



ACS People Suite – Tools



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People Suite Tools

The ACS People Suite offers several tools to help you accomplish your church or organization's goals. To learn more about a page, see the links below.

Background Checks

In today's world, it's important to know exactly who is volunteering, serving, working, and caring for your church or school family. That's why we've partnered with Verified First to bring you comprehensive, detailed, and convenient background checks.

Background Checks features include:

- **A secure online application.** Protect applicants by allowing them to enter their personally identifiable information at their convenience. You can launch email invitations straight from the product and reports sync back to individual profiles.
- **Additional controls over staff rights.** Choose who can submit background checks, view results, or do both.
- **Pay one bill, not two.** We've consolidated billing, so you'll receive just one statement from ACS Technologies. Use the Reference Code field inside Verified First to enter a ministry area's GL code, so you know where to apply charges when you receive your bill.
- **Comprehensive results.** Verified First offers several background check packages to fit your church's needs. All packages include a Nationwide Criminal Search and Social Security Number trace.

Getting Started

Before processing background checks, you'll need to update your ACS or HeadMaster software to the latest version and sign up for eBilling.

If you're new to background checks within ACS, you must sign up for a VerifiedFirst account. Your church only needs one Verified First account- every staff member who requests or reviews background checks use this account.

1. Log into ACS People Suite as an administrator.
2. Under **Manage Records**, click the **People** tab.
3. In the drop-down list, select **View/Edit Individual** and click **Go** .
4. Select the individual whose background check you are requesting and click **View/Edit**.
5. On the **Safeguard** tab, click **Request Background Check**.
6. Complete and submit the online agreement for service to Verified First.

Verified First will contact you to review it and process the agreement, and they will send you an email update when finished.

After Verified First processes your agreement, you can click **Request Background Check** to access the background check application at any time.

Setting up Background Check Permissions

Background check results contain sensitive information, so you may want to restrict staff members' rights.

Only staff members with proper access can view the Safeguard tab, request background checks, review background checks, or view comments associated with background checks. You can edit security levels in Add/Edit Users.

About granting and restricting permissions

You must give new users with **All** rights access to Verified First to order background checks and view reports. If you remove a user's rights in ACS People Suite, you must also remove them in Verified First.

If you restrict an individual from requesting or reviewing background checks but do not restrict his rights to the other options, the individual can still view any notes about results that are entered in Safeguard Comments or Safeguard Tasks.

To Edit a Staff Member's Safeguard Access:

1. Under **Advanced Tools**, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go**.
3. Select the user whose security you want to change and click **Edit**.
4. Click the **Security** tab.
5. Expand **People**, then scroll to Safeguard Background Checks, Safeguard Comments, Safeguard Tasks, and Safeguard Tasks Mass Create and Update.
 - To grant an individual full rights to all background check features within ACS, select **All** for all Safeguard permissions.
 - To restrict an individual from requesting or reviewing background checks in Verified First, but grant rights to view the Safeguard tab and any comments and tasks, select **None** for Safeguard Background Checks, and **All** or **View** for Safeguard Comments, Safeguard Tasks, and Safeguard Tasks Mass Create and Update.
 - To restrict an individual from the Safeguard tab, including requesting and reviewing background checks as well as comments and tasks, select **None** for all Safeguard permissions.
6. When you're finished, click **OK**.

Tracking Background Check Processes and Results with Safeguard Tasks

Safeguard Tasks let you manually track your background check process and results.

Tasks consist of Task Descriptions and Task Statuses.

- **Task Descriptions** describe tasks you're tracking related to background checks. For example: Signed Consent Form, Drive Church Vehicle, and Work with Children might be task descriptions.
- **Task Statuses** describe the results. For example, Yes, No, Pending, and Restrictions Apply could be task statuses.

You can enter comments for each task, which is helpful if you want to enter notes related to background checks or their results. You can also track dates on tasks, which is helpful if you want to track when a background check was completed so you'll know when to request a new one

Set up task permissions

Before setting up Safeguard tasks, set up Safeguard permissions in Add/Edit Users.

Task permissions are especially important if you choose to enter sensitive information in Safeguard tasks and comments. If you restrict an individual from requesting or reviewing background checks but do not restrict his rights to the other options, the individual can still view any comments and tasks that may contain information about results.

Set up task descriptions and statuses

In Define Lists, you can set up Task Descriptions and Task Statuses based on your background check processes and results.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. In the Define Lists window, expand **Safeguard**, then click **Task Description** or **Task Status**.
4. To add tasks, click **Add**.
5. Enter a task in the **Field Description** field.
6. **Optional:** Select **Add Another** to add several items at one time.
7. Click **OK**.
8. To edit a task, select it and click **Edit**.
9. Make the necessary changes and click **OK**.

After setting up Safeguard task permissions, descriptions, and statuses, you can add tasks to individual records or multiple individuals' records

Adding and Updating an Individual's Safeguard Tasks

Once you've set up Safeguard tasks, you can add tasks to individual records.

On the individual's **Safeguard** tab, you can add new Safeguard tasks and edit existing ones. For example, if an individual returns a signed consent form, you can update the individual's record to reflect that it was returned and include the date. You can review tasks and the comments associated with them at any time.

You can also edit or delete a task from an individual's record. Don't worry- you can still always click **Review Background Checks** to view the background check results.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. Select the person's record and click **View/Edit**.
4. On the **Safeguard** tab, click **Add**.
5. In the **Description** drop-down list, select a description for the task.
6. In the **Status** drop-down list, select a status for the task.
7. If the task is complete, enter the date the task was completed. If the task has not been completed, do not select a date; you can enter a completion date at a later time.
8. If you want to enter a comment for the task, do so in the **Comment** field.
9. To add another task for this individual, select **Add Another**.
10. Click **OK**.

Print Tasks

You can print the Safeguard Tasks grid for an individual's record as it displays in the View/Edit Individual window.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. Select the individual whose Safeguard tasks you want to print and click **View/Edit**.
4. Click the **Safeguard** tab, then click **Print**.
5. A report containing the individual's Safeguard tasks will appear. To print the report, click **Print**.

You can also print the Listing of Safeguard Tasks. This report is a list of individuals with their Safeguard tasks and comments, name, address, and phone number.

Adding and Updating Safeguard Tasks for Multiple Individuals

You can create several tasks at once for individuals based on search results.

Suppose you created a task called Signed Consent Form to track when an individual consent to a background check. You can search on all staff members who do not have a Safeguard task entered for Signed Consent Form, then create a task for all of them.

When you mass create the tasks, you can select the description, status, and enter a comment.

1. Under **Searches and Reports**, click **Searches**.

2. Select the appropriate options from the **Search Information** and **Search Criteria** tabs to perform your search.
3. Click **Process** on the **Search Criteria** tab to process the search.
4. Click **OK**.
5. On the **Results** tab, right click within the window and select **Create Safeguard Tasks**.
6. Select the **Description**.
7. **Optional:** Select the **Status**, **Date Completed**, and enter a **Comment**.
8. Click **OK**.
9. A confirmation message displays. Click **Yes** to continue.

You can update several tasks at one time based on search results. You can change the task description, status, or both, and you can also insert or replace the comments on your Safeguard tasks.

From the example above, suppose you've received signed consent forms from the individuals. You can update the Signed Consent Form task to display a result of Complete.

We highly recommend making a backup before processing a mass change of your Safeguard tasks.

1. Under **Searches and Reports**, click **Searches**.
2. Select the appropriate options from the **Search Information** and **Search Criteria** tabs to perform your search.
3. Click **Process** on the **Search Criteria** tab to process the search.
4. Click **OK**.
5. On the **Results** tab, right click within the window and select **Update Safeguard Tasks**.
6. Under **Safeguard Task Before**, select the **Description** and **Status**. If you want to select a specific completed date, clear the **All Dates** checkbox and select or enter a date in the **Date Completed** field.
7. Under **Safeguard Task After**, select the **Description** and **Status** that the tasks will be changed to. If you want to change the completed date, clear the **Retain Value** checkbox and select or enter a date in the **Date Completed** field.
8. In the Comment box, enter the comment you want to insert for these tasks. Select **Insert Comment** to add the comment, or **Replace Comment** to replace the current comment on the task.
9. The tasks that will be changed will display in the grid below. Click **Update** to update the tasks.
10. A confirmation message displays. Click **Yes** to continue.

Viewing the Listing of Safeguard Tasks Report

The Listing of Safeguard Tasks report creates a list of individuals with Safeguard tasks. The report includes the task's status as well as the date the task was updated in ACS, and you can also include comments.

Each individual's name, address, and phone number is included on this report, which is helpful if you need to get in touch with a background check applicant with questions.

You can customize this report for specific Safeguard tasks. For example, you track individuals with permission to drive the church vehicle, and it's time to request new background checks for them. You can set up the report to only include individuals with the Drive Church Vehicle task. The report also displays the task's status and the date the task was last updated in ACS. You can then use this report to see which drivers haven't had a recent background check.

To generate this report, you must have **View** rights to Safeguard Comments and Safeguard Tasks. To learn more, see Setting up Background Check Permissions.

To view the Listing of Safeguard Tasks

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **People Reports**, then click **Go** .
3. In the upper sidebar, under **People Reports**, expand **Lists**.
4. Select the **Listing of Safeguard Tasks** report and click **Customize**.
5. On the **Report Options** tab, select any options to exclude or include on the report.
6. To view a listing for a specific task, under **Formatting**, select **Print Safeguard Tasks**, then click **Select**. Use the arrows to choose which tasks to print.
7. Click **Preview**.

Background Check Documents and Consent Forms

Federal law requires that an individual give his or her signed consent to perform a background check. You can obtain this electronically and create customized forms for your organization.

Electronic Consent

When requesting a background check inside Verified First, you can send individuals an electronic form to verify information and consent. This protects applicants by allowing them to enter their personally identifiable information at their convenience.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. Select the individual whose background check you are requesting and click **View/Edit**.
4. On the **Safeguard** tab, click **Request Background Check**. You will be redirected to Verified First, a separate Web application used for the background checks.
5. If prompted, enter your Verified First **Username** and **Password** in the fields, click **Log In**. To save your user name and password, select **Remember Me**.
6. When the order form displays, verify the applicant's Personal Information, which is uploaded from ACS People Suite.
7. In the drop-down list, select the appropriate **Package** based on which background check you're requesting.
8. To email the applicant a link to consent to and complete the background check, click **Send Invite**.
9. Read the certification message that displays, select the checkbox, and click **Send**.

Requesting Background Checks

On the Safeguard tab, you can request background checks.

You can also add tasks to track an individual's background checks and the results. If you need to request an updated background check after a period of time, you can also do that on this tab.

To request a background check

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select the individual whose background check you are requesting and click **View/Edit**.
4. On the **Safeguard** tab, click **Request Background Check**. You will be redirected to Verified First, a separate Web application used for the background checks.
5. If prompted, enter your Verified First **Username** and **Password** in the fields, click **Log In**. To save your user name and password, select **Remember Me**.
6. When the order form displays, verify the applicant's Personal Information, which is uploaded from ACS People Suite.
7. In the drop-down list, select the appropriate **Package** based on which background check you're requesting.
8. To email the applicant a link to consent to and complete the background check, click **Send Invite**. To enter the background check information yourself, click **Next**.
9. If you enter the background check information yourself, enter any required information in each step, then click **Next**. If the information is on the applicant's individual record in ACS People Suite, it displays in the fields.

After you request a background check, you may want to enter a Safeguard task to track when it was requested. You can enter information about the results in the comments, and only those with adequate permissions in ACS can view them.

Once background checks are complete, you'll receive an email from Verified First., and you can view the results inside ACS.

Requesting Background Checks for Multiple Individuals

You can request background checks on multiple individuals, which is helpful if you need to run several background checks on individuals who have something in common, such as children's church volunteers, nursery workers, or teachers in your school. You can search for those individuals, set up Safeguard tasks, and run background checks at once.

You can review all individuals before submitting background check requests. If an individual's profile is missing information needed for a background check (such as an email address), this displays as well.

Before you can request background checks for multiple individuals, you must have permission to Safeguard Tasks Mass Create and Update in Add/Edit Users.

To request background checks for multiple individuals

1. Under **Searches and Reports**, click **Searches**.
2. Select the appropriate options from the **Search Information** and **Search Criteria** tabs to perform your search.
3. Click **Process** on the **Search Criteria** tab to process the search.
4. Click **OK**.
5. On the **Search Information** tab, click **Background Check**.
6. To confirm that you want to run background checks for the records on the **Results** tab, click **Yes**.

7. The Background Checks Bulk Lists results window displays. To view records that cannot be processed and the reasons why, click **List of Invalid Records**. Otherwise, click **Continue**.
8. To create Safeguard tasks for the records uploaded, click **Yes** when the confirmation message displays.
9. When the Submit Background Check window displays, log into Verified First to request the background checks. To learn more about requesting background checks, see Requesting Background Checks.

Once background checks are complete, you'll receive an email from Verified First., and you can view the results inside ACS.

Reviewing Background Check Results

With adequate security rights, you can review background checks you have requested to see the status, individual who ordered the background check, date completed, and full details of the results.

To Review Background Check Results

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. Select the individual whose background check you want to review and click **View/Edit**.
4. On the **Safeguard** tab, click **Review Background Checks**.
5. In the Review Background Checks window, select the result you want to view, then click **View**.
6. If prompted, enter your Verified First **Username** and **Password** in the fields and click **Log In**. If you want to save your user name and password, select **Remember Me**.
7. After you log in, expand the **Complete** tab to view background checks results.

After reviewing the full results, you can use Safeguard Tasks to enter and track when an individual had a background check and any other information about the results. Staff members who do not have full access to request and review background checks within Verified First can view these tasks, dates, and comments.

Requesting Updated Background Checks

Your church may require volunteers to undergo updated background checks at the beginning of each school year. In Searches, you can find who need updated background checks and request them.

You can also use the **Safeguard** option under **Available Fields** in the Search Criteria tab to search for individuals who have had background checks conducted or who need to have them done. For example, if you want to run a new background check for all volunteers who had background checks conducted during January of the previous year, you can search for all volunteers checked the previous January and request background checks on those volunteers again.

To request updated background checks for multiple individuals

1. Under **Searches and Reports**, click **Searches**.
2. Select the appropriate options from the **Search Information** and **Search Criteria** tabs to perform your search.
3. Click **Process** on the **Search Criteria** tab to process the search.
4. Click **OK**.
5. On the **Search Information** tab, click **Background Check**.

6. To confirm that you want to run background checks for the records on the **Results** tab, click **Yes**.
7. The Background Checks Bulk Lists results window displays. To view records that cannot be processed and the reasons why, click **List of Invalid Records**. Otherwise, click **Continue**.
8. To create Safeguard tasks for the records uploaded, click **Yes** when the confirmation message displays.
9. When the Submit Background Check window displays, log into Verified First to request the background checks.

Requesting Updated Background Checks for One Individual

You can request an updated background check for one individual, which is similar to requesting an initial background check. To learn more, see Requesting Background Checks.

To request an updated background check

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. Select the individual whose background check you are requesting and click **View/Edit**.
4. On the **Safeguard** tab, click **Request Background Check**. You will be redirected to Verified First, a separate Web application used for the background checks.
5. If prompted, enter your Verified First **Username** and **Password** in the fields, click **Log In**. To save your user name and password, select **Remember Me**.
6. When the order form displays, verify the applicant's Personal Information, which is uploaded from ACS People Suite.
7. In the drop-down list, select the appropriate **Package** based on which background check you're requesting.
8. To email the applicant a link to complete the background check, click **Send Invite**. To enter the background check information yourself, click **Next**.
9. If you enter the background check information yourself, enter any required information in each step, then click **Next**. If the information is on the applicant's individual record in ACS People Suite, it displays in the fields.

Maintaining Background Checks

Each month, our background check partner, Verified First, purges background checks that are older than two years. This purge does not change the background check information that's stored on the Safeguard tab.

Based on the Verified First End-User Agreement (Page 1 Section 4 Item C), you must have a reasonable procedure for maintaining and storing these older background checks. You can do this by exporting your data from Verified First and storing these as PDF files in a secure location outside of ACS.

Here are some suggestions for maintaining your background checks

- Download your background check files in the PDF file format.
- Save any disclosure and authorization forms as PDFs as well.
- Store these files in a secure location outside of ACS.

Verified First sends an email at the beginning of each month that lets you know if any of your background check data will be purged that month. You'll only receive this email if you ran one or more background checks two years prior during that month.

Each email includes information on when your data will be purged as well as instructions on how to download your background checks.

To export data from Verified First

1. In the email from Verified First, click the link to log into your Verified First account.
2. Export your data from Verified First . You can download PDFs and attachments for multiple reports at one time.

ACS Sync

Using ACS Sync, you can upload records to the ACS Server using Access ACS.

- Configuring your Proxy Settings for Uploading Records
- Creating an Access ACS Account to Upload Records
- Uploading Records to Access ACS
- Working with Change Requests
- View Logs
- Sync with DioOffice

Configuring your Proxy Settings for Uploading Records

If you are using a proxy server, then you will need to configure your proxy settings when you upload records. These settings tell your computer how and where to upload the files.

You can also set up security settings for the upload through the proxy settings. You can select to require firewall authentication every time the upload process is run.

To configure your proxy settings

1. In the Upload Records window, click **Configure**. The Internet Connection Settings dialog box displays.
2. Enter your **Proxy Server Address**, **Proxy Server Port Number**, **User identification**, and **Password**.
3. Select **Firewall authentication required** if you want to require authentication every time you upload records.
4. Click **OK**.

Creating an Access ACS Account to Upload Records

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.

Uploading Records to Access ACS

As an ACS administrator, you can upload ACS records to Access ACS.

By default, all of your ACS records will be uploaded to Access ACS. But, if you want to upload only specific records, you can search for the ACS records that you want to upload. You can upload them according to your last search results or a saved search.

Once you know which records you want to upload, you can select specific data within those records to upload.

To upload records to Access ACS

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with Access ACS**, and click **Go** . The Upload to Access ACS window displays.
3. Mark your selections, and click **Upload** to complete the process.

Schedule Uploads

You can schedule your ACS People data uploads to Access ACS when you're away from the office so they don't interfere with your productivity.

The setup options window is where you select to run your uploads to Access ACS as a scheduled task. You also have the option to apply your change requests before uploading to Access ACS (this doesn't include flagged change requests).

When ACS performs a scheduled upload to Access ACS, it always uses the upload selections for your most recent manual upload. So, if you change your upload selections, you must first run a manual upload before the scheduled upload can detect your new selections.

For example, let's say you select to include phone numbers in the uploads but no longer include contributions. You'll need to run a manual upload with those new selections before they'll be included in scheduled uploads.

If you update your data, you must rerun your searches if you select the **Last Search Results** option or the **Organizations Search Results** option. For example, your church added two new members since your last upload to Access ACS. In that case, you'll need to rerun your search in order to include that new information in the upload.

