ACS People Suite – People Module

People

The People module is one of many modules in the ACS People Suite. It is the foundation of the People Suite and shares information with other modules in the suite.

In the People module, you can add and edit individual records, delete, deactivate, or merge records, and print a variety of reports.

People - Startup Outline

Before you begin entering records and working in People, it's important to set up the software correctly. These steps will guide you through this process.

✓ Read the topic Getting Started with ACS People to learn about important steps to take before entering information in ACS People.

✓ Think about the information you want to track in ACS. To help you, we've created a list of questions to think about before setting up ACS, as well as procedures for setting up the options. Thinking about what to track before setting up ACS saves time and is much easier than reorganizing a database after entering records.

✓ Set up initial users and security settings in Add/Edit Users. Everyone who enters data in ACS must have a user record, and security settings control the areas of the software an individual can view or edit. Remember, it is easier to give additional access than take it away.

✓ Use People Setup to customize your ACS People Suite user experience. In this area, you can change family position settings, enable duplicate record tracking, and set up other defaults.

✓ Decide if you want to activate the People Changes Log. This log tracks changes made on an individual's record.

✓ Set up dates, fields, and lists to effectively manage your data in Define Lists. You can also activate additional fields to track items not in Define Lists.

✓ Add families and individual records. ACS records are organized by family, even if a family only has one individual. Once you add a family record, you can add records for each family member.

About the People Module

The People module is one of many modules in the ACS for Windows People Suite. It is the foundation of the People Suite and shares information with other modules in the suite (Organizations, Contributions, Attendance, Checkpoint, Connections, Reservations, Special Mailings, and Church Growth Tools).

Here are some highlights of the People module.

- Virtually unlimited membership information about every individual. In addition to standard fields for addresses, phones, birthdays and so forth, there are dozens of additional fields, including date fields, that can be customized, so information can be tailored to individual organization needs.

- Individual records are grouped by family. Last names and addresses are entered just once for the whole family to speed entry. If different, last names or addresses can be easily changed for an individual, while still maintaining family relationships. Labels print properly for families with members who have different last names.
- Unlimited user-defined categories, such as skills, activities, committees, gifts, etc. Multi-level structure makes it easier and more reliable for you to retrieve the information you need for mailings, lists and so forth. Build or modify groups all at once on-screen.
- Quick access to records by first or last name, or a combination, as well as full picture capability. You can store individual and family pictures for printing in directories and reports.
- Easily tailored areas for denominational preferences of terminology, as well as the type of information recorded. Flexible, so denominational reporting needs can be met, but the local church is not limited to what information or how much information can be kept about the people entered.
- Numerous reporting options, including church directories. Many customization options available on each report. You can also print picture directories, newsletter lists and labels, birthday lists and labels, index cards, Rolodex® cards, custom labels, and more.
- Built-in bulk mail capabilities and mail merge capabilities. ACS fully supports CASS™ address verification and records ZIP + 4, delivery point bar codes, carrier route, and line of travel. ZIP Code, carrier route, and line of travel sorting is supported, plus bar code and endorsement line printing on labels. You can also create personalized letters or reminders quickly and easily, store frequently used letters for fast updating, bulk merge from searches, or create individual letters.

What Should I Track in ACS?

Before entering records into ACS, you need to set up the important information you want to track. To get you going faster, we're going to start with just some basic information. You can come back later and add additional items you want to track.

Answer these questions before setting up ACS. Some questions may be a simple yes or no, while others may require multiple answers, and you should include other staff if necessary when answering the questions.

What terms do you use to identify the relationship between individuals in the database and our organization?

To help you decide, think about what you call:

- Your members
- Those who attend special events or Bible studies, but are not members. Casual
- Visitors

In People, the names of these relationships are called **Member Statuses**. A person's Member Status defines the relationship they have with the organization. Default member statuses are set up in Define Lists, but you can delete any you will not use.

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

2. In the drop-down list, select **People** and click **Go**.
3. In the Define Lists window, under **Fields**, expand **Individual**, then **Lists**.
4. Select **Member Status**. A list of member statuses displays.
   To add additional member statuses, click **Add**.
   To edit a member status description, select the status you want to edit, then click **Edit**.
   To delete a member status, select the status you want to delete, then click **Delete**.

How would you group each Member Status into the 3 larger groupings of Member, Prospect, Other?

In People, you have three large groups: **Member**, **Prospect**, and **Other**. These are called **Record Types**.

Once you choose the Member Statuses you want to use, decide which larger grouping to include each in. For example, First Time Visitor and Repeat Visitor could fall under a larger group called Prospect. Member, Member Non-Res, and Member Watchcare could fall under a larger group called Member.

Larger groupings are helpful in a variety of situations. For example, you are doing a search for everyone who is a Member Status (let's say you have four types of members). Rather than having to list all four in the search, you can just select the Record Type Member.

You can map Record Types to Member Statuses. This allows you to select a Member Status and then ACS automatically fills in the Record Type. You can map Record Types to Member Statuses in People Setup and in Define Lists.

1. In the People Setup window, click **Map Record Types to Member Statuses**.
2. In the right pane, select a **Member Status** and then click **Edit**.
3. In the **Associated Record Type** drop-down list to select the **Record Type** you want to map to this **Member Status**.
4. Click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People** and click **Go**.
3. Expand Individual, expand **Lists**, and select **Member Status**.
4. In the right pane, select a **Member Status** and click **Edit.**
5. In the **Associated Record Type** drop-down list select the **Record Type** you want to map to this **Member Status**.
6. Click **OK**, then **Close**.

How can people join your organization?

In ACS, this information is tracked in **Joined How?** Some examples are **Statement**, **Letter**, **Profession**. Define Lists contains default values for **Joined How?**, but you can edit or delete any you will not use.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People** and click **Go**.

3. In the Define Lists window, under **Fields**, expand **Individual**, then **Lists**.
4. Select **Joined How.** A list of possible joining reasons displays.
    - To add additional reasons, click **Add**.
    - To edit reasons for joining, select the reason you want to edit, then click **Edit**.
    - To delete a reason you do not use, select the reason you want to delete, then click **Delete**.

What terms do you use to refer to your head-of-house and spousal positions?

In ACS, these terms are **Head** and **Spouse**, but you can edit them and use your terminology (For example: Spouse 1, Spouse 2).

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select, **People** and click **Go** .
3. Under **Family Position Settings**, in the **Head of House Description** and **Spouse Description** fields, enter the descriptions you want to use.
4. When finished, click **OK.**

Do couples give as a combined unit, individually, or do some couples give together and other couples give independently of each other?

Couples may give as a combined unit or each give individually. Children can give separately from their parents. If you do not have the Contributions module, the Contribution area is grayed out on the Profile tab.

Make sure you have a list of contributors and their envelope numbers (if you use them), and know what contributors give individually or have a combined giving record to refer to when you start entering records.

Do you want to set up defaults when entering new individual records?

The defaults you can set up are for **Country**, **Member Status**, **Newsletter Flag**, **Newsletter Deliver By**, and **Email Type**. Setting up these defaults means ACS automatically includes the defaults in a new record. This saves you time because you don't have to enter any of that information.

Of course, if any default information is incorrect for an individual, you can edit the option.

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select, **People** and click **Go** .
3. Under **People Default Settings**, select the default **Country**, **Member Status**, **Newsletter Flag**, newsletter delivery method, and **E-mail Type**.
4. When finished, click **OK.**

What special, important information should you track for each individual or family?

ACS People has 12 user defined lists, 4 user defined fields, and 6 user defined dates for each person. You can use these to track information that your organization wants to track. Examples include **Date of Marriage** or **Faith Background**.

ACS People allows you to track up to 3 user defined lists and 3 users defined fields available on the family record. If you add information in one of these fields, it automatically displays on any other records in that family. Examples include **Family Deacon** or **Caregiver**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Under **Fields**, expand **Organization**, **Individual**, or **Family**, depending on who you want to track information for.
4. Expand **Dates**, **Fields**, or **Lists**, depending on the type of user-defined information you want to track.
5. Select a **Not Defined** date, field, or list, then click **Activate Field**.
6. In the **Field Description** field, enter the name you want to display for the field and click **OK**.

Do you need to track individuals who are no longer active in the organization? Do you need to know why and when they became inactive?

Some organizations want to keep names, addresses, and other information about those previously associated with them but no longer active.

If you want to keep an individual's record but not have him or her display in reports, you can deactivate the individual. Examples: the individual moved out of town, moved his/her membership, or hasn't attended services for a specified amount of time. If this information is important, you may want to use a List and Date field to track why the record was deactivated and the date the record was deactivated.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to deactivate and click **View/Edit**.
4. Under **Name Information**, select **Inactive**, then click **OK**.

Do you want to track inter-family relationships in your membership?

You can track this information using **Other Relationships**.

For example, both Tom White and his grandparents, Scott and Ellen Browning, attend your church. Because their last names are different there is no way to know of their relationship unless someone has shared this with you.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .

3. In the Find Person window, select the individual you want to add contact information for and click **View/Edit**.
4. On the **Family** tab, under **Other Relationships**, click **Add**.
5. In the **Related Individual** field, click **Lookup** .
6. Locate and select the individual you want to add as an other relation, and click **OK.**
7. In the **Relationship** drop-down list, select a relationship.
8. **Optional:** To add a reciprocal relationship, select **Add Reciprocal Relationship**, then select the appropriate value from the **Relationship** drop-down list.
9. Click **OK**.

Getting Started with ACS People

Before starting to enter information into People, here are some things that are helpful for you to know.

Before you start entering information, it's important to:

Define terms frequently used
Share concepts behind the People module
Create a checklist of steps to follow in setting up People.

Security in the People module

Security in ACS is based, not just on whether or not you have access to a module, but what options you can access within the module, and what you can do in that option.

Within a module option, security choices are:

- **All** — Allows the user to do anything within the option.
- **View** — Allows the user to only view information found in the option. Occasionally View is not available as a Security choice.
- **None** — The user is not given access to the option. An option usually looks gray compared to other options when a user doesn't have access to it.

You can set up security rights in **Utilities** > **Add/Edit Users**. A grayed option means you do not have access to it, and if you need access, you'll need to go to your church's administrator to ask for it.

The Add/Edit Individuals option is in the People module. Add/Edit Individuals stores names, addresses, phone numbers, and a lot of other information about individuals who have a relationship with your organization.

Your volunteers help out at the office front desk by answering the phone. Members are always asking for addresses and phone numbers, and you want the volunteers to be able to get that information but not be able to change anything.

In ACS People, they are given access to the View/Edit option with View only rights. This allows them to access Add/Edit Individuals but they cannot change or edit any information.

Terminology used in the People module

Understanding terminology used in People will help you correctly set up and use this module. Take some time to familiarize yourself with the following:

- **Active record** — A record that is not deactivated. Active records are automatically included in searches or reports.
- **Activities** — An area in People that allows you track the things individuals participate in (examples: committees, choirs) and their special gifts, skills, or experiences. The Activities area is customized by you using terms and language you are used to.
- **Address Type** — ACS lets you store multiple addresses for an individual. You need to designate the address or addresses to use for the primary address, mailing address and contribution statement mailing address.
- **Deactivated (inactive) record** — A record that is no longer active. Deactivated records are not automatically included in searches, filters, and reports.
- **Mail Merge** — A feature used to create and print Microsoft Word form letters based on search results. Names along with information you specify exports to Word and personalized letters are created during the merge process.
- **Member Status** — This is User Defined List which you can edit using the Define Lists option in the People module. It contains five default elements. The status is used to describe an individual's relationship to your organization.
- **Search** — Similar to doing a query. A search allows you to find names in the database based on criteria you create.

People's Relationship to Other Modules

The People module is the foundation for all other modules in the People Suite so it is important to make sure it correct.

Names, addresses, and other personal information added in People is viewable in many other modules.
Searches can be done on information found in more than one module.
Output into reports, graphs, exports, and mail merge can come from more than one module.

Access ACS

Access ACS is a web based companion to ACS. Data flows back and forth between People and other modules and Access. If you are going to use Access, include its functionality in mind (groups, online giving, outreach, serving, event registration) during set up.

Setting up ACS People

On the **Settings** tab of the People Setup window, you can customize your ACS People Suite user experience.

You can change the default family position settings, set up other defaults (such as delivery by, member status, newsletter flag, and country values), map record types to member statuses, and allow duplicate record checking.

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select, **People** and click **Go** .
3. Select the appropriate **Family Position Settings**, **People Default Settings**, and **Duplicate Checking Settings**. To learn more about an option, see the Additional Field Descriptions below.
4. When finished, click **OK**.

Additional Field Information

Head of Household Description and **Spouse Description** – Enter your organization's preferred terms for the head-of-house and spousal positions in a family. These fields are limited to 15 characters, and any changes you make are reflected throughout ACS.

Default Country – The ACS People module is shipped with a country default of USA. Thus, when you enter new addresses, the country automatically displays as USA. Country information displays when you add or edit an address. Even if the default is USA, you can change individual addresses to another country as you enter them. For example, you may have missionaries or contacts with foreign addresses.

These can be handled as they are entered without changing the default. You can change the default to the country of your choice.

Default Member Status – Select a member status from the drop-down list. When you add a new individual, the **Member Status** field automatically displays your default setting.

Default Newsletter Flag – Select a newsletter flag from the drop-down list. When you add a new individual, the **Newsletter Flag** field automatically displays your default setting.

Default Deliver By – Select an option that describes how you prefer mail delivered, such as by e-mail or by mail. When you add a new individual, the **Deliver By** field automatically displays your default setting.

Default E-mail Type –Select an e-mail type from the drop-down list. When you add a new individual, the **E-mail Type** field displays your default setting. Changes made to this setting affect all users.

You can remove a default value if it no longer fits your needs. To do this, highlight the default information, then press **Delete** on your keyboard

Map Record Types to Member Statuses – Click to map record types to member statuses. Once you finish, you need only to enter the member status when you add a new individual. The mapped record type displays automatically. For example, if you map the Child of Member status to the Other record type, each time you select the Child of Member status, the record type automatically changes from blank to Other.

Default Phone Type – Select a phone type from the drop-down list. The program will set the Default Phone Type to whatever name you use in Define Lists. For example, *mobile, cell,* or *cellular*.

Click to map record types to member statuses. Once you finish, you need only to enter the member status when you add a new individual. The mapped record type displays automatically. For example, if you map the Child of Member status to the Other record type, each time you select the Child of Member status, the record type automatically changes from blank to Other.

Duplicate Checking Settings – When entering new individuals into ACS, **Duplicate Checking** searches your database for individuals already entered with the same name. Changes made to this setting affect all users.

This helps prevent having multiple entries of the same individual, especially when multiple users work in your database. If you have this feature turned on in People Setup, whenever you enter an individual that matches another individual already in your database, the Duplicate Individual window displays the individual's name, address, phone number, and e-mail addresses.

If the individual is not the same person, but just has the same name, you can click **Continue Add** and return to the Add New Family window.

- **None** — Select to turn the Duplicate Checking feature off.
  Name — Select to use Duplicate Checking on both first and last name.
- **Name & Address** — Select to use Duplicate Checking on name and address. Name is checked first, followed by the first ten characters of the address excluding spaces and punctuation.
  Name or Address — Select to use Duplicate Checking on name or address. For example, your database lists Bill Adams, who lives at 555 Iris Dr. and Jerrod Smith, who lives at 254 Wisteria Ln. When you try adding a new record for Jerrod Smith at 555 Iris Dr., the duplicate individuals window displays both Bill and Jerrod's names and addresses.

Working with the People Changes Log

ACS tracks changes made to fields on the Contact Information, Addresses, Profile, Additional Fields, and Family tabs in People. The People Changes Log and Address Change Log display these changes in a grid view, which you can sort, filter, or print.

When you change addresses on individual records, ACS tracks the changes in the Address Change Log. If you change an address, it displays in the change log, and you can print information regarding the change using the Listing of Address Changes report. If an unintended change was made to an address, you can right click on the address and select the **Revert Address** option to correct it.

The People Changes Log tracks the additions of new records from the Start New Family, Add Family Member, and Change Family Unit: Start New options, as well as the Add options in the Family Members section on the Family tab.

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **People** and click **Go** .
3. On the **People Changes Log** tab, select **Activate People Changes Log**.
4. Click **OK**.

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **People** and click **Go** .
3. On the **People Changes Log** tab, click **View Address Log**.
4. Right-click on the address you want to revert, and click **Revert Address**.
5. A confirmation message displays, click **Yes.**

You can also clear the People and Address Change Logs (*archived addresses do not clear*).

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **People** and click **Go** .
3. On the **People Changes Log** tab, under **Clear Log Options**, select **People Changes Log.**
4. Select **All** or **by Date Range**. If you selected **by Date range**, select or enter the beginning and ending date for your date range in the **From** and **To** fields.
5. Click **Clear**.
6. When the confirmation message displays, click **Yes**. A message displays indicating the People Changes Log has been cleared for the selected date range.
7. Click **OK** twice.

Mapping Record Types to Member Statuses

In People Setup and in Define Lists, you can map Record Types to Member Statuses. This lets you select a Member Status and then ACS automatically fills in the Record Type. For example, if you map the Member Status of Child of Member to the Record Type of Other, when you select Child of Member as Member Status, the Record Type automatically changes from blank to Other.

In ACS, each individual must have a Record Type for high-level sorting. Member Status and Record Type are similar and often misunderstood. Some examples of member statuses are resident member, non resident member, prospect, and contributor only.

1. In the People Setup window, click **Map Record Types to Member Statuses**.
2. In the right pane, select a **Member Status** and then click **Edit**.
3. In the **Associated Record Type** drop-down list to select the **Record Type** you want to map to this **Member Status**.
4. Click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People** and click **Go** .
3. Expand Individual, expand **Lists**, and select **Member Status**.
4. In the right pane, select a **Member Status** and click **Edit**.
5. In the **Associated Record Type** drop-down list select the **Record Type** you want to map to this **Member Status**.
6. Click **OK**, then **Close**.

Changing Head and Spouse Descriptions

By default, **Head** and **Spouse** are used for the Family Position descriptions. If your organization prefers a different word choice to describe Head and Spouse, you can change these descriptions in the People Setup window.

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select, **People** and click **Go** .
3. Under **Family Position Settings**, in the **Head of House Description** and **Spouse Description** fields, enter the descriptions you want to use.
4. When finished, click **OK.**

Defining Lists in ACS People

ACS Define Lists lets you set up dates, fields, and lists in ACS so that you can effectively manage your church or organization's data. You can customize Define Lists to suit your organization's unique needs and track the data you want to track in ACS.

In addition, if you want to track an item that isn't set up in Define Lists, you can activate an additional field, add the information you want to track, and track that data for individuals and organizations.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. When the Define Lists window displays, expand the area you want to track information for, then select the field you want to work with.
4. Once you've selected the field you want to track data for, you can:
    - Add, edit, and delete drop-down list items, if the field is a drop-down list.
    - Rename a field.
    - Deactivate the field if you no longer want to track the information.
    - Activate an additional field, date, or list to track additional data in ACS.
5. When you finish working with Define Lists, click **Close**.

Additional Field Information

Under **Fields**, the additional fields you can set up in ACS display. The field you select on the left determines what displays in the right pane of the Define Lists window.

Some of the fields in the **Fields** list, such as **Marital Status**, are required. The descriptions assigned to these fields cannot be changed; however, you can edit the drop-down list elements associated with the fields.

