



## Access ACS Administrators Guide



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# Welcome to Access ACS and PDSConnects!

Access ACS is an online companion to ACS People Suite, and PDSConnects is an online companion to PDS Church Office. These are useful tools for church staff, group leaders, members, and visitors.

Access ACS and PDSConnects are one in the same. The tool is branded for your product, so it may look different, but the functions are exactly the same. Throughout this guide, the name "Access ACS" refers to both.

With Access ACS, you can:

- Allow members and visitors to register and pay for events online.
- Look up or update scheduled contacts while outside the office.
- Screen and schedule volunteers for church events.
- Connect members and attendees with ministry opportunities.
- View specific church calendars and request rooms and equipment.
- Review all data changes before approving and syncing with ACS People.

Church Life, a free app from ACS Technologies, integrates with Access ACS so you can view individual and organization data, check calendar events, and map visits.

This guide outlines the information administrators need to set up and use Access ACS.

If you're new to Access ACS, be sure to read the Access ACS Getting Started Guide first. This lists step-by-step procedures for signing up, setting up, and implementing Access ACS.

For help getting church members connected to Access ACS, see our Access ACS Launch Tips.

You can also search the guide to find specific information on each area of Access ACS.

Whether you're implementing Access ACS at your church or a long-time administrator with questions, we're here for you.

ACS Support is available Monday through Thursday from 9:00 a.m. to 8:00 p.m. ET and Friday from 9:00 a.m. to 6:00 p.m. ET. You can contact ACS Support by telephone at **1-800-669-2509**.

We also offer formal classroom training for Access ACS, as well as live webinars, local user groups, and the annual Ideas to Impact Conference. Visit our **Training Website** to learn more about our training and implementation solutions.



# Getting Started

We're glad you've started using Access ACS!

As an administrator, you must complete these steps to set up Access ACS.

## Before You Begin

The first step is to sign up for and sign into Access ACS. Then, you can upload records from ACS to Access ACS.

- Sign up for Access ACS.
- Sign in to Access ACS.
- Upload your ACS records to Access ACS.

Are you a new ACS or HeadMaster OnDemand Customer?

You may already have an Access ACS account even if you are waiting for your data to be converted. Check your email for your login information or contact Support.

## Setting Up Global Preferences

Next, it's time to set up global preferences, such as personal and community calendars, if you want to use them. You can also set up the administrator email address, which receives e-mails when users within your organization report problems. Next, set up your online directory preferences, including the information that displays in online directories.

- Select your calendar preference.
- Assign the administrator e-mail address.
- Select your default Online Directory and Member Search Preferences.

## Setting Up Access ACS

Now, you can set up leadership positions, user profiles and users, group names, groups, small groups, and small group categories. You can also set up calendar locations and types, if you are using the built-in Access ACS calendar.


If you use online giving, this is the time to set that up, as well as setting up your merchant account.

- Set up your Leadership Positions.
- If you selected the Access ACS built-in calendar, set up your Calendar Locations and Types.
- Upload your ACS records to Access ACS.
- Set up your user profiles and users.
- Set up the small group structure.
- Set up group names.
- Create special groups.
- Set up Small Group leaders, categories, and positions.
- Set up Change Request Preferences.
- Set up a Member Login link on your church's website.
- Set up Online Giving. *Optional*
- Set up your merchant account. *Only needed if you select to use Online Giving or Event Registration.*

## Sign Up

To sign up for Access ACS, you must be working on a computer with ACS People Suite installed.

**To sign up for Access ACS:**

1. Log into ACS People Suite.
2. Under Advanced Tools, click on the **Admin Utilities** tab.
3. In the drop-down list, select **Sync with Access ACS**, and click **Go** .

4. In the Access ACS Activation window, select **I accept the Terms of Use**.
5. Click **Continue**.
6. Complete the **Access ACS Registration** form, and click **Finish**.
7. When the confirmation message displays, click **OK**.
8. Check your email for sign in information.

#### Important Information

- If you receive a security warning asking if you want to install **Signup.ocx**, click **Install**. You must install this file to continue with the sign up process. It does not harm your computer or any software.
- Access ACS is an additional service for Desktop customers, but it is automatically included with all ACS OnDemand subscriptions at no additional monthly cost. [Learn more about pricing](#).

When you receive the email, you can sign into Access ACS for the first time.

## What if I don't receive an email after signing up?

There are a few reasons this might happen:

Cause	Solution
The ACS mail server could be experiencing issues.	ACS Technologies' IT department is notified as soon as a server experiences issues and work to have servers operational as soon as possible.
There could be a time delay in receiving emails.	It could take a few minutes from the end of the sign up process to receive an email in your inbox.
Someone has altered the user name "admin".	Contact Access ACS Support to correct this issue.
You are entering the site number with the leading alpha character (For example, w111111).	Use only the numerals when entering the site number (For example, 11111).

## Sign into Access ACS

1. In your Web browser, go to <https://secure.accessacs.com>.
2. Enter your e-mail address and the password assigned in the welcome e-mail. You can also log in with your Site Number, User Name, and Password from the e-mail.
3. When prompted, change your password after logging in.

Access ACS provides a URL and a Site Number that are specific to your organization on the Member Login page.

1. Open your ACS for Windows software.
2. On the **Help** menu, click **About**. You will see your site number.
3. If you cannot access your software, your primary contact or site administrator may have your site number.
4. If you don't have access to your software or your site administrator, call Support at 1-800-669-2509, and we'll help.

## Log in Any Time

After successfully signing in for the first time, you can sign in to Access ACS at any time.

1. Go to <http://my.accessacs.com>.
2. Enter your organization's **Site Number**.
3. Enter your e-mail address associated with Access ACS and password. To sign in using your site number, user name, and password, click **Sign in with User Name**.
4. Click **Sign In**.
5. To have the program automatically display your user name when you go to access your page, select **Remember me**. This option does not store or auto-fill the **Password** field.

**Problems Signing In?**

- Have you signed up for Access ACS yet?
- Is your site number correct?
- Is your user name and password correct? (On the Sign In page, click Forgot your Password to have your password sent to you.)

Contact your administrator if you are still unable to sign in.

**Your next step is to Upload ACS People Records.**

# Update Information from ACS People Suite

Access ACS lets members connect to your ACS People Suite through the Internet, and you select the information you want your members to be able to view.

You can select to send individual information only (names, addresses, e-mails, phone, contributions), or include additional information such as classes and activities.

Members can only view information or create change requests, and administrators decide if the changes are accepted or declined.

## Updating Information Between Applications

Keeping information up-to-date is a vital aspect of managing any organization. You don't want meeting notices to go to the wrong e-mail address or miss sending a new member an invitation to a class because information hasn't been updated.

How do you keep your Access ACS and ACS People Suite programs up to date? Here are three processes to help you.

Always process information in this order:

- Applying Change Requests
- Uploading Records
- Maintaining Small Groups

## Change Requests

The Change Request process in ACS People Suite lets you apply changes made by your members.

A change request is created when a user adds or changes information within Access ACS, such as an e-mail address, attendance, or new individuals.

A user with the appropriate rights must approve and apply the changes before the changes display. Administrators should complete Change Requests before uploading. This way, you upload the most up-to-date and accurate information between your applications.

## Uploading

The Upload process brings the information from your ACS People records into your Access ACS records. You can specify the information you want to provide to your members. The information uploaded to Access ACS is based on your selections. Access ACS reflects the information from the last upload performed.

If you make frequent changes or have issues timing uploads within your organization, you can schedule uploads. Scheduled uploads use the upload options you selected for the previous upload.

To learn more about scheduling uploads, see [Uploading Your ACS Records](#).

## Small Groups

The Small Groups process in ACS People lets you update small group information from Access ACS. You can search, report, and mark attendance for Small Groups in the ACS People Suite.

Unlike classes and activities, the structure of small groups are created and maintained inside of Access ACS. To update Small Groups, click **Maintain** or **Update** on the Group Setup page in the ACS People Suite.

# Administrative Overview Page

The Administrative Overview page displays when anyone with administrative rights signs in. It's a convenient place for system administrators and staff members to view information about their organization. Certain staff members may be restricted by what they can readily view on this page.

To view the Administrative Overview page, point to **Admin**, then click **Admin Overview**.

## Administrative Overview Sections

- **User Summary** – Displays the number of logins and profiles within your organization. You can also add users and add or edit user profile permissions.
- **Groups Summary** – Displays the number of groups you have for each group type (Activities, Classes, Small Groups, and Special Groups). Under Options, you can set up groups, activities, and classes.
- **Giving Summary** – Displays the amount your organization has raised. You can also view the Online Giving Report and Bank Deposit Report, or set up online giving.
- **New Change Requests** – Displays new change requests by request type. You can review and approve change requests inside ACS People Suite.
- **Administrator News** – Displays any administrator news and a link to the Access ACS Administrator's Guide.
- **Organization Information** – Displays your organization's name and contact information.

# Set up Online Giving

## ACS Pay Plus



ACS Technologies has partnered with Vanco Payment Solutions to process all contributions as your merchant account in ACS Pay Plus. As a PCI Level 1 Compliant Service Provider, we feel that your privacy is protected with Vanco. For more information, please read their security and privacy policies. For more information about the benefits of online giving, visit our website.

### Features

Members and guests can give gifts and pay for event registration online. Administrators can:

- Set up recurring or one-time gifts
- Accept ACH, all major credit cards, and debit cards
- Create an unlimited number of funds
- Enable mobile giving for contributors
- Easily import online contributions to post in your ACS database

### Fees

When accepting online payments, your church incurs transaction fees from Vanco Payment Solutions and ACS Technologies.

**Questions about fees?** Our eGiving Coaches are happy to help.

To schedule a call with a coach, visit <https://giving.acstechnologies.com/lets-talk> or email [giving@acst.com](mailto:giving@acst.com).

## New User Checklist

With ACS Pay Plus, your members can make contributions with credit cards or electronic checks online through Access ACS. To get started, you must have active ACS People Suite, ACS Contributions, and Access ACS accounts.

### Online Giving Checklist

Follow this checklist to guide you to a successful implementation with ACS Pay Plus:

- Form an Online Giving team or committee
- Set a date to start using ACS Pay Plus
- Upload Records in ACS People Suite
- Sign up for a Merchant Account in Access ACS
- Enable Online Giving
- Set up Online Giving
- Locate the Online Giving Links

### Get the Word Out

Now it's time to let your congregation know about the new ways to support your church.

### eGiving Coaches

Need resources to promote online giving? Schedule a call with an eGiving Coach discuss your ministries' needs and receive a free eGiving launch kit.

## Configure Internet Settings for ACS Pay Plus

This page is currently set to Support Use Only. As of April 2017, Access ACS Clients are no longer required to use Internet Explorer.

Make sure you have the most recent version of Internet Explorer browser installed. Once installed, you must configure your .Net and ActiveX controls.

To prevent error messages, configure your the security settings in Internet Explorer 11 (IE 11).

**To change your IE11 security settings**

1. Open Internet Explorer.
2. In the **Tools** menu, select **Internet Options**.
3. On the **Security** tab, click the **Custom level** button.
4. Under **.NET Framework-reliant components**, select **Enable or Prompt**.
5. Under **ActiveX controls and plug-ins**, select **Enable or Prompt** for each option.
6. Click **OK**, and then click **OK** again.

If you select **Prompt** for any of the options above, a dialog box will display before any .Net or ActiveX file is downloaded. It is a "prompt" asking if it is okay to download.

If these security settings are not properly configured, errors display when Access ACS tries to download OLE Control Extension (OCX) files. OCX files, which are necessary for Access ACS to function correctly.

Next, it's time to **Sign up for a Merchant Account in Access ACS**.

## Sign up for a Merchant Account in Access ACS

To use ACS Pay Plus, you must sign up for a merchant account with Vanco Payment Solutions. A merchant account allows your organization to accept payments online by debit cards, credit cards, or ACH transactions. The entire application process takes 3 to 5 business days.

You can submit an application to Vanco Payment Solutions within Access ACS.

**Already have a Vanco account?** Email your Vanco client ID to [giving@acst.com](mailto:giving@acst.com) and request a merchant account for ACS Pay Plus.

1. Log into Access ACS.
2. Point to **Admin**, then click **Merchant Account Profile**.
3. Click **Get Started**.

When Vanco's application opens, complete the required fields, then submit the application. Vanco will approve your application within five business days.

When your merchant account is live, you will receive an e-mail from Access ACS confirming that ACS Pay Plus is active.

Once your ACS Pay Plus account is active, you can **Enable Online Giving** .

## Canadian eGiving

We've partnered with Vanco Payment Solutions to introduce online and mobile giving, as well as the ability to accept event payments, for our Canadian clients.

## Signing Up

Before your church can use ACS Pay Plus, you'll need to apply for an account through Vanco Payment Solutions. This process can take several weeks, so it's best to apply as soon as possible.

To apply, you'll need:

- Your church's Business Number
- The Authorized Signer's Social Insurance Number
- A voided check and the first page of a recent bank statement
- Your most recent three Processing Statements, if your church has processed credit cards in the past year
- A completed copy of Form W-8BEN-E

## Supported Payment Methods

ACS Pay Plus supports the following payment methods.

- Visa based BIN (First number is a 4)
- MasterCard based BIN (First number is a 5)

ACH, American Express, Debit, and Discover cards are not accepted.

## Deposit Timeline

Our processing times for Canadian clients are listed below:

Process Day (by 4:00 PM)	Deposit Day	You Receive Funds
Monday	Thursday	Friday
Tuesday	Friday	Monday
Wednesday	Monday	Tuesday
Thursday	Tuesday	Wednesday
Friday	Wednesday	Thursday
Saturday	Wednesday	Thursday
Sunday	Wednesday	Thursday

## Fees

When accepting online payments, your church will incur a monthly and transaction fees from Vanco Payment Solutions and ACS Technologies.

**Questions about fees?** Our eGiving Coaches are happy to help.


To schedule a call with a coach, visit <https://giving.acstechnologies.com/lets-talk> or email [giving@acst.com](mailto:giving@acst.com).

## Enable Online Giving

Online Giving lets members contribute to your organization using credit cards, debit cards, and electronic checks. When members make contributions online, they can select the funds to which they want to contribute.

System administrators must enable Online Giving and have a merchant account. To learn more, see ACS Pay Plus New User Checklist.

### To enable online giving

1. Sign in to Access ACS.
2. Point to **Admin**, then click **Merchant Account Profile**.
3. For **Online and Text Giving** and **Event Registration**, click  to select the merchant account you want to use for each, then click **Update**.
4. Click **Enable Online Giving**.
5. Select **I agree to be charged additional fees for Online Giving** and **I agree to the Terms and Conditions for Online Giving**. To learn more about the fees and terms, click on the links in the text.
6. Click **Sign Up**.
7. After enabling online giving, click **Go to Online Giving Setup** to select giving options and funds.

Next, it's time to **Set up Online Giving**. Once you sign up for Online Giving, you can place your organization's Online Giving URL on your website to give your members easy access. Members can also sign in to Access ACS to use Online Giving.



# Online Giving Setup

You must have administrative rights to update Online Giving Settings.

With appropriate administrative rights, you can set up online giving or update your settings. To do this, point to **Giving**, click **Online Giving Setup**, then select the appropriate options on each tab.

With ACS Pay Plus, you cannot refund online gifts through Access ACS. You can only refund event payments. If you need to return an online gift to the contributor, contact Vanco at 1-800-675-7430.

## Global Settings

The **Global Settings** tab is where you select the basic setup options for online giving.

You can turn on public giving or scheduled giving, and you can allow administrators to enter and update scheduled gifts.

Turning Scheduled Giving Off

If you turn scheduled giving off, all past, current, and future recurring gift information is deleted and cannot be restored.

**Allow Public Giving** lets anyone give online, not just church members.

**Allow Scheduled Giving** enables recurring giving in Access ACS.

**View Pledge Summary** lets individuals view pledge summary information while giving.

**Administer Scheduled Gifts** lets financial administrators enter and update scheduled gifts. Contributors can set up their own giving schedule, and administrators can add and edit scheduled gifts and payment methods on the contributor's behalf.

If selected, financial administrators must obtain authorization forms and comply with documentation requirements.

You can also select which payment forms you want to accept (Credit and Debit Cards, Debit Cards Only, and/or Electronic Checks).

After making your selections, click **Save**.

## Funds Setup

On the **Funds Setup** tab, you can select which funds are available for online giving and text giving. You can select multiple funds, and you can drag and drop funds to display them in a different order.

You can also enable a fund for text giving. When selected, these funds display on the **Text Giving** tab, where you can set up keywords so contributors can give directly to them.

1. Point to **Giving**, then click **Online Giving Setup**.
2. Click the **Funds** tab.
3. Click **Select Funds**.
4. Select the funds you want to include for online giving, then click **Save**.
5. To enable text giving for a fund, select **Enabled for Text Giving**.

If no funds display, you must upload funds from ACS Contributions to Access ACS.

1. Open ACS People Suite.
2. Under Advanced Tools, click the **Admin Utilities** tab.
3. In the drop-down list, select **Sync with Access ACS**, and click **Go**.
4. Select **Upload to Access ACS**, then select **Include Contributions**. Do not clear any other selections.
5. Click **Upload**.

## Text Giving

When contributors give via text, they text your church's keyword, along with the gift amount, to the 5-digit number.

*Example:* If your church's permanent keyword is FBCMTPLEASANT, contributors text **FBCMTPLEASANT \$10** to give \$10 toward the default texting fund.

- Choose a keyword that represents your church as a whole.
- Short, easy to remember keywords are best. The longer the word is, the more likely a contributor will enter a typo.
- You cannot change your church's keyword, so review your choice carefully before accepting it.

1. On the **Text Giving** tab, enter a permanent keyword for your church's text giving. The keyword is not text sensitive.
2. Click **Next**.

3. If your keyword is not available, choose another keyword. Each church that uses text giving through Access ACS must have a unique keyword.
4. If your keyword is available, select **I have reviewed and accept this permanent keyword**, then click **Accept**.

After your church keyword is set up, funds enabled for text giving display on this tab. You can assign fund keywords to each fund so contributors can give toward specific campaigns.

*Example:* You can set up a fund keyword for the building fund. Your permanent church keyword is FBCMTPLEASANT, and your building fund keyword is BUILD. Contributors can text **FBCMTPLEASANT BUILD \$10** to give \$10 to the building fund.

Each fund can have multiple keywords (separated by a semicolon), *but two funds cannot have the same keyword*. So, if the Missions fund uses the keyword GIVE, no other fund at your church can use that keyword.

1. On the **Text Giving** tab, under **Funds for Text Giving**, click on the fund you want to assign a keyword for. If no funds display, return to the **Funds Setup** tab and select the funds you want to allow text giving for.
2. In the **Fund Keyword(s)** field, enter a fund keyword.
3. If this fund is the default fund for text giving, select **Default Texting Fund**. If the contributor doesn't include a fund keyword, the gift is allocated toward the default texting fund.
4. When finished, click **Submit**.

## Publicize

On the **Publicize** tab, a link to online giving displays. To help contributors give online, place this link on your church's website.

You can also create an announcement for text giving.

### To announce text giving

1. On the **Publicize** tab, in the drop-down list, select the **Fund Keyword** you want to announce. To create an all-purpose announcement, leave the field blank.
2. **Optional:** In the **Recommended Amount** field, enter a recommended gift amount.
3. Click **Generate**.

Your announcement displays on the tab. Generating the wording does not notify clients about text giving, but you can copy and paste it into your church bulletin or display it on a projector during the service.

## Receipts

The **Receipts Tab** is where you create payment receipts for contributors using the following two e-mail templates.

- **Payment Processed** - Send this receipt to individuals when a gift has successfully processed.
- **Recurring Payment Setup** - Send this receipt to individuals when a recurring gift has successfully processed.

**Subject** Enter the text you want to display in the subject line of the receipt e-mail.

**Message Header** Enter the message you want to display in the body of the receipt e-mail.

**Reply-To Information** Enter the e-mail address you want responses sent to, and the name you want displayed as the recipient in the available fields.

## Locate Online Giving Links

Now it's time to let everyone know where they can go to give online.

Inside Access ACS, you can locate your online giving link on the **Admin > Options** menu.

### To locate the online giving web link

1. Point to **Admin**, then click **Options**.
2. Click the **Web Links** tab.
3. Locate the Online Giving tab, then click **Generate**.
4. Copy the online giving link, and use this link anywhere you want to let people know about online giving.

# Processing Times

## ACH Refunds

ACH refund requests received before 3 PM CST are applied to the contributor's account at business open of the next business day. Requests received after 3 PM CST are applied to the contributor's account at business open in 2 business days.

## Credit Card Refunds

Credit card refunds are processed immediately and are applied with the next available settlement batch. The next available settlement batch can occur on the same day or on the following calendar day. The amount of time it takes the card issuer to apply the refund to the contributor's account varies, but typically it is 1-2 business days after the settlement batch is sent.

## Payments

Processing times will vary depending on what payment method is used.

If a transaction fails, unprocessed recurring gifts are placed on hold, and contributors are notified by email. From this email, donors can sign into Access ACS and fix the payment method.

Banks may or may not notify contributors about any returns. Vanco will always notify the church but will never email contributors directly. It's up to the church to decide how it wants to communicate this.

## ACH

Day 1	Day 2
<ul style="list-style-type: none"> <li>• Vanco Payment Solutions transmits the transaction file at 3 PM CST.</li> </ul>	The transaction is debited from the member or guest's bank account and deposited into your organization's bank account.

## Credit Cards (Non American Express)

Day 1	Day 2	Day 3
<ul style="list-style-type: none"> <li>• Vanco Payment Solutions transmits the transaction file at 3 PM CST.</li> </ul>	Processing	Funds are deposited in to your organization's bank account.

## Credit Cards - American Express

Day 1	Day 2	Day 3	Day 4
<ul style="list-style-type: none"> <li>• Vanco Payment Solutions transmits the transaction file at 3 PM CST.</li> </ul>	Processing	Processing	Funds are deposited in to your organization's bank account.

# Updating Your Merchant Account Information

The Merchant Account Update Form lets you update your organization's

- Bank accounts
- Legal name, DBA name, or Federal Tax Identification Number
- Primary and administrative contacts



You can complete and submit this form online.

**Merchant Account Update Form (US)**

**Merchant Account Update Form (Canada)**

## Manage Deposit Accounts

To make reconciling deposits easier, assign different accounts for online giving and event registration. When you use two accounts, your online contributions batch separately from your event payments. You can post these batches to the same physical bank account or separate bank accounts. If you only see one account, contact Vanco Client Services at 800-675-7430 to enable a second account.

1. Point to **Admin**, then click **Merchant Account Profile**.
  2. For **Online Giving is using Account**, click  beside the name of the merchant account.
  3. Select the new merchant account from the drop-down list, then click **Update**.
- 
1. Point to **Admin**, then click **Merchant Account Profile**.
  2. For **Event Registration is using Account**, click  beside the name of the merchant account.
  3. Select the new merchant account from the drop-down list, then click **Update**.

## Accept Gifts from International Addresses

If you want to accept gifts from addresses outside the US and Canada, e-mail [riskmgmt@VancoPayments.com](mailto:riskmgmt@VancoPayments.com). Vanco will set a flag to allow you to enter international billing addresses.

## Why Are Sub-Accounts Important?

Sub-accounts allow you to do more with Vanco Payment Solutions. For example, you can open a sub-account to use a mobile or desktop card reader in addition to using online giving. With ACS Pay Plus, you can have several sub-accounts at no additional charge.

## Reconciliation

Segregating accounts into sub-accounts helps you track how much money is being brought into your organization through online giving and event registration. Reconciling the reported totals from your banking records against what you have listed as processed is more streamlined when you use subaccounts. We highly recommend using sub-accounts for accounting purposes.

## Adding a Sub-Account

To add a sub-account, complete the Add-On Services form.

# Managing Scheduled Gifts

Sometimes, people may be uncomfortable giving online or find it hard to do.

Contributors may call your church office or stop by in person to change their giving information or add a new gift. For convenience, we have a paper form that contributors can complete to authorize the church administrator to do it for them.

When you add, edit, delete, or place a gift on hold, you must complete, file, and store authorization forms. You can also automatically print this documentation when managing scheduled gifts in Access ACS.


ACS Pay Plus automatically sends a confirmation email anytime a contribution is made. All of these options help your church maintain a paper trail and comply with online giving documentation requirements.

To learn the best practices and what your responsibilities may be, see Enter Gifts on Behalf of a Contributor.


## Add, Edit, or Delete Gifts

1. In ACS Pay Plus, click **Giving > Manage Scheduled Giving**.
2. Enter the contributor's name, then click **Search**. A list of contributor names and records displays.
3. Locate the contributor whose gifts you want to add, then click **Manage Gifts**.
4. On the **Current** tab, click **Add New Gift**.
5. Under **Admin Details**, select **I understand and agree to the documentation requirements for managing scheduled giving and payment methods**.
6. Enter a **Reason** for adding the gift. For example, phone call, walked in, contributor request.
7. Under **New Gift Details**, enter the gift amount, select a fund, and enter an optional memo.
8. Select the gift's **Frequency** and start and end dates.
9. Under **Payment Details**, enter the contributor's **Nickname**, **Account Type**, **Account Number**, and **Expiration Date**. If necessary, update the billing information.
10. Select **I would like to automatically print documentation for this gift**. This generates a form that complies with documentation requirements, which you can print for your records. If the contributor already completed the Client Initiated Gift Form or the form in the Electronic Giving Brochure, you can skip this step.
11. Click **Schedule Gift**.

After scheduling a gift, you may need to update it. For example, a contributor may call the church office and want to increase or decrease the weekly gift, or change the gift's frequency from weekly to monthly.

1. In ACS Pay Plus, click **Giving > Manage Scheduled Giving**.
2. Enter the contributor's name, then click **Search**. To filter results, select **Only contributors with scheduled giving**.
3. When the list displays, locate the contributor whose gifts you want to edit, then click **Manage Gifts**.
4. On the **Current** tab, locate the gift you want to edit, then click .
5. Under **Admin Details**, select **I understand and agree to the documentation requirements for managing scheduled giving and payment methods**.
6. Enter a **Reason** for adding the gift. For example, phone call, walked in, contributor request.
7. Under **Edit Gift Details**, update the gift information with the contributor's changes.
8. If the contributor wants to change payment methods, under **Payment Details**, select the account, or click **Add a New Payment Method**.
9. Select **I would like to automatically print documentation for this gift**. This generates a form that complies with documentation requirements, which you can print for your records.
10. Click **Schedule Gift**.


You can delete a gift if you need to. When you search for the contributor in Manage Scheduled Gifts, deleted gifts display on the **Deleted** tab.


1. In ACS Pay Plus, click **Giving > Manage Scheduled Giving**.
2. Enter the contributor's name, then click **Search**. To filter results, select **Only contributors with scheduled giving**.
3. When the list displays, locate the contributor whose gifts you want to delete, then click **Manage Gifts**.
4. On the **Current** tab, locate the gift you want to delete, then click .
5. When the confirmation message displays, enter a **Reason** for deleting the gift, then click **Confirm Delete**.

## Giving Schedules - On Hold

The **Giving Schedules - On Hold** section only displays if you have a deactivated gift. Deactivated gifts can be activated or deleted from the Giving Schedules - On Hold section.

Sometimes, contributors cannot donate on the scheduled basis, due to financial constraints. If this occurs, you can place a gift on hold.

1. In ACS Pay Plus, click **Giving > Manage Scheduled Giving**.
2. Enter the contributor's name, then click **Search**. To filter results, select **Only contributors with scheduled giving**.
3. When the list displays, locate the contributor whose gifts you want to place on hold, then click **Manage Gifts**.
4. On the **Current** tab, locate the gift you want to place on hold, then click .
5. When the confirmation message displays, enter a **Reason** for deleting the gift, then click **Place on Hold**.

1. In the **Giving Schedules - On Hold** section, under **Actions**, click **Activate** .
2. The gift is reinstated to the **Giving Schedules - Active** section.

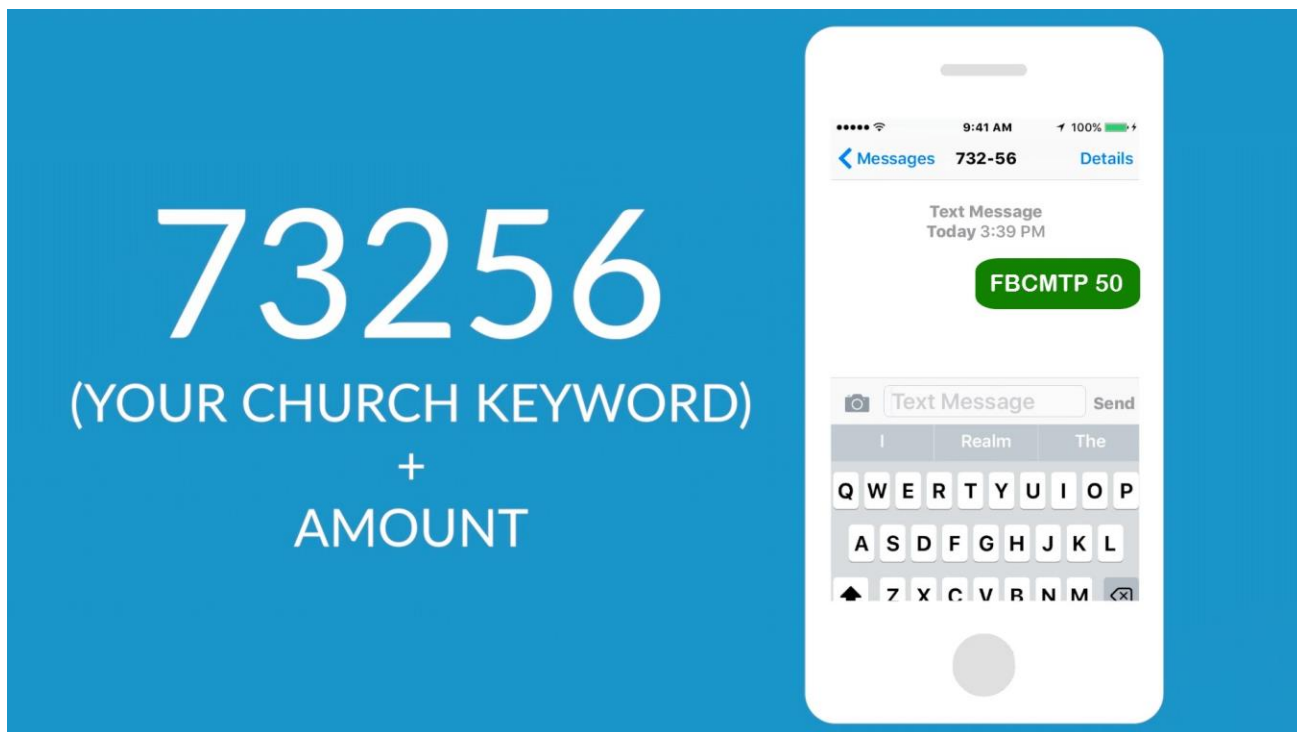
# Text Giving

If you use Online Giving with ACS Pay Plus, text giving can be added at no additional charge. To learn more, schedule a call with an eGiving coach today.

## About Text Giving

Text Giving lets contributors give to your church using their smart phones.

Contributors text your church's keyword, along with a dollar amount, to **73256**.



Your church's name displays in the confirmation text, payment form, and on the contributor's receipt. Within Access ACS, text gifts are processed just like online contributions.

Contributors can give via text using debit cards, credit cards, or ACH payments. It takes first-time contributors about 2 minutes to set up their payment method, which is saved for future text gifts.

## Set up Text Giving

If you use Online Giving with ACS Pay Plus, follow these steps to set up text giving:

On the **Funds Setup** tab, you can select which funds are available for online giving and text giving. You can select multiple funds, and you can drag and drop funds to display them in a different order.

You can also enable a fund for text giving. When selected, these funds display on the **Text Giving** tab, where you can set up keywords so contributors can give directly to them.

1. Point to **Giving**, then click **Online Giving Setup**.
2. Click the **Funds** tab.
3. Click **Select Funds**.
4. Select the funds you want to include for online giving, then click **Save**.
5. To enable text giving for a fund, select **Enabled for Text Giving**.

If no funds display, you must upload funds from ACS Contributions to Access ACS.

1. Open ACS People Suite.
2. Under Advanced Tools, click the **Admin Utilities** tab.
3. In the drop-down list, select **Sync with Access ACS**, and click **Go**.
4. Select **Upload to Access ACS**, then select **Include Contributions**. Do not clear any other selections.

5. Click **Upload**.

## Reserve Your Permanent Church Keyword

Contributions are processed by your permanent church keyword. When contributors give via text, they text your church's keyword, along with the gift amount, to the 5-digit number. In the example above, the permanent church keyword is **FBCMTP**.

You should choose a keyword that represents your church as a whole. Short, easy to remember keywords are best. The longer the word is, the more likely a contributor could enter a typo. Keywords are not case sensitive.

Once this keyword is set, you cannot change it, so review your choice carefully before accepting it.

### Keyword Requirements

- Keywords must be between 3-20 characters.
- Keywords cannot have spaces or special characters.

### Keyword Recommendations

- Keywords do not have to be giving specific.
- You can use your church's name, abbreviation, or part of your church's website URL.
- Check with other church staff members before locking in the keyword.

1. On the **Text Giving** tab, enter a permanent keyword for your church's text giving. The keyword is not case sensitive.
2. Click **Next**.
3. If your keyword is not available, choose another keyword. Each church that uses text giving through Access ACS must have a unique keyword.
4. If your keyword is available, select **I have reviewed and accept this permanent keyword**, then click **Accept**.

## Create Fund Keywords for a Faster Giving Experience

On the **Text Giving** tab, you can assign fund keywords to each fund so people can contribute toward specific campaigns.

Unlike the permanent church keyword, fund keywords are not reserved, so you can be a bit more creative. Each fund can have multiple keywords (separated by a semicolon), but two funds cannot have the same keyword. If the Missions fund uses the keyword GIVE, no other fund at your church can use that keyword.

For example, you can set up a fund keyword for the building fund. Your permanent church keyword is FBCMT, and your building fund keyword is BUILD. Contributors can text **FBCMTP BUILD 10** to give \$10 to the building fund. If the contributor doesn't include a fund keyword, the gift is allocated toward the default texting fund.

1. On the **Text Giving** tab, under **Funds for Text Giving**, click on the fund you want to assign a keyword for. If no funds display, return to the **Funds Setup** tab and select the funds you want to allow text giving for.
2. In the **Fund Keyword(s)** field, enter a fund keyword.
3. When finished, click **Submit**.

## Select Your Default Fund

You must select a default fund. If someone gives via text and doesn't include a fund keyword, the gift is allocated toward the default texting fund. Any text enabled fund can be the default fund, but normally this is a general fund. You can enter a fund keyword for your default fund, but you don't have to.

1. On the **Text Giving** tab, under **Funds for Text Giving**, click on the fund you want to assign as your default fund. If no funds display, return to the **Funds Setup** tab and select the funds you want to allow text giving for.
2. Select **Default Texting Fund**.
3. When finished, click **Submit**.

## Selecting Payment Options

You can accept text gifts from credit and debit cards or debit cards only.



# Assign the Pledge Administrator E-mail Address

When members and attendees enter pledges, Access ACS e-mails the administrator a notification. An administrator must approve pledges.

In this area, enter the e-mail address of an administrator who will approve all pledges.

## To set up the pledge administrator e-mail addresses

1. Point to **Admin**, then click **Options**. The Global Preferences page displays.
2. In the **Assign Administrator E-mail** section, enter the pledge administrator's e-mail address.
3. Select the **Pledges** option, then click **Add**. The e-mail address displays in the grid.
4. Repeat steps 2 and 3 for each general administrator e-mail address you want to add.
5. Click **Update**.

Pledge administrators should have full security rights to **Personal Pledges** and **Other Member Pledges**

# Apply Pledge Change Requests


When contributors add pledges, a change request is created in Access ACS.

This change request displays under **New Change Requests** on the Administrative Dashboard, and an administrator must apply it.

