



## ACS People Suite – Contributions



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# Searches

With Searches, you can locate specific records to use in reports, communications, and extracts.

You can search for people or organizations with specific criteria in common, or you can edit your search results to handpick a list of individuals for mailing labels or a mass email.

## **i** Permissions

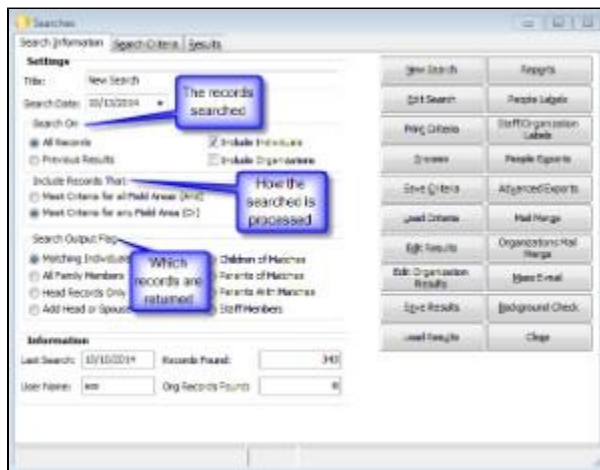
Search criteria and results are limited to records the user has been granted access to

# Getting Started with Searches

The Searches window has three tabs: Search Information, Search Criteria, and Results.

## Search Information

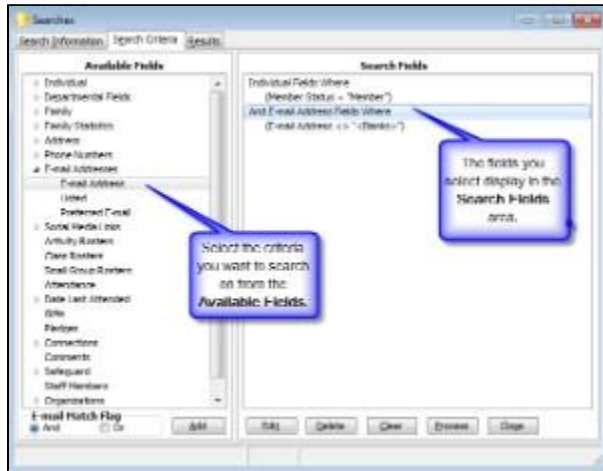
The Search Information tab is the starting point for conducting a search. The settings you select determine which records are searched, how the search is processed, and which records are returned. For example, you can select to search through all records, or only through those in your last search results. You can select to return all matching records, or to find the children of those who match your search criteria.



After processing a search, you can select several options to work with your results, including Mail Merge and Advanced Exports. You can also edit the results from this tab to handpick a list of individuals who have no search criteria in common that you need for an item such as mailing labels.

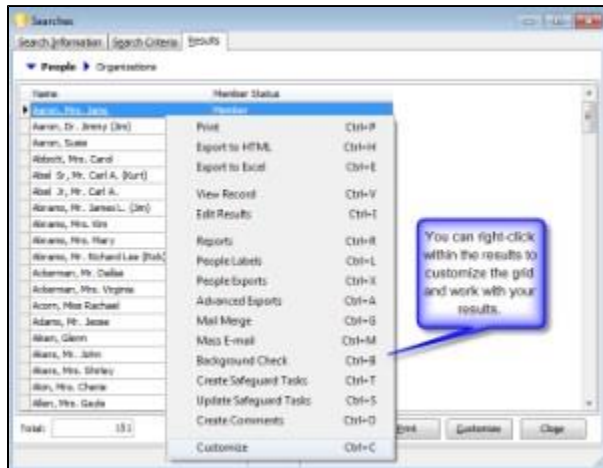
## Search Criteria

On the Search Criteria tab, you'll select the specific items you want to search on, for example, records with a certain member status, people with June birthdays, or people that have an email address.



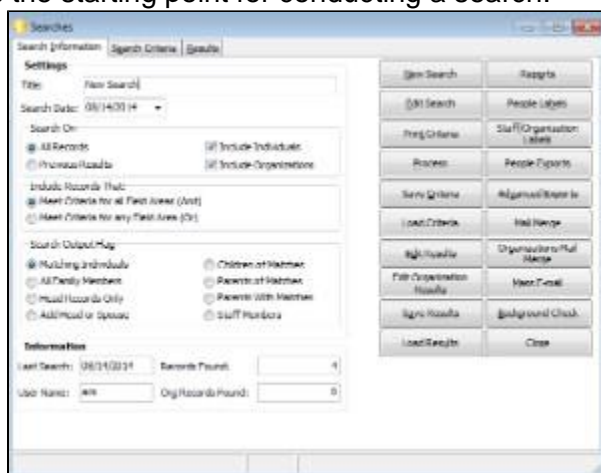
## Results

On the Results tab, you can view the records found, customize the grid, and select several other options to work with your results including exporting them to Excel®.



# The Search Information Tab

The Search Information tab is the starting point for conducting a search.



## Settings

The options you select under Settings determine which records are searched, how the search is processed, and which records are returned.

### Search Date

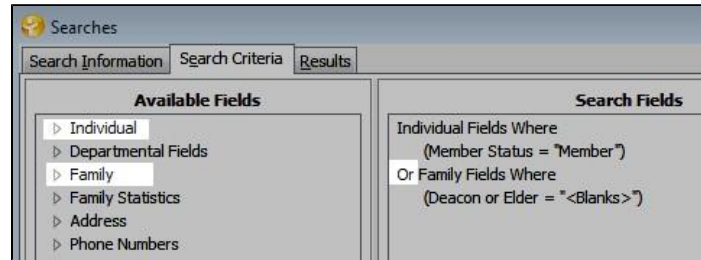
The Search Date defaults to the current date, but you can change it if it affects your search. For example, you might want to search on those who will be in a certain age range by a certain date.

## Search On

You can select to search on all records or only on your previous results. If you own the Organizations module, you also have the options to Include Individuals and Include Organizations. Select the appropriate check boxes based on the records you need.

## Include Records That

In this section, you will select "And" or "Or." This is used in situations where you have search criteria that span more than one field area. For example, if you are searching on an individual field and a family field. You will select "And" when you want the records found to meet *all* of the criteria selected. You will select "Or" when you want the records found to meet *any* of the criteria selected.



## Search Output Flag

Select the records you want to return in your search:

- **Matching Individuals** — Select to return those who match your search criteria.
- **All Family Members** — Select to return those who match your search criteria and those in their household.
- **Head Records Only** — Use this option to search for a group of individuals but only return the head record from that family. In these cases, the head record may not actually meet the search criteria, but someone in their household does.
- **Add Head or Spouse** — Returns the records that meet your criteria, and for head and spouse records returned in your results, their corresponding spouse and head records are also returned. Suppose you are searching for those with January birthdays. If a child is the only one in a family with a January birthday, that child will be the only member of the family in the search results. However, if a head record has a January birthday, that person along with their spouse will be included in the search results.
- **Children of Matches** — Returns the children of those who match the criteria you selected.
- **Parents of Matches** — Returns the parents of those who match the criteria you selected.
- **Parents With Matches** — Returns the children who match your criteria along with their parents.
- **Staff Members** — This is used with Organization search criteria and returns those listed as staff who meet your criteria.

## Other Options

There are two columns of buttons on the Search Information tab. The buttons in the left pane apply to creating, saving, and working with searches. The buttons in the right pane are options to work with the results from your searches, such as creating labels, mail merges, advanced exports, and sending mass emails.

## New Search, Edit Search, and Process

Click New Search to clear the search fields area on the Search Criteria tab and start a new search. Click Edit Search to edit the existing search fields on the Search Criteria tab and click Process to process the search.

## Printing, Saving, and Loading Criteria

These options apply to the search fields chosen on the Search Criteria tab. The print option gives you a list of your selections on both the Search Information and Search Criteria tabs. The save option saves the criteria you selected, and the load option loads saved search criteria.

## Saving, Editing, and Loading Results

These options apply to the search results; the records returned when you processed the search. Click Save Results to save the actual results from your search (the individuals or organizations). Click Edit Results or Edit Organization Results to add or remove individuals or organizations from the search results. Click Load Results to load saved results.

### Editing Search Results


The Edit Results option is useful when working with your search results. For example, you may need to create mailing labels for the group of individuals who signed up to volunteer during Vacation Bible School. In this case, you need to handpick the individuals who will be on your mailing labels. With Edit Results, you can select only those you want to create labels for.

## Working with Your Search Results

You can export and work with your search results using the options in the right pane:

- Reports
- Labels
- People Exports
- Advanced Exports
- Mail Merge
- Mass E-mail
- Background Check

## The Search Criteria Tab

After you select your settings on the Search Information tab, you can select your search criteria. The Search Criteria tab provides you with many different types of fields to search on, and you can search using any combination of the available fields. You can expand the sections that have an arrow  beside them to display more options.



## Available Search Criteria

### Note

By default, only active records are searched.

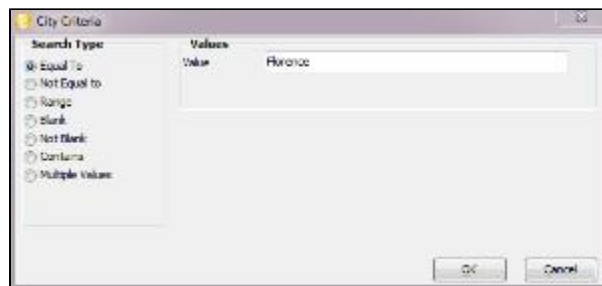
1. Once you have made your selections on the **Search Information** tab, click the **Search Criteria** tab.
2. Expand **Lists**, then double-click **Active**.
3. Select "**A**" and "**D**". Click **OK**.
4. Continue adding your search criteria, then click **Process**.

Use the Search Criteria tab to select your search fields and process your search. You can save the criteria and use it later.

