



Online Giving

User Guide for Donors



Online Giving User Guide for Donors

Pub 111, February 2014
Version 4.00



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Table of Contents

Title	Page
About This Guide	1
Online Giving Features	1
Advantages for Donors	1
Advantages for Your Church	2
System Requirements	2
Online Giving Security	2
Getting Help	3
Contacting Us	3
Getting Started	3
Connecting to Your Church’s Online Giving Website	4
Creating an Online Giving Account	5
Logging in to Your Account	8
Logging Out of Your Account	9
Giving Gifts	9
Quick Give	9
Giving Regular Gifts Online	12
Step 1: Specify Your Method of Payment	12
Step 2: Choose a Fund	19
What Happens If My Gift Payment Cannot Be Processed?	23
Managing Your Payment Methods	24
Changing a Payment Method	24
Deleting a Payment Method	25
Reinstating a Payment Method for a Failed Transaction	26
Changing Your Personal Information	28
Managing Your Contributions	29
Viewing Your Active Contributions	29
Changing a Gift	31
Temporarily Stopping Payments for a Gift	32
Resuming Payments for a Suspended Gift	33
Canceling an Active Gift	33
Viewing a Summary of Active Contributions	34
Viewing Your Giving History	34

Online Giving

User Guide for Donors

Viewing and Printing Contribution Reports	37
Summary Report of Contributions to a Specific Fund	37
Active Giving Report	38
Giving History Reports	38
Contribution Details Report	40
Retrieving Forgotten Login Credentials	41
What If I Forget My User ID?	41
What If I Forget My Password?	42
Index	43

List of Tables

Table		Page
1	New User Account Registration Fields	7
2	Credit Card Account Fields	17
3	Bank Account Fields	18

List of Figures

Figure		Page
1	Welcome Page	4
2	Creating a New User Account	5
3	User Login	8
4	Your Home Page	8
5	Welcome to Quick Give! Page	9
6	Manage My Payment Methods Page	13
7	Adding a New Credit Card	14
8	Manage My Payment Methods: My Credit Cards Tab	15
9	Adding a New Bank Account	15
10	Manage My Payment Methods: My Bank Accounts Tab	16
11	Funds Available for Gift Giving	19
12	Manage My Payment Methods: Failed Payment Method	26
13	Reactivate Gifts Window	27
14	Viewing and Changing Your Personal Information	28
15	My Active Online Giving Page	30
16	Gift Details	31
17	My Online Giving History Page	34
18	Detailed Giving History for a Selected Fund	35
19	PDF Report Toolbar	37
20	Print Online History Report Window	38
21	Summary Report of Total Contributions	39
22	Full Detail Report (for Tax Purposes)	40
23	Contribution Details	40
24	Forgot your User ID? Window	41
25	Forgot Your Password? Window	42

Online Giving

About This Guide

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

Online Giving Features

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

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

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

Advantages for Donors

Online Giving offers many benefits to you and your family:

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

Advantages for Your Church

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

System Requirements

Online Giving is available 24/7 and requires no special hardware or software. For church administrators and individual member users of the system, all that is needed is an Internet connection and Web browser, including Microsoft® Internet Explorer 7.0 (or later), Firefox 3.0 (or later), Safari 3.0 (or later) or Google Chrome 2.0 (or later).



Cookies and Java Script must be enabled on your PC, and popup blockers must be disabled. Turn off any system security programs or other programs that can block access (for example, Norton, McAfee, and the Google toolbar). 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 in your browser, see your browser's Help.

Online Giving Security

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

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

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

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

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

Getting Help

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



Simply click the link to view the video help.

Contacting Us

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

Getting Started

The information in this section shows you how to connect to your church's Online Giving website so that you can then give a gift to the fund or funds of your choice.

After you connect to the website, you need to decide how you want to give your gift. For your convenience, we offer two options for giving, each having its own benefits for the giver. Whichever method you choose, your gift is completely private and secure, and the church appreciates your generosity and support. Before you begin, consider the following questions, which will help you decide which giving method is best for you:

- Do you simply want to make a one-time contribution or occasional gift?
If so, use the "quick give" method (see "Quick Give" on page 9). This method enables you to immediately give a gift to the church without having to set up an account. Note that this option is only available if the church accepts this special giving method.
- Do you want to provide ongoing support with recurring contributions and pledges?
If so, we recommend that you create a personal Online Giving account. Having an account offers you many advantages, including:
 - Enables you to set up offerings and tithes on a regular basis as well as make pledges to the mission or fund of choice.
 - Gives you the opportunity to pay for special programs, seminars, and camps as well as contribute to fundraisers and charities.
 - Makes it possible for you to give on future dates and change (edit and delete) your giving plan at any time.
 - Securely stores your payment information so that you do not have to enter payment details over and over again.
 - Tracks your past and present contributions.
 - Sends you email reminders about due dates for future contributions.
 - Lets you view and print past giving records.

To get started, first connect to the church's online giving website.

Connecting to Your Church's Online Giving Website

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

Note

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

2. Do one of the following:
 - Go to the church's website and click the link to their Online Giving page.OR
 - If the church gave you the URL of its Online Giving page, type or copy this URL into your browser's address field.

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

Note

The Welcome page you see may differ from the one shown in Figure 1.

