Online Giving User Guide
for Church Administrators

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Introduction to Online Giving

Online Giving offers you a simple yet powerful way to enable church members to give to their church and to completely manage their contributions online. Any member with a bank account or a credit card can use the application to donate electronically to the funds of their choice via their church’s website. For members who are unable or who prefer not to use the Online Giving application, church staff can set up and manage online accounts for them. 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 quickly and easily. Giving can be done automatically on a user-defined schedule via electronic transfers from a checking account or (if the church permits) automatic payments from a credit card.

The Online Giving system is safe and secure. Givers can be assured that their financial information will remain protected and private. Key benefits for church members and staff are summarized below.

Advantages for Members

Online Giving is the ideal solution for members who want to use the Internet to manage their personal finances and business. This method of giving costs nothing for members as they are charged no administrative or operation fees to use the system. In addition, Online Giving is safe and secure. Electronic gifts cannot be lost or stolen, and members can keep their personal information private because confidential data is directly entered into a secure Online Giving site. The system uses the most current encryption methods to help safeguard a giver’s privacy.

After creating an account, members can log in to the website and accomplish their charitable objectives in a variety of ways: by making a pledge, a one-time gift, or a recurring contribution. At any time, members can easily adjust the amount and/or timing of their contributions and cancel a gift at any time before the date of their next contribution. Contributions are easily made by using a checking account or, if the church permits, a credit card. In addition, there’s no waiting for the mail to obtain contribution statements and summaries of past donations because these documents are available online at any time.

Online Giving is convenient and donations can be made at any time and from any location. Individuals who have moved away or who are unable to attend church services—even traveling church members and snowbirds—will find the option to give online especially accommodating because electronic giving can be done 24/7 and from anywhere in the world. The system enables donors to designate gifts to specific ministries and funds of their choice and to do so anonymously, if desired.

Short videos can be accessed within the application to guide members who need help with a particular task. A user guide, written specifically for members, is also available. The guide explains how to use the Online Giving application and provides simple instructions on how to set up an account and begin making contributions.
Advantages for Church Staff

Online Giving is a self-service, automated giving system that puts members in charge of managing their own contributions. Compared with traditional methods of giving, it is more cost effective for the church to use an online giving system. One of the main advantages for church staff is that they spend less time on administrative tasks—such as counting money, processing paper pledge forms, hunting down missing checks, and running to the bank to make deposits—and more time engaged in church ministries and stewardship activities. The system also simplifies record keeping. That is, contribution records are automatically kept in the giver’s online account and, after church staff exports them, they are stored permanently in the church’s secure database.

*Note*

Church staff does not need to manually record each contribution in the church’s database. With a few simple steps, church staff can export online giving records out of Online Giving and import them into the church’s secure database.

Finally, because members can log in to their own accounts and get contribution statements for their online giving, the number of end-of-year tax statements that staff must produce and then mail out to members is significantly reduced.

Advantages for Your Church

Electronic contributions are deposited directly into the church bank account, providing the church with predictable income that does not need to be counted, recorded, and then taken to the bank. The system is extremely flexible. It is easy to add a fund or gift request to the Online Giving system, making it easy to accommodate special appeals, fund drives, and mission collections. And, it is just as easy to deactivate a fund when its fundraising efforts end or update the information for a fund if plans for it change.

A singular advantage for the church is that the ease of online giving can result in an increase in donations. Statistics show that online giving is surpassing older, traditional methods of giving. When churches move to web-based online donations, they tend to attract more donors and experience an increase in giving.

System Requirements

Online Giving is available 24/7 and requires no special hardware or software. For church administrators and individual members who use the system, all that is needed is an Internet connection and a Web browser, such as Microsoft® Internet Explorer 7.0 (or later), Mozilla Firefox 3.0 (or later), Safari 3.0 (or later), or Google Chrome 2.0 (or later).

*CAUTION*

Cookies and JavaScript must be enabled on your PC, and popup blockers must be disabled. You should also turn off any system security programs or other programs that can block access (for example, Norton, McAfee, and the Google toolbar). Failure to do so can cause the application to not function correctly and can prevent you from using certain features. For instructions on enabling JavaScript, see Appendix D: “Enabling JavaScript”. For instructions on disabling popup blockers, see your browser’s Help.
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 your information you enter is encrypted. To verify that SSL is functioning, look for the padlock or key icon on your browser.

To ensure that no one gains unauthorized access to your account, the Online Giving website uses a time-out feature to log you off if you are inactive for a specific amount of time. This 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 help keep your information 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 anti-virus software that is updated on a regular basis.

**Contacting Us**

If you have questions about Online Giving or need support while using the application, use any of the following methods to contact us:

<table>
<thead>
<tr>
<th>ParishSOFT Church Management Solutions (CMS)</th>
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<tbody>
<tr>
<td><img src="contact.png" alt="Contact" /> <a href="http://www.parishsoft.com">www.parishsoft.com</a></td>
</tr>
<tr>
<td><img src="contact.png" alt="Contact" /> <a href="http://www.churchmanagementsolutions.com">www.churchmanagementsolutions.com</a></td>
</tr>
<tr>
<td><img src="contact.png" alt="Contact" /> <a href="mailto:support@parishsoft.com">support@parishsoft.com</a></td>
</tr>
<tr>
<td><img src="contact.png" alt="Contact" /> (734) 205-1000 (main)</td>
</tr>
<tr>
<td><img src="contact.png" alt="Contact" /> (866) 930-4774 (support)</td>
</tr>
<tr>
<td><img src="contact.png" alt="Contact" /> (734) 205-1011 (fax)</td>
</tr>
</tbody>
</table>

You can also find our contact information by selecting the **Contact Us** link on the Welcome page (see Figure 2-1).

**About This Guide**

This guide documents the administrative tasks involved with setting up and managing an Online Giving system for your church. As the administrator, one of the first tasks is to set up an account for yourself. You will then complete the basic system setup, which entails putting information about your church on the website, setting up the funds that members can give to, and specifying the payment methods your church accepts. After completing the basic setup, you will be ready to invite
church members to use the Online Giving system. To complete the setup process, the recommended approach is to read and follow the tasks outlined in Chapters 1-4 in the order given.

Undertake the tasks covered in the remaining chapters when the need arises. After you get the system up and running and givers are making contributions, you may need to consult Chapter 5, which shows you how to view payment information for both pending and processed Online Giving transactions. Chapter 6 describes the Online Giving export feature and steps you through the process of exporting contributions from Online Giving to other church management applications.

Online Giving provides a number of reports that you can use to manage your church’s online giving program. The reports include filters that let you create custom reports based on criteria you specify. Reports are described in Chapter 7.
The appendixes contain important supplemental information. In particular, Appendix B: “Online Giving Checklist” contains a checklist you can use as a guide to make sure that you do not inadvertently skip any steps in the process of setting up an Online Giving system for your church.

This guide is designed to help you get your Online Giving system up and running quickly. The guide uses step-by-step instructions, realistic examples, and illustrations to support your learning of the application.

**Video Help**

Your church’s Online Giving website is designed to be easy to use. If you have a question, a short instructional video may be available. If video help is available for a particular topic, this video link is displayed on the page:

![Watch Help Video!](image)

Simply click the link to view the video.
Chapter 2
Getting Started

Introduction

This chapter shows you how to access your Online Giving website and how to set up an administrator’s account. You will then complete the basic setup that entails providing information on your website about your church, setting up payment methods that your church accepts, and finally establishing the funds that will be available for your members to contribute to.

The information in this chapter assumes that you have signed and returned all agreements and completed the required paperwork. You should have received an email from ParishSOFT that email includes an attached letter that contains the URL for your website and your account registration number and key. We suggest that you have that letter handy because you will need the information to complete the tasks documented in this chapter.

For your convenience, we have also provided you with an Online Giving Checklist (see Appendix B: "Online Giving Checklist") to guide you through the process.

Connecting to Your Online Giving Web Site

Your Online Giving application is available from any web browser to users with valid login credentials. The website is secure so you can be certain that your information remains private.

To access the Online Giving application, complete the following:

1. Open a Web browser application.

   Note

   Online Giving supports the following Web browsers: Microsoft Internet Explorer 8.0 (or later), Mozilla Firefox 3.0 (or later), or Safari 3.0 (or later) and Google Chrome 2.0 (or later).

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

   http://myowningiving.com/default

   Note

   Your Online Giving provider will supply you with the URL (Internet address).
Your website opens to a Welcome page, which is similar to the one shown in Figure 2-1 for St. Patrick’s Parish (a demonstration website):

![Sample Welcome Window](image)

**Figure 2-1. Sample Welcome Window**

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

   - Firefox users: select **Bookmarks > Bookmark this Page**
   - Internet Explorer users: select **Favorites > Add to Favorites**.

   **TIP:** Ask your church’s webmaster to place a link to Online Giving on your church’s Home page so that members can easily connect to the site.

**Logging In**

In the Welcome window, log in under the **Existing User Login** section:

![User Login Section](image)

**Figure 2-2. User Login Section**
Do one of the following:

- If you already have a login, enter your **User ID** and **Password**. Then, click [Login]. The Home page is displayed (see Figure 2-4).

  For information about the Home page, see “Understanding the Home Page” on page 2-6.

- If you do not have a login, see “Creating an Account”, which follows for details.

### Creating an Account

*Note*

*The Welcome window has a link to a short video that walks you through the process of creating a new account. If you want to view the video help, click this link: [Watch Help Video].*

To create a new account for yourself or another administrator within your church, follow these steps:

1. On the Welcome page (Figure 2-1), click the **Create New Account** or **Sign up for a New Account** link.

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

![Figure 2-3. Creating a New User Account](image)
2. Complete the fields at the top of the form. See “Required Information for a New Account”, which follows, for descriptions of the fields.

3. At the bottom of the form, in the Enter the code as shown box, type the verification code that you see in the box to the left.

   Note

   The verification code helps to deter automated spam and enhance security against unauthorized account access. You are prompted to enter a verification code on any page in the application that requires you to supply personal information or change credit card or bank account information. After you enter the code correctly, the application allows you to continue.

   If you have difficulty reading the code shown, click the Show another code link. The application displays a new code for you.

4. When done, click **Submit**.

   After we validate the request, we will send the account holder an email. To complete the process, the account holder needs to follow the instructions in the email to log in to the church’s Online Giving website.

   Note

   To go to the Online Giving website, the account holder can click the link in the email or copy the entire URL and paste it into the Web browser’s address field.

**Required Information for a New Account**

Table 2-1 provides descriptions of the fields on the **New User Account Registration** window (shown in Figure 2-3). The asterisk (*) indicates required information.

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<th>Login Information</th>
<th>Required Information for a New Account</th>
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<tr>
<td><strong>User ID</strong></td>
<td>Required. Case Sensitive. Your User ID must contain no fewer than 6 and no more than 35 characters. You can use any combination of upper- and lowercase letters, any numbers, and any of the following special keyboard characters: the ampersand (&amp;), exclamation point (!), asterisk (*), the “at” (@) symbol, and the period (.). If you want, you can use your email address as your User ID, For example, <a href="mailto:dmiller@parishsoft.com">dmiller@parishsoft.com</a>.</td>
</tr>
<tr>
<td><strong>Password</strong></td>
<td>Required. Case Sensitive. Your password must contain no fewer than 8 and no more than 16 characters. You can use any combination of upper- and lowercase letters, any numbers, and any of the following special keyboard characters: the ampersand (&amp;), exclamation point (!), asterisk (*), the “at” (@) symbol, and the period (.).</td>
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Adding the Online Giving Email Address to Your Contacts List

We recommend that you add the Online Giving email address to your contacts list to prevent the junk email filter from deleting or automatically directing email from Online Giving to your junk or spam folder. The Online Giving email address is OG@parishsoft.com.

It is a good idea to check whether any Online Giving emails are already sitting in your junk or spam folder. If you find any, the process for getting them out of the folder is easy but depends on your email application. Follow the application’s Help instructions. In most applications, right-clicking the email message and then selecting an option to add the sender to the “safe list” removes the email from the junk folder and places it in your Inbox. Any future emails from the email address of the sender are then sent directly to your Inbox.
Understanding the Home Page

After you log in to your account, the Online Giving Home page for your church is displayed. The features on your Home page are identified in the following figure and described in more detail in the later sections of this guide.

**Figure 2-4. The Home Page**
Putting Your Church’s Information on Your Home Page

This section shows you how to enter information about your church exactly as you want it to appear on your website. This information includes the name of your church, the mailing address, and telephone number. The information that you supply is displayed on your church’s Home page.

You can also put your church logo or a banner on your church’s Home page. The logo or banner is located at the top of each page of a website. It should include the name of your church and fit the overall design of the website. The logo or banner should make a good first impression because it is one of the first things visitors see when they arrive at your church’s website. Requirements for the file that contains your church logo or banner file are given in Table 2-2.

You can return to this procedure at any time in the future to update your church’s information, should any of the details you initially provide change.

1. On the Home page, click the **Church Details** link:

   ![Church Details Window](image)

   The **Church Details** window (Figure 2-5) is displayed:

   - **If you have a church logo or web banner, select the file to put a church logo or banner on your church website.**
   - **Use the vertical scroll bar to view more content.**

   ![Church Details Window](image)

   **Figure 2-5. Church Details Window**

2. Enter information about your church in the fields in this window. See Table 2-2 for descriptions of the fields.

3. When done, click **SAVE** to publish the information to your website.
Fields in the Church Details Window

Table 2-2 describes the fields in the Church Details window. An asterisk (*) identifies required information. Use the vertical scroll bar to view all of the information in this window.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Church Name*</td>
<td>Required. The text you enter in this field is displayed in the banner at the top of every page on your website. This field is populated for you during the initial setup of your website.</td>
</tr>
<tr>
<td>Church Logo/Banner</td>
<td>Choose Logo or Banner. The logo is a graphic emblem that represents your church. If you choose the Logo option, the graphic you upload is displayed at the top of the web page to the right of the name that you specify for Church Name (see the previous entry in this table). The banner, on the other hand, is a header that extends across the width of the web page. If you choose the Banner option, the graphic you upload should include your church’s name because the name you specify for Church Name (see previous entry in this table) is not used. The banner replaces the Church Name and logo. The logo or banner file must be a .gif, .bmp, or .png file and be smaller than 0.5 MB. For best fit, the dimensions of the banner should be approximately 90 x 715 pixels. To place the logo or banner on your Home page, click Browse. Navigate to the location of the file on your computer and then select the file. Click Open. Click the Preview link to view the logo or banner before you save it. To remove the logo or banner from the website, click the Delete link. Click OK to confirm the deletion.</td>
</tr>
<tr>
<td>Church Email*</td>
<td>Required. Enter the full email address to be used by givers who want to make inquiries from your website.</td>
</tr>
<tr>
<td>Church Phone*</td>
<td>Provide the phone number for your church office. If your number includes an extension, type it in the extension field. The extension field accepts up to a seven-digit extension.</td>
</tr>
<tr>
<td>Managed Email Address*</td>
<td>Required. Enter the full email address for the individual who manages the accounts of givers who do not have Web access. The email address you supply is the email address that is used for all managed giver accounts. To supply the email address, click the Edit link. Supply a new email address. After you save the new email address, the Managed Email Address field is updated.</td>
</tr>
</tbody>
</table>
Creating a Welcome Message

All visitors to your Online Giving website see your Welcome page. We provide a default Welcome page for your website, but you should customize this page with a personal welcome message written especially for your church members.