Groups Setup – Displays the Group Setup window. Use activity groups when you want to be able to assign more than one option in a field to an individual's record.

A good example of this is setting up committees, since an individual could be part of multiple committees. If you set up your committees as a list, then you can assign an individual to only one committee in the list. If you set up your committees in Group Setup, you can assign the individual to all committees they are a part of.

Print – Click to print the Define Lists Report. This lists the **Field Type**, **Description**, and **Elements** for all additional fields.

Activate Field – When you select a field, date, or list that is Not Defined, click this button to activate it. To learn more, see Working with Additional Fields, Dates, and Lists in People Define Lists.

Deactivate Field– Click to deactivate a field that you no longer want to use in ACS. Once you deactivate a field, the information you tracked with it is lost and can only be restored with a backup, so be sure to consider that before deactivation.

Change Desc. – Click to give a field a different description to display in ACS. This option is available when you select an active field from the **Fields** list. Renaming a field changes the name of the field throughout the ACS software.

Add – Click to add a list element to the selected field's drop-down list.

Edit – Click to edit the selected list element. When you edit the **Member Status** elements under **Individual** lists, you can also map each status to a **Record Type**. When you edit a list element, the change is applied to all records that reference that element.

Delete – Click to delete the selected list element from the selected field's drop-down list. When you delete a list element, it's removed from all records that reference that element.

Adding, Editing, and Deleting Drop-Down List Items in People

Drop-down lists are used for fields that have a limited number of selections such as marital status and family deacon. Some fields have preset selections to which you may add, while additional, user-defined, drop-down lists contain only the selections that you create.

You can customize the information found in the drop-down lists for user-defined list fields by adding new selections, renaming existing selections, or deleting selection items that are no longer relevant to your church or organization.

Entering Numeric Values

When you create a new list field and want to use numbers, enter leading zeros so the numbers sort correctly. For example, if you enter 1, 10, 15, 2, and 20, you may want to enter these values as 01, 02, 10, 15, and 20 to sort correctly.

Why should I customize drop-down list items?

Customizing drop-down list options lets you track data in ACS more effectively.

Suppose you enter newcomers' information in ACS, and you discover that many individuals who complete an Individual Request for Information form do not specify if they are married, single, divorced, separated, or widowed. You could add a drop-down list item for Not Sure. When entering data, select that option for anyone who leaves their marital status blank on the form.

In addition, you could rename items in a drop-down list if you find that something is misspelled, or if the current field name has a slightly different meaning from how everyone on your staff interprets it. Renaming items in a drop-down list renames them for every ACS user within your church or organization.

You can also delete items from drop-down lists if no one on your staff uses that selection, or if you added an item by accident. After you delete a drop-down list item, that field will be blank for any records where that field contained the item you deleted.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People** and click **Go** .
3. From the **Fields** column, select the **Lists** field you want to add a list item to. You can find list fields under the **Individual** and **Family** sections.
4. Click **Add**.
5. In the Field Description field, enter the field value and click **OK**. To add additional selections, select **Add Another**, then click **OK**.
6. Repeat steps 4 and 5 to continue adding items, or click **Close** to exit Define Lists.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People** and click **Go** .
3. Under **Fields**, select the **Lists** field which includes the list element you want to edit. You can find list fields under **Individual** and **Family**.
4. In the right pane, select the element you want to edit, then click **Edit**.
5. In the **Field Description** field, edit the description for the item and click **OK**. All records are updated to reflect this change.
6. Repeat steps 4 through 5 to continue editing items, or click **Close** to exit Define Lists.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People** and click **Go** .
3. Under **Fields**, click the lists field which includes the list element you want to delete.
4. In the right pane, select the element you want to delete, then click **Delete**.
5. When the confirmation message displays, click **Yes**.
6. To exit Define Lists, click **Close**.

Changing a Field Description in People Define Lists

You can rename a field by changing its description in Define Lists. After you rename a field, the new name displays throughout the software and on any reports you may print or export.

Why rename a field?

You can rename a field to something that's more understandable for you, or to a name that better reflects the data you're tracking. When you rename a field, it's renamed for everyone in your church or organization who uses ACS, so be sure other users understand the change and how you're using it to track data.

For example, you might need to change membership definitions (member statuses) in ACS to meet reporting requirements for your district office or denomination, and you can do this by renaming the field.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. When the Define Lists window displays, click to expand the area that contains the field you want to rename.
4. Select the field you want to rename, then click **Change Desc**.
5. In the **Field Description** field, enter the field's new name, then click **OK**.

Deactivating Fields in People Define Lists

In Define Lists, you can deactivate fields that you don't use in ACS.

Make a Backup

Since deactivating fields clears the field's value from all records, we recommend performing a manual data backup before deactivating Define Lists fields.

Why should I deactivate fields?

When your church or organization set up ACS, maybe you weren't sure what you wanted to track. After staff changes and learning how to use ACS, you may wonder why you're tracking data that no one on your staff uses or lists that are partially filled in or not used at all.

You can also deactivate fields if the data in them is no longer important. For example, suppose several years ago, your church had a blood donor partnership with the American Red Cross. For several years, you tracked many individuals' blood types and blood donor status in ACS, so that when blood donations were needed, you could pull a report and call regular donors.

However, your board voted to permanently end this partnership five years ago. Your church no longer calls members when blood is needed, nor do you ask members for their blood type. Since you've had many newcomers, most records don't even have a blood type recorded. This is a good example of when you could deactivate this field.

What happens when I deactivate a field?

When you deactivate a field, the data in that field is permanently deleted. Deactivating a field also clears the field's value from all records in ACS.
Before you deactivate a field, be sure that no one on your staff nor any other organization (such as a denominational office) you may send data to will need this information in the future.

After you deactivate a field, it becomes a **Not Defined** field in Define Lists, and you can activate it to track other information in ACS.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. When the Define Lists window displays, click to expand the area that contains the field you want to deactivate.
4. Select the field you want to deactivate, then click **Deactivate Field**.
5. When the confirmation message displays, click **Yes**.

Accessing People Define Lists on the Fly

When you place your cursor over some field names while working in ACS, they become hyperlinks. You can click on these hyperlinks to access define lists "on the fly". This is helpful if you're working in ACS and find that you need to add a new list item to a drop-down list, because you don't have to stop what you're working on to add it.

1. In the View/Edit Individual window, on the **Additional Fields** tab, click the link for the additional field you want to access.
2. **Optional:** If the field is not activated, click **Activate Field**.
3. Click **Add** to create the new item in the list.
4. In the Field Description field, enter a description for the new field.
5. Click **OK**.
6. Click **Close** to return to the View/Edit Individual window.

Working with Additional Fields, Dates, and Lists in People Define Lists

Additional Fields, Dates, and Lists let you track information unique to your organization that may not be set up in ACS People Suite. You can customize these to meet your church or organization's needs.

Before entering additional field, date, and list information, it's important to ask yourself a few questions about the information you want to track. Once you've answered these questions, you can activate additional fields, dates, and lists.

Who does the information apply to? Is the data specific to an organization, individual, or family?

You can set up additional fields for organizations, individuals, or families, but it's important to set up the information in the correct category.

For example, if you want to track which deacon or elder is assigned to a family, you can set up a list in the Families category, because every member of that family is assigned to that particular deacon or elder. However, if you want to set up an additional field to track the date an individual was baptized or confirmed, you'd set up a date in the Individuals category, since family members will likely have different baptism or confirmation dates.

Should I use a list, field, or date to track the information?

Depending on the type of data you want to track, choose an additional field under **Lists**, **Fields**, or **Dates**. Not sure which one to use? Here are some examples to get you started:

- **Lists** — Lists store information when there is a limited number of possible entries, such as blood type or school level. These entries are called list items or elements, and you'll select the entry within a dropdown list in the software. For example, if you're tracking a child's school level, you could set up a list called School Level, and add pre-school, grade school, middle school, high school, and college as list items. In addition, if you're working in the software and find that you need an additional list item, you can define the available selections in drop-down lists throughout the software.
- **Fields** — Fields store information when there is an unlimited number of possible entries, such as former church, or health problems. Within ACS, you'll type the information you want to track into a field.

- **Dates** — Dates store the date of a particular event such as a wedding anniversary or graduation. In ACS, you can enter a date or select it on a calendar.

I'm still puzzled. Can you give me some examples?

Suppose your church hosts quarterly blood drives, so you want to track members' donor statuses, their blood types, and the date they last gave blood.

Since blood type and donor status vary by individual, you'll want to track your information under **Individual**. Then, decide if you need to track this information using a date, field, or list. Since there are a limited number of blood types (8), you could set up a List to track blood type, then enter each of the 8 blood types. You could also use a List to track blood donor statuses and enter several selections, such as **Emergency Only**, **Unable to Give**, and **Yes**. Since the date someone last donated blood also varies from person to person, you'd also track this under **Individual**, but you'd use a **Date** to track the information.

Or, suppose you want to track the place of employment for individuals associated with your church or organization. Since individuals could work at one of many businesses or companies, you could set up a field under **Individual** to track this information. Then in View/Edit Individual, you'd enter the individual's workplace in that field.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Under **Fields**, expand **Organization**, **Individual**, or **Family**, depending on who you want to track information for.
4. Expand **Dates**, **Fields**, or **Lists**, depending on the type of user-defined information you want to track.
5. Select a **Not Defined** date, field, or list, then click **Activate Field**.
6. In the **Field Description** field, enter the name you want to display for the field and click **OK**.

Printing the People Fields List

You can print a list of the additional fields and drop-down list elements that are set up in Define Lists. You can also access Groups Setup and print the Activities Group Layout from Define Lists.

Why should I print this list?

It's a good idea to share these lists with new staff members to familiarize them with how your organization tracks information in ACS. The printed lists are also helpful when you want to clean up or rearrange information.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People** and click **Go** .
3. Click **Print.**
4. To print the report, click **Print** .

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People** and click **Go** .
3. Click **Groups Setup**.
4. In the **Master Groups** field, select the master group that includes the categories and elements you want to print.
5. Click **Print.**
6. To print the report, click **Print** .

Setting up Relationship Types in People Define Lists

You can set up Relationship Types to keep track of relationships between different individuals in your organization. Once you set up and assign these relationships, they display on the Family tab in View/Edit Individual, under Other Relationships.

What are relationship types?

Relationship types connect individuals within your congregation who are related to each other but not part of each other's family record in ACS People. For example, you can create a relationship type of Sibling and use it to connect adult siblings who have their own families and family records in ACS. You can also use it to connect grandparents with grandchildren and aunts and uncles with nieces and nephews within your data.

Why should I set up and use relationship types?

With relationship types, you can track relationships outside of an individual's household. Suppose a member of your church passes away, and you view his or her record and find that the individual has several cousins who also attend your church, so you decide to send them a sympathy card for their loss. Without the other relationships defined, you wouldn't have known that they were related.

In addition, relationship types can help you determine who is authorized to pick up children from church. For example, a child's aunt or uncle may be authorized to pick up the child, and although the records would not be in the same family, an other relationship could help you track this, increasing your church's child security.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Under **Fields**, expand **Other**, and then click **Relationship Type**.
4. Click **Add**.
5. Enter the field description. For example, Aunt.
6. To add other relationship list items, click **Add Another**. When finished, click **OK**.

Working with Campuses in People Define Lists

If your church has multiple campuses, you can add them in ACS Define Lists. You can add services and assign fund codes for each campus to track that campus' pledges and contributions.

If a campus becomes inactive, or if services or funds change, you can edit the campus in Define Lists to keep the information in ACS up-to-date. In addition, if you add a service or fund code that is associated with a specific campus, you can attach it to the campus.

If a campus is not assigned to any Contributions batches, you can delete it. All funds and services assigned to the campus still exist in ACS, but are not assigned to the campus after it is deleted. Deleting a campus permanently removes it from ACS. If you may need to access the campus' information later, we suggest editing the campus to make it inactive.

1. In the drop-down list, select **People**, then click **Go** .
2. Under **Fields**, expand **Multi-Campus**, then select **Campus**.

3. Under **Campus**, select the campus you want to edit, then click **Edit.**
4. In the Add/Edit Campus window, change the campus **Description** or **Active** flag, if applicable.
5. To attach a service to the campus:
    - Click on the **Services** tab.
    - Click **Select**.
    - In the Selection window, use the arrows to move your campus' services to the **Selected Services** area.
    - After selecting all of the campus' services, click **Close**.
6. To attach a fund to the campus:
    - Click on the **Funds** tab.
    - Click **Select**.
    - In the Selection window, use the arrows to move your campus' funds to the **Selected Funds** area.
    - After selecting all of your campus' services, click **Close**.
7. When finished, click **OK.**

Working with Services in People Define Lists

In Define Lists, you can add services in order to accurately track contributions for each service. You can also edit a service if you need to change the service's description or make it active or inactive.

If you have a multi-campus church or organization, you can edit a campus' details to attach that service to the campus. You can attach services to multiple campuses.

If a service is no longer being held and is not assigned to a batch, you can delete it. Deleting the service permanently removes it from ACS. If you may need to access a service's details in the future, we recommend you edit a service and make it inactive. Inactive services do not display in grids and drop-down lists.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Under **Fields**, expand **Multi-Campus**, then select **Service**.
4. Click **Add.**
5. In the Add/Edit Service window, in the Service Description field, enter the name or description of your service.
6. If the service you are adding is not active, clear the **Active** checkbox (**Active** is selected by default).
7. To add another service, select **Add Another**, then click **OK**.
8. When you finish adding services, click **OK.**

Adding and Editing Records in ACS People

In ACS People Suite, records are organized by family, even if there is just one person in the family. To add a new record for an individual who is not a member of an existing family, use the **Add New Family** option. When you start a new family, ACS checks the database and alerts you if there is already someone entered by that name if the **Duplicate Checking Settings** are turned on in People Setup. After adding one member of a family, you can add other members to the family.

The main areas for adding and editing records are the Find Person and View/Edit Individual windows.

In **Find Person**, you can view and locate families or family members. You can right-click on the grid to customize which fields display or how records display in the grid, or you can sort the list by family, last name, or first name. Some other tasks you can complete in this window include setting a filter, printing an individual profile, or generating a mail merge letter.

In the Find Person window, click **View/Edit** to access View/Edit Individual. In this window, you can view and edit an individual's personal information. You can also use the arrows to scroll between family members or families.

Adding a New Family

ACS records are organized by family, even if there is just one person in the family. After adding a new family, you can enter additional information on the family member's record in View/Edit Individual, or you can add family members.

If you set up **Duplicate Checking Settings** in People Setup, when you start a new family, ACS checks the database for individuals with that name and/or address. If possible duplicate records exist, a list of them displays when you save the individual's information. If the records are the same person, you can doubleclick on the appropriate record to enter information in View/Edit Individual.

The default value for Record Type is **Member**; however, you can change this value to **Prospect** or **Other** as necessary. In addition, the first family member has the Family Position of **Head**, but you can change this as well.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Add New Family**, then click **Go** .
3. Enter as much information as you can into each of the Add Family fields, including **Active Address**, **Contribution Information**, **Personal Information**, **Mobile Phone Number**, and **E-Mail Address**.
4. To save the new record and add another new family, click **Save/Add Another Family**.
5. To save the new record and then add family members, click **Save/Add Family Member**.
6. To save the new record without adding family members or other new families, click **Save**.

Adding a Family Member

You can use the Find Person window to add a family member to a selected family.

When you add a family member, the **Last Name** is automatically inserted, but you can change it if needed. If a family member has a different last name, an asterisk displays beside their record in the Find Person grid.

If you set up **Duplicate Checking Settings** in People Setup, when you start a new family, ACS checks the database for individuals with that name and/or address. If possible duplicate records exist, a list of them displays when you save the individual's information. If the records are the same person, you can doubleclick on the appropriate record to enter information in View/Edit Individual.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Add Individual to a Family** and click **Go** .
3. In the Find Person window, select a member of the family you want to add someone to, then click **A dd Family Member**.
4. In the Add to Family window, enter the appropriate information for the individual you are adding, then click **Save**.

Printing an Individual Profile Listing

The Individual Profile lists the selected individual's information on the View/Edit Individual tabs, while the Family Profile Listing provides a list of all information found on the View/Edit Individual tabs for a selected individual and their family.

You can print an Individual Profile Listing for each member of a family by clicking **Print Family Profile**, or select an individual and click **Print Profile** to print only that individual's information.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. Select the family whose profile you want to print.
4. Click **Print Family Profile**.

Viewing and Editing an Individual's Record

View/Edit Individual is one of the most important areas of ACS. Here, you can enter an individual or family's personal data, phone, and address information. You can also view information from other areas, such as Groups, or other modules, such as Connections or Attendance, here.

The View/Edit Individual window consists of a series of tabs, but the individual's name is always displayed at the top so you know whose record you are working with. You can also use the arrows to browse family members or advance to the next family. If you are working with filtered data or search results, you browse that subset of your database, not the whole database.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. In the Find Person window, select the individual you want to add contribution information for and click **View/Edit**.
4. To view or enter information, click on the **Profile**, **Family**, **Additional Fields**, **Addresses**, **Contact Information**, **Comments**, **Groups**, **Pictures**, **Label Names**, **Connections**, **Safeguard**, **Staff Positions**, **Departmental Fields**, and **Document Library** tabs.
5. When finished, click **OK** to save your changes and exit View/Edit Individual.

The Profile Tab - Viewing General Information

On the **Profile** tab in View/Edit Individual, you can view and edit the selected individual's general information.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to add contribution information for and click **View/Edit**.
4. In the View/Edit Individual window, click on the **Profile** tab.
5. Enter any new information or make any necessary changes.
6. When finished, click **OK** to save your changes and exit View/Edit Individual.

The Addresses Tab - Entering and Viewing Addresses

The **Addresses** tab displays the addresses stored with this record. On this tab, you can enter, edit, delete, or map the address and specify which addresses are active. You can also select the primary, mailing, and statement addresses.

You can enter as many addresses as needed for a family or an individual. Each address must have a unique address type and may be used as either a Family Address or an Individual Address, but not both. ACS comes with several address types already set up, such as Home, Business, College, Post Office Box, Vacation, and so forth. You can add or edit address descriptions as necessary in People Define Lists.

When you add a new family, the address that you enter is recorded as a Family Address with an Address Type of Home. Within the family record, the Home address field is required and always displays in the Family Address section, even though the address fields may be blank, or Home is not used as an Active Address.

Setting Address Dates in People

You can set address dates for families with at least two different addresses. For example, if a member and his family have a home address where they reside between September and May and a vacation address where they reside between June and August, you can set date ranges for each of those addresses.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the family you want to set address dates for, then click **View/Edit.**
4. On the **Addresses** tab, right-click on any address in the **Family Addresses** field, and then click **Set Activation Dates**.
5. Select the first address you want to set dates for.
6. Enter the start date and the end date, and then click **Set Dates**.
7. When finished, click **Close**.

Activating Primary Addresses

You can set activation date ranges for families that have two different addresses.

For example, if a member and his family have a home address where they reside between September and May and a vacation address where they reside between June and August, you can set date ranges for each of those addresses.

> **Note**
>
> A family must have at least two addresses before you can set address dates.