Pledges cannot be added if the:

- contributor already has a pledge for that selected fund and date
- range fund no longer exists in ACS People Suite contributor no longer has a record in ACS People Suite.

## To apply change requests

1. Log into ACS People Suite.
2. Under Advanced Tools, click on the **Admin Utilities** tab.
3. In the drop-down list, select **Sync with Access ACS**, and click **Go** .
4. Under **Change Requests**, click **Pledges**.
5. Click **Apply**.

# Set up and Work with Events

Events Setup lets you create events that members can register for online. With an authorized merchant account, you can associate costs with your events and let members pay for events online.

With Events Setup, you can also set up sub-events, and with an approved merchant account, you can set up costs for sub-events. When members and attendees register for an event, they can also sign up for sub-events. For example, you set up a weekend retreat. During the retreat, you plan to offer several sessions for registrants. You can set up each session as a sub-event.

To add an event, click **Create New Event** in the appropriate section.

## Set up Event Registration Preferences

Under Event Registration Preferences, you can select what information you want to require from individuals when they register for events.

By default, individuals are required to enter their name and e-mail address when registering. You have the option to only require individuals to enter their address and phone number. To save any changes you make to Event Registration Preferences, click **Save**.

### To set up event registration preferences

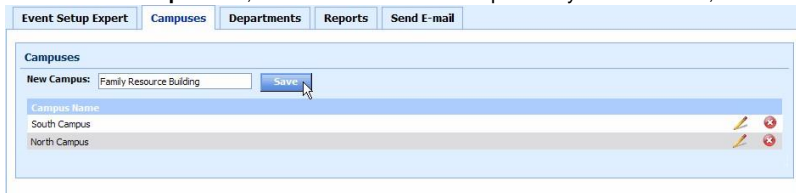
1. In Access ACS, click **Admin > Options**.
2. On the Global Preferences tab, under Event Registration Preferences, select **Allow registrants to only enter their name and e-mail** or **Require registrants to enter their address and phone information**.

## Set Up Campuses


Campuses are user-defined locations associated with your organization. For example, you can set up a campus named Family Resource Building and associate it with events at that location.

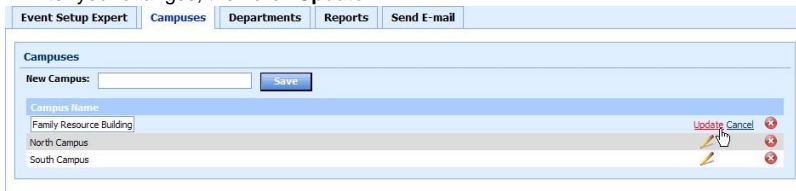
When you add or edit events, you can associate them with campuses. You must set up your campuses before you can associate them with events.

1. Point to **Events**, then click **Events Setup**.
2. Click the **Campuses** tab.
3. In the **New Campus** field, enter the name of the campus that you want to add, then click **Save**.




The screenshot shows the 'Campuses' tab in the 'Event Setup Expert' interface. At the top, there are navigation tabs: 'Event Setup Expert', 'Campuses', 'Departments', 'Reports', and 'Send E-mail'. Below the tabs, the 'Campuses' section is active. It features a 'New Campus' input field containing the text 'Family Resource Building' and a 'Save' button. Below this, there is a table listing existing campuses: 'South Campus' and 'North Campus'. Each row in the table has an edit icon (pencil) and a delete icon (red X).

1. Point to **Events**, then click **Events Setup**.
2. Click the **Campuses** tab.
3. Beside the campus that you want to change, click **Edit** .
4. Enter your changes, then click **Update**.



The screenshot shows the 'Campuses' tab in the 'Event Setup Expert' interface. The 'New Campus' field is empty. Below it, the table of campuses is shown. The row for 'Family Resource Building' is highlighted, and the 'Update' button (pencil icon) is visible next to it. The 'Delete' button (red X) is also visible next to the 'Update' button. The 'South Campus' row is also visible below it.

1. Point to **Events**, then click **Events Setup**.
2. Click the **Campuses** tab.
3. Beside the campus that you want to remove, click **Delete** .

## Set Up Departments

Departments are user-defined areas of your organization. For example, you can set up a department named Youth and associate it with events for the youth groups.

When you add or edit events, you can associate them with departments.

1. Point to **Events**, then click **Events Setup**.

2. Click the **Departments** tab.
3. In the **New Department** field, enter the name of the department that you want to add.
4. Click **Save**.

## View Event Registration URLs

Once you create or sign up for an event, you can access your main Event Registration URL on the Web Links page. When members and attendees visit this URL, they can browse all of your available events and decide if they want to sign up.

Access ACS also creates individual URLs for each event that you create. These URLs link directly to information about a specific event.

### To view your main Event Registration URL

1. Point to **Admin**, then click **Options**.
2. Click **Web Links**. The URL displays in the Event Registration Link section.

### To view an individual Event Registration URL

1. Point to **Events**, then click **Events Setup**.
2. Click the name of the event. The event URLs display in the Web Link section.

## Sign Up for Events from your Web Site

Once you have posted the event registration URL on your website, visitors can sign up for events online.

On the sign-up screen, if a visitor has a user name and password, he or she enters it in the **User Name** and **Password** fields and continues the registration process.

If a visitor does not have a user name or password, or has forgotten them, he or she enters in the required information, and one of the following actions occurs:

- **If the individual is a member of the church and has already been assigned a user name and password**, he or she receives an e-mail with their login information. To complete the sign-up process, the user must log in to Access ACS using this name and password.
- **If the individual is a member of the church, but does not have a user name and password**, he or she is assigned a guest profile and can continue the registration process. An e-mail is sent to the individual containing the user name and password. Members are assigned a Member profile.
- **If the individual is not a member of the church**, he or she is assigned a guest profile and can continue the registration process. An e-mail is sent to the individual containing the user name and password.


# Create Events

The Event Setup Expert lets you create a new event. After you create and confirm your event, you can add sub-events, tags, supplies, and locations.

1. Point to **Events**, then click **Events Setup**.
2. Click **Create New Event**.
3. If prompted, select an event type.
4. In the available fields, enter general information about the event. You can also upload an image and add a description.
5. Select the event's location.
6. Select any resources you need, then click **Next**.
7. Enter any contact, campus, or department information, then click **Next**.
8. Enter your registration periods.
9. Enter any payment options.
  - **Accept Online Payments** - Lets members and attendees pay for registration online using an approved credit card, debit card, or electronic check. This option requires you have an Access ACS approved merchant account.
  - **Accept Offline Payments** - Lets members and attendees pay for registration offline. This option can be used for cash, personal checks, and other forms of payment not covered under the Accept Online Payments option.
    10. Select if registrants can register additional guests. Click **Next**.
  - **Allow registrants to register guests (with names)** - Lets members and attendees register individuals with names for the event. The individual's first and last name are required for the registration to be complete.
  - **Allow registrants to register guest (number of guests only)** - Lets members and attendees register a large number of individuals for an event without having to specify each and every one. If you select this option, you won't know these guests' names.
11. Enter any capacity information, requirements, or forms. Click **Next**.
12. In the **Your Custom Message** field, enter a custom message registrants receive. You can include event details, images, receipts, and links to files for downloading as well. Click **Next**.
13. To confirm the event, select **Click here to confirm this event to allow individuals to sign up**.
14. Click **Finish**.

If your church uses ACS Facility Scheduler with Event Registration, additional fields display to guide you through entering information on the event for the church calendar.

When you create new events, the Events Coordinator must approve and confirm them in ACS Facility Scheduler before they display.

1. Point to **Events**, then click **Calendar**.
2. On the right side of the page, click **Add Event**.
3. If Event Types are already established in Facility Scheduler, select the **Event Type** that matches the event you want to create. If Event Types have not been established in Facility Scheduler, the Add/Edit Event page displays.
4. Enter an event name and select a calendar. If you want the event to display on multiple calendars, click **Add the event to other calendars**. In the Select Multiple Calendars dialog box, select the desired calendars and click **OK**. Event names can 50 characters long and contain letters, numbers, and special characters.
5. Select if the event reoccurs. If so, enter the recurrence pattern.
6. Enter a start time and date, and an end time and date for the event. To select the date from a calendar, click . If the event lasts the entire day, select **All Day**.
7. To select an image to represent the event, click **Click to add an image for this event**. You can either **Select a picture from your Media Files** or **Browse and Upload** an image from your computer.
8. Enter a Description to display for the event. Descriptions are limited to 500 characters and can contain letters, numbers, and special characters. To check your spelling, click **Check Spelling**.
9. If necessary, select any tags you want to associate with the event. Select a tag from the drop-down list, then click **Select**. If the tag you want is not available, click **Add** to add it to the list. For more information on tags, see Tags.
10. Continue entering location and resource information.
11. Once you have entered the necessary information, click **Save** to continue the Event Registration Setup.

## Add Sub-Events

After you create and confirm your event, you can add sub-events.

For example, you set up a youth camping retreat event. During the retreat, you plan to offer multiple sessions for participants to attend. You can set each session up as a sub-event. When members register for the youth retreat, they can also sign up for different sessions.

You can also set up prices for sub-event registration periods, or offer free sub-events. If you have an authorized merchant account, members can pay registration fees online.

### To add a sub-event

1. Create and confirm your event.
2. Navigate to **Events > Event Setup**.
3. Under **Event Setup Expert**, click on the name of your event.
4. Under **Sub-Events**, click **Add Sub-Event**.
5. In the **Event Name** field, enter your sub-event's name.
6. Select the **Start Date** and **End Date**.
7. Enter the sub-event's **Description** and click **Next**.

8. Add any applicable registration periods for the sub-event, then click **Next**.
9. Enter the sub-event's capacity and openings.
10. To create custom questions, select **Collect additional custom information from the registrant**.
11. To set up additional supplies for the sub-event, select **Allow registrants to order additional supplies for this event**.
12. Upload any sub-event waivers, permission slips or other forms. Click **Next**.
13. To confirm the sub-event and allow individuals to register for it, click **Finish**.

## Add Tags to Events

Tags help you to describe and categorize events. You can add tags to a single event or a series of recurring events. You can also add or remove tags from events.

Tags:

- cannot contain apostrophes limited to 30 characters in length
- spaces are allowed in tags, but count against the 30 character
- limit all tag names are automatically converted to lowercase
- an event can have a maximum of 20 tags
- the permission to select, add, edit, and delete tags for an event must be turned on

1. Point to **Events**, then click **Calendar**.
2. Locate the calendar with the event you want to edit and click the event.
3. Click **Edit Event**.
4. In the **Tags** section, enter the first letter of the tag in the **Tags** field. A drop-down list displays with the first tag that begins with the letter you entered highlighted.
5. If the highlighted tag is the one you want, click **Select**. If it is not, scroll through the list until you find the correct one, then click **Select**.
6. Continue adding tags until you are finished, then click **Next**.

## Request Event Locations

There may be times you will need to plan for an alternate location for an event. Bad weather can quickly halt an outdoor activity, or a much larger number of guests attending an event can exceed occupancy. With Facility Scheduler and Access ACS, you can establish additional, contingency locations for your events.

By default, the first location entered is the primary location.

If you need to change the primary location, select the **Primary Location** check box beside the new location.

### To add a location

1. On the **Location Request** bar, click **Add Location**.
2. Select a **Location Category**.
3. Select a **Location**. Location may vary depending on the Category you selected.
4. If necessary, enter the maximum number of occupants for the location in the **Occupancy** field.
5. If the location is the primary location for the event, select the **This is the primary location** option.
6. To add more locations for an event, click **Add Location**, select the location information, and click **OK**. Repeat until you have all of the necessary locations entered.
7. Click **OK**.

To delete a location, click  in the location row.



## Request Event Resources

Enter any resources that you may need for the event in this section. When events are confirmed in ACS Facility Scheduler, the program verifies that they are available for the event.

### To request resources

1. Click **Add Resource**.
2. Select a **Resource Type** from the drop-down list.
3. Select a **Resource Category** from the drop-down list.
4. Select a **Resource** from the drop-down list.
5. Enter the total number of the resource you need in the **Quantity** field.
6. Click **OK**.



### To edit resource quantities

1. In the grid row of the resource you want to edit, click .
2. Change the quantity of the resource item to match your needs.
3. Click .

To delete a resource, click  in the location row.

## Set Up Additional Supplies

If you offer additional supplies for an event or sub-event, you must set up the supplies. If you did not select **Allow registrants to order additional supplies for this event** on the Special Requirements page, you do not need to complete this step.

- If you have an approved merchant account, you can associate a fee with the supply or offer it for free.
  - To edit a supply, click the description of the supply. After you make your changes, click **Update**.
  - To view a supply's image, click  in the **Image** column.
  - To delete a supply that members have not reserved, click **Delete** . After members reserve or purchase a supply, you cannot delete it.
1. In the **Description** field, enter a description of the supply.
  2. The following fields are optional:
    - **Supply Capacity** — Enter the number of supplies available.
    - **Cost Per Unit** — Enter the cost of the item. If the item is free, type 0. You cannot change this once a registrant has purchased a supply.
    - **Tax Rate (if taxable)** — Enter the tax rate in decimal format. For example, type 0.1 instead of 10%. You cannot change this once a registrant has purchased a supply.
    - **Active** — Select to display the supply when members and attendees register. If you mark a supply as Inactive, it displays as view-only when guests register for the event.
  3. Click **Add Supply**. The supply displays in the list.
  4. To set up multiple supplies, repeat steps 1–3.
  5. After you add your supplies, click **Next**.

## Supply Image

When you upload a supply image, you can reuse it for multiple supplies.

Let's say your event offers t-shirts, and you want to upload an image of the shirt's logo. You should set up a supply for each size shirt offered, but you only need to upload the image once. As you add each additional shirt size to your list of supplies, you can select the image from the list.

You can also rename a supply image to make selecting it for future events easier.

1. In the Event Registration Expert, click **Click to add an image for this supply**. A list of images displays.
2. To narrow down the list, under **Image or File Name**, enter a portion of the image name, then click **Find**.
3. To preview the image before uploading, click **View**.
4. If you don't see an image that meets your needs, click **Add New** to upload one from your computer.
  - Enter the image name.
  - Click **Choose File**. Select the image, then click **Open**.
  - Click **Upload**.
5. To select the image and add it to your supply, click **Select**.
6. If applicable, rename the image for easier selection on future events, then click **Save**.

After you set up the additional supplies, click **Next** to continue to the next step.

If you're editing an event, click **Next** to continue editing or click **Finish** to save your changes.

## Set Up Registration Periods

After you enter general information about the event, you can set up registration periods. These are the time periods that members and attendees are allowed to register for an event or sub-event.

### Registration Periods

You must set up at least one registration period. If more than one registration period is added, those periods can overlap.

You can edit or delete registration periods. Once members register during a registration period, you cannot delete it.

1. On the **Registration Periods** page, click **Add Registration Period**.
2. Enter a name for the period. This field is required.
3. The following fields are optional:

- Beside the **Start Date** field, click and select the first day that you want the registration period to be available.
  - Beside the **End Date** field, click and select the last day that you want the registration period to be available.
  - **Total Period Cost** — Enter a price for the registration period.
4. Click **OK**. The registration period displays in the list.
  5. If you set up a cost for a registration period, select your payment options for the event.
  6. If necessary, make selections for guests with names and guests without names.
  7. After you add your registration periods, click **Next**. To set up multiple registration periods, repeat steps 1–3.

To edit a registration period, click **Edit** for the period you want to change. After you make changes, click **OK** to save your changes. Your changes only apply to future registrations.

To delete a registration period, click **Delete** for the period you want to remove.


To reorder registration periods, under **Period Name**, drag and drop the periods into the desired order, then click **Next** or **Finish**.

## Adding Costs

You can associate costs with each registration period and accept deposits. For free events, enter **0** for the **Total Period Cost**. If you set up a cost for a registration period, you can select the payment options you want to offer for the event. You can use on and offline payments. The payment options you select apply to the entire event. By default, **Accept Online Payments** is selected if you have an approved merchant account. If you have not set up a merchant account, **Accept Offline Payments** is selected by default.

## Make Event Registration Payments


Sometimes paying the entire amount for an event is not possible, especially if several guests are also registered. In this case, you can take partial, multiple payments of varying amounts from individuals and guests.

1. Point to **Events**, then click **Events Setup**.
2. Click the **Seats Sold** value for the desired event, then click **Enter Payments**.
3. Enter the **Last Name** or the **First Name/Goes By Name** for the individual.
4. Click **Run Search**.
5. Under **Search Results**, click the name of the individual you want. If the individual has also registered guests, they display beneath their name. You can click either the individual's name or the guest name to make payments.
6. Enter the **Total Payment Amount**. If you are making a payment for both the individual and their guest(s), the **Total Payment Amount** must equal the total of both of the payments. For example, you want to pay \$25.00 for the individual and \$10.00 for the guest; your **Total Payment Amount** would be \$35.00.
7. Enter the **Date** you want the payment to be made. To select the date from a calendar, click .
8. If necessary, enter a **Memo** for the payments. For example, "Apply to deposit costs."
9. If you are entering payments for a single individual, then the amount entered in the **Total Payment Amount** displays in the **Payment Amount** field.
10. If you are entering payments for an individual with guest(s), then you must enter the amounts you want applied towards their payments in their **Payment Amount** fields. The total of the **Payment Amount** fields must equal the **Total Payment Amount**. For example, you entered \$100.00 in the **Total Payment Amount** field, you would then enter \$75.00 in the individual's **Payment Amount** field, and \$25.00 in the guest **Payment Amount** field.
11. Click **Process Payment**.

## Create Custom Questions


If you want to include questions for event registrants to answer, you can create custom questions.

For example, if your registrants are signing up for Vacation Bible School, you can create a Yes or No custom question to ask if the children they are registering have any allergies, then create a single line text question to ask what those allergies are.

You can edit and delete questions after adding them. After members answer a question, you cannot delete it. To prevent it from displaying for future registrations, clear the **Active?** option to disable the question. To delete a question that members have not answered, click **Delete** .

To edit a question, click the question in the list. After you make your changes, click **Update Question** to save your changes.

### To create a custom question

1. In the **Question** text box, enter your question.
2. In the **Answer Type** drop-down list, select the type of question. If you select **List of Options**, enter your answer choices in the **Options** text box. Each answer choice must be on a new line.
3. Select **Required** to make the questions mandatory for completing registration.
4. To disable a question, clear the **Active** option.
5. Click **Add Question**. The question displays in the previous list. To change the order of questions, drag and drop the question's move handle .

6. To set up multiple questions, repeat these steps.

#### Available Question Types

**List of Options** – Select to create a question with multiple answer choices.

**Paragraph Text** – Select to create questions requiring long answers.

**Single Line Text** – Select to create questions requiring short answers (up to 20 characters).

**Yes or No** – Select to create questions with yes or no answers.

## Set Up Special Requirements

After you set up registration periods, you can set up special requirements. With special requirements, you can:

- set the maximum number of participants enter the number
- of reservations for the event or sub-event set up special requirements and rules (events only) upload forms or documents create custom questions for registrants to answer offer additional supplies


If you set up special requirements for an event, they display when members and attendees register. For example, if you set up a youth retreat, you can create a requirement that says “Participants must be between ages 14 & 18.” To add a requirement, enter it in the **New Requirement** field and click **Add Requirement**.

## Permission Slips, Waivers?

If you set up a field trip for children, or another event or sub-event requiring a documentation, you can upload forms and documents for the event.

### To upload a form or document

1. On the **Special Requirements** area, enter a **Description** of the document.
2. Click **Browse**. A **Choose file** dialog box displays.
3. Select the file and click **Open**. The file name displays in the **New Form** field.
4. Click **Upload**.

To delete a form, click **Delete** .

## Add Images To Events

When you create an event in Access ACS, you can add an image to the event. If you don't find the image you're looking for, you can add one from your computer.

If you use ACS Facility Scheduler, media categories make it easier to locate and reuse images. You must add new media categories within Facility Scheduler.

### To add an image to an event

1. In the Event Setup Expert, under **Add/Edit Event**, click **Click to add an image for this event**. The Select an Image window displays all images in the media library.
2. To use an existing image from the media library, locate the image you want to use, then click **Select**.  
To filter images by media category, under **Media Category**, select a category. This feature only displays if you use ACS Facility Scheduler.  
To search for an image, enter part of the **Image Name** and click **Find**.  
To preview your image before adding it to the event, click **View**.
3. To add a new image from your computer, click **Add New**.  
Enter the image's name, select a media category, and enter an image description.  
To select the image, click **Choose File**.  
Select the image and click **Open**.  
Click **Upload**.
4. After adding your image, a thumbnail displays in the Event Setup Expert. Click **Next** to continue adding or editing your event.



# Add Forms To Events

When you create an event in Access ACS, you can add forms to the event.

For example, if a permission slip must be printed, signed, and returned, you can add it to the event so registrants can download it. You can also reuse forms, which is helpful if your church uses the same permission slip or registration form for several events.

You can locate existing forms and attach them to the event, or you can add a new one from your computer.

## To add forms to an event

1. In the Event Setup Expert, under **Forms**, click **Click to add a form for this event**.
2. To search for a form, under **Form or File Name**, enter part or all of the form's name, then click **Find**.
3. To display images, such as scanned forms saved as image files or PDFs, select **Show Images**.
4. If you don't see the form you need, click **Add New**.
  - Enter the form's name, then click **Choose File**.
  - Locate the form on your computer, then click **Open**.
  - To attach the form, click **Upload**.
5. When the form displays, click **Select**. You can also download the form.
6. To rename the form for the event, double-click on the form name, edit the name, and click **Save**. When you rename a form, it is only renamed for that event, not in the master list.
7. To continue creating or editing your event in the Event Setup Expert, click **Next**.

# Customize Receipts

After entering supplies for an event, you can set up a customized receipt for event registrants. You can also include event details, along with images, receipts for all registrants, receipts per individual, and link to files for downloading.

Your custom message can include up to 255 characters. You can also clear the message if you don't want to display a confirmation message on the receipt.

If you want to customize the default message, you must do so in Global Preferences.

1. In the Event Setup Expert, under **Your Custom Message**, enter the message you want to send to registrants. As you enter text, the number of characters remaining displays. The summary information always prints.
2. Under **Additional Information**, select the options you want to include in the confirmation email.
  - o **Event Details** - Includes the event description, requirements and image (if provided).
  - o **Include Image** – If the event has an image uploaded, this is selected by default. You can add an image to an event at any time, and if you do, it automatically prints on the receipt. If you don't want the image to print, return to this page and clear the option. Likewise, if you remove an image from an event, you won't have to visit this screen to clear the option.
  - o **Receipt for all registrants** - Includes the each registrant's name, confirmation number, a description of the registration, quantity, and total. The registration total, grand total, total amount paid, and amount due for all registrants also displays.
  - o **Receipt per individual/ticket** - Includes the event registration information for each individual, as well as confirmation numbers, if the registration was paid online, the location, and date. The total cost displays as well. This option is disabled by default.
  - o **Links to Files for downloading** - If you included links to download registration forms or medical releases, links to download those files display in the e-mailed receipt.
3. Click **Next**.

# Manage Events

After creating an event, you can approve, edit, copy, or delete it if you need to.

## Approve Events

You can approve an event at the end of the Event Setup Expert and on the list of events when you first view the Events Setup Expert.

To approve the event at the end of the Events Setup Expert, select **Click here to confirm this event to allow individuals to sign up** before clicking **Finish**.

If you do not approve the event at the end of the Events Setup Expert, the event can be approved on the Event list. If the event does not display when you view the list of events, select the **All Events** filter option.

### To approve an event

1. Point to **Events**, then click **Events Setup**.
2. In the list of events, click **Pending** for the event you want to approve. The event status changes to **Confirmed**.

## Edit Events

You can edit events, but your changes only affect future registrations.

### To edit an event


1. Point to **Events**, then click **Events Setup**.
2. In the list of events, click the name of the event that you want to edit.
3. To edit the main event, click **Edit Event**. To edit a sub-event, click the sub-event name.
4. On the **Event Details** page, click the event name. The **Event Setup Expert** displays.
5. Using the **Event Setup Expert**, make your changes.
6. To save your changes, click **Finish**.

## Copy Events

You can copy an existing event to create a similar event with minor changes or to create a new instance of the event.

When you copy an event registration, everything about the event is copied except the individuals who were registered for the original event and any money paid towards the original event.

### To copy an event


1. Point to **Events**, and click **Events Setup**.
2. For the event you want to copy, click .
3. Click **OK**.
4. The **Event Setup Expert** displays. Follow the Expert's instructions to rename the event and make any other necessary changes. If you do not change the name of the event in the Event Expert, the copy of the event displays in the Event Setup Expert grid as **Copy of <Event Name>**.

## Cancel Events

Administrators with appropriate rights can cancel events. When you cancel an event, any sub-events are also canceled. Members who registered for the event can receive an e-mail notifying them of the cancellation.

If you cancel an event that has a cost associated with it, you can manually issue a refund to members who paid for it. To view a list of cancellations, view the **Event Cancellations** report. To view a list of refunds left to process, view the **Event Refunds Still to Process** report.

### To cancel an event


1. Point to **Events**, then click **Events Setup**.
2. In the list of events, click  for the event that you want to cancel.
3. When the confirmation message displays, click **OK**. If the event is a future event, you can select to send cancellation emails to registrants.

# Delete Events

Administrators with appropriate rights can delete events.

When you delete an event when people have registered, Access ACS removes their registrations for the event. All information and details related to the event are removed from the program.

## To delete an event

1. Point to **Events**, then click **Events Setup**.
2. In the row of the desired event, click .
3. When the confirmation message displays, click **OK**. If the event is a future event, you can select to send cancellation emails to registrants.

You cannot delete events with online payments or refunds within the last twelve months.

# Manage Event Registrants

As an administrator, you may need to register participants for an event or cancel their registrations.

You can also issue refunds, send e-mails, and view a list of registrants.

## Register Members for Events

Administrators with rights to Locate Person, Locate Family, and Event Registrations can register members, guests, and multiple family members for events.

If you set up a hidden event, an administrator with appropriate rights must register members for it. If you create public events, a member can register from the My Overview page.

1. Point to **Events**, then click **Events Setup**.
2. In the list of events, click **Register** beside the event for which you want to register the members.
3. On the **Locate Individual** page, enter your search criteria.
4. Click **Run Search**.
5. From the search results, click the name of a member who you want to register.
6. On the **Event Details** page, click **Register**.
7. Follow the instructions on the **Event Setup Expert** pages.

If you register multiple members, you must select registration periods, select sub-events, answer questions, and request additional supplies for each member.

1. Point to **Events**, then click **Events Setup**.
2. In the list of events, click **Register** beside the event for which you want to register the members.
3. On the **Locate Individual** page, enter your search criteria.
4. Click **Run Search**.
5. From the search results, click the name of a member who you want to register guests with names for.
6. On the **Event Details** page, click **Register**.
7. Under **Register Additional Individuals**, click **Add**.
8. Enter the necessary information. Fields marked with a red asterisk are required.
9. Click **Add**, then **Next**.

## View Registrations

You can view the list of members who signed up for an event. This list provides the:

- total number of seats reserved display above the list, if
- applicable registrant's name name of person who the registrant
- is a guest of, if applicable date of registration
- total registration
- cost amount paid
- amount due
- registration status
- payment status

To view a person's payment history, click his **Amount Paid**. The Payment Details page displays.

To view an individual's complete event registration receipt, click **Receipt**. The receipt provides a complete breakdown of the total costs and payments for the event per individual. The receipt can be printed for proof of payment and record keeping purposes.

When you view the list, you can also cancel an individual's registration for an event. After you cancel a member's registration, either **Refunded** or **Partially Refunded** will display in the **Payment Status** column, depending on how the individual paid.

1. Point to **Events**, then click **Events Setup**.
2. In the list of events, click the **Seats Sold** value for the event with registrations you want to view.

# Send Event Registration E-mails

Administrators with appropriate rights can send group e-mails to registrants for an event. When you send an event registration e-mail, it is sent to the members' default e-mail addresses. All fields are required.

1. Point to **Events**, then click **Events Setup**.
2. Click the number of **Seats Sold** for the desired event.
3. Select the individuals you want to send e-mails to, or to select all individuals select the check box beside **Registrant**.
4. Click **Send E-mail**.

## Compose Message

This page lets you create, edit, and save e-mail messages. Your default e-mail address displays in the **Reply To** field; to receive e-mails at a different address, enter it in the field.

To display your name in the recipient's e-mail box in lieu of your e-mail address, enter your name in the **Friendly Name** field.

The individuals set to receive your e-mail message display in the Recipients section at the bottom of the page. Individuals who cannot receive the e-mail message display in the Non-Recipients section and you must contact them a different way.

## Templates

A template is a pre-written e-mail you can use instead of creating a new e-mail. Templates are helpful for things such as deposit reminders and thank you letters. Templates help speed up e-mail creation and reduce the risk of spelling and grammatical errors.

To use a template, click the **Default E-mail** drop-down list, select the template you want to use, then click **Apply**. The template displays in the e-mail text box.

To save an e-mail you created as a template for later use, click **Save E-mail**, enter a name for the new e-mail template, then click **OK**.

## Creating an Email

If you find that the supplied e-mail or a template does not meet your needs, you can create an e-mail message.

Clear the text from the e-mail message text box and enter your desired message. Use the available formatting toolbar and Check Spelling function to ensure the professionalism of your e-mail.

## Dynamic Text Fields

You can insert dynamic text fields into your e-mail that will automatically display the selected individual's information once the e-mail is sent. For example, you select John and Paul to receive an e-mail, then you insert the dynamic text field **Registrant's Name**. When you send the e-mail, John's name will display in his e-mail and Paul's name in his without having to create separate e-mails for each person.

To insert dynamic text fields, click the **Sign In Link** drop-down list, select the field you want to insert, then click **Insert**.

## Cancel Event Registrations

You can also cancel an individual's registration for an event. Once you cancel a member's registration, a status message displays in the **Payment Status** column.

For information about processing a refund, see Processing Refunds for an Event.

### To cancel a registration

1. Point to **Events**, then click **Events Setup**.
2. Click the number value in the **Seats Sold** column for the desired event. The Registrations list displays.
3. For the registration you want to cancel, click **Cancel**.
4. Click **OK**.

# Process Refunds

If a member's registration for a paid event is canceled, an administrator with appropriate rights must provide the member with a refund.

Before you process refunds, you must know the type of payment the member used. The payment type displays on the Payment Details page under **Payment Amount**. If the member paid with an online payment, **Online Payment** displays. You can process online payment refunds from Access ACS. If the member paid with an offline payment, **Paid in Person/by Mail** displays.

Access ACS does not process offline payment refunds, those must be handled offline and then manually entered in the program.


1. Point to **Events**, then click **Events Setup**.
2. Click the **Seats Sold** for the event.
3. Click the **Amount Paid** value for the individual you want to process the refund for.
4. Locate the correct payment and click **Refund**.
5. Click **OK**. A new Refund entry displays in the Payment grid.

If you cancel an entire event, you cannot process a refund for individual sub-events. The sub-events are refunded when you process the refund for the event.

You cannot refund online gifts through Access ACS. To return an online contributor, contact Vanco at 1-800-675-7430.

## Refund Deadlines

Sometimes, you will not be able to offer a refund after a member cancels his registration. The registration costs may be used as a deposit for a venue that cannot be refunded. If you want to deter people from canceling after a certain date, you can set a deadline, refund amount, and notification.

1. Select **Do not allow refunds after**.
2. Enter the **Refund Deadline**, or to select the date from a calendar click .
3. Enter the **Refund Notification** message in the text box. To check your spelling, click **Check Spelling**.


## Delete Event Registrations

Deleting a registration permanently removes the registration from the event, and the registrant is not notified via e-mail. For example, you could use this to clean up your data if someone accidentally registers for an event twice or if a staff member enters a registration by mistake.

Administrators can delete registrations if no online payments were made. If the **Payment Status** is **Refund Due**, you cannot delete the registration until the refund has been processed.

Deleting a registration cannot be reversed.

### To delete a registration

1. Point to **Events**, then click **Events Setup**.
2. In the list of events, click the **Seats Sold** value for the event.
3. For the registration you want to delete, click .
4. When the confirmation message displays, click **OK**.

## Print Event Registration Payment Details

In the Event Setup Expert, you can print a report that shows a registrant's payment breakdown. This displays the registration, supply, sub-event, and total costs, as well as the amount paid and amount due.

Payment dates, methods, amounts, and memos also display. For example, suppose you have a mission trip event that costs \$3,500 and members of the church sponsor registrants by giving money toward the trip. You can enter the sponsor's name in the memo field, and it displays so the registrant can see who donated.

### To print event payment details

1. Point to **Events**, then click **Events Setup**.
2. In the list of events, click the **Seats Sold** value for the event.
3. Find the individual whose details you want to print, then click **Amount Paid**.
4. When the Payment Details display, click **Print**.

# Registrations

The Registrations page lets you view an event's registrants along with the e-mail addresses used to register. All e-mail addresses associated with the registration display.

You can find events by month, campus, or department.

## To view a list of registrants for an event

1. Point to **Events**, then click **Registrations**.
2. Select an event name from the drop-down list. To locate your event with a filter, click **Filter Events**. Then, you can select your event's month, campus, or department to easily locate it. You can also drill down to locate all, past, future, or canceled events.
3. A list of all the registrations for the event displays. To filter registrations, use the options on the left.


You can also access the Registrations page from within the Events Setup Expert at any time by clicking the **Registrations** tab.


You can use any of the options located on the left side of the page to filter which registrants display. You can select to filter using only one option, such as Status, or mix and match the options to display, such as selecting to filter by Date Registered and Sub-Events.

As you make selections, the registrants information displayed updates automatically. To reset the selections, click **Clear All** at the bottom of the filters section.

### Available Filter Options

**Status** — Lets you select to display only registrants who meet the status requirement(s) you select. You can select one or all of the available options.

**Date Registered** — Lets you select to display only registrants who registered on the current day, or within a date range. When you select to filter by Date Range, you can enter the date in the available fields in a MM/DD/YYYY format or to select the dates from a calendar, click  beside each field.

**Date Canceled** — Lets you select to display only registrants who canceled their registrations on the current day, or within a date range. When you select to filter by Date Range, you can enter the date in the available fields in a MM/DD/YYYY format or to select the dates from a calendar, click  beside each field.

**Guest** — Lets you select to display only the Guests registered for the event. Guests can be named or unnamed. The name of the member the Guest is registered under displays along with the Guest information.

**Registration Periods** — Displays the different registration periods for the event. If available, you can select more than one registration period to filter by.

**Sub-Events** — This section only displays if the event you selected has sub-events. If available, you can select to display registrants by the sub-events they registered for.

# Copy Event Registrants to Class Rosters or Groups

With appropriate rights, you can copy an Event Registration roster to any activity group, class roster, or small group. An administrator must approve the copied roster before changes display.

Individuals already in the activity are not overwritten, and guest registrants cannot be copied to an activity group, class roster, or small group.

1. Point to **Events**, then click **Registrations**.
  2. Select the event, and, if necessary, filter the list of registrants. Select each registrant to copy. To select all of the registrants, select the check box beside **Registrant** at the top of the grid.
  3. In the **I want to** drop-down list, select **Copy to Activity Group**, and click **Go**.
  4. To locate the activity group to copy to, select the **Activity**, **Category**, and **Element(s)**.
  5. Click **Submit**.
1. Point to **Events**, then click **Registrations**.
  2. Select the event, and, if necessary, filter the list of registrants. Select each registrant to copy. To select all registrants, select the check box beside **Registrant** at the top of the grid.
  3. In the **I want to** drop-down list, select **Copy to Class Roster**, then click **Go**.
  4. To locate the class roster to copy to, select the **Master Group**, and **Class**. If necessary, also select the **Division** or **Department**, and **Position**. These may not be available depending on the way the class is set up.
  5. Click **Submit**.
1. Point to **Events**, then click **Registrations**.
  2. Select the event, and, if necessary, filter the list of registrants. Select each registrant to copy. To select all of the registrants, select the check box beside **Registrant** at the top of the grid.

3. In the **I want to** drop-down list, select **Copy to Small Group**, then click **Go**.
4. Select the small group to copy the registrants to and click **Submit**.

