

Using the Online List Manager (OLM):

Once you are logged in to the website, click on the **Online List Manager** button to access your member information. If you are logged in and do not see the **Online List Manager** button, please contact Customer Service at 800.446.3035 for assistance.



The screenshot shows the AmericanChurch, Inc. website interface. At the top, there is a navigation bar with the company logo and contact information: "999999 / AmericanChurch, Inc. Youngstown, OH 44513 User Logged In: csr@csr.com". Below this, there are three buttons: "Account", "Online List Mgr", and "Contact Us". A blue circle highlights the "Online List Mgr" button, with a blue arrow pointing to it from the right. Below the navigation bar, there is a section titled "Connect to Online List Manager" and "Frequently Asked Questions (FAQ)". The "Connect to Online List Manager" section contains the following text:

Online List Manager

AmericanChurch, Inc. is pleased to announce the addition of Online List Manager. Our customers asked us for a way that they could make changes to their church membership mailing list online and we listened. We are pleased to offer this FREE online service to our valued customers.

What does Online List Manager let me do?

With this new service, our customers can make changes to their membership lists online and view the changes right away. You can make changes, additions or deletions to your membership lists. You can also mark your snowbirds temporarily inactive until they return.

What if I have a new member? Can they receive envelopes right away?

With the click of a button, you can have temporary envelopes sent to your church member within 48 hours. There is no need for your members to wait weeks until the new offering envelope sets are mailed to your members.

What if I need a list to use for a mailing or a printout?

With the report function, you can export your membership file. This will allow you to run labels or print out your list to be used by your church. AmericanChurch can also print and mail your special mailings, Christmas mailings, Easter mailings or appeals. Many times for less than you can do it yourself. Call us at 800-446-3035 for more information.

Once you have clicked on OLM, you will see the screen below. It will default to the lowest order number that you have. Some churches only have one order number.

The screenshot shows the 'Online List Manager' interface for AmericanChurch Inc. The page includes a navigation menu with links for HOME, NEWS, FAQ, HELP, CONTACT, REPORTS, SETTINGS, and ADMIN. Below the navigation, there are filters for 'Order' (set to A123), 'Status' (set to A - Active), and 'Last Name' (empty). There are buttons for 'FILTER', 'ADVANCED FILTER', and 'NEW MEMBER'. A table of members is displayed below, with columns for Env #, Status, Last Name, First Name, Title, Address, City, State, and Zip. Two members are listed: one with Env # 123 and another with Env # 1234, both with Status 'Active', Last Name 'SMITH', and First Name 'JOHN'. A callout box labeled 'Alphabetical' points to a row of letters (A-Z) used for filtering members by their last name.

Filter Options

You may choose to view your member information in a number of ways, using the filter options below:

- **Last Name** – key letters that the member’s last name begins with (ie – Pa would return all members that last names began with Pa)
- **Order** – if you have multiple orders, you may select to view only members from particular orders or view all members from all orders
- **Status** – select to view all members or only active or inactive members
- **Alphabetical** – this bar will allow you to filter your members by the first letter of their last name or view all by clicking AthruZ.
- **Advanced Search** – Allows you to search using several options including envelope #

AmericanChurch, Inc. Online List Manager

Members: 44 Active: 44 Inactive: 0

Order: A123 Status: A - Active Last Name: [] FILTER ADVANCED FILTER NEW MEMBER

A-Z A B C D E F G H I J K L M N O P Q R **S** T U V W X Y Z

| Env # | Status | Last Name | First Name | Title | Address | City | State | Zip |
|-------|--------|-----------|------------|-------|----------------|------------|-------|-------|
| 123 | Active | SMITH | JOHN | | 123 ANY STREET | YOUNGSTOWN | OH | 44513 |
| 1234 | Active | SMITH | JOHN | | 123 ANY STREET | YOUNGSTOWN | OH | 44513 |

Sorting Options

You may sort any of the following Ascending or Descending by clicking on the text:

- Envelope #
- Status
- Last Name
- First Name
- Title
- Address 1
- City
- State
- Zip

How to Add a New Member

- Click the **New Member** button.
- Please fill in all required address fields.
- City and State will populate after filling in the ZIP. If multiple cities are available for the zip code entered, you will have the option to select an alternate city. You can do this by selecting the arrow to the right of the city listed.
- If you assign envelope numbers, you will need to enter the number in the box given. If you want to use the next available envelope number, you will need to press the **Next Env. #** button.
- Make sure that you have the correct order number highlighted.
- When you are completely done adding your member, you will need to press the **Save/Close** button. This action will activate **Auto – Correct**, which will validate the address.
- If you have more than one member to add, you can press the **Save/New** button. **Auto – Correct** will be activated to validate the address. The record will be saved and a new record will be opened for the next member.

