ACS People Suite – Organizations

Organizations

The Organizations module in ACS People Suite records and reports information about the offices that constitute your organization.

The Organizations module assists you in tracking information on your entire organization and can be adapted to fit your organization's needs. You can keep track of organizations on all levels as well as staff information. The Organizations module also contains unlimited Statistics fields to track fields specific to your organization or denominational office.

Using this Guide

New to ACS Organizations? We suggest checking out the Organizations Startup Outline and Gather ing Organization Information topics to learn how to effectively set up the Organizations module. In addition, the topic about Organizations Security Rights can help you set up security levels for your staff members who will work with the Organizations module.

If you've been using ACS Organizations, you may want to read the latest ACS Release Notes to learn about any new features or corrections.

Organizations Setup and Maintenance

In the Organization Setup area, you can choose settings for using the Organizations module, set up PIN numbers, and activate the Organizations Changes Log.

You can also define lists and items such as staff positions, staff levels, and organization levels.

Defining Lists in Organizations

Using Define Lists, you can set up your available fields, list items, dates, and positions.

One of the first but most important steps of setting up ACS Organizations is setting up organization levels. These levels structure organizations in the module, and once an organization is attached to a level, that level cannot be changed. This step is crucial, so we recommend gathering organization information and even planning your organization level hierarchy on paper before entering this information in ACS.

After setting up organization levels, you can set up dates, fields, and lists in Define Lists, and you can also set up staff information, such as staff positions, position levels, and statuses.

- Setting up Organization Levels
- Defining Open Dates, Fields, and Lists in Organizations
- Setting up Staff Statuses
- Setting up Staff Positions
- Setting up Staff Position Levels

Setting up Organization Levels

Use Define Lists to set up the different levels of your organization. These levels structure your organizations, so when adding organizations, start from the top and work down. We strongly recommend planning your organizations levels on paper prior to setting them up in ACS, along with gathering information about the organizations and what you want to track.

Once an organization is attached to a level, you **cannot** change the level. This protects the organizational structure. You can only edit the level's description or delete organization levels that are no longer in use and do not have organizations associated with them.

Examples of Organization Levels

Here are some examples of Organization levels. While these specific examples may not work for your specific organization, they can serve as a guide of how to set up levels from the top down.

Example 1: Lutheran General Body
The different levels of a Lutheran General Body could be set up as:

- General Body
- Synod
- Congregation

Example 2: The Presbyterian Church
The different levels of a PCUSA Synod could be set up as:

- Synod
- Presbytery
- Churches/Congregations

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Organizations**.
4. Select **Levels**, and click **Add**.
5. In the **Field Description** field, enter the name of the new level (up to 20 characters).
6. **Optional:** To add more levels, select **Add Another**.
7. Click **OK**.

Defining Open Dates, Fields, and Lists in Organizations

ACS Organizations contains several open dates, fields, and lists that you can customize and define. This lets you track additional information about organizations. There are four IDs, five fields, and five dates you can use to track important additional information.

For example, your organization wants to track the Homecoming date and the date of inception. Select a previously undefined date field and customize for Homecoming. Do the same thing for Date of Inception. These dates are customized in Define Lists.

When you define the date fields in one organization, the fields are automatically defined in all other organizations. You only have to define these fields once.

Accessing Define Lists on the Fly

You can access the Define Lists window from the **Additional Fields** tab. Under **Dates**, **Lists**, **IDs** or **Fields**, select the **Not Defined ID**, **Date**, **List**, or **Field** you want to use, and click. It becomes a hyperlink and takes you directly to the Define Lists window.

This lets you know exactly where the information you are setting up displays on the **Additional Fields** tab. You must also have the proper security rights to use this option.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Organization**, expand **Dates**, **Fields**, **or Lists.**
4. Select a **Not Defined Date, Field, or List** to assign a name to and click **Activate Field**.
5. In the **Field Description** field, enter a description.

   Defining Dates

   In many areas of ACS, information is listed in alphabetical order. When defining date fields, you may want to start each with "Date of". For example Date of Homecoming, Date of Inception.

   By putting "Date of" in front of all dates, they are all listed together rather than the homecoming date being in the "h's" and inception date being in the "i's".

6. Click **OK**.

Setting up Staff Statuses

After setting up staff positions and levels, you can set up staff statuses, such as full time and part time.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go**.
3. Under **Fields**, expand **Staff**.
4. Select **Status**, then click **Add**.
5. In the **Field Description** field, enter the status you want to add.
6. Click **OK**.

Setting up Staff Positions

Before entering specific organizational data concerning staff or statistics, you need to define staff positions and position levels. Use these positions and position level designations when entering staff members for an organization.

You must enter staff positions before you can add position levels.

1. Under Advanced Tools, click the **Define Lists** tab.

2. In the drop-down list, select **Staff/Organizations** and click **Go**.
3. Under **Fields**, expand **Staff**.
4. Select **Positions**, then click **Add**.
5. In the **Field Description** field, enter a name for the position.
6. **Optional:** If you have position codes for different staff positions, in the **Position Code** field, enter the code.
7. Click **OK**.

Setting up Staff Position Levels

Position Levels help give more definition to the Positions you create. For instance, you have a Position of "Minister" and then associate "ordained", volunteer", and "interim" Position Levels with the Position.

When you add an individual and assign "Minister" as position, you can also choose the correct level (ordained, volunteer, or interim). You can associate Position Levels with Positions using the Assign Position Levels option or by copying a position level. Copying staff position levels from one position to another reduces the time spent entering staff information.

Before you can associate Position Levels with Staff Positions, you must enter them in Define Lists.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go**.
3. Under **Fields**, expand **Staff** and select **Position Levels**.
4. Click **Add**.
5. In the **Field Description** field, enter a description.
6. **Optional:** To add more levels, select **Add Another**.
7. Click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go**.
3. Under **Fields**, expand **Staff**, and then expand **Positions**.
4. Select **Position Levels**.
5. In the **Position Levels** pane, select the position level that you want to copy to another position.
6. Drag-and-drop the position level on top of the position that you want in the **Fields** pane.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go**.
3. Under **Fields**, expand **Staff**.
4. Select **Position Levels**.
5. In the **Position Levels** pane, select a position level and click **Edit**.
6. In the **Field Description** field, edit the description and click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go**.
3. Under **Fields**, expand **Staff**.
4. Select **Position Levels**.

5. In the **Position Levels** pane, select a position level and click **Delete**. You cannot delete a position level that is in use.
6. When the confirmation message displays, click **Yes**.

Working with Organizations Settings

You can set up default newsletter, statement, and email options, as well as organization level and PIN options.

You can also set up duplicate name checking to prevent creating duplicate organization records.

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Staff/Organizations**, and click **Go** .
3. In the Organization Setup window, on the **Settings** tab, select your options.
4. Click **OK**.

Setting up Organization PINs

In Organizations Setup, you can set up organization PINs.

A PIN is the number assigned to an organization for record keeping capabilities. Each organization has its own PIN and is tracked by this number. You can perform searches using the PIN or use it with envelope numbers when posting contributions.

Before setting up PINs, decide if you want to use your PIN as your envelope number. Your PIN and Envelope Number can be the same number, or you can choose separate numbers for each.

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. On the **Settings** tab, under **Organization Settings**, select the **Use PIN as Envelope Number** checkbox.
4. Click **OK**.

Working with the Organizations Changes Log

The Organization Changes Log is an Organization report that lists the details of changes made to organization records. You can filter, print, or sort this grid report, which is helpful if you have questions about who made what changes to a specific record.

The report displays the name of the organization whose record was changed, the date and time the change was made, the user name of the individual who made the change, and the type of change that was made. Only changes to the organization name, address, email address, or phone number are tracked.

For merged records, the report lists the duplicate record as **Organization Merged**, and the preferred record as **Organization Updated.**

You can clear the entire Organizations Changes Log or clear changes for a specific date range.

1. Under Advanced Tools, click the **Settings** tab.

2. In the drop-down list, select **Staff/Organizations** and click **Go**.
3. On the **Organization Changes Log** tab, select **Activate Organization Changes Log**.
4. Click **OK**.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go**.
3. In the upper sidebar, expand **Lists**.
4. Select **Organization Changes Log** and click **Customize**.
5. On the **Report Options** tab, select the options you want to include in the report.
    - **Name Options** — Select to print the organization name or the reference name.
    - **Include Deactivated Organizations** — Select to print organizations that are deactivated.
    - **Print PIN** — Select to print the PIN for all selected organizations.
    - **Custom Sort (Alpha)** — Select to sort in alphabetical order.
    - **Use Date Range** — Select to display entries within a date range. In the drop-down lists, select the from and to dates.
    - **Use Last Search Results** — Select to print based upon you last search results.
6. To view the report, click **Preview**.
7. Click **Print Report**.

Adding and Editing Records in ACS Organizations

The Find Organization window is the main area for tracking details about the churches and organizations you work with. In this window, you can add new organizations, view and edit organization records, print organization profiles, and generate a mail merge letter to organizations. You can also filter the window to display similar organizations.

Adding an Organization

You can add an organization by selecting **Add an Organization** on the Workbench menu or clicking **Add New Organization** in the Find Organization window.

When adding organizations, add the highest level organization first. Add all organizations in descending order from the highest level to the lowest level. Each organization (except for those on the highest level of the organization hierarchy) must have a parent organization unless you selected **Allow Unaffiliated Organizations** in Organization Setup. Enter at least one organization on each level of the hierarchy to get started.