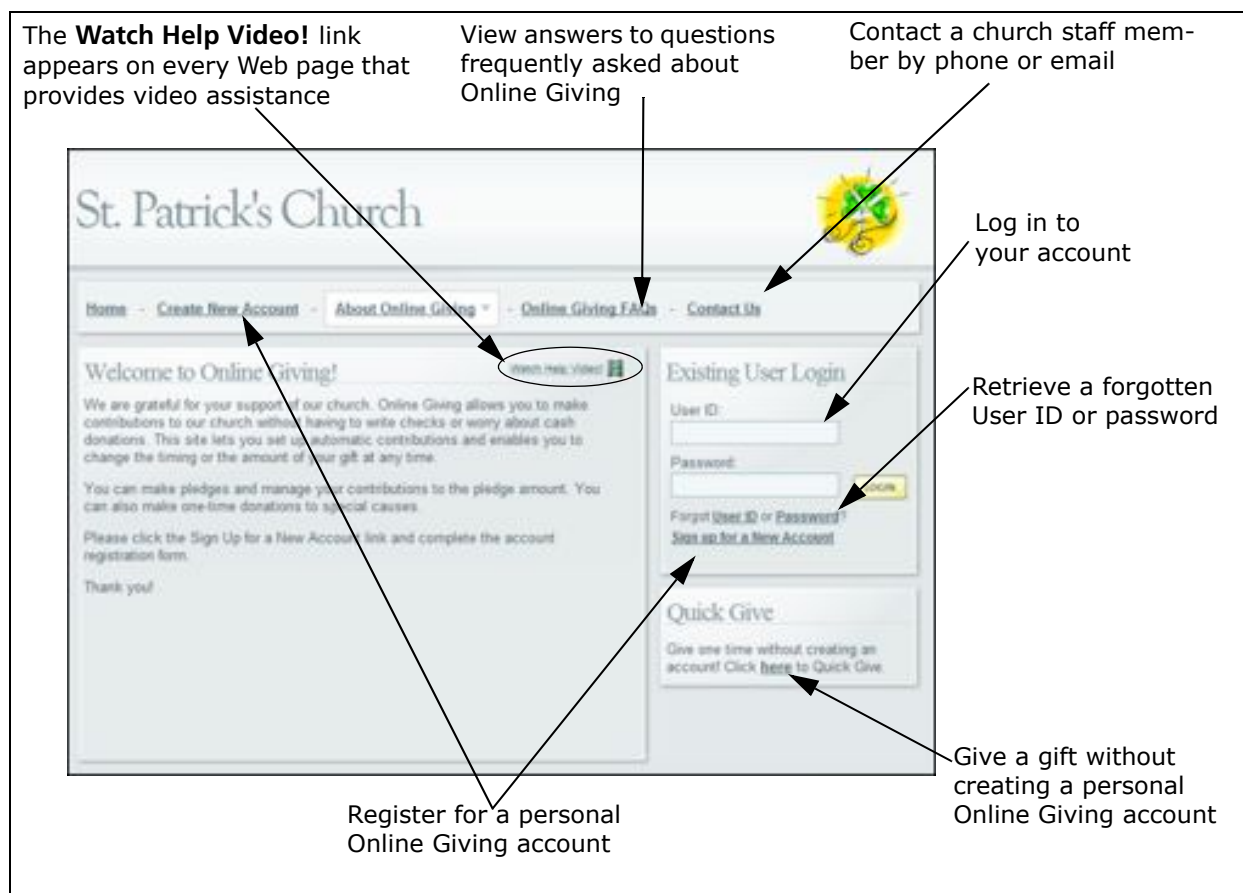



Figure 1. Welcome Page

3. If desired, add the website to your list of frequently visited sites.
 - Firefox users: select **Bookmarks > Bookmark this Page**
 - Internet Explorer users: select **Favorites > Add to Favorites**.
 - Chrome users: click  (located in the address bar) and give the site a name.
 - Safari users: display the Menu bar, and then select **Bookmarks > Add Bookmark**.
4. Do one of the following:
 - If you want to make a “quick give” contribution, go to "Creating an Online Giving Account", which follows.
 - If you want to set up a personal Online Giving account, go to “Creating an Online Giving Account” on page 5.

Creating an Online Giving Account

Creating a user account is a one-time process, which consists of creating a user ID and password. It takes just a few minutes to complete the setup of your account. Then, whenever you want to give a gift, change your schedule for ongoing contributions, or view your giving history, you can log in and manage your account.

To create a new account, follow these steps:

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

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



Figure 2. Creating a New User Account

Online Giving

User Guide for Donors

2. Complete the Login, Personal Information, and Address fields on the form. Descriptions and requirements for these fields are provided in Table 1 on page 7.

Note


The asterisk () indicates a required field.*

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 .

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

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

Required Information for a New Account

Table 1 describes the information required for the fields on the **New User Account Registration** page (shown in Figure 2).

Table 1: New User Account Registration Fields

Login Information	
User ID*	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 (&), exclamation point (!), asterisk (*), the "at" (@) symbol, and the period (.). If you want, you can use your email address as your User ID, For example, dmiller@parishsoft.com.
Password*	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 (&), exclamation point (!), asterisk (*), the "at" (@) symbol, and the period (.).
Confirm Password*	Required. Case Sensitive. Enter your Password exactly as you did in the Password field.
Registration Code	The Registration Code provides administrator-level access to church staff.
Personal Information	
First Name*/Last Name*	Required.
Email Address*	Enter your complete email address. The Online Giving system restricts users to one account per email address. Multiple accounts with the same email address are not permitted.
Phone	Recommended but not required.
Address Information	
Address 1* City/State* and Zip*	Required
Address 2	Optional.

