



## **Quick Start Manual Local Field Edition**

General Conference of Seventh-day Adventists  
[membership.adventist.org](http://membership.adventist.org)

## DOCUMENT RELEASE NOTES

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*\*1 - Expanded explanation*

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## **1. INTRODUCTION**

This edition of the Quick Start Manual focuses on the primary tasks of the conference or mission membership clerk within the Adventist Church Management System (ACMS). This manual assumes that the conference/mission membership clerk is already familiar with the membership processes outlined in the “Quick Start Manual - Local Church Edition” such as searching for and adding new members, updating a church address, etc.

If you need assistance with the ACMS program contact your local ACMS support team. If you are not sure who your support representative is, contact your union membership clerk for assistance.

## **2. MEMBERSHIP MANAGEMENT**

The ACMS system has been designed to facilitate the organization and management of Adventist church members at the local church. Local church clerks can be provided access into the ACMS program to enter new baptisms, update member records, initiate transfer requests and respond to transfer requests from other churches, as well as updating their church’s address and contact information and officers.

However, there will be many churches which, for various reasons, do not have a church clerk using the ACMS program directly. In those cases, the church clerks need to continue reporting their membership information to the conference or mission—preferably on a monthly basis or even more frequently as determined by the conference/mission—and the conference/mission membership clerk will enter the church’s membership information into the ACMS program on behalf of the local church clerk.

So, the conference or mission membership clerk will have two sets of responsibilities within their territory regarding basic membership management: overseeing and assisting local church clerks who are using ACMS themselves AND entering the membership information into ACMS for those churches that do not have a clerk using the program.

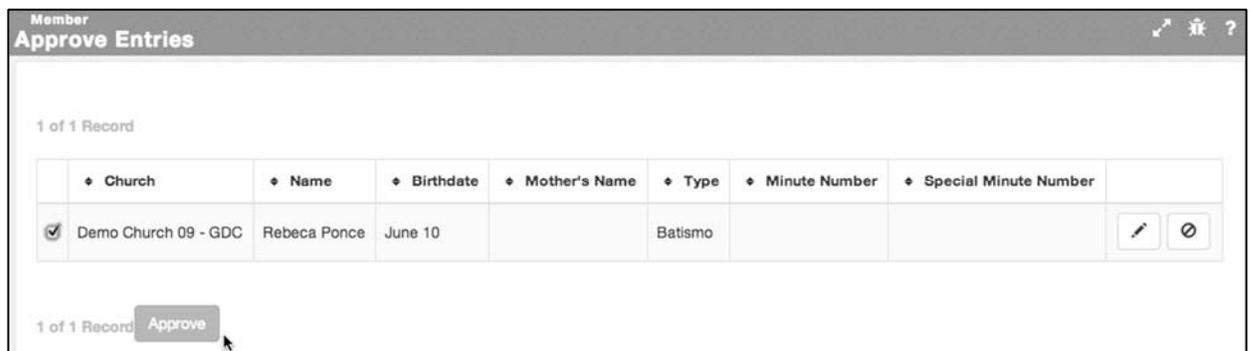
### **2.1. Assisting Local Church Clerks Using ACMS**

Local church clerks may have questions about entering baptism information, initiating a transfer request, or other functions related to managing their membership records in ACMS. The conference or mission clerk needs to be able to assist in those cases and encourage and support the volunteer clerks in their membership ministry and willingness to embrace new processes and procedures.

In addition, some conferences or missions have the responsibility of approving new baptisms that the local church clerk has entered. In these cases, you must check for new entries regularly and determine whether they can be approved. To do this, go to the Approve Entries page found under the Member menu:



You have the option to view and edit the baptism information by clicking the edit button  or to deny this baptism entry by clicking the cancel button . To approve new baptisms, click in the box to the left of the appropriate names and click the Approve button:

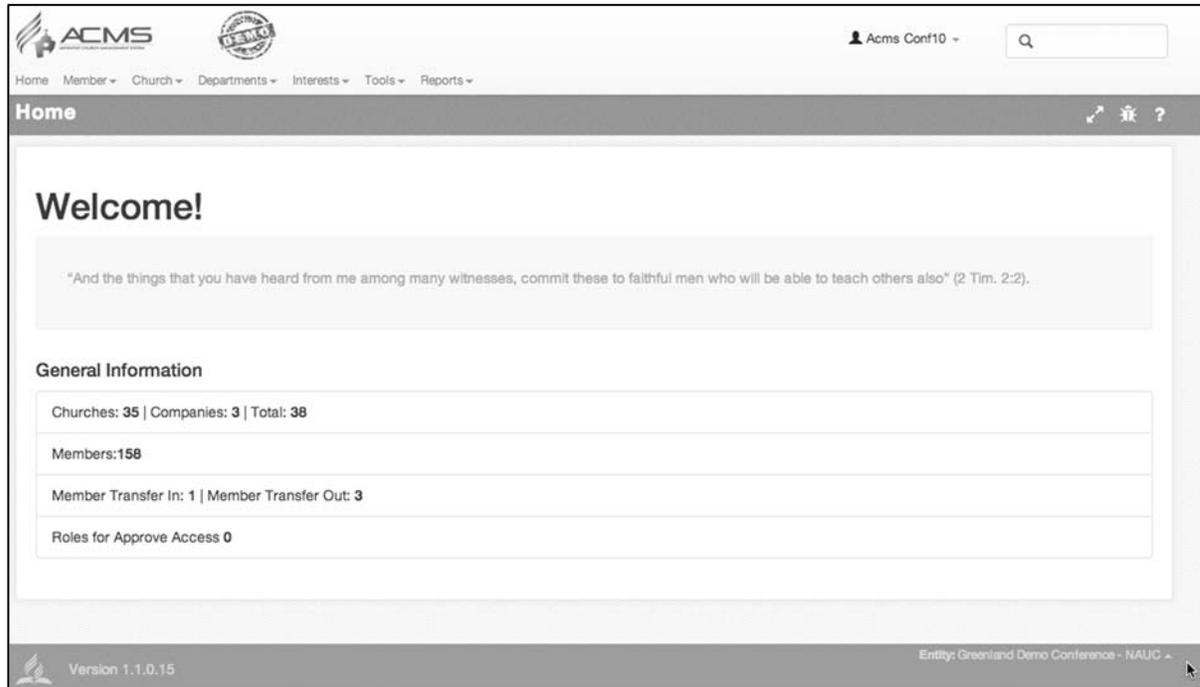


After the baptisms have been approved, the members will be Active rather than Inactive.

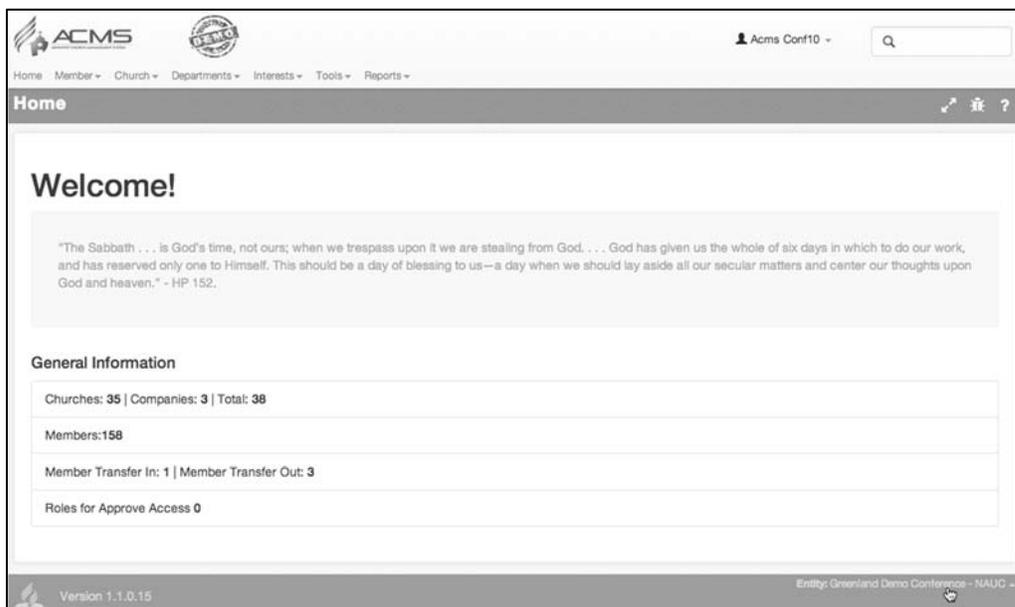
## 2.2. Entering Information for the Local Church

When church clerks report membership information directly to you, rather than entering it themselves in ACMS, you need to enter that information on behalf of the clerk into the ACMS program. For most items, the process to enter or update the information will be exactly as outlined in the "Quick Start Manual – Local Church Edition". That manual contains the needed instructions in the "Membership Management" section.

