for Church Members

Online Giving
USER GUIDE

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Online Giving User Guide
for Church Members

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Online Giving

About This Guide

This guide provides simple, step-by-step instructions to enable you to quickly set up and use the Online Giving application to make donations to your church. The guide uses realistic examples and numerous illustrations to step you through the process of contribution online to the funds of your choice. The guide is designed to to get you up and running quickly. After you accomplish the basics, you can use this document as a quick reference when you need information about a particular task.

Online Giving Features

Online Giving offers a powerful, simple way for you to contribute to your church and to completely manage your contributions online. If you have a bank account or if your church permits the use of a credit card, you can use the Online Giving application to donate electronically via your church's web-site. If you or any church member is unable to or prefers not to make donations to your church using the Online Giving application, church staff can set up your online account and manage it for you.

Among the top reasons for using Online Giving is its ease-of-use and convenience. The application is simple and intuitive, providing a point-and-click user interface that novice users and experienced computer users alike can learn to use quickly. The Online Giving system is also safe and secure. We have taken steps to guard your financial information so that it remains private and protected. Electronic contributions are less risky because, unlike cash or check contributions, they cannot be lost, stolen, or destroyed in the mail.

Online Giving offers key benefits for church members and staff. The advantages are highlighted in the following sections.

Advantages for Members

Online Giving offers many benefits to you and your family:

- Safe, secure system lets you make and keep stewardship commitments without having to write checks, hand in pledge cards, or make calls to the church office.
- Online Giving is convenient and donations can be made at any time and from any location. If you move away or if you are unable to attend church services because you are traveling or away for the season, you will find the option to give online especially accomodating because electronic giving can be done 24/7 and from anywhere in the world. The system enables you to designate gifts to specific ministries and funds of your choice and to do so anonymously, if desired.
- Web convenience gives you the freedom to change your account information or payment schedule any time you like.
- Full reporting lets you print year-end tax statements or view your Online Giving history for any time period.

Advantages for Your Church

Online Giving provides significant benefits for your church. First of all, it helps to fund your church's ministries with predictable income they can count on. It also simplifies the donation and record keeping process for church staff. Online Giving can save your church money because automatic contributions require less processing by administrative staff.

System Requirements

Online Giving is available 24/7 and requires no special hardware or software. For church administrators and individual member users of the system, all that is needed is an Internet connection and Web browser, including Microsoft® Internet Explorer 8.0 (or later), Firefox 2.0 (or later), Safari 3.0 (or later) or Google Chrome.

⚠ **CAUTION**

Cookies and Java Script must be enabled on your PC, and popup blockers must be disabled.

Turn off any system security programs or other programs that can block access (for example, Norton, McAfee, and the Google toolbar).

Online Giving Security

The Online Giving website provides a 128-bit secure browser connection to process your transactions and protect your information. Online Giving uses Secure Sockets Layer (SSL) to ensure that all of the information you enter is encrypted. To verify that SSL is functioning, look for the padlock or key icon in your browser.

To ensure that no one gains unauthorized access to your account, the Online Giving website uses a timeout feature to log you off if your account is inactive for a specific amount of time. This feature helps protect your account if you happen to leave your computer unattended.

Your information is stored on secure servers that are contained behind firewalls and other defense systems to prevent unauthorized access.

You can also take steps to keep your information private and secure by observing the following security practices:

- Never share your password with anyone.
- Change your password on a regular basis (every 60 days).
- Log out and close the browser window when you are done.
- Use antivirus software and keep the software updated on a regular basis.

Getting Help

Your church's Online Giving website is designed to be easy to use. If you have a question, short instructional videos are available throughout the application. If video help is available for a particular topic, this video link is displayed in the right corner of the screen:

Simply click the link to view the video help.

Contacting Us

If you have questions about the Online Giving application or need support while using the application, contact your church. Click the **Contact Us** link at the top of your Home page for your church's contact information.

Getting Started

This section shows you how to connect to your church's Online Giving website and how to create a personal Online Giving account. Creating a user account is a one-time process, which consists of two simple steps: connecting to your church's online website and creating a user ID and password. It takes just a few minutes to complete these tasks and set up your account.

Logging In to Your Online Giving Account

To log in, go to your church's Online Giving website, which is available from any web browser. A valid login is required to set up and view your online giving account. If you do not already have an account, you can create one (see "Creating a New Account" on page 5). The login is a necessary security protocol that protects your account information. The Online Giving website is secure so you can be certain that your information remains private.
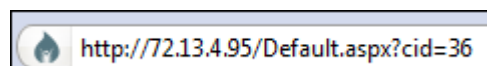
To log in, complete the following:

1. Open a Web browser application (for example, Microsoft Internet Explorer 8.0 or later, Mozilla Firefox 2.5 or later, Google Chrome, and Safari for Mac).

Note

If desired, you can open a second browser window and connect to another organization's website at the same time.

2. Enter your church's Online Giving URL (Internet address) in your browser's address field. For example:

Your website opens to your church's Welcome page, similar to the one shown in Figure 1:

You see this Watch Help Video icon on every web page that provides video assistance.

View answers to questions frequently asked about Online Giving

Contact a church staff member by phone or email

Log in to your account

Create a new account

Retrieve a forgotten User ID and/or password

Figure 1. Welcome Page

3. Add the website to your list of frequently visited sites:

    •   Firefox users: select **Bookmarks > Bookmark this Page**

    •   Internet Explorer users: select **Favorites > Add to Favorites**.

4. Enter your **User ID** and **Password** in the **Existing User Login** section (Figure 2):

Figure 2. User Login

5. Click [LOGIN].

   Your Home page is displayed (see Figure 6). For information about the Home page, see "Your Home Page" on page 9.

Creating a New Account

To create a new account, follow these steps:

1. On the Welcome page (Figure 1), select the link **Create New Account** or **Sign up for a New Account**.

   The **New User Account Registration** window is displayed:

Figure 3. Creating a New User Account

2. Complete the fields on the form. Descriptions and requirements for these fields are provided on page 6.

Note

The asterisk (*) indicates a required field.