Logging in to Your Account

After you receive your login credentials, log in to your account using the following procedure:

1. On the Welcome screen, enter your **User ID** and **Password** in the **Existing User Login** section (Figure 3):

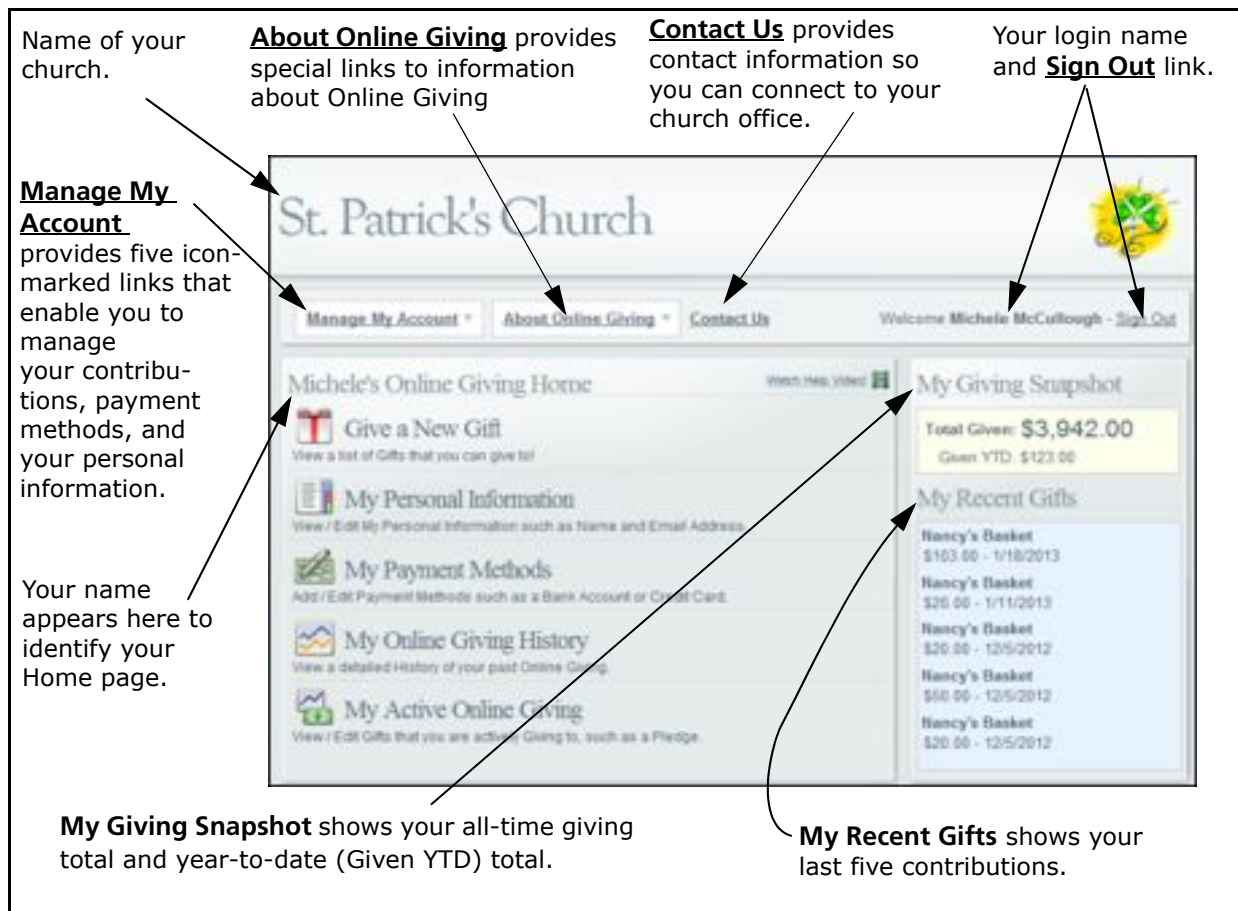


The image shows a web form titled "Existing User Login". It contains two input fields: "User ID:" and "Password:". To the right of the password field is a yellow "LOGIN" button. Below the input fields, there are two links: "Forgot User ID or Password?" and "Sign up for a New Account".

Figure 3. User Login

2. Click .

Your Home page is displayed. Figure 4 shows the information contained on your Home page:



The screenshot shows the home page for St. Patrick's Church. The page is titled "Michele's Online Giving Home" and features a navigation bar with "Manage My Account", "About Online Giving", and "Contact Us". The main content area includes sections for "My Giving Snapshot" (Total Given: \$3,942.00, Given YTD: \$123.00) and "My Recent Gifts" (listing five contributions to Nancy's Basket). Annotations with arrows point to various elements: "Name of your church." points to the church name; "About Online Giving provides special links to information about Online Giving" points to the navigation bar; "Contact Us provides contact information so you can connect to your church office." points to the navigation bar; "Your login name and Sign Out link." points to the user name and sign out link; "Manage My Account provides five icon-marked links that enable you to manage your contributions, payment methods, and your personal information." points to the main content area; "Your name appears here to identify your Home page." points to the user name; "My Giving Snapshot shows your all-time giving total and year-to-date (Given YTD) total." points to the snapshot section; and "My Recent Gifts shows your last five contributions." points to the recent gifts section.


Figure 4. Your Home Page

Logging Out of Your Account

As a security measure, you should always log out of your account at the end of each Online Giving account session. As an extra precaution, close the browser's window before leaving the computer.

