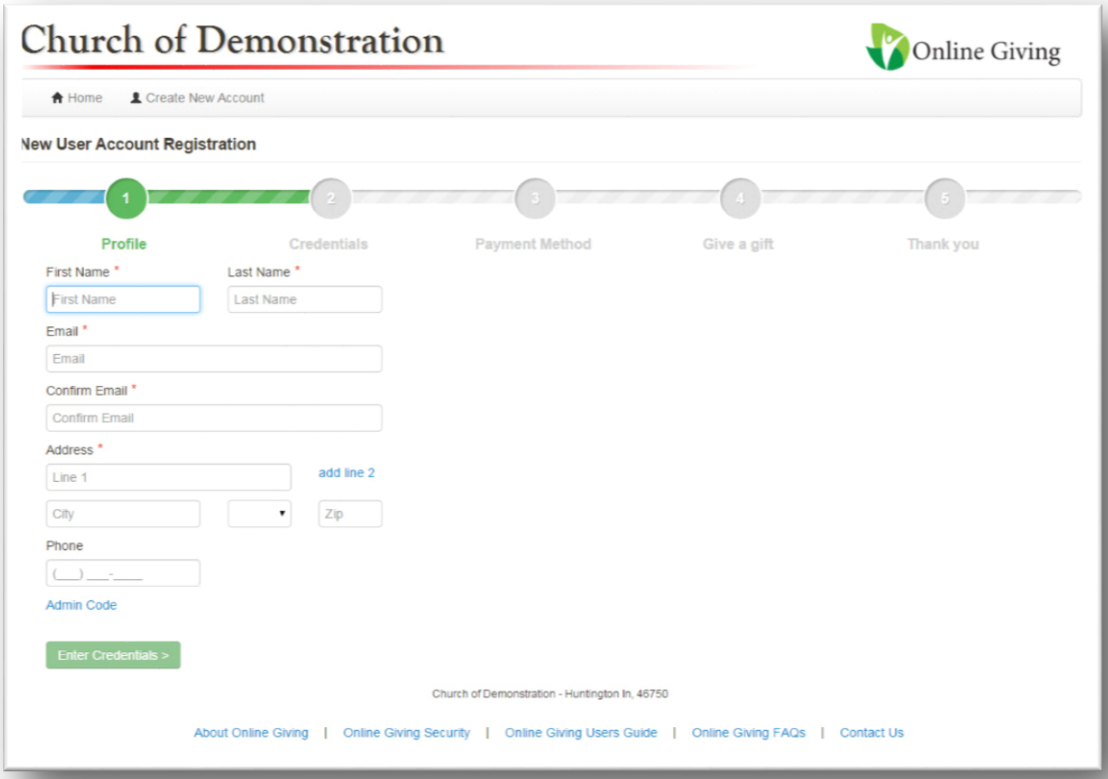
CREATING A DONOR ACCOUNT

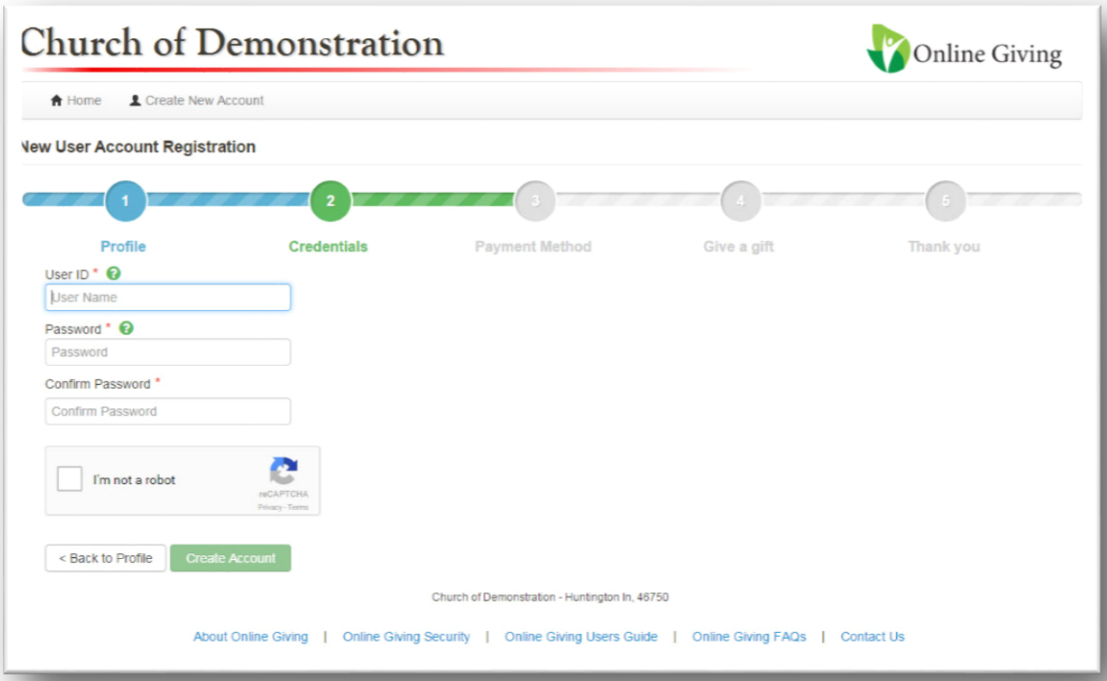
An Online Giving Account should be created to have the ability to set-up recurring donations, pledges and be able to view and print history. Setting up an account will also allow you to set-up payment methods that can be used for future donations. An email address can only be used once per Online Giving URL.

- Navigate to your Online Giving URL
- Click on the ***Create New Account*** link or the ***Sign up for a New Account*** link.
- The ***New User Account Wizard*** will appear



- ***First Name*** – The first name on your account
- ***Last Name*** – This is the last name on the account
- ***Email*** – This is the email address for your account. The email address can only be used one time per URL. This is the email that such things as password reset and user ids will be sent.
- ***Confirm Email*** – Type the email again
- ***Address*** – Most administrators will key in the organizations address when filling in this information. (***Address 2, City/State, and Zip***)
- ***Phone*** – This is not required but you can key in a contact phone number

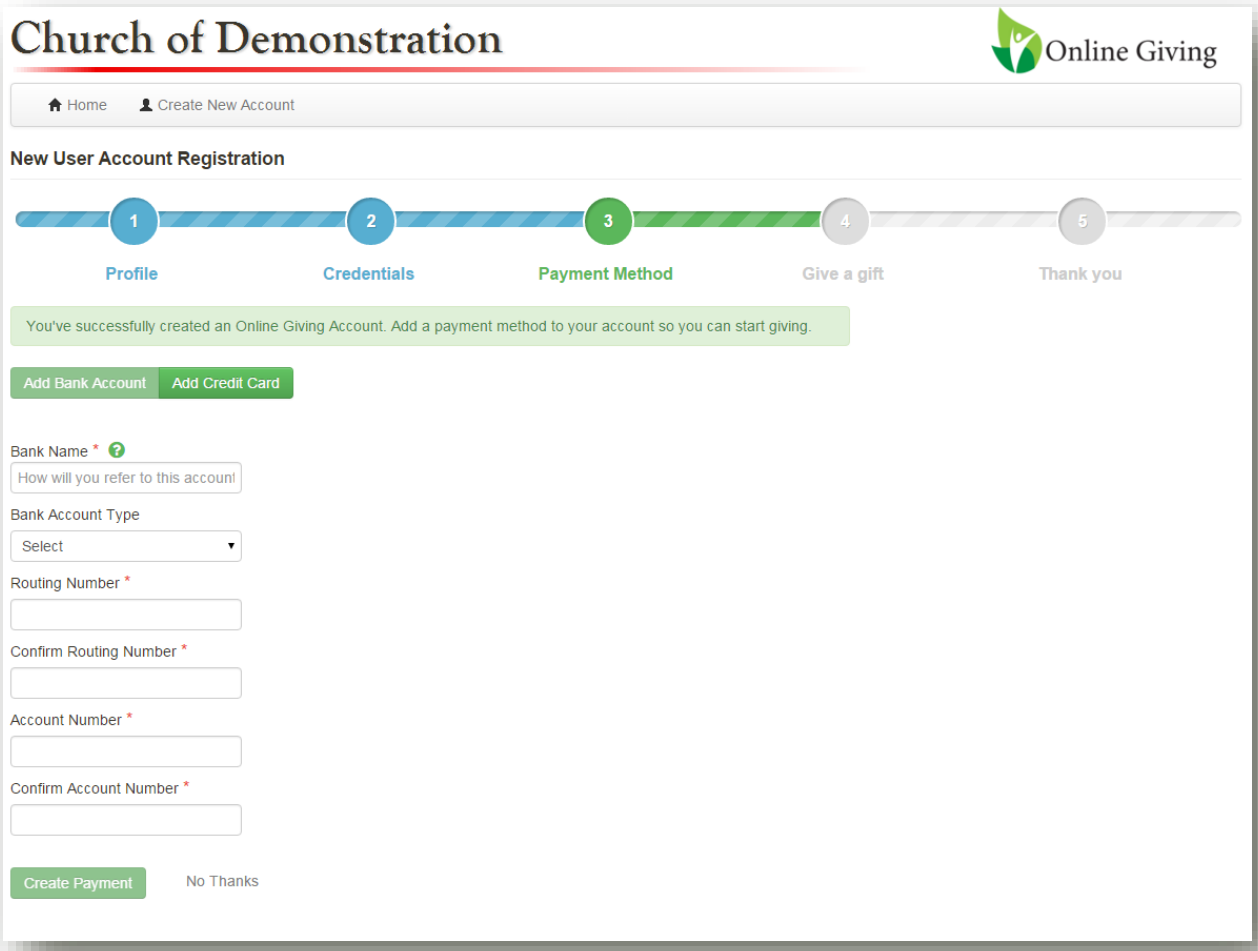
Click Enter Credentials.



