ServWare Conference Configuration

These configuration options have been defined for Conferences in Indianapolis Council for the set-up and use of ServWare.

This will support consistent use and enhanced reporting with the ability to aggregate data.

Access configuration: Home page > Admin > Conference Details > Configuration options.

The following options should be selected by "checking" the box. All other boxes should not be "checked".

Neighbor Configuration Options:
All History
Current Year
Previous Year
Apply Phone Number Format
Require Neighbor Phone Number
Record Call Intake Person
Suppress Neighbor SSN/DL Nbr Fields. Add ID Verification.

Assistance Request Configuration Options:
Direct Payment Voucher Tracking
Separate In-Kind Assistance Totals
Conference Member Assignment on Request (Not Visit Assignment)
Conference Member Assignment on Assistance
Validate Visit Completion on Completed Projects
Suppress Non-National VISA types
Include Neighbor Name in Request Email
Special Program Support

Advance Request Email Option
>Neighbor Email cc Addresses:
>>Enter neighborservices@svdpindy.org in the box. This is the email address that should receive all Assistance Requests. You will see this email as a selection when using the email option when sending your Assistance Request.

Finance Configuration Options

Financial Functions
Include Assistance with Expenditures
Restrict Financial Updates to Admin Users
Assoc Expenditures with Acct
Assoc Receipts with Acct
Assoc Deposits with Acct
Assoc Assistance with Acct
Allow Neg Value Entry
Account Reconciliation/Period Close

Pantry/Food Distribution Configuration Options

Food Pantry/Distribution (in Progress)

Reporting Configuration Options

Fiscal Year (Oct through Sept)

Member Related Configuration Options

Mileage/Hours In-Service Tracking
Assign Conference Member Roles
File Uploads for All Users

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Setting up Neighbor Assistance Items

This will create a list of assistance items that you pick from when creating the Assistance Request. These are in the same order as on Referral Form.

Access:

ServeWare Home > Admin > Selection List Options > Assistance Types

SEE SPREADSHEET FOR ASSISTANCE ITEM SET UP DETAIL.