3. When done, click [SUBMIT].

   After we validate the request, we will send you an email containing your User ID and Password. The email also includes the address for your church's Online Giving website. Follow the instructions included in the email. Note that you must reply to the email to activate your account.

   To go to the Online Giving website, you can select the link or copy the entire URL and paste it into the Web browser's address field.

Required Information for a New Account

Table 1 describesthe information required for the fields on the **New User Account Registration** window (shown in Figure 3)..

Table 1: New User Account Registration Fields

Login Information	
User ID*	Required. Case Sensitive. Your User ID must contain both alphabetic and numeric characters and be between 6–12 characters in length (for example, giver123).
Password*	Required. Case Sensitive. For security reasons, your password must include at least one of each of the following characters: alphabetic, numeric, and keyboard characters such as the ampersand, exclamation point, or asterisk (for example, giving43!).
Confirm Password*	Required. Case Sensitive. Enter your Password exactly as you did in the **Password** field.
Registration Code	The Registration Code provides administrator-level access to church staff members. Your Online Giving provider will give you this number.
Personal Information	
First Name*/**Last Name***	Required.
Email Address*	Enter your complete email address. The Online Giving system restricts users to one account per email address. Multiple accounts with the same email address are not permitted.
Phone	Recommended but not required.
Address Information	
Address 1* **City/State*** **and Zip***	Required
Address 2	Optional.

Retrieving Forgotten Login Credentials

You do not need assistance to retrieve a forgotten user ID or password. The information in this section shows you how to retrieve this information for yourself.

What If I Forget My User ID?

If you forget your User ID, complete the following steps to receive an email reminder containing your User ID information.

1. In the **Existing User Login** section on the Welcome window (Figure 1), select the link **Forgot User ID.**

   The **Forgot your User ID?** window is displayed:
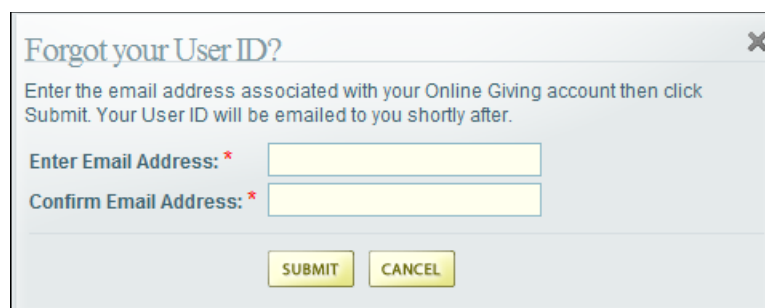
Figure 4. Forgot your User ID? Window

2. Type the email address associated with your Online Giving account in both fields. Then, click [SUBMIT].

   After we validate your request, we will send an email containing a reminder of the User ID to the email address in the account holder's profile. Note that for security reasons, we do not include the password in this email.

What If I Forget My Password?

If you forget your Password, complete the following steps to receive an email reminder containing your account password.

1. In the **Existing User Login** section on the Welcome page (Figure 1), click the **Forgot** **Password** link.

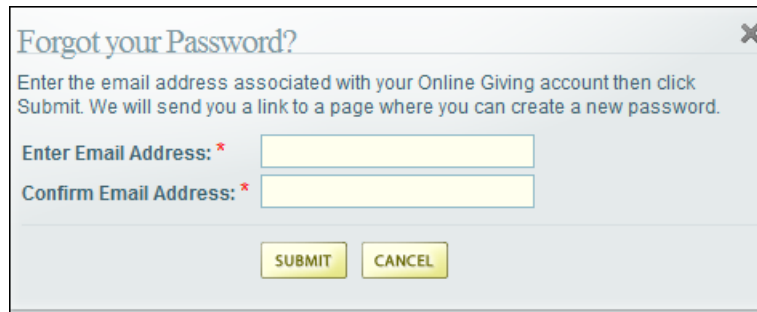   The **Forgot your Password?** window (Figure 5) is displayed:

Figure 5. Forgot Your Password? Window

2. Type the email address associated with your Online Giving account in both fields. Then,

   click ⬚.

   After we validate your request, we will send an email containing a password reminder to the email address on file for the account. Note that for security reasons, we do not include the User ID in the password reminder email.

Viewing Your Home Page

After you log in to your account, your Home page is displayed. The features on your Home page are identified in Figure 6 and in detail in the later sections of this guide.

Name of your church.

Online Giving FAQ is a list of questions frequently asked by church members.

Contact Us provides contact information so you can connect quickly to your church office.

Your login name and **Sign Out** link.

Your name identifies your Home page.

Manage My Account provides five icon-marked links that enable you to manage your contributions, payment methods, and your personal information.

My Giving Snapshot shows your year-to-date (YTD) and all-time giving totals.

My Recent Gifts shows your last five contributions.

Figure 6. Your Home Page

Logging Out of Your Online Giving Account

As a security measure, you should always log out and close your browser after you finish accessing your Online Giving account.

To log out of your account:

1. Click the **Sign Out** link. This link appears in the upper right corner of any page.

   Your church's Welcome page (Figure 1) is displayed.

2. Close your browser. To do this, click ❌ .

Managing Your Accounts

This section shows you how to make a contribution to one or more funds of your choice. You can make a recurring (regular) contribution, a pledge, or a one-time donation. This section also shows you how to change how you pay for your contribution if you decide later that you want to make changes to your initial setup.

Making an Online Contribution

The process of making an online contribution consists of two main steps:

1. Specify your method of payment.

2. Give a gift to the fund of your choice.

Detailed instructions for each step are given in this section.

Step 1: Specify Your Method of Payment

Before you can make an online contribution, you need to specify the methods you will use to pay for your gifts.

Note

You church determines which payment methods can be used to pay for gifts; that is, whether you can use a bank account, a credit card, or both.