1. Under Manage Records, click the **Tasks** tab.
2. In the drop-down list, select **Activate Primary Addresses** and click **Go** .
3. In the Set Family Address Activation Date Ranges window, click **Find Person.**
4. Select the appropriate family, then click **OK**. Under Family Addresses, all addresses associated with the selected family display.
5. Click **Activate Primary Addresses**.
6. In the Set Activation Date window, enter the month and day to use when setting primary addresses, then click **OK**.
7. When the confirmation message displays, click **Yes**, then **OK.**

1. Under Manage Records, click the **Tasks** tab.
2. In the drop-down list, select **Activate Primary Addresses** and click **Go** .
3. In the Set Family Address Activation Date Ranges window, click **Find Person.**
4. Select the appropriate family, then click **OK**. Under **Family Addresses**, all addresses associated with the selected family display.
5. Click **Set Dates**.
6. In the Set Address Activation Date Ranges window, select the address you want to set dates for.
7. Under **Set Activation Dates**, enter the **Start Date** and **End Date**, then click **Set Dates**.
8. Repeat steps 6-7 to set activation dates for the entire year. Dates must cover all 12 months of the year.
9. When finished, click **Close.**

1. Under Manage Records, click the **Tasks** tab.
2. In the drop-down list, select **Activate Primary Addresses** and click **Go** .
3. In the Set Family Address Activation Date Ranges window, click **Find Person.**
4. Select the appropriate family, then click **OK**. Under **Family Addresses**, all addresses associated with the selected family display.
5. Click **Set Dates**.
6. In the Set Address Activation Date Ranges window, click **Clear Dates**.

The Family Tab - Adding and Viewing Family Members

People records are organized by family and provide options for storing data at the family level. Use the **Family** tab to view all of the members of the family and quickly access their individual records by doubleclicking on the name. The Family Additional Fields also display, and you can add a family member or an Other Relationship on the tab.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to add a family member for and click **View /Edit**.
4. On the **Family** tab, click **Add Spouse**, **Add Child**, or **Add Other**. The **Add Spouse** option is not available if a Spouse is already in the family. You can right-click in the Family Members grid to customize the column headings.
5. Complete as many fields as possible for the record, then click **OK**.

Additional Field Information

The Family tab displays three Additional Family Lists and three Additional Family Fields, which you can name in Define Lists. Until you define the options, the Not Defined descriptor displays and you can't access the field. When you place your cursor over a List field name, it becomes a link to the Define Lists window, where you can define the drop-down list and the list elements or the field name.

With Family Additional Lists, you define both the descriptor and list elements. For example, many churches use Family Lists to assign a Deacon or Elder to shepherd each family. In that case, you might name a List "Deacons" and set up your Deacon's Names as options (Jack Allen, Bronson Wilson, Jeff Vance, and so forth in the demo data). Because it is a drop-down list, you cannot enter other options. This keeps the data consistent and makes it easier to find all those assigned to a particular deacon, for example, or those with blank records.

With Family Additional Fields, you can enter any information up to 20 characters long, and entries do not have to conform to predetermined lists.

Adding Other Relationships in ACS People

Other relationships are individuals within the church or organization that are related to each other but who are not part of each other's family record.

Other relationships are helpful to track entire families. Today's families look different than the traditional head/spouse setup, so you can use Other Relationships to link grandparents, aunts, uncles, and other family members who help raise a child or could live in the same household. For example, an other relationship could be an aunt, a cousin, or a grandparent, but it could also be a brother or sister who has his or her own family record, or a parent of an adult child that has his or her own family record.

Once you add an other relationship, you can access this individual's record by double-clicking on the person's name.

You can also edit or delete other relationships if you need to, and you can click **Print** to print a listing of other relationships.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to add contact information for and click **Vie w/Edit**.
4. On the **Family** tab, under **Other Relationships**, click **Add**.
5. In the **Related Individual** field, click **Lookup** .

6. Locate and select the individual you want to add as an other relation, and click **OK**.
7. In the **Relationship** drop-down list, select a relationship.
8. **Optional:** To add a reciprocal relationship, select **Add Reciprocal Relationship**, then select the appropriate value from the **Relationship** drop-down list.
9. Click **OK**.

The Additional Fields Tab - Tracking Additional Information

The **Additional Fields** tab displays a number of additional fields that can be customized to the needs of your organization. You can set up these fields in Define Lists.

Once you activate additional fields in Define Lists, you can enter data on the **Additional Fields** tab. Data in these fields is available for reports as a Special Field and can also be used for Searches, Filters, Mail Merges, and Exports. You can also move or change the fields using Mass Change.

Tips for the Additional Fields tab

If part of a field description name is hidden, place your cursor over the name to display the entire description.

Each additional field displayed on the Additional Fields tab links to Define Lists. Use these links to access Define Lists on-the-fly and edit or set up the displayed additional fields.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to enter information for and click **View /Edit**.
4. Click the **Additional Fields** tab and select or enter all the appropriate information in the fields.
5. When finished, click **OK**, then **Close**.

Additional Field Information
Lists There are twelve additional drop-down lists on the **Additional Fields** tab. With lists, in addition to naming the field, you define the list elements that are available for selection. **Fields** There are four additional fields on the **Additional Fields** tab. With fields, you can enter free text up to 20 characters long. Entries do not have to conform to predetermined lists. If more space is needed, consider using comments to record the information. **Dates** There are six additional date fields available on the **Additional Fields** tab. When the date field is defined and activated (in Define Lists), and you enter a date, elapsed time calculates in years and displays to the right of the field. If the elapsed time from the date entered through the current date is less than one year, elapsed time does not display.

The Contact Information Tab - Tracking Phones, E-mails, and Social Media

On the **Contact Information** tab, you can add, edit, or delete an individual's phones, e-mails, and social media information.

You can also select an individual's preferred contact method (Phone Call, E-Mail, or Text Message), print an individual's contact information, or add the individual to preferred contact lists.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual whose phone number you want to add or edit and click **View/Edit**.
4. Click on the **Contact Information** tab.
5. Under **Phones**, click **Add** or **Edit**.
6. In the Add/Edit Phones window, enter the necessary information.
    - **Phone Type** — In the drop-down list, select the type of phone number you are adding or editing. To edit this field's values in Define Lists, place your cursor on **Phone Type** and click the hyperlink. Entries can be up to 20 characters long.
    - **Phone** — Enter the phone number for the individual. Hyphens are automatically inserted in the phone number.
    - **Listed** — Select if the phone number you are adding or editing is a listed number.
    - **Unlisted** — Select if the phone number you are adding or editing is unlisted.
    - **Extension** — If the phone number has an extension, enter it here.
    - **Preferred Phone** — Select if the phone number you or adding or editing is an individual's preferred phone.
    - **Text Message Allowed** — Select if the phone number receives text messages or the individual has granted permission to receive texts from your organizations.
7. When finished, click **OK**.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual whose e-mail address you want to add or edit and click **View/Edit**.
4. Click on the **Contact Information** tab.
5. Under **E-mail Addresses**, click **Add** or **Edit**.
6. In the Add/Edit E-mail Addresses window, enter or select the necessary options.
    - **E-mail Type** — In the drop-down list, select the type of e-mail address you are adding or editing. To edit this field's values in Define Lists, place your cursor on **E-mail Type** and click the hyperlink.
    - **Listed** — Select if the e-mail address you are adding or editing is listed.
    - **Unlisted** — Select if the e-mail address you are adding or editing is unlisted. By default, unlisted e-mail addresses do not print on reports.
    - **E-mail Address** — Enter the individual's e-mail address.
    - **Preferred E-mail Address** — Select if the e-mail address you or adding or editing is an individual's preferred e-mail address.
    - **Set as Access ACS Login E-mail** — Select if you want to set the e-mail address as the individual's Access ACS login.
7. When finished, click **OK**.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual whose social media address you want to add or edit and click **View/Edit.**
4. Click on 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 individual's social media address. Be sure to enter this in the form of a Web address, not the individual'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 **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual whose phone number, e-mail, or social media address you want to delete, then click **View/Edit**.
4. Click on the **Contact Information** tab.
5. Under **Phones**, **E-mail Addresses**, or **Social Media**, select the information you want to delete and click **Delete.**
6. When the confirmation message displays, click **Yes**.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select the person for whom you want to print a list of phone numbers and e-mail addresses, and click **View/Edit**.
4. Click on the **Contact Information** tab.
5. Click **Print** .
6. To print the report, click **Print.**

About Phone Numbers, E-Mail Addresses, and Social Media

Phone Numbers

Phone numbers are handled in two places in ACS: they can be associated with particular addresses (entered through the Addresses tab) or entered on their own (through the Contact Information tab). How you enter phone numbers affects how they print on reports, how they can be found, and what displays on the tabs in the person's record.

Phone numbers entered on the **Contact Information** tab:

- Are associated with individual records only, rather than family records. Thus, they display only on the individual record on the **Contact Information** tab.
- Are associated with a phone type created in Define Lists.
- Can be printed in directories, cards, lists and other reports offering options to print additional phone numbers. The resulting report shows the additional phone number for each individual who has that phone type.
- Can be exported and included in mail merges.
- Can be used for filters and searches.
- Can include an extension.

A good use of this might be to set up a phone type (in Define Lists) called "Cell Phone." Each member of the household might have a different cell phone number. In your ACS People Directory, by choosing to print the Cell Phone phone type, you will see the family phone number and the individual cell phone numbers.

Phone numbers entered on the **Addresses** tab:

- Can be associated with family or individual addresses. If associated with family addresses, they display on all records for the family.
- Are associated with an address type, created in Define Lists.
- Can be printed in directories and on certain lists offering options to print alternate addresses. The printout includes both the address and the phone number.
- Are not available for filters and searches unless the address is an active address for an individual.

A good use of this is for vacation addresses, college addresses, and so forth.

On the **Contact Information** tab, a **Y** or an **N** indicates if the number is listed or unlisted, respectively. Unlisted numbers can be printed on reports; however, the default setting on reports is to omit unlisted numbers. In addition, a Y under **Text Enabled** indicates that you can contact the individual via text messaging.

Area codes are optional in ACS. When area codes are used, there are often options to suppress selected area codes in directories, lists, cards, and other reports. You also can enter phone numbers with no punctuation, and ACS automatically formats the number. For example, you could enter 9876543 and ACS saves it as 987-6543. Enter 9876543210 and ACS saves it as 987-654-3210.

When you create new family records, the phone number you enter is saved with the home address type as a family address. This is the default phone number chosen for most reports with phone numbers, however, on the Listing of Safeguard Tasks and Name and Special Fields reports, you can print an individual's preferred phone.

There is no limit to the amount of phone numbers you can store in ACS.

E-mail Addresses

ACS can track an unlimited number of e-mail addresses for each individual. As with phone numbers and addresses, e-mail entries are assigned a type from Define Lists. An individual may use one type for both a phone number and an e-mail address. For example, Molly Manager may have a work phone number and a work e-mail address entered on the **Contact Information** tab. E-mail addresses can be up to 40 characters long.

If your computer has an e-mail program enabled, you can send an e-mail directly from ACS by clicking **Sen d E-mail** on the **Contact Information** tab. Your e-mail editor opens with the e-mail address already entered.

When adding e-mail addresses, you can select **Preferred E-mail Address** to denote the individual's preferred e-mail address. This is useful if the individual has several e-mail addresses, such as a work address and a home address. When sending e-mails such as contributions statements, ACS uses the preferred e-mail address. You can also set the individual's Access ACS Login.

You can also send e-mails to groups using the **Send E-Mail** option in searches. Help for e-mail is included in the Searches module.

Social Media

On the **Contact Information** tab, you can add, edit, or delete an individual's social media information. This lets you record an individual's profiles on social media sites such as Facebook and Twitter or an individual's blog or personal website address. Once you decide which information to record on this tab, you'll need to set up those types in Define Lists. For example, if many individuals in your organization use Facebook and Twitter, you could set up types for Facebook and Twitter in Define Lists.

When you add an individual's social media, a **Y** or an **N** indicates if the social media is listed or unlisted, respectively. By default, an unlisted social media address does not print on reports.

To view an individual's social media website, on the **Contact Information** tab, select an individual's social media information and click .

E-mailing an Individual from the Contact Information tab

On the Contact Information tab, you can send an e-mail to any of an individual's e-mail addresses.

For example, suppose James Aaron has two e-mail addresses, a home e-mail and a work e-mail. If James' home e-mail is his preferred e-mail address, you could e-mail him on the Profile tab. However, if you need to send an e-mail to James at work, you can do that on the Contact Information tab.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual who you want to e-mail and click **View/Edit.**
4. Click on the **Contact Information** tab.
5. Under **E-mail Addresses**, select the e-mail address you want to send a message to and click .

Searching on Social Media Information

In Searches, you can search based on an individual's social media link type, for a specific social media address, or whether a social media link is Listed or Unlisted.

For example, suppose many individuals in your congregation are on Facebook, and you want to perform a search to obtain a list of these individuals. However, you only want to find individuals who have listed accounts. In Searches, under **Social Media Links**, select **Listed**, and use the **Search Type** of **Equal To**. Then select Facebook as the **Link Type**, **Listed** as the **Value**, and click **OK**. When you process the search, all individual records with a Facebook profile address listed on the **Contact Information** tab display on the **Results** tab in Searches.

Or, suppose you have a social media user name that belongs to someone in your congregation, but you're not sure who it belongs to. In Searches, under **Social Media Links**, select **Social Media Address**. Then, under **Search Type**, select **Equal To**. In the **Value** field, enter the user name and click **OK**. When you process the search, a list of records displays on the **Results** tab.

1. Under Searches and Reports, click **Searches.**
2. On the **Search Criteria** tab, expand **Social Media Links**.
3. Double-click on **Social Media Address** or **Listed**.
4. Under **Search Type**, select the type of search you want to process.
5. Under **Search Values**, select the **Link Type** and enter the **Value** to search for, then click **OK.**
6. On the **Search Criteria** tab, click **Process**.
7. To see the search results, click on the **Results** tab.

Viewing or Adding an Individual's Access ACS Login E-mail

Some individuals may change their e-mail address in Access without your staff knowing. For example, suppose James Aaron used his work e-mail to log into Access ACS. After changing jobs, James changed his e-mail login in Access ACS, but did not let the church staff know. Since his previous e-mail address is in ACS, e-mails you send to that address are returned.

On the **Contact Information** tab, you can view the e-mail address an individual uses to log into Access ACS and add it to the individual's record, ensuring that you have an individual's most accurate contact information.

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

Working with Preferred Lists in ACS People

Adding an Individual to a Preferred List

Preferred Lists are user-defined lists in Contact Information. You can use Preferred Lists to set up e-mail, text message, or phone lists for your church or organization's groups or programs.

For example, you could set up a Preferred List called Children's Ministry in Define Lists. Next, you would add parents and grandparents who want to receive notifications when the children's ministry hosts events to the Children's Ministry preferred list. Then, when you host an event for children, you could search for individuals with a **Yes** value for the Children's Ministry Preferred List and call, e-mail, or text the individuals in that list to let them know about the event.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual who you want to add to a Preferred List and click **View/Edit**.
4. Click the **Contact Information** tab.
5. Click **Preferred Lists**.
6. Under **Preferred List**, select the list(s) that you want to add the individual to. If you want to create a new list or edit an existing one, click **Edit List**.
7. Click **OK**.

Mass Changing Preferred Lists

You can use Preferred Lists to set up e-mail, text message, or phone lists for your church or organization's groups or programs. If you have a large number of individuals to add to a preferred list, you can do this through Mass Change.

For example, suppose you want to start an e-mail list to notify senior citizens of programs in your church or organization. First, set up a Senior Citizens preferred list in Define Lists. You could then process a search for all individuals over the age of 55 who have an e-mail address as their Preferred Contact Method. You could then mass change the records that match your search results to a New Value of Yes, adding those individuals to your Preferred List.

You can also change an individual's preferred lists on the Contact Information tab.

1. If you have not already done so, make a backup.
2. If applicable, process any searches or filters needed for your Preferred List.
3. Under Manage Records, click the **Tasks** tab.
4. Select **People Mass Change** and click **Go** .
5. In the Mass Change window, under **Change Mode**, select **Change Field Value**.
6. Under **Available Fields**, select **Preferred Lists** and select the appropriate list.
7. Under **Include**, select the appropriate option according to which records you want to change.
8. In the drop-down lists, select the **Value to Change** (if changing all records that match a selection) and the **New Value**.
9. Click **Change**.

The Comments Tab - Adding and Printing Comments

Use the **Comments** tab to store information that is too long to enter in a drop-down list or field. You can enter any text in a comment, such as directions to someone's house, any special circumstances, etc. You can set up comment types in People Define Lists.

You can also select a **Comment Type** for each comment, or print a listing of family and individual comments for an individual on the **Comments** tab in View/Edit Individual. Your user name automatically displays in the comment field when adding a new comment.

Family Comments are those that apply to an entire family. For example, if you are entering directions to a family's home, you can enter it as a family comment. These comments display on the **Comments** tab of each family member record. **Individual Comments** are those that apply to an individual. For example, if you are entering information detailing a special circumstance of a child, you can enter it as an individual comment. These comments display on the **Comments** tab of the individual's record only.

Sorting Comments

The sort order for family or individual comments are saved by the user. If you make any changes to the sort order of comments that display on the Comments tab, close the ACS application and, then log in under the same user name. The sort order changes you made are retained when accessing the **Comments** tab.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to add a comment for and click **View/Edit**.
4. Click the **Comments** tab.
5. Click **Add** in the **Family Comments** or **Individual Comments** section of the tab, depending on the type of comment you want to add.
6. Enter all necessary information for the comment.
   - **Comment Date** — Select the appropriate comment date from the calendar or enter the date manually. **Comment Type** — Select the type of comment you are entering from this drop-down list. The values listed in the Comment Type drop-down list can be edited in Define Lists. When you place your cursor on the **Co mment Type** field name, it becomes a link to the Define Lists window. Entries can be up to 20 characters long. Examples of comment types include business, employer, and emergency.
   - **Comment** — Enter the comment in this field.
7. Click **OK**.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select the person you want to print a list of comments for and click **View/Edit**.
4. Click the **Comments** tab.
5. Click **Print**.
6. In the Print Preview window, click **Print** .

The Groups Tab - Adding Attendance and Activity Information

The **Groups** tab displays the activity groups and small groups in which the individual is participating, and allows you to add the person to new groups, edit the activity record or delete the activity item. Activities are set up in Define Lists from the People Main Menu. If you own the Attendance module, the **Groups** tab displays the classes in which the individual is enrolled.

When a new person joins your organization and signs up for an activity, or a current member decides to join an established activity group such as the Choir, you need to edit the individual activity record to enroll them in the group.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Add Individual to a Group** and click **Go**.
3. Select the individual you want to enter an individual activity record for, and click **View/Edit**.
4. Click on the **Activities** sub-tab, then click **Add**.
5. In the Master Group drop-down list, select the master group that includes the activity in which you want to enroll the individual.
6. In the left pane, select the category in which you are enrolling the individual.
7. In the **Element 1** drop-down list, assign an element item to the record.
8. If you have created element lists, enter any appropriate information under **General Fields**.
9. If you have created roster fields, enter any appropriate information under **Additional Fields**.
10. To add the individual to another category, select **Add Another**.
11. Click **OK**.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Add Individual to a Group** and click **Go**.
3. Select the individual you want to enter an individual activity record for and click **View/Edit**.
4. Click on the **Activities** sub-tab, then click **Quick Entry**.
5. In the **Master Group** drop-down list, select the master group that includes the activity in which you want to enroll the individual.
6. In the left pane, select the category you are enrolling the individual in.
7. In the **Element 1** list, assign an element item to the record.
8. If you have created other element lists, enter any additional elements.
9. If you have created roster fields, enter any appropriate information in the fields available in the lower right of the window.
10. Click **OK**, then **Close**.