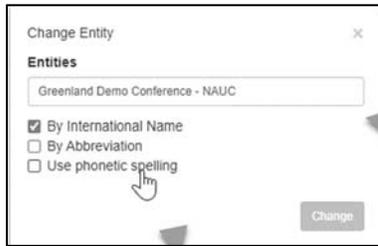
However, in order to **enter a new member** or to **initiate a transfer request**, you must **change your entity indicator** in ACMS. Your current entity indicator is always displayed in the lower right corner of the screen. In the example below, it is showing “Entity: Greenland Demo Conference – NAUC”:



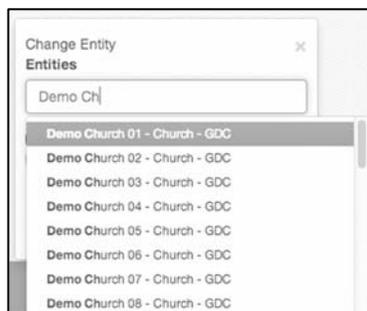
If you leave the entity indicator as your conference or mission, you will not be able to add new members or initiate transfer requests; those options will not be displayed on your screen. You must first click on your entity’s name in that lower right corner:



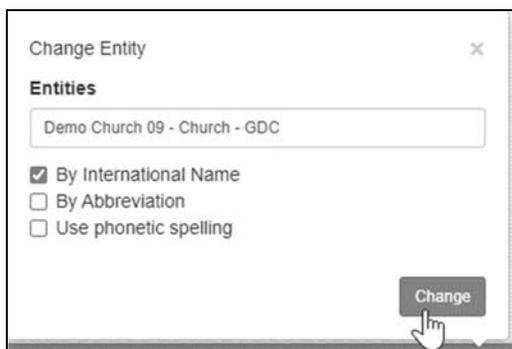
Clicking on your entity name will bring up the “Change Entity” window:



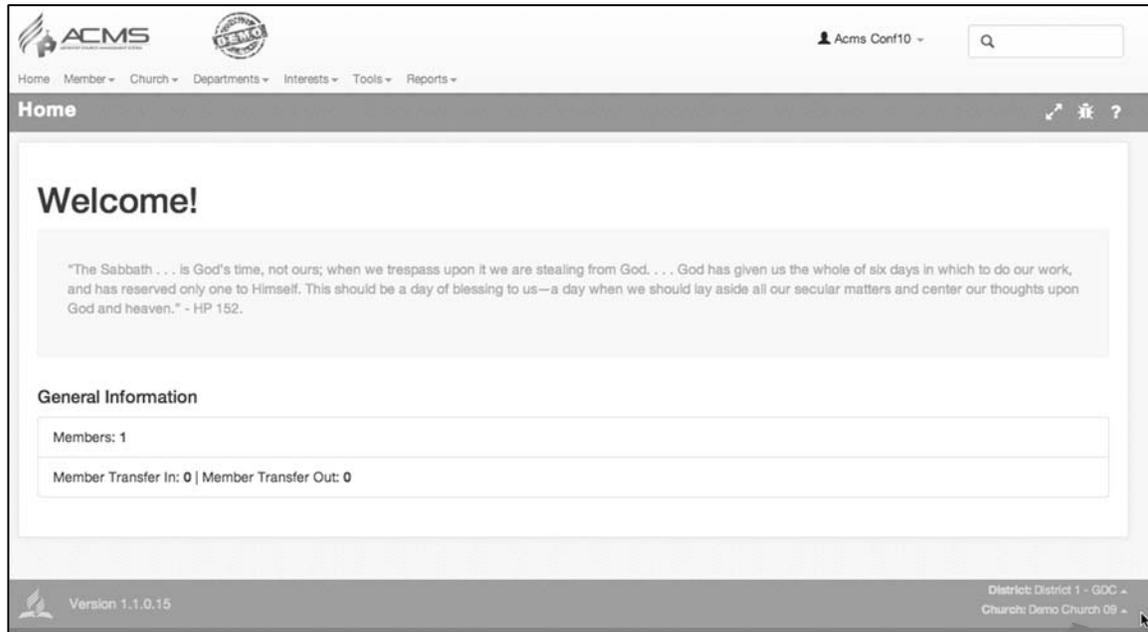
Click in the Entities field and begin typing the name of the church you need to enter membership information for:



Scroll through the displayed list and click the church you need in order to select it, and click the “Change” button:



The Home page will now display, and your entity indicator will show that you are working as the local church that you selected:



Now the “New” option will display in the Member section and the “Search Members” function will be available in the Transfer section. Prior to making this entity change, those functions are not available to you.

**NOTE: After entering information for a given church, you will need to change your entity indicator to the next church you need to enter information for, or back to your conference/mission in order to have the conference or mission clerk functionality. If you are wondering why options aren’t on your screen as you expect them to be, check your entity indicator to be sure that you are accessing ACMS through the correct entity.**

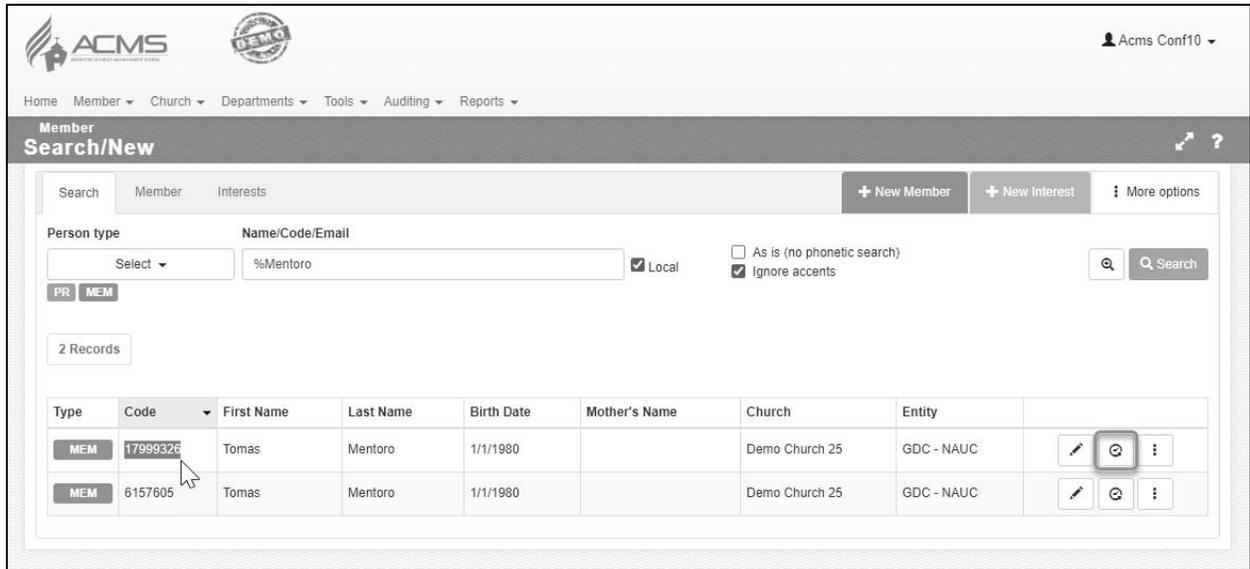
### 2.3. Duplicate Members

Occasionally, duplicate members will be found in the membership program. They may have been imported from a previous computer system, or a clerk may have inadvertently added someone a second time. Church clerks will come to you if they discover this error in their local records.

There are two ways to resolve a duplicate member: **Undo** the last transaction OR **Merge** the two records.

To determine the best course of action, some research will need to be done. Search for the member and click the  button next to the records to see the **history** associated with each record to try to determine how a duplicate came to be.

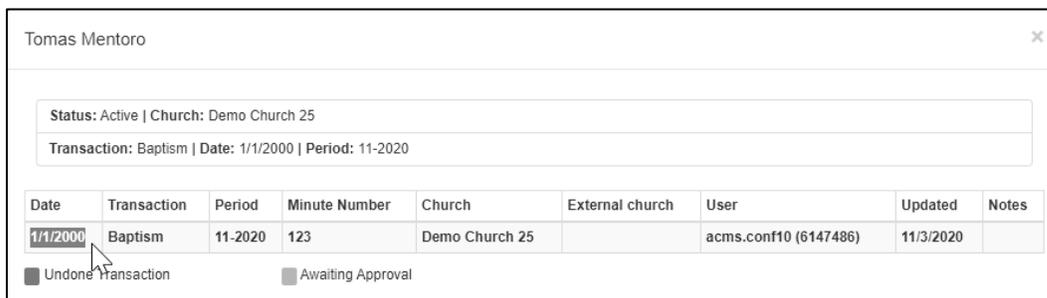
*TIP: The member with the highest “Code” will be the record added to ACMS most recently. In the example below, the record for Tomas Mentoro with the code “17999326” was entered after the one with the smaller code:*



The screenshot shows the ACMS Member Search/New interface. The search criteria are: Person type: Select, Name/Code/Email: %Mentoro, Local: checked, As is (no phonetic search): unchecked, Ignore accents: checked. The search results show 2 records:

Type	Code	First Name	Last Name	Birth Date	Mother's Name	Church	Entity	
MEM	17999326	Tomas	Mentoro	1/1/1980		Demo Church 25	GDC - NAUC	  
MEM	6157605	Tomas	Mentoro	1/1/1980		Demo Church 25	GDC - NAUC	  

In looking at the history associated with the records, you can determine whether you can proceed to **Undo** or **Merge** this person, or whether discussions need to take place administratively to determine whether a vote needs to take place at the local church to effectively take this person out of the membership roles or whether the technical process can proceed without that vote. Here is the history of the record entered most recently.



The screenshot shows the history window for Tomas Mentoro. The status is Active | Church: Demo Church 25. The transaction is Baptism | Date: 1/1/2000 | Period: 11-2020. The history table shows the following transaction:

Date	Transaction	Period	Minute Number	Church	External church	User	Updated	Notes
1/1/2000	Baptism	11-2020	123	Demo Church 25		acms.conf10 (6147486)	11/3/2020	

Below the table, there are two checkboxes:  Undone Transaction and  Awaiting Approval.