To specify the type of payment, follow these steps:

1. On your Home page (Figure 6) or from the **Manage My Account** link, select the **My Payment Methods** option:
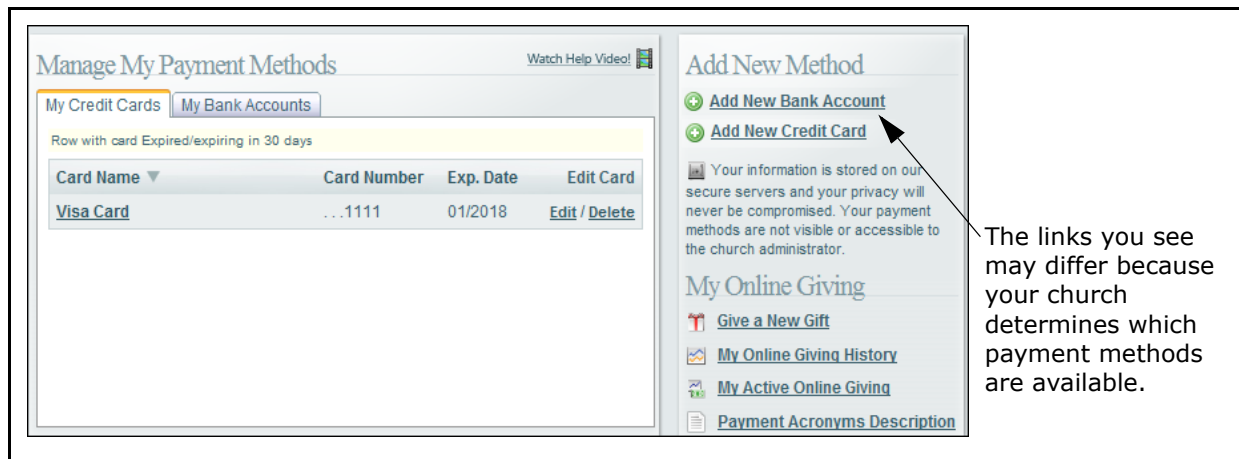
The **Manage My Payment Methods** window (Figure 7) is displayed. This window has two panes. The left pane lists all of your accounts. This pane is empty the first time you log in. After you add your payment methods, you will see them listed in the left pane.

The right pane contains links you use to add a new account. Your church determines which links you see here. For example, if your church does not accept credit cards as a payment method, you will not see the **Add New Credit Card** link.

The lower portion of the right pane also includes links to help you manage your accounts. These links are described in detail later in this manual.

Notes

Any accounts that are set up for online giving are displayed on the tabs in the left pane. So after you add your accounts, just select the desired tab to see the name of the account.

The links you see may differ because your church determines which payment methods are available.

Figure 7. Manage My Payment Methods Window

2. In the right pane, select the desired link:

Note

*Your church determines the payment methods it accepts so the **Add New Credit Card** option may not be listed.*

• **Add New Bank Account**

• **Add New Credit Card**

3. Depending on the payment option you selected in Step 2, do one of the following:

    •   If adding a new bank account, enter the required information in the **Add New Bank Account** window, shown in Figure 8:

        Note

        Required fields are identified by an asterisk (*). Descriptions of the fields in this window are provided under "Bank Account Fields" on page 14.

Figure 8. Adding a New Bank Account

When done, click SUBMIT to save your account information in the Online Giving system.

Your bank account is now set up and ready to be used to give a gift. Go to "Step 2: Give a Gift to the Fund of Your Choice" on page 15.

    •   If adding a new credit card, enter information in the **Add New Credit Card** window, shown in Figure 9:

        Note

        Required fields are identified by an asterisk (*). Descriptions of the fields in this window are provided under "Credit Card Account Fields" on page 13.

Figure 9. Adding a New Credit Card

When done, click to save your account information in the Online Giving system.

Your credit card account is now set up and ready to be used to give gifts. Go to "Step 2: Give a Gift to the Fund of Your Choice" on page 15.

Credit Card Account Fields

Table 2 describes the information fields in the **Add New Credit Card** window. An asterisk (*) identifies required fields.

Table 2: Credit Card Account Fields

Field	Description
Accepted Cards	Your church accepts the cards shown. For example:
Card Alias*	Required. Enter a description to help you identify the card (for example, "LL Bean Visa" or "MasterCard with Joe's picture").
Card Number*	Required. Enter your complete card number with no spaces, special, or alphabetic characters. • Visa account numbers require 16 digits and begin with the number 4. • MasterCard account numbers require 16 digits and begin with the number 5. • American Express account numbers require 15 digits and begin with the number 3. • Discover account numbers require 16 digits and begin with the number 6.
Expiration Date*	Required. Click and then select the month and year.
Address	Not required. If the billing address on your card differs from the address that you entered for your user account, click the link to enter your billing address.
Phone Number*	Required. Enter your phone number.
Address Line 1*	Required. Enter the first line of the address (primary address number and street name) that is on file with your credit card company.
Address Line 2	If applicable, enter the rest of your address, such as the apartment number or building, that is on file with your credit card company.
City*	Required. Enter the city on file with your credit card company.
State*	Required. Click and then select the state on file with your credit card company.
ZIP*	Required. Enter the ZIP Code on file with your credit card company.

Bank Account Fields

Table 3 describes the information fields in the **Add New Bank Account** window. An asterisk (*****) identifies required fields.

Table 3: Bank Account Fields

Field	Description
Bank Alias***	Required. Enter the name of the banking institution for your account.
Account Type***	Click ☑ and then select **Checking** or **Savings**. The **Checking** option is the default.
Account Number***	Required. Account numbers must contain 4 to 17 digits. No spaces, special characters, or alphabetic characters are permitted.
Confirm Account Number***	Required. Enter your account number again for validation and security purposes.
Routing Number***	Required. The routing number requires nine digits and must begin with one of the following numbers: 0, 1, 2 or 3. No spaces, special characters, or alphabetic characters are permitted.
Confirm Routing#***	Required. Enter your routing number again for validation and security purposes.

Sage Payment Terms and Definitions

Sage Pay is a payment service provider that enables you to make Online Giving payments to your church from your bank account or by credit card. You can view a glossary of Sage Pay terms and abbreviations by clicking the link **Payment Acronyms Descriptions**, which is located in the right pane of the Manage My Payment Methods window (see Figure 7 on page 11).