- ***Used ID*** – This must be between 6 and 35 characters and may be alpha numeric and contain the special characters of !@&*.
- ***Password*** – This must be between 8 and 16 characters and may be alpha numeric and contain the special characters of !@&*.
- ***Confirm Password*** – Type your password a second time
- ***I'm not a robot (Captcha)*** – This is required and helps the system know that you are a human creating an account and not a computer. This is for security purposes that you will need to solve the puzzle (clicking pictures as instructed).

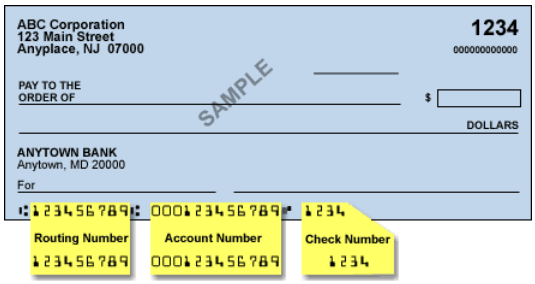
Click the ***Create Account*** button. You will receive email confirmation that your account has been created.

The registration process allows you to enter a payment method at this point. You may also choose ***No Thanks*** and the process will end.

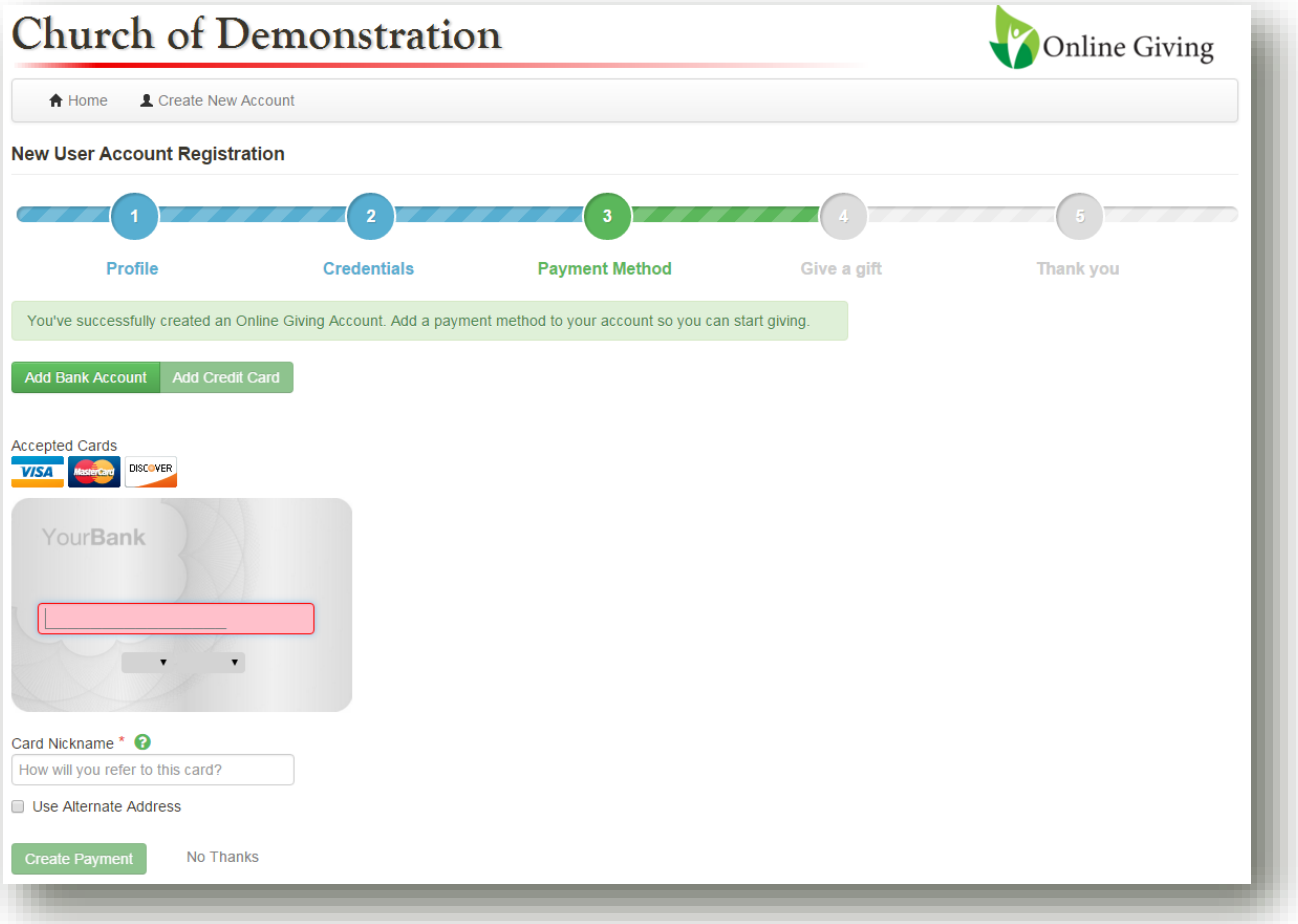


To add a Bank account:

- **Bank Name** – How the account will show in Online Giving
- **Bank Account Type** – Savings or Checking
- **Routing Number** – The routing number located on the bottom of a check
- **Confirm Routing Number** – Confirmation to ensure the routing numbers match
- **Account Number** – The account number located on the bottom of a check
- **Confirm Account Number** – Confirmation to ensure the account numbers match



Click ***Create Payment*** to add the payment method to your account and continue to the next step in the process.



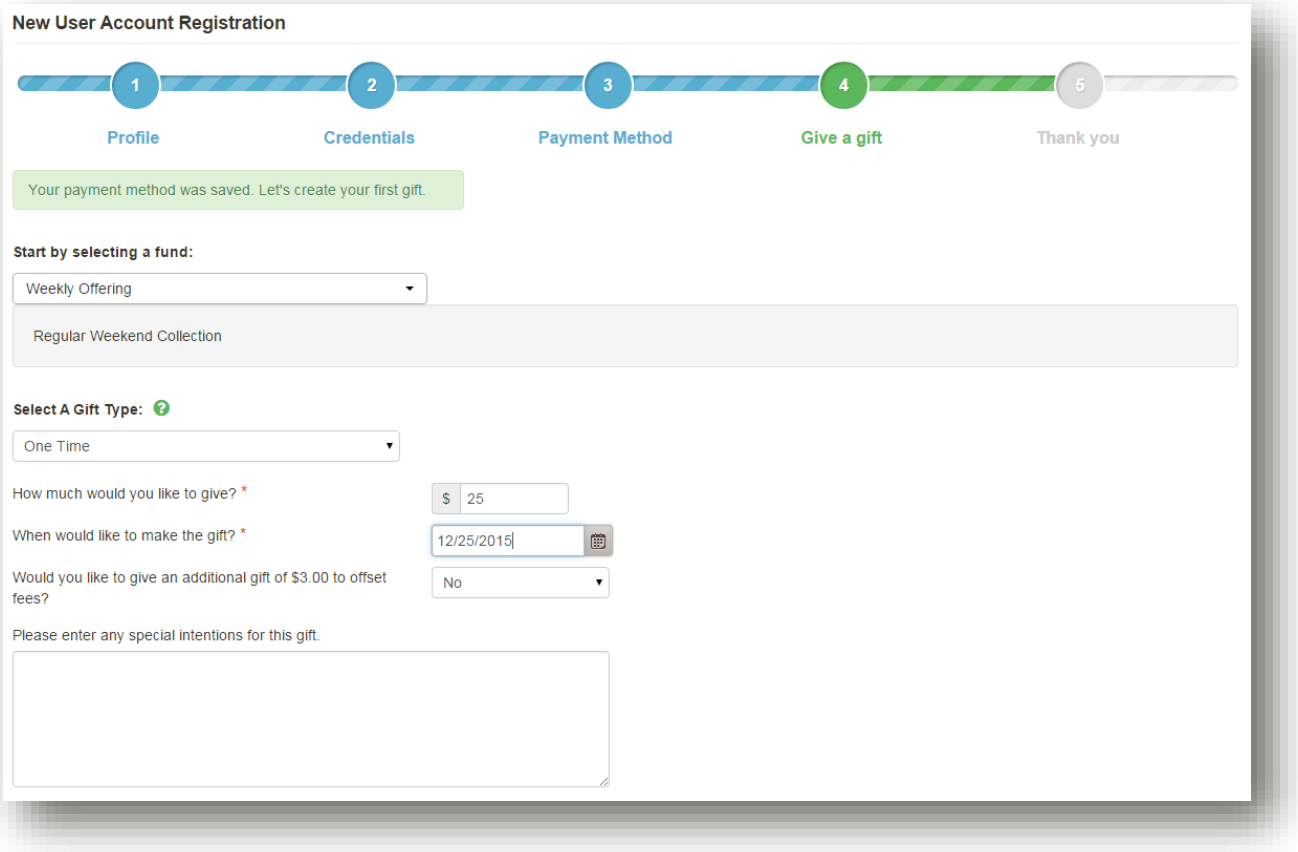
To add a Credit Card:

- **Card Number** – The card number listed on your credit card. ***Note:*** Your organizations accepted cards are displayed and will be the only options accepted.
- **Expiration Month** – Drop down to select the month of your card expiration
- **Expiration Year** – Drop down to select the month of your card expiration
- **Card Nickname** – The name your credit card will appear in the Online Giving System
- **Use Alternate Address** – Will expand fields to enable your billing address to be different than the address listed on your account.

