Access ACS Member and Attendee Guide

Contents

Member and Attendee Guide

Access ACS helps you stay connected with your church's activities, small groups, and events, as well as manage your personal information and giving.

Access ACS lets you:

- Create, view and join activities, classes, small groups, or special groups
- Register for events and manage registrations for yourself, family members and guests
- View your giving history, scheduled gifts, and contribute online
- View serving and volunteer opportunities and sign up for them within the program

If you serve as a group leader, check out the Group Leader Guide as well to learn how to manage your groups in Access ACS.

Home Page

After logging in, the Home Page displays. It gives you an overview of everything you do with your church, and it's also where you manage your profile information and account settings.

On the Home Page, you can see your activities, small groups, serving opportunities, calendars, classes, registrations, groups, and giving history.

The My Calendar widget displays current and future events. Up to ten items display, along with a link to view more. You can also click on the date on the calendar to view all of that day's events.

Your giving history is collapsed for privacy. If you want to expand the giving summary and view year-to-date giving amounts, click **Show Info**. To hide it, click **Hide Info**.

If you need to update your profile (a new address or telephone number) or your account settings (a new e-mail address, password, or payment methods), you can do this from the Home Page.

Members and attendees can:

- Manage their individual and family information.
- Request to join classes, activities, or small groups.
- View contributions.
- View small group connections.
- View and register for upcoming events.
- View classes, activities, and small groups to which they belong.
- View rosters.
- View available calendars
- Search for other members.

Search for Serving Opportunities

You can search for available serving or volunteer opportunities at your organization.

To view details about a serving opportunity, click the text that displays in the **Position** column. If no serving opportunities are available, nothing displays.

1. On the Home Page, in the **I want to view** section, click **Available Serving Opportunities**.
2. Under **Serving Opportunities**, select **Show all open opportunities** from the drop-down list.

If you know the type of serving opportunity you would like serve in or volunteer for, enter the information in the text box provided, then click **Find Opportunities**. The available matches display in the **Serving Opportunities** section.

After you view a list of opportunities, you can volunteer for them online. This sends an email to the opportunity organizer to let them know you are interested.

1. In the **Position** column, click the name of the serving opportunity.
2. Click **Interested**.

Search for Small Groups

You can use the basic or advanced search to find available small groups.

1. On the Home Page, under **I Want to View**, click **Available Small Groups**.
2. Enter a keyword to find groups that may interest you, then click **Find Groups**.
3. The small groups you can view display, including specific information about groups.
    - To express interest in a small group, click **Request Info** in the appropriate card. The Small Groups Contact Request page displays.
    - If the small group creator selected to **Allow members to automatically join this group**, click **Join Group.** This lets you join the group without having to wait for approval from the small group leader.

1. On the Home Page, under **I Want to View**, click **Available Small Groups**.
2. Click the **Advanced Search** link.
3. Select the criteria for the small group search you want to run, then click **Find Groups**.
4. The Available Small Groups page displays.
    - To express interest in a small group, click **Request Info** in the appropriate card. The Small Groups Contact Request page displays.
    - If the small group creator selected to **Allow members to automatically join this group**, click **Join Group.** This lets you join the group without having to wait for approval from the small group leader.

View Group Rosters

On the Home Page, you can view activity, class, or group rosters.

To view rosters

1. Under **My Groups**, click on the activity, group, or class you want to view a roster for.
2. The roster displays. You can filter activity rosters by master groups, categories, and elements. You can also show the roster history, print or export the roster, and print mailing labels or a directory.

Make a Payment

On My Overview page, you can make payments toward event registrations for yourself and any guests you registered.

To make a payment

1. On the Home Page, in the **My Registrations** section, click on the **My Registrations** tab.
2. Click **Make Payment** for the desired event.
3. Select **<new payment method>** from the drop-down list (If using a saved method, select your desired saved payment method), then click **Next**.
4. Enter your information in the available fields.
5. For **Payment Type**:
    - If you select Visa, MasterCard, Amex, or Discover, enter your card number and expiration date.
    - If you select ACH, enter your Routing (ABA) Number and Account Number from your check. Not sure where to find these numbers? View a sample check.
6. Click **Submit Changes**.
7. Enter the **Total Payment Amount** you want to pay. This amount must be more than $5.00.
    - To apply all of the **Total Payment Amount** to your fees, enter the total amount in your **Payment Amount** field.
    - To apply all of the **Total Payment Amount** to guest fees, enter the total amount in the guest **Payment Amount** field.
    - To apply the **Total Payment** Amount to both set of fees, enter the amounts in the respective **Payment Amount** fields. The total of all **Pay ment Amount** fields must equal the **Total Payment Amount** entered. For example, the **Total Payment Amount** is $100.00, you enter $75.00 for yourself and $25.00 for your guest.
8. To keep your payment method on file for future use, select **Keep this payment method on file for future registrations**. Enter a nickname for the payment method. For example, "Dad's Visa Card" or "Susan's Checking Acct".
9. Click **Process**.

Select Personal Preferences

On the Personal Preferences page, you can customize your privacy and viewing preferences.

You can include your family and individual information in online directories and choose to display photos when you view online directories. To view online directories, you must have appropriate rights.

To select your personal preferences

1. Point to **Home**, then click **My Account**.
2. Click the **Personal Preferences** tab.
3. On the **Personal Preferences** tab, select the options that you want.
4. Click **Save**.

Manage My Payment Methods

The Manage Payment Methods tab lets you add, edit, and delete credit card and electronic check information for your account.

Update payment methods

Adding and managing payment methods is an important part of fully utilizing online giving and event registration. All credit card or electronic check bank account information is displayed on the same tab but separated into boxes we call "payment method cards".