Step 2: Give a Gift to the Fund of Your Choice

This procedure shows you how to set up each of your gifts for online giving.

Note

*Each gift has its own **Cancel Gift** button, which enables you to selectively cancel the setup for any gift. If you decide to cancel a gift, you must do so before clicking the **Submit** button to save it.*

1. On your Home page (Figure 6) or from the **Manage My Account** link, select **Give a New Gift**:
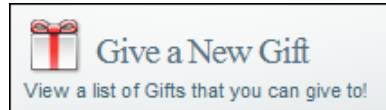
The church funds available for giving are displayed, as shown in Figure 10. Your church determines which funds are listed and available for online giving and the types of contributions (for example, pledge) that you can make to a fund.

Figure 10. Funds Available for Gift Giving

2. For each fund that you want to contribute to, select the type of gift:

Note

Not all gift types are available for all funds.

•   **Recurring:** a gift amount that is given at regular intervals (that is, monthly or yearly).

•   **Pledge**: a gift amount that is promised as a contribution. A pledge can consist of a one-time contribution or a down payment followed by recurring contributions until the promised amount is paid.

•   **One Time**: a gift amount that is given once only.
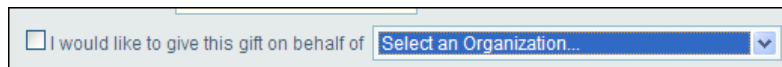
After you make your selection, detailed text entry fields pertaining to the gift type are displayed.

3. Depending on your selection in Step 2, do the following:

•   If you selected **Recurring**:

    a. Specify the payment amount, payment frequency (for example, **Monthly** or **Yearly**), and the start date for making payments.

    b. Select the account to charge (the accounts you set up in Step 1 as payment methods are listed in the box).

    c. If desired, check the **Remain Anonymous** box.

        The church is not given your name as the benefactor for any gifts you designate as anonymous. Anonymous donations, however, are listed in your personal giving reports, which are available to you (via your secure login) from the Online Giving website.

    d. (Higher entity organizations only) If your giving is for a higher entity (such as a diocese), select the organization that you want to give the gift on behalf of.
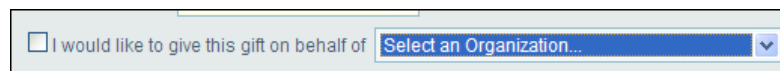

•   If you selected **Pledge**:

    a. Specify the pledge amount and the start date for making recurring payments.

    b. Select the account to charge (the accounts you set up in Step 1 as payment methods are listed in the box) and select the payment frequency (for example, **Monthly** or **Yearly**).

    c. If you want to make a downpayment, specify the amount of the payment and select the account to charge. This is a one-time payment that is processed on the current day.

d. If desired, check the **Remain Anonymous** box.

The church is not given your name as the benefactor for any gifts you designate as anonymous. Anonymous donations, however, are listed in your personal giving reports, which are available to you (via your secure login) from the Online Giving website.

e. (Higher entity organizations only) If your giving is for a higher entity (such as a diocese), select the organization that you want to give the gift on behalf of.

☐ I would like to give this gift on behalf of Select an Organization... ▾

- If you selected **One Time**:

a. Specify the payment amount and the payment date.

b. Select the account to charge (the accounts you set up in Step 1 as payment methods are listed in the box).

c. (Credit Card only) If desired, select the check box **Add an Additional Gift** to pay an additional $3.00 to offset the cost of the processing fees to the church.

d. If desired, check the **Remain Anonymous** box.

The church is not given your name as the benefactor for any gifts you designate as anonymous. Anonymous donations, however, are listed in your personal giving reports, which are available to you (via your secure login) from the Online Giving website.

e. (Higher entity organizations only) If your giving is for a higher entity (such as a diocese), select the organization that you want to give the gift on behalf of:

☐ I would like to give this gift on behalf of Select an Organization... ▾

f. If you want to provide special instructions to accompany your gift, enter that information in the **Special Instructions for my One Time payment** box (500-character limit). For example, you might include a special note if your gift is in memory of someone, for a second collection, or for payment of a special fee.

3. When you are finished setting up all of your gifts, click NEXT .

The **Confirm My Gifts** window is displayed. Do one of the following:

- If the details of your gift are correct, click SUBMIT .

- If certain information is not correct, click BACK , make the necessary corrections, and then click NEXT to return to the **Confirm My Gifts** window. Click SUBMIT .

A receipt is displayed to inform you that your gift was processed. A copy of the receipt is sent to the email address on file for your account.

The transaction is processed automatically on the date you specified. The money is transferred from the account of your choice directly into your church's bank account.

The Online Giving System will send you a reminder email 3-5 days prior to processing the payment from your account.

4. If desired, click [PRINT] to print a copy or your receipt or click [FINISH] to return to your Home page.

What Happens If My Gift Payment Cannot Be Processed?

If your gift payment cannot be processed, you will receive an email notifying you of the issue. The most likely cause for a processing failure is an expired account or an account number has an incorrect digit.

To correct the situation, follow these steps in the order listed:

1. Verify your credit card or bank account information in the Online Giving system (under My Payment Methods). If necessary, make changes to correct any inaccuracies. You need to enter the full account number because the Online Giving system does not store this information.

Note

Sage stores credit card and bank account information.

2. Call your bank or credit card company to report the problem and determine a possible cause.

3. If the problem cannot be identified and fixed by using Steps 1 and 2 above, contact your church office to report the issue.

Modifying a Payment Method

This section describes how to change the way in which you pay for an Online Giving contribution. Use this method to update a credit card, add a new card, or delete a card that you no longer want to use.

Note

You can use only those payment methods allowed by your church.

Changing a Payment Method

At any time, you can change how you want to pay for a gift. Changing a payment method will not stop the payment for a transaction that is in process. Only future scheduled payments are discontinued.

