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Organizations

The Organizations module in ACS People Suite is designed to record and report information about the offices that constitute your organization.

The Organizations module assists you in tracking information on your entire organization and can be adapted to fit your organization's needs. You can keep track of organizations on all levels as well as staff information. The Organizations module also contains unlimited Statistics fields to track fields specific to your organization or denominational office.

Using this Guide

New to ACS Organizations? We suggest checking out the Organizations Startup Outline and Gathering Organization Information topics to learn how to effectively set up the Organizations module. In addition, the topic about Organizations Security Rights can help you set up security levels for your staff members who will work with the Organizations module.

If you've been using ACS Organizations, you may want to read the latest ACS Release Notes to learn about any new features or corrections.

Organizations Startup Outline

Before you start, follow the basic startup procedures found below.

✔ Gather organization information.

✔ Add organization levels.

> **Be Careful**
>
> Entering your organization levels correctly is critical. You cannot go back and change the hierarchy of organization levels once you begin entering your organizations.

✔ Decide on PIN setup and either configure Organizations to use the same PIN and envelope number or configure Organizations to use different PIN and envelope numbers.

✔ Add staff positions.

✔ **Optional:** Add position levels.

✔ Define open dates, fields and lists.

✔ **Optional:** Activate the Organizations Changes Log. Activating the Organizations Changes Log lets you track changes made to organization records. We recommend activating this option.

✔ Set up your defaults for newsletter, statements, and e-mail.

✔ Decide if you want to enforce organization hierarchy and/or allow unaffiliated organizations.

✔ Choose your duplicate checking setting.

✔ Add organizations.

✔ Add staff members and select a staff member as the primary contact.

✔ Configure statistics fields and add organization statistics.

> **Note**
>
> We recommend making a backup of your data before entering organizations.

Gathering Organization Information

Before you begin entering data, it is important that you collect and organize the necessary information concerning your organization and the organizations within your organization.

Collecting this information before you begin entering data in the Organizations module saves you valuable time and the frustration of stopping and starting in the middle to find information.

Here are examples of the kind of information you need to gather:

Collect...	to...
a list of organization levels	assist you when setting up the list of organization levels. It is important that you enter the complete list of organization levels in the correct order before you begin entering organizations. You cannot rearrange the organization levels after you begin adding organizations. Any organization level you add is placed at the bottom of the organization hierarchy.
a list of possible open categories and values for the categories	assist you when setting up the user-defined lists in Define Lists. These lists display on the Additional Fields tab. Each list you set up has a drop-down from which you choose. Examples of how you might use lists are church size, location type. Do not use lists to store information that changes yearly.
a list of staff positions and position levels for each position	assist you when entering the staff positions in Define Lists. Remember to include staff positions for all organization levels. For each staff position, list all possible levels for the position. Position levels are optional.
the necessary information concerning all organizations	assist you when entering organizations. This information includes: • Organization Name and Reference Name • Organization Primary Address and Meeting Address • PIN number • Year Established • Notes • Phone/Fax/Beeper/E-mail information • Staff information • Statistics

Collect...	to...
a list of dates you want to track	assist you when setting up user-defined dates. The same open dates are used for all organizations within your organization. These fields are stored in the organization's records and should not be dates that change yearly. An example of a date you might track is Date Affiliated. There are five date fields.
a list of possible open fields you want to track	assist you when defining the user-defined fields. The same open fields are used for all organizations within your organization. These fields are stored in the organization's records and should not be used for information that may change yearly. Unlike lists, fields do not have drop-down choices but simply a blank field. An example of something you might track in a field is Auditorium Size. An example of ID is Employee ID #. There are five open fields and four open IDs.
a list of organization statistics you want to track	assist you when setting up the user-defined statistics fields in Statistics. The Organizations module has unlimited statistics fields to track statistical organization information. Make a complete listing of statistics you want to track and gather the statistical information for all organizations within your organization. An excellent source of possible statistics is information from your Annual Report. When you receive the Organizations module, some statistics fields may be predefined. You can change the predefined statistics fields if you desire.

Organizations Setup and Maintenance

In the Organization Setup area, you can choose settings for using the Organizations module, set up PIN numbers, and activate the Organizations Changes Log.

You can also define lists and items such as staff positions, staff levels, and organization levels.

Defining Lists in Organizations

Using Define Lists, you can set up your available fields, list items, dates, and positions.

One of the first but most important steps of setting up ACS Organizations is setting up organization levels. These levels structure organizations in the module, and once an organization is attached to a level, that level cannot be changed. This step is crucial, so we recommend gathering organization information and even planning your organization level hierarchy on paper before entering this information in ACS.

After setting up organization levels, you can set up dates, fields, and lists in Define Lists, and you can also set up staff information, such as staff positions, position levels, and statuses.

- Setting up Organization Levels
- Defining Open Dates, Fields, and Lists in Organizations
- Setting up Staff Statuses
- Setting up Staff Positions
- Setting up Staff Position Levels

Setting up Organization Levels

Use Define Lists to set up the different levels of your organization. These levels structure your organizations, so when adding organizations, start from the top and work down. We strongly recommend planning your organizations levels on paper prior to setting them up in ACS, along with gathering information about the organizations and what you want to track.

Once an organization is attached to a level, you **cannot** change the level. This protects the organizational structure. You can only edit the level's description or delete organization levels that are no longer in use and do not have organizations associated with them.

Examples of Organization Levels

Here are some examples of Organization levels. While these specific examples may not work for your specific organization, they can serve as a guide of how to set up levels from the top down.

Example 1: Lutheran General Body
The different levels of a Lutheran General Body could be set up as:

- General Body
- Synod
- Congregation

Example 2: The Presbyterian Church
The different levels of a PCUSA Synod could be set up as:

- Synod
- Presbytery
- Churches/Congregations

To add organization levels

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Organizations**.
4. Select **Levels**, and click **Add**.
5. In the **Field Description** field, enter the name of the new level (up to 20 characters).
6. **Optional:** To add more levels, select **Add Another**.
7. Click **OK**.

To edit an organization level description

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Organizations**, then select **Levels**.
4. In the **Levels** pane, select the organization level to edit, then click **Edit**.
5. In the **Field Description** field, edit the description and click **OK**.

To delete an organization level

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Organizations**, then select **Levels**.
4. In the **Levels** pane, select an organization level and click **Delete**.

Defining Open Dates, Fields, and Lists in Organizations

ACS Organizations contains several open dates, fields, and lists that you can customize and define. This lets you track additional information about organizations. There are four IDs, five fields, and five dates you can use to track important additional information.

For example, your organization wants to track the Homecoming date and the date of inception. Select a previously undefined date field and customize for Homecoming. Do the same thing for Date of Inception. These dates are customized in Define Lists.

When you define the date fields in one organization, the fields are automatically defined in all other organizations. You only have to define these fields once.

Accessing Define Lists on the Fly

You can access the Define Lists window from the Additional Fields tab. Under **Dates**, **Lists**, **IDs** or **Fields**, select the **Not Defined ID**, **Date**, **List**, or **Field** you want to use, and click. It becomes a hyperlink and takes you directly to the Define Lists window.

This lets you know exactly where the information you are setting up displays on the Additional Fields tab. You must also have the proper security rights to use this option.

To define dates, IDs, fields, and lists in ACS Organizations

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Organization**, expand **Dates**, **Fields**, **or Lists.**
4. Select a **Not Defined Date, Field, or List** to assign a name to and click **Activate Field**.
5. In the **Field Description** field, enter a description.

Defining Dates

In many areas of ACS, information is listed in alphabetical order. When defining date fields, you may want to start each with "Date of". For example Date of Homecoming, Date of Inception.

By putting "Date of" in front of all dates, they are all listed together rather than the homecoming date being in the "h's" and inception date being in the "i's".

6. Click **OK**.

Additional Field Information

Fields

This is a tree view of the open fields, lists, dates, and positions that you can define.

Groups Setup

Click to access the Group Setup window. Use an Activity Group rather than a user-defined field when you want the ability to assign more than one element to an organization for a field. For example, if you set up your committees as a user-defined list, then you could assign an organization to only one committee in the list. If you set up your committees in Activities, you can assign the organization to all committees it is a part of.

Print

Click to print the People Fields List, which lists the **Field Type**, **Description**, and **Elements** for all user-defined fields.

Deactivate Field

Click to deactivate a field and clear its value from all records. This option is available if the field has been activated.

Activate Field

Click to activate a field and define its value. This option is available if a field has not been activated.

Change Description

Click to change a field description. This option is available if the highlighted date field or list has a description.

Move Up

Click to move a position up a level in the position hierarchy. This option is available if the **Positions** level is selected under **Staff**.

Move Down

Click to move a position down a level in the position hierarchy. This option is available if the **Positions** level is selected under **Staff**.

Add
Click to add an item.

Edit
Click to change the names of fields, lists, dates, and positions.

Delete
Delete a list item.

Setting up Staff Statuses

After setting up staff positions and levels, you can set up staff statuses, such as full time and part time.

To add staff statuses

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Staff**.
4. Select **Status**, then click **Add**.
5. In the **Field Description** field, enter the status you want to add.
6. Click **OK**.

To edit a staff status

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Staff** and select **Status**
4. In the **Status** pane, select the status you want to edit, then click **Edit**.
5. In the **Field Description** field, edit the description and click **OK**.

To delete a staff status

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Staff**, then select **Status**.
4. In the **Status** pane, select a status and click **Delete**.
5. When the confirmation message displays, click **Yes**.

Setting up Staff Positions

Before entering specific organizational data concerning staff or statistics, you need to define staff positions and position levels. Use these positions and position level designations when entering staff members for an organization.

You must enter staff positions before you can add position levels.

To add staff positions

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Staff**.
4. Select **Positions**, then click **Add**.
5. In the **Field Description** field, enter a name for the position.
6. **Optional:** If you have position codes for different staff positions, in the **Position Code** field, enter the code.
7. Click **OK**.

To edit a staff position

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Staff** and select **Positions**
4. In the **Positions** pane, select the position you want to edit, then click **Edit**.
5. In the **Field Description** field, edit the description and click **OK**.

To delete a staff position

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Staff**, then select **Positions**.
4. In the **Positions** pane, select a position and click **Delete**. You cannot delete a staff position with a position level that is in use.
5. When the confirmation message displays, click **Yes**.

Setting up Staff Position Levels

Position Levels help give more definition to the Positions you create. For instance, you have a Position of "Minister" and then associate "ordained", volunteer", and "interim" Position Levels with the Position.

When you add an individual and assign "Minister" as position, you can also choose the correct level (ordained, volunteer, or interim). You can associate Position Levels with Positions using the Assign Position Levels option or by copying a position level. Copying staff position levels from one position to another reduces the time spent entering staff information.

Before you can associate Position Levels with Staff Positions, you must enter them in Define Lists.

To add position levels

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Staff** and select **Position Levels**.
4. Click **Add**.
5. In the **Field Description** field, enter a description.
6. **Optional:** To add more levels, select **Add Another**.
7. Click **OK**.

To copy a position level

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Staff**, and then expand **Positions**.
4. Select **Position Levels**.
5. In the **Position Levels** pane, select the position level that you want to copy to another position.
6. Drag-and-drop the position level on top of the position that you want in the **Fields** pane.

To edit a position level

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Under **Fields**, expand **Staff**.
4. Select **Position Levels**.
5. In the **Position Levels** pane, select a position level and click **Edit**.
6. In the **Field Description** field, edit the description and click **OK**.

To delete a position level

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

3. Under **Fields**, expand **Staff**.
4. Select **Position Levels**.
5. In the **Position Levels** pane, select a position level and click **Delete**. You cannot delete a position level that is in use.
6. When the confirmation message displays, click **Yes**.

Working with Organizations Settings

On the **Organization Settings** tab in Organizations Setup, you can set up default newsletter, statement, and e-mail options, as well as organization level and PIN options. You can also set up duplicate name checking.

To set up organizations settings

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. In the Organization Setup window, on the **Settings** tab, select the default options. To learn more about each option, see the Additional Field Information below.
4. When finished, click **OK**.

Additional Field Information

Default Send Newsletter
Select the default method of sending a newsletter when adding a new organization record.

Default Send Statement
Select the default method of sending a statement when adding a new organization record.

Default E-mail Type
Select the default e-mail type when adding a new organization record. For example, work or home.

Enforce Organization Hierarchy
Select to have records adhere to the parent-child level hierarchy you have set up in Define Lists. For example, if you have set a Church level as the parent of a Mission record, a Mission cannot be the parent of a Church. If this option is not selected, the records do not have to adhere to the parent-child hierarchy. For example, a Mission level could be the parent of a Church record.

Allow Unaffiliated Organizations
Select to allow organizations to be added without a parent organization.

Use PIN as Envelope Number
Select to use the organization's Personal Identification Number as the envelope number in all future records.

Copy PIN to Envelope Number
Click to overwrite each existing organization's envelope number with its PIN. If no envelope number exists, this process copies the PIN to the Envelope Number field in the Add Organization window. Only valid numbers are copied.

Create a Backup

This process overwrites data. ACS Technologies recommends that you create a backup before clicking this button.

Print Invalid PIN Report

Click to print a list of records that have invalid PINs.

Duplicate Name Checking Settings

Select a setting to help prevent creating duplicate records. The available settings are:

- **None** — Select if you do not want to check for duplicates when adding a new organization.
- **Name Only** — Select if you only want to compare names when checking for duplicates. If you add a new organization whose name matches the name of an existing organization in your data, a window displaying the existing organization's name, reference name, city, and address appears.
- **Name & City** — Select if you want to compare names and cities when checking for duplicates. If you add a new organization whose name and city match the name and city of an existing organization in your data, a window displays the existing organization's name, reference name, city, and address.
- **Name, City, & State** — Select if you want to compare names, cities, and states when checking for duplicates. If you add a new organization whose name, city, and state match the name, city, and state of an existing organization in your data, a window displays the existing organization's name, reference name, city, and address.

Setting up Organization PINs

In Organizations Setup, you can set up organization PINs.

A PIN is the number assigned to an organization for record keeping capabilities. Each organization has its own PIN and is tracked by this number. You can perform searches using the PIN or use it with envelope numbers when posting contributions.

Before setting up PINs, decide if you want to use your PIN as your envelope number. Your PIN and Envelope Number can be the same number, or you can choose separate numbers for each.

Notes

If you have already set up Envelope Numbers to be different from the PIN, but now want to have the Envelope Number match the PIN, click **Copy PIN to Envelope Number**. This ensures that all of your PINs and Envelope Numbers match.

If there are any invalid PINs (PINs containing any characters other than numbers), click **Print Invalid PIN Report** to print a list of the invalid numbers.

To configure organizations to use the same PIN and envelope number

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. On the **Settings** tab, under **Organization Settings**, select **Use PIN as Envelope Number**.
4. Click **OK**.

To configure organizations to use different PIN and envelope numbers

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. On the **Settings** tab, under **Organization Settings**, clear the **Use PIN as Envelope Number** checkbox.
4. Click **OK**.

Working with the Organizations Changes Log

The Organization Changes Log is an Organization report that lists the details of changes made to organization records. You can filter, print, or sort this grid report, which is helpful if you have questions about who made what changes to a specific record.

The report displays the name of the organization whose record was changed, the date and time the change was made, the username of the individual who made the change, and the type of change that was made. Only changes to the organization name, address, e-mail address, or phone number are tracked.

You can also clear the entire Organizations Changes Log or clear changes for a specific date range.