Payment cards display:

- a description of the payment method.
- account information; information such as Checking, Savings, or the credit card name display along with the last 4 digits of the bank account/credit card. the billing information associated with the payment method. a Manage Recurring Gifts link, if applicable; this link lets you manage your recurring giving associated with the payment method.

If you arrived to this page by clicking the Manage Payment Methods link on the Manage Scheduled Giving page, skip to step 3 to learn how to add a new payment method.

1. Point to **Home**, then click **My Account**.
2. Click the **Manage Payment Methods** tab.
3. Click **Add New Payment Method**.
4. Enter your payment information. Depending on whether you select credit card or electronic check for your payment type, the required information changes.
   - **Credit Card**:
     Enter a nickname for your account. For example, Robert's Visa Card.
     Make sure **Credit/Debit** is selected in the **Account Type** field.
     Enter your account number.
     Enter the name on the card just as it is displayed. For example, your go by John Smith, but your card displays John R Smith; you would enter John R Smith.
     Select your card expiration date from the drop-down fields.
     Enter the billing information associated with the card.
     Enter an e-mail address to associate with the credit card.
   - **Electronic Check**:
     Enter a nickname for your account. For example, Robert's Checking Account.
     Make sure **Checking** or **Savings** is selected in the **Account Type** field.
     Enter your account number and ACH routing number. For help with locating these numbers, please refer to this sample check, or contact your bank.
     Enter the name associated with the account just as it is displayed on the check. For example, your go by John Smith, but your check displays John R Smith; you would enter John R Smith. Enter the billing information associated with the card.
     Enter an e-mail address to associate with the account.
5. Click **Submit New Payment Method**.

The new payment method card displays on the Manage Payment Methods tab. This payment method is now available for use with event registration and online giving.

If you arrived to this page by clicking the Manage Payment Methods link on the Manage Scheduled Giving page, skip to step 3 to learn how to edit a payment method.

1. Point to **Home**, then click **My Account**.
2. Click the **Manage Payment Methods** tab.
3. Locate the payment method card you want to edit, then click **Edit**.
4. Make the necessary changes and click **Submit Changes**. The payment method card now displays the updated information.

If you arrived to this page by clicking the Manage Payment Methods link on the Manage Scheduled Giving page, skip to step 3 to learn how to delete a payment method.

1. Point to **Home**, then click **My Account**.
2. Click the **Manage Payment Methods** tab.
3. Located the payment method card to remove.
4. Click **Delete**, then **OK**. The payment method card no longer displays on the Manage Payment Methods tab.

Reassign Recurring Gifts

If a payment method is associated with recurring gifts, it cannot be deleted until the recurring gifts have been assigned a different payment method.

If you arrived to this page by clicking the Manage Payment Methods link on the Manage Scheduled Giving page, skip to step 2 to learn how to reassign recurring gifts so you can delete a payment method.

1. On the **Manage Payment Methods** tab, locate the payment method card with the recurring gifts you want to reassign.
2. Click the **Manage Recurring Gifts** link in the desired payment method card.
3. For each recurring gift, click , then select a new payment method from the **What Payment Method would you like to use** drop-down list.
4. Click **Update**.
5. Click the **Manage Payment Methods** link in the right corner of the tab.
6. Since the recurring gifts have been reassigned, click **Delete** to remove the payment method.

Payment Method Descriptions

When you add a payment method, you assign the method a nickname or description. This may be a name you intend to associate with the payment method for as long as you use it, or it could be something you quickly entered so you could finish making an online payment or pay for an event registration. If you need to change the description of a payment method, you can.

If you arrived to this page by clicking the Manage Payment Methods link on the Manage Scheduled Giving page, skip to step 3 to learn how to edit a payment method description.

1. Point to **Home**, then click **My Account**.
2. Click the **Manage Payment Methods** tab.
3. Locate the payment method card with the description you want to edit.
4. Click **edit** beside the description.
5. Make the necessary changes to the description.
6. Click **Update**. The payment method description is updated.

Enter Profile Information

The My Profile page lets you add, edit, or delete addresses, phone numbers, and e-mail addresses. You can also edit or delete personal information or user-defined fields. You can also view your groups and events.

Once you make changes, a change request is created. Before your changes display, an administrator must approve the change request.

1. Point to **Home**, then click **My Profile**.
2. Click the **Contact Info** or **Personal Info** sub-tab.
3. On the **Personal Information** header, click **Edit** .
4. Under **Personal Information** for **<lastname, firstname>**, enter your changes.
5. Click **Submit** at the top of the page.

Add Photos to Your Individual and Family Profiles

If you have appropriate rights, you can add photos to individual and family profiles. All photos must be in .JPG format and the maximum image size you can upload is 10 MB.

Once you add the photo, the administrator receives a change request. Before the photo displays, the administrator must approve the change request. You cannot delete approved photos.

1. Point to **Home**, then click **My Profile**.
2. At the top of the page, click **Edit**.
3. On the Change Request page, click **Personal Photo**.
4. Click **Browse**. The Choose file dialog box displays.
5. In the File Upload window, select the photo that you want to upload and click **Open**.
6. Click **Save**.

1. Point to **Home**, then click **My Complete Profile**.
2. At the top of the page, click **Edit**.
3. On the Change Request page, click **Family**.
4. At the top of the page, click **Family Picture**.
5. Click **Browse**. The Choose file dialog box displays.
6. In the File Upload window, select the photo that you want to upload and click **Open**.
7. Click **Save**.

Edit your Contact Information

The **Home** > **My Profile** tab displays the phone numbers, e-mail addresses, social media addresses, and mailing addresses the individual has entered. With appropriate rights, you can add, edit, or delete this information.

Preferred Contact Method

On this page you can set up your preferred contact type. By default, **Phone Number** is selected as the preferred method. If you do not want to be contacted by phone, you have the option to switch your preferred contact method to **E-mail** or **by Text Message**. An administrator must approve your change of preference before it changes on your profile.