## Export Individuals from an Event Registration Roster

With appropriate rights, you can export individuals to an Excel spreadsheet for use outside of Access ACS.

Select the individuals you want from the list, or to select all of the individuals displayed, select the check box beside Registrants in the grid. You can also export information about individuals selecting the search filters on the Registrations page.

### To export individuals to an Excel spreadsheet

1. Point to **Events**, then click **Registrations**.
2. Select the event, and, if necessary, filter the list of registrants.
  - To select single registrants, select the check box beside the desired individual.
  - To select all of the registrants on the current page, select the check box beside **Registrant** at the top of the grid.
  - To select all registrants, select **ALL** from the **Records Per Page** drop-down menu.
3. Select **Export to Excel** from the **I want to** drop-down list, then click **Go**.

## E-mail Event Registrants

When viewing an event registration roster, you can e-mail event registrants. These e-mails can be as simple as a thank you letter for signing up for the event or a payment reminder.

When you send e-mails, all e-mail addresses associated with the registration receive the e-mail.

### To select individuals to send e-mail to

1. Point to **Events**, then click **Events Setup**.
2. On the **Event Setup Expert** tab, click the **Seats Sold** value of the desired event.
3. Select the individuals you want to e-mail.
4. Click **Send E-mail**. The Compose Message page displays.
5. To receive e-mails at a different address, enter it in the **Reply To** field. To display your name in the recipient's e-mail box in lieu of your e-mail address, enter your name in the **Friendly Name** field.
6. To use a template, click the **Default E-mail** drop-down list, select the template you want to use, then click **Apply**. The template displays in the email text box. To save an e-mail you created as a template for later use, click **Save E-mail**, enter a name for the new e-mail template, then click **OK**.
7. Enter your e-mail message's text. To insert dynamic text fields, click the **Sign In Link** drop-down list, select the field you want to insert, then click **Insert**.
8. To send your e-mail, click **Send Message**.

The individuals set to receive your e-mail message display in the **Recipients** section at the bottom of the page. Individuals who cannot receive the e-mail message display in the **Non-Recipients** section and must be contacted a different way.



# Set up and Work with Calendars

You can use the Access ACS Calendar to add and view events. If you use Facility Scheduler, the calendar displays a bit differently.

## Select Your Calendar Preference

Access ACS offers both personal calendars and community calendars.

Personal calendars are for individual users can keep to their personal events private.

Community calendars display events for your organization and are available to all users with appropriate rights.

You can set your calendar preference at any time. If you do not want to use a calendar, you can also disable both personal and community calendars.

### To select your calendar preference

1. Point to **Admin**, then click **Options**. The Global Preferences page displays.
2. In the **Calendar Preferences** section, select your calendar preference.
3. Click **Save**.

## Access ACS Calendar

With the Access ACS built-in calendar, you can add, edit, delete, and print events. New community events display as tentative events until approved by an administrator with appropriate rights. Tentative events are indicated by red text preceded by an asterisk.

- If you select the Access ACS built-in calendar, we do not recommend changing your calendar preferences from the Access ACS built-in calendar to the TMS calendar.
- If you change this preference, the system deletes all Access ACS built-in calendar information, including events, calendar types, and calendar locations.

## ACS Facility Scheduler

With ACS Facility Scheduler, you can submit events to be approved by the Events Coordinator in Facility Scheduler.

You can continue to add and edit pending events in Access ACS, however any data management for the event must be handled in Facility Scheduler.

Event Types not published in Facility Scheduler do not display in Access ACS. Access ACS Calendar Locations

Calendar locations are user-defined locations associated with your organization. When you create community events, you can assign locations to them. When users view the events, they can find out where the event is held.

For example, your organization plans to host a church picnic on the church playground. You create a calendar location named "playground." When you add the church picnic to the Access ACS built-in calendar, you assign it to the "playground" location.

Before using the Access ACS built-in calendar, you must set up your calendar locations.

1. Point to **Admin**, then click **Calendar Setup**.
2. In the **New Location** field, enter the location name.
3. Click **Save**.


## Access ACS Calendar Types

Before using the Access ACS built-in calendar, you must set up your calendar types.

With calendar types, you can establish which users have certain controls to your organization calendars. Once you set up your calendar types, you can assign them to user profiles or individual users.

Members, attendees, and group leaders can only access calendar types to which they have rights. Users with **View Only** rights to a calendar type can view events only. Users with **Full Rights** to a calendar type can view, add, edit, or delete events.

You can also assign colors to your calendar types. If you assign a color to a calendar type, events associated with the calendar type display in the selected color.

1. Point to **Admin**, then click **Calendar Setup**.
2. Click the **Calendar Types** tab.
3. In the **New Type** field, enter the calendar type name.
4. If necessary, click **Color**  and select the color that you want to assign to the calendar type.
5. Click **Save**.

# Select a Calendar Type to View

## Access ACS

You can select the specific type of calendars that display. You can only view calendars the administrator has given you rights to access. To hide the calendar filter, click **Hide Calendar Filter**. If you select multiple calendars, all of the events display on the same page.

Your Access ACS administrator can associate colors with your organization calendars. If your administrator associates colors with the calendars, the calendar name and the events display in the selected color. If an event is associated with multiple calendars, it displays in black text when you view all of the associated calendars at the same time.

### To select a calendar type to view

1. Point to **Events**, click **Calendar**, then select **Calendar View** or **Table View**.
2. Click **Select Calendar(s)** in the top left corner.
3. Select the calendars you want to view. To view all available calendars, click **Select All Calendars**.

Tentative events in the Access ACS built-in calendar display with an asterisk and in red.

## Facility Scheduler Calendar

You can select the calendars you want to display from the Calendars section. You can only view calendars you have rights to access. If you select multiple calendars, all of the events display on the same page.

To view the calendar, on the navigation bar, click **Calendar**.

## Access ACS Calendar Features

You can view calendars in two formats — Calendar and Table view. The Calendar view displays events in a calendar grid. The Table view displays events in table format. You can select a view on the navigation bar on the Calendar tab.

You can also select the calendars that you want to view. To view a calendar, you must have rights to the calendar type. For more information, see Select a Calendar Type to View.

## Calendar View

With the Calendar view, you can view events scheduled for the selected month.

From this page you can:

- Select the calendars you want to view.
- Add new community events.
- Add new personal events.
- Click a date with no scheduled events to add an event.
- Click a date with scheduled events to display the day in Table view.
- Click an event name to view, edit, or delete the details for that event.
- To print the calendar, click **Print**.

To browse the calendar for previous and following months, click the links at the top of the calendar.

## Table View

With the Table view, you can view events in table format. From this page you can:

- Select the calendars you want to view.
- Add new community events.
- Add new personal events.
- Click an event name to view the event details, edit the event details, or delete the event.
- To print a list of events for the selected month, click **Print**.
- To sort the list of events, click a column heading.

To browse the calendar for previous and following months, click the links at the top of the calendar.

# Facility Scheduler Calendar Features

Published Events created on a Published Calendar in Facility Scheduler and events you have security rights to within Facility Scheduler display on the calendar.

The Calendars pane on the left lets you select which calendars to display. You can also select **Select All Calendars** to display all calendars, or clear that option and select to display only certain calendars. Only calendars you have appropriate rights for display.

1. In the Calendars pane, click the checkmark beside the calendar with events you want to hide.
2. Click **Go**.

1. In the Calendars pane, select the check box beside the calendar with events you want to display.
2. Click **Go**.

## Calendar Display

You can view the Facility Scheduler calendar in four different formats - Month, Week, Day, and List.

The Month view displays the events for a selected month in a typical full calendar view. From this page you can:

- Select the calendars you want to view.
- Click **Add Event** to create new events.
- Click a date to view the events scheduled for that day in a list format.
- Click an event name to view event details, location information, and resource requests.
- Print the calendar.
- Click the (<) and (>) links to browse the previous and following months.

The Week view displays the events for the current week in list format. From this page you can:

- Select the calendars you want to view.
- Click **Add Event** to create new events.
- Click an event name to view event details, location information, and resource requests.
- Print the calendar.
- Click the (<) and (>) links to browse the previous and following weeks.

The Day view displays the events for the current day in a list format. From this page you can:

- Select the calendars you want to view.
- Click **Add Event** to create new events.
- Click an event name to view event details, location information, and resource requests.
- Print the calendar.
- Click the (<) and (>) links to browse the previous and following days.

The List view displays the events for the entire selected month in a list format. From this page you can:

- Select the calendars you want to view.
- Click **Add Event** to create new events.
- Click an event name to display a small window containing the event name, a description, and when and where the event occurs. To display more information about the event, click **More Details**.
- Click **Show Full Month** to display a list of all of the month's events at once.
- Print the calendar.
- Click the (<) and (>) links to view the previous and following months.

## Event Information

The basic event details for a Facility Scheduler event can be viewed directly from the calendar.

1. Locate the event on the calendar.
2. Click the event name.
3. To view more information about the event, click **View More Details**.


A small window containing the event name, a description, and when and where the event occurs displays.

To display more information about the event, click **More Details**.

# Add an Event

To add a community event, make sure **Event is for my Personal Calendar Only** is cleared. Otherwise, the event does not display on the public calendars.

## To add a community event

1. Point to **Events**, then click **Calendar**.
2. Click **Add Event**, then enter the **Event Name**.
3. Select the **Event Start Date** from the drop-down list or click  to select the date from a calendar.
4. Select the **Event Start Time** and **Event Stop Time** from the drop-down list.
5. In the **Location Information** section, enter the name of the location and any important details.
6. In the **Calendar Details** section, select a **Calendar Type** by moving selections to the right pane. You can choose up to three calendar types.
7. In the **Recurring Information** section, select the recurring schedule for your event. The default selection is **This Event does not recur**.
8. Enter any additional event information.
9. If you selected **Access ACS calendars**, click **Save** to create a tentative event and return to the View Event page. Click **Cancel** to return to Calendar View without saving the event.

If you require resources for your event, the administrator receives an e-mail that lists the resources you requested when you added your event.

# Send an Event to My Calendar

On the View Event page, you can send an iCal to your default e-mail address. An iCal allows you to share electronic calendar information.

Only certain e-mail providers support iCal. Two popular supporters include Microsoft Outlook and Apple iCal. After you receive the iCal, you may accept the event and automatically add it to your calendar.

1. On the View Event page, click **Send to My Calendar**.
2. When the message displays confirming the iCal was sent to your e-mail address, click **OK**.
3. In your e-mail application, locate the iCal e-mail message. The subject is the same as the name of the event.
4. Open the e-mail and click **Accept**. The event is added to your calendar.

# Edit an Access ACS Calendar Event

You can edit an event on the calendar if you need to.

When editing an event, you cannot change the **Recurring Information** section. To change the recurring information, you must delete the event and then add it again.

## To edit a single day event

1. On the calendar, click the event name.
2. On the View Event page, click **Edit**.
3. Make your changes, click **Save**.

## To edit a recurring event

1. On the calendar, click the event name.
2. To edit the event, click **Edit**.
3. Click **Go**.

# Delete an Access ACS Calendar Event

You can delete an Access ACS Calendar Event.

After deleting a tentative community event, you can send an event rejection notification e-mail to the event creator. If desired, enter any additional information in the **Details** field. This is included in the e-mail.

To delete the event from the calendar without sending a notification e-mail, click **Cancel**.


## To delete an event

1. On the calendar, click the event name.
2. To delete the event, click **Delete**.
3. Click **Go**.

# Set Up Event Recurrence

When an event is created, you can select it to recur at different intervals depending on your organization's needs and the type of event. For example:

- A daily coffee and devotion
- A weekly bible study or choir practice
- A monthly session or committee meeting
- A yearly autumnal festival planning meeting

1. On the Add/Edit Event page, beside **Is this a recurring event?**, select **Yes** for recurring events.
2. Select the **Event Times** from the available drop-down list, or select **All Day**.
3. Select a **Recurrence Pattern**. Depending on the option you choose, more information may be required.
4. Enter the **Range of Recurrence**. Enter a **Start** and **End** date, or click  to select the dates from a calendar. If necessary, specify the number of occurrences you want to complete before terminating the event.
5. Click **OK**.

## Making Exceptions for Recurring Dates

If you use the Facility Scheduler calendar, the Manage Dates option lets you add more dates or remove existing ones from the recurrence. This lets you vary the dates of the event beyond the available recurrence options. This is helpful if you set up a recurring Bible study and need to make an exception on a holiday.

1. Click **Preview and make exceptions for recurring dates**.
2. To add dates, click the desired date or dates. To move forward, click the (Month Year)> button in the bottom left corner of the window. Dates already included in the recurrence are bold. To remove a date, click the desired date or dates. To remove all dates, click **Clear All Dates**.
3. After you make your selections, click **OK**.

Once you make your selections from the above sections, click **OK** to save the Event Recurrence selections for the event.

### Additional Field Information

**Start and End** – Click the drop-down lists to select a beginning and ending time for the event. You can select specific times. For example, an event may start or end at 6:22 PM. When you set the start or end time, you can select **6, 2, 2**, then **PM**.

**Daily** – Select if the event occurs for multiple consecutive days. In the field, enter the number of days the event repeats.

**Weekly** – Select if the event occurs once during a set period of weeks, and the event repeats on the same day of the week as the original event. For example, if you issue payroll checks every two weeks, you can create an event for the payroll on Friday and set it to repeat every two weeks.

**Monthly** – Select if you want the event to repeat on a monthly basis. Two options are available for setting the monthly occurrence.

- **Day <num> of every <num> month(s)** - Select if the event occurs on the same date each month. For example, you create an event on June 20 and set it to repeat twice. The calendar displays the event on June 20, July 20, and August 20.
- **The <num><day> of every <num> month(s)** - Select if the event occurs on the same day of the week each month. For example, your organization schedules a meeting for the second Tuesday of each month. You can set the event to repeat on the second Tuesday of each month for a set number of occurrences.

**Yearly** – Select if you want the event to repeat on a yearly basis. Two options are available for setting the yearly occurrence.

- **Every <month> <num>** - Select if the event occurs on the same date each year. For example, your church anniversary is September 7. You can set the church anniversary event to repeat on September 7 each year for a set number of years.
- **The <num> <day> of <month>** - Select if the event repeats once each year on the same day of the week during a specified month. For example, Thanksgiving occurs on the fourth Thursday in November each year. You can set the event to repeat once each year on the fourth Thursday of November for a set number of occurrences.

**Start** – Enter the start date for the recurrence range.

**End after <num> occurrences** – Select if you want the event to end after a set number of occurrences. The Maximum event occurrences is 366.

**End by** – Select if you want the event to end after a specific date. Enter the end date in the field.

# View an Approved Event

## Access ACS Calendars

The View Event page displays information for individual events on your Access ACS calendar. From this page, you can:

- Send the event to your Microsoft Outlook calendar
- Print the event
- Return to the Calendar View
- Edit the event
- Delete the event

## Facility Scheduler

You can view a Facility Scheduler event to display important information on your Facility Scheduler calendar.

### To view an event

1. Point to **Events**, then click **Calendar**.
2. Click the event you want to view details for.
3. The event credentials display. To view more information, click **View More Details**.
4. All of the event information displays. On this page you can register for the event and edit the event.

The View More Details page displays information for an individual Facility Scheduler event. From the page you can send the event to your Microsoft Outlook calendar or edit the event.

## Event Exceptions

Event exceptions are dates that are not part of the normal event recurrence pattern. When you view the details of an event exception, \* **Contains Exceptions** displays along with the original event details.

### To view exception details

1. Click **View More Details**.
2. In the **Dates/Times** section, click the **View Exceptions** link.
3. The original event details display along with a list of the exceptions. If there are more than ten exceptions for the event, a scroll bar displays.
4. Click **Close**.

# Set up and Work with User Security

Access ACS provides four default user profiles — Member Login, Lay Leader, Organization and Staff Login. You can use these to set the security options for each user profile.

## Work with Access ACS Users

The Users page displays all users currently set up in Access ACS.

On the Users page, administrators can:

- Add new users
- Edit an existing user profile
- Delete users
- E-mail users

You do not need to add each user to Access ACS. On the Access ACS sign in page, members can register themselves as users.

## Profiles

Unless they hold a leadership position, Access ACS automatically assigns the Member Login profile to users when they register. Users with leadership positions are assigned lay leader profiles. Staff users are not automatically assigned staff profiles.

A user with appropriate rights must assign staff profiles on the Add/Edit Users page.

### To view the Users list

1. Point to **Admin**, then click **Security**.
2. Click the **Users** tab, then click the **Users** sub-tab.

You can select how many users display by selecting a number from the **Records Per Page** drop-down list. The available options are: **100**, **500**, and **All**.

When an Access ACS user name is not linked to a member record, displays beside it.

## Add Access ACS Users

While the Access ACS Member Sign In page lets members and attendees register for a user account themselves, administrators can also add new users.

You can either enter their information manually or select them from your ACS People records. We recommend selecting new users from your ACS People records. This method associates members and attendees with their ACS People record, which includes information such as classes and activities in which the individuals are enrolled and attendance markings. It also lets them access the My Overview page. If you want to assign the Member or Lay Leader profile to a user, you must select them from your ACS People records.

1. Point to **Admin**, then click **Security**.
2. On the **Users** tab, click **Add User**.
3. Under **User Information**, click **Select user from People records**.
4. Enter a **Last Name** and a **First Name/Goes By Name**. If necessary, select **Exact Match Only**.
5. Click **Run Search**.
6. Click the individual you want to add.

1. Point to **Admin**, then click **Security**.
2. On the **Users** tab, click **Add User**.
3. Under **User Information**, click **Select user from Organization records**.
4. Select an **Organization Level** and **Organization Name**. If necessary, select **Exact Match Only**.
5. Click **Run Search**.
6. Click the organization Name you want to add.
7. The organization's information displays in the appropriate fields on the Add/Edit Users page.

1. Point to **Admin**, then click **Security**.
2. On the **Users** tab, click **Add User**.
3. Under **User Information**, enter the user's contact information.
4. If necessary, in the **Note** text box, enter additional information about the user.

5. If necessary, under **User Options**, select additional options.
6. Under **User Security** Settings, in the **Assigned Profile** drop-down list, select a user profile.
7. If necessary, select **Allow user to Manage User Accounts**.
8. Click **Save**.

## Changing User Names

Sometimes, an individual may want to change his or her user name. For example, Jane Doe's user name was JaneDoe12, but she recently got married and wants to change her user name to reflect her new last name.

1. Point to **Admin**, then click **Security**.
2. In the user list, click the **User Name** of the desired individual.
3. Under **User Options**, click **Edit**.
4. Change the **User Name**, then click **Save**.

### Additional Field Information

**Disable Account** — Select to disable the user account.

**Require Password Change** — Select to require the user to change their password the first time they log in after an administrator changes the password.

**Assigned Profile** — Select the appropriate profile type for the user from the drop-down list.

**Allow user to Manage Other Users** — Select to let administrators and staff users manage other user accounts. If you select this, staff users will not have immediate rights to add or edit users. The administrator must assign the permission on an individual level.

## Linking an Access ACS user to ACS Facility Scheduler

When you add a user in Access ACS, you may want to link them to a user in ACS Facility Scheduler so they can add Event Registration events.

### To link an Access ACS user to ACS Facility Scheduler

1. Follow the steps to add the user to Access ACS.
2. If applicable, edit the user's assigned profile permissions. Under **Event Registration**, be sure the user has **Grant** rights to **Event Setup**.
3. Log into ACS Facility Scheduler as an administrator.
4. On the **Administration** tab, click **Users**.
5. Select **Logins**.
6. Double-click on the login you want to link, then select **Associate Login**.
7. Enter the individual's name, then click **Search**.
8. If you see the individual you want to link, select the record and click **OK**.
9. If you don't see the individual you want to link, click **Add New Individual** to add them.
10. Enter the individual's **First** and **Last Name**, then click **Save & Close**.

After linking the users, the username displays when **Users** is selected on the **Users** tab in ACS Facility Scheduler.

## E-mail a User

Administrators with appropriate rights can send e-mails to Access ACS users.

If you use the filter on the Users page, Access ACS only sends the e-mail to the users who meet the filter criteria.

### To e-mail users

1. Point to **Admin**, then click **Security**.
2. Click the **Users** tab.
3. Click **E-mail Users**. Your default e-mail address displays in the **Your E-mail Address** field.
4. Enter the **Subject**.
5. In the **Message** text box, enter your e-mail message, then click **Send Message**.

## Disable an Access ACS User Account

If you want to prevent someone from signing in to Access ACS without deleting them, you can disable the user accounts.

Once you disable a user account, you must clear the **Disable Account** option to let the user sign in to Access ACS.



### To disable a user account

1. Point to **Admin**, then click **Security**.
2. Select the **Users** tab.
3. On the **Users** tab, click the user account you want to disable.
4. Under **User Options**, click **Edit**.
5. On the Add/Edit Users page, select **Disable Account**.
6. Click **Save**.

## Assign a New User Profile to an Existing User

Administrators with appropriate rights can change the user profiles that are assigned to existing users. For more information about user profiles, see User Profile Types.

### To assign a new user profile

1. Point to **Admin**, then click **Security**.
2. Make sure **Users** is selected.
3. On the **Users** tab, click the user account you want to change.
4. Under **User Security Settings**, select the new user profile from the **Assigned Profile** drop-down menu.
5. Click **Save**.

## Add Guest Users to Access ACS

### Potential Matches

If there are potential matches for the guest user in your database, the **View Matches** button displays on the **Guest Users** tab in the Guest User row.

If you click **View Matches**, a list of potential merge matches from your database displays. This list includes the name of the potential match, the family position, address, e-mail address, and the match percentage for the record.

If none of the potential matches are the one you are looking for, you can locate an individual in your ACS database to merge with the Guest User. To locate an individual to merge the Guest User with, enter a **Last Name** and **First Name**, then click **Run Search**.

To create an entirely new record for the individual, click **Add as new Record**.

### No Potential Matches

If there are no potential matches for the guest user in your database, you can do one of the following:

- Enter a **Last Name** and **First Name**, then click **Run Search** to use the search function to locate a record to merge the guest user with.
- To create an entirely new record for the individual, click **Add as new Record**.
- To return to the list of Guest Users, click **Return to Guest Users**.

### No Matches?

If no suitable matches display and you can't locate one using the **Run Search** feature, you have can do one of the following:

- To create an entirely new record for the individual, click **Add as new Record**.
- To return to the list of Guest Users, click **Return to Guest Users**.

### Potential Matches

If there are potential matches for the guest user in your database, the **View Matches** button displays on the **Guest Users** tab in the Guest User row.

If you click **View Matches**, a list of potential merge matches from your database displays. This list includes the name of the potential match, the family position, address, e-mail address, and the match percentage for the record.

If none of the potential matches are the one you are looking for, you can locate an individual in your ACS database to merge with the Guest User. To locate an individual to merge the Guest User with, enter a **Last Name** and **First Name**, then click **Run Search**.

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- Enter a **Last Name** and **First Name**, then click **Run Search** to use the search function to locate a record to merge the guest user with.
- To create an entirely new record for the individual, click **Add as new Record**.
- To return to the list of Guest Users, click **Return to Guest Users**.

## No Matches?

If no suitable matches display and you can't locate one using the **Run Search** feature, you can do one of the following:

- To create an entirely new record for the individual, click **Add as new Record**.
- To return to the list of Guest Users, click **Return to Guest Users**.

When copying registrants from an event to an activity, class, or small group, you can only copy those individuals with records in your system. Guests cannot be copied and will not be included in the roster you copy to.

However, you can convert guest records in your database by adding the guest record to ACS, then linking the record with an established family or individual record, or create a new record. Use the newly added user record for your group purposes.

Guests that are registered by members are not considered guest users and cannot be added to the database through the Add to ACS process.

1. Point to **Admin**, then click **Security**.
2. On the **Users** tab, select the **Guest Users** sub-tab.
3. Search for the individual by entering a full name in the search box, then click **Go**. You can also scroll through the list to locate the individual you want to add.
4. After you locate the individual, in the right side of the row, click **Add to ACS**.
5. Select **Add to the database as a new family**, then click **Next**.
6. Make sure the required information is entered and correct, then click **Submit**.

The record displays after an administrator approves it.

When using this option, remember that you must enter the head of household before adding any subsequent family members.

1. Point to **Admin**, then click **Security**.
2. On the **Users** tab, select the **Guest Users** sub-tab.
3. Search for the individual by entering a full name in the search box, then click **Go**. You can also scroll through the list to locate the individual you want to add.
4. After you locate the individual, in the right side of the row, click **Add to ACS**.
5. Select **Add to an existing family**, then click **Next**.
6. Enter the **Last Name** and **First Name /Goes By Name** you want, then click **Run Search**.
7. Click the **Name** of the family you want to add the guest user to.
8. Make sure all of the required information is entered and correct and click **Submit**.

The record displays after an administrator approves it.

1. Point to **Admin**, then click **Security**.
2. On the **Users** tab, select the **Guest Users** sub-tab.
3. Search for the individual by entering a full name in the search box, then click **Go**. You can also scroll through the list to locate the individual you want to add.
4. After you locate the individual, in the right side of the row, click **Add to ACS**.
5. Select **Link to an individual in the database**, then click **Next**.
6. Enter the **Last Name** and **First Name /Goes By Name** you want, then click **Run Search**.
7. Click the **Name** of the family you want to add the guest user to.
8. Follow the onscreen instructions to compare the two records before merging, then click **Yes**.

The record displays after an administrator approves it.

Useful Information

- On the activity, class, or small group selections page, the total number of guest registrants displays in the right corner of the Individuals to copy to the selected group(s) grid.
- The total number of registrants included in the individuals you selected to copy displays next to the **Guest Registrant(s) found** link.
- To display a pop-up menu containing a list of the guest registrants names and available e-mail addresses, click **Guest Registrant(s) found**. To e-mail yourself a copy of the list, click **E-mail Me This Information**.
- **#Logins** displays the number of times the guest user has logged into Access ACS. **# Events** displays the number of events the guest user has registered himself for, and **# Gifts** displays the number of gifts the guest has given.

# Unlock a User Account

Access ACS locks accounts after five unsuccessful login attempts. The lock is automatically removed after five minutes from the time it is locked.

A lock symbol displays beside the name of the account that is locked. The symbol displays until after the first time a user logs in after the account has been unlocked.

A system administrator can remove the lock at any time in the hour the account is locked.

## To unlock a user account

1. Point to **Admin**, then click **Security**. The Users page displays.
2. Click the user name that you want to unlock.
3. Click **Account Locked (Click to Unlock)**.

The account is now successfully unlocked, and the Locked icon does not display. When you return to the user grid, the lock is removed from the account.

# View Users and their Profiles

Administrators with appropriate rights can view information about other Access ACS users on the Add/Edit Users page.

## To view user account information

1. Point to **Admin**, then click **Security**.
2. Select **Users**.
3. On the Users page, click the user account that you want to view.

# Filter Users and their Profiles

Administrators can filter users and their profiles.

## To view the users list

1. Point to **Admin**, then click **Security**.
2. Click the **Users** tab.
3. Click the **Users, Guest Users, or FS Users** sub-tab.

## Users

Enter a **User Name**, **Full Name**, or select a **Profile Name** or **Profile Type**, then click **Go** to filter the users. To include in the search users who are no longer active, select the **Include Inactive Users** option. A **D** displays in the grid beside the users who are inactive.

On this tab you can add new users, e-mail users, delete user information, export the grid, or print a list of users.

## Guest Users

Guest users are not in the database, but have given or registered for an event.

Enter the **Full Name** of the guest you want to search for, then click **Go**.

- To only display potential matches for your search, select **Show Potential Matches Only**.
- To include inactive guest logins, select **Include Inactive Users**. A **D** displays in the grid beside the users who are inactive.

You can select how many users display by selecting a number from the **Records Per Page** drop-down list. The available options are: **50**, **100**, and **500**.

If a Guest User matches a record already in your database, a **View Matches** button displays for the entry. To view the potential matches and merge the records, click **View Matches**. For more information about merging users, see Filter Users and their Profiles.

To link a user to your database, click **Add to ACS**. You can select to:


- **Add as a new family** – Select this option to create a brand new family record for the guest user. For more information about this process, see Filter Users and their Profiles.
- **Add to an existing family** – Select this option to select an existing family record in your database to link the guest user to. For more information on this process, see Filter Users and their Profiles
- **Merge with an existing individual** – Select this option to select an existing individual record to merge the guest user information with. For more information on this process, see Filter Users and their Profiles.

You can also e-mail a guest user, delete guest user information, export the grid of guest users, and print the grid of guest users.

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## FS Users

Use this tab to search for ACS Facility Scheduler users. Enter a **User Name**, then click **Go**.

1. Point to **Admin**, then click **Security**.
2. Click the **FS Users** subtab.
3. Enter a **User Name**, then click **Go**. Or locate the Other User manually.
4. Click  for the ACS Facility Scheduler User to link.
5. Click **Select user from People records**.
6. Enter the **Last Name** and **First Name/Goes By Name** for the individual to link to, then click **Run Search**.
7. Click the **Name** of the individual.
8. Make sure the user information supplied is correct, then click **Save**.

## Export Access ACS Users

You can export the Access ACS Users List.

### To export the users list

1. Point to **Admin**, then click **Security**.
2. Click the **Users** tab.
3. Click the **Users, Guest Users, or Other Users** sub-tab.
4. When the list displays, click **Export Grid**.
5. Select to open the file with a default program, or select to save the file to your computer.
6. Click **OK**.

## Work with User Profiles

User profiles are sets of security rights assigned to Access ACS users to establish what they can access.

When you add users, you must assign each user a user profile. A user profile must be assigned to all users except System Administrators.

Security rights for functions are based on granting and denying rights. Security rights for data are based on full rights, view only rights, and no rights. Access ACS has several default user profiles — Staff Login, Lay Leader, Organization Login, and Member Login. Users with appropriate rights can add and edit all user profiles.

You can delete the user profiles that you create. You cannot delete the default user profiles.

The Organization Login option and any profile you create using the Organization profile option only display if organizations are uploaded to your site.

We recommend creating a user profile suitable for the majority of your staff users, lay leader users, and member users. You can customize user profiles for individual users if special conditions exist for them, and you can create as many user profiles as you want.

## User Profile Types

Access ACS lets you keep your ACS records and information secure by limiting the areas your members and attendees can access. User profiles are sets of security rights and permissions assigned to users.

Except for system administrators, everyone in Access ACS must be assigned a user profile. The Access ACS default user profiles are **Member Login, Lay Leader Login, Organization Login, and Staff Login**.

System administrators can set up and maintain Access ACS. Some administrative tasks include:

- Managing Access ACS users
- Setting user profiles
- Uploading ACS records to Access ACS
- Setting up your Global Preferences
- Signing up for new Access ACS features

Staff Login users can access the **Admin** tab and complete administrative duties. However, system administrators can customize the Staff Login user profile to control the areas that staff users can access. A system administrator must assign Staff Login profiles. Information. Organization Login users can access and manage their staff and profiles. With the appropriate security rights, Organizations can also give online.

Lay Leader users manage members in the classes and activities in which they hold a leadership position. This user profile lets them manage the groups that they lead. To learn more, see Lay Leader Profile Information.

Member Login users can access individual profiles for themselves and their family members, maintain a personal calendar, and report problems to the administrator. When users register, Access ACS assigns them the Member Login user profile unless they hold a leadership position. To learn more, see Member Profile Information. Guest Users can access My Event Registrations.

## Add a User Profile

User profiles are sets of security rights and permissions that establish the areas users can access. All users except system administrators must be assigned a user profile. Access ACS provides four default user profiles:

- User Profile Permissions – Member Login
- User Profile Permissions – Lay Leader Login
- User Profile Permissions – Organization Login
- User Profile Permissions – Staff Login

If necessary, users with the appropriate rights can create new user profiles to fit the needs of your organization. For example, if members of your organization frequently volunteer in your church office, you can create a new user profile for volunteers and assign it to all users who volunteer in the office.

1. Point to **Admin**, then click **Security**.
2. Click the **User Profiles** tab.
3. Click **Add New Profile**.
4. In the **Name** field, enter the name of the user profile.
5. If necessary, enter a **Description** of the user profile.
6. In the **Profile Type** drop-down list, select the type of profile that you want to create.
7. To continue to the next step, click **Next**.

## Naming and Describing a User Profile

Although you can customize the security rights and permissions for the new user profile, you must base the new profile on a default Access ACS profile. You can customize the security rights and permissions later in the process.

1. Enter the **Name** of the profile.
2. If necessary, enter a **Description**.
3. In the **Profile Type** drop down list, select the type of user profile that you want to create.
4. To continue to the next step, click **Next**.

## Setting Function Permissions for a User Profile

After you name the new user profile and select the user profile type, you must select the user profile function permissions. Function permissions determine which actions users can perform while working in Access ACS. While these are defaults, you can also customize a specific person's permissions.

1. Under **User Profile Function Permissions**, select one of the following options for each function: **Grant Rights** or **Deny Rights**
2. Select each individual function you want to grant or deny access to. Or, you can click **Select All** in either column and automatically mark every function permission.
3. To continue to the next step, click **Next**.

## Setting Data Permissions for a User Profile

After you set the function permissions, you must select the data permissions for the user profile. Data permissions determine what information users can access while working in Access ACS.

1. Under **User Profile Data Permissions**, select one of the following options for each data permission:
  - **Full Rights**
  - **View**
  - **None**
2. Select the specific data you want to grant rights to. Or, you can click **Select All** in any of the columns and automatically mark specific access for each.
3. Click **Save**.

## Edit a User Profile

Administrators with appropriate rights can edit existing user profiles to meet the needs of your organization. If you edit a user profile, the changes apply to all users who are assigned the user profile.

For more information about the security options for each user profile, see:


- Member Login
- Lay Leader Login
- Organization Login
- Staff Login

### To edit a user profile

1. Point to **Admin**, then click **Security**.
2. Click the **User Profiles** tab.
3. Click a profile name.
4. Edit the settings, then click **Save**


## Copy a User Profile

Administrators can copy a user profile.

After you click **Copy this Profile** , the Copying User Profile page displays. The **User Profile Name** displays as **Copy of <userprofile>**. You can edit the user profile name or keep the default name.

You can edit the copied user profile information as you would a normal user profile. For more information on editing user profiles, see [Editing a User](#)

### Profile. To copy a user profile


1. Point to **Admin**, then click **Security**.
2. Click the **User Profiles** tab.
3. Locate the user profile you want to copy and click **Copy this Profile** 

## Delete User Accounts

Administrators with appropriate rights can delete users from Access ACS.

Once you delete users, they cannot sign in to Access ACS. To prevent users from signing in without deleting them from Access ACS, you can disable the user accounts. The users remains in Access ACS, but they cannot sign in. For more information, see [Disable an Access ACS User Account](#). **To**

### delete a user

1. Point to **Admin**, then click **Security**.
2. Click the **Users** tab.
3. Beside the user account that you want to remove, click **Delete** 

# Leadership Positions

Leadership positions let you grant your lay leader users additional rights. When a member user with a lay leader profile signs in, leadership positions are used to determine the groups for which the user is a lay leader.

Leadership positions are linked to the positions and elements that you set up for classes and activities in your ACS database. Your Access ACS leadership positions must be the same as those in your ACS database. If you set up a "Teacher" leadership position in ACS, you must also set up a "Teacher" position in Access ACS.

For example, Dylan Parker is the Outreach Leader for the Teen Sunday School class. In ACS People, Mr. Parker is associated with the Outreach Leader position. In Access ACS, the administrator creates an Outreach Leader position.

When Mr. Parker registers with Access ACS, the system recognizes that he has a leadership position and gives him a lay leader profile. This lets him view any individual's record in his class. He cannot access other records unless he has a leadership position for another activity or class.

Note: Your Access ACS leadership positions must be identical to your ACS positions. If you misspell a position name in ACS, you must also misspell it in Access ACS.

1. Point to **Admin**, then click **Security**.
2. Click the **Leadership Positions** tab.
3. In the **New Position** field, enter the new position name.
4. Click **Save**. Leadership Positions and Taking Attendance in Access ACS

If you plan to use leadership positions to take attendance in Access ACS, set up your activity elements and enter your positions in Element 3 (Leader, Teacher, Coordinator).