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

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

2. Close your browser's window. To do this, click  .

Giving Gifts

There are many ways to give. This section describes two methods of giving:

- Quick Give
- Regular Gifts and Pledges

Quick Give

The Quick Give method does not require you to register for an online giving account. The process takes just minutes to complete. First, you will complete a short personal information form. Then, you will specify a contribution amount, specify a payment method, and submit your gift.

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.

1. In the **Quick Give** section, located on the Welcome page (see Figure 1 on page 4), click the **here** link.

The **Welcome to Quick Give!** page (Figure 5) is displayed:



Figure 5. Welcome to Quick Give! Page

Online Giving

User Guide for Donors

2. Read the **Welcome to Quick Give!** introduction. Then, do one of the following:

- If you want to create an Online Giving account, click the **Create Account** link or the Sign up for a New Account link (see Figure 1 on page 4). Then, exit this procedure and complete the process for creating an account. Instructions for creating an account are under “Creating an Online Giving Account” on page 5.

OR

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


The personal and gift information form is displayed, as shown in the following illustration:

The screenshot shows the 'Step 1 (Enter Information)' form for St. Patrick's Church. The form is titled 'Step 1 (Enter Information)' and includes a note: 'Please fill out the form below. Fields with asterisk next to them are required. The address information you provide will only be used for billing purposes.' The form is organized into three columns: 'Personal Information', 'Address Information', and 'Gift Information'. The 'Personal Information' column includes fields for First Name, Last Name, Email Address, Confirm Email Address, Phone #, andEnvelope #. The 'Address Information' column includes fields for Address #, Address 2, City/State, and Zip. The 'Gift Information' column includes fields for Fund, Amount, Payment Method, and Special Instructions. A security code is displayed at the bottom left, and 'CANCEL' and 'NEXT' buttons are at the bottom right.


3. Enter your personal and address information.

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 this information.

4. In the **Gift Information** section, do the following:
 - a. Select the fund and enter the dollar amount of your contribution.
 - b. Select a payment method (**Credit Card** or **Bank Account**). Then, click the **Add** link and supply account details. When done, click  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 replaced with the **Unlock** link. If you need to change your payment method or payment method details, click the **Unlock** link. The **Unlock** link then changes the **Edit** link. Select a new payment method or click the **Edit** link to make changes to your payment method details. When done, click  to save the information and return to the form.*

- c. (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.
 - d. 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.
5. (optional) If you want to include a note or special instructions regarding the use of your donation, type your note 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 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.*


7. When you are finished, click .

The **Confirmation** window is displayed.

Online Giving




User Guide for Donors

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 .

Note

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

- If certain information is not correct, click , make the necessary changes, and then click  to return to the **Confirmation** window. Click  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.

Giving Regular Gifts Online

The process of giving regular gifts online consists of two main steps:

1. Specify your method of payment.
2. Give a gift to the fund of your choice.

Detailed instructions for each step are given in this section.

Step 1: Specify Your Method of Payment

Before you can give a gift, you need to specify how you will pay for your gift.

Note

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

To specify the type of payment, follow these steps:

1. On your Home page (Figure 4) or from the **Manage My Account** link, select the **My Payment Methods** option:



The **Manage My Payment Methods** page (Figure 6) is displayed. This page has two sections. The section on the left lists all of your accounts. This section is empty the first time you log in. After you add your payment methods, you will see them listed in this section.

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

The lower-right section also includes links to help you manage your accounts. These links are described in detail later in this manual.

Notes

Any accounts that are set up for giving are displayed on the tabs on the left. After you add your accounts, simply select the desired tab to see the name of the account.

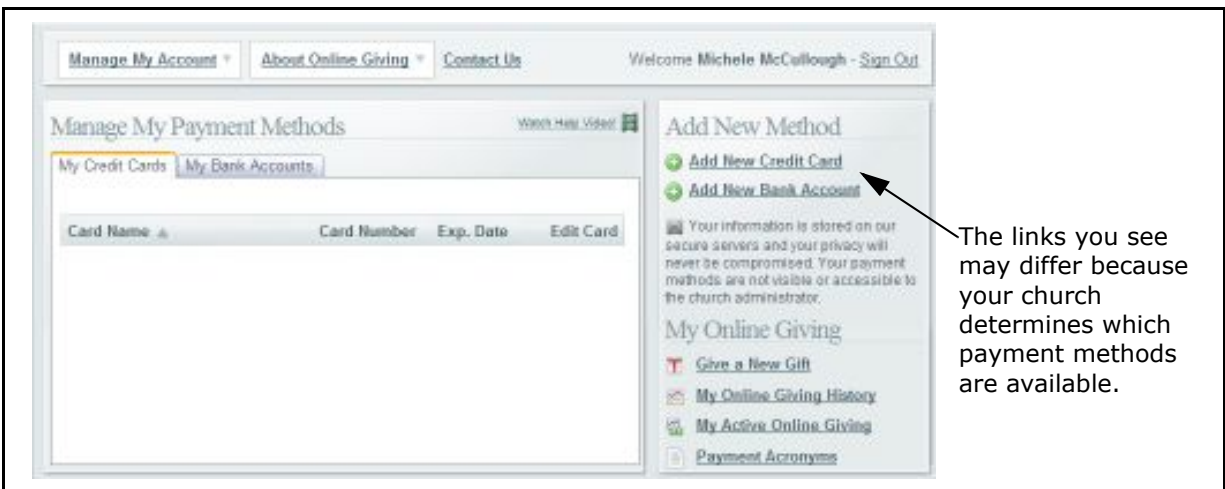


Figure 6. Manage My Payment Methods Page

2. On the right, select the desired link:

Note

*Your church determines the payment methods it accepts so the **Add New Credit Card** option may not be shown on your **Payment Methods** page.*

- **Add New Credit Card**
- **Add New Bank Account**

3. Depending on the payment option you selected in Step 2, do one of the following:
 - If adding a new credit card, the Add New Credit Card window (Figure 7) is displayed. Do the following:
 - a. Enter the required information for your credit card.