1. On the Home page, click the Welcome Message link:

   ![Welcome Message window](image)

   The Welcome Message window (Figure 2-6) is displayed.

2. Type your church’s welcome message in the space provided.
The message is limited to 550 characters. You can use plain text or HTML coding.

**TIP: Consider using this space to thank members for participating in your church’s Online Giving program.**

![Figure 2-6. Welcome Message Window](image)

3. Click **SAVE** to publish the message to your site.

4. To preview your message, go to your Home page (Figure 2-4). Click the **Preview Site** link at the top of the page.

As shown in Figure 2-7, you can view the message that your church members will see:

![Figure 2-7. Previewing Your Site’s Welcome to Online Giving Message](image)
Providing Contact Information on Your Website

You can provide contact information for givers that appears on your church’s Contact Us page. Your members will see the text that you type when they visit your Online Giving website and click the Contact Us link.

Contact information is not required, but it is highly recommended that you provide such information as a convenience to your church members.

1. Select the Contact Us Page link:

2. On the Contact Us Page (Figure 2-8), type the information that you want to appear on your church’s Contact Us page.

   ![Manage Contact Us Window](image)

   **Figure 2-8. Manage Contact Us Window**

   Type your contact statement in the space provided.

3. Click **SAVE** to publish the information to your site.

4. To preview your message, go to your Home page (Figure 2-4). Click the Preview Site link at the top of the page. Then, click the Contact Us link.
The contact information that your church members will see is displayed:

Your Contact Us statement appears here.

Putting a Link to Online Giving on Your Church’s Website

To enable church members and staff to connect to Online Giving, you need to put a link to Online Giving on your church’s website. Use the URL (Internet address) that is included in the Online Giving Instruction email you received from ParishSOFT. This link enables church members and staff to connect to Online Giving directly from your church’s website.

Contact the person who is responsible for your church’s website, give the person the URL, and ask that the link to Online Giving be placed on your church’s website. If you are currently using ParishSOFT Web Solutions as your website, call ParishSOFT support for assistance. See “Contacting Us” on page 1-3 for the number to call.

Customizing the Content of the Email Templates

Online Giving automatically generates notification emails in response to key circumstances, such as when a giver’s credit card is due to expire or when a gift payment is received. The application includes an email template for each specific circumstance. You can easily edit the templates with your own text to create the right content for your givers. It is a good idea to create your text in advance so that, when the situation arises, email is ready to be sent.
Table 2-3 lists the templates whose content you can modify to fit your organization’s needs. To view the contents of these emails, see Appendix C.

Table 2-3: Email Templates

<table>
<thead>
<tr>
<th>Name of Template</th>
<th>Circumstance</th>
</tr>
</thead>
<tbody>
<tr>
<td>ProcessGiftsTo Suspend</td>
<td>Online gifts to a fund have been suspended</td>
</tr>
<tr>
<td>ProcessExpiringBankCards</td>
<td>A giver’s bank card is nearing its expiration date</td>
</tr>
<tr>
<td>ManagedEmailUser</td>
<td>A giver’s Online Giving account has changed so that the giver can now manage it independently</td>
</tr>
<tr>
<td>UpdateFundStatus</td>
<td>A deactivated church fund is no longer accepting donations</td>
</tr>
<tr>
<td>UpdateChurchStatus</td>
<td>The church has discontinued the Online Giving program</td>
</tr>
<tr>
<td>ProcessGifts</td>
<td>A giver’s payment has been received and is being processed</td>
</tr>
</tbody>
</table>

To customize the content of the email template:

1. On the Home page, select the **Church Emails** link:

![Church Emails](image)

   The Church Emails window (Figure 2-9) is displayed. The templates are listed in the left column:

   ![Church Emails Window](image)

   **Figure 2-9. Church Emails Window**
2. Click the link for template that you want to edit.

For example, to edit the template for the email that informs users that a received payment is being processed, click the **ProcessGifts** link.

The **Add New Email** window for **ProcessGifts** (Figure 2-10) is displayed:

![Figure 2-10. Add New Email Window](image)

3. Type the text of your email message in the **Added Message** box.

4. Click **Submit** to save the message.

   The system stores the message and then automatically sends the email to users when the situation arises.

**Logging Out of Your 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 2-1) is displayed.

2. Close your browser. To do this, click **X**.

**Recovering Forgotten Login Credentials**

If you or a church member cannot remember your User ID or password, follow the instructions under “Helping a Giver Recover Forgotten Login Credentials” on page 4-3.
Introduction

This chapter shows you how to create and manage your organization's funds for Online Giving. You will also learn how to set up payment methods to process donor gifts to your funds. This chapter also shows you how to delete a fund and how to make changes to it, including how to change its name or description and how to change its access from public to private.

Understanding the Life Cycle of a Fund

As an administrator, it is important to understand the life cycle of an Online Giving fund because where a particular fund is in that cycle determines how you manage the fund. In general, an Online Giving fund goes through four main phases:

- Creation
- Active Giving (public)
- Active Giving (private)
- Exit

Creation Phase

The Creation phase is the shortest phase in the fund's life cycle. With planning and forethought, it can take less than a half hour to create a fund. In the Creation phase, you add the fund to your Online Giving system, give it a descriptive name, and set it up to receive and process gifts from donors.

We recommend that when you create a fund, you leave its status set to Active (the default) but change the view to Private. This approach enables you to get the new fund set up correctly while keeping your work hidden (private) from givers. If the fund has managed givers, after setting it up you can still make donations and manage their giving even though the fund is private. Keep the fund view set to Private until you are ready go live and publicly launch the fund.

For instructions on adding a fund, see “Adding a New Fund” on page 3-4.

Active Giving Phase (Public)

The Active Giving or public phase begins on the specified start date. The fund goes live and is publicly available. Givers have immediate visibility and accessibility to the fund. During this phase, the fund accepts gifts in accordance with the payment settings and methods specified in the setup. If you have managed givers, administrators can continue to put in and manage their gifts to the fund. This phase is characterized by public interest in the fund. Donors remain actively involved in supporting it with recurring gifts, contributions, and various types of pledges.

For instructions on making a fund public, see “Changing the View of a Fund” on page 3-14.
Giving Phase (Private)

At some point in a public fund’s life cycle, you may determine that you no longer want it visible for donors to create new gifts. The fund may be aging and experiencing a decline in donor contributions. It may be part of a closing campaign or simply no longer needed.

While the application enables you to delete a fund, we strongly recommend against deleting a fund that has experienced any type of activity. In fact, the system does not allow you to delete a fund that has any active or inactive gifts allocated to it. If the fund is becoming obsolete, we recommend that you remove it from public access as a first step toward total retirement.

The View option in the software enables you to remove a fund from public view by simply changing the setting from public to private. After the fund is made private, givers can no longer see it on the donor site, which prevents the fund from receiving future contributions. The fund continues to process active gifts and payments against pledges, and if it has managed givers, the fund administrator can still privately put in managed gifts.

For instructions on making a fund private, see “Changing the View of a Fund” on page 3-14.

Exit Phase

The exit phase is the final phase in a fund’s life cycle. Either the fund’s financial goals have been achieved, or donor commitment to the fund has declined so that it is no longer financially viable. This phase is typically entered into some time during year after the fund is made private to allow existing gifts to run out.

At this point, you are ready to take action to retire the fund and allow existing gifts to the fund to run out. Once again, we do not recommend deleting a fund. The software provides a feature that enables you to inactivate the fund. After a fund is made inactive, all activity ceases immediately, and the fund can no longer accept gifts and payments even from managed givers. The fund quietly runs out of gifts and expires.

The decision to inactivate a fund should not be made lightly. Active contributions to the fund are no longer processed. If you decide later to activate the fund, it takes significant time and effort to restore any active gifts associated with it.

For instructions on making a fund inactive, see “Changing the Status of a Fund” on page 3-13.
Displaying Your Church’s Online Giving Funds

The Manage Church Funds page lists all of the funds in your Online Giving system. To display this page, click the Funds link on the Home page:

![Funds](image)

The Manage Church Funds page (Figure 3-1) is displayed, for example:

![Manage Church Funds](image)

Note

If this is the first time you are using the Online Giving application, you will see no funds on the page.

![Figure 3-1. Manage Church Funds Page](image)

You can perform a variety of tasks (see the referenced pages for details):

- Add a fund (see page 3-4).
- Change display order of funds on the giver site (see page 3-11).
- Edit the information for a fund (see page 3-11).
- Change a fund’s status (see page 3-13).
- Change the view from public to private (see page 3-14)
- Sort the list of funds (see page 3-15).
- Delete a fund (see page 3-15).
Adding a New Fund

Note

Before adding a fund, we recommend that you read the information under “Understanding the Life Cycle of a Fund” on page 3-1.

1. At the top of the Manage Church Funds page, click Add New Fund link.

The Add New Fund window is displayed:

![Add New Fund Window](image)

Figure 3-2. Adding a New Fund

See Table 3-1 for descriptions of the fields in the Add New Fund window. An asterisk (*) indicates required information.

2. Leave the fund’s status set to Active.

3. Set the View option for the fund. This option controls who can see the fund.

Notes

If you want the fund to be immediately viewable by all givers, leave the View option set to Public.

We recommend that you change the View option to Private even for a fund that you intend to make public. When you are ready to publicly launch the fund, you can edit the fund and change the option to Public. If you want the fund to remain private, which means that only administrators can see and access the fund, change the setting to Private.

The Private setting is available only if your organization requested that the Managed Givers functionality be turned on, thereby enabling you to register managed givers.
4. Enter the **Fund Name** and **Fund #** (optional).

5. If desired, set up the fund to enable pledge and contribution data to be imported into ConnectNow Offering. To enable the import, do the following:
   a. In the **ConnectNow Imports** field, select **Enable Import for ConnectNow Offering** checkbox.
   b. Supply the fund ID in the **ConnectNow Offering Fund ID** field.

6. In the **Description** field, type a description.

   **Note**

   *The text you provide for the Description is seen by givers when they view the list of available funds. Givers see this icon next to the name of the fund:* 📄. *If the giver places the mouse pointer over the icon, the text of your description is displayed.*

7. Set the **Date Range** (optional).

8. Select the **Gift Types** associated with the fund.

9. Specify whether or not the fund accepts down payments.
   - By default, the **Down Payment** checkbox is selected to allow the fund to accept down payments.
   - To prevent the fund from accepting down payments, select (to uncheck) the box.

   **Note**

   *If you prevent the fund from accepting down payments, the Down Payment option is not available to givers when they set up new gifts to the fund.*

10. Specify whether or not the fund accepts OBO (on behalf of) contributions. Do one of the following:
    - If the fund does not accept OBO contributions, select (to uncheck) the **On Behalf Of** box.
    - If the fund accepts OBO contributions, complete these steps:
      a. Leave the **On Behalf Of** box checked.
b. Select **Allow** to permit givers to make OBO contributions or **Require** to require OBO contributions only.

   **Note**
   
   *If you select the **Require** option, givers do not see an OBO option when they give a new gift. They do see the default OBO text or custom text you supply (see Step c).*
   
   c. If you want to supply your own OBO text description, check the **Custom OBO Text** box and then type your description. If you want to use the default OBO text, leave the **Custom OBO Text** box unchecked. Your givers will see this text for this fund when they give a new gift.

11. Specify whether or not contributions made to the fund are tax deductible.

12. Specify whether or not the fund accepts anonymous gifts.

   **Note**
   
   *Be aware that disabling the Anonymous Gifts checkbox applies to new gifts only. For existing gifts given anonymously, the system continues to preserve the giver’s anonymity.*

   Fund setup is complete.

13. Do one of the following:

   - Click ![Submit](submit.png) to add the fund.
     
     The fund you added is now displayed in the **Manage Church Funds** window.
     
   - Click ![Cancel](cancel.png) to exit the window without saving changes.
Fund Information Fields

Table 3-1 describes the fields in the Add a New Fund window. Required fields are identified by an asterisk (*).

Table 3-1: Fund Information Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td><strong>Active</strong>: defaults to Active for new funds. Active funds are available to church members who use your Online Giving website. <strong>Inactive</strong>: an inactive fund remains in your system but is not available for member contributions from your website. Change this setting to Inactive, if needed, during new fund setup. After a fund is added, its status can be changed to Active.</td>
</tr>
<tr>
<td><strong>View</strong></td>
<td><strong>Public</strong>: defaults to Public for new funds. Public funds can be seen by all church members who use your Online Giving website. <strong>Private</strong>: a private fund does not appear in the list of “Give a Gift” funds; therefore, it cannot be seen by givers. Only administrators can view a private fund and select it to enter contributions from managed givers. Private funds can be used for a variety purposes, including payments” for special events, such as auctions, and early gifts to special campaigns that are not announced to the public.</td>
</tr>
<tr>
<td><strong>Fund Name</strong></td>
<td>Required. Enter the fund name as used in your chart of accounts.</td>
</tr>
<tr>
<td><strong>Fund #</strong></td>
<td>Optional. If you export contributions, the Fund # may be required by the application you are exporting to. See Chapter 6 for details.</td>
</tr>
<tr>
<td>ConnectNow Imports</td>
<td>Two controls enable the system to import pledges and contributions in the fund into ConnectNow Offering.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> Click the document link on the Export Contributions page to find out where the Fund ID is located in ConnectNow Offering and learn how to insert it into this field. To see the link, first select ConnectNow Offering in the field under Begin Export.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Enable Import for ConnectNow Offering</strong> Activates the import feature to allow the system to import a file containing pledges and contributions into ConnectNow Offering.</td>
</tr>
<tr>
<td></td>
<td>• <strong>ConnectNow Offering Fund ID</strong> Contains the ID of the fund as defined in the ConnectNow Offering system. The system uses the ID in this field to match the fund in the Online Giving system with its counterpart in the ConnectNow Offering system.</td>
</tr>
</tbody>
</table>
Description

Required. Supply a description of the fund. The description is displayed next to the name of the fund on your Online Giving website.

Date Range

Use this field to schedule a time period during which contributions are accepted. The starting date is the date when the fund is available to church members using your site. If you set an end date, the status of the fund changes to “Inactive” on that date, and the fund can no longer receive contributions.

Clear Range

Clears the time period specified for Date Range.

Gift Types

Required. The gift types you select determine whether members have the option to set up a recurring contribution (regular offering), a pledge, or a one-time gift. You can require a pledge and specify a pledge goal. For any fund, you can select more than one Gift Type option:

Following are descriptions of the Gift Type options:

- **Recurring** (regular offering)
  Members can set up recurring electronic contributions to the selected fund. Members specify the amount, payment frequency (administered by your church), starting date, and payment account.