After adding an organization, you can enter the organization's other information on the various tabs in View /Edit Organization.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Add an Organization** and click **Go**.
3. Enter the necessary information for the organization. To learn more about the fields, see the **Additional Field Descriptions** below.
4. When finished, click **OK**.

Additional Field Descriptions

Name Information

- **Organization Level** — Select a level for the organization in the drop-down list.
- **Parent** — Select the parent for the organization.
- **Reference Name** — Enter the name by which the organization is commonly referred. For example, First Baptist Church of Alabama might be called FBCA.

Organization Primary Address

- **Company** — If the organization has its offices in another company's building, select and enter the name of the company.
- **Geo Zone** — Enter a geographic zone or select one from the drop-down list.
- **Sub Zone** — Enter a sub zone or select one from the drop-down list. A sub zone represents an area within a geographic zone such as a community or a subdivision.
- **Map Page** — This is a map code used in conjunction with a third-party mapping software. If your mapping software has this capability, use the map code in ACS to plot the location of the organization on a map.
- **Map X and Map Y** — Enter the organization's coordinates.

Organization Information

- **PIN** — Enter a **PIN**, or to select the next available number, click **Next #**.
- **Env #** — Enter an envelope number, or to select the next available number, click **Next #**. If you do not want to use the PIN as the envelope number, **Next #** assigns the next available envelope in the database.
- **Tier** — Select the tier with which to group the organization. You can use a tier as a way to group organizations geographically, such as by Zone, Region, or Deanery. This list is defined in Define Lists.
- **Send Newsletter** — Select the method for which a newsletter is to be delivered to the organization.
- **Contributor Status** — Select if this organization is active, inactive, or not a contributor to your organization.
- **Send Statement** — Select to send contribution statements to this organization.

Additional Information

- **Web Address** — Enter the organization's Web address.
- **E-mail Address** — Enter the organization's e-mail address. The e-mail type for the e-mail address you enter is the default e-mail type defined in the Organization Setup window.
- **Notes** — Enter a description of the organization or additional information
- **Key Note** — To have the note display for the organization before the View/Edit Organization window opens, select **Key Note**. For example, you can use the Key Note as a means to notify the user of an important note concerning the organization.
- **Add Another** — To enter another organization, select **Add Another**.

Changing an Organization's Affiliation

If an organization is no longer affiliated with other organizations, you can change their affiliation status. For example, if a church separates from its mother church, you can break the affiliation record.

You can also change an organization's parent information or change a parent organization to unaffiliated.

Note

An unaffiliated organization cannot be the parent or the child of another organization.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Profile** tab, in the **Parent** field, click **Lookup** and select a parent for the organization.
5. Click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want unaffiliated and click **View/Edit**.
4. In the **Parent** field, click **Lookup** .
5. Click **Set to Unaffiliated**.
6. Click **OK**.

Changing an Organization's Level

You can change the level for an organization. Once an organization has a sub-organization (a lower-level organization assigned to it), you cannot change the level of the parent organization. This applies only if the **Enforce Organization Hierarchy** option is selected in Organization Setup.

For more information about Enforce Organization Hierarchy, see Working with Organizations Settings.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Profile** tab, in the **Organization Level** drop-down list, select a level.
5. Click **OK**.

The Find Organization Window

A number of tools and options are available in the Find Organization window. The center grid area displays the organizations in your database. You can point to an organization, use the scroll bar, use the page up, page down, home, and end keys to navigate the list.

You can also enter an organization name, reference name, PIN, or city, in the **Enter** field at the top depending upon what you have selected in the **Search By** section at the bottom of the window.

To open an organization's record, select the organization name and click View/Edit, double-click on the name, or press enter when the name is selected. Click **Add New Organization** to enter a new record to your ACS database.

To print an organization profile summary of key data in the organization's record, click **Print Profile**. To open the ACS Mail Merge feature, click **Letter**.

The **Show Results for** options provide a way to select a subset of names to display in the center grid, based on a filter or a search. To access filtering in the Find Person window, click **Filter**. To set up searches, click **Searches** on the Organizations menu.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. In the Find Organization window, using a variety of methods , you can select the organization you want to work with.
    - Enter the organization's name into the selection box at the top.
    - Point with your mouse arrow to a name in the grid area.
    - With your cursor in the grid area, on your key board use the Page Up or Page Down, the up/down arrows, and the Home/End keys or use the scroll bar to find the name you're looking for.
4. With the organization selected, click **View/Edit.**

Customizing the Find Organization Window

You can use the Customize window to select the fields to display next to an organization's name in the Find Organization grid. You can also use the Customize window to choose how to search for and locate organizations in the Find Organization window.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. In the Find Organization window, right-click inside the grid, then select **Customize**.
4. In the Customize window, select the appropriate options on the **Grid** and **Options** tabs. The selections you make are stored by user name and don't affect the settings of other ACS users in your organization.
5. When finished, click **OK**.

Viewing and Editing an Organization's Record

After adding an organization, you can enter the organization's information on the tabs in the View/Edit Organization window. This window lets you track the organization's contact information, such as addresses, phone numbers, and e-mail addresses, affiliates, staff members, statistics, sponsors, groups, connections, and comments. You can also upload documents or pictures on the organization's record.

The Profile Tab in Organizations

The **Profile** tab displays important information about an organization, such as the organization's PIN, envelope number, tier, language, newsletter status, year established, contributor status, web address, notes, and statement status. The tab also displays the organization's primary address and phone number and primary contact.

In addition, you can view the organization's entry date, the date the organization last contributed, and the date the organization's record was updated on the **Profile** tab.

You can change most information on the **Profile** tab, but there are a few exceptions.

- You must change an organization's primary contact on the **Staff** tab.
- You must change an organization's primary address on the **Addresses** tab.
- You cannot change an organization's level if **Enforce Organization Hierarchy** is selected in Organizations Setup. Once an organization has a sub-organization (a lower-level organization assigned to it), you cannot change the level of the parent organization.

When you (or someone in your organization) make changes to an organization's record, you can click **View**

Change Log to view a grid that displays the change, the user name of the staff member or volunteer who made the change, and the date and time the information was changed. You can also filter and sort this grid.

If you use Abundant for online giving and an organization has donated, click to launch the organization's Abundant profile.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Profile** tab, click in a field and make the necessary changes.
5. Click **OK**.

The Additional Fields Tab in Organizations

The **Additional Fields** tab contains user-defined fields that you can customize to meet the needs of your organization.

Think of the additional categories and lists as the questions you want to ask, and the options as the answers. You can set up your questions in Define Lists, and on the **Additional Fields** tab, you can enter or select your answers.

You can set up lists, IDs, fields, and dates. Some examples of items to track include the organization's primary language, EIN (Employer ID Number), or date of inception.

If specific information you track about an organization on the **Additional Fields** tab is no longer correct, you can change the information. For instance, you have a **List** set up called # **of Members**. The drop-down has choices such as Under 500, 501-1000, 1001-1050, etc. One organization listed in your ACS database has grown and their description needs to change from 501-1000 to 1001-1050.

Editing Descriptions on the Fly

A quick way to edit the descriptions of any of your open dates, open categories, or open fields is to click the field you want to edit when you are in an organization's record.

The field opens in the Define Lists window. You must have the correct security clearance to work in Define Lists.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit.**
4. Click the **Additional Fields** tab.
5. Add the necessary information in the fields and click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit.**
4. Click the **Additional Fields** tab.
5. Click a list, field, ID, or date name.
6. In the Define Lists window, click **Change Desc.**.
7. In the **Field Description** field, enter a field description, then click OK.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit.**
4. Click the **Additional Fields** tab and make the changes you want.
5. Click **OK**.

Additional Field Information

Lists
This additional list stores information when there is a limited number of possible entries. The entries for categories are defined in and selected from a list. These entries are called list items or elements. An example is: Type Church: Metropolitan, Rural, and Suburban.

Field
This additional list stores information when there are unlimited, possible entries. The entries for fields are not selected from a list, but are typed in. An example is Auditorium Size.

Date
This additional list stores the date of a particular event. Dates can be typed in or selected from the drop down calendar. An example is: Date of Inception 00/00/0000.

The Addresses Tab in Organizations

On the **Addresses** tab in View/Edit Organization, you can add, edit, and delete an organization's addresses. After adding addresses, you can specify address types, which is helpful if an organization meets at a different location or an organization's primary or mailing addresses are different (for example, if the organization receives mail or statements at a P.O. Box).

When you change an organization's address, ACS automatically updates the **Org Type** address for each Staff Member linked to the Organization. To view a grid listing address changes, click **View Change Log** .

You can also map the address of any organization in your organizations module. This function opens a Web page and uses the address information entered into organizations to display a street map of the selected organization, which is useful if you are planning to visit an organization.

If you'd like a printable list of all addresses for the organization, click **Print** to display this list, which also includes the type of address, if applicable.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Addresses** tab, then click **Add**.
5. Enter the information for the organization's address, then click **OK** to save the address.
6. To save additions, click **Close**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Addresses** tab.
5. Under **Active Addresses**, in the **Primary**, **Meeting**, **Mailing**, and **Statement** drop-down lists, select the appropriate addresses.