Note

Required fields are identified by an asterisk (). Descriptions of the fields in this window are provided under "Credit Card Account Fields" on page 17.*



Figure 7. Adding a New Credit Card

- b. In the **Enter the code as shown** field, 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.

- c. Click **SUBMIT** to save your account information in the Online Giving system.

Your credit card account is now set up and ready to be used to give gifts. You see it listed on the My Credit Cards tab (Figure 9):

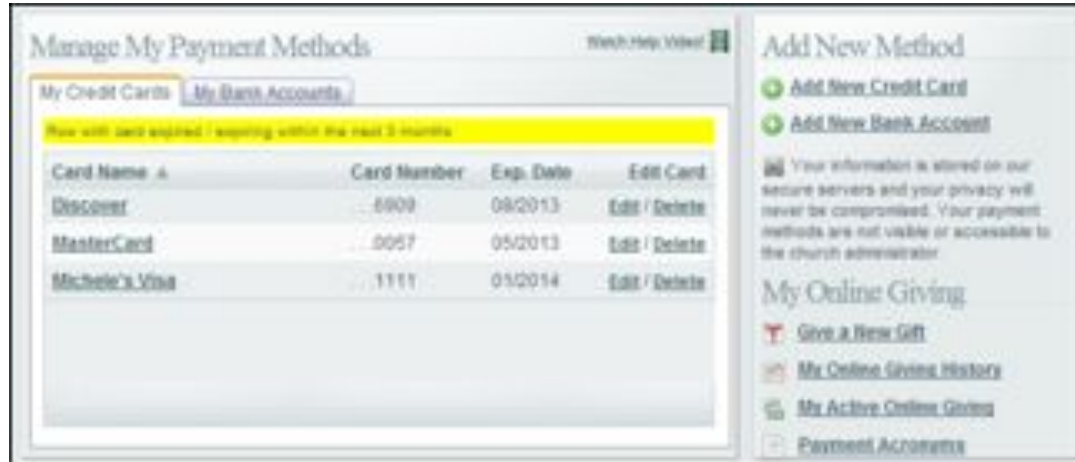


Figure 8. Manage My Payment Methods: My Credit Cards Tab

- d. Go to "Step 2: Choose a Fund" on page 19.
- If adding a new bank account, the Add New Bank Account window (Figure 9) is displayed. Do the following:
 - Enter the required information for your bank account.

Note

Required fields are identified by an asterisk (). Descriptions of the fields in this window are provided under "Bank Account Fields" on page 18.*

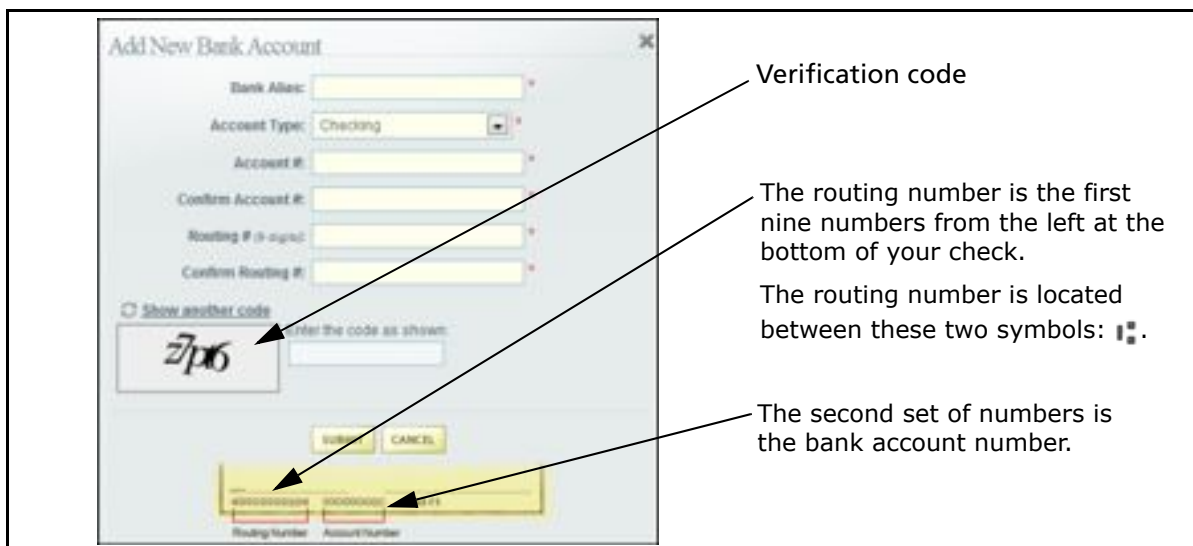


Figure 9. Adding a New Bank Account

- b. In the **Enter the code as shown** field, 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.