- **Pledge**
  Members can set up their own pledge amount and payment schedule to the selected fund. Members specify the amount, payment frequency (administered by your church), starting date, down payment, and payment account for both the scheduled pledge payments and the down payment—multiple payment accounts are permitted.

  If the fund the Pledge Required option selected, Pledge is the only Gift Type option available to givers.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Required. Supply a description of the fund. The description is displayed next to the name of the fund on your Online Giving website.</td>
</tr>
<tr>
<td>Date Range</td>
<td>Use this field to schedule a time period during which contributions are accepted. The starting date is the date when the fund is available to church members using your site. If you set an end date, the status of the fund changes to “Inactive” on that date, and the fund can no longer receive contributions.</td>
</tr>
<tr>
<td>Clear Range</td>
<td>Clears the time period specified for Date Range.</td>
</tr>
<tr>
<td>Gift Types</td>
<td>Required. The gift types you select determine whether members have the option to set up a recurring contribution (regular offering), a pledge, or a one-time gift. You can require a pledge and specify a pledge goal. For any fund, you can select more than one Gift Type option:</td>
</tr>
</tbody>
</table>

Following are descriptions of the Gift Type options:

- **Recurring** (regular offering)
  Members can set up recurring electronic contributions to the selected fund. Members specify the amount, payment frequency (administered by your church), starting date, and payment account.

- **Pledge**
  Members can set up their own pledge amount and payment schedule to the selected fund. Members specify the amount, payment frequency (administered by your church), starting date, down payment, and payment account for both the scheduled pledge payments and the down payment—multiple payment accounts are permitted.

  If the fund the Pledge Required option selected, Pledge is the only Gift Type option available to givers.
### Gift Types (continued)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>One Time</td>
<td>Members can schedule a one-time electronic contribution from the payment account of their choice to the selected fund. They can also specify the payment date for a gift. The One Time gift option also provides a <strong>Special Instructions</strong> field where members can write a note to accompany a gift. For example, a member might include a special note if the gift is in memory of someone, for a second collection, or for payment of a special fee.</td>
</tr>
<tr>
<td>Quick Give</td>
<td>Givers can make a quick, one-time contribution to the fund without having to create a user account to make a donation. They simply click the <strong>Quick Give</strong> link on your church’s Home page and follow the steps to contribute to the fund of their choice. Note that this option is only available if you have the <strong>Quick Give</strong> feature enabled for your church’s website (see “Setting Up Payment Methods and Contribution Frequencies” on page 3-16 for details).</td>
</tr>
<tr>
<td>Pledge Required</td>
<td>This field cannot be selected unless the <strong>Pledge</strong> box is checked. If the <strong>Pledge Required</strong> box is checked, the <strong>Regular Offering</strong> and <strong>One Time</strong> gift options are not available for members setting up Online Giving contributions to the selected fund. Members are required to set up a pledge for their Online Giving to this fund.</td>
</tr>
<tr>
<td>Pledge Goal</td>
<td>Set the dollar amount of your pledge goal in this field. Members do not see the pledge goal during setup of their Online Giving.</td>
</tr>
<tr>
<td>Down Payment</td>
<td>By default, the <strong>Down Payment</strong> checkbox is selected to allow givers to submit down payments for gifts to the fund. To prevent the fund from accepting down payments, select (to uncheck) the checkbox. <strong>Note</strong> If you prevent the fund from accepting down payments, the <strong>Down Payment</strong> option is not available to givers when they set up new gifts to the fund.</td>
</tr>
</tbody>
</table>
**Table 3-1: Fund Information Fields (Continued)**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>On Behalf Of</strong></td>
<td>Specify whether or not the fund accepts OBO (on behalf of) contributions.</td>
</tr>
<tr>
<td></td>
<td>• If the fund does not accept OBO contributions, select (to uncheck) the On Behalf Of box.</td>
</tr>
<tr>
<td></td>
<td>• If the fund accepts OBO contributions, leave the On Behalf Of box checked. Select one of the following options from the drop-down list:</td>
</tr>
<tr>
<td></td>
<td>o <strong>Allow</strong>: lets givers make OBO contributions to the fund, if they want to.</td>
</tr>
<tr>
<td></td>
<td>o <strong>Require</strong> requires OBO contributions only.</td>
</tr>
<tr>
<td></td>
<td><em>Note</em></td>
</tr>
<tr>
<td></td>
<td><em>If you select the Require option, givers do not see an OBO option when they give a new gift. They do see the default OBO text or, if you supply it, custom OBO text.</em></td>
</tr>
<tr>
<td><strong>Custom OBO Text</strong></td>
<td>If you want to supply your own OBO text description, check the Custom OBO Text box and then type your description in the field.</td>
</tr>
<tr>
<td></td>
<td>If you want to use the default OBO text, leave the Custom OBO Text box unchecked.</td>
</tr>
<tr>
<td></td>
<td>Your givers will see the custom or default OBO text for this fund when they give a new gift to the fund.</td>
</tr>
<tr>
<td><strong>Tax Details</strong></td>
<td>By default, the Tax Details checkbox is selected to specify that contributions to the fund are tax deductible.</td>
</tr>
<tr>
<td></td>
<td>If contributions to the fund are not tax deductible, select (to uncheck) the Tax Details checkbox.</td>
</tr>
<tr>
<td><strong>Anonymous Gifts</strong></td>
<td>By default, the Anonymous Gifts checkbox is selected to allow givers to make anonymous contributions to the fund. When givers set up a gift, the Remain Anonymous checkbox is visible in the New Gift setup.</td>
</tr>
<tr>
<td></td>
<td>To prevent the fund from accepting anonymous contributions, select (to uncheck) the Anonymous Gifts checkbox. When givers set up a gift, the Remain Anonymous checkbox is not visible in the New Gift setup.</td>
</tr>
<tr>
<td></td>
<td><em>Note</em></td>
</tr>
<tr>
<td></td>
<td><em>Be aware that de-selecting the Anonymous Gifts checkbox applies to new gifts only. For existing gifts given anonymously, the system continues to preserve the giver’s anonymity.</em></td>
</tr>
</tbody>
</table>
Changing the Display Order of Funds on the Giver Site

On the giver site, givers select the funds they want to contribute to on the Give a New Gift page.

You can modify the order in which funds appear to givers on this page by completing the following:

1. Click the Funds link:

   ![Funds Link]

   The Manage Church Funds page Figure 3-1 is displayed.

2. Click the Manage Fund Display Order link to open the Manage Fund Display Order window (Figure 3-3 to view a list of your organization’s funds. For example:

   ![Manage Fund Display Order Window]

   Figure 3-3. Manage Fund Display Order Window

   The list order matches the order in which the funds are currently shown on the donor site. Reordering the list changes the order in which funds appear to your donors.
3. To change the order, position your mouse on the name of the fund that you want to move. A double-arrow cursor appears to let you know that the fund is selected:

4. Drag the selected fund up or down the list. When the fund is in the desired position in the list, release the mouse button.

5. Repeat Step 4 until the funds are in the desired order.

6. Click **SAVE** to save your changes.

   The order in which givers see the funds on the **Give a New Gift** page now matches your list.
Editing the Information for a Fund

To edit the information for a fund, complete the following steps.

1. Click the **Funds** link.

2. Click the name of the fund.

   The fund’s details are displayed. For a description of the fields, see Table 3-1 on page 3-7.

3. Edit the fund details as necessary.

4. Click to save and publish the changes to your Online Giving website.

   Each fund details window displays its history, including the date and time the fund was added and the date and time when the fund details were last updated.

Changing the Status of a Fund

This procedure shows you how to change a fund’s status from active to inactive, or vice versa. We recommend that you first read “Exit Phase” on page 3-2 to understand the effect of inactivating a fund.

⚠️ CAUTION

Setting a fund’s status to inactive cancels all active giving to the fund. Active contributions to the fund are no longer processed and cannot be restored if the fund is later activated.

1. On the **Manage Church Funds** page (Figure 3-1), select **Active** or **Inactive** from the **Fund Status** list:

   You are prompted to confirm the change.
2. Do one of the following:

- Click to change the fund’s status. If you are changing the status to inactive, leave the Yes box checked if you want to send an email automatic notification to members to inform them that the fund is no longer accepting gifts.

  Note

You can still export data from a fund that is set to “inactive”. See Chapter 6 for information on exporting contribution data.

- Click to exit without changing the status of the fund.

Changing the View of a Fund

This procedure shows you how to change the view of a fund from public to private, or vice versa.

- If a fund’s view is set to Public, all givers can see it and create gifts for the fund.
- If a fund’s view is set to Private, givers cannot see the fund listed on the donor site, which prevents the fund from receiving future contributions. The fund can process active gifts and payments against pledges, and if it has managed givers, the fund administrator can privately put in managed gifts.

1. On the Manage Church Funds page (Figure 3-1), select Public or Private for the Fund View setting:

   ![Fund View Menu]

   You are prompted to confirm the change.

2. Click to save the change or to exit without saving the change.
Managing Funds and Payment Options

Sorting the List of Funds

On the Manage Church Funds page, you can sort the list of funds by any column heading in the list view, such as the creation date or fund name. Simply click the desired column heading to sort the list by it. A directional arrow appears on the heading to identify the column selected and the direction of the sort (ascending or descending):

Click a column header to sort the funds list on the column’s data. The arrow indicates the direction of the sort as ascending or descending.

To switch between ascending and descending sort order, click the column heading.

Deleting a Fund

If you mistakenly create a fund or set one up incorrectly, you can quickly and easily remedy the mistake by deleting it from the system. The procedure below shows you how.

However, if the fund you want to delete has current or historical transaction activity, be aware of the following:

- You cannot delete a fund if there are current gifts or pledges associated with it.
- You cannot delete a fund if the fund has any inactive or suspended gifts allocated to it.

We recommend against deleting a fund that has experienced any type of activity. If the fund is no longer being used or if you want to retire it from use, consider these options, which are better alternatives:

Note

*These options are referenced under “Understanding the Life Cycle of a Fund” on page 3-1. To help you determine which option is best, we recommend that you re-read that section.*

- Change the fund’s status to inactive. See “Changing the Status of a Fund” on page 3-13.
- Make the fund private. See “Changing the View of a Fund” on page 3-14.
- Move the fund to the bottom of the Funds list. See “Changing the Display Order of Funds on the Giver Site” on page 3-11.
If, after careful consideration, you still need to delete a fund, follow these steps:

1. On the Manage Church Funds page (Figure 3-1), click the Delete link for the fund.
   
   You are prompted to confirm that you want to delete the fund.

2. Click OK to confirm.

   The system checks to verify that the fund can be deleted.

   - If the fund can be deleted, the system removes it. The fund no longer appears in any lists.
   - If the fund cannot be deleted, the system displays a message to inform you that the fund is being used.

3. Click OK.

### Setting Up Payment Methods and Contribution Frequencies

This section shows you how to set up payment methods and contribution frequencies for your members and how to discontinue a payment method that you are currently using. Your church can choose to accept payments from a member's bank account, a credit card, or both.

If your church chooses to accept the American Express or Discover card, you assume responsibility for verifying that your Merchant account is set up correctly with American Express and/or Discover. If your church is not cleared to process transactions for American Express and/or Discover cards, member transactions will fail, and your church may be charged fees. A warning is displayed to inform you that you should verify that your account is set up to accept such transactions:
Specifying Accepted Payment Methods and Contribution Frequencies

1. On the Home page, click the **Payment Settings** link:

   ![Payment Settings Link](image)

   The **Payment Settings** window (Figure 3-4) is displayed.

   ![Payment Settings Window](image)

   See Table 3-1 for descriptions of the fields in the **Payment Settings** window. An asterisk (*) indicates required information. Note that any dimmed or shaded options cannot be selected. These options are already in use in member accounts and cannot be changed to prevent disruption of Online Giving transactions for your church and members.

2. By default, all payment methods are selected. De-select the checkboxes for the payment methods your church does not accept.

   When your givers log in and choose a method of payment for their gifts, they see only the payment options you selected.

   If your church accepts credit cards, givers see only the icons for the credit cards the church allows them to use. Therefore, if you select the **Credit Cards** (Visa/MasterCard) checkbox, members see the Visa and MasterCard icons, shown in the following illustration, and know that your church accepts these cards:

   ![Accepted Cards](image)
If you select **Accept Discover Card** and/or **Accept American Express**, givers see the Discover and American Express icons, shown in the following illustration, and know that your church accepts those cards as payment methods for gifts.

3. Select the **Contribution Frequencies** that you want to offer your members.

   *Note*

   *Give considerable thought to your Contribution Frequencies selection. You cannot de-select a contribution frequency after it is selected by a giver.*

Members see only the **Contribution Frequency** options that you select when they give a gift or view their active Online Giving.

The following illustration shows you the relationship between what you specify as a contribution frequency and what givers see when they give a new gift or view their active online giving. In this illustration, two **Frequency** options, **Monthly** and **Yearly**, are available for selection because they are selected in the **Payment Settings** setup as contribution frequencies for the gift.

As shown in the **Frequency** list, the only **Frequency** options your givers can select when they give a gift are the ones you specify for **Contribution Details**.
Managing Funds and Payment Options
Setting Up Payment Methods and Contribution Frequencies

3

4. Under **Accepted Days for Giving**, do the following:

- For one-time, weekly, and biweekly gifts, you can select specific days on which giving can occur. Leave all boxes de-selected if you want to enable giving on all days of the week.

- For monthly, biannual, quarterly, and yearly gifts, you can select specific days of the month when your church accepts gifts to all of its funds. Leave all boxes de-selected if you want to enable giving on all days of the month.

For example, if your church accepts gifts only on the 2nd and 20th of each month, check the 2 and 20 boxes, as shown in the following illustration:

![Figure 3-5. Acceptable Days for Giving](image)

5. Scroll down to the **Other Payment Settings** group, and disable or enable each of the options in the group:

- **Enable Quick Give**
  By default, this option is selected, which means the Quick Give feature is available for all of your church funds set up to use the feature.
A link appears on your church’s Home page, as shown in Figure 3-7.

De-select the checkbox to prevent quick giving. The Quick Give feature is disabled for all funds. The Quick Give section shown in Figure 3-7 is not visible to visitors to your church’s website.

- **Enable Three Dollar Offset**
  
  By default, this option is selected to allow givers who pay by credit card can give an extra gift of $3.00 to all funds to offset credit card fees. De-select the checkbox to disable the feature.

- **Require Donor ID**
  
  By default, the Require Donor ID checkbox is not selected so givers are not required to enter a donor ID when they register for a new account. To require givers to supply their donor ID when setting up a new account, select the checkbox.

  **Note**

  Organizations use different terms to identify givers (for example, “envelope number” or “Diocesan ID”). By default, the application uses the term “Donor ID” as the text label on all donor ID fields. If desired, you can change the text label to match the term your organization uses to refer to the donor ID. For instructions, see “Customizing the Text Label on the Donor ID Field” on page 3-26.
The following illustration shows the effect requiring the donor ID has on the New User Account Registration form:

Selecting the Require Donor ID checkbox in the Payment Settings setup makes the Donor ID a required field (*) in the New User Account Registration form.