   > **Tip**
   >
   > If you'd like to rename these address types or add new ones, place your cursor over the name of the address type, then click the hyperlink to go to Define Lists.

6. When finished, click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Addresses** tab, then select the address you want to map.
5. To open a Web page that creates a street map for the selected organization address, click **Map Address**.
6. To return to Organizations, close the Web page.

The Primary Affiliates Tab in Organizations

The **Primary Affiliates** tab houses records of individuals who are often associated with the organization. On this tab, you can add, change or clear primary affiliations associated with the selected organization.

If an individual is the primary affiliate for another organization in your ACS database, use the change option (For example, if the individual moves from the Regional Office to the State Office). If the individual is no longer affiliated with the organization, use the clear option.

An individual can be on an organization's staff, but can only be a primary affiliate for one organization. You can also view or edit primary affiliates on the **Affiliates** tab.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click on the **Primary Affiliates** tab, then click **Add an Affiliate**.
5. Select the individual you want to add, or click **Add New Family** to add a record to your ACS database.
6. When finished, click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. On the **Primary Affiliates** tab, select the individual whose primary affiliation you want to change, and click **Change Affiliation**.
5. In the **New Primary Affiliation** field, click **Lookup** .
6. Select an organization, and click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click on the **Primary Affiliates** tab.
5. Select the individual, and click **Clear Affiliation**.
6. When the confirmation message displays, click **Yes**.

The Affiliates Tab in Organizations

On the **Affiliates** tab, you can view an organization's primary contact, staff members, group information, and primary affiliates. This saves time, since you don't have to click on each tab to view the information. You can also add staff members and primary affiliates on this tab.

Under **Staff** and **Groups**, you can also view an organization's staff members or affiliates' groups as of an effective date by selecting the date in the **Effective Date** drop-down list.

For example, if you need to know which staff members worked at an organization last year, or need to know their positions or position levels as of last year, you can select the appropriate date from last year in the **Effective Date** drop-down list, and the grid automatically updates with the information as of that date. To view all past and present staff members or groups, select **Show All**.

The Staff Tab in Organizations

Staff members are the people who work in an organization and hold positions. Examples include pastors, volunteers, and administrators. After you add an organization's record, enter the organization's staff. You can keep an organization's staff information for an unlimited number of years. The **Staff** tab tracks the organization's staff and user-defined statistics.

A primary contact is the liaison for the organization who you correspond with, and you can select or change this person on the **Staff** tab.

Additional Field Information

Staff Information

- **Start Date** — Select the date the staff member began. By default, the **Effective Date** displays.
- **Name** — Click **Lookup** to select an individual from the Find Person window in the People module.
- **Position** — Select the staff member's position from the drop-down list. You can set up positions in Define Lists.
- **Position Level** — Select a position level, defined for the selected position, from the drop-down list. You can set up position levels in Define Lists.
- **Status** — Select the employment status of the staff member.
- **Notes** — Enter notes or extra information for the staff member.
- **Ordained** — Select if the staff member is ordained, and enter the date he or she became ordained.
- **Licensed** — Select if the staff member is licensed, and enter the date he or she became licensed.
- **Lay Staff** — Select if the staff member is associated with the church, but is not a member of the clergy.
- **Primary Affiliation** — Select to verify the current organization as the staff member's primary affiliation.

Mail To

- **Primary Affiliation** — Select to copy the organization's address to the individual's record and set the address as the staff member's mailing address.
- **Individual Address** — Select to set the staff member's home address as their mailing address.

Staff Mail To
Use Staff Mail To to select which address or addresses display when printing Staff Labels, Staff Mailing Directory, Staff Mailing Records, Staff Names and Special Fields.

Position Organization
Select to display all addresses of organizations for which the individual holds a position. If you select **Position Organization** under **Staff Mail To**, the organization's address and phone number print on the Staff Mailing Directory report, the Staff Mailing Records report, and the Staff Names and Special Fields report and export.

Individual Address
Select to display the individual's address.

Working with an Organization's Primary Contacts

The Primary Contact is your liaison with the organization, and the individual's name displays on both the **Profile** and **Staff** tabs. Before you can add a primary contact, the individual must already be a staff member for that organization.

After adding staff members, you can select an organization's primary contacts on the **Staff** tab. You can also change primary contacts or remove an employee's name as the primary contact. This means that the employee no longer is the primary contact for the organization.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go**.
3. Select the organization whose primary contact you want to set and click **View/Edit**.
4. On the **Staff** tab, select a staff member and click **Set Primary Contact**.
5. When the confirmation message displays, click **Yes**, then **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go**.
3. Select the organization whose primary contact you want to clear and click **View/Edit**.

4. On the **Staff** tab, click **Clear Primary Contact**.
5. When the confirmation message displays, click **Yes**, then **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose primary contact you want to change and click **View/Edit**.
4. Click on the **Staff** tab.
5. Select the name of the staff member you want to change to the primary contact and click **Set Primary Contact**. If the person you want to make the primary contact is a new staff member, follow the procedure for adding a staff member and then select the staff member as the primary contact.
6. When the confirmation message displays, click **Yes**.

The Contact Information Tab in Organizations

The **Contact Information** tab tracks phone numbers, e-mail addresses, and social media information for an organization, including the organization's Access ACS login e-mail address. You can also select the organization's primary address phone and meeting address phone, if the organization meets in a different place, and view the organization's Access ACS logins.

You can add an unlimited number of phone numbers and e-mail addresses to an organization's record.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organization** and click **Go** .
3. Select an organization and click **View/Edit**.
4. In the View/Edit Organization window, click the **Contact Information** tab.
5. Under **Phones**, click **Add**.
6. To select the **Phone Type**, click the drop-down list defined in Define Lists.
7. Enter the phone number, whether it is listed or unlisted, and the extension (if applicable).
8. Click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit.**
4. On the **Contact Information** tab, in the **E-mail Addresses** area, click **Add.**
5. Enter the information for the e-mail address.
    - **E-mail Type** — Select a type of e-mail address from the list.
    - **Listed/Unlisted** — Select whether an e-mail address is listed or unlisted.
    - **E-mail Address** — Enter an e-mail address. The e-mail address can be up to 50 alphanumeric characters.
    - **Preferred E-mail Address** — Select if the organization prefers to be contacted at this e-mail address.
    - **Set as Access ACS Login E-mail** — Select to use this e-mail address as the organization's Access ACS e-mail login.
6. Click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose social media address you want to add or edit and click **View/Edit.**
4. Click the **Contact Information** Tab.
5. Under **Social Media**, click **Add** or **Edit**.
6. In the Add/Edit Social Media window, enter the necessary information.

- **Link Type** — In the drop-down list, select the type of social media address you are adding or editing. To edit this field's values in Define Lists, place your cursor on **Link Type** and click the hyperlink.
- **Listed** — Select if the social media address you are adding or editing is listed.
- **Unlisted** — Select if the social media address you are adding or editing is unlisted. By default, unlisted addresses do not print on reports.
- **Address** — Enter the organization's social media address. Be sure to enter this in the form of a Web address, not the organization's user name on the social media site. The URL is limited to 100 characters. For example, when adding ACS Product Development's twitter account, enter http://twitter.com /acsproductdev, rather than acsproductdev.

7. When finished, click **OK.**

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose phone number or e-mail address you want to change and click **View /Edit**.
4. On the **Contact Information** tab, select a phone number or e-mail address and click **Edit.**
5. Change the necessary information and click **OK.**

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose phone number or e-mail address you want to delete and click **View /Edit**.
4. On the **Contact Information** tab, select a phone number or e-mail address and click **Delete**.
5. When the confirmation message displays, click **Yes**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit.**
4. Click on the **Contact Information** tab.
5. Under **E-mail Addresses**, click **View Access ACS Logins**. E-mail addresses the organization uses to log into Access ACS display.
6. To add an Access ACS login e-mail address to the organization's ACS record, click **Add to record.** The Add/Edit E-mail Addresses window displays.
7. In the Add/Edit E-mail Addresses window, select the appropriate options and click **OK**.

The Statistics Tab in Organizations

Use the **Statistics** tab to track statistical information for each church or group in the Organizations module.

Before you enter statistics, you need to configure what you track on each page. There are unlimited user defined Statistics fields on these pages. The Statistics fields are flexibly designed to enable you to track various types of statistical information for your organization. For example, you can use the Statistics fields to track membership, attendance, baptism, special service membership, and contributions.

Some Statistics fields are predefined for your convenience. You can edit the predefined fields and you can also configure your statistics field information to suit your needs. The headings display and calculate statistics in many different ways.

You can view statistical information on both the **Statistics** and **Statistics Views** tabs but there are differences in how you use these tabs.

Setting up Pages and Fields in Organizations Statistics

Before you can track statistical information and enter statistics, you'll need to set up the Statistics pages and fields in ACS Organizations.

Viewing the predefined fields may help give you ideas on how you want to set up Statistics. An excellent source of possible statistics is information from your Annual Report. You may want to create a rough outline of want you want to track in Statistics before you do the set up work.

Some statistics fields are predefined, but you can customize others. To track similar information, set up a statistics field Page.

If the information you want to track changes, you can edit statistics fields or define new fields to track additional information. Other tips include putting similar information on the same page, creating headers to make it easy to find information, and using Total Fields to have ACS calculate the sum or multiple fields.