ACS OnDemand

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

ACS for Windows

If your church uses ACS installed locally or on a network, your computer must be turned on in order to run a scheduled Access ACS upload.

We recommend that you run the scheduled upload with highest privileges.

To verify that your scheduled upload happened, view the **Update Log**.

1. a. Open the **Windows Control Panel**.
 - a.) **Windows 7:** On your Windows desktop, click the Start button  in the lower-left corner of the screen. A Windows context menu displays. On the right-side panel, click **Control Panel**. The Control Panel displays.
 - b.) **Windows 8.1 and Windows 10:** On the Windows desktop, right-click the Start button  in the lower-left corner of the screen. A Windows context menu displays. Click **Control Panel**. The Control Panel displays.
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**), and click **Next**.
5. Select the **Trigger** for the event, and click **Next**.
6. Select the date and time for the task to run, and click **Next**.
7. Select **Start a program** for the task, and click **Next**.
8. The Program/Script command should read **c:\winacslacsexport.exe**. (or, you can click **Browse** to select this).
9. In the **Add arguments (optional)** field, 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, and 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.

There might be times when you have to leave your workstation computer during a scheduled upload. If so, 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**.

Working with Change Requests

When someone makes a change to data in Access ACS, this creates a change request. To save the change, you must approve and apply it in ACS People Suite.

For example, James Aaron changes his member status in Access ACS.

This is a Change Request only. Changes are not applied to records until they are approved.

Submit Cancel

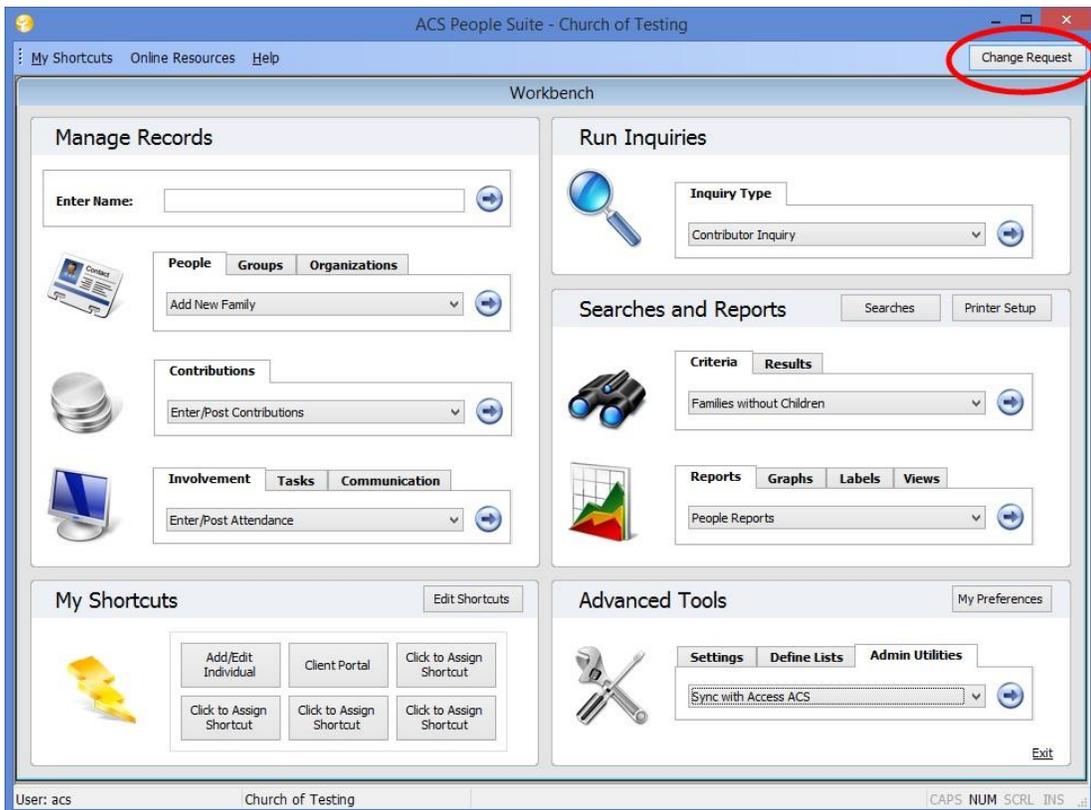
Personal Information for Aaron, James (Jim)

Title:	Mr.	Gender:	Male
First Name:	James	Date of Birth:	6/30/1996
Middle Name:		Marital Status:	Married
Goes-by Name:	Jim	Member Status:	Member
* Last Name:	Aaron	Joined How:	Activity Only
Suffix:		Date Joined:	Bible Study Only

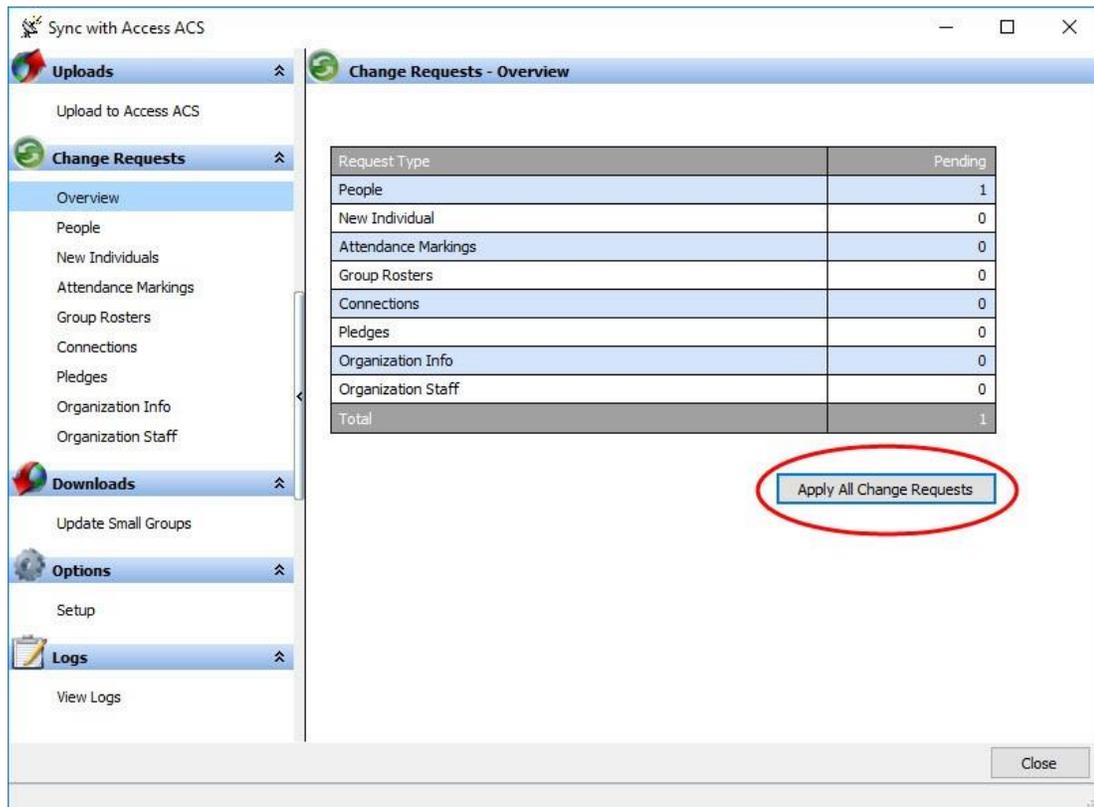
User Defined

Restrictions:	Hearing Impaired
Faith Background:	Lutheran
Blood Type:	
Blood Donor:	
Military Experience:	Veteran: Air Force
Reason Deactivated:	
Date Baptized:	12/07/1956
Date Confirmed:	05/03/1968
Date of Marriage:	03/07/1982
Date Deactivated:	

To review the change request in ACS People, click **Change Request**.



The Change Requests - Overview window displays the number of pending requests for each request type. You can view and apply requests individually or apply all requests.



You have more options for managing change requests. Your first step is to select your change request setup options

Change Request Setup Options

Scheduled Tasks

You can select to automatically apply change requests before uploading records to Access ACS.

Flag Change Requests for Review

You can select the types of change requests you want staff members to review before applying.

For example, if you select the **Last Name** check box, all change requests for last names display with a green flag next to them. These change requests remain unapplied until a staff member reviews and selects them.

Notifications and Rejection E-mail

You can send a rejection e-mail for each change request you delete.

In some cases, a member might want to reply to the rejection email. In the drop-down list, select the staff member who receives these replies.

To select how you want to be notified of change requests and compose a rejection email message, click **Change Request Setup**. This opens Access ACS. You can edit an entry in the Change Request Setup grid to make your notification selections and compose a rejection email message.

To select your change request options

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with Access ACS**, and click **Go** . The Upload to Access ACS window displays.
3. On the left-side column, click **Setup**.
4. Make your selections and click **Close**.

Apply All Change Requests

The Overview window displays the number of pending change requests, which are divided into categories in a grid.

From here, an administrator with appropriate rights can apply change requests.

Note

We recommend that you verify the change requests before applying them.

To apply all change requests

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with Access ACS**, and click **Go** . The Upload to Access ACS window displays.
3. Click **Apply All Change Requests**.

Verify and Apply Change Requests

People Change Requests

People change requests are created when members add or change specific information in Access ACS. For example, a member changes their member status or their address.

To verify and approve People change requests

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with Access ACS**, and click **Go** . The Upload to Access ACS window displays.

3. On the left-side column, click **People**. Before you apply change requests, you can review and edit them to make sure the changes are acceptable

New Individual Change Requests

New Individual change requests are created when new individual records are created in Access ACS. For example, a record is created in Access ACS when someone becomes a new member.

To verify and approve New Individuals change requests

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with Access ACS**, and click **Go** . The Upload to Access ACS window displays.
3. On the left-side column, click **New Individuals**. Before you apply change requests, you can review and edit them to make sure the changes are acceptable.
4. Click **Apply**.

Attendance Markings Change Requests

Attendance Marking change requests are created when attendance information is updated in Access ACS. For example, you mark attendance for classes and worship.

To verify and approve Attendance Marking change requests

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with Access ACS**, and click **Go** . The Upload to Access ACS window displays.
3. On the left-side column, click **Attendance Marking**. Before you apply change requests, you can review and edit them to make sure the changes are acceptable.
4. Click **Apply**.

Group Rosters Change Requests

Group Rosters change requests are created when group rosters are changed in Access ACS. For example, you add a new member to a group roster or drop a former member from a group roster.

To verify and approve Group Rosters change requests

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with Access ACS**, and click **Go** . The Upload to Access ACS window displays.
3. On the left-side column, click **Group Rosters**. Before you apply change requests, you can review and edit them to make sure the changes are acceptable.
4. Click **Apply**.

Connections Change Requests

Connections change requests are created when connections are changed in Access ACS. For example, you create a new Outreach Connection to follow up with new visitors.

To verify and approve Connections change requests

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with Access ACS**, and click **Go** . The Upload to Access ACS window displays.
3. On the left-side column, click **Connections**. Before you apply change requests, you can review and edit them to make sure the changes are acceptable.
4. Click **Apply**.

Pledge Change Requests

Organization Info Change Requests

Organization Info change requests are created when organization information is changed in Access ACS. For example, you update your organization's profile and contact information.

To verify and approve Organization Info change requests

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with Access ACS**, and click **Go** . The Upload to Access ACS window displays.
3. On the left-side column, click **Organization Info**. Before you apply change requests, you can review and edit them to make sure the changes are acceptable.
4. Click **Apply**.

Organization Staff Change Requests

Organization Staff change requests are created when organization staff information is changed in Access ACS. For example, you add a new staff member.

To verify and approve Organization Staff change requests

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with Access ACS**, and click **Go** . The Upload to Access ACS window displays.
3. On the left-side column, click **Organization Staff**. Before you apply change requests, you can review and edit them to make sure the changes are acceptable.
4. Click **Apply**.

Reject Change Requests

You can automatically send email notifications when you reject change requests. Access ACS sends the emails to the members who originally entered the change requests that you reject.

To reject a change request

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with Access ACS**, and click **Go** . The Upload to Access ACS window displays.
3. On the left-side column, click a change request category.
4. Beside the change request you want to reject, click **Delete** .
5. When the confirmation message displays, click **OK**.

View Logs

The View Logs grid is similar to the People Changes Log, but it provides more details. For example, you can view the old and new values for change requests.

Using Filters and Categories

The grid displays information across seven columns, and you can filter the grid by a specific category. If you need advanced filtering results, you can create a custom filter. You can also clear all change requests from the View Logs grid, and specify a particular type of change request.

1. In the View Logs grid, place your cursor over a column heading until you see a drop-down arrow.
2. Click the drop-down arrow, and select a category.

1. In the View Logs grid, place your cursor over a column heading until you see a drop-down arrow.
2. Click the drop-down arrow, and select **Custom**. The Custom Filter dialog box displays.
3. Enter your filter values, and click **OK**.

1. At the bottom of the View Logs grid, click **Clear Log**. The Clear Log dialog box displays.
2. Select the type of change request you want to clear from the log.
3. Select a date range, then click **Clear**.

Need to print the View Logs grid? No problem.

1. At the bottom of the View Logs grid, click **Print**. The Print Preview window displays.
2. Select your printing settings, and click **Print**.

Sync with DioOffice

If your parish uses ACS People and your diocese uses PDS DioOffice, you can upload ACS People records to your diocese using the DioOffice Sync option.

With the DioOffice Sync option:

- Upload records based on search results, or on record types and member statuses.
- Review the records that will be sent and the changes that have been made.

You must assign security rights to users who will upload these records.

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit** Users and click **Go** .
3. On the **Users** tab, select the ACS user whose security rights you want to edit, then click **Edit**.
4. In the Edit User window, click on the **Security** tab.
5. Expand **People** and select **Sync with DioOffice**.
6. Right-click on the field and select **All**.
7. Click **Apply**, then **OK**.

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Sync with DioOffice** and click **Go** .
3. Enter your **Church ID** and **Password**. Once you enter this information, you will not be prompted to enter it again, but you will have the option to edit it if necessary.
4. Enter the **Default Area Code**.
5. If you are uploading records based on your last search results, select **Use Last Search**. If you are uploading records based on record type and member status, select **Use Selection Below**. Select the record types you want to upload, and clear the **Include All** check box to select the member statuses you want to upload.
6. Click **Sync**. A list of the changes that will be sent to the diocese displays. To view the details of an item, select it and click on the **Details of the Current Item** tab.
7. Click **Sync**.

Advanced Exports

Advanced Export is an advanced version of the People Export you can use to export selected data from the **People** module. You can use this option to generate a customized export file in various file formats.

The Advanced Export option includes data selection options from the **People**, **Special Mailings**, **General Ledger**, and **Organizations** modules, depending on the modules your organization owns. A solid understanding of these modules, as well as an understanding of search and export functionality, is important when using Advanced Export. If you have never exported information from ACS using the People Export, you should familiarize yourself with that option and its features before performing an advanced export.

As with performing searches, the best way to learn how to perform more complex tasks is to experiment. Plan your desired output carefully before you create your export file. By considering the fields you need to export data from, the desired organization of the data, and the appropriate file format

for the export, you will save time completing an advanced export. Be sure that you are comfortable working in the software application to which you are exporting data.

While Advanced Exports enables you to export to many different software packages, ACS does not support these packages.

Creating a New Advanced Export

You can create new advanced exports to export specific data for use in other software programs.

For example, you can use Advanced Export to add Attendance Markings. First, create a Database Export. When selecting Included Data, include Personal and Class Rolls, and select the master group you want to mark attendance for.

You can also create an advanced export to print addresses directly on postcards by doing a search for those who you need addresses for, then export the names and address through a mail merge.

1. Under **Searches and Reports**, click **Searches**.
2. On the **Search Information** tab, click **Advanced Export**.
3. On the Advanced Export Menu, click **Create New Export**.
4. In the Select Export Type window, select one of the following:
 - **File Export** - Select to create a single file containing selected export information. If you are unsure of which type of export you want to perform, select **File Export**. There is a limit of 254 fields in the File Export.
 - **Database Export** - Select to create multiple files that are linked by common fields.
5. Click **OK**. The ACS Data Export Designer displays.
6. In the **Export Title** field, enter a title for the export.
7. **Optional:** To enter a detailed description of the export, click **Description**.
8. Select the desired options from the **Groups**, **Fields**, and **Format** tabs (if you are creating a Database Export, the tabs available are **Groups**, **Included Data**, and **Format**). Use the **Back** and **Next** buttons to navigate the tabs.



Tip

On the Included Data tab, you can select **CB Gifts** to include a column for memorials in the export.

9. Do one of the following:
 - To save the export and close the ACS Data Export Designer, click **Save & Close**
 - To export the information, click **Run Export**

Copying an Advanced Export to a New Name

Use Copy to New Name on the Advanced Export menu to copy an export to a new file name. This is helpful if you want to create a new export that uses similar settings and options as one you've created already. You can copy the export, save it with a new name, and make your changes.



Note

If you select a file name that is already in use, the system prompts you to enter a new name.

1. Under **Searches and Reports**, click **Searches**.

2. On the **Search Information** tab, click **Advanced Export**.
3. On the Advanced Export menu, select the export file you want to copy to a new name.
4. Click **Copy to New Name**.
5. Enter the new name for the export and click **OK**.

Running an Advanced Export

After you create a new export and save it, it displays on the Advanced Export menu. Use the Run Export option on the Advanced Export menu to execute a saved export.

1. Under **Searches and Reports**, click **Searches**.
2. In the Searches window, click **Advanced Export**.
3. On the Advanced Export Menu, select the export to run, then click **Run Export**.
4. A message displays asking if you want to limit the number of records exported for testing purposes. Do one of the following:
 - Click **OK** to export all records
 - Enter the number of records you want to limit the export to for testing purposes and click **OK**.
5. When the export is complete, a confirmation message displays. Click **OK**.

Viewing and Editing Advanced Export Properties

Use the Properties option on the Advanced Export menu to view and edit the properties of a selected export.

1. Under **Searches and Reports**, click **Searches**.
2. On the **Search Information** tab, click **Advanced Export**.
3. On the **Advanced Export** menu, select the export file you want to access properties for, then click **Properties**.
4. View and/or edit the export properties from the **Groups**, **Fields**, and **Format** tabs (if you are creating a Database Export, the tabs available are **Groups**, **Included Data**, and **Format**).
5. Click **Save & Close** to save the export and close the ACS Data Export Designer.

Deleting an Advanced Export

If you no longer need an export, you can delete it.

1. Under **Searches and Reports**, click **Searches**.
2. On the **Search Information** tab, click **Advanced Export**.
3. On the **Advanced Export** menu, select the export file to delete, then click **Delete Export**.
4. When the confirmation message displays, click **OK**.

Working with the ACS Data Export Designer

Use the ACS Data Export Designer to select properties for an Advanced Export. The Export Designer contains three tabs, depending on the type of export you are performing (File or Database).