- **Enable Minimum Gift Amount**

  This option enables you to specify a minimum gift amount the fund accepts. By default, the Enable Minimum Gift Amount is selected to enforce a $3.00 minimum gift requirement for all funds. If desired, remove or change the default selection.

6. If you enabled the Quick Give option in Step 5, to complete the setup, you need to specify exactly which church funds accept Quick Give contributions:

   - If you add a new fund, you can specify Quick Give as a gift type when you set up the fund. See “Adding a New Fund” on page 3-4.
   - If you want to add Quick Give as a gift type option for already existing funds, you need to edit the fund (see “Editing the Information for a Fund” on page 3-13). Select the Quick Give option as a gift type for each fund that can accept this type of donation.

7. Click **Save** to publish the changes to your Online Giving website.
Payment Setting Fields

Table 3-2 describes the fields in the Payment Settings window. Required fields are identified by an asterisk (*).

Note

Any dimmed or shaded options cannot be selected. These options are already in use in member accounts and cannot be changed to prevent disruption of Online Giving transactions for your church and members.

Table 3-2: Payment Setting Fields

<table>
<thead>
<tr>
<th>Payment Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted Payment Methods (*)</td>
<td>Select at least one payment method.</td>
</tr>
<tr>
<td></td>
<td>Bank Accounts (EFT), Credit Cards (Visa and MasterCard), Discover Card, and American Express are selected by default. If a payment method is disabled, it means it is not available as a choice. If a payment method is checked and disabled, it means an active gift is using the payment method so you cannot change it.</td>
</tr>
<tr>
<td></td>
<td>De-select the payment methods that your church does not accept.</td>
</tr>
<tr>
<td>Accepted Contribution Frequencies (*)</td>
<td>Select at least one contribution frequency. Options include: Weekly, Monthly, Bi-Annually (twice a year), Yearly, and Quarterly.</td>
</tr>
<tr>
<td></td>
<td>If a frequency option is disabled, it means that an active gift is using the frequency type so you cannot change it.</td>
</tr>
<tr>
<td></td>
<td>Give careful thought to the frequency options you select. You cannot de-select a contribution frequency after it is selected and being used by a giver.</td>
</tr>
</tbody>
</table>
### Table 3-2: Payment Setting Fields (Continued)

<table>
<thead>
<tr>
<th>Payment Setting</th>
<th>Description</th>
</tr>
</thead>
</table>
| Accepted Days for Giving | **Days of Week Options**  
For one-time, weekly, and biweekly gifts, you can select specific days of the week that your church allows giving to occur.  
By default, all day-of-the-week check boxes are deselected, which means that giving is accepted on all days of the week.  
- Either leave all checkboxes deselected to enable giving on any day of the week.  
  OR  
- Select only the checkboxes for days of the week that your church allows giving. |
|                          | **Days of Month Options**  
For monthly, bi-annual (twice-a-year), quarterly, and yearly gifts, you can designate specific days of the month that your church allows giving to occur.  
By default, all day-of-the-month check boxes are deselected, which means that giving is accepted on all days of the month.  
- Either leave all checkboxes deselected to enable giving on any day of the month.  
  OR  
- Select only the checkboxes for days of the month that your church allows giving.  
  For example, if your church accepts gifts only on the 2nd and 20th of each month, select the 2 and 20 checkboxes. |
### Table 3-2: Payment Setting Fields (Continued)

<table>
<thead>
<tr>
<th>Payment Setting</th>
<th>Description</th>
</tr>
</thead>
</table>
| Other Payment Settings   | • Enable Quick Give  
Quick Give is a feature that enables visitors to your site to contribute without having to set up an account. The process is simple and straightforward. A visitor simply clicks the Quick Give link on your church’s Home page and follows a few simple steps to contribute to the fund of his or her choice. The gift is processed immediately, and like other online contributions, a confirmation email is sent to the giver to acknowledge its receipt.  

By default, the Enable Quick Give checkbox is selected, which means quick giving is allowed for all funds set up to accept the special Quick Give method of contributing. To prevent quick giving, de-select the checkbox.  

• Enable Three-Dollar Offset  
By default, the checkbox is selected to allow givers who pay by credit card can give an extra gift of $3.00 to all funds to offset credit card fees.  

If your church does not allow givers to give an extra gift of $3.00 to offset credit card fees, de-select the checkbox to disable the feature.  

• Require Donor ID  
The donor ID provides a method to help your organization to keep track of individual giver’s contributions to funds so if you want collect this type of information, consider making the donor ID a requirement.  

By default, the checkbox is not selected so the system does not require registering givers to supply a donor ID when they register for a new account.  

If you want to make supplying the donor ID a requirement, select the checkbox. All new givers, including those applying for a Quick Gift, Managed Gifts, and regular gift accounts, will be required to supply their donor ID in the designated field on the respective registration forms. |
Managing Funds and Payment Options
Setting Up Payment Methods and Contribution Frequencies

Discontinuing a Payment Method
To discontinue a payment method (for example, a credit card) that is currently being used, complete the following:

1. Click the **Payments Settings** link to open the Payment Settings window (Table 3-4 on page 3-17).
2. De-select the checkbox to the left of the payment method you no longer want to use.

For example, to discontinue credit cards as a payment, click (to clear) the **Credit Cards** option:

A message is displayed to let you know the number of givers currently using the payment method you selected and the names of the funds affected.

You are prompted to confirm your decision.

---

**Table 3-2: Payment Setting Fields (Continued)**

<table>
<thead>
<tr>
<th>Payment Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Other Payment Settings (continued)</strong></td>
<td>• Enable Minimum Gift Amount</td>
</tr>
<tr>
<td></td>
<td>This option enables you to specify a minimum gift amount the fund accepts. By default, the checkbox is selected to enforce a $3.00 minimum gift requirement for all funds. If desired, you can change the default selection in one of two ways:</td>
</tr>
<tr>
<td></td>
<td>o Remove the minimum gift amount requirement to enable givers to give any amount to the fund. To do this, de-select the checkbox.</td>
</tr>
<tr>
<td></td>
<td>o Increase the minimum gift amount requirement to $5.00 or $10.00 by selecting the desired amount from the dropdown list.</td>
</tr>
<tr>
<td></td>
<td>If you specify a minimum amount, all gifts to the fund must meet or exceed the amount you set (for example, $3.00 or more). If the gift amount does not meet the selected minimum dollar amount, the giver is prompted to enter a gift amount greater than or equal to the set minimum.</td>
</tr>
</tbody>
</table>

---
3. Do one of the following:

- Click **CONTINUE**. Then click **SAVE** to confirm the change.

  All information pertaining to the discontinued payment method (for example, the giver’s credit card account number) is removed from the database. In addition, an email is automatically sent to notify givers who are currently using the payment method that all giving made using this method is suspended. In that email, they are instructed to change their payment method.

- Click **CANCEL** to exit without saving changes.

### Customizing the Text Label on the Donor ID Field

Organizations use different terms to identify givers (for example, “envelope number” or “Diocesan ID). By default, the application uses “Donor ID” as the label on all fields where the giver’s ID is referenced. If desired, you can change this label to match the term your organization uses to refer to the donor ID.

To change the text label on all fields referencing the donor ID, complete the following:

1. On the Home page, click the **Payment Settings** link to open the **Payment Settings** window (Figure on page 3-17).

2. Scroll down to the **Other Payment Settings** group.

3. Select the **Donor ID** link (third option).

   The **Donor ID** window opens, as shown in Figure 3-8:

   ![Figure 3-8. Donor ID Window](image)

4. In the **Donor ID** text field, type the desired text label for the donor ID field. The field accepts up to 20 alphanumeric characters.

5. Click **SAVE**.

   The text label you created now appears throughout the application wherever the donor ID or envelope number is referenced (for example, on the New User Registration Account and Quick Give registration forms and in the Individual Giver Report).
Promoting Your Online Giving Website

After you add your church’s information and establish your funds and payment methods, your website is ready for members to use. You need to inform your members of your website’s availability and encourage them to use it. Your Online Giving provider offers these free materials to help you launch a successful Online Giving program:

- Online Giving Welcome Video
- Online Giving Marketing Kit.

Online Giving Welcome Video

The Online Giving Welcome Video, entitled Online Giving: A Brief Overview for Members, explains the many advantages of using Online Giving and provides high-level instructions for creating a personal account, setting up a payment method and payment frequency, and paying for a contribution.

You might consider playing the video during your Online Giving information sessions or as part of your announcement of the program. You can also add a link to the video from your church’s website—ideally from the same page as your Online Giving link.

You can find the Online Giving: A Brief Overview for Church Members video on our YouTube channel at: http://www.youtube.com/parishsoft#p/a/u/0/E0qMjL6LFH4. Click the Videos link.

Note

To view the video in a separate browser window, copy the link. Then, open a new browser window and paste the link into the address field.

Online Giving Marketing Kit

As part of services, we also offer the Online Giving Marketing Kit. This kit contains ready-to-use materials, including announcements, reusable offertory cards, and promotional ideas, to help your staff promote Online Giving to your church. You can download the kit from http://www.parishsoft.com/support/Documentation/marketing-kit.doc and use and edit the materials as you like. Alternatively, you can purchase posters and other printed materials directly from Our Sunday Visitor by calling 800-348-2130.

Informing Members About Your Website

To get your members started, we suggest you email them a short announcement about the Online Giving service. In your email, include a link or the address to the site that members can copy and paste into their browser’s address line.

Instruct members to begin the online giving process by clicking the Create New Account link on the Welcome page (Figure 2-1 on page 2-2).

The site is intuitive and user friendly, so members can navigate around it easily to set up their own personal giving. Let your members know about the Welcome Video and about the User Guide, which is available for download (printable PDF) from the website. The guide explains how to use the Online Giving application and provides simple instructions on how to set up an account and begin making contributions.
Chapter 4
Assisting and Managing Givers

Introduction
As the administrator, you may be called upon to assist members with various tasks, such as helping them set up an Online Giving account or recover a forgotten password or user ID. Some of your church members may even want you to set up and manage their online giving. This chapter covers some of the common tasks you may be expected to perform for givers.

Assisting Your Givers
This section contains step-by-step instructions for common tasks online givers often seek administrative help to perform. The instructions and illustrations walk you through the process from the giver’s point of view so you can provide faster support because you are viewing exactly what the giver sees.

You can also refer your givers to the Online Giving User Guide for Donors. The following tasks and procedures are also documented in that guide, which is written especially for members.

Preventing Online Giving Emails from Going to the Junk or Spam Folder
If a giver is not receiving email notices from Online Giving, it may be because these emails messages are being directed to a junk or spam folder.

A giver should add the Online Giving email address to his or her contacts list to prevent the junk email filter from deleting or automatically directing Online Giving emails to the junk or spam folder. The Online Giving email address is OG@parishsoft.com.

Ask your giver to check the junk or spam folder to see if any Online Giving emails are already sitting there. If any are found, the procedure for removal is simple but varies depending on which email application the giver is using. In most applications, right-clicking the email message and then selecting an option to add the sender to the “safe list” removes the email from the junk folder and places it in the Inbox. Any future emails from the email address of the sender are then sent directly to the giver’s Inbox.
Helping a Giver Set Up an Online Giving Account

Givers use the same interface as you do to set up an Online Giving account. You can refer to the following procedure if you need to assist them with this task.

**Note**

This procedure is also documented in the Online Giving User Guide for Donors. Each member should have a copy of this guide, which is available from the member's Home page under the About Online Giving link.

1. On the Welcome page, select the Create New Account link or select the Sign up for a New Account link:

   ![Create New Account](image1)

   The New User Account Registration page is displayed:

   ![New User Account Registration](image2)
2. Complete the information required on the **New User Account Registration** page.

   You can find descriptions and specific security requirements for the **User ID** and **Password** fields under “Required Information for a New Account” on page 2-4.

   **Note**

   *If a giver contributes online to more than one church that uses Online Giving, he or she can use the same email address for each church.*

   Note that church members using your site cannot enter information in the **Registration Code** field. This field is for use by church administrators only.

3. At the bottom of the form, in the **Enter the code as shown** box, type the verification code that you see in the box to the left.

   **Note**

   *The verification code helps to deter automated spam and enhances security against unauthorized account access. You are prompted to enter a verification code on any page in the application that requires you to supply personal information or change credit card or bank account information. After you enter the code correctly, the application allows you to continue. If you have difficulty reading the code shown, click the Show another code link. The application displays a new code for you.*

4. When done, click **Submit**.

   After we validate the request, we will send the account holder an email typically within 15–20 minutes.

   To complete the process, the account holder needs to follow the instructions in the email to log in to the church’s Online Giving website.

### Helping a Giver Recover Forgotten Login Credentials

The information in this section shows you how to recover a forgotten user ID and password for a giver’s account. You can also use this procedure if you forget your own login credentials.

**Forgotten User ID**

If you or a church member cannot remember the User ID, do the following:

1. In the **Login** section on the Welcome page (Figure 2-1 on page 2-2), select the **Forgot User ID?** link.
The **Forgot your User ID?** window is displayed:

![Forgot your User ID? Window](image)

**Figure 4-1. Forgot your User ID? Window**

2. Type the complete email address in both fields, and then click **Submit**.

After we validate the request, we will send a reminder email containing 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.

**Forgotten Password**

If you or a church member cannot remember the password, do the following:

1. In the Login section on the Welcome page (Figure 2-1), click the **Forgot Password?** link.

   The **Forgot your Password?** window (Figure 4-2) is displayed:

   ![Forgot your Password? Window](image)

   **Figure 4-2. Forgot Your Password? Window**

2. Type the complete email address in both fields, and then click **Submit**.

   After we validate the request, we will send a reminder containing a reset password link 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.

3. Click the link in the email to obtain instructions for resetting the password.
Helping a Giver Add a New Gift

Use the following directions to help a giver add a new gift.

Note

To help you schedule gift payments with more precision and to enable the system to process gifts on days with larger volumes of online donations, we set the daily cutoff time to 7:00 PM Eastern Time. Gifts submitted before 7:00 PM ET are processed on the same business day. Gifts submitted after 7:00 PM ET are processed on the next business day.

1. On the Welcome page, enter your User ID and password in the Existing User Login section.

Your Home page is displayed.

2. Click Give a New Gift:

The church funds available for giving are displayed, as shown in Figure 4-3. 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 4-3. Funds Available for Gift Giving](image)
3. 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 (for example, 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.

   After you make your selection, detailed text entry fields pertaining to the gift type are displayed.

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

   - If you selected **Recurring**:
     
     a. Specify the payment amount, payment frequency (for example, **Monthly**). In the **starting on** field, click , and then from the calendar select the date when you want to start making payments.

     b. Select the account to charge (the accounts you set up in Step 1 as payment methods are listed for selection 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. In the **starting on** field, click , and then from the calendar select the date when you want to start making 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**).
c. If you want to make a down payment, 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.