On the **Leadership Positions** tab, add the leadership positions that match Element 3 (Leader, Teacher, Coordinator).

Once the activity group is uploaded, you can take attendance in Access ACS.

# Leadership Positions and Activities

When using Leadership positions in combination with Activities, they operate slightly different. Element 1 represents the roster level therefore the system filters it on Element 1.

Individual	Element 1	Element 2	Element 3
Person 1	Active	Male	Leader
Person 2	Active	Female	Member
Person 3	Active	Female	Member
Person 4	Inactive	Male	Member
Person 5	Inactive	Male	Leader
Person 6	Active	Female	Member

The system searches all elements for "Leader". Once found, it qualifies that person as a leader of the group, but then the system must determine what group the leader belongs to. To do this, the system then looks at the Element 1 field. This field is considered the beginning "Roster" field because you cannot have an Element 2 without an Element 1. So, after searching the list provided in Figure 1, the following information will show who qualifies as a leader and who would be placed within their groups.

Person 1 qualifies as a Leader because in Element 3 they are registered as "Leader" which is the Leadership Position we have entered in Access ACS, and their group would consist of:

- Person 1
- Person 2
- Person 3
- Person 6

The Persons 1, 2, 3, and 6 would be in the same group (Roster) because they share the same Element 1 of "Active".

Person 2, 3, and 6 does not qualify as a Leader because they are not registered as "Leader" in any of their elements but are part of the Roster for Element 1 "Active".

Person 4 and 5 will also be in the same Element group (Roster) because they share the same Element 1 of "Inactive" but Person 5 would be the Leader due to Person 5 being registered as "Leader" in Element 3.

When the system located "Leader" in Element 3, it qualified the person as a leader. Then it checks Element 1 to determine the group they belong to, to be able to form the list according other people who have the same Element 1.

The system would search all elements for "Female". Once found it would qualify that person as a leader of the group, but then the system must determine what group the leader belongs to. To do this, the system then looks at the Element 1 field. This field is considered the beginning "Roster" field because you cannot have an Element 2 without an Element 1. So therefore, after searching the list provided in Figure 1, the following will show who qualifies as a leader, and who would be placed within their groups.

Person 1, 3, and 6 qualifies as a Leader because in Element 2 that are registered as "Female" which is the Leadership Position we have entered in Access ACS, and their group would consist of:

- Person 1
- Person 2
- Person 3
- Person 6

The Persons 1, 2, 3, and 6 would be in the group (Roster) because they share the same Element 1 of "Active".

Person 1 does not qualify a a Leader because they are not registered as "Female" in any of their elements but are part of the Roster for Element 1 "Active".

Person 4 and 5 will also be in the same group (Roster) because they share the same Element 1 of "Inactive" but because neither have the Element of Female they both would be considered Members and neither would be a Leader of the Group (Roster).

When the system located "Female" in Element 3, it qualified the person as a leader. Then it checks Element 1 to determine the group they belong to, to be able to form the list according other people who have the same Element 1.

The system would search all elements for "Active". Once found it would qualify that person as a leader of the group, but then the system must determine what group the leader belongs to. To do this, the system then looks at the Element 1 field. This field is considered the beginning "Roster" field because you cannot have an Element 2 without an Element 1. So therefore, after searching the list provided in Figure 1, the following information will show who qualifies as a leader, and who would be placed within their groups.

Person 1, 2, 3, and 6 qualifies as a Leader because in Element 1 they are registered as "Active" which is the Leadership Position we have entered in Access ACS, and their group would consist of:

- Person 1
- Person 2
- Person 3
- Person 6

The persons 1, 2, 3, and 6 would be in the same group (Roster) because they share the same Element 1 of "Active".

Person 4 and 5 will also be in the same group (Roster) because they share the same Element 1 of "Inactive" but because neither have the Element of "Active" they both would be considered Members and neither would be a Leader of the Group (Roster).

When the system located "Active" in Element 1, it qualified as a leader. Then it checks Element 1 to determine the group they belong to, to be able to form the list according other people who have the same Element 1.

Use caution when you use Element 1 to determine the Leadership Position, because it can produce undesirable results when displaying your list, if you are the only leader of a class, and in Element 1 you put that Leader, but for everyone else you have Member then you are not going to see anyone but yourself. This will occur because Element 1 is the roster/group. Therefore you would only see the people who have the same Element 1 as yourself, and if you are the only one, then you will see a group of just yourself.

The system is going to search any Element field to match any of the Leadership positions in the Administration portion of Access ACS. If they do match then that person becomes a Lay Leader of the group. They in turn would then have the ability to see anyone who matches the same Element 1 field, as the leader himself.

## Leadership Positions and Taking Attendance

You can use leadership positions to take attendance in Access ACS.

To do this, set up your elements as above, with the positions in Element 3 (Leader, Teacher, Coordinator). Then, on the Leadership Positions tab in Access ACS, add the leadership position that matches what's in Element 3 (Leader, Teacher, Coordinator).

Once the activity group is uploaded, you can take attendance in Access ACS.



# Set Password Preferences

## Setting Password Expiration

Administrators with appropriate rights can set password expiration for user accounts. If you set up this option, Access ACS users must periodically create new passwords.

1. Point to **Admin**, click **Security**, and select **Users**.
2. On the Users page, click the user account for which you want to set password expiration.
3. Under **User Options**, click **Edit**.
4. Select **Require password change**.
5. In the **Set Number of Days** field, enter the number of days before the password expires. For example, if you want the password to expire every 30 days, type **30** in the field.
6. Click **Save**.

## Setting Password Strength Requirements

You can change the password strength requirements for the organization. By default, password strength is set to level 3 (Average).

Password strength ranges from level 0 (minimal requirements) to level 4 (multiple requirements).

1. Point to **Admin**, then click **Security**.
2. Click the **Security Preferences** tab.
3. Under **Password Strength Requirements**, select the strength level from the drop-down list.
4. Click **Save**.

## Password Strength Requirement Levels

**Level 0** — The lowest level of password security. The password must be between 5 and 15 characters long, and can match part of the user name or email address.

**Level 1** — At this level, the password must be between 5 and 15 characters long. It can contain a sequence of consecutive (123456) or repeated (111111) characters.

**Level 2** — At this level, the password must be between 6 and 15 characters long. It cannot contain a sequence of consecutive (123456) or repeated (111111) characters.

**Level 3** — At this level, the password must be between 6 and 15 characters long. It cannot contain a sequence of consecutive (123456) or repeated (111111) characters. It must include one of the following conditions: at least 2 letters and 2 numbers, a symbol, or a total of at least 8 characters. This is the default password strength level activated during initial setup.

**Level 4** — At this level, the password must be between 6 and 15 characters long. It cannot contain a sequence of consecutive (123456) or repeated (111111) characters. It must include two of the following conditions: at least 2 letters and 2 numbers, a symbol, or a total of at least 8 characters.

## Setting up Password Reuse Requirements

You can also limit the number of previous passwords that can be reused for log in. By default, the limit is set to 6. Password reuse can be set to **0, no limit, up to 10, track 10 previous passwords**.

1. Point to **Admin**, then click **Security**.
2. Click the **Security Preferences** tab.
3. Under **Saved Passwords**, select the number of previous passwords you want to limit in the drop-down list.
4. Click **Save**.

# Work with Records

As an Access ACS administrator, you can upload records from ACS People Suite. You can customize the type of information uploaded into Access ACS.

ACS 11.3 or higher must be installed to upload records to Access ACS, and you must be working on a computer with ACS installed to upload records.

Before uploading your records, close ACS for Windows and make sure your firewall settings allow data transfers.

## Upload ACS People Records

With Access ACS, you can view and manage your ACS People records from any location with an Internet connection. To access your records, you must upload them to Access ACS. You can customize the information and records to upload.

When you log into Access ACS for the first time, you must upload records in ACS People Suite before you can continue setting up Access ACS.

### To upload your records in ACS People Suite

1. Log into ACS People Suite.
2. Under **Advanced Tools**, select the **Admin Utilities** tab.
3. In the drop-down list, select **Sync with Access ACS** and click **Go**.
4. Select the information you want to upload.
5. Click **Upload**.



If you receive a security warning for WebExpX.ocx, click **Install**. The file does not harm your computer or interfere with other software.

## Determine How Often to Upload

Here are some examples of situations to help you determine how often you should apply change requests and upload change requests and small groups.

In the first situation, your organization operates within the following parameters:

- ACS People is the only source of entry for your information.
- Access ACS is used for viewing purposes only.
- You are not currently using Small Groups.
- You have added new information such as individuals, attendance, and contributions.

You should perform an upload at least once a week unless you make changes frequently, then you should be uploading more than once a week or even once a day. You can set up Access ACS to run an upload for multiple days. For more information about setting up uploads, see [Uploading Your ACS Records](#).

In the second situation, your organization operates within the following parameters:

- Access ACS is updated more frequently than ACS People.
- Small Groups is not currently in use.
- You have added new information such as individuals, new families, connections, and attendance.

You should review and apply any change requests daily. You should perform an upload at least once a week unless you make changes frequently, then you should be uploading more than once a week or even once a day. You can set up Access ACS to run an upload for multiple days. For more information about setting up uploads, see [Uploading Your ACS Records](#).

In the third situation, your organization operates within the following parameters:

- Access ACS is updated more frequently than ACS People.
- Small Groups is in use.
- You have added new information such as individuals, new families, connections, and attendance.
- You have made any of the following changes in Small Groups: create/modify groups, change roster, or mark attendance.

You should review and apply change requests daily. You should perform an upload at least once a week unless you make changes frequently, then you should upload more than once a week or even once a day. You can set up Access ACS to run an upload for multiple days. For more information about setting up uploads, see [Uploading Your ACS Records](#).

Small Groups in ACS People needs to be updated. To update Small Groups, click **Maintain** or **Update** in the Group Setup window. For more information, see [Small Groups](#).

In the fourth situation, your organization operates within the following parameters:

- ACS People is the only source of entry for your information.
- Access ACS is used for viewing purposes only.
- Small Groups is used within Access ACS.
- You have made any of the following changes in Small Groups: create/modify groups, change roster, or mark attendance.

You should perform an upload at least once a week unless you make changes frequently, then you should upload more than once a week or even once a day. You can set up Access ACS to run an upload for multiple days. For more information about setting up uploads, see [Uploading Your ACS Records](#).

Small Groups in ACS People needs to be updated. To update Small Groups, click **Maintain** or **Update** in the Group Setup window. For more information, see [Small Groups](#).

In the fifth situation, your organization operates within the following parameters:

- Both Access ACS and ACS People are used for adding and editing information.
- You have added new information such as individuals, attendance, and contributions in Access ACS and ACS People.
- Small Groups are not currently being used.

You should review and apply change requests daily. You should perform an upload at least once a week unless you make changes frequently, then you should upload more than once a week or even once a day. You can set up Access ACS to run an upload for multiple days. For more information about setting up uploads, see [Uploading Your ACS Records](#).

In the sixth situation, your organization operates within the following parameters:

- Both Access ACS and ACS People are used for adding and editing information.
- Small Groups are used.
- You have added new information such as individuals, attendance, and contributions in Access ACS and ACS People.
- You have made any of the following changes in Small Groups: create/modify groups, change roster, or mark attendance.

You should review and apply change requests daily. You should perform an upload at least once a week unless you make changes frequently, then you should upload more than once a week or even once a day. You can set up Access ACS to run an upload for multiple days. For more information about setting up uploads, see [Uploading Your ACS Records](#).

Small Groups in ACS People needs to be updated. To update Small Groups, click **Maintain** or **Update** in the Group Setup window. For more information, see [Small Groups](#).

Change Requests must be completed before you attempt an upload. This makes sure you are uploading the most up-to-date and accurate information between your applications.

## Customize Your Upload

Access ACS lets you select the information and records you upload.


If you do not want to maintain all of your ACS records and information in Access ACS, you can choose the information you want to make available. For example, you only want to upload records for your organization members. In ACS, you can search for member records and then upload your search results to Access ACS.

The following table provides examples of how you can customize your upload.

Problem	Example	Solution
You do not want to upload all available information.	You want to upload classes, but not activities.	On the ACS for Windows Export dialog box, select the information you want to upload.
You do not want to upload all of your ACS People records.	You only want to upload records for members of your organization, not prospects.	You can upload ACS People search results or filter results.
You want to upload specific fields.	You only want to upload certain activity groups.	Select the fields that you want to upload.

## Uploading ACS Options

To upload all ACS records, use the default selections on the ACS for Windows Export dialog box. If you want to select the information you want to upload, there are options in the ACS for Windows Export dialog box you can select. For other ways to customize an ACS upload:

1. In ACS People, run and save a search.
2. On the **ACS for Windows Export** dialog box, select **Use Search Results**.
1. Filter your records in ACS People.
2. On the **ACS for Windows Export** dialog box, select **Use Filter Results**.
1. In the **ACS for Windows Export** dialog box, beside the option that you want to customize, click **Select**.
2. In the **Select** dialog box, select a field that you want to upload.
3. Click the **Move Right**  button. The selection moves to the right pane. To select multiple fields, repeat steps 2 and 3.
4. Click **OK**.
5. In the **ACS for Windows Export** dialog box, click **Upload**. When the upload is complete, the Update Log displays.

# Schedule Uploads

OnDemand Clients

The steps below are for Access ACS clients with ACS for Windows installed locally or on a network.

If your church uses ACS OnDemand, see Scheduling Tasks to learn more about scheduling uploads.

When you schedule an upload, Access ACS uploads your ACS data at the time that you select. With this feature, you can schedule uploads to run when you are away from the office so they do not interfere with your productivity.

For Windows to run the scheduled upload, your computer must be turned on. You should also run the process with highest privileges.

When Access ACS performs a scheduled upload, it uses the upload options that you selected for the previous manual upload. If you want to change what information you want to upload, you must first perform a manual upload. Once the manual upload is complete, all scheduled uploads will use these settings. If you are updating search results, you must rerun searches.

Once a scheduled upload begins, you cannot customize it. To verify that your scheduled upload occurred, view the **Update Log**.

1. On the Windows taskbar, click **Start > Control Panel**.
2. Under **Administrative Tools**, select **Task Scheduler**.
3. Under **Actions** (on the right), select **Create Basic Task**.
4. Enter the name of the task (For example, **Access ACS Schedule Upload**), then click **Next**.
5. Select the **Trigger** for the event and click **Next**.
6. Select the date and time for the task to run, then click **Next**.
7. Select **Start a program** for the task, then click **Next**.
8. The Program/Script command should read **C:\WINACSAACSEXP\acsexport.exe**. (or, you can click **Browse** to select this).
9. At the **Add arguments** command, enter **-autorun** and click **Next**.
10. Select **Open the Properties dialog for this task when I click Finish** (This lets you change the settings) and click **Finish**.
11. In the Task Properties window, select **Run whether user is logged on or not**. Click **OK**.
12. If you use Windows Server 2008 R2, select **Run with Highest Privileges**. This lets the acsexport process upload data.
13. Enter your Windows network user name and password, then click **OK**.

On the **Settings** tab, **Stop the task if it runs for 72 hours and 0 minutes** is selected by default.

Since Windows does not start one task if the previous one is already running, we recommend setting this option to 4 hours on any Windows install.

## Locking your Workstation


You may find you have to leave your workstation computer while an upload runs. If you have to do that, we highly recommend you lock the computer instead of signing off. This ensures all network connections are still intact and the upload will complete correctly.

1. On the keyboard, press **CTRL + ALT + Delete** at the same time.
2. Click **Lock Computer**.

## Upload Tax Statements

You can view and print official tax statements online.

The administrator must prepare the tax statements in ACS People Suite and sync with Access ACS before statements are available to members and attendees.

1. Under **Searches and Reports**, click the **Reports** tab.
2. Select **Contributions Reports** in the drop-down list, and click **Go** .
3. Expand **Extracts**, then select **Access ACS Plain Paper Statement Extract**.
  4. In the lower sidebar, select the date range you want to extract gifts for, then click **Customize**. We recommend you select the **Ignore Send Statement Flag**. This ensures the everyone who has contributions is uploaded to Access ACS, and not just the few who have e-mail and mail flags enabled.
5. On the **Report Options** tab, make any applicable selections, then click **Extract**.
6. A message displays confirming the export is complete and asking if you want to print a report listing records without e-mail addresses. Click **Yes** to print a list of invalid e-mail addresses or **No** to continue without printing.


# Process Change Requests and Upload Records in ACS

Change requests let members and attendees enter and update information in Access ACS while letting administrators maintain control over their ACS People records.


A change request is created when members and attendees change individual records, enter class, activity, worship attendance, or add individuals to rosters or to the ACS database. Before the changes display in Access ACS or ACS People, an administrator with appropriate rights must approve them.

You must process change requests and upload records in ACS People Suite.

## To upload records in ACS People Suite

1. Log into ACS People Suite.
2. Under Advanced Tools, click on the **Admin Utilities** tab.
3. In the drop-down list, select **Sync with Access ACS**, and click **Go** .
4. If this is your first time uploading records, select **I accept the Terms of Use**.
5. Click **Continue**.

## To review and apply change requests in ACS People Suite

1. Log into ACS People Suite.
2. Under Advanced Tools, click on the **Admin Utilities** tab.
3. In the drop-down list, select **Sync with Access ACS**, and click **Go** .
4. To apply all change requests, under **Change Requests**, click **Overview**. Then, click **Apply All Change Requests**.
5. To review and apply change requests, click on the tab you want to review. Select the change requests to apply, then click **Apply**.

# Set Up Change Request Preferences

Access ACS can send change request e-mails when members enter changes.

You can add individuals to receive change request e-mails and customize the change request preferences for your organization. You can also send change request rejection e-mails when you reject change requests.

You can choose how frequently change request e-mails are sent, choose to send change request rejection e-mails to members and attendees, and customize the rejection e-mail's text.

1. Point to **Admin**, then click **Options**.
2. Click on the **Change Request Setup** tab.
3. Click **Add**.
4. Click the **Login Name** of the individual you want to add.
5. Select the **Change Request E-mail** and **Change Request Rejection E-mail** preferences for the individual.
6. Enter a message in the **Rejection E-mail** text box, then click **Save**.

1. Point to **Admin**, then click **Options**.
2. Click on the **Change Request Setup** tab.
3. Locate your name in the **Change Request Setup** grid, then click **Edit** .
4. Under **Change Request E-mails**, select an option. You can choose to receive an e-mail each time a change request is created, once per day, once per week, or never. We recommend receiving change request e-mails at least daily.
5. In the **E-mail address to use** field, enter the e-mail address where the e-mails are sent, then click **Save**.

### Change Request E-mails

- Do not notify if I have Change Requests
- Send me an e-mail notification for each Change Request
- Send me an e-mail notification daily if I have new Change Requests
- Send me an e-mail notification weekly if I have outstanding Change Requests

E-mail address to use:

admin@yourchurch.org

6. To send change request rejection e-mails, under **Change Request Rejection E-mails**, select **Send Rejection E-mails**.
7. Under **Rejection E-mail**, in the **Message** text box, enter a custom e-mail message.
8. Click **Save**.

**Change Request Rejection E-mails**


Send Rejection E-mails (Causes an e-mail to be sent to the user whenever the administrator rejects a change request.)

**Rejection E-mail**

Enter the reason in the message box below and click the Save button. If the Send Rejection E-mail flag is turned on then the following message will be sent to the user who entered the Change Request.

**Message:**

Your request was not approved. For more information, contact your system administrator.

1. Point to **Admin**, then click **Options**.
2. Click the **Change Request Setup** tab.
3. Locate the individual you want to delete, then click **Delete**  in the individual's row.

## Work with Themes

You can customize the look and feel of Access ACS. Use the options on the **Themes** tab to blend the Access ACS program with the style of your website.

To access the Themes page, point to **Admin**, then click **Options**.

Select one of our pre-existing themes. Preview the changes in the preview window; to apply the changes to your program, click **Apply**. Click **Default** at any time to restore the Access ACS default theme.

You can customize a theme for your website in Access ACS. Click **Customize** to create your own theme.



You can customize much of your Access ACS website to your tastes. Selecting your organization's logo is one option you can customize.

### To select a logo to display on the Web site

1. Point to **Admin**, then click **Options**.
2. Click the **Themes** tab.
3. On the Themes page, click **Customize**, then click **Select Logo**.
4. To locate your custom logo, click **Browse**.
5. To see how your logo will look in the Access ACS program, click **Preview**.
6. In the **Logo Link** field, enter your website's URL to make the logo a link to your website.
7. Click **Apply** to add your custom logo, or click **Cancel** to exit. If you do not like the look of your custom logo, click **Reset Logo** to restore the default Access ACS logo.


When theming Access ACS, you can select a background color for your Access ACS site.

### To customize the Web site background

1. Point to **Admin**, then click **Options**.
2. Click the **Themes** tab.
3. On the Themes page, click **Customize**, then click **Select Background**.
4. To locate your custom background, click **Browse**.
5. Select a background.
6. In the **Page Background Color** field, enter a color number. For example, for yellow enter **#ff0**. You can also  click and choose a color.
7. In the **Body Background Color** field, enter a color number. For example, for yellow enter **#ff0**. You can also click  and choose a color.
8. Click **Apply** to apply your custom background.

You can select menu bar colors for your organization's Access ACS website.


### To select menu bar colors

1. Point to **Admin**, then click **Options**.
2. Click the **Themes** tab.
3. On the Themes page, click **Customize**.
4. Click **Select Menu Bar Colors**.
5. Enter a color number for each menu bar, such as **#69c** for light blue. You can also click , and choose a color. The preview window changes to reflect your selections.
6. Click **Apply** to apply your custom menu bar colors.

You can customize the title bar's color on your Access ACS website.

### To select title bar colors


1. Point to **Admin**, then click **Options**.
2. Click the **Themes** tab.
3. On the Themes page, click **Customize**.
4. Click **Select Title Bar Colors**.

5. Enter a color number for each title bar, such as **#036** for dark blue. You can also click  and choose a color. The preview window changes to reflect your selections.
6. Click **Apply** to add your custom title bar colors.

You can select grid colors when theming Access ACS.

#### To select your grid colors



1. Point to **Admin**, then click **Options**.
2. Click the **Themes** tab.
3. On the Themes page, click **Customize**.
4. Click **Select Grid Colors**.

5. Enter a color number for each grid, such as **#69c** for light blue. You can also click  and choose a color. The preview window changes to reflect your selections.
6. Click **Apply** to add your custom grid colors.

You can select the hyperlink and button colors for your Access ACS website.


#### To select hyperlink and button colors

1. Point to **Admin**, then click **Options**.
2. Click on the **Themes** tab.
3. On the Themes page, click **Customize**.
4. Click **Select Link Colors**.

5. In the **Link Color** and **Link Hover Color** fields, enter a color number. For example, **#036** for dark blue. You can also click  and choose a color. The preview window changes to reflect your selections.
6. In the **Button Color** and **Button Text Color** fields, enter a color number. For example, **#036** for dark blue. You can also click  and choose a color. The preview window changes to reflect your selections.
7. Click **Apply** to add your custom link colors.

Using the Themes portion of Access ACS, you can customize much of your website to your particular tastes. Selecting your default font, text, and emphasis colors are just a few of the many options you can customize.

#### To set the default font and text colors

1. Point to **Admin**, then click **Options**.
2. Click the **Themes** tab.
3. On the Themes page, click **Customize**.
4. Click **Select Default Font and Text Colors**.
5. Select a font from the **Default Font** drop-down list.
6. In the **Default Text Color** and the **Emphasis Text Color** fields, enter a color number. For example, enter **#c00** for red. You can also click  and choose a color. The preview window changes to reflect your selections.
7. Click **Apply** to add your custom default font and text colors or click **Cancel** to exit.

# Set up and Work with Groups

Before you work with small groups and special groups, you must set them up correctly. We recommend you sketch out your small group and special group structures on paper before working with Access ACS.

You can also set up group naming for activities and classes.

## Small Group Setup

With Access ACS, you can build, maintain, and track small group involvement. Before you work with small groups, you must set them up correctly.

On the Small Groups Setup page, administrators and staff members with appropriate rights can set up the small groups structure. We also recommend sketching this out with a pen and paper before setting it up in Access ACS.

You can create two types of small groups — parent groups and bottom-level groups.

Positions classify individuals' role in the group. Adding positions is the next step of small group setup.

After you add positions, you can add categories. Small Group categories describe your small groups and are searchable.

You can create key phrases to associate with your groups and with multiple category items with each small group. Members and attendees can search on key phrases to find groups that are of interest to them.

You can only associate one category item with each small group, and you must set up category items before assigning them to groups.

The next step is adding master or parent groups. For example, suppose you want to set up a small group structure based on sports. First, set up a parent group called sports, then create individual groups for each sport, such as basketball, soccer, and softball.

Once you have your structure in place and set up your groups, you can assign group leaders.

You must assign parent-level group leaders a staff or administrator profile. You must assign bottom-level group leaders a lay leader, staff, or administrator profile.

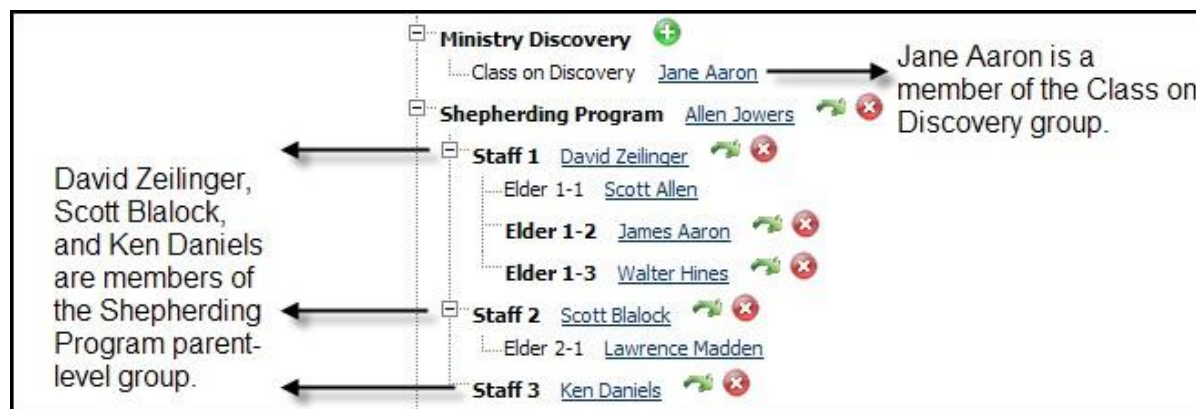
## Small Groups Overview

In Access ACS, members can:

- view small group information, including meeting dates and times, topics of discussion, and meeting locations.
- search for available small groups using categories.
- request to join small groups.

When users request to join small groups, the leaders for those groups are assigned small group connections. The leaders can follow up with the individuals and choose to add them to the small groups or reassign them to other small groups.

By default, Access ACS creates small groups that are based on your small group structure. These groups let parent-level group leaders keep track of the leaders they supervise. The following image provides an example of the default groups:



On the My Groups page, small group leaders can manage their small groups. Small group members can view the small groups to which they belong. If necessary, parent-level leaders can view and complete assigned small group connections for the leaders for whom they are responsible.

## Create the Small Group Structure

On the Small Groups Setup page, administrators and staff members with appropriate rights can set up the small groups structure.

You can create two types of small groups — parent groups and bottom-level groups.



- Member users cannot join **Parent groups**. They provide the structure for your small groups. They display as bold text on the Create Group Table page.
- Member users can join **Bottom-level groups**. These groups appear in small group searches.

You can create up to five levels in your small groups structure. You do not have to completely set up each small group. After you create the small group structure and add leaders to the group rosters, the small group leaders can enter group information and add individuals to the groups.

Before you set up your small groups, only the instructions display on the Create Group Table page. To add your first group, click **Add** on the Create Group Table heading bar.

1. Point to **Admin**, then click **Group Setup**.
2. Click **Small Groups**.
3. If you do not want to create the group on the highest level, select a parent group, then click **Add**.
4. On the **Create Small Group** page, enter the **Group Name**.
5. Click **Submit**. The **Create Group Table** page displays. The group is added to the group structure.

1. Point to **Admin**, then click **Group Setup**.
2. Click **Small Groups**.
3. In the small groups hierarchy, select the parent group and click **Add**.
4. On the **Create Small Group** page, enter the **Group Name**.
5. Select **Allow members to join this group**.
6. Click **Submit**. The **Create Group Table** page displays. The group is added to the group structure.

## Set up Small Group Positions

With the Small Groups feature, you can set up the positions that you want to use.

When you add an individual to a small group, you can select the individual's position (co-leader, participant, guest) in the group.

### To create a Small Groups position

1. Point to **Admin**, then click **Group Setup**.
2. Select **Small Groups**.
3. Click the **Positions** tab.
4. At the top of the page, click **Add**.
5. In the **Position** field, enter the position name.
6. In the **Description** text box, enter a description of the position.
7. Under **Show position with**, select **Small Groups**. This allows small group leaders to take attendance.
8. On the available tabs, select the attributes and qualifications that you want to assign to the position, then click **Save**.

## Set up Small Group Categories

Small group categories describe your small groups and are used in small group searches.

For each category group, you can add category items that describe your small groups. In the Key Phrases category group, you can add items that do not belong in the other category groups. If necessary, you can rename the category groups.

Except for the Key Phrases group, you can only associate one category item from a category group with each small group. With the Key Phrases group, you can associate multiple category items with each small group. You cannot rename the Key Phrases category group.

You must set up the category items before they can be assigned to groups. For more information on assigning category items to groups, see Entering Small Group Details.

1. Point to **Admin**, then click **Group Setup**.
2. Click **Small Groups**.
3. Click the **Categories** tab.
4. On the **Categories** tab, click the category group tab to which you want to add the category item.
5. In the **Add New Item** field, enter the category item, then click **Save**.

## Set up Master Groups

After you sketch out your small group structure, add positions, and add categories, you can add parent or master groups.

For example, suppose you want to set up a small group structure based on sports. You'd set up a parent group called sports. Later, you can create individual groups for each sport, such as basketball, soccer, and softball.

### To add a master group

1. Point to **Admin**, and click **Group Setup**.
2. Click **Small Groups**.
3. Select the coach, ministry area, or ministry division that the new group is under. For a new division, don't select anything.
4. Click **Add**.
5. Enter the **Group Name**.
6. If you are creating a small group roster, select **Allow member to be added to this group**. Do not select this if you are creating at the area leader or area coach level.
7. Click **Submit**.

## Set up Small Group Leaders

After adding your groups to the small groups structure, you must designate leaders for each group. When a member requests to join a small group, the small group leader is assigned that connection. Members cannot request to join small groups that do not have leaders.

You must assign parent-level group leaders a staff or administrator profile. You must assign bottom-level group leaders a lay leader, staff, or administrator profile.

1. Point to **Admin**, then click **Group Setup**.
  2. Click **Small Groups**.
  3. Beside the group name, click **Add Leader**.
  4. On the **Locate Individual** page, enter search criteria in the **Last Name** and **First Name/Goes-By Name** fields.
  5. Click **Run Search**.
  6. In the list of members, locate and click the individual name.
1. Point to **Admin**, then click **Group Setup**.
  2. Click **Small Groups**.
  3. Beside the bottom-level group name, click **Add Leader**.
  4. On the **Add Member** page, enter search criteria in the **Last Name** and **First Name** fields.
  5. Click **Run Search**.
  6. Select the member you want to add as the leader.

## Dropping or Deleting Group Leaders

At some point, you may have to drop or delete a group leader, so it's important to understand the difference between dropping and deleting.

- Drop a leader if you want to retain the history of the individual once they begin to serve as leader of the group. Drop them if they served any time as small group leader.
- Delete a leader if you want to remove the record from the Small Group roster. Only delete leaders if you have incorrectly added them to the group roster.

To drop or delete a group leader, in the Small Groups structure tree, click **Drop** or **Delete Leader**.

## Enter Small Group Details

After you create your small groups structure, add the small group leaders, and create small group categories, you can enter detailed profile information for your small groups.

The small group details act as search criteria when members search for available small groups. Make sure information is entered for the **Meeting Day**, **Topic/Curriculum**, **Categories**, and **ZIP/Postal Code** fields. Users search for this information when viewing available small groups. You must set up small group categories before they can be assigned to groups.

## Useful Information

You do not have to enter detailed profile information for each small group. After you set up the small group structure, add leaders, and create categories, your small group leaders can enter the detailed profile information.

### To enter small group details

1. Point to **Admin**, then click **Group Setup**.
2. Click **Small Groups**.
3. Select the group that you want to edit.
4. On the **Create Group Structure** heading bar, click **Edit**.
5. Enter the small group details and select category items that describe the group, then click **Save**.

## Copy an Existing Small Group

You may need to create a small group that is very similar to an existing one. Instead of creating the small group from scratch, you can copy the existing event and edit to match what you need.

When you copy a small group, all of the group information is copied, but the members are not. Individuals must sign up for the small group if they want to participate.

### To copy a small group

1. Point to **Groups**, then click **Small Groups**.
2. Expand the small group's parent-level group and locate the small group to copy.
3. In the right corner of the **View Details** page, click **Copy Group**.


After you click **Copy Group**, the Copying Small Group page displays. The Group Name displays as **Copy of <smallgroupname>**. You can edit the group name or keep the default name. You can edit the copied small group information as you would a normal small group.

## View a Small Group Roster

The Group Roster page displays information about the small group and a roster of participants and leaders. On this page, small group leaders can edit or delete their groups, and add or delete group participants.

The roster displays phone numbers for the small group participants. If a phone number is marked as unlisted, **Unl** will display beside the number in the roster.

### To view a small group roster

1. Point to **Groups**, then click **Small Groups**.
2. Select the Master level group, then locate the specific small group.
3. Click the name of the group you want.
  - The small group summary displays underneath the small group name.
    - If the small group has a photo uploaded, it displays on the right side of the page.
    - The total number of participants for small group displays beside the word **Roster** on the page. If the small group has a limit on the number of members who can join, the wording displays as **<num> of <num> max participants**.
  - To custom sort the names in the list, click . Select to sort and display by **First Name** or **# Last Name**. Click **OK**.
  - To sort the roster, click a column heading.
  - To print the group information and roster, in the uppermost drop-down list, click **I want to**, click **Copy Group**, then click **Go**.

Users with a **D** beside their name are inactive.

## View a Small Groups URL for your Website

Once you set up your small groups structure, you can place your Small Groups URL on your website to give your website visitors easy access to your available small groups.

With this link, members and attendees can search for available small groups and request to join groups from your website.

### To view your Small Groups URL

1. Point to **Admin**, then click **Options**.
2. Click **Web Links**. The URL displays under **Small Groups Link**.

# Special Group Setup

Special Groups are made up of individuals that are the result of an advanced search in Access ACS. For example, you can create a custom group that consists of all individuals who have birthdays during July. Members cannot join special groups online.

On the Special Groups page, you can search based on activities, classes, small groups, birthdays, address fields, member status, user-defined fields, and common fields.

To create special groups, you must have appropriate rights.

1. Point to **Admin**, then click **Group Setup**.
2. Click **Special Groups**.

When you create special groups, you must name and describe the group, search for individuals to add to the group, select the group display options, review the group roster, and save the group.

## To add a special group

1. Point to **Admin**, then click **Group Setup >Special Groups**.
2. On the **Special Groups** heading bar, click **Add**.
3. On the **Create Special Groups** page, enter the group name.
4. If necessary, enter a description in the **Description** text box, then click **Next**.
5. On the **Create Special Groups** page, select the search criteria to determine the individuals to add to your group, then click **Next**.
6. In the list of available options, select up to three fields to display in the group roster. By default, **Address Line 1**, **Phone**, and **E-mail Address** are selected.
7. In the list of security levels, select the group roster's security level. By default, **All Users** is selected. **All** - Select to let all users view the group roster.
  - **Do Not Display** - Select to let only the user who created the group view the roster.
  - **Staff Only** - Select to let only staff users view the group roster.
8. If the special group is temporary, select **Set Expiration Date** to set an expiration date for the special group. In the **Expiration Date** field, enter the date. After that date, the roster for the group is no longer available.
9. Click **Next**.
10. The group roster displays. Before saving the special group, review the roster, then click **Submit**.