1. Under **Searches and Reports**, click **Searches**.
2. On the **Search Information** tab, click **Advanced Export**.
3. To create a new export, on the Advanced Export Menu, click **Create New Export**.
4. To edit an existing export, select the export you want to edit, then click **Properties**.
5. Select the appropriate export options. When finished, click **Save & Close** to return to the Advanced Export Menu, or click **Run Export** to run the export.

If you are performing a File Export, the following tabs display:

- **Groups** — Select to export People, Special Mailings Groups, Reservations Activity Rosters, General Ledger Accounts, or Organizations data, depending on the ACS modules you own. The Groups selection options differ depending on your selection.
- **Fields** — Select and arrange the ACS Fields to export. Take some time to familiarize yourself with the available fields and options for the field types.
- **Format** — Select the file format you want to export your data in.

If you are performing a Database Export, the following tabs display:

- **Groups** — Select to export People, Special Mailings Groups, Reservations Activity Rosters, General Ledger Accounts, or Organizations data, depending on the ACS modules you own. The Groups selection options differ depending on your selection.
- **Included Data** — Select the database tables you want to include in the export.
- **Format** — Select the file format you want to export your data in.

The Groups Tab in Advanced Exports

Use the Groups tab to choose to export either People, Special Mailings Groups, Reservations Activity Rosters, General Ledger Accounts, or Organizations data, depending on the ACS modules you own. The Groups selection options differ depending on your selection.

1. Under **Searches and Reports**, click **Searches**.
2. On the **Search Information** tab, click **Advanced Export**.
3. To create a new export, on the Advanced Export Menu, click **Create New Export**.
4. To edit an existing export, select the export you want to edit, then click **Properties**.
5. Click on the **Groups** tab, then select the appropriate export options.
6. When finished, click **Save & Close** to return to the Advanced Export Menu, or click **Run Export** to run the export.

The Fields Tab in Advanced Exports

Use the Fields tab to select and arrange the ACS Fields to include in the export. The fields available depend on your Groups tab selections. Take some time to familiarize yourself with the available fields and options for the field types.

The following information may help in selecting options from ACS Fields:

- Be sure to view all the available fields in the ACS Fields area. There are multiple layers of fields, so it is helpful to take a few moments to familiarize yourself with the setup.
- Primary fields are fields which serve to identify individual members of the group. These are designated by a gold icon in the ACS Fields list.
- To select fields from the ACS Fields list, you can double-click the desired field or drag and drop it to the Selected Fields tab.
- The Primary Organizations folder found under the Personal folder contains Primary Affiliation fields.

1. Under **Searches and Reports**, click **Searches**.
2. On the **Search Information** tab, click **Advanced Exports**.
3. To create a new export, on the Advanced Export Menu, click **Create New Export**.
4. To edit an existing export, select the export you want to edit, then click **Properties**.
5. Click on the **Fields** tab, then select the appropriate export options.
6. When finished, click **Save & Close** to return to the Advanced Export Menu, or click **Run Export** to run the export.

The Included Data Tab in Advanced Exports

Use the Included Data tab to select the database tables you want to include in the advanced export. This tab is available when you are performing a Database Export.

1. Under **Searches and Reports**, click **Searches**.
2. On the **Search Information** tab, click **Advanced Export**.
3. To create a new export, on the Advanced Export Menu, click **Create New Export**.
4. To edit an existing export, select the export you want to edit, then click **Properties**.
5. Click on the **Included Data** tab, then select the appropriate export options.
6. When finished, click **Save & Close** to return to the Advanced Export Menu, or click **Run Export** to run the export.

The Format Tab in Advanced Exports

Use the Format tab to select the file format you want to export your data in.

The file formats you can export your ACS data as using the Advanced Export option are, ACS Report Designer, Microsoft® Word, Mail Merge, Microsoft® Excel®, Microsoft® Access®, Microsoft® Outlook®, Microsoft® Foxpro, Paradox for Windows, dBase, ASCII Fixed-Length Text File, Comma Separated Values, and Tab Separated Values.

ACS OnDemand

Files exported within the OnDemand environment will open in [OpenOffice](#) instead of Microsoft Office.

1. Under **Searches and Reports**, click **Searches**.
2. On the **Search Information** tab, click **Advanced Export**.
3. To create a new export, on the Advanced Export Menu, click **Create New Export**.
4. To edit an existing export, select the export you want to edit, then click **Properties**.
5. Click on the **Format** tab.
6. In the drop-down list, select the appropriate **File Format**. For some file formats, the **Filename** option displays. Select **Filename** to select a location to save the file, then click **OK**.

Note

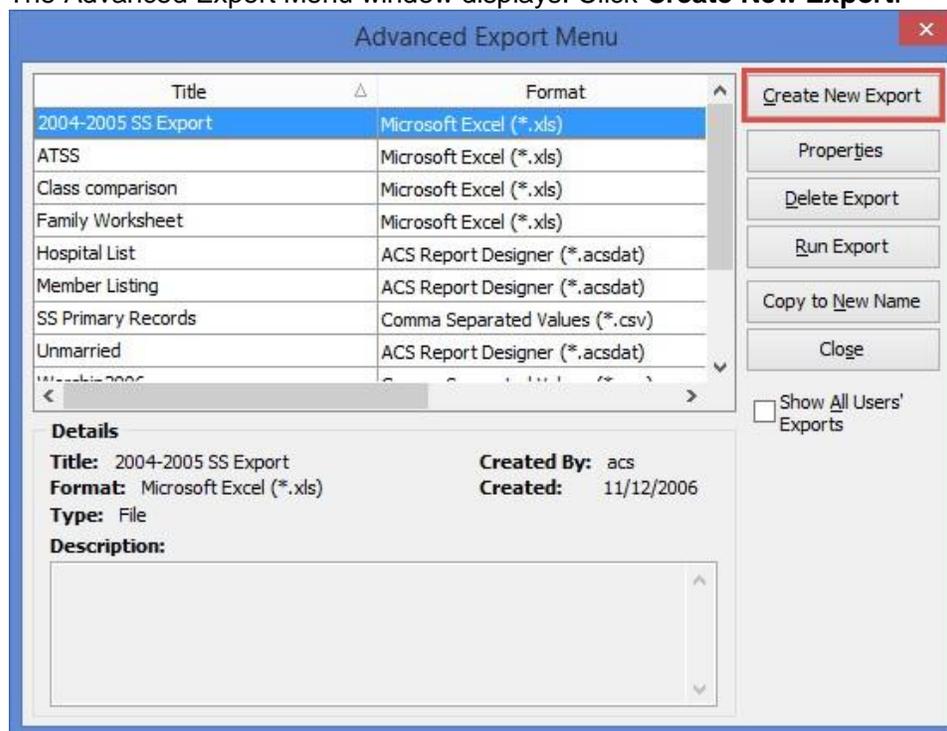
OnDemand clients can save files to the S Drive and [transfer them to the local hard drive](#).

7. When finished, click **Save & Close** to return to the Advanced Export Menu, or click **Run Export** to run the export.

Creating an ACS data export file for Surpass

Surpass is a third-party library automation software. You can create an ACS data export file for Surpass.

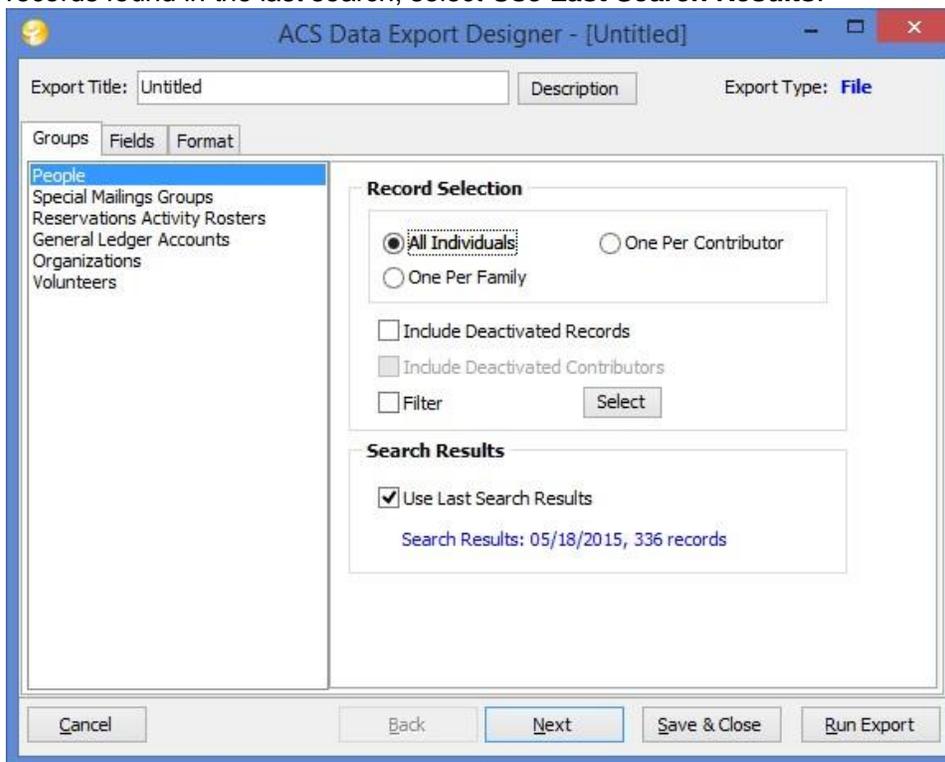
1. Perform a search for the records you want to export to Surpass.
2. In the Searches window, click **Advanced Exports**.
3. The Advanced Export Menu window displays. Click **Create New Export**.



4. The Select Export Type dialog box displays. Select **File Export**, and click **OK**.



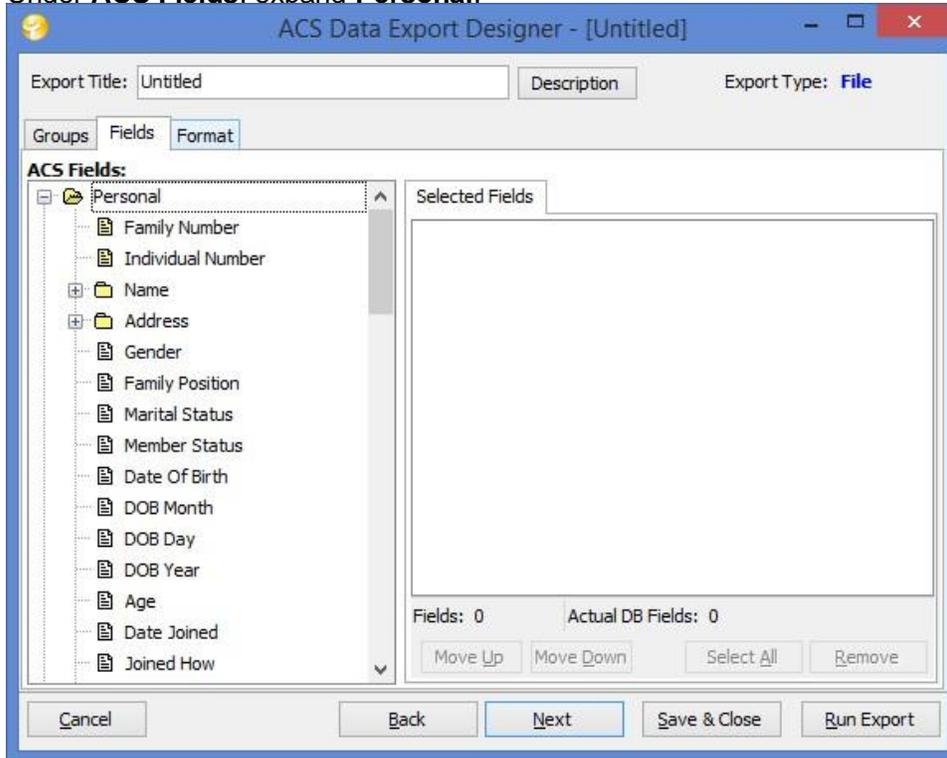
5. The ACS Data Export Designer window displays. On the **Groups** tab, select **People**. To use only records found in the last search, select **Use Last Search Results**.



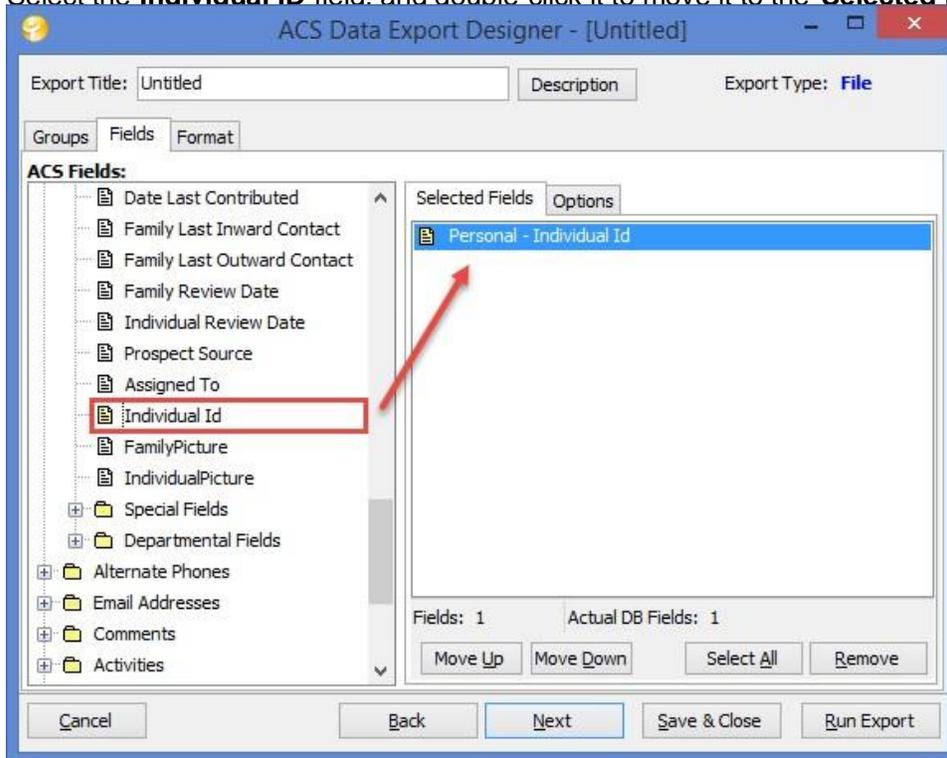
6. In the ACS Data Export Designer window, click the **Fields** tab.

 The order of field selection is critical. Select the fields in the order as listed in the following steps. Do not select any other fields, or the import process will fail.

7. Under **ACS Fields**, expand **Personal**.



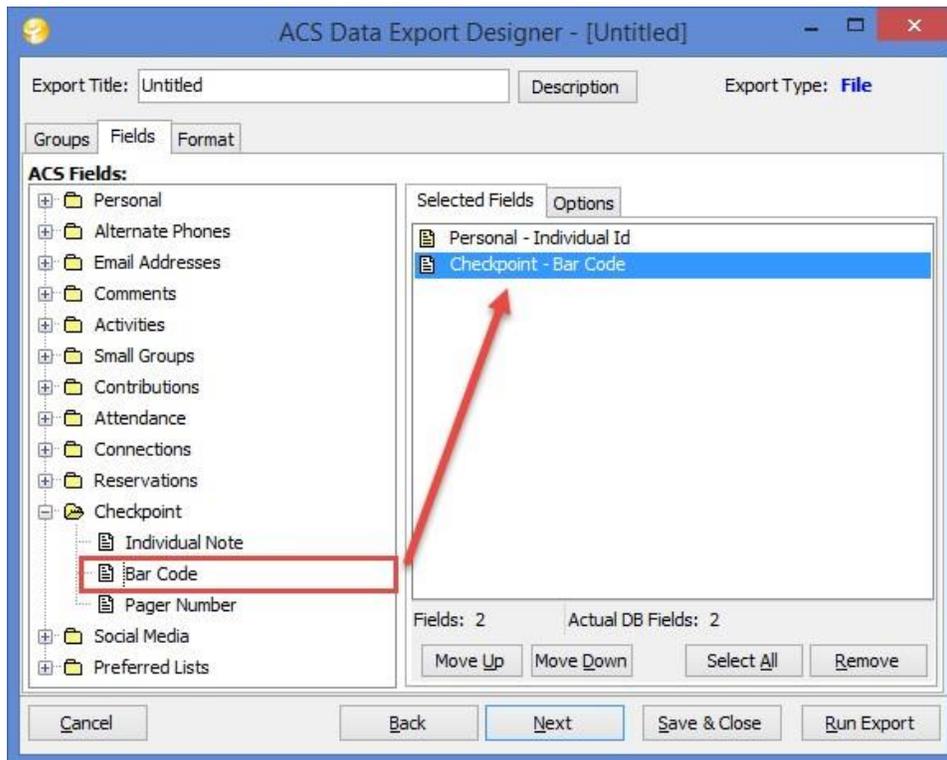
8. Select the **Individual ID** field, and double-click it to move it to the **Selected Fields** tab on the right.



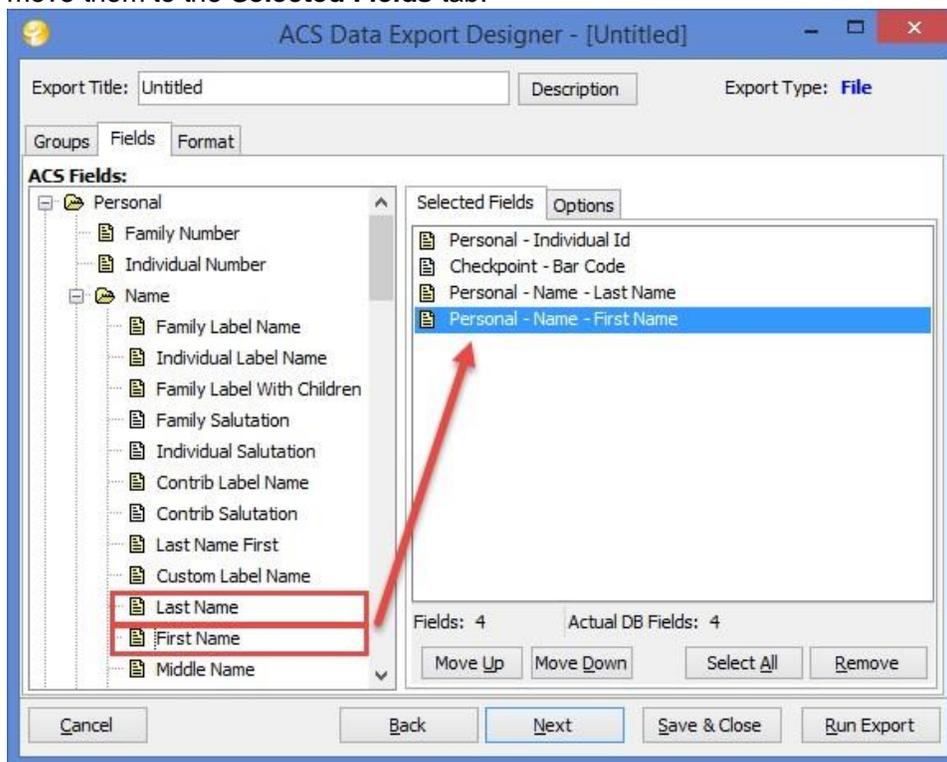
9. Expand **Checkpoint**. Select the **Bar Code** field, and double-click it to move it to the **Selected Fields** tab.