Adding Attendance Information on the Classes sub-tab

The **Classes** sub-tab is enabled when you have the Attendance module. It displays the enrollments for this individual in all Sunday School or other Attendance classes.

You can quickly enroll someone in a class from this tab. That means when you are first entering a record, you can go ahead and enter them into a Sunday School class. Enrollment in a class requires that all class details (Div./Dept./Class and Position) have been set up in the Attendance module. For a complete description of these options, see the Attendance help.

For active records, the Classes tab also shows the Date Last Attended. To view markings for Attendance groups, click Inquiry. Attendance markings for all groups, including Worship and Activity Groups, display.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to add attendance information for and click **View/Edit**.
4. Click the **Groups** tab.
5. Click the **Classes** sub-tab.
6. Click **Quick Entry** or **Add** and enter all necessary information.
7. Click **OK**, then **Close**.

Printing from the Activities sub-tab

On the **Groups** tab, you can find the **Activities** sub tab. The **Activities** sub tab displays the activity groups in which the selected individual participates. On the **Activities** sub tab, you can add an individual to new groups, edit an activity record, or delete an activity item. Activities are set up in Define Lists from the People Main Menu and in Activities Setup.

Printing options are accessible by right-clicking the grid area on the **Activities** sub tab.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select an individual and click **View/Edit**.
4. Click the **Groups** tab.
5. On the **Activities** sub tab, right-click in the grid area and select **Print List**, **Print Detail**, **Print Label**, or **Print Grid**.

The Connections Tab - Adding Contact Information

If you have the Connections module, you can add contact information when an individual or family makes contact with your organization or when your organization makes contact with an individual or family. These contacts display on the Connections tab in View/Edit Individual. To add contact information, you must have security rights to Add/Edit Contacts in the Connections module.

For example, suppose your organization wants to personally call all first-time guests within 48 hours of their first visit. Once you add a first time guest's record in ACS, you can add an outward connection for that individual and assign it to a specific member (Caller) or Team to follow up with the guest. Once the first time guest has been contacted, you can mark the connection as Complete.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to add contact information for and click **View/Edit**.
4. Click on the **Connections** tab and select or enter the necessary information.
5. Under **Contacts**, click **Add** and enter all appropriate settings for the contact.
6. When finished, click **OK**.

The Pictures Tab - Remembering Who's Who

Pictures are a wonderful resource for remembering "who's who" in the organization. In ACS, you can associate a picture with a particular individual or family, or both. You can use the **Pictures** tab on the Add /Edit Pictures window to add or edit a picture of a family or individual.

You can print pictures directly from ACS or in directories and on Connections cards. To successfully print the Family Picture Report (12-up), Family Picture Report (20-up), Individual Picture Report (12-up), and the Individual Picture Report (20-up), pictures must be stored on Family and Individual profiles.

When importing pictures in ACS, a thumbnail copy of the original image is created. The thumbnail file is an exact copy of the picture imported, only smaller so it consumes less file space and is quicker to load. The default size for pictures is 1.25 inches wide by 1 inch high.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual for whom you want to add a picture and then click **View/Edit**.
4. Click the **Pictures** tab.
5. Under **Family** or **Individual**, click **Add**.
6. Click **Import** to import a picture from a CD or a file.
7. Select the picture file and click **Open**.
8. Click **Close**.

You can configure ACS to open your preferred image editing program when clicking the Edit option in Add /Edit pictures from a person's record. When you open the program through ACS, the changes you make to a picture will be reflected on the person's record. In order to view the changes, click **Refresh**.

Importing and Exporting Pictures in ACS People

You can import pictures for individuals in ACS from a number of sources. You may have a digital camera, have photos developed digitally, scan images, have them supplied by a pictorial directory firm, or some combination of these.

Pictures saved in ACS can be exported for use in another program. For example, if you import a picture from a digital camera, you can export that picture so it can be used in a Microsoft® PowerPoint® slide show of new members.

Tips for importing pictures

Before importing pictures, we recommend changing the file name of the picture to the first letter of the first name and all of the last name. This way, you know which picture belongs to which individual. It's also a good idea to give all pictures a unique file name after downloading them from your digital camera.

1. Under Managing Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select an individual's name and click **View/Edit**.
4. In the View/Edit Individual window, click the **Pictures** tab.

5. Under **Family** or **Individual**, click **Add** or **Edit**.
6. Click **Import**.
7. Navigate to the location of the picture. Note that files of the appropriate formats are automatically shown.
8. Select the desired picture file, and click **Open**. The picture is imported into ACS and displays.
9. Click **Close**.

The Label Names Tab - Setting up Individual and Family Labels

You can customize ACS Label Names to fit unique family situations, such as heads and spouses with different last names. For any label name or salutation, you can change the default setting. To change a label name, click in the text box corresponding to the label name to change, edit the label name accordingly, then select **Retain**. This ensures that the label name you have entered will not change if changes are made elsewhere in the record.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. In the Find Person window, select the individual whose label name you want to change and click **View/Edit**.
4. In the View/Edit Individual window, on the **Label Names** tab, enter the new label name under **Family Label Names** and **Individual Label Names**.
5. Select **Retain** to save your changes.
6. When finished, click **OK**.

The Staff Positions Tab - Assigning Affiliations

The Staff Positions tab displays if you own the Organizations module. It displays information about the organizations that an individual is associated with or has been associated with in the past. You can use this tab to associate an individual with an organization as their Primary Affiliation.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. Select the individual for whom you want to assign a Primary Affiliation and click **View/Edit.**
4. Click the **Staff Positions** tab.
5. In the **Primary Affiliation** field, click **Lookup**.
6. In the Find Organization window, select the organization you want as the individual's Primary Affiliation.
7. Click **OK**.

The Document Library Tab - Tracking an Individual's Files

The Document Library tab is a tool you can use to keep track of files associated with a particular individual. You can create a document library for each individual within your database. For example, you could use the Document Library to store an individual's background check documents, consent forms, an individual's resume, or reviews for an individual.

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.

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

Creating new documents for the Document Library

You can create a new Microsoft® Word document for an individual from the Document Library. You can then open and edit the document from the Document Library.

You can also create a new document using a Microsoft® Excel® Worksheet for an individual from the Document Library. You can then open and edit the document from the Document Library. These documents are saved in the acsdata directory.

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

The Departmental Fields Tab - Tracking Organization and Department Information

> ⚠ **ACS Multi-Site, Organizations, and Megachurch Client Program Feature**
>
> Departmental Fields are available for ACS Multi-Site or ACS Organizations clients, as well as clients enrolled in the Megachurch Client Program.
>
> If enrolled in the MegaChurch Client Program, contact your Account Manager or call 1-800-7367425 to have the Departmental Fields tab activated.

On the Departmental Fields tab, you can track customized fields for the departments within your church or organization. You can define the fields you want to track for the individuals in the department, using up to 22 data fields. The Departmental Fields tab works similarly to the Additional Fields tab in the way that you add new fields.

For example, if your church or organization has a disaster relief team, you could set up a page with the following departmental fields:

- The team members' disaster relief skills
- Years of experience
- Pay rate

This will add the new departmental fields to all individual records. You could then add the information for each member on the Departmental Fields tab on their individual records.

Security for Departmental Fields is controlled in Add/Edit Users. To see the Departmental Fields tab, you must have security access for Departmental Fields. Limiting access to Departmental Fields is helpful if you use them to track classified information, such as recovery programs within your church or organization.

Granting and Restricting Departmental Fields Access

If you store sensitive or classified information in Departmental Fields, such as recovery program information, you may want to limit your ACS users' access to some or all departments.

You can restrict an ACS user from viewing or editing departmental fields.

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go**.
3. Select a user in the grid and click **Edit.**
4. Click the **Security** tab.
5. Expand **People**.
6. To grant access to view departmental fields, right-click **View/Edit Department Fields** and select **View**. To grant access to view and edit departmental fields, select **All**. To prevent a user from editing or viewing departmental fields, select **None**.
7. To grant access to set up departmental fields, right-click **Setup Departmental Fields** and select **All**. To prevent a user from setting up departmental fields, select **None**.
8. Click **Apply**, then **OK**.

Setting up Departmental Fields

The first step of using Departmental Fields is setting up each department. You will then set up the fields that will display on all individual records. Seven field types are offered for customizing each department's fields.

Once the fields are set up, you can enter the departmental information for individuals.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. Select an individual's record and click **View/Edit**.
4. On the **Departmental Fields** tab, click **Setup**, then click **Add** to add a new department.
5. In the **Page Description** field, enter the department's name and click **OK**.
6. Each dotted line represents an available field. Click on one to set up a field.
7. Under **Field Information**, enter the name of the field in the **Label** and **Field Name** fields.
8. Under **Field Type**, select the field type.
9. Under **Field Display Settings**, select **Header** if you want to use the field as a header for other fields or select **Show Description as Bold** to bold the **Field Name.**
10. If your Field Type is a list, click **Add** under **List Items** to add items to the drop-down list. Enter a description and click **OK** to add the item to the list. Otherwise, go to the next step.
11. Click **OK**.

Entering an Individual's Departmental Fields

Once you've set up your departmental fields, you can enter the corresponding information on an individual's profile.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select the individual's record and click **View/Edit**.
4. Click on the **Departmental Fields** tab.
5. In the **Department** drop-down list, select the appropriate department.
6. Enter the individual's information in the fields set up for that department.
7. To enter information for the next department, click **Next Dept**.
8. When finished, click **OK** to save.

Mass Changing Departmental Fields

In the Mass Change window, you can edit data in the departmental fields. Mass change has two options: changing a field's value or moving the data from one field to another.

1. If you have not already done so, make a backup.
2. Under Manage Records, click the **Tasks** tab.
3. Select **People Mass Change** and click **Go** .
4. In the Mass Change window, under **Change Mode**, select **Change Field Value**.
5. Under **Available Fields**, select the field you want to change.
6. Under **Include**, select the appropriate option according to which records you want to change.
7. Under **Move To**, enter or select the **Value to Change** and/or the **New Value**.
8. Click **Change**.

About the Find Person Window

The Find Person window is one of the most important areas in People Suite, because you can use it to add, remove, or update information about the individuals in your church or organization. A number of tools and options are available on the Find Person window.

The center grid area displays the names in your database. You can highlight a name in the grid to select it. Additionally, you can enter a name, or a portion of a name, in the **Enter Last Name** field to locate an individual or family in the Find Person grid. You can modify the search and locate functionality of the **Enter Last Name** field based upon the Selection Mode options you select.

You can customize the Find Person grid to meet your needs. The **Grid** tab of the Customize window provides a Fields list for the additional columns of information selected to display along with each name in the Find Person grid. You can also specify how the list of names is sorted by selecting a **Sort List By** option on the **Options** tab. The **Sort List By** option that you select determines the default method of displaying names in the Find Person grid every time you log into ACS. Finally, note the Group by Family option in the Customize window. When this option is selected, families are listed together, regardless of differences in last names.

You can change the way records are located on the Find Person window by modifying your current **Selectio n Mode** options, located on the Options tab of the Customize window. You can also choose to display an individual's Primary Active address, including a company name and country, if this information has been entered for individuals. When a name is selected in the grid, you can right-click to view this information.

If you can't locate the name you are looking for in the database, or if you need to add a new name, click **Ad d New Family** to enter the first record. If you want to add an additional member to an existing family, select an individual family member, and then click **Add Family Member**.

When a name is selected, you can click **Copy To Clipboard** to copy contact information such as the email address without having to open the individual's record. You can also click **Print Profile** to print an individual profile summary of key data in the individual's record. To print an individual profile for each family member associated with the selected individual, click **Print Family Profile**. You can also click **Letter** to access the ACS Mail Merge feature. The **Show Results For** options on the Find Person window provide a way to select a subset of names to display in the Find Person grid, based on a filter or a search. You can choose to filter the Find Person window by selecting the **Filter** option.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual whose record you want to work with and click **View/Edit**.

> **Tip**
>
> You can view an individual's complete Primary Active address, including a company name and country if you have entered these items, by selecting an individual and right-clicking the Find Person grid.

Customizing the Find Person Window

You customize the Find Person window to display selected fields next to an individual's name in the grid. The selections you make are stored by user name and do not affect other ACS users' settings. For example, you can customize the Find Person window to search by envelope number by using the **Search** selection mode and selecting **Include Envelope Number**.

You can also customize how to search for and locate individuals in the Find Person window.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Right-click the Find Person grid, then select **Customize**.
4. On the **Grid** and **Options** tabs, select the appropriate options, then click **OK**.

Additional Field Information

The Grid Tab

You can use the **Grid** tab to select specific display settings for the Find Person grid by choosing the settings that you want. You can also select the fields that you want to display next to an individual's name in the Find Person grid.

Settings

- **Auto Size Column Width** — Select this option to automatically resize the columns to the maximum width of the Find Person grid.
- **Show Grid Lines** — Select this option to display grid lines between records in the Find Person grid.

Fields
Select the additional fields to display in the grid area of the Find Person window from this list. To select a field from the list, double-click the field. You can select unlimited additional fields to display in the grid area of the Find Person window. You can also sort the order of the selected fields in the list using **Move Up** and **Move Down**. Some fields, such as the **Display Name** field, are required. An automatically selected check box displays next to all required fields.

The Options Tab

You can use the **Options** tab to choose how to search for and locate individuals, sort records, and choose the information you want to display in the Find Person grid.

Selection Mode

- **Locate** — Select to locate names in the Find Person window by scrolling to the letters of the last name as you enter them in the selection field (the field displays as **Enter Last Name** when this option is selected).
- **Search** — Select to narrow down the list of individuals based on your search criteria.

Include Address/Phone
Select to include the address and phone number as search fields. When you choose this option, selection boxes labeled **Address** and **Phone** display in the Find Person window. You can enter as many numbers and/or letters as needed for the address or phone number. If you search by address, and the matching record has family members associated with it, the records for all family members display. This option is only available when you select **Search** as the **Selection Mode**

Include Envelope Number
Select to include the envelope number as a search field. When you select this option, a selection box labeled **Env. #** displays in the Find Person window. You can enter an envelope number and the matching record displays. This option is only available when you select **Search** as the **Selection Mode**

Use Search for Prior/Next
Select to cycle through the results returned in a search, filter, or according to what you enter in the **Enter Last, First Name** field. You can cycle through records by clicking **Prior** and **Next**, while viewing a record in the View/Edit Individual window. To view records not included in the search, clear this option.

Sort List By
The **Sort List By** options you select determine how names are sorted each time you log into ACS.

- **Last Name** — Select to sort the list of individuals alphabetically in the Find Person window by last name.
- **First Name** — Select to sort the list of individuals alphabetically in the Find Person window by first name.
- **Group by Family** — Select to group all members of the same family together, even if they have different last names. The overall sort order is by last name.

Settings

- **Show Address** — Select to display the highlighted individual's address in the area below the Find Person grid. When choosing fields to display on the Grid tab, remember that while the Address field is an available option, the address can also be viewed in the Find Person window by right-clicking on a highlighted name.
- **Show Sort/Filter Options** — Select to display the Sort List By and Show Results For options below the Find Person grid.
- **Shift to Edit mode after add** — Select to automatically access the Add/Edit Individual window after entering a new individual. This saves valuable time if you want to enter additional information immediately after adding a new individual. If cleared, ACS returns to the Find Person window.

Using the Locate and Search Options in Find Person

In the Find Person window, you can use the **Locate** or **Search** option to find the individual or family records you need.

Locating Individuals

The **Locate** option locates names on the Find Person window by scrolling to the letters entered in the **Enter Last Name** field.

For example, if you want to quickly locate the record for Michele Gainey, begin entering her last name in the selection field. When you type the letter G, the selection arrow moves to the first individual in the list whose last name begins with the letter G. As you add the A, the selection arrow moves again to the first individual in the list whose last name begins with the letters G-A, and again with the I, and so forth.

If you see that the selection arrow displays next to the individual you want, you can stop typing and press Enter, or click **View/Edit** to open the record.

Searching for Individuals

You can use the **Search** option to search for and locate individuals in the Find Person window by narrowing down the list of individuals based upon criteria you enter. With this option, the selection box is labeled **Enter Last, First Name**. You can enter as many letters as you need for the last name, a comma, and as many letters as you need for the first name. All matching records display.

For example, if you enter "wil, m," all individuals whose last names begin with the letters "wil" and whose first names begin with "m" display. Your results may include Michele Williams and Mark Wilkins. Once your results display, you can select the individual and press Enter to access their records.

Or, you can use search mode to search for an individual based on their address or phone number. When customizing the selection mode options, select **Include Address/Phone**. You could also use it to search for a child with a different last name than his or her parents.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. Right-click inside the Find Person grid, then select **Customize**.
4. Click on the **Options** tab.
5. Under **Selection Mode**, select **Locate**.
6. Select any other customization options as necessary, and then click OK.
7. In the Find Person window, begin typing the letters of the last name of the individual you are trying to locate into the **Enter Last Name** field. The list automatically scrolls to the first individual whose last name starts with the letters you type.

Tip

If you set the **Selection Mode** to **Locate** and **Sort List By** to **Family**, the navigation arrows display. Use the arrows to search all individuals with that last name.

The navigation arrows let you search for an individual whose last name differs from the head of family.

8. Press Enter to select the name. You can also use the up and down arrows to move to the specific individual.
9. Click **View/Edit** to open the selected individual's record.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. Right-click inside the Find Person grid, then select **Customize**.
4. Click on the **Options** tab.
5. Under **Selection Mode**, select **Search**.
6. Select other customization options as necessary, and then click **OK**.
7. In the Find Person window, type some letters of the last name of the individual you are searching for into the **Enter Last, First Name** field. You can also use a comma and type some letters of the first name. For example, enter the letters "gai,m" (without quotes) to search for Michele Gainey.
8. Press Enter. The list automatically narrows to display only those individuals whose last names begin with the letters you have typed.
9. Select the individual whose profile you want to view, then click **View/Edit** to open the record.

Working with Filters in ACS People

Filters are used to create a subset of your database to work with. You can access filters in the Find Person window, and you can also use them in Reports. For example, if you want a list for a teen activity, you can create a filter to show only the children ages 13-17. You can use this Filter as you work with People records, so your Find Person window displays only those names. You can also use this Filter when you print Reports.

You can also save a filter and use it again without having to recreate the specifications each time. For example, you may have a Saved Filter called Birthday List - October. Each time you load the filter and apply it, you can view a list of people with October birthdays. By checking the box to "Include with report" when the filter is set up, you can print a quick list of the names and birthdays for those matching individuals.

Filters vs. Searches

Although similar, the key differences between Filters and Searches are:

- Filters are limited to People data and Sunday School Attendance enrollment. In Searches, you may combine data from all ACS People Suite modules.
- Filter criteria are combined as "and" statements. Searches may be "or" statements. For example, to find everyone who lives on Elm Street or Ash Street, you need two filters. However, you could combine these in one search.