- If you selected One Time:

a. Specify the payment amount. In the starting on field, click the , and then from the calendar select the date when you want to make the payment.

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:

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.
5. 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.

  Note

  After you click SUBMIT, the button is deactivated until your gift is processed.

- 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 start date you selected. On that date, the money is transferred from the account you specified and deposited directly into the 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.

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

Helping a Giver Make a “Quick Give” Contribution

The “quick give” method does not require you to register for a user account. The process of making a contribution takes just minutes to complete. To use this process, you first need to complete a short personal information form. Then, you can specify a contribution amount, indicate your payment method, and submit your contribution.

  Note

  The Quick Give method is available only if the church’s Online Giving site enables (turns on) the “quick give” feature. The following procedure assumes that the feature is enabled.

Complete the following:

1. In the Quick Give section, located bottom-right corner of the Welcome page, click the here link.
The Welcome to Quick Give! page is displayed:

2. Read the Welcome to Quick Give! introduction.

3. Do one of the following:

- If you want to create an Online Giving account, click the Create Account link in the lower-left. Then, exit this procedure and complete the process for creating an account. Instructions for helping a giver create an account are under “Helping a Giver Set Up an Online Giving Account” on page 4-2.

  OR

- If you want to make a one-time “quick give” donation, click the Continue Quick Give link in the lower-right.

The personal and gift information form is displayed, as shown in the following illustration:
4. Enter your personal and address information in the first two sections of the form.

   **Notes**
   - All fields marked with an asterisk (*) indicate required information.
   - The personal information and financial details that you enter on this form are protected and remain secure. The system does not retain any of this information.

5. In the **Gift Information** section, do the following:

   **Note**
   An asterisk (*) indicates required information.

   a. Select the fund.

   b. Enter the dollar amount of your contribution.

   c. Select a payment method (Credit Card or Bank Account). Then, click the **Add** link and supply account details. When done, click **Submit** to save the information and return to the personal and gift information form.

   **Note**
   Note that when you return to the form, the **Add** link is gone. In its place is the **Unlock** link. If you need to change your payment method or payment method details, click the **Unlock** link. The **Unlock** link then changes to the **Edit** link. Select a new payment method or click the **Edit** link to make changes to your payment method details. When done, click **Submit** to save the information and return to the form.

   d. (optional) If you are using a credit card and want to help offset the fee incurred by the church, check the box to add a $3.00 gift to your contribution.

   e. If the fund allows giving on behalf of (OBO), check the box and select the organization that you want to give the gift on behalf of.

   f. (optional) If you want to include a note or special instructions regarding the use of your donation, type your text in the **Special Instructions** box.
6. At the bottom of the form, in the **Enter the code as shown** box, type the verification code that you see in the box to the left.

   **Note**

   *The verification code helps to deter automated spam and enhances security against unauthorized account access. You are prompted to enter a verification code on any page in the application that requires you to supply personal information or change credit card or bank account information. After you enter the code correctly, the application allows you to continue.*

   *If you have difficulty reading the code shown, click the **Show another code link**. The application displays a new code for you.*

7. Click **NEXT**.

   The **Confirmation** window is displayed.

8. Review your personal and payment information to make sure that it is accurate. Then, do one of the following:

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

     **Note**

     *After you click **SUBMIT**, the button is deactivated until your gift is processed.*

   - If certain information is not correct, click **BACK**, make the necessary changes, and then click **NEXT** to return to the **Confirmation** window. Click **SUBMIT** to submit your contribution.

   The transaction is processed immediately. A receipt is displayed to inform you that your gift was processed. A copy of the receipt is also sent to the email address you provided in your personal information.
Helping a Giver Change (Edit) 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.

Changing a Payment Amount, Frequency, Credit Card Type, or Payment Date

1. On the Home page, click the My Active Online Giving link:

The My Active Online Giving page (Figure 4-4) is displayed:

![Figure 4-4. My Active Online Giving Page]

Active status means that payments are being processed.

SUSPENDED status means that recurring payments are temporarily stopped.

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

Detailed information for the gift is displayed, as shown the following illustration:

![Figure 4-5. Editing a Gift]
The details you see 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 your 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 4-5, 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.

4. Click **Submit** to save the change.

**Temporarily Stopping (Suspending) 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. On the Home page, select My Active Online Giving:

   ![My Active Online Giving](image)

   The **My Active Online Giving** page (Figure 4-4) is displayed.

2. Click **Edit** for the gift you want to suspend.

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

4. Click **Submit**.

   The **My Active Online Giving** page (Figure 4-4) is re-displayed. If the payments for the gift are stopped temporarily, in the **Status** column for the gift you see the following: **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. On the Home page, select **My Active Online Giving**:

   ![My Active Online Giving](image)

   The **My Active Online Giving** page (Figure 4-4) is displayed.

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

3. Uncheck the **Suspend** box.

4. Select your **Next Payment Date**. To do this, click **.** From the calendar, select the date when you want to resume making payments for the gift.

   **Note**

   *You cannot make up past donations for suspended gifts.*

5. Click **Submit**.

   The **My Active Online Giving** page (Figure 4-4) is re-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 date shown in the **Next Gift Date column**.

Canceling 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. On the Home page, select **My Active Online Giving**:

   ![My Active Online Giving](image)

   The **My Active Online Giving** page (Figure 4-4) is displayed.

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 canceling the gift.

### Helping a Giver Change or Delete a Payment Method

Use this method to help a giver update a credit card, add a new card, or delete a card that he or she no longer wants to use.

### 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 progress. Only future scheduled payments are discontinued after you make the change.

1. On your Home page, select **My Payment Methods**:

   ![](image)

   The Manage My Payment Methods page is displayed:

   ![](image)

   **Figure 4-6. Manage My Payment Methods Page**
2. Under Edit Card, select the Edit link and then update the account information as needed.

Note
If a giver has a question about what information to enter in a field, refer them to the descriptions in the “Credit Card Account Fields” table in Online Giving User Guide for Donors.

3. Click 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 prompts you to designate another account for payment of those gifts. If you need to suspend or cancel a gift, see “Temporarily Stopping (Suspending) Payments for a Gift” on page 4-13 or “Canceling an Active Gift” on page 4-14 for details.

1. On your Home page, click My Payment Methods:

![My Payment Methods](image)

The Manage My Payment Methods page (Figure 4-6) is displayed.

2. In the Edit Card column, select the Delete link.
A message is displayed asking you to confirm the deletion.

3. Do one of the following:

- If you have no gifts using the account, click to confirm the deletion or click 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. You have a couple of options:
  - If you want to choose a different payment method, check the Yes box and then select one of your other payment methods. Then, click 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 to delete the payment method. Contributions to your gifts are immediately suspended. No further gift payments are made until you choose a new payment method.

The application returns you to the Manage My Payments page (Figure 4-6).
Helping a Giver Reinstate a Payment Method for a Failed Transaction

If a transaction fails due to the rejection of a payment method, the giver receives an email notifying him or her of the specific payment method that caused the failure along with the reason for the failure. The email also lists any active gifts that were suspended as a result of the failure. The email includes a link that directs the giver to the Web site where he or she can update the payment method and reactivate giving to those suspended gifts.

To reinstate a payment method and resume giving to suspended gifts, instruct the giver to do the following:

1. As directed in the email, click the link to update the payment method.
   The Welcome page on your church’s Online Giving Web site is displayed.

2. Log in to your account.
   The Manage My Payment Methods page is displayed. For example:

   ![Manage My Payment Methods Page: Payment Method Error]

   Figure 4-7. Manage My Payment Methods Page: Payment Method Error

3. Do one of the following:

   • Update the details for the payment method that caused the transaction failure. To do this:
     a. Click the Edit link and then change the details for the payment method.

   Note

   An incorrect credit card or bank account number can cause a transaction failure. So, be sure to check the account number for the payment method and change it if it is incorrect. You must enter the full account number because the Online Giving system does not store this information.
b. In the **Enter the code as shown** box, type the verification code that you see in the box to the left.

   **Note**

   *If you have difficulty reading the code shown, click the Show another code link. The application displays a new code for you.*

c. Click Submit.

   The **Reactivate Gifts** window (Figure 4-8) opens. You are prompted to reactivate the gifts that were suspended due to the failed payment method.

![Reactivate Gifts Window Lists Suspended Gifts](image)

   **Figure 4-8. Reactivate Gifts Window Lists Suspended Gifts**

d. For each suspended gift that you want to reactivate, complete these steps:

   1) In the **Reactivate** column, check the box to the left of the gift.

   2) From the **Payment Method** list, select the payment method that you want to use.

   3) From the **Next Payment Date** list, select the date on which you want to resume making payments.

   4) Click **Save Reactivated Gifts**.

   You return to the **Manage My Payment Methods** page. Your payment method is now updated with the new information you provided.
• Delete the payment method. To do this:
  a. Click the **Delete** link.
     
     You are prompted to confirm the deletion.
  b. If you are currently using the payment method to pay for a gift, you can choose a different payment method by checking the **Yes** box and selecting a different payment method from the list. Alternatively, you can leave the **Yes** box unchecked to cancel the gift.
  c. Click to delete the payment method.

• Add a new payment method and then transfer the gift to the new payment method. To do this:
  a. Click the **Add New Credit Card** link or the **Add New Bank Account** link.
  b. Enter the details for the payment method.
  c. In the **Enter the code as shown** box, type the verification code that you see in the box to the left.

    **Note**

    *If you have difficulty reading the code shown, click the **Show another code** link. The application displays a new code for you.*

  d. Click .

    The new payment method is added to your list of payment methods.
  e. Transfer the suspended gifts to the new payment method. To do this:

    1) From the **Manage My Account** menu, select **My Active Online Giving** to display your gifts.

    2) Click **Gift Details** to display the **Gift Details** window.

    3) From the **Account** list, select the new payment method.

    4) Click **Submit** to save.
Helping a Giver Update an Expiring Credit Card

When a giver’s credit card approaches the expiration date, the application automatically sends an email to notify the giver so that the card can be updated or the payment method changed before the card expires. If the card expires, gift payments are suspended, resulting in an interruption in giving.

*Note*

An automatic email reminder is sent three months, two months, and one month prior to the credit card’s expiration date.

The email also includes a link that directs the giver to a page on the Online Giving Web site where the payment method can be updated or changed.

The following instructions show you how to help a giver update an expiring credit card. If the giver wants to change the payment method

1. As directed in the email, click the link to update the payment method.
   
   You are directed to the Welcome page on your church’s Online Giving Web site.

2. Log in to your account.

   The **Manage My Payment Methods** page (Figure 4-9) is displayed:

   ![Manage My Payment Methods](image)

   **Figure 4-9. Manage My Payment Methods: Expiring Credit Card**

   Yellow highlighting indicates that the payment method is expiring soon.
3. To update the details for the card that is expiring:
   a. Click the **Edit** link.
      
      The **Edit** window is displayed. For example:

      ![Edit AMEX window]

      b. Change the details for the payment method.

      *Note*
      
      *You must enter the full account number in the Card Number field because the Online Giving system does not store this information.*

   c. In the **Enter the code as shown** box, type the verification code that you see in the box to the left.

      *Note*
      
      *If you have difficulty reading the code shown, click the **Show another code** link. The application displays a new code for you.*

   d. Click **Submit** to save the information.
Viewing Your Church’s Online Giver Records

From time to time, you may need to find out if a particular church member is participating in your Online Giving program. Or, you may need to find an individual’s email address or telephone number so that you can contact a giver. This section shows you how to display the records of all of the givers in your Online Giving system so that you can quickly find the information you need.

To view the records of your Online Giving members, select the Givers link:

A list of your givers (Figure 4-10) is displayed:

Figure 4-10. Givers List
About the Givers Page

The Givers page displays all of your donor records. By default, 50 records are displayed per page. To change the number of records displayed, select an option (10, 25, 50, 100, 250, or 500) from the Display box. To page through the list, select the page number links in the bottom left.

The Givers page has clickable sort columns to enable you to sort the list based on information in a specific column. For example, you can click the Last Name header to sort the list alphabetically by last name or click the Env# header to sort by envelope number. The arrow in the heading indicates the column you are sorting on and the direction (ascending ▲ or descending ▼) of the sort.

On the Givers page, you can perform these tasks:

- Quickly locate the name of a specific giver. For details, see “Finding a Giver” on page 4-24.
- View and edit a giver’s member number or envelope number. To edit either number, type the correct number in the Member# or Env# field, and then select the Ver (verified) checkbox.

  Note
  
  The Env# field accepts up to 15 characters.

  If you export contributions to another application, the envelope or member number (Env#) may be required. See Chapter 6 for details.

- In the Type column, view the type of account owned by the giver:
  - A = church administrator.
  - I = independent giver (a giver who creates, sets up, and manages his or her own Online Giving account).
  - M = managed giver (a giver whose Online Giving account is created, set up, and managed by a church administrator).
  - Q = quick giver (a giver who uses the “quick give” process to make a one-time gift or donation to specific funds set up by the church. This type of giver does not have an Online Giving account. In addition, the Quick Give feature must be enabled by the church to allow funds to accept this method of giving).

- Log into a managed giver’s account. To do this, click (managed giver icon).

  Note

  Clicking opens a login window for the selected managed giver’s account. Your current session remains open. If you want to end your current session, log out.

- Convert a managed giver to an independent giver. To do this, click .

- View a giver’s email address and other contact information. In the Details column, click .

- View the giver’s individual detail report. To do this, click .
Finding a Giver

To quickly find a giver:

1. Click the Find a Giver link on the Givers page (Figure 4-10) to display the giver search filters:

   ![Find a Giver Form](image)

   You can search by envelope number, first and last name, address, and telephone number.

2. Type your search criteria in one or more of the search fields.

3. Click Find to begin your search.

   The application does one of the following:
   
   • If it finds a giver who matches your search criteria, the giver's information is displayed.
   • If it cannot find a giver who matches your search criteria, it displays this message: You do not have any Online Givers.

4. Click the Cancel link to return to the main Givers page.

Creating a Managed Giver Account

If you have members without Web access or members who prefer to have the church manage their electronic giving, you can set up their Online Giving account and manage their contributions and pledges for them. These types of members are called “managed givers”.

The process of creating a managed giver account consists of three steps, which should be followed in the order given:

1. (Giver) Fill out a Payment Authorization Form.

2. (Administrator) Create a managed giver account.

3. (Administrator) Select gifts and specify how they will be paid for.

   The remainder of this section provides detailed procedures for each step.
**Step 1: Ask Giver to Fill Out a Payment Authorization Form**

Ask the giver to complete a form that authorizes you to act on their behalf to set up and manage their contributions. The form should also list the funds the giver wants to contribute to, contribution amounts, and payment methods. Appendix A provides a sample *Payment Authorization Form* that you can use as-is or as a guide if you want to create your own form. Be sure to keep a copy of the signed form on file and provide a copy to the giver.