## Fields Criteria

Fields criteria are available under various sections depending on what you have set up in Define Lists. Fields criteria are text fields such as Goes by Name and City.

When you add a field to your search, a box displays with the name of the selected field as its title, such as "City Criteria."



### Social Security Numbers

If you do not have rights in [People Add/Edit Users](#), you cannot search using Social Security Number.

## Search Type

Select the Search Type you want to use. The Search Type selected determines the options available under Values.

Select Contains if you want to search for records that contain the text you enter in the Value field. Suppose you want to search for people who live on Main Street. You can add Address Line 1 criteria from the Address Fields, Select Contains, and enter "Main Street" in the Value field. The search will return all records with a Main Street address.

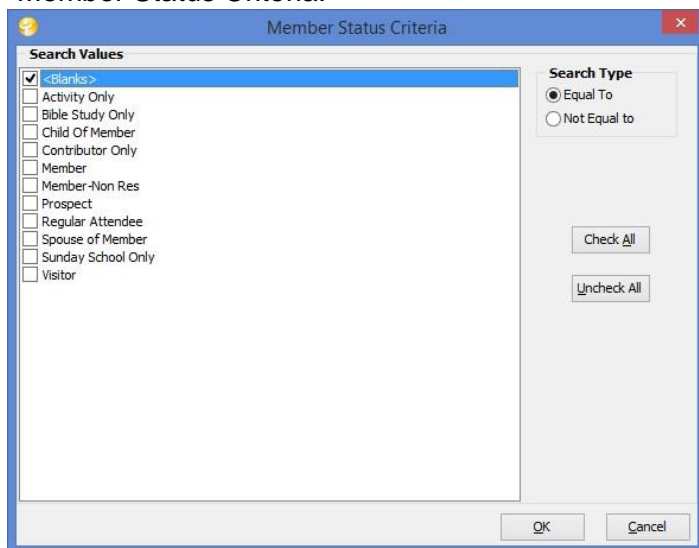
Select Multiple Values if you want to search for records that match one of two or more values you enter.

When you select this option, enter a value in the Enter Value field and click Add . Repeat this process to add more values.

## Lists Criteria

Lists criteria are available under certain categories, such as Individual and Address, depending on what you have set up in Define Lists. Some examples of Lists criteria include contributor record type, family position, marital status, pictures, and member status.

When you add a list to your search, a box displays with the name of the selected list as its title, such as "Member Status Criteria."



You can select the check box beside each item you want to include in your search. By default, Equal To is selected, but you can also select Not Equal To to find records that do not equal your selection.



### Tip

You can select <Blanks> to search for individuals who have nothing selected for a particular list on their record. This is helpful when you want to find out who is missing information on their record, for example, who has no member status.

## Dates Criteria

You can search for dates such as Date Joined or Date of Birth - Month. When you add a date field, a box displays with the name of the selected field as its title, such as "Date of Birth - Month Criteria".

Under each Date field, you can select four subfields for searching. These subfields are Month, Day, Year, and Age. You can search for an exact date by selecting the main date field, such as Date Joined.

However, if you want to search for those with birthdays in November, you can select Date of Birth - Month, listed under the Date of Birth field.



### Date Subfields

If you select a subfield for a date (Month, Day, Year, or Age), enter a numeric value to search on rather than selecting a date. For example, if you want to search for all members who are 50 years old, you would select Date of Birth - Age > Equal To and enter "50" in the Value field.

### Fuzzy Value

Select this option when you want to search on a general time frame such as this month or last year. This option is available under certain search types when selecting the main date field.

#### Tip

The Prompt for Values option is helpful when you are saving your search criteria. When you process saved criteria, it will prompt you to enter in the correct date each time.

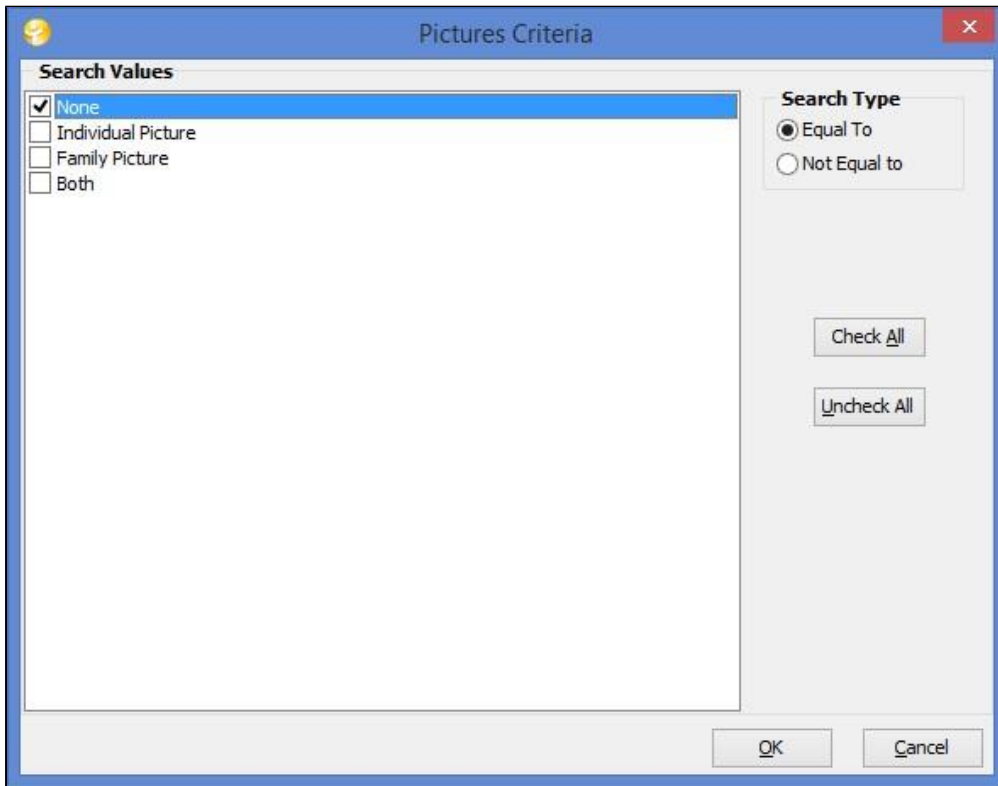
### Pictures Criteria

You can search for records containing individual pictures, family pictures, or both. You can also search for records that have no pictures.

**Note**

If you search for records with individual pictures, the search results will include any of those records that also contain family pictures.

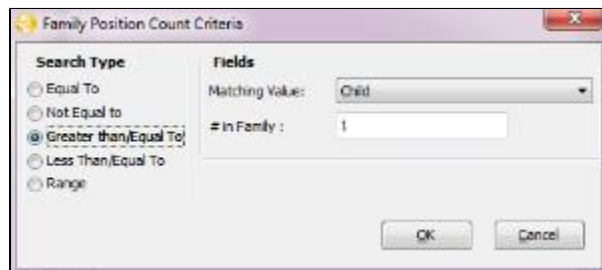
Just the same, if you search for records with family pictures, the search results will include any of those records that also contain individual pictures.



Select the search values and search type you want to use, and then click **OK**.

### Family Statistics Criteria

You can search on Family Statistics to find information such as how many families have at least one child.



When you add Family Statistics criteria to your search, a box displays with the name of the selected criteria as its title, such as "Family Position Count Criteria."

You will select the Search Type you want to use then enter the corresponding fields. For example, suppose you are processing a search to find out how many families have at least one child. In this scenario, you would select a Search Type of Greater than/Equal To. Under Fields, you would select Child for the Matching Value, and you would enter "1" for # in Family.

## Phone Number and E-mail Address Criteria

Use Phone Numbers or E-mail Address criteria to select phone numbers or e-mail addresses to search on.



## Search Type

Select the Search Type you want to use for the phone number or email address.

### Tip

Select Contains to return records with a phone number/email address that contains the text you enter in the Value field. For example, you can search for people who have an 843 area code. You can double-click Phone Number, select Contains, then enter 843 as the Value.

## Search Values

The option you select under Search Type determines what options display under Search Values. You can select a Phone Type or E-mail Type but this is not required.

## Social Media Links Criteria

Use Social Media Links to not only search for a specific address, but to search for those who do and do not have certain social media links on their records.

## Search Type

Select the Search Type you want to use. The Search Type selected determines the options available under Search Values.

Select Blank to return records with no social media addresses, or no social media address for the Link Type selected. Select Not Blank to return records with a social media address, or a social media address for the Link Type selected. For example, you can search for everyone who has a Facebook link on their record. Select Contains to return records with a social media address that contains the text you enter in the Value field.

## Search Values

The option you select under Search Type determines what displays under Search Values. You can select a Link Type but this is not required.

## Activity Rosters Criteria

When you select Activity Rosters as search criteria, a New Roster Criteria window displays where you can select activity groups to search on. You can also search for specifics such as date added and date dropped.

**Master Group** — Select the Master Group you want to search on from the list. The master group's categories display in the area beneath the Locate field. Master Groups are limited to those that the user has been granted access to in Add/Edit Users.

**Locate** — Enter the name of the group or the quick code for the group you want to search on. The group you enter is highlighted in the list of groups. Quick codes for groups are set up in Activities Setup.

**All Levels** — Select to search all group levels. This collapses the list of group categories for the master group.

**Show Deactivated** — Select to display deactivated groups along with active groups.

**All Activities** — Select to search for all individuals who are included on a roster in Activities. This searches through all activity participants across all activity master groups.

**Equal To** — Select if you want the search to return records matching the Activity Rosters Criteria.

**Not Equal To** — Select if you want the search to return records that do not match the Activity Rosters Criteria.

**In Roster** — Select to return all records on an activity roster as of the Search Date selected on the Search Information tab.

## General Fields

This area displays the Element lists for the selected activity group. Elements are set up in Activities Setup. Depending upon setup, between one and four elements will display, and they may have different titles. You can select items from any of these lists, but this is not required.