Now open the history on the earliest record and compare the history for the two records. Notice that the history of both records contains a baptism for this individual on 1/1/2000:

Tomas Mentoro ×

---

Status: Active - Transferring to Agum Demo Church Thirteen | Church: Demo Church 25

---

Transaction: Baptism | Date: 2/1/2013 | Period: 03-2013

---

Date	Transaction	Period	Minute Number	Church	External church	User	Updated	Notes
11/30/2020	Adjustment Out	11-2020	--17999326 - Tomas Mentoro--	Demo Church 25		acms.conf10 (6147486)	11/3/2020	
2/28/2015	Adjustment Out	02-2015	--0 - Tomas Mentoro--	Demo Church 25				
2/1/2013	Baptism	03-2013		Demo Church 25		Acms Conf20	2/7/2014	
1/1/2000	Baptism	01-2015		Demo Church 25		Maria Costa	5/1/2015	
1/1/2000	Baptism	09-2020	2222222	Demo Church 25		acms.conf10 (6147486)	10/19/2020	

Undone Transaction
  Awaiting Approval

If it is determined that both records belong to the same person, there are two possible paths for resolving the **Duplicate Persons** issue:

- If the most recent record was created in a month that is still open, the transaction can be undone, thereby removing the most recent record. See section 2.4 for how the **Undo Transactions** is executed.
- Even when the **Undo Transactions** is not available because the transaction took place more than a year ago, the **Merge People** will be available, see section 2.5.

## 2.4. Undo Transactions

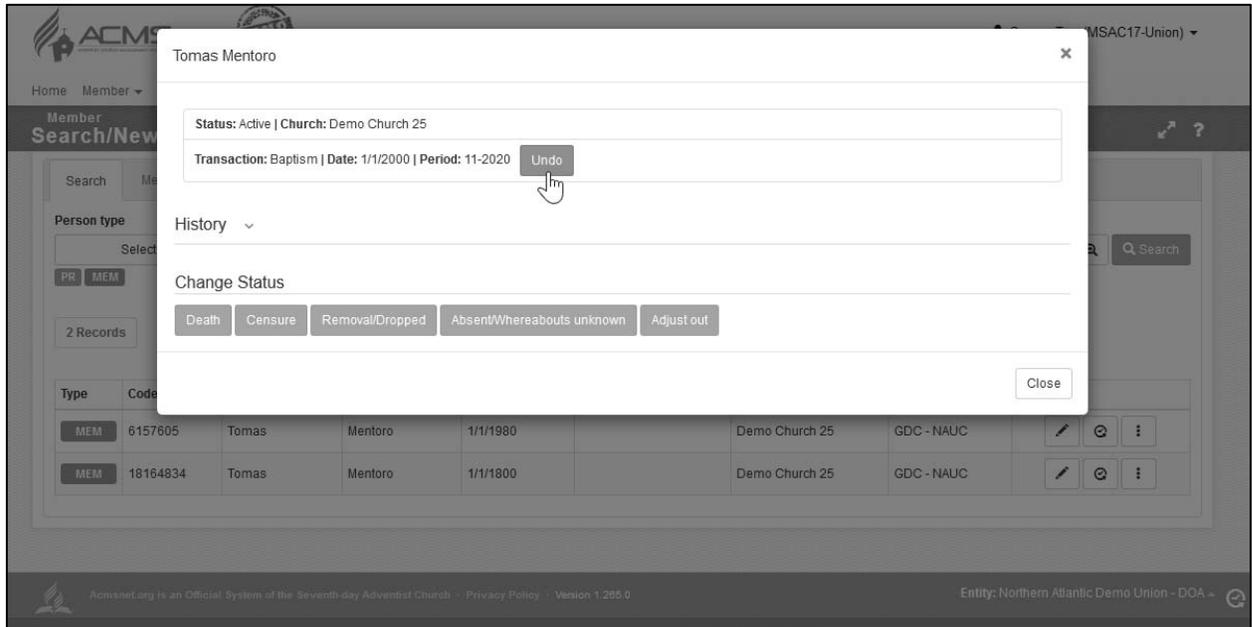
Depending on the configuration of roles in your division, the **Undo Transactions** function is generally available to **Conference Secretary/Clerks** and above. If it appears that an **Undo Transactions** function is the best solution to your issue and you do NOT have the button, contact your union or division clerk for assistance.

If the **Undo Transactions** function is available at your level, search for the record with the transaction that will be undone, click the **More options** button, and select **Transactions**:

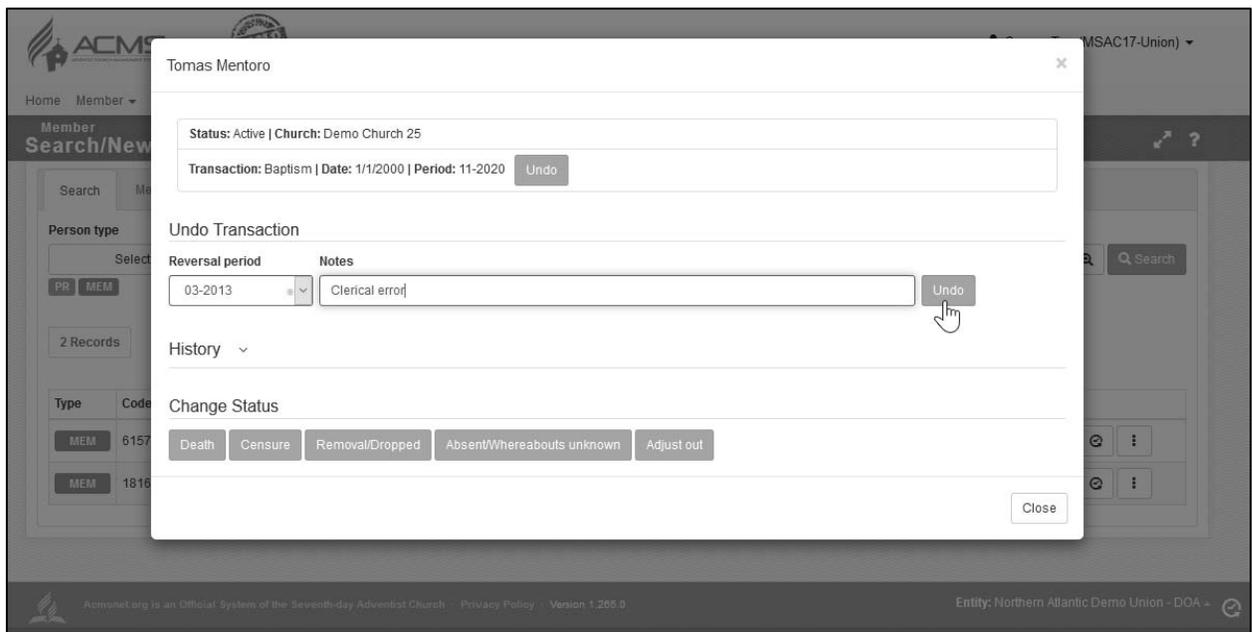
The screenshot shows the ACMS Member Search/New interface. The search criteria are set to 'MEM' and 'tomas Mentoro'. The search results table shows two records for 'Tomas Mentoro' with birth dates 1/1/1980 and 1/1/1800. A dropdown menu is open over the second record, with 'Transaction' selected. The menu options are: Consent, Change to, Transaction, Roles, Merge records, and New user. An arrow points to the 'More options' button (three dots) in the table row.

Type	Code	First Name	Last Name	Birth Date	Mother's Name	Church	Entity
MEM	6157605	Tomas	Mentoro	1/1/1980		Demo Church 25	GDC - NAUC
MEM	18164834	Tomas	Mentoro	1/1/1800		Demo Church 25	GDC - NAUC

If the user's level allows for the **Undo Transactions** function and the transaction is still available to be undone, the **Undo** button will appear to the right of the transaction record. Click the **Undo** button.



You will now be prompted to select the **Reversal period** and enter a **Note**:



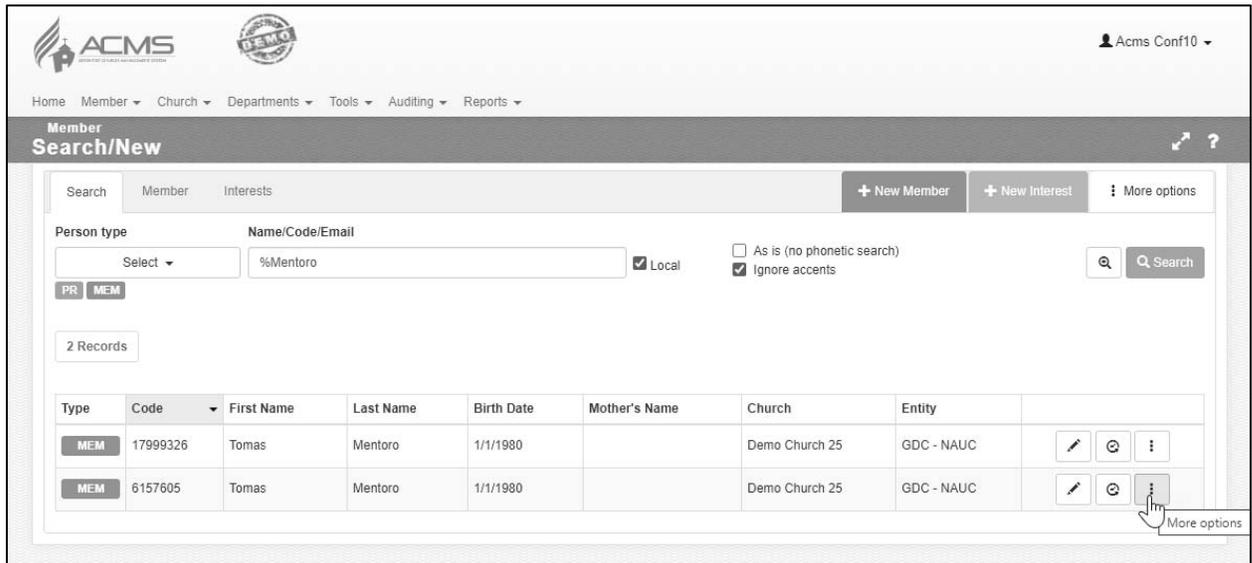
Once you click the **Undo** button, a popup will display asking, “Are you sure?” Click “OK” to finalize the **Undo**, or “Cancel” to back out of the **Undo** function:



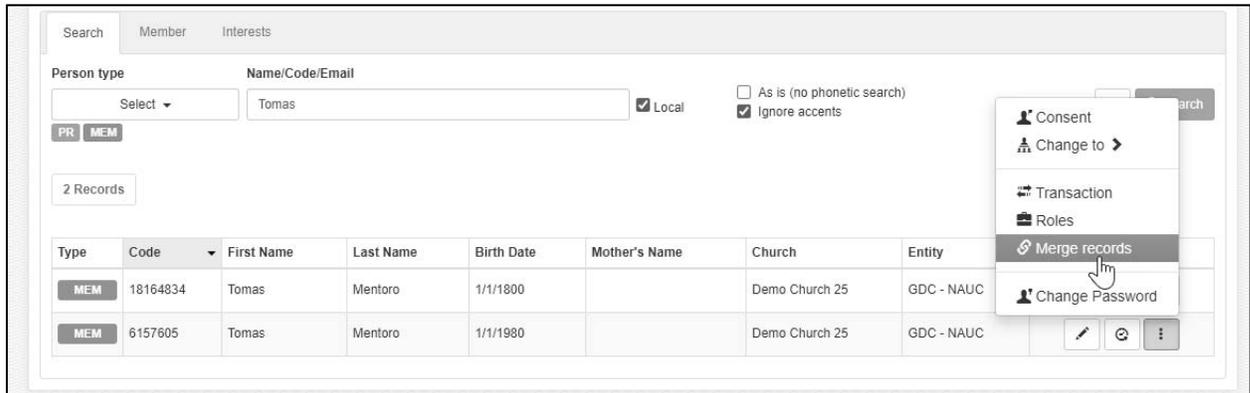
## 2.5. Merge People

When duplicate entries are found for the same member, one option of resolving the issue is merging the two records together. After studying the history (see 2.3 Duplicate Members) and necessary deliberation and consultation, it may be appropriate to merge the two records to resolve the issue of duplicate entries.

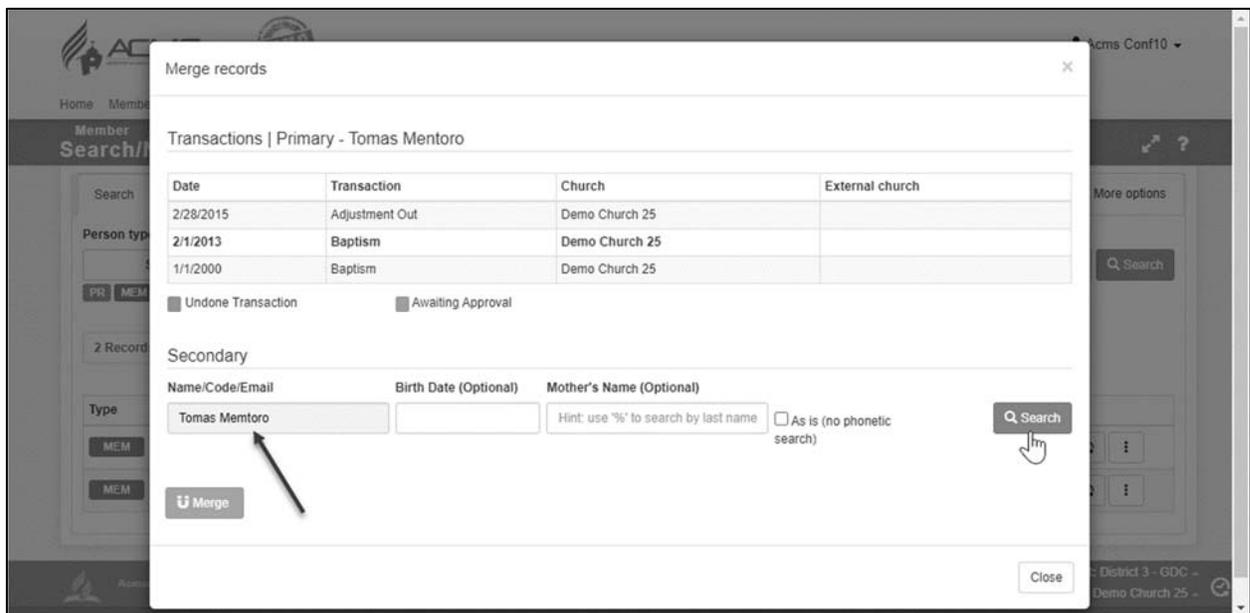
To merge two records, click the **More options**  button next to the record that you want to keep:



Then select the **Merge records** option:



ACMS will display the previous transactions of the person that is going to be merged at the top of the screen. Under secondary, enter the name of the member that needs to be merged and click **Search**:



Click the **Select** button next to the correct record:

Merge records

Transactions | Primary - Tomas Mentoro

Date	Transaction	Church	External church
2/28/2015	Adjustment Out	Demo Church 25	
2/1/2013	Baptism	Demo Church 25	
1/1/2000	Baptism	Demo Church 25	

Undone Transaction     Awaiting Approval

Secondary

Name/Code/Email    Birth Date (Optional)    Mother's Name (Optional)

Tomas Mentoro       Hint: use '%' to search by last name     As is (no phonetic search)    Search

1 Records

Type	Code	First Name	Last Name	Mother's Name	Church	Entity	
MEM	17999326	Tomas	Mentoro		Demo Church 25	Greenland Demo Conference   Northern Atlantic Demo Union	Select

Merge

Close

If you are still certain this is the correct person, click the **Merge** button:

Merge records

Transactions | Primary - Tomas Mentoro

Date	Transaction	Church	External church
2/28/2015	Adjustment Out	Demo Church 25	
2/1/2013	Baptism	Demo Church 25	
1/1/2000	Baptism	Demo Church 25	

Undone Transaction  Awaiting Approval

Secondary

Name/Code/Email: Tomas Mentoro Birth Date (Optional): 1/1/1980 Mother's Name (Optional): Hint: use '%' to search by last name  As is (no phonetic search)

Transactions | Secondary - Tomas %mentoro

Date	Transaction	Church	External church
1/1/2000	Baptism	Demo Church 25	

Undone Transaction  Awaiting Approval

You will be asked to confirm the merge, and ACMS will take a little time as it blends these two records together. Now, when you search for this same person, you will have only one record:

Member Search/New

Search Member

Search

tomas  Local  Active Only  No phonetic search

Hint: use '%' to search by last name only, %smith, for example

1 of 1 Record

Code	Name	Birth Date	Mother's Name	Church	Entity	Active
6157605	Tomas Mentoro	January 01		Demo Church 25	GDC - NAUC	<input checked="" type="checkbox"/>

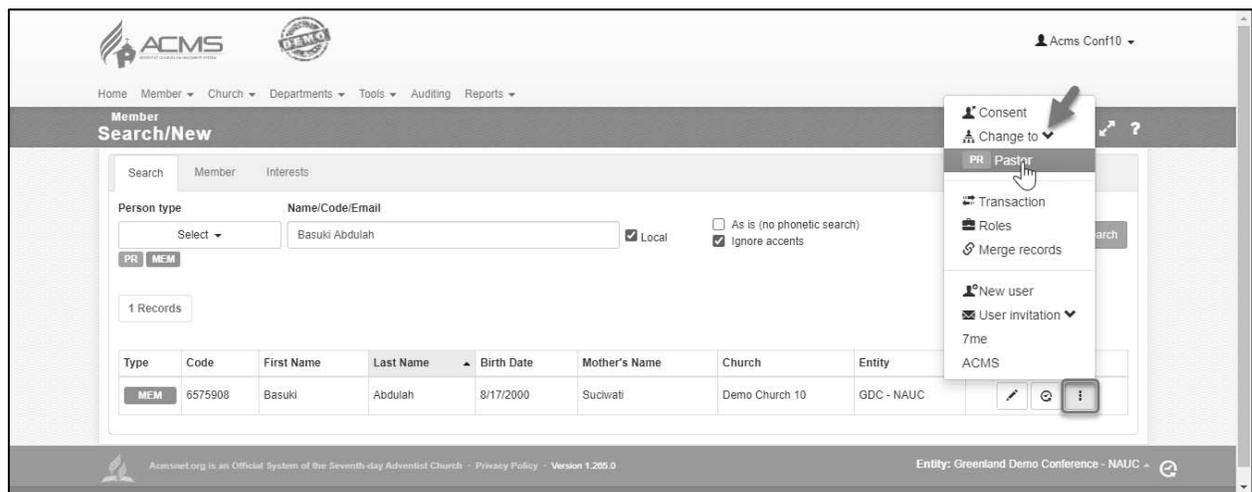
### 3. PASTORS

In order for pastors to have access to use ACMS, and for them to be able to see the information for the churches they oversee, the local field membership clerk will need to complete the following steps.

