

Importing Transactions from Access ACS

In Contributions, you can select batches of Access ACS transactions and import these transactions into ACS People Suite. After importing, you can easily post these transactions just as you post checks and cash contributions.

If you use Access ACS, you must [print the Online Giving Report](#) and [import gifts from Access ACS](#) before closing the year.

To import transactions from Access ACS

1. Under Manage Records, click the **Contributions** tab.
2. Select **Enter/Post Contributions** from the drop-down list and click **Go**.
3. Click **Import Transactions**, then **Access ACS Import**.
4. When the Access ACS Import window displays, you have two importing options: You can select the transactions you want to import in the **Date/Type** drop-down list. Or, you can select transactions by their Vanco Payment Solutions batch numbers in the **Vanco Batch** drop-down list. Any transactions that are missing batch information are grouped under the heading **Waiting On Batch**.
5. In the **Transaction Type** and **Payment Type** drop-down lists, select the appropriate options.
 - If you select **Gift with Description** for **Transaction Type**, contributors' comments are added. The transactions display in the grid, so you can decide which payment type to use.
 - The **Payment Type** defaults to the online payment type.
6. In the **Select Open Batch** drop-down list, select the batch you want to import the deposits into. To create a new batch, click **Start New Batch**.
7. Under **Not Selected for Import**, transactions not selected for import display.
 - To find out why a transaction was not selected for import, place your cursor over the **red flag**.
 - To match and import a transaction, select the transaction and click **Match Record to Individual** or **Match Record to Organization**. Then, locate the contributor in the Find Person window and click **OK**.
8. Under **Selected for Import**, the transactions to be imported display. If you don't want to import a transaction, select the transaction and click **Deselect Record**. You can import these transactions at a later date.
9. To import the transactions, click **Import**.
10. After the transactions import, click **Close**. The batch totals reflect the imported transactions.

Additional Field Information

Select Open Batch – Selects the [batch](#) into which you want to import the transactions. If you didn't already set up a batch in ACS, click **Start New Batch**.

Select for Importing – Selects contributions to import into ACS.

Match Record to Individual – Matches a transaction not selected for import to a record in ACS People. You can also create a new record in ACS People for new contributors.

Match Record to Organization – Matches a transaction not selected for import to a record in Organizations. You can also create a new record in Organizations for new contributors. This option only displays for Organizations clients.

Import As Anonymous – A red flag displays in the grid for a contributor who had a record that was deleted in ACS. Click **Import As Anonymous** to include the gift with the anonymous giver.

Deselect Record – Clears a record. Deselected records do not import into Contributions, but you can import them at a later date.

Unmatch Record – Unmatches a matched record. When unmatched, the transaction displays under **Not Selected for Import**, and you can match it to a record in ACS People or Organizations.

Reassign Record to Individual – Displays the Find Person window, where you can reassign the transaction to another individual's record.

Reassign Record to Organization – Displays the Find Organization window, where you can reassign the transaction to another organization's record. This option displays only if you own the Organizations module.