## Activation Dates

**Date Added** — Select if you want to search for Activity Roster records that were added on a certain date or date range. Select the date(s) to filter by.

**Date Last Changed** — Select if you want to search for Activity Roster records that were modified on a certain date or date range. Select the date(s) to filter by.

**Date Dropped** — Select if you want to search for roster records that were removed from the roster on a certain date or date range. Select the date(s) to filter by.

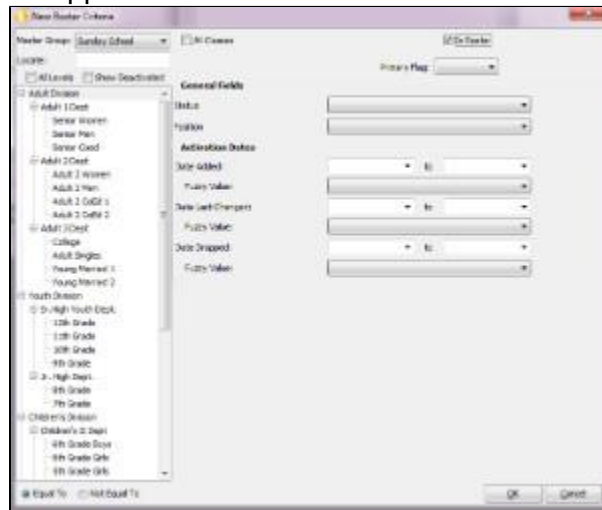
**Fuzzy Dates** — If you don't have specific dates in mind, select a fuzzy value, such as last month or last quarter.

## Additional Fields

This area displays if you have additional fields set up for the master group. These fields are set up on the Roster Fields tab in Groups Setup. You can enter values to search for in these fields.

## Class Rosters Criteria

You can search for those in your Attendance classes, as well as for more specific criteria such as class position, date added, and date dropped.



**Master Group** — Select the Master Group you want to search on from the list. The classes display in the area beneath the Locate field. Master Groups are limited to those that the user has been granted access to in Add/Edit Users.

**Locate** — Enter the name of the group or the quick code for the group you want to search on. The group you enter is highlighted in the list of groups. Quick codes for groups are set up in Attendance Setup.

**All Levels** — Select to search all group levels. This collapses the list of classes for the master group.

**Show Deactivated** — Select to display deactivated groups along with active groups.

**All Classes** — Select to search for all individuals who are included on a roster in Attendance groups. This searches through all participants across all Attendance master groups.

**Equal To** — Select if you want the search to return records matching the Class Rosters criteria.

**Not Equal To** — Select if you want the search to return records that do not match the Class Rosters criteria. For example, if you want to search for everyone who is not enrolled in the College and Career Sunday School class.

**In Roster** — Select to return all records on a class roster as of the Search Date selected on the Search Information tab.

## General Fields

This area displays the Status and Position drop-down lists for the selected Attendance Master Group.



## Activation Dates

**Date Added** — Select if you want to search for Class Roster records that were added on a particular date or date range. Select the date(s) to filter by.

**Date Last Changed** — Select if you want to search for Class Roster records that were modified on a certain date or date range. Select the date(s) to filter by.

**Date Dropped** — Select if you want to search for roster records that were removed from the roster on a certain date or date range. Select the date(s) to filter by.

**Fuzzy Dates** — If you don't have specific dates in mind, select a fuzzy value, such as last month or last quarter.

## Small Group Rosters Criteria

You can search for those in your Access ACS Small Groups. You can also search for more specific criteria such as date added and dropped.



**Master Group** — Select the Master Group you want to search on from the list. The groups associated with it display in the area beneath the Locate field. Master Groups are limited to those that the user has been granted access to in Add/Edit Users.

**Locate** — Enter the name of the group you want to search on. The group you enter is highlighted in the list of groups.

**All Levels** — Select to search all group levels. This collapses the list of small groups associated with the master group.

**Show Deactivated** — Select to display deactivated groups along with active groups.

**All Small Groups** — Select to search for all individuals who are in a small group. This searches through all participants across all master groups (for small groups).

**Equal To** — Select if you want the search to return records matching the Small Group Rosters criteria.

**Not Equal To** — Select if you want the search to return records that do not match the Small Group Rosters criteria. For example, if you want to search for everyone who is not in the Thursday Night Small Group.

**In Roster** — Select to return all records on a small group roster as of the Search Date selected on the Search Information tab.

## General Fields

This area displays the Position drop-down list for the selected Master Group.

## Activation Dates

**Date Added** — Select if you want to search for Small Group records that were added on a specified date or date range. Select the date(s) to filter by.

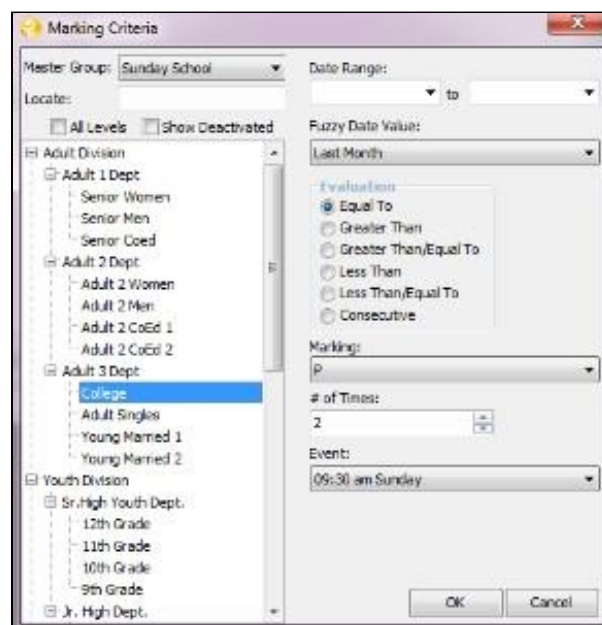
**Date Last Changed** — Select if you want to search for Small Group records that were modified on a specified date or date range. Select the date(s) to filter by.

**Date Dropped** — Select if you want to search for roster records that were removed from the roster on a specified date or date range. Select the date(s) to filter by.

**Fuzzy Dates** — If you don't have specific dates in mind, select a fuzzy value, such as last month or last quarter.

## Attendance Criteria

You can search on Attendance markings for a particular master group or across all groups. You can select a date range, a number of times present or absent, and you can show consecutive absences or times present.



**Master Group** — Select the Master Group you want to search on from the list. The classes or activity categories display in the area beneath the Locate field. Master Groups are limited to those that the user has been granted access to in Add/Edit Users. You can also select All Groups to search for attendance markings across all master groups.

**Locate** — Enter the name of the group or the quick code for the group you want to search on. The group you enter is highlighted in the list of groups. Quick codes for groups are set up in Attendance Setup.

**All Levels** — Select to search all group levels. This collapses the list of classes or activity categories for the master group.

**Show Deactivated** — Select to display deactivated groups along with active groups.

**Date Range** — If you want to search through a specific date range, enter or select the dates here.

**Fuzzy Date Value** — Use to select a time frame such as Last Month or This Year.

**Evaluation** — Select an item based on how you want to search. For example, if you want to search for those who have been absent more than once during the month, select Greater Than/Equal To, under Marking select A, and under Number of Times select 1. You can also search for those who have been present or absent for a consecutive amount of times.

**Marking** — Select the type of marking you want to search for:

- **P** - Present
- **A** - Absent
- **C** - Communion

**Number of Times** — Select or enter the number of times present, absent, or communion you are searching for. For example, you might want to search for individuals who were present 2 times this month.

**Event** — If you want to search for attendance markings during a specific Attendance event, select the event time here. Date Last Attended Criteria

Use the Date Last Attended window to select criteria that returns individuals who last attended the selected activity, class, or small group:

- On a selected Date (Date Last Attended - Date)
- During a selected Month (Date Last Attended - Month)
- On a selected Day of the month (Date Last Attended - Day)
- During a selected Year (Date Last Attended - Year)
- A specified number of years ago (Date Last Attended - Age)

## **Date Last Attended**

**Locate** — Enter the name of the group or the quick code for the group you want to search for. The group you enter is highlighted in the list of groups. Quick codes for groups are set up in Attendance Setup.

## Group to Evaluate

**Evaluate Master DLA** — Select if you want the search to return individuals based on the Date Last Attended (DLA) in the selected *master* group. If you do not select this option, the search returns records based on the *roster* Date Last Attended.

## Evaluation

**Range** — Select to search for a date last attended within a date range. Select the start and end dates you want to use for the search.

**Value** — The Value field is available if you select Equal To or Not Equal for the Evaluation type. The value you enter depends on the type of Date Last Attended Criteria you are searching on:

- For **Date Last Attended - Date** criteria, enter the date you want to search on, such as 8/31/2014.
- For **Date Last Attended - Month** criteria, enter the numeric value of the month you want to search on. For example, if you want to search for individuals who last attended in February, enter "2."
- For **Date Last Attended - Day** criteria, enter the numeric value of the day you want to search on. For example, if you want to search for individuals who last attended on the 14th of any month, enter "14." Valid values for Date Last Attended - Day are integers between 1 and 31.
- For **Date Last Attended - Year** criteria, enter the four-digit year you want to search on. For example, if you want to search for individuals who last attended in the year 2013, enter "2013."
- For **Date Last Attended - Age** criteria, enter the number of years ago you want to search on. For example, if you want to search for individuals who last attended 2 years ago, enter "2."

## Gifts and Pledges Criteria

You can search on Gifts criteria such as those that have gifts or don't have gifts during a certain time frame, and those who have given to certain funds. You can also search on Pledge criteria such as those who have zero amount pledges and those who have not pledged this year.

## Gifts

**Search Type** — Select the Search Type you want to use. The item you select here determines the options that display under Gift Values.