To activate the Organization Changes Log

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

To print the Organization Changes Log

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. In the upper sidebar, expand **Lists**.
4. Select **Organization Changes Log** and click **Customize**.
5. On the **Report Options** tab, select the options you want to include in the report.
   - **Name Options** — Select to print the organization name or the reference name.
   - **Include Deactivated Organizations** — Select to print organizations that are deactivated.
   - **Print PIN** — Select to print the PIN for all selected organizations.
   - **Custom Sort (Alpha)** — Select to sort in alphabetical order.
   - **Use Date Range** — Select to display entries within a date range. In the drop-down lists, select the from and to dates.
   - **Use Last Search Results** — Select to print based upon you last search results.
6. To view the report, click **Preview**.
7. Click **Print Report** .

Adding and Editing Records in ACS Organizations

The Find Organization window is the main area for tracking details about the churches and organizations you work with. In this window, you can add new organizations, view and edit organization records, print organization profiles, and generate a mail merge letter to organizations. You can also filter the window to display similar organizations.

Adding an Organization

You can add an organization by selecting **Add an Organization** on the Workbench menu or clicking **Add New Organization** in the Find Organization window.

When adding organizations, add the highest level organization first. Add all organizations in descending order from the highest level to the lowest level. Each organization (except for those on the highest level of the organization hierarchy) must have a parent organization unless you selected **Allow Unaffiliated Organizations** in Organization Setup. Enter at least one organization on each level of the hierarchy to get started.

After adding an organization, you can enter the organization's other information on the various tabs in View/Edit Organization.

To add an organization

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Add an Organization** and click **Go** .
3. Enter the necessary information for the organization. To learn more about the fields, see the **Additional Field Descriptions** below.
4. When finished, click **OK**.

Additional Field Descriptions

Name Information

- **Organization Level** — Select a level for the organization in the drop-down list.
- **Parent** — Select the parent for the organization.
- **Reference Name** — Enter the name by which the organization is commonly referred. For example, First Baptist Church of Alabama might be called FBCA.

Organization Primary Address

- **Company** — If the organization has its offices in another company's building, select and enter the name of the company.
- **Geo Zone** — Enter a geographic zone or select one from the drop-down list.
- **Sub Zone** — Enter a sub zone or select one from the drop-down list. A sub zone represents an area within a geographic zone such as a community or a subdivision.
- **Map Page** — This is a map code used in conjunction with a third-party mapping software. If your mapping software has this capability, use the map code in ACS to plot the location of the organization on a map.
- **Map X and Map Y** — Enter the organization's coordinates.

Organization Information

- **PIN** — Enter a **PIN**, or to select the next available number, click **Next #**.
- **Env #** — Enter an envelope number, or to select the next available number, click **Next #**. If you do not want to use the PIN as the envelope number, **Next #** assigns the next available envelope in the database.
- **Tier** — Select the tier with which to group the organization. You can use a tier as a way to group organizations geographically, such as by Zone, Region, or Deanery. This list is defined in Define Lists.
- **Send Newsletter** — Select the method for which a newsletter is to be delivered to the organization.
- **Contributor Status** — Select if this organization is active, inactive, or not a contributor to your organization.
- **Send Statement** — Select to send contribution statements to this organization.

Additional Information

- **Web Address** — Enter the organization's Web address.
- **E-mail Address** — Enter the organization's e-mail address. The e-mail type for the e-mail address you enter is the default e-mail type defined in the Organization Setup window.
- **Notes** — Enter a description of the organization or additional information
- **Key Note** — To have the note display for the organization before the View/Edit Organization window opens, select **Key Note**. For example, you can use the Key Note as a means to notify the user of an important note concerning the organization.
- **Add Another** — To enter another organization, select **Add Another**.

Changing an Organization's Affiliation

If an organization is no longer affiliated with other organizations, you can change their affiliation status. For example, if a church separates from its mother church, you can break the affiliation record.

You can also change an organization's parent information or change a parent organization to unaffiliated.

> **Note**
>
> An unaffiliated organization cannot be the parent or the child of another organization.

To change parent information

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Profile** tab, in the **Parent** field, click **Lookup** and select a parent for the organization.
5. Click **OK**.

To change an affiliated organization to unaffiliated

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want unaffiliated and click **View/Edit**.
4. In the **Parent** field, click **Lookup** .
5. Click **Set to Unaffiliated**.
6. Click **OK**.

To change a parent organization to unaffiliated

1. In the Find Organization window, click **Filter**.
2. Under **Available Fields**, select **Parent**, then click **Add**.
3. Under **Filter Type**, select **Equal To**.
4. In the **Parent** field, click **Lookup** .
5. Select the parent organization.
6. Click **OK**, then **Apply**.
7. Select the child organization, then click **View/Edit**.
8. In the **Parent** field, click **Lookup** .
9. Under **Show Results for**, select **All**.
10. Select a new parent organization.
11. Click **OK**, **OK**, and then **Close**.
12. In the Find Organization window, select the organization you want unaffiliated and click **View/Edit**.

13. In the **Parent** field, click **Lookup** .
14. Click **Set to Unaffiliated**, then **OK**.

Changing an Organization's Level

You can change the level for an organization. Once an organization has a sub-organization (a lower-level organization assigned to it), you cannot change the level of the parent organization. This applies only if the **Enforce Organization Hierarchy** option is selected in Organization Setup.

For more information about Enforce Organization Hierarchy, see Working with Organizations Settings.

To change an organization's level

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Profile** tab, in the **Organization Level** drop-down list, select a level.
5. Click **OK**.

The Find Organization Window

A number of tools and options are available in the Find Organization window. The center grid area displays the organizations in your database. You can point to an organization, use the scroll bar, use the page up, page down, home, and end keys to navigate the list.

You can also enter an organization name, reference name, PIN, or city, in the **Enter** field at the top depending upon what you have selected in the **Search By** section at the bottom of the window.

To open an organization's record, select the organization name and click View/Edit, double-click on the name, or press enter when the name is selected. Click **Add New Organization** to enter a new record to your ACS database.

To print an organization profile summary of key data in the organization's record, click **Print Profile**. To launch the ACS Mail Merge feature, click **Letter**.

The **Show Results for** options provide a way to select a subset of names to display in the center grid, based on a filter or a search. To access filtering in the Find Person window, click **Filter**. To set up searches, click **Searches** on the Organizations menu.

To access an organization's information

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. In the Find Organization window, using a variety of methods , you can select the organization you want to work with.
    - Enter the organization's name into the selection box at the top.
    - Point with your mouse arrow to a name in the grid area.
    - With your cursor in the grid area, on your key board use the Page Up or Page Down, the up/down arrows, and the Home/End keys or use the scroll bar to find the name you're looking for.
4. With the organization selected, click **View/Edit**.

Customizing the Find Organization Window

You can use the Customize window to select the fields to display next to an organization's name in the Find Organization grid. You can also use the Customize window to choose how to search for and locate organizations in the Find Organization window.

To customize the Find Organization window

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. In the Find Organization window, right-click inside the grid, then select **Customize**.
4. In the Customize window, select the appropriate options on the **Grid** and **Options** tabs. The selections you make are stored by user name and don't affect the settings of other ACS users in your organization.
5. When finished, click **OK**.

Additional Field Information

The options available in the Customize window are on two main tabs: **Grid** and **Options**.

The Grid Tab

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

Settings

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

Fields

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

The Options Tab

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

Selection Mode

- **Locate** — Select to locate names in the Find Organization window by scrolling to the letters of the first name of the organization as you enter them in the selection field. For example, if you want to quickly locate the record for University Church, begin entering the organization's name in the selection field. When you type the letter U, the selection arrow moves to the first organization in the list whose name begins with the letter U. When you enter the N, the selection arrow moves again to the first organization in the list whose name begins with the letters U-N, and again with the I, and so forth. If you see that the selection arrow displays next to the organization you want, you can press **Enter** or click **View/Edit** to open the record.
- **Search** — Select to narrow down the list of organizations based on your search criteria. You can enter as many letters as you need for the name, and all matching records display. For example, if you enter "Main", all organizations whose names begin with "Main" display, including Main Street Church and Main Office. Once your results display, you can select the organization and press Enter on your keyboard to access the record.
- **Include City/Address/Phone** — Select to include the city, address, and phone number as search fields. When you choose this option, selection boxes labeled City / Address and Phone display in the Find Organization window. You can enter as many numbers and/or letters as needed for the address or phone number. If you search by address, and the matching record has family members associated with it, the records for all family members display. This option is only available when you select **Search** as the Selection Mode.
- **Include PIN** — Select to include the PIN as a search field. When you select this option, a selection box labeled PIN displays in the Find Organization window. You can enter a PIN, and the matching record displays. This option is only available when you select **Search** as the Selection Mode.
- **Use Search for Prior/Next** — Select to cycle through the results returned in a search or filter according to what you enter in the Name field. You can cycle through records by clicking Prior and Next while viewing a record in the View/Edit Organization window. To view records not included in the search, clear this option.

Sort List By

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

- **Name** — Select to sort the list of organizations alphabetically by name.
- **Reference Name** — Select to sort the list of organizations alphabetically by reference name.
- **PIN** — Select to sort the list of organizations by PIN in ascending order.
- **City** — Select to sort the list of organizations by city. This option is only available when you select Search as the Selection Mode.

Settings

- **Show Sort/Filter Options** — Select to display the Sort List By and Show Results For options below the Find Organization grid.
- **Shift to Edit mode after add** — Select to automatically access the Add/Edit Organization window after entering a new organization. This option can help save valuable time if you want to enter additional information immediately after adding a new organization.
- **Show Address** — Select to display the highlighted organization's address in the area below the Find Organization grid. You can display the organization’s Primary Address or Meeting Address. When selecting fields to display on the Grid tab, remember that the primary address can also be viewed in the Find Organization window by right-clicking on a highlighted name.

Viewing and Editing an Organization's Record

After adding an organization, you can enter the organization's information on the tabs in the View/Edit Organization window. This window lets you track the organization's contact information, such as addresses, phone numbers, and e-mail addresses, affiliates, staff members, statistics, sponsors, groups, connections, and comments. You can also upload documents or pictures on the organization's record.

To get started, select a tab below:

- The Profile Tab
- The Addresses Tab
- The Additional Fields Tab
- The Contact Information Tab
- The Primary Affiliates Tab

- The Affiliates Tab
- The Staff Tab
- The Statistics Tab
- The Statistics Views Tab
- The Comments Tab

- The Sponsors Tab
- The Groups Tab
- The Connections Tab
- The Document Library Tab
- The Picture Tab

To view and edit an organization's record

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. In the View/Edit Organization window, click on the tab you want to view or edit.
5. Make the changes you want, then click **OK** to save them.

The Profile Tab in Organizations

The **Profile** tab displays important information about an organization, such as the organization's PIN, envelope number, tier, language, newsletter status, year established, contributor status, web address, notes, and statement status. The tab also displays the organization's primary address and phone number and primary contact.

In addition, you can view the organization's entry date, the date the organization last contributed, and the date the organization's record was updated on the **Profile** tab.

You can change most information on the **Profile** tab, but there are a few exceptions.

- You must change an organization's primary contact on the **Staff** tab.
- You must change an organization's primary address on the **Addresses** tab.
- You cannot change an organization's level if **Enforce Organization Hierarchy** is selected in Organizations Setup. Once an organization has a sub-organization (a lower-level organization assigned to it), you cannot change the level of the parent organization.

When you (or someone in your organization) make changes to an organization's record, you can click **View Change Log** to view a grid that displays the change, the username of the staff member or volunteer who made the change, and the date and time the information was changed. You can also filter and sort this grid.

To enter or change an organization's profile information

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Profile** tab, click in a field and make the necessary changes.
5. Click **OK**.

The Additional Fields Tab in Organizations

The **Additional Fields** tab contains user-defined fields that you can customize to meet the needs of your organization.

Think of the additional categories and lists as the questions you want to ask, and the options as the answers. You can set up your questions in Define Lists, and on the **Additional Fields** tab, you can enter or select your answers.

You can set up lists, IDs, fields, and dates. Some examples of items to track include the organization's primary language, EIN (Employer ID Number), or date of inception.

If specific information you track about an organization on the **Additional Fields** tab is no longer correct, you can change the information. For instance, you have a **List** set up called **# of Members**. The drop-down has choices such as Under 500, 501-1000, 1001-1050, etc. One organization listed in your ACS database has grown and their description needs to change from 501-1000 to 1001-1050.

Editing Descriptions on the Fly

A quick way to edit the descriptions of any of your open dates, open categories, or open fields is to click the field you want to edit when you are in an organization's record.

The field opens in the Define Lists window. You must have the correct security clearance to work in Define Lists.

To add additional information for an organization

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Additional Fields** tab.
5. Add the necessary information in the fields and click **OK**.

To change a field description

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Additional Fields** tab.
5. Click a list, field, ID, or date name.
6. In the Define Lists window, click **Change Desc.**.
7. In the **Field Description** field, enter a field description, then click OK.

To edit additional information

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Additional Fields** tab and make the changes you want.
5. Click **OK**.

Additional Field Information

Lists
This additional list stores information when there is a limited number of possible entries. The entries for categories are defined in and selected from a list. These entries are called list items or elements. An example is: Type Church: Metropolitan, Rural, and Suburban.

Field
This additional list stores information when there are unlimited, possible entries. The entries for fields are not selected from a list, but are typed in. An example is Auditorium Size.

Date
This additional list stores the date of a particular event. Dates can be typed in or selected from the drop down calendar. An example is: Date of Inception 00/00/0000.

The Addresses Tab in Organizations

On the **Addresses** tab in View/Edit Organization, you can add, edit, and delete an organization's addresses. After adding addresses, you can specify address types, which is helpful if an organization meets at a different location or an organization's primary or mailing addresses are different (for example, if the organization receives mail or statements at a P.O. Box).

When you change an organization's address, ACS automatically updates the **Org Type** address for each Staff Member linked to the Organization. To view a grid listing address changes, click **View Change Log** .

You can also map the address of any organization in your organizations module. This function opens a Web page and uses the address information entered into organizations to display a street map of the selected organization, which is useful if you are planning to visit an organization.

If you'd like a printable list of all addresses for the organization, click **Print** to display this list, which also includes the type of address, if applicable.

To add an organization's address

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Addresses** tab, then click **Add**.
5. Enter the information for the organization's address, then click **OK** to save the address.
6. To save additions, click **Close**.

To set up address types

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Addresses** tab.
5. Under **Active Addresses**, in the **Primary**, **Meeting**, **Mailing**, and **Statement** drop-down lists, select the appropriate addresses.

   > **Tip**
   >
   > If you'd like to rename these address types or add new ones, place your cursor over the name of the address type, then click the hyperlink to go to Define Lists.

6. When finished, click **OK**.

To edit an organization's address

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Addresses** tab.
5. Select an address to change and click **Edit**.
6. Make any necessary changes and click **OK**.

To delete an organization's address

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Addresses** tab.
5. Select an address and click **Delete**.
6. When the confirmation message displays, click **Yes**.

To map an organization's address

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Addresses** tab, then select the address you want to map.
5. To open a Web page that creates a street map for the selected organization address, click **Map Address**.
6. To return to Organizations, close the Web page.

The Primary Affiliates Tab in Organizations

The **Primary Affiliates** tab houses records of individuals who are often associated with the organization. On this tab, you can add, change or clear primary affiliations associated with the selected organization.

