

# Blessed Trinity Parish - ParishSOFT Giving FAQ's

[How do I access Online Giving?](#)

[How do I create an Online Giving account?](#)

[How do I navigate within the Online Giving Account Page?](#)

[How do I make a One-time or Recurring gift?](#)

[Where can I donate to second collections?](#)

[How do I add a payment method to my account?](#)

[How do I edit or update a payment method?](#)

[How do I edit my recurring gift to come from an alternate payment method?](#)

[How do I update the expiration date on my Credit Card?](#)

[How do I discontinue a recurring gift?](#)

[Can I get a reminder email in advance of my next recurring gift transaction?](#)

[I am moving, can I set an end date now for my recurring gift\(s\)?](#)

[I don't see the answers I need, who do I contact?](#)

[Why did Blessed Trinity Parish migrate to a new platform?](#)

[When did the transition to ParishSOFT Giving happen?](#)

[What happened to my old account information from before the transition?](#)

[Why don't I see all my Giving information when I sign into the new platform?](#)

[I signed in, but why don't I see data for my recurring gifts, or payment methods?](#)

## How do I access Online Giving?

By selecting the giving link on the Online Giving page (found under the Parish Life tab) or by clicking the **DONATE NOW** button found on our parish website in the upper right, you will automatically be directed to our Giving portal.

## How do I create an Online Giving account?

After navigating to our giving page, please select the "Sign in" tab at the top just below our parish name. Then scroll down, and next to the words, **Don't have a giving account?**, select "**Create One**".

Home Give Now Sign in

Email Address

Next

Or

Login With MinistryID

Don't have a giving account? Create One

Fill in the requested name, address, and other information, then click on "Register". (Don't forget to make note of your password.) Once you complete this you are automatically signed into your account.

Across the top are the tabs **Give Now**, **Recurring** and **History**. The **Give Now** tab is where you can set up recurring gifts or make a one-time donation. The **Recurring** tab will show your current, active recurring giving, and the **History** tab will show your giving transactions to date by year.

The transaction list under the History tab can be sorted ascending or descending by Date, Fund, Payment Method, or Amount by clicking on the corresponding column heading.

*(Continue reading for how to navigate within the Online Giving Account page.)*

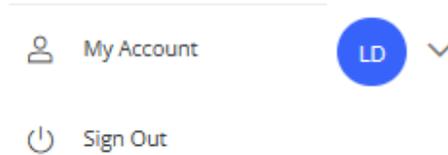
[BACK TO TOP](#)

## How do I navigate within the Online Giving Account Page?

Across the top of the giving page are the tabs **Home**, **Give Now**, **Recurring** and **History**. The **Give Now** tab is where you can set up recurring gifts or make a one-time donation. The **Recurring** tab will show your active recurring giving, and the **History** tab will show your transactions to date by year.

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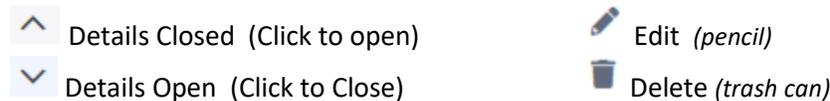
While signed-in you will also see your initials in a blue circle in the upper right corner. Clicking this will open a dropdown menu. Select **My Account**.



**Personal Info** is automatically shown with name and address information. Here is where you can update personal information and select the option to receive a reminder email in advance of your recurring transactions. A list on the left side includes **Payment Methods** where you may add/edit payment methods, and **Account Info** to change your password or email address.

To sign out use the same dropdown accessed through the blue circle (upper right).

### Icons and what they do:



### The HOME tab and Second Collections:

Second causes for the current month are accessible in the Fund dropdown on the main giving page "Give to Blessed Trinity Parish". As a one-time gift this will be processed on the date you submit the transaction.

The **Home** tab gives you access to a "Second Collections" or second cause page. Here you can give to any of our *scheduled* second causes, all of them for the full year, or just the ones you select. The same

A screenshot of the "Second Collections" page. At the top left is the Blessed Trinity Parish logo and the text "Blessed Trinity Parish | Westford - Littleton". Below this is a navigation bar with tabs for "Home", "Give Now", "Scheduled", and "History". The main content area features two cards. The first card, titled "Give to Blessed Trinity Parish", shows two photos of the church and includes the text "Questions? Please contact Lee DeLuca by e...". The second card, titled "Second Collections", shows a person's hands clasped in prayer and includes the text "Choose a dollar amount to be applied to eac...". To the right of the cards, there is a large block of text explaining the process: "dollar amount may automatically be applied to each collection or set a dollar amount to be divided evenly between all collections. You may also specify an amount for each individual cause you wish to support for the current month or the year. \*\*\* Note your selections will recur every year unless you uncheck the 'Recur Annually' box next to each collection. Donations made on the Second Collections page are not processed until the date the collection is scheduled. \*\*\*"

Review your selections at the bottom of the page before you **Submit**. Click on the down arrow next to where you see "Second Collections (One Time)" to see the full list.