**Posting Period** — Select a specific date range or a Fuzzy Date, such as this month or last year.

**Gift Values** — Depending on the Search Type you selected, enter the value(s) you want to search for. If you select Has Gifts or Has no Gifts, you will not enter a gift value.

**Filter Values** — You can select additional items to filter on such as Fund, Transaction Type, Payment Type, and Memorial / In Honor. These items are all optional.

## Pledges

**Search Type** — Select the Search Type you want to use. The item you select determines the options that display under Pledge Values. If you select Has Pledge or Has no Pledges, you will not enter a pledge value.

**Pledge Start/Stop** — Enter a specific date range or a Fuzzy Value such as This Year.

**Pledge Values** — Enter the values you want to search on based on the Search Type you selected.

**Filter Values** — If you want to filter on additional items, such as Fund or Status, select them here.

### Connections Criteria

When searching on Connections criteria, you can search on the main Connections field or one of the subfields underneath, such as Type or Response.

### Connections

**Search Type** — Select Equal To or Not Equal To, depending on the type of search you want to process.

**Contact Flags** — Select the Contact Flags from each category that you want to search for.

**Additional Options** — You can select additional items to further filter your search, such as Date range, Connection Type, Response, and Comment.

### Sub-fields

You can search on the sub-fields for Connections, such as Type and Response.

**Search Values** — Select the item(s) from the list that you want to search on.

**Search Type** — Select Equal To or Not Equal To. For example, if you are searching on Type criteria, you may want to search on Equal To First Contact to find everyone with this contact type on their record.

## Comments Criteria

You can search for Comments on individual and family records. You can search for specific comments, comments that contain certain words, and to see which records contain certain Comment Types.

The screenshot shows the 'Comments Criteria' dialog box. It is divided into several sections: 'Search Type' with radio buttons for 'Begins with', 'Contains', 'Does Not Begin with', 'Does Not Contain', 'Blank', and 'Not Blank' (selected); 'Comment Flags' with radio buttons for 'Family Comments', 'Individual Comments', and 'Both' (selected); 'Comment Fields' with a 'Date Range' dropdown set to 'To', a 'Fuzzy Date' dropdown, and a 'Comment' text field; 'Select Comment Types' with a list of comment types including 'Crisis Date', 'Emergency', 'Employer or Business', 'Family Comment', 'Medical Alert', 'Org-Comment', 'Pastor Notes', 'Profile Update', and 'Special Gifts' (checked); and 'Include all Types' checkbox. There are also 'Check All', 'Uncheck All', 'OK', and 'Cancel' buttons.

**Search Type** — Select the Search Type you want to use. For example, you can select Contains to search for comments that contain a certain word or phrase.

**Select Comment Types** — Select the Comment Types you want to include in your search. If you want to search through all Comment Types, select the Include all Types check box.

**Comment Flags** — Select to search family comments, individual comments, or both.

**Comment Fields** — You can select a Date Range, a Fuzzy Date (such as last quarter), and you can enter text in the Comment field that you want to search for.

## Safeguard Criteria

When you search using Safeguard criteria, you can search on the main Safeguard criteria, or the sub-fields which are Task Description and Task Status.

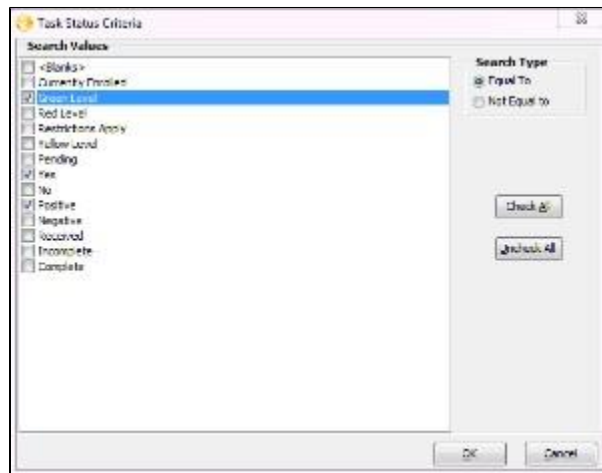
The screenshot shows the 'Safeguard Criteria' dialog box. It is divided into two main sections: 'Search Type' with radio buttons for 'Equal To' (selected) and 'Not Equal To'; and 'Safeguard Fields' with dropdown menus for 'Description' (set to 'Background Check'), 'Status' (set to 'Pending'), 'Date Completed' (set to 'To'), and 'Fuzzy Date'. There is also a 'Comment' text field. At the bottom, there are 'OK' and 'Cancel' buttons.

## Safeguard Criteria

**Search Type** — Select Equal To or Not Equal to depending on what you are searching for.

**Safeguard Fields** — Select the items you want to search on: Description, Status, Date Completed (range), Fuzzy Date (such as last month), and Comment.

## Task Description and Task Status

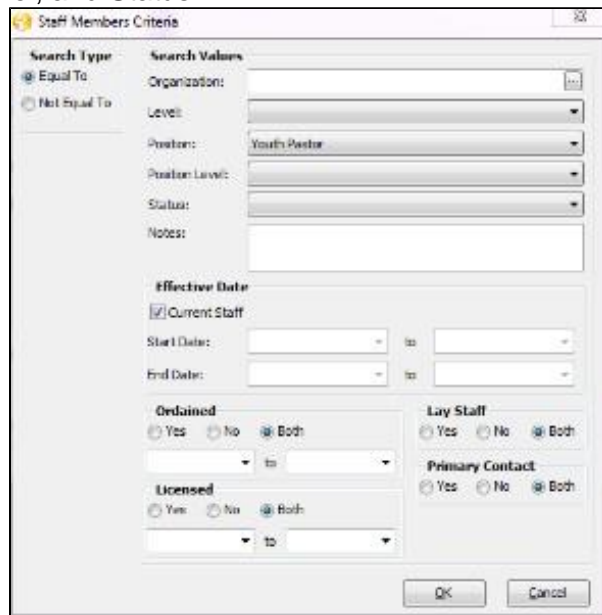


**Search Values** — Select the item(s) from the list that you want to search for.

**Search Type** — Select Equal To or Not Equal To depending on what you are searching for.

## Staff Members Criteria

If you own the Organizations module, you can search on Staff Members criteria. You can search for items such as Position, Position Level, and Status.



**Search Type** — Select Equal To or Not Equal To depending on what you are searching for.

**Search Values** — Select the items you want to search on, such as Organization, Level, and Position. You can also enter text in the Notes field if you want to search for staff with a certain note on their record.

**Effective Date** — Under the Effective Date section, select the Current Staff check box if you want your search to include only those who are currently staff members. Clear this option to select a date range of time that the staff was serving at an organization.

**Additional Options** — You can search for staff who are ordained and/or licensed, and whether they are lay staff or a primary contact.

## Organizations Criteria

You can select from a variety of dates, fields, and lists when you search on Organizations.

## Organizations Fields Criteria

Use Organizations Fields criteria to search on items such as Notes and PIN number, and other fields you have set up in Define Lists.

When you add an Organization Field to your search criteria, the Fields Criteria box displays the name of the selected field as its title, such as "PIN Criteria."



## Search Type

Select the Search Type you want to use.

Select Contains if you want to search for records that contain the text you enter in the Value field. For example, if you want to search for all organizations associated with a church named "Transfiguration", you can add the Name criteria, select Contains, and enter "Transfiguration" in the Value field. You can also search on fields that are blank or not blank to find which records have certain information and which ones do not. For example, you can search for organizations that have a blank PIN number.



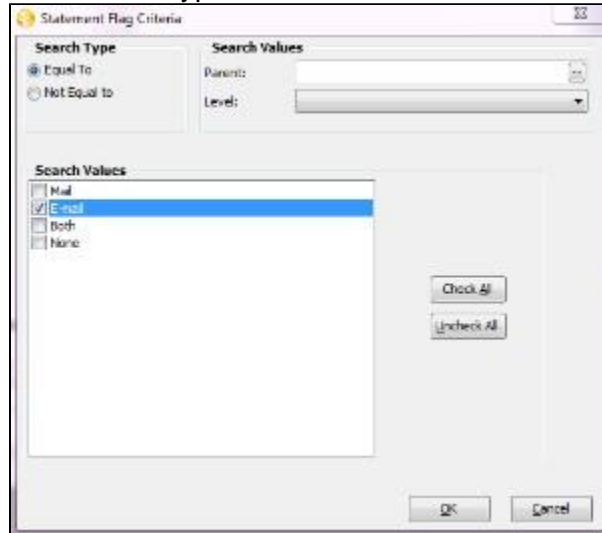
## Search Values

The Search Type you select determines the fields available under Search Values. You can search for records under a certain Parent organization and/or Organization Level.

## Organizations Lists Criteria

Use Organizations Lists criteria to search for items such as Statement Flag, Newsletter Flag, and other list items you have set up in Define Lists.

When you add an Organization List to your search criteria, the Lists Criteria box displays the name of the selected field as its title, such as "Church Type."



**Search Type** — Select Equal To or Not Equal To depending on what you want to search for.

**Search Values** — There are two sections of Search Values; one has check boxes and the other has the Parent and Organization Level options. Select the items you want to include in your search.

## Organizations Dates Criteria

You can search for organizations-related Dates criteria. These dates include the ones you set up in Define Lists as well as Connections dates if you own that module.

When you add an Organizations Date to your search criteria, a box displays with the name of the selected field as its title, such as "Date of Inception Criteria."

Under each Date field listed, there are four sub-fields you can select for searching. These sub-fields are Month, Day, Year, and Age. You can search for an exact date by selecting the main date field, such as Date Joined. However, if you want to search for all organizations that were started in November, you can select Date of Inception - Month, listed under the Date of Inception field.

### **Date Sub-fields**

If you select a sub-field for a date (Month, Day, Year, or Age), you must enter a numeric value rather than selecting a date. For example, if you are searching for Date of Inception - Month, and you are looking for those with a November date, you would enter "11."