With appropriate administrative rights, you can edit existing special groups. You can change the group's name, search criteria, display options, and settings.

## To edit a special group

1. Point to **Admin**, then click **Group Setup**.
2. Click **Special Groups**.
3. Click a group name.
4. Make the appropriate changes and click **Next**.

You can delete a special group if you create it in error or no longer need the group's record.

## To delete a special group

1. Point to **Admin**, then click **Group Setup**.
2. Click **Special Groups**.
3. Beside the group you want to remove, click **Delete** .
4. When the confirmation message displays, click **OK**.

You can view a special group roster.

## To view a special group roster

1. Point to **Admin**, then click **Group Setup**.
2. Select **Special Groups** and click **Next**.
3. Click **View** beside the group roster you want to view.

# Group Naming for Activities and Classes

In Access ACS, you can assign group names to your classes and activities to help members and attendees identify them.

As an administrator, the class and activity names that you use in your ACS People records are often unfamiliar to church members. If you display these group names in Access ACS, they often cannot distinguish between the groups.

Group names display when someone views available classes and activities. You must upload your organization's activity and class information before the Group Naming link displays.

1. Point to **Admin**, then click **Group Setup**.
2. Click **Group Naming for Activities**.
3. On the Activity Group Name page, click **Add**.

4. In the **Category** drop-down list, select an item.
5. In the **Element 1** drop-down list, select an item. If necessary, select other elements.
6. In the **Display Name** field, enter the activity display name.
7. If necessary, in the **Description** text box, enter a group description.
8. If necessary, enter the contact person's information in the **Contact Name** and **Contact E-mail** fields.
9. If necessary, select from the following options:
  - To prevent the activity from displaying, select **Do Not Display**.
  - To set an expiration date for the group, select **Set Expiration Date**. In the **Expiration Date** field, enter the date. After that date, the group is removed from Access ACS.
10. Click **Save**.

1. Point to **Admin**, then click **Group Setup**.
2. Click **Group Naming for Classes**.
3. On the **Classes Group Name** page, click **Add**.
4. In the **Group**, **Division**, **Department**, and **Class** drop-down lists, select the items for the class.
5. In the **Display Name** field, enter the class display name.
6. In the **Description** text box, enter a group description, if necessary.
7. If necessary, enter the contact person's information in the **Contact Name** and **Contact E-mail** fields.
8. If necessary, select from the following options:
  - To prevent the activity from displaying, select **Do Not Display**.
  - To set an expiration date for the group, select **Set Expiration Date**. In the **Expiration Date** field, enter the date. After that date, the group is removed from Access ACS.
9. Click **Save**.

## Delete Activities and Classes

If you need to delete activity or class groups in Access ACS, you can do that here.

### To delete a class or activity group

1. Point to **Admin**, then click **Group Setup**.
2. To delete a class, click **Group Naming for Classes**. To delete an activity, click **Group Naming for Activities**.
3. Click **Delete** beside the group you want to delete.

## Work with Activities, Classes, and Groups

The Groups area displays the classes, activities, and small groups for your church or organization.

From here, you can work with class, activity, and group rosters. You can add, delete, or drop individuals from rosters, and you can also view and mark attendance. In the Small Groups area, you can create a small group.

### To access groups

1. In Access ACS, place your cursor over **Groups**.
2. Click on the area you want to view (**Activities**, **Classes**, or **Small Groups**).

# Activities

Activities is a flexible and powerful tool to track active groups in your organization.

Activities may include committees, people with similar skills and talents, and volunteer opportunities such as child care workers, tutors, or transportation specialists.

Depending on your rights, you can:

- View an activity rosterExport the activity roster grid
- Add individuals to a rosterSend a Message
- Drop individuals from a rosterSend a Text
- Delete individuals from a rosterPrint mailing labels
- Join an activityPrint a directory
- Mark activity attendanceView activity attendance
- Add commentsCopy an activity roster to a small group roster
- Export information to Microsoft Excel

## Master Groups and Categories

Each activity is associated with a master group and a category. Administrators can create up to four elements for each activity. Master groups, categories, and elements are defined in ACS.

When an administrator uploads records, they become available in Access ACS. The category and elements you select for an activity display beneath the Activity Member heading. For example **Athletics > Baseball > Mens Team 1 > Active**.

## View an Activity Roster

With appropriate rights, you can view a roster of individuals enrolled in an activity. To sort the roster, click a column heading.

### To view an activity roster

1. Point to **Groups**, then click **Activities**.
2. Select the activity's **Master Group**, **Category**, and **Elements** in the available drop-down lists.

## Add an Individual to an Activity Roster

Sometimes you need to add someone to an activity because they signed up late. Other times you need to add a lot of individuals because you have just started the group or you have a surge in interest.


With the appropriate rights, you can add an individual or individuals to an activity roster.

Adding an individual to a roster creates a change request. Before the individual displays on the roster, an administrator must approve the request inside ACS People Suite and upload the changes to Access ACS.

### To add individuals to an activity roster

1. Point to **Groups**, then click **Activities**.
2. Select the activity's **Master Group**, **Category**, and **Elements** from the available drop-down lists.
3. Click **Add to Roster**.
4. On the Add Member page, enter the individual's search criteria in the **Last Name** and **First Name** fields.
5. Click **Find**.
6. Click the check box beside name of the individual you want to add.
7. To add the individuals and return to the Activity Search page, click **Add**. To add additional individuals, click **Add Another**.

## Delete Individuals from an Activity Roster

Sometimes individuals are no longer a part of an activity because they have left your church or organization. You can delete these individuals from an activity roster. The  icon displays beside the individual or individuals you delete.

Deleting individuals sends a change request to the administrator, who must approve the change in ACS People Suite and upload records to Access ACS before the deleted individual(s) are removed from the roster.


### To delete an individual from an activity roster

1. Point to **Groups**, then click **Activities**.
2. Select the activity's **Master Group**, **Category**, and **Elements** from the available drop-down lists.

3. Select the individual or individuals you want to delete from the activity roster.
4. Click **Delete from Roster**.
5. When the confirmation dialog box displays, click **Yes** to delete the individual.

## Drop Individuals from an Activity Roster

Sometimes individuals may temporarily leave an activity or just need some time off.

Use the **Drop from Roster** feature to remove these individuals from your activity roster, but keep a record of them. The  icon displays beside the name of the individuals you dropped.

Dropping an individual creates a change request. An administrator must approve the change request in ACS People Suite and upload the records to Access ACS to remove the dropped individual(s) from the activity roster.

### To drop an individual from an activity roster

1. Point to **Groups**, then click **Activities**.
2. Select the activity's **Master Group**, **Category**, and **Elements** from the available drop-down lists.
3. Select the individual or individuals you want to drop from the activity roster.
4. Click **Drop from Roster**.
5. When the confirmation dialog box displays, click **Yes**.

## Mark Activity Attendance

With the appropriate rights, you can mark attendance for activities. You can mark attendance for activities at the category, element 1, and element 2 levels.

In addition to taking attendance for activity members, you can enter the total number of visitors and their names to track attendance for visitors.

When you enter attendance markings for classes, Access ACS creates a change request. Before the attendance markings display, an administrator must approve the change request inside ACS People Suite and upload the records to Access ACS.

### Note

The total number of visitors and their names do not display in the change request. The total and names are e-mailed to the administrator separately for manual entry.

### To mark activity attendance

1. Point to **Groups**, then click **Activities**.
2. Select a master group from the **Master Group** drop-down list, and a category from **Category** drop-down list.
3. If necessary, from the **Element 1**, **2**, **3**, and **4** drop-down lists, select the activity elements.
4. In the Activity Members list, select the individuals you want to mark attendance for. To mark attendance for all individuals, select the option beside the **Name** column heading.
5. In the **I want to** drop-down list, select **Mark Attendance** and click **Go**. The activity name, date, and event display on the Marking Attendance page.
6. If necessary, change the **Marking Date**. To select the date from a calendar, click .
7. If necessary, in the **Event** drop-down list, select the event you want to enter attendance for.
8. Click **Go**.
9. To mark the selected individuals present, in the **Mark Selected List** drop-down list, select **Present**. To mark the selected individuals absent, select **Absent**.
10. In the **Additional** field, enter any guests not on the roster. The total number of attendees updates.
11. Under **Comments**, enter any comments for other group leaders or staff. You can also enter guests' names.
12. Click **Submit**.

## View Activity Attendance for Members

With the appropriate rights, you can view attendance for activity members.

When you view attendance, the day's activity attendance is recorded and uploaded display in the grid. One of three possible symbols displays beneath the dates:

Symbol	What it means
P	Indicates the individual was present at the activity.
A	Indicates the individual was absent from the activity.
–	Indicates the individual was not entered in the activity during the attendance period yet.

#### To view activity attendance

1. Point to **Groups**, then click **Activities**.
2. Select the activity's **Master Group**, **Category**, and **Element 1**. If necessary, select additional elements.
3. In the **Action** drop-down list, select **View Attendance** and click **Go**.
4. On the View Attendance page, select a **Month**, **Year**, and **Event**.
5. Click **Go**. The Activity Members grid displays beneath the **View Attendance** area. The grid lists the name of the activity members, the weeks the member attended, whether they were present or absent, and the total number of members present.

## Export the Activity Roster Grid

You can export an activity 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 the activity roster

1. Point to **Groups**, then click **Activities**.
2. Select a **Master Group**. If necessary, select a **Category**.
3. Click **Export Grid**.
4. Select to open the file or save the file to your computer.

## Print an Activity Roster

With the appropriate rights, you can print the roster for an activity.

#### To print an activity roster

1. Point to **Groups**, then click **Activities**.
2. Select the activity's **Master Group**, **Category**, and **Elements**.
3. Click **Print**. The Print Preview page displays.
4. To print the roster, click **Print**

## Copy an Activity Roster to Small Group Roster

With the appropriate rights, you can copy an activity roster and attendance records to a small group or multiple small groups.

After you copy the roster, Access ACS adds both activity members and leaders to the small group rosters as members. To make an individual a leader, you must change the individual's position in the small group roster.

If you copy individuals to a small group of which they are already members, Access ACS does not overwrite the existing records or create duplicate records.

#### To copy an activity roster to a small group roster

1. Point to **Groups**, then click **Activities**.
2. Select the activity master group from the **Select a Master Group** drop-down list.
3. In the **Category** and **Element** drop-down lists, select the category and elements the activity belongs. You must select the **Category** and **Element 1**.
4. Under **Activity Members**, select the individuals you want to copy to the small groups roster. To select the entire list, select the option beside the **Name** column heading.
5. Click **I want to**, select **Copy to Small Group**, then click **Go**.
6. In the list of small groups, select the groups you want to copy to the activity roster.
7. If necessary, you can copy the activity attendance record to the small group roster:
  - Select **Include Attendance Records**.  
Click **Select an Event**, select the event with the attendance markings you want to copy. You can select one event.
8. Click **Submit**.

Note: If organizations are included in the activity roster, you cannot copy them to the small group roster.



# Classes

On the Classes page, you can view classes, leaders, and members.

First, you are required to select a **Master Group**. Depending on the class you are searching for, you can then select the **Class Code** or **Structure** to find your class.

From here, you can add a new family, add individuals to the roster, drop or delete individuals from the roster, show the roster history, and print or export the class grid.

## Mark Class Attendance

You can mark attendance for classes at the division, department, and class levels. You can also enter the total number of visitors and their name to track attendance for visitors.

When you enter attendance markings for classes, Access ACS creates a change request. To display the markings, an administrator must approve the change request in ACS People Suite and upload the changes to Access ACS.

Note: The total number of visitors and their names do not display in the change request. The total and names are e-mailed to the administrator separately for manual entry.

### To mark class attendance

1. Point to **Groups**, then click **Classes**.
2. On the Find a Class page, select a **Master Group**, then select a **Class Code**, or select a **Division**, **Department**, and **Class**. If a Master Group contains many tiers, **Division** and **Department** may not be available.
3. In the Class Roster section, select the individuals you want to mark attendance for. To mark attendance for all individuals, select the option beside the **Name** column heading.
4. In the **I want to drop-down** list, select **Mark Attendance** and click **Go**. The class marked, date, and event display on the Marking Attendance page. A list of the selected individuals display.
5. If necessary, change the date in the **Marking Date** field. To select the date from a calendar, click .
6. If necessary, in the **Event** drop-down list, select the event you want to enter attendance for. Click **Go**.
7. To mark the selected individuals present, in the **Mark Selected List** drop-down list, select **Present**. To mark the selected individuals absent, select **Absent**.
8. Under **Confirm Your Selections**, select the individuals to mark present or absent. As you select individuals, the number marked updates.
9. To add a number of class visitors, enter it beside **Additional**. The updates the total.
10. Under **Comments**, enter any comments for other group leaders or staff. You can also enter guests' names.
11. Click **Submit**.

## View Class Attendance

You can view attendance for all individuals enrolled in a class.

### To view class attendance

1. Point to **Groups**, then click **Classes**.
2. On the Find a Class page, select a **Master Group**.
3. Select a **Class Code**, or select a **Division**, **Department**, and **Class**. If a **Master Group** contains many tiers, **Division** and **Department** may not be available.
4. In the **I want to** drop-down list, select **View Attendance** and click **Go**.
5. On the View Attendance page, select a **Month**, **Year**, and **Event**, then click **Go**.

The Class Members grid displays beneath the View Attendance area. The grid lists the name of the class members, the weeks of the selected month the member attended, whether they were present or absent, and the total number of members present.

To sort the list by name, click the **Names** column. To sort the list by date, click the date you want to sort by.

The days the class meets displays in the first row of the grid. The days class attendance is recorded and uploaded display in the grid. One of three possible symbols displays beneath the dates:

Symbol	What it means
<b>P</b>	Indicates the individual was present at the class.
<b>A</b>	Indicates the individual was absent from the class.
-	Indicates the individual was not yet entered in the class during the attendance period.

# View a Class Roster

You can view a roster of individuals enrolled in a particular class. To sort the roster, click a column heading.

## To view a roster

1. Point to **Groups**, then click **Classes**.
2. Select a **Master Group** from the drop-down list.
3. Select a **Class Code**, or select a **Division**, **Department**, and **Class**. If a Master Group contains many tiers, **Division** and **Department** may not be available.

# Add an Individual to a Class Roster

With appropriate rights, you can add individuals to class rosters.

Adding an individual creates a change request. To display the individual in the class roster, an administrator must approve the change request inside ACS People Suite and upload the changes to Access ACS.

To indicate that the class is the individual's main class, select **Primary Class for the selected individual(s)**.

## To add an individual to a class roster

1. View the class roster.
2. Click **Add to Roster**.
3. On the **Lookup Individual** page, enter a **Last Name** and **First Name**.
4. Click **Find**.
5. In the **Search Results** list, select the individual or individuals you want to add.
6. In the **Effective Date** field, enter the date that the individual becomes a class member, if applicable.
7. If the class selected will be the primary class, select the **Primary Class for the selected individual(s)** option.
8. To add the individuals and return to the **Class Search** page, click **Add**. To add the selected individuals and add additional individuals, click **Add Another**.

# Delete an Individual from a Class Roster

Sometimes individuals may leave your organization and are no longer part of a class.

You can delete these individuals from a class roster. The  icon displays beside the individual or individuals you deleted.


Deleting an individual from a roster creates a change request. To delete the individual from the roster, an administrator must approve the request inside ACS People Suite and upload the changes to Access ACS.

## To delete an individual from a class roster

1. Point to **Groups**, then click **Classes**.
2. Select a **Master Group** from the drop-down list, then select a **Class Code**, **Division**, **Department**, and **Class**.
3. Select the individual or individuals you want to delete from the class roster, then click **Delete from Roster**.
4. When the confirmation message displays, click **Yes** to complete the delete; click **No** to cancel the delete.

# Drop an Individual from a Class Roster

Sometimes individuals are no longer a part of a class because they needed some time off or left for a short period.

A dropped individual's record still exists. The  icon displays beside the name of the individuals you dropped.

Dropping an individual from a roster creates a change request. To drop the individual from the roster, an administrator must approve the request inside ACS People Suite and upload the changes to Access ACS.

## To drop an individual from a class roster

1. Point to **Groups**, then click **Classes**.
2. Select a **Master Group** from the drop-down list, then select a **Class Code**, **Division**, **Department**, and **Class**.
3. Select the individual or individuals you want to drop from the class roster, then click **Drop from Roster**.
4. When the confirmation message displays, click **Yes**.

# Print a Class Roster

You can print a class roster.

## To print a class roster

1. Point to **Groups**, then click **Classes**.
2. Select the **Master Group**.
3. Select an item from the **Class Code** list or select items from the **Division**, **Department**, and **Class** drop-down lists. If a Master Group contains many tiers some of these choices may not be available.
4. Click **Print**.

# Copy a Class Roster to a Small Group

With the appropriate rights, you can copy members from a class roster to a small group or multiple small groups.

After you copy the roster, the individuals retain their previous group position status. Individuals on the class roster who are already enrolled in the small group are not overwritten.

## To copy a class roster to a small group

1. Point to **Groups**, then click **Classes**.
2. On the **Find a Class** page, select a **Master Group**.
3. Select a **Class Code**, or select a **Division**, **Department**, and **Class**.
4. Select the individuals you want to copy. To copy the entire class roster, select the check box beside **Name**.
5. In the **I want to** drop-down list, select **Copy to Small Group**, then click **Go**.
6. Select the small group roster or rosters to copy to, then click **Submit**.

# Small Groups

Using small groups lets your organization set up and manage small groups of participants. You can create two types of small groups, **parent-level groups** and **bottom-level groups**.

Parent-level groups are those groups participants cannot join. They provide the structure for your small groups. Parent-level groups display as bold text on the Create Group Table page.

Participants can join bottom-level groups and

- View small group information, including meeting dates and times, topics of discussion, and meeting locations. Search for available small groups using categories. Request to join small groups.

When a participant requests to join small groups, the leaders for those groups are assigned a small group connection. Leaders can follow up with the individuals and choose to add them to the small groups or reassign them to other small group leaders.

By default, Access ACS creates small groups based on your small group structure. These groups let parent-level group leaders keep track of the leaders they supervise. The following image provides an example of the default groups:




On the My Groups page, small group leaders can manage their small groups, and small group participants can view their small groups. If necessary, parent-level leaders can view and complete assigned small group connections for the leaders they are responsible for.

## Create a Small Group

Members with appropriate rights can create or edit small groups. Small group leaders can edit the information for the small groups they lead.

When you create a new small group, it is automatically added to the database.

1. Point to **Groups**, then click **Small Groups**.
2. Click **Create a Group**.
3. Enter the **What** and **Where** information for the small group. Fields marked with a red asterisk indicate required fields.
4. Click **Continue**.
5. Select one of the three available options for what time the small group meets. If you select **Yes, I know what times we are meeting**, enter a start and end time.
6. Select one of the three available options for what days the small group meets. If you select **Yes, I know what dates we are meeting**, select your scheduling preference from the available options.
7. To add another meeting time after establishing the initial meeting time, click **Add Another** at the bottom of the page. To delete a meeting time, locate the meeting time you want to delete and click .
8. Click **Save and Continue**.
9. On the Group Details page, select or enter the applicable options for your group.
10. To schedule reminders, select **Send e-mail to group members**, then select when to send the e-mail. You can enter the e-mail's text.
11. When finished, click **Done**.

## Additional Field Information

**Website/Facebook** – Enter the Web address or Facebook page address associated with the small group. The entire URL must be entered.

**Copy the leader of the parent group on all e-mails** – Copies the leader of the parent group on all e-mail correspondence for the small group.

**Receive e-mail notifications for marking attendance** – Notifies the small group leader to mark small group attendance.

**Allow everyone to view this group** – Lets everyone view the small group information. If you do not select this option, the small group information does not display.

**Allow members to automatically join this group** – Lets members immediately join the group from the group search page instead of waiting for the small group leader's approval.

**Send e-mail to group members <num day> before meeting** – Sends a pre-meeting e-mail reminder about the small group meeting. To enter the number of days for the reminder, click the drop-down list and select **1 day**, **3 days**, or **1 week**.

For example, you set up a meeting every Monday and Wednesday beginning in May and ending in September with a weekly reminder. The reminder begins the week before the meeting begins and is sent out every Sunday and Wednesday until the end.

**Meeting Reminder Message** – Enter the text you want sent to the participants about the meeting in this text box. Click **Check Spelling**, if necessary.

## Edit a Small Group


You can edit a small group.

1. Point to **Groups**, then click **Small Groups**.
2. Select the **Master level** group, then locate the group you want to edit.
3. Click the name of the small group you want to edit.
4. In the uppermost drop-down list, click **I want to. . .**, then click **Edit Group**.
5. Click **Go**.
6. Edit the small group profile information. Fields marked with a red asterisk are required.
7. To edit **Meeting Times** or **Group Details**, click the corresponding numbered step at the top of the page.
8. Click **Done**.

## Copy a Small Group

You may want to copy small group settings. You could do this when you want to offer a small group similar to one already created but don't want to create the small group again.

You can copy any small group - past, present, future, and canceled. When you copy a small group, all of the group information is copied.

1. Point to **Groups**, then click **Small Groups**.
2. Select the small group's master level group. Select **Include Inactive Groups** in the right corner, if needed.
3. Click **View Details**  beside the small group you want to copy.
4. In the uppermost drop-down list, click **I want to. . .**, then click **Copy Group**.
5. Click **Go**.

The Copying Small Group page displays. The Group Name displays as **Copy of <smallgroupname>**. You can edit the group name or keep the default name. You can also edit the copied small group information as you would a normal small group.

## Delete a Small Group

Small group leaders with the appropriate rights can delete small groups.

Deleting a small group removes all group information and bottom-level groups. It is permanent and cannot be undone.

1. Point to **Groups**, then click **Small Groups**.
2. Select the Master level group, then locate the specific small group.
3. Click the name of the group you want to delete.
4. In the uppermost drop-down list, click **I want to**, then click **Delete Group**.
5. Click **Go**.
6. When the confirmation message displays, enter **DELETE** in the box, then click **OK**.

# Mark Small Group Attendance

You can mark attendance for small groups. To mark or view small group attendance, you must be the small group leader, a staff member with rights to small groups and to view and post attendance, or an administrator.

When you enter attendance markings for small groups, Access ACS does not create a change request. Once you submit the attendance markings, you can view them in Access ACS.

1. Point to **Groups**, then click **Small Groups**.
2. Select the master level Group for the small group.
3. Click the **Group Name**.
4. In the Roster section, select the individuals you want to mark attendance for. To mark attendance for all individuals, click the check box beside the **Name** column heading.
5. Click the second **I want to** drop-down list, select **Mark Attendance**, then click **Go**. A list of the individuals display.
6. If necessary, change the date in the **Marking Date** field. To select the date from a calendar, click . The **Marking Date** defaults to the last scheduled meeting date.
7. To mark the selected individuals present, in the **Mark Selected List** drop-down list, select **Present**. To mark the selected individuals absent, select **Absent**.
8. In the **Additional** field, enter any guests not on the roster. The total number of attendees updates.
9. Under **Small Group Markings for**, select any individuals to mark.
10. If necessary, add guests, comments, prayers, or prayer requests. Click the beside **Add guests, comments, prayers, or prayer requests**.
  - Enter the names of all of the guests who attended the small group and for whom you want to count towards the total attendance. These names are e-mailed to the default contact person for the small group, and other individuals you can select or enter.
  - Enter any comments or notes about the meeting, along with any praise or prayer requests you may have received.
  - To send the e-mails to group members or the master level leader and group, make a selection from the **Send e-mail to** drop-down list.
  - To send the e-mail to individuals who are not currently affiliated with the group, enter the e-mail addresses in the **also send e-mail to** field. Separate each e-mail address with a semi-colon. For example, *jon.doe@home.com;mary.white@work.com*.

## Useful Information



The e-mail sent out only displays the information selected for the individual it is sent to.

For example, Mark is entered to receive information about Guests and Comments while Judy is entered to receive just Comments. When the e-mail is sent, Mark will see the Guests and Comments information, not the Praise and Prayer Requests; Judy will see the Comments information and not the Guests or Praise and Prayer Request information.

11. Click **Submit**.

# View Small Group Attendance

To view small group attendance markings, you must be the group leader, a staff user with rights to view and post attendance, or an administrator.

1. Point to **Groups**, then click **Small Groups**.
2. Select the master level Group for the small group.
3. Click the **Group Name** of the small group you want to view.
4. In the second **I want to** drop-down list, select **View Attendance**, then click **Go**.
5. Select a **Month** and **Year**, then click **Go**.
6. The Small Group Members grid displays the name of the small group members, the week's of the selected month the member attended, whether they were present or absent, and the total number of members present. To sort the list by name, click the **Names** column. To sort the list by date, click the **Dates** column.
7. The days the small group meet displays in the first row of the grid. The days small group attendance is recorded and uploaded display in the grid. One of three possible symbols displays beneath the dates:

Symbol	What it means
<b>P</b>	Indicates the individual was present at the small group meeting.
<b>A</b>	Indicates the individual was absent from the small group meeting.
-	Indicates the individual was not yet entered in the small group during the attendance period.


The totals of all the present small group participants displays at the bottom of the grid in the **Total Present** row.

# View Small Group Rosters

The Group Roster page displays information about the small group and a roster of participants and leaders. Small group leaders can edit or delete their groups, and add or delete group participants.

The roster displays phone numbers for the small group participants. If a phone number is marked as unlisted, **Unl** will display beside the number in the roster.

Users with a **D** beside their name are inactive.

1. Point to **Groups**, then click **Small Groups**.
2. Select the Master level group, then locate the specific small group.
3. Click the name of the group you want.
  - The small group summary displays underneath the small group name.
  - If the small group has a photo uploaded, it displays on the right side of the page.
  - The total number of participants for small group displays beside the word **Roster** on the page. If the small group has a limit on the number of members who can join, the wording displays as **<num> of <num> max participants**.
  - To custom sort the names in the list, click . Select to sort and display by **First Name** or **# Last Name**. Click **OK**.
  - To sort the roster, click a column heading.
  - To print the group information and roster, in the uppermost drop-down list, click **I want to**, click **Copy Group**, then click **Go**.

# Copy a Small Group Roster

At some point, you may want to copy an entire small group roster. This could occur if your organization has a promotion program. For example, all Youth small group participants need to be promoted to the Young Adult small group.

1. Point to **Groups**, then click **Small Groups**.
2. Select the Master level group, then locate the specific small group.
3. Click the name of the group.
4. Select the participant or participants you want to copy to the small group roster. To copy all of the participants, select the check box beside **Name** at the top of the grid.
5. In the second **I want to** drop-down list, select **Copy to Small Group**, then click **Go**.
6. Select the small group you want to copy the participant or participants to. If necessary, you can select more than one small group.
7. To include the participants attendance records from the previous small group in the copy, select **Include Attendance Records** at the top of the grid.
8. Click **Submit**.

# Work with Small Group Participants

You can add, drop, or delete small group members. You can also change a member's position in the small group.

## Add Small Group Participants

You can add participants to small groups you lead.

When you add individuals in Access ACS, you first select the position you want, then search for the individuals you want to add. You can add as many individuals as you need without having to repeatedly select the position from a drop-down field.

To add an individual or individuals who are not currently in the database, click the **Add them to the database** hyperlink above the grid on the Adding to page. If you click the hyperlink, the Add New Family page displays. You can then add one or multiple individuals to the database.

1. Point to **Groups**, then click **Small Groups**.
2. Select the Master level group, then locate the specific small group.
3. Click **Add to Roster**.
4. Select a position from the drop-down list.
5. In the **Last Name** and **First Name** fields, enter your search criteria.
6. Click **Run Search**.
7. Click **Select** beside the name of the individual you want to add to the group. The individual's name is automatically displayed in the **The following Individual(s) will be added to the roster** grid.
8. Continue entering, searching, and selecting individuals until you have everyone you need for the roster.
9. Click **Add to Roster**.

If some of the individuals you select to add to the roster do not have an e-mail address, you can add one before adding those individuals to your roster.


1. Locate the individual you want to add an e-mail for within **The following individual(s) will be added to the roster** grid.
2. In the **E-mail** column, click **Add e-mail address here**.
3. Select the **E-mail Type** from the drop-down list.
4. Enter the e-mail address in the **E-mail** field.
5. If the e-mail address entered can be displayed in searches and directories, select **I want this e-mail listed**.
6. If the e-mail address entered is the individual's primary e-mail address, select **This is my preferred e-mail address**.
7. Click **Submit**. Repeat this process until you have entered e-mail addresses for all of the necessary individuals.

## Drop Small Group Participants

You can drop participants from small groups you lead.

Dropping participants is a good option if they are temporarily leaving the group. Individuals are removed from the current roster but group history and attendance markings are kept for record purposes.

### To drop a participant

1. Point to **Groups**, then click **Small Groups**.
2. Select the Master level group, then locate the specific small group.
3. Select the participant(s) you want to drop, then click **Drop from Roster**.
4. A confirmation message displays. To change the drop date, enter a new date in the field or click .
5. Click **Yes**.

## Delete Small Group Participants

If an individual moves away or leaves your organization for good, you can delete them from the small group you lead.

When you delete a participant from a small group roster, his records are completely removed from the history of the small group.

### To delete a participant


1. Point to **Groups**, then click **Small Groups**.
2. Select the Master level group, then locate the specific small group.
3. Select the participant(s) you want to remove, then click **Delete from Roster**.
4. When the confirmation message displays, click **Yes**.



# Change a Participant's Small Group Position

Once you add individuals to a small group, you can change their position in the small group.

## To change an individual's position

1. Point to **Groups**, then click **Small Groups**.
2. Click the **Master Group**.
3. Click the **Group Name**.
4. In the **Roster** section, location the individual you want to change positions for.
5. Under **Edit Position**, click .
6. Select a new **Position**, then click **Update**.

# E-mail Small Group Participants

You can e-mail your small group participants from Access ACS.

## To e-mail a small group


1. Point to **Groups**, then click **Small Groups**.
2. Select the master level Group for the small group.
3. Click the **Group Name**.
4. Select the members you want to e-mail.
5. In the **I want to...** drop-down list, click **Send a Message**, then click **Go**.
6. To change the **Reply To** and **Subject** fields, click **Change**. These fields are automatically inserted.
7. Enter any additional e-mail addresses to send the message to.
8. Enter a subject for the message.
9. **Optional:** Select to **Send this message to the parents of children**. this is helpful if the participants of the small group are teens and the information in the e-mail is concerning payment for a retreat.
10. Compose your message, then click **Send Message**.

# Mark Worship Attendance

With appropriate rights, you can mark worship attendance in Access ACS.

When you mark worship attendance, Access ACS creates a change request. To display the markings, an administrator must approve the change request in ACS People Suite and upload the changes to Access ACS.

## To mark worship attendance

1. Point to **Groups**, then click **Mark Worship**.
2. Select the **Worship Group**, if applicable.
3. Select the **Marking Date** in the drop-down list or click  to select the date from a calendar.
4. Select an item from the **Event** drop-down list, then click **Go**.
5. Select the individuals for whom you want to mark attendance. Click a letter to view a list of individuals whose last names begin with that letter.
6. To mark attendance and send a change request to your administrator for approval, click **Submit**
7. To save the attendance markings without sending a change request, click **Save**. You can complete your markings and submit a change request at a later date.

# Send a Text Message

With the appropriate rights, you can send a text message from a roster page.

## To send a text message

1. View an activities, class, small group, or special group roster.
2. Select the individuals you want to text. To select all individuals, select the check box beside **Name**.
3. In the second **I want to** drop-down list, click **Send a text** and click **Go**.
4. Enter your text message in the text box. You are limited to 140 total characters for your message.
5. Click **Text Now**.

# Set up and Work with Serving Opportunities

With the Serving feature, you can manage your organization's online volunteer opportunities and allow individuals at your organization to volunteer for available volunteer opportunities.


On the Serving tab, you can view opportunities and open serving positions. You can also add opportunities, search for volunteers, and manage volunteers and opportunities.

## Add, Edit, and Copy Serving Opportunities

On the Opportunities page, you can view the available opportunities for ministry or service, and open serving positions. The **Opportunities** tab displays a list of the available opportunities. The **Open Serving Positions** tab displays a list of all of the open serving positions available for opportunities.

## Opportunities


To view a detailed list of the volunteers for an opportunity, click the name of the opportunity you want to view.


To filter the list by date, enter the appropriate dates in the **From** and **to** fields, then click **Go**. To select the date from a calendar, click , then click **Go**.

To view all future revisions, enter the current date in the **From** and **to** fields. To sort the list of opportunities, click a column heading.

With the appropriate rights, you can add, edit, and copy opportunities.

1. Point to **Serving > Manage Opportunities**.
2. Click **Add Opportunity**.
3. Enter the appropriate information in the available fields.

1. Point to **Serving > Manage Opportunities**.
2. On the **Opportunities** tab, find the opportunity you want to edit, and click .
3. Make the appropriate changes to the opportunity.
4. Click **Save**.

1. Point to **Serving > Manage Opportunities**.
2. On the **Opportunities** tab, locate the opportunity you want to copy.
3. Under **Options**, click **Copy Opportunity** .

After you click **Copy Opportunity**, the Copy Opportunity page displays. The **Opportunity Name** displays as **Copy of <opportunityname>**. You can edit it or keep the default name. Edit the copied opportunity information as you would a normal opportunity.

## Open Serving Positions

To view detailed information about a volunteering position, click the name of the position you want to view. To sort the list of positions, click a column heading.

If you click a position, the Position Details page displays important information regarding the position. From this page, you can select volunteers to participate in the opportunity.

1. Point to **Serving > Manage Opportunities**.
2. Click on the **Open Serving Positions** tab.
3. Click on the position you want to select a volunteer for.
4. On the Position Details page, click **Select Volunteer**.
5. In the appropriate fields, enter the last name and first name of the volunteer you want.
6. Click **Run Search**.
7. A list of volunteers who match the criteria for the position displays. Select the volunteer or volunteers you want. The volunteer is added to the Interested Volunteers section of the Manage Volunteers page.

## Add and Edit Serving Positions

After creating serving opportunities, select the type of position you want to fill.

For example, you create a serving opportunity for a Sunday School teacher. You can create a position named Teacher and assign that position to the serving opportunity.

Members can also associate attributes and qualifications with their profiles. When they search for available serving opportunities, they can view a list of serving opportunities that match their attributes and qualifications.

### To create a position

1. Point to **Serving**, then click **Setup**.

2. Click the **Positions** tab.
3. At the top of the page, click **Add**.
4. In the **Position** field, enter the position name.
5. In the **Description** text box, enter a description of the position.
6. Under **Show position with**, make sure that **Opportunities** is selected.
7. On the tabs, select the attributes and qualifications that you want to assign to the position, then click **Save**. This section only displays if **Opportunities** is selected under **Show position with**.

For more information about the available options, see the following table:

If...	And...	Then...
The position is associated with a small group.	An individual with this position joins the small group.	The Small Groups option cannot be selected.
If the position is associated with an opportunity.	An individual volunteers for the position in the opportunity.	The Opportunities option cannot be selected.
If the position is associated with a small group and an opportunity.	An individual with this position joins the small group, and an individual volunteers for the position in the opportunity.	Show position with does not display.

## Add and Edit Serving Positions from Small Groups

With appropriate rights, you can add and edit positions from small groups.


### To add an edit positions

1. Point to **Admin**, then click **Group Setup**.
2. Select **Small Groups**.
3. Click the **Positions** tab.
4. Click **Add**.
5. Enter information about the position. For more information, see About the Add/Edit Positions page.
6. Click **Save**.


## Delete Serving Positions

With appropriate rights, you can delete positions from small groups and opportunities.

### To delete positions using the Opportunities feature

1. Point to **Admin**, then click **Serving Setup**.
2. Click the **Positions** tab.
3. Beside the position that you want to remove, click **Delete** .

### To delete positions using the Small Groups feature

1. Point to **Admin**, then click **Group Setup**.
2. Select **Small Groups**.
3. Click the **Positions** tab.
4. Beside the position that you want to remove, click **Delete** .