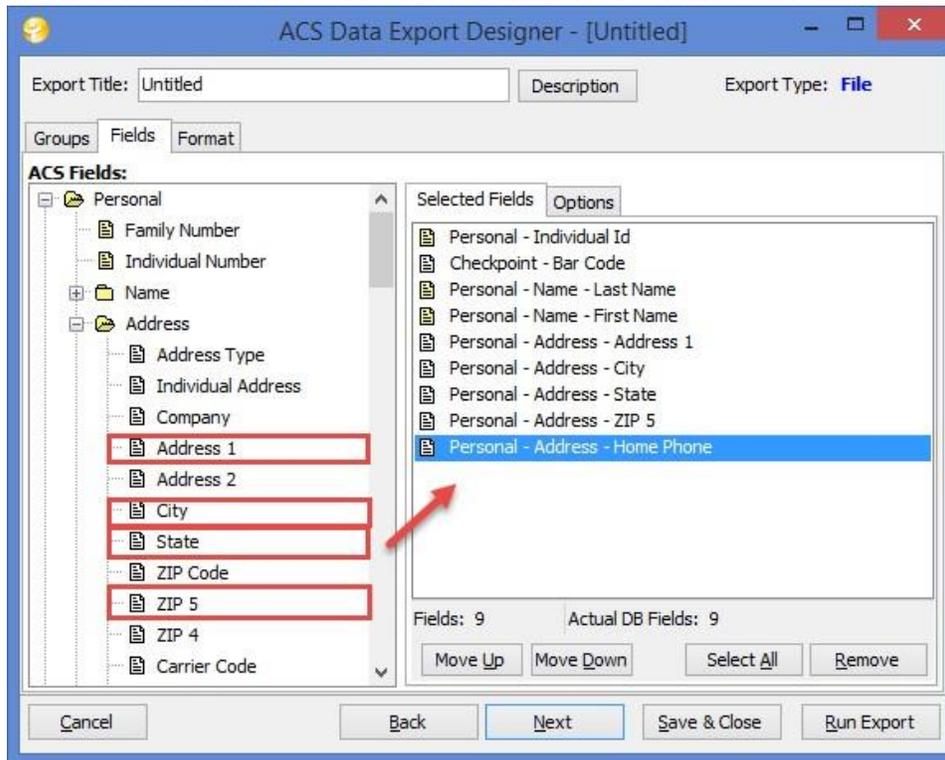
If you do not own Checkpoint, skip the above step. This field is not available.



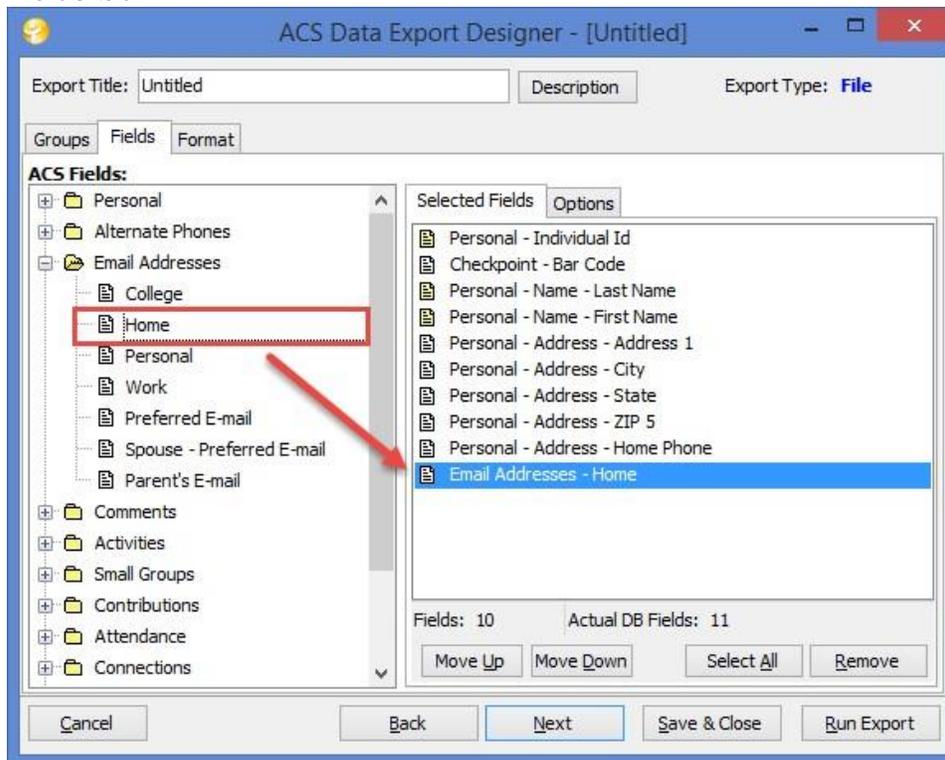
10. Expand **Personal > Name**. Select the **Last Name** and **First Name** fields, and double-click them to move them to the **Selected Fields** tab.



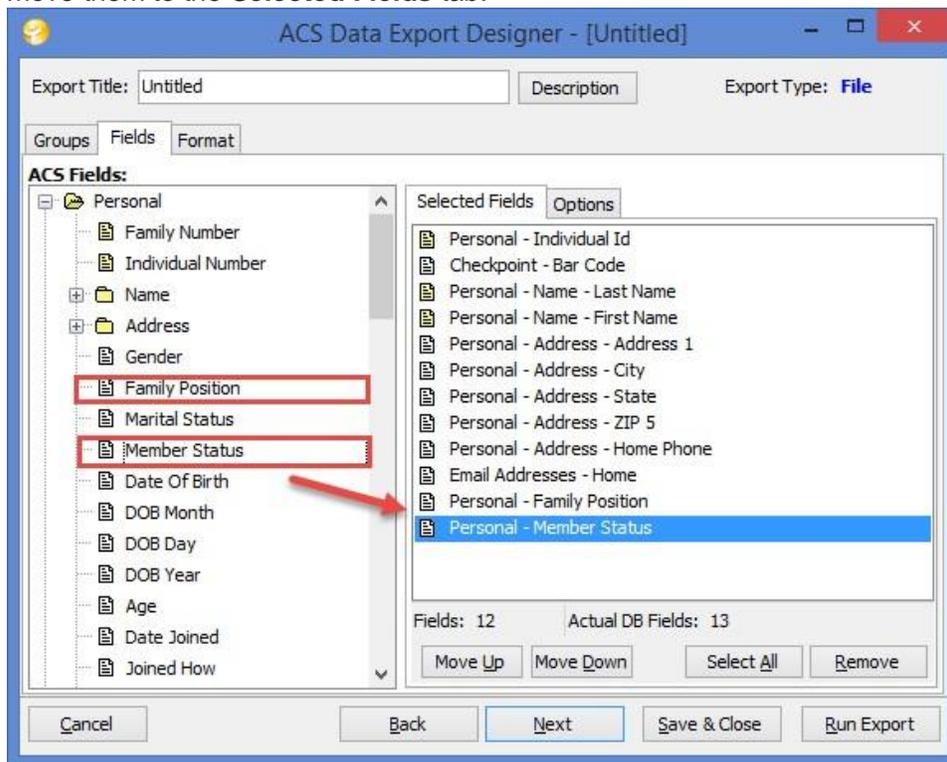
11. Expand **Personal > Address**. Select the **Address 1**, **City**, **State**, **ZIP 5**, and **Home Phone** fields, and double-click them to move them to the **Selected Fields** tab.



12. Expand **Email Addresses**. Select the **Home** field, and double-click it to move it to the **Selected Fields** tab.

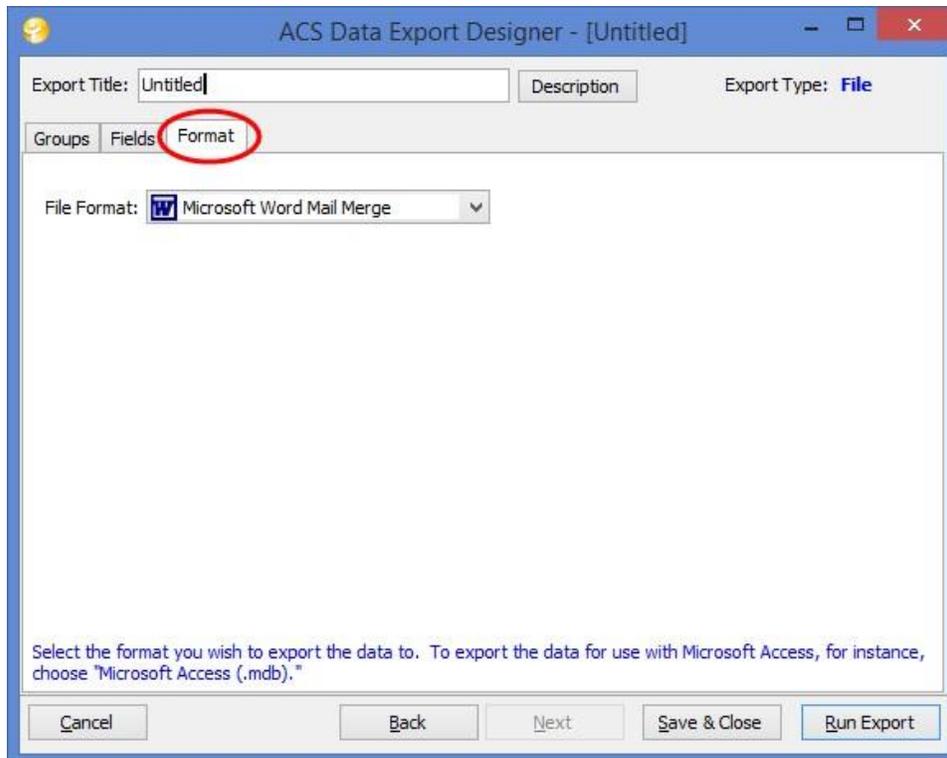


13. Expand **Personal**. Select the **Family Position** and **Member Status** fields, and double-click them to move them to the **Selected Fields** tab.

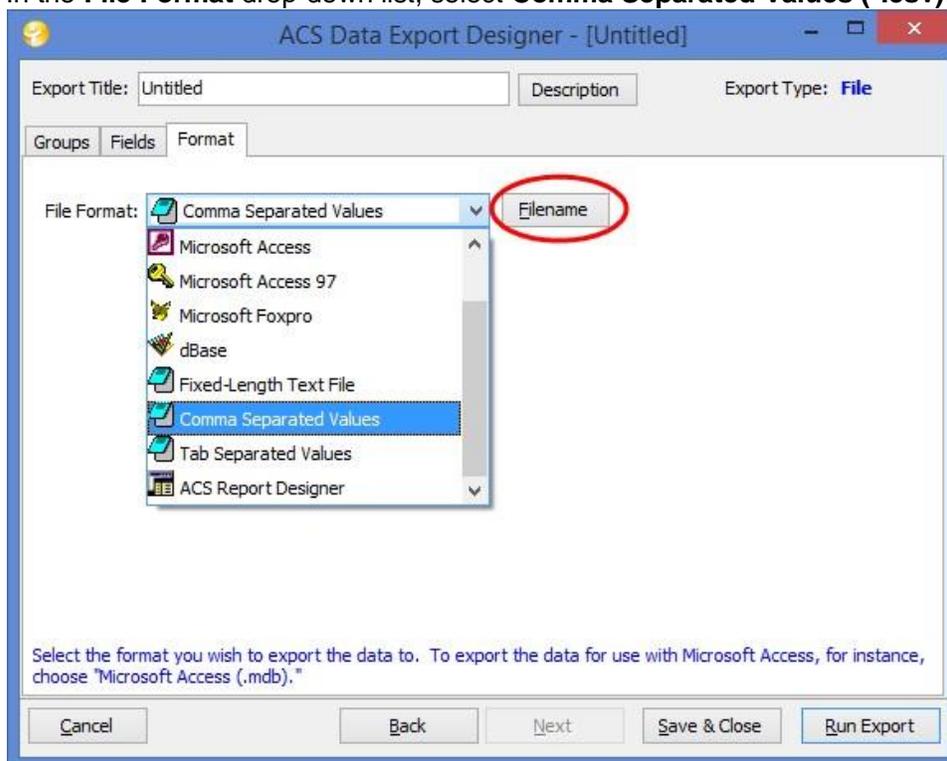


After you've selected fields to export, it's time to create the export file.

1. In the ACS Data Export Designer window, click the **Format** tab.

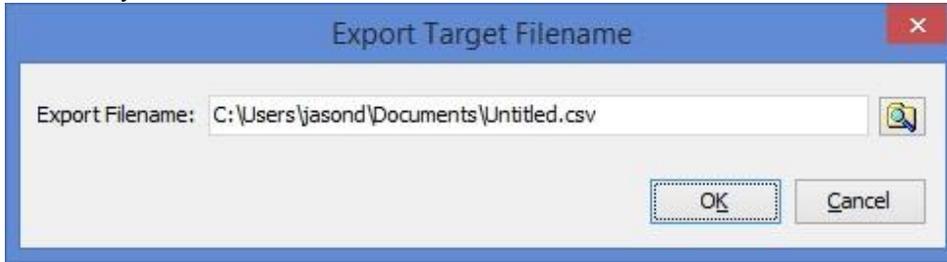


2. In the **File Format** drop-down list, select **Comma Separated Values (*.csv)**.



3. Click **Filename**, The Export Target Filename dialog box displays.

4. Click the yellow folder icon



to select the location to save your export file. 5. Enter the file name

ACStoSurpass.

6. Click **Save**, and **OK**.
7. In the ACS Data Export Designer window, click **Run Export**. The Refresh Export dialog box displays.



8. Click **OK**.
9. When the confirmation message displays that the export is complete, click **OK**.
10. In the ACS Data Export Designer window, click **Save & Close**. The Save Export As dialog box displays.



11. In the **Title** field, enter **ACStoSurpass Export** and click **OK**.

Now that you've created your export file, you can edit it for Surpass. You must complete the following procedure before you can import your patrons into Surpass.

The editing procedures are different if you own Checkpoint. If so, you must change the **CPBarCode** column data from a percentage to a number.

1. Open the **ACStoSurpass.csv** file in Microsoft® Excel.

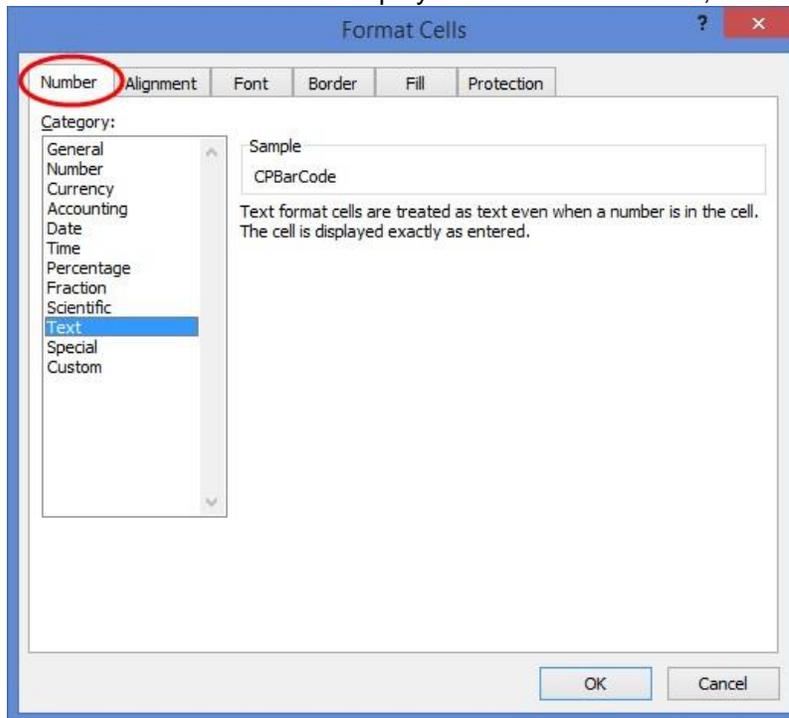
- Click the cell above the **HomeEmailUnlisted** column heading to select the entire column, and press the **DELETE** key to delete the column.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	IndividualId	CPBarCode	LastName	FirstName	Address1	City	State	ZIP5	HomePhone	HomeEmailAddr	HomeEmailUnlisted	FamilyPosition	MemberStatus
2	1	1	Thomas	Christopher								Head	Active Member
3	3	3	Abel	Carl	Hillhaven	Florence	SC	29501	843-555-8276	carikurtabel@ac	FALSE	Head	Active Member
4	4	4	Wilson	Bronson	Po Box 77	Florence	SC	29503	843-555-7988			Head	Active Member
5	5	5	Wilson	Anna	Po Box 77	Florence	SC	29503	843-555-7988	annawilson@ear	TRUE	Spouse	Active Member
6	6	6	Wilson	Tammy	Po Box 77	Florence	SC	29503	843-555-7988			Child	Active Member
7	7	7	Wilson	Charles	Po Box 77	Florence	SC	29503	843-555-7988			Child	Active Member

- Click the cell name above the **CPBarCode** column heading to select the entire column (Column B).

	A	B	C	D
1	IndividualId	CPBarCode	LastName	FirstName
2	3	3%	Abel	Carl
3	17	17%	Campbell	Leonard
4	19	19%	Waller	Barbara
5	20	20%	Vanderbil	George
6	22	22%	Smartt	Thomas
7	23	23%	Thompson	Andrew
8	31	31%	Morris	Paul

- Select to format the cells.
- The Format Cells window displays. On the **Number** tab, select **Text**, and click **OK**.



- The **CPBarCode** column data will display as a percentage.