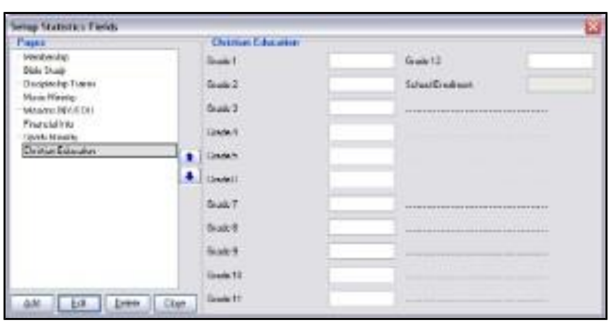
If you need to delete a field, you can right-click on it to delete it.

For example

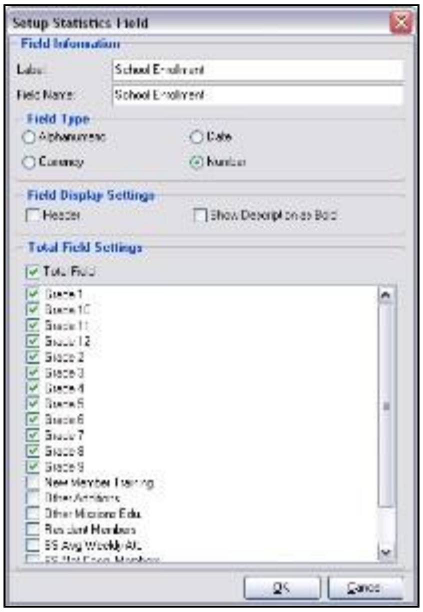
You could set up a page titled **Christian Education** to track Sunday School Enrollment.

If using grades, set up a **Number** field for each grade, 1-12 (A total of 12 fields). Then, set up a **Total Field** called School Enrollment and select to include each Grade field you set up.

After you enter enrollment for all of the grades and click **Calculate Totals**, the field displays your total school enrollment.



Setting up a Page for Christian Education



Setting up a Total Field for School Enrollment

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Statistics** tab, click **Setup**.
5. Under **Pages**, select a page.
6. In the right pane, click on a field name or a dotted line.
7. Under **Field Information**, enter a **Label name**. This displays on the **Statistics** and **Statistics Views** tabs.
8. Enter a **Field Name**. This displays on reports and graphs.
9. Under **Field Type**, select the type of field you want this to be. To learn about the types, see the Additional Field Information below.
10. Under **Field Display Settings**, select the appropriate settings for this field.
11. If this is a total field, under **Total Field Settings**, click **Total Field** and select the appropriate fields.
12. Click **Close**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Statistics** tab, click **Setup**.
5. Under **Pages**, click **Add**.
6. Enter a **Page Description**, then click **OK**.
7. In the right pane, click on a dotted line to define a field.
8. Under **Field Information**, **Field Type**, **Field Display Settings**, and **Total Field Settings**, enter the appropriate information or select the appropriate option. To learn more, see the Additional Field Descriptions below.
9. When finished, click **OK**.

10. Repeat steps 7-9 to define other statistics fields. When finished, click **Close** to return to the **Statistics** tab.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Statistics** tab, click **Setup**.
5. Click on the **Statistics** field you want to edit.
6. Make the appropriate changes, and click **OK**.

Entering Organizations Statistics

After you've set up your Statistics pages and fields, you can enter statistics for the organizations in ACS.

First, select the **Year** in the drop-down list, or click **Add Year** to add pages for a new year. Then, select the **Page** in the drop-down list. You can also use the **Next Page** button to scroll through the pages of statistics for that organization.

When you enter numbers that are summed in a Total Field, the total updates as you enter text. As you enter information on fields and pages, ACS automatically saves your entries.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the appropriate organization and click **View/Edit**.
4. Click on the **Statistics** tab.
5. In the **Year** drop-down list, select the year for which you want to add information. If the year is not in the drop-down list, click **Add Year** to add it.
6. Enter the information in the available fields. To scroll from page to page, select a page in the **Page** drop-down list, or click **Previous Page** and **Next Page** at the bottom of the window.
7. When finished, click **OK**.
8.

Statistics vs. Statistics Views in Organizations

Statistics and Statistics Views share information. In other words, if you change a statistics value on the **Statistics Views** tab, that change is reflected on the **Statistics** tab, and vice versa.

Although Statistics and Statistics Views pull information from the same place, they can be used differently. In Statistics, you view information on customized pages. In Statistics Views, you view information based on the view someone set up. Examples of views are financial information, enrollment totals by choir (preschool, children's, youth, adult, handbell).

The Statistics Views Tab in Organizations

You can track a large amount of statistics for each organization, but sometimes you want to view only specific areas. Use **Statistics Views** to customize the statistics to view selected fields.

In **Statistics**, information is grouped by page. Use **Statistics Views** to group and combine specific fields from multiple pages. For example, if you have a Membership page, a Bible Study page, a Discipleship Training page, and a Music Ministry page, and each page includes fields that are age specific (e.g. Age

Birth - 5, Age 6 - 11, etc.), with **Statistics Views**, you could set up a view to show all of the statistics for Membership, Bible Study, Discipleship Training, and Music Ministry for people between the ages of Birth and 17.

On the **Statistics Views** tab in the View/Edit Organization window, you can:

- Set up Statistics Views
- Add and edit Statistics information
- Filter Statistics Views to view information for multiple pages, years, or a selected year
Print Statistics information
- Graph Statistics information
- Export Statistics information to an Excel (.xls) file or an .html file

Adding and Editing Fields in Statistics Views

After setting up Statistics Views, you can add new statistics information or edit existing information. You can also do this on the **Statistics** tab, and any changes you make are reflected there as well.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to add statistics for and click **View/Edit**.
4. On the **Statistics Views** tab, in the **Year** drop-down list, select the year for which you want to add information. To display all years for which you have statistics the selected view, select **Show All**.
5. Click **Add**.
6. Enter the information in the available fields and click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit.**
4. Click on the **Statistics Views** tab.
5. In the **Year** drop-down list, select the year for which you want to edit information. To display all years for which you have statistics for the selected view, select **Show All**.
6. Click **Edit**.
7. Make the necessary changes in the available fields, and click **OK**.

Setting Up Statistics Views in Organizations

Statistics Views let you view statistics information based on customized views that you set up. On the **Statis tics Views** tab, you can set up new Statistics Views or edit or delete existing ones.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Statistics Views** tab, then click **Add View**.
5. On the **Options** tab, in the **View Name** field, enter the name of the view. For example, if you want to create a view that only includes information on Baptisms, enter "Baptisms."
6. Click the **Grid** tab.
7. Under **Settings**, select the options for the grid.

- **Auto Size Column Width** --- Select to automatically resize the columns to the maximum width of the grid.
- **Show Grid Lines** — Select to display grid lines between records in the grid.
- **Use Column Filtering** — Select to apply a filter to the data that displays in the grid. Click the **Down** arrow to filter on a single value in the column, or click the **Custom** option to filter on multiple criteria.

8. Under **Fields**, select the fields you want to display in the grid.
9. **Optional:** Use the **Up** and **Down** buttons to arrange the fields in the order you want them to display in the grid.
10. Click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. In the View/Edit Organization window, click the **Statistics Views** tab.
5. In the **View** drop-down list, select the view you want to edit, and click **Edit View**.
6. On the **Grid** tab, under **Settings**, select the options for the grid.
   - **Auto Size Column Width** — Select to automatically resize the columns to the maximum width of the grid.
   - **Show Grid Lines** — Select to display grid lines between records in the grid.
   - **Use Column Filtering** — Select to apply a filter to the data that displays in the grid. Click the **Down** arrow to filter for a single value in the column, or click the **Custom** option to filter for multiple criteria.
7. Under **Fields**, select any fields you want to add, or clear any fields you no longer want in the view.
8. **Optional:** Use **Move Up** and **Move Down** to arrange the fields in the order you want them to display.
9. Click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click the **Statistics Views** tab.
5. In the **View** drop-down list, select the view you want to edit, and click **Delete View**.
6. When the confirmation message displays, click **OK**.

Filtering Statistics Views in Organizations

You can apply a filter to a statistics view to further customize the information that displays. This could be helpful if you want to see which fields are blank over several years so that you can enter statistics information for them.

You can also set up a custom filter to view statistics information by. For example, you may want to see the statistics for the years 2004 through 2009, but do not want to view each year at a time or display all years' statistics.

Graphing Statistical Views Information

You can use your Organizations statistics fields to create Detail and Multi-Year graphs. You can also graph by statistical years to track trends.

Printing and Exporting Statistical Views Information

You can print a statistics view or export it to a Microsoft® Excel® or HTML document.

When you print a statistics view, the information displays just as it does on the grid. When you export to Excel, all fields are configured in Excel as General fields so you can edit them. When you export to HTML, you cannot edit the fields unless you open the file with a program that allows editing of .htm files or you right-click on the document and click **View Source**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to print statistics for, then click **View/Edit.**
4. Click on the **Statistics Views** tab.
5. In the **Year** drop-down list, select the year for which you want to view statistics. To display all years for which you have statistics in the selected view, select **Show All**.
6. In the **View** field, select the view you want to display.
7. Click **Print**.
8. Click to print.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to export statistics for, then click **View/Edit**.
4. Click on the **Statistics Views** tab.
5. In the **Year** drop-down list, select the year for which you want to view statistics. To display all years for which you have statistics, select **Show All**.
6. In the **View** field, select the view you want to display.
7. Right-click the grid, and click **Export to Excel** or **Export to HTML**.
8. Enter a file name and click **Save.**

The Groups Tab in Organizations

The Activities tools in ACS are a great help for tracking committees, skills, talents, and participation opportunities within your organization. For example, University Church is involved in two Organization Church Ministries activities, Crisis Closet and Deaf Ministry. You could track that involvement on the **Groups** tab.