1. On your Home page or from the **Manage My Account** link, select **My Payment Methods.**

    The Manage My Payment Methods window (Figure 7 on page 11) is displayed.

2. Under **Edit Card**, select the **Edit** link and then update the account information as needed.

Note

See "Credit Card Account Fields" on page 13 if you have questions about the information that is required.

3. Click [SUBMIT] to save your changes.

   Your payment method is now changed.

Deleting a Payment Method

When you delete a payment method, your account is completely removed from the system. If you have active gifts scheduled for payment, the system asks if you want to designate another account for payment of those gifts. If you need to suspend or cancel a gift, see ""Temporarily Stopping Payments for a Gift" or "Cancelling an Active Gift" for details.

1. On your Home page or from the **Manage My Account** link, click **My Payment Methods** to display the **Manage My Payment Methods** window (Figure 7 on page 11).

2. Under **Edit Card**, select the **Delete** link.

   A message requesting that you confirm the deletion is displayed.

3. Do one of the following:

   • If you have no gifts using the account, click [SUBMIT] to confirm the deletion or click [CANCEL] to exit without deleting.

   • If you have active gifts scheduled for payment using the account, those gifts are listed. You are asked to designate another account for payment of those gifts.

      – If you want to choose a different payment method, check the **Yes** box and then select one of your other payment methods. Then, click [SUBMIT] to save the change.

      – If you do not want to choose a new payment method for the listed gifts, leave the **Yes** box unchecked. Then, click [SUBMIT] to delete the payment method. Contributions to your gifts are suspended. No further payments are made until you choose a new payment method for the gifts.

   The system returns you to the **Manage My Payments** window (Figure 7).

Changing Your Personal Information

At any time you can update your personal information, including your email address, mailing address, and phone number. You can also change the password on your Online Giving account.

1. On your Home page or from the **Manage My Account** link, select **My Personal Information**:

The **My Personal Information** window (Figure 11) is displayed:

Figure 11. Viewing and Changing Your Personal Information

Your name, envelope number, email address, and phone are displayed in the left pane. In the center pane, your current address, city, state, and ZIP Code are listed. The right pane is where you can change your password.

2. To update the information in the left or center pane, click either **Edit Contact Information** or **Edit Mailing Address**. Update the information as needed and then click ⟨ SUBMIT ⟩ to save.

Note

You may not be able to change the **Envelope#** *field. This number is used for administrative purposes, and if your church administrator has already verified the number, you cannot change it.*

3. To change your password, enter your current password. Then, enter your new password and re-enter your new password. Select the **<u>Save</u>** link to update your password.

Notes

As a security precaution, you should change your password on a regular basis. We recommend that you do this every 60 days.

Passwords must be between 6-12 characters long. You must use at least one of the following: an alphabetic character, a number, and a keyboard character, such as an asterisk (*) or an exclamation point (!).

Managing Your Contributions

This section shows you how to view a list of your contributions (active and suspended) and how to make changes to your active gifts. You will also learn how to temporarily stop payments as well as how to permanently cancel a gift. If you want to print a report of your contributions, this section shows you how.

Viewing Your Active Contributions

1. On your Home page or from the **<u>Manage My Account</u>** link, select **My Active Online Giving**:

The **My Active Online Giving** (Figure 12) window is displayed.

This window shows your active gifts (●) and suspended gifts (✖), the next processing date for each gift, year-to-date giving totals, total amounts given, and pledged amounts, if any, for each fund.

Figure 12. My Active Online Giving Window

Customizing the Display of Active Contribution Information

Information about your contributions is initially displayed using the application's default settings. You can change default settings so that information is presented to suit your needs. This section shows you a couple of ways to reorganize your active online giving information.

Sorting the Display of Contribution Records

You can sort the records listed by clicking any one of the column headings. A sort icon appears to the right of the column name to indicate the column you are sorting on and the direction of the sort:

▲ : sorts the records in ascending order so that successively higher values (numeric or alphabetic) are displayed as you proceed down the page. That is, if the column displays numeric values, they are displayed from higher to lower. If the column displays alphabetic values, they go from Z to A.

▼ : sorts the records in descending order so that successively lower values (numeric or alphabetic) are displayed as you proceed down the list. That is, if the column displays numeric values, they are displayed from lower to higher. If the column displays alphabetic values, they go from A to Z.

Figure 12 shows an alphabetic sort in descending alphabetic order on the **Gift Name** column. However, if you have a long list of gifts and want to see when your next scheduled payment is, you may find it more useful to sort on the **Next Gift Date** column to view that information.

Changing the Number of Records on a Page

By default, five records are displayed on a page at one time. To change the number of records that you can view on a single page, select the desired option from the **Display** box (see Figure 12). Options range from 5 to 100 records per page.

Paging Through the List
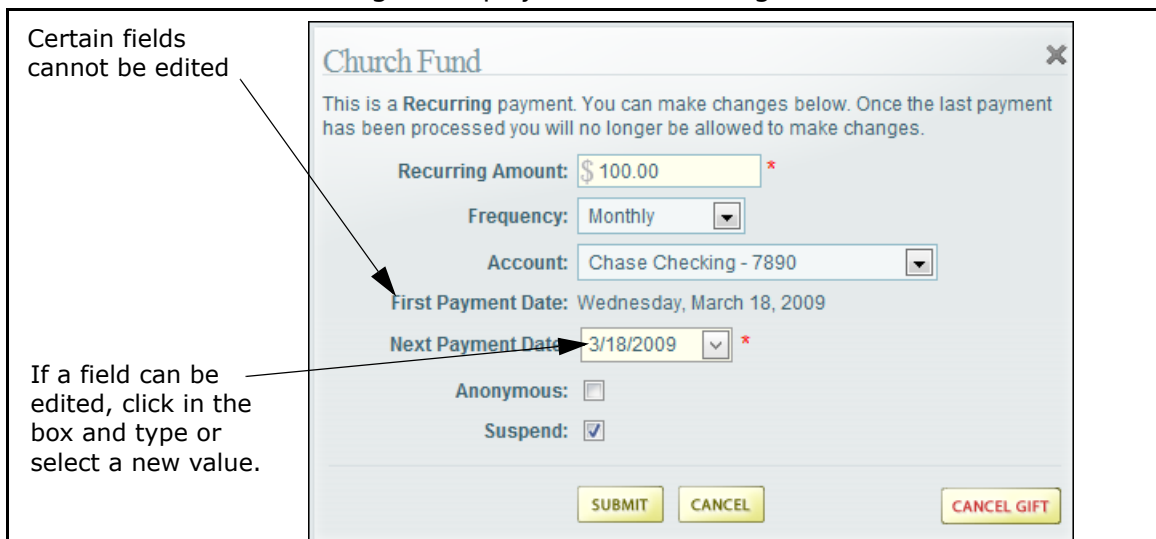
The page buttons (see Figure 12) let you navigate quickly to specific pages in your list of active online giving. Simply click the desired page number button to display the gifts listed on that page.