- Enter the pastor into ACMS as a member. Provide the customary information and make sure to include the pastor’s email address. The email address is how the pastor will be notified how to register with ACMS.
- Indicate the person is a pastor.
- Assign the pastor to a district. Follow the instructions in **Districts**, Section 4.2.
- Sending the pastor a **User Invitation**.

*Tips: Notify the pastors ahead of time to be looking for an email from ACMS, and to check their Spam and/or Junk mail folders in the case it doesn’t show up in their In Box.*

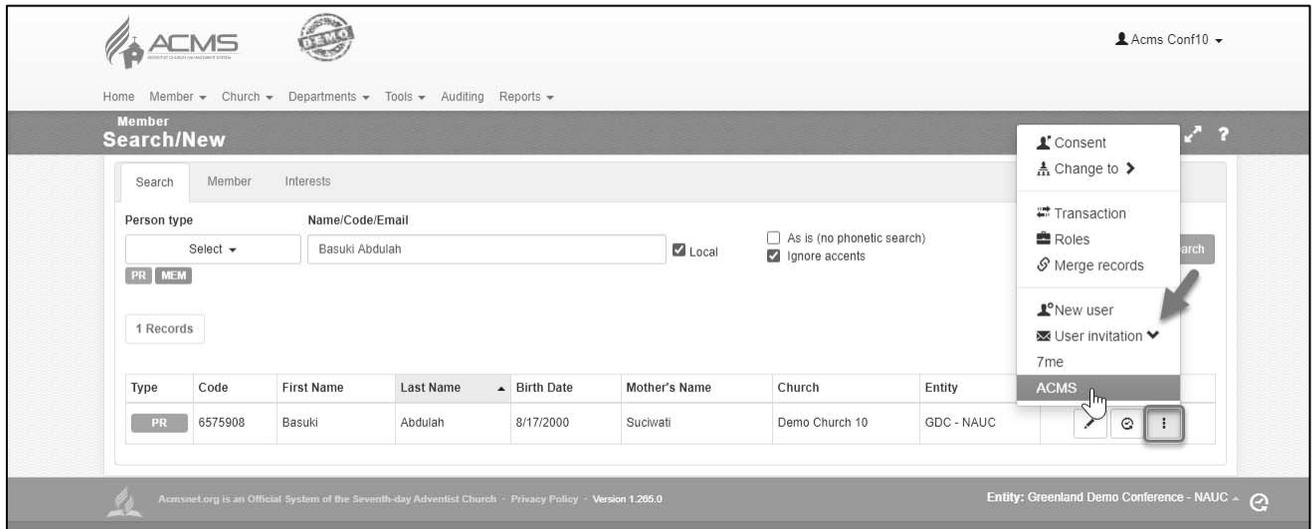
Search for the pastor’s record from the **Member Search/New** page, click on the **More options** (three dots at the far right of the record), click the down arrow by **Change to** function, and select **PR Pastor**. A **Confirmation** popup will ask, “Change type?” Click “OK” to execute the change, or “Cancel” to backout of the change:



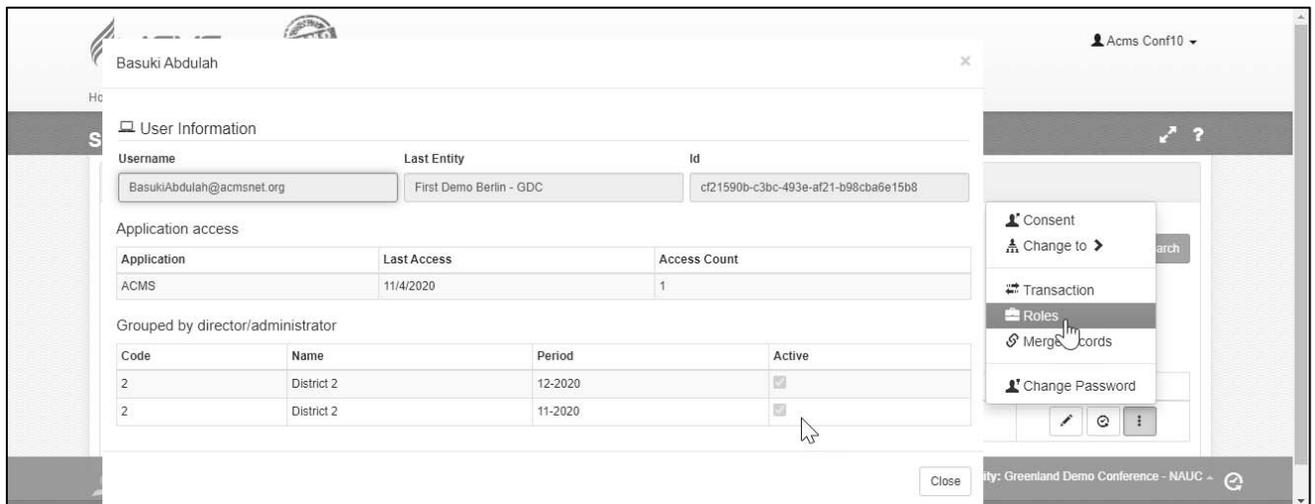
Before a pastor can have access to ACMS, the pastor needs to be assigned a **Role** by being assigned to a district. Follow the instructions in **Districts**, Section 4.2, to make the district assignment.

Once the pastor has been assigned to a district, send a **User invitation**. The invitation email will include instructions to click the included link to register with ACMS.

Again, using the **More options** button, click the down arrow by **User invitation**, and select **ACMS**. A **Confirmation** popup will ask, “Send invitation?” Click “OK” to send, or “Cancel” to backout of the invitation:



To verify that the pastor’s access to ACMS has been setup correctly, you can view helpful information by clicking the **Roles** button, accessible from the **More options** button. Here we can verify the pastor’s **Username**, **Last Access** date, and **Name** of the assigned district:



## 4. REGIONS, DISTRICTS, CHURCHES

ACMS allows churches to be grouped into districts, and districts can be grouped into regions within a local field. Reports can be generated by region or by district in order to provide insights and analysis based on these groupings.

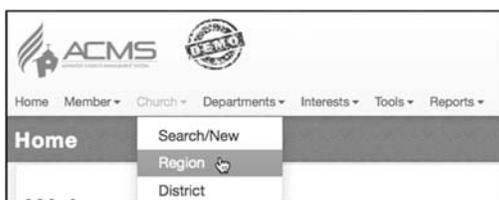
If your local field does not use districts and regions in its territory, ACMS will have all of your churches grouped into a single district called something like “Main District” or “Local Field District”, and this district will be part of the region called something like “Main Region” or “Local Field Region”. Your reports will not be impacted by this default assignment.

However, if you would like to provide pastors access to ACMS to view their records, the churches they can access are determined by their district assignments. So, create the districts based on pastoral assignments, and add the pastor on the district page. When you use ACMS to invite them to register, they will have access to the churches in their district. *See Section 4.2, **Districts** for more information*

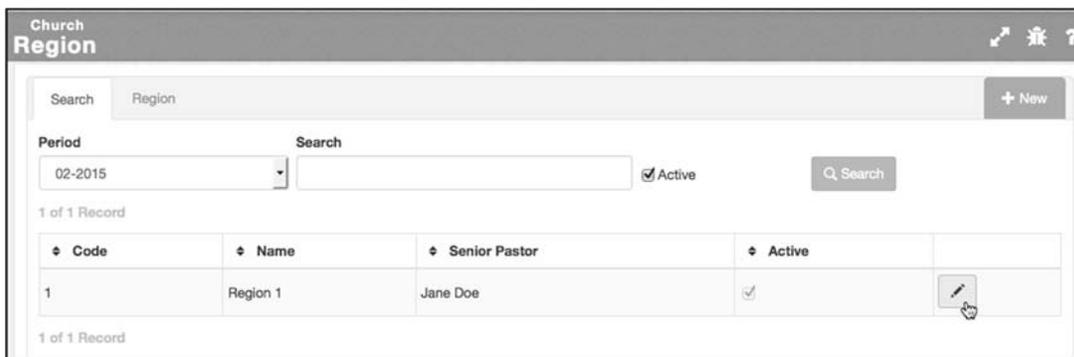
### 4.1. Regions

If your local field uses the concept of “regions” to manage your churches, your ACMS team will help you set up your regions when you first begin using ACMS. However, if your region names change or you add a new region, then you will need to make those changes in the program so that your reports will be accurate.