Auto – Correct

Provides immediate CASS™ validation on addresses as you make entries.

- An address validation message will appear when you add a new member or change an address on an existing record.

Primary Address has been Standardized.

The Primary Address you entered has been Standardized to meet USPS Requirements.

| Standardized Address | | Submitted Address | |
|----------------------|----------------|-------------------|------------------|
| Address 1: | 525 MCCLURG RD | Address 1: | 525 MCCLURG ROAD |
| Address 2: | | Address 2: | |
| City: | YOUNGSTOWN | City: | YOUNGSTOWN |
| State: | OH | State: | OH |
| Zip: | 44512 6406 | Zip: | 44512 |

OK

How to Change/Delete/Deactivate or Reactivate a Member

- Use the **Advanced Search** to locate the member that you wish to change or delete.
- Click the envelope number of the member that you wish to change or delete. This should open the record for you to make the change.

Changes- You may change:

- Any of the name or address fields.
- Move member to another order number (if you have more than one).
- Envelope number
- Send a starter set
- Click **Save/Close**

Deletions

- Click on the **Delete** button
- You will be asked if you are sure you want to delete this record. You will need to click **Yes**
- Deletions are immediate and permanent

Deactivate/Reactivate (Snowbird)

- Select the arrow in the **Status** box.
- Select **I-Inactive** to stop the member from getting envelopes, but not delete them.
- Select the deadline date for the month that you want the envelopes to begin in the **Reactivate Date** box. (Remember that this is the deadline date, not the date you want them to receive the envelopes.)

The SMITH Family Details

Created: 5/1/2012 2:56:57 PM Modified: 5/1/2012 2:56:57 PM HISTORY PRINT

Name Editor ⓘ

Default Name:
 Last Name: SMITH First Name: JOHN Title:

Envelope #: 12345 Next Env #

Address 1: 123 ANY STREET
 Address 2:

City: YOUNGSTOWN State: OH Zip: 44513 ⓘ

Status: A - Active
 ReActivate: ⓘ

Order: A123 R TEST
 Starter: ⓘ

* Indicates Required Fields

Primary Address Alternate Address ✖ Contact Info

UPDATE SAVE / CLOSE DONT SAVE / CLOSE DELETE

NOTE: Hovering over any question mark displays helpful tips regarding that field. ⓘ

- ⓘ **Starter Set?** – When you have new members and want envelopes in their hands as quickly as possible, we can send them a starter set. A “Starter Set” is a generic offering envelope set with the member’s name and address preprinted on them for each Sunday date. We send these out First Class mail, within 48 hours of our notification, to insure quick delivery to your new members. These are great to use until your member receives their regular packet of envelopes.
- ⓘ **Orders** – If you have more than one order, the member will be added to the order highlighted. To change this selection, click on the appropriate order number.
- ⓘ **Zip Code** – When you enter the zip code, the city and state will automatically populate. This is set up with USPS® standards and is updated on a regular basis by the post office.
- ⓘ **ReActivate Date** – Do you have members that are away for a period of time but plan on returning? Example: Snowbirds that travel south for the winter. You can now mark their status as inactive, but indicate the date they will be returning. We will automatically start sending them envelopes with the next mailing after the reactivation date. Enter the deadline date for the month you want the envelopes to begin.
- ⓘ **Name Editor** – allows you to maintain different names for a parishioner record when the record exists on more than one list (refer to Name Editor document under HELP in the Online List Manager)


Alternate Address

Maintain an alternate address for your members and set begin and end dates for the envelopes to be sent to this address.

- Click on the Alternate Address tab.
- Fill in all required address fields.
- City and State will populate after filling in the zip. If multiple cities are available for the zip code entered, you will have the option to select an alternate city. You can do this by selecting the arrow to the right of the city listed.
- Select **Begin Month/Year** and **End Month/Year** for envelopes (optional).
- Click **Save/Close**



The SMITH Family Details

Created: 5/1/2012 2:56:57 PM Modified: 5/1/2012 2:56:57 PM HISTORY PRINT

Name Editor 

Default Name:
 Last Name: SMITH First Name: JOHN Title:



Envelope #:
 12345 Next Env #




Order:  Starter: 

Address 1:
 123 ANY STREET


Address 2:

City: YOUNGSTOWN State: OH Zip: 44513 -



Status: A - Active 
 ReActivate: 



A123 
 R 
 TEST 



* Indicates Required Fields

Primary Address **Alternate Address**  Contact Info

UPDATE SAVE / CLOSE DONT SAVE / CLOSE DELETE

Address 1: Begin Month/Year:  

Address 2: End Month/Year:  

City:  State:  Zip: -

Primary Address **Alternate Address**

Contact Info

Maintain member's phone, email and fax number on the Contact Info tab.