Click ***Create Payment*** to add the payment method to your account and continue to the next step in the process.

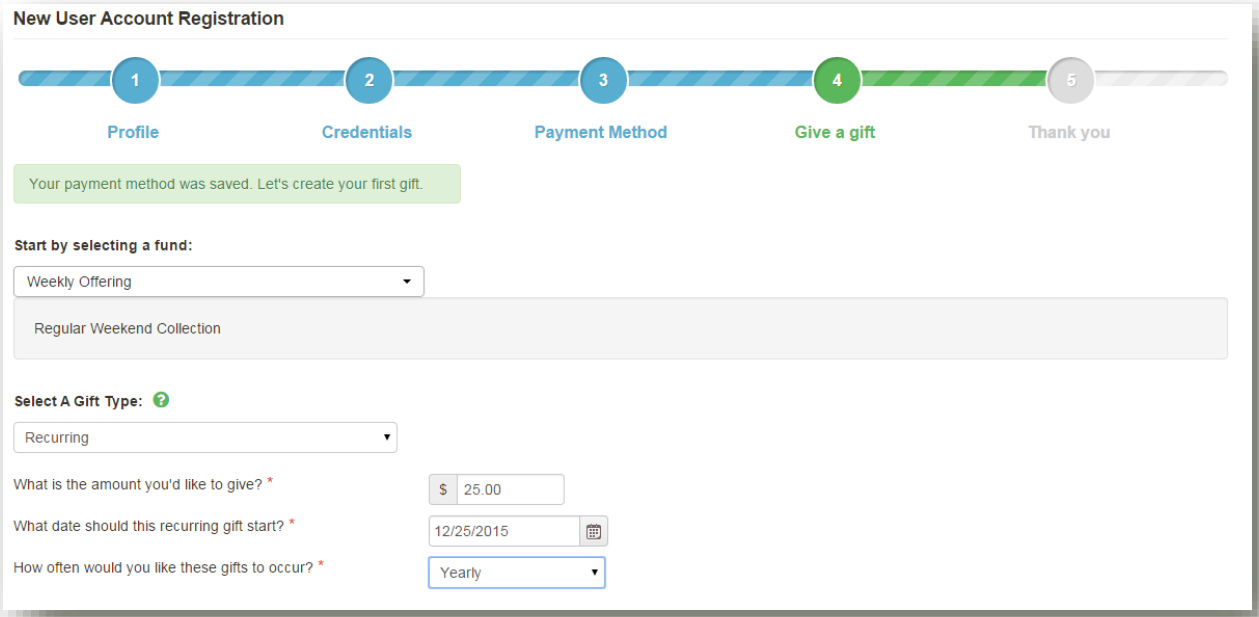
The registration process allows you to enter gifts at this point. You may also choose ***No Thanks*** and the process will end. When adding the gift the wizard will continue to populate the screen with instructions for the required data.

To begin choose a fund. The Gift types will be limited to those that are allowed for that specific fund.



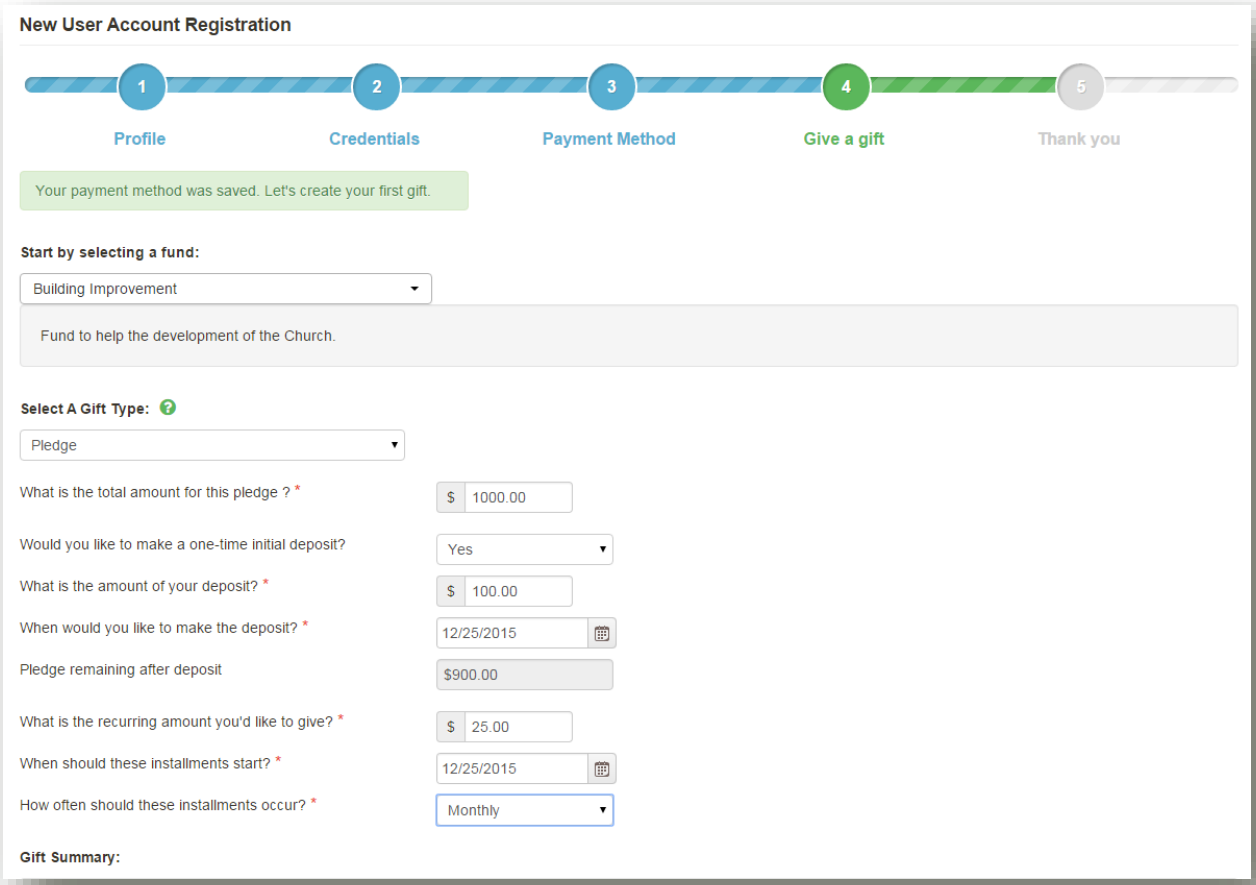
One Time Gifts:

- **Amount** – The total amount of this gift
- **Date** – The date this gift is to be given
- **Defray** – (Only if the payment method is a credit card) Yes or No
- **Special Intentions** – If any special intentions are intended with the gift



Recurring Gifts:

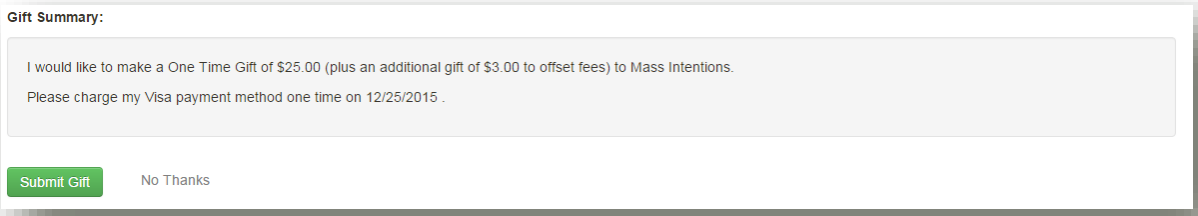
- **Amount** – The amount to be given on each recurrence
- **Date** – The date to start the recurring payments
- **Recurrence** – How often you would like the gifts to recur. These options are limited based on your organizations preferences