When signed into your giving account you may edit or review your submitted Second Collection donations at any time using the Scheduled or History tabs.

[BACK TO TOP](#)

## How do I make a One-time or Recurring gift?

You may donate Online with or without an Online Giving account. The Give Now page defaults to *Recurring Gift*. If you wish to make a One-time gift, select that tab before you start or before confirming your donation.

If you have used Online Giving before, with or without an account, your email will be the identifier that links your donations together in one record (assuming you use the same email each time).

Once you select a fund and an amount you will be asked for payment information. If you have an Online Giving account and choose to sign-in, you may select from an existing payment method or add one at this time.

There is also a checkbox if you wish to add 2% to your donation to help offset the cost of processing. *(This will show up in your family record at the end of year as an "Offertory" donation since Offertory helps cover our day-to-day parish expenses.)* Once you have filled in the required details, select the **Submit** button at the bottom. You will receive an email confirmation of your transaction request.

**Recurring gifts** allow you to set regular payments at a frequency and start date that works best for you. When making a *Recurring Gift* it is best to do so with an Online Giving account, this way you have access to make changes, edit your payment method, see a history of transactions, or discontinue a recurring donation.

[BACK TO TOP](#)

## How do I add a payment method to my account?

Once you are signed into your account click on the blue circle in the upper right with your initials to see a dropdown menu. Select "**My Account**". There will be a list on the left showing: Personal Info, Payment Methods, and Account Info. Select **Payment Methods**. *(continued...)*

Use the **+ Add Payment Method** button, select the payment type, fill out the required information and then **Save**. You may also add a payment method at the time you make a One-time gift or by editing an active Recurring gift.

[BACK TO TOP](#)

If for any reason you wish to add a different account or new card use the **+ Add Payment Method** button.

## How do I edit or update a payment method?

Once you are signed into your account click on the blue circle in the upper right with your initials to see a dropdown menu. Select "**My Account**". There will be a list on the left showing: Personal Info, Payment Methods, and Account Info. Select **Payment Methods**.

Use the chevron  to open the details for the specific credit card, or bank account, then select the small pencil icon to Edit. Make appropriate changes and **Save**.

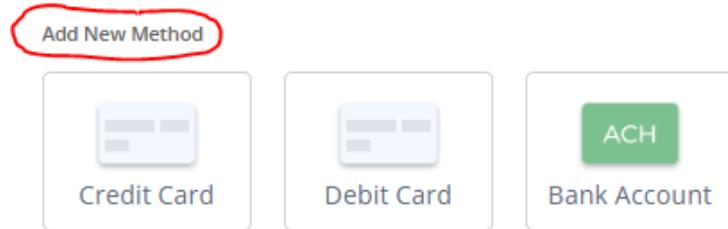
Afterwards make sure to go to the SCHEDULED tab and edit any recurring gift(s) to come from the new payment method if you are no longer using the old one. See below **How do I edit my recurring gift to come from an alternate payment method?**

**NOTE:** You may set a payment method as a "default", however, this option only affects *new or future gifts*, unfortunately it does not change or update any active recurring gift(s) you may have.

[BACK TO TOP](#)

### How do I edit my recurring gift to come from an alternate payment method?

Go to the Scheduled tab to view your active recurring gifts. Select Edit (pencil icon) and scroll down to see the payment options. Choose the preferred payment method and **Save**. If you wish to add a new payment method select the appropriate icon, add the payment detail, billing info and **Save**.



### How do I update the expiration date on my Credit Card?

Once you are signed into your account click on the blue circle in the upper right with your initials to see a dropdown menu. Select **"My Account"**. There will be a list on the left showing: Personal Info, Payment Methods, and Account Info. Select **Payment Methods**.

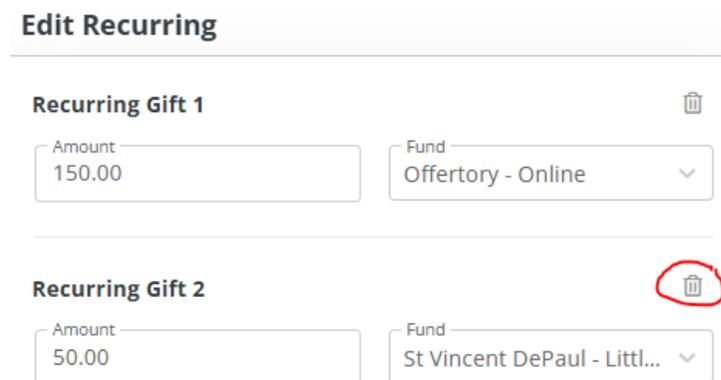
Use the chevron  to open the details for the specific credit card, then select the small pencil icon to Edit. Make the appropriate change and **Save**.