1. Point to **Home**, then click **My Profile**.
2. On the **Contact Info** tab, click **Change Preference**.
3. Select how you want to be contacted, then click **Submit**.

Phone Numbers

The word **Preferred** displays beside the phone number you designated in your organization's selected emphasis color. For example, the default emphasis color is red, so beside the preferred phone number displays (Preferred). It is highly recommended you have one phone number designated as **Preferred** fo r emergencies or situations where it is imperative to contact you.

1. In the **Phone Numbers** section, click **Add**.
2. Select a **Phone Type**.
3. Enter the **Area Code** and **Number**.
4. To display the phone number in the online directory, select **Listed**.
5. If the phone can receive text messages and you want to receive them at this number, select **Allow Texting**.
6. To mark the phone number as preferred, select **Preferred**.
7. Click **Submit**.

E-mail Addresses

If you select to have a preferred e-mail address, the word **Preferred** displays beside the selected e-mail address in your organization's selected emphasis color. For example, the default emphasis color is red, so beside the preferred e-mail address displays (Preferred).

The number of e-mail address available to you depends on how many e-mail address types you have set up.

1. In the **E-mail Addresses** section, click **Add**.
2. Select the **E-mail Type** and enter the e-mail address.
3. If you want the e-mail to display in the program and directories, select **I want this e-mail listed**.
4. To mark the e-mail address as preferred, select the **This is my preferred e-mail address** option.
5. To use the specific e-mail for login purposes, select **I want to log in using this e-mail**.
6. Click **Submit**.

Social Media

You have the option to enter your personal social media information for others with appropriate rights to view. You can enter your Facebook and Twitter information in this section.

You are not required to display your social media information. If you do enter your information but do not want it visible to other members and users, clear the **Listed** check box. Doing this hides the information from members and users who do not have rights to view unlisted media.

1. In the **Social Media** section, click **Add**.
2. Select the **Link Type** and enter the address.
3. To display your social media information, select **Listed**.
4. Click **Submit**.

Addresses

If the correct address information is entered, you can view a map of the individual's address. To view a map of the address, click **View Map** beneath the address.

To view more information about the address, place your cursor over the  beside the address. An informational dialog box displays.

1. In the **Addresses** section, click **Add**.
2. Enter the necessary information. Required fields are marked with a red asterisk.
3. Click **Submit**.

1. In the **Addresses** section, click **Edit**  beside the address you want to edit.
2. Make the necessary changes. Required fields are marked with a red asterisk.
3. Click **Submit**.

Edit your Serving Information

The **Serving** tab lets you establish your availability to serve in the organization and view associated attributes.

Availability for Serving

In this section, you can set the availability for serving and enter any special information about your ability to serve.

1. In Access ACS, click **Home** > **My Profile**.
2. On the **My Profile** tab, click on the **Serving** sub-tab.
3. Select a time from the drop-down list.
4. Select the day or days you are available.
5. Enter any special notes or considerations in the **Notes** text box. For example, "Is certified in CPR."

Attributes

The **Attributes** section displays the attributes assigned to the selected individual.

1. Click **Add Attributes**.
2. On the Personal Volunteering Details page, select the attributes you want associated with the individual.
3. Click **Save**.

1. Click **Edit** beside the attribute group you want to edit.
2. Make the necessary changes on the Personal Volunteering Details page.
3. Click **Save**.

Serving Commitments

The **Serving Commitments** section displays the serving commitments for the selected individual. Current serving commitments display automatically. To view past serving commitments for the individual, click **Show History**.

The serving opportunity name, position, date and leader display in the section.

Change your E-mail Address or Password

The My Account page lets you:

- Change the e-mail address associated with your login
- Change your login password
- Set up your personal preferences
- Manage your saved payment methods

Changing my E-Mail Address

You may want to change the e-mail address you have entered in our system.

1. Point to **Home**, then click **My Account**.
2. Click the **Account Settings** tab.
3. For E-mail, click **Change**.
4. Enter your new **E-mail Address**.
5. Enter your **Password**, then click **Save**.

Changing my Password

For security purposes, you should change your password occasionally, or if someone may have found it and have access to your information.

By default, passwords must

- Be between 6-15 characters long
- Not contain a sequence of consecutive (123456) or repeated (111111) characters
- Include at least 2 letters and 2 numbers, a symbol, OR a total of at least 8 characters.

1. Point to **Home**, then click **My Account**.
2. Click the **Account Settings** tab.
3. For Password, click **Change**.
   - For help creating a strong password, click **Password Tips**.

- The Strength progress bar displayed beneath the **New Password** field indicates how weak or strong the password you entered is. If the password is weak, the progress bar displays in red; if the password is strong, the progress bar displays in green.

4. Enter your **Current Password**.
5. Enter your **New Password**.
6. In the **Confirm New Password** field, enter your new password again and click **Save**.

Social Networking

Use the Social Networking section to manage the available Facebook and Twitter accounts you can post to.

1. Point to **Home**, then click **My Account**.
2. Click the **Account Settings** tab.
3. Under **Social Networking**, click the **Add Facebook Account** link.
4. If you are not logged in to your Facebook account, the Facebook Login page displays. Enter your **Email** and **Password** to login, then let Access ACS link to your account.
   If you are already logged in to your Facebook account, select to let Access ACS link to your account.
5. Back on the Account Settings tab, your Facebook profile picture and name display in the **Social Networking** section.

View and Complete Outreach Assignments

You can view and manage outreach assignments.

1. Point to **Home**, **My Profile**, then click **My Assignments**.
2. Click a contact name.
3. On the View Individual Information page, you can:
   - View a map to get driving directions.
   - View Outreach history.
   - Print Individual Information.
4. Complete the contact.