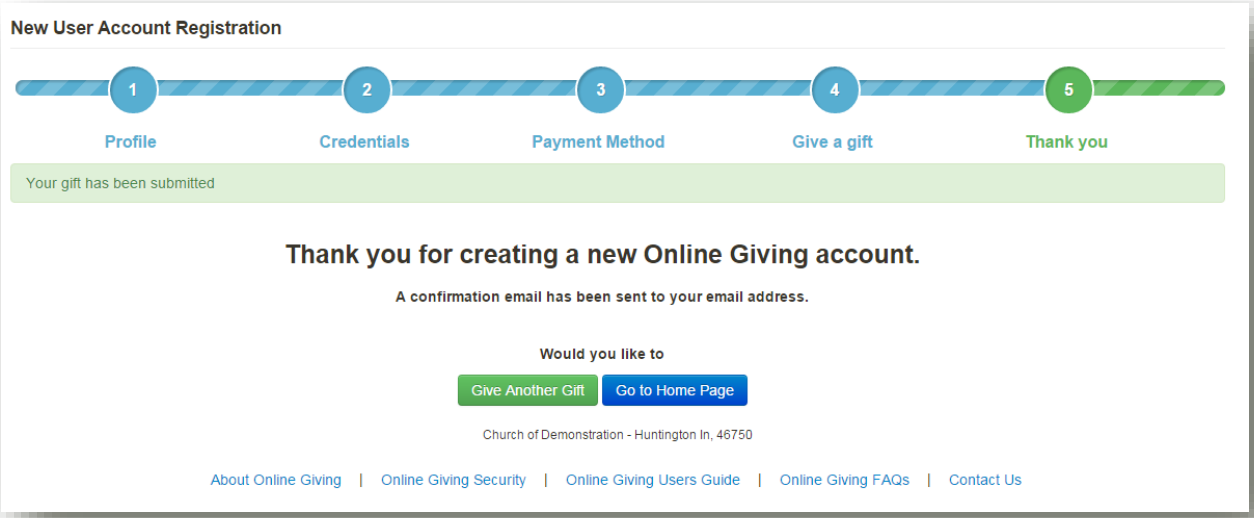


Pledge:

- **Pledge Total** – The total amount of the pledge
- **Initial Deposit** – If you would like to include and initial deposit, Yes or No
    - **Deposit Amount** – The amount of your deposit
    - **Deposit Date** – The date of your deposit
- **Recurring installment amount** – The amount of your recurring payment towards the pledge
- **Installment start date** – Date the installments start
- **Installment recurrence** - How often you would like the installments to occur. These options are limited based on your organizations preferences

Each gift has a summary at the bottom detailing the above information to allow you to double check before submitting the gift.





The registration process is finished after submitting the gift. You have the option to give another gift which repeats the above process for gifts, or go to the Online giving home page. You will receive a confirmation email regarding any gifts that are set up.

LOGING INTO ONLINE GIVING

Once you have created your Online Giving Account, you are now able to log into Online Giving.

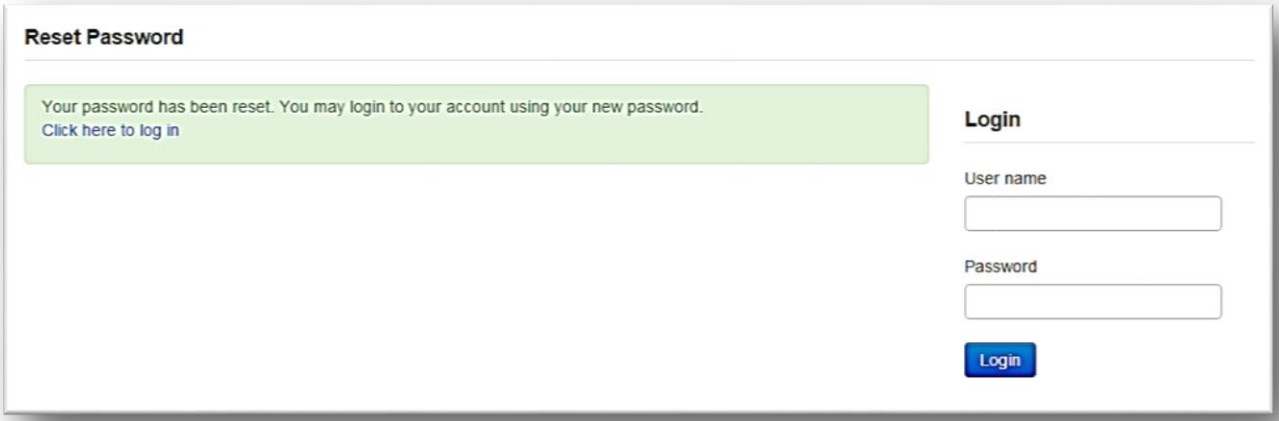
- Navigate to your Online Giving URL
- Under ***Login***
    - ***User name*** – key in the user name that you created
    - ***Password*** – key in the password that you created
- Click the ***Login*** button

FORGOT USER ID OR PASSWORD

Forgot User ID and Password text appears below the existing user login.

- User ID
    - Click on the words ***User ID***
    - A screen will pop open for you to enter your email address that you used to create your account. You will enter the email address a second time.
    - Click the blue ***Submit*** button
    - You will see a notification that the User ID will be sent to you.
    - Check your email address for the User ID. User ID is case sensitive.
- Password
    - Click on the word ***Password***
    - A screen will pop open for you to enter your email address that you used to create your account. You will enter the email address a second time.
    - Click the blue ***Submit*** button
    - You will see a notification that the Password Reset Link will be sent to you.
    - Check your email for the Password Reset Link and click the link in the email. If you cannot click the link, copy and paste the link into your browser.
    - ***New Password*** - Enter the password that you would like to use under **New *Password*** - This must be between 8 and 16 characters and may be alpha numeric and contain the special characters of !@&*. The password is case sensitive.
    - ***Confirm Password –*** Enter your password a second time.

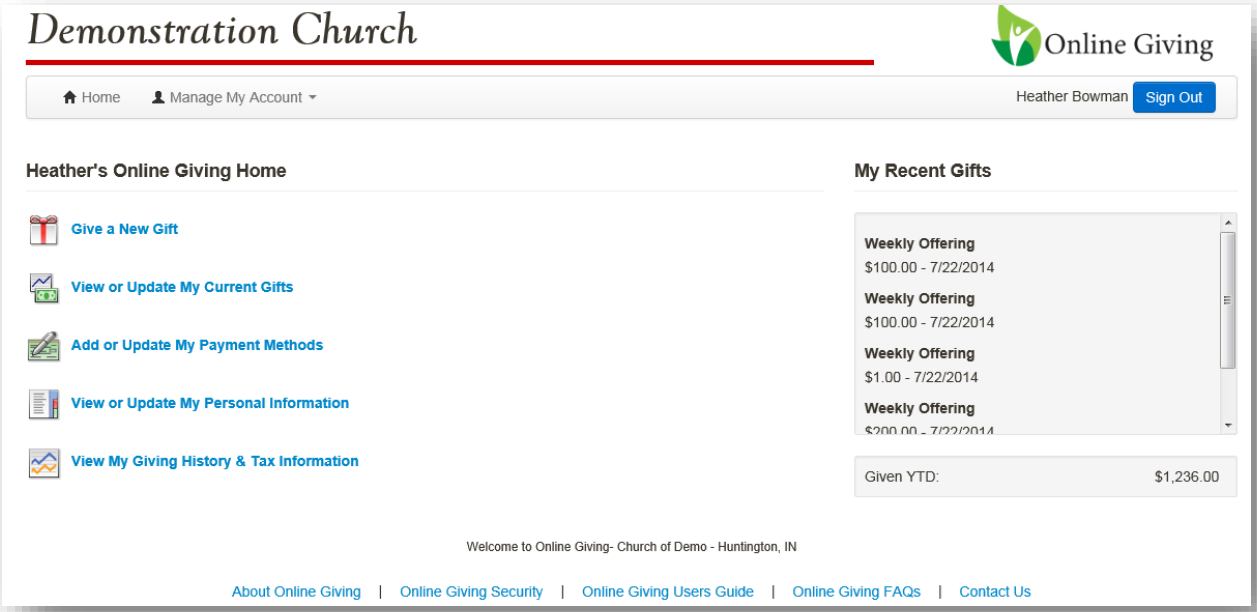
- You will receive the message that your password has been reset and you can now log in



- Enter your ***User name*** and ***Password*** under ***Login***
- Click the blue ***Login*** button

DONOR HOME PAGE

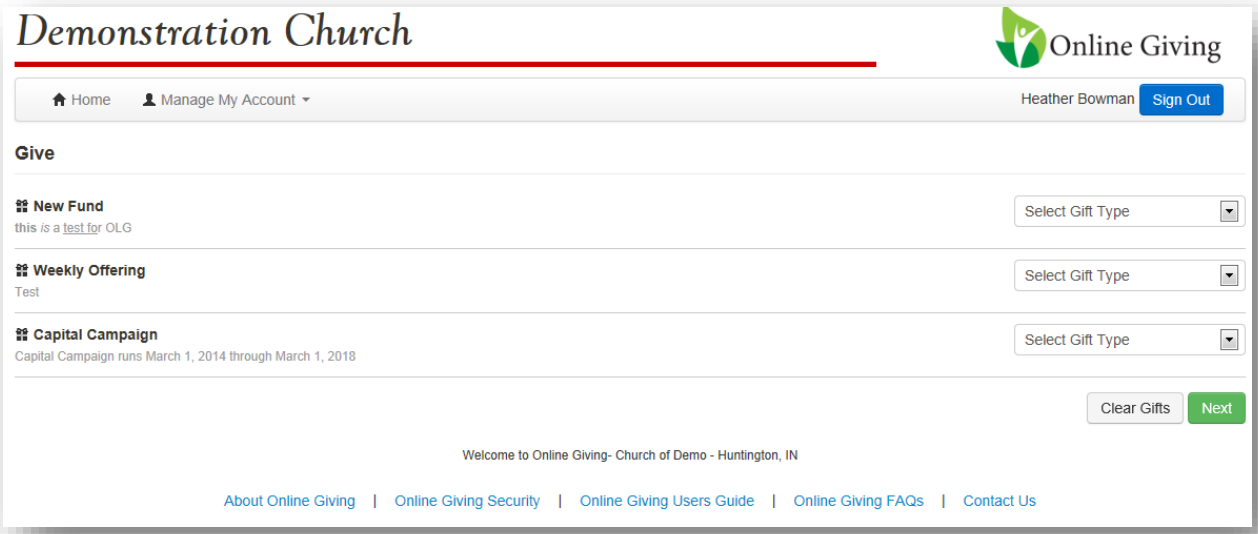
This is the landing page for people that log in as a donor for Online Giving.



