Uploading Statements to Access ACS

Use the Access ACS Plain Paper Statement Extract to upload contribution records to Access ACS through email. After you upload the extract, you can print the Plain Paper Statement report in Access ACS.

To view statements in Access ACS, a contributor’s statement flag (on the Profile tab in View/Edit Individual in ACS People Suite) must be set to E-mail or Both.

1. Under Searches and Reports, click the Reports tab.
2. Select Contributions Reports in the drop-down list, and click Go.
3. Expand Extracts, then select Access ACS Plain Paper Statement Extract.
4. In the lower sidebar, select the date range you want to extract gifts for, then click Customize.
5. 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.
6. To generate statements for contributors regardless of what their send statement by option is set to, select Ignore Send Statement Flag.
7. Select any additional options, then click Extract.
8. When the confirmation message displays, click Yes to print a list of invalid e-mail addresses or No to continue without printing.

1. Under Advanced Tools, click Admin Utilities.
2. In the drop-down list, select Sync with Access ACS.
3. Select the data you want to upload. Make sure to select Include Contributions.
4. Click Upload.

1. To log in to the Access ACS database, enter your site number, Access ACS user name and password, then click Login. To see the statement, this Access ACS user name must be attached to an uploaded record, or you can check someone else’s record under My Giving History.
2. Under Giving, click My Giving History.
3. Click Statement PDF, then click Print.