


## The Profile Tab - Viewing General Information

On the **Profile** tab in View/Edit Individual, you can view and edit the selected individual's general information.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. In the Find Person window, select the individual you want to add contribution information for and click **View/Edit**.
4. In the View/Edit Individual window, click on the **Profile** tab.
5. Enter any new information or make any necessary changes.
6. When finished, click **OK** to save your changes and exit View/Edit Individual.



### Navigating Individual Records

On the **Profile** tab, you can use the arrows to navigate individual records. In addition, you can press **CTRL + Page Up** or **Page Down** to navigate records.

### Additional Field Information

## Personal Information

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### **Date of Birth**

Enter the individual's date of birth. When you enter a date, the individual's age displays. Age does not display for children under one year old or those with no year entered. You can enter only birth month and day for individuals who do not give their birth year.

### **Marital Status**

Enter the individual's marital status. In Define Lists, you can edit the values listed in the Marital Status drop-down list.

### **Member Status**

Enter the individual's member status. In Define Lists, you can edit the values listed in the Member Status drop-down list.

Member status is often one of the most important fields in an organization. Together with Record Type, it defines the individual in relation to your organization. It is often used in denominational and statistical reports. Some examples of Member Status are: Resident Member, Non-Res Member, Prospect, and Contributor Only.

### **Joined How**

In this field, enter how the individual joined your organization. You can edit these values in Define Lists. Entries might include Baptism, Profession, and Letter of Transfer.

### **Date Joined**

In this field, enter the date the individual joined your organization. A complete date (mm/dd/yyyy) is required. The number of years the individual has been associated with your organization displays beside the field. For individuals who joined less than one year before the current date, the number of years does not display.

### **Record Type**

In this field, enter the individual's record type. Each individual record in ACS must have a record type associated with it. Record type can be Member, Prospect, or Other. You can easily filter records using Record Type in combination with Member Status.

### **Family Position**

In this field, enter the individual's family position. ACS has four family position options: Head, Spouse, Child, and Other. One head and spouse are permitted per family. An unlimited number of children or others can be entered, and [Head and Spouse are defined in People Setup](#).

### **Newsletter**

Enter the newsletter label type to use for this record. This field determines how the newsletter or other newsletter-type mailing is addressed. The default setting is Family, meaning that one newsletter is sent to the family. If the individual should receive his or her own newsletter, indicate it here.

For example, a student away at school should be marked Individual so that a newsletter is sent to him or her. A grandmother living with a family may want to receive her own copy of the newsletter and should be marked Individual.

If no newsletter is desired, or if one name should be omitted from the newsletter label, flag the record as None. For example, a couple in which one person is active in the church and the other is not can be marked as Individual on one record and None on another. The label then prints with the name marked Individual.

### **Deliver by**

Enter the preferred method to deliver the newsletter to this individual. You can select to deliver it by **Mail**, **E-mail**, or **Both**. You must perform a search to list how individuals want to receive their newsletters and send them in the preferred format. E-mail newsletters are not automatically sent when **E-mail** or **Both** are selected.

### **SSN**

Enter the individual's Social Security Number in this field. Formatting to the nine-digit standard with dashes (123-45-6789) is automatically applied. You must also have sufficient rights in [Users and Security](#) to view and edit this field.

### **Entry Date**

This field displays the date the record was first added to ACS. It is controlled by the computer's system date and cannot be edited.

### **Last Changed**

This field displays the date the record you are viewing or editing was last changed. This date changes any time you edit address, phone number, or e-mail information. The date is controlled by the computer's system date and you cannot edit it.

## Contribution Information

### **Record Type**

Enter the Contribution Record Type for the individual in this field. Contribution Records may be Individual or in a Combined Record (Head and Spouse). You must select either **Individual** or **Combined** to enable the Envelope Number field.

Contribution Records are set to **None** when a record is created. If no changes are made at setup and the individual makes a gift that is recorded in the ACS Contributions module, this record type automatically changes to Individual. A record cannot have a Contribution Record Type of None if your Contributions History contains a record of a donation by the individual.

### **Envelope Number**

Enter an envelope number for the individual or click **Next #** to let the system select the next available number.

### **Send Statement by**

Select how statements are sent. The drop-down options are **Mail**, **E-Mail**, **Both**, and **None**.

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You can search and filter on the **Send Statement by** field. This provides you a list of contributors and how they want to receive their statements. For the Plain Paper Statements and Charitable Tax reports, selecting **Ignore Send Statement Flags in Contributions** overrides the **Send Statement by selection** in People. You must perform a search to list how contributors want to receive their statements and send them in the preferred format.

### Date Last Contributed

Displays the date of the individual's last recorded contribution.

### Active Contributor

The **Active Contributor** option is automatically selected when a contribution is entered for an individual. It can be cleared if a contributor is no longer active (for example, when a contributor moves out of town or dies). In those cases, the record cannot be deleted if there are contributions for the current year. If you clear this option, the contributor is not included in statement printings, extracts, and lists unless the option to include deactivated contributors is selected.



### Contributions Inquiry by Individual

Click this button to access the Contributions module.

## Contact Information

### Address

If you have an active Internet connection, clicking this link opens your browser and connects to the Yahoo!® mapping site.

### Phone Number

Click to open Phone Dialer and call the individual from your computer.

### E-mail

You can click this link to compose a new e-mail in your default e-mail program. The selected individual's preferred e-mail address displays. On the Contact Information tab, you can change the preferred e-mail address or send an e-mail to one of the individual's other e-mail addresses.

## Primary Affiliation

### Organizations

When you add an individual as an organization staff member, the primary organization the individual is associated with displays in the Primary Affiliation area. If the organization has a PIN, it displays in parentheses after the name. Individuals are associated with organizations on the **Staff Positions** tab.

## Fast Tools

ACS provides the following fast tools on the main personal tab:



### View Change Log

Click to view changes made to the individual's record.



### Copy to Clipboard

Click to select the name and address style that you want to copy to your clipboard. You can then open your word processing program and click **Paste** to paste the address into the document.



### Send Letter

Choosing this option will launch the ACS Mail Merge program, which ties to Microsoft® Word®. You may create a single letter or merge to a letter or another document you've previously created.



### Print Individual Profile

Click to print a copy of the Individual Profile report. This report includes the information from the Profile tab as well as the individual's preferred contact information, social media information, and preferred lists.



### Edit Checkpoint Information

Click to edit the Bar Code, Individual Note, or Pager Number assigned in Checkpoint to the currently selected individual. The **Edit Checkpoint Information** option is available only if the current user has been assigned all rights to the **Add/Edit Individual Information** option in Utilities. See [Checkpoint Security Rights](#) for more information regarding user rights.

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