- ***Give a New Gift –*** This is the area that you will set-up a new donation. This is not the area that you will change an existing gift. Setting up a new gift does not override an existing donation.
- ***View or Update My Current Gifts –*** This is the area that you will view the gifts that you currently have scheduled to come out in the future. You will also be able to change your donations that you have set-up in Online Giving.
- ***Add or Update My Payment Methods –*** This is the area that you will add a payment method or update or change an existing method.
- ***View or Update My Personal Information –*** This is the area that you will update or change your personal information.
- ***View My Giving History & Tax Information –*** This is the area that you will view past donations or print reports such as a printout for tax purposes.
- ***My Recent Gifts –*** This area shows you the most recent donations.
- ***Menu Bar***
    - ***Home –*** This link will take you back to this home page from any page.
    - ***Manage My Account –*** This link will give you a dropdown list that will take you to additional pages
    - ***Sign Out Button –*** This button will log you out of your Online Giving Account.

GIVE A NEW GIFT

This is the page that you will set-up a new donation. If you want to edit your donation, you will need to change them under the ***My Current Gifts*** page. You will have to have a payment method on file to make a donation. If you need to enter a payment method, please navigate to the ***My Payment Methods*** page.

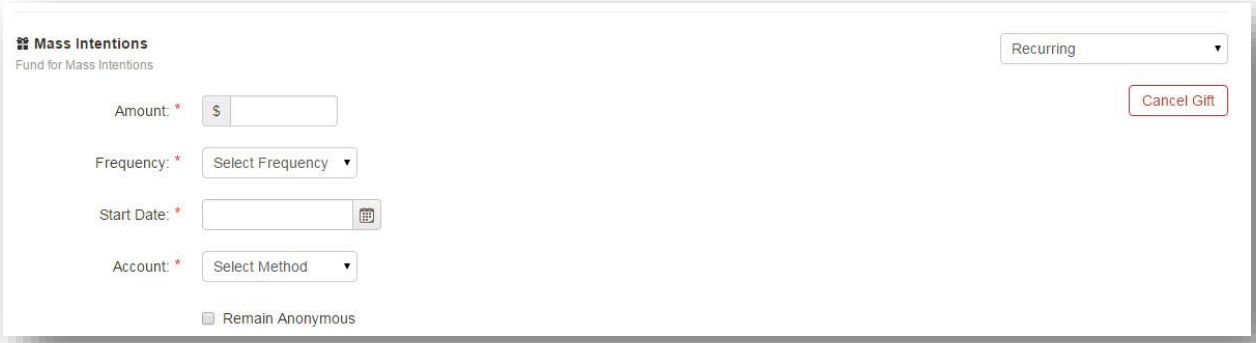


- Locate the fund that you would like to donate to. The names of the funds are bold and have the gift icon next to them.
- The description and instructions for the fund will be in the text below the fund name.
- Click the arrow next to the ***Select Gift Type*** box to choose how you will be donating to that collection. Your organization will select the options during set-up. Those options could include any of the following:
    - Recurring
    - One Time
    - Pledge
- Once you have selected the gift type, follow the instructions below for the type you have selected.

RECURRING DONATIONS

This gift type is used to make donations to a fund that you want to happen over and over again. This is used for church support, offertory, and even Christmas Offerings. This type of donation will not end until you stop the donation or your organization ends the collection.

Please remember that you need to go to the ***My Current Gifts* page to change an existing donation. Setting up a new donation WILL NOT replace the existing one.



- ***Amount*** – Enter the amount that you would like to donate.
- ***Frequency*** – Select the frequency of the donation that you are setting up. Options are determined by the organization that you are donating to. Options that could be included:
    - Weekly
    - Bi-Weekly
    - Monthly
    - Quarterly
    - Twice a Year - every 6 months
    - Yearly

    *If you would like to donate twice a month, you will need to set-up two separate monthly donations. (Example would be the 1st and 15th of the month.)

- ***Start Date*** – Enter the date that you would like the donation to start.
- ***Account*** – Select the bank account or credit cards that you would like to use.
- ***Remain Anonymous*** – This should be checked to keep your gift anonymous to others.
- ***Cancel Gift*** – Click this button to remove the information that you have keyed in for this fund.

Once you have entered all the information in for all the funds that you would like to donate to, click the green next button. Please see ***Submitting Donations*** on instructions on how to submit your donations.

ONE TIME DONATIONS

This gift type will have the donation come out only one time. One time options are used for those collections that happen at different times each year or if you would like to make different donation amounts each week/month. This option can also be used to make-up missed donations.

- ***Amount*** – Enter the amount that you would like to donate.
- ***Date*** – Enter the date that you would like the donation to process.
- ***Account*** – Select the bank account or credit cards that you would like to use.
    - ***Defray*** - You will see the option to add $3.00 to offset costs if paying by credit card. This is an optional item and will only be seen by donors using the one time option using your credit card.
- ***Special Intentions*** – Use this box to give your organization information that they have requested for this fund.
- ***Remain Anonymous*** – This should be checked to keep your gift anonymous to others.
- ***Cancel Gift*** – Click this button to remove the information that you have keyed in for this fund.

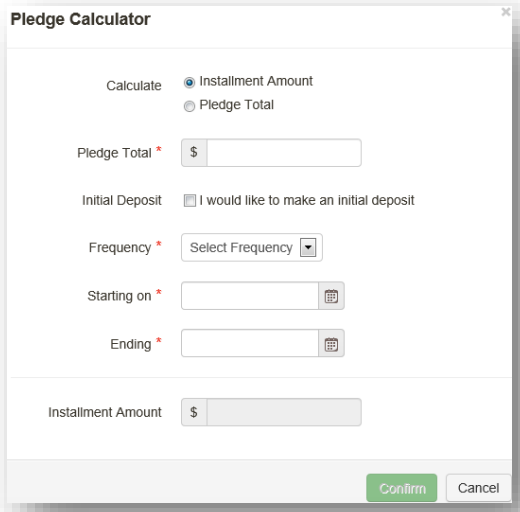
Once you have entered all the information in for all the funds that you would like to donate to, click the green next button. Please see ***Submitting Donations*** on instructions on how to submit your donations.

PLEDGE DONATIONS

This payment type is used to make a pledge of a donation and then make payments on that donation until it is fulfilled. This payment type is used for capital campaigns, building funds, stewardship offerings and tuition to name a few.

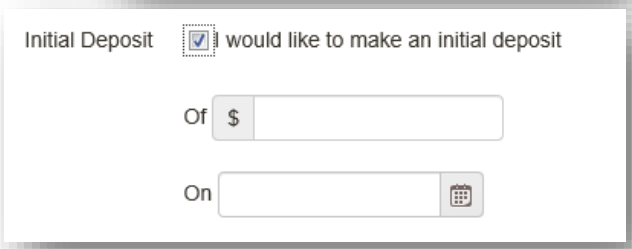
PLEDGE CALCULATOR

This is a feature that can be used to help determine your pledge amount or your payments. This does not have to be used if you know the payment amount and total pledge that you would like to donate.



Use Pledge Calculator – You can click this button to use the pledge calculator to assist you with determining your pledge amount or your payments.

- **Installment Amount** – use this option to determine the payment amount
  - ***Calculate –*** Make sure the Installment Amount is selected for this option.
  - ***Pledge Total –*** Type in the total amount you would like to donate.
  - ***Initial Deposit –*** Check this box if you would like to make an initial deposit. This is not required and you can make payments without this.
    - If you choose to make an initial deposit, you will get two additional fields to pop up.
      - ***Of –*** Key in the amount of the initial deposit
      - ***On*** – Key in the date that you would like to make this initial deposit.



  - ***Frequency*** – Select the frequency of the donation that you are setting up. Options are determined by the organization that you are donating to. Options that could be included:
    - Weekly
    - Bi-Weekly
    - Monthly
    - Quarterly
    - Twice a Year - every 6 months
    - Yearly

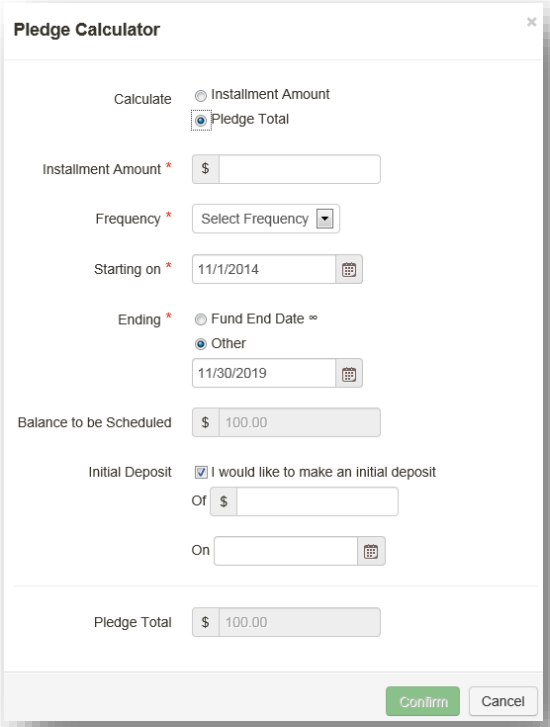
    *If you would like to donate twice a month, you will need to set-up two separate monthly donations. (Example would be the 1st and 15th of the month.)