**Step 2: Set Up an Account**

After you have a completed payment authorization form, you can set up an account for the giver. This procedure shows you how.

1. On the Home page, select the **Register New Giver** link:

![Register New Giver](image)

   The **Managed User Account Registration** page (Figure 4-11) is displayed:

   ![Managed User Account Registration](image)

   **Figure 4-11. Registration Form for a Managed Giver Account**

2. Complete all of the required fields on the registration form.

   **Note**

   *Descriptions of the fields on this form and security requirements are provided on page 2-4.*

   The email address shown in the Email Address field is the address that is stored in your church profile (see “Fields in the Church Details Window” on page 2-8). This email address is the same for all of your managed givers.
3. If necessary, click the **Edit** link to specify a different email address.

   The Online Giving system will send any email communications regarding this account to the email address you supply in this field.

   ✧ **TIP:** *Because these accounts will be managed within your church, consider using the same email address for all of your church's managed giver accounts.*

   You can set up a unique email address (for example, managedgivers@demochurch.com) that you will use only for the Online Giving accounts that your church manages. By using a separate email address, you can keep these types of communications separate from those directed to your church’s main email address.

4. Click **Submit** to create an account.

   A message is displayed to let you know that the account is created.

   You can now log in to the account. Under **What would you like to do Next?**, select the **Givers** link.

5. Click **Givers** and then **OK** to log into the giver's account.

   You have full access to the giver’s account. You can give gifts and manage other aspects of the account on the giver’s behalf. Go to Step 3.

### Step 3: Set Up a Payment Method

If the giver completed a form similar to the Payment Authorization Form (see the sample form in Appendix A), do the following:

1. Log in to your account.

2. Click the **Givers** link.

3. On the **Givers** page, click **Givers** and then **OK** to log into the member’s account.

   ✧ **Note**

   *See “Step 2: Set Up an Account” on page 4-25 if you have not yet created an account for the managed giver.*
4. On the giver's Home page, click the **My Payment Methods** button:

![My Payment Methods](image)

The **Manage My Payment Methods** page is displayed. For example:

![Manage My Payment Methods](image)

5. In section to the right, select the **Add New Bank Account** link or the **Add New Credit Card** link.

6. Provide the member's account information.

7. In the **Enter the code as shown** box, type the verification code that you see in the box to the left.

   **Note**

   *If you have difficulty reading the code shown, click the Show another code link. The application displays a new code for you*

8. Click **Submit** to save the information.

   You return to the **Manage My Payment Methods** page. The payment method is listed on the **My Credit Cards** (if you set up a credit card as a payment method) or the **My Bank Accounts** (if you set up a bank account) tab.

   You are now ready to set up gifts on behalf of the giver.
**Step 4: Set Up One or More Gifts**

1. On the Manage My Payment Methods page, in the section to the right, under My Online Giving, select the Give a New Gift link.

2. Select one or more gifts. To do this:
   a. Select Gift Type option for the desired fund.
   
   ![Select one or More Gifts Below](image)

   b. Specify the amount, payment frequency, start date, and account to charge.
   
   c. If you want to remain anonymous, check the Remain Anonymous box.
   
   d. If you want to give the gift on behalf of an organization, select the organization from the list.

3. Click NEXT.

4. In the Confirm My Gifts window, review the details for the donation to make sure everything is correct.

![Confirm My Gifts](image)
5. Click **Submit**.

   **Note**

   *After you click **Submit**, the button remains inactive until your gift is processed.*

   A confirmation message is displayed to let you know that the gift has been processed. The details of your donation are also displayed for you to review.

6. If desired, click **Print** to print or click **Finish** to exit.

   The managed giver account is now set up. The system will send a confirmation to the email address in the member’s account profile.

**Converting a Managed Giver to an Independent Giver**

If a giver decides to assume responsibility for managing his or her own Online Giving account, you can convert the account from a managed giver to an independent giver. Complete the following:

1. On the Home page, select the Givers link:

   ![Givers](image)

   Your church’s list of givers (Figure 4-10 on page 4-22) is displayed:

2. Find the giver whose account you are converting. Then, click this icon in the **Details** column: **Details**.
The **Convert Managed User to Independent** window (Figure 4-12) is displayed:

![Convert Managed User to Independent Window](image)

**Figure 4-12. Convert Managed User to Independent Window**

3. Enter and confirm the giver’s email address. Then, click **Submit**.

A confirmation email is sent to the email address you entered. After the giver confirms the change, management of the account is transferred to the giver.
Chapter 5
Viewing Online Giving Transactions

Introduction
Transactions entered into the Online Giving system are automatically processed and settled each
day at 10 p.m. Eastern time. Any donations received after this time are processed on the next
business day.

CAUTION
Do not use Sage Virtual Terminal to manually enter Online Giving transactions. Trans-
actions processed with Sage Virtual Terminal create conflicts with the Online Giving
application that cause batches to fail settlement.

At any time, you can view Online Giving transactions that are in the system waiting to be processed
(“open batches”) or that have already been processed (“settled batches”). This chapter shows you
how to view these types of transactions.

Viewing Unprocessed Transactions (Open Batches)
To view transactions that are waiting to be processed, do the following:
From the Home page, click the View Current Open Batch link:

The View Current Open Batch page (Figure: 5-1) is displayed:

```
<table>
<thead>
<tr>
<th>Amount</th>
<th>Type</th>
<th>Date</th>
<th>Reference</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>$200.00</td>
<td>Visa</td>
<td>22/02/2011</td>
<td>B2KEM0C2Z2D</td>
<td>View</td>
</tr>
<tr>
<td>$500.00</td>
<td>Visa</td>
<td>22/02/2011</td>
<td>B2KEM0C2Z0</td>
<td>View</td>
</tr>
<tr>
<td>$50.00</td>
<td>Discover</td>
<td>22/02/2011</td>
<td>B2KEM0C3E20</td>
<td>View</td>
</tr>
<tr>
<td>$20.00</td>
<td>MasterCard</td>
<td>22/02/2011</td>
<td>B2KEM0C2Z2D</td>
<td>View</td>
</tr>
<tr>
<td>$500.00</td>
<td>Visa</td>
<td>22/02/2011</td>
<td>B2KEM0C2Z0</td>
<td>View</td>
</tr>
</tbody>
</table>
```

Figure 5-1. View Current Open Batch Page
This page shows details (the amount, type, date, and a reference number) for each transaction to be
processed.
Online Giving
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This page has clickable column headers that you can use to sort the information. To sort on a specific column, click its header. A directional arrow appears on the column header to identify the column selected for the sort and the direction of the sort (ascending ▲ or descending ▼). For example, suppose you want to view the most recent transactions. To do this, click the Date header. Click the Date header again to re-sort the list and view older transactions.

Use the page number links at the bottom of the page to move through entire list of open batches.

The Current Open Batch Summary section on the right displays the net amount, the number of transactions to be processed, the number of credit card transactions, and the number of checking/savings account transactions. To view detailed information for a batch, click the View link.

**Viewing Processed Transactions (Settled Batches)**

Your Online Giving system automatically creates batches for checks and credit cards. After transactions with a batch are processed, the batch becomes “settled.” At any time, you can view the details of settled batches from your Online Giving Home page.

1. On the Home page, click the View Settled Batch History link:

   ![View Settled Batch History](image)

   The View Settled Batch History page (Figure: 5-2) is displayed:

   ![View Settled Batch History Page](image)

   The system displays batches that have been settled within the past seven days.
2. To select a different date range, click the calendar icons, select the dates, and then click the link Filter Batches.

The main list view shows the detail of each batch of transactions processed during the selected date range, including Net Amount, number of Transactions, Type, Settle Date, and Reference number for each batch. To view detailed information for a settled batch, click the View link.

To sort this list, click any column header. Use the page number links at the bottom of the page to move through the list.

The Filtered Settled Batch Summary on the right displays the Net Amount and number of settled Transactions in the batches processed during the selected date range.

Card Batches shows the number of batches the system created to process and settle credit card transactions. Check Batches shows the number of batches the system created to process and settle checking/savings account transactions.
Chapter 6
Exporting Contributions

Introduction
You can export contributions from Online Giving to the following church management applications:

- ParishSOFT
- ConnectNow Offering
- Church Management Solutions
- Parish Data System
- ACS Technologies
- Logos
- PDMS-Hartford
- Servant Keeper
- Shelby System

Accessing the Export Instructions
Each application has its own instructions for exporting contributions. To view the instructions:

1. On the Home page (Figure 2-4), click the Export Contributions link:

   ![Export Contributions](image)

   The Export Church Contributions page (Figure 6-1) is displayed:

   ![Export Church Contributions Page](image)

   1. Select the target church management application
   2. Click the link to the selected application’s export instructions

   Figure 6-1. Export Church Contributions Page

2. As shown in Figure 6-1, select the church management application.
3. By default, the Include Quick Gifts box is checked (see Figure 6-1) so that “quick gift” contributions are automatically included from the export file. To exclude “quick gifts” from the file, uncheck the Include Quick Gifts box.

4. Click the link to the instructions.

A web browser opens and displays the instructions.

5. Follow the instructions to complete the export.

Note

Most applications have prerequisites for exporting contribution files. The information in the next section addresses data preparation requirements.

Before You Export

Each application has different requirements for exporting data, but most require that the data be properly prepared and in a usable format. For example, you may need to make sure that each giver has a verified envelope or member number and that each fund has a unique number (Fund # or Account #). The data file itself may need to be in .csv (comma-separated value) format. The following sections show you how to satisfy these conditions if they are required by the application to which you are exporting contributions.

Verifying Envelope Numbers or Member Numbers

To view givers’ envelope or member numbers, click the Givers link on your Online Giving website’s Home page. Use this link to manage and verify (“lock”) your givers’ envelope or member numbers. After the number is marked as verified, the giver cannot change it. When you repeat this process for subsequent exports, only the “non-verified” envelope or member numbers will require verification.

1. From your main Online Giving menu, click the Givers link:

My Church’s Online Giver List is displayed (see Figure 4-10 on page 4-22). The envelope number or member number for each giver is shown Env# column.

2. For each giver listed, do one of the following:

Note

You do not have to assign a unique envelope number to each giver. You can use the same envelope number multiple times. The ability to assign duplicate envelope numbers makes it easier for those givers who want to make anonymous contributions to church funds.

- If the envelope or member number (Env#) is correct, select (to check) the Ver (verified) box.
- If the envelope or member number (Env #) is not correct, type the correct number in the Env# box and then check the Ver (verified) box.
3. Click \[SAVE\].

4. Repeat steps 2–3 until all givers are marked “Verified.” (Use the page number links at the bottom of the page to page through the entire list of givers.)

**Assigning a Fund Number**

If the application you are exporting contributions to requires that each fund have an ID number, use this procedure to assign each fund a number.

1. Display Home page, and then click the **Funds** link:

   ![Funds Link](image)

   The **Manage Church Funds** page (Figure 3-1) is displayed.

2. Select the desired fund name to display its details (Figure 6-2).

3. To assign the fund a number, enter the desired number in the **Fund #** field:

   ![Fund Details Window](image)

   **Figure 6-2. Fund Details Window**

4. Click \[SUBMIT\] to assign the fund number and close the window.
Exporting Contributions Data into CSV Format

This procedure shows you how to export contributions from the Online Giving system to comma separated values (.csv) format. You can then import the .csv file into the target contribution application.

1. On the Home page, click the Export Contributions link:

   The Export Church Contributions page (Figure 6-3) is displayed:

   ![Export Contributions Page](image)

   **Figure 6-3. Export Contributions Page**

2. Verify that all givers have an envelope number by clicking the Click here to enter and verify envelope numbers for your Givers link.

   **Note**

   *The application prevents you from exporting contributions if givers are missing envelope numbers.*

3. Select one or more individual funds from the list or click the Select all Funds link.

   **Note**

   *If a fund is inactive, you can still export data from the fund.*

4. Under Select Date Range, click . Select a date on the calendar to set a date range for the export.
5. From the **Begin Export** list box, select the church management application that you want to export your contributions data files to. Figure 6-4 shows you the list of available applications:

![Figure 6-4. Exporting Contributions to Other Applications](image)

6. Do one of the following:

   - Leave the **Only export contributions not yet exported** box checked (the default).
     
     This option should remain checked for most exports as a safeguard to prevent inadvertent duplicate postings in your church management application.

   - If you want to include contributions that have previously been exported in your .csv file, uncheck the box. This action is appropriate if you exported a .csv file but the file was never imported into your church management application.

7. If you want to include “quick give” contributions in the export file, check the **Include Quick Gifts** box.

   **Note**

   Your selection is saved and “remembered” by the application so that the next time you navigate to the Export Church Contributions page, the option is pre-selected as the default.

8. Click **Begin Export**.

9. To download your exported .csv file, click this link: [Export File Successfully Created. Click here to Download](#).

10. When prompted, select **Save** to save the .csv file in the desired location on your computer.
Chapter 7
Creating Reports

Introduction
Your Online Giving website includes a number of reports that you can create for any date range you specify. This chapter describes the types of reports you can create and shows you how to customize a report to meet your needs.

Creating Reports
To create a report, complete the following:

1. On the Home page (see Figure 2-4 on page 2-6), click the Reports link:

   ![Reports](image)
   View Reports and Statistics on the Giving activity within your Church.

   The Online Giving Reports page (Figure 7-1) is displayed:

   ![Online Giving Reports Page](image)

   Figure 7-1. Online Giving Reports Page
2. From the Select Report list, select the report you want to create.

3. Select Group sorting and Detail sorting options for the report.

   Note

   The options that you can select vary based on the type of report you select.

4. Customize the report by selecting a filter option: Fund or Gift Type.

   Notes

   • To select all funds or gift types, click the Select all link.
   • To select a single fund, select it from the list.
   • To select more than one fund, press and hold the Shift or Ctrl key while you select each fund with the mouse. After you select all of the funds you want to include in the report, release the mouse button.

5. To set a date range for the report, in the Date Range section enter a date in the each box or click and then select a “from” and “to” date from the calendar.

6. Click Click Here to View Report.

   The report is displayed in the Report Viewer. The following reports are available. For detailed descriptions, go to the pages indicated.

   • ACH Rejection/Correction (page 7-17)
   • Budget (page 7-4)
   • Credit Card Expiration (page 7-5)
   • Detail User (page 7-6)
   • Failed Transaction (page 7-7)
   • Forecasting (page 7-7)
   • Givers’ Name and Email (page 7-7)
   • Giving By Gift Type (page 7-8)
   • Giving Detail By Fund (page 7-9)
   • Giving Detail (page 7-10)
   • Individual Giver Detail (page 7-10)
   • OBO Giving Detail (page 8-5)
   • OBO Pledge (page 8-4)
   • Open Batch Detail (page 7-12)
   • Open Pledge (page 7-12)
The Report Viewer

After you click on the report, the selected report is displayed in the Report Viewer. The top of the viewer contains a toolbar (see Figure 7-2) with command buttons that enable you to search, print, save or export any Online Giving reports.