If an individual is the primary affiliate for another organization in your ACS database, use the change option (For example, if the individual moves from the Regional Office to the State Office). If the individual is no longer affiliated with the organization, use the clear option.

An individual can be on an organization's staff, but can only be a primary affiliate for one organization. You can also view or edit primary affiliates on the **Affiliates** tab.

To add an affiliate

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click on the **Primary Affiliates** tab, then click **Add an Affiliate**.
5. Select the individual you want to add, or click **Add New Family** to add a record to your ACS database.
6. When finished, click **OK**.

To change an affiliation

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. On the **Primary Affiliates** tab, select the individual whose primary affiliation you want to change, and click **Change Affiliation**.
5. In the **New Primary Affiliation** field, click **Lookup** .
6. Select an organization, and click **OK**.

To clear a primary affiliation

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click on the **Primary Affiliates** tab.
5. Select the individual, and click **Clear Affiliation**.
6. When the confirmation message displays, click **Yes**.

The Affiliates Tab in Organizations

On the **Affiliates** tab, you can view an organization's primary contact, staff members, group information, and primary affiliates. This saves time, since you don't have to click on each tab to view the information. You can also add staff members and primary affiliates on this tab.

Under **Staff** and **Groups**, you can also view an organization's staff members or affiliates' groups as of an effective date by selecting the date in the **Effective Date** drop-down list.

For example, if you need to know which staff members worked at an organization last year, or need to know their positions or position levels as of last year, you can select the appropriate date from last year in the **Effective Date** drop-down list, and the grid automatically updates with the information as of that date. To view all past and present staff members or groups, select **Show All**.

To add a staff member

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. On the **Affiliates** tab, right-click inside the **Staff** grid and select **Add**.
5. When the Add/Edit Staff window displays, enter or select the appropriate information, then click **OK**.

To view an organization's staff members

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click on the **Affiliates** tab.
5. To display staff members as of a certain date, select the **Effective Date** in the **Staff** dialog box. By default, the grid displays staff members as of the current date.
6. To edit a staff member's **Start Date**, **Position**, **Position Level**, **Status**, or mailing information, double-click on the staff member's record on the grid. The Add/Edit Staff window will display.
7. To display all staff members, including those who may have retired, moved, or left the staff, click **Show All**.

Positions and Position Levels

If a staff member's **Position** or **Position Level** changed, the staff member is listed twice when you select **Show All**. Each of the staff member's positions display with the appropriate **Start Date** and **End Date**.

To view an affiliate's groups

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click on the **Affiliates** tab.
5. To display groups as of a certain date, select the **Effective Date** in the **Groups** dialog box. By default, the grid displays groups as of the current date.
6. To display all affiliates' groups, including those in which the affiliate is no longer a member or has rotated off, click **Show All**.
7. To print a list of group members, right-click inside the **Groups** grid and select **Print**.

To add a primary affiliate

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click on the **Affiliates** tab.
5. Right-click inside the Affiliates grid and click **Add an Affiliate**.
6. In the Find Person window, select the individual who you want to add as an affiliate, then click **OK**.

Clearing Primary Affiliations

If the selected individual is a staff member of another organization, you must clear the individual's primary affiliation on the **Staff Positions** tab before adding them as a primary affiliate for another organization.

To edit an affiliate's primary affiliation

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click on the **Affiliates** tab.
5. Under **Affiliates**, double-click on the record of the affiliate you want to edit. The Add/Edit Staff window displays.
6. In the **New Primary Affiliation** field, click **Lookup** .
7. In the Find Organization window, select the individual's new affiliation and click **OK**.
8. Click **OK** to return to the **Affiliates** tab.

The Staff Tab in Organizations

Staff members are the people who work in an organization and hold positions. Examples include pastors, volunteers, and administrators. After you add an organization's record, enter the organization's staff. You can keep an organization's staff information for an unlimited number of years. The **Staff** tab tracks the organization's staff and user-defined statistics.

A primary contact is the liaison for the organization who you correspond with, and you can select or change this person on the **Staff** tab.

> **Note**
>
> The Organizations module interfaces with the People module to facilitate entry of staff data. If you change an organization's address, the Organization Address for all staff members linked to that organization automatically reflects the new address.

To add a staff member

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Staff** tab, select an **Effective Date** for which you want to enter staff, then click **Add**.
5. In the **Name** field, click **Lookup** .
6. If the staff member already has a record in Organizations, select the individual and click **OK**. If the staff member does not have a record, click **Add New Family** and enter a new record.
7. Enter the appropriate information for the staff member and click **OK**. To learn more about these fields, see the Additional Field Information below.

To change a staff member's information

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the staff member's organization and click **View/Edit**.
4. On the **Staff** tab, select the staff member whose record you want to change and click **Edit**.
5. Change the necessary information for the staff member and click **OK**.

To delete a staff member

Be Careful

By using this option, you permanently delete the staff member and all of their relevant information from the Organizations module. They still exist in the People module. A better option might be to use the Resign option. The individual is no longer on the organization's staff but his/her information if still available.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the staff member's organization and click **View/Edit**.
4. On the **Staff** tab, select a staff record and click **Delete**.
5. When the confirmation message displays, click **Yes**.

Additional Field Information

Staff Information

- **Start Date** — Select the date the staff member began. By default, the **Effective Date** displays.
- **Name** — Click **Lookup** ... to select an individual from the Find Person window in the People module.
- **Position** — Select the staff member's position from the drop-down list. You can set up positions in Define Lists.
- **Position Level** — Select a position level, defined for the selected position, from the drop-down list. You can set up position levels in Define Lists.
- **Status** — Select the employment status of the staff member.
- **Notes** — Enter notes or extra information for the staff member.
- **Ordained** — Select if the staff member is ordained, and enter the date he or she became ordained.
- **Licensed** — Select if the staff member is licensed, and enter the date he or she became licensed.
- **Lay Staff** — Select if the staff member is associated with the church, but is not a member of the clergy.
- **Primary Affiliation** — Select to verify the current organization as the staff member's primary affiliation.

Mail To

- **Primary Affiliation** — Select to copy the organization's address to the individual's record and set the address as the staff member's mailing address.
- **Individual Address** — Select to set the staff member's home address as their mailing address.

Staff Mail To

Use Staff Mail To to select which address or addresses display when printing Staff Labels, Staff Mailing Directory, Staff Mailing Records, Staff Names and Special Fields.

Position Organization

Select to display all addresses of organizations for which the individual holds a position. If you select **Position Organization**, under **Staff Mail To**, the organization's address and phone number print on the Staff Mailing Directory report, the Staff Mailing Records report, and the Staff Names and Special Fields report and export.

Individual Address

Select to display the individual's address.

Working with an Organization's Primary Contacts

The Primary Contact is your liaison with the organization, and the individual's name displays on both the **Profile** and **Staff** tabs. Before you can add a primary contact, the individual must already be a staff member for that organization.

After adding staff members, you can select an organization's primary contacts on the **Staff** tab. You can also change primary contacts or remove an employee's name as the primary contact. This means that the employee no longer is the primary contact for the organization.

To select a staff member as the primary contact

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose primary contact you want to set and click **View/Edit**.
4. On the **Staff** tab, select a staff member and click **Set Primary Contact**.
5. When the confirmation message displays, click **Yes**, then **OK**.

To clear the primary contact

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose primary contact you want to clear and click **View/Edit**.
4. On the **Staff** tab, click **Clear Primary Contact**.
5. When the confirmation message displays, click **Yes**, then **OK**.

To change the primary contact

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose primary contact you want to change and click **View/Edit**.
4. Click on the **Staff** tab.
5. Select the name of the staff member you want to change to the primary contact and click **Set Primary Contact**. If the person you want to make the primary contact is a new staff member, follow the procedure for adding a staff member and then select the staff member as the primary contact.
6. When the confirmation message displays, click **Yes**.

The Contact Information Tab in Organizations

The **Contact Information** tab tracks phone numbers, e-mail addresses, and social media information for an organization, including the organization's Access ACS login e-mail address. You can also select the organization's primary address phone and meeting address phone, if the organization meets in a different place, and view the organization's Access ACS logins.

You can add an unlimited number of phone numbers and e-mail addresses to an organization's record.

To add a phone number

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organization** and click **Go** .
3. Select an organization and click **View/Edit**.
4. In the View/Edit Organization window, click the **Contact Information** tab.
5. Under **Phones**, click **Add**.
6. To select the **Phone Type**, click the drop-down list defined in Define Lists.
7. Enter the phone number, whether it is listed or unlisted, and the extension (if applicable).
8. Click **OK**.

To add an e-mail address

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Contact Information** tab, in the **E-mail Addresses** area, click **Add**.
5. Enter the information for the e-mail address.
   - **E-mail Type** — Select a type of e-mail address from the list.
   - **Listed/Unlisted** — Select whether an e-mail address is listed or unlisted.
   - **E-mail Address** — Enter an e-mail address. The e-mail address can be up to 50 alphanumeric characters.
   - **Preferred E-mail Address** — Select if the organization prefers to be contacted at this e-mail address.
   - **Set as Access ACS Login E-mail** — Select to use this e-mail address as the organization's Access ACS e-mail login.
6. Click **OK**.

To add or edit a social media address

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose social media address you want to add or edit and click **View/Edit**.
4. Click the **Contact Information** Tab.

5. Under **Social Media**, click **Add** or **Edit**.
6. In the Add/Edit Social Media window, enter the necessary information.
    - **Link Type** — In the drop-down list, select the type of social media address you are adding or editing. To edit this field's values in Define Lists, place your cursor on **Link Type** and click the hyperlink.
    - **Listed** — Select if the social media address you are adding or editing is listed.
    - **Unlisted** — Select if the social media address you are adding or editing is unlisted. By default, unlisted addresses do not print on reports.
    - **Address** — Enter the organization's social media address. Be sure to enter this in the form of a Web address, not the organization's user name on the social media site. The URL is limited to 100 characters. For example, when adding ACS Product Development's twitter account, enter http://twitter.com/acsproductdev, rather than acsproductdev.
7. When finished, click **OK**.

To change a phone number or e-mail address

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose phone number or e-mail address you want to change and click **View/Edit**.
4. On the **Contact Information** tab, select a phone number or e-mail address and click **Edit**.
5. Change the necessary information and click **OK**.

To delete a phone number or e-mail address

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose phone number or e-mail address you want to delete and click **View/Edit**.
4. On the **Contact Information** tab, select a phone number or e-mail address and click **Delete**.
5. When the confirmation message displays, click **Yes**.

To view and add the organization's Access ACS login e-mail

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

The Statistics Tab in Organizations

Use the **Statistics** tab to track statistical information for each church or group in the Organizations module.

Before you enter statistics, you need to configure what you track on each page. There are unlimited user-defined Statistics fields on these pages. The Statistics fields are flexibly designed to enable you to track various types of statistical information for your organization. For example, you can use the Statistics fields to track membership, attendance, baptism, special service membership, and contributions.

Some Statistics fields are predefined for your convenience. You can edit the predefined fields and you can also configure your statistics field information to suit your needs. The headings display and calculate statistics in many different ways.

You can view statistical information on both the **Statistics** and **Statistics Views** tabs but there are differences in how you use these tabs.

To get started tracking organizational statistics, see the pages below:

- Setting up Pages and Fields in Organizations Statistics
- Entering Organizations Statistics
- Statistics vs. Statistics Views in Organizations

Setting up Pages and Fields in Organizations Statistics

Before you can track statistical information and enter statistics, you'll need to set up the Statistics pages and fields in ACS Organizations.

Viewing the predefined fields may help give you ideas on how you want to set up Statistics. An excellent source of possible statistics is information from your Annual Report. You may want to create a rough outline of want you want to track in Statistics before you do the set up work.

Some statistics fields are predefined, but you can customize others. To track similar information, set up a statistics field Page.

If the information you want to track changes, you can edit statistics fields or define new fields to track additional information. Other tips include putting similar information on the same page, creating headers to make it easy to find information, and using Total Fields to have ACS calculate the sum or multiple fields.

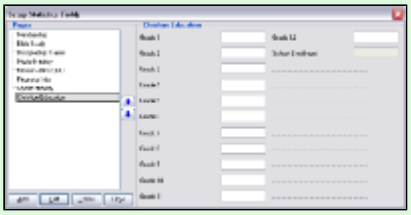
If you need to delete a field, you can right-click on it to delete it.

For example

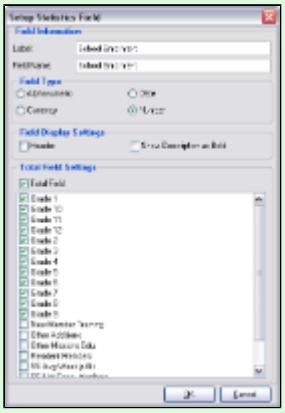
You could set up a page titled **Christian Education** to track Sunday School Enrollment.

If using grades, set up a **Number** field for each grade, 1-12 (A total of 12 fields). Then, set up a **Total Field** called School Enrollment and select to include each Grade field you set up.

After you enter enrollment for all of the grades and click **Calculate Totals**, the field displays your total school enrollment.



Setting up a Page for Christian Education



Setting up a Total Field for School Enrollment

To configure predefined statistics pages and fields

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Statistics** tab, click **Setup**.
5. Under **Pages**, select a page.
6. In the right pane, click on a field name or a dotted line.
7. Under **Field Information**, enter a **Label name**. This displays on the **Statistics** and **Statistics Views** tabs.
8. Enter a **Field Name**. This displays on reports and graphs.

9. Under **Field Type**, select the type of field you want this to be. To learn about the types, see the Additional Field Information below.
10. Under **Field Display Settings**, select the appropriate settings for this field.
11. If this is a total field, under **Total Field Settings**, click **Total Field** and select the appropriate fields.
12. Click **Close**.

To define a new statistics page and fields

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Statistics** tab, click **Setup**.
5. Under **Pages**, click **Add**.
6. Enter a **Page Description**, then click **OK**.
7. In the right pane, click on a dotted line to define a field.
8. Under **Field Information**, **Field Type**, **Field Display Settings**, and **Total Field Settings**, enter the appropriate information or select the appropriate option. To learn more, see the Additional Field Descriptions below.
9. When finished, click **OK**.
10. Repeat steps 7-9 to define other statistics fields. When finished, click **Close** to return to the **Statistics** tab.

To edit statistics fields

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Statistics** tab, click **Setup**.
5. Click on the **Statistics** field you want to edit.
6. Make the appropriate changes, and click **OK**.

To delete statistics fields

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Statistics** tab, click **Setup**.
5. Right-click on the field you want to delete, then click **Delete Field**.

To delete a page

Be Careful

Deleting a page deletes the page and all fields from the page.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Statistics** tab, click **Setup**.
5. Under **Pages**, select the page you want to delete, then click **Delete**.
6. When the confirmation message displays, click **Yes**.

Additional Field Descriptions

Field Information

- **Label** — Enter the description of the statistics heading as you want it to appear in your statistics table.
- **Field Name** — Enter the name of the statistics heading.

Field Type

- **Alphanumeric** — Select to make the field accept both numbers and letters as statistical data.
- **Currency** — Select to make the field accept only currency.
- **Date** — Select to make the field accept only dates.
- **Number** — Select to make the field accept only numbers. This field must be selected for a Total Field because it uses numbers exclusively.

Field Display Settings

- **Header** — Display a description as a header or category for a group of statistical information.
- **Show Label as Bold** — Select to display the description in bold letters.