- ***Starting On*** – Enter the date that you would like the donation to start processing.
- ***Ending***– Enter the date that you would like the donation to end on.
- ***Installment Amount*** – They system has calculate this as the amount that you would need to pay to fulfill your donation.
- Click the green ***Confirm*** button to accept the instalment amount
- Click the Cancel button to exist the calculator

*You may adjust the dates and amounts to come up with the instalment amount that will work for your donation.

- **Pledge Total** – use this option to determine the pledge total when you know the payment method that you would like to use.
  - ***Calculate –*** Make sure the Pledge Total Amount is selected for this option.
  - ***Installment Amount –*** Type in the payment amount you would like to donate.
  - ***Frequency*** – Select the frequency of the donation that you are setting up. Options are determined by the organization that you are donating to. Options that could be included:
    - Weekly
    - Bi-Weekly
    - Monthly
    - Quarterly
    - Twice a Year - every 6 months
    - Yearly

    *If you would like to donate twice a month, you will need to set-up two separate monthly donations. (Example would be the 1st and 15th of the month.)

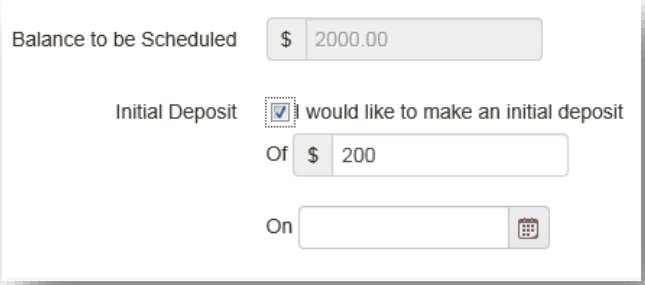


  - ***Starting On*** – Enter the date that you would like the donation to start processing.
  - ***Ending*** – Enter the date that you would like the donation to end on.
    - ***Fund End Date*** – You can select the date the organization has selected as the end date for the fund
    - ***Other*** – You will select the date that you would like the donation to stop

  - ***Initial Deposit –*** Check this box if you would like to make an initial deposit. This is not required and you can make payments without this.

- ***Balance to be Scheduled*** – This box will only appear if you select the option of initial deposit. This amount will be the total amount of your instalments before the initial deposit.

- If you choose to make an initial deposit, you will get two additional fields to pop up.
    - ***Of*** **–** Key in the amount of the initial deposit
    - ***On*** – Key in the date that you would like to make this initial deposit



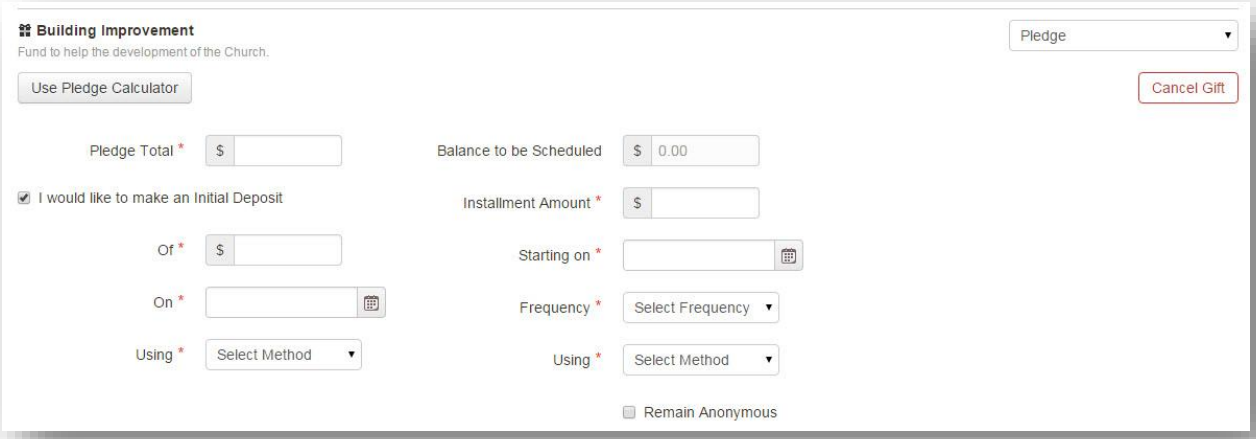
- ***Pledge Total*** **–** This amount is the calculated total pledge amount
- Click the green ***Confirm*** button to accept the instalment amount
- Click the Cancel button to exist the calculator

*You may adjust the dates and amounts to come up with the instalment amount that will work for your donation.

- In you click confirm, it will populate your pledge and instalment amounts.

COMPLETEING PLEDGE

If you used the pledge calculator, some of the fields will be populated. If you did not use the pledge calculator, you will need to populate all the fields manually.



- ***Pledge Total*** – This is the total amount of your pledge
- ***I would like to make an Initial Deposit*** – This is checked only if you want to make an initial deposit. You will see the following fields only if you check this box:
    - ***Of*** – Key in the amount of the initial deposit
    - ***On*** – Key in the date that you would like to make this initial deposit
    - ***Using*** – Select your payment method that you would like to use for the initial deposit

- ***Balance to be Scheduled*** – This box will only appear if you select the option of initial deposit. This amount will be the total amount of your instalments before the initial deposit.
- ***Installment Amount*** – Type in the payment amount you would like to donate.
- ***Starting On*** – Enter the date that you would like the donation to start processing.
- ***Frequency*** – Select the frequency of the donation that you are setting up. Options are determined by the organization that you are donating to. Options that could be included:
    - Weekly
    - Bi-Weekly
    - Monthly
    - Quarterly
    - Twice a Year - every 6 months
    - Yearly

    *If you would like to donate twice a month, you will need to set-up two separate monthly donations. (Example would be the 1st and 15th of the month.)

- ***Using*** – Select your payment method that you would like to use for installments
- ***Select Organization*** – This box will only appear if your organization has this feature turned on. You will have text in front of the box explaining what they would like you to select.
- ***Remain Anonymous*** – This should be checked to keep your gift anonymous to others.
- ***Cancel Gift*** – Click this button to remove the information that you have keyed in for this fund.

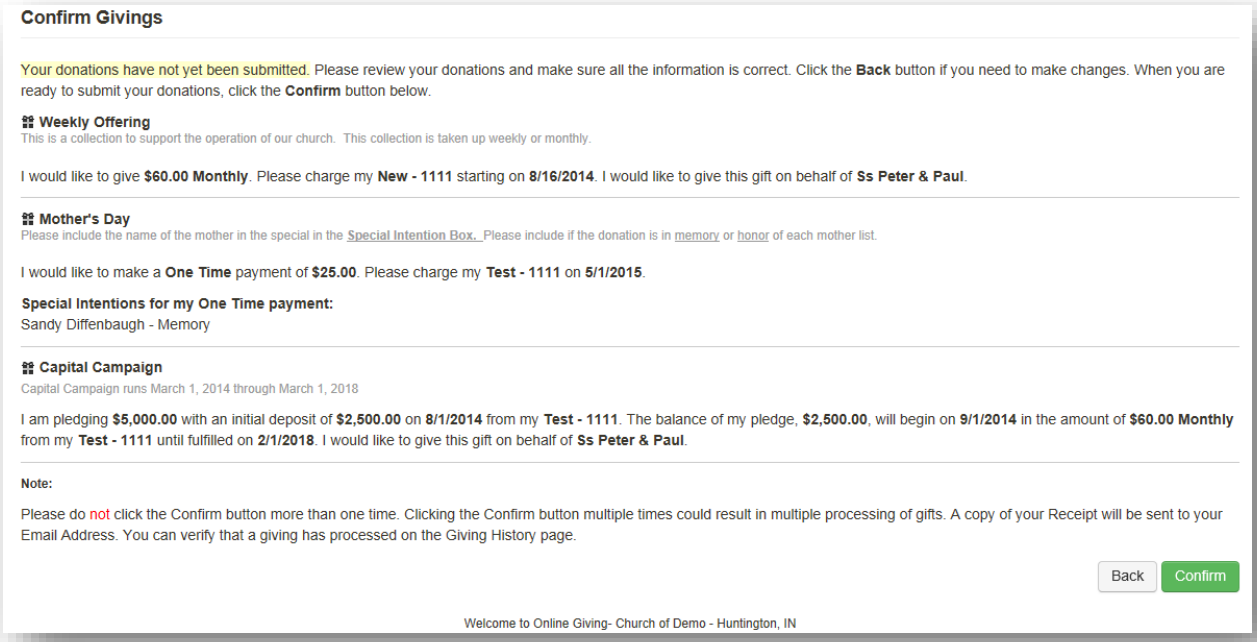
Once you have entered all the information in for all the funds that you would like to donate to, click the green next button. Please see ***Submitting Donations*** on instructions on how to submit your donations.

SUBMITTING DONATIONS

Once you have completed all the required information on the Give Page for each fund that you would like to donate to, follow the directions below.