Note

You can export reports in the following formats: pdf, xls, rtf, mht, text, csv and image.

The toolbar buttons are described in Figure 7-2. To view the function of a button, position your mouse on the button to display its tooltip.

![Figure 7-2. Report Viewer Toolbar](image)

To view all of the information in a report, click and drag the vertical scroll bar on the right and the horizontal scroll bar at the bottom of the Report Viewer.

Report Descriptions

The Online Giving reports you can create are described in the following sections.
**ACH Rejection/Correction**

This report contains information about all the bank account (EFT) transactions that when processed at Sage contained a correction error or rejection by the bank. A correction error consists of some type of mistake, such as an incorrect account number, but the payment is still processed. A rejection indicates that the bank denied the payment. In this situation, the payment is reversed. Both a correction and a rejection place the payment in suspense.

The Group sorting option is by church name (**ChurchName**). Detail sorting options are by last name (**LastName**) or first name (**FirstName**).

In the **Date Range** section, select the date range for the report.

After you make your filtering and sorting selections, click [Click Here to View Report] to display the report.

Each record consists of two rows of information:

- The first row contains the giver's personal information (last name, first name, email address, and phone number), the status of the ACH transaction (“Rejection” or “Correction”), the transaction date, and the contribution amount.
- The second row contains a Description field, which provides an explanation of status of the ACH transaction. For example, one explanation given for an ACH “Rejection” might be “insufficient funds”.

**Budget**

This report shows all recurring giving and pledge amounts for an individual fund, a group of funds, or all funds.

Group sorting options are the fund ID (**FundID**), the default, and the name of the fund (**FundName**).

Detail sorting options are by name (**Name**), envelope number (**EnvelopeNumber**), gift type (**GivingType**), frequency of contribution (**GivingFrequency**), amount of installment (**InstallmentAmount**), pledge goal (**Goal**), and start date (**StartDate**).

Filtering options are by fund and gift type (recurring, pledge, or one-time).

After you make your filtering and sorting selections, click [Click Here to View Report] to display the report.

To print, save, or export a Budget report, see “The Report Viewer” on page 7-3.
Credit Card Expiration

You can use this report to help you manage failed transactions due to expired or expiring credit cards.

This report provides a list of givers whose credit cards have already expired or are due to expire in the next one to three months. Rather than waiting until a card expires, you can use the information in the report to proactively make calls or send personal emails to givers to remind them to renew their credit cards.

The Detail sorting options for this report let you sort the list on the credit card expiration date (the default), the giver’s last name, or the giver’s first name. You can sort these elements in ascending or descending order.

By selecting one or more of the Expiration Date options, generate a report that lists givers whose credit cards have expired or will soon expire as of the month in which you generate the report.

As shown in the following illustration, the report lists the following information:

- Giver’s name
- Credit card expiration date
- Envelope number
- Phone
- Email address
- Type of account (for example, independent giver)
- Card name (for example, MyVisa)
- Card number (last four digits only)
- Card type (for example, AMEX or Visa)

As with all of the reports, you can select to export the Credit Card Expiration Report in any one of the following formats: .pdf, .csv, .xls, and .rtf.
**Detail User**

This report displays a list of individuals who have administrative access to your church’s Online Giving website (see Figure 7-3).

The **Detail sorting** options for this report include the name of the giver (**GiverName**, the default), Address, Phone, and Email. You can sort the list in the report in ascending or descending order. Because this report provides a list of current users with logins to the system, there is no need to set a date range.

After you make your filtering and sorting selections, click [Click Here to View Report] to display the report.

In addition to personal details, the report also shows you the type of Online Giving account owned by each giver. The following codes represent the account type:

- **A** = church administrator account
- **I** = independent giver (a giver who creates, sets up, and manages his or her own Online Giving account).
- **M** = managed giver (a giver whose Online Giving account is created, set up, and managed by a church administrator).
- **Q** = quick giver (a giver who uses the “quick give” process to make a one-time gift or donation to specific funds set up by the church. This type of giver does not have an Online Giving account, and the Quick Give feature must be enabled by the church to allow funds to accept this method of giving).

To print, save, or export a Detail User report, see “The Report Viewer” on page 7-3.
Failed Transaction

You receive an email notification for every transaction that fails during processing. If you want to view details about a failed transaction, look at the Failed Transaction report.

No sorting or filtering options are available for this report.

Simply, select a date range and then click to view transactions that failed during the specified time frame. Following is an example of a Failed Transaction report:

![Failed Transaction Report](image)

Figure 7-4. Failed Transaction Report

To print, save, or export a Failed Transaction report, see “The Report Viewer” on page 7-3.

Forecasting

This report lets you view the projected income for a fund based on monies marked as “recurring” but not yet received.

No sorting options are available for this report. Select a fund (or all funds) and then select a date range that occurs in the future.

After you make your filtering and sorting selections, click to display the report.

To print, save, or export a Forecasting report, see “The Report Viewer” on page 7-3.

Giver’s Name and Email

This report displays a list of givers’ names and email addresses for the date range you specify. You can sort the list alphabetically (ascending or descending order) and by givers’ names. The total number of records is displayed at the bottom of the report.

After you make your filtering and sorting selections, click to display the report.

To print, save, or export a Giver’s Name and Email report, see “The Report Viewer” on page 7-3.

Note

You can export this report to an Excel worksheet, which can then be emailed to all of your givers. To do this, select Xls in the Report Viewer toolbar (see Figure 7-2). Then, click the Export report icon. Save or open the file in Microsoft Office Excel.
Giving by Gift Type

This report shows giving totals by gift type, as selected by the church members who use your Online Giving website. Gift Type options are as follows (see Table 3-1 on page 3-7 for descriptions):

- Recurring
- Pledge
- One Time
- Quick Give

You can filter this report by gift type and date range.

Detail sorting options for this report include the gift type (GivingTypeName, the default) and the gift amount (ContributionAmount).

To create a report that includes all gift types, click the Select all Gift Types link.

After you make your filtering and sorting selections, click to display the report.

The report shown in the following example shows a breakout of contributions made by gift type during the selected period from 01/09/2011 to 02/09/2011.

Note

Administrators determine which types of gifts are allowed during fund setup—see Table 3-1 on page 3-7 for descriptions of all Gift Types.
The report also includes any additional amounts donated by givers to offset the cost of the credit card processing fee charged to the church. These amounts are shown in the Addl. Giving column.

**Note**

Givers can elect to add $3.00 to their gift to offset the cost to the church of the credit card processing fee when they set up a new gift as a one-time contribution.

The Total Amount column shows you the grand total amount of all gifts made through your Online Giving website.

To print, save, or export a Giving by Type report, see “The Report Viewer” on page 7-3.

**Giving Detail by Fund**

This report (Figure 7-6) shows individual contributions made to each selected fund by Gift Type. Use this report to determine who is making online contributions to each of your established funds.

When you (the administrator) set up each fund, you determined which types of gifts are allowed. See Table 3-1 on page 3-7 for an explanation of each Gift Type.

You can filter the report by Fund and Gift Type as desired.

Group sorting options for this report include FundName and FundID. Detail sorting options include name of giver (GiverName), the default, envelope number (EnvelopeNumber), and the amount of contribution (ContributionAmount).

After you make your filtering and sorting selections, click to display the report.

![Figure 7-6. Giving Detail By Fund Report](image)

The Giving Detail By Fund report also includes any additional amounts given to offset the cost to the church of the credit card processing fee. These amounts are shown in the Addl. Giving column.

**Note**

Givers can elect to pay an additional $3.00 to offset the cost to the church of the credit card processing fee when they set up a new gift as a one-time contribution only.
A grand total of all donations made through your Online Giving site for all Gift Types is also provided at the bottom of the report page.

To print, save, or export a Giving Detail by Fund report, see “The Report Viewer” on page 7-3.

**Giving Detail**

This detailed gift report provides the following information:

- **Giver's Name**: name of contributor
- **Gift Date**: date of contribution
- **Frequency**: rate of occurrence (for example, monthly)
- **Gift Type**: recurring, pledge, or one time
- **Gift Amount**: dollar amount of contribution
- **Addl. Giving**: amount given to offset the cost of the credit card processing fee charged to the church

*Note*

Givers can elect to pay an additional $3.00 to offset the cost to the church of the credit card processing fee when they set up a new gift as a one-time contribution.

- **Total Amount**: grand total of contributions for all gifts

You can filter the report by name of fund, gift type, and date range as desired.

Group sorting options include the name of the fund (FundName) and the fund ID (FundID). Detail sorting options for this report include the name of the giver (GiverName), date of contribution (ContributionDate), frequency of contribution (ContributionFrequency), type of gift (GivingTypeName), and the contribution amount (ContributionAmount).

After you make your filtering and sorting selections, click to display the report.

To print, save, or export a Giving Detail report, see “The Report Viewer” on page 7-3.

**Individual Giver Detail**

*Note*

You can also access this report from the Home page. Click the Givers link to display your church’s list of givers. In the Details column, click for the giver whose information you want to view.

This report provides an individual giver’s contact information, envelope number, date when the Online Giving account was created, and the type of account (for example “Giver”).

1. In the Search field, type the envelope number or the name (first or last) of the giver whose information you want to view.

2. Click .

A list of givers matching your search criteria appears in the List of Givers box to the right.
3. From the list, select the giver whose information you want to view. Then, click 
[Click Here to View Report] to display the individual giver’s detail report.

The top of the report shows the name, address (email and physical), and phone number for the giver. It also shows you the payment methods used for giving and a list of funds the giver is actively contributing to along with contribution amounts and future contribution due dates. If any gifts were given on behalf of another organization, the name of the organization is listed as an OBO Parish.

At the bottom of the report, the Giving History section provides information about the giver’s previous contributions. If the user made a contribution on behalf of another parish, the report shows the details for the gift and the name of the OBO parish.

**New or Updated Pledge**

This report shows all of your new pledges as well as any updated pledges made during the date range you specify.

Group sorting options are available by name of fund (**Name**, the default) and fund ID (**FundID**).

Detail sorting options include the pledge goal (**PledgeGoal**, the default), installment amount (**InstallmentAmount**), payment frequency (**Frequency**), date when payments begin (**StartDate**), down payment amount (**DownPayment**), and date when downpayment is made (**DownPaymentDate**).

Select a date range for the report.

After you make your filtering and sorting selections, click [Click Here to View Report] to display the report.

Figure 7-7 shows you an example of this report:

![Figure 7-7. New or Updated Pledge Report](image-url)
The Status Legend enables you to keep track of the status of each pledge as one of the following:

- A- Active
- S-Suspended
- C-Canceled

To print, save, or export a New or Updated Pledge report, see “The Report Viewer” on page 7-3.

**Open Batch Detail**

This report lists online transactions that are in the system waiting to be processed in the current open batch.

Group sorting options available are name of fund (FundName, the default) and the fund ID (FundID).

Detail sorting options include name of giver (GiverName, the default) and the amount of the contribution (ContributionAmount).

After you make your filtering and sorting selections, click to display the report.

To print, save, or export an Open Batch Detail report, see “The Report Viewer” on page 7-3.

**Open Pledge**

This report shows all of the pledges for the date range you specify that have not yet been processed.

Group sorting options available are name of fund (FundName, the default) and fund ID (FundID).

Detail sorting options include name of giver (GiverName, the default), pledge goal (PledgeGoal), total amount contributed (TotalGiven), and total amount remaining to be paid (Total Due).

Select a fund or all funds. Specify a date range for the report.

After you make your filtering and sorting selections, click to display the report.

To print, save, or export an Open Pledge report, see “The Report Viewer” on page 7-3.
Payment Method Types by Fund

For each fund, this report (Figure 7-8) shows the payment methods (bank accounts and credit cards) selected by your church members.

Group sorting options for this report are the name of the fund (FundName, the default) or the fund ID (FundID). You can select specific funds or all funds to include in the report.

After you make your filtering and sorting selections, click to display the report.

![Figure 7-8. Payment Methods By Fund Report](image)

The Bank Accounts column displays the number of gifts that are being paid through a checking or savings account. The Credit Cards column shows the number of gifts that are being paid with a credit card.

To print, save, or export a Payment Method Types by Fund report, see “The Report Viewer” on page 7-3.

Pledge Goal

This report lists pledge goals for all of your funds. It shows the amount given, the pledge goal, and the percent given.

Click to display the report.

To print, save, or export a Pledge Goal report, see “The Report Viewer” on page 7-3.
Quick Give User

This report provides the following information about donors who use the “quick give” process to make a contribution:

- Giver’s name
- Giver’s address
- Giver’s phone number
- Giver’s email address
- Contribution amount

You can filter the report by Fund. The only funds listed are those you specified as “quick give” funds in the setup for the fund.

The Group Sorting option for this report is by FundName only, and the Detail Sorting option is by name of giver. You can sort in ascending or descending order.

In the Date Range section, select the date range for the report.

After you make your filtering and sorting selections, click to display the report.

Reconciliation

This report can help you reconcile your account for a given period and track down discrepancies in a bank statement. Use the filters, if necessary, to view subsets of your data (for details, see “Using the Filters to View Select Transaction Data”).

Generating a Report

1. Select a date range for the reconciliation period.
2. Make your filtering and sorting selections.
3. Click to display the report.

The default report (see Figure 7-9) shows all transaction dates, batches, payment types, givers,
and funds for the time period you specify.

![List of Reconciliation Report Transactions](image)

**Figure 7-9. List of Reconciliation Report Transactions**

4. Use the page links at the bottom to page through the report.

**Using the Filters to View Select Transaction Data**

You can view specific transaction data by choosing a single filter option or a combination filter options from these filter menus:

- Settled transaction date
- Batch
- Payment Type
- Giver
- Fund

1. To the right of the filter menu’s name, click ![Check](check_mark)

   By default, all menu options are selected.

2. Uncheck the filter’s **Show All** option.

   **Note**

   *To reconcile an account, the **Show All** option for Fund must be selected.*

3. Check the options that enable you to obtain desired views of your transaction data.

   For example, suppose that you want to view all of your Online Giving payments made with an American Express card. To do this, select the **American Express** option from the **Payment Type** filter menu, as shown in the following illustration:

   ![Illustration](image)

   **Notes**
If you cannot see all of the options, use the vertical scroll bar to bring them into view.

The **Payment Type** filter gives you the ability to sort and view your transactions by payment method (that is, ACH, American Express, Discover, MasterCard, and Visa). This filter can make it easier for you to reconcile your accounts and calculate fees associated with different types of credit card.

4. Click **OK**.

Transactions that match your filter selections are displayed.

Using our American Express card example, you can see that the report shows only those payments made with an American Express card:

The report also shows you the names of all givers who used an American Express card to pay for a gift, the amount each giver paid, and a grand total of all American Express card payments.

**Exporting a Report**

To export the report, select the desired file type from the **Export Report To** list box. Then, click **Export**.

*Note*

*Due to the size of this report, we suggest that you export the report to an Excel file to view it. To print this report, you must export it to an Excel file.*
Special Instruction

This report shows special instructions submitted by givers when making one-time and “Quick Give” donations. These types of gifts are typically given in honor of or in memory of an event or a person.