	A	B	C	D
1	IndividualId	CPBarCode	LastName	FirstName
2	3	0.03	Abel	Carl
3	17	0.17	Campbell	Leonard
4	19	0.19	Waller	Barbara
5	20	0.2	Vanderbil	George
6	22	0.22	Smartt	Thomas
7	23	0.23	Thompson	Andrew
8	31	0.31	Morris	Paul

7. Click the cell above the **LastName** column heading to select the entire column.

	A	B	C	D
1	IndividualId	CPBarCode	LastName	FirstName
2	3	0.03	Abel	Carl
3	17	0.17	Campbell	Leonard
4	19	0.19	Waller	Barbara
5	20	0.2	Vanderbil	George
6	22	0.22	Smartt	Thomas
7	23	0.23	Thompson	Andrew
8	31	0.31	Morris	Paul

8. Insert a new column. A new column of blank cells displays.

	A	B	C	D
1	IndividualId	CPBarCode		LastName
2	3	0.03		Abel
3	17	0.17		Campbell
4	19	0.19		Waller
5	20	0.2		Vanderbilt
6	22	0.22		Smartt
7	23	0.23		Thompson
8	31	0.31		Morris

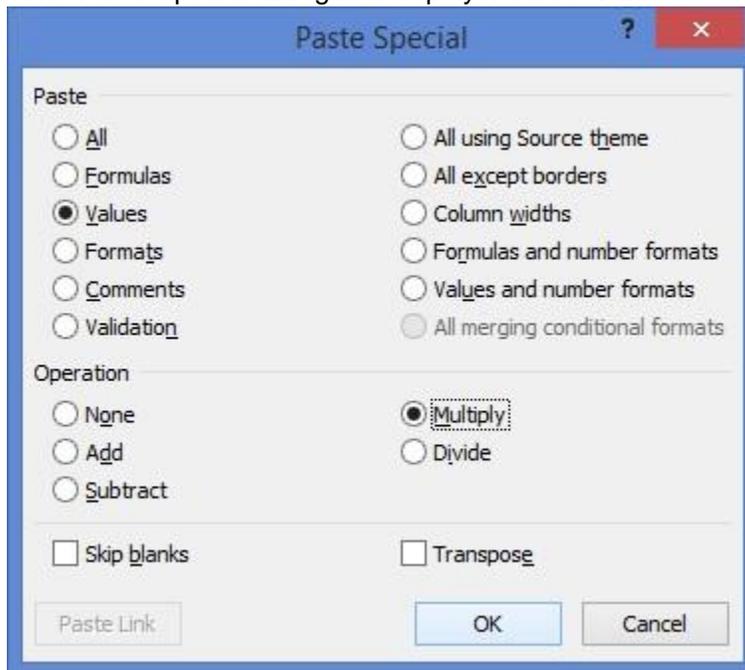
9. Click in any cell of the blank column, and enter **100**.

	A	B	C	D
1	IndividualId	CPBarCode		LastName
2	3	0.03	100	Abel
3	17	0.17		Campbell
4	19	0.19		Waller
5	20	0.2		Vanderbilt
6	22	0.22		Smartt
7	23	0.23		Thompson
8	31	0.31		Morris

10. Click in the cell below the one containing 100. Then, click back in the cell containing 100. Rightclick, and select **Copy**.
11. Click the cell above the **CPBarCode** column heading to select the entire column.

	A	B	C	D
1	IndividualId	CPBarCode		LastName
2	3	0.03	100	Abel
3	17	0.17		Campbell
4	19	0.19		Waller
5	20	0.2		Vanderbilt
6	22	0.22		Smartt
7	23	0.23		Thompson
8	31	0.31		Morris

12. Select **Paste Special**.
13. The Paste Special dialog box displays. Select **Values** and **Multiply**. Click **OK**.



14. The **CPBarCode** column changes to whole numbers.

	A	B	C
1	IndividualId	CPBarCode	
2	3	3	100
3	17	17	
4	19	19	
5	20	20	
6	22	22	
7	23	23	
8	31	31	

15. Click the cell above the column heading cell in the column that contains the 100 entry.

	A	B	C	D
1	IndividualId	CPBarCode		LastName
2		3 3	100	Abel
3		17 17		Campbell
4		19 19		Waller
5		20 20		Vanderbilt
6		22 22		Smartt
7		23 23		Thompson
8		31 31		Morris

16. Right-click and select **Delete**.
17. Save the file. Remember the location of the saved file.

1. Open the **ACStoSurpass.csv** file in Microsoft® Excel.
2. Click the cell above the **HomeEmailUnlisted** column heading to select the entire column, and press the **DELETE** key to delete the column.

	A	B	C	D	E	F	G	H	I	J	K	L
1	IndividualId	LastName	FirstName	Address1	City	State	ZIP5	HomePhone	HomeEmailAddr	HomeEmailUnlisted	FamilyPosition	MemberStatus
2		3 Abel	Carl	Hillhaven	Florence	SC	29501	843-555-8276	carlkurtabel@acs.com	FALSE	Head	Active Member
3		4 Campbell	Leonard	108 N Vine	Florence	SC	29506	843-555-8321	sbines@acs.com	FALSE	Head	Active Member
4		19 Waller	Barbara	151 Park S	Darlington	SC	29532	843-555-5124			Head	Active Member
5		20 Vanderbilt	George	381 Park A	Florence	SC	29501	843-555-2145			Head	Active Member
6		22 Smartt	Thomas	3127 Bann	Florence	SC	29505	843-555-7412			Head	Active Member
7		23 Thompson	Andrew	843 Lynwc	Florence	SC	29501	843-555-5970			Head	Active Member

3. Insert a new column. To do this, click the cell above the **IndividualId** column heading (column A).

	A	B	C	D
1	IndividualId	LastName	FirstName	Address1
2		3 Abel	Carl	Hillhaven
3		4 Campbell	Leonard	108 N Vine
4		19 Waller	Barbara	151 Park S
5		20 Vanderbilt	George	381 Park A

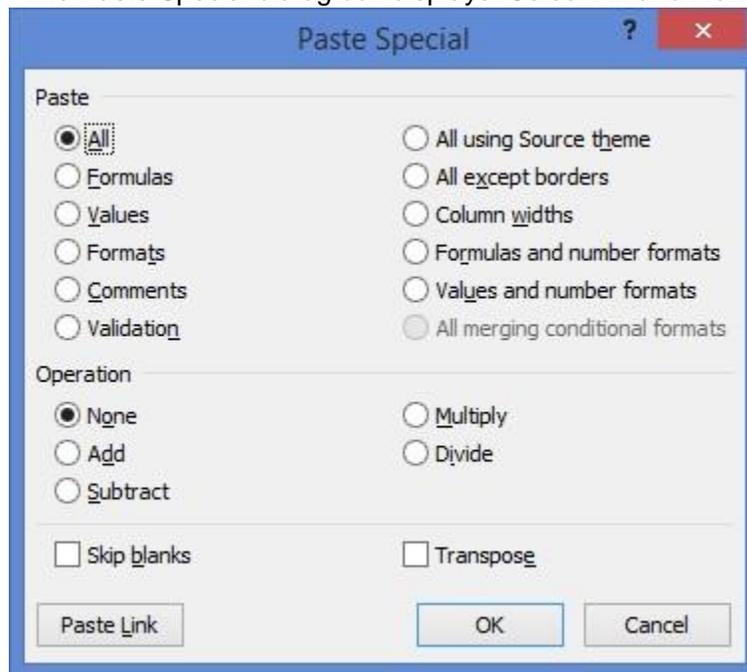
4. Select **Insert Cells**. A new column A is created.
5. Click the cell above the **IndividualId** column heading (column B). Right-click, and select **Copy**.

	A	B	C	D
1		IndividualId	LastName	FirstName
2		3 Abel	Carl	
3		4 Campbell	Leonard	
4		19 Waller	Barbara	
5		20 Vanderbilt	George	

6. Click the main column A cell.

	A	B	C	D
1		IndividualId	LastName	FirstName
2		3 Abel	Carl	
3		4 Campbell	Leonard	
4		19 Waller	Barbara	
5		20 Vanderbilt	George	

7. Select **Paste Special**.
8. The Paste Special dialog box displays. Select **All** and **None**. Click **OK**.



9. Change the column B heading from **Individualid** to **CPBarCode**.
10. Save the file. Remember the location of the saved file.

After you've created and edited your export file, you must download a program called Pimport. This program and template let you import your patron records into Surpass.

1. In Surpass Central, click **Setup**, and **Patrons**.
 2. On the **Patrons Types & Limits** tab, change the following descriptions. The other patron types are not used when importing from ACS.
 - For code 1, change the description field to **Head**.
 - For code 2, change the description field to **Spouse**.
 - For code 3, change the description field to **Child**.
 3. You must set up one custom patron field. In the Setup Patrons window, click the **Custom Patron Fields** tab.
 4. Change the **Notes1** description field to **Member Status**.
 5. Close Surpass Central.
 6. Download Pimport version 5.60 from the Surpass website. Enter the user name and password assigned to you by Surpass.
 7. Install Pimport to your Surpass program folder.
 8. Copy the **pimport.def** template file into the Surpass program folder.
-
1. On your Windows Start menu, browse to **Surpass > Pimport Patron Import**.
 2. Enter the appropriate user name and password.
 3. In the Open File window, select the **pimport.def** file from your Surpass program folder.

4. Click **Open** or **Next Step**. The Preview window displays.
5. After previewing your data, on the **Import** tab, click **Next Step**. If prompted to perform a Quick Backup, exit Pimport, perform the backup, and log back in. If you are not prompted, the import starts automatically.
6. When the import is complete, click **Yes** to close the application.

If you have any additional questions or need further assistance with Pimport or with any other Surpassrelated issue, contact Surpass Support:

- **By Phone:** 888-313-7678 (toll-free inside the US) or 407-909-1696 (outside the US)
- **By Email:** help@surpasssupport.com
- **On the Web:** www.surpasssupport.com

DataShare

DataShare lets you synchronize and share people data such as names, addresses, and other information. This improves the accuracy of your church and organizational databases, creates a greater resource for ministry, saves you time by not having to manually update records, and allows you to send more accurate mailings.

Who Uses DataShare

Using ACS People, DataShare helps Catholic and Episcopal dioceses to share information about their parishioners within the diocesan structure.



Note

DataShare is only available for purchase by a diocese. Churches and parishes under a diocese that have purchased the software can request to connect to their diocese via DataShare.



Installing DataShare

For the best user experience, we recommend that you install or upgrade to the latest version of ACS People. To determine if you are using the most recent version in the program, go to **Online Resources**, then select **Check for Updates**. Update the current version .

Back Up Your Data

1. Open the **ACS Backup** utility.
 - a.) **Windows 7:** On your Windows desktop, click the Start button  in the lower-left corner of the screen. The Start menu displays. Click **All Programs > ACS Technologies > ACS Tools > ACS Backup**.
 - b.) **Windows 8.1:** On the Windows desktop, click the Start button  in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the ACS Technologies section, click **ACS Backup**.
 - c.) **Windows 10:** On the Windows desktop, click the Start button  in the lower-left corner of the screen. The Start menu displays. Scroll to the ACS Technologies section, and click **ACS Backup**.

Link

2. Enter your user name and password and click **OK**.
3. Under **Data Options**, select the backup that you want to perform.
4. Under **Additional Options**, make the appropriate selections.
5. Verify the backup destination. If necessary, click **Lookup**  to select a different location.

Important

- ★ Do not back up to the WINACS or ACSNET folders.
- ★ ACS OnDemand users must back up files to the **S:\ACS_Backups** folder.

6. If you are backing up to a zip disk or a flash drive, insert the disk or drive.
7. Click **Backup**.
8. If you selected to change the filename, enter a filename and click **OK**.

Optional: When the backup is finished, click **Print History** to view or print the Backup/Restore Log report.

Installing the Add-On Module

When you purchase an add-on module, a new registration key for your ACS software is provided to you. Enter the registration key during the installation of your new modules.

1. On the Windows taskbar, click **Start**.
2. Click **Programs > ACS Technologies > ACS Tools > Add New Modules**.
3. Enter the client registration information, then follow the on-screen instructions.

1. On the Windows desktop, click the Start button  in the lower-left corner of the screen. The Start screen displays.
2. Click the arrow button . The Apps view displays.
3. Click **Add New Modules**.
4. Follow the instructions as they display. When prompted to enter your **Registration Information**, enter the **Registration Key** you received when you purchased the new modules.



For those using 60-Day Evaluation versions

- If you enter data that makes your live data unusable, ACS Data Services can clean up your data for a fee.
- If you want to use a demo dataset, contact ACS Customer Support at 1-800-669-2509 for assistance.

Set User Rights

Before using DataShare, all connected sites need to set up security rights in Add/Edit Users. The security options you select depend on the data you will send and receive.

For example, if your church or organization needs to send records to a denominational office, organization, or diocese, you need access to **Send Changes to DataShare**. If the denominational office or diocese changes records that also need to be updated in your database, you need access to **Get Changes from DataShare**.

If you do not want volunteers to send and receive updated information in DataShare, select **None**. Users who do not have access to DataShare still see updated records after changes are received.

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. Select **Add/Edit Users** and click **Go** .
3. On the **Users** tab, select the user whose DataShare security options you want to grant or restrict, then click **Edit**.
4. In the Edit User window, on the **Security** tab, expand **DataShare**.
5. If granting access to DataShare, under **Access**, select **All** for **Get Changes from DataShare** or **Send Changes to DataShare**.
6. If restricting access, select **None** for **Get Changes from DataShare** or **Send Changes to DataShare**.
7. Click **OK**.

Granting and Restricting DataShare Access

Before using DataShare, all connected sites need to set up security rights in Add/Edit Users. The security options you select depend on the data you will send and receive.

For example, if your church or organization needs to send records to a denominational office, organization, or diocese, you need access to **Send Changes to DataShare**. If the denominational office or diocese changes records that also need to be updated in your database, you need access to **Get Changes from DataShare**.

If you do not want volunteers to send and receive updated information in DataShare, select **None**. Users who do not have access to DataShare still see updated records after changes are received.

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. Select **Add/Edit Users** and click **Go** .
3. On the **Users** tab, select the user whose DataShare security options you want to grant or restrict, then click **Edit**.
4. In the Edit User window, on the **Security** tab, expand **DataShare**.
5. If granting access to DataShare, under **Access**, select **All** for **Get Changes from DataShare** or **Send Changes to DataShare**.
6. If restricting access, select **None** for **Get Changes from DataShare** or **Send Changes to DataShare**.
7. Click **OK**.

Getting DataShare Changes From Connected Sites

Getting changes from connected sites allows you to upload new records to your database, change existing records that were modified in the connected site's database, and deletes records that were deleted from the connected site's database. DataShare sends information from the connected site's database to your database and the receiving site gets changes from the connected sites.

To know what information has changed, you'll receive updated information about:

- each individual's Profile tab in View/Edit Individual any new individuals who has been added to the connected site's database
- any individual who was deleted from the connected site's database

When the connected site sends their changes to DataShare for your database to receive them, the changes are not automatically applied to your database. You can review new, updated, and deleted individuals, then decide which ones to accept, reject, postpone, or ignore forever.

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Get Changes from DataShare** and click **Go** .
3. In the DataShare - Get Changes window, click **Next** .
4. Under **Download Options**, select the site you want to download changes from in the drop-down list. To download changes from every site, select **All connected sites**.

5. Click **Connect**. Once DataShare connects and receives changes, the number of new, updated, and deleted individuals displays under **Summary**.
6. If any fields need to be mapped, click on the field to select a mapping.
7. Click **Next** .
8. If this is your first time getting data from a church or organization, right-click on the site's name to map it to an existing record in ACS Organizations or to set it to Unaffiliated. You can also right-click and select **Don't map this site** to skip this process.
9. New individuals in the connected site's database display. At the top of the window, right-click on the connected site's name and select the applicable option:
 - **Change Status** - Select to change the status for all of the records from the connected site. For example, if you select **Change Status**, then select **Accept**, DataShare marks all records as accepted.
 - **Scroll To** - Select this option to scroll between connected sites or new families to be added to your database.
 - **Filter** - Select **Toggle Postpone Filter** to hide postponed records.
 - **Show Search Menu** - Select to display a search field at the top of the window so you can search for an individual. This is helpful if you want to ensure that an individual or family's record is included.
 - **Select Group** - Choose this option to select every record for the connected site. This is helpful if you want to accept all new individuals, because it allows you to mark every record as accepted.
 - **Auto Match Selected** - Select to automatically match the selected individuals to records already in your database. This is helpful because it prevents duplicate records from being created if a new individual already has a record in ACS. To auto match all records from the connected site, choose **Select Group**. You'll need to select the group and Auto Match Selected for each connected site.
 - **Manual Match Selected** — Select this option to manually match records.
 - **Clear Matching** — Select this option to un-match records.
 - **Visual Compare** — This option is available for matched records. Select this option to compare an individual's information from your database with the information from the connected site's database.



Tip

You can exit the Visual Compare window by pressing one of three keys: ESCAPE, ENTER, or the SPACE BAR.

- **Change Organization Mapping** - Select to map the connected site to an organization in ACS Organizations. When selected, individuals are affiliated with this organization after you upload records.
 - **Don't Map this Site** - Select to import individual records without setting an affiliated organization.
10. Select each individual's record, then click the appropriate button or press the applicable key. As you select each individual, his or her name, address, and status (Accepted, Rejected, Postponed, or Ignored Forever) displays.
 - **Accept (Hot Key A)** - Adds the new individual to your database.
 - **Reject (Hot Key S)** - Does not add the individual to your database.
 - **Postpone (Hot Key D)** - Does not add the individual to your database. The new individual's record continues to display when you get changes from DataShare, unless you accept, reject, or ignore it forever.
 - **Ignore Forever (Hot Key F)** - Does not add the individual to your database. Any future changes to this individual's record will not be sent to your site. For example, if the connected site has an individual record for "Loose Change" where they record loose change contributions, you could select this option to avoid being prompted to add this record each time you get changes. With this option, a blue link will display at the bottom of the window below the Summary section. Click the blue link to view a list of all the records you have chosen to ignore.

 **Note**

To select all records, right-click on the connected site's name, then click **Select Group**.

11. Click **Next** .

Mapping Fields in DataShare

Since every database's setup differs, you may need to map fields in your database when you get changes from connected sites.

Examples

- A connected site's database may contain individuals with the Member Status of **Other**, but your database doesn't have that Member Status. When you map the field, you can set those individuals' members statuses to change to another member status that is already defined in your database.
- You may track an organization's address using an address type of **Org**, but a connected site you get changes from may track organization addresses using the address type **Organization**. Once you map this field, when you receive an **Org** address, the address is listed as an **Organization** address in your database.

Fields are saved once you map them, but you can view and edit saved mappings.

1. Under Advanced Tools, click the **Admin Utilities** tab.
 2. In the drop-down list, select **Get Changes from DataShare** and click **Go** .
 3. In the DataShare - Get Changes window, click **Next** to establish a connection.
 4. Under **Download Options**, select the site you want to download changes from in the drop-down list. To download changes from every site, select **All connected sites**.
 5. Click **Connect**. Once connected, the message **Status: Changes have been received. Mappings must be added for the following new items before proceeding** displays, along with a list of fields.
 6. Click on the field you want to map.
 7. In the Mappings window, under **Destination**, select the field you want to map the connected site's field to, then click **OK**.
 8. Repeat steps 6-7 for each field listed.
 9. Once all fields are mapped, click **Next** to continue getting changes from DataShare.
1. Under Advanced Tools, click the **Admin Utilities** tab.
 2. In the drop-down list, select **Get Changes from DataShare** and click **Go** .
 3. In the DataShare - Get Changes, window, click **Click Here** to view the custom configuration options.
 4. In the Synchronization Settings window, under **Mapping Options**, click **View/Edit Saved Mappings**.
 5. In the Mappings window, select the mapping you want to view or edit in the drop-down list.
 6. Make any necessary changes and click **OK**.