1. Point to **Home**, **My Profile**, then click **My Assignments**.
2. To complete an assignment click a **Contact Name**.
3. Under **Contact Results**, click **Complete Contact**.
4. If necessary, edit the **Contact Date**.
5. Select a response from the **Responses** list.
6. If necessary, enter **Comments**.
7. Click **Submit** to send the completed contact to the administrator as a change request, or **Cancel** to return to the previous page.

1. Point to **Home**, **My Profile**, then click **My Assignments**.
2. Click a **Contact Name**.
3. Click **Print** to go to the Print Preview.
4. Click **Print** from the Print Preview page, or **Back** to return to the previous page.

1. Point to **Home**, **My Profile**, then click **My Assignments**.
2. Click a **Contact Name**.
3. Click **Outreach History** to view all Outreach Activity for this individual.
4. On the Outreach History page, you can:
   - View a map for driving directions.
   - Change the date range for viewing outreach activities.
   - View the individual's entire record.
   - Sort activities by clicking on a column title.
   - Print outreach activities.

Select your Ministry Interests

On the Home Page, you can select areas of ministry you're interested in. Your interests display on your profile in Access ACS.

To select your interests

1. On the Home Page, under **I'm interested in...**, click **Select Interests**.
2. Select the areas of ministry you're interested in, then click **Save**.

Manage your Event Registrations

On the Home Page, under My Registrations, you can view information about your event registrations as well as guests you have registered. In this section, you can see the event information, amount paid and amount due, and registration status. You can also print a receipt or make a payment for your event if online payments are accepted.

1. On the Home Page, under **My Registrations**, click **My Registrations** or **My Guest Registrations**.
2. Beside the registration you want to print a receipt for, click **Print Receipt**.
3. When the receipt displays, click **Print**.

1. On the Home Page, under **My Registrations**, click **My Registrations** or **My Guest Registrations**.
2. Beside the registration you want to print a receipt for, click **Make Payment**.
3. Under **Select Payment Account**, select a payment account or enter the account details. Click **Next**.

Search for Other Members

On the My Overview page, you can search for other individuals in the database.

To search for members

1. On the Home page, under **Search**, enter the individual's **Last Name** and/or **First Name/Goes By Name**.
2. Click **Search**.

After you search, the Member Search Results page displays each member's name, address (both Address Lines 1 and 2), phone number, and e-mail address.

To send an e-mail, click an individual's e-mail address.

To change to number of records that display per page, make a selection from the **Records Per Page** drop-down list.

Register for an Event

You can register yourself or others for an event without creating an account.

When you begin, enter your e-mail address. This is where you'll receive your event confirmation and any other registration e-mails. If you're registering others, you can enter their e-mail addresses to receive confirmation messages later on.

Depending on your event's registration settings, you can add additional named attendees or a number of unnamed guests as well. A check mark displays by each registrant's name.

1. Under **Sign Up**, enter your e-mail address, then click **Continue**.
2. If prompted, enter your password or click **Continue as Guest**.
3. Under **Who is attending?** select **I am register myself** or **I am registering someone else**.
   - Enter each registrant's **First Name** and **Last Name**.
   - Select the registration option in the drop-down list, then click **Add**.
   - Once you register yourself, the heading changes to **Who else is attending**.
4. **Optional:** Select any family members you want to register, the registration option, and click **Add**.
5. **Optional:** To register unnamed guests, enter the quantity. For named guests, each registrant's name displays and registration option displays

   . When finished, click **Next**.

   > ⚠ The options that display vary based on how the church sets up the event.

6. For each registrant, select options, add additional supplies, and complete the request for information, then click **Next**. These options only display if your event registration coordinator has set them up.
7. If prompted, under **Add a contact for this registration**, enter your contact information in case the church needs to contact you regarding the event.
8. To contact additional registrants or individuals, under **Choose contact e-mails for this registration**, click **Add Another E-mail**. Then, enter the e-mail address and click **Add**.
9. When finished, click **Next**.
10. Under **Select Payment Amount**, select **Pay Total Amount**, **Pay Minimum Payment**, or **Enter an Amount**, then click **Next**.
11. Under **Summary**, review the information. If everything looks good, click **Next**. If you need to make changes, click **Back**.
12. Under **Select Payment Method**, select **Pay in Person / by Mail** or **Pay Online**. • If paying in person or by mail, enter a **Memo** (optional), then click **Next**. If paying online, enter your payment information, then click **Next**.

When the confirmation message displays, you have successfully registered for the event. To print the information now, click **Print Confirmation**. If you don't have access to a printer or don't want to print right now, the confirmation is e-mailed to all contacts selected or added for the registration.

Adding Registration Contacts

If you're registering as a guest, you are prompted to add your first and last name as a contact for the event. You may also be required to enter your address and phone number. The church needs this information in case they need to contact you about the event.

When adding additional e-mails for the registration, you can enter as many e-mail addresses as you'd like. The e-mail address entered when you begin registering displays by default and cannot be cleared or changed.

Register for an Event inside Access ACS

The Event Registration Expert takes you through each step of registering for an event using the online registration form.

The options that display when registering for an event depend on your organization's settings.

