What Should I Track in ACS?

Before entering records into ACS, you need to set up the important information you want to track. To get you going faster, we're going to start with just some basic information. You can come back later and add additional items you want to track.

Answer these questions before setting up ACS. Some questions may be a simple yes or no, while others may require multiple answers, and you should include other staff if necessary when answering the questions.

What terms do you use to identify the relationship between individuals in the database and our organization?

To help you decide, think about what you call:

- Your members
- Those who attend special events or Bible studies, but are not members.
- Casual Visitors

In People, the names of these relationships are called **Member Statuses**. A person's Member Status defines the relationship they have with the organization. Default member statuses are set up in Define Lists, but you can delete any you will not use.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People** and click **Go** .
3. In the Define Lists window, under **Fields**, expand **Individual**, then **Lists**.
4. Select **Member Status**. A list of member statuses displays.
   - To add additional member statuses, click **Add**.
   - To edit a member status description, select the status you want to edit, then click **Edit**.
   - To delete a member status, select the status you want to delete, then click **Delete**.

How would you group each Member Status into the 3 larger groupings of Member, Prospect, Other?

In People, you have three large groups: **Member**, **Prospect**, and **Other**. These are called **Record Types**.

Once you choose the Member Statuses you want to use, decide which larger grouping to include each in. For example, First Time Visitor and Repeat Visitor could fall under a larger group called Prospect. Member, Member Non-Res, and Member Watchcare could fall under a larger group called Member.

Larger groupings are helpful in a variety of situations. For example, you are doing a search for everyone who is a Member Status (let's say you have four types of members). Rather than having to list all four in the search, you can just select the Record Type Member.

You can map Record Types to Member Statuses. This allows you to select a Member Status and then ACS automatically fills in the Record Type. You can map Record Types to Member Statuses in People Setup and in Define Lists.

1. In the People Setup window, click **Map Record Types to Member Statuses**.
2. In the right pane, select a **Member Status** and then click **Edit**.
3. In the **Associated Record Type** drop-down list to select the **Record Type** you want to map to this **Member Status**.
4. Click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People** and click **Go** .
3. Expand Individual, expand **Lists**, and select **Member Status**.
4. In the right pane, select a **Member Status** and click **Edit**.
5. In the **Associated Record Type** drop-down list select the **Record Type** you want to map to this **Member Status**.
6. Click **OK**, then **Close**.

How can people join your organization?

In ACS, this information is tracked in **Joined How?** Some examples are **Statement**, **Letter**, **Profession**. Define Lists contains default values for **Joined How?**, but you can edit or delete any you will not use.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People** and click **Go** .
3. In the Define Lists window, under **Fields**, expand **Individual**, then **Lists**.
4. Select **Joined How**. A list of possible joining reasons displays.
    - To add additional reasons, click **Add**.
    - To edit reasons for joining, select the reason you want to edit, then click **Edit**.
    - To delete a reason you do not use, select the reason you want to delete, then click **Delete**.

What terms do you use to refer to your head-of-house and spousal positions?

In ACS, these terms are **Head** and **Spouse**, but you can edit them and use your terminology (For example: Spouse 1, Spouse 2).

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select, **People** and click **Go** .

3. Under **Family Position Settings**, in the **Head of House Description** and **Spouse Description** fields, enter the descriptions you want to use.
4. When finished, click **OK**.

Do couples give as a combined unit, individually, or do some couples give together and other couples give independently of each other?

Couples may give as a combined unit or each give individually. Children can give separately from their parents. If you do not have the Contributions module, the Contribution area is grayed out on the Profile tab.

Make sure you have a list of contributors and their envelope numbers (if you use them), and know what contributors give individually or have a combined giving record to refer to when you start entering records.

Do you want to set up defaults when entering new individual records?

The defaults you can set up are for **Country**, **Member Status**, **Newsletter Flag**, **Newsletter Deliver By**, and **Email Type**. Setting up these defaults means ACS automatically includes the defaults in a new record. This saves you time because you don't have to enter any of that information.

Of course, if any default information is incorrect for an individual, you can edit the option.

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select, **People** and click **Go** .
3. Under **People Default Settings**, select the default **Country**, **Member Status**, **Newsletter Flag**, newsletter delivery method, and **E-mail Type**.
4. When finished, click **OK**.

What special, important information should you track for each individual or family?

ACS People has 12 user defined lists, 4 user defined fields, and 6 user defined dates for each person. You can use these to track information that your organization wants to track. Examples include **Date of Marriage** or **Faith Background**.

ACS People allows you to track up to 3 user defined lists and 3 users defined fields available on the family record. If you add information in one of these fields, it automatically displays on any other records in that family. Examples include **Family Deacon** or **Caregiver**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .

3. Under **Fields**, expand **Organization**, **Individual**, or **Family**, depending on who you want to track information for.
4. Expand **Dates**, **Fields**, or **Lists**, depending on the type of user-defined information you want to track.
5. Select a **Not Defined** date, field, or list, then click **Activate Field**.
6. In the **Field Description** field, enter the name you want to display for the field and click **OK**.

   Note

   Using punctuation marks (for example commas, apostrophes, colons, or dashes) in the names of additional fields can cause you to receive error messages when filtering, searching, and printing reports.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Under **Fields**, expand **Organization**, **Individual**, or **Family**, depending on who you want to track information for.
4. Expand **Dates**, **Fields**, or **Lists**, depending on the type of user-defined information you want to track.
5. Select a **Not Defined** date, field, or list, then click **Activate Field**.
6. In the **Field Description** field, enter the name you want to display for the field and click **OK**.

   Note

   Using punctuation marks (for example commas, apostrophes, colons, or dashes) in the names of additional fields can cause you to receive error messages when filtering, searching, and printing reports.
7. To add selection items for your list, click **Add**.
8. In the **Field Description** field, enter a selection option, then click **OK**. Or, to additional selection options, select **Add Another**, then click **OK**.
9. Repeat step 8 to add each selection option for your list. When finished, click **Cancel** to exit Define Lists.

Do you need to track individuals who are no longer active in the organization? Do you need to know why and when they became inactive?

Some organizations want to keep names, addresses, and other information about those previously associated with them but no longer active.

If you want to keep an individual's record but not have him or her display in reports, you can deactivate the individual. Examples: the individual moved out of town, moved his/her membership, or hasn't attended services for a specified amount of time. If this information is important, you may want to use a List and Date field to track why the record was deactivated and the date the record was deactivated.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to deactivate and click **View/Edit**.
4. Under **Name Information**, select **Inactive**, then click **OK**.

Do you want to track inter-family relationships in your membership?

You can track this information using **Other Relationships**.

For example, both Tom White and his grandparents, Scott and Ellen Browning, attend your church. Because their last names are different there is no way to know of their relationship unless someone has shared this with you.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to add contact information for and click **View /Edit**.
4. On the **Family** tab, under **Other Relationships**, click **Add**.
5. In the **Related Individual** field, click **Lookup** .
6. Locate and select the individual you want to add as an other relation, and click **OK**.
7. In the **Relationship** drop-down list, select a relationship.
8. **Optional:** To add a reciprocal relationship, select **Add Reciprocal Relationship**, then select the appropriate value from the **Relationship** drop-down list.
9. Click **OK**.