- Click on Contact Info tab
- Enter Phone, Email and Fax number
- Click **Save/Close**

The screenshot shows the 'The SMITH Family Details' form. At the top, it displays 'Created: 5/1/2012 2:56:57 PM' and 'Modified: 5/1/2012 2:56:57 PM'. Below this are 'Name Editor' and 'HISTORY' buttons. The form is divided into several sections: 'Default Name' (Last Name: SMITH, First Name: JOHN, Title:), 'Envelope #' (12345, Next Env #), 'Address 1' (123 ANY STREET), 'Address 2', 'City' (YOUNGSTOWN), 'State' (OH), and 'Zip' (44513). There are also 'Status' (A - Active), 'ReActivate', and 'Order' (A123, R, TEST) sections. At the bottom, there are tabs for 'Primary Address', 'Alternate Address', and 'Contact Info', with an arrow pointing to the 'Contact Info' tab. Below the tabs are buttons for 'UPDATE', 'SAVE / CLOSE', 'DONT SAVE / CLOSE', and 'DELETE'.

Family Details History

Records additions and changes that are made to a member record.

- Click on the History button from the Family Details screen.
- Changes made to the record are indicated by red text.
- The date of the change and the OLM user are recorded.

This screenshot is identical to the one above, but with an arrow pointing to the 'HISTORY' button located at the top right of the form, next to the 'PRINT' button.

Family Details History - Windows Internet Explorer
 http://olmtest.osvenvelopes.com/olme/FamilyHistory.aspx?FamilyID=10351740

Current Family Details

| | | |
|---|--|---|
| Modified By: customer@aci.com | Created: 5/1/2012 2:13:02 PM | Modified: 5/1/2012 3:06:20 PM |
| Last Name: SMITH | First Name: JOHN | Title: |
| Address 1: 456 ANY STREET | Status: A - Active | Envelope #: 123 |
| Address 2: | ReActivate: | Order # Starter Exempt A123 False False |
| City: YOUNGSTOWN | State: Zip: OH 44513 | |
| Primary Address | Alternate Address | Contact Info |

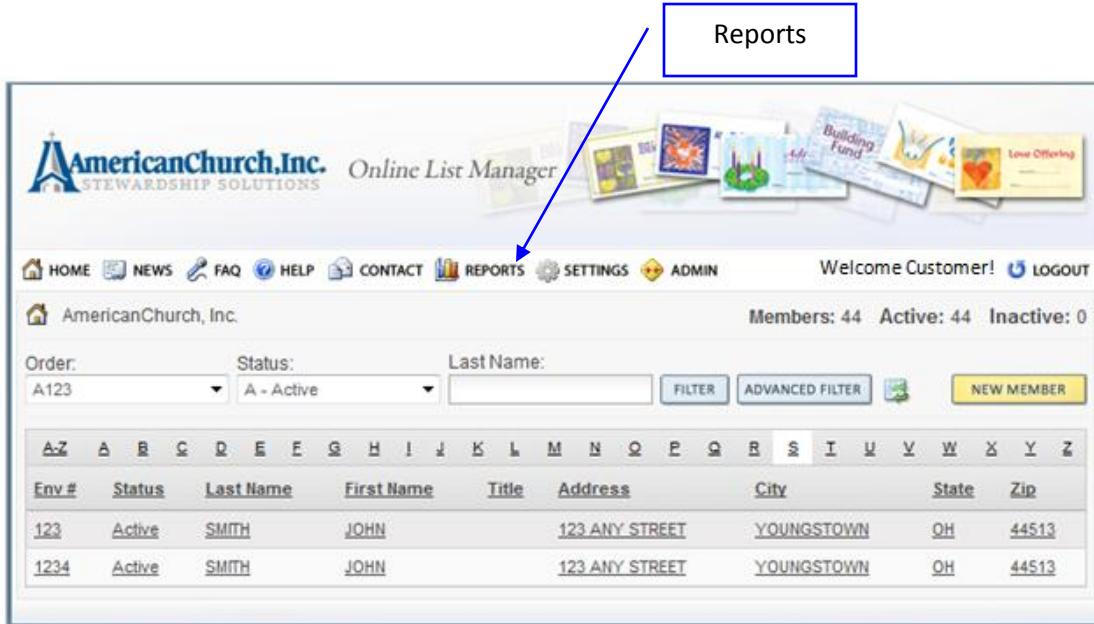
Show me History between and 5/1/2012 [View History](#)

1 record(s) found...