## Fuzzy Value

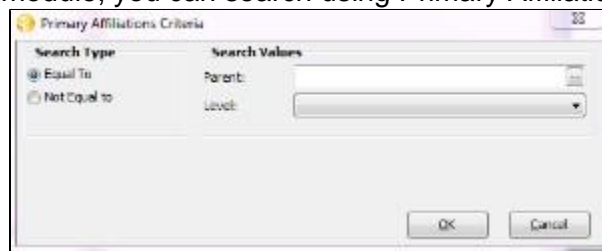
Select this option when you do not want to search on an exact date, such as Last Month or This Year.

### **Tip**

The Prompt for Values option is helpful when you are saving your search criteria. When you process saved criteria, it will prompt you to enter in the correct date each time.

## Primary Affiliations Criteria


If you own the Organizations module, you can search using Primary Affiliations criteria.



**Search Type** — Select Equal To or Not Equal To depending on what you are searching for.

**Search Values** — You can select the options you want to search on from the Parent and/or Level values.

## Selecting, Editing, Deleting, and Clearing Search Criteria

The Search Criteria tab displays a list of fields available for Searches. You can expand the sections that have an arrow  beside them to display more search criteria.

1. Select your **Search Settings** on the **Search Information** tab.
2. Click **New Search**. This opens the **Search Criteria** tab.
3. On the **Available Fields** list, select a field for your search and click **Add**, or double-click the field.  
For more information on specific search criteria, see Available Search Criteria.
4. Select the criteria for the selected search field and click **OK**.
5. Repeat steps 3-4 for each field you want to include in your search. Your search criteria displays on the **Search Fields** list.



#### Note

When selecting more than one item, don't forget to check the **Match Flag** at the bottom of the Searches window and the **Include Records That** option on the **Search Information** tab.

1. On the **Search Criteria** tab, in the **Search Fields** list, select the search criteria you want to edit.
  2. Click **Edit**. The relevant search criteria window displays.
  3. Edit the criteria then click **OK**.
- 
1. On the **Search Criteria** tab, click **Clear**.
  2. When the confirmation message displays, click **Yes**.
- 
1. On the **Search Information** tab, click **Load Criteria**.
  2. On the **Search Criteria** tab, in the **Search Fields** list, select the search criteria you want to delete.
  3. Click **Delete**, then **Yes**.

## Conducting a Search

There are three main steps in the search process:

- Select the search settings on the [Search Information tab](#)
- Enter [search criteria](#) and process the [search results](#)
- Select the search results output (reports, labels, mail merge, e-mail, background checks, and so on)



### Including Deactivated Records

By default, only active records are searched.

1. Once you have made your selections on the **Search Information** tab, click **New Search**. This opens the **Search Criteria** tab.
  2. Expand **Lists**, then double-click **Active**.
  3. Select "**A**" and "**D**". Click **OK**.
  4. Continue adding your search criteria, then click **Process**.
- 
1. On the **Search Information** tab, under **Search On**, select the records you want to search on.
  2. Under **Include Records That**, select "and" or "or" depending on your search criteria.
  3. Under **Search Output Flag**, select the type of records you want returned in your search results.
  4. Enter search criteria by doing one of the following:
    - Click **New Search**, to enter new search criteria.
    - Click **Edit Search**, to edit existing search criteria.
    - Click **Load Criteria**, to use previously saved search criteria.
  5. Once you enter your criteria on the **Search Criteria** tab, click **Process**.
  6. Click the **Results** tab to view the search results. Select any of the available outputs by right-clicking within the **Results** grid or selecting one of the options from the **Search Information** tab.



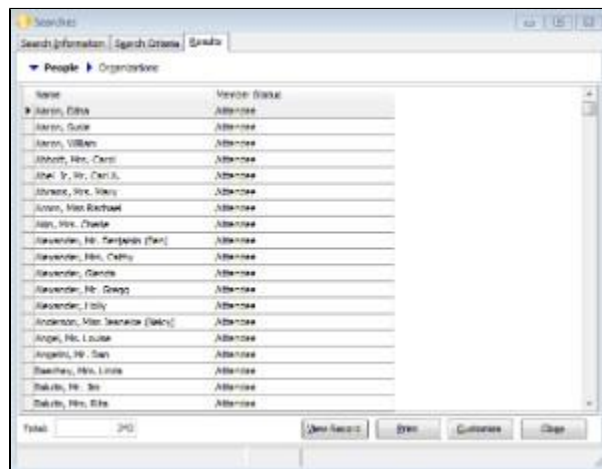
## Search Date

You can change the **Search Date** if it affects your search. For example, if you are searching for everyone who will be a certain age by a certain date.

## Working with Search Results





After you process a search, use the Results tab to view the records returned. The Results tab is divided into two sub-tabs, People and Organizations. If your search included both individual and organization records, results display on each respective sub-tab.

You can customize the results window to view additional fields and export your results to a file. You can also create labels, reports, mail merges, and mass emails based on the records returned. If you need to create a specific list of individuals who have no search criteria in common, you can also edit your results and save them.



## Customizing the Results Grid

You can customize the results grid to display additional fields and change the format of names. This is helpful if you want to export your results to excel.

1. On the **Results** tab, click **Customize**.
2. In the **Available Fields** list, select a field you want to display and click **Add** . Continue until all fields you want to display are listed in **Selected Fields**.
3. To remove a field, select it from the **Selected Fields** list and click **Remove** .
4. To arrange the order of the columns, use **Up**  and **Down** .
5. On the **Options** tab, under **Name Options**, select the options for name formatting you want to use.

6. Under **Sort Options**, select **Last Name** to sort by last name or select **Custom** to sort by any of the columns in the results grid. If you select **Custom**, you can click on a column heading to sort by it.
7. Click **OK** to return to the **Results** tab.

## Exporting Search Results to a File

You can export your results to an HTML or Microsoft® Excel® file by right-clicking within the Results tab. You can also use Advanced Exports to export your results to a file.


The HTML file displays the table as it exists on the Results tab so you can view it in a browser, use it on your website, or email it as an attachment. The Microsoft Excel file exports with the same column headings in the results list in ACS. You can customize the headings that display in the Results tab to display a variety of fields.


1. After you process a search, click the **Results** tab.
2. Right-click within the results grid and select **Export to HTML**.
3. Enter a **File Name** and select a folder to save the file in.
4. Click **Save**.

1. After you process a search, click the **Results** tab.
2. Right-click within the results grid and select **Export to Excel**.
3. Enter a **File Name** and select a folder to save the file in.
4. Click **Save**. The file automatically opens.

## Using Search Results with ACS Reports

From Searches, you can generate ACS Reports and labels based on those in your search results.

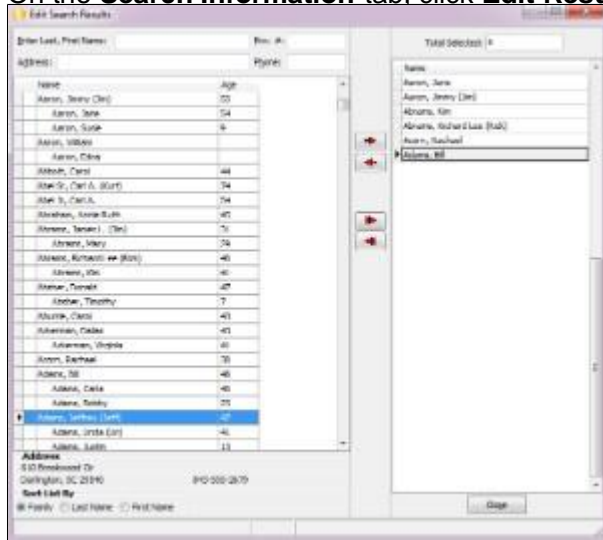
1. After you process a search, click the **Search Information** tab.
2. Click **Reports**.
3. On the ACS Reports window, select and customize the report you want to use.
4. Once you have customized the report, preview and print it using the **Print**  option at the top of the Reports window.


1. After you process a search, click the **Search Information** tab.
2. Click **People Labels**.
3. On the ACS Reports window, select and customize the labels you want to use.
4. Once you customize your labels, preview and print them using the **Print**  option at the top of the Reports window.

## Editing, Saving, and Loading Search Results

In some situations, you may need to edit your search results. This is usually done in situations where you want to print mailing labels or send a mass email to a group of individuals, yet there is not a search you could process that would return just those people.

1. On the **Search Information** tab, click **Edit Results**.



2. To add an individual to the list, highlight the name you want to add and click **Add** .
3. To remove an individual from the list, highlight the name you want to move and click **Remove**



4. Click **Close**.

### Tip

You can enter a last name, address, envelope number, or phone number to locate an individual to add them to the list of results.

You can also save your search results so you do not have to recreate this list each time you need it.

1. On the **Search Information** tab, click **Save Results**.
2. Enter a **Title** for these results. **Optional:** Select **Public** if you want other users in your church or organization to be able to load these results.
3. Click **Save**.

Once you save your results, you can load them at any time.

1. On the **Search Information** tab, click **Load Results**.
2. Select the results you want, then click **Load**.


## Advanced Searching Techniques

# Compiling a List of Random Individuals

In some situations, you may need to edit your search results. This is usually done in situations where you want to print mailing labels or send a mass email to a group of individuals, yet there is not a search you could process that would return just those people.

To compile this type of list you can use the Edit Search Results option.