1. On the My Overview page, in the **I Want to View** section, click **Available Registrations** . The Upcoming Events page displays.
2. If necessary, select the **Month**, **Campus**, and **Department** to find your event, then click **Register**.
3. Select the attendees to register and click **Next**. You can register yourself for the event, or, if the option is available, family members or guests.
4. **Optional:** On the Options page, locate the name of the family member you want to register for an additional event or option. Select a pricing level next to the option and click **Next** . Repeat this process for each registrant.
5. **Optional:** Select the registrant you want to order supplies for, enter the quantity that you want, then click **Next**.
6. **Optional:** On the Request for Information page, answer any required event questions for each registrant, then click **Next**.
7. Under **Choose contact e-mails for this registration**, select any additional e-mails to receive confirmation details.
    - To add another contact, click **Add Another E-Mail**.
    - Enter that contact's e-mail address, then click **Add** .
    - When you finish adding contacts, click **Next** .
8. The Summary page displays the names of all registrants, t otal number of individuals you registered, e vent name, event subtotal , amount due to complete registration, g rand total, and amount due today. Confirm this information, then click **Next**.
9. If the event has costs associated with it, the Select Payment Method page displays. Depending on the organization's selections, you can pay for events using a credit card, debit card, or electronic check. Select your payment method, then click **Next**.
10. When the confirmation page displays, the registration process is complete.
    - You will receive a confirmation e-mail, or you can click **Print Confirmation** to print your confirmation information.
    - If the event organizer provided any forms or documents for the event, they also display on this page. To download a file, click the name of the file.

Registration Tips

- If an event is sold out, the **Add** option to register additional individuals, does not display. The **Registration** drop-down list is also grayed out for individuals not registered for the event.
- If no cost associated with the event, the word **Free** displays beside the event name in the **Registration** drop-down list.
- The **Total Cost** you have incurred for the event displays in the top-left-hand corner of the page.
- By default, the event image, description, and details display when selecting attendees. This is helpful because you can see registration guidelines, such as ages or requirements, which helps prevent adults from registering children from adult-only events. To hide the details, click **Hi de Details**.
- You can edit personal information on the Register Attendees page. A change request is created when you edit contact information, and an administrator must approve the change request before any of the changes made are permanently applied to the record.
- When adding contact e-mails for a registration, you can enter as many e-mail addresses as you'd like. The e-mail address entered when you begin registering displays by default and cannot be cleared or changed.

Event Registration Options

When registering for an event, several options may display if your organization has them selected.

You can register yourself, family members or guests (if the options are available) for the event. You can register others for the event without registering yourself.

Depending on how the event was set up, you may have the option to select different registration periods, or be required to pay a deposit amount.

1. Under **Register Additional Individuals/Family**, click **Add**.
2. Enter the necessary information in the available fields, then click **Add**.

1. Under **Register Individuals (No Name Required)**, enter the total number of individuals without names you want to register in the **Quanti ty** text box.
2. Select the **Registration** type, then click **Add**.

> You cannot make individual event options selections or purchase individual supplies for registrants without names. Once you register individuals without using names, the option becomes unavailable. You can still register individuals with names.

Options include smaller sessions that occur during a larger event.

For example, you register for a weekend retreat. During the retreat, your organization plans to offer several classes for participants. When you register, you can sign up for the options you want to attend.

Supplies, such as study guides, may be available. If the event and sub-events you register for offer additional supplies, you can order them in event registration. If an image of the supply is available, click the picture to view the supply.

Your organization may request additional information when you register. Required questions are indicated by a red asterisk (*). Depending on the events you register yourself or others for, the questions differ.

If you register for an event and later decide you want to attend an additional event or add supplies, you can edit your registration without canceling the previous registration and re-entering information.

Payment amounts and methods depend on the organization's selections. When paying for an event, you can pay the total amount or make a minimum payment (deposit). You can pay for events using a credit card, debit card, or electronic check. Or, you may be able to pay in person or by mail.

- To pay directly or mail in a payment, select **Pay in Person/by Mail**.
- To pay using a credit card, debit card, or electronic check, select **Pay Online**. Then, enter your payment information.

After you select your payment method, the Payment Confirmation page displays.

On the confirmation page, you can share the event on Facebook to let others know you registered.

To post about the event on your Facebook wall, click **Recommend**. You can enter a personalized message about the event, then click **Post to Facebook**. To send a message about the event to select groups, individuals, or e-mail addresses, click **Send**.

Edit Contact Information

During the Event Registration process, you can edit the contact information entered for yourself, or if you have appropriate rights, family members registered for the event or sub-event.

1. On the **My Overview** page, in the **I Want to View** section, click **Available Registrations**.
2. Click **Register** for the desired event.
3. Click **edit** beside the your name or the family member you want to make changes to.
4. In the Update Contact Information dialog box, click **edit** next to the information you want to update.
5. After you have made the necessary updates, click **Update**.

1. Point to **Events**, then click **Events Setup**.
2. Click the **Seats Sold** number for the appropriate event.
3. Click the your name.
4. Click **edit** beside your name or the name of the family member you want to make changes to.
5. In the Update Contact Information dialog box, click **edit** next to the information you want to update.
6. After you have made the necessary updates, click **Update**.

Cancel an Event Registration

After you register for an event, you can cancel your registration on the My Overview page. When you cancel your registration, your sub-event registrations for that event are also canceled.

If you paid for the event, your administrator must process your refund.

To cancel your registration for an event

1. Point to **Home**, then click **My Overview**.
2. In the **My Registrations** section, click **Cancel**, then click **OK** to confirm.
3. The status changes to one of the following:
   - **Balance Due** - Displays if any money is owed.
   - **Paid in Full** - Displays if there is no owed for the event registration.
   - **Refund Due** - Displays if a refund is due.
   - **Ineligible for Refund** - Displays if the refund date is past the refund deadline date.
   - **Partially Refunded** - Displays if only a part of the refund has been made.
   - **Refunded** - Displays when the refund process is complete.

Print Individual or Family Directories

Members and attendees can print both individual and family directories in Access ACS.

Printing Family Directories

You can print a family directory or a family pictorial directory. You must have rights to photos to view pictorial directories.

1. From the list of individuals, select the families you want to include in the directory. To print the family directory for all search results, select the check box next to the **Name** column.
2. In the **I want to** drop-down list, select **Print Directory**.
3. Click **Go**.
4. On the Directories page, select **Print a Family Directory**.
5. Click **View Directory**.
6. On the preview page, click **Print**.