Original Record from 5/1/2012 2:13:02 PM [Return to Top](#)

| | | |
|---|------------------------------------|---|
| Modified By: customer@aci.com | User Name: abice@osv.com | Action: Created |
| Last Name: SMITH | First Name: JOHN | Title: |
| Address 1: 123 ANY STREET | Status: A - Active | Envelope #: 123 |
| Address 2: | ReActivate: | Order # Starter Exempt A123 False False |
| City: YOUNGSTOWN | State: Zip: OH 44513 | |
| Primary Address | Alternate Address | Contact Info |

How to Print Reports from the Online List Manager



How to print labels

Click the 'Reports' button

Select **Report Type:** Label Report

Select the **Report** - Label Type

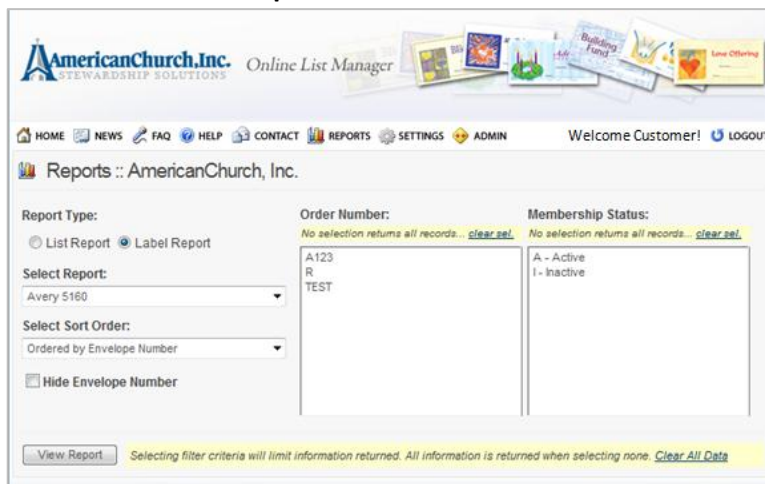
Select the appropriate **Sort Order**

Select the **Order #**

Select the **Status**

Select **Hide Envelope Number** (optional)

Click '**View Report**'



How to print a Member List

Click the 'Reports' button

Select **Report Type**: List Report

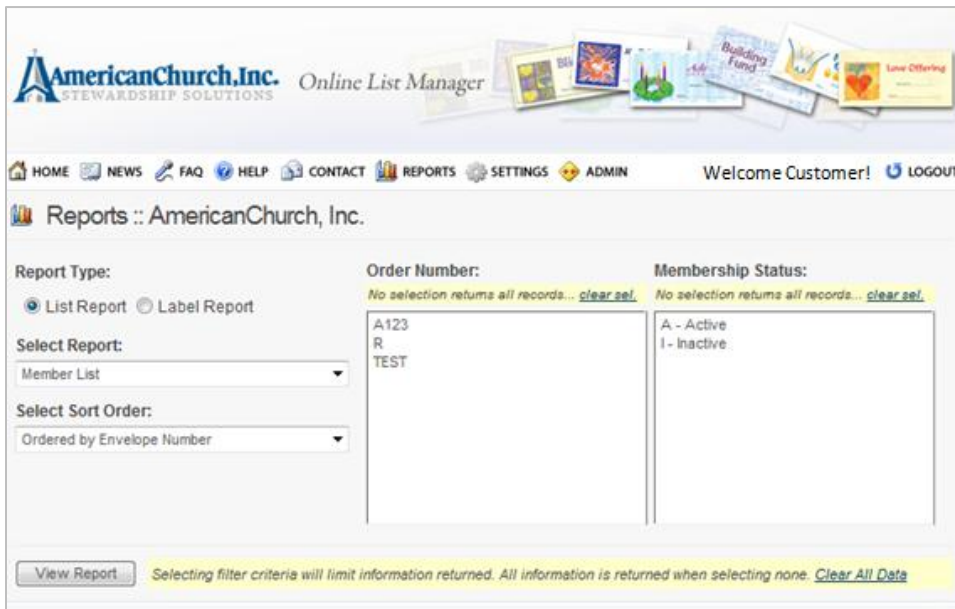
Select the **Report**: Member List

Select the appropriate **Sort Option**

Select the **Order #**

Select the **Status**

Click 'View Report'



How to print an Add/Change report

Click the 'Reports' button

Select **Report Type**: List Report

Select the Report: Add, Change Report

Select the appropriate **Sort Option**

Select the **Order #**

Select the **Status**

Select the **Date Range**

Click 'View Report'

AmericanChurch, Inc. Online List Manager

HOME NEWS FAQ HELP CONTACT REPORTS SETTINGS ADMIN Welcome Customer! LOGOUT

Reports :: AmericanChurch, Inc.