1. On the **Search Information** tab, click **Edit Results**.

2. To add an individual to the list, highlight the name you want to add and click **Add** .
3. To remove an individual from the list, highlight the name you want to move and click **Remove**



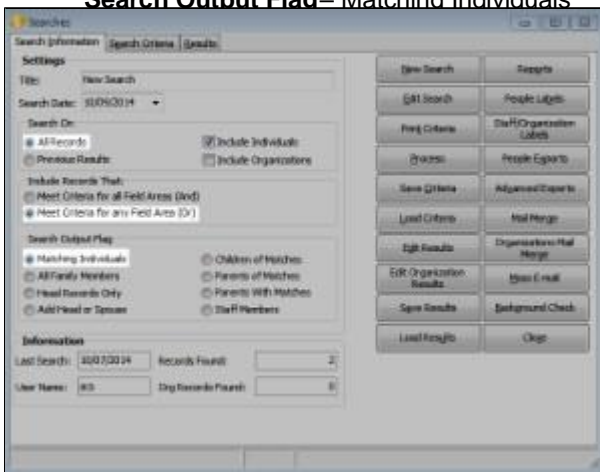
# Searches Using Previous Results

Processing a search using previous results is necessary in some cases, depending on your search criteria.

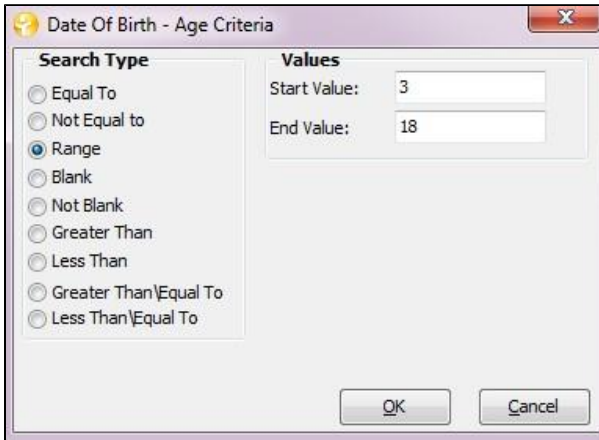
For example, you may want to search for people who have a Member Status of Member, and are either between the ages of 3 and 18 *or* are enrolled in Sunday School.

In this scenario, you would first search for those who are between the ages of 3 and 18 *or* who are enrolled in Sunday School. After processing this search, you would search your previous results for those with a Member Status of Member.

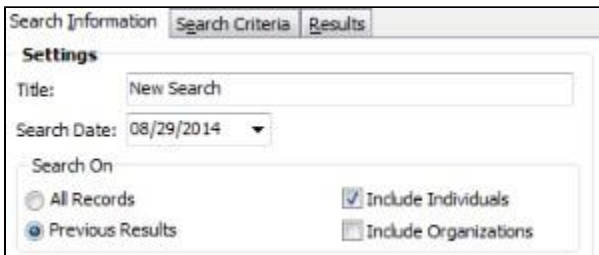
1. On the **Search Information** tab, select the following Settings:
  - **Search On** – All Records, Include Individuals
  - **Include Records That**– Meet Criteria for any Field Area (Or)
  - **Search Output Flag**– Matching Individuals



2. Click **New Search**. On the **Search Criteria** tab, expand **Individual**.
3. Expand **Dates**, then expand **Date of Birth**.
4. Double-click **Date of Birth - Age**.
5. Under Search Type, select **Range**. In the **Start Value** field enter **3**, and in the **End Value** field enter **18**.



6. Click **OK**.
7. Double-click **Class Rosters**.
8. Select your Sunday School **Master Group** from the drop-down list.
9. Depending on how your master group is set up, you can select **All Levels** to search through the entire master group or you can select a specific division or department.
10. Click **OK**, then click **Process**.
11. Click on the **Search Information** tab. Under Settings, Search On, select **Previous Results**.



12. Click **New Search**. On the **Search Criteria** tab, expand **Individual**, then expand **Lists**.
13. Double-click **Member Status**.
14. Select **Member**, then click **OK**.
15. Click **Process**

## Searching by Date

Under each Date field listed in Available Fields, there are four subfields you can select for searching. These subfields are Month, Day, Year, and Age. You can search for an exact date by selecting the main date field, such as Date Joined. However, if you want to search for all members with birthdays in November, you can select Date of Birth - Month.

The following are some date search examples:

- If you want to find everyone with an entry date of 01/01/2014 to 06/30/2014, you should select Entry Date on the Available Fields list. Select Range for the Search Type and key in the beginning and ending dates of the range you are searching for.
- If you want to find everyone with a birthday in June, you should select Date of Birth - Month on the Available Fields list. Select Equal To as your Search Type and 06 as your Value.
- If you want to gather weekly results from a certain time frame, without having to enter specific dates every time you conduct the search, you should use the Fuzzy Date option within your Date criteria.



## Date Subfields

If you select a subfield for a date (Month, Day, Year, or Age), you will enter a numeric value to search on rather than selecting a date. For example, if you want to search for all members who are 50 years old, you would select Date of Birth - Age and enter "50" in the Value field.

## Searching for Organizations Staff Members

There are two ways you can search for staff members:

- You can select Organizations criteria and specify that you only want staff member records returned. By default, all current staff are included. If you want to refine your search further, we recommend using the Staff Members criteria instead.
- You can use the Staff Members criteria to refine the results to include a specific position, status, start and end dates, and more.
  1. Under Searches and Reports, click **Searches**.
  2. On the **Search Information** tab, select the appropriate search settings. Make sure **Staff Members** is selected as the **Search Output Flag**.
  3. Click the **Search Criteria** tab.
  4. On the **Available Fields** list, select the **Organizations** criteria you want to search on.
  5. After you select the criteria for your search, click **Process**.

1. Under Searches and Reports, click **Searches**.
2. On the **Search Information** tab, select the appropriate search settings. Make sure **Matching Individuals** is selected as the **Search Output Flag**.
3. Click the **Search Criteria** tab.
4. On the **Available Fields** list, select **Staff Members** and then click **Add**.
5. Select the criteria you want in your results and click **OK**.
6. Click **Process**.

## Using the Active Address Criteria

The Active Address Flags search criteria is available under the Address > Lists section of the Available Fields list. This option gives you the ability to search for addresses with the selected Active Address Flags.

Active Address Flags criteria should only be used in conjunction with another address criteria search. For example, you can search for addresses in a specific City that have an Active Address Flag of Mailing.

## Searching for Records with Missing Information

You can process a search to see who has missing information on their record. For example, you can process a search to see who doesn't have a Member Status assigned or who has a blank birthday.

1. Under Searches and Reports, click **Searches**.
2. On the **Search Information** tab, select the appropriate search settings.
3. Click **New Search** to access the **Search Criteria** tab and clear the previous search.
4. Under Available Fields, select the criteria you want to search for.
5. If the criteria is a list, select **<Blanks>** under Search Values. If the criteria is a date or a field, select **Blank** under Search Type.
6. Click **OK**, then click **Process**.

## Search Examples

Sometimes getting a clearer picture of a concept is as simple as seeing a working example. Here are a few to get you started.

### Pledged last year but not this year

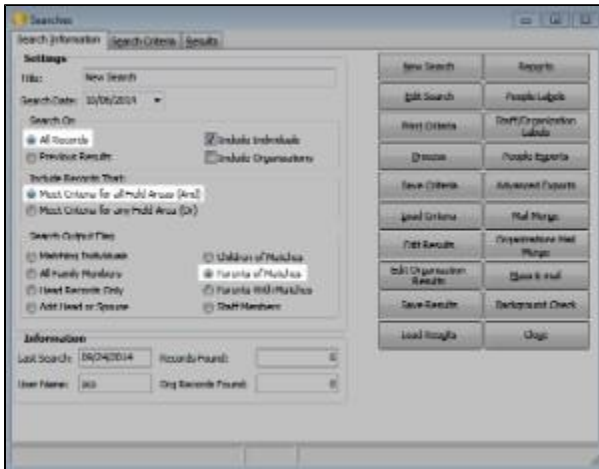
After you've entered pledge cards for the current year, you may want to search for those who pledged last year but not this year.

1. Under Searches and Reports, click **Searches**.
2. On the **Search Information** tab, select the following:
  - **Search On** – All Records, Include Individuals
  - **Include Records That** – Meet Criteria for all Field Areas (And)
  - **Search Output Flag** – Matching Individuals
3. Click **New Search**. On the **Search Criteria** tab, double-click **Pledges**.
4. Select **Has Pledge**.
5. Under Pledge Start/Stop, from **Fuzzy Date**, select **Last Year** from the drop-down list.
6. **Optional:** If you are searching for those who pledged to a specific fund, under Filter Values, from **Fund**, select the fund from the drop-down list.
9. Select **Has no Pledges**.
10. Under Pledge Start/Stop, from **Fuzzy Date**, select **This Year** from the drop-down list.
11. **Optional:** If you are searching for those who pledged to a specific fund, under Filter Values, from **Fund**, select the fund from the drop-down list.

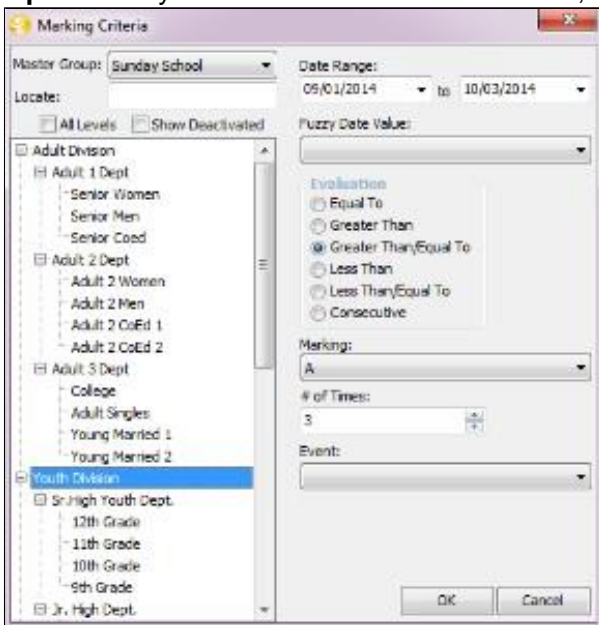
### Absent three or more times in a month

You can process a search to see who has been absent or present for a specific amount of time. For example, you may want to process a search for parents whose children have been absent from Sunday School 3 or more times within the last month. This way, you can send an email to the parents to check in on the children.