Group sorting options are available by the name of the fund (FundName, the default) and the fund ID (FundID). You can also choose a date range for the report.

After you make your filtering and sorting selections and choose a date range, click [Click Here to View Report] to display the report in the report viewer.

To print, save, or export a Special Instruction report, see “The Report Viewer” on page 7-3.

Suspended/Canceled Giving

TIP: It is possible for a member to temporarily suspend giving and then forget to reactivate the contribution. You can use this report to identify such members and then decide whether it is appropriate to contact them regarding their suspended contribution.

This report shows gifts that have been suspended or canceled (that is, electronic withdrawals have been stopped) by your church members. It includes the fund or gift name, the giver's envelope number, the gift type, the amount, and the name of the donor.

The sorting option available for this report is by the name of the fund (FundID).

Click [Click Here to View Report] to display the report.

To print, save, or export a Suspended/Cancelled Giving report, see “The Report Viewer” on page 7-3.

Viewing Definitions of Payment Acronyms

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 Explanation of Payment Acronyms link, which is located in the bottom left corner of the Online Giving Reports page (Figure 7-1).
Appendix A: Payment Authorization Form

<table>
<thead>
<tr>
<th>Church, School, or Diocese Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name on account (Print)</td>
<td>Account Holder's Phone #</td>
</tr>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>City, State, and Zip</td>
<td></td>
</tr>
</tbody>
</table>

I authorize the following:
- [ ] New Payment from Account Specified Below
- [ ] Change Indicated Below
- [ ] Discontinue Electronic Funds Transfer from Account or Fund Specified Below.

### Account Information

**Bank Account Information**
- [ ] Checking *(please attach voided check)*
- [ ] Savings *(please attach deposit slip)*

**Credit Card Information**
- [ ] American Express
- [ ] Discover
- [ ] Other *(provide type below)*

<table>
<thead>
<tr>
<th>Bank Name</th>
<th>Credit Card Type</th>
<th>Credit Card #</th>
<th>Credit Card Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mastercard</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visa</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Routing Number</th>
<th></th>
<th>Authorization Effective Date</th>
<th>Authorization Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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### Contribution Schedule

<table>
<thead>
<tr>
<th>Fund Type <em>(e.g., Sunday Offering, DSA Pledge, etc.)</em></th>
<th>Payment Schedule</th>
<th>Amount</th>
<th>Payment Start Date</th>
<th>Collection Date <em>(Date for withdrawal from your account)</em></th>
<th>Down Payment <em>(if applicable)</em></th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Weekly</td>
<td>[ ] Monthly</td>
<td>$</td>
<td></td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>[ ] Monthly</td>
<td>[ ] Quarterly</td>
<td>$</td>
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<td>$</td>
</tr>
<tr>
<td>[ ] Quarterly</td>
<td>[ ] 2x/Month</td>
<td>$</td>
<td></td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>[ ] 2x/Year</td>
<td>[ ] One Time</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>[ ] Yearly</td>
<td>[ ] One Time</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

I authorize the above-named church or school to debit from the account specified on this form. This authorization will remain in effect until I give reasonable change or cancellation notice to terminate authorization. I understand there will be a nonsufficient funds (NSF) fee charged to my account for NSF debits.

Authorized account signature:_________________________ Date:_________________

*For checking or savings account debits, please attach your voided check or savings deposit slip.*
Appendix B: Online Giving Checklist

Following is a master checklist that you can use when setting up Online Giving for your church. You can use the check boxes to track your progress on the list.

☐ **Attend an Online Giving Demonstration**
  You may also attend additional demos at any time and may have additional staff attend demos.
  Go to [www.parishsoft.com/webinars](http://www.parishsoft.com/webinars) to register.

☐ **Information Form Filled Out and Returned to ParishSOFT**
  This information is used to complete the Sage Application.
  Fax to 734-205-1011 or E-mail your account rep.

☐ **Receive Sage Application to Review and Sign**
  This is the application and contract terms for Online Giving. You will have this application in about one business day after returning the completed Info Form.

☐ **Return Signed Application to ParishSOFT**
  Make sure to also include a copy of your voided check.
  Fax: 734-205-1011 or E-mail: [psops@parishsoft.com](mailto:psops@parishsoft.com).

☐ **Approval**
  You should have your account approved within 2 business days after you return your signed application and a copy of your voided check.
  
  - **New Merchant Information email from Sage:** This e-mail contains your merchant information that is needed to complete your setup. You will receive this email within two business days of being approved. If you do not get this email within two days, please contact ParishSOFT Operations at 866-930-4774 x112 or via email at [psops@parishsoft.com](mailto:psops@parishsoft.com).
  
  - **Online Giving Setup Information email from ParishSOFT:** This e-mail has a letter attached that contains your URL and your registration code.
Marketing Online Giving

- Mailing to members promoting Online Giving.
  Mailings can take several weeks to be set up, proofed, printed and mailed. You will need to start planning your mailing early.
- Add “I Give Online” and a check box to your offering envelopes. You may also want to add “To sign-up, please visit www.your-web-address”
- Bulletin Announcements
  Plan your first bulletin announcement to coordinate with your mailing.

Setting Up Your Online Giving Administrative Account

1. Click the URL in the Online Giving Setup Information email you received from ParishSOFT.
2. On the Home page, click the Create New Account link.
3. Complete the New User Account Registration form, using the Registration Code in your email from ParishSOFT to create your administrative account. This code can be used to set up as many admin accounts as needed. Please note that an email address can only be used to set up one account.
4. After you complete the New User Account Registration, you will receive an e-mail to validate your account. This is to ensure that you entered the email address correctly.

Setting Up Your Online Giving Page

1. Go to your church’s online giving page.
2. Log in using your admin account information.
3. Click the Church Details link.
4. Scroll down to the Church Merchant Key section. Enter the Virtual Terminal ID# and the M_Key Number that you received in the New Merchant Information email from Sage. You can make changes to the church name and contact information in this section.
5. Click the Welcome Message link to create a custom message. You can change this message at any time. The message does not have to be done to continue.
6. Click the Contact Us Page link and enter your church’s contact information. We suggest putting office hours in this text. You can change this text at any time. The information does not have to be complete to continue.
Setting-up Payment Methods
Click the Payment Settings link.

- Accepted Payment Methods. Select the payment methods that your parish will be accepting
  - Bank Accounts: Checking & Savings
  - Credit Cards: Visa & MasterCard, Discover, American Express

  If a payment method’s option appears shaded or dimmed, your account has not been approved for accepting payments using this method. If you would like to use a disabled payment method, contact ParishSOFT.

- Contribution Frequencies

  This is how often you are going to allow your members to give. The more options you select, the more flexible it is for your members.

  Your options are Weekly, Biweekly, Monthly, Twice a Year, Yearly and Quarterly.

- Accepted Days of Giving
  - This is used only if you are going to limit the day of the week that your givers who choose One Time, Weekly or Biweekly can give.

  - This may cut down on the batches that your parish has but it can also be less flexible for your givers.

  - Call Online Giving (866-930-4774, extension 2) with any questions that you have on this section.

- Quick Give

  The option to enable quick gifts is set to On by default. If you do not want to allow this type of giving, change the option to Off.

- Click Save and your payment settings are all set.

  You can come back and make changes prior to releasing Online Giving to your members.
Setting Up Funds or Collections

Your funds page will be blank. You will need to set up your collections prior to releasing Online Giving to your members.

1. Click the **Funds** link.
2. Click on **Add New Fund**.

- **Status**
  - **Active**: means that your givers can see this fund and donate to it.
  - **Inactive**: means that your givers cannot see this fund and cannot donate to it.

- **Fund Name**: what you want to call the collection.

- **Fund Number**:
  - For ParishSOFT users, the fund number is the COA ID# from your contribution software.
  - For other users of other software, call ParishSOFT Technical Support to find out what number to put in this field.

- **Description**: what you want your givers to know about the collection.
  - You can click on the globe link to add a web address link.
  - For your monthly collections, you may want to let your members know which Sunday of the month the collection is normally taken up.
  - For one-time collections, you may want to let your givers know the date of the collection.

- **Date Range**: the date range that you want your givers to be able to view the collection.
  Many churches are not putting dates in this field and allowing the collections to be seen all the time.

- **Gift Types**: This is how you are going to allow your members to give to a fund.
  - **Recurring**: used for funds that you want your members to give to over and over again. This is normally used for things like weekly collections and monthly collections. Churches are also using this for Christmas, as it is the same time every year and the members can choose the yearly option.
  - **Pledge**: used for collections, such as capital campaign. Many stewardship churches use this option for weekly collections. This will allow members to make their pledge of treasure.
  - **One Time**: used for one-time gifts, such as Diocesan collections, Ash Wednesday, Easter, and so on. This option also has a place for the member to send a note, so it can be used for things like Mass Intentions.

- **Tax Details**: should be checked for all collections that are tax deductible.
Appendix B: Online Giving Checklist

☐ **Fund Suggestions**
  - Weekly Offering
  - Monthly Collections
  - Diocesan Collections
  - Capital Campaigns
  - Building Funds
  - Mass Intention
  - Appeals

☐ **Set Up an Online Giving Link on the Website**
  - Make sure to include the www. when setting up the link. Omitting the www. will interfere with the security certificate.
  - Make sure the Online Giving site opens in its own window. It cannot be placed in iframes.
Appendix C: System Email Notifications

The Online Giving has an automatic email notification feature that updates and informs specific donors by email when an action was performed or needs to be performed.

This appendix shows you examples of the automatic email messages generated by the system and, in each case, describes the event that caused the email to sent. In the accompanying illustrations, the bracketed fields that are highlighted in yellow contain information auto-filled by the system. Typically, such information consists of donor data pulled from the database, such as the donor’s name, phone, and email address. If you added a custom message when you configured the email (see Figure: 2-10 on page 14), the system includes your message in the body of the email. In the sample illustrations, the custom message field is also bracketed but highlighted in green to distinguish it from auto-filled information.

Process Gifts to Suspend

The system sends the following email to inform a donor that his or her donations to a gift are suspended. The specific reason for the suspension is cited in the email.

![Email Template]

Your Online Gift to {Fund} has been Suspended

(Additional message added by organization)

Gift Name: {Fund}
Gift Type: {Gift Type}
Gift Date: {Date}
Reason: {Suspend Reason}

Thank you,
{Organization}
(Phone in OLG System)
(Email in OLG System)

Explanation of Payment Acronyms
Process Expiring Bank Cards
The system sends the following email to inform a donor that the credit card currently being used for a payment expired or is due to expire soon,

```
Payment Method [Payment Method] {has Expired / will be Expiring Soon!}
Our records indicate that your payment method [Payment Method] ending in (Last 4 Digits of Account Number) (expired [# of days] day(s) ago, will be expiring in [# of days] day(s).)

[Additional message added by organization]
All Giving associated with this payment method will be suspended when it expires. To avoid any interruptions in your Giving, please click here to update your Payment Method.

Thank you,
(organization's name)
(phone in olg system)
(email in olg system)
```

Managed Email User
The system sends the following email to inform a donor that an administrator is no longer managing his or her Online Giving account. The account was transferred to the donor who now has sole responsibility for managing the account.

```
{Additional message added by organization} Your Managed Online Giving account has been changed so that you can manage it independently. Your user id is: {User ID}.
Before you can login you will need to create a password. To do so please click the following link: link

Thank you,
{organization}
(phone in olg system)
(email in olg system)
```
Appendix C: System Email Notifications

Update Fund Status
The system sends the following email to a donor to inform him or her a fund is no longer accepting donations because the organization deactivated the fund.

[Additional message added by organization]

We are sending you this email because you are actively giving to {Organization}. This Church has been Deactivated and is longer accepting new Donations.

Your Active Gifts have also been cancelled. If you any further questions, please contact your church at:

[Email in Online Giving System]
[Phone in Online Giving System]

Update Church Status
The system sends the following email to donors to inform them that the organization stopped using the Online Giving application.

[Additional message added by organization]

We are sending you this email because you are actively giving to {Organization}. This Church has been Deactivated and is longer accepting new Donations.

Your Active Gifts have also been cancelled. If you any further questions, please contact your church at:

[Email in Online Giving System]
[Phone in Online Giving System]
Process Gifts
The system sends the following email to a donor to let him or her know that the donation was received and is currently being processed by the system.

{Organization}

Dear {Donor's First Name}:

{Additional message added by organization}

Thank you for your payment. According to your online giving directions, we are processing the following transactions:

Transaction Detail Appears Here

If you have questions about these transactions, please contact us (see details below).

Thank you,

{Organization}

[Phone in OLG System]
[Email in OLG System]
Appendix D: Enabling JavaScript

To use the Online Giving application, you must have JavaScript support enabled in your browser. If JavaScript is not enabled, the application cannot function correctly and you are prevented from using certain features.

By default, most mainstream Web browsers have JavaScript enabled. However, if JavaScript is not enabled in your browser or if it is turned off, you must re-enable it. The instructions in this section show you how to enable JavaScript for supported browsers.

Internet Explorer

1. From Internet Explorer’s Main menu, select Tools.
2. From the Tools menu, select Internet Options.
3. In the Internet Options window, select the Security tab. Click .

   The Security Settings - Internet Zone window is displayed.
4. Scroll down to the Scripting section. Under Active scripting, and select the Enable option:

   ![Security Settings - Internet Zone window]

   The system displays a Warning message asking you to confirm your selection.
5. Click Yes to confirm the change.
6. Click OK to exit the Security tab.
7. In the address field at the top of the browser, click to refresh the page.
Google Chrome

1. In the upper-right corner of your browser window, click ☰.
2. Select the Settings option.
3. Select the Show advanced settings... link at the bottom of the Settings page.
4. In the Privacy group, click Content settings to display the Content settings window.
5. Under JavaScript, make sure that the Allow all sites to run JavaScript (recommended) option is selected, as shown in this illustration:

   ![Content settings window](image)

6. Click Done to save the setting and exit the Content settings window.
Appendix D: Enabling JavaScript

Mozilla Firefox

1. In the browser’s address bar, type the following:
   
   about:config

2. Press Enter.

   A Warning message is displayed.

3. Click

4. In the Search box at the top, type the following:

   javascript.enabled

   The browser displays the results of your search:

   ![Firefox search result](image)

   If Value is set to true, javascript is enabled.

5. Do one of the following:

   - If Value is set to true, it means javascript is enabled. Close the browser or click + to open a new browser window and log in to Online Giving.
   - If Value is set to false, double-click the line containing the javascript.enabled entry to change the value to true. Then, close the browser or click + to open a new browser window and log in to Online Giving.
Appendix D: Enabling JavaScript

Safari

1. In the upper-right corner of the browser window, click [app].

2. Select Preferences.

3. In the Advanced window, click [security] to display the Security window.

4. In the Web content group, select the Enable Java option, as shown in this illustration:

![Security window]

5. Click [exit] to exit and save the selection.
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