Report Type:
 List Report Label Report

Select Report:
Add, Change Report

Select Sort Order:
Ordered by Envelope Number

Select Date Range:
4/1/2012 4/30/2012
[clear date range](#)

Order Number:
No selection returns all records... [clear sel.](#)
A123
R
TEST

Membership Status:
No selection returns all records... [clear sel.](#)
A - Active
I - Inactive

Selecting filter criteria will limit information returned. All information is returned when selecting none. [Clear All Data](#)

How to print an Address Correction Report

Click the Reports button

Select **Report Type**: List Report

Select the Report: Address Correction Report

Select the appropriate **Sort Option**

Select the **Order #**

Select the **Status**

Select the **Date Range**

Click 'View Report'

AmericanChurch, Inc. Online List Manager

HOME NEWS FAQ HELP CONTACT REPORTS SETTINGS ADMIN Welcome Customer! LOGOUT

Reports :: AmericanChurch, Inc.

Report Type:
 List Report Label Report

Select Report:
Address Correction Report

Select Sort Order:
Order by Change Date

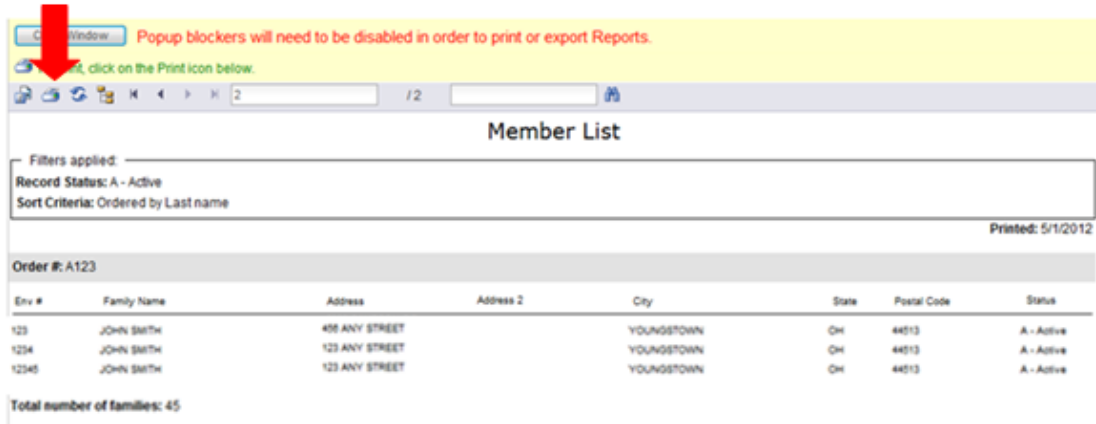
Select Date Range:
4/1/2012 4/30/2012
[clear date range](#)

Order Number:
No selection returns all records... [clear sel.](#)
A123
R
TEST

Membership Status:
No selection returns all records... [clear sel.](#)
A - Active
I - Inactive

Selecting filter criteria will limit information returned. All information is returned when selecting none. [Clear All Data](#)

Please note: Pop up blockers will need to be disabled in order to print or export the Reports.



Popup blockers will need to be disabled in order to print or export Reports.

click on the Print icon below.

Member List

Filters applied:
Record Status: A - Active
Sort Criteria: Ordered by Last name

Printed: 5/1/2012

Order #: A123

| Env # | Family Name | Address | Address 2 | City | State | Postal Code | Status |
|-------|-------------|----------------|-----------|------------|-------|-------------|------------|
| 123 | JOHN SMITH | 456 ANY STREET | | YOUNGSTOWN | OH | 44513 | A - Active |
| 1234 | JOHN SMITH | 123 ANY STREET | | YOUNGSTOWN | OH | 44513 | A - Active |
| 12345 | JOHN SMITH | 123 ANY STREET | | YOUNGSTOWN | OH | 44513 | A - Active |

Total number of families: 45

To **print**, click the printer icon on the report screen, see arrow in picture above. This ensures your printed copy has the same formatting as the original document. Using your browser's 'print' button will not print correctly.

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