Creating Filters in People

You can use Filters to limit the records printed on a report to those with specified values for selected fields. The filter determines which member records print on the selected report. After you create a filter, you can sa ve it or print the filter's results. You can also edit the filter if necessary.

You can access the Filter option in the Find Person window or by selecting Filter on an ACS Reports Setup tab.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, click **Filter**.
4. In the **Filter Description** field, enter a description.
5. **Optional:** In the **Filter Date** calendar, select the desired date for the filter. This option affects age related filters. For example, if it's July and you want to know everyone who will be 18 or older as of September 1, set the filter date as 9/1. Then, when you select Date of Birth - Age as 18, your filter only returns individuals who will be 18 or older as of September 1.
6. In the **Available Fields** list, select the field you want to filter by. If you see a box with a plus sign, that means there are more options not displayed. Click the plus sign to see all the options. Select the filter field of your choice. Search criteria and results are limited to records and areas to which the user has been granted access to in Add/Edit Users.
7. Click **Add**.
8. Select the appropriate filter options and **Filter Type** for your selection. Options vary depending on the filter field you selected.
9. Click **OK**.
10. Repeat steps 6 through 9 if additional filter fields are required.
11. When you are ready to apply the filter to your People records, click **Apply**.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, click **Filter**.
4. In the Edit Filters window, select the filter field you want to edit from the **Filters** list.
5. Click **Edit**.
6. Make the appropriate changes to the filter field options and click **OK**.

Editing Filter Results in People

After applying a filter, you may want to remove or add specific individuals from the filter results.

For example, you want a list of members who live on Main Street. You create the filter and apply it. As you review the list, you see Mr. Smith's name. You know Mr. Smith is out of town and you want to remove his name from the list. You can edit the filter results to remove his name. You can also edit results to add names, thereby creating a list of just the names you want.

1. In the Find Person window, under Show Results for, click **Edit** beside the **Filter** option. Remember that you must have already created and applied a filter.
2. Use the arrows to edit the filter results.

3. To return to the Find Person window, click **Close**.

Saving Filters in People

You can save the filters you create so you can use them again later. For example, if you create a filter for October Birthdays, you can save it so that it can be used again next year.

Saved filters can be **Private** (for your use only) or **Public** (for use by all ACS users in your organization). W hen you need to use the filter again, you can load the saved filter.

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. To share this filter with other ACS users, select **Public**.
5. Click **Save**, then **Close**.

Loading Saved Filters in Find Person

If you have saved filters, you can load them instead of having to set up new filters each time they are needed.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Click **Filter**.
4. Under **Available Fields**, click **Load**.
5. Under **Saved Filters**, select the filter you want to use and click **Load**.
6. To apply the selected filter to your People records, click **Apply**.

Viewing and Printing Filter Results

Once you have set up a filter in the Edit Filters window, you can view and print the filter results before applying the filter to your People records.

1. Create the filter you want to use.
2. Click **View Results**.
3. Select the **Sort order** and **Name** format you want to use for the Filtered List display.
4. To access the Print Preview window, click **Print.**
5. To print the filter results, click **Print** .
6. Click **Close**.
7. **Optional:** To apply the filter to your People records, click **Apply Filter**.
8. Click **Close**.

Deleting and Deactivating People Records

You may want to delete individual records from your ACS database. While ACS provides options for deactivating an individual while keeping the name in your database, your files may be cluttered unless you delete records.

Deactivating an Individual's Record

You can deactivate an individual using one of two methods:

- The **Inactive** option on the View/Edit Individual window
- The **Active Contributor** option in the **Contribution Information** section on the **Profile** tab of the View /Edit Individual window.

Here's some information about each option.

The Inactive Option

Selecting **Inactive** in the View/Edit Individual window deactivates the selected individual without removing him or her from the ACS database. For example, you can deactivate individuals who have passed away. Inactive records display on the Find Person window with a **D** to the left of the name as a reminder that the record is deactivated. For example, you may want to deactivate deceased members.

Many organizations compile annual reports that include inactive members. Deactivating rather than deleting an individual keeps the name in the system for use in such reports. If an additional field is set up to show "Exit Date" or "Date Deactivated," you can then find those individuals deactivated during a specific time period.

When you deactivate a Head or Spouse record, you must update the defaults for the **Formal** and **Informal Label Names** to remove the deactivated individual's name.

What happens when I deactivate individuals?

- Inactive individuals are included in filter results and print on lists of filter results.
- Inactive individuals continue to display in activity groups. If you print a list of the activity group members, an asterisk displays beside names of inactive individuals.
- Inactive individuals do not display in Searches, unless you specifically search for them.
- By default, deactivated individuals are not included on reports. To include inactive individuals on reports, select the **Include Deactivated People** report option.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .

3. In the Find Person window, select the individual you want to deactivate and click **View/Edit**.
4. Under **Name Information**, select **Inactive**, then click **OK**.

The Active Contributor Option

The **Active Contributor** option is automatically selected when you enter a contribution for an individual. You can clear it if a contributor is no longer active. In the case of when a contributor moves out of town or dies, you cannot delete the record if it contains gifts for the current year. If you clear **Active Contributor**, the contributor is not included in statement printings, extracts, and lists unless the option to include deactivated contributors is selected.

You can print a list of deactivated individuals and deactivated contributors in ACS Reports.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to deactivate and click **View/Edit**.
4. In the View/Edit Individual window, click on the **Profile** tab.
5. Under **Contribution Information**, clear **Active Contributor**, then click **OK**.

Deleting an Individual or Family Record

You can delete individuals using the **Delete Individual** option. However, you cannot delete an individual if he or she has gifts or transactions entered for the current year or the previous year.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Delete Individual** and click **Go** .
3. In the Delete Individuals/Organizations window, click **Find Person**.
4. Select the individual you want to delete and click **OK**.
5. Click **Delete Selected**.
6. When the confirmation message displays, click **Yes**.
7. In the **Reason for Deleting** dialog box, enter the reason you are deleting the individual and click **OK**.
8. **Optional:** If you are deleting a head of household record for a household with more than one member, a message displays asking if you want to select a new head of household for the family. Select the appropriate option and make any necessary selections.
9. When the confirmation message displays indicating that the record has been deleted, click **OK**, then **Close**.

You can also delete a family's record, provided no family member has gifts or transactions entered for the current year or the previous year.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Delete Individual** and click **Go** .
3. In the Delete Individuals/Organizations window, click **Find Person**.
4. Select a member of the family you want to delete and click **OK**.

5. Click **Delete Family**.
6. When the confirmation message displays, click **Yes**.
7. In the **Reason for Deleting** dialog box, enter the reason you are deleting the family and click **OK**.
8. When the confirmation message displays indicating that the family has been deleted, click **OK**, then **Close**.

You can also print a list of deleted records or clear the deleted records list.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Delete Individual** and click **Go** .
3. In the Delete Individual/Family window, click **Print**.
4. When the report displays, click **Print** .

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Delete Individual** and click **Go** .
3. In the Delete Individual/Family window, click **Clear**.
4. When the confirmation message displays, click **Yes**.

Mass Deleting Individual Records

In ACS People, you can mass delete individuals from your database, based on search or filter results.

When should I mass delete records?

Mass deleting individuals is helpful after a data cleanup. For example, suppose a team of administrators at your church reviews member lists and finds many duplicate records or records for people who haven't attended in many years and never contributed. You can mass delete these records to purge them from your database.

You cannot delete individuals who have contributions gifts in the current year or the previous year, or individuals with a combined contribution record type whose spouse is not included in the search or filter results being deleted. If these records are included in your search or filter results, ACS prompts you to deactivate the records or keep them active.

What happens when I delete records?

When you delete an individual from your database, the individual's record is permanently removed, so be sure you won't need this information in the future. You can print the individual's profile before deleting him or her so that you have a hard copy of the information.

If you may need the individual's information in the future, but do not want to display the individual in search results or reports, consider deactivating the record instead. Also, if you entered a duplicate record in error or need to delete only a few records, you can delete an individual's record.

Caution

We strongly recommend making a backup before deleting individuals. This is the only way to ensure you can correct an error if one occurs. In addition, you may want to restrict access to this feature to only administrators in your church or organization's office who understand the implications of deleting records.

1. Perform a search or create a filter to find the individual records you want to mass delete.
2. Under Manage Records, click the **People** tab.
3. In the drop-down list, select **Delete Individual** and click **Go** .
4. In the Delete Individuals/Organizations window, click **Mass Delete**.
5. In the Mass Delete window, select whether to **Delete based on Search Results** or **Delete based on Filter Results**. If you delete based on search results, click **Edit Search Results** to exclude individuals from the mass delete.
6. Enter a **Reason to Mass Delete**, then click **Continue**.
7. If your results include records that cannot be deleted, these records display in the grid. To deactivate these records, select **Deactivate All** and click **Continue**. To leave the records as **Active** in your database, click **Continue**.
8. A list of records being deleted displays. To print People Profiles for the individuals being deleted, click **Print Profile for listed Individuals**. Otherwise, click **Continue**.
9. When the confirmation message displays, click **Yes**.

Changing Family Units in ACS People

ACS includes a feature to help you move an individual from one family unit to another, or start a new family with an individual who is already a member of a family. You can also change an individual's family position.

When should I use Change Family Unit?

Here's an example of when you can change family units:

Suppose Tom, a recent college graduate, moves out of his parent's house into his own apartment. Tom needs to have a new family record set up with him as the head. Tom already has a record in ACS and is a member of his parents' family, so you would find Tom's record in Change Family Unit, then start a new family for him

Several months later, Tom marries Lindsay. If Lindsay is new to the organization, her information may be added directly to Tom's family record from Find Person. If Lindsay already has her own record in ACS, it needs to be combined with Tom's by moving her record from her family's to Tom's.

Consider Family Position

In Change Family Unit, consider family position. You cannot move a Head into another family that already has a Head.

For example, if Glenn Aikers, a single man established as Head, marries Annie Abraham, a divorced mother set up as a **Head**, it is easier to move Annie Abraham into Glenn Aikers' record and change her family position to **Spouse**. However, if they moved into Annie's household, you may prefer to move Glenn Aikers into Annie Abraham's record so the addresses don't have to be changed.

What information changes when I move an individual from one family to another?

When you move an individual from one family to another, you move all data from their individual record. Here's how ACS manages data when you move an individual:

- **Records** — All records for the individual are moved with the individual.
- **Name & Title** — When you move an individual, you are asked if you want to change the last name or title.
- **Family Comments** — When you move an individual from a family that has family comments, you are asked if you want to move the comments to the new family record.
- **Contributions** — When you move an individual with a Combined Contributions Record type, you are asked if you want to move all contributions, gifts, and pledges to the new family record.
- **Addresses** — If the individual you are moving is the only member of a family, you are asked if you want to delete the family addresses for that family. If you say no, each of those family addresses is changed to individual addresses for the person being moved. You must then select a new address type for each of these addresses. If there are not enough address types available, the system assigns the remaining addresses a temporary address type. You can add additional address types later and change those addresses to the new address types.
- **Head of Household** — If the person you are moving is the head of household of his or her current family, you do not have to select a new head of household for that family.
- **Contribution Records** — If you move a head of household who has a Combined Contributions Record, the Contributions information moves with the head of household.

Changing an Individual's Family Position

Sometimes an individual is given an incorrect family position, or their family position changes.

For example, suppose Tom and Lindsay, both of whom have records in ACS, marry and move into Lindsay's household. Since the two will share Lindsay's address, you move Tom, a male, into Lindsay's household. Lindsay is currently the **Head** record, so you set Tom as the **Spouse** record during the move.

However, to make your database more consistent, you decide to change Tom to the **Head** record because you want males to be the heads of households. Since a household cannot have two Head or two Spouse records, you would first change Lindsay's family position to **Other**, then change Tom's position to **Head**, then change Lindsay's position to **Spouse**.

1. Under Manage Records, click the **Tasks** tab.
2. In the drop-down list, select **Change Family Unit**, then click **Go** .
3. Under **Move From**, click **Find Person**.
4. Select the individual whose family position you want to change and click **OK**.
5. Click **Change Position**.
6. When the confirmation message displays, click **Yes**.
7. Select the family position for the individual and click **OK**.
8. When the confirmation message displays, click **Yes**.
9. Click **Close**.

Changing an Individual's Family Unit

In Change Family Unit, you can move an individual from one family to another. This is helpful when two individuals who both have records in ACS marry and move into the same household.

1. Under Manage Records, click the **Tasks** tab.
2. In the drop-down list, select **Change Family Unit** and click **Go** .
3. Under **Move From**, click **Find Person**. Select the individual you want to move to another family unit and click **OK**.
4. Under **Move To**, click **Find Person**. Select the family unit you want to move the individual to and click **OK**.
5. Click **Move** or drag and drop the individual into the **Move To** section.
6. When the confirmation message displays confirming that you want to move the individual to the selected family, click **Yes**.
7. A message displays asking if you want to copy the individual's family comments to the selected family. Make the appropriate selection.
8. Select the correct family position and click **OK**.
9. When prompted, select whether you want to change the individual's last name and title.
10. **Optional:** If the individual you are moving has a Combined Contributions Record, a message displays asking if you want to move all contributions, gifts, and pledges to the new family. Make the appropriate selection.
11. **Optional:** If the individual you are moving is the Head of Household in his or her original family, a message displays asking if you want to select a new head of household. Make the appropriate selection and changes.
12. When finished, click **Close**.

Starting a New Family with an Existing Individual Record

You can start a new family with an existing individual's record from Change Family Unit. You could use this when adult children move out of their parents' households or when a family divorces. This lets you change the individual's home address and other information.

When you start a new family with an existing individual, you move all of their records with them. You cannot start a new family with an individual if he or she is the only person in their existing family unit.

1. Under Manage Records, click the **Tasks** tab.
2. In the drop-down lists, select **Change Family Unit** and click **Go** .
3. In the **Move From** section, click **Find Person**. Select the individual you want to start a new family with and click **OK**.
4. In the Change Family Unit window, click **Start New**.
5. When the confirmation message displays, click **Yes**.
6. Answer any other messages that display, and then click **Close**.

Mass Changing Records in ACS People Suite

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.

Changing Field Values with Mass Change

In Mass Change, you can replace the data in a selected field with new information. You can change records based on search results, filter results, or a selection. To learn more, see the examples in the Additional Field Information.

1. Select your data prior to entering Mass Change. This means processing a search or applying a filter to find the records you want to change. If you are replacing particular values, or changing all records, this step won't be necessary.
2. **Optional:** Set up new values in Define Lists, if needed. You cannot enter new values while in Mass Change.
3. Under Manage Records, click the **Tasks** tab.
4. In the drop-down list, select **People Mass Change** or **Organizations Mass Change**, then click **Go** .
5. Under **Change Mode**, select **Change Field Value**.
6. Under **Available Fields**, select the field you want to change.
7. Under **Include**, select which records to include in the change. To learn about each option, see the Additional Field Descriptions below.
8. **Optional:** If you select **Change Records that Match selection below**, in the **Value to Change** field, select or enter the field value you want to change.
9. In the **New Value** field, select or enter the new field value for the selected field, then click **Change**.
10. When the confirmation message displays, click **Yes**.
11. Click **OK**, then **Close**.

Additional Field Information

Change Records that Match Search Results
All records from your most recent search will be changed to include the new information. Old values or empty cells will be replaced with the new data.

For example, suppose you have created an additional field to assist the Stewardship Team with the Building Fund campaign. Each week, the fields are updated to indicate the giver status. Each week, you run a search to determine who meets "Leadership Giving" (such as a pledge of $5,000 or more to the Building Fund). You then Mass Change the additional list field to enter "Leadership" into those records.

Change Records that Match Filter Results
All records from your filter will be changed to include the new information.

For example, suppose you created a filter to show all records where Gender was left blank. You manually edited the filter results so you were sure you had only males on the list. You then did a mass change to enter Male into the Gender Field for records that match filter results. Then you filter again for all records with blank gender fields. These are the Females, so you do another Mass Change to enter Female into all those records.

Change Records that Match selection below
This option replaces one selection with another.

For example, suppose you have an additional category for employer. The local bank, formerly named First Trust, is now called Reliance Bank. You mass change with the option to Change Records that Match Selection Below, replacing "First Trust" with "Reliance Bank". You could also use this option to mass change individuals with a phone type of Work to a phone type of Business.

Change All Records
All records, regardless of whether any data is currently in the selected field, will be changed to include the new information.

Moving Field Values with Mass Change

In Mass Change, you can move your data from one field to another location. However, you should set up the **Category Description** in Define Lists before moving data.

There are some limits when moving fields.

- If your data is currently in a **drop-down list**, you can move it to another drop-down list or a non-list field. You cannot move it to a date field.
- If your data is currently in a **non-list field**, you cannot move it to a list, but you can move it to a non-list field. You can move it to a date field; however, only valid dates move. Invalid dates remain in the original field, and the original field name is appended with the prefix Old. You can then search the old field for "Not Blank" to find the invalid dates and manually move the date. When you are done, you can deactivate the old field to remove the invalid dates.
- If your data is currently in a **date field**, you cannot move it to a list. You can move it to a non-list field or another date field.

1. Under Manage Records, click the **Tasks** tab.
2. In the drop-down list, select **People Mass Change** or **Organizations Mass Change** and click **Go** .
3. Under **Change Mode**, select **Move Field**.
4. Under **Available Fields**, select the field you want to move.
5. Under **Move To**, select the field in which you want to move the information.
6. Review your choices, then click **Move**.
7. When the confirmation message displays, click **Yes**.
8. To exit Mass Change, click **Close**.

Activities

The Activities tools in ACS are a great help for tracking groups, events, and participation opportunities within your organization. ACS provides tremendous flexibility in setting up activity groups. Groups can be sub-categorized to create levels of detail. In addition, comments can be attached to an event and detail fields can be created so that information can be gathered about the enrolled individuals or the events.

In addition to elements, there are options for comments, dates and numbers. ACS demo data shows how activities can be used. There are also numerous examples.

When you have Activities set up, the activity information you enter will be available for obtaining phone lists, mailing labels, membership rosters, merge letters, and more for the activity participants. Because of the groups/roster design, you can quickly pull information on multiple levels. For example, you can:

- Pull a list of anyone on a committee, a list of individuals on a specific committee, or a quick list of all committee treasurers when budget season rolls around.
- Find past members when it's time to look for proven skills.
- Filter and Search tools are both available for Activity records.

Activities can also provide a historical record of who has served in different capacities for your organization. Imagine Member Smith's pleasure when you recognize their service through the years, not overlooking activities from several years ago because you've kept the records. How much history you keep is up to you. ACS does not limit the detail you can keep.

There are three main Activities options. Each option contains information about individuals and allows you to perform specific functions. The different Activities options are:

- **Activities by Individual** — Let you enter and display participation records for a single individual. This is where you can see what Robert Smith is involved in and enroll him in additional activities. Activities by Individual can also be accessed from the individual's main record in Add/Edit Individuals.
- **View/Edit Groups** — Let you change the participation records of entire groups of people at one time or delete individuals from an activity. For example, this is where you can copy all the members of the Computer Committee to the new Technology Committee, then adjust the names if needed.
- **Activities Setup** — Let you set up, edit, and delete activities.

Activity Categories and Their Elements

Activity categories are the events that individuals in your organization can participate in or groups to which they can belong. Examples of activities are Youth Leadership Camp, Wednesday Night Bible Study, Morning Breakfast and Reflection, and Sunday's Car Wash for Flood Relief.

