place, or installed to the root of C:\

Click 'Open' when you find user.mdb. You'll receive a message, 'Linking to new back-end data file was successful.'

Microsoft Office Access
 Linking to new back-end data file was successful.
 OK