Printing Individual Directories

You can print an individual directory or an individual pictorial directory by selecting the individuals from group rosters. You must have rights to photos to view pictorial directories.

1. Select the individuals you want to include in the individual directory. To include all individuals, select the check box next to the **Name** column.
2. In the **I want to** drop-down list, select **Print Directory**, then click **Go**.
3. On the Directories page, select **Print an Individual Directory**.
4. Click **View Directory**.
5. On the preview page, click **Print**.

View Access ACS Groups

Depending on the organization's Access ACS settings, members and attendees can sign up for activities, classes, or small groups in the Groups area.

Members can also export rosters to Excel, e-mail group members, print a group directory, or print group mailing labels.

Join an Activity, Class, or Group

You can send a request to join a new activity, class, or small group.

To sign up for an activity

1. Point to **Groups**, then click **My Groups**.
2. Under **My Groups**, click **Available Activities**, **Available Classes, or Available Small Groups**.
3. Select the group you want to join, then click **Request to Join**.

> **Info**
>
> If your administrator displays the contact person for available activities, the contact person's name displays below the activity name and activity description.
>
> If the contact person provides an e-mail address, click the name to send the contact person an e-mail.

Send a Message to Group Members

You can send an e-mail to activity, group, or class members.

If you use this method, there is less of a chance of your e-mail address being marked as spam and banned from sending messages.

If any of the selected individuals do not have e-mail addresses, their names display on the Compose Message page in the **People without e-mail addresses** section. The number of individuals that have e-mail addresses displays at the top of the page. To view the specific e-mail addresses, click **Peo ple with e-mail addresses**.

To send a group e-mail

1. Point to **Groups**, then click **My Groups**.
2. In the **I want to drop-down** list beside the activity, group, or class you want to e-mail, select **Send a Message**.
3. Click **Go**.
4. To change the **Reply-To e-mail** address, click **change**, enter a new e-mail address and click **update**. By default, your preferred e-mail address displays as the Reply-to e-mail address.

5. Enter other e-mail addresses in the **Additional e-mail addresses** field. These e-mail addresses also receive e-mail responses in addition to the **R eply-to** e-mail. Separate e-mail addresses with a comma. For example, *jillthompson@example.com, bfrank@example.com*.
6. Enter a **Subject** and message. Use the toolbar to format your message.
7. Once you are satisfied with your message, click **Send Message**.

After sending a message, the Message Results page displays. On this page the total number of people who received your message displays along with the individuals who did not.

The individuals without e-mail addresses display in the bottom half of the page. To e-mail yourself the list of individuals without e-mail addresses, click **Email This Info To Me**. To print mailing labels for the individuals, click **Print Labels**.

Print Group Directories and Mailing Labels

You can view and print a directory of activity, group, or class members. You can also print mailing labels for group members.

1. Point to **Groups**, then click **My Groups**.
2. In the **I want to drop-down** list beside the activity, group, or class you want to print a directory for, select **Print Directory**.
3. Click **Go**.
4. Click **View an Individual Directory**, **View a Family Directory**, **View an Individual Directory with photos**, or **View a Family Directory with photos**.
5. When the directory displays, click **Print**.

Export Group Rosters to Excel

You can export an activity, group, or class roster as a comma delimited (.CSV) file. This format lets you open the file in any application that supports CSV files.

The .CSV file contains the **Individual name (last, first)**, **Primary e-mail address** (if available), **Category**, **Phone number**, **Elements 1-4**.

To export rosters

1. Point to **Groups**, then click **My Groups**.
2. In the **Action** drop-down list beside the activity, group or class you want to export, select **Export to Excel**.
3. Click **Go**.
4. Under **Export to Excel**, select the fields you want to include in the export, then click **Export**.

View Calendar Events

On the Calendars page in Access ACS, members and attendees can view events and print a calendar of events. Only events that Access ACS administrators published display.

To view the calendar

1. Click **Events** > **Calendar**.
2. Under **Calendars**, select which calendars to view, then click **Go**.
3. Use the **Month**, **Week**, **Day**, and **List** buttons to customize the calendar's display. You can also navigate to previous or future months.
4. To view more information about an event, click the event's name in the calendar, then click **View More Details**.
5. To print the calendar, click **Print**.

Giving for Members and Attendees

In Access ACS, you can make contributions online and view your contribution summary for the current year.

Online giving contributions do not display in Access ACS until they are recorded by your organization. After you enter gift information, you must enter your online payment information.

Depending on your organization's selections, you can give using a credit card, debit card, or electronic check. To use online giving, your organization must sign up for it.

You can access online giving from your profile or the My Contributions page. You cannot make online contributions for other users. You can only view the Online Giving page on your profile.

The **Contribution Pledge Summary** section displays your contributions summary for the current year. The list provides the name of the funds to which you have contributed, the year-to-date amount that you gave to each fund, the total amount you pledged to each fund, the amounts you contributed to the funds in previous years, and the pledge balance for each fund. Multi-year pledges are indicated by an asterisk in the **Total Pledge** column. If your contributions information is not available, this section does not display.

Enter a One-Time Online Gift

Members, attendees, and organizations can enter online gifts.

The Give Now page is divided into two tabs:

- **Give Now** - Displays a summary of your pledged giving. Gifts made to a fund that does not have a pledge do not display in the giving summary.
- **My Scheduled Giving** - If your organization set up recurring gifts, this tab is visible. On this tab you can edit or deactivate recurring gifts without having to go through all of your contributions.