Sending Changes to Connected Sites in DataShare

A connected church or organization makes changes in data and sends the changes to other DataShare sites. DataShare allows you to send information and changes on the **Profile** tab in View/Edit Individual to other sites, based on a saved search or by member status, pledges, and gifts. You must send your data changes, additions, and deletions to DataShare in order for other sites to receive them.

The first time you send data, all records that match your selected criteria are sent to the other sites. After this, updated records are sent, along with deleted records, so that those records are also deleted at the other site. You may change the filter settings of your criteria if you like.

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Send Changes to DataShare** and click **Go** .
3. In the Send Changes Filter Options window, select the **Filter Settings** to use for sending changes.
 - **Use saved search criteria** — Select to send records based on a saved search. For example, if you want to send changes to members' records, process and save a search for those with the **Member Status** of **Member**. Then, select the saved search in the drop-down list.
 - **Use selection below** — Select to send records and changes based on pledges, gifts, and member status. Then, select to include individuals or families who pledged and/or gave, and select the member statuses to include.
4. When the confirmation message displays, click **OK**.
5. In the Send Changes window, individuals whose records match your filter settings display. Click **Send Changes** to send these records through DataShare.
6. Once the records are sent, a confirmation message displays. Click **OK**, then **Close**.

Fields sent to DataShare

The fields below are sent to DataShare connected sites:

- Title
- First Name
- Middle Name or Initial
- Last Name
- Suffix
- Goes By Name
- Address
 - Primary Address Fields
 - Mailing Address Fields
 - Statement Address Fields
- City
- State

- ZIP Code
- Phone
- Phone Listed flag
- E-mail
- Date of Birth
- Marital Status
- Gender
- Church the individual is associated with
- Family Position
- Member Status
- Reason Deleted

Using Saved Search Criteria in DataShare

The new and updated records you send to DataShare are based on contributor information or saved search criteria. This allows you to send certain records and information to DataShare while excluding others.

For example, you need to send records and information regarding all church members to your diocese or organizational office. However, ACS contains records that belong to visitors, those who only attend Sunday School, and contributors who are not members of your church. If your diocese or organization office only needs member data, you can define and save a search for all members who have ACS records. Then, when you send information to DataShare, using this search ensures the diocese or organization gets the data they need.

1. On the ACS main menu, click **Searches**.
2. On the **Search Information** tab, select the appropriate settings for your search.
3. Click on the **Search Criteria** tab, then select the criteria for your search.
4. Process the search, then click the **Search Information** tab.
5. Click **Save Criteria**.
6. Enter a name for the search criteria set in the **Title** field.
7. **Optional:** Select **Public** if you want other ACS users to have access to the saved criteria.
8. Click **Save**.

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Send Changes to DataShare** and click **Go** .
3. At the top of the Send Changes window, select **Click Here** to adjust your filter settings.
4. In the Send Changes Filter Options window, select **Use saved search criteria**, then select the search you just saved.
5. Click **OK**.
6. When the Send Changes window displays the updated records, click **Send Changes** to send these records through DataShare.
7. When the records are sent and the confirmation message displays, click **OK**, then **Close**.

PhoneTree and VoiceWave

PhoneTree® is a voice message delivery system that is compatible with ACS. You can use it to let others know about upcoming events. In addition, it is especially helpful for notifying people of event delays or cancellations, such as in the case of inclement weather.



PhoneTree and VoiceWave Support

ACS Support provides help for creating the file in ACS to import into PhoneTree or VoiceWave.

Sending ACS Data to VoiceWave

You can use the PhoneTree Export to generate a file to use with VoiceWave™. In ACS, you will select the people you want to include through a search, then export their contact information using the PhoneTree Export.

Once you export your ACS data, you can import it into VoiceWave and start sending messages.

In the PhoneTree Export, you can select which method and type of contact information you want to use. You can export either:

- Each person's preferred contact method and type (whether it be phone, text, or e-mail).
Contact methods and types that you select specifically, such as "work phone," "home email," or "cell text."
1. Under **Searches and Reports**, click the **Reports** tab.
 2. In the drop-down list, select **People Reports** and click **Go** .
 3. In the upper sidebar, expand **Extracts**, then select **PhoneTree Export**.
 4. In the lower sidebar, click **Customize**.
 5. Under PhoneTree Options, select **VoiceWave Online**.
 6. Select your Export Options.
 7. **Optional:** If you want to change the file name or the location to save the file, click  in the Filename field.
 8. Click **Extract**.
 9. If a previous PhoneTree Export file exists, a message displays confirming that you want to overwrite it. Click **OK**.
 10. When the confirmation message displays, click **Yes**.

Sending ACS People Data to PhoneTree

You can export your ACS data to use with PhoneTree®. In ACS, you will select the people you want to include through a search, then export their contact information using the PhoneTree Export.

You can export contact information on a per family or per person basis, and you can also choose what contact information to export. For families, you can select home or preferred phone numbers, and you can include e-mail addresses. For individuals, you can select home, preferred, or other phone numbers, and you can also include e-mail addresses.

Exporting Contact Information from ACS

You will export your ACS data through the PhoneTree Export in People reports. Before you begin, process a search on the individuals you want to include in the export file.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **People Reports** and click **Go** .
3. In the upper sidebar, expand **Extracts**, then select **PhoneTree Export**.

4. In the lower sidebar, click **Customize**.
5. Under PhoneTree Options, select the file type according to what version of PhoneTree you are using.
6. Select any additional report options (see Additional Information for details), then click **Extract**.

 **Useful Information**

Be sure to use a file name without spaces. Otherwise, you may receive an error.

7. If a previous PhoneTree Export file exists, a message displays confirming that you want to overwrite it. Click **OK**.
8. When the confirmation message displays, click **Yes**.

 **PhoneTree Exception Report**

The confirmation message may include a notice that records were excluded because they have invalid or duplicate contact information. If you get this message, click **Yes** to view the **PhoneTree Exception Report**.

The report lists individuals who are excluded from the export because they had duplicate or no contact information available for the selected methods and types. The list includes the available contact information for the excluded individuals.

Importing ACS Data into PhoneTree

After you have exported your ACS data, you can import it into PhoneTree and start sending messages. This procedure varies depending on your version of PhoneTree.

1. Open PhoneTree.
2. On the **PhoneTree** tab, click the numbered PhoneTree icon where you want to store the extract.
3. On the Import menu, click **Import**.
4. Select **CSV**.
5. In the **Look in** field, select the location where you saved the extract file.
6. In the **File name** field, select the file you want to import.
7. Click **Open**.
8. In the Import Data window, select if you want to overwrite, append, or create a new file.
9. Click **Configure**.
10. Verify that the **Last Name**, **First Name**, and **Phone** are correct, then click **OK**.

1. Open PhoneTree.
2. On the PhoneTree Desktop, click **Select**.
3. Select the PhoneTree you want to use, and then click **Go to PhoneTree**.
4. Click **OK**.
5. Enter a file name for the import, then click **OK**.
6. On the Import menu, point to **Custom**, and then click **ACS**.
7. In the **Look in** field, select the location where you saved the extract file. 8. In the **File name** field, select the file you want to import and click **Open**.

8. When the Import Query window displays, click the appropriate answer.

Sending Special Mailings Data to PhoneTree

You can export ACS Special Mailings information to use with PhoneTree®.

ACS automatically exports the home phone number for each person, and you can also export other phone numbers and e-mail addresses. You can also select the Special Mailings groups you want to export.

Exporting Contact Information from ACS

You will use the PhoneTree Export within Special Mailings reports to generate the file.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **Special Mailings Reports** and click **Go**. 
3. In the upper sidebar, expand **Extracts**, then select **PhoneTree Export**.
4. In the lower sidebar, click **Customize**.
5. Under PhoneTree Options, select the file type according to what version of PhoneTree you are using.
6. To export the contact information of specific groups, under **Export Options**, select **Selected Groups** and click **Select**.
7. Select any additional report options (See Additional Information for details), then click **Extract**.
8. If a previous PhoneTree Export file exists, a message displays confirming that you want to overwrite it. Click **OK**.
9. When the confirmation message displays, click **Yes**.



PhoneTree Exception Report

The confirmation message may include a notice that records were excluded because they have invalid or duplicate contact information. If you get this message, click **Yes** to view the **PhoneTree Exception Report**.

The report lists individuals who are excluded from the export because they had duplicate or no contact information available for the selected methods and types. The list includes the available contact information for the excluded individuals.

Importing ACS Data into PhoneTree

After you have exported your ACS Special Mailings data, you can import it into PhoneTree and start sending messages. Instructions vary depending on your version of PhoneTree.

1. Open PhoneTree.
2. On the **PhoneTree** tab, click the numbered PhoneTree icon where you want to store the extract.

3. On the Import menu, click **ACS Import**.
 4. In the **Look in** field, select the location where you saved the extract file.
 5. In the **File name** field, select the file you want to import.
 6. Click **Open**.
-
1. Open PhoneTree.
 2. On the PhoneTree Desktop, click **Select**.
 3. Select the PhoneTree you want to use, and then click **Go to PhoneTree**.
 4. Click **OK**.
 5. Enter a file name for the import, then click **OK**.
 6. On the Import menu, point to **Custom**, and then click **ACS**.
 7. In the **Look in** field, select the location where you saved the extract file. 8. In the **File name** field, select the file you want to import and click **Open**.
 9. When the Import Query window displays, click the appropriate answer.

Sending Reservations Data to PhoneTree

You can export contact information for those involved in a Reservations activity to use with PhoneTree®.

ACS Reservations automatically exports the home phone number for each person, and you can also export other phone numbers and e-mail addresses.

Exporting Contact Information from ACS

You will use the PhoneTree Export within Reservations reports to generate the file.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **Reservations Reports** and click **Go**. 
3. In the upper sidebar, expand **Extracts**, then select **PhoneTree Export**.
4. In the lower sidebar, click **Customize**.
5. Under PhoneTree Options, select the file type according to what version of PhoneTree you are using.
6. To export the contact information of specific activities, under **Export Options**, select **Selected Activities** and click **Select**.
7. Manage the other settings to your liking. See Additional Information for details.
8. Click **Extract**.
9. If a previous PhoneTree Export file exists, a message displays confirming that you want to overwrite it. Click **OK**.
10. When the confirmation message displays, click **Yes**.

PhoneTree Exception Report

The confirmation message may include a notice that records were excluded because they have duplicate or invalid contact information. If you get this message, click **Yes** to view the **PhoneTree Exception Report**.

The report lists individuals who are excluded from the export because they had duplicate or no contact information available for the selected methods and types. The list includes the available contact information for the excluded individuals.

Importing ACS Data into PhoneTree

After you have exported your ACS data, you can import it into PhoneTree and start sending messages. Instructions vary depending on your version of PhoneTree.

1. Open PhoneTree.
2. On the **PhoneTree** tab, click the numbered PhoneTree icon where you want to store the extract.
3. On the Import menu, click **ACS Import**.
4. In the **Look in** field, select the location where you saved the extract file.
5. In the **File name** field, select the file you want to import.
6. Click **Open**.
1. Open PhoneTree.
2. On the PhoneTree Desktop, click **Select**.
3. Select the PhoneTree you want to use, and then click **Go to PhoneTree**. Click **OK**.
4. Enter a file name for the import, then click **OK**.
5. On the Import menu, point to **Custom**, and then click **ACS**.
6. In the **Look in** field, select the location where you saved the extract file. 7. In the **File name** field, select the file you want to import and click **Open**.
8. When the Import Query window displays, click the appropriate answer.

Sending E-mails

ACS lets you build a list of e-mail recipients based on your ACS records. For example, you might e-mail the parents of children between the ages of two and ten to remind them about registering for Vacation Bible School. To do this, generate a search for the parents in ACS, select them as your e-mail recipients, and then choose your e-mail method. Depending on the method you select, you may have to configure it before you start sending e-mails.

In ACS, you can send mass e-mails, which send the same e-mail message to everyone in a group. Or, you can send personalized e-mails by selecting fields to include, similar to a mail merge option in word processing software.

With ACS, you can send e-mails to Special Mailings groups, Reservations activities, and records found in Search results.

After selecting e-mail recipients, you must select your e-mail method. You can send e-mails to ACS recipients using the ACS E-mail Editor, Constant Contact, or your own e-mail client (such as Microsoft® Outlook®).

Selecting E-mail Recipients

ACS lets you build a list of e-mail recipients based on your ACS records. You can send e-mails to the people in a Special Mailings group, Reservations activity, or by performing a search.

After choosing your e-mail recipients, you must select an e-mail method: Constant Contact, The ACS Email Editor, or your Local E-mail Client.

1. Under **Manage Records**, select the **Groups** tab.
 2. In the drop-down list, select **Special Mailings Add/Edit Groups** and click **Go** .
 3. Select the group.
 4. In the right pane, click **Mass E-mail**.
 5. Under **Recipient Options**, manage the settings to your liking. See Additional Field Information for details.
-
1. Under **Manage Records**, select the **Communication** tab.
 2. In the drop-down list, select **Reservations Mass E-mail** and click **Go** .
 3. Select the activity and click **OK**.
 4. Under **Recipient Options**, manage the settings to your liking. See Additional Field Information for details.
-
1. Next to **Searches and Reports**, click **Searches**.
 2. Create and process a new search. Or, load and process a saved search.
 3. On the **Search Information** tab, in the right pane, click **Mass E-mail**.
 4. Under **Recipient Options**, manage the settings to your liking. See Additional Field Information for details.

Sending E-mails with Constant Contact

Constant Contact® is an online marketing company that offers email marketing, social media marketing, online survey, and event marketing tools. You can use Constant Contact to send professional e-mails to people stored in your ACS records.

To send e-mails to ACS recipients with Constant Contact

- Add your Constant Contact account to ACS.
- Select your ACS e-mail recipients.
- Send your ACS data to Constant Contact.

You can also manage what ACS data is sent to Constant Contact.

Adding Constant Contact Accounts to ACS

To send e-mails to ACS recipients with Constant Contact, you must first add your Constant Contact account to ACS. You can then send your ACS data to Constant Contact and create e-mailing lists for your ACS recipients. (You must have an active Constant Contact® account.)

After you add your account, you can select your ACS e-mail recipients and send your ACS data to Constant Contact.

1. Under **Manage Records**, click the **Communication** tab.
2. In the drop-down list, select **Mass Email** and click **Go** .
3. Click **Mass Email**.
4. Under **E-mail Method**, select **Constant Contact**.
5. Click **Manage Accounts**. The Select Account window displays.
6. Click **Add**.
7. In the **Account Name** field, enter a name to identify your Constant Contact account in ACS. (This doesn't have to match your Constant Contact Account information.)
8. Enter your Constant Contact **user name** and **password** and click **OK**.

Managing the Data Sent to Constant Contact

In ACS, you can manage what data is sent to Constant Contact. For example, the **Goes By** name stored in ACS is sent to Constant Contact as the **first name** by default. However, you can change this so that the formal first name is sent instead.

You can also select to send additional information from ACS to Constant Contact. After you do this, the data in that field is included when you send data from ACS to Constant Contact.

1. Under **Manage Records**, click the **Communication** tab.
2. In the drop-down list, select **Mass Email** and click **Go** .
3. Click **Mass Email**.
4. Under **E-mail Method**, select **Constant Contact**.
5. Click **Manage Accounts**.
6. Select the Constant Contact account and click **Edit**.
7. In the **ACS** column, click the field that corresponds to the information you want to send to Constant Contact.
8. Navigate to and select the ACS field you want to send and click **OK**.

Sending ACS Data to Constant Contact

After you have added your Constant Contact account to ACS and selected your e-mail recipients, you can send your ACS data to Constant Contact.

Sending your ACS data to Constant Contact creates an e-mail list in your Constant Contact account. After you do this, you can log in to Constant Contact to compose and send your e-mail.

Creating A New E-mail List

When you create a new list, all e-mail addresses from your ACS recipients list are added to the Constant Contact list. Constant Contact removes any e-mail addresses that have previously opted out of receiving emails from you. Unless you select **Preferred E-mail Only**, the list includes all e-mail addresses for the selected recipients.

1. Select your ACS e-mail recipients by performing a search, selecting a Special Mailings group, or selecting a Reservations activity. See [Selecting E-mail Recipients](#) to learn more.
2. In the **Build E-mail Recipients List** window, under **E-mail Method**, select **Constant Contact**.
3. Click **Manage Accounts**.
4. Select the Constant Contact account you want to send your ACS data to (To add a new Constant Contact account, click **Add**.) and click **OK**.
5. Enter a **New List** name and click **OK**.

Updating An E-mail List

If you have previously sent ACS data to Constant Contact, you can send it again to update the e-mail list. When you update the list, all new addresses are added to the list; existing addresses are left alone. Any other information that has changed, such as first names, is updated. Any e-mail addresses that are already in the list, but are not returned in the latest search results, are ignored: they are not removed from Constant Contact. Constant Contact also ignores any e-mail addresses that have previously opted out of receiving emails from you.

1. Select your ACS e-mail recipients by performing a search, selecting a Special Mailings group, or selecting a Reservations activity. See [Selecting E-mail Recipients](#) to learn more.
2. In the **Build E-mail Recipients List** window, under **E-mail Method**, select **Constant Contact**.
3. Click **Manage Accounts**.
4. Select the Constant Contact account you want to send your ACS data to and click **OK**.
5. In the **Select Contact List**, select the e-mail list and click **OK**.

Sending E-mails with Your Local E-mail Client

ACS lets you select recipients from your ACS data while using your own e-mail client to compose and send the e-mail. Using your own e-mail client (such as Microsoft® Outlook® or Mozilla® Thunderbird®) means the e-mail comes from your e-mail address and is stored in your Sent items. This is also the best way to send a quick e-mail to ACS recipients, since it requires no additional configuration.

1. Select your ACS e-mail recipients by performing a search, selecting a Special Mailings group, or selecting a Reservations activity. See [Selecting E-mail Recipients](#) to learn more.
2. In the **Build E-mail Recipients List** window, under **E-mail Method**, select **Copy to local client**.



Useful Information

You can set your e-mail batch size up to a maximum of 95.

3. Click **OK**. A blank e-mail opens in your e-mail client. The ACS recipients are listed in the BCC field.
4. Compose and send your message.

Sending E-mails with the ACS E-mail Editor

The ACS E-mail Editor lets you send e-mails directly from ACS — no other e-mail client required.

Before you can send e-mails using the ACS E-mail Editor, you must configure ACS to send e-mails. Then you can select your e-mail recipients and compose and send your e-mail.

You can also save e-mails for future use, generate a recipients report, and use the e-mail spellcheck and thesaurus.