If an individual within an opportunity is associated with a small group or if a position is linked to an opportunity, the **Delete** option does not display.

# Add and Edit Serving Attributes

By default, the following attribute categories display: Spiritual Gifts, Heart, Abilities, Personality Traits, and Experience.

With appropriate rights, you can add and edit your Serving attributes. You can also associate them with serving opportunities.

Your members can also select attributes that describe them. When they search for available serving opportunities, they can view a list of opportunities that match the attributes that they select.

1. Point to **Admin**, then click **Serving Setup**.
2. Click the **Attributes** tab.
3. Click the category tab to which you want to add the attribute.
4. At the top of the page, click **Add Attribute**.
5. In the **Name** column, enter the attribute name.
6. In the **Description** column, enter a description of the attribute.
7. In the **Active** column, select the check box to activate the attribute.
8. Click **Update**.


# Add and Edit Serving Qualifications


You can associate qualifications with the serving opportunities you create. Your members can also select qualifications that describe them. When they search for available serving opportunities, they can view a list of opportunities that match the qualifications they select.

For example, passing a background check or having a commercial driver's license (CDL) could be considered a qualification to serve in specific positions.

With appropriate rights, you can add and edit your Serving qualifications.

1. Point to **Admin**, then click **Serving Setup**.
2. Click the **Qualifications** tab.
3. At the top of the page, click **Add Qualification**.
4. In the **Name** column, enter the attribute name.
5. In the **Description** column, enter a description of the attribute.
6. In the **Active** column, select the check box to activate the attribute.
7. Click **Update**.

1. Point to **Admin**, then click **Serving Setup**.
2. Click the **Qualifications** tab.
3. Beside the qualification that you want to edit, click **Edit** .
4. Edit the qualification, then click **Update**.

1. Point to **Admin**, then click **Serving Setup**.
2. Click the **Qualifications** tab.
3. Beside the qualification that you want to delete, click **Delete** .

# Manage Volunteers

With the appropriate rights, you can view all of the options available on this page.

## To manage volunteers

1. In Access ACS, click on **Serving**,
2. Click on the serving opportunity you want to manage volunteers for.
3. To recruit volunteers, click **Recruit**.
4. To edit the opportunity, click **Edit Opportunity**.
5. To export the information to an Excel spreadsheet, click **Export Grid**.

A description of the opportunity displays beneath the name along with a list of the available positions, openings left, filled positions, and total positions. To view the details about a position, click the position name. The current openings and the number of people with matches of four or more stars displays in bold beneath the list. The location of the volunteer opportunity, the close date, contact, and information about childcare display to the left of the description and position information

## Volunteers

The **Volunteers** section displays members who match the criteria you set up for the volunteer opportunity. In the **I want to** drop-down list, you can add comments, export a list of volunteers to Excel, e-mail volunteers, text volunteers, print a directory of volunteers, or print volunteer mailing labels.

## Interested Volunteers

The **Interested Volunteers** section displays a list of the volunteers who are actively interested in participating in the volunteer opportunity. To accept a volunteer for the opportunity, select the check box beside the volunteer name.

You can include a custom e-mail message to the potential volunteer by entering text in the **Include a custom E-mail Message** field. You can also create a custom e-mail message for rejecting a volunteer from a volunteer opportunity. To accept the volunteers and send the custom e-mail message, click **Accept**. To decline to volunteer and send the custom rejection e-mail, click **Decline**.

## Discover Volunteers

You can use the Volunteer Discovery page to locate individuals to serve in your organization's needs. After you search for volunteers, you can send them invitations to participate or assign them a position.

1. Point to **Serving**, then click on the serving opportunity you want to manage volunteers for.
2. Click **Recruit**.
3. On the **Volunteer Discovery** tab, select the **Availability**. Select **Anytime** if you do not have a specific Availability need.
4. Select the attributes you are looking for in a volunteer, then click **Find Matches**. Individuals who match your selections display.
5. To view the availability, attributes, and commitments of a specific individual, click the percentage under **Match**. A dialog box with the individual's information displays.
6. To print the list of individuals returned from your search, click **Print**.
7. To export the list of individuals as a Microsoft Excel spreadsheet, click **Export Grid**.

## Recruit Volunteers

You can use the Volunteer Recruitment page to search for, invite, or assign volunteers to an appropriate opportunity.

1. Point to **Serving**, then click on the serving opportunity you want to manage volunteers for.
2. To recruit volunteers, click **Recruit**.
3. Select the position you want to recruit for from the **Position** drop-down list. If an alternate position name is entered for the position, then the alternate position name displays instead.
4. Click **Find Matches**. The Volunteer Recruitment page displays.
5. Select the names of the most appropriate volunteer for the position from the list. To select all of the available volunteers, select the **Match check box**.
6. To invite the selected volunteers to the opportunity, click **Send Invite**.
7. On the Send E-mail page you can select to: have Access ACS send an e-mail to the selected members for you, have Access ACS send an e-mail to the parents of any children selected.
8. To assign the selected volunteers to the opportunity, click **Assign to Position**.

## Selecting Volunteers

Two indicators display to help you select a volunteer from the Recruiting Results page, the five-star rating and the **View Matches** link.

- The five-star rating indicates how well an individual matches the criteria set for the opportunity. The number of stars displayed beside an individual's name correlates to the number of attributes matched.
- The **View Matches** link displays the attributes and qualifications of each individual. For example, you need to fill a position that requires the volunteer be people oriented. Your search for volunteers for the opportunity returns two individuals with four star matches. Now, you can click **View Matches** and know that one of the individuals works well with people while the other does not.

If you select to let ACS send an e-mail for you, a form e-mail is sent.

## Running an Advanced Search

The Volunteer Recruitment page also lets you run an advanced search for volunteers.

To run an advanced search, click **Advanced Search** in the top right corner of the **Recruit People to Serve** section. You can search using the Opportunity Name and Position as well as the Availability of the volunteers and the Attributes they selected when they created their profile.

## Accept and Reject Volunteer Requests

When individuals at your organization request to volunteer for available opportunities, you can accept or reject each request. If necessary, you can also send an e-mail message to the individual.

**To accept or reject a volunteer request**

1. Point to **Serving**, then click **Manage Opportunities**.
2. Click the name of the opportunity you want to manage volunteers for.

3. Under **Interested Volunteers**, select the individual you want to serve in the opportunity.
4. If necessary, enter an acceptance or rejection message in the **Include a custom E-mail Message** text box.
5. To accept a volunteer, click **Accept**. To reject a volunteer, click **Decline**.

# Create and View Administrative Reports

With the appropriate rights, you can create and run custom reports using your organization data. You can create both shared and private reports. Anyone with appropriate rights can view shared reports, but you can only view private reports you create.

After you select the information you want to display on a report, you can save it for future use. You can also view reports in multiple output formats.

**Events Reports** lets you view and export reports containing event related information. For more information about Event Reports, see Event Reports.

**Online Giving Reports** lets you view and export reports containing online giving related information. For more information about Online Giving Reports, see Online Giving Reports.

## Add and Edit Custom Reports

With appropriate rights, you can add, edit, and delete custom reports.

You can create both shared and private custom reports. Anyone with appropriate rights can view shared custom reports, but you can only view the private custom reports you create.

1. Click **Reports**.
2. Click either the **Shared Reports** or **Private Reports** tab.
3. At the top of the page, click **Add New Report**.
4. Follow the instructions that display on the Create Report Expert pages.
5. On the **Run/Save** tab, click **Save**.
6. In the **Report Name** field, enter a unique name for the report.
7. In the **Report Description** text box, enter a description of the report.
8. Click **Save**.

## Event Reports

Event Registration lets users with the appropriate rights view and export reports. You can create various types of reports.

### To create event reports

1. In Access ACS, click **Reports**, then **Event Reports**.
2. Select the **Report Type** you want to create.
3. Enter the report's **Start Date** and **End Date**.
4. Select the **Campus** or **Department** the report is for.
5. Select any specific events for the report.
6. To view the report by registrant, enter the registrant's **Last Name**.
7. To view a report, click **View Report**. To export it, click **Export**.

### Additional Field Information

**Event Registrations** – Displays details about individuals who have signed up for the event.

**Registrants Contact Information** – Displays contact details about the registrants for the event. All e-mail addresses associated with each registration display.

If you export this report, e-mail addresses are contained within a single column. If you want to separate them for sending e-mails, you can split the columns into different cells. To learn more, see Split text into different cells.

**Custom Questions** – Displays the questions and answers to the custom questions associated with the event. The report displays the **Question** and the full **Answer** in the report. However, in the Event Export, the custom question option displays each question represented by a column and each answer displays on a row below the corresponding question.

**Supplies Sold** – Displays a list of supplies reserved by individuals when they registered for the events. It includes the supplies, quantity sold, unit price, tax amount, and total cost.

**Event Revenue Detail** – Displays a detailed list of revenue received from event registrations. It includes the guest count, relationships between registered individuals, event, sub-event, and supplies revenue, total cost, any descriptions the registrants enter, confirmation number, and GL Code.

**Event Revenue Summary** – Displays a summary of the revenue collected from event registrations. It includes the revenue for the event and supplies, total cost, and GL Code.

**Event Detail and Sub-Event Detail** – Displays details for events or sub-events. It includes the seats sold and revenue for the event.

**Event Cancellations** – Displays the event registration cancellations. It also displays the total number of guests registered, amounts refunded, and dates refunded.


**Event Transaction** – Displays a detailed report of online payments and refunds. If a member registered multiple family members, only the member who paid for the event displays on the report. The report also displays the credit card name, ending digits, transaction ID, refund transaction ID, and GL Code (if applicable).

**Event Refunds Still to Process** – Displays the name of the individual and the event requiring a refund based on the date last modified and the refund date.

## View Event Registration Transactions

Use the Transactions tab to search for and view event registration transaction information for specific dates or events.

### To view event registration transactions

1. Point to **Reports**, then click **Event Reports**.
2. Click the **Transactions** tab.
3. Enter a **Start Date** and **End Date**. To select the dates from a calendar, click  for each field.
4. Select an **Event**.
5. If necessary, select to **Include Online Payments**.
6. Click **Go**.

## Export Event Reports

The Export tab lets you generate and export a report about a specific event to a spreadsheet, where you can view your event information in a more versatile format or sort the individuals using the questions and answers.

You can export only financial information pertaining to the event, such as event and subevent costs, and the amount that an individual has paid.

### Export Envelope Numbers

If you want to import event payments into ACS Contributions, you can export envelope numbers.

For example, suppose your church hosts a Spring Break mission trip and requires registrants to sign up through Access ACS, then pay with cash, checks, or through event registration. These payments also count as charitable contributions, so this solution lets you import the payments rather than having to manually add them to ACS Contributions.

To do this, export data to Microsoft® Excel ©, add a column for fund numbers, save it as a .CSV file, import these gifts into ACS Contributions, and post them to ACS General Ledger.

### To export Event Information

1. Select the event from the drop-down list.
2. Select the fields you want to include in the export. You can select individual field options, or you can click **Select All**.
3. Click **Export**. To save the export file, click **Save**. To open the export file, click **Open**.

## View or Export the ACS GL Export for Online Payments

The ACS GL Export for Online Payments report displays online payments for events with a GL Code associated with them.

The report displays transactions sorted by Batch ID and includes the transaction's date, ID, GL Code, event name, and amount. You can view this report or export it, and you can also import it into ACS General Ledger. If you plan to import this report into ACS General Ledger, do not edit the fields.

To generate this report, you must have adequate rights to Event Reports in Access ACS.

### Full Refunds

If a transaction is refunded in full within the same batch, the transaction nor the refund are included in the export.

If a transaction appears in one batch and is refunded in another, the full amount paid displays in the export, but the refund does not display in any export. You must manually enter this refund in General Ledger.

### Partial Refunds

Partial refunds are subtracted from the transaction amount so that only what is received is sent to General Ledger. For example, someone makes a \$100 deposit for a ski trip, then makes a \$50 payment. The next day, the individual asks to have the \$50 refunded. If all transactions are in the same batch, \$100 is sent.

If the transactions are in different batches, you must manually enter the refund.

### To view or export the ACS GL Export for Online Payments

1. In Access ACS, click **Reports**, then **Event Reports**.
2. In the **Report Type** drop down list, select **12. ACS GL Export for Online Payments**.



3. Enter the report's **Start Date** and **End Date**.
4. Select the **Campus** or **Department** the report is for.
5. Select any specific events for the report.
6. To view the report, click **View Report**. To export it, click **Export**.

# Online Giving Reports

The Online Giving Reports area gives you a central place to run and view reports important to online giving functionality and maintenance.

Access ACS - Online Giving Reports from ACS Technologies on Vimeo.

The following reports are available:


- The Online Giving Report
- The Recurring Gifts Report
- The Online Giving Forecast Report
- The Bank Deposit Report

## The Online Giving Report

The Online Giving feature displays the Online Giving Report. The report provides a list of online giving transactions. You can filter the report by the date. You must print this report and import gifts into ACS Contributions before closing the year.

You can import both member and guest transactions from Access ACS into ACS People Suite.

### To view the Online Giving Report

1. Point to **Reports**, then click **Online Giving Reports**.
2. Enter the date range in the **From** and **To** fields, or click  to select the dates from a calendar.
3. In the **Show** drop-down list, select to display **All**, **Members Only**, or **Guests Only** in the Online Giving report.
4. In the **Types** drop-down list, select to display **All Transactions**, **ACH Transactions**, or **CC Transactions** in the Online Giving report.
5. In the **Source** drop-down list, select from which source gifts are given from. Available options are **All**, **Online**, **Mobile**, and **Text**.
6. Click **Go**.
7. To print the report, click **Print**. The Print Preview page displays. On the Print Preview page, click **Print**. When the Print dialog box displays, click **Print**.
8. To export the report, click **Export**. Select to either open the file using Microsoft Excel or save the file to your computer, then click **OK**.

To sort the report, click any of the column headers. For example, to sort by Fund type, click **Fund**

## Guest Givers


You must have ACS 11.7.1.8 to import transactions from guest givers.

Guest givers are contributors who give online without creating an account. On the Online Giving Report, **‡** displays beside a guest giver's contribution.

With ACS 11.7.1.8, you can import guest giver transactions into ACS Contributions and assign them to one record. You don't have to create a new record in ACS for each guest giver; however, if you plan to send statements or track guest givers, you should create new records for each one.

First, set up a single record in ACS People Suite for guest givers.

### To set up a single record for guest givers

1. Log into ACS People Suite.
2. Under **Advanced Tools**, click the **Settings** tab.
3. Select **Contributions** from the drop-down list and click **Go** .
4. Click the **Configuration** tab.
5. Under **Access ACS Guest Giver**, click **Find Person** to assign a record that you can import guest giver contributions to from Access ACS.
6. Select the guest giver record and click **OK**. If you do not already have a guest giver record, click **Add New Family** to create one. We suggest naming this record "Visitor Contributions", "Loose Contributions", or "Guest Giver".
7. To save your changes, click **OK**.

Next, import transactions from Access ACS. When you import a contribution from a guest giver, a yellow flag displays beside that gift.

If a giver had a record that was deleted in ACS, a red flag displays. To include that gift with the guest giver contributions, click **Import As Guest**.

# The Recurring Gifts Report

The Recurring Gifts report displays all of the active recurring gifts entered for your organization.

## To view the Recurring Gifts report

1. Point to **Reports**, then click **Online Giving Reports**.
2. Click the **Recurring Gifts** tab.
3. To export the report, click **Export Grid**. Select to open the file with Microsoft Excel or save the file to your computer, then click **OK**.
4. To print the report, click **Print**.

To sort the list, click a column header. For example, if you want to sort the list by start date, click the **Start Date** header.

# The Online Giving Forecast Report

The Online Giving Forecast Report displays the gifts totals based on date range and fund.

Note: If there is nothing to return based on your search criteria, the message **You currently have no active giving schedules** displays instead of the report grid.

## To view the Online Giving Forecast Report

1. Point to **Reports**, then click **Online Giving Reports**.
2. Click the **Online Giving Forecast Report** tab.
3. Enter a start date and end date in the **From** and **To** fields.
4. If necessary, select a fund from the drop-down list. Otherwise, you can search on the default of **All**.
5. Click **Go**.
6. A Fund Totals panel displays on the right side of the page. If you selected to include all funds in your search, this panel displays the name of each fund and the total amount of the gifts given to the fund in the date range selected. If you searched on one fund, the fund name and total amount of gifts given to the fund in the date range selected displays. The total of all the given funds displays at the bottom of the panel.

### Useful Information

If you select to include all funds in your search and you have more than four funds available, a scroll bar displays in the Fund Totals panel. Use the scroll bar to view the rest of the available funds.

7. The Online Giving Forecast Report displays the following information:
  - Name <Last Name, First Name (Goes By)>
  - Fund
  - Gift Amount
  - Number of Gifts
  - Total Gift Amount
8. To export the report, click **Export Grid**. Select to open the file using Microsoft Excel or save the file to your computer, then click **OK**.
9. To print the report, click **Print**.


# The Bank Deposit Report

The Bank Deposit Report lets you view detailed information about deposits and transactions.

After you view the transactions you can export the information to an Excel spreadsheet. If you export while viewing the Summary Transaction page, all of the available transactions display export. If you export while viewing a specific transaction, only the information displayed about that transaction is exported. To export the report to Excel, click **Export**.

To export the report, in the **I want to...** drop down list, click **Export (.csv)**, then **Go**. To export the report for use in Realm, click **Export (.csv) to Realm**. **To**


## view the Bank Deposit Report

1. Point to **Reports**, then click **Online Giving Reports**.
2. Click the **Bank Deposit Report** tab.
3. In the drop-down list, select the **Deposit Account** you want to view transactions for.
4. Enter the dates for the transactions you want to view in the appropriate fields. To select the dates from a calendar, click .
5. Depending on the merchant account provider you have, click **Go** or **Filter**.

Depending on your merchant account provider, the Bank Deposit Report displays differently. The information does not display if there is no data.

## Additional Field Information

**Deposit Account** –The account you want to return results for. Use the drop-down list to select which account to return results for.

**Deposit Date Between** – The date range you want to return results for. Enter dates using the mm/dd/yyyy format or to select the date from a calendar, click . To prevent the report from timing out, the date range is limited to 90 days.

**Batch Total** – The total amount for the batch returned.

**Batch ID** – Displays the batch processed.

**Receipt Number** – The number of the receipt associated with the Batch ID.

**Filter** – Click to search based on the criteria you entered in the previous fields.

**Reset Filter** – Click to clear the search criteria you entered in the previous fields.

## Viewing deposit details

To view deposit details, click **View Details** for the desired batch.

To print the deposit details window, click **Print**. To export the deposit details window, click **Export**. If you export the window, all of the available contact information for an individual displays.

# Admin Reports and Logs

To help manage your system, Access ACS provides four administrative reports — the online giving report, bank deposit report, update log, and system log.

## Update Log

The update log lists all uploads since the last time it was cleared. It distinguishes between successful and unsuccessful uploads.

### To view the update log

1. Point to **Admin**, then click **Admin Reports**.
2. Click **Update Log**.
3. To clear all log entries except the most recent upload, at the top of the screen, click **Clear Log**.
4. To sort the log, click a column heading.
5. To browse the log, at the top of the grid, click the page number that you want to view.
6. To export the grid as a comma separated values file (.CSV File), click **Export Grid**.

## System Log

The system log lists all login attempts since it was last cleared.

The Log Description column indicates the problem with any unsuccessful sign-in attempts.

### To view the system log

1. Point to **Admin**, then click **Admin Reports**.
2. Click **System Log**.
3. To clear the log, at the top of the page, click **Clear Log**. This clears the log based on your filter selections.
4. To filter entries by user name, enter a **User Name**, then click **Go**.
5. To filter entries by log type, select an item from the **Log Type** drop-down list, then click **Go**.
6. To browse through the log, at the top of the page, click the page number that you want to view.
7. To delete an entry from the log, click **Delete** beside the entry you want to delete.
8. To sort the log, click a column heading.

## Scheduled Giving Audit Log

The Scheduled Giving Audit Log lets you view data without having to access a contributor's page.

You can view scheduled giving updates for a specific contributor, updates made by a specific Access ACS admin, or updates made within a specific date range. You can also export this report.

### To access the Scheduled Giving Audit Log

1. Point to **Admin**, then click **Admin Reports**.
2. Click **Scheduled Giving Audit Log**.
3. Enter the contributor's name or the user name who updated the record. To view only changes made by staff (not contributors), select **Only Staff Changes**.
4. Enter the date range of when the changes were made.
5. To display only new, updated, or gifts changed from active to on hold, select **New, Changed, or Active to On Hold**.
6. To display the report, click **Go**.

# Other Administrative Functions

Here are some additional administrative functions of Access ACS.

- View your Organization's Statistics
- Locate Family, Individual, and Organization Records
- View Web Links
- Set up Global Preferences
- Manage and Send E-mail Notifications
- Add New Features
- ACS and ChurchCast Integration

## View your Organization's Statistics

The Statistics area lets you view tables and graphs for membership, attendance, contributions, and outreach. Statistics tables display for all selected areas, but graphs only display for certain areas.

You can customize the My Statistics page to display only the statistics you want to view. By default, the following statistics display:

- Record Count
- Member Status
- Attendance for the Week Ending
- Gifts and Pledges for Week Ending (most recent Sunday)
- Fund Details
- Outreach Contacts Made
- Small Groups by Category, Individual and/or Attendance
- Opportunities by Category and/or Individual

### To customize the My Statistics page

1. Point to **Statistics**, then click My **Statistics**.
2. On the My Statistics page, click **Customize**.
3. Under each set of Statistics, select the options you want to display. If you select the Attendance option, select a category from the drop-down list.
4. Click **Save**.
5. To print the page, click **Print**. At the top of the Print Preview page, click **Print** to print the current view.

## Membership Statistics

You can view or print statistics tables and graphs for membership information.

The Membership Statistics page displays the record count, member status, age, marital status, family position, how members joined, gender, ZIP code, communion, and user-defined fields and dates. The information displays only if the individual is uploaded.

You can change the view of certain statistics sections to display a bar graph or a pie graph. You can also customize which statistics display on the My Statistics page by clicking **Customize**.

### To view or print membership statistics

1. Point to **Statistics**, then click **Membership**.
2. Click **Print**. The preview page displays.
3. On the preview page, click **Print**.

## Attendance Statistics

You can view or print attendance statistics for certain groups or for a date range. The information displays only the classes and worship uploaded. If no attendance is uploaded, the page does not display.

### To view or print attendance statistics

1. Point to **Statistics**, then click **Attendance**.
2. In the **Select an Attendance Group** drop-down list, select an item.
3. To change the date range, click **Change Date Range**. Enter a new date range, then click **Go**.
4. When the information displays, click **Print**. The preview page displays.
5. On the preview page, click **Print**.

# Contributions Statistics

You can view and print your organization's contribution statistics.

The Contribution Statistics page displays the total pledges and gifts for all funds at the top of the page. If contributions have not been uploaded, the page does not display.

The **Total Gifts** section displays all gifts **Year to Date**, **Quarter to Date**, and **Month to Date**.

The **Total Pledges** section displays **Pledge to Date**, **YTD Pledges Received**, **Difference**, and the **Percent Total Pledges** updates when a gift is applied to a pledge.

## To view or print contributions statistics

1. Point to **Statistics**, then click **Contributions**.
2. To view the previous Contribution Statistics, click **<Previous Week**. To view current statistics, click **Next Week>**.
3. To print the report, click **Print**. When the print preview page displays, click **Print**.

If there are more than ten funds, the ten funds with the most gifts display in Pledges and Gifts by Fund and the remaining funds display grouped together in the All Others section.

# Outreach Statistics

You can view and print statistics for outreach contacts. You can change the view to display a bar graph. The information that displays reflects the individuals uploaded.

## To view and print Outreach statistics

1. Point to **Statistics**, then click **Outreach**.
2. From the drop-down list, select the number of weeks to view. A table displays with the number of contacts made each week.
3. Click **Print**.
4. When the preview page displays, click **Print** to print the list. To print a bar graph, click **Bar Graph**, then click **Print**.

# Small Group Statistics


The Small Groups Statistics page lets you view and print statistic tables and graphs about your small groups.

## To view and print small group statistics

1. Point to **Statistics**, then click **Small Groups**.
2. Click **Print**. The Preview Page displays.
3. On the Preview Page, click **Print**.

This section displays the participation details for your master-level small groups in two ways: **Unique Count** and **Total Count**.

To sort the list, click a column header. To sort the list in descending order, click the same column header.

To view the information as a graph, click .

## Unique Count

**Unique Count** displays the number of different individuals who actually participate in a group. For example, if John Brown participated in three different groups, he would only be counted once in the Unique Count.

## Total Count

**Total Count** displays how many individuals participated in the group. For example, if Scott Maple was a member of three different groups, he would be counted three times in the Total Count.

### Additional Field Information

**Group** — Displays the name of the master-level small group.

**Group Members** — Displays the number of members in the small group.

**Group Leaders** — Displays the number of leaders in the small group.


**Total Individuals** — Displays the total of members plus leaders in the small group.

**Added YTD** — Displays the number of individuals added to the small group over the past year up to the current date.

**Deleted YTD** — Displays the number of individuals deleted from the small group over the past year up to the current date.

This section displays the status of the master-level small groups.

To sort the list, click a column header. To sort the list in descending order, click the same column header.

To view the information as a graph, click .

### Small Groups by Status

**Group** — Displays the name of the master-level small group.

**Parent Level Count** — Displays the number of parent level groups that are within the small group.

**Active Groups** — Displays the number of active small groups within the master-level small group.


**Groups in Recess** — Displays the number of small groups currently on hiatus.

**Inactive Groups** — Displays the number of small groups that are not currently meeting.

**Total Groups** — Displays the total number of small groups for the master-level group.

This section lets you view the small group attendance information for the current week. Select the small group you want to view from the drop-down list.

To sort the list, click a column header. To sort the list in descending order, click the same column header.

1. Point to **Statistics**, then click **Small Groups**.
2. Locate the **Small Group Attendance for** section.
3. Click **change date range**.
4. Enter the **From** and **to** dates for the desired date range. To select the dates from a calendar, click .
5. Click **Go**.  
To display the last week's worth of attendance, click **show past 7 days**.

### Small Group Attendance for

**Group** — Displays the name of the master-level small group.

**Total Enrollment** — Displays the total number of individuals enrolled in the small group.

**Total Present** — Displays the total number of individuals present for the small group.

**% Present** — Displays the total percentage of individuals present for the small group.

**Total Absent** — Displays the total number of individuals not present for the small group.

**% Absent** — Displays the total percentage of individuals absent from the small group.



# Serving Statistics

You can view and print your organization's opportunities statistics.

## To view or print opportunities statistics

1. Point to **Statistics**, then click **Opportunities**.
2. The calculations for **Opportunities by Individuals** are totaled as follows:
  - Members in Opportunities** - Total of all individuals who have volunteered for opportunities who are **Active**.
  - Leaders of Opportunities** - Total of all leaders of opportunities with the closing date greater than or equal to today.
3. The calculations for **Opportunities by Category** are totaled as follows:
  - **Active Opportunities** - Total of all opportunities with a closing date greater than or equal to today.
  - **Closed Opportunities** - Total of all opportunities with a closing date less than today.

These calculations are for the values that display under **Actual Numbers** which are used to create the percentages that display.

4. Click **Print**. The Print Preview page displays.
5. On the Preview Page, click **Print**.

# Locate Family, Individual, and Organization Records

In the Directories area, you can add families or locate families, individuals, and organizations.

You can also perform advanced searches and assign and view connections.

## Locate a Family

Administrators with appropriate rights can search for family records. You may search using either complete or partial names.

For example, enter **S** in the Last Name field to search for all individuals with last names beginning with "S." Click **Run Search**.

### To locate and view family information

1. Point to **Directories**, then click **Locate Family**.
2. In the **Last Name** field, enter the family's last name.
3. In the **First Name/Goes-By Name** field, enter a family member's first name.
4. Click **Run Search**.
5. To view the family's information, click their name.

After searching for the family record or records you want, you can use the **I want to** drop-down list to print mailing labels and online directories. Select the names of the records you want to include in the list or select the check box beside the **Name** column to select all the names in the list.

Click **Add Family** to add a new family record to your organization database. To add a new family record, you must have appropriate rights.

## Add a New Family Record

If you have appropriate rights, you can add new family records to your organization database.

When you add a new family to your database, you must enter information for the head of the household first. Once you enter the head of household and family information, you can add members to the family record. The existing family members, family address information, and family phone number display at the top of the page.

Adding new family records creates a change request. Before the new records display, an administrator must approve the request in ACS People, then upload the changed record to Access ACS.

1. Point to **Directories**, then click **Locate Individuals** or **Locate Family**.
2. At the top of the page, click **Add Family**.
3. On the Add New Family page, enter information for the family and the head of the household.
4. Click **Submit**.

1. Point to **Directories**, then click **Locate Individuals** or **Locate Family**.
2. At the top of the page, click **Add Family**.
3. On the Add New Family page, enter information for the family and the head of the household.
4. Click **Submit and Add Another Family Member**.
5. Enter information for additional family members.
6. Once you enter information for all of the family members, click **Submit**.

### Additional Field Information

**Member Status** – Select the status that you want to assign to the head of the family or the individual. You can define the available member statuses in ACS People Suite. For example, you can define and select Member, Prospect, or Contributor.

**Family Position** – The position for the head of household displays in this drop-down menu. This field reflects the title entered for Head in ACS People. If you do not change the title in ACS People, then Head displays.

For additional family members, select the family position that you want to assign the individual. This field reflects the information entered in ACS People. Each family can contain only one head and one spouse family position type.

## Edit Family Information

You can view, edit and print information related to a family on the View Family Information page.

When you edit the family record, the changes are sent to the Administrator for approval. A photo of the family also displays, if one is available and if the member has selected this option.

If a member selects **Do not display photos when viewing individual or family information** a **View Photo** link displays.

If the member does not have rights to view photos, this area is blank.

#### To edit family information and/or pictures

1. Point to **Directories**, then click **Locate Family**.
2. In the **Last Name** field, enter the family's last name.
3. On the Family Information page, click **Edit**.
4. Edit the family record or click **Family Photo** to edit or delete the picture. Current picture cannot be deleted.
5. Click **Submit** to send a change request to the Administrator or **Cancel** to return to the previous screen.

#### Note

Selecting **Do not display photos when viewing individual or family information** turns photos off for the individual member only. Staff Members and Lay Leaders with rights to photos can view all photos.

#### Family Information

**Miscellaneous Information** – Displays family user defined fields.

**Family Members** – Displays a list of family members and their family positions. Click an individual name to view the individual's record.

**Family Photo** – The family photo displays if one is available and if the member has rights to view photos, unless the member has selected to view no photos.

## Print Mailing Labels

You can print individual or family mailing labels from search results or group rosters.

#### To print mailing labels

1. Select the individuals for whom you want to print mailing labels. To print mailing labels for all individuals, select the check box next to the **Name** column.
2. In the second **I want to** drop-down list, select **Print Mailing Labels** and click **Go**.
3. On the Mailing Labels page, in the **Label Type** section, select the type of labels you want to print.
4. In the Label Selection section, select either **Avery Label 5160 Laser (3-Up)** or **Avery Label 5161 Laser (2-Up)**.
5. To preview the mailing labels, click **Preview**. To print the mailing labels, click **Print**.

## Locate an Individual

Under Locate Individual, you can view an individual's record, add a new individual record, e-mail an individual, assign small group connections, add comments, and more.

## View an Individual Record

If you have appropriate rights, you can search for an individual's record. You can search using either complete or partial names. For example, enter **S** in the **Last Name** field to search for all individuals with last names beginning with "S." Click **Run Search**.

If your organization records are available and you have appropriate rights, organization information for the search results displays instead of the contact information. To view an organization's information, click the organization name.

To export information to Microsoft Excel, click **Export Grid**.

Use the **I want to** drop-down list to:

- Add comments
- Send a group e-mail
- Print mailing labels
- Print online directories

On this page, click **Add Family** to add a new family record to your organization database.

#### To locate and view individual information

1. Point to **Directories**, then click **Locate Individual**.
2. In the **Last Name** field, enter the individual's last name.
3. In the **First Name/Goes-By Name** field, enter the individual's first name.
4. Click **Run Search**.
5. To view the individual's information, click the name.

# View an Individual's Attendance Markings

When you view an individual profile, you can view class, activity, and small group attendance markings for the individual. If class, activity, or small group attendance information is not available, the View Attendance links do not display. To view attendance markings, you must have appropriate rights.

To set the number of attendance marking entries that display on each page, select a number from the **Records Per Page** drop-down list.

## To view group attendance

1. Point to **Directories**, then click **Locate Individual**.
2. On the Locate Individual page, enter your search criteria and click **Run Search**.
3. If a list of search results displays, click the name of the individual whose profile you want to view.
4. On the Individual Information page, click **View Attendance** in the Classes, Activities, or Small Groups area.
5. In the **Select Group** drop-down list, select the group for which you want to view attendance markings.

# View an Individual Profile

The My Profile/View Individual tab is divided into subtabs. Depending on your rights, all or several of the following tabs display:

- Profile
- Serving
- Organization
- Groups
- Event Setup
- Comments

Changes do not display until they are approved by an administrator.

# Information Displays

The tabs available on the My Complete Profile page change based on whether you are viewing your personal information or another member's information.

Personal Information	Another Individual's Information
My Profile	View Individual
My Connections	Connections
My Giving History	Giving History
My Pledge History	Pledge History


# Individual Information

Individual information (name, address, phone number, and e-mail address) always displays across the top of all of the My Complete Profile pages. If available, a photo of the individual displays as well. Users must have rights to view photos.

To view a map of the address the individual entered, click **View Map** beneath the address.

To send the user an e-mail, click the e-mail address.


Editing personal information creates a change request. An administrator must process this change request inside ACS People Suite, then upload the record to Access ACS to display the changes.

1. Click **Edit** or click the **Edit**  icon.
2. Make any necessary changes and click **Submit**.

The individual's family member information displays beside her individual information section. To view information about a family member, click her name.

With appropriate rights, you can add family members to the individual's record.

Adding new family members creates a change request. Before the new members display, an administrator must approve the request in ACS People, then upload the changed record to Access ACS.

1. Click **Add new family member** .
2. Enter information about the new family member. Required fields are marked with a red asterisk.
3. If you are finished entering family members, click **Submit**. To continue adding family members, click **Submit and Add Another Family Member**.

# View Individual Information

You can view information related to an individual on the View Individual page. You can also view and print contributions for current and previous years, view a map, and edit the record.

The Individual Information section displays an individual's name, company name, if applicable, primary address and phone number. A photo of the individual also displays, if one is available and if the member has selected this option.

If a member selects **Do not display photos when viewing individual or family information**, a **View Photo** link displays. Click **View Photo** to display the photo. If a member does not have rights to view photos, the area is blank.

Note: Selecting **Do not display photos when viewing individual or family information** turns photos off for the individual member only. Staff Members and Lay Leaders with rights to photos can view all photos.

The Contact Information section displays an individual's contact preference, e-mail addresses, phone numbers, and addresses.

The Personal Information section displays an individual's personal status including title, first name, middle name, goes by name, last name, suffix, gender, family position, date of birth, marital status and other user-defined information.

On the **Other Relationships** tab in View Individual, you can view an individual's other relationships. The information on this tab syncs with the information on the **Family** tab in View/Edit Individual in ACS People Suite.

This tab lets administrators view more information about an individual's family. For example, if someone in your congregation passes away, you can access this tab to find family members your pastor or bereavement team may want to contact or check on.

The **Other Relationships** tab only displays if other relationships exist for the individual in ACS People Suite, and the information is view-only in Access ACS. You can add or edit relationships inside ACS People Suite.

1. In Access ACS, navigate to **Directories > Locate Individual**.
2. Enter the **Last Name** or **First Name/Goes By Name** to search for the individual, then click **Run Search**.
3. In the search results, click on the individual whose other relationships you want to view.
4. Click on the **Other Relationships** tab. The family members' names and relationships display.

