

New ServWare Conference Checklist

The activities listed below should be completed when a St. Vincent de Paul conference begins using ServWare.

- Review/Set Conference Configuration Options (Conference Administrator)**
 - Admin Menu->Conference Details->Configuration Options tab

- Conference Selection List Setup (Conference Administrator)**
 - Admin Menu->Selection List Options
 - Assistance Types
 - Neighbor Expense Types
 - Neighbor Income Types
 - In-Kind Categories
 - In-Service Categories (if Mileage/Hours In-Service Tracking enabled)
 - Landlords/Housing
 - Member Roles (if Member Role Assignments enabled)
 - Referral Agencies
 - Special Programs (if Special Programs enabled)
 - Utilities

- Conference Member Setup (Conference Administrator)**
 - Setup ServWare users that have Administrator privileges
 - Setup ServWare users that are not Administrators

- Define operational procedures for how the conference uses ServWare**
 - Define what data is collected for neighbors/clients
 - Define guidelines for entering data (i.e. phone numbers, street addresses, etc.)
 - Specify which Assistance Request status values will be used