Changing the Status of Recipients

After you have selected your e-mail recipients, you may decide that you don't want to send the e-mail to the majority of the list. Rather than rebuilding your recipients list from scratch, you can mass change the sending status of recipients.

You can change the status of a single recipient or all recipients. You can also change the status based on people's e-mail type and whether their address is listed or not. For example, if you don't want to send an email to unlisted addresses, you can change the status of all recipients with unlisted addresses to Do not Send.

1. In the E-mail Editor window, click **Recipients** .
2. Right-click the recipient.
3. Select **Change Send Status**.

People who will not receive the e-mail display in red with a status of "Do Not Send."

1. In the E-mail Editor window, click **Recipients** .
2. Click **Mass Change**.
3. Select **Send** or **Do not Send**.
4. Leave the E-mail Type and Listed options blank.
5. Click **OK**.

People who will not receive the e-mail display in red with a status of "Do Not Send."

1. In the E-mail Editor window, click **Recipients** .
2. Click **Mass Change**.
3. Select **E-mail Type**.
4. In the drop-down list, select the e-mail type.
5. Select **Send** or **Do not Send**.
6. Click **OK**.

People who will not receive the e-mail display in red with a status of "Do Not Send."

1. In the E-mail Editor window, click **Recipients** .
2. Click **Mass Change**.
3. Select **Listed**.

4. In the drop-down list, select **True** or **False**. (True means the addresses are listed; false means the addresses are unlisted.)
5. Select **Send** or **Do not Send**.
6. Click **OK**.

People who will not receive the e-mail display in red with a status of "Do Not Send."

Configuring ACS to Send E-mails

Before you can send emails with ACS, you must configure ACS to send emails. You must have rights to Add/Edit SMTP Settings in Add/Edit Users to set up the configuration.

If you change internet service providers, you must update your SMTP address to send emails.

OnDemand clients will configure ACS to send emails using the OnDemand configuration.

1. Under **Manage Records**, click the **Communication** tab.
2. In the drop-down list, select **Mass Email** and click **Go** . The Searches window displays.
3. Click **Mass E-mail**. The Build E-mail Recipients List dialog box displays.
4. Under **E-mail Method**, select **Use local SMTP**, and click **OK**. The E-mail Editor window displays.
5. Click the **E-mail Accounts** drop-down list, and select  **Manage E-mail Accounts**. The SMTP List window displays.
6. Click **Add**. The Add SMTP dialog box displays.
7. Enter the following information:
 - Your SMTP server address. If you don't know your server address, see Finding Your SMTP
 - Address. Your port number. (You can accept the default port number.) Your security type (for data encryption).
 - To verify that the sending email address is recognized by your server select **Authenticate**.
 - Authentication decreases the possibility that your emails are blocked by a firewall or other security settings.
 - To encrypt the email, select **Use SSL**.
 - To require a password before each email is sent, select **Verify Password on Send**.
 - Your user name. This is the user name for your Internet Service Provider email account.
 - Your password. This is the password for your Internet Service Provider email account.
8. Click **OK**.

Now you can select your e-mail recipients and then compose and send your e-mail.

Finding Your SMTP Address

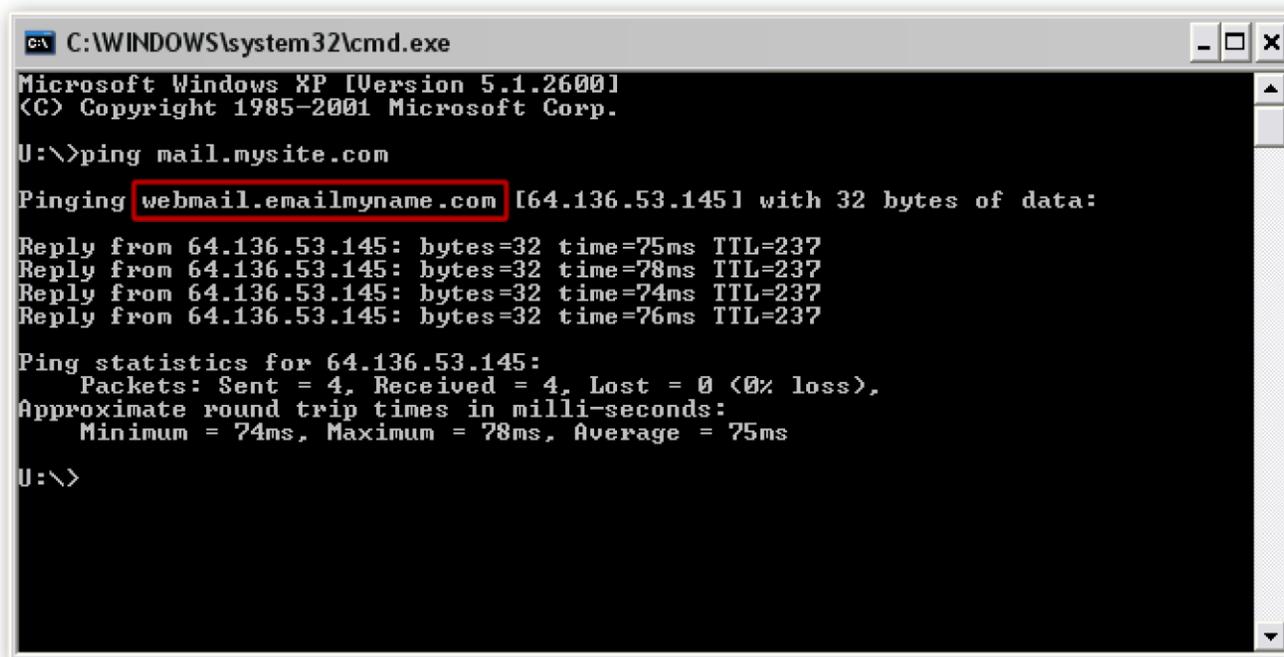
You must know your SMTP server address to configure ACS to send emails. An SMTP address displays in one of the following formats:

- As a series of numbers, such as 213.109.213.098
- As a descriptive location, such as microsoft.mailserver.com

1. Open the **Run** window.
 - a.) **Windows 7:** On your Windows desktop, click the Start button  in the lower-left corner of the screen. The Start menu displays. In the search box, located at the bottom of the Start menu, type **run**. Click  **Run**. The Run window displays.

- b.) **Windows 8.1 and Windows 10:** On the Windows desktop, right-click the Start button  in the lower-left corner of the screen. A Windows context menu displays. Click **Run**. The Run window displays. Link
2. Type **CMD**, and click **OK**. The Windows Command Prompt application opens.
 3. Type **ping smtp.mysite.com**.
 - If this returns an error, type **ping mail.mysite.com** instead.

Your SMTP address is listed directly after the word "Pinging." See an example below. Once you have determined your SMTP address, you can return to configuring ACS to send e-mails. If you have trouble determining your SMTP address, contact your Internet service provider.



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

U:\>ping mail.mysite.com

Pinging webmail.emailmyname.com [64.136.53.145] with 32 bytes of data:

Reply from 64.136.53.145: bytes=32 time=75ms TTL=237
Reply from 64.136.53.145: bytes=32 time=78ms TTL=237
Reply from 64.136.53.145: bytes=32 time=74ms TTL=237
Reply from 64.136.53.145: bytes=32 time=76ms TTL=237

Ping statistics for 64.136.53.145:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
    Approximate round trip times in milli-seconds:
        Minimum = 74ms, Maximum = 78ms, Average = 75ms