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

Your bank account is now set up and ready to be used to give a gift. You see it listed on the My Bank Accounts tab (Figure 10):

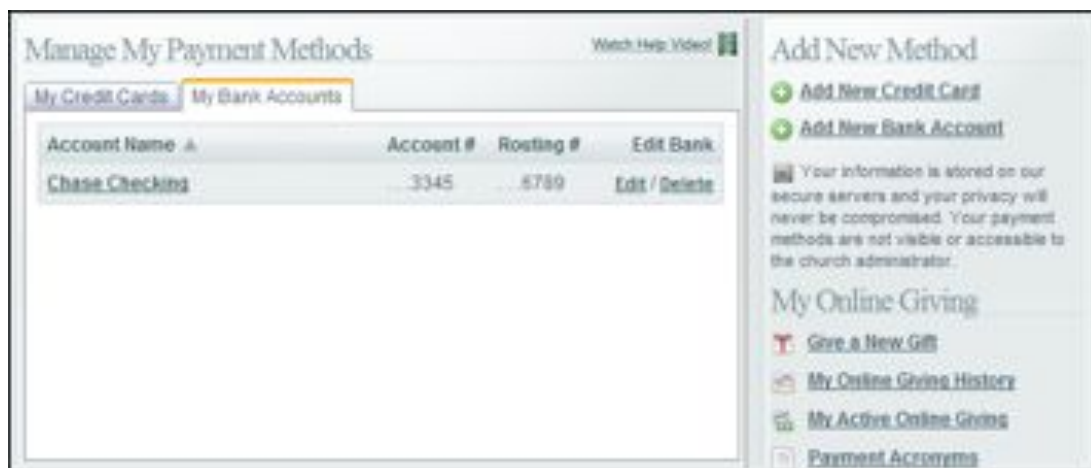


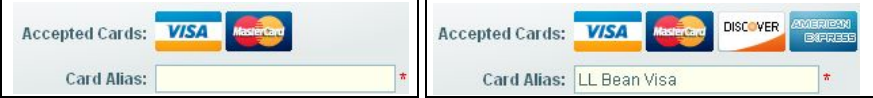
Figure 10. Manage My Payment Methods: My Bank Accounts Tab

Go to “Step 2: Choose a Fund” on page 19.

Credit Card Account Fields

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

Table 2: Credit Card Account Fields

Field	Description
Accepted Cards	Your church accepts the cards shown. For example: 
Card Alias*	Required. Enter a description to help you identify the card (for example, "LL Bean Visa" or "MasterCard with Joe's picture").
Card Number*	Required. Enter your complete card number with no spaces, special, or alphabetic characters. <ul style="list-style-type: none"> • Visa account numbers require 16 digits and begin with the number 4. • MasterCard account numbers require 16 digits and begin with the number 5. • American Express account numbers require 15 digits and begin with the number 3. • Discover account numbers require 16 digits and begin with the number 6.
Expiration Date*	Required. Click <input type="checkbox"/> and then select the month and year.
Address	Not required. If the billing address on your card differs from the address that you entered for your user account, click the link to enter your billing address.
Phone Number*	Required. Enter your phone number.
Address Line 1*	Required. Enter the first line of the address (primary address number and street name) that is on file with your credit card company.
Address Line 2	If applicable, enter the rest of your address, such as the apartment number or building, that is on file with your credit card company.
City*	Required. Enter the city on file with your credit card company.
State*	Required. Click <input type="checkbox"/> and then select the state on file with your credit card company.
ZIP*	Required. Enter the ZIP Code on file with your credit card company.
Enter the code as shown	Required. Type the code that you see in the Show another code box. <i>If you have difficulty reading the code shown, click the Show another code link. The application displays a new code for you.</i>

Bank Account Fields

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

Table 3: Bank Account Fields

Field	Description
Bank Alias*	Required. Enter the name of the banking institution for your account.
Account Type*	Click <input type="button" value="v"/> and then select Checking or Savings . The Checking option is the default.
Account Number*	Required. Account numbers must contain 4 to 17 digits. No spaces, special characters, or alphabetic characters are permitted.
Confirm Account Number*	Required. Enter your account number again for validation and security purposes.
Routing Number*	Required. The routing number requires nine digits and must begin with one of the following numbers: 0, 1, 2 or 3. No spaces, special characters, or alphabetic characters are permitted.
Confirm Routing#*	Required. Enter your routing number again for validation and security purposes.
Enter the code as shown	Required. Type the code that you see in the Show another code box. <i>If you have difficulty reading the code shown, click the Show another code link. The application displays a new code for you.</i>

Sage Payment Solutions Terms and Definitions

Sage Payment Solutions 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 Payment Solutions terms and abbreviations by clicking the link **Payment Acronyms Descriptions**, which is located in the right section of the **Manage My Payment Methods** page (see Figure 6 on page 13).

Step 2: Choose a Fund

This procedure shows you how to choose the funds that receive your gifts.

Note

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

1. On your Home page (Figure 4) or from the **Manage My Account** link, select **Give a New Gift**:



The church funds available for giving are displayed, as shown in Figure 11. Your church determines which funds are listed and available for giving and the types of contributions (for example, pledges only) that you can make to a fund.

