# A User's Guide

## What is Access ACS, and who can use it?

Access is a feature of our ACS computer system that has maintained the I.P.C.'s database of membership records, mailing lists and financial data for a number of years. Access allows all members and regular attendees of I.P.C. to view and manage their own data, including setting up and managing online giving. In addition, there are capabilities for coordinating ministry groups and activities which will be released in the coming months.

The only requirement for using Access is that you must already be in the I.P.C.'s database, with a current email address on file and be a member or regularly attending with plans to join. If you're not certain whether you're in the database with a current email address, or if Access doesn't recognize you, just send an email from the address you wish to have on file to directory@ipcsav.org and we will ensure that you're properly entered!

Access will let you do the following things:

- View or update your member profile.
- Add family and individual pictures to your member profile.
- If you're a ministry group leader, print, view, or email members of your group.
- View and respond to outreach opportunities.
- Register online for events. *(coming soon)*
- Give toward your pledge or contribute electronically as well as view your giving.
- Search, review, and submit interest in serving opportunities in the church. *(coming soon)*

More features will be added in time, depending upon demand!

## Logging in to Access

We invite you to become an Access user by going to the Member Login page by visiting our website (www.ipcsav.org), clicking the *myIPC* link in the top right and then clicking on the "Need a login? Click Here!" button. Enter your email address and name as they appear in I.P.C. records.

In the Account Sign Up screen, enter your first name, last name, and email address. The suffix field is optional. When you have entered the information, click the Find Me button. Note: Your First Name, Last Name and email address MUST match with our database or you will not be given an account. If you do not have an email address on file, then please email this information to directory@ipcsav.org.

If Access doesn't recognize your email address and name, email directory@ipcsav.org with the information as you would like to use for this purpose, and we will adjust your records appropriately.

When you have successfully completed the Account Sign Up, you will receive an email containing your username and temporary password for logging in to Access. When you have received it, return to the Member Login page and log in. You will be required to change your password on your first successful login to a password of your choice.

To protect your data, Access requires that passwords follow these rules:

- It may not contain parts of your username or e-mail.
- It may not include any of the following characters: < & > / \ ; % '
- It must contain two or more numbers.
- It must contain both lower and upper case characters.
- It must be over 8 characters long.

The system will also recognize you by a "User Name," which will be your first and last name from the I.P.C. records, concatenated without a space (plus, of course, your password). Record your password in a safe place! If you forget your password, the Member Login screen will send you a temporary login so you can set a new one. However, it must be substantially different from your last two previous passwords!

### Managing your personal data

Once you have logged in, you may view your personal data and edit it as you wish. You can even upload a photo, if you wish! Photos must be in .jpg format. You may also review your recent giving record. Unfortunately, giving records prior to 2014 are not available on Access. If you edit any of your data, your edits will be registered in the database the next time the database is updated, which may be as long as a day or so.

Should you need assistance, click on the "More info" link in the upper right corner of the page, and Access documentation will open in a separate window. If you need further assistance, click on the "Report a Problem" link and you will be able to write a message to one of us who maintain this system. We will try to help you as soon as possible!

Following is a brief discussion of how you may use the features and tabs presented to you.

| Home | | |
|---|---|---|
| | **My Overview** | |
| | | *Your dashboard, with access to main features of your records* |
| | **My Profile** | |
| | | *Personal contact information, photos, social networking links* |
| | **My Account** | |
| | | *Option to change your email, password, and social networking info.* |
| **Groups** | | |
| | **My Groups** | |
| | | *Option to select ministry groups* |
| **Events** | | |
| | | *Access Calendar* |
| | Calendar View | |
| | Table View | |
| **Giving** | | |
| | **Give Now** | |
| | | *Set up a one-time or recurring contribution* |
| | **Managed Scheduled Giving** | |
| | | *Displays the date and amount of your next scheduled contribution. From this tab, you can reassign payment methods, and edit or deactivate contributions.* |
| | **My Giving History** | |
| | | *See your Year To Date (YTD) giving history and pledge history* |

Note that any requested changes to your personal data will not take effect until they have been accepted into the main database. This may take a day or two. Off-line giving (e.g., checks and cash gifts) will be posted approximately once a week.

## Online giving

The Giving tab lets you set up, monitor and manage your giving to the I.P.C.. If you have submitted a 2014 pledge, your progress toward that pledge will be shown, as well as any other gifts to special funds such as flowers or music.