Total Field Settings

Select **Total Field** to display the field as a total field. A total field calculates the sum of the totals for the statistical fields you select. Select each statistical field you want calculated in the total.

Entering Organizations Statistics

After you've set up your Statistics pages and fields, you can enter statistics for the organizations in ACS.

First, select the **Year** in the drop-down list, or click **Add Year** to add pages for a new year. Then, select the **Page** in the drop-down list. You can also use the **Next Page** button to scroll through the pages of statistics for that organization.

When you enter numbers that are summed in a Total Field, the total updates as you enter text. As you enter information on fields and pages, ACS automatically saves your entries.

To enter Organizations Statistics

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the appropriate organization and click **View/Edit**.
4. Click on the **Statistics** tab.
5. In the **Year** drop-down list, select the year for which you want to add information. If the year is not in the drop-down list, click **Add Year** to add it.
6. Enter the information in the available fields. To scroll from page to page, select a page in the **Page** drop-down list, or click **Previous Page** and **Next Page** at the bottom of the window.
7. When finished, click **OK**.

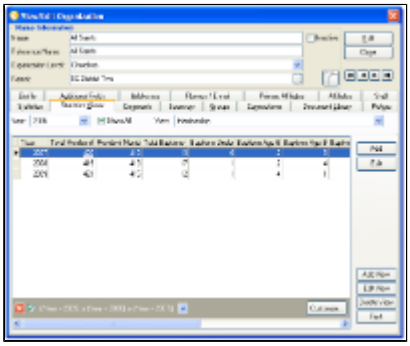
Statistics vs. Statistics Views in Organizations

Statistics and Statistics Views share information. In other words, if you change a statistics value on the **Statistics Views** tab, that change is reflected on the **Statistics** tab, and vice versa.

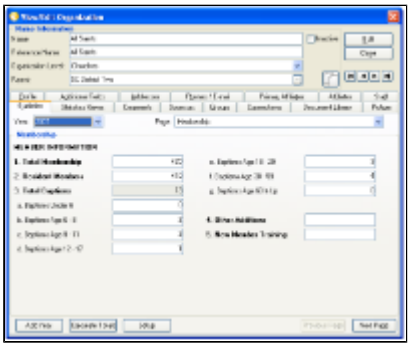
Although Statistics and Statistics Views pull information from the same place, they can be used differently. In Statistics, you view information on customized pages. In Statistics Views, you view information based on the view someone set up. Examples of views are financial information, enrollment totals by choir (pre-school, children's, youth, adult, handbell).

Look at the **Statistics Views** tab below. Notice the Total Baptisms and Total Membership fields for 2007. Now, look at the **Statistics** tab below. Notice that the numbers for Total Baptisms and Total Membership are the same in both graphics. The data for both Statistics Views and Statistics is the same data presented in two different ways.

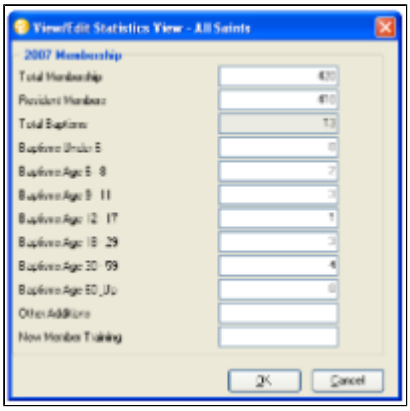
Look at the Edit Statistics graphic below. If you click **Edit** on the **Statistics Views** tab and change the number in the Total Membership field, that change is also reflected on the **Statistics** tab view.



Statistics Views Tab



Statistics Tab



Edit Statistics

To access the Statistics and Statistics Views tabs

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click on the Statistics or Statistics Views tab.

This chart explains the differences in Statistics and Statistics Views.

Capabilities	Statistics	Statistics Views
Adding New Statistics Information	Yes	Yes
Editing Existing Statistics Information	Yes	Yes
Setting Up New Statistics Fields	Yes	No
Printing	No	Yes
Graphing	Yes	Yes
Exporting to Excel	No	Yes
Exporting to HTML	No	Yes
Viewing Statistics From More than One Tab at a Time	No	Yes
Viewing Statistics for Multiple Years	No	Yes
Viewing Statistics for a Selected Year	Yes	Yes

The Statistics Views Tab in Organizations

You can track a large amount of statistics for each organization, but sometimes you want to view only specific areas. Use **Statistics Views** to customize the statistics to view selected fields.

In **Statistics**, information is grouped by page. Use **Statistics Views** to group and combine specific fields from multiple pages. For example, if you have a Membership page, a Bible Study page, a Discipleship Training page, and a Music Ministry page, and each page includes fields that are age specific (e.g. Age Birth - 5, Age 6 - 11, etc.), with **Statistics Views**, you could set up a view to show all of the statistics for Membership, Bible Study, Discipleship Training, and Music Ministry for people between the ages of Birth and 17.

On the **Statistics Views** tab in the View/Edit Organization window, you can:

- Set up Statistics Views
- Add and edit Statistics information
- Filter Statistics Views to view information for multiple pages, years, or a selected year
- Print Statistics information
- Graph Statistics information
- Export Statistics information to an Excel (.xls) file or an .html file

Adding and Editing Fields in Statistics Views

After setting up Statistics Views, you can add new statistics information or edit existing information. You can also do this on the **Statistics** tab, and any changes you make are reflected there as well.

To add statistics information for a view

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to add statistics for and click **View/Edit**.
4. On the **Statistics Views** tab, in the **Year** drop-down list, select the year for which you want to add information. To display all years for which you have statistics the selected view, select **Show All**.
5. Click **Add**.
6. Enter the information in the available fields and click **OK**.

To edit statistics information for a view

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click on the **Statistics Views** tab.
5. In the **Year** drop-down list, select the year for which you want to edit information. To display all years for which you have statistics for the selected view, select **Show All**.
6. Click **Edit**.
7. Make the necessary changes in the available fields, and click **OK**.

Setting Up Statistics Views in Organizations

Statistics Views let you view statistics information based on customized views that you set up. On the **Statistics Views** tab, you can set up new Statistics Views or edit or delete existing ones.

To add a Statistics View

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Statistics Views** tab, then click **Add View**.
5. On the **Options** tab, in the **View Name** field, enter the name of the view. For example, if you want to create a view that only includes information on Baptisms, enter "Baptisms."
6. Click the **Grid** tab.
7. Under **Settings**, select the options for the grid.
    - **Auto Size Column Width** --- Select to automatically resize the columns to the maximum width of the grid.
    - **Show Grid Lines** — Select to display grid lines between records in the grid.
    - **Use Column Filtering** — Select to apply a filter to the data that displays in the grid. Click the **Down** arrow to filter on a single value in the column, or click the **Custom** option to filter on multiple criteria.
8. Under **Fields**, select the fields you want to display in the grid.
9. **Optional:** Use the **Up** and **Down** buttons to arrange the fields in the order you want them to display in the grid.
10. Click **OK**.

To edit a Statistics View

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. In the View/Edit Organization window, click the **Statistics Views** tab.
5. In the **View** drop-down list, select the view you want to edit, and click **Edit View**.
6. On the **Grid** tab, under **Settings**, select the options for the grid.
    - **Auto Size Column Width** — Select to automatically resize the columns to the maximum width of the grid.
    - **Show Grid Lines** — Select to display grid lines between records in the grid.
    - **Use Column Filtering** — Select to apply a filter to the data that displays in the grid. Click the **Down** arrow to filter for a single value in the column, or click the **Custom** option to filter for multiple criteria.
7. Under **Fields**, select any fields you want to add, or clear any fields you no longer want in the view.

8. **Optional:** Use **Move Up** and **Move Down** to arrange the fields in the order you want them to display.
9. Click **OK**.

To delete a statistics view

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click the **Statistics Views** tab.
5. In the **View** drop-down list, select the view you want to edit, and click **Delete View**.
6. When the confirmation message displays, click **OK**.

Filtering Statistics Views in Organizations

You can apply a filter to a statistics view to further customize the information that displays. This could be helpful if you want to see which fields are blank over several years so that you can enter statistics information for them.

You can also set up a custom filter to view statistics information by. For example, you may want to see the statistics for the years 2004 through 2009, but do not want to view each year at a time or display all years' statistics.

> **Enabling Column Filtering**
>
> If column filtering is not activated, right-click inside the grid, select **Customize**, and select **Use Column Filtering**.

To apply a filter to a statistics view

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose statistics you want to filter and click **View/Edit**.
4. Click the **Statistics Views** tab.
5. In the **View** field, select the view you want to display.
6. Next to the field you want to filter for, click the drop-down arrow, and then select the value you want to filter for.
7. To remove the filter from the statistics view, click **Close** at the bottom of the window.

To set up a custom filter

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose statistics you want to filter and click **View/Edit**.
4. Click on the **Statistics Views** tab.
5. In the **View** drop-down list, select the view you want to display.
6. Next to the heading you want to filter for, click the arrow, and then select **Custom**.
7. Select the **Operator** and enter the Value you want to filter for. For example, if you are filtering for **Year** and you want to see statistics for **2008**, select equals as the **Operator**, and type **2008** as the **Value**.
8. **Optional:** Select **And** or **Or** and enter additional criteria for the filter.
9. Click **OK**.

Graphing Statistical Views Information

You can use your Organizations statistics fields to create Detail and Multi-Year graphs. You can also graph by statistical years to track trends.

> **Note**
>
> Graphing options are available for integer and currency fields only. Detail graphs are available for total fields only.

To Print a Statistical Views Graph

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to graph statistics for and click **View/Edit**.
4. On the **Statistics Views** tab, select a **Year**.
5. Right-click in the field you want to graph and select **Detail Graph** or **Graph by Years**.
6. Under **Chart Options**, select the options you want.
7. Click **Print**.

To Create a Statistical Graph by Years Graph

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose statistics you want to graph and click **View/Edit**.
4. Click on the **Statistics Views** tab.
5. Right-click the heading of the statistical field you want to graph, and click **Graph by Years**.
6. In the **Available Years** column, select the years you want to graph for.

Additional Field Information

Graph Options

- **Detail** — Print a graph of the information for the selected year. Detail graphs are available for Total fields only.
- **Multi Year** — Print a graph of field data for all years available.
- **Selected Years** — Print a graph of field data for all the years selected.

Chart Options

- **Line** — Create a line graph. Line graphs are helpful for tracking how data such as membership numbers changes over time.
- **Bar** — Create a bar graph. Bar graphs are helpful for comparing groups of data for analysis.
- **Pie** — Create a pie graph. Pie charts are helpful for showing groups of data in proportion to the whole data set.
- **Rotate** — To rotate the graph, use the up and down arrows and select the degree of rotation.
- **Solid Colors** — Click to view the graph using solid colors instead of lined colors.
- **Monochrome** — Click to view the graph using shades of gray instead of colors.
- **3D** — Print a graph in three dimensions.

Graph Buttons

- **Print** — Click to print the graph.
- **Save to File** — Click to save the graph as a .bmp file.

Printing and Exporting Statistical Views Information

You can print a statistics view or export it to a Microsoft® Excel® or HTML document.

When you print a statistics view, the information displays just as it does on the grid. When you export to Excel, all fields are configured in Excel as General fields so you can edit them. When you export to HTML, you cannot edit the fields unless you open the file with a program that allows editing of .htm files or you right-click on the document and click **View Source**.

To print a statistics view

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to print statistics for, then click **View/Edit**.
4. Click on the **Statistics Views** tab.
5. In the **Year** drop-down list, select the year for which you want to view statistics. To display all years for which you have statistics in the selected view, select **Show All**.
6. In the **View** field, select the view you want to display.
7. Click **Print**.
8. Click to print.

To export a Statistics View to an Excel or HTML document

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to export statistics for, then click **View/Edit**.
4. Click on the **Statistics Views** tab.
5. In the **Year** drop-down list, select the year for which you want to view statistics. To display all years for which you have statistics, select **Show All**.
6. In the **View** field, select the view you want to display.
7. Right-click the grid, and click **Export to Excel** or **Export to HTML**.
8. Enter a file name and click **Save**.

The Groups Tab in Organizations

The Activities tools in ACS are a great help for tracking committees, skills, talents, and participation opportunities within your organization. For example, University Church is involved in two Organization-Church Ministries activities, Crisis Closet and Deaf Ministry. You could track that involvement on the **Groups** tab.

ACS provides tremendous flexibility in setting up activity groups. Each activity must be associated with a category. In addition, there are three elements that can further detail the activity. All are user-defined. Only Element 1 is required to be used. In addition to elements, there are options for comments, dates, and numbers.

Activities can also provide a historical record for which organizations have served in different capacities. How much history you keep is up to you. ACS does not limit the detail you can keep.

The **Groups** tab displays the activity groups in which an organization is participating and allows you to add the organization to new groups, edit the activity record, or delete the activity item. You can also print a list of activities.

Activities are set up in Group Setup. Before setting up your activities, it is helpful to lay out your structure on paper to make sure it is logical and makes sense.

To add an activity for an organization

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Add Organization to a Group** and click **Go** .
3. Select the organization, and click **View/Edit**.
4. Click **Add**.
5. In the **Master Group** drop-down list, select the master group that includes the category you want.
6. In the left pane, select a category.
7. In the right pane, make the appropriate selections. Available choices depend on how the activity was set up.
8. Click **OK**, then **Close**.

> **Tip**
>
> You can also enter activities through Quick Entry.

To change an activity

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Groups** tab and select an activity and click **Edit**.
5. Make the necessary changes and click **OK**.

To delete an activity

We suggest you delete an organization activity only if you added the activity to the organization by mistake. When you delete an activity from an organization, all of that activity's history is deleted. If you use the Drop option, the history is kept, but the activity doesn't display under the organization unless you check the Show All box.

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Groups** tab.
5. Select an activity and click **Delete**.
6. When the confirmation message displays, click **Yes**.

To print a list of activities for an organization

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click the **Groups** tab.
5. Right-click in the grid to **Print List**, **Print Detail**, or **Print Grid**.

Using Quick Entry for Organizations Activities

Quick Entry is an easy and fast way to add activities to an organization. Once you become familiar with the categories found in each Master Group, Quick Entry for Activities can save you time.

To use Quick Entry for activities

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Add Organization to a Group** and click **Go** .
3. Select an organization and click **View/Edit**.
4. Click **Quick Entry**.
5. In the drop-down list, select the appropriate **Master Group**.
6. Select the categories and elements you want to add, then click **OK**.

The Document Library Tab in Organizations

The **Document Library** tab is a tool you can use to keep track of files associated with a particular organization. You can create a document library for each organization within your database. Here are examples of different types of documents you would want to store in the Document Library:

- Monthly reminder letter of the monthly diocese meeting
- Welcome letter sent to all new churches in the organization
- Monthly organization newsletter
- Birthday letters sent to staff members

You can view any files associated with the organization if the document was created from the Document Library (Word or Excel), or you used the **Load from File** option to associate PDF, PowerPoint, or other files with the Library. The options available for files differ depending on the application. For instance, you may have different options for a Word file than you have for an Excel file. The options are determined by the application in which the file was created, not by ACS.

When viewing a document in the Document Library, you cannot edit the document from that window. You can open documents from the Document Library if the application in which the document was created is loaded on your workstation. Documents created in the Document Library are saved in the acsdata/acsrpts directory.

- Creating or Importing Documents for the Organizations Document Library
- Editing and Deleting Documents in the Organizations Document Library

Creating or Importing Documents for the Organizations Document Library

You can create a new Microsoft® Word document or Microsoft® Excel worksheet for an organization from the Document Library. You can also import a file to include in the document library.

