ACS Technologies

Frequently Asked Questions

Organizations

When entering staff or statistics for the current year, why can I only select previous years and the current year is not an option?

You can only select a Year value that corresponds to the year or range of years you select on the Configure Year window. You can add the current year as an available value by modifying your Year configuration using the **Staff/Statistics Maintenance** option.

To configure year settings:

1. On the **Organizations** menu, click **Staff/Stats Maintenance**.
2. Click **Configure Year**.
3. Enter a **Beginning Year** and an **Ending Year**.
4. Click **OK**.

We have field staff that only deal with specific organizations, or sub-organizations. How can I set up the Find Organization menu so field staff can only view the records that pertain to them?

You can set up filters based upon the parent organization to create a subset of your data when using the **Find Organization** menu.

To create a filter based on a parent organization:

1. On the **Organizations** menu, click **Add/Edit Organizations**.
2. On the **Find Organization** menu, click **Filter**. The **Edit Filters** window displays.
3. Enter a description for the filter in the **Filter Description** field.
4. From the **Available Fields** list, select the **Parent** field, and then click **Add**. The **Filter on Parent Organization** window displays.
5. Select **Equal To** under **Filter Type**, click the **Lookup** button ... and select the parent organization you want to filter on, and then click **OK**.
6. Click **OK**, then click **Apply**. The **Find Organization** menu displays with the filter applied.

Why do I need the People module if I am only tracking Organization information?

The People module consists of the central point for almost all data in the People Suite. Due to this design it is a system requirement that you have the People module installed, even if you are only tracking Organizations information. Without the People module, several of the features in Organizations would not be available. For example, you cannot assign staff to your list of organizations unless you have the People module installed.

What is the Statistic Views option used for?

The **Statistics View** option, available from the **Find Organization** menu, provides you with an alternative way to view statistical information for an organization. When viewing statistical information on the **View/Edit Organizations** window, you use the tabs to navigate between each information category, such as the **Identification**, **Activity**, or **Staff** tabs. The **Statistics View** option displays statistical information for an organization by view rather than by tab, and can be configured using the **Define Statistics Views** option.

Why are church names printing twice on Contribution Statement reports since loading the ACS 6.0 Update?

The **Company Line** field was added to Contribution Statement reports as of the ACS 6.0 Update. Prior to the ACS 6.0 Update, the **Company Line** field was designed to automatically print in the **Company Address** line.

Why can’t I clear the primary organization off of a staff member record?

The **Primary Organization** option is designed to remain selected for a staff member record for each year that the record will be included in Organizations. If you selected the **Primary Organization** option when adding a staff member record that has been present for more than one year, you must remove the option for each year to completely clear the option for the record. A deleted staff position will also continue to be available for a staff member record until you delete the position for all years that it was associated with the record.

Since I need to enter organizational contributions as well as individual contributions, should I add organizations to the People module as well?

No, it is not necessary to add organizations as People records to post contributions from an organization. You can enter contributions for organizations as well as individuals using the **Find Org** option on the **Add/Edit Transactions** window. While there are Contributions report types available in the Organizations module, you can also include organizational information in reports from the Contributions module using the **Find Org** option.

Is it necessary to process two searches to get labels, one for my staff members with an organization and one for staff members without an organization?

No, it is not necessary to process two searches to differentiate between staff members with a designated organization and without an organization. You can include this information on your labels by performing a search using **Staff Members** criteria, then adding the **Primary Org Name** field on the **Settings** tab of the label you want to use. Labels in ACS are designed to print the name of the primary organization associated with an individual, or exclude the **Primary Org Name** field if no organization has been assigned and format the other label fields accordingly.

I have several organizations that do not need a parent organization, nor do they have any sub-organizations. How can I avoid creating generic levels in the organizational hierarchy?

You can avoid creating generic levels for an organization that does not need a parent organization and does not have sub-organizations by assigning it to the highest organizational level available.

Why am I getting the wrong staff names whenever I process a search or a report that involves staff members?

In this case, you will need to verify the date fields that you used when processing the search or report. Staff information is maintained by year, so it is very important to ensure that you select a year value that corresponds to the report or search you want to process.

I processed a search on a staff position and received valid results, but when I use the search results to process a report, I receive a "No records for selection" message. How can I include my search results in the report?

The results that you chose to include in the report consists of individual records, which are valid for the search, but not with the **Use Last Search Results** option for Organizations reports. The **Use Last Search Results** option for Organizations reports (with the exception of the **Custom Staff Totals** and **Staff Names and Special Fields** reports) is designed to only incorporate organizational-level data, not individual staff record data. When processing Organizations reports, it is not necessary to process and use search results based upon specific staff positions. In this case, you can choose the staff positions you want to include in your report using the **Selected Staff Positions** option on the **Setup** tab of the report.

How do I know which staff positions will be included when I create an advance export file of my organizations and staff members?

When creating a File Export of Organizations data in Advanced Export, as you add a primary or organizations field to the list of Selected Fields, the Options tab under Selected Fields will become available. You can use this tab to select the staff positions you want to include in your export.

To select the staff positions you want to include in your export:

1. On the **Advanced Export Menu**, click **Create New Export**.
2. Select **File Export** and then click **OK**.
3. On the **Groups** tab, select **Organizations**, select any additional options under **Record Selection** or **Search Results**, and then click **Next**.
4. Select the **Fields** tab, choose the Organizations fields that you want to include in your export, then select the **Options** tab.
5. Click **Organizations**.
6. Select **Staff Positions**, click **Select**, then move the positions that you want to include in the export from the **Staff Positions** list to the **Selected Staff Positions** list.
7. Click **OK**.

I have staff that would like to have their mail sent to their organization while others would like it sent to their house. How do I set this up without constantly changing the address for records or creating duplicate individual records with different addresses?

You can specify how you want each staff member to receive mail by selecting a **Mail To** option on the **Add/Edit Staff** window.

To change a staff member's mailing information:

1. On the **Organizations** menu, click **Add/Edit Organizations**.
2. Select an organization and click **View/Edit**.
3. Select the **Staff** tab and choose a Year for the staff information.
4. Select the staff member whose address information you want to change and then click **Edit**. The **Add/Edit Staff** window displays.
5. Select one of the following **Mail To** options, then click **OK**:
    - **Primary Organization** - Select to send the staff member's mail to their primary organization.
    - **Individual Address** - Select to send the staff member's mail to their home address.
6. Repeat steps 4 and 5 for each staff member whose information you want to change.
7. Click **Close**.