This screen lets you specify either a one-time gift, or set up a recurring donation. The continuation screens let you specify the payment method (credit card or bank account direct transfer), as well as selecting the fund to which your donation should go. If you wish, you may distribute a single gift among multiple funds.

The online giving process is made up of five steps:

> **Step 1** - Enter the gift amount and how often you want to give. You may select a recurrence pattern, from the options described in the table below.
> **Step 2** - Select the funds you want to give to, from the list provided. You may divide a single or recurring give amount among multiple funds.
> **Step 3** - Select a payment method. Supported methods include credit card or direct transfers from your bank account. Note: credit card payments incur an extra charge, which will be deducted from your specified gift amount, so that the I.P.C. actually receives less than the full amount of the gift.
> **Step 4** - Review and process your gift. Once a single gift is processed, it may not be cancelled. However, a recurring gift may be adjusted at any time.
> **Step 5** - View and print your receipt You must perform each step to complete the online giving process.

## Recurring gifts

You may specify a gift to be given on a recurring schedule. Optional recurrence patterns include:

| | |
|---|---|
| Weekly | Select this option to give the gift every week on the same day. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments. |
| Every 2 Weeks | Select this option to give the gift every two weeks on the same day. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments. |
| Monthly | Select this option to give the gift every month on the same day. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments. |
| Every 3 Months | Select this option to give the gift every three months on the same day. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments. |
| Twice a Month | Select this option to give the gift twice a month on two dates you specify. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments. The default 1st Payment and 2nd Payment dates are the 1st and the 16th. The gift is transacted on the first available date; if you enter the 5th and the 25th for the dates but it is the 10th, then the gift will not be transacted until the 25th. |

If you set up recurring giving to occur on the 28th, 29th, 30th, or 31st of the month, the following rules apply:

| Date | When Transaction Occurs |
|---|---|
| 28th | On the 28th day of the month |
| 29th | On the 29th day of the month, unless February or a leap year |
| 30th | On the 30th of the month unless it is February |
| 31st | On the 31st of the month, or the last day of the month if it does not have 31 days. |

If you set up recurring giving to stop on a day that falls within the scheduled frequency, the donation is still transacted. For example, if a recurring gift is set to end on the 30th of the month, the gift is made on the 30th even though it is the final day of the scheduled frequency.

## Designating funds

When entering funds, keep these things in mind:

- You can apply the entirety of the gift to one fund or divide the gift up among several funds.
- Your total gift amount displays below the funds as $ of $ Remaining. As you enter amounts for funds, the total amount available decreases. For example, I start off with $20.00 of $20.00 remaining. I enter $5.00 in the Van Fund. My new available gift now reads $15.00 of $20.00 Remaining.
- You can enter an Optional Description for each fund you give to. For example, if I give $100.00 to the Buildings and Grounds Fund, I can enter the Optional Description, "For the repair of the bird bath."
- You cannot proceed to the next step in the online giving process if the total of your funds is less than or more than your total gift amount you entered earlier. If you need to increase your gift amount, click Back and make the necessary changes.

Once you are satisfied with your funds, click Continue to select your payment method.

The following funds are available:

| Fund | Description |
|---|---|
| Pledge | Contributions toward your Pledge |
| General Offerings | Contribution toward General Fund (used if you did not pledge) |
| Missions | For the work of missions |
| Enlarging Our Tent | Capital Campaign/Renovation & Improvement of Property |
| March for Life | March for Life |
| Mercy Ministry | Mercy Ministry |
| Memorials | Memorials/Honorariums |
| Ministers Benevolence | For gifting to ministers |
| Initial Offering | Used at the beginning of the year to cover envelope costs |

Once you have set up a gift, you may print out a receipt using the Print button on the screen. You will also receive an email acknowledgement of your gift.

Future instances of a recurring gift may be changed or deleted at any time, using the Managed Schedule Giving tab under the main Giving tab. Click on the pencil icon under "Actions" to modify the gift.

## Site security
*Please be assured that the confidentiality of your data is our utmost priority. Your data is only available online to you, unless you choose to subscribe to ministry groups managed in this web site. These groups will have Access to your contact information only, not your giving record! With each item in your personal profile (phone numbers, email address, etc.), you may change it with the "edit" pencil and specify whether that information is to be listed or unlisted. You may mark all your information as "unlisted" by notifying us that this is your preference at directory@ipcsav.org. Our software provider is ACS Technologies, the largest developer of church management software in the industry. The I.P.C.'s data is housed in a secured data center maintained by ACS Technologies, and is subject to periodic security audits to ensure safety and privacy of your data.*