ACS provides tremendous flexibility in setting up activity groups. Each activity must be associated with a category. In addition, there are three elements that can further detail the activity. All are user-defined. Only Element 1 is required to be used. In addition to elements, there are options for comments, dates, and numbers.

Activities can also provide a historical record for which organizations have served in different capacities. How much history you keep is up to you. ACS does not limit the detail you can keep.

The **Groups** tab displays the activity groups in which an organization is participating and allows you to add the organization to new groups, edit the activity record, or delete the activity item. You can also print a list of activities.

Activities are set up in Group Setup. Before setting up your activities, it is helpful to lay out your structure on paper to make sure it is logical and makes sense.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Add Organization to a Group** and click **Go** .
3. Select the organization, and click **View/Edit**.
4. Click **Add**.
5. In the **Master Group** drop-down list, select the master group that includes the category you want.
6. In the left pane, select a category.
7. In the right pane, make the appropriate selections. Available choices depend on how the activity was set up.

Using Quick Entry for Organizations Activities

Quick Entry is an easy and fast way to add activities to an organization. Once you become familiar with the categories found in each Master Group, Quick Entry for Activities can save you time.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Add Organization to a Group** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click **Quick Entry**.
5. In the drop-down list, select the appropriate **Master Group**.
6. Select the categories and elements you want to add, then click **OK**.

The Document Library Tab in Organizations

The Document Library tab is a tool you can use to keep track of files associated with a particular organization. You can create a document library for each organization within your database. For example, you could use the Document Library to store an organization's monthly reminder letters, welcome letters, and monthly newsletters.

You can import existing documents into the Document Library, or if you have Microsoft Word or Excel installed on your workstation, you also can create a New Microsoft Word or Microsoft Excel document from the Document Library.

Once your documents are in the Document Library, you can view, edit, or delete them as needed.

Creating or Importing Documents for the Organizations Document Library

You can create a new Microsoft® Word document or Microsoft® Excel worksheet for an organization from the document library. You can also import a file to include in the document library.

After creating or importing these documents, you can open them and edit them as necessary.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click the **Document Library** tab.
5. Click **New Word Document** or **New Excel Document**.
6. In the **Word Document Name** or **Excel Document Name** field, enter the name of the new document.
7. Click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click the **Document Library** tab.
5. Click **Load From File**.
6. Select the file you want to import to the Document Library, and click **Open**.

Editing and Deleting Documents in the Organizations Document Library

After creating or importing your document, you can open it to view the contents or make any changes.

You can also delete documents you no longer need. The document is deleted from the Documents window and from the acsdata/acsrpts directory.

The Picture Tab in Organizations

On the **Picture** tab in View/Edit Organization, you can upload a picture to an organization's record. For example, you could upload an organization's logo or a picture of an organization's members or building, if applicable. Once a picture is uploaded, you can view it in ACS People Suite and in Access ACS.

Using Add/Edit Pictures, you can configure your image editing software to work with ACS so that you can edit and save pictures without having to upload them again. If you want to use the organization's picture in another document, you can even export the picture to your computer's hard drive or your church's network drive. You can also print the picture on the Organization Profile report.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Picture** tab, click **Add**.
5. When the Add/Edit Pictures window displays, click **Import**.
6. Select the picture you want to add from your computer or network and click **Open**.
7. In the Add/Edit Picture window, click **Close**. Once you close the window, the picture you added displays on the **Picture** tab.

Configuring and Editing an Organization's Picture

You can edit an organization's profile picture using your image editing software without exiting ACS. For example, if you notice that individuals in an organization's picture have red eyes, you can correct the red eyes in the picture from within ACS, without having to export the picture, correct the redeye, and import the edited picture.

Before editing an image, you must first configure your image editing software for each user who works with pictures, but you'll only need to do this once. When you've configured your image software, you can edit any organization's image. When you click Edit, the image will automatically open in your image editing software. Configuring your image editing software involves selecting your software's executable (.exe) file in ACS.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit.**
4. On the **Picture** tab, click **Edit.**
5. When the Add/Edit Pictures window displays, click **Configure**.
6. In the **Image Editor Executable** field, click **Lookup** .
7. Navigate to the folder where your image editing software is stored, select the executable (.exe) file, and click **Open.**
8. In the Configuration window, click **OK**.

The Connections Tab in Organizations

In the Organizations module, the **Connections** tab links with the Connections module so that information does not have to be re-entered. You must have the Connections module in order for the **Connections** tab to display.

The **Connections** tab provides a method to track contacts made to your organization's events by individuals and organizations. It also tracks contacts made from your organization to individuals and organizations. Connections can be used for tasks you may not typically think of for the module. For instance, you can use Connections to track a ministerial candidates process. Using the **Connections** tab, you have a complete system for recording and tracking information to assist your organization with providing a successful outreach/inreach Ministry.

The first step of using Connections is adding organizational contacts. You can add both inward (within your organization) or outward (from outside of your organization) contacts.

Once you add contacts, you can select callers or teams (set up in Connections Define Lists) who make the contacts you added. You can assign individual callers to make contacts, or you can assign a team of callers to make contacts. Then, you can track responses, which are reactions to the contact or information learned from the contact.

If you use Connections often, you may want to set up and assign templates for frequent contacts.

Working with Organizational Contacts

Adding contacts is the first step of using Connections for Organizations. Once you add contacts, you can add callers or teams who complete the contact and responses to denote the organization or contact's reaction.

You can also make an inquiry into a contact. Inquiry links the Organizations module with the Connections module in order for you to view a calendar of contacts for a month.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Add Connection** and click **Go** .
3. Select the organization you want to add a contact for, then click **View/Edit**.
4. On the **Connections** tab, click **Add**.
5. On the **Details** tab, enter the information for the contact.
   - **Inward** — Select if the contact is within the organization.
   - **Outward** — Select if the contact is to another organization or outside of your organization.
   - **Date** — Select a date in which the contact is taking place.
   - **Type** — Select a type for the contact. Types are set up and defined in the Connections module using Define Lists, which you can access by placing your cursor on **Type**. When it becomes a hyperlink, click on it. You must have the correct security clearance for the hyperlink to display.
   - **Open Category** — This is a user-defined category that you can tailor to suit your organization.
   - **Comment** — Enter a comment or additional information about the contact.
6. To select callers for the contact, click **Select Caller**. In the left pane, select an individual and click Add . Repeat this step to select all the individuals you want as callers for this contact and click **Close** . You can also select a team for the contact. To select a team, click **Select Team**.
7. Select a team from the drop-down list and click **OK**.

Working with Callers on the Organizations Connections Tab

Callers are the people who make the contacts that you are tracking. They are selected from the People database. You can assign individual callers to make contacts, or you can assign a team of callers to make contacts. Caller Teams are set up in **Define Lists**.

In order to add callers to a contact, you must have a contact already added. After adding a contact, you can assign callers to it. If you have added a caller to a contact and then the caller cannot be a part of a contact for whatever reason, you can remove the caller from the contact.

After the callers make a contact, you can enter responses for the contact.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to assign callers for and click **View/Edit**.
4. On the **Connections** tab, select the contact to add callers to and click **Edit**.
5. Click **Select Callers**.
6. Select an individual from the database list on the left and click **Add** to move the name to the **Selected Callers** List on the right.
7. Repeat step 6 to add more individuals, then click **Close**.
8. In the Add/Edit Contacts window, click **OK**.

Working with Responses on the Organizations Connections Tab

Responses are the reactions to the contacts by the person or group being contacted. Responses can also be types of information learned from the contacts. Some examples include new resident, hearing impaired, or request contact with a pastor. These responses can help you track new or prospective members, special needs and requests, and friends of your organization.

Once the caller(s) or team completes the contact, the responses from that contact can be entered. The responses you choose from are set up in Define Lists. You can remove a response to a contact after it has been entered.

Working with Templates on the Organizations Connections Tab

Templates are tools you can use for setting up contacts that are used most often. It is an easy format that has already been arranged for you. Contact templates are set up in the Connections module, but can be accessed and used from the **Connections** tab in the View/Edit Organization window.

Often, contacts with your organization follow a pattern or schedule. You can set up a template to help you record these scheduled contacts. You can enter one classification and record all the predefined scheduled contacts for you. Contact templates can assign certain standard task schedules for following up on a contact.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Add Connection** and click **Go** .
3. Select the organization you want to assign a contact template for and click **View/Edit**.
4. On the **Connections** tab, click **Add**.
5. Click **Select Caller** or **Select Team** to select an individual or a team to make a contact.
6. To add a caller, select an individual in the left pane and click **Add**. Click **Close**. To select a team, from the drop-down list, select a team and click **OK**.
7. Click **Assign Template**.
8. Select a template from the drop-down list and click **OK**.
9. When the confirmation message displays, click **OK**.