To enter a one time gift

1. Point to **Giving**, then click **Give Now**.
2. Enter how much you want to give. For example, **$50.00**.
3. Select the **One Time** option.
4. Enter when you want the gift to start. To select the date from a calendar, click .
5. Click **Continue**.
6. Enter the amount to give to each fund. You must allocate your total contribution to the funds on the page. You can apply the entirety of the gift to one fund or divide the gift up among several funds.
    - Your total gift amount displays below the funds as **$<amount> of $<amount> Remaining**.
    - You can enter an **Optional Description** for each fund you give to.
7. Click **Continue**.
8. Select your payment method.
9. Click **Continue**.
10. Make sure the payment information and amount, funds you want to give to, and gift descriptions are correct, then click **Process Gift**. If you are scheduling a gift to be processed at a future date, click **Schedule Gift**.
11. The **Receipt** page displays.To print the receipt information, click **Print** on the right side of the page.

Enter a Recurring Online Gift

Members, attendees, and organizations can enter recurring online gifts.

The **Give Now** tab displays a summary of your giving and lets you enter new contributions. The **My Scheduled Giving** page lets you edit or delete recurring gifts without having to go through all of your contributions.

1. Point to **Giving**, then click **Give Now**.
2. Enter how much you want to give. For example, **$50.00**.
3. Select the **Recurring** option.
4. Select the recurrence pattern you want to use, the day of the week you want to give on, and the dates you want to start and stop the gift. To select dates from a calendar, click .
    - **Weekly** – Select this option to give the gift every week on the same day. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments.
    - **Monthly** – Select this option to give the gift every month on the same day. Enter a Start Date for your gift, then select and enter an
    - End Date or Number of Payments.
    - **Every 2 Weeks** – Select this option to give the gift every two weeks on the same day. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments.
    - **Twice a Month** – Select this option to give the gift twice a month on two dates you specify. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments. The default 1st Payment and 2nd Payment dates are the 1st and the 16th. The gift is transacted on the first available date; if you enter the 5th and the 25th for the dates but it is the 10th, then the gift will not be transacted until the 25th.

- **Every 3 Months** – Select this option to give the gift every three months on the same day. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments.

5. Click **Continue.**
6. Enter the amount to give to each fund. You must allocate your total contribution to the funds on the page. You can apply the entirety of the gift to one fund or divide the gift up among several funds.
7. Click **Continue**.
8. Select your payment method.
9. Click **Continue**.
10. Make sure the payment information and amount, funds you want to give to, and gift descriptions are correct, then click **Process Gift**. If you are scheduling a gift to be processed at a future date, click **Schedule Gift**.
11. The **Receipt** page displays. To print the receipt information, click **Print** on the right side of the page.

Useful Information

If you set up recurring giving to stop on a day that falls within the scheduled frequency, the donation is still transacted.

For example, if a recurring gift is set to end on the 30th of the month, the gift is made on the 30th even though it is the final day of the scheduled frequency.

What if I give a gift and it is not accepted?

If your gift is denied, you will receive an e-mail explaining why your gift was not accepted.

What if I set up my gift for the end of the month?

If you set up recurring giving to occur on the 28th, 29th, 30th, or 31st of the month, the following rules apply:

Date	When Transaction Occurs
28th	On the 28th day of the month
29th	On the 29th day of the month, unless February or a leap year
30th	On the 30th of the month unless it is February.
31st	On the 31st of the month, or the last day of the month if it does not have 31 days.

View My Scheduled Giving

If your organization set up recurring gifts, the My Scheduled Giving tab displays. On this tab, you can view the date and amount of your next schedule contributions, update your credit and debit card information, and edit or deactivate recurring gifts without having to go through all of your contributions.

Your inactive giving schedules also display on this page, along with important information regarding them. To reactivate a giving schedule, click under **Actions**.

1. Click **Giving** > **My Scheduled Giving**.
2. Click **Add New Gift**.
3. Under **New Gift Details**, enter the amount to give, select a fund, and enter an option memo, if applicable. The information you enter in the **Optional Memo** field displays on the e-mail receipt.
4. Select a giving **Frequency** and the date you want your scheduled gift to begin.
5. Under **Payment Details**, enter your payment information. You can give via credit or debit card, checking account, or savings account.
6. Click **Schedule Gift**.

1. Click **Update Account**.
2. Make the appropriate changes to the card information.
3. Click **Submit Payment**.

1. Find the contribution you want to edit.
2. Under **Actions**, click .
3. Edit the amount, optional memo, and other details such as the gift date, start date, and account.
4. Click **Schedule Gift**.

View My Giving History

The **My Giving History** tab displays your contribution history for a selected year. To make a contribution, click **Give Online**.

To view your contributions

1. Point to **Giving**, then click **My Giving History**.
2. Locate the **Contribution Information** section.
3. To view your ten most recent contributions, click **10 Most Recent Contributions**.
4. To view all of your contributions, click **Show All**.
5. To view only contributions made in a specific date range, click **During Date Range**. Enter the Start Date and End Date, then click **Go**.

> **Note**
>
> Recent online contributions may not appear until the transaction is posted to your church's financial records.

View My Pledge History

The **My Pledge History** tab displays your pledge information for the current and past year. Your member picture, personal information, and family information displays across the top of the tab.

- To edit your personal information, click **Edit personal information**.
- To add a new family member to your record, click **Add new family member**.
- To view your family information, click **View family information**.

Pledges Pending Approval displays pledges you've entered that are saved. The pledge's amount, frequency, start and stop date, and total pledged amount display.

If you need to change a pledge, you can do that from this window. This generates an e-mail to the pledge administrator.

To view pledge history

1. Point to **Giving**, then click **My Giving History**.
2. Click the **My Pledge History** tab.
3. The total of your pledges given in the selected year displays after **Total Given to Pledges in <year>**. If any money is required to meet your established pledge goal, the amount displays under **Balance**.
4. Your progress toward meeting your pledge displays as well. If a pledge is forgiven, the word **Forgiven** displays instead of the progress bar, and the balance is $0.00.
    - To enter a pledge, click **Add Pledge**.
    - To make a contribution from the My Pledge History page, click **Give Online**.
    - To change the year you are viewing pledges for, click the **Pledge Summary** for drop-down list.