- Click the green ***Next*** button

- If you would like to start over, click the ***Clear Gifts*** button



Confirm Givings

Your donations have not yet been submitted. Please review your donations and make sure all the information is correct. Click the **Back** button if you need to make changes. When you are ready to submit your donations, click the **Confirm** button below.

Weekly Offering
This is a collection to support the operation of our church. This collection is taken up weekly or monthly.

I would like to give **$60.00 Monthly**. Please charge my **New - 1111** starting on **8/16/2014**. I would like to give this gift on behalf of **Ss Peter & Paul**.

Mother's Day
Please include the name of the mother in the special in the Special Intention Box. Please include if the donation is in memory or honor of each mother list.

I would like to make a **One Time** payment of **$25.00**. Please charge my **Test - 1111** on **5/1/2015**.

Special Intentions for my One Time payment:
Sandy Diffenbaugh - Memory

Capital Campaign
Capital Campaign runs March 1, 2014 through March 1, 2018

I am pledging **$5,000.00** with an initial deposit of **$2,500.00** on **8/1/2014** from my **Test - 1111**. The balance of my pledge, **$2,500.00**, will begin on **9/1/2014** in the amount of **$60.00 Monthly** from my **Test - 1111** until fulfilled on **2/1/2018**. I would like to give this gift on behalf of **Ss Peter & Paul**.

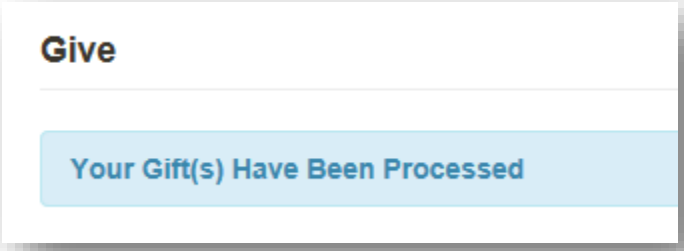
Note:

Please do not click the Confirm button more than one time. Clicking the Confirm button multiple times could result in multiple processing of gifts. A copy of your Receipt will be sent to your Email Address. You can verify that a giving has processed on the Giving History page.

Back Confirm

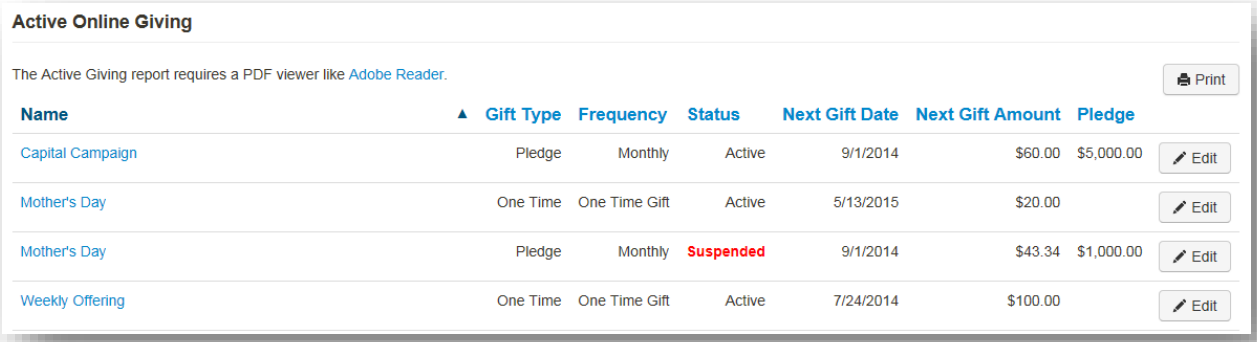
Welcome to Online Giving- Church of Demo - Huntington, IN

- **Confirm Giving** – This is the summary of your donations that you are about to submit. Your gifts have not been submitted until you click the confirm button.
  - Make sure that all of the donations that you have set-up are correct.
  - If you need to make changes, click the back button
  - Once everything is correct, click the green ***Submit*** button
  - You will get a page that has the message that Your Gift(s) Have Been Processed
  - You can print this page or click finish – you will also receive an email confirmation.



VIEW OR UPDATE MY CURRENT GIFTS

This is the area that you change your donations that you have set-up in the future. You can sort the columns by clicking on the column titles in blue.



Active Online Giving

The Active Giving report requires a PDF viewer like Adobe Reader. Print

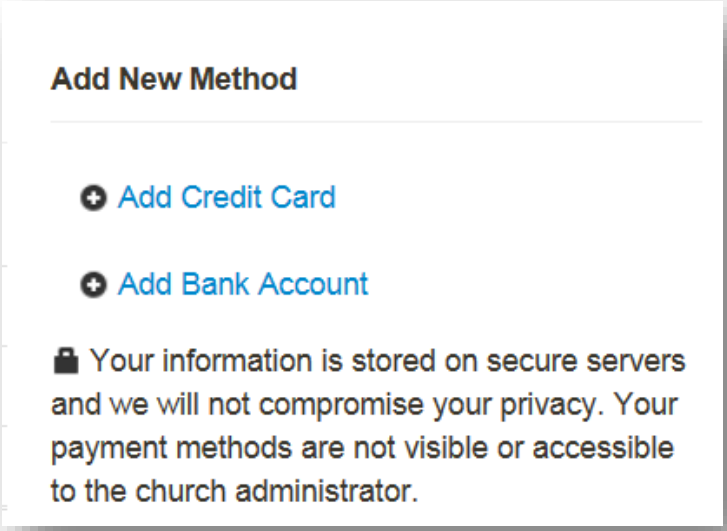
Name	Gift Type	Frequency	Status	Next Gift Date	Next Gift Amount	Pledge	
Capital Campaign	Pledge	Monthly	Active	9/1/2014	$60.00	$5,000.00	Edit
Mother's Day	One Time	One Time Gift	Active	5/13/2015	$20.00		Edit
Mother's Day	Pledge	Monthly	Suspended	9/1/2014	$43.34	$1,000.00	Edit
Weekly Offering	One Time	One Time Gift	Active	7/24/2014	$100.00		Edit

- ***Name*** – This is the name of the fund that you are donating to
- ***Gift Type*** – This is the type of gift you are giving
  - ***One Time***
  - ***Pledge***
  - ***Recurring***
- ***Frequency –*** This is the frequency of the donation
  - ***One Time***
  - ***Weekly***
  - ***Bi-Weekly***
  - ***Monthly***
  - ***Quarterly***
  - ***Twice a Year - every 6 months***
  - ***Yearly***
- ***Status –*** This is the status of this donation
  - ***Active –*** donations will process as scheduled
  - ***Suspended –*** donations in this status have stopped due to you stopping them or a failed payment method.
- ***Next Gift Date –*** This is the next gift date for this fund. It could be in the past if the fund had been suspended.
- ***Next Gift Amount*** – This is the amount that is scheduled to come out with the next donation.
- ***Pledge*** – This is the total pledge amount and will only contain information if the ***Gift Type*** is pledge.
- ***Edit*** – Click this button to edit your gift. You can also click on the fund name.

ADD OR UPDATE MY PAYMENT METHODS

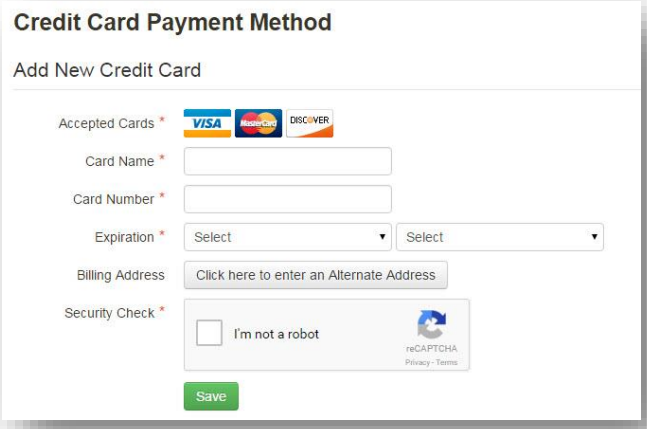
This is the page that you will add a new payment method or edit an existing one. You will want to edit an existing method if you have active donations already set-up in the system. The active donations will automatically be tied to the updated payment method.

ADD NEW PAYMENT METHOD



CREDIT CARD

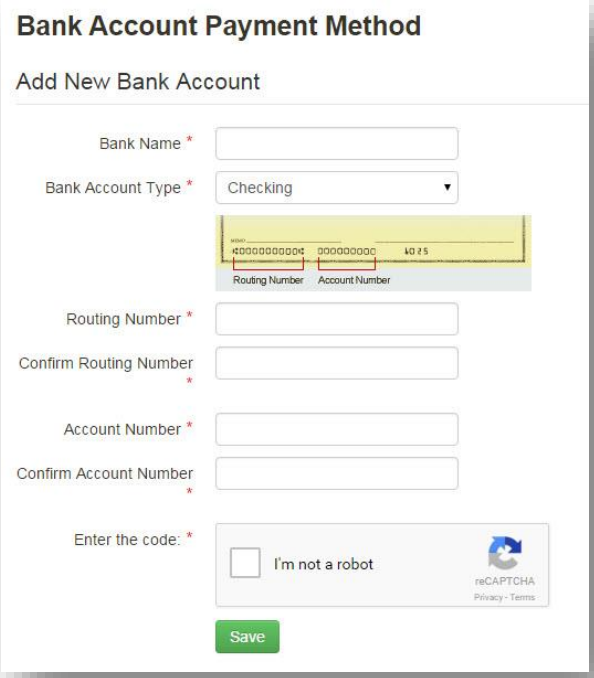
- Click ***Add Credit Card***
- This page will open
  - **Accepted Cards** – The cards that are accepted will be pictured here. If the card is not pictured, your organization does not accept it.
    - Visa
    - MasterCard
    - Discover
    - American Express
  - ***Card Name –*** This is the name that appears with the last four digits of your account number in reports and when setting up your donations.
    - Many people will use the name of the card – Visa, Discover or Chase, Capital One and so on.
  - ***Card Number*** – This is the location that you will enter your complete card number.



