

Access ACS Plain Paper Statement Extract

The Access ACS Plain Paper Statement Extract lets you upload contribution records to Access ACS.


The extract creates a detailed file of gifts for each contributor that is included when you upload to Access ACS. This statement file contains prepayments made in previous years and is always based on a calendar year. It features a return address field, and the option to upload pledge information and fund summary. Statements display on the individual's Access ACS record until you extract or upload them again.

You can select an unlimited number of funds. The fund summary lists the total gifts, total pledge, prepayments made in previous years, and the pledge balance by fund, but does not include funds with zero amounts.

After [uploading this extract](#), contributors can print the **Plain Paper Statement** report in Access ACS.

Tip 

The Access ACS Plain Paper Statement Extract meets the **IRS requirements** for reporting charitable gifts. It provides a detailed list of contributions, and acknowledges the IRS requirements for reporting non-cash gifts, items-of-value gifts, and contributions totaling \$250.00 or more in one day.

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Contributions Reports** and click **Go** .
3. Under **Contributions**, expand the **Extracts** report type.
4. Select **Access ACS Plain Paper Statement Extract** and click **Customize**.
5. Under **Title**, enter the title that you want to display on your statements, for example, Year-End Giving Statement.
6. On the **General** tab, select the date range.
7. On the **Report Options** tab, in the **E-mail Type** drop-down list, select the e-mail type to extract statements for. If you select **Preferred E-mail?**, you may still want to select an E-mail Type. If the record does not have a preferred e-mail address, ACS uses this e-mail type.
8. To generate statements for contributors regardless of what their [send statement by option](#) is set to, select **Ignore Send Statement Flag**.
9. Click **Extract**.
10. A message displays confirming the export is complete and asks if you want to print a report that lists records without e-mail addresses. To print a list of invalid e-mail addresses, click **Yes**.