After creating or importing these documents, you can open them and edit them as necessary.

To create a new Microsoft Word or Excel document

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

To import a document by loading from a file

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

Editing and Deleting Documents in the Organizations Document Library

After creating or importing your document, you can open it to view the contents or make any changes.

You can also delete documents you no longer need. The document is deleted from the Documents window and from the acsdata/acsrpts directory.

To open a document from the ACS Document Library

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. Click the **Document Library** tab.
5. Under **Documents**, select the document you want to open.
6. Click **View** or **Edit**.

To delete a document from the Document Library

1. Under Manage Records, click the Organizations tab.
2. In the drop-down list, select View/Edit Organizations and click Go .
3. Select the organization and click View/Edit.
4. Click the Document Library tab.
5. In the grid, select the document you want to delete, then click Delete.
6. When the confirmation displays, click Yes.

The Picture Tab in Organizations

On the **Picture** tab in View/Edit Organization, you can upload a picture to an organization's record. For example, you could upload an organization's logo or a picture of an organization's members or building, if applicable. Once a picture is uploaded, you can view it in ACS People Suite and in Access ACS.

Using Add/Edit Pictures, you can configure your image editing software to work with ACS so that you can edit and save pictures without having to upload them again. If you want to use the organization's picture in another document, you can even export the picture to your computer's hard drive or your church's network drive. You can also print the picture on the Organization Profile report.

To add an organization's picture

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Picture** tab, click **Add**.
5. When the Add/Edit Pictures window displays, click **Import**.
6. Select the picture you want to add from your computer or network and click **Open**.
7. In the Add/Edit Picture window, click **Close**. Once you close the window, the picture you added displays on the **Picture** tab.

To edit an organization's picture

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. If you have not already done so, configure your image editing software to work with ACS.
5. On the **Picture** tab, click **Edit**.
6. In the Add/Edit Pictures window, click **Edit**. Your image editor will open, displaying the picture.
7. In your image editing software, make the desired changes to the picture and click **Save**.
8. In the Add/Edit Pictures window, click **Refresh** to display the edited picture.

To delete an organization's picture

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Picture** tab, click **Delete**.
5. When the confirmation window displays, click **Yes**.

To export an organization's picture

1. Under Manage Records, click the **Organizations** tab.

2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Picture** tab, click **Edit**.
5. In the Add/Edit Pictures window, click **Export**.
6. Select a location to save the picture on your hard drive or network, then click **Save**.

To print an organization's picture on the Organization Profile report

> **Note**
>
> This option is unavailable if **Edit Organization** is set to **None** in Add/Edit Users.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. In the upper sidebar, expand **Directories** and select **Organization Profile**.
4. Click **Customize**.
5. On the **Report Options** tab, under **Organization Report Options**, select **Print Pictures**.
6. Select any other options you want to include, then click **Preview**.

When your Organization Profile report displays in the Preview pane, the organization's picture will display just above the **Additional Fields** area.

Configuring and Editing an Organization's Picture

You can edit an organization's profile picture using your image editing software without exiting ACS. For example, if you notice that individuals in an organization's picture have red eyes, you can correct the red eyes in the picture from within ACS, without having to export the picture, correct the redeye, and import the edited picture.

Before editing an image, you must first configure your image editing software for each user who works with pictures, but you'll only need to do this once. When you've configured your image software, you can edit any organization's image. When you click Edit, the image will automatically open in your image editing software. Configuring your image editing software involves selecting your software's executable (.exe) file in ACS.

To configure your image editing software with ACS

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Picture** tab, click **Edit**.
5. When the Add/Edit Pictures window displays, click **Configure**.
6. In the **Image Editor Executable** field, click **Lookup** .
7. Navigate to the folder where your image editing software is stored, select the executable (.exe) file, and click **Open**.
8. In the Configuration window, click **OK**.

The Connections Tab in Organizations

In the Organizations module, the **Connections** tab links with the Connections module so that information does not have to be re-entered. You must have the Connections module in order for the **Connections** tab to display.

The **Connections** tab provides a method to track contacts made to your organization's events by individuals and organizations. It also tracks contacts made from your organization to individuals and organizations. Connections can be used for tasks you may not typically think of for the module. For instance, you can use Connections to track a ministerial candidates process. Using the **Connections** tab, you have a complete system for recording and tracking information to assist your organization with providing a successful outreach/inreach Ministry.

The first step of using Connections is adding organizational contacts. You can add both inward (within your organization) or outward (from outside of your organization) contacts.

Once you add contacts, you can select callers or teams (set up in Connections Define Lists) who make the contacts you added. You can assign individual callers to make contacts, or you can assign a team of callers to make contacts. Then, you can track responses, which are reactions to the contact or information learned from the contact.

If you use Connections often, you may want to set up and assign templates for frequent contacts.

To get started, click on one of the pages below:

- Working with Organizational Contacts
- Working with Callers on the Organizations Connections Tab
- Working with Responses on the Organizations Connections Tab
- Working with Templates on the Organizations Connections Tab

Working with Organizational Contacts

Adding contacts is the first step of using Connections for Organizations. Once you add contacts, you can add callers or teams who complete the contact and responses to denote the organization or contact's reaction.

You can also make an inquiry into a contact. Inquiry links the Organizations module with the Connections module in order for you to view a calendar of contacts for a month.

To add an organizational contact

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Add Connection** and click **Go** .
3. Select the organization you want to add a contact for, then click **View/Edit**.
4. On the **Connections** tab, click **Add**.
5. On the **Details** tab, enter the information for the contact.
   - **Inward** — Select if the contact is within the organization.
   - **Outward** — Select if the contact is to another organization or outside of your organization.
   - **Date** — Select a date in which the contact is taking place.
   - **Type** — Select a type for the contact. Types are set up and defined in the Connections module using Define Lists, which you can access by placing your cursor on **Type**. When it becomes a hyperlink, click on it. You must have the correct security clearance for the hyperlink to display.
   - **Open Category** — This is a user-defined category that you can tailor to suit your organization.
   - **Comment** — Enter a comment or additional information about the contact.
6. To select callers for the contact, click **Select Caller**. In the left pane, select an individual and click Add . Repeat this step to select all the individuals you want as callers for this contact and click **Close**. You can also select a team for the contact. To select a team, click **Select Team**.
7. Select a team from the drop-down list and click **OK**.
8. Click **OK**.

> **Tip**
>
> You can save time by assigning a template to a contact.

To edit an organizational contact

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose contact you want to edit and click **View/Edit**.
4. On the **Connections** tab, select a contact and click **Edit**.
5. Make the necessary changes and click **OK**.

To delete an organizational contact

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose contacts you want to delete and click **View/Edit**.
4. On the **Connections** tab, select a contact and click **Delete**.
5. When the confirmation message displays, click **Yes**.

To inquire about a contact

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose contacts you want to inquire about and click **View/Edit**.
4. Click on the **Connections** tab.
5. To view a calendar of contacts for an organization, click **Inquiry**.

To print an organizational contact report

1. Under Manage Records, select the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose contacts you want to print and click **View/Edit**.
4. Click on the **Connections** tab.
5. Click **Print** to display a list of contacts in the Print Preview window.
6. Click **Print** .

Working with Callers on the Organizations Connections Tab

Callers are the people who make the contacts that you are tracking. They are selected from the People database. You can assign individual callers to make contacts, or you can assign a team of callers to make contacts. Caller Teams are set up in **Define Lists**.

In order to add callers to a contact, you must have a contact already added. After adding a contact, you can assign callers to it. If you have added a caller to a contact and then the caller cannot be a part of a contact for whatever reason, you can remove the caller from the contact.

After the callers make a contact, you can enter responses for the contact.

To assign callers to a contact

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to assign callers for and click **View/Edit**.
4. On the **Connections** tab, select the contact to add callers to and click **Edit**.
5. Click **Select Callers**.
6. Select an individual from the database list on the left and click **Add** to move the name to the **Selected Callers** List on the right.
7. Repeat step 6 to add more individuals, then click **Close**.
8. In the Add/Edit Contacts window, click **OK**.

To remove a caller from a contact

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose callers you want to remove and click **View/Edit**.
4. On the **Connections** tab, select a contact you want to remove a caller from and click **Edit**.
5. Under **Assigned Callers**, highlight the caller you want to remove.
6. Click **Delete Caller**.
7. Click **OK** twice.

Working with Responses on the Organizations Connections Tab

Responses are the reactions to the contacts by the person or group being contacted. Responses can also be types of information learned from the contacts. Some examples include new resident, hearing impaired, or request contact with a pastor. These responses can help you track new or prospective members, special needs and requests, and friends of your organization.

Once the caller(s) or team completes the contact, the responses from that contact can be entered. The responses you choose from are set up in Define Lists. You can remove a response to a contact after it has been entered.

> **Outward Contacts**
>
> When entering an outward contact, the **Responses** tab does not display until you complete the contact by selecting **Complete**.

To select responses to contacts

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose responses you want to work with and click **View/Edit**.
4. On the **Connections** tab, select a contact and click **Edit**.
5. Click the **Responses** tab (The contact must be complete before the **Responses** tab is available).
6. Under **Available Responses**, select the responses.
7. Click **OK**.

To remove a response to a contact

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select an organization and click **View/Edit**.
4. On the **Connections** tab, select a contact and click **Edit**.
5. Click the **Responses** tab.
6. Under **Available Responses**, clear the responses you want to remove.
7. Click **OK**.

Working with Templates on the Organizations Connections Tab

Templates are tools you can use for setting up contacts that are used most often. It is an easy format that has already been arranged for you. Contact templates are set up in the Connections module, but can be accessed and used from the **Connections** tab in the View/Edit Organization window.

Often, contacts with your organization follow a pattern or schedule. You can set up a template to help you record these scheduled contacts. You can enter one classification and record all the predefined scheduled contacts for you. Contact templates can assign certain standard task schedules for following up on a contact.

To assign a template for a contact

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Add Connection** and click **Go** .
3. Select the organization you want to assign a contact template for and click **View/Edit**.
4. On the **Connections** tab, click **Add**.
5. Click **Select Caller** or **Select Team** to select an individual or a team to make a contact.
6. To add a caller, select an individual in the left pane and click **Add**. Click **Close**. To select a team, from the drop-down list, select a team and click **OK**.
7. Click **Assign Template**.
8. Select a template from the drop-down list and click **OK**.
9. When the confirmation message displays, click **OK**.

The Sponsors Tab in Organizations

Sponsors are established churches and organizations that help new churches and/or missions get started. Sponsors may provide help for new organizations by providing financial assistance, staff, building space, mentoring services, and more.

Sponsor information, including the Sponsor's Name and Relationship, is stored on the **Sponsors** tab in the organization's record. On this tab, you can add a new sponsor to an organization's record or edit existing sponsor information. You can also delete sponsor information from an organization's record.

Relationship is a user-defined field. To add relationship types, in the Add/Edit Sponsored By Records or Add/Edit Sponsors Of Records window, click the **Relationship** hyperlink or press the **Insert** key after clicking in the drop-down list.

To add or edit a sponsor of an organization

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. On the **Sponsor** tab, under Sponsored by, click **Add** or **Edit**. The Add/Edit Sponsored By Records window displays.
5. In the **Start Date** field, enter a date. When adding a sponsor, by default the **Effective Date** displays.
6. **Optional:** In the **End Date** field, enter a date.
7. To select the sponsor organization, in the **Sponsor** field, click **Lookup** .
8. Select an organization and click **OK**.
9. Select a **Relationship** from the drop-down list defined in Define Lists.
10. **Optional:** To enter extra information about this sponsorship, use the Notes field.
11. Click **OK**.

To add or edit a sponsored organization

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. On the **Sponsors** tab, under Sponsors of, click **Add** or **Edit**. The Add/Edit Sponsors Of Records window displays.
5. In the **Start Date** field, enter a date. When adding a sponsored organization, by default the **Effective Date** displays.
6. **Optional:** In the **End Date** field, enter a date.
7. To select the sponsored organization, in the **Sponsored Org** field, click **Lookup** .
8. Select an organization and click **OK**.
9. In the drop-down list, select a **Relationship**.
10. **Optional:** To enter extra information about this sponsorship, use the **Notes** field.

11. Click **OK**.

To delete a sponsor

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization and click **View/Edit**.
4. On the **Sponsors** tab, select the sponsor you want to delete, then click **Delete**.
5. When the confirmation message displays, click **Yes**.

The Comments Tab in Organizations

Comments are pieces of information you want to keep track of, but that cannot be contained in a list or field. You can enter any text in a comment, such as directions to an organization, any special circumstances, etc. You can select a comment type and date for each comment.

You can set up Comment Types in People Define Lists. Examples of comment types include Church Facility, Directions, Camp Sponsorships, etc. You can also select Comment Dates, which automatically default to the current date.

To add a comment

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to add a comment for and click **View/Edit**.
4. On the **Comments** tab, click **Add**.
5. Enter the information for the comment.
    - **Comment Date** — Enter the appropriated comment date or select a date from the drop-down list. The current date is the default.
    - **Comment Type** — Select how you want to categorize different types of comments from the drop-down list.
    - **Comment** — Enter the comments you want to display for the chosen Comment Type. The comment length is unlimited.
6. Click **OK**.

To change a comment

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose comment you want to change and click **View/Edit**.
4. On the **Comments** tab, select a comment and click **Edit**.
5. In the **Comment** field, change the comment. Or, select a new date or comment type.
6. When finished, click **OK**.

To delete a comment

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization whose comment you want to delete and click **View/Edit**.
4. Click on the **Comments** tab.
5. Select a comment and click **Delete**.
6. When the confirmation message displays, click **Yes**.

Working with Filters in Organizations

Filters are used to create a subset of your database. For example, you can create a filter to show only the organizations established in a particular year, and then you can use this filter as you work with Organization records so your Find Organization window displays only those organizations.

You can save filters and use them again without having to recreate the specifications each time, which is very useful when printing reports. You can access filters in the Find Organization window.

Creating Filters in Organizations

You can use filters to limit the records that display in the Find Organizations window.

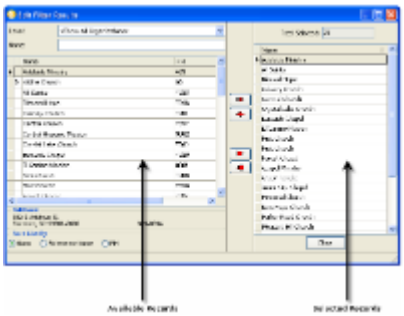
After creating a filter, you can use the Edit Filter Results window to add or remove organizations from filter results, which is helpful for reporting purposes. You can also print the filter results or save and load the filter for future use.

To create a filter

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. In the Find Organization window, click **Filter**.
4. **Optional:** Enter a description for the filter in the **Filter Description** field.
5. **Optional:** In the **Filter Date** field, select the desired date for the filter. This option affects date related filters. For example, if it's July and you want to know all organizations that will be 20 years old or older as of September 1, set the filter date to 9/1. Then, when you select **Date of Inception - Age** to 20, your filter returns the appropriate organizations.
6. Under **Available Fields**, select the field you want to filter for, then click **Add**.
7. Select the appropriate filter options for your selection and click **OK**.
8. Repeat the previous steps to include additional filter fields.
9. Click **Apply**. The filter results display in the Find Org window.