The Sponsors Tab in Organizations

Sponsors are established churches and organizations that help new churches and/or missions get started. Sponsors may provide help for new organizations by providing financial assistance, staff, building space, mentoring services, and more.

Sponsor information, including the Sponsor's Name and Relationship, is stored on the **Sponsors** tab in the organization's record. On this tab, you can add a new sponsor to an organization's record or edit existing sponsor information. You can also delete sponsor information from an organization's record.

Relationship is a user-defined field. To add relationship types, in the Add/Edit Sponsored By Records or Add/Edit Sponsors Of Records window, click the **Relationship** hyperlink or press the **Insert** key after clicking in the drop-down list.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. On the **Sponsor** tab, under Sponsored by, click **Add** or **Edit**. The Add/Edit Sponsored By Records window displays.
5. In the **Start Date** field, enter a date. When adding a sponsor, by default the **Effective Date** displays.
6. **Optional:** In the **End Date** field, enter a date.
7. To select the sponsor organization, in the **Sponsor** field, click **Lookup** .
8. Select an organization and click **OK**.
9. Select a **Relationship** from the drop-down list defined in Define Lists.
10. **Optional:** To enter extra information about this sponsorship, use the Notes field.
11. Click **OK**.

The Comments Tab in Organizations

Comments are pieces of information you want to keep track of, but that cannot be contained in a list or field. You can enter any text in a comment, such as directions to an organization, any special circumstances, etc. You can select a comment type and date for each comment.

You can set up Comment Types in People Define Lists. Examples of comment types include Church Facility, Directions, Camp Sponsorships, etc. You can also select Comment Dates, which automatically default to the current date.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to add a comment for and click **View/Edit**.
4. On the **Comments** tab, click **Add**.
5. Enter the information for the comment.
    - **Comment Date** — Enter the appropriated comment date or select a date from the drop-down list. The current date is the default.
    - **Comment Type** — Select how you want to categorize different types of comments from the drop-down list.
    - **Comment** — Enter the comments you want to display for the chosen Comment Type. The comment length is unlimited.
6. Click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose comment you want to change and click **View/Edit**.
4. On the **Comments** tab, select a comment and click **Edit**.
5. In the **Comment** field, change the comment. Or, select a new date or comment type.
6. When finished, click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose comment you want to delete and click **View/Edit**.
4. Click on the **Comments** tab.
5. Select a comment and click **Delete**.
6. When the confirmation message displays, click **Yes**.

Working with Filters in Organizations

Filters are used to create a subset of your database. For example, you can create a filter to show only the organizations established in a particular year, and then you can use this filter as you work with Organization records so your Find Organization window displays only those organizations.

You can save filters and use them again without having to recreate the specifications each time, which is very useful when printing reports. You can access filters in the Find Organization window.

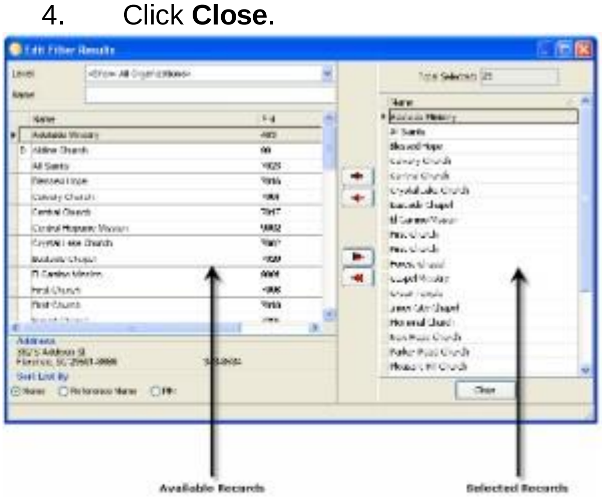
Creating Filters in Organizations

You can use filters to limit the records that display in the Find Organizations window.

After creating a filter, you can use the Edit Filter Results window to add or remove organizations from filter results, which is helpful for reporting purposes. You can also print the filter results or save and load the filter for future use.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. In the Find Organization window, click **Filter**.
4. **Optional:** Enter a description for the filter in the **Filter Description** field.
5. **Optional:** In the **Filter Date** field, select the desired date for the filter. This option affects date related filters. For example, if it's July and you want to know all organizations that will be 20 years old or older as of September 1, set the filter date to 9/1. Then, when you select **Date of Inception - Age** to 20, your filter returns the appropriate organizations.
6. Under **Available Fields**, select the field you want to filter for, then click **Add**.
7. Select the appropriate filter options for your selection and click **OK**.
8. Repeat the previous steps to include additional filter fields.
9. Click **Apply**. The filter results display in the Find Org window.

1. After the filter is applied, under **Show Results For** in the Find Organization window, click **Edit**.
2. To add an organization record to your results, select a record from the left pane and click **Add** . To remove an organization record from your results, select a record from the right pane and click **Remove** .
3. Repeat this step to add the organization records you want to your results. To add all the records to your results, click **Add All** . To remove all the records from your results, click **Remove All** .
4. Click **Close**.



1. In the Edit Filters window, click **View Results**.
2. Click **Print**.
3. To print the filter results, click **Print** .
4. Click **Close**.
5. **Optional:** To apply the filter to your Organizations records, click **Apply Filter**.

Saving and Loading Filters in Organizations

You can save the filters you create so you can use them again later. A saved filter saves the criteria, not the results, so each time you load and apply a saved filter, you get results based on your current data. Saved filters can be **Private** (for your use only) or **Public** (for use by all ACS users in your organization).

If you have saved filters, you can load them instead of having to set them up each time you need the information.

1. Create the filter you want to save.
2. In the Edit Filters window, click **Save**.
3. In the **Title** field, enter a descriptive name for the filter.
4. Select **Public** if you want to share this filter with other ACS users.
5. Click **Save**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations**, then click **Go** .
3. Click **Filter**, then **Load**.
4. Select the filter you want to use from the **Saved Filters** list, then click **Load**.

Deleting and Deactivating Organization Records

You can delete an organization from your records if it does not have contributions transactions for the current year attached to it.

Deactivating an organization's record is a good alternative to deleting the record. Inactive organizations still exist in your ACS database, but records display in the Find Organization window with a **D** to the left of the name as a reminder that the record is deactivated.

> **Caution**
>
> Deleting an organization permanently erases an organization from your records. Unless you have the same organization entered twice, a better option may be to deactivate the organization.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Delete Organizations** and click **Go** .
3. Click **Find Organization**.
4. Select an organization and click **OK**.
5. Click **Delete Selected**.
6. When the confirmation message displays, click **Yes**.
7. In the **Reason** field, enter a reason for the deletion and click **OK**.
8. When a message displays stating that all records for the organization have been deleted, click **OK**.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to deactivate, and click **View/Edit**.
4. Under **Name Information**, select the **Inactive** checkbox.
5. Click **Ok**.

Mass Changing Records in ACS Organizations

Mass Change provides a powerful tool for cleaning up, correcting, or changing data in your records. This feature is available for ACS People Suite and Organizations clients.

Two change modes are available in Mass Change. Your Change Mode selection determines which fields change and the window's appearance.

- **Change Field Value** — To replace the data in a selected field with new information, select this option. You can change records based on search results, filter results, or an entered value.
- **Move Field —** To move the data in a field to another location, select this option.

When you need it, Mass Change can be a terrific time-saver. However, if you don't use the feature properly, you can make a big mess. You can also limit user security settings so that only administrators have access to this feature.

Organizations Reports

The Organizations module has many reports that you can print, preview, or export. Organizations reports contain information about your organizations, and some organizations reports interface with other modules in the ACS People Suite.

Each report type has many customization options, including the ability to print a report based on your last Search results. Because of these customization options, you can print each report in a variety of different ways.

We recommend experimenting with each report and examining the options available for each one.

The following report types are available in the Organizations module:

- **Labels —** You can print labels from the ACS Reports window.
- **Connections** — You can print various reports using information in the Connections module from the ACS Reports window.
- **Contributions** — You can print a variety of extracts, lists, statements, and statistics information in the Contributions module from the ACS Reports window.
- **Directory —** You can print several types of directories for your organization including a Document Library directory and Organization Profile.
- **Extracts** — You can extract information in a format that you can use with another software application.
- **Lists —** You can print a variety of lists from the ACS Reports window.
- **Statistics** — You can print various statistics reports from the ACS Reports window.

Customizing Organization Labels

You can use the **Layout** and **Settings** tabs to customize Organization labels.

Use the **Layout** tab to select which fields and information display on your label, view label options, save and load label templates, and configure your labels for Basic Bulk Mail. Use the **Settings** tab to customize the information that prints on labels and the sort order.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go**.
3. Select the label you want to design and click **Customize**.
4. On the **Layout** and **Settings** tabs, select the desired options. To learn about the options, see the Additional Field Information below.
5. Click **Preview**.

Quarterly Statements in Organizations

The Quarterly Statement is a highly customizable report designed for upper-level organizations to generate a quarterly statement detailing selected fund and pledge groupings for their sub-organizations. This report enables you to format the statement for your organization's specific needs.

Creating the Quarterly Statement requires a solid understanding of right-click and drag-and-drop functionality. If you have never formatted a report using drag-and-drop or right-click options, you should familiarize yourself with these functions before setting up the Quarterly Statement.