Changing a Gift

You can change a gift at any time to adjust the payment amount, modify the payment frequency, select a different account to charge, or change the next payment date.

1. Display the **My Active Online Giving** window (Figure 12).

2. Click ✎ (Edit) for the gift you want to change.

    Detailed information for the gift is displayed, as shown in Figure 13:

Figure 13. Editing a Gift

The details vary depending on the type of gift you are editing. In general, you can see the current contribution amount, payment frequency and payment dates, and account information.

Certain information cannot be changed. If a field is editable, you can click in the box and change the information. For example, for the gift shown in Figure 13, you cannot change the **First Payment Date**, but you can change the next payment date and the account used to pay for your gift.

3. To make a change, edit the desired field. Then, click [SUBMIT] to save.

Temporarily Stopping Payments for a Gift

You can temporarily stop or suspend future payments for a gift. Suspended gifts are not processed again until you indicate that you want payments to resume.

When you suspend payments, only the selected gift is affected. Therefore, if you have other Online Giving gifts for which you want to suspend payment, you must do so individually for each gift.

To suspend payments for a gift:

1. Display the **My Active Online Giving** window (Figure 12).

2. Click (Edit) for the gift you want to suspend.

3. Select (check) the **Suspend** box.

4. Click

   The **My Active Online Giving** window (Figure 12 on page 22) is displayed. In the **Status** column for the gift, the following icon is displayed to indicate that payments for the gift are currently suspended: ( ).

   To resume payments for a suspended gift, follow the instructions under "Resuming Payments for a Suspended Gift", which follows.

Resuming Payments for a Suspended Gift

To resume payments for a suspended gift, complete the following:

1. Display the **My Active Online Giving** window (Figure 12).

2. Click (Edit) for the gift you want to resume payment for.

3. Uncheck the **Suspend** box.

4. Select your **Next Payment Date. Click** and then select the date from the calendar.

5. Click .
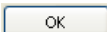
   The **My Active Online Giving** window (Figure 12) is displayed. In the **Status** column for the gift, this icon is displayed to let you know that the gift is active: . Payment processing for the gift will resume on the **Next Gift Date**.

Cancelling an Active Gift

An active gift is a gift that you are currently contributing to. You can cancel an active gift at any time. The cancellation stops future processing of payments for the gift. A historical record of all prior gifts is retained in the system for reporting purposes.

1. Display the **My Active Online Giving** window (Figure 12).

2. Click ✏️ (Edit) for the gift you want to suspend.

3. Click CANCEL GIFT .

    A message is displayed requesting that you to confirm the cancellation.

4. Do one of the following:

    • Click OK to cancel the gift.

        The gift is permanently removed from the Online Giving system.

    • Click Cancel to exit without cancelling the gift.

Viewing a Summary of Active Contributions

1. Click 🕐 (clock icon) for the gift you want to view.

    A summary report that shows your contributions to the fund is displayed. This report details your payment methods, the type of contribution, the dates of contribution, amounts, and the confirmation number for each transaction.

    Note that the date range for your giving history defaults to January 1 of the current year to today's date.

2. Click the calendar icons to choose a different date range. Then, click the **Apply Filter** link to view information for the date range you specified.

Viewing Your Giving History

You can view a detailed history of all of the contributions that you have made since you began using the Online Giving system.

1. On the Home page (Figure 6) or from the **Manage My Account** link, select **My Online Giving History**:
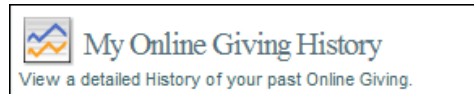
The **My Online Giving History** window (Figure 14) is displayed:

Figure 14. My Online Giving History Window

This window lists all of the funds you have given gifts to since you began to use the Online Giving system. You can see year-to-date contribution amounts (**Cal. YTD Given**) and the total amount you have ever contributed (**Total Given**) for each fund.

2. To view a detailed giving history for a specific gift, select the fund link in the **Gift Name** column or select the **View** link in the **Details** column.

The giving history for the selected fund is displayed. For example, Figure 15 shows a giving history for the School Building Growth Fund.

Note

Rejected contributions are identified in red text. They are not included in your giving totals.

Figure 15. Detailed Giving History for a Selected Fund

This window details your payment methods, the gift type (pledge, recurring, or one time), the dates of contribution, amounts, and the confirmation number for each transaction.

Note that the date range for your giving history defaults to January 1 of the current year to today's date.

3. To choose a different date range, click the calendar icons and select the from-to dates. Then, click the **Apply** link.

The information is updated, and contributions for the date range you specified are displayed.

Customizing the Display of Giving History Information

Information about your contributions is initially displayed using the application's default settings. You can change default settings so that information is presented to suit your needs. This section shows you a couple of ways to reorganize the information.

Sorting the Display of Contribution Records

You can sort the records listed by clicking any one of the column headings. A sort icon appears to the right of the column name to indicate the column you are sorting on and the direction of the sort:

▲ : sorts contribution records in ascending order so that successively higher values (numeric or alphabetic) are displayed as you proceed down the page. That is, if the column displays numeric values, they are displayed from higher to lower. If the column displays alphabetic values, they go from Z to A.