To manage the regions in your local field, click on the **Region** option in the **Church** menu:

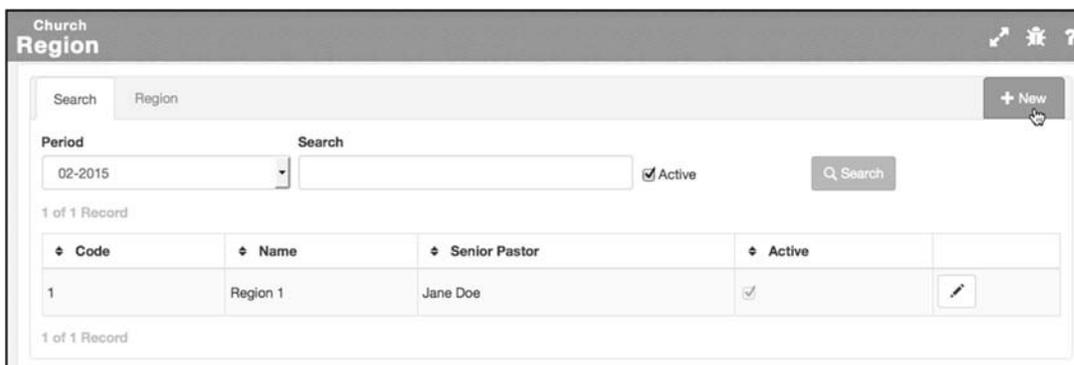


Similar to members, you can click the  button next to a region name in order to edit its name:



The screenshot shows the 'Church Region' management interface. At the top, there is a search bar with 'Region' entered and a '+ New' button. Below the search bar, there is a 'Period' dropdown set to '02-2015', a search input field, an 'Active' checkbox, and a 'Search' button. A table below shows one record with columns: Code (1), Name (Region 1), Senior Pastor (Jane Doe), and Active (checked). An edit icon (pencil) is visible in the rightmost column of the table row.

Or, click on the **New** button to create a new region in your local field:



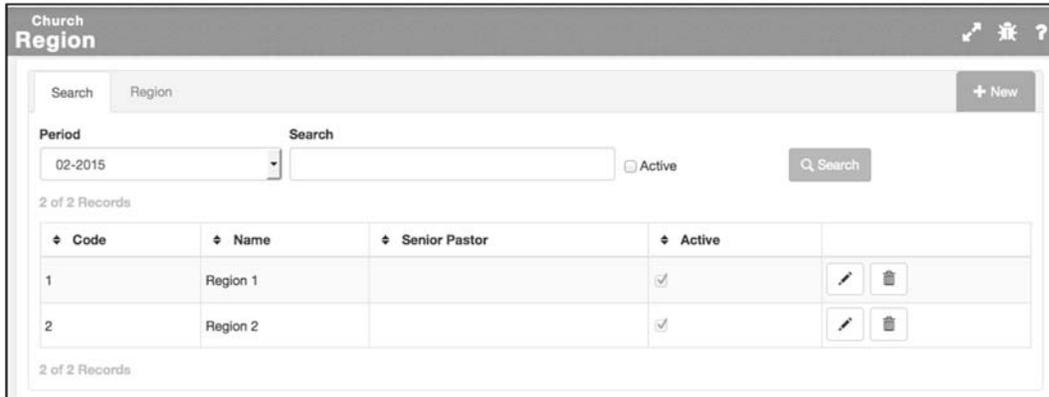
The screenshot shows the 'Church Region' management interface. The '+ New' button is highlighted with a mouse cursor. The rest of the interface is the same as in the previous screenshot, showing the search bar, filters, and the table with one record.

To create the new region, you can let ACMS fill in the Period and Code fields, and just enter the **Name**, click the **Active** box and click **Save**:



The screenshot shows the 'Church Region' management interface. The 'Period' dropdown is set to '02-2015', the 'Code' field contains '3', and the 'Name' field contains 'Region 2'. The 'Active' checkbox is checked. A 'Save' button is highlighted with a mouse cursor.

Your local field will now have an additional region:



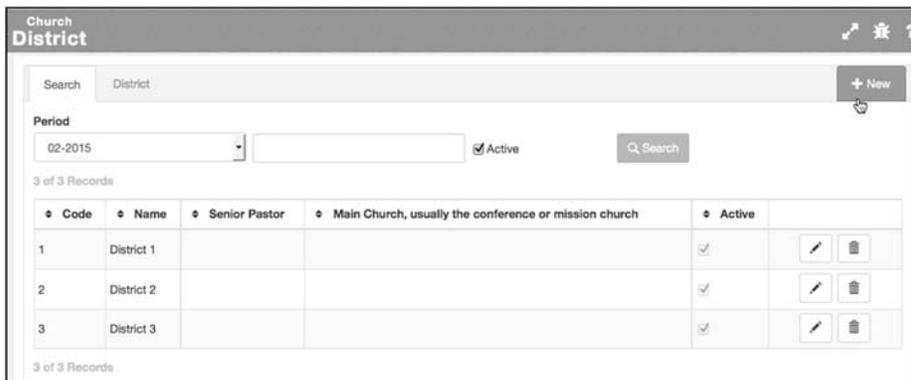
## 4.2. Districts

Managing the districts in ACMS is similar to regions, but this is where the churches get grouped together and pastors are assigned.

To manage the districts, click on the **District** option of the **Church** menu:

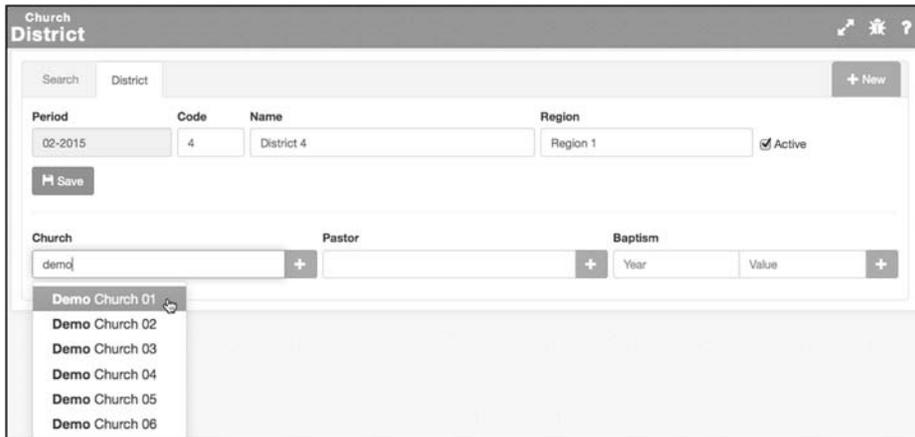


Like regions, you can edit a district from the main district page, or you can create a new district by clicking on the **New** button:



Let the ACMS program fill in the Period and Code. Enter the name of the new district and start typing the name of the region it is in. As you type the name of the region, ACMS will find existing regions with similar names and you need to select the correct one. You must enter an existing region name in this field (if the region you need, doesn't exist yet, refer to Section 4.1 to create it), click the **Active** box, and click **Save**.

Now you need to add the churches and pastors to this district. Start typing in the name of the church and select it when it displays:



The screenshot shows the 'Church District' form. The 'Period' is '02-2015' and the 'Code' is '4'. The 'Name' field contains 'District 4' and the 'Region' field contains 'Region 1'. The 'Active' checkbox is checked. Below the form, there are three input fields: 'Church', 'Pastor', and 'Baptism'. The 'Church' field contains 'demo' and a dropdown menu is open, showing a list of churches: 'Demo Church 01', 'Demo Church 02', 'Demo Church 03', 'Demo Church 04', 'Demo Church 05', and 'Demo Church 06'. The 'Baptism' field has 'Year' and 'Value' sub-fields.

After selecting the church, click the **+** to add that church to the district:



The screenshot shows the 'Church District' form with 'Demo Church 01' selected in the 'Church' field. The 'Pastor' and 'Baptism' fields are empty. The 'Active' checkbox is checked.

Repeat that process for all churches in this district. Then, click in the circle by the church that is the primary church in that district:



The screenshot shows the 'Church District' form with 'Demo Church 01' and 'Demo Church 02' listed below the 'Church' field. Each church name has a radio button next to it. The radio button for 'Demo Church 01' is selected, indicating it is the primary church.

Follow the same steps to indicate the pastors for this district (see Section 3 to add pastors):

The screenshot shows the 'Church District' form. The 'Period' is set to '02-2015', 'Code' is '4', 'Name' is 'District 4', and 'Region' is 'Region 1'. The 'Active' checkbox is checked. Below the form, there are sections for 'Church' and 'Baptism'. The 'Church' section has a dropdown menu with 'Demo Church 01' selected. The 'Pastor' field is populated with 'Tomas Mentoro'. The 'Baptism' section has 'Year' and 'Value' fields, both with dropdown menus.

Baptism goals for the year can be entered on this page as well. An updated search of the districts shows some of the changes we made to District 4:

The screenshot shows the 'Church District' search results. The 'Period' is set to '02-2015' and 'Active' is checked. A search button is visible. Below the search bar, it says '4 of 4 Records'. The table below shows the following data:

Code	Name	Senior Pastor	Main Church, usually the conference or mission church	Active	
1	District 1			✓	[Edit] [Delete]
2	District 2			✓	[Edit] [Delete]
3	District 3			✓	[Edit] [Delete]
4	District 4	Tomas Mentoro	Demo Church 01	✓	[Edit]

At the bottom of the table, it says '4 of 4 Records'.