        - If you are editing your payment method for any reason, you will need to reenter the entire credit card number.
    - ***Expiration Date*** – This is the month and year your card expires. You will need to select the Month and year from the drop down list.
    - ***Billing Address*** – You only need to enter this information if the address that you used on your account is not the same address as you have registered with your credit card.
        - Click the gray box – enter the following information that is registered with your credit card company.
            - ***Phone Number***
            - ***Address 1***
            - ***Address 2***
            - ***City***
            - ***State***
            - ***Postal Code***
    - ***Security Check*** – This is required and helps the system know that you are a human creating an account and not a computer. This is for security purposes that you will need to solve the puzzle (clicking pictures as instructed).
    - Click the green ***Save*** button

BANK ACCOUNT

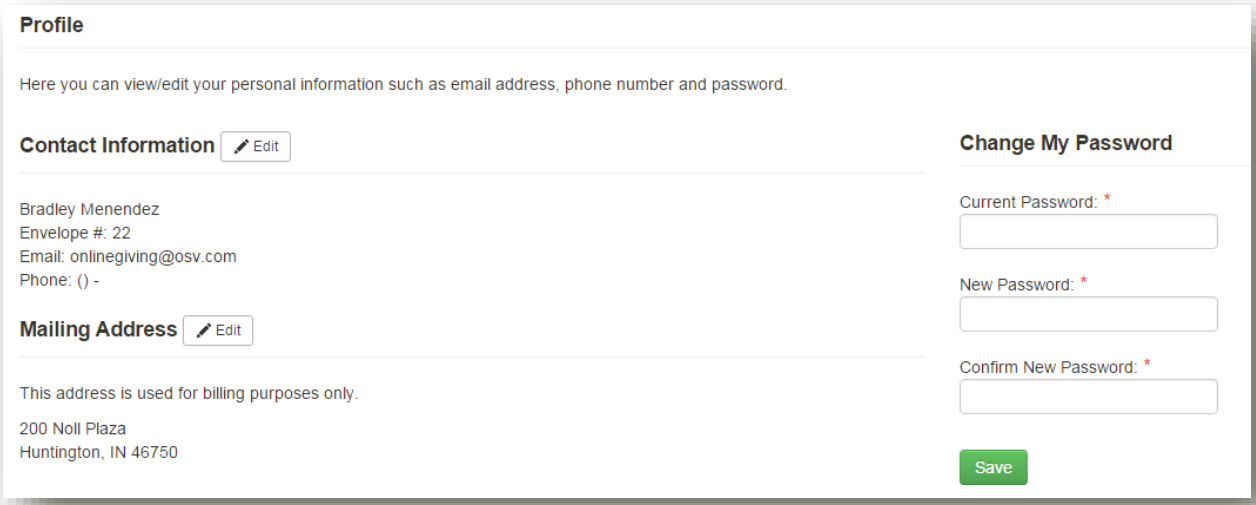
- Click ***Add Bank Account***
- This page will open
    - ***Bank Name –*** This is the name that appears in reports and when setting up your donations.
        - Many people will use the name of the bank – PNC, Chase, Joint and so on.
    - ***Bank Account Type*** – Checking, Savings
    - ***Routing Number*** – This is the location that you will enter your complete routing number.
        - If you are editing your payment method for any reason, you will need to reenter the entire routing number.
    - ***Confirm Routing Number*** – Confirmation of the routing number
    - ***Account Number*** – This is the location that you will enter your complete account number.
        - If you are editing your payment method for any reason, you will need to reenter the entire account number.
    - ***Confirm Account Number*** – Confirmation of the account number



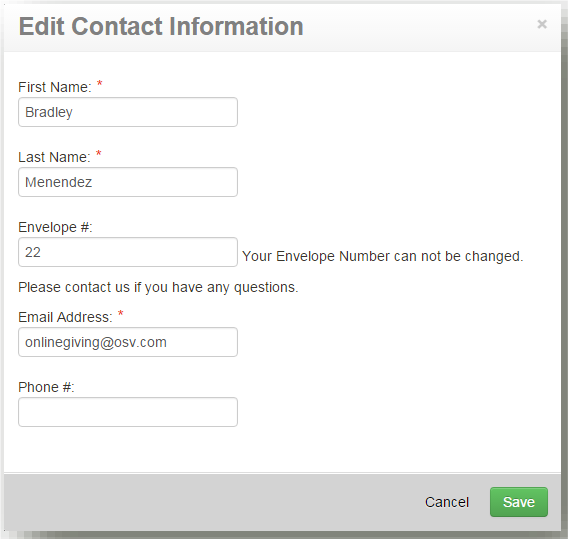
- ***Emter the code*** – This is required and helps the system know that you are a human creating an account and not a computer. This is for security purposes that you will need to solve the puzzle (clicking pictures as instructed).
- Click the green ***Save*** button

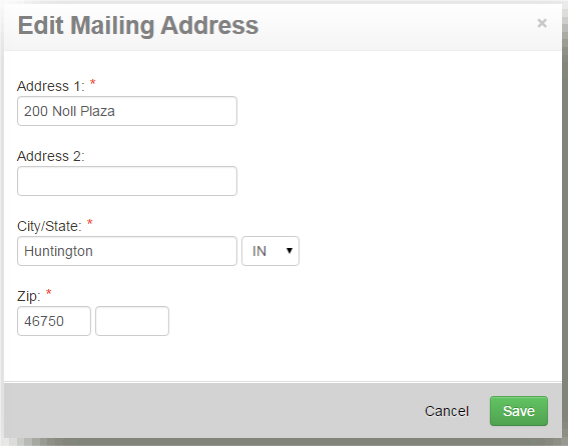
MY PERSONAL INFORMATION

This is the page that you will edit your contact information, mailing address or change your password.



Clicking opens the windows as seen below:





MY GIVING HISTORY

This page displays your giving history broken down by fund. You are at a glance able to see your Year to Date (YTD) and total given history.

Online Giving History

You can print reports by clicking **Print**.

Print

Name	Cal. YTD Given	Total Given
Building Improvement	$5,565.99	$7,268.99
Mass Intentions	$349.00	$477.00
School Tuition	$67.00	$67.00
Test Fund	$168.87	$168.87
This Fund is 50 Characters long.....	$436.40	$436.40
Weekly Offering	$10,824.67	$14,025.67

Page size: 50

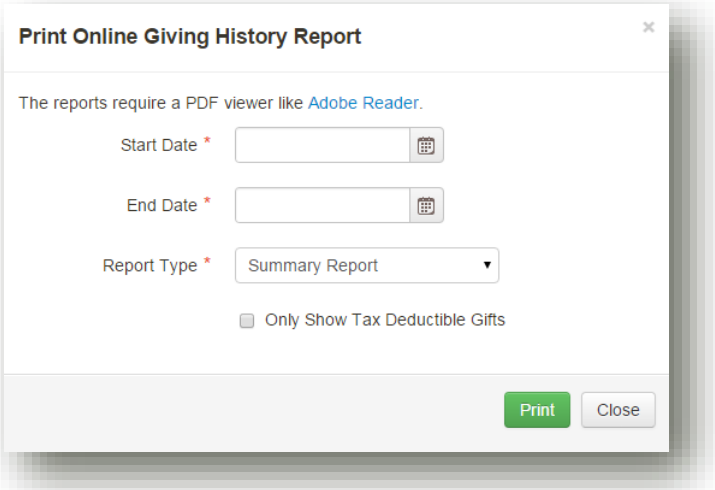
Clicking a fund name will expand all of your gifts given to that particular fund

Mass Intentions History

Payment Method	Type	Date	Amount	Confirm #
Test - 1111	Recurring	8/6/2015	$45.00	F86FJUCnx0
Test - 1111	Recurring	8/13/2015	$45.00	G8DFJQ3XP0
Test - 1111	Recurring	8/19/2015	$30.00	C8JFJEMkd0
Test - 1111	Recurring	8/20/2015	$45.00	E8KFJEfR40
Test - 1111	Recurring	8/27/2015	$45.00	F8RFJEsIE0

Clicking Print allows you to print either a summary or full detail report from the Online Giving system.

You will need a PDF viewer to print the report



- ***Start Date*** – The date you would like the report to start
- ***End Date*** – The date you would like the report to end
- ***Report Type*** - The type of report you would like to print
  - ***Summary Report*** – Similar to the giving history snap shot over the period defined. This prints an overall summary of your giving
  - ***Full Detail Report (Tax Purposes)*** – Provides a breakdown of all gifts given to what funds over the time period defined
- ***Only Show Tax Deductible Gifts*** – When clicked the reports will be filtered to only show gifts that are tax deductible.