1. Under Searches and Reports, click **Searches**.
2. On the **Search Information** tab, select the following:
  - **Search On** – All Records, Include Individuals
  - **Include Records That** – Meet Criteria for all Field Areas (And)
  - **Search Output Flag** – Parents of Matches



3. Click **New Search**. On the **Search Criteria** tab, double-click **Attendance**.
4. Select the **Master Group** from the drop-down list.
5. In the left pane, select the division, department, or class you want to search on. If you want to search on the entire master group, select **All Levels**.
6. Under **Date Range**, enter the beginning and ending dates you want to search through for Attendance markings.
7. Under **Evaluation**, select (for this example):
  - **Greater Than/Equal To**
  - **Marking – A**
  - **# of Times – 3**
8. **Optional:** If you want to search an **Event** time, select it from the drop-down list.



9. Click **OK**.
10. Click **Process**.

On the Results tab, you'll see the parents whose children met the search criteria. To send an email to the parents, right-click within the results and select Mass E-mail. You can also select the Mass E-mail option from the Search Information tab.

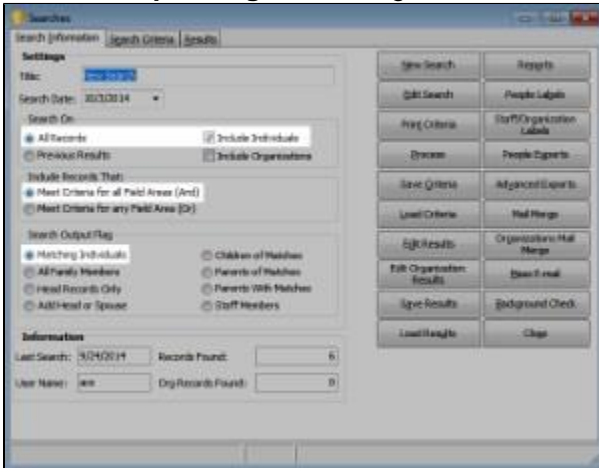
# First-time visitors entered today

Many churches send welcome letters to their first-time visitors. Let's say you've entered the first-time visitors into the People module today with a Member Status of Visitor.

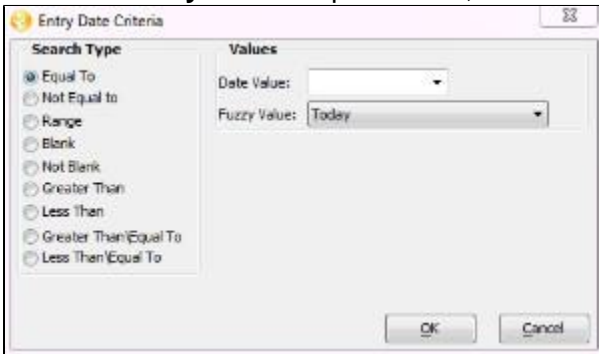
In this example, you would search on the Entry Date of today and the Member Status of Visitor.

Once you process the search, you can use the Mail Merge option to create letters. You can use an existing document or create a new one, and you can insert fields such as names and addresses.

1. Under Searches and Reports, click **Searches**.
2. On the **Search Information** tab, select the following:  
**Search On** – All Records, Include Individuals  
**Include Records That** – Meet Criteria for all Field Areas (And)  
**Search Output Flag** – Matching Individuals

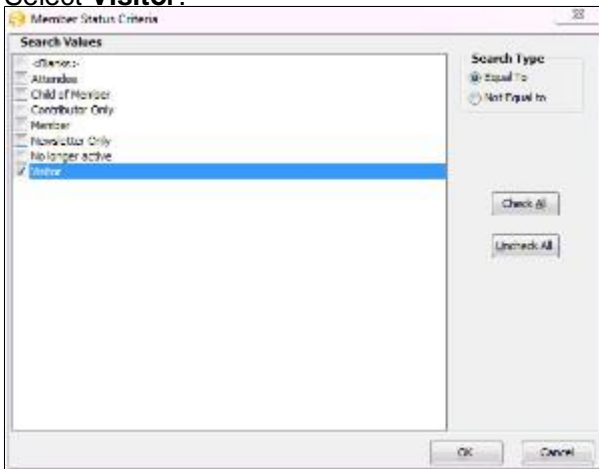


3. Click **New Search**. On the **Search Criteria** tab, expand **Individual**.
4. Expand **Dates**, then double-click **Entry Date**.
5. Click **Equal To**.
6. From the **Fuzzy Value** drop-down list, select **Today**.

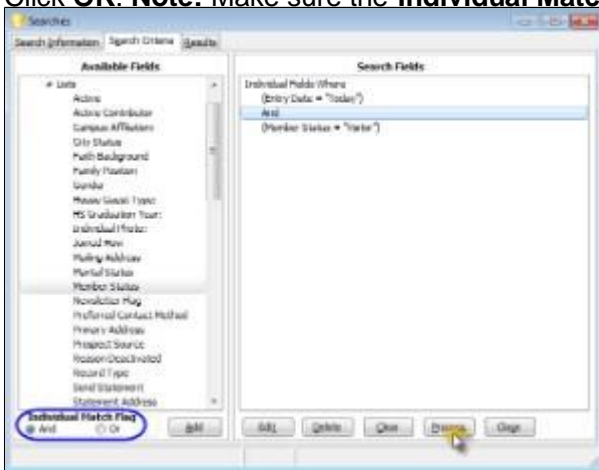


7. Click **OK**.
8. Under Individual, expand **Lists**.
9. Double-click **Member Status**.

10. Select Visitor.



11. Click OK. Note: Make sure the Individual Match Flag is set to And.



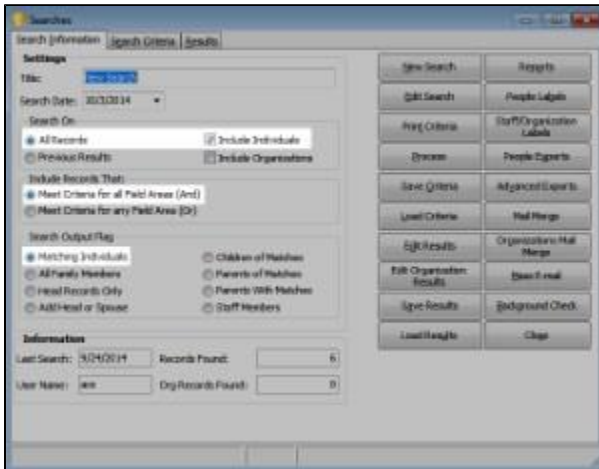
12. Click Process.

## Searching for a comment type containing a certain word

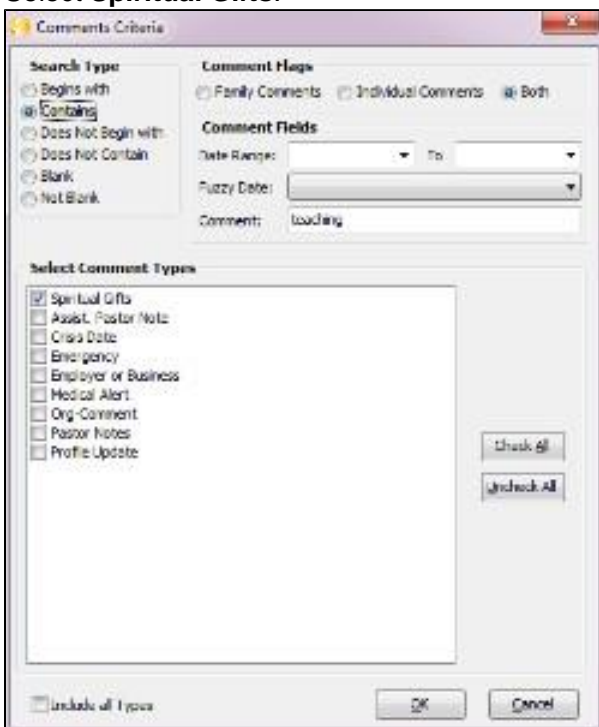
Some churches use the Comments tab on individual and family records to keep track of spiritual gifts. Suppose you have a comment type called Spiritual Gifts and you want to search for those who have the gift of teaching.

After you process this search, you can export the results into a report, print mailing labels, process a mail merge, or send a mass email.

1. Under Searches and Reports, click **Searches**.
2. On the **Search Information** tab, select the following:  
**Search On** – All Records, Include Individuals  
**Include Records That** – Meet Criteria for all Field Areas (And)  
**Search Output Flag** – Matching Individuals



3. Click **New Search**. On the **Search Criteria** tab, double-click **Comments**.
4. Under Search Type, select **Contains**.
5. Under Comment Flags, select **Family Comments**, **Individual Comments**, or **Both**.
6. Under Comment Fields, enter **teaching** in the **Comment** field.
7. Under Select Comment Types, clear the **Include all Types** check box. The comment types display. Select **Spiritual Gifts**.



8. Click **OK**, then click **Process**.

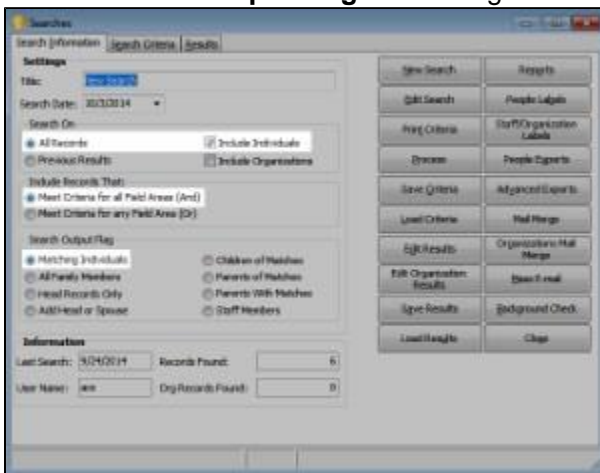
# Members with birthdays but no email addresses

Suppose you send birthday greetings to church members each month. You send the birthday wishes by email, but there are some members who don't have an email address, so you want to send them a postcard.