In this section you can add, edit, and delete addresses, phone numbers, and e-mail addresses.

The Classes section displays the attendance group information for an individual including **Group**, **Division**, **Department**, and **Class**. Also included is the individual's **Position** in the class (member, teacher, aide), and **Status** (Member or Guest).

## Additional Field Information

**Show History** – Displays all classes the individual has ever been enrolled in. When Show History is selected the wording changes to Show Current. Click **Show Current** to display current classes.

**View Attendance** – Click to view attendance markings for a class.

**Class link** – Click to view the class roster. You can export to Excel, send a group e-mail, print mailing labels, print an online directory, and print a class roster report.

The Activities section displays the activities an individual is enrolled in, including the **Category**, **Element 1**, **Element 2**, **Element 3**, and **Element 4**.

## Additional Field Information

**Show History** – Displays all activities the individual has ever been enrolled in. When Show History is selected the wording changes to Show Current. Click **Show Current** to display current activities.

**View Attendance** – Click to view attendance markings for an activity.

**Activity Link** – Click to view the activity roster. You can export to Excel, send a group e-mail, print mailing labels, print an online directory, and print an activity roster report.

## Additional Field Information

**Member Name** – Displays any other individuals in the church database that are in the individual's family group. Click a name in the list to view their personal information.

**Family View** – Click to view, edit, or print family information.

## Add a New Individual

You can add a new individual to your organization's records. This creates a new family in your organization's records.

After you enter the information, Access ACS creates a change request. An administrator must approve the change request in ACS People Suite and upload records to Access ACS before the individual displays.

The **First Name** and **Last Name** fields and the **Record Type** drop-down list are required. In the **Date of Birth** field, you must enter the date in MM/DD/YYYY format (For example, 04/17/1983), or select a date from the calendar.

### To add a new individual

1. Point to **Directories**, then click **Locate Individual**.
2. On the Locate Record page, click **Add Family**.
3. Enter the individual's information.
4. Click **Submit**.

## E-mail an Individual

You can e-mail an individual through Access ACS.

### To e-mail an individual

1. Point to **Directories**, then click **Locate Individual**.
2. In the **Last Name** field, enter the individual's last name.
3. In the **First Name/Goes-By Name** field, enter the individual's first name.
4. Click **Run Search**.
5. To view the individual's information, click the name.
6. On the Individual Information page, in the **E-mail Address** section, click the e-mail address you want to send the e-mail to.
7. Your default e-mail program opens. The selected e-mail address displays in the **To** field. Enter the remaining information and send the e-mail.

## Assign Small Group Connections

Small group connections are assigned to small group leaders when members request information about small groups. When connections are assigned, small group leaders must contact those members. They can then add members to the small groups, reassign the connections to other groups, or close the connection without adding them groups or reassigning the connections.

If you have appropriate rights, you can manually assign small group connections. After you assign a connection, the small group leader receives a notification e-mail about the connection.

If a connection has comments, they display in the grid, and you can click on the **Description** to read the full comment.

Useful Information: You do not have to manually assign all connections. Member users can sign in and request to join available small groups.

### To assign a small group connection

1. Point to **Directories**, then click **Locate Individual**.
2. In the **Last Name** field, enter the individual's last name.
3. In the **First Name/Goes-By Name** field, enter the individual's first name, then click **Run Search**.
4. Click the name of the individual whose record you want to view.
5. On the **Individual Information** page, click **Connections**.
6. Click **New Connection**.
7. Under **Select Type of Connection**, select **Small Groups Connection** and click **Next**.
8. Enter the group leader's **Last Name**, **First Name**, or the **Group Name**, then click **Run Search**.
9. If necessary, enter additional information in the **Remarks** text box and click **Next**.
10. Click **Submit**.

## View Giving History

Admins Only: If you are not an administrative user, you cannot perform the operations in this section.

The Giving History tab displays an individual's contribution history for a selected year. The individual's member picture, personal information, and family information display across the top of the tab.

### To view contributions




1. Point to **Directories**, then click **Locate Individual**.
2. Click the name of the individual whose giving history you want to view.

3. Click the **Giving History** tab.
4. To view the individual's ten most recent contributions, click **10 Most Recent Contributions**.
5. To view all of the individual's contributions, click **Show All**.
6. To view only contributions made in a specific date range, click **During Date Range**. Enter the **Start Date** and **End Date**, then click **Go**.

Recent online contributions may not display until the transaction is posted to your church's financial records.

## View Pledge History

The **Pledge History** tab displays the selected individual's pledge information for the current and past year. The individual's member picture, personal information, and family information displays across the top of the tab.

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

The total of the individual's pledges given in the selected year displays after **Total Given to Pledges in <year>**. If any money is required to meet an established pledge goal, the amount displays after **Remaining Balance**. If a pledge is forgiven, the word **Forgiven** displays instead of the progress bar, and the balance is \$0.00.

- To add a pledge, click **Add Pledge**.
- To make a contribution from the Pledge History page, click **Give Online**.
- To change the year you are viewing pledges for, click the **Pledge Summary for** drop-down list.

### To access pledge history

1. Point to **Directories**, then click **Locate Individual**.
2. Click the name of the individual whose pledge history you want to view.
3. Click on the **Pledge History** tab.

## Add Comments to Individual, Family, and Organization Profiles

Administrators and staff members with appropriate rights can view and add comments for an individual, family, or organization. You can also edit and delete pending comments.

Only comment types uploaded to Access ACS by the administrator display in the **Comment Type** list box. You cannot add new comment types in Access ACS.

When you enter a new comment or edit a comment, Access ACS creates a change request. An administrator must approve this request inside ACS People Suite and upload records to Access ACS before the change displays.

To edit a pending comment, click the comment date.

To remove a pending comment, click **Remove** . Once the comment is approved, you cannot delete it.

Note: Individuals can only view comments about other individuals. Comments entered for logged in individual do not display.

1. Locate an individual record.
2. On the **View Individual** tab, click the **Comments** subtab.
3. In the Family Comments section, click **Add**.
4. Select a **Comment Type**.
5. Enter a **Comment Date**. By default, the system date displays.
6. Enter the comment in the text box.
7. To save the comment, click **Add Comment**. To return to the previous page without saving the comment, click **View Comments**.

1. Locate an individual record.
2. On the **View Individual** tab, click the **Comments** sub-tab.
3. In the Individual Comments section, click **Add**.
4. Select a **Comment Type**.
5. If necessary, enter a **Comment Date**. By default, the current date displays.
6. Enter the comment in the text box.
7. To save the comment, click **Add Comment**. To return to the previous page without saving the comment, click **View Comments**.

1. View the Organization Comments page.
2. On the Organization Comments heading bar, click **Add**.
3. In the **Comment Type** drop-down list, select the type of comment you want to add.
4. If necessary, enter the **Comment Date**. By default, the current date displays.
5. Enter the comment in the text box.
6. Click **Add Comment**. The Organization Comment page displays. The new comment displays in the **Pending Comments** section.

# Export Individual Information to Microsoft Excel

You can export individual and organization profile information to Microsoft™ Excel .

When you export information to Excel, you can format and organize the data based on your needs. Access ACS lets you select the profile information that you want to export. Using this feature, you can combine profile information into a single report.

Once you export the information to Excel, you can either open or save the file. By default, Access ACS creates the export file in Comma Delimited (CSV) format. This format lets you open the file in any application that supports CSV files.

## To export to Excel

1. Select the individual or organization profiles that you want to export. To export all profiles, select the check box next to the **Name** column heading.
2. Select **Export to Excel** from the Action drop-down list, then click **Go**.
3. Select the fields that you want to export, then click **Export**.
4. Click the **Click Here to Save/Open your exported records** link. A **File Download** dialog box displays.
5. To view the information in your browser, click **Open**. To view the information in Excel, click **Save**.



# Locate an Organization

The Organization Information page displays the information associated with an organization and allows you to search for that information.

## Using Filters

You can filter your search results by organization level. Organization levels are user-defined in ACS. To locate organizations, you must have appropriate rights.

In the **Organization Name** field, you can search on reference names. A reference name is the name commonly used to refer to an organization. For example, the reference name for Second Baptist Church can be SBC.

## Using Searches

When searching for organizations, you can enter partial search criteria. For example, to search for organizations with names beginning with **S**, type **S** in the **Organization Name** field.

To search for an exact match of your search criteria, select **Exact Match Only**. To customize the number of search results that display on each page, select an item in the **Records Per Page** drop-down list. Once your search results display, click an organization name to display the organization's profile.

### To locate an organization

1. Point to **Directories**, then click **Locate Organization**. The Locate Organization page displays.
2. If necessary, in the **Organization Level** drop-down list, select an item. By default, **<Show All Organizations>** is selected.
3. In the **Organization Name** field, enter your search criteria.
4. Click **Run Search**. The search results display.

### To view all organizations

1. Point to **Directories**, then click **Locate Organization**.
2. In the **Organization Level** drop-down list, make sure **<Show All Organizations>** is selected.
3. Click **Run Search**. The results display on the Locate Organization page.

# View Organization Information

Once you locate an organization, you can view organization information. Organization and Primary contact information displays across the top of the page, and all related pages.

The page is divided into Profile, Staff, Activities, and Comments subtabs that contain the most recent organization information.

The organization's information (name, address, phone number, and e-mail address) displays across the top of all of the Organization Profile pages. If available, the organization's photo displays also. You must have rights to view photos to see this feature.

To view a map of where the organization is located, click **View Map**.

To send the organization an e-mail, click the e-mail address.

The organization's primary contact information displays beside the organization information section. To send an e-mail to the organization's primary contact, click his name.

From this page, you can view and edit the organization's information.

### To view and edit an organization

1. Point to **Directories**, then click **Locate Organization**. The Locate Organization page displays.
2. If necessary, in the **Organization Level** drop-down list, select an item. By default, **<Show All Organizations>** is selected.
3. In the **Organization Name** field, enter your search criteria.
4. Click **Run Search**. The search results display.
5. Beside the organization you want to edit, click **Edit**.
6. Make the necessary changes to the **Organization Information** and **User Defined fields**.
7. Click **Submit**.

Note: Editing an organization's record creates a change request.

To display the edits, an administrator must approve this change request inside ACS People Suite and upload the records to Access ACS.

# Work with Organization Contact Information

The Profile tab contains important contact information about the organization.

## Contact Information

This section displays the addresses, phone numbers, and e-mail addresses the organization has entered. On this page you can add, edit, or delete any of the available information.

Adding, editing, or deleting an organization's contact information creates a change request. Before your changes display, an administrator must approve this request inside ACS People Suite and upload the changes to Access ACS.

## Addresses

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

1. Click **Add**.
2. In the **Add/Edit Address** dialog box, enter the necessary information. Required fields are marked with a red asterisk.
3. Click **Submit**.


## Phone Numbers

The organization can enter as many phone numbers as it needs. If a phone number is unlisted, then displays  beside it.

1. Click **Add**.
2. In the **Add/Edit Phone Number** dialog box, enter the necessary information. Required fields are marked with a red asterisk.
3. Click **Submit**.

## E-mail Addresses

The number of e-mail addresses available depends on how many e-mail address types have been set up. If the organization has a preferred e-mail address, the word Preferred displays beside it in the selected emphasis color.


1. Click **Add**.
  2. In the **Add/Edit E-mail Address** dialog box, select the **E-mail Type** and enter the e-mail address.
  3. To mark the e-mail address as preferred, select **Preferred E-mail**.
  4. Click **Submit**.
- 
1. Click **Edit**  beside the e-mail address you want to edit.
  2. In the **Add/Edit E-mail Address** dialog box, select the new **E-mail Type** and enter the e-mail address.
  3. If the e-mail address entered is preferred, select **Preferred E-mail**.
  4. Click **Submit**.

# Work with Organization Staff Records

The organization Staff tab displays important information regarding the staff members and their records. This page lets you view and manage staff records for your organization.

Adding, editing, resigning or deleting a staff record creates a change request. To display your changes, an administrator must approve the request inside ACS People Suite and upload the records to Access ACS.

1. Point to **Directories**, then click **Locate Organization**. The Locate Organization page displays.
2. If necessary, in the **Organization Level** drop-down list, select an item. By default, **<Show All Organizations>** is selected.
3. In the **Organization Name** field, enter your search criteria.
4. Click **Run Search**. The search results display.
5. Select the organization, then click **Add Staff**.
6. Click **Find**, then enter a **Last Name** and **First/Goes By Name**.
7. Click **Find**.
8. Click **Select** beside the individual you want to add.
9. Select the individual's **Position**, **Position Level**, and **Status** from the drop-down lists.
10. Select a mailing address.

11. Select how the staff member is affiliated with the organization. When you select the staff member's affiliation, you have the option to enter the dates when he or she was Ordained and Licensed. You can enter a date in the field, or click  to select the date from a calendar.
12. Click **Submit**.

## Print Staff Mailing Labels

You can print mailing labels for individuals in your organization who do not have an e-mail address or who prefer to receive information through the mail.

1. Locate the organization.
2. Select the record or records you want to print mailing labels for.
3. Under **I want to**, select **Print Mailing Labels** and click **Go**.
4. Select a **Label Type** and **Label Selection**.
5. Click **Preview**. Review the labels and make sure the information is correct.
6. Point to **File**, then click **Print**.
7. In the **Print** dialog box, under **Page Handling**: Set **Page Scaling** to **None**. Clear the **Auto-Rotate** and **Center** options.
8. Click **OK**.

## Print a Staff Directory

Printing a staff directory can be very useful in the day-to-day running of your organization.

1. Point to **Directories**, then click **Locate Organization**.
2. If necessary, in the **Organization Level** drop-down list, select an item. By default, **<Show All Organizations>** is selected.
3. In the **Organization Name** field, enter your search criteria.
4. Click **Run Search**.
5. When the results display, select the organization you want to print a staff directory for.
6. On the **Staff** tab, select the staff records you want to include.
7. Under **I want to**, select **Print Directory** and click **Go**.
8. Click **View an Individual Directory**, **View a Family Directory**, **View an Individual Directory with photos**, or **View a Family Directory with photos**.
9. When the directory displays, click **Print**.

## Export Staff Roster Information

You can export your staff roster information.


1. Locate the organization, then click **Export Grid**.
2. Select to open the file in Microsoft Excel, or the save the file to your computer.
3. Click **OK**.
1. Locate the organization.
2. Select the staff records you want to export.
3. Under **I want to**, select **Export to Excel**.
4. Select the fields you want to include in your report, then click **Export**.

## Send a Message on Twitter and Facebook


You don't have to just send an e-mail to alert your group. You can also post to Twitter and Facebook.

You can enter the message to post in the **Message to Post** section, or to post the message you plan to e-mail click **Refresh using message above**. If your message is longer than 140 characters, Twitter shortens the message and provide a URL that displays the full message.

### Twitter

1. Click the  beside **I want to tweet or post to Facebook**, then click **Manage Accounts**.
2. In the Social Networking dialog box, click **Add Twitter Account**.
3. If prompted, enter your **Username or email** and **Password**.
4. Click **Authorize app**.

You are taken to the Send a Message page and your Twitter account displays in the **I want to tweet or post to Facebook** section.

1. Click the  beside **I want to tweet or post to Facebook**, then select the Twitter account or accounts you want to tweet from.
2. Either enter your tweet in the **Message to Post** textbox, or click **Refresh using message above** to insert your e-mail message.

3. Click **Send Message**.

The tweet posts to the selected Twitter account or accounts.


## Facebook

1. Click the  beside **I want to tweet or post to Facebook**, then click **Manage Accounts**.
2. In the Social Networking dialog box, click **Add Facebook Account**.
3. If prompted, enter your **Email** and **Password**.
4. In the Request for Permission box, click **Allow**.

You are taken back to the Send a Message page and your Facebook account displays in the **I want to tweet or post to Facebook** section.

Info


If the Facebook account has a user name associated with it, the user name displays. If it does not have a user name associated with it, then "Facebook Account" displays instead.

1. Click the  beside **I want to tweet or post to Facebook**, then select the Facebook account or accounts you want to post to.
2. Either enter your post in the **Message to Post** textbox, or click **Refresh using message above** to insert your e-mail message.
3. Click **Send Message**.

The message posts to the selected Facebook account or accounts.

## View Staff History

The **Show History** link lets you view the staff roster history of the organization.

1. Locate the organization.
2. Click **Show History** in the right corner of the grid. All of the staff members ever associated with the organization display.
3. To view staff by roster date, click **View by Date**.
4. The current date displays in the **Effective Date** field by default. Enter a new date or click  to select a date from the calendar, then click **Go**.

## View and Add Organization Comments

From the Organization Information page, you can view and add organization comments.

When you add a comment, it displays in the **Pending Comments** list and creates a change request. An administrator must approve the change request in ACS People Suite and upload the records in Access ACS before the comment displays in the **Organization Comments** list. You can edit and delete pending comments.

To customize the number of comments that display on each page, select an item from the **Records Per Page** drop-down list. To edit a pending comment, click the comment date.

To delete a pending comment, click **Delete** .

1. Point to **Directories**, then click **Locate Organization**.
2. Select an **Organization Level** and **Organization Name**.
3. Click **Next**.
4. Click the organization's name.
5. On the **View Organization** tab, click the **Comments** subtab.
6. Click **Add Comment**.
7. Select a **Comment Type** and enter the **Comment**.
8. Click **Add Comment**.

## View an Organization's Activity Attendance

From the Organization Information page, you can view activity attendance information for the organization.

You can view both current and past activities. When current activities display, a **Show History** link displays.

To display past activities, click **Show History**. To display current activities, click **Show Current**. If attendance markings are not available, they do not display.

**To view activity attendance**

1. Point to **Directories**, then click **Locate Organization**. The Locate Organization page displays.
2. If necessary, in the **Organization Level** drop-down list, select an item. By default, **<Show All Organizations>** is selected.
3. In the **Organization Name** field, enter your search criteria.
4. Click **Run Search**. The search results display.
5. Select the organization you want to view attendance for.
6. On the **Activities** heading bar, click **View Attendance**.
7. In the **Select Group** drop-down list, select the activity.

## View Organization Connections

To view outreach information, you must upload your ACS Connections records.

Completing an outreach assignment in Access ACS creates a change request. An administrator must approve the change request inside ACS People Suite and upload the changes to Access ACS before they display. For more information, see [Uploading Your ACS Records](#).

To view both incomplete and complete outreach assignments, select **Include completed assignments**. To filter the outreach assignment list by date, enter a start date and end date in the **Date Range** fields.

The **Connections** tab displays all of the Outreach connections the organization has. You can view the **Contact Date**, **Description**, **Assigned To**, and **Stat us** of the organization's connections.

### To view and complete outreach assignments

1. Point to **Directories**, then click **Locate Organization**. The Locate Organization page displays.
2. If necessary, in the **Organization Level** drop-down list, select an item. By default, **<Show All Organizations>** is selected.
3. In the **Organization Name** field, enter your search criteria.
4. Click **Run Search**. The search results display.
5. Select the organization whose outreach assignments you want to view.
6. At the top of the **Organization Information** page, click **Connections**.
7. To complete an outreach assignment, click the description of the assignment that you want to complete, then click **Complete Contact**.
8. In the **Responses** list, select as many items as necessary.
9. If necessary, enter a comment, then click **Submit**.

### Additional Field Information

**View Map** – Click to display a map of the organization's primary location.

**Print** – Click to display a printer-friendly version of the page.

**Outreach** – Displays the organization's outreach connections.

**Date Range** – Enter a date range to filter the outreach connections by date.

**Include complete assignments** – Clear this option to display only incomplete connections.

**Connection Contact History** – Displays connection contact history for small groups.

**Assign Connection** – Click to assign the organization to a small group. To view an entry, click the contact type.

## View an Organization's Giving History

The Giving History tab displays the organization's contribution history for a selected year. The organization's picture, information, and primary contact information display across the top of the tab.

### To view an organization's contributions

1. Point to **Directories**, then click **Locate Organization**. The Locate Organization page displays.
2. If necessary, in the **Organization Level** drop-down list, select an item. By default, **<Show All Organizations>** is selected.
3. In the **Organization Name** field, enter your search criteria and click **Run Search**.
4. Click on the organization whose contributions you want to view.
5. Click the **Giving History** tab.
6. To view the organization's ten most recent contributions, click **10 Most Recent Contributions**.
7. To view all of the organization's contributions, click **Show All**.
8. To select a previous year, click the **For Year** drop-down list.
9. To view only contributions made during a specific date range, click **During Date Range**. Enter a **Start Date** and **End Date**.
10. Click **Go**.

# View an Organization's Pledge History

The Pledge History tab displays the selected organization's pledge information for the current and past year. The organization's picture, information, and primary contact information displays across the top of the tab.

The total of the organization's pledges given in the selected year displays after **Total Given to Pledges in <year>**. If any money is required to meet an established pledge goal, the amount displays after **Remaining Balance**. If a pledge is forgiven, the word **Forgiven** displays instead of the progress bar, and the balance is \$0.00.

## To view an organization's pledge history

1. Point to **Directories**, then click **Locate Organization**. The Locate Organization page displays.
2. If necessary, in the **Organization Level** drop-down list, select an item. By default, **<Show All Organizations>** is selected.
3. In the **Organization Name** field, enter your search criteria, and click **Run Search**.
4. Click on the organization whose pledge history you want to view, then click the **Pledge History** tab.
5. To change the year you are viewing pledges for, click the **Pledge Summaryfor** drop-down list.
6. To print pledge history, click **Print**.

# Advanced Search

You can search for individuals using a combination of search criteria on the Advanced Search page. The criteria include activities, classes, small groups, birthdays, addresses, member statuses, user-defined fields, and comments.

You must have appropriate rights to access advanced searches.

## To access Advanced Search

1. Point to **Directories**, then click **Advanced Search**.
2. Click on one of the links to expand your search, then click **Next**.

# Examples of Searches

When you use the Advanced Search feature, Access ACS uses two types of searches OR searches and AND searches. The search criteria you select determines the type of search Access ACS uses.

The following table provides information about when each type is used:

Section Name	Search Type Between Sections	Search Type Within Section
Activities	<ul style="list-style-type: none"> <li>• OR with classes and small groups</li> <li>• AND with other sections</li> </ul>	OR
Classes	<ul style="list-style-type: none"> <li>• OR with activities and small groups</li> <li>• AND with other sections</li> </ul>	OR
Small Groups	<ul style="list-style-type: none"> <li>• OR with activities and classes</li> <li>• AND with other sections</li> </ul>	OR
Birthday	AND	AND
Address Fields	AND	AND
Individual Fields	AND	OR
User-Defined Fields	AND	OR
Comments	AND	AND

When Access ACS uses the **OR** search type, the search results display individuals who meet at least one of your search criteria.

**With Multiple Sections** - When you select multiple search criteria from the activities, classes, and small groups sections, Access ACS uses the OR search type. The search results include individuals who belong to at least one of the groups you select.

For example, you want to find all individuals who belong to the Music Program activity or the Women's Sunday School class. You select the activity and the class and run the search. Your search results display members who belong to either the Music Program activity or the Women's Sunday School class.

**In the Same Section** - When you select multiple search criteria from the same section, Access ACS uses the OR search type. The search results include individuals who match at least one of the search criteria that you select.

For example, you want to find individuals who either attend Sunday school only or attend bible study only. You can select the member status options and run the search. Your search results display members who either attend Sunday school only or attend bible study only.

When Access ACS uses the **AND** search type, the search results display individuals who meet all of your search criteria.

**With Multiple Sections** - When you select multiple search criteria from some sections, Access ACS can use the AND search type. The search results include individuals who meet all of your search criteria.

For example, you want to find individuals who belong to the 40 Days of Purpose small group and who have birthdays in July. When you run the search, individuals who belong to the group and have birthdays during July display.

**In the Same Section** -When you select multiple search criteria from a single section, Access ACS can use the AND search type. The search results include individuals who meet all of your search criteria.

For example, you want a list of individuals who live in Florence, South Carolina, on Palmetto Street. In the Address section, you enter the search criteria and run the search. The search results display individuals who live in Florence, South Carolina, and on Palmetto Street.

## Search on Activities

With Advanced Search, you can search on multiple activities. Individuals who are members of at least one of the activities selected are included in the search results. Each activity is associated with four elements that can further define the activity.

### To search on an activity

1. Point to **Directories**, then click **Advanced Search**.
2. To expand the section, click **Select Activities**.
3. Select an activity from the **Category** drop-down list.
4. Select items for **Element 1, 2, 3, and 4**.
5. Click **Select**. The activity displays in the **Included Activity** list.
6. To begin searching, click **Next**. To search on multiple activities, repeat steps 4 - 6.

Tip: To select additional search criteria, click another search criteria name.

## Search on Addresses

With Advanced Search, you can search on any combination of address fields. You can enter complete or partial information in the **Address Line 1**, **Address Line 2**, and **ZIP Code** fields.

To search on a city or country, you must enter complete address information in the **City** and **Country** fields.


### To select address fields for an advanced search

1. Point to **Directories**, then click **Advanced Search**.
2. To expand the section, click **Select Address Fields**.
3. Enter your search criteria.
4. To begin searching, click **Next**. To select additional search criteria, click another search criteria name

## Search on Birthdays

With Advanced Search, you can search on date, year, and age.

In the Select Birthday section, you can search on a single date, year, or age. You can also search on date, year, or age ranges.

1. Point to **Directories**, then click **Advanced Search**.
2. To expand the section, click **Select Birthday**.
3. To search for one date, in the **Select the date range** fields, enter the month and day (mm/dd) of the birthday, or click  to select a date from the calendar.
4. To search on a date range, in the **Select the date range** fields, enter the beginning month and day (mm/dd) in the **From** field and the ending month and day in the **To** field.
5. To begin searching, click **Next**. To select additional search criteria, click another search criteria name.

## Search on Classes

With Advanced Search, you can search on multiple classes.

Individuals who belong to at least one of the selected classes display in the search results. To remove classes from the Included Classes list, click

**Remove** 

### To search on classes

1. Point to **Directories**, then click **Advanced Search**.
2. To expand the section, click **Select Classes**.
3. Select an item from the **Group** drop-down list.
4. To search by **Class Code**, select an item from the drop-down list.
5. To search by **Division**, **Department**, and **Class**, select an item from each drop-down list.
6. Click **Select**. The class displays in the **Included Classes** list.
7. To begin searching, click **Next**. To search on multiple classes, repeat steps 4 - 7.

Tip: To select additional search criteria, click another search criteria name.



# Search on Comments

With Advanced Search, you can search on comments left on individual profiles. You can search on any text and choose to search for any words, all words, or an exact phrase.

## To search on comments

1. Point to **Directories**, then **Advanced Search**.
2. To expand the section, click **Select Comment Words**.
3. Enter the text in the field and select a search method.
4. Select to search for **Any Words**, **All Words**, or an **Exact Phrase**.
5. To begin searching, click **Next**. To select additional criteria, click another search criteria name,

# Search on Individual Fields

With Advanced Search, you can search for information regarding an individual's gender, family position, marital status, and member status.


## To search on individual fields

1. Point to **Directories**, then click **Advanced Search**.
2. To expand the section, click **Select Individual Fields**.
3. Select **Gender**, **Family Position**, **Marital Status**, or **Member Status**.
4. Choose other criteria to narrow your search. For example, if you select **Gender**, you must then select either **Male** or **Female**. Add criteria, then click **Select**.
5. To begin searching, click **Next**. To add additional search criteria, click another search criteria name.

# Search on Preferred List Items

With Advanced Search, you can search on preferred list items associated individual profiles. Select the criteria you want to use in your search from the **Select Preferred List Item** drop-down list.

## To search on preferred list items

1. Point to **Directories**, then **Advanced Search**.
2. To expand the section, click **Select Preferred List Items**.
3. Select the criteria you want to use in your search from the **Select Preferred List Item** drop-down list. To remove a preferred list item from your search, click .
4. Click **Select**.
5. To begin searching, click **Next**. To select additional criteria, click another search criteria name, then click **Select**.

# Search on Small Groups

With the appropriate rights, you can search on Small Groups.

## To search on a small group

1. Point to **Directories**, then click **Advanced Search**.
2. To expand the section, click **Select Small Groups**.
3. In the **Groups A-L** or **Groups M-Z** drop-down lists, select the small group you want to search. You can only select one group.
4. Click **Select**. The small group displays in the **Included Small Groups** list.
5. To begin searching, click **Next**. To search on multiple small groups, repeat steps 4 - 5.

Tip: To select additional search criteria, click another search criteria name.

# Search on User-Defined Fields

With Advanced Search, you can search on multiple user-defined fields.

## To search on user-defined fields

1. Point to **Directories**, then click **Advanced Search**.
2. To expand the section, click **Select User-Defined Fields**.
3. In the **Select Field** drop-down list, select an item.
4. If a **Search For** drop-down list displays, select an item. If a **Search For** field displays, enter the search criteria. If **From** and **To** fields display, enter a date or date range.
5. Click **Select**. The search criteria displays in the **Selected Fields** list.
6. To begin searching, click **Next**. To search on multiple user-defined fields, repeat steps 4 - 6.

# Connections

In the Connections area, you can create outreach connections, enter connection results, and more.

Two types of connections are available in Access ACS: **Outreach Connections** and **Small Group Connections**.

Outreach Connections are directly linked to the Connections module in the ACS desktop, and Small Groups Connections are designed to connect individuals with small groups. To access all functions of Connections in Access ACS, you must own the Connections module in ACS for Windows.

The **My Assigned Outreach Connections** section only displays current, incomplete connections. To view all connection assignments, click **View More**.

To determine whom to approach if clarification is needed, you can train your staff and volunteers to preface their comments with their initials.

## To access Connections

1. In Access ACS, click **Directories**, then **Connections**.
2. To access outreach connections, click on the **Outreach** tab. To work with small group connections, click on the **Small Groups** tab.

# Work with Outreach Connections

Outreach Connections are directly linked to the Connections module in the ACS desktop.

On the Outreach Connections page, you can view a list of leaders who have contacts assigned to them for the last seven days, change the date range, sort the leader list, and view contacts for each leader. **Overdue**, **Incomplete**, and **Complete/Pending** contacts display.

To sort the connection list, click the column header you want to sort by.

- A contact is **Incomplete** if it has not been marked complete in either ACS or Access ACS.
- A contact is **Complete/Pending** if it has been marked complete but has not been accepted by the Administrator.
- A contact is **Overdue** if it has not been marked complete and the current date is after the contact due date. Overdue numbers are marked in red.

## Assigning Connections


With appropriate rights, you can create new outreach connections, which you can assign to either an individual or an outreach team.

Creating and assigning outreach connections creates a change request. An administrator must approve this request inside ACS People Suite and upload the records to Access ACS.

1. Locate the individual for whom you want to create an outreach connection.
2. On the Individual Information page, click the **Connections** tab.
3. At the top of the page, click **New Connection**.
4. Select **Outreach Connection** and click **Next**.
5. To assign a connection to an individual:
  - Select **Assign Individual**.
  - In the **Last Name** and **First Name** fields, enter the name of the individual to whom you want to assign the connection and click **Run Search**.
  - Click the name of the individual to whom you want to assign the connection.
6. To assign a connection to an outreach team:
  - Select **Assign Team**.
  - In the **Select a Team** drop-down menu, select the outreach team to which you want to assign the connection.
7. Enter information about the connection in the available fields.
8. Click **Next**. The summary of the connection displays.
9. Once you review the connection summary, click **Submit**.

## Outreach Details

The Outreach Details page lets you can view a list of all contact information for each contact on a single page. You can change the date range, include completed connections, sort the leader list, and print a report.

1. Click **Directories > Connections**.
2. Click on the **Outreach** tab.
3. To change the date range, enter new dates in the **From** and **To** fields. To select the dates from a calendar, click , select the dates, then click **Go**.
4. To include completed connections, select **Include completed connections**, then click **Go**.
5. To sort the page, click a column heading.
6. To print the outreach details, click **Print**.

# Work with Small Group Connections

Small Groups Connections are designed to connect individuals with small groups.

The Small Group Connection Summary page displays all outstanding assigned connections for the leaders in your organization. The list includes the leader's name, the names of the groups they are leader of, and the number of outstanding connections. You must have the appropriate rights to access this page.

To view a detailed list of all outstanding assigned connections, click **Connection Details**.


## Assigning Connections

Administrators and staff with appropriate rights can assign connections to small group leaders. When you assign a connection to a leader, Access ACS sends a notification e-mail.

1. Locate the individual you want to assign to a small group leader.
2. On the Individual Information page, click **Connections**.
3. At the top of the page, click **New Connection**.
4. Select **Small Groups Connection** and click **Next**. A list of available small groups displays.
5. Select the small groups you want to create a connection and click **Next**.
6. If necessary, enter additional comments in the **Remarks** field.
7. Click **Next**. The connection summary displays.
8. After you review the connection summary, click **Submit**.

## Viewing Outreach Details

You can also view small group connection details.

1. Click **Directories > Connections**.
2. Click on the **Small Groups** tab.
3. To change the date range, enter new dates in the **From** and **To** fields. To select the dates from a calendar, click , select the dates, then click **Go**.
4. To include completed connections, select **Include completed connections**, then click **Go**.
5. To sort the page, click a column heading.
6. To print the outreach details, click **Print**.

# Print a Directory of Outreach Contact Assignments

You can view and print the Directory of Outreach Contact Assignments, which is a comprehensive list of all assignments made for a particular date range. The list displays:

- The leaders assigned to make contacts
- The total number by individual
- Whether the contact was made or not made
- Whether there are overdue contacts

You can use this list to make sure that your staff and leaders are accountable for following up with their contacts.

### To view the directory of outreach contact assignments

1. Point to **Directories**, then click **Connections**.
2. Click an individual's name to view a list of contacts assigned to that individual. This list includes the contact type (description), due date, and status.
3. To view detail information, including responses and comments, click **View More**.
4. When the information displays, click **Print** to print the outreach activity.

## View and Print Directories

You can view and print family and individual directories with or without pictures.

Individual directories display the individual's last name, first name/goes by name, address, primary e-mail address, and phone number.

Family directories display the family last name, head and spouse names, address, primary e-mail address, phone number, and the first names of any children in the family.

If an individual has a suffix (Jr., III, IV) or a nickname, those display as well.

Only individuals and families who opt to display information in directories display. If an individual or family has set certain information not to display or has not entered certain information, the corresponding area is blank.

#### To view or print a family directory

1. Point to **Directories**, then click **Directories**.
2. Click **View a Family Directory** or **View a Family Directory with Pictures**.
3. On the preview page, click **Print**.

#### To view or print an individual directory

1. Point to **Directories**, then click **Directories**.
2. Click **View an Individual Directory** or **View an Individual Directory with Pictures**.
3. On the preview page, click **Print**.

## View Web Links

Access ACS creates Web links for signing in, creating a login, event registration, online giving, small groups, serving, and text messaging.

To give your members easy access to these features, promote the URLs in a visible place on your website. You can also generate a QR code that you can print in your church's bulletin for online giving.

With the Registration and Small Groups URLs, your website visitors can browse available events and small groups without signing in. To register for an event or request information about a small group, members and attendees must sign in.

Access ACS also creates individual Web links for events that you create with the Events Setup feature and for your organization calendars.

#### To view web links

1. Point to **Admin**, then click **Options**.
2. Click the **Web Links** tab.

## Calendar Web Links

Calendar web links let you generate links to display calendars on your church's website. You can select multiple calendars to display events from and enter a custom display name. For example, you can select the Bible Study and Missions calendars and enter Outreach Events at Wesley UMC for a custom display name.

You can also view links to calendars you've generated in the past. You can update the display name, which updates the display on your church's website, or delete previous links. Deleted web links will no longer function on your website.

1. Point to **Admin**, then click **Options**.
2. Click **Web Links**.
3. On the Web Links page, click the **Calendar** tab.
4. Under **Calendar(s)**, click **Select Calendars**.
5. Select which calendars to include, then click **OK**. You can also choose to include public events from all calendars.
6. In the Display Name field, enter the name you want to display at the top of your calendar.
7. Click **Generate**.