*Tip: To move a church from one district to another, search for the new district and click the  button beside that district. Use the steps above to add the church into this district. When it is added to the new district, it will automatically be taken out of the old district.*

### 4.3. Churches

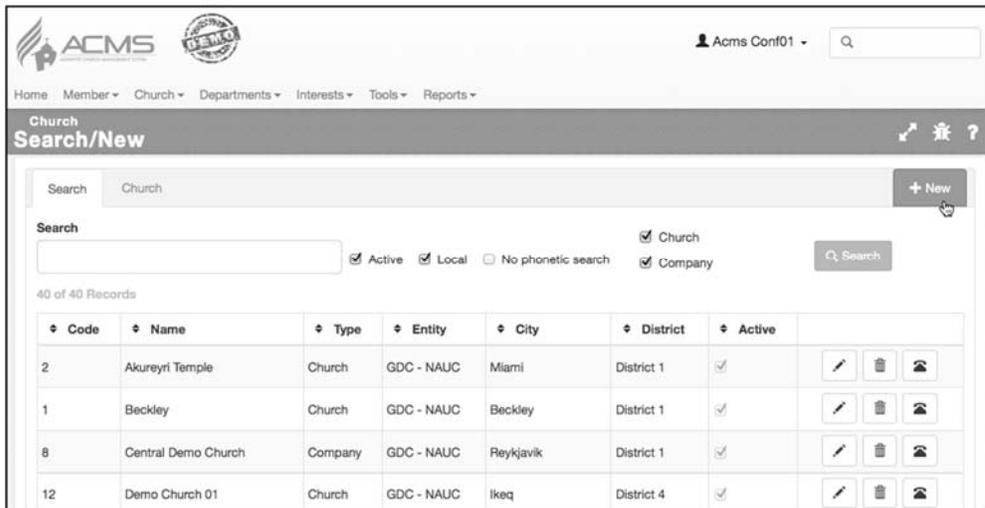
Part of the responsibilities of the local field membership clerk is to be sure that the churches in ACMS accurately reflect the churches in your territory.

To manage the churches in your local field, click on the **Search/New** option of the **Church** menu:



A list of the current active churches in your territory will display and you have the option to edit a church—changing its name, address, or even closing it, delete it (if it doesn't have any members or history), or just view its contact information.

To add a new congregation, click the **New** button:



Be sure to select the correct **Type** for this new congregation (**Church, Company**), enter its name, select the correct **District**, and **Ethnicity**. Enter the date the Executive Committee voted to create this congregation and the minute number of that vote. Fill in the remaining fields, including selecting the district, and click Save at the bottom of the screen:

You will now have a new church that can receive members.

## 5. MONTHLY RESPONSIBILITY

A major part of the conference or mission membership clerk’s responsibilities is to ensure timely reporting of membership information. This involves not only being sure that church membership information has been entered--either by the local church clerk or by the conference/mission clerk—but also the administrative task of “closing the month”. Once the month has been closed in ACMS, monthly reports are immediately available for conference/mission and union personnel. Timely closing of the months helps facilitate the required reporting within all entities of the Seventh-day Adventist Church, from your level up through your union, your division and to the General Conference.

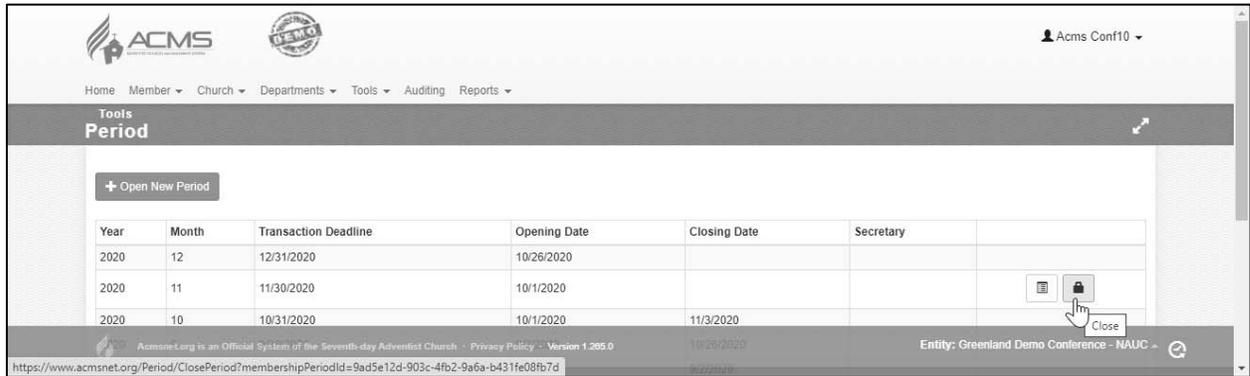
### 5.1. Closing the Month

Prior to the monthly deadline as established by your union, click on the **Period** option under the **Tools** menu:



The Period page displays a list of previously closed months, with the most recently opened months at the top of the list. Typically, if months have been closed consistently and on time, the first month in the list will be the CURRENT calendar month.

The next entry is for the previous month. Once your deadline has arrived—as established by your union—it is time to close that previous month. To close a month, click on the **Close** button (looks like a padlock):



## 5.2. Opening a Month

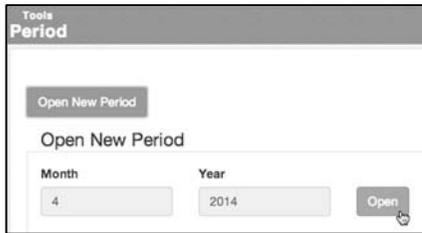
When a month is closed, a new month needs to be opened. However, bear in mind that ACMS will not allow more than three months to be open at the same time. So, if you have gotten behind in closing your months and are now ready to get caught up, you will need to close the old months and may need to open new months up through the current calendar month.

The other time you will likely need to do this is in the demo, or practice, site. If you are conducting a church clerk training session, you will want to make sure that the demo conference or mission that you will be working with during the training session has the **current calendar month open**. This will help your church clerks when they are entering information in the demo site since they will be able to enter current dates as baptism dates without getting warnings about which month is currently open.

To open a month, follow the instructions in Section 3.1 to close any months that can, and should, be closed. Then, click on the **Open New Period** button:



ACMS will automatically calculate the next month that can be opened and display that information. Click the **Open** button to open that month:

The image shows a screenshot of a web application interface titled "Tests Period". At the top, there is a button labeled "Open New Period". Below this, there is a section also titled "Open New Period" which contains two input fields: "Month" with the value "4" and "Year" with the value "2014". To the right of these fields is a button labeled "Open".

Continue opening and closing months until the current calendar month is open.

## 6. USER ADMINISTRATION

To add a new church clerk to the ACMS program, **make sure the clerk's member record has his or her email address entered in their person profile**. If their email address is not entered, or is incorrect, they will not receive the email messages with instructions for registering their ACMS account.

Then, follow the instructions in the "Quick Start Manual – Local Church Edition" for "Church Officers". Add the individual as the new clerk ("Secretariat Department", role of "Secretary") and enter the appropriate starting and ending dates as indicated in the Local Church manual. Be sure to check the "ACMS access" and "Authorized" boxes; checking these boxes is what prompts the ACMS program to send the email to the user with instructions for registering. When they register, they will select their own username and password.

## 7. CONDUCTING CHURCH CLERK TRAINING

### 7.1. Prior to Training

Determine a location for your church clerk training session and be sure that you will have Internet access and ask what the wireless password is, if any.

Print out copies of the "Quick Start Manual – Local Church Edition" for each clerk that will be attending.

Know the usernames and password of the practice church clerk accounts and the practice conference/mission account that you will be using during the training session. Contact your union membership coordinator if you are unsure what these are or how to set up new ones.

## 7.2. Day of Training, Before Training Starts

Log in to <http://www.acmsnet.org> with your demo conference/mission membership clerk account and follow the instructions in Section 3.1 and 3.2 to verify that the current calendar month is open in your demo conference/mission. If necessary, close and open months until the current calendar month is open.

## 7.3. During the Training Session

Distribute the “Quick Start Manual – Local Church Edition” as well as demo usernames and passwords. Have the clerks work together in groups so that you have a maximum of ten practice clerks logging in at a time. It is very difficult to manage more than ten users in a training session, so have them work together if necessary.

Have the clerks work through the examples in the Quick Start manual (starting with logging in), adding themselves (or some other made up names) as new members\*. When they get to the Transfer section, they can transfer the newly added members between themselves.

Have the clerks view available reports and point out that they will no longer need to manually report membership information to you if they are using the ACMS program.

Be sure to stress the importance of not sharing passwords and let them know that they can contact you for assistance in using the program.