Elements are subcategories within an activity category. When you enroll someone in an activity and you have set up elements, you can choose from the Element lists to further define their participation. For each activity, you must create at least one Element 1.

If you decide to add elements to your activities, you must first activate them on the **Lists** tab in the Group - Activities window. The elements display as drop-down lists when you sign someone up for an activity through the Edit Roster Entry window - General Fields section.

Creating Activity Categories

In ACS, you can create activity categories and elements. For each activity category, you must create at least one Element 1.

When you open the People Suite for the first time, you will likely find that there are already three default activity categories set up: Family Care Ministry, Committees, and Music Ministry. You can edit or delete these activity categories as necessary. They are intended to provide you with an example of how you might set up your own activity categories. You must first create an activity category before you can add elements to an activity.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select the group type.
4. In the **Master Groups** drop-down list, select the master group to which you want to add an activity category.
5. Click **Add** and select **Add Category**.
6. In the **Group Name** field, enter a name for the roster group or activity category. Names can be up to 30 characters and spaces long.
7. **Optional**: Click the **Settings** tab.
    - On the **General** sub-tab, enter a comment if you selected **Use Comments** on the **Settings** tab in Master Settings when you created the master group.
    - On the **Roster** sub-tab, add a quick code and location of where the activity is to take place.
    - On the **Attributes** sub-tab, enter an age range for the roster.

8. On the **Lists** tab, under **Lists**, select an **Element** and click **Add**.
9. In the **Enter Element** field, enter an element name. To add more selections for this element, select **Add Another**.
10. Click **OK**.
11. Repeat steps 8-10 for the additional elements.
12. **Optional**: On the **Roster Fields** tab, select to use any additional roster fields to associate an individual with an activity.
13. **Optional**: To add another category, select the **Add Another** option.
14. Click **OK**.

Additional Field Information

On the **Settings** tab in the Edit Group window, you can enter and view comments about activity groups on the General sub-tab, enter roster information on the **Roster** sub-tab, and select roster age ranges on the **Attributes** sub-tab.

General

If you selected **Use Comments on the Settings tab in Master Settings**, the activity group's comments will display on the General sub-tab. The **Comments** field displays for both master groups and categories, and you can add, edit, or delete comments on the sub-tab.

Roster

On the **Roster** sub-tab, you can enter roster information to help you quickly reference your activity. If **Use Location** was selected when setting up your group, you can also enter the group's location.

- **Quick Code** — Enter a quick code to quickly identify this activity from other activities. Your quick code could be the first few letters of the activity's name. If you have already entered a quick code when setting up your group, it will display in this field.
- **Locations** — This grid displays the group's location(s). To add a location, click Add and enter the location in the Location Description field.

Attributes

On the **Attributes** tab, you can include an age range for your group's roster. When this feature is used along with Checkpoint, you can assign children to classes or groups according to their date of birth when they are checked in.

- **Include Age Range for Roster** — Select to define the group's age range. You will also need to enter the age range in the Years fields. If you want to be able to assign a person to a class based on a person's date of birth in Checkpoint, you must enter this information for each of those classes.
- **Enter Months** — Select to define the group's age range in months rather than years. This can be helpful when very young children or babies are being checked in, especially if you have different nurseries or classes based on the baby's age range.

The values you can use in the month fields are "0" through "11". When a child turns five, they are 5 years and 0 months old for the first month. At the beginning of the second month, they are 5 years and 1 month old until the beginning of the third month, at which point they turn 5 years and 2 months old. At the beginning of the twelfth month they are 5 years and 11 months old. They turn 6 on the beginning of the next month, at which point they are 6 years and 0 months old.

Here are some examples:

- The range 5 years to 5 years includes anyone 5 years and older but less than 6 years old.
- The range 5 years to 6 years includes all 5 year olds and 6 year olds.
- The range 5 years, 0 months to 5 years, 0 months includes anyone 5 and older but less than 5 years, 1 month old.
- The range 0 years, 0 months to 0 years, 6 months includes anyone from birth to 6 months old.
- The range 0 years, 2 months to 2 years, 6 months includes anyone 2 months and older but less than 2 years, 7 months old.
- The range 5 years 3 months to 5 years 6 months includes anyone 5 years 3 months and older but less than 5 years, 7 months old.

If **Enter Months** is not selected, the age range defaults to years.

To make a group or level inactive, select the **Inactive** option. If you make an intermediate level inactive, any group levels within it are made inactive.

Roster Fields

When adding a category to a master group, the **Roster Fields** tab displays in the Edit Group window. On the **Roster Fields** tab, you have the following options:

- **Use Alpha Field 1, 2** — Select to create a text field on the **Activity Fields** tab of the New Roster window. Enter a title for the Alpha Field. The title can be up to thirty alphabetical or numerical characters long. Your title should be descriptive and relevant to the field. For example, enter Counselor Comment to describe a field where a counselor can enter a comment on the individual's participation with the activity.
- **Use Date Fields** — Select to create a date field on the **Activity Fields** tab of the New Roster window. Enter a title for the Date field. The title can be up thirty alphabetical or numerical characters long.
- **Use Number Field** — Select to create a number field on the **Activity Fields** tab of the New Roster window. Enter a title for the Number field. The title can be up to thirty alphabetical or numerical characters long.

Use Currency Field — Select to create a field where you can enter money amounts on the **Activity Fields** tab of the New Roster window. Enter a title for the **Currency** field. The title can be up to thirty alphabetical or numerical characters long.

Deleting Activity Categories

When you delete a category, you also delete the elements along with any individual activity records associated with this group.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select the group type.
4. In the **Master Groups** drop-down list, select the master group the activity is in.
5. In the grid, select the **Category** you want to delete, then click **Delete**.
6. When the confirmation message displays, click **Yes**.

Deleting Activity Element List Items

If you have an activity element list item that you no longer use, you can delete it. You can also delete elements in **Add/Edit Lists** in the Group Setup window.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select the group type.
4. In the **Master Groups** drop-down list, select the master group the category is in.
5. In the grid, select the category that has the activity whose element list item you want to delete.
6. Click **Edit**.
7. Select the appropriate element, then select the list item you want to delete.
8. Click **Delete**.
9. When the confirmation message displays, click **Yes**.

Editing Activity Categories

Editing Activity Categories is handy when you discover a word spelled wrong and you want to correct it. Or perhaps one activity was set up spelled in all capital letters and others are in proper case, and you want them to be consistent. When you edit activity categories, all records containing that entry will be updated to contain the new edited value. If this is a network version, you must have everyone exit the Activity Program before you make the change.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select **Activity**.
4. In the **Master Groups** drop-down list, select the master group.
5. In the grid, select the category you want to edit, then click **Edit**.
6. Make any necessary changes on the **Settings**, **Lists**, or **Roster Fields** tabs.
7. Click **OK**.

Editing Activity Element List Items

Editing activity element list items is handy when you discover an error (misspelled words, inconsistent capitalization) or when a definition is revised (changing Softball to Fast Pitch Softball, VBS to Vacation Bible School, or Member to Participant).

When you edit an activity element list items, all records containing that entry update to contain the new edited value.

You can also edit elements through Add/Edit Lists in The Groups Setup Menu.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select the group type.
4. In the **Master Groups** drop-down list, select the master group.
5. Select the category that has the activity whose element you want to edit, then click **Edit.**
6. In the Edit Group window, click the **Lists** tab.
7. Under **Lists**, select the element you want to edit.
8. Select the element list item you want to edit, then click **Edit**.
9. In the **Enter Element** field, edit the element description.
10. When finished, click **OK**.

Setting Up Activity Elements

Setting up Activity Elements is a two step process. First you must activate the elements when creating master groups. Next, you add activity element list items at the category groups level. You must choose at least one item from Element 1 when you associate an individual with an activity. You can also set up elements through Add/Edit Lists in Group Setup.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select **Activity**.
4. Click **Add**, and then select **Add Master Group**.
5. In the **Group Name** field, enter a name for the master group.
6. On the **Levels** tab, in the **Master Level Name** and **Level 1 Name** fields, edit the information as necessary, then click **Next.**
7. On the **Settings** tab, select the options you want for the master group, then click **Next**.
8. On the **Reserve List** tab, enter a name for **Use List 1**.
9. **Optional**: Select **Use List 2--4** depending on your needs. Enter a name for each element list.

   > **Tip**
   >
   > If your element has numbers as part of the name, you can place a leading 0 in front of numbers 1-9 so they fall in numeric order on reports. For example, 01, 02, 03, and so forth. Otherwise, numbers like 10, 11, display after 1.

10. Click **Next.**
11. The **Finish** tab includes a summary of the new master group. To edit a tab, click **Back**. Otherwise, click **Finish**.

1. In the Group Setup window, with the master group still highlighted, click **Add**, and select **Add Category**.
2. Enter a name for the roster group.
3. **Optional**: On the **Settings** tab, add a quick code and location of where the activity is to take place.
4. Click the **Lists** tab.
5. Click **Element 1**, then click **Add**.
6. Enter a description for the element. If you are going to enter several element list items, select **Add Another**.
7. **Optional**: On the **Roster Fields** tab, select to use any additional roster fields to associate an individual with an activity. If you are going to enter several categories, select **Add Another**.
8. When finished, click **OK**.

Additional Field Information

Group Options

Start Date
Select the date that the activity is to begin.

Use Comments
Select to include comments. Comments can be entered for master groups and categories.

Use Quick Code
Select to use a quick code for a group. You can enter a Quick Code in the Locate field in the View/Edit Activity Groups or Enter/Post Attendance to find an activity quicker.

Use Location
Select to use a location for an activity. You can enter a location for where the activity is to be held.

Enter/Post Options

Mark Detail
Select to activate detail marking fields. Detail marking fields allow you to mark individuals present or absent. You can also set up fields such as a Yes/No field for Fees Paid or Brought Visitors to mark for each individual.

Single Grid Marking
Select to mark present or absent in one area. If cleared, you have two separate marking areas: Absent and Present.

Auto Popup Detail Marking
Select to automatically display an individual's information when you double-click the individual in the Mark Attendance window.

Return to Locate
Select to return the focus to the located field after marking attendance for the located individual in the Enter/Post Attendance window.

Roster Options

Auto View Roster
Select to view a roster by default when opening the Enter/Post Attendance window. With each field that you filter by, the roster changes as necessary.

Activity Examples

Here are some examples of activities you might track and how to set up Elements for them in ACS.

Category	Element 1	Element 2	Element 3
Music Program	Adult Choir Teen Choir Children's Choir	2008 2009 2010 Past Member Prospect	Soprano Alto Tenor Bass Pianist Organist
Arts	Musician Dance Painting Sculpture Theater Crafts	Ballet Ballroom Flute Piano Opera Acting Costuming	Amateur Professional Semi- Professional
Hobbies	Camping Hiking Gardening Photography Sewing Cooking Travel Canoeing Swimming		
Skills	Fund Raising Marketing Publicity Public Relations	Amateur Professional Semi-Professional	
Facility Management	Carpentry Electrical Painting Grounds Plumbing	Has tools /equipment Needs tools /equipment	Licensed
Committees/Groups	Board of Trustees Expansion Hospitality Finance Computer	Rotate off 2009 Rotate off 2010 Rotate off 2011 Past Member Willing to Serve	Member Chairperson Vice-Chair Secretary Treasurer
Church Training	Masterlife Experiencing		Participating Leader

	God Discipleship Class	Enrolled Completed Interested	Graduate Prospect
Blood Donor	A+ A- B+ B-	Gave Jan. 08 Gave June 08 Gave Jan. 09	
Analysis	Administrative Crafts Evangelism Helps Hospitality	Dominant - 1 Dominant - 2 Dominant - 3 Secondary - 1	
Hospitality	Reception /Dinner Funeral Dinner Guest Home Helping Hands Meals on Wheels Bible Study Hostess Youth Home Host	Serve 08 Serve 09 Serve 10 Willing to Serve Past Service	
Athletics (see next example as an alternative)	Baseball Softball Basketball	Play 2008 Play 2009 Past Player	Player Coach
Softball	Red Team Green Team Blue Team	Play 2008 Play 2009 Past Player	Pitcher Player Coach
Adopt - A - Student	Adopter Adoptee	2007-2008 2008-2009 2009-2010	

Here is an example of an activity you might track using the comment, date, and number options:

Category	**Element 1**	**Comment**	**Date**	**Number**
Hospital List	General Hospital St. Francis Hospital	Use the comment line to enter the reason for admittance	Date Entered	Room Number

Other examples using the optional comment, date, number and amount fields:

Comment:

Explain how a person became a part of a group (appointed, elected, etc.)

Date:

- Show start/end date for a class (for example, you have three groups studying Experiencing God this semester. Enter the particular start dates 9/4, 9/6, 9/12 for the three sections).
- Record date a time/talent or spiritual gifts inventory was completed
  Show date of prayer request

Number:

- Indicate # of journals needed for a class
- # of passengers the individual's vehicle will hold (for a volunteer driver)

Amount:

- Show cost of textbook for a class
- Membership dues for a group (e.g. softball team players pay $5 for snacks during games)
- Voluntary contributions requested in an organization (choir members asked to give $5 each to help defray cost of cleaning robes)

Activity Fields

You can use Activity Fields to further define each individual's participation in an activity. There are five available Activity Fields.

- **Alpha Field 1, 2** — This field can store textual information. For example, if you have an Activity Category for Athletics, you can select **Use Alpha Field 1**, name the field Shirt Size, and define the size for each player. Then, you can select **Use Alpha Field 2**, name the field Pants Size, and define the size for each player.
- **Date Field** — This field can store a date. For example, if you have an Activity Category for Committees, you can select **Use Date Field**, name the field Date Nominated, and then define the date each member was nominated for their spot on the committee.
- **Use Number Field** — This field can store a number. For example, if you have an Activity Category for Athletics, you can select **Use Number Field**, name the field Jersey Number, and then define each player's jersey number.
- **Use Currency Field** — This field can store a monetary amount. For example, if you have a Fund Raising activity category, you can select **Use Currency Field**, name the field Amount Collected, and then define the amount of money each member has collected.

Viewing Activity Field Information

There are several ways to view Activity Field Information for individuals.

Reports

When you select to include Activities information on People reports, the Activity Field information prints. You can also print detailed information on an Activity Group and the Activity Field information is included.

1. Under **Manage Records**, click the **Groups** tab.
2. In the drop-down list, select **View/Edit Activity Groups**.
3. Click **Go** .
4. In the **Master Group** field, select the master group.
5. In the **Category** list, select the group.
6. In the grid, right-click and select **Print Detail**.

Individual Activities

You can view Activity Fields information in an individual's Activities record.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual**.
3. Click **Go** .
4. Select the individual and click **View/Edit.**
5. Click the **Groups** tab.
6. Click the **Activities** sub tab.
7. Select the **Group** you want to view information for.
8. Click **Edit**.
9. Click the **Activity Fields** tab.

Searches

You can perform a search for specific information in Activity Fields.

1. Under **Searches and Reports**, click **Searches**.
2. Under **Search On**, select **All Records**.
3. Under **Include Records That**, select **Meet Criteria for all Field Areas (And)**.
4. Under **Search Output Flag**, select **Matching Individuals**.
5. Click **New Search**.
6. In the **Available Fields** list, double-click **Activity Rosters**.
7. Click the **Activity Fields** tab.
8. Enter the information you are searching for.
9. Click **OK**.
10. Click **Process**.
11. To view the results, click the **Results** tab.

Working with Activity Fields

You can set up Activity Fields when you create an activity group, or you can edit the group to add more fields to use. You can also define Activity Fields when you add an individual to a group, and you can edit Activity Field information for an individual or multiple individuals.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. Select the **Master Group** the Group is in.
4. Select the **Group**, and then click **Edit**.
5. Click the **Roster Fields** tab.
6. Select and name the **Activity Fields** you want to use.
7. Click **OK**.

Creating a New Master Group

You can create a new master group for Activities.

It's helpful to think of a Master Group as a filing cabinet drawer that contains folders of similar information. Master groups are the starting point when creating activities. They're at the top of the activity structure, and you can use them to categorize similar groupings of individual records. You can have an unlimited number of categories under the master group heading.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select **Activity**.
4. Click **Add**, and select **Add Master Group**.
5. In the **Group Name** field, enter a group name.
6. On the **Levels** tab, you can edit **Master Level Name** and **Level 1 Name** fields, then click **Next**.
7. On the **Settings** tab, select the group, enter/post, and roster options you want, then click **Next**.
8. On the **Reserve List** tab, you can select and set up reserve lists. List 1 is a required field, and you can change its description. Lists 2, 3 and 4 are optional.
9. Click **Next**.
10. On the **Finish** tab, review the summary of the master group's information. If you need to edit anything, click **Back**. To add another master group, under **Options**, select **Add Another**.
11. Click **Finish** to create your new master group.

Creating a New Master Group for Class or Worship

You can create a new master group for Class/Worship and Small Groups. Small Groups are set up in Access ACS.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select **Class/Worship**.
4. Click **Add**, and select **Add Master Group**.
5. In the **Select Master Group** drop-down list, select a **Class Level** or **Worship** and click **OK**.
6. In the **Group Name** field, enter a group name.
7. On the **Levels** tab you can edit **Master Level Name** and **Level 1 Name** fields, and then click **Next**.
8. On the **Settings** tab, select the options you want to use, and then click **Next**.
9. On the **Reserve List** tab, you can select and set up reserve lists. List 1 (Position) is a required field. Lists 2, 3, 4, and 5 are optional, and they can be set up either at the Master Level or the Roster Level.
10. On the **Optional Settings** tab you have the option to select **Setup Detail Marking Fields**, **Add Events**, and **Add Position**. Click **Next**.
11. On the **Marking Fields** tab you can add, edit, delete, sort, and print **Marking Fields**. Click **Next**.
12. On the **Lists** tab you can add, edit, delete, sort, and print events and positions. Click **Next**.
13. The **Finish** tab includes a summary of the new master group. To edit a tab, click **Back**. Otherwise, click **Finish**.

The Groups Setup Menu

On the Group Setup menu, you can add, edit, or delete existing groups and arrange the way they display in drop-down lists. You can add master groups, add, edit, or delete activity categories, divisions, or departments, and reorder how groups display.

You can also add or edit list items for events and positions or perform group maintenance tasks such as clearing markings, deleting rosters, or attendance, and update the date last attended. In addition, you can copy a master group and its components, such as rosters, dropped records, and deactivated groups.

The **Options** tab lets you select the format for names that print on your reports. You can print a formal label name, informal label name, or custom label name. The name options selected from the Options tab only affect reports printed from Enter/Post Attendance, Inquiry, View/Edit Groups, and Add/Edit Individuals.

To get started, select **Activities** in the **Group Type** drop-down list, then click the appropriate link below to learn about each area. Only groups that you have user rights to edit display.

Adding or Editing Lists in Groups

In Add/Edit Lists window you can add, edit, delete, sort, or print events and positions. This option works the same as the Lists tab in the Edit Group window.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select the group type.
4. In the **Master Groups** drop-down list, select the master group.
5. Click **Add/Edit Lists**.
6. Under **Fields**, select **Events** or **Position**, then click **Add**.
7. In the **Enter Event** or **Enter Position** field, enter the new event or position.
8. **Optional**: To add another event or position, select the **Add Another** option.
9. Click **OK**.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select the group type.
4. In the **Master Groups** drop-down list, select the master group.
5. Click **Add/Edit Lists**.
6. Under **Fields**, select **Events** or **Position**, then click **Edit**.
7. In the Edit window, edit the event or position.
8. Click **OK**.