▼ : sorts contribution records descending order so that successively lower values (numeric or alphabetic) are displayed as you proceed down the list. That is, if the column displays numeric values, they are displayed from lower to higher. If the column displays alphabetic values, they go from A to Z.

Figure 12 shows an alphabetic sort in descending alphabetic order on the **Gift Name** column. However, if you have a long list of gifts and want to see when your next scheduled payment is, you may find it more useful to sort on the **Next Gift Date** column to view that information.

Changing the Number of Records on a Page

By default, five records are displayed on a page. To change the number of records displayed on a single page, select the desired option from the **Display** box (see Figure 12). Options range from **5** to **100** records per page.

Paging Through the List

The page buttons (see Figure 12) let you navigate quickly to specific pages in the list. Simply click the desired page number button to display the gifts listed on that page.

Viewing and Printing Contribution Reports

This section describes the types of online giving reports that you can view and print.

Summary Report of Contributions to a Specific Fund

1. Display the **My Active Online Giving** window (Figure 12).

2. Click ⏱ (clock icon) for the gift you want to view.

   A summary report that shows your contributions to the fund is displayed. This report details your payment methods, the type of contribution, the dates of contribution, amounts, and the confirmation number for each transaction.

   Note that the date range for your giving history defaults to January 1 of the current year to today's date.

3. Click the calendar icons to choose a different date range. Then, click the **Apply Filter** link to view information for the date range you specified.

4. Click 🖨 PRINT.

   A PDF of your report displayed.

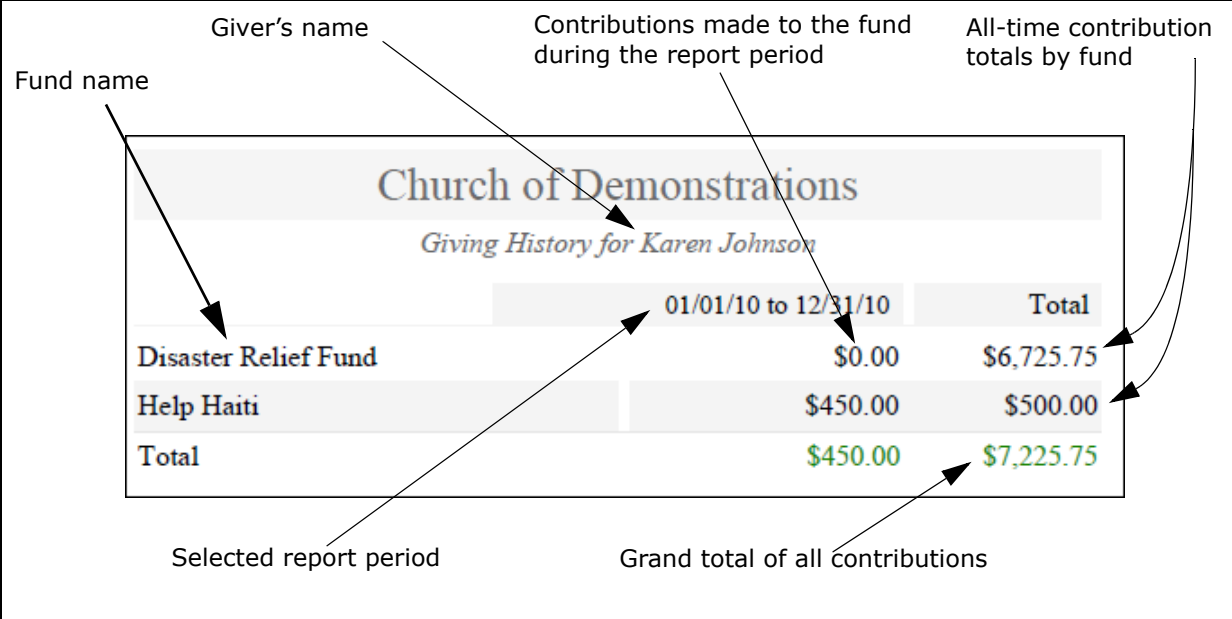5. At the top of the PDF report viewer, choose any of the following:

   • Click 🖨 to print the report.

   • Click 💾 to save a copy of the report.

   • Click 📧 to attach a PDF of the report to a new email message.

Active Giving Report

1. Display the **My Active Online Giving** window (Figure 12).

2. Select the link **Print Active Giving Report.**

   A PDF summary report of your active giving is displayed.

3. At the top of the PDF report viewer, choose any of the following:

   • Click 🖨 to print the report.

   • Click 💾 to save a copy of the report.

   • Click ✉ to attach a PDF of the report to a new email message

Giving History Reports

Note

To print a history report, you need to have Adobe Reader installed on your PC or laptop computer. To obtain the latest version of Adobe Reader, go to **http://get.adobe.com/reader/***.*

To print a report of your giving history:

1. Display the **My Online Giving History** window (Figure 14).

   All of your contribution records are displayed.

2. Click [🖨 PRINT] to display the **Print Online Giving History Report** window, as shown in Figure 16:
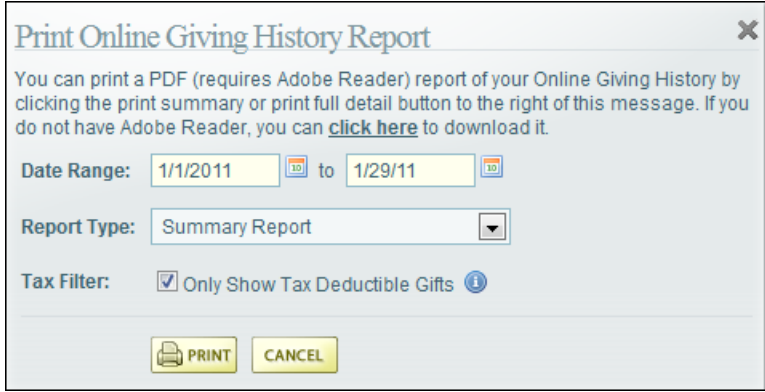
Figure 16. Print Online History Report Window

3. In the **Date Range** fields, click 🗓 and then use the calendar to select a date range for the report.

4. Select the type of report that you want to print:

    • **Summary Report**: displays a summary of contribution amounts for all gifts (see Figure 17).