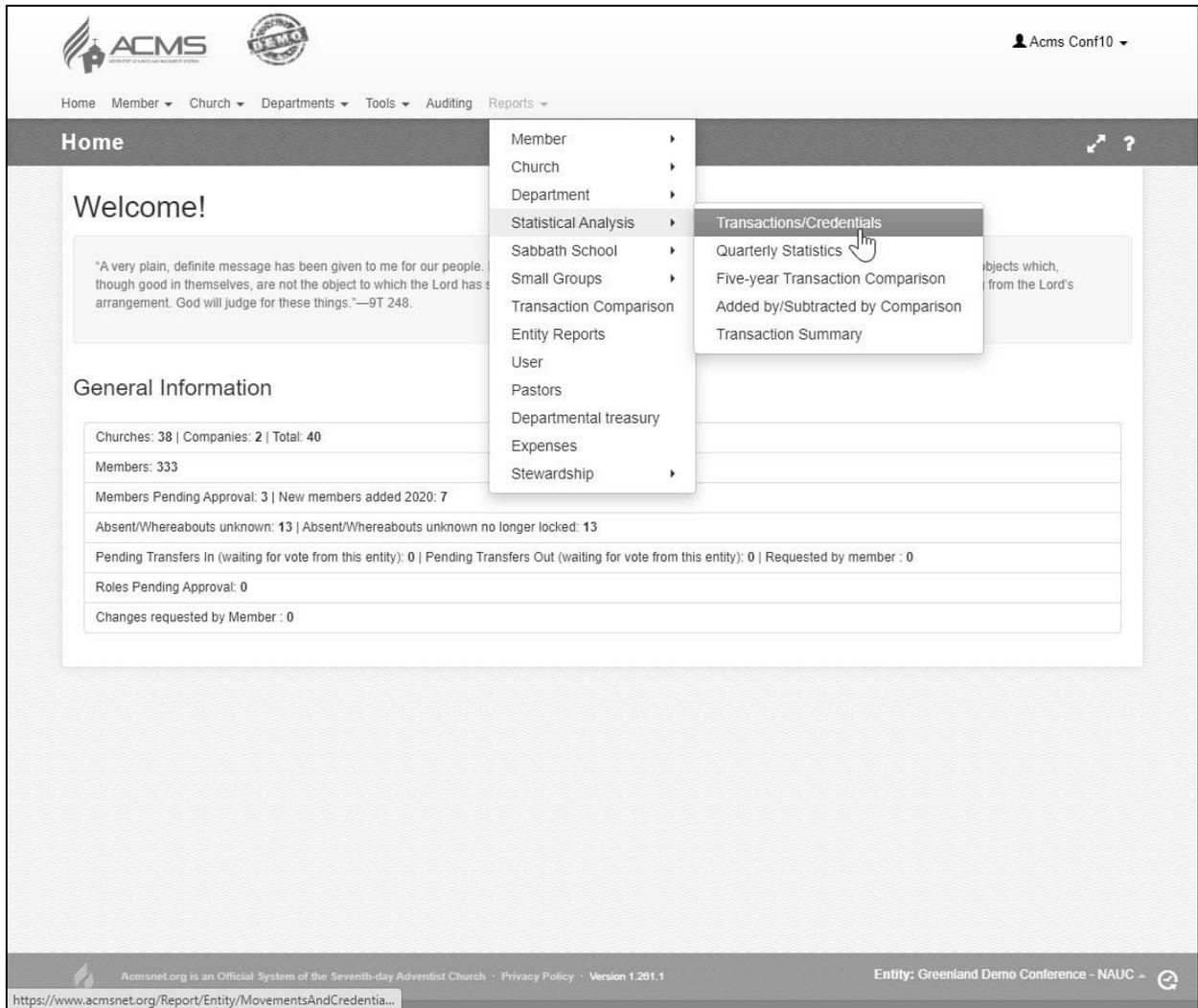
Outline your timeline for setting up them as new users in the live site and thank them for their willingness to serve as part of the Seventh-day Adventist Church’s membership ministry.

**\*NOTE: Your conference/mission may be set up in ACMS to require conference/mission authorization for new baptisms. If that is the case, your clerks will not see their new baptisms in their Active member lists. They can uncheck the “Active” box to see them, but you need to follow the steps in Section 2.1 to authorize these new members so that they will be available when the clerks are ready to practice transfers.**

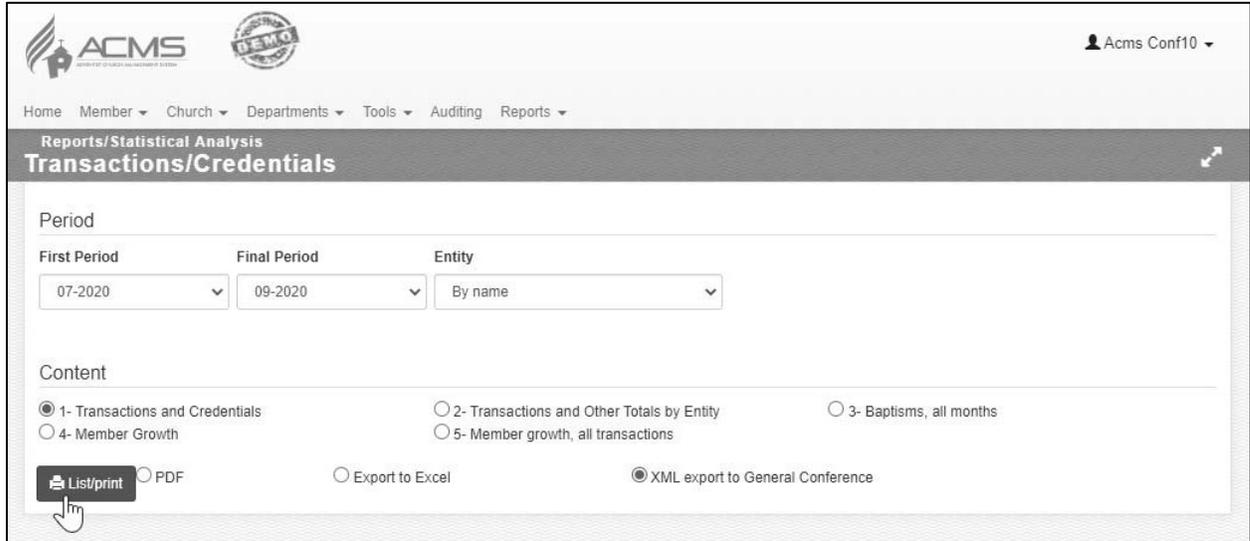
## 8. IMPORT ACMS REPORT INTO MYREPORT/JORDAN

ACMS provides conferences, unions, and divisions an option to export quarterly statistical information to their local computer which can then be imported for the GC quarterly reports via **MyReport/Jordan**, saving the labor of entering the information manually. Divisions, unions, and conferences will determine administratively which level will transfer the statistics: each conference, each union, just the division, or a combination.

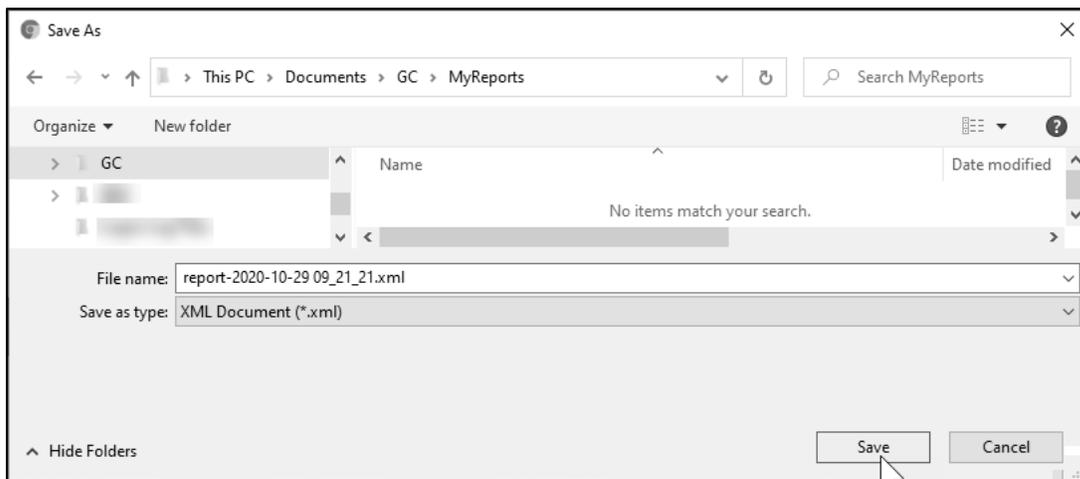
To access the download function select menu item **Reports** → **Statistical Analysis** → **Transactions/Credentials**:



Set **First Period** to the opening month of the quarter and **Final Period** to the last month of the quarter. Leave **Content** set to the default **1 - Transactions and Credentials**, and select **XML export to General Conference** as the **List/print** type. Then click the **List/print** button:



Depending on your web browser settings, the download will either automatically download to your download folder, or you may be prompted to choose the location to save the XML file to your local computer:



You may also choose to save a copy of the quarterly report as a PDF or Excel file.

Log into Jordan and choose the **Import XML** option for submitting your report. Click the **Choose File** button and select the **XML export to General Conference** file downloaded and saved from ACMS.

Using this option you will be able to upload information into My Report using an XML file. The XML file has to be formatted based on the indications found in this document: XML-Doc.pdf

You have to click on the button **Choose File** to select the formatted XML file you want to upload. Click on the button **Submit** to begin the uploading process.

After processing your XML file you have to verify and approve the imported information using the **Data Entry Control** option. At this point you could also correct or add information.

no file selected

Only Test XML without importing data.

Close Units after importing.

## 9. DISTRICT TRANSFERS

Contact your ACMS support person for assistance with the transfer of districts to another local field. Your support person will then contact the GC ACMS support team to make the requested **District Transfers**.

In order to expedite your district transfer request, please include the following information in your request:

- The name of the originating local field
- The name of the destination local field
- The name of the district(s) to be transferred

*Tip: When providing district names, please use the names as they are in ACMS in order to limit the possibility of confusion. Additionally, if single congregations are to be moved, group them into a temporary district so they can be transferred as a unit.*

## **10. TROUBLESHOOTING**

### **10.1. Logging in – “User has no access”**

Check to be sure the person still has a position or church office in ACMS and that the expiration date of their role hasn't passed.

### **10.2. Save – “Open period doesn't exist”**

Sometimes a clerk will try to make an entry for something that just happened, but the local field membership clerk hasn't "opened" the current month yet. For instance, if a baptism happened in April, but the local field only has March "open", this error will display. See Section 5 regarding opening and closing months.

***Go ahead and experiment with the Tools and Reports menu options –  
there are many more features available to you!***