[BACK TO TOP](#)

### How do I discontinue a recurring gift?

Once you are signed into your account select the **Recurring** tab to see your active gifts. Use the chevron  to open the details for the specific recurring gift you wish to discontinue, then select the small trash can icon to **Delete**. If you have multiple funds in your recurring gift (i.e. Offertory and St Vincent de Paul) you may delete just the individual one you wish by instead selecting the **Edit** icon (pencil) scroll to the specific fund and click on the trash can icon to **Delete**.

See diagram for example:



[BACK TO TOP](#)

### Can I get a reminder email in advance of my next recurring gift transaction?

While signed-in you will also see your initials in a blue circle in the upper right corner. Clicking this will open a dropdown menu. Select **My Account**.

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 My Account



 Sign Out

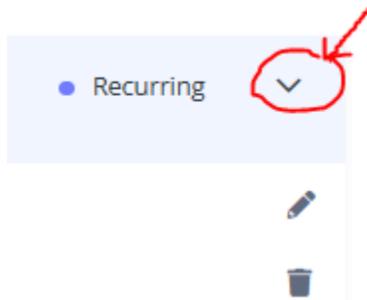
**Personal Info** is automatically shown with name and address information. Below your address is a check box. Select this to receive an email reminder a set number of days in advance - up to 7 days.

Send me an email  days in advance of recurring 

[BACK TO TOP](#)

### I am moving, can I set an end date now for my recurring gift(s)?

When signed into your account your recurring gift details will show under the **Scheduled** tab. There is a small chevron ^ next to the word Recurring. Clicking on this will open further detail and reveal two icons, one for editing (pencil) and one for deleting (trash can).



Click on the pencil icon, so you can edit your gift and scroll down to provide an end date.

Scroll until you see a check box for “End Date”. Check this box and then specify the date you want to discontinue your recurring donations. You are currently giving weekly on Fridays. After you have made these changes select **Save**.

End Date  
 

End Date

[BACK TO TOP](#)

### I don't see the answers I need, who do I contact?

If you have questions or want more information, please [CLICK HERE](#) to email Daine Gavel, or call 978-320-4220, Ext. 114.

### Why did Blessed Trinity Parish migrate to a new platform?

Online Giving has remained the same for many years and was overdue for an update. We moved to the **ParishSOFT Giving** platform to provide the latest technology and allow us to continue to meet parishioners' growing and changing needs.

[BACK TO TOP](#)

### **When did the transition to ParishSOFT Giving happen?**

In late January 2022, our online giving program transitioned to the new giving platform. This provides us with the latest technology and allows us to better meet parishioners' growing and changing needs.

### **What happened to my old account information from before the transition?**

We transitioned all active recurring donor gifts from our prior Online Giving program into ParishSOFT Giving. Your recurring gift is being processed in our new system at the same frequency as before unless you have made changes to it. When logged in you can manage any recurring gifts that are active, make new gifts, edit your payment methods, or change account details.

If signing in for the first time since the transition, please follow the information under **How do I create an account?** Fill in the identifying information using the **same email address** you used when originally signing up for Online Giving. Using the same email address will associate your login with your recurring gifts that were transitioned to the new system. *Please note that if you use a different email address, and then set up a new recurring gift, you will be debited for both recurring gifts.* Please contact [Daine Gavel](#) or call 978-320-4220, Ext. 114 for assistance if you are unsure of the email address you originally signed up with.

[BACK TO TOP](#)

### **Why don't I see all my Giving information when I sign into the new platform?**

Only data associated with recurring givers has transitioned to the new platform. This will include personal info, active recurring gift schedules, payment methods and giving history from 2020 to present.

### **I signed in, but why don't I see data for my recurring gifts, or payment methods?**

In some cases, parishioners with an account may have used Quick Give as a giving method which set them up as both an "independent giver" (with an account login) and as a "quick giver". When signing in for the first time you may have been linked to your "quick give" information which in this case would not contain any personal data. Please do not add any new recurring gifts at this time as this may result in your account being debited twice. Please email [Daine Gavel](#) or call 978-320-4220, Ext. 114.

[BACK TO TOP](#)