Here are the steps for setting up Quarterly Statements:

- Plan your desired statement layout carefully before you begin formatting.
- Decide whether to use Pledge Groupings or Fund Groupings, then set them up.
- Set up Headings and Subheadings on the Report.
- Set up and print your Quarterly Statement.

Mapping out Quarterly Statements in Organizations

Because headings, subheadings, and funds print in the order that you add them during setup, it is a good idea to map how you want to organize the headings, subheadings, and funds before you begin setting up the report.

Funds print differently depending on whether they are set up under a heading, a subheading, or on their own.

Example 1

You set up a heading of **Memorials** with the John Brown Memorial Fund, the Gladys Green Memorial Fund, and the Martha Moore Memorial Fund under it. The organization you are printing the Quarterly Statement for did not contribute to any of these memorial funds.

On the report, you will see the heading **Memorials**. Under that heading, you will see **Memorials Total** with zero dollar amounts across the report.

Example 2

You set up a heading of **Memorials** with the John Brown Memorial Fund, the Gladys Green Memorial Fund, and the Martha Moore Memorial Fund under it. The organization you are printing the Quarterly Statement for contributed to the John Brown Memorial Fund and the Martha Moore Memorial Fund.

On the report, you will see the heading **Memorials**. Under that heading, you will see the John Brown Memorial Fund and the amount the organization contributed to that fund each quarter and a total amount listed across the report. Next, you will see the Martha Moore Memorial Fund with the amount the organization contributed to that fund each quarter and a total amount listed across the report. Finally, you will see the **Memorials Total** with the total amounts for each quarter and a total for the year listed across the report.

Example 3

You set up a heading of **Outreach** with a subheading of **Missions** and a subheading of **Missionaries**. You have several different mission funds listed under the Missions subhead and several missionary funds listed under the Missionaries subhead. The organization you are printing the Quarterly Statement for contributed money to several mission funds and several missionary funds.

When the report prints, you will see the heading **Outreach**. Under that heading, you will see the subheading **Missions** with the total amount the organization contributed to mission funds for each quarter and a total amount for the year listed across the report. Next, you will see the subheading **Missionaries** with the total amount the organization contributed to missionary funds for each quarter and a total amount for the year listed across the report.

Example 4

You have selected to print all of the funds that are available to print, but there are no headings or subheadings. The organization you are printing the quarterly statement for only contributed money to two funds.

When the report prints, only the information for those funds the organization contributed to will print.

Setting up Fund Groupings on the Quarterly Statement

You can set up Fund Groupings to print on the Quarterly Statement.

Before setting up the report

Because headings, subheadings, and funds print in the order that you add them to the setup, it is a good idea to map out how you want to organize the headings, subheadings, and funds first.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under **Organizations**, expand **Contributions**, then **Statements**.
4. Select the **Quarterly Statement** and click **Customize**.
5. Click on the **Report Options** tab.
6. Under **Contributions Options**, select **Use Fund Groupings**, then click **Select**.
7. Set up Headings and Subheadings.
8. Under **Funds**, click the fund you want to print information for, then drag the fund to the **Layout** field and drop it there. If you want the fund to be listed under a heading or subheading that you have already set up, drag the fund to the heading/subheading you want to put the fund under and drop it when the heading/subheading is highlighted.
9. Repeat the previous step for each fund you want to include.
10. Click **Return**.
11. To display the report, click **Preview**.

Setting up Pledge Groupings on the Quarterly Statement

When printing the Quarterly Statement, you must select to use either Fund Groupings or Pledge Groupings. If you select to use Pledge Groupings, you can select which funds you want pledge information to print for. The funds print on the report in the order that you add them during setup.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under **Organizations**, expand **Contributions**, then **Statements**.
4. Select the **Quarterly Statement** and click **Customize**.
5. Under **Contributions Options**, select **Use Pledge Groupings** and click **Select**.
6. Set up Headings and Subheadings.
7. Under **Funds**, click the fund you want to print information for, then drag the fund to the **Layout** field and drop it there.
8. Repeat these steps for each fund you want to print.
9. Click **Return**.

Setting up Headings and Subheadings on Quarterly Statements

You can set up headings to group funds under on the Quarterly Statement.

After you set up headings, you can set up subheadings to group funds and display summary totals on your report. To create groups, select a fund, then click **Add Heading**. To create sub groups, click on an existing group, then click **Add Subheading**. Then, use the arrows to add and remove funds from the selected group, or click and drag the funds into the **Layout** pane.

> **Before setting up the report**
>
> Because headings, subheadings, and funds print in the order that you add them to the setup, it is a good idea to map out how you want to organize the headings, subheadings, and funds first.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. In the upper sidebar, expand **Contributions**, then **Statements**.
4. Select the **Quarterly Statement** and click **Customize**.
5. Under **Contributions Options**, select **Use Fund Groupings** or **Use Pledge Groupings** and click **S elect**.
6. In the Fund Grouping window, right-click in the **Layout** pane.
7. Click **Add Heading**.
8. Enter a name for the heading and click **OK**.

1. Set up your fund headings.
2. In the Fund Grouping window, right-click on a heading in the **Layout** pane.
3. Click **Add Subheading**.
4. Enter a name for the subheading and click **OK**.

Setting up Quarterly Statements in Organizations

Creating the Quarterly Statement requires a solid understanding of right-click and drag-and-drop functionality. If you have never formatted a report using drag-and-drop or right-click options, you should familiarize yourself with these functions before setting up a Quarterly Statement.

> **Dragging and Dropping**
>
> When you drag-and-drop a selection to a heading or subheading, you must drop the selection directly on top of the heading or subheading to list it appropriately.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under Organizations, expand **Contributions**, then **Statements**.
4. Select **Quarterly Statement** and click **Customize**.
5. On the **Report Options** tab, select the **Organization Level** you want to display the report for and the **Organization Report Options** you want to use.
6. Under **Contributions Options**, select **Use Fund Groupings** and/or **Use Pledge Groupings**.

7. **Optional:** Under **Contributions Options**, edit the information in the Message field.
8. Under Date Selection, in the **Analysis Date** field, enter the date you want the information to print for. For example, if you only want to see information through March 31, enter the date 03/31/Year.
9. **Optional:** To include staff positions in the statement, under **People Options**, select **Selected Staff Positions** and click **Select**.
10. **Optional:** Under **Formatting Options**, select the format options you want to use.
11. **Optional:** Select **Use Last Search Results** to see only information for the organizations included in your last search.
12. To view the statement, click **Preview**. To print the report, click **Print Report** .

Deleting Groupings on the Quarterly Statement

You can delete Fund or Pledge groupings from the Quarterly Statement setup.

> **Be Careful**
>
> If you select a heading or subheading to delete, all funds under the heading or subheading are deleted.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. In the upper sidebar, expand **Contributions**, then **Statements**.
4. Select the **Quarterly Statement** and click **Customize**.
5. Under **Contributions Options**, click **Select** beside the **Use Fund Groupings** or **Use Pledge Groupings** checkboxes.
6. To delete only one fund: Under **Layout**, right-click on the fund and click **Delete**.
7. To delete a subheading grouping: Under **Layout**, right-click on the subheading and click **Delete**.
8. To delete a heading grouping: Under **Layout**, right-click on the heading and click **Delete**.
9. Click **Return**.

Setting up the Custom Totals Report

The Custom Totals Report enables you to customize a report that contains Contributions or Special Fields information that you define.

Before previewing or printing the Custom Totals Report, you must select from the available columns. If you do not select columns, the report only displays a list of selected organizations.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under **Organizations**, expand **Contributions** and then **Lists**.
4. Select the **Custom Totals Report** and click **Customize**.
5. On the **Report Options** tab, select the options you want. See the Additional Field Information below to learn more about each option.
6. Under **Formatting Options**, select **Columns** and click **Select**.
7. In the **Column Type** drop-down list, select the first column that you want to print on the report. You can select from **Special Fields**, such as Geographic Zone or E-mail and from Contributions fields, such as Initial Payment or First Quarter Total.

8. To add this column to the Defined Columns window, click **Add** . If you select any of the Contributions fields, you can also select the funds from which information displays. If you select funds for a Contributions field, you can update the selected funds from the Custom Column Setup window by selecting the **Contributions** field from the **Defined Columns** box and clicking **Update Funds**.
9. **Contribution Information Only:** Select from among the available funds in your data. Only information for the selected funds display on the report. Click **Return** when you are finished.
10. Click **Return**, to save your selections.
11. To view the report, click **Preview**.

Setting up the Organization Profile Report

The Organization Profile Report is part of the Directory reports. However, the available options differ from all other Directory reports.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under **Organizations**, expand **Directories**.
4. Select **Organization Profile** and click **Customize**.
5. On the **Report Options** tab, select the customization options you want, then click **Preview** to display the report.

Performing an Organization Extract

Use Organization Export for a quick way to export specific information to other programs and share with others.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Expand the **Extracts** report type, select **Organization Extract**, and click **Customize**.
4. On the **Format** tab, under **File Format**, select the format to save the export as.
5. Under **File Name**, click **Lookup** .
6. Select a destination and enter a file name for the export and click **Save**.
7. On the **Settings** tab, select the options you want for the export.
8. Under **Organization Options**, in the **Level** drop-down list, select the level of the organizations to gather information from.
9. Review your selections on the Settings tab before proceeding, then click the **Layout** tab.
10. Under **Available Fields**, select a field to export. Click to add the field to Export Fields or to add all the available fields. Click to remove a field or to remove all fields from Export Fields.