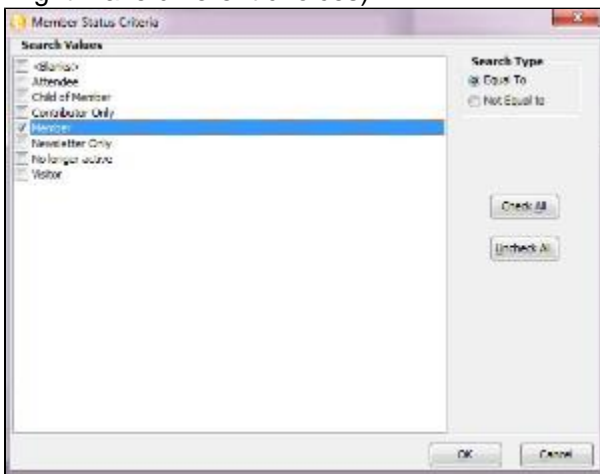
Let's say you need to get the list of those to send postcards to. After you process your search, click People Labels on the Search Information tab to create labels for your postcards.

## To find members with no email address that have a birthday next month

1. Under Searches and Reports, click **Searches**.
2. On the **Search Information** tab, select the following:
  - **Search On** – All Records, Include Individuals
  - **Include Records That** – Meet Criteria for all Field Areas (And)
  - **Search Output Flag** – Matching Individuals

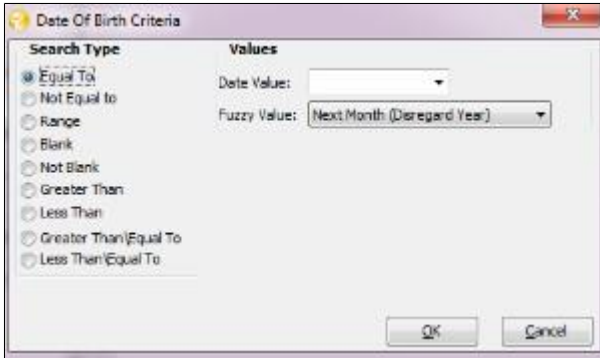


3. Click **New Search**. On the **Search Criteria** tab, expand **Individual**.
4. Expand **Lists**, then double-click **Member Status**.
5. Under **Search Values**, select **Member** (depending on what you set up as your member statuses, you might make different choices).



6. Click **OK**.
7. Expand **Dates** (under Individual), then double-click **Date of Birth**.

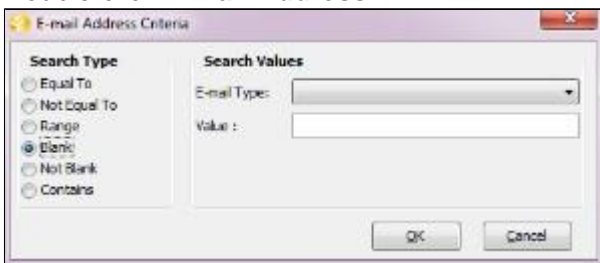
8. In the **Fuzzy Value** drop-down list, select **Next Month (Disregard Year)**.



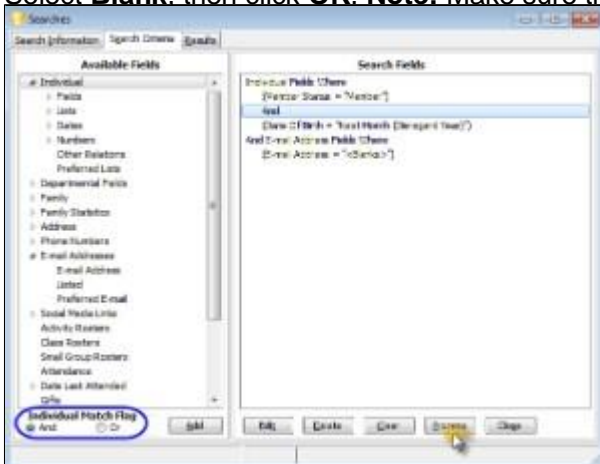
9. Click **OK**.

10. Expand **E-mail Addresses**.

11. Double-click **E-mail Address**.



12. Select **Blank**, then click **OK**. **Note:** Make sure the **Individual Match Flag** is set to **And**.



13. Click **Process**.

## Searching for All Family Members

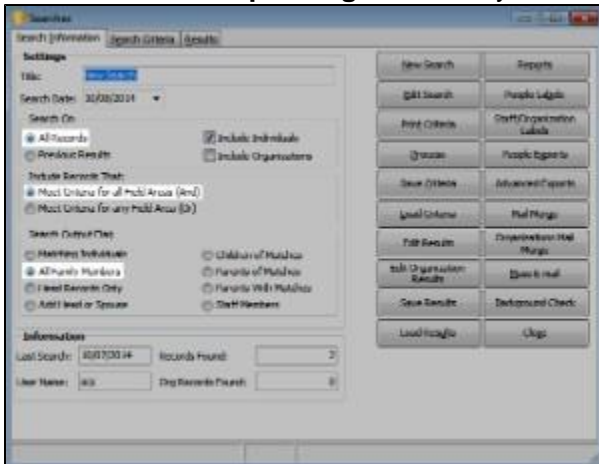
For some searches, you will want to use the output flag of All Family Members. Suppose you want to create a People Directory for everyone in your church with a Member Status of Member and include those in their household.

**To search for all members including everyone in their household**

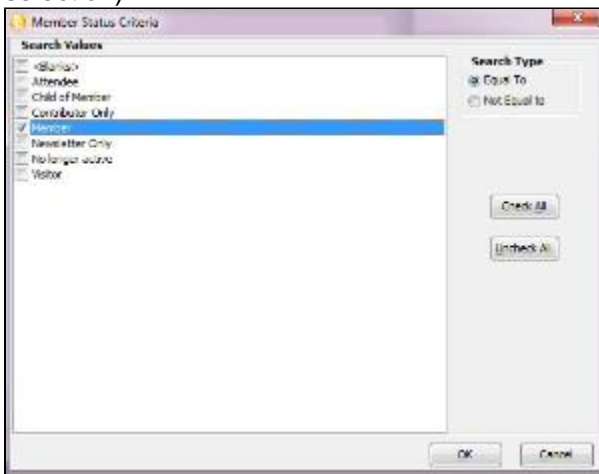
1. Under Searches and Reports, click **Searches**.
2. On the **Search Information** tab, select the following:



- **Search On** – All Records, Include Individuals
- **Include Records That** – Meet Criteria for all Field Areas (And)
- **Search Output Flag** – All Family Members



3. Click **New Search**. On the **Search Criteria** tab, expand **Individual**.
4. Expand **Lists**, then double-click **Member Status**.
5. Select **Member**. (Depending on how your member statuses are set up, you may make a different selection).



6. Click **OK**, then click **Process**.

Once you process this search, you can select Reports from the Search Information tab to create your People Directory. When you customize this report, make sure that the option Use Last Search Results is selected and that Filter is not selected.

## MissionInsite Exports

MissionInsite is a set of tools you can use to better understand the community in and around your church. Our analytics and reports show you key behavioral, socio-economic, financial, religious, and demographic characteristics.

While you may already track some of this information about your parishioners, MissionInsite reveals strategic needs and opportunities in your community. This allows you to turn the data into decisions and take actionable steps to improve your outreach.

For example, using the PeoplePlot tool, you can plot parishioners and constituents on a mapping interface. From the map, you can determine the size of your ministry area, visualize your reach into the community, and more.

Learn more about how MissionInsite works and view sample maps and reports on our website, [MissionInsite.com](http://MissionInsite.com).

To register for an account, contact us via our website or at [misupport@acst.com](mailto:misupport@acst.com).

After you register, you can export your ACS member and financial data, then import it into MissionInsite.

## Export data from ACS

Before you can plot congregants in MissionInsite, you must export your congregants' names, addresses, and other related information from ACS.

1. Process a search that includes the records you want to import into MissionInsite.
2. On the **Search Information** tab, click **MissionInsite Export**.
3. Select **People Export for MissionInsite** or **Giving Export for MissionInsite**. If you select the giving export, select the **Date Range**.
4. Select the **Export Location**. When your export is complete, it's saved in this folder on your computer.
5. Click **Run Export**.

## Review the MissionInsite Export

After downloading the export, you can open the file in Microsoft Excel or import it into Google Sheets. You must review certain fields before importing the file into MissionInsite. After reviewing and editing the file, save it as an .XLS or .CSV file.

## Import the file into MissionInsite

After reviewing and updating your export, it's time to import your congregant list to MissionInsite and plot people.

1. Log into MissionInsite with your username and password.
2. If your organization has multiple studies, under **Which Study Would You Like to Work With?**, select your study's name.
3. Under **What Would You Like to Do?**, click **People Plot**.
4. Click **Upload People**, then **Next**.

5. Select a **Study** and **People Type**, then click **Next**.
6. Enter a **Submitted By** name and **Email**, then click **Next**.
7. Under **Text Attribute Mapping**, update the **Actual Codes** for **Member Status** and **Member By Means**, if applicable. Click **Next**.
8. Under **Congregants (Default) Upload**, click **Choose File**.
9. Choose the file you exported from ACS People Suite, then click **Open**.
10. Click **Next**.
11. If your uploaded file contains any errors, those display. Open the file in Excel and correct any errors. After correcting the errors, click **Previous**, upload the file again, and click **Next**.

After uploading, MissionInsite queues and processes your data. You'll receive an email when this is completed. Then, you can log in and view your congregants on the plotted map.