Changing a Parent

In the Change Parent window, you can move a class to a different department or division. You can move a department to a different division. You cannot move divisions.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the Group Setup window, select a master group, then click **Change Parent**.
4. **Optional**: In the **Locate** field, enter the **Quick Code** for the class or department.
5. **Optional**: To make deactivated classes or departments available, select **Show Deactivated**.
6. In the left pane, select the class or department you want to move.
7. In the right pane, select the department or division into which you want to move the selected class or department.
8. Click **OK**.

Copying a Master Group

Copying a group copies a master group and all of its components. You can include rosters, dropped records, and deactivated groups, and you can rename the master group.

When you copy a group, the start date is the same as the original, so you'll need to change the start date before you add individuals to the roster groups. Copying a group does not copy Marking Fields or Member Status and Record Type selections, so all records display in Enter/Post Attendance unless you set up a filter on the records.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select the group type.
4. In the **Master Groups** drop-down list, select the master group to copy, then click **Copy Group**.
5. In the **Master Group Name** field, enter the name of the new group.
6. **Optional**: To copy deactivated groups, select **Copy Deactivated Groups**.
7. **Optional**: To copy rosters, select **Copy Rosters**.
8. **Optional**: To copy dropped rosters, select **Include Dropped Rosters**.
9. Click **OK**.

Performing Small Groups Maintenance

In the Maintenance window, you can clear group markings, deleted rosters, or transactions. You can also update the date last attended for a group or reset the small groups.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select **Small Groups**.
4. Select the small group you want to work with, then click **Maintenance**.
5. Select the appropriate option, then click **Start**.

Additional Field Information
Clear Markings Deletes small groups markings for the selected year only. Individual roster records are not deleted with this option and will remain in the system. **Clear Deleted Rosters** Deletes roster records. Deleted roster records consist of individual records that have been completely deleted, along with their markings, from a roster. As individual roster records are deleted, a record is added into the Deleted Roster File with information regarding the deletion. The Deleted Roster File can be used to ensure that a deleted item is completely removed from the Group List menu. For example, if you wanted to delete a List item from a roster and you receive a message indicating that the item was found in the Deleted Roster file, you can use the Deleted Rosters option to completely delete the item from all groups on the Group List menu. You can clear all deleted rosters or those deleted within a specified date range. **Clear Transactions** Clears transactions from the Transaction file. This is the file that the Roster Changes List report reads from. The Transaction file contains transaction records of any individuals that are added, dropped, deleted, transferred into, or transferred out of a roster. The Transactions option does not delete attendance markings. You can clear all transactions or those cleared within a specified date range. **Update Date Last Attended** Click to update the Date Last Attended for all individuals in all groups. **Reset Small Groups** Click to clear the small groups that display under the Small Groups Master heading. You should reset your small groups if your groups in ACS do not match the list of groups for Access ACS.

Reordering Activity Groups

When you reorder groups, you can sort master groups by manually moving them up and down or use the **Alpha Sort** option to sort them alphabetically.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. Click **Reorder**.
4. Under **Group**, select a group to move.
5. Click **Move Up** or **Move Down**. Repeat this step until the groups are ordered the way you want.
6. **Optional**: Click **Alpha Sort** to put the groups in alphabetical order.
7. Click **OK**.

Working with Activity Elements

You can add elements to your list fields. The list field entries display when you are in the View/Edit groups window or the New Roster window. You can also edit, delete, or alphabetize existing element list items, and alphabetize list items.

1. Under **Advanced Tools** click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the **Group Type** drop-down list, select the group type.
4. In the **Master Groups** drop-down list, select the master group.
5. In the grid, select the group whose list field you want to add elements to, then click **Edit**.
6. In the Edit Group window, click the **Lists** tab.
7. Under **Lists**, click the **Element** that you want to add elements to and click **Add**.
8. In the **Enter Element** field, enter a description for the element.
9. Click **OK**.

Viewing and Editing Groups

The View/Edit Groups window allows you to see the roster for a group, add an individual to a group, copy or transfer individuals to another group, and drop or delete individuals from a group. You can right-click the grid area to access print options and to export the grid. For additional information, see Printing Options from the View and Edit Activity Groups Window.

Copying or Deleting an Activity Group

You can select individuals of an activity group and copy them to another activity group. If you know all the individuals from one category are going to participate in another category, this is a quick way of setting up all the individuals into the other category in one process.

1. Under **Manage Records**, click the **Groups** tab.
2. In the drop-down list, select **View/Edit Activity Groups**.
3. Click **Go** .
4. In the **Master Groups** drop-down list, select the master group that has the category with the individuals you want to copy.

5. In the left pane, select the category you are copying the individuals from.
6. Click **Filter**, and select the elements to filter the records by.
7. Click **OK**.
8. In the right pane, select the individuals you want to copy to another category.

> **Tip**
>
> To select multiple individuals, hold down the **Ctrl** key on your keyboard while you select the individuals.

9. Click **Copy**.
10. In the New Roster window, select the category and enter the necessary information.
11. Click **OK**.

You can also delete all of the individuals in an activity group. Once you do this, you CANNOT recover the data except by restoring a backup. That may mean losing the information that has been entered since the backup was last performed. Some organizations have security settings that prevent volunteers or other users from deleting activity groups.

1. Under **Manage Records**, click the **Groups** tab.
2. In the drop-down list, select **View/Edit Activity Groups**.
3. Click **Go** .
4. In the **Master Group** drop-down list, select the master group that has the category with the individuals you want to delete.
5. In the left pane, select the category.
6. Click **OK**.
7. In the grid, select the individuals you want to delete.

> **Tip**
>
> To select multiple individuals, hold down the **Ctrl** key on your keyboard while you select the individuals.

8. Click **Delete**.
9. When the confirmation message displays, click **Yes**.

Printing from the View and Edit Activity Groups Window

Printing options are accessible by right-clicking the grid area on the View/Edit Activity Groups window.

1. Under **Manage Records**, click the **Groups** tab.
2. In the drop-down list, select **View/Edit Activity Groups** and click **Go** .
3. In the **Master Group** drop-down list, select the master group.
4. In the **Category** list, select the category you want to print for.
5. Right-click in the grid area and select **Print Detail**, **Print List**, or **Print Grid**.

Working with Individuals' Activities

Adding Multiple Individuals to an Activity Group

When you have a list of the members of a group, it is faster to create the group all at once than to edit each individual record. For example, if you have the roster for this year's baseball team, you can create the team in one location by using the Groups functionality in Activities. That is faster than editing each team member's record one at a time.

1. Under **Manage Records**, click the **Groups** tab.
2. In the drop-down list, select **View/Edit Activity Groups** and click **Go** .
3. In the **Master Groups** drop-down list, select the master group with the category you want to add the individuals to.
4. **Optional**: To show deactivated groups, select **Show Deactivated**.
5. Select the category you want to add individuals to and click **Add**.
6. In the New Roster window, select the **Master Group**.
7. In the **Element 1** drop-down list, select an entry.
8. **Optional**: If you have created other element fields, select entries from the drop-down lists.
9. Click **Select People** to select from all the individuals in your organization.
10. **Optional**: To show results for names according to a particular element, member status, or position selected in the New Roster window, select **Filter**.
11. Locate the individual you want to add to the activity.
12. Select the individual and click **Add** .

> **Tip**
>
> You can also double-click on an individual to add them to the Individuals Added to Group list.

13. **Optional**: To add more individuals to an activity, repeat steps 12 and 13.
14. Click **OK**.
15. In the New Roster window, click **Close**.

Deleting an Individual from an Activity Group

When you are working with an activity as a group, you have the option to delete names from the activity group listing. Remember that deleting an individual from a group will also delete the entry on his/her individual record. If you want to maintain historical information on participation, change one of the elements instead of deleting the individual from the group.

1. Under **Manage Records**, click the **Groups** tab.
2. In the drop-down list, select **View/Edit Activity Groups** and click **Go** .
3. In the **Master Group** drop-down list, select the master group that has the activity with the individuals you want to delete.
4. In the **Activities** list, select the category you are deleting the individual from.
5. Select the name of the individual you want to delete.

> **Tip**
>
> To select multiple individuals, hold down the Ctrl key on your keyboard while you select the individuals.

6. Click **Delete**.
7. When the confirmation message displays, click **Yes**.

Deleting Individual Activity Records

When an individual is no longer participating in one or all activities, and you no longer want to maintain historical records of his or her participation, it is time to delete their activity records. This is also a helpful tool if you mistakenly enrolled them in an activity and need to correct the records.

Note

Deleting an individual's activity record will also delete all of his or her markings.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select the individual for whom you want to delete an activity record and click **View/Edit.**
4. Click **Groups** tab.
5. Select the activity record you want to delete and click **Delete**.
6. When the confirmation message displays, click **Yes**.

Dropping an Individual from an Activity Group

When you are working with an activity as a group, you have the option to drop individuals from the activity group listing. Dropping an individual from a group adds a Date Dropped to the record for use with filters, searches, and Attendance reports.

1. Under **Manage Records**, click the **Groups** tab.
2. In the drop-down list, select **View/Edit Activity Groups** and click **Go** .
3. In the **Master Group** drop-down list, select the master group that has the activity for the individuals you want to drop.
4. In the **Activities** list, select the category you are deleting the individual from.
5. Select the individuals you want to drop and then click **Drop**.
6. When the confirmation message displays, click **Yes**.

Tip

Dropped records don't display on the**Groups** tab in the View/Edit Individual window unless you select **Show All**, but the records still print on reports unless you remove them by using a filter or search before printing.

Editing Individual Activity Records

Editing individual activity records often happens when someone is placed in a new position in the group. For example, Tom Jones may be a member of the Finance Committee, and has now agreed to serve as Secretary. You'll want to edit his individual record to reflect this change.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select the individual with the activity record you want to edit and click **View/Edit.**

4. Click the **Groups** tab.
5. Select the activity record you want to edit, then click **Edit**.
6. In the Edit Roster window, make any necessary changes.
7. Click **OK**.

Entering Individual Activity Records

When a new person joins your organization and signs up for an activity, or a current member decides to join an established activity group such as the Choir, you need to edit the individual activity record to enroll them in the group.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select the individual you want to enter an individual activity record for and click **View/Edit**.
4. Click the **Groups** tab.
5. Click **Add**.
6. In the **Master Group** drop-down list, select the master group which has the activity you are enrolling the individual in.
7. In the **Category** list, select the category you are enrolling the individual in.
8. Under **General Fields**, select an **Element 1** item to the record.
9. If you have created element lists, select any additional information under **General Fields**.
10. If you have created roster fields, enter any appropriate information under **Additional Fields**.
11. To add the individual to another category, select **Add Another**.
12. Click **OK**.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select the individual you want to enter an individual activity record for and then click **View/Edit**.
4. Click the **Groups** tab.
5. Click **Quick Entry**.
6. In the **Master Group** drop-down list, select the master group.
7. In the **Category** list, select the category you are enrolling the individual in.
8. Under **Element 1**, select an item for the record.
9. If you have created element lists, select any additional elements.
10. If you have created roster fields, enter any appropriate information in the fields available on the lower right of the window.
11. Click **OK**, then **Close**.

Entering Individuals Quickly

The Quick Entry feature allows you to:

- Enroll someone quickly in multiple activities
- See all the choices (elements) for a category, reserve fields, and roster fields at one time
- Edit, drop, or delete an individual's current enrollment status
- See the activities the individual is already enrolled in

Tip

You cannot add new categories or elements from Quick Entry. You have to create the options in Groups Setup first. If you click within the list and then press **Insert** on your keyboard, you can add new Element List Items from Quick Entry.

If you have created lists and roster fields, they display in this window.

Additional Field Information

Master Group
From the drop-down list, select the master group with the activity the individual will participate in.

Locate
If you have a quick code for an activity, you can enter the code to quickly select the activity from the list. You can also enter the group name.

Date Added
In this field, the date that an activity was entered for an individual displays.

Date Last Changed
In this field, the date that an activity entry was last modified displays.

Date Dropped
In this field, the date that an individual was dropped from an activity displays.

Printing Individual Activity Records

Printed copies of individual activity records are helpful in situations such as:

- When a member is being recognized for his or her service in the organization.
- When a nominating committee is considering candidates for a job, but wants to be sure they don't overload the individuals being considered.
- When a member wants to see everything they have signed up for.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select the individual whose activity record you want to print and click **View/Edit**.
4. Click the **Groups** tab.

5. In the **Activities** sub tab, right-click in the grid, and select **Print List**, **Print Detail**, **Print Label**, or **Print Grid**.
6. Click **Print** .

Roster Entry

New Roster is another way of assigning an individual to an activity. The New Roster window displays when you select the **Add** or **Edit** option.

Below are the areas that are available on the New Roster window:

Additional Field Information

Master Group
Displays all the master group levels you have created. Select the group that the individual is participating in from the drop-down list.

Locate
Enter an activity's quick code to quickly select the activity from the list. You can also enter the group name.

Effective Date
The date that any changes made become effective.

Show Deactivated
Select to display deactivated groups.

Group
Displays the category level you have selected if you have created category levels for the group.

Add Another
Select if you are adding an individual to several activities. When Add Another is selected, the Roster Entry window remains open to make entering several activities faster.

Print
Click to print a label that includes the selected individual's name according to the Name Options selected from the **Options** tab in Group Setup, the Roster Name, and the Location.

General Fields
If you have created element selections for the activity, they display here.

Additional Fields
If you have created Roster Fields for the activity, they display here.

Activation Dates
Select the date, if other than the current date, that the individual was added to or dropped from the roster.

People Merge

Using People Merge, you can combine information from two individual records into one record. This assists you with tracking accurate information for each individual in ACS.

Before Merging People Records

Making a backup is the first and most important step when merging records. After you merge records, a duplicate record is deleted from ACS, so having a recent backup is the only way to reverse any changes made when merging records.

Once you've backed up your data, choose your **Preferred** and **Duplicate** records in ACS.

Ideally, the preferred record contains more information and is more up-to-date than the duplicate record. The merge often uses information from the preferred record rather than the duplicate record, and for this reason, it's important to look at both records in View/Edit Individual and compare the data before performing a merge.

When you merge records, the duplicate record is merged into the preferred record. Single-value dates, fields, and lists in the duplicate record are overwritten unless the same field in the Preferred record is blank. To see which data changes during a merge, see Merging Data in ACS People and Family and Contributions Data Changes when Merging Records. You could also print the duplicate record's People Profile report before you merge, so that you have a copy of the original information.

What if I need to merge more than two records?

You can only merge two records in ACS; however, if an individual has two duplicate records and one preferred record, you can perform two merges. First, carefully select your preferred record and your two duplicate records (the preferred record usually contains more information). Then, merge the duplicate record with the least information into the duplicate record with more information. Once you have one duplicate record, you can then merge the data into the preferred record.

In addition, you can edit your People Setup Settings to check for duplicates when entering new records. This can help you avoid merging duplicate records.

People Merge Records Security

Since merging people records changes data and deletes the duplicate record after the merge, you can restrict Merge Records to certain staff members in your organization. Any user who does not have security rights to Merge Records will not see that option on the Workbench or Classic menus.

The Merge Records security rights default to the value used for Change Family Unit. You can change these security rights in Add/Edit Users.

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**.

Merging Data in ACS People

When you merge people records, it's important to choose the preferred and duplicate records carefully.

When two records merge in ACS, the data rules vary according to the area of the individual's record. In some cases, information from the duplicate record merges to the preferred record, but in other areas of the program, information from the duplicate record does not transfer to the preferred record unless the field is blank.

If the People Changes Log is activated, the report lists the duplicate record as **Individual Merged**, and the preferred record lists the changes as **Individual Updated.**

Family and Contributions Data Changes when Merging Records

Depending on the records merged, family and contributions information may change.

If	Then
The duplicate (Merge From) record is the only person in the family.	All family data is removed from ACS.
The duplicate record is not the only person in the family.	All other family members' data remains in ACS.
The preferred record and duplicate record are in the same family.	The records are merged, and no family data changes in ACS.
The duplicate record has a combined envelope number.	The remaining record in the duplicate's family is updated to no longer have a combined envelope number.
The preferred record has a combined envelope number.	All gifts from the duplicate record are added to the Head's record for the merged individual.

Merging People Records

Merging people records helps to ensure that your data is accurate and up-to-date by merging duplicate records.

For example, suppose an individual's address changes. A volunteer in your organization updates their address, but that individual has a duplicate record in ACS. If you search or filter to pull addresses before sending a mailing and the duplicate record is found, the mailing could be delivered to the incorrect address.

When you merge individual records, the merged record is the more accurate record, and the duplicate record is deleted.

We recommend that you back up your ACS data before merging records.

If you know the names of duplicate records, perform the following procedure:

1. Carefully determine the preferred and duplicate record. To learn more about this, see Before Merging People Records.
2. Under **Manage Records**, click the **Tasks** tab. (*If you don't see the Manage Records section, you're ACS program is probably running the Classic menu instead of the Workbench menu. Turn on the Workbench menu.*)
3. In the drop-down list, select **People Merge Records**, and click **Go** . The People-Merge Individual window displays.
4. On the Merge Individual tab, click **Find Person**. The Find Person window displays.
5. Select the name with duplicate entries, and click **OK**. The People-Merge Individual window displays with The name, contact information, and member status of both duplicate entries displays.

   > **Useful Information**
   >
   > If more than one duplicate entry exists, the People-Merge Individual window displays the amount of duplicate information in the form of a percentage that you can select.

   OPTIONAL: To view additional information on the record, click **View Individual**.
   OPTIONAL: To view and compare the selected individuals' data in Access ACS, click **Access ACS** .
6. Click **Merge**.
7. When the confirmation message displays, click **Yes**.
8. For each field, select the fields to keep. For some information, such as home, mailing, or e-mail addresses, you can keep both addresses by selecting a new address type for the second address.
9. When the merge is complete, click **OK**.

If you don't know the names of any duplicate records and want ACS to locate them for you, perform the following procedure:

1. Under **Manage Records**, click the **Tasks** tab. (*If you don't see the Manage Records section, you're ACS program is probably running the Classic menu instead of the Workbench menu. Turn on the Workbench menu.*)
2. In the drop-down list, select **People Merge Records**, and click **Go**. The People-Merge Individual window displays.
3. On the Retrieve Suggested Duplicates tab, you have two options:

- You can click **Use Last Search Results** > **Searches** first to retrieve your last selected duplicates. You can view more information about conducting searches. After setting your search criteria, click **Load Possible Duplicates**.
- You can click **Load Possible Duplicates** first, and the ACS program will perform the search with its own search criteria.

4. The Retrieve Suggested Duplicates grid displays with the search results.

> **Useful Information**
>
> The grid is sorted in order of percentage regarding what records are most likely to be duplicates that you can merge. Right-click anywhere in the grid to display print or export options for the contents of the grid.

5. Select a record, and click **Keep Selected**. The People-Merge Individual window displays with the duplicate record information.
   OPTIONAL: To view additional information on the record, click **View Individual**.
   OPTIONAL: To view and compare the selected individuals' data in Access ACS, click **Access ACS**.
6. Click **Merge**.
7. When the confirmation message displays, click **Yes**.
8. For each field, select the fields to keep. For some information, such as home, mailing, or e-mail addresses, you can keep both addresses by selecting a new address type for the second address.
9. When the merge is complete, click **OK**.