    To move a field up or down in the order to appear in the export, click or .
11. Continue selecting and adding fields you want, then click **Extract**.
12. When the completion message displays, click **OK**.

Selecting the Organization Statistics Report's Layout

The Statistics Report and its extract displays information in a tabular format. You define the rows and columns that display on the report, as well as the subject of the report (the **Grid** option).

You can customize this report in any number of ways. We recommend that you experiment with the different features and layout options in order to determine the options that work best for your organization.

Here are some facts concerning the Statistics Report:

- When defining the Statistics Report, you must define the information that displays in the **Rows**, **Columns** , and **Grid**. You can select from **Organizations**, **Fields**, and **Years**.
- You cannot select more than one option for a row, column, or the grid. For example, you cannot select to have **Organizations** and **Fields** in the **Row**.
- Similarly, you cannot select the same option for more than one layout. For example, you cannot select to have the **Year** display in both the **Column** and the **Grid**.
- Once a row and column are defined, the grid automatically adjusts to the remaining option. You can select the desired subject of the report from the **Grid** drop down list. For example, if you select **Organizations** as the **Row** and **Year** as the **Column**, then the **Grid** drop-down list displays available **Fields**.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under **Organizations**, expand **Statistics**.
4. Select **Statistics Report** and click **Customize**.
5. Click on the **Report Options** tab.
6. To select the rows or columns you want to display on the report, under **Layout**, click the **X** beside **Organization**, **Field**, or **Year**.
7. To select or remove desired organizations, fields, or years, click **Add** or **Remove** , then click **Return**.
8. Select a grid from the **Grid** drop-down list. The choices available depend upon the layout option that remains. For example, if you have defined **Organization** as the **Rows** and **Fields** as the **Columns**, then only **Years** remains available from the **Grid** drop-down list.
9. To view the Statistics Report's layout, click **Preview**.

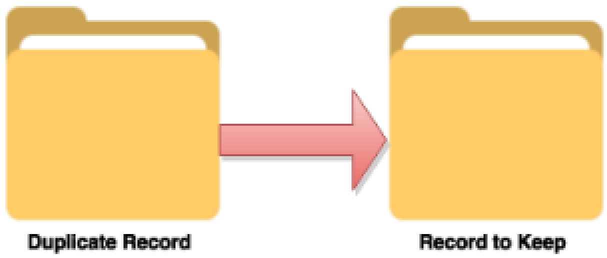
Before you merge two organizational records, you should know which record is the one you want to keep and which one is the duplicate.

How do I know which record is the duplicate?

Typically, the duplicate record contains less information than the other record, and some of the information might not be up-to-date.

You can look at both records in View/Edit Organizations, and compare their information in order to know which one is the duplicate and which one you want to keep.

The information in the duplicate record will be merged into the other record.

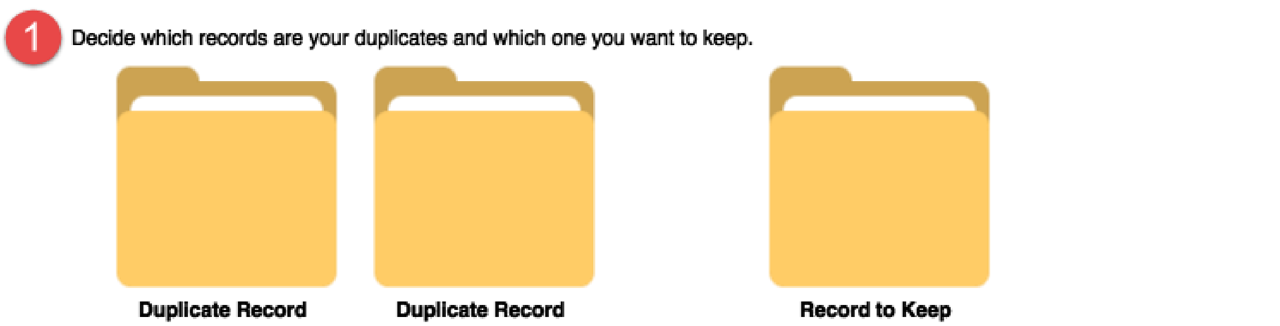


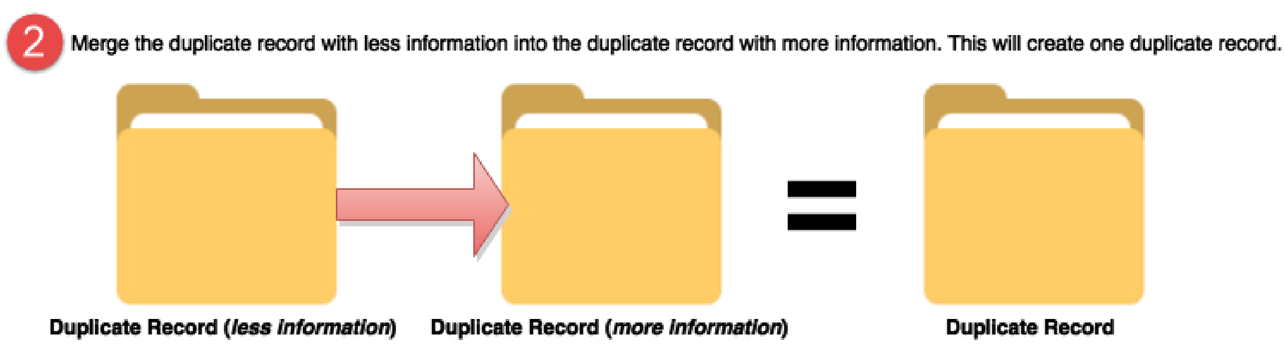
Some information in the duplicate record doesn't transfer to the other record unless the field for that information is blank in the other record.

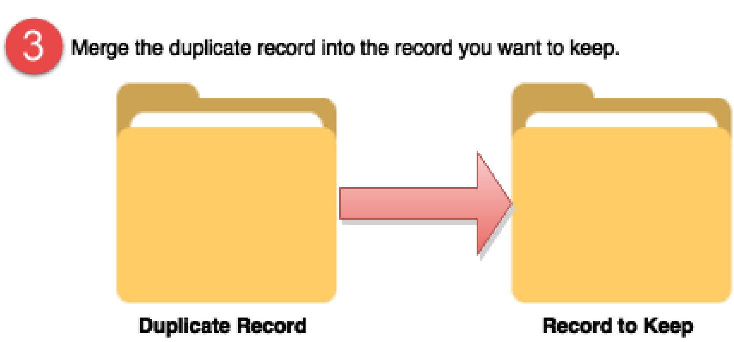
What if I need to merge more than two records for an organization?

Let's say you have an organization with three separate records.

In this situation, you can perform two merges:







Organizations Merge

Have you ever ended up with two records for the same organization? It happens often when more than one person adds records into ACS.

For example, you add an organization record. But, a volunteer in your church adds a record for the same organization without checking first to see if the record already exists in ACS. Now you have two records for that organization, and each record likely contains some information that is different from the other.

With Organizations Merge, you can combine both of those records into one accurate record.

Select Which Organization Records to Merge

Before you merge two organizational records, you should know which record is the one you want to keep and which one is the duplicate.

Identify which record is the duplicate

Typically, the duplicate record contains less information and some information might not be up-to-date.

You can look at both records in View/Edit Organizations and compare their information to know which one is the duplicate and which one to keep.

If there are blank fields in the record to keep, they will be filled with information from the duplicate record during the merge.

How do I merge multiple organizational records?

Let's say you have an organization with three separate records, Records A, B, and C.

In this situation, first you have to determine which records are duplicates and which ones you want to keep:

Record Status	Record Name	Record Description
Original	Record A	The record you want to keep
Duplicate	Record B	Has some helpful information to save
Duplicate	Record C	Has even more information you want to keep
Combined Duplicate	Record D	This is **Record B** merged with **Record C**

To keep all of this valuable information, you'll have to perform two merges.

Merge Organization Records

You should create a backup before merging records.

Also, you can also print the duplicate record's Organization Profile report before you merge, so that you have a copy of the original information.

To merge organization records

1. Under **Manage Records**, click the **Tasks** tab.
2. In the drop-down list, select **Organizations Merge**, and click **Go** . The Merge Organizations window displays.
3. Make your selections, and click **Merge**.
4. After the merge finishes, click **OK.**

How can I prevent duplicate records?

- In your Organization Settings, select one of the Duplicate Checking Settings options.
- Before you add a new organization record, search and make sure a record for the organization doesn't already exist

Organization Merge Information Changes

While the basic rule with merging organization records is that information from the duplicate record flows to the record to keep, you still might have questions about merging certain information.

A high-level organization record can merge into a lower-level organization record as long as the lower level record is under a different parent record.

The merge keeps the oldest date.

Those comments are merged into a single comment.

The address, social media, and profile information will merge during the next upload after the initial merge.

Organization Merge Records Security

You can restrict or grant a user's access to merge organization records.

To restrict or grant access to merge organization records

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. In the Add/Edit Users window, select the user whose People Merge access you want to edit and click **Edit**.
4. On the **Security** tab, expand **People.**
5. Double-click on **Merge Records** to change the security value from **None** to **All** or **All** to **None**.
6. Click **OK**.

The Merge Organizations security rights default to the value used for Delete Organizations.