U:\>
```

Composing and Sending E-mails

Once you have configured ACS to send e-mails and selected your e-mail recipients you can compose and send your e-mail with the ACS E-mail Editor. After you click Send, the progress meter and checklist display to notify you when the e-mail is sent.

You may also want to save the e-mail for future use, generate a recipients report, change the status of all recipients, and manage the e-mail spellcheck and thesaurus.

Note

If you are an OnDemand client and are attaching a file to your e-mail, you should copy that file from your hard drive to the S drive first. [View more information](#).

1. Select your ACS e-mail recipients by performing a search, selecting a Special Mailings group, or selecting a Reservations activity. See Selecting E-mail Recipients to learn more.
2. In the **Build E-mail Recipients List** window, under **E-mail Method**, select **Use local SMTP**.
3. Click **OK**. The ACS E-mail Editor opens.

4. To compose a new e-mail, click **New** .
5. In the **From** field, enter the sending e-mail address.
6. Enter the e-mail **Subject**.
7. Enter the e-mail body.

Printing a Recipients Report

You can print a list of your e-mail's recipients. This is helpful to keep for your records.

If your e-mails stop sending, you can print this list and find the last person the e-mail was sent to. Then, correct that e-mail address, edit your search results to remove those who the e-mail was sent to, and resend the e-mail to the others.

1. In the E-mail Editor window, click **Recipients** .
2. In the Recipients window, right-click and select **Print Grid**.
3. Manage the preferences to your liking, then click **File > Print**.

Saving E-mails for Future Use

You can save e-mails that you created for future use. For example, if you send a weekly reminder to staff to turn in their time sheets, you can save this e-mail in ACS to speed up the process of sending it each week.

Saving an e-mail saves the *from* address, subject, text, formatting, merge fields, attachments, and e-mail options. However, saving an e-mail does *not* save the recipients of the e-mail. You must select your recipients each time you send the saved e-mail.

1. After you have selected your recipients and composed the email, click **Save** .
2. Enter a name for the e-mail.
3. Click **Save**.

1. After you have selected your e-mail recipients, click **Open** .
2. Select the e-mail.
3. Click **OK**. Now you can edit the e-mail, save it again, or send it.

1. Next to **Searches and Reports**, click **Searches**.
2. In the right pane, click **Mass E-mail**.
3. Under **E-mail Method**, select **Use Local SMTP** and click **OK**.
4. Click **Open** .
5. Select the e-mail and click **Delete**.
6. When the confirmation message displays, click **Yes**.

Using the E-mail Spellcheck and Thesaurus

In the ACS E-mail Editor, you can correct misspelled words individually or in mass and look up synonyms and antonyms.

You can customize the spellcheck to correct automatically as you type, to ignore abbreviations, uppercase words, and web addresses, and to correct dual capitalization and double-words. You can add custom dictionaries to add new words, exclude certain words, and automatically replace specific words with others.

Checking Spelling in E-mails

After you have selected your recipients and composed your e-mail, you can check spelling. To spellcheck



Tip

If the Spellcheck doesn't detect any misspellings, "Spellcheck is complete" displays.

1. Click **Spellcheck** . The Spellcheck reviews the first occurrence of a misspelled word and offers replacement terms and suggestions.
2. For each word, do one of the following:
only a particular section of text, highlight that text before clicking **Spellcheck**
 - To ignore the replacement term and suggestions, click **Ignore**.
 - To replace the misspelled word with the word in the Replace With field, click **Change**.
 - To replace all occurrences of the misspelled word with the word in the Replace With field, click **Change All**.
 - To add the misspelled word to the Spellcheck dictionary (so that it is no longer considered a misspelling), click **Add**.
 - To replace the misspelled word with the first word in the Suggestions list, click **Auto-Correct**.
 - Enter the word you want to replace the misspelled word and click **Change** or **Change All**.
3. Click **OK** when the spellcheck is complete.

Custom Dictionaries

You can create a custom dictionary so that misspellings — and pet-peeves — are corrected to your preference. For example, if you want all occurrences of "irregardless" replaced with "regardless," you can set these words as an auto-correct pair in your custom dictionary.

You can also edit dictionaries, including the default dictionary included with ACS, to match your word preferences.

1. Next to **Searches and Reports**, click **Searches**.
2. In the right pane, click **Mass E-mail**.
3. Under **E-mail Method**, select **Use Local SMTP**.
4. Click **OK**. The E-mail Editor opens.
5. Click **Spellcheck Setup** .
6. Click **Dictionaries**, then click **New**, then enter a name for the new custom dictionary.
7. Click **OK**. Now you can manage the words in the dictionary.

1. Next to **Searches and Reports**, click **Searches**.
2. In the right pane, click **Mass E-mail**.
3. Under **E-mail Method**, select **Use Local SMTP**.
4. Click **OK**. The E-mail Editor opens.
5. Click **Spellcheck Setup** .
6. Click **Dictionaries**.
7. Select the dictionary and click **Edit**. Now you can manage the words in the dictionary.

1. Next to **Searches and Reports**, click **Searches**.
2. In the right pane, click **Mass E-mail**.
3. Under **E-mail Method**, select **Use Local SMTP**.
4. Click **OK**. The E-mail Editor opens.
5. Click **Spellcheck Setup** .
6. Click **Dictionaries**.
7. Select the dictionary and click **Delete**.
8. When the confirmation message displays, click **Yes**.

Managing the Words in Custom Dictionaries

A custom dictionary allows you to customize the spellcheck process. You can add words so that they are always considered correct. You can exclude words so that they are always considered incorrect. You can also add auto-correct pairs so that each occurrence of a particular word is always replaced with another word.

1. In the E-mail Editor window, click .
2. Click **Dictionaries**, then select the dictionary and click **Edit**.
3. On the **Added Words** tab, enter the word.
4. Click **Add**, then **OK**.

1. In the E-mail Editor window, click .
2. Click **Dictionaries**.
3. Select the dictionary and click **Edit**.
4. On the **Excluded Words** tab, enter the word.
5. Click **Add**, then click **OK**.

1. In the E-mail Editor window, click .
2. Click **Dictionaries**.
3. Select the dictionary and click **Edit**.
4. On the **Auto-Correct Pairs** tab, in the **Replace** field, enter the word that you want replaced. For example, irregardless.
5. In the **With** field, enter the word you want to replace it. For example, regardless.
6. Click **Add**, then **OK**.

Managing Spellcheck and Thesaurus Options

You can configure your preferences for spelling and grammar changes in ACS. You can also select the dictionaries that are referenced for the Spellcheck and Thesaurus.

1. Next to **Searches and Reports**, click **Searches**.
2. In the right pane, click **Mass E-mail**.
3. Under **E-mail Method**, select **Use Local SMTP**.
4. Click **OK**. The E-mail Editor opens.
5. Click **Spellcheck Setup** .
6. Manage the options to your liking. For detailed help, see Additional Option Information.
7. Click **OK**.

Using the E-mail Thesaurus

Use the e-mail Thesaurus to look up synonyms and antonyms for words in the body of your e-mail. The Thesaurus includes a variety of contexts (definitions) for each word. Use the contexts to narrow your search for a replacement word.

1. After you have selected your recipients and composed your e-mail, highlight the word you want to look up.
2. Click **Thesaurus** . A list of different contexts and suggestions displays.
3. Do one of the following:

- To see different contexts of the word, in the **Contexts** list, select a term.
- To look up a word in the **Replace With** list, select the word and click **Lookup**.
- To return to the previous list of contexts and suggestions, click **Previous**.
- To replace the word with one of the suggested terms, select the term and click **Replace**.
- To leave the word as it is, click **Cancel**.

Quick View

ACS People Quick View provides a quick listing and summary information for all of the people in your ACS database. It accesses the same data as ACS. Since ACS Quick View is a smaller program, you can use it to look up basic information such as addresses and phone numbers more quickly. You can look up a person's address, phone numbers, e-mail address, and pictures.

ACS Organizations Quick View is a tool you can use to quickly look up information about your organizations and their staff members. ACS Quick View provides a list of any positions the staff member has held along with his or her primary affiliation. You can also get directions to a person's address or copy their name and address to the clipboard for use in other programs.

You can use ACS Quick View on a computer that has the single PC version of ACS installed, or on a network that has the network version of ACS installed. You can also use Quick View while ACS is running.

Customizing Quick View

You can customize many areas in ACS Quick View.

With the appropriate security rights, you can add fields, date fields, and lists to the Personal Information area and set the default e-mail tab.

Granting Quick View Setup Access

By default, users are not allowed to customize ACS Quick View. You can grant access to ACS Quick View Setup in the Add/Edit Users section of the ACS People Suite. If a user does not have access to ACS Quick View Setup, the Setup option does not display on the File menu.

1. Log in to the ACS People Suite.
2. On the **Utilities** menu, click **Add/Edit Users**.
3. Select the user to whom you want to grant access, and click **Edit**.
4. On the **Security** tab, expand the **People** module.
5. Double-click **Quick View Setup** to change the rights from **None** to **All**.
6. Click **OK**.

Requiring User Login in Quick View

By default, users are not required to log in to ACS Quick View. You can choose to require users to log in. If you require users to log in, users will only see data that the user has rights to see.

1. On the **File** menu, click **Login**.
2. Enter your user name and password, then click **OK**.
3. On the **File** menu, click **Setup**. If Setup is not available, you might not have the appropriate rights to access Setup. For more information, see Granting Quick View Setup Access.

4. Select **Require Login**.
5. Click **OK**.

1. On the **File** menu, click **Setup**. If Setup is not available, you might not have the appropriate rights to access Setup. For more information, see Granting Quick View Setup Access.
2. Clear the **Require Login** check box.
3. Click **OK**.

Adding and Removing Custom Quick View Fields

You can customize many areas in ACS Quick View by adding fields, date fields, and lists to the Personal Information area as well as setting the default email tab.

You can also add up to 10 custom fields to the Personal Information area. These fields can be either standard fields or additional fields defined by your organization.

Tip

If you use People and Organizations, the tab that contains the People information is named Staff by default. You can rename this tab and title it People in the Tab Caption field under People Settings.

1. On the **File** menu, click **Setup**. If Setup is not available, you might not have the appropriate rights to access Setup. For more information, see Granting Quick View Setup Access
2. Under **Field Settings**, select the fields you want to add from the available Field lists.
3. Click **OK**.

1. On the **File** menu, click **Setup**. If Setup is not available, you might not have the appropriate rights to access Setup. For more information, see Granting Quick View Setup Access.
2. Under **Field Settings** select the fields you want to remove and press the **Delete** key.
3. Click **OK**.

Setting the Default Quick View E-Mail Type

By default, ACS Quick View displays the first email address listed for a person. You can select a specific default email type. If that type of email address exists for a person, it displays. Otherwise, the individual's preferred email address displays.

1. On the **File** menu, click **Setup**. If **Setup** is not available, you might not have the appropriate rights to access Setup. For more information, see Granting Quick View Setup Access.
2. Under **General Settings**, select the **Default E-mail Type**.
3. Click **OK**.

People Quick View

ACS Quick View is a tool you can use to quickly access information about the people in your database. It accesses the same data as ACS software. Since ACS People Quick View is a smaller program, you can save time by using it to look up basic information such as addresses and phone numbers.

ACS Quick View can be used on a computer with the ACS desktop software installed or on a network with the ACS network software installed.

With ACS Quick View, you can access a person's address, phone numbers, email address, and pictures. The program provides a list of any small groups or Sunday School classes the person belongs to. You can also get directions to a person's address, or copy their name and address to the clipboard for use in other programs.

Personal information can also be customized by adding additional fields, date fields, and lists to the Personal Information area.

Ready to get started? Just click on a link below to learn more about ACS Quick View.

Working with Individual Records in People Quick View

ACS People Quick View provides a quick listing and summary information for all of the people in your ACS database.

You can look up a person's address, phone numbers, email address, and pictures. ACS People Quick View provides a list of small groups or Sunday School classes the person belongs to. You can get directions to a person's address, or copy their name and address to the clipboard for use in other programs.

You can also customize personal information by adding additional fields, date fields, and lists to the Personal Information area.

Searching, Sorting, and Grouping People in People Quick View

By default, all of the records in ACS software display in the Name list. You can search for specific people by name, address, or phone number. When searching for people, you can enter a full or partial name, address, or phone number.

By default, people are sorted alphabetically by last name. You can also group them by family or sort them by first name.

1. In the **Last Name, First Name** field, enter all or a portion of the person's last name. You can also use a comma and type the first few letters of the first name. For example, enter the letters "gai,m" (without quotes) to search for Michele Gainey.
2. Press **Enter**. The people whose names meet the criteria are listed in the **Names** list.

1. In the **Address** field, enter all or part of the address you want to search for.
2. Press **Enter**. The people whose names meet the criteria are listed in the **Names** list.

1. In the **Phone** field, enter all or part of the phone number you want to search for.
2. Press **Enter**. The people whose names meet the criteria are listed in the **Names** list.

1. Right-click in the **Names** list.
2. Click **Sort by Last Name**.

1. Right-click in the **Names** list.
2. Click **Sort by First Name**.

1. Right-click in the **Names** list.
2. Click **Sort by Family**.

Copying Information in People Quick View

You can copy a person's name and address to the Windows clipboard for use in other programs. You can choose between the family and individual names, as well as the formal and informal names.

1. Select the person whose name and address you want to copy to the Windows clipboard.

2. Click the **Copy to Clipboard**  button.
3. Click the desired name and address combination. The name and address are copied on to the Windows clipboard and can be pasted into any Windows program that supports pasting from the clipboard, such as Microsoft Word.

Getting Directions in People Quick View

With ACS People Quick View and an Internet connection, you can quickly get directions to a person's home or office address. Directions are given from your organization's address as entered in the ACS software under Site Information Setup. If your organization's address is not in the ACS software, ACS People Quick View provides a map of the general vicinity of the person's address instead of detailed directions.

1. Select the person to whose address you want directions.
2. If more than one address exists for the person, select the address to which you want directions by clicking the address tabs.
3. Click the address. Your browser opens with directions to the person's address.

Viewing Pictures in People Quick View

Pictures are helpful for associating a name with a face, especially in large organizations. If you have a person's individual or family picture in the ACS software, you can view it with ACS People Quick View.

1. Select the person whose picture you want to view.

2. Click the **View Picture**  button.

Organizations Quick View

ACS Organizations Quick View provides a quick listing and summary information for all of your organizations and staff members.

You can look up an organization's Address, phone numbers, email address, website, PIN, Parent, and staff members. Staff members can be filtered by date, showing only the staff members active on the selected date.

You can also get directions to an organization or copy the organization's name and address to the clipboard for use in other programs. You can even view the organization's picture, if the organization has a picture uploaded in ACS.

Organization information can also be customized by adding additional fields, date fields, lists, and statistics to the Organizations tab.

Changing Display Names and Sort Order in Organizations Quick View

By default, organizations are displayed and sorted alphabetically by name. Since many organizations have the same name, you can also display the organization's primary address or meeting address with the organization's name, or you can display the organizations by reference name.

1. Click the **Organizations** tab.
2. Right-click in the names list.
3. Click the display you want and sort properties.

Copying Information in Organizations Quick View

You can copy the organization's name and address to the Windows clipboard for use in other programs.

1. Click the **Organizations** tab.
2. Select the organization whose name and address you want to copy to the Windows clipboard.

3. Click the **Copy to Clipboard**  button.
4. Click the desired name and address combination. The name and address are copied on to the Windows clipboard and can be pasted into any Windows program that supports pasting from the clipboard, such as Microsoft Word.

Getting Directions in Organizations Quick View

With ACS Quick View and an Internet connection, you can quickly get directions to an organization's office. Directions are from your organization's address as entered in ACS under Site Information Setup. If your organization's address is not in ACS, ACS Quick View provides a map of the general vicinity of the organization's address instead of directions.

1. Click the **Organizations** tab.
2. Select the organization to which you want directions.

3. If more than one address exists for the organization, select the address to which you want directions by clicking the address tabs.
4. Click the address. Your browser opens with directions to the organization's address.

Searching for Organizations in Quick View

By default, all organizations are listed in the Name list. You can search for specific organizations or filter the list by name, address, city, PIN, or level.

When searching by name, address, or city, you can enter the full name, address, city, or PIN, or a partial name, address, city, or PIN.

1. Click the **Organizations** tab.
2. In the **Name** field, enter all or a portion of the organization's name or reference name.
3. Press Enter. The organizations whose names or reference names meet the criteria are listed in the Names list.

1. Click the **Organizations** tab.
2. In the **Address/City** field, enter all or a portion of the organization's street address, PO box, or city.
3. Press Enter. The organizations whose address or city meet the criteria are listed in the Names list.

1. Click the **Organizations** tab.
2. In the **PIN** field, enter all or a portion of the organization's PIN.
3. Press Enter. The organizations whose PIN meets the criteria are listed in the Names list.

1. Click the **Organizations** tab.
2. In the **Level** list, select the level by which you want to filter the list.

Viewing Pictures in Organizations Quick View

If an organization has a picture uploaded in ACS, you can view the picture in ACS Quick View.

1. Click the **Organizations** tab.
2. Select the organization whose picture you want to view.

3. Click **View Picture** .

Mail Merge

With ACS Mail Merge, you can create letters, mailing labels, and envelopes for a group of individuals or for a single individual in your database. You can merge to an existing document or you can create a new one.

You can insert data fields from the **People**, **Contributions**, and **Organizations** fields into your document.

Mail Merge Fields

Once your document is open, you can insert mail merge fields based on the options you chose in setup.

Mail Merge Setup

After you select the recipients for your mail merge, you will need to select your setup options. You will then create a new document, load an existing document previously created, or edit a document that has already been loaded into the Mail Merge window.

1. In the **Mail Merge** window, click **Mail Merge Setup**.
2. Select the options you want on the **Name Settings**, **Special Fields**, **Contributions**, and **Merge Options** tabs.
3. Click **Process**.
4. Click **Close**.

Processing a Mail Merge Document

When processing a mail merge, you can load a document that has been previously created, edit a document that has already been loaded into mail merge, or create a new document.

Creating a New Document

When you create a new document for mail merge, select your recipients and select your options in Mail Merge Setup first.

1. In the Mail Merge window, click **Mail Merge Setup**.
2. Select the options you want on the **Name Settings**, **Special Fields**, **Contributions**, and **Merge Options** tabs.
3. Click **Process**, then click **Close**.
4. In the Mail Merge window, click **Create New Main Document**.

Editing a Document

If you have previously loaded a document that you want to use for your mail merge, select your recipients, select your mail merge setup options, then edit the document.

1. In the Mail Merge window, click **Load Document**.
2. Select the document you want to edit, then click **Mail Merge Setup**.
3. Select the options you want on the **Name Settings**, **Special Fields**, **Contributions**, and **Merge Options** tabs.
4. Click **Process**, then click **Close**.

5. In the Mail Merge window, highlight the document you loaded, then click **View/Edit Main Document**.

Loading a Document

After selecting your mail merge recipients, you can load a previously created document to process. Select your options in Mail Merge Setup then edit the document.

1. In the Mail Merge window, click **Load Document**.
2. Select the document you want from your hard drive.
3. Click **OK**.
4. In the Mail Merge window, highlight the document you loaded, then click **Mail Merge Setup**.
5. Select the options you want on the **Name Settings**, **Special Fields**, **Contributions**, and **Merge Options** tabs.
6. Click **Process**, then click **Close**.
7. In the Mail Merge window, highlight the document you loaded, then click **View/Edit Main Document**.

Selecting Mail Merge Recipients

You can process a mail merge for a group of individuals or for just one person.

If you are processing a mail merge for a group, you will select these individuals through Searches. You can use the Edit Results option in Searches to select the individuals you want if they do not have search criteria in common. If you are processing a mail merge for just one individual, you will select this individual through the Find Person window.

1. Under **Manage Records**, select the **People** tab.
 2. In the drop-down list, select **View/Edit Individual** and click **Go** .
 3. Select the individual you want to process a mail merge for, and click **View/Edit**.
 4. On the **Profile** tab, click **Send Letter** .
1. Under **Searches and Reports**, click **Searches**.
 2. Select your search criteria and process the search, or load a previously saved search. If necessary, you can edit your search results to remove or add individuals.
 3. On the **Search Information** tab, click **Mail Merge**.

ACS Multi-Site

With ACS Multi-Site, you can track giving across campuses and create departmental fields for the individuals in your church or organization.

Departmental Fields

Note

Departmental Fields are available if you are an Organizations client or if you purchase the ACS Multi-Site module. The ACS Multi-Site module is available to clients enrolled in the MegaChurch Client Program for free, and is available to all other clients for purchase.

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

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

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

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

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

Setting up User Rights for Departmental Fields

You can grant access to view, edit, and set up departmental fields. You can also limit which departmental fields users have access to.

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

2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. Click the **Information** tab.
5. Select **Limit Departmental Fields**, then click **Select**.
6. Select the departmental fields you want the user to have access to. Click **OK**.
7. Click **Apply**, then **OK**.

Setting up the Departmental Fields Tab

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

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

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

Entering Departmental Fields for an Individual

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

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

Working with Departmental Fields

You can process searches to view the individuals who meet specific departmental fields criteria. You can then export the results to Excel®, send a mass e-mail, or process an Advanced Export.

1. Under Searches and Reports, click **Searches**.
2. On the **Search Information** tab, select the appropriate options under **Search On**, **Include Records That**, and **Search Output Flag**.
3. Click **New Search**.
4. Expand **Departmental Fields**.
5. Expand the department you are working with, then double-click the criteria you want to search on.
6. Select your options, then click **OK**.
7. If you are adding other items to the search criteria, make these selections. For example, if you want to include the criteria of **Member Status**.
8. Click **Process**. When the confirmation message displays, click **OK**.
9. Click the **Results** tab to view your results.

Working with Mass Change and Departmental Fields

Caution

Depending on the options you select, you could be changing all records in a filter or search results. Confirm the correct records are selected before processing the mass change. Also make sure you have a current backup in case a mistake occurs.

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

1. If you have not already done so, make a backup.
 2. Under Manage Records, click the **Tasks** tab.
 3. Select **People Mass Change** and click **Go** .
 4. In the Mass Change window, under **Change Mode**, select **Change Field Value**.
 5. Under **Available Fields**, select the field you want to change.
 6. Under **Include**, select the appropriate option according to which records you want to change.
 7. Under **Move To**, enter or select the **Value to Change** and/or the **New Value**.
 8. Click **Change**.
-
1. If you have not already done so, make a backup.
 2. Under Manage Records, click the **Tasks** tab.
 3. Select **People Mass Change** and click **Go** .
 4. In the Mass Change window, under **Change Mode**, select **Move Field**.
 5. Under **Available Fields**, select the **Individual**, **Family**, or **Address** field you want to move to a departmental field.
 6. Under **Move To**, select the departmental field you want to move the **Individual**, **Family**, or **Address** field to. Only alphanumeric, list, and date fields are available to move into. Individual, organizations, currency, and number fields are not available, and the field's description name is not moved.
 7. Click **Move**.

Campuses in Contributions

 **Note**

Campuses are available when you purchase the ACS Multi-Site module. The ACS Multi-Site module is available to clients enrolled in the MegaChurch Client Program for free, and is available to all other clients for purchase.

When you own the Multi-Site module, you can track gifts and process reports by campus. You can assign funds and services to each campus when you set them up in Define Lists.

Setting up User Rights for Campuses

You can grant access to set up campuses and services in Define Lists. You can also limit which campuses users have access to. When you limit users to certain campuses, they cannot access funds assigned to campuses they do not have rights to when running reports, inquiries and searches. Only the campuses they have access to will be available in the Campus drop-down list when entering contributions.

 **Note**

This option is for setting up the campuses and services in Define Lists only. This does not determine whether a user can select campuses when posting contributions.

1. Under Advanced Tools, click the **Admin Utilities** tab. 
2. In the drop-down list, select **Add/Edit Users**, then click **Go**.
3. Select a user in the grid and click **Edit**.
4. Click the **Security** tab.
5. Expand **People**.
6. To grant access to set up campuses and services in Define Lists, right-click **Multi-Campus Setup** and select **All**. To prevent a user from setting up campuses and services, select **None**.
7. Click **Apply**, then **OK**.

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. Click the **Information** tab.
5. Select **Limit Campuses**, then click **Select**.
6. Select the campuses you want the user to have access to. Click **OK**.
7. Click **Apply**, then **OK**.

Setting up Campuses in Define Lists

You can set up your campuses in Define Lists to work with ACS Contributions. For each campus, you can assign the service times and funds that each one uses.

Funds

When funds are assigned to a campus, other campuses cannot use those funds. However, when entering a batch of contributions where no campus is selected, you can post to any fund including those assigned to a campus.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Expand **Multi-Campus**, then select **Service**.
4. Click **Add**.
5. Enter the service name or time in the **Service Description** field.
6. Click **OK**.

Tip

To add several services at one time, select the **Add Another** checkbox.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Expand **Multi-Campus**, then select **Service**.
4. Select the service you want to change, then click **Edit**.
5. Make the necessary changes, then click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Expand **Multi-Campus**, then select **Campus**.
4. Click **Add**.
5. Enter the campus name in the **Campus Description** field.
6. **Optional:** If you have services set up, click the **Services** tab, then click **Select** to assign services to the campus.
7. **Optional:** Click the **Funds** tab, then click **Select** to assign funds to the campus.
8. Click **OK**.

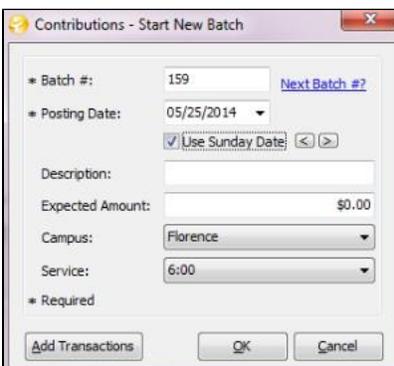
Tip

To add several campuses at one time, select the **Add Another** checkbox.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Expand **Multi-Campus**, then select **Campus**.
4. Select the campus you want to change, then click **Edit**.
5. Make the necessary changes, then click **OK**.

Entering and Posting Contributions

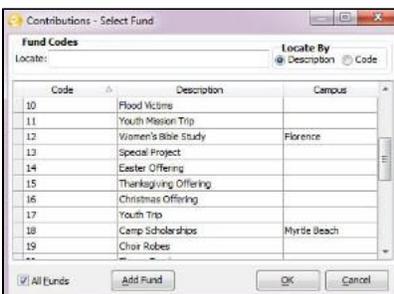
When starting a new batch of contributions, you can select a campus to post to. If services are assigned to a campus, only those service times display as options in the Service drop-down list.



The screenshot shows a dialog box titled "Contributions - Start New Batch". It contains the following fields and controls:

- Batch #: 159 (with a "Next Batch #?" link)
- Posting Date: 05/25/2014 (with a dropdown arrow)
- Use Sunday Date (with left and right arrow buttons)
- Description: (empty text field)
- Expected Amount: \$0.00
- Campus: Florence (dropdown menu)
- Service: 6:00 (dropdown menu)
- Required: (checkbox)
- Buttons: Add Transactions, OK, Cancel

When entering transactions, the available funds are the ones linked to the selected campus and the funds that are not linked to any campus. However, there is an option in Add/Edit Users to Enter All Funds regardless of what campus is selected. When a user has access to this, the All Funds checkbox displays on the Contributions - Select Fund window. When this option is selected, you can post to all funds regardless of the campus selected.



The screenshot shows a dialog box titled "Contributions - Select Fund". It contains the following elements:

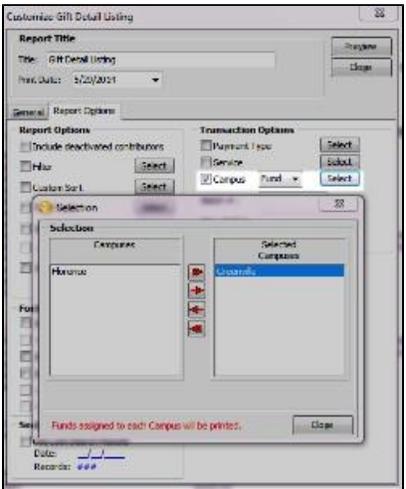
- Locate: (text field)
- Locate By: Description Code
- Table with columns: Code, Description, Campus
- Buttons: All Funds (checkbox), Add Fund, OK, Cancel

Code	Description	Campus
10	Flood Victims	
11	Youth Mission Trip	
12	Women's Bible Study	Florence
13	Special Project	
14	Easter Offering	
15	Thanksgiving Offering	
16	Christmas Offering	
17	Youth Trip	
18	Camp Scholarships	Myrtle Beach
19	Choir Robes	

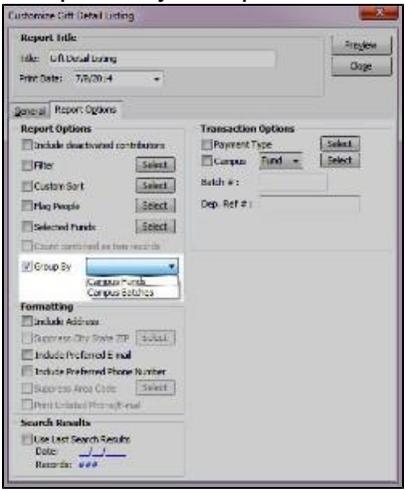
If you do not select a campus, you can post to any fund and any service.

Contribution Reports

For many of the contributions reports, you can select which campuses to print. For example, you can customize the Gift Detail Listing report to print only the gifts posted to the Greenville campus.



You can also select how to group these reports, by Campus Funds or Campus Batches.



Campus Affiliation for Families and Individuals

You may want to keep track of which families and individuals are associated with each campus. You can do this by creating an additional field in Define Lists for either the Additional Fields tab (individual) on an individual's record, or the Family tab, depending on how you want to track this information.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Expand **Individual** or **Family**, depending on whether you want to track the campus affiliation for each family or each individual.
4. Expand **Lists**.
5. Select one of the **Not Defined List** items. Click **Activate Field**.
6. Enter the **Field Description**, such as "Campus" or "Campus Affiliation."
7. Click **Add**.
8. Enter a campus name in the **Field Description**. Select **Add Another** to add several campuses at one time.
9. Click **OK**.
10. Once you finish adding all campuses, click **Close**. The drop-down list of campuses will display on either the **Additional Fields** tab or the **Family** tab.