Managing Scheduled Gifts

Sometimes, people may be uncomfortable giving online or find it hard to do.

Contributors may call your church office or stop by in person to change their giving information or add a new gift. For convenience, we have a paper form that contributors can complete to authorize the church administrator to do it for them.

When you add, edit, delete, or place a gift on hold, you must complete, file, and store authorization forms. You can also automatically print this documentation when managing scheduled gifts in Access ACS.

ACS Pay Plus automatically sends a confirmation email anytime a contribution is made. All of these options help your church maintain a paper trail and comply with online giving documentation requirements.

To learn the best practices and what your responsibilities may be, see Enter Gifts on Behalf of a Contributor.

Add, Edit, or Delete Gifts

1. In ACS Pay Plus, click **Giving** > **Manage Scheduled Giving**.
2. Enter the contributor's name, then click **Search**. A list of contributor names and records displays.
3. Locate the contributor whose gifts you want to add, then click **Manage Gifts**.
4. On the **Current** tab, click **Add New Gift**.
5. Under **Admin Details**, select **I understand and agree to the documentation requirements for managing scheduled giving and payment methods**.
6. Enter a **Reason** for adding the gift. For example, phone call, walked in, contributor request.
7. Under **New Gift Details**, enter the gift amount, select a fund, and enter an optional memo.
8. Select the gift's **Frequency** and start and end dates.
9. Under **Payment Details**, enter the contributor's **Nickname**, **Account Type**, **Account Number**, and **Expiration Date**. If necessary, update the billing information.
10. Select **I would like to automatically print documentation for this gift**. This generates a form that complies with documentation requirements, which you can print for your records. If the contributor already completed the Client Initiated Gift Form or the form in the Electronic Giving Brochure, you can skip this step.
11. Click **Schedule Gift**.

After scheduling a gift, you may need to update it. For example, a contributor may call the church office and want to increase or decrease the weekly gift, or change the gift's frequency from weekly to monthly.

1. In ACS Pay Plus, click **Giving** > **Manage Scheduled Giving**.
2. Enter the contributor's name, then click **Search**. To filter results, select **Only contributors with scheduled giving**.
3. When the list displays, locate the contributor whose gifts you want to edit, then click **Manage Gifts**.
4. On the **Current** tab, locate the gift you want to edit, then click ✏️.
5. Under **Admin Details**, select **I understand and agree to the documentation requirements for managing scheduled giving and payment methods**.
6. Enter a **Reason** for adding the gift. For example, phone call, walked in, contributor request.
7. Under **Edit Gift Details**, update the gift information with the contributor's changes.
8. If the contributor wants to change payment methods, under **Payment Details**, select the account, or click **Add a New Payment Method**.
9. Select **I would like to automatically print documentation for this gift**. This generates a form that complies with documentation requirements, which you can print for your records.
10. Click **Schedule Gift**.

You can delete a gift if you need to. When you search for the contributor in Manage Scheduled Gifts, deleted gifts display on the **Deleted** tab.

1. In ACS Pay Plus, click **Giving** > **Manage Scheduled Giving**.
2. Enter the contributor's name, then click **Search**. To filter results, select **Only contributors with scheduled giving**.
3. When the list displays, locate the contributor whose gifts you want to delete, then click **Manage Gifts**.
4. On the **Current** tab, locate the gift you want to delete, then click ❌.
5. When the confirmation message displays, enter a **Reason** for deleting the gift, then click **Confirm Delete**.

Giving Schedules - On Hold

The **Giving Schedules - On Hold** section only displays if you have a deactivated gift. Deactivated gifts can be activated or deleted from the Giving Schedules - On Hold section.

Sometimes, contributors cannot donate on the scheduled basis, due to financial constraints. If this occurs, you can place a gift on hold.

1. In ACS Pay Plus, click **Giving** > **Manage Scheduled Giving**.
2. Enter the contributor's name, then click **Search**. To filter results, select **Only contributors with scheduled giving**.
3. When the list displays, locate the contributor whose gifts you want to place on hold, then click **Manage Gifts**.
4. On the **Current** tab, locate the gift you want to place on hold, then click ✏️.
5. When the confirmation message displays, enter a **Reason** for deleting the gift, then click **Place on Hold**.

1. In the **Giving Schedules - On Hold** section, under **Actions**, click **Activate** .
2. The gift is reinstated to the **Giving Schedules - Active** section.

Related Topics

Enter a One-Time Online Gift
Manage Payment Methods
Giving History
Pledge History