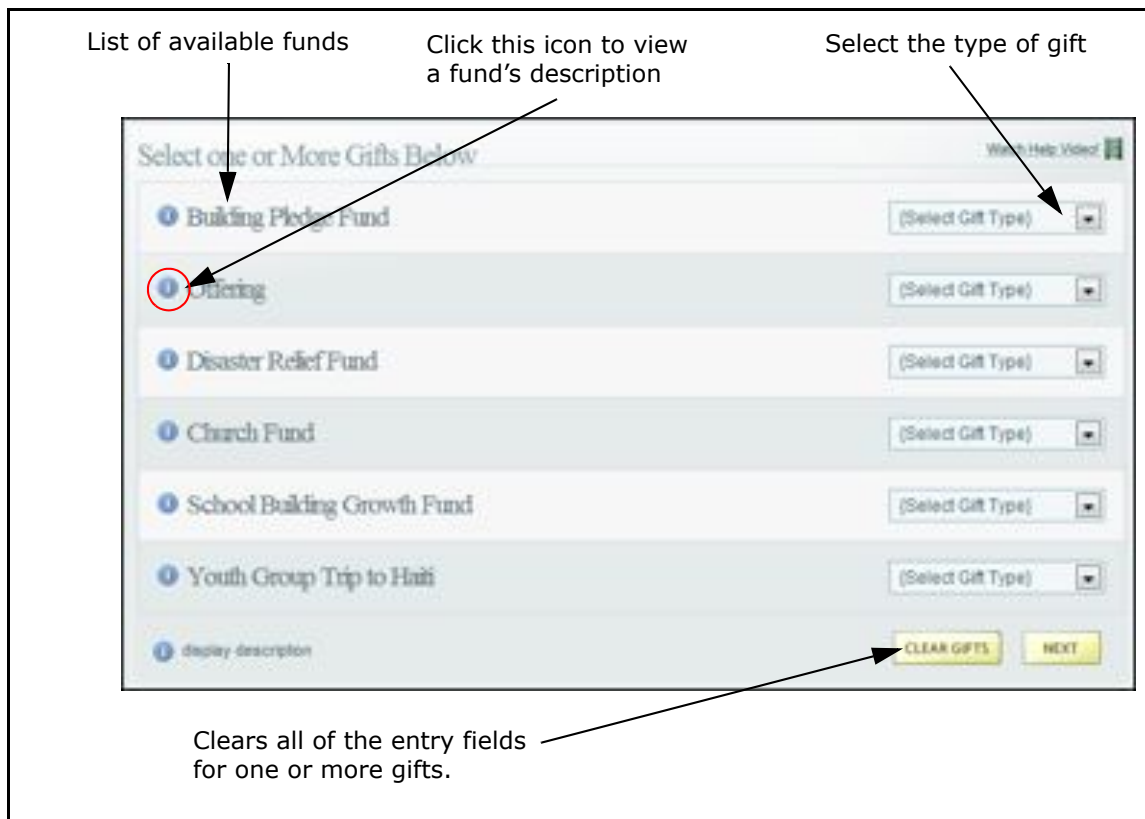


Figure 11. Funds Available for Gift Giving

Online Giving

User Guide for Donors

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

Note

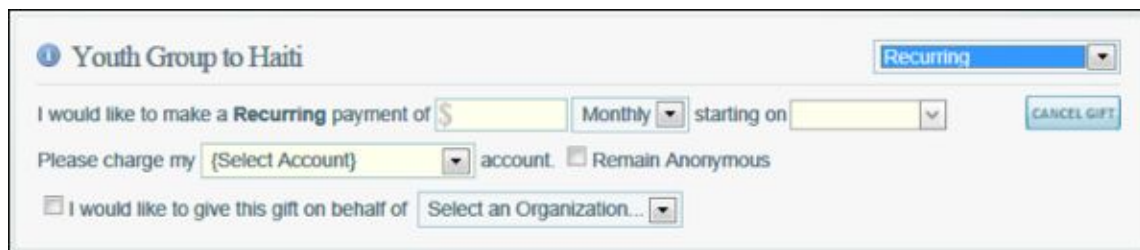
Not all gift types are available for all funds.

- Recurring:** a gift amount that is given at regular intervals (that is, monthly or yearly).
- Pledge:** a gift amount that is promised as a contribution. A pledge can consist of a one-time contribution or a down payment followed by recurring contributions until the promised amount is paid.
- One Time:** a gift amount that is given once only.

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

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

- If you selected **Recurring**, you see the following:



The screenshot shows a form for 'Youth Group to Haiti' with a 'Recurring' dropdown menu selected. The form includes fields for payment amount, frequency (Monthly), and start date, along with a 'CANCEL GIFT' button. Below these are checkboxes for 'Remain Anonymous' and 'I would like to give this gift on behalf of' with a dropdown menu for organization selection.

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

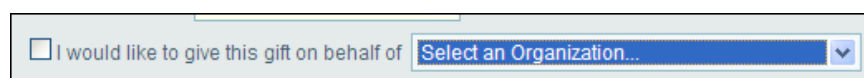
Note

*if your church accepts gifts on certain days of the week or month only, a message is displayed to let you know which days or dates are acceptable. Click **OK** to clear the message. Then, choose an acceptable day.*

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

- (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.



The close-up shows the checkbox 'I would like to give this gift on behalf of' and the dropdown menu 'Select an Organization...'.

- If you selected **Pledge**, you see the following:



The screenshot shows a web form titled "Youth Group to Haiti" with a "Pledge" dropdown menu selected. The form includes the following fields and options:

- A text input for the pledge amount, followed by a "starting on" date dropdown.
- A "CANCEL GIFT" button.
- A dropdown for "Please charge my" account, followed by another amount input and a "Monthly" frequency dropdown, with the text "until fulfilled" to the right.
- A text input for "I would like to make a down payment of" followed by a dropdown for "using my" account.
- A checkbox labeled "Remain Anonymous".
- A checkbox labeled "I would like to give this gift on behalf of" followed by a dropdown menu "Select an Organization...".