Add a Pledge

On the **My Pledge History** tab, you can add pledges for any amount and to any fund enabled for Online Giving.

You cannot add a pledge if you already have one for that selected fund and date range. The Pledges Pending Approval grid displays on the **My Pledge History** tab, so you can see which pledges you have added, along with the amount, frequency, date range, and total pledge amount.

1. Point to **Giving**, then click **My Giving History**.
2. Click the **My Pledge History** tab.
3. Click **Add Pledge**.
4. Enter the pledge's amount.
5. In the drop-down lists, select the pledge's **fund** and **frequency**. Various pledge frequencies are available.
6. In the drop-down lists, select the pledge's date range. After you enter the pledge, the total pledge amount displays.
7. Click **Save**.

> Once you add a pledge, you cannot edit it online.
>
> If you need to make changes to a pledge, on the **My Pledge History** tab, under **Pledges Pending Approval**, click the link to e-mail the pledge administrator to edit the pledge.

If your organization uses ACS Pay Plus and has recurring gifts enabled, you can save a pledge and set up a recurring gift.

1. Point to **Giving**, then click **My Giving History**.
2. Click the **My Pledge History** tab.
3. Click **Add Pledge**.
4. Enter the pledge's amount.
5. In the drop-down lists, select the pledge's **fund** and **frequency**.
6. In the drop-down lists, select the pledge's date range. After you enter the pledge, the total pledge amount displays.
7. Click **Save and Setup Online Gift**. The My Scheduled Giving tab displays.
8. Under **New Gift Details**, verify your gift details. You can adjust the payment schedule or add an optional memo. These changes only affect your scheduled gift, and no adjustments are made to the original pledge. You may also add additional non-pledge gifts.
9. Under **Payment Details**, select the payment method you want to use for the recurring gift. You can also add a new payment method here.
10. Click **Schedule Gift**.

When finished, a confirmation that displays the recurring gift's amount, frequency, account, first payment, and last payment displays. In addition, you will receive a receipt via email.

Update Credit Card Information

If you use a credit card to give, you may need to change your credit card information in Access ACS when your credit card expires or you receive a new card.

To update your credit card information

1. Point to **Home**, then click **My Account**.
2. Click the **Manage Payment Methods** tab.
3. Locate the credit card you want to edit, then click **Edit**.
4. Make the necessary changes, then click **Submit Changes**.
5. To view all recurring gifts for the credit card, click the **Manage Recurring Gifts** link.
6. To reactivate scheduled giving, locate the **Giving Schedules - On Hold** section. In the **Actions** column, click **Activate** for each inactive schedule.

Manage Payment Methods

Managing your payment methods is an integral part of the giving online process. You can delete a card that is about to expire, add a new card, edit an incorrect payment method, or update your payment description.

1. Point to **Giving**, then click **Manage Scheduled Giving**.
2. Click **Manage Payment Methods** on the right side of the page.
3. Click **Add Payment Method**.
4. Enter the new payment method information.
5. Click **Submit Changes**.

1. Point to **Giving**, then click **Manage Scheduled Giving**.
2. Click **Manage Payment Methods** on the right side of the page.
3. Click **Edit** for the desired method payment.
4. Make the necessary changes to the payment method.
5. Click **Submit Changes**.

Manage Recurring Gifts displays at the bottom of each payment method associated with recurring gifts. The total number of gifts associated with the payment method displays also.

To review and manage the recurring gifts, click **Manage Recurring Gifts**.

Print a Tax Statement

On the My Contributions page, you can view and print a plain paper tax statement. Your administrator must upload tax statements before they are available in Access ACS.

To print a tax statement

1. Point to **Home**, then click **My Profile**.
2. Click the **My Giving History** tab.
3. Click **PDF Tax Statement**.
4. Review the tax statement.

5.Click **Print**.

Edit an Event Registration

You can make changes to your event registration. This is helpful if you want to order additional supplies or add additional e-mail contacts to a registration.

Editing Registrations Inside Access ACS

If you have a login, you can edit event registrations from the dashboard.

1. On the My Overview page, under **My Registrations**, click on the registration you want to edit.

   > If you are registered, the registration displays on the **My Registrations** tab. If you registered a guest, such as a child's VBS registration, the registration displays on the **My Guest Registrations** tab.

2. On the **Registration Details** tab, click **Register**.
3. The event's details and registration options display. Make any necessary changes to your registration, then click **Next**.
4. When you finish, **Your registration is complete.** displays. To print a receipt that includes your updated event information, click **Print Confirmation**.

Editing Registrations from the Event Page

You can also edit your event registration from the event page.

If you're a registered user and choose to edit a registration with a confirmation number, you can only view existing registrations, add supplies, answer questions, and add sub-events. You must sign in to view unregistered family members, contact information, or add additional guests.

If you don't have a login, you can view, edit, and cancel those already registered, but cannot add additional registrations.

1. On the event registration page, under **Sign Up**, enter the e-mail address you registered with and click **Continue**.
2. If you have a login, you can choose to sign in or edit your event registration with a confirmation number. To sign in, under **We know you!**, enter your password and click **Sign In**. If you've forgotten your password, click **Forgot your password?** to reset it.
3. If you don't have a login or choose to continue without signing in, enter any **Confirmation Number** from your event registration receipt, then click **Continue**. If you've lost your receipt, click **Resend my confirmation** to receive a receipt by e-mail.
4. Make any necessary changes to your registration, then click **Next**.
5. When you finish, **Your registration is complete.** displays. To print a receipt that includes your updated event information, click **Print Confirmation**.