People Reports

In the People module, you can print reports containing various information about the individuals in your organization. Many customization options available for each report type, and the reports interface with Searches so that almost any type of report you want to print is possible.

There are many different reports available, and each report is highly customizable, so you can print each report in a variety of different ways. We recommend that you experiment with each report and examine the options available for each one.

People Card Reports

You can print a variety of index cards, rotary cards, and post cards from the ACS Reports window. You can print both family and individual cards, and you can change the printer margins on cards to customize how they print. If you're an ACS Organizations client, you can also print cards by performing a search on organizations.

Printing the People Directory Report

You can create a report of selected members or the entire membership of your organization using the People Directory report. The report prints a complete listing of records, and you can customize it using the available report options.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **People Reports**, then click **Go** .
3. In the upper sidebar, under **People Reports**, expand **Directories**.
4. Select the **People Directory** report and click **Customize**.
5. On the **Report Selections**, **Report Layout**, and **Report Options** tabs, select the options you want.
6. Click **Preview** to generate the report.
7. To print the report, click **Print Report**

People Extracts

The extracts available in the People module provide you with multiple options for exporting ACS data. You can export data as not configured files as well as "raw" data.

If you are sending data to an outside supplier, they will usually specify the format. The available file formats include Character Seperated Values, Comma Separated Values (**.csv), Data interchange (**.dif), DBase format (**.dbf), Excel (**.xls), Record Style (Columns of Values), Tab-separated text (**.txt), Tab-separated values (**.txt), and text (*. txt).

The ACS Extracts are available on the ACS People Reports menu under **Extracts**. To access the extracts in the Searches window, click **People Exports**.

Exporting Data Using the Cathedral Directories Export

You can export and send data to Cathedral Directories® to create a directory personalized for your church.
Once you export your data, you can send it to Cathedral Directories via e-mail.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **People Reports** and click **Go** .
3. In the upper sidebar, under **People Reports**, expand **Extracts**, select the **Cathedral Directories Export** and click **Customize**.
4. Click on the **Report Options** tab.
5. In the **Filename** field, click **Browse** to select the location or folder in which you want save the export file. You cannot change the file name of the cdexport.csv file.
6. To include certain e-mail or phone types, under **Field Selection**, in the **E-mail**, **Phone 1**, or **Phone 2** drop-down list, select the type to include.
7. To export the records from the last search conducted, under **Search Results**, select **Use Last Search Results**.
8. If you want to include any deactivated records in the export, under **Export Options**, select **Include Deactivated**.
9. Click **Extract**.
10. Once processing is complete, e-mail the extract file and your church's contact information to prepress@cathedraldirectorires.com.

Exporting Data Using the Customized People Export

The Customized People Export allows you to export People information to other software products. The Customized People Export is similar to the Standard People Export, but with the Customized People Export, you can choose what information to include in the export, and only that information is exported.

1. Perform a search for the individuals you want to include in the export.
2. When you have completed your search, click the **Search Information** tab.
3. Click **People Exports**.
4. Under **People Reports**, select **Customized People Export** and click **Customize**.
5. Click on the **Report Options** tab.
6. On the **Format** tab, in the **File Name** field, select a location for saving the file.
7. Under **File Format**, select the appropriate file format.
8. On the **Settings** tab, make the appropriate selections to set up your export.
9. On the **Layout** tab, under **Available Fields**, click the plus sign to expand a selection. Double clicking a selection adds all of the available fields under that selection to your export.
10. Select the field you want to include, and then click **Add**. To add all of the available fields, click **Add All**. To remove a field, click **Remove.** To remove all of the added fields, click **Remove All**. To rearrange the order of the Export Fields, click **Move Up** and **Move Down**.
11. To export the data, click **Extract**.
12. When the confirmation message displays, click **OK**.

Exporting to Microsoft Excel

If you export to Microsoft® Excel, you may need to format the date columns to display a date instead of a string of numbers,

1. In the Excel document, click the letter at the top of the column that contains dates. This should select and highlight the column.
2. Right-click on the highlighted part, and select **Format Cells**.
3. On the **Number** tab, select **Date** in the **Category** section.
4. In the **Type** section, select the desired format you would like. For example: 3/14/12 or 3/14/2012.
5. Click **OK**.

Exporting Data Using the Episcopal Life Magazine Export

You can send AFL Web Printing, Episcopal Life Magazine's mail-house vendor, the names and addresses of church members that want a subscription to Episcopal Life Magazine. Episcopal Life Magazine Export extracts this data to a file, which you can send to AFL web printing at MailListMaintenance@aflwebprinting. com.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **People Reports** and click **Go** .
3. In the upper sidebar, under **People Reports**, expand **Extracts**.
4. Select the **Episcopal Life Magazine Export** and click **Customize**.
5. Click the **Report Options** tab.
6. In the **Filename** field, click **Browse** to select the location or folder that you want save the export file to. You can change the file name of the EpcoExtr.xls file, but the name must be exactly eight characters.

7. In the **UEID** field, enter your Uniform Episcopal Identifier.
8. To include formal titles for the individuals, under **Export Options**, select **Include Title In Extract (i.e. Mr. or Mrs.)**.
9. To export the records from the last search conducted, under **Search Results**, select **Use Last Search Results**.
10. Click **Extract**.

Exporting Data Using the PDA Export

Note

This extract is not compatible with ACS OnDemand.

Use the PDA Export to extract ACS People data to a Personal Digital Assistant (PDA).

Before exporting, make sure that your PDA is set to HotSync® with Microsoft® Outlook®. When you load your Palm Desktop software, the install runs a check for Microsoft Outlook and prompts you to select the Microsoft Outlook synchronization option. Refer to your Palm Desktop software Help for more information about this option and how to select it.

When you export data for use with your PDA, we recommend that you put the data in the Contacts folder in Microsoft Outlook. Many PDA devices only synchronize with the default Contacts folder in Microsoft Outlook.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **People Reports** and click **Go** .
3. In the upper sidebar, under **People Reports**, expand **Extracts**.
4. Select the **PDA Export** and click **Customize**.
5. On the **Report Options** tab, select the options that you want for the export.
   - **Include Deactivated** — Select to include deactivated records in your export.
   - **Filter** — Select to create a filter for the records in your export. To configure the filter, click **Select**.
   - **Use Last Search Results** — Select to include records from your last search results in your export.
   - **Show Unlisted Phone** — Select to include unlisted telephone numbers and e-mail addresses in your export.
6. Click **Extract**.
7. When the confirmation message displays indicating the number of contact records that will be created in Outlook, click **Yes**.
8. In the ACS Outlook Export window, make the appropriated selections for the export.
   - **Existing Folder** — Select to export ACS data to an existing Microsoft Outlook folder. Select the folder you want to export to from the list.
   - **New Folder** — Select to create a new folder in Microsoft Outlook to export ACS data to. In the New Folder field, enter the name of the new folder.
   - **Target Categories (Separated by Commas)** — Enter the category names, separated by commas, to add the ACS data you export to Categories in Microsoft Outlook. If you enter a category name that does not already exist in your Microsoft Outlook Master Category List, the category is created when you execute the export.
   - **Continue Export** — Click to proceed with the export once you have selected your target folder and target categories.
   - **Map Fields** — Click to select the ACS phone numbers and e-mail addresses you want to use for specific phone and e-mail fields in Outlook.
9. Click **Continue Export**. ACS processes the export and Outlook Express opens displaying the exported contacts.

10. To move the exported ACS data to your PDA, perform a HotSync.

Exporting Data Using the Standard People Export

Use the Standard People Export to extract ACS People data in file formats that are compatible with various other software packages.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **People Reports** and click **Go** .
3. In the upper sidebar, under **People Reports**, expand **Extracts**.
4. Select the **Standard People Export** and click **Customize**.
5. Click on the **Report Options** tab.
6. On the **Format** tab, select the appropriate format options for the People Export.
7. On the **Settings** tab, select the appropriate export settings for the People Export.
8. Return to the **Format** tab and click **Print Legend** to print the People Export Legend.

> **Note**
>
> The People Export Legend is a report that identifies all exported fields. You must print the legend to know what information is included in which special field and to know the format and order of all fields. This information must be included in a header (created in the word processor). Use this guide to create the header file. The legend also gives details on field lengths.
>
> Be sure to include every field on the list in the header file, including all 10 special fields. Select all desired export options before printing the legend.

9. Click **Extract**.
10. When the confirmation message displays, click **OK**, then **Close**.

> **Exporting to Microsoft Excel**
>
> If you export to Microsoft® Excel, you may need to format the date columns to display a date instead of a string of numbers,
>
> 1. In the Excel document, click the letter at the top of the column that contains dates. This should select and highlight the column.
> 2. Right-click on the highlighted part, and select **Format Cells**.
> 3. On the **Number** tab, select **Date** in the **Category** section.
> 4. In the **Type** section, select the desired format you would like. For example: 3/14/12 or 3/14/2012.
> 5. Click **OK**.

People List Reports

You can print a variety of lists from the Reports window.

Activating and Printing the People Changes Log

When activated, the People Changes Log tracks changes made to individual records.

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **People** and click **Go** .
3. Click on the **People Changes Log** tab.
4. Select **Activate People Changes Log** and click **OK**.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **People Reports** and click **Go** .
3. In the upper sidebar, expand **Lists**.
4. Select **People Changes Log** and click **Customize**.
5. On the **Report Options** tab, select the settings you want for the report, then click **Preview**.
6. Click **Print Report** to print the report.

Printing the Census Report

You can print the Census Report to include all of the individuals in your database, only the individuals that were returned in your most recent search, or the individuals that match your filter selections.

The Census Report prints helpful statistical information including:

- Average Household size. This is calculated using the family number (ACS looks at each family number, counts all of them, and divides by the number of distinct family numbers).
- Number of males and number of females
- Number of Adults (18-20), Number of Adults (21-64), and Number of Seniors (65 and Over)
- Total families with children, total families without children, families with two parents, families with a single female parent, families with a single male parent, and children without parents
- A breakdown of individuals (including number and percentage of total) in different age groups
- Average, median, and modal age of Heads of Household, and average, median, and modal age of all individuals included in the report.
  - The **modal** age is the most frequently occurring age for those individuals who are heads of households.
  - The **average** age calculates the sum of ages and divides by the total number of individuals.
  - The **median** age is the middle occurring age, with half of individuals older and half younger. Number and percentage of male and female children, divorced individuals, married individuals, separated individuals, single individuals, and widowed individuals

You can also customize your report to include Deactivated People, Geographic Breakdown, City Breakdown, Geographic Code Breakdown, User-Defined Analysis, and Activities.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **People Reports** and click **Go** .
3. In the upper sidebar, expand **Statistics** and select **Census Report**.
4. Click **Customize** and select the settings you want to use.
   - **Include Deactivated People** — Select to include deactivated individuals on the report.
   - **Print Geographic Breakdown** — Select to print the total number and percentage of individuals that live In State, the total number and percentage of individuals that live Out of State, and the total number and percentage of individuals whose state of residence is unknown.
   - **Print City Breakdown** — Select to print a list of each city in your data, how many total households reside in that city, and the total percentage of individuals living in that city.
   - **Print Geographic Code Breakdown** — Select to print the number of individuals whose record includes a Geographic Code, and how many and what percent of individuals live in each zone.
   - **Print User-Defined Analysis** — Select to print statistics on your additional fields, including the number of males, females, and total individuals and the percentage of total individuals to whom your additional fields apply.
   - **Print Activities** — Select to print a list of activities with the number of individuals enrolled in each activity.
   - **Filter** — Select to apply a filter to your report.
   - **Use Last Search Result** — Select to use the results of your last search to print the report.

Printing the People Involvement - Summary Report

You can print a People Involvement - Summary from the ACS Reports window. The People Involvement - Summary report prints a listing of your organization's activity categories, the number of participants within each element of the categories, as well as the total number of participants for each category. The percentage of your organization's membership participating in each activity is also listed.

This report helps you track overall member participation. Deactivated individuals are included in the count, as are individuals with a record type of member, prospect, other, and organization. If an individual has been dropped or deleted from an activity, they are not included in the count on the report.

The People Involvement Summary, by default, prints a report that includes all of the possible activities. If you need to print only specific activities, you must select them.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **People Reports** and click **Go** .
3. In the upper sidebar, expand **Statistics**, then select **People Involvement - Summary**.
4. Click **Customize**.
5. On the **Report Options** tab, select the appropriate options to include in the report.
6. **Optional:** To print only the activities you select, under **Formatting**, select **Print Activities**, and then click **Select.** Otherwise, the report prints for all activities**.**
7. Click **Preview** to generate the report.
8. To print the report, click **Print Report** .

Printing the People Statistics Report

You can print a People Statistics report that prints a listing of a selected value, the number of individuals that match that value, and the percentage of your records that match that value.

For example, you can choose to generate statistics about City, and get a listing of all the cities that are part of the primary address for all of your members, the number of individuals who live in each city, and the percentage of your records that number comprises.

You can also print the People Statistics Report to display the total number of family and total number of records with a family position of head, spouse, etc., without doing a search. To do this, generate statistics on the family position.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **People Reports** and click **Go** .
3. In the upper sidebar, expand **Statistics**.
4. Select **People Statistics Report** and click **Customize**.
5. Under **Statistics Field**, select a value to generate statistics for in the drop-down list.
6. Click **Preview** to generate the report.

   To print the report, click **Print Report** .

Creating Name Badges in People

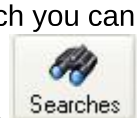
You can create name badges in the People module.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **People Reports** and click **Go** .
3. Under **People Reports**, expand **Labels**.
4. Select **Name Badges** and click **Customize**.
5. Under **Name Options**, select the type of label name you want to print on your name badges.
6. Under **Report Options**, select the options you want to apply.
7. Under **Search Results**, select **Use Last Search Results** if you want to use your last search results.
8. In the **Badge Style** drop-down list, select the badge style.
9. On the sample badge, select the line you want to format.
10. Under **Badge Setting**, select what field type you want to print on the selected line. To format the font for this line, click **Font**.
11. Repeat steps 8 to 10 for each line of the name badge.
12. Click **Preview** to view your name badges.

People Graphs

The Graphs option offers powerful statistical analysis and graphing capability for data in the People module. This data can be useful in making administrative decisions, including:

- What type of programs to develop to boost membership. For example, if you create a graph of members by age and see that a particular age group has a disproportionately small membership, you might decide to create programs that help build membership in that age group.
- What type of advertising to continue using and what type to discontinue using. For example, if you create a graph of members, prospects, and others by prospect source and see that none of the individuals heard about your church through TV ads, but a large percentage of them heard about your church through radio and newspaper ads, you may decide to discontinue using television ads and boost your number of radio and newspaper ads.
- What types of special accommodations to make for your members. For example, if you create a graph of members by restrictions and see that you have visually impaired members, you may decide to print some of your newsletters and bulletins in large print or order large print hymn books for those individuals to use.
- What data is missing in your database. For example, if you create a graph of members, prospects, and others by gender and discover that you have individuals with no gender listed, you can create a filter for individuals with blank gender and work through the list to add the gender information to the records.
- How to organize or assign teams for outreach purposes. For example, if you create a graph of prospects by city, you can search for contact team members that live in those cities and assign them to the prospects. This same approach can be used for organizing small groups, prayer groups, and cell groups.

In the Graphs window, you can also perform a search, which you can use to determine which results display in your graph. To perform a search, click **Searches** 

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You can even minimize the window and work in other areas of ACS, including other modules. However, if you post attendance or contributions, or update information included in the graphs you're working with, you'll need to refresh the graph to include those postings or changes. You can also include graphs when you define report views, allowing you to see only those graphs and reports that you need to run.

Customizing and Previewing the Activities Statistics Graph

The Activities Statistics Graph provides a breakdown of the individuals in an activity's Master Group or levels based on the selected field. You can choose to see statistics for any Individual List or Field, any Family List or Field, or any Address field. You can also subtotal your graph based on another field to narrow down your results.

For example, suppose you want to see a graph of your various music ministries, including your praise band, women's choir, and string ensemble. In **Group Options**, you would select to base your graph off of the Master Group (Music Ministry) and select All Levels. Then, in **Edit Layout**, you would subtotal by **Roster Group** (praise band, women's choir, and string ensemble). When you click preview, the graph displays a visual representation of those in your music ministry, which would be subtotaled by praise band, string ensemble, and women's choir.

Or, suppose you want to know the breakdown of sopranos, altos, and tenors in your women's choir. In **Group Options**, you would select Music Ministry in the **Master Group** field, clear **All Levels**, and select women's choir in the list of categories. Then, in **Edit Layout**, you would subtotal your graph by the category (women's choir), then by the element you use for your participants' voice range (**Element 1**, **2**, **3**, or **4**). When you click **Preview**, the graph displays a visual representation of those in the women's choir, subtotaled by voice range.

1. Under Searches and Reports, click the **Graphs** tab.
2. In the drop-down list, select **People** and click **Go** .
3. In the upper sidebar, under **Graphs**, select **Activities Statistics Graph** and click **Customize**.
4. On the **Report Options** tab, select the appropriate options.
5. Click **Group Options** to select the activity Master Group or category you want to work with.
6. Click **Edit Chart Layout** to select the field(s) on which to base your graph, then click **OK** to return to the **Report Options** tab.
7. Click **Preview**. Your graph displays in the Preview pane.

Customizing and Previewing the People Statistics Graph

The People Statistics Graph is a breakdown of the individuals in your organization based on the selected field(s). You can choose to see statistics for any Individual List or Field, any Family List or Field, or any Address field. You can also subtotal your graph by selecting an additional field to narrow down your results. To learn more, see Editing your People Graph's Layout.

For example, you can select Blood Donor and Include Members and see a graph that shows how many and what percentage of your members are blood donors, are not blood donors, are blood donors only in an emergency, or have no blood donor information on record.

Note

When you select the **ZIP Code** field, the People Statistics Graph displays only 5-digit ZIP Code numbers.

1. Under Searches and Reports, click the **Graphs** tab.
2. In the drop-down list, select **People** and click **Go** .
3. In the upper sidebar, under **Graphs**, select **People Statistics Graph** and click **Customize**.
4. On the **Report Options** tab, select the appropriate options.
5. To select the field(s) on which to base your graph, click **Edit Chart Layout**. Then, click **OK** to return to the **Report Options** tab.
6. Click **Preview**. Your graph displays in the Preview pane.

Editing your People Graph's Layout

In the Edit Chart Layout window, you can select the fields your graph is based on, your graph's type (pie, bar, or line), and the sort order of the graph. You can also change the title that displays on your graph.

1. Under Searches and Reports, click the **Graphs** tab.
2. In the drop-down list, select the appropriate module* **and click *Go** .
3. In the upper sidebar, select the graph you want to work with, then click **Customize**.
4. On the **Report Options** tab, select the appropriate options and click **Preview**.
5. Click **Edit Chart Layout** .
6. In the Edit Chart Layout window, select the appropriate options under **Summary Calculation**, **Grap h Type**, **"Other" Pie Slice**, and **Sort Order**.
7. Click **OK** to return to the customization window.
8. Click **Preview**. Your graph displays in the preview pane.