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

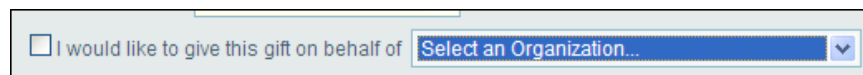
Note

if your church accepts gifts on certain days of the week or month only, a message is displayed to let you know which days or dates are acceptable. Click OK to clear the message. Then, choose an acceptable day.

- b. Select the account to charge (the accounts you set up in Step 1 as payment methods are listed in the box) and select the payment frequency (for example, **Monthly** or **Yearly**).
- c. If you want to make a downpayment, specify the amount of the payment and select the account to charge. This is a one-time payment that is processed on the current day.
- d. If desired, check the **Remain Anonymous** box.

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

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



This is a close-up of the dropdown menu mentioned in step e. It shows the text "I would like to give this gift on behalf of" followed by a dropdown menu with the text "Select an Organization..." and a downward arrow.

- If you selected **One Time**, you see the following:

- a. Specify the payment amount and the payment date.


Note

- b. *if your church accepts gifts on certain days of the week or month only, a message is displayed to let you know which days or dates are acceptable. Click OK to clear the message. Then, choose an acceptable day.* 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, check the box to give an additional gift of \$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.

When you are finished setting up all of your gifts, click . The **Confirm My Gifts** window is displayed. Do one of the following:

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

Note



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

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

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

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

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

7. If desired, click  to print a copy of your receipt or click  to return to your Home page.

What Happens If My Gift Payment Cannot Be Processed?

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

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

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

Note

Sage stores credit card and bank account information.

2. Call your bank or credit card company to report the problem and determine a possible cause.
3. If the problem cannot be identified and fixed by using Steps 1 and 2 above, contact your church office to report the issue.

Managing Your Payment Methods

This section shows you how to manage the payment methods associated with your online giving. You learn how to do the following:

- Change a payment method
- Delete a payment method that you no longer want to use
- Reinstate an expired credit card. and update one that is due to expire.

Note

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

Changing a Payment Method

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


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

The **Manage My Payment Methods** page (Figure 6 on page 13) is displayed.

2. Depending on the type of payment method you want to change, select the **My Credit Cards** or **My Bank Accounts** tab.
3. Select the **Edit** link and then update the account information as needed.

Note

See “Credit Card Account Fields” on page 17 if you have questions about required credit card information. See “Bank Account Fields” on page 18 if you have questions about required bank account information.

4. Click  to save your changes.

Your payment method is now changed.

Deleting a Payment Method

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

1. On your Home page or from the **Manage My Account** link, click **My Payment Methods** to display the **Manage My Payment Methods** page (Figure 6 on page 13).
2. Depending on the type of payment method you want to change, select the **My Credit Cards** or **My Bank Accounts** tab.
3. Select the **Delete** link.

A message requesting that you confirm the deletion is displayed.

4. 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.
 - 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 suspended. No further payments are made until you choose a new payment method for the gifts.

The system returns you to the **Manage My Payments** page (Figure 6).

Reinstating a Payment Method for a Failed Transaction

If a transaction fails due to the rejection of a payment method, you receive an email notifying you 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 and provides a link directing you to update your payment method and reactivate giving to those suspended gifts. To reinstate a payment method and reactivate giving, complete the following:

1. In the email you received, select the link to update your payment method and reactivate your gift giving.

You are directed to your church's Online Giving web site.

2. Log in to your account.

Your **Manage My Payment Methods** page (Figure 12) is displayed.



Figure 12. Manage My Payment Methods: Failed Payment Method

The payment method causing the failed transaction is displayed in red text. In Figure 12, the card named "visa" is causing the issue.

3. Do one of the following:
 - To update payment method that caused the failed transaction, click the **Edit** link. Update the details for the payment method. At the bottom of the window, type the code you see in the **Show another code** box. Finally, click .
 - To add a new payment method, click the **Add New Credit Card** or **Add New Bank Account** link. Enter the details for the payment method. At the bottom of the window, type the code you see in the **Show another code** box. Finally, click .

The **Reactivate Gifts** window opens. Any gifts that were suspended when the payment method failed are displayed. For example:

Reactivate	Gift Name	Gift Type	Frequency	Installment	Payment Method	Next Payment Date
<input type="checkbox"/>	Nancy's Basket	Recurring	Monthly	\$20.00	Discover - 5408	11/3/2012

Figure 13. Reactivate Gifts Window

For each suspended gift that you want to reactivate, do the following:

- a. Select the **Reactivate** checkbox.
- b. Select the payment method to use from the **Payment Method** list.
- c. Select the date on which to resume making payments.
- d. Click .

You return to the **Manage My Payment Methods** page. Your payment method is now updated with the new information you provided.

Payments to reactivated gifts will resume on the date you specified.

Changing Your Personal Information

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

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



The **My Personal Information** page (Figure 14) is displayed:

A screenshot of the "My Personal Information" page. The page title is "My Personal Information" with a "Watch Help Video" link. Below the title is the text "Here you can view/edit your personal information such as email address, phone number and password." The page is divided into three columns. The left column is titled "My Contact Information" and displays: Name: Karen Johnson, Envelope#: 100, Email: kjohnson1@pansheeoff.com, Phone: (734) 555-1212, and an "Edit Contact Information" link. The center column is titled "My Mailing Address" and displays: Address 1: 825 Victors Way, Address 2: (blank), City / State / Zip