    • **Full Detail Report (Tax Purposes)**: displays detailed information for each contribution made during the date you specified in Step 3.

5. The **Only Show Tax Deductible Gifts** is checked by default. When, checked the report shows tax deductible contributions only. If desired, clear this box.

6. Click [🖶 PRINT] .

    The report is displayed in PDF format.

7. At the top of the PDF report viewer, choose any of the following:

    • Click 🖨 to print the report.

    • Click 💾 to save a copy of the report.

    • Click ✉ to attach the PDF to a new email message.

Figure 17 shows an example of a summary report. This report shows the giver's total contributions made to each fund during the selected report period (January 1, 2010 to December 31, 2010), all-time contributions to each fund, and a grand total of contributions made to all funds.

Figure 17. Summary Report of Total Contributions

Figure 18 shows a full detail report for all contributions given during the specified period (January 1, 2011 to December 31, 2010). This report includes tax deductible contributions only.
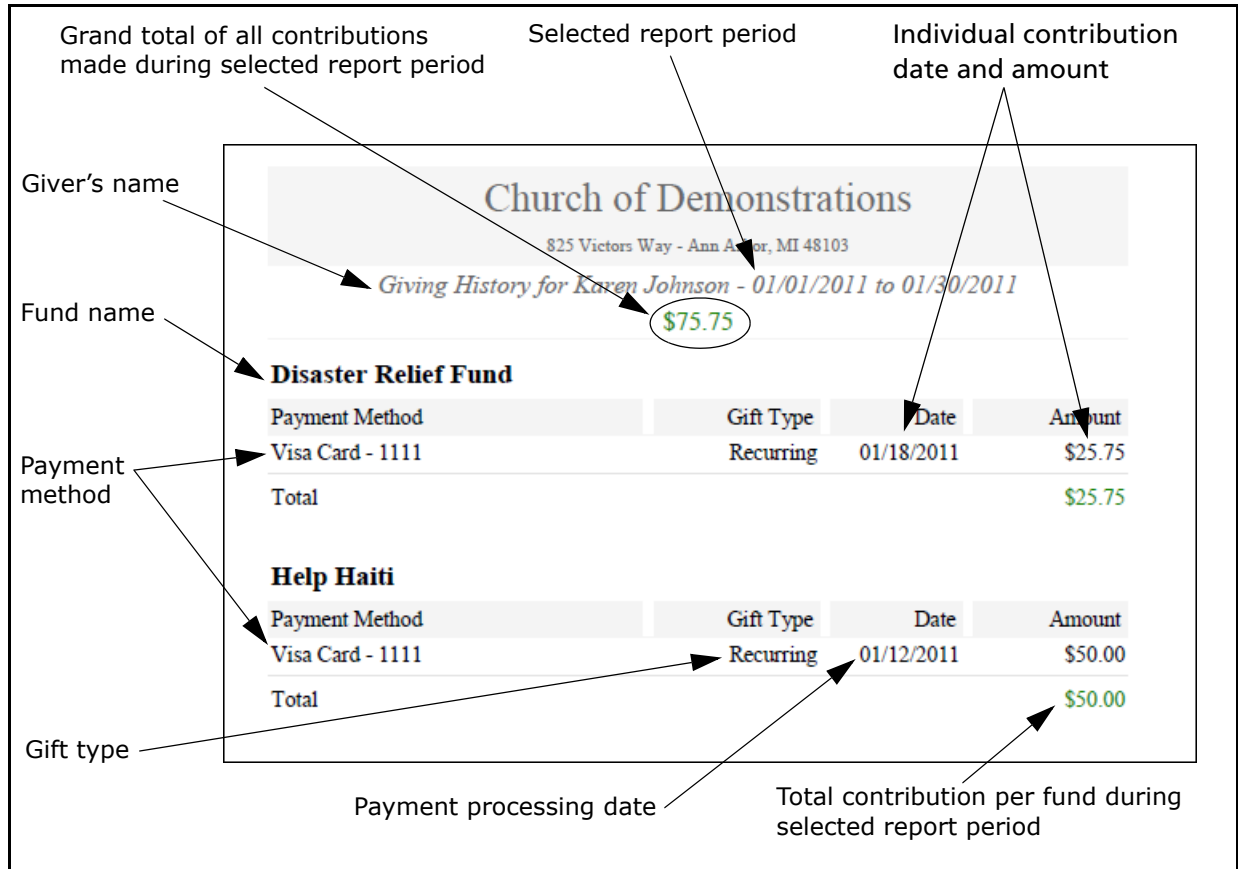
Figure 18. Full Detail Report (for Tax Purposes)

Contribution Details Report

1. Display the **My Online Giving History** window (Figure 14).

2. Select the link for the name of the gift. For example, Offering.

   Contribution details for the gift are displayed:

Offering History				✕
Date Range: 1/1/2011 🔟 to 1/29/11 🔟 Apply Filter	Explanation of Payment Acronyms			🖨 PRINT
Payment Method	**Type**	**Date ▲**	**Amount**	**Confirm #**
Visa Card - 1111	Recurring	1/18/2011	$77.25	A1IBM0NbJ0
Visa Card - 1111	Recurring	1/12/2011	$50.00	B1CBN0dbC0

   Rejected contributions appear in red text. These are **not** reflected on your giving totals.

Figure 19. Contribution Details

3. In the **Date Range** fields, click 🔟 and then use the calendar to select a date range for the report. Then, select the link **Apply Filter** to view a list of contributions for the date range you specified.

   An updated report is displayed.

4. Click 🖨 PRINT .

   The report is displayed in PDF format.

5. At the top of the PDF report viewer, choose any of the following:

   • Click 🖨 to print the report.

   • Click 💾 to save a copy of the report.

   • Click 📧 to attach the PDF to a new email message.

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