To edit filter results

1. After the filter is applied, under **Show Results For** in the Find Organization window, click **Edit**.
2. To add an organization record to your results, select a record from the left pane and click **Add** . To remove an organization record from your results, select a record from the right pane and click **Remove** .
3. Repeat this step to add the organization records you want to your results. To add all the records to your results, click **Add All** . To remove all the records from your results, click **Remove All** .
4. Click **Close**.



To view and print filter results

1. In the Edit Filters window, click **View Results**.
2. Click **Print**.
3. To print the filter results, click **Print** .
4. Click **Close**.
5. **Optional:** To apply the filter to your Organizations records, click **Apply Filter**.

Additional Field Information

Equal To
Select to have the value of the selected field in the returned records to equal the value you enter.

Not Equal To
Select to have the value of the selected field in the returned records to not equal the value you enter.

Range
Select to have the search return records with a range of values for the selected field. When you select **Range**, **Start Filter** and **End Filter** fields display. Enter the starting filter value and ending filter value for the range you want to filter for. For example, if you want to filter for records with Year Established in the range of 1990 through 1999, enter a **Start Filter** value of 1990 and an **End Filter** value of 1999.

Blank
Select to filter records for which the selected field is blank.

Not Blank
Select to filter for records with any value entered for the selected field.

Contains
Select to filter for records with values for the selected field that contain the text you enter in the Filter field. For example, if you want to filter for organizations that have the word Baptist in their name, select **Contains** as the Filter Type and enter Baptist in the **Filter** field.

Include in Results View
Select if you want the selected filter field to display in the View/Print Filter Results window.

Saving and Loading Filters in Organizations

You can save the filters you create so you can use them again later. A saved filter saves the criteria, not the results, so each time you load and apply a saved filter, you get results based on your current data. Saved filters can be **Private** (for your use only) or **Public** (for use by all ACS users in your organization).

If you have saved filters, you can load them instead of having to set them up each time you need the information.

To save a filter

1. Create the filter you want to save.
2. In the Edit Filters window, click **Save**.
3. In the **Title** field, enter a descriptive name for the filter.
4. Select **Public** if you want to share this filter with other ACS users.
5. Click **Save**.

To load saved filters

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations**, then click **Go** .
3. Click **Filter**, then **Load**.
4. Select the filter you want to use from the **Saved Filters** list, then click **Load**.
5. Click **Apply** to apply the selected filter to your Organizations records.

Related Topics

- Working with Filters in Organizations
  Creating Filters in Organizations
  Viewing and Editing an Organization's Record
  The Find Organization Window

Deleting and Deactivating Organization Records

You can delete an organization from your records if it does not have contributions transactions for the current year attached to it.

Deactivating an organization's record is a good alternative to deleting the record. Inactive organizations still exist in your ACS database, but records display in the Find Organization window with a **D** to the left of the name as a reminder that the record is deactivated.

> **Caution**
>
> Deleting an organization permanently erases an organization from your records. Unless you have the same organization entered twice, a better option may be to deactivate the organization.

To delete an organization

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **Delete Organizations** and click **Go** .
3. Click **Find Organization**.
4. Select an organization and click **OK**.
5. Click **Delete Selected**.
6. When the confirmation message displays, click **Yes**.
7. In the **Reason** field, enter a reason for the deletion and click **OK**.
8. When a message displays stating that all records for the organization have been deleted, click **OK**.

To deactivate an organization's record

1. Under Manage Records, click the **Organizations** tab.
2. In the drop-down list, select **View/Edit Organizations** and click **Go** .
3. Select the organization you want to deactivate, and click **View/Edit**.
4. Under **Name Information**, select the **Inactive** checkbox.
5. Click **Ok**.

Mass Changing Records in ACS Organizations

Mass Change provides a powerful tool for cleaning up, correcting, or changing data in your records. This feature is available for ACS People Suite and Organizations clients.

Two change modes are available in Mass Change. Your Change Mode selection determines which fields change and the window's appearance.

- **Change Field Value** — To replace the data in a selected field with new information, select this option. You can change records based on search results, filter results, or an entered value.
- **Move Field** — To move the data in a field to another location, select this option.

When you need it, Mass Change can be a terrific time-saver. However, if you don't use the feature properly, you can make a big mess. You can also limit user security settings so that only administrators have access to this feature.

Make a Backup

We recommend performing a manual backup before using the Mass Change feature. A current backup is the only way to be sure you can "undo" the changes in case of a mistake.

Organizations Reports

The Organizations module has many reports that you can print, preview, or export. Organizations reports contain information about your organizations, and some organizations reports interface with other modules in the ACS People Suite.

Each report type has many customization options, including the ability to print a report based on your last Search results. Because of these customization options, you can print each report in a variety of different ways.

We recommend experimenting with each report and examining the options available for each one.

The following report types are available in the Organizations module:

- Labels — You can print labels from the ACS Reports window.
- Connections — You can print various reports using information in the Connections module from the ACS Reports window.
- Contributions — You can print a variety of extracts, lists, statements, and statistics information in the Contributions module from the ACS Reports window.
- Directory — You can print several types of directories for your organization including a Document Library directory and Organization Profile.
- Extracts — You can extract information in a format that you can use with another software application.
- Lists — You can print a variety of lists from the ACS Reports window.
- Statistics — You can print various statistics reports from the ACS Reports window.

Organization Label Reports

You can print a variety of organization or staff labels from the ACS Reports window.

The following labels are available:

Report	Description
Create a New Max It! Mailing	To create a new Max It! mailing, click **Customize** and select the appropriate options on the Report Options tab. Then, click **Preview** to begin sorting your addresses for a Max It! bulk mailing.
Create a New Label Report	If your label type is not listed, click **Customize** to create a list of information in label format. You can select the information that prints and how many labels print per page.
Newsletter w/Primary Contact- Avery 5161 (2-Up)	Creates a list that includes the name and address of each organization's primary contact in label format. Two columns of labels print per page.
Org Labels w/Primary Contact- Avery 5161 (2-Up)	Creates a list that includes the organization's name, the name of the organization's primary contact, and the primary contact's address in label format. Two columns of labels print per page.
Organization Labels- Avery 4013 (1-Up)	Creates a list that includes the organization's label name, address, or other information from the organization's profile in label format. One column of labels prints per page.
Organization Labels- Avery 5160 (3-Up)	Creates a list that includes the organization's label name, address, or other information from the organization's profile, in label format. Three columns of labels print per page.
Organization Labels- Avery 5161 (2-Up)	Creates a list that includes the organization's label name, address, or other information from the organization's profile in label format. Two columns of labels print per page.
Organization Labels- Bulk Mail- Label Printer	Creates a list that includes the organization's label name, address, endorsement line, and/or a barcode, in label format. Labels are formatted one to a page for printing to a label printer.
Organization Labels- Bulk Mail- Label Printer (1-Up)	Creates a list that includes the organization's label name, address, endorsement line, and/or a barcode, in label format. Labels are formatted one to a page for printing to a label printer.

Report	Description
Organization Labels- Full Sheet	Creates a list in label format that includes the organization's label name and address on a single sheet. To move the label fields and change the margins to accommodate label sizes under 8.5 x 11, click **Customize**.
Organization Labels- Label Printer (1-Up)	Creates a list that includes the organization's label name and address in label format. Labels are formatted one to a page for printing to a label printer.
Staff Labels- Avery 4013 (1-Up)	Creates a list that includes the staff member's name and address in label format. The address that displays is determined by the selections in Add/Edit Staff. One column of labels prints per page.
Staff Labels- Avery 5160 (3-Up)	Creates a list that includes the staff member's name and address in label format. The address that displays is determined by the selections in Add/Edit Staff. Three columns of labels print per page.
Staff Labels- Avery 5161 (2-Up)	Creates a list that includes the staff member's name and address in label format. The address that displays is determined by the selections in Add/Edit Staff. Two columns of labels print per page.
Staff Labels- Bulk Mail- Avery 5161 (2-Up)	Creates a list that includes the staff members' name, address, an endorsement line, and a barcode in label format. The address that displays is determined by the selections in Add/Edit Staff. Two columns of labels print per page.
Staff Labels- Bulk Mail- Label Printer (1-Up)	Creates a list that includes the staff member's name, address, an endorsement line, and a barcode. The address that displays is determined by the selections in Add/Edit Staff. Labels are formatted one to a page for printing to a label printer.
Staff Labels- Full Sheet	Creates a list that includes the staff member's name and address on a single sheet. To move the label fields and change the margins to accommodate label sizes under 8.5 x 11, click **Customize**. To change the margins, click **Edit Layout** on the **Layout** tab.
Staff Labels- Label Printer (1-Up)	Creates a list that includes the staff members' name and address in label format. The address that displays is determined by the selections in Add/Edit Staff. Labels are formatted one to a page for printing to a label printer.
Staff Labels w/Primary Affiliation- Avery 5161 (2-Up)	Creates a list that includes the staff member's name, primary organization, and the organization's address. If a staff member's primary affiliation is not selected, the organization name does not display. Two columns of labels print per page.
Staff Labels with Org Name- Avery 4013 (1-Up)	Creates a list that includes the staff member's name, organization label name, and address in label format. The address that displays is determined by the selections in Add/Edit Staff. One column of labels prints per page.

Report	Description
Staff Labels with Org Name- Avery 5160 (3-Up)	Creates a list that includes the staff member's name, organization label name, and address in label format. The address that displays is determined by the selections in Add/Edit Staff. Three columns of labels print per page.
Staff Labels with Org Name- Avery 5161 (2-Up)	Creates a list that includes the staff member's name, organization label name, and address in label format. The address that displays is determined by the selections in Add/Edit Staff. Two columns of labels print per page.

Customizing Organization Labels

You can use the **Layout** and **Settings** tabs to customize Organization labels.

Use the **Layout** tab to select which fields and information display on your label, view label options, save and load label templates, and configure your labels for Basic Bulk Mail. Use the **Settings** tab to customize the information that prints on labels and the sort order.

To customize a label's layout and settings

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. Select the label you want to design and click **Customize**.
4. On the **Layout** and **Settings** tabs, select the desired options. To learn about the options, see the Additional Field Information below.
5. Click **Preview**.

Additional Field Information

The Layout Tab

Available Fields

The Available Fields list is a data tree that contains fields you can include in your label layout. To insert a field from the data tree into your label's layout, select it, hold down the mouse button, and drag it to the row, under **Label Layout**, where you want it to display. If you have user rights set to **None**, you can select the fields SSN (Social Security Number) and DOB (Date of Birth), but the information does not display on the labels.

Label Layout

Label Layout displays which fields will print or display on your label. You can drag and drop fields from the **Available Fields** list to use in your label layout. To clear a single line of the label layout, click **Clear Line** to the left of the row you want to clear.

- **Start Printing at Label** — This option is available for laser labels only. You can select a label to start printing on with this option. This is useful if you finish a label print job and have blank labels left over on a sheet. To start the next label print on the blank labels, select the number position of the first blank label. The remainder of the labels print as usual, beginning at the top of the second label sheet to the end of the print job. You can only select a valid label number. For example, if you are printing 2-up laser labels, you cannot start printing labels on the 21st label, because there are only 20 labels on the sheet. To determine the number of the label you want to start printing on, count across, not down.
- **Labels per Record** — Enter the number of labels to print for each record. This option is only available for laser labels.
- **Clear Label** — Click to clear all fields from the Label Layout. After you clear the label, you can add fields from the **Available Fields** list.
- **Print Sample** — Click to print a sample label using your layout and settings before printing your labels.

Label Options

This displays important selections you made on the **Settings** tab. To access the **Settings** tab and make changes, click **Make Changes**.

Label Template

You can save label layouts as templates and load saved templates.

Click **Load Template** to load a saved label template. The Label Layout associated with the selected label displays under Label Layout. If you want to save a label layout as a template, click **Save As Template**. For example, if you have a label layout that you use each month for your organization's newsletter, you can save it as a template for later use.

Basic Bulk Mail Options

Here you can access the Basic Bulk Mail Configuration window and the Postal Reports. These options are available only after selecting Basic Bulk Mail under Sort Order on the Settings tab. Click **Setup** to select the appropriate basic bulk mail configuration options. To access saved postal reports, click **Postal Reports**.

When using saved label settings for the first time, ACS recommends that you check your basic bulk mail settings to make sure they are correct before printing labels.

The Settings Tab

Record Selection

The Record Selection determines the types of records the information is gathered from. You can gather information from all organizations. Or, you can gather information from only those organizations who contribute, subscribe to your newsletter, are sponsors, or have staff members.

Organization Options
Select the level of the organizations you want to gather information from.

Address Options
Addresses are defined on the Addresses tab in the View/Edit Organizations window. Choose which address to print on labels from the address list. Select the address type you want to display for the organization records gathered. If an organization does not have the selected address type, the primary address displays. The address types available are primary, mailing, meeting, and statement.

Label Options

Select to print the labels in all uppercase letters, print bar codes on labels, or print a total count label for basic bulk mail. The total count label prints at the end of the label run.

Sort Order
Select the order to sort the exported records in from this section.

- **Alphabetical** — Sorts your labels alphabetically.
- **ZIP Code** — Sorts your labels by ZIP Code.
- **Custom** — Sorts your labels by a user-defined sort.
- **Basic Bulk Mail** — Sorts your labels for basic bulk mail. Click **Setup** to edit basic bulk mail settings in the Basic Bulk Mail Configuration window. To access saved postal reports for basic bulk mail, click **Postal Reports**.

Individual Options
Under **Label Name**, select to display an individual's formal or informal name. The **Formal** name displays an individual's title and full name, such as Mrs. Regina Brown. The **Informal** name displays an individual's goes-by name, such as Gina Brown.

Staff Options

- **Use System Date** — Select to gather the organization's current active staff information according to the current date.
- **Effective Date** — Select to gather the organization's active staff information according to an effective date
- **Select Staff Positions** — Select to gather the organization's staff information for select staff positions. To select the staff positions, click Select.
- **Include Label if No Position Exists** — Select to include labels for staff positions not filled. This process prints staff position titles on labels instead of individual names. For example, a label might read: Minister of Music, 3626 Springfield Dr., Denver, CO, 80202.

Use Last Search Results

Select to gather the information for the export from the results of the last search performed. Select **Include Individuals** to include individual records when printing labels (for example, if the individual record displays in Search).

Print Label Options

Click to print a list of the selections you made on the Settings tab.

Organization Connections Reports

You can print a variety of Connections list reports for organizations from the ACS Reports window.

The following reports are available:

Reports	Description
Assign To Listing	Creates a list of assigned individuals' names, addresses, and phone numbers, then prints the name of the individual, group, or individuals to whom the contact is assigned.
Connections Master Listing	Creates a list of all contacts for both individuals and organizations that are complete or incomplete. The list displays alphabetically by last name and grouped by family.
List of Connections By	Creates five main lists based on what is chosen in **Group** > **Select**. These selections are Connections by: Caller, Family/Individual, Contact Type, Age Group, or Primary Affiliation.

Organization Contributions Reports

The Contributions reports are based on information entered into the Contributions module. You can use them to show financial gifts and contributions for organizations in several different formats.

The following Contributions reports are available:

Extracts

Report	Description
Custom Staff Totals Extract	Creates an extract file that includes staff members for each selected organization. You can include additional fields from People and Contributions in the extract. To include additional fields, click **Customize**.
Custom Totals Extract	Creates an extract file that includes selected organizations, as well as selected organizational profile and contributions fields. To choose additional fields to include, click **Customize**.
Flex Statement Extract	Creates an extract file that includes all information that prints on the Flex Statement. You can send this file to ACS Fulfillment Services to outsource your contributions statement mailing.