## Online Giving Web Links

If you use ACS Pay Plus, you can create a link or QR code to let people give online without logging in. You can place the link on your church's website or social media, and you can print the QR code in bulletins or display it on monitors.

To create an all-purpose link for online giving, leave the fund and amounts blank, then click **Generate**. Or, you can select a fund if you want the web link to direct people to give to a specific fund, such as a Habitat for Humanity fundraiser.

To create your link, click **Generate**. If you update your fund and amount, you must regenerate a new link and QR code.

To learn more about QR codes and how they can help your ministry, watch our Mobile Minutes video.

#### To set up online giving web links

1. Point to **Admin**, then click **Options**.
2. Click **Web Links**.
3. On the Web Links page, click the **Online Giving** tab.
4. If you want your web link gifts to benefit a specific fund, select a **Fund**. Otherwise, choose **No Fund Selected**.
5. If you want to specify the amount of the gift, enter an **Amount**. This is helpful if you want to encourage parishioners to give a specific amount, such as \$10 to an earthquake relief fund.
6. Click **Generate**. The link to the page displays as well as a QR code.

# Member Login

Adding a member login page or area to your church's website lets members easily sign into Access ACS.

You can customize this link to display text that best fits your organization's needs. For example, the link can read "Access your member information here." or "Click here to update your member information."

If you've uploaded a record with the member's name and e-mail address to Access ACS, the member can enter that information and request an account. After this happens, the member receives an e-mail to set a password and log in.

## To add a member login URL to your website

1. Point to **Admin**, then click **Options**.
2. Click the **Web Links** tab.
3. Under **Member Sign In Link**, copy the URL listed.

# Create a Login

You can add a web link for to create a login in Access ACS. This link lets users create a guest user account when their name and e-mail do not match records in Access ACS.

## To add a create a login URL to your website

1. Point to **Admin**, then click **Options**.
2. Click the **Web Links** tab.
3. Under **Create a Login**, copy the URL listed.

# Set up Global Preferences

Before you upload your ACS People records or begin working in Access ACS, you must set up your global preferences. You must select global preferences for the following Access ACS features:

## Calendar Preferences

In this section, select your Access ACS calendar option. If you do not want to use a calendar, you can disable all Access ACS calendars. If you choose to use a calendar, Access ACS provides these calendar options:

- Access ACS built-in calendar
- ACS Facility Scheduler calendars

## Event Registration Preferences

Under Event Registration Preferences, you can select the information you will require from individuals when they register for events.

By default, guest registrations require a contact's name and e-mail, but you can require contacts to enter their address and phone number as well.

You can also enter a message to display on event registration receipts. This message displays unless you change the message for individual events.

To save any changes you make to Event Registration Preferences, click **Save**.

## Assign Administrator E-mail

You must enter an administrator e-mail address. When users report problems, join classes or activities, request changes to pledges, and add individuals or families to the database, Access ACS sends notification e-mails to the e-mail address that you enter.

## Online Directory and Member Search Preferences

Under Online Directory and Member Search Preferences, you can select:

- the Member Status(es) of the records that display the
- default Online Directory privacy features the fields that
- display, besides **Name**, in the Online Directory the Member
- Status(es) that can print the Online Directory.

Members and Lay Leaders are the only individuals affected by the selections you make here. To learn more, see Online Directory Fields and Online Directory Preferences.

You can also include a customized message in the foot of the online directory. For example, you can add a message that your church directory may not be used for solicitation. The message is limited to 255 characters, and the number of characters that displays updates as you enter your message.

## Church Life

When members log into Access ACS, **Go Mobile**  links to the Church Life mobile app.

To clear this link, clear **Display a link to the Church Life mobile app on the Member login page**.

## Assign the Administrator E-mail Address

Before you begin working in Access ACS, you must set up the administrator e-mail address.

When members and attendees report problems, join classes or activities, enter pledges, and add individuals or families to the database, Access ACS sends notification e-mails to the administrator e-mail address.

In this area, enter the e-mail address that you want to receive the e-mails.

1. Point to **Admin**, then click **Options**. The Global Preferences page displays.
2. In the **Assign Administrator E-mail** section, enter the general administrator's e-mail address.
3. Select the **General** option, then click **Add**. The e-mail address displays in the grid.
4. Repeat step 2 for each general administrator e-mail address you want to add.
5. Click **Update**.

Pledge administrators should have full security rights to **Personal Pledges** and **Other Member Pledges**.

To learn more about customizing security permissions, see Customizing an Individual User's Profile.

## Online Directory and Member Search Preferences Options

On the Global Preferences tab, you can select to display all the Member Statuses or only display certain Member Statuses on records.

You can also select the default Online Directory preferences. Individuals with appropriate rights (members and lay leaders) can view online directories that include individuals or families in your database.

In this section, you can set the default preferences for your organization's family directories.

### To select your default search and directory preferences

1. Point to **Admin**, then click **Options**.
2. Make sure the **Global Preferences** tab is selected.
3. In the **Online Directory and Member Search Preferences** area, select to either display all the Member Statuses or only display certain Member Statuses.
4. Select one of the following options:
  - To include all users in online directories, select **Include all users in the online directory**.
  - To exclude all users from online directories, select **Exclude all users in the online directory**.
5. Select the fields that you want to include in online directories. The available options, in addition to the default of **Name**, are:
  - Street address
  - Phone number
  - E-mail address
6. Select to let all Member Status(es) print the Online Directory or only let certain Member Status(es) print.
7. Select to include a customized message in the directory footer. For example, you can enter a message that states the directory may not be used for solicitation.
8. Click **Save**.

### Useful Information

Once you select the default directory fields for your organization, users can customize their personal settings on the My Personal Preferences page. Users can choose to exclude fields that you included. They cannot include fields that you exclude.

For example, you choose to include phone numbers and e-mail addresses in online directories. When users customize their personal preferences, they can choose to exclude their e-mail addresses or phone numbers from online directories. However, they cannot choose to include street address.

# Select Online Directory Fields

Administrators can select the fields that display in online directories. On the Global Preferences page, you can select from the following fields:

- **Street address**
- **Phone number**
- **E-mail address**

Once you select the default directory fields for your organization, members and attendees can customize their personal settings on the My Personal Preferences page. They can choose to exclude fields that you included, but cannot include fields that you exclude.

For example, you choose to include phone numbers and e-mail addresses in online directories. When members customize their personal preferences, they can choose to exclude their e-mail addresses or phone numbers from online directories. However, they cannot choose to include street addresses.

## To select online directory fields

1. Point to **Admin**, then click **Options**.
2. Make sure the **Global Preferences** tab is selected.
3. Under **Select Displayed Directory Fields**, select the fields that you want to include in online directories.
4. Click **Save**.

# Select Online Directory Preferences

Members, group leaders, and attendees with appropriate rights can view online directories that include individuals or families in your Access ACS database.

You can set the default preferences for your organization's family directories, but the options you select do not apply to individual directories.

Once you select the default preferences for your organization, members and attendees can customize their personal preferences on the My Personal Preferences page. For example, you decide to exclude all Access ACS users from the online directory. However, the Anderson family customizes their personal settings to include themselves in online directories. When users view online directories, information for the Anderson family displays.

You can also select the contact information that displays in online directories. For more information, see [Selecting Online Directory Fields](#).

## To select your default online directory preferences

1. Point to **Admin**, then click **Options**.
2. Make sure the **Global Preferences** tab is selected.
3. In the **Default Online Directory Preferences** area, select one of the following options:
  - To include all users in online directories, select **Include all users in the online directory**.
  - To exclude all users from online directories, select **Exclude all users in the online directory**.
4. Click **Save**.

# Manage and Send E-mail Notifications

In Access ACS, members and attendees can view and print their tax statements and view their outreach assignments. You can notify your members when their tax statements are available and when their outreach assignments are updated.

Before you can send notification e-mails, an administrator with appropriate rights must upload tax statements and connection information from ACS to Access ACS.

## Statement Notification

Members and attendees can view and print their ACS Plain Paper tax contributions statements through Access ACS.

Before members and attendees can access the statements, an administrator must upload them from ACS to Access ACS. To upload tax statements, you must have ACS version 11.0 or higher.

When tax statements are available, you can select to automatically send users an e-mail once the upload is complete. You can customize the default subject line and e-mail message.

### To send statement notification e-mails

1. Point to **Admin**, then click **E-mail Notifications**.
2. Click **Statement Notification**, then click **Next**.
3. Enter the **Friendly Name**; the sender's e-mail address.
4. If necessary, edit the e-mail subject and the message.
5. To automatically send statement notification e-mails after you upload tax statements, select **Send E-mail automatically after Statements are uploaded**.
6. To save your custom message and e-mail preferences, click **Save**.
7. To send the e-mail, click **Save and Send**.

## Outreach Notification

Members and attendees can view their outreach assignments in Access ACS.

### Uploading Connections

Before outreach assignments are available, an administrator with appropriate rights must upload connections from ACS to Access ACS.

1. Point to **Admin**, then click **Upload Records**.
2. Enter your ACS Desktop **user name** and **password** and click **Login**.
3. In the ACS for Windows Export window, select **Include Connections**.
4. Click **Upload**.

### Sending Notifications

After you upload connections information, you can send a notification e-mail to members who have updated outreach assignments. You can change the default subject line and e-mail message.

To automatically send outreach notification after you upload connections, select **Enable Outreach Connection Notification**. If you do not select this, your e-mail will not be sent.

1. Point to **Admin**, then click **E-mail Notifications**.
2. Click **Connection Notification**.
3. Edit the **Subject**, if necessary.
4. Enter a message in the **Message** text box, if necessary.
5. To automatically send the e-mail for new connections due within 7 days, select **Enable Outreach Connection Notification**. If you do not select this, Access ACS will not send the e-mail.
6. To save your custom message and e-mail preferences, click **Save**.



# Small Group Attendance Notification

Use the Small Group Attendance Notification option to create and enable small group attendance marking notification e-mails.

Access ACS sends these e-mails to small group leaders after their meetings have occurred as a reminder to mark their attendance in the program. You must select **Enable Attendance Notification** for the e-mail to be sent.

Form fields are helpful if you have a large number of small group leaders to send attendance notification e-mails to and want to insert each small group into each e-mail. You could also use it to create a link that lets a small group leader sign in and go directly to his or her attendance marking page. **To send small group attendance notifications**

1. Point to **Admin**, then click **E-mail Notifications**.
2. Click **Small Group Attendance Notification**.
3. The administrator's e-mail address displays in the **Reply To** field. If you prefer that responses are sent to a different e-mail address, you can enter it.
4. In the **Friendly Name** field, enter the name you want to display for Sender in the recipients e-mail client.
5. By default, "Small Group Attendance Markings" displays in the **Subject** field. You can edit this to meet your organization's preferences.
6. To search for and insert individual information in the e-mail, use the **Form Field** drop-down list options to search for and insert this information.
  - **Small Group Leader's Name** — To insert the small group leader's name in the e-mail when it is generated, select this option.
  - **Small Group's Name** — To insert the small group name in the e-mail when it is generated, select this option.
  - **Attendance Marking Link** — To insert a hyperlink to the Sign In page, select this option. After the small group leader signs in, the link directs the leader to the appropriate small group attendance marking page.
7. If applicable, customize the e-mail message. You can also use the message entered.
8. Use the E-mail Toolbar to format your notification e-mail to your organization's specifications. You can customize font type and size, formatting, alignment, and colors.
9. To spell check your message, click **Check Spelling**.
10. To send the mark attendance notification e-mail to the small group leader when the meeting occurs, select **Enable Attendance Notification**.
11. To save your changes, click **Save**.

# Small Groups Connection Notification

The Small Group Connection Notification option lets you customize small group connection notification e-mails.

These e-mails are automatically sent to small group leaders when someone requests information about the small group.

## To send small group connections notifications

1. Point to **Admin**, then click **E-mail Notifications**.
2. Click **Small Group Connections Notification**.
3. The administrator's e-mail address displays in the **Reply To** field. If you prefer that responses are sent to a different e-mail address, you can enter it.
4. In the **Friendly Name** field, enter the name you want to display for Sender in the recipients e-mail client.
5. By default, "Small Group Connection" displays in the **Subject** field. You can edit this to meet your organization's preferences.
6. To include individual information in the e-mail, use the **Form Field** drop-down list options to search for and insert this information.
  - **Small Group Leader's Name** — Inserts the small group leader's name in the generated e-mail.
  - **Small Group's Name** — Inserts the small group name in the generated e-mail.
  - **Requester's Name** — Inserts the name of the individual interested in the small group in the generated e-mail.
  - **Requester's Phone Number** — Inserts the phone number of the individual interested in the small group in the generated e-mail.
  - **Requester's E-mail Address** — Inserts the e-mail address of the individual interested in the small group in the generated e-mail.
  - **Requester's Message** — Inserts the individual's message in the generated e-mail.
  - **Requester's Availability** — Inserts the individual's availability in the generated e-mail.
  - **Site Name** — Inserts the name of the site in the generated e-mail.
  - **Complete Connection Link** — Inserts a link to the connection page so the small group leader can handle the connection.
7. If applicable, customize the e-mail message. You can also use the message entered.
8. Use the **E-mail Toolbar** to format your notification e-mail to your organization's specifications. You can customize font type and size, formatting, alignment, and colors.
9. To spell check your message, click **Check Spelling**.
10. To send the e-mail, click **Save**. The e-mail is automatically sent when someone requests information about the small group.

# Account Login Invitation

The Account Login Invitation e-mail lets you invite individuals who registered for an event or contributed to create an Access ACS account.

This e-mail is sent automatically, but you can edit the template to meet your organization's needs.

## To send account login invitations

1. Point to **Admin**, then click **E-mail Notifications**.
2. Click **Login Account Invitation**.
3. The administrator's e-mail address displays in the **Reply To** field. If you prefer that responses are sent to a different e-mail address, you can enter it.
4. In the **Friendly Name** field, enter the name you want to display for Sender in the recipients e-mail client.

5. By default, "An Invitation from Site Name" displays in the **Subject** field. You can edit this to meet your organization's preferences.
6. To include individual information in the e-mail, use the **Form Field** drop-down list options to search for and insert this information. You can insert the recipient's name, your site name, your site phone number, or create a login link.
7. If applicable, customize the e-mail message.
8. Use the E-mail Toolbar to format your notification e-mail to your organization's specifications. You can customize font type and size, formatting, alignment, and colors.
9. To save the e-mail, click **Save**.

# Add New Features

To view the Add New Features page, point to **Admin**, then click **Add New Features**.

## ACS Pay Plus

ACS Pay Plus lets members and guests give and pay for event registrations online.

Administrators can:

- Set up recurring or one-time contributions
- Accept ACH, all major credit cards, and debit cards
- Create an unlimited number of funds
- Enable mobile giving for contributors
- Easily import online gifts to post in your ACS database

# ACS and ChurchCast Integration

## Overview

ChurchCast is an add-on service for voice, e-mail, and text messages.

Integrating ACS with ChurchCast streamlines the member data transfer process. Churches can designate whose information to transfer to ChurchCast from ACS. Churches can also select which information displays in ChurchCast and which groups display. After integration, the data is maintained on a daily basis.

To integrate with ChurchCast, your church must sign up for Access ACS.

If you prefer to use Church Cast without integration through the Access ACS APIs, download and complete the Data Template to use ChurchCast for texting and emailing.

## Requesting API Access and Security IDs

First, read the information about Getting Started to request access to the Access ACS APIs.

Once you receive access to the APIs, ACS will send your church a SecID, which allows ChurchCast to access information from ACS. You'll send your church's Site ID and SecID to ChurchCast.

## Completing the Integration

When the integration is complete, you can use ChurchCast's interface to select which member statuses, groups and types of contacts display.

**ACS Setup**

[Print Current Setup](#)

**Member Status Restrictions:**  
Select the Member Statuses you wish to include when importing. Leave this list empty to include all Member Statuses.

Add Member Status		
Member Status	Edit	Delete
FBC Employee	<a href="#">Edit</a>	<a href="#">Delete</a>
Family Of Mem.	<a href="#">Edit</a>	<a href="#">Delete</a>
Financial	<a href="#">Edit</a>	<a href="#">Delete</a>
In Other Org.	<a href="#">Edit</a>	<a href="#">Delete</a>
Mem. FBC/Not Sr.	<a href="#">Edit</a>	<a href="#">Delete</a>
Member FBC/Sr.	<a href="#">Edit</a>	<a href="#">Delete</a>
Member SS	<a href="#">Edit</a>	<a href="#">Delete</a>
Nonresident Member	<a href="#">Edit</a>	<a href="#">Delete</a>
Prospect	<a href="#">Edit</a>	<a href="#">Delete</a>
Special Events	<a href="#">Edit</a>	<a href="#">Delete</a>

**Group Setup:**  
Select the ACS Group Categories you wish to include as groups when importing. Leave this list empty to skip group creation.

Add Group Category		
Category (Master Group)	Edit	Delete
Committee Members (Activities)	<a href="#">Edit</a>	<a href="#">Delete</a>
Deacon-Serving (Activities)	<a href="#">Edit</a>	<a href="#">Delete</a>
Music (Activities)	<a href="#">Edit</a>	<a href="#">Delete</a>
FBC Staff (Activities)	<a href="#">Edit</a>	<a href="#">Delete</a>
Discipleship Training Council (Activities)	<a href="#">Edit</a>	<a href="#">Delete</a>
Sunday School Leaders & Dir (Activities)	<a href="#">Edit</a>	<a href="#">Delete</a>

**Phone Setup:**  
Select the ACS Phone Types as indicated below.

**Home Phone:**

Add Phone Type		
Phone Type	Edit	Delete
Home	<a href="#">Edit</a>	<a href="#">Delete</a>
Individual's Home	<a href="#">Edit</a>	<a href="#">Delete</a>
Alternate	<a href="#">Edit</a>	<a href="#">Delete</a>
Alt Home	<a href="#">Edit</a>	<a href="#">Delete</a>
Indiv.	<a href="#">Edit</a>	<a href="#">Delete</a>

**Cell Phone:**

Add Phone Type		
Phone Type	Edit	Delete
Cell	<a href="#">Edit</a>	<a href="#">Delete</a>
Mobile	<a href="#">Edit</a>	<a href="#">Delete</a>

**Work Phone:**

Add Phone Type		
Phone Type	Edit	Delete
Work	<a href="#">Edit</a>	<a href="#">Delete</a>
Business	<a href="#">Edit</a>	<a href="#">Delete</a>

**Email Address Setup:**  
Select the ACS Email Address Types as indicated below.

Home Email Address:

Work Email Address:

# Access ACS Launch Tips

If your organization is new to Access ACS, here are some ways to get your members and attendees on board.

## Update activities, classes, and groups

Before launching, make sure your activities, classes, and small groups are up to date. For example, if you're no longer using a roster, be sure to drop everyone from it. If a small group hasn't met in several years, you can delete it. Otherwise, people may log into Access ACS for the first time and find they are in groups they've forgotten about.

## Check permissions

Also, make sure all user profile permissions are set correctly. Don't lock down too many features from your members. Otherwise, it may appear that firsttime users can't do much with Access ACS, which makes them less likely to use it.

## Get e-mail addresses

If your church owns the ACS Attendance module, you can modify the attendance marking sheet to include columns for home and business email addresses.

Ask Sunday School teachers or class secretaries to help obtain email addresses from those who do not have one on file or whose email address may have changed. Each week, as the marking sheets are turned in, the person responsible for entering attendance can include email addresses that have been added or modified. Use these columns on the marking sheet for the entire period.

It's a good practice to modify the marking sheets once a quarter for members to make sure that the church has valid email addresses. Different Access ACS features interest different groups within your congregation. Be sure each group knows how Access ACS features can help them stay connected.

**Staff and Small Group Leadership** – First, make sure your staff and leadership team are on board. They may not have had access to their members' information before, so Access ACS and Church Life could be incredible to them. Access ACS lets them mark attendance, manage rosters, email or text group members, complete outreach follow ups, update information on group members, and schedule and recruit volunteers.

Be sure the group leaders understand the need for Access ACS and aren't just going along for the ride. Your group leaders will be the cheerleaders for Access ACS, both for their small group members as well as the rest of the congregation.

It's a good idea to have a training session for your staff and leadership, since they will pass their Access ACS knowledge on to their small group members. You could also create a checklist of tasks for them to do when they first log into Access ACS. Staff and leadership team members should understand how to update personal information, send an email to the group, complete a connection, and mark attendance.

**Active Members** – You'll need to actively market Access ACS to your members so they understand why they should be on board and use it.

The tasks active members complete in Access ACS are a bit different than leaders. Active members will register for events, obtain tax statements, find available small groups, and give electronically.

Event Registration and Online Giving should be set up well before your launch. When members log in for the first time and see they can register for events or give, they will be more likely to engage with Access ACS.

To get people in your church to start using Access ACS, create an Access ACS launch team.

Each launch point in Access ACS can benefit from a launch team to make that launch a success. Launch team members can demonstrate how to sign in and use Access ACS at committee meetings, small group meetings, or other types of activities.

The launch team can get involved with the church, and church's members and attendees can learn how to go online and use Access ACS. To give your members easy access to Access ACS, create a member sign in page on your church's website. The Web Links in the Admin area contain a link your members can use to sign in.

## To access your member sign in link

1. Point to **Admin**, then click **Options**.
2. Click the **Web Links** tab.
3. On the **General** tab, under **Member Sign In Link**, copy the URL. You can place this URL on your website or email it to members.

At the end of the year, upload your contribution tax statements online.

Create an instructional document (with screenshots) that explains exactly how they sign up and log in to get to the tax statement. You can email this document to your members or place a few around the church so members and attendees can pick up the instructions. Bulletin inserts are an effective way to gather e-mail addresses and help update address and phone information.

Use a bulletin insert during your Access ACS launch period. Recommend that members complete a form and place it in the offering plate during the service. Ushers can quickly gather the forms and submit them to the church office.

Using inserts for the entire promotion period should reach about 75-80% of your membership. If you also use ACS Connections, you can track and send prayer requests.

Open the ACS Connections module and click **Define Lists**. Add an outward contact type called Prayer Request. You can also set up prayer teams and assign the appropriate people to each team. Make sure you remember to upload to Access ACS so that information displays on the Access ACS pages.

As you receive prayer requests, you can enter them into Access ACS so that the prayer teams can see who they should pray for.

## To enter prayer requests in Access ACS

1. Sign in to Access ACS and find the record of the person requesting the prayer.
2. At the top of the record, click **Connections**.
3. At the top of the Connections page, click **Assign New Connection**.
4. Select **Outreach Connection** and click **Next**.
5. On the Assign Outreach Connection page, choose the person or prayer team responsible for completing this prayer request and click **Next**.
6. Select and enter appropriate information. Make sure you select **Prayer Request** in the **Description** drop-down list. Click **Next**.
7. Review your selections and click **Submit**.
8. On the **Admin** tab, click **Change Requests**.
9. To upload your prayer request, select the outreach connection you created and click **Apply Change Request**.

Launching Access ACS is not a one-time event. You'll need to continuously maintain Access ACS to give leaders and members reasons to keep using the tool.

Add new events to sign up for, new groups, use connections, and make sure your group leaders mark attendance in Access ACS.

# Text Messaging Opt-In API

We have created an API you can insert into your Web site code that lets members enter their phone number, select a carrier, then submit for an invitation to join your texting program. This page contains the HTML code and JavaScript you need to insert.

You have two options when it comes to inserting this functionality into your site.

1. You can copy and paste the JavaScript to your site from the Web Links page in Access ACS.
2. You can copy and paste HTML code into your site. Note

The simplest way to utilize this feature is to use the JavaScript method. If you want to customize the code before you use it, use the HTML method.

The details of how to perform both of these procedures are outlined below.

## Inserting the JavaScript

Go to **Admin>Options>Web Links**. At the bottom of the page, copy the Text Messaging Opt-in Script and place it in the <body> of your HTML page.

## Inserting the HTML Code

Copy and paste the following code into the HTML for your site:

```
<!DOCTYPE html>
<html>
<head>
  <title>Opt-In Example</title>
  <style>
    #lblphone, #phonenumber, #providerlist { margin-right: 10px; }
    .popupcontainer { position: fixed; width: 100%; top: 0px; left: 0px; z-index: 2000; }
    .backdrop { background-color: #ccc; filter: alpha(opacity=70); opacity: 0.7; position: fixed; z-
index: 1080; top: 0px; left: 0px; width: 100%; height: 100%; }
    .verticalposition { position: fixed; top: 35%; left: 0px; width: 100%; z-index: 1090; }
    .popupwindow { margin-left: auto; margin-right: auto; width: 280px; padding: 10px; background:
white; border: 1px solid black; border-radius: 10px; -moz-border-radius: 10px; -webkit-border-radius: 10px; box-
shadow: black 5px 5px 5px; -moz-box-shadow: black 5px 5px 5px; -webkit-box-shadow: black 5px 5px 5px; }
    .popupbuttons { text-align: center; margin-top: 5px; }
  </style>
  <script src="https://ajax.googleapis.com/ajax/libs/jquery/1.7.1/jquery.min.js" type="text/javascript"><
/script>
  <script type="text/javascript">
    $(document).ready($.ajax({
      url: "http://secure.accessacs.com/access/wsinterface/phoneauth.ashx?req=plist", //url
to get providers
      dataType: 'jsonp',
      success: function (result) {
        $.each(result, function (j, prov) {
          var myoption = $("<option value='" + prov.ProviderID + "'>" + prov.
ProviderName + "</option>");
          myoption.appendTo("#providerlist");
        });
      }
    }));

    function ProcessOptIn() {
      var MobilePhone = {
        PhoneNumber: $("#phonenumber").first().val(),
        ProviderID: ($('#providerlist option:selected').first().val()),
        MySiteNumber: ""//enter your site number here
      };
      $.ajax({
        url: "http://secure.accessacs.com/access/wsinterface/phoneauth.ashx?req=optin",
//url to process optin
        dataType: 'jsonp',
        data: MobilePhone, //data from screen
        success: function (result) {
          $('#output').empty();
          $.each(result, function (i, v) {
            $('#output').append(v);
          });
        }
      });
    }
  </script>
</body>
</html>
```

```

        });
    }
}
</script>
</head>
<body>
    <label id="lblphone" for='phonenumber'>
        Phone Number:</label>
    <input id='phonenumber' type='text' />
    <select id='providerlist'>
        <option value='-1'>select a provider</option>
    </select>
    <input id='btnSendInvite' type='button' value='Send Invite' onclick='ProcessOptIn()' />
    <div id='divoutput' class="popupcontainer" style='display: none;'>
        <div class='backdrop'>
        </div>
        <div class="verticalposition">
            <div class='popupwindow'>
                <span id='output'></span>
                <div class='popupbuttons'>
                    <input id='btnphonepopupok' type='button' onclick='popupnoshow()'
value='OK' /></div>
                </div>
            </div>
        </div>
    </div>
</div>

```



# Access ACS Resources

## Getting Started

Two important resources for Access ACS administrators are the Getting Started Guide, which contains an outline to help you set up Access ACS for your organization, and the list of Access ACS Launch Tips .

You can customize Access ACS' look and feel to match the style of your website. You can upload your organization's logo and set the default colors. You can also customize the background, menu bar, title bar, grids, hyperlink, and button colors.

To learn more, see [Work with Access ACS Themes](#).

Here are some promotional materials to introduce your members and attendees to Access ACS.

The newsletter inserts, pastor letter, flyer template, e-mail address reply card, and PowerPoint presentation are Microsoft® Word© documents that you can customize to meet your organization's needs.

- **Newsletter Inserts** – Customize and insert this text into your weekly newsletters or bulletins to get the message out about the new benefits of membership at your church.
  - **Sample Pastor Letter** – Customize and mail this letter from your pastor before your launch. It explains the benefits of Access ACS and the importance of providing email addresses.
  - **Flyer Template** – Customize this flyer to get the message out about Access ACS throughout your launch.
  - **Poster** – Display this poster to get the message out about online event registration during your launch. Be sure to keep some Email Reply Cards close by.
  - **PowerPoint Presentation** – You can show a PowerPoint presentation during your services and worship times to get the message out about small groups, events, contributions, and volunteering.
- Email Address Reply Card** – Customize and use this reply card to gather email addresses. Place the cards near posters and flyers, and make them available during services and at the church office.

This Member Login Guide is designed to help your members log in to Access ACS.

You can customize the guide with your church's information, and the file has been set up in high resolution to produce high-quality results from your printer or an outside vendor.

You can print and display these above the computers at your church, send a copy out with promotional flyers, or email a copy to all of your members when they sign up.

## Small Groups

To learn more about setting up small groups, see [Small Group Setup](#).

Here are some promotional materials for small groups.

You can customize the flyer template, e-mail address reply card, and PowerPoint presentation to meet your organization's needs.

- **Flyer Template** – Customize and display this flyer to get the message out about Small Groups throughout your launch.
- **Small Groups Poster** – Use this poster to get the message out about small groups. Display it prominently throughout your church and keep some Email Reply Cards close by.
- **Small Groups PowerPoint Presentation** – Customize and present this PowerPoint Presentation during your services and or small group meetings to help members and leaders learn about the features in Access ACS.
- **Small Groups Web Banner** – Insert this Small Groups Web Banner on your Web site to promote small groups before and during your launch.
- **Email Address Reply Card** – Customize this Reply Card to gather email addresses. Place these cards in prominent locations in your church.

Here are some tips for launching small groups. If you'd like a one-on-one consultation, email our Implementation Specialists, or call them at 800.736.7425.

### Planning

1. Form a team to plan the various steps necessary to start your small group ministry. Select a leader for small groups and get people with a vision for small group success involved.
2. Pick a date to launch your small groups. Avoid dates that clash with other important times such as Christmas or Vacation Bible School. Start promoting your small groups about a month before your launch date.

### Promoting

1. Customize and use the small groups marketing materials to promote your groups. Make sure the poster, flyer, and reply cards are in prominent places around your church. If members and attendees haven't submitted or updated their information, make it is easy for them to do so.
2. Promote small groups on your Web site. Display the Web banner and link it to a form to collect email addresses or suggestions for small groups.
3. Keep reminding your church throughout the month before you launch. Run the small groups PowerPoint® Presentation at church events and include reminders in your newsletters.

### After the Launch

1. Mail or email the Member Login details to everyone who signed up, and keep reply cards available.
2. Make sure all new members are educated on the benefits of Access ACS and are comfortable using it.

3. Keep promoting small groups. Run the PowerPoint presentations regularly, insert information into newsletters, and post testimonials from small group members on your Web site.

## Events

To learn about setting up events, see [Set up and Work with Events](#).

Here are some promotional materials for event registration.

You can customize the flyer template, pastor letter, e-mail address reply card, and PowerPoint presentation to meet your organization's needs.

- **Flyer Template** – Customize and display this flyer to get the message out about Event Registration.
- **Event Registration Poster** – Use this poster to get the message out about Event Registration. Display it prominently throughout your church and keep some Email Reply Cards close by.
- **Event Registration PowerPoint® Presentation** – Customize and show this presentation during your services and worship times to get the message out about the new ways your church can register and pay for events.
- **Event Registration Web Banner** – Include this banner on your Web site to promote event registration during your launch.
- **Email Address Reply Card** – Customize this Reply Card to gather email addresses. Place these cards in prominent locations in your church.

Here are some suggestions for launching event registration.

For one-on-one guidance and advice, contact our Implementation Specialists at [implement@acstechnologies.com](mailto:implement@acstechnologies.com), or call 800.736.7425.

### Planning

1. Create a team in charge of planning, promoting, and launching event registration. This team can be made up of members, leaders, and staff members who have a vision for how events could help your church.
2. Pick a date to launch. Avoid clashes with busy times of year, and use the month before to promote event registration and encourage members to sign up.
3. Consider promoting events alongside volunteering, since volunteers are always needed for events. When members sign-up for volunteering, they give information on their skills, gifts, and qualifications, and knowing this information can influence the types of events you hold.

### Promoting

1. Review our events marketing materials. Make sure it's easy for everyone to get their email addresses to you. If you already have your members email addresses, make sure some reply cards are still available, as they can also be used to update information.
2. Make sure your members and attendees know your leadership stands behind Event Registration. Have your pastor address this before your launch.
3. Promote events on your Web site. You can display the Web banner on your site and link it to a form to collect email addresses or questions about skills and talents.
4. Keep reminding your church throughout the month before you launch. Run the events PowerPoint® Presentation and include reminders in your newsletters. **After the Launch**
  1. Mail or email the Member Login details to everyone who signed up, and keep reply cards available for newcomers.
  2. Make sure all new members are educated on the benefits of event registration and are comfortable using it.
  3. Continue promoting event registration. You could post testimonials from event volunteers and the event leadership team on your Web site, as well as include a list of some of the events coming up and the ways members can help.

## Serving

To learn more about setting up serving and volunteers, see [Set up and Work with Serving Opportunities and Manage Volunteers](#).

Here are some promotional materials for volunteering. You can download and customize these documents to meet your organization's needs.

- **Volunteering Flyer Template** – Use this flyer to get the message out about Volunteering before and during your launch.
- **Volunteer Poster** – Use this poster to get the message out about volunteering before and during your launch. Display it prominently throughout your church, and keep some Email Reply Cards close by.
- **Volunteering PowerPoint Presentation** – Throughout your launch, customize and present this PowerPoint presentation to get the message out about volunteering.
- **Volunteering Web Banner** – Insert this Volunteering Web Banner on your Web site. You can rotate it regularly with the other banners for event registration, online giving, and small groups.
- **Your Email Address Reply Card** – Customize this Reply Card to gather email addresses. Place these cards in prominent locations in your church.

Here are suggestions for launching your volunteer program.

For one-on-one guidance, contact our Implementation Specialists at [implement@acstechnologies.com](mailto:implement@acstechnologies.com), or give them a call at 800.736.7425.

### Planning

1. Create a team in charge of planning, promoting, and launching your volunteer program. This team can include members, leaders, and staff who have a vision for how volunteering could help your church.
2. Host a leadership class to assess church members' talents, skills, and passions. They may not be aware that the skills they have. Let people know about the opportunities available to them through volunteering.

3. If you have small groups, use them to get the message out about volunteering. Encourage small groups to volunteer together and to explore what each member has to offer.
4. Pick a date to launch your volunteer ministry. Try to avoid clashes with other events, and use the month before to promote volunteering and member sign up.

### Promoting

1. Review our volunteering marketing materials. Make sure that the poster, flyer, and reply cards are in prominent places in your church. Even if you already have your members' email addresses, make sure reply cards are still available so members can update information.
2. Promote volunteering on your Web site. You can display this Web banner on your site and link it to a form to collect email addresses or questions about skills and talents.
3. Remind your church throughout the month before you launch. Run the volunteering PowerPoint® Presentation at services and include reminders in your newsletters.

### After the Launch

1. Mail or email Member Login details to everyone who signed up, but keep reply cards available for those who missed out or need to update their information.
2. Make sure all new members are educated on the benefits of Access ACS and are comfortable using it.
3. Keep promoting volunteering. Post testimonials from volunteers and volunteer leaders on your Web site, and also include a list of some of the positions available and how to join.
4. When you have upcoming events, promote volunteering. Show the two PowerPoint presentations for volunteering and events side by side, place the flyers near each other, and use the banners on your Web site.
5. Screen all of your volunteers. Make sure that they have all of the proper training and qualifications that they need for their position, and run background checks on any volunteers who will be working with children.
6. Train your volunteers effectively in the church and its vision, the value of volunteering, the role of volunteering in their own growth as individuals, and the significance of their own volunteer role

## Online Giving

To learn more about online giving, see the Online Giving New User Checklist and Setting up Online Giving.

Here are some promotional materials for online giving. You can download and customize these documents to meet your organization's needs.

- **Contributions Flyer Template** – Use this flyer to promote online giving.
- **Online Giving Poster** – Use this poster to get the message out about contributing online. Be sure to keep some Email Reply Cards close by.
- **Contributions PowerPoint® Presentation**– To get the message out about online giving options, customize and present this Contributions PowerPoint® Presentation during your services.
- **Online Giving Web Banner** – Include this Web Banner on your Web site to promote online giving during your launch.
- **Email Address Reply Card** – Customize and use this Reply Card to gather everyone's email addresses.