Lists

Report	Description
Contributor Listing	Creates a list of each contributor's Envelope Number, Name, Address, Phone, Contributor Type (Individual or Combined), Statement Flag (Mail, E-mail, or None), and Active Flag.
Custom Staff Totals Report	Creates a list of staff and selected contributions or individual special fields. To select fields to display, click **Customize** and select the appropriate columns under **Formatting Options**.
Custom Totals Report	Creates a list of organizations and selected contributions or organization special fields. To select fields to display, click **Customize** and select the appropriate columns under **Formatting Options** .
Gift Detail Listing	Creates a list of each contributor's gifts for the selected date range, including the Post Date, Type, Fund, Gift Amount, Check Number, Value of Service, and Gift Descriptions.

Report	Description
Gifts by Fund	Creates a list of contributors and up to three report formats of gift information listed by fund for a selected date range. To select the report format, click Customize. On the **Report Options** tab, select the appropriate option under Contributions Options.
Gifts by G/L Account	Creates a list of gifts by contributor and the General Ledger accounts associated with each gift. This includes the Income Account, Checking Account, Posting Date, Fund Code, Fund Descriptions, Transaction Amount, and Total for the selected date range.
Giving Plans Listing	Creates a list of Giving Plans, including the Fund Code and Description, Envelope Number, Contributor Name, and the Total Pledge amount for each plan.
Monthly Posting Register	Creates a list that includes the weekly gift amount, MTD, and YTD total for each contributor who gave during the selected time period. A summary page that includes a YTD total for all contributions prints at the end of the report. You can print this report in Portrait or Landscape format.
Multi Year Giving Report	Creates a list of summary giving totals for each fund for the selected date. Entries are listed by contributor and include the YTD gifts for the selected year, the previous four years, and total giving amounts for each contributor.
Multi Year Pledge Report	Creates a list of summary totals for each fund for the selected date. Entries are listed by contributor and include the Fund, Total Pledge Amount, Year-to-Date Gifts for the selected year and the previous three years, and the contributor's pledge balance.
Pledge Detail Listing	Creates a detailed list of pledges for a selected date range, including the pledge amount, frequency, start and stop dates, total pledge amount, pledge-to-date amount, and total gifts to date, including prepayments.
Pledge/Gift Report	Creates a list of summary totals for each fund for the selected date range. The report includes each contributor's Fund, Total Pledge Amount, Pledge Gifts this Period, Prior Year Payments, and Pledge Balance.
Unfinished Postings	Creates a list of gifts that have not been posted. Use this report to verify that all transactions have been posted prior to year-end. Transactions from Remote Deposit Capture and/or Access ACS Import also display
Void Report	Creates a list of voided transactions for the selected date range. The list includes the Contributor, Post Date, Void Date, Void User, Fund Code, Description, and Reference number.

Statements

Report	Description
Charitable Contributions Report	Creates statements containing a list of gifts for each contributor for the selected date. This report prints on the Charitable Contribution Form that is available from ACS and fulfills all IRS tax statement reporting requirements.
E-mail Plain Paper Statement	Creates a detailed list of each contributor's gifts for an unlimited number of funds. Using Constant Contact, you can e-mail this report to your contributors.
Flex Statement	Creates statements containing a list of gift amounts for a selected date. This flexible report form, which can be purchased from ACS, can be designed to display data in a monthly, bi-monthly, quarterly, semi-annual, tri-annual, or yearly format.
Giving Statement	Creates statements containing a list of gift amounts for a selected date range. Pledge information calculates based on the selected year and pledge end date. All report and column headings print on the report, which does not require a pre-purchased form.
Plain Paper Statement	Creates a detailed list of each contributor's gifts for an unlimited amount of funds. All report and column headings print on the report, which does not require a pre-purchased form.
Quarterly Statement	Creates statements containing quarterly gift totals and pledge to date information. To select Fund or Pledge Groupings, click **Customize** and select the appropriate groupings under Contributions Options.

Statistics

Report	Description
Gift Range Totals	Creates a list of the total number of contributors that have given within a specified dollar range. It also includes Total, Total Given, Average this Period, and Average this Period Last Year percentages.
Pledge to Date Status	Creates a list of contributors with pledges and their overall pledge status for the selected date range. This includes the Pledge to Date amount, Total Pledge Gifts applied, Non-Pledge Gifts, Pledge to Date Balanced, Percentage Paid, and Pledge Status.
Pledge Gift Comparison	Creates a list that compares gifts, pledges, or both over two different years or the same year. It includes the difference between the two amounts, the percent change between the two amounts, and the pledge status. Gift totals do not include prepayments.

Report	Description
Pledge Gift Totals By Fund	Creates a list that compares pledge and giving totals by fund and lists the Fund Description, Total Pledge Amount, Pledge To Date Amount, Total Gifts, total count of pledges, and total count of gifts. Gift totals do not include prepayments.
Summary Gift Totals By Contributor	Creates a list of contributors with Week-to-Date, Month-to-Date, and Year-to-Date totals for all or selected funds.
Summary Gift Totals By Fund	Creates a list of funds and the Week-to-Date, Month-to-Date, and Year-to-Date totals. Only funds that have gifts or pledges for the selected year are included.
Summary Gift Totals By Month	Creates a list of months and the total gifts received for each month.
Summary Totals - MTD, YTD, YTD Prior	Creates a list of contributors and the Month-to-Date, Year-to-Date, and total Year Gifts for the selected date.

Quarterly Statements in Organizations

The Quarterly Statement is a highly customizable report designed for upper-level organizations to generate a quarterly statement detailing selected fund and pledge groupings for their sub-organizations. This report enables you to format the statement for your organization's specific needs.

Creating the Quarterly Statement requires a solid understanding of right-click and drag-and-drop functionality. If you have never formatted a report using drag-and-drop or right-click options, you should familiarize yourself with these functions before setting up the Quarterly Statement.

Here are the steps for setting up Quarterly Statements:

- Plan your desired statement layout carefully before you begin formatting. To learn more, see Mapping out Quarterly Statements in Organizations.
- Decide whether to use Pledge Groupings or Fund Groupings, then set them up. To learn more, see Setting up Pledge Groupings on the Quarterly Statement and Setting up Fund Groupings on the Quarterly Statement.
- Set up Headings and Subheadings on the Report. To learn more, see Setting up Headings and Subheadings on Quarterly Statements.
- Set up and print your Quarterly Statement. To learn more, see Setting up Quarterly Statements in Organizations.

Mapping out Quarterly Statements in Organizations

Because headings, subheadings, and funds print in the order that you add them during setup, it is a good idea to map how you want to organize the headings, subheadings, and funds before you begin setting up the report.

Funds print differently depending on whether they are set up under a heading, a subheading, or on their own.

Example 1

You set up a heading of **Memorials** with the John Brown Memorial Fund, the Gladys Green Memorial Fund, and the Martha Moore Memorial Fund under it. The organization you are printing the Quarterly Statement for did not contribute to any of these memorial funds.

On the report, you will see the heading **Memorials**. Under that heading, you will see **Memorials Total** with zero dollar amounts across the report.

Example 2

You set up a heading of **Memorials** with the John Brown Memorial Fund, the Gladys Green Memorial Fund, and the Martha Moore Memorial Fund under it. The organization you are printing the Quarterly Statement for contributed to the John Brown Memorial Fund and the Martha Moore Memorial Fund.

On the report, you will see the heading **Memorials**. Under that heading, you will see the John Brown Memorial Fund and the amount the organization contributed to that fund each quarter and a total amount listed across the report. Next, you will see the Martha Moore Memorial Fund with the amount the organization contributed to that fund each quarter and a total amount listed across the report. Finally, you will see the **Memorials Total** with the total amounts for each quarter and a total for the year listed across the report.

Example 3

You set up a heading of **Outreach** with a subheading of **Missions** and a subheading of **Missionaries**. You have several different mission funds listed under the Missions subhead and several missionary funds listed under the Missionaries subhead. The organization you are printing the Quarterly Statement for contributed money to several mission funds and several missionary funds.

When the report prints, you will see the heading **Outreach**. Under that heading, you will see the subheading **Missions** with the total amount the organization contributed to mission funds for each quarter and a total amount for the year listed across the report. Next, you will see the subheading **Missionaries** with the total amount the organization contributed to missionary funds for each quarter and a total amount for the year listed across the report.

Example 4

You have selected to print all of the funds that are available to print, but there are no headings or subheadings. The organization you are printing the quarterly statement for only contributed money to two funds.

When the report prints, only the information for those funds the organization contributed to will print.

Setting up Fund Groupings on the Quarterly Statement

You can set up Fund Groupings to print on the Quarterly Statement.

> **Before setting up the report**
>
> Because headings, subheadings, and funds print in the order that you add them to the setup, it is a good idea to map out how you want to organize the headings, subheadings, and funds first.

To set up Fund Groupings

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under **Organizations**, expand **Contributions**, then **Statements**.
4. Select the **Quarterly Statement** and click **Customize**.
5. Click on the **Report Options** tab.
6. Under **Contributions Options**, select **Use Fund Groupings**, then click **Select**.
7. Set up Headings and Subheadings.
8. Under **Funds**, click the fund you want to print information for, then drag the fund to the **Layout** field and drop it there. If you want the fund to be listed under a heading or subheading that you have already set up, drag the fund to the heading/subheading you want to put the fund under and drop it when the heading/subheading is highlighted.
9. Repeat the previous step for each fund you want to include.
10. Click **Return**.
11. To display the report, click **Preview**.

Setting up Pledge Groupings on the Quarterly Statement

When printing the Quarterly Statement, you must select to use either Fund Groupings or Pledge Groupings. If you select to use Pledge Groupings, you can select which funds you want pledge information to print for. The funds print on the report in the order that you add them during setup.

To set up Pledge Groupings

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under **Organizations**, expand **Contributions**, then **Statements**.
4. Select the **Quarterly Statement** and click **Customize**.
5. Under **Contributions Options**, select **Use Pledge Groupings** and click **Select**.
6. Set up Headings and Subheadings.
7. Under **Funds**, click the fund you want to print information for, then drag the fund to the **Layout** field and drop it there.
8. Repeat these steps for each fund you want to print.
9. Click **Return**.

Setting up Headings and Subheadings on Quarterly Statements

You can set up headings to group funds under on the Quarterly Statement.

After you set up headings, you can set up subheadings to group funds and display summary totals on your report. To create groups, select a fund, then click **Add Heading**. To create sub groups, click on an existing group, then click **Add Subheading**. Then, use the arrows to add and remove funds from the selected group, or click and drag the funds into the **Layout** pane.

> **Before setting up the report**
>
> Because headings, subheadings, and funds print in the order that you add them to the setup, it is a good idea to map out how you want to organize the headings, subheadings, and funds first.

To set up headings

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. In the upper sidebar, expand **Contributions**, then **Statements**.
4. Select the **Quarterly Statement** and click **Customize**.
5. Under **Contributions Options**, select **Use Fund Groupings** or **Use Pledge Groupings** and click **Select** .
6. In the Fund Grouping window, right-click in the **Layout** pane.
7. Click **Add Heading**.
8. Enter a name for the heading and click **OK**.

To set up subheadings

1. Set up your fund headings.
2. In the Fund Grouping window, right-click on a heading in the **Layout** pane.
3. Click **Add Subheading**.
4. Enter a name for the subheading and click **OK**.

Additional Field Information

Add Heading
When you set up fund groupings and/or pledge groupings, you can add a heading to group more than one pledge or fund together. After you click **Select**, right-click in the **Layout** section of the displayed window. If you create a heading, the detail information for the selected funds or pledges prints on the statement along with a total.

Add Subheading
When you set up fund groupings and/or pledge groupings, you can add a subheading to a heading you

created. To add a subheading, select the heading for which you want to create a subheading, right-click and select **Add Subheading**. If you create a subheading, only summary information for all funds or pledges under the subheading prints on the statement.

Delete

To delete the selected fund or pledge grouping, right-click in the **Layout** section of the displayed window. If you select a heading or subheading to delete, all funds or pledges under the heading or subheading are deleted.

Setting up Quarterly Statements in Organizations

Creating the Quarterly Statement requires a solid understanding of right-click and drag-and-drop functionality. If you have never formatted a report using drag-and-drop or right-click options, you should familiarize yourself with these functions before setting up a Quarterly Statement.

> **Dragging and Dropping**
>
> When you drag-and-drop a selection to a heading or subheading, you must drop the selection directly on top of the heading or subheading to list it appropriately.

To Set up Quarterly Statements

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under Organizations, expand **Contributions**, then **Statements**.
4. Select **Quarterly Statement** and click **Customize**.
5. On the **Report Options** tab, select the **Organization Level** you want to display the report for and the **Organization Report Options** you want to use.
6. Under **Contributions Options**, select **Use Fund Groupings** and/or **Use Pledge Groupings**.
7. **Optional:** Under **Contributions Options**, edit the information in the Message field.
8. Under Date Selection, in the **Analysis Date** field, enter the date you want the information to print for. For example, if you only want to see information through March 31, enter the date 03/31/Year.
9. **Optional:** To include staff positions in the statement, under **People Options**, select **Selected Staff Positions** and click **Select**.
10. **Optional:** Under **Formatting Options**, select the format options you want to use.
11. **Optional:** Select **Use Last Search Results** to see only information for the organizations included in your last search.
12. To view the statement, click **Preview**. To print the report, click **Print Report** .

Deleting Groupings on the Quarterly Statement

You can delete Fund or Pledge groupings from the Quarterly Statement setup.

> **Be Careful**
>
> If you select a heading or subheading to delete, all funds under the heading or subheading are deleted.

To delete a fund or grouping

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. In the upper sidebar, expand **Contributions**, then **Statements**.
4. Select the **Quarterly Statement** and click **Customize**.
5. Under **Contributions Options**, click **Select** beside the **Use Fund Groupings** or **Use Pledge Groupings** checkboxes.
6. To delete only one fund: Under **Layout**, right-click on the fund and click **Delete**.
7. To delete a subheading grouping: Under **Layout**, right-click on the subheading and click **Delete**.
8. To delete a heading grouping: Under **Layout**, right-click on the heading and click **Delete**.
9. Click **Return**.

Setting up the Custom Totals Report

The Custom Totals Report enables you to customize a report that contains Contributions or Special Fields information that you define.

Before previewing or printing the Custom Totals Report, you must select from the available columns. If you do not select columns, the report only displays a list of selected organizations.

To select columns for the Custom Totals Report

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under **Organizations**, expand **Contributions** and then **Lists**.
4. Select the **Custom Totals Report** and click **Customize**.
5. On the **Report Options** tab, select the options you want. See the Additional Field Information below to learn more about each option.
6. Under **Formatting Options**, select **Columns** and click **Select**.
7. In the **Column Type** drop-down list, select the first column that you want to print on the report. You can select from **Special Fields**, such as Geographic Zone or E-mail and from Contributions fields, such as Initial Payment or First Quarter Total.

> **Note**
>
> If you want to change the title of a column, enter a new title in the **Column Name** field. For example, you want the First Quarter Total field on the report, but you want the column title to be 1st Qtr. Total.
>
> You can also use the same column more than once, as long you change the **Column Name** of each one. For example, to display two Total for Date Range columns for two separate funds, select the **Total for Date Range** column, rename the column to Total - Men's Ministry (the name of your Fund) and then select a Fund. Repeat this process for the second Fund.

8. To add this column to the Defined Columns window, click **Add** . If you select any of the Contributions fields, you can also select the funds from which information displays. If you select funds for a Contributions field, you can update the selected funds from the Custom Column Setup window by selecting the **Contributions** field from the **Defined Columns** box and clicking **Update Funds**.
9. **Contribution Information Only:** Select from among the available funds in your data. Only information for the selected funds display on the report. Click **Return** when you are finished.
10. Click **Return**, to save your selections.
11. To view the report, click **Preview**.

Additional Field Information

Organization Report Options

- **Name Options** — Select to print the organization name or the reference name.
- **Include Deactivated** — Select to print organizations that are not active. Records are deactivated in the View/Edit Organization window.
- **Selected Organizations** — Select specific organizations to include on the report. By default, information for all organizations displays unless you choose this option and click **Select**.
- **Print PIN** — Select to print the PIN for all selected organizations.
- **Custom Sort** — Choose this option and click **Select** to sort in a different order. By default, organizations print in alphabetical order.

Date Selection

Enter a date range for this report. You can either enter a date in each field manually or select a date from the drop down list.

People Options

- **Include Individuals** — Select to include individuals with recorded contributions in the report.
- **Include Deactivated** — Select to include People and Contribution records that are not flagged active. This option is only available if **Include Individuals** is selected.

Formatting Options

- **Columns** — Select columns for the Custom Totals report.
- **Group By Parent** — Group organizations together with their parent organization. This groups your organizations according to the hierarchy you created.
- **Page Break** — Select to insert a page break after each parent organization's information.
- **Combine Child Totals w/Parent** — Select to combine child totals with parent totals.
- **Allow % over 100** — Select to allow percentages over 100.
- **Newsletter Only** — Include only records with the Newsletter option selected. For organizations, the Newsletter flag is set on the View/Edit Organization window. For staff members, you must select either Family or Individual for the Newsletter option in the View/Edit Individual window.

Search Results

Select **Use Last Search Results** to print any report based upon your last set of search results. You can only select the **Use Last Search Results** option if you have previously processed a search.

Organization Directory Reports

Directory reports are used to print directories and listings for mailing purposes or for staff records.

The following Directory reports are available:

Report	Description
Document Library	Creates a list in directory format of documents stored in the document library for selected organizations. To choose which organizations' documents display, click **Customize** and select **Selected Organizations** on the **Report Options** tab.
Organization Hierarchy	Creates a list of an organization's structure and includes each organization's name, addresses, phone numbers, and year established in directory format.
Organization Profile	Creates a list of statistics, contributions, and sub-organization information for the selected organizations in directory format.
Organization/Staff Directory	Creates a list of selected organizations and their address, phone number, staff members, and activities in a directory format.
Staff Mailing Directory	Creates a list of staff members' names and addresses for the selected organizations in directory format. To choose which organizations' staff members display, click **Customize** and select **Selected Organizations** on the **Report Options** tab.

Setting up the Organization Profile Report

The Organization Profile Report is part of the Directory reports. However, the available options differ from all other Directory reports.

To set up the Organization Profile Report

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under **Organizations**, expand **Directories**.
4. Select **Organization Profile** and click **Customize**.
5. On the **Report Options** tab, select the customization options you want, then click **Preview** to display the report.

Additional Field Information

Organization Report Options

- **Organization Level** — Select the organization level for which you want to display.
- **Include Deactivated** — Includes deactivated organizations in the report. The active flag is set on the Identification tab.
- **Selected Organizations** — Select specific organizations to include on the report. By default, information for all organizations displays unless you choose this option and click **Select**.
- **Print PIN** — Displays the PIN for all selected organizations.
- **Print Pictures** — Displays the organization's picture on the report. If selected, the picture displays above the Additional Fields area on the report. This option is unavailable if **Edit Organization** is set to **None** in Add/Edit Users.
- **Print Sub-Organizations** — Displays the sub-organizations of each organization on the report.
- **Print Phone/E-mail** — Includes the phone number and e-mail address for the selected organizations. To determine which phone number and e-mail address associated with the organization displays, click **Select**.
- **Custom Sort** — Choose this option and click **Select** to display the organizations in the report in a different order. By default, organizations display in alphabetical order on reports.
- **Print Activities** — Displays and prints activity information on the report. You can choose to print all activities, or you can select specific activities.

- **Print Comments** — Displays and prints comments on the report. You can choose to print all comment types, or you can select specific comment types.
- **Print Contributions** — Select to print information from the Contributions module. To determine which funds display, choose **Selected Funds** and click **Select**. By default, all funds display on the report unless you select specific funds. You can also determine the date range by selecting the appropriate dates in the **Date Range** drop-down list.
- **Print Statistics** — Includes Statistics information on the report. By default, all Statistics information prints on the report, unless you choose **Selected Fields** and click **Select** to determine which fields display. To display statistics for a specific year, select the appropriate year in the **Statistics** Year drop-down list.

People Options

- **Staff Date** — Select a date for which staff members display on the report. By default, the current date is selected, and the current staff members display.
- **Print Primary Contact** — Displays contact information for each selected organization.
- **Print Staff Section** — Displays all staff members on the report. By default, information for all staff members displays unless you select this option and then select staff positions through Selected Staff Positions. You can include a staff position and all position levels or include only selected position levels. You must select this option before **Print Staff Address**, **Print Staff Phone**, and **Print Unlisted Phone** options display.
- **Print Staff Address** — Displays staff members' addresses.
- **Print Staff Phone** — Displays staff members' phone numbers.
- **Print Unlisted Phone** — Displays phone numbers designated as unlisted.

Formatting Options

- **Page Break on Organization** — When selected, a page break displays between each organization listed on the report.
- **Newsletter Only** — Includes only records with the Newsletter option selected. For organizations, the **Newsletter** flag is set on the **Identification** tab in the Organizations module. For staff members, you must select either **Family** or **Individual** for the newsletter option on the **Profile** tab in the View/Edit Individual window of the People module.
- **Use Last Search Results** — Prints any report based upon your last set of search results. Perform searches from the People, Contributions, Connections, or Attendance module using any of the information available on which to search. You can only select **Use Last Search Results** if you previously processed a search.

Organization Extracts

The Extract report types are used to export information in a format that can be used with another software application.

For example, you can export a list of staff members and their addresses to HTML format and post this information on your Web site. It is important that you print the Extract Legend when exporting information. The Extract Legend details the fields included in the extract and how the field names display when you are working with that information.

All of the extracts are found in Organizations reports, but some are found under **Contributions**, and others are found under **Extracts**.

The following Extracts are available:

Report	Description
Custom Staff Totals Extract	Creates an extract file that includes staff members for each selected organization. Additional fields from People and Contributions can be included in the extract. To select these fields, click **Customize**.
Custom Totals Extract	Creates an extract file that includes selected organizations as well as selected organizational profile and contributions fields. To choose which additional fields to include, click **Customize**.
Flex Statement	Creates an extract file that includes all information that prints on the Flex Statement. You can send this file to ACS Fulfillment Services to outsource your contributions statement mailing.
Organization Export	Creates an export that allows you to send and use your ACS data in other software products. You can choose the export type, records to include, layout, and sorting method by clicking **Customize**.
Organization Names and Special Fields Extract	Creates an extract file that contains organization names and Special Fields. To choose which fields you want to extract, click **Customize**. On the **Report Options** tab, select **Special Fields** and click **Select** to chose the fields.
Staff Names and Special Fields Extract	Creates an extract file that contains staff names and selected Special Fields. To choose which fields to extract, click **Customize**. On the **Report Options** tab, select **Special Fields** and click **Select** to choose the fields.
Staff/Activities Extract	Creates an extract file that includes the staff's personal and activity information and associated organizations. This .mdb (Microsoft Access) file can be opened in Microsoft Access or Report Builder.

Report	Description
Statistics Extract	Creates an extract file of selected organizations' statistical information. To select which organizations, statistical fields, and years to display, click **Customize**.

Performing an Organization Extract

Use Organization Export for a quick way to export specific information to other programs and share with others.

To perform an Organization Extract

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Expand the **Extracts** report type, select **Organization Extract**, and click **Customize**.
4. On the **Format** tab, under **File Format**, select the format to save the export as.
5. Under **File Name**, click **Lookup** .
6. Select a destination and enter a file name for the export and click **Save**.
7. On the **Settings** tab, select the options you want for the export.
8. Under **Organization Options**, in the **Level** drop-down list, select the level of the organizations to gather information from.
9. Review your selections on the Settings tab before proceeding, then click the **Layout** tab.
10. Under **Available Fields**, select a field to export. Click to add the field to Export Fields or to add all the available fields. Click to remove a field or to remove all fields from Export Fields. To move a field up or down in the order to appear in the export, click or .
11. Continue selecting and adding fields you want, then click **Extract**.
12. When the completion message displays, click **OK**.

Additional Field Information

Record Selection

- **Organizations** — Select to gather information from all organizations.
- **Contributors Only** — Select to gather information only from organizations that are contributors.
- **Newsletter** — Select to gather information only from organizations that subscribe to your newsletter.
- **Sponsors** — Select to gather information only from organizations that are sponsors.
- **Staff** — Select to gather information only from organizations with staff.

Address Options

Select the address you want to display in the extract (Primary, Mailing, Meeting, or Statement).

Label Options

- **Print Uppercase** — Select to use the export to create a file for third party mailing software or printers. This allows you to customize the record selection to meet USPS standards. If this option is clear, the record selection prints in proper case.

- **Print Total Count Label** — Select to print the number of records in the report.

Sort Order

Select to sort your labels alphabetically, by ZIP Code, custom, for Basic Bulk Mail, or for a Max It! mailing.

Staff Options

These options are only available if you selected **Staff** under Record Selection.

- **Use System Date** — Select to gather the organization's current active staff information according to the current date.

- **Effective Date** — If you clear the Use System Date option, the Effective Date drop-down calendar becomes available. Select to gather the organization's active staff information according to an effective date.

- **Select Staff Positions** — Select to gather the organization's staff information for chosen staff positions. To select the staff positions, click Select.

- **Include Label if No Position Exists** — Becomes available when you choose Select Staff Positions. Select to include labels for staff positions not filled. This process prints staff position titles on labels instead of individual names. For example, a label might read: Minister of Music, 3626 Springfield Dr., Denver, CO, 80202.

Search Results

Select **Use Last Search Results** to use the information from the last search performed for the export.

Print Label Options

To print a list of the selections you made on the **Settings** tab, click **Print Label Options**.

Organization List Reports

List reports provide you with a listing of selected information.

The following List reports are available:

Report	Description
Activity Involvement Detail	Creates a list of activities and the organizations who are involved in them. To select which activities and organizations display, click **Customize**.
Listing of Address Changes	Creates a list of organizations and their old, new, and deleted addresses, as well as the date the address was changed in ACS.
Listing of Organizations by Sponsor	Creates a list of organizations that are sponsors and lists the organizations that they sponsor underneath. The primary contact for each organization as well as the contact's address and phone number are included.
Listing of Primary Contacts	Creates a list of organizations and their primary contact. It also includes the primary contact's address and phone number.
Listing of Sponsors by Organization	Creates a list of sponsored organizations with their sponsoring organizations listed underneath. The primary contact for each organization as well as the contact's address and phone number are included.
Master Listing of Activities	Creates a list of organizations and their current activities. If an organization is not involved in any activities, that organization is not included on this report.
Master Listing of Comments	Creates a list of comments for each organization. To select comment types to display, click **Customize**.
Newsletter List by Church	Creates a list of organizations and affiliated individuals who receive your newsletter. The list is sorted by organization and can also include activities information.
Organization Changes Log	Creates a list of organizations whose Profile, Addresses, Phones/E-mails, or Additional Fields tabs have been changed. To activate the Organization Changes Log, you must select **Activate Organization Changes Log** in the Organization Setup window.
Organization Names and Special Fields	Creates a list of organizations and selected Special Fields. To select Special Fields to include in the report, click **Customize**. On the **Report Options** tab, select **Special Fields** and click **Select** to choose which fields to display.

Report	Description
Staff Mailing Records	Creates a list of an organization's staff members, mailing address, and phone number. Staff members are listed alphabetically and are not grouped by organization.
Staff Names and Special Fields	Creates a list of staff members and selected Special Fields. To select Special Fields to include in the report, click **Customize**. On the **Report Options** tab, select **Special Fields** and click **Select** to choose which fields to display.

Organization Statistics Reports

There are three statistics reports to choose from: the Statistical Layout Report, the Statistics Report, and the Yearly Statistical Summary Report.

The Statistics Report requires setup of the rows and columns in a grid, but you do not need to set up the Statistical Layout Report. It prints the actual statistics layout for a selected year.

Report	Description
Statistical Layout Report	Creates a list of the fields that are set up on the Statistics tab in View/Edit Organization, organized by page.
Statistics Report	Creates a list of selected organizations' statistical information. To select which organizations statistical fields and years to display, click **Customize**.
Yearly Statistical Summary	Creates a graph of up to 10 years and 12 fields of statistics for each organization. To set up the report, click **Customize**.

Selecting the Organization Statistics Report's Layout

The Statistics Report and its extract displays information in a tabular format. You define the rows and columns that display on the report, as well as the subject of the report (the **Grid** option).

You can customize this report in any number of ways. We recommend that you experiment with the different features and layout options in order to determine the options that work best for your organization.

Here are some facts concerning the Statistics Report:

- When defining the Statistics Report, you must define the information that displays in the **Rows**, **Columns**, and **Grid**. You can select from **Organizations**, **Fields**, and **Years**.
- You cannot select more than one option for a row, column, or the grid. For example, you cannot select to have **Organizations** and **Fields** in the **Row**.
- Similarly, you cannot select the same option for more than one layout. For example, you cannot select to have the **Year** display in both the **Column** and the **Grid**.
- Once a row and column are defined, the grid automatically adjusts to the remaining option. You can select the desired subject of the report from the **Grid** drop down list. For example, if you select **Organizations** as the **Row** and **Year** as the **Column**, then the **Grid** drop-down list displays available **Fields**.

To select the layout of the Statistics Report

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Staff/Organizations Reports** and click **Go** .
3. Under **Organizations**, expand **Statistics**.
4. Select **Statistics Report** and click **Customize**.
5. Click on the **Report Options** tab.
6. To select the rows or columns you want to display on the report, under **Layout**, click the **X** beside **Organization**, **Field**, or **Year**.
7. To select or remove desired organizations, fields, or years, click **Add** or **Remove** , then click **Return**.
8. Select a grid from the **Grid** drop-down list. The choices available depend upon the layout option that remains. For example, if you have defined **Organization** as the **Rows** and **Fields** as the **Columns**, then only **Years** remains available from the **Grid** drop-down list.
9. To view the Statistics Report's layout, click **Preview**.

Examples

Situation 1:

You want to print a listing of total baptisms for each year between 2000 and 2009 for a specific organization. Select:

Rows: Year

Columns: Field

Grid: Organization

Situation 2:

You want to print Total Membership and Bible Study Membership for a specific organization for each year between 2000 and 2009. Select:

Rows: Field

Columns: Year

Grid: Organization

Situation 3:

You want to print enrollment totals for each Sunday School Class for each organization for the year 2009. Select:

Rows: Organization

Columns: Field

Grid: Year

Situation 4:

You want to print Total Membership and Bible Study Membership for all organizations for the year 2009. Select:

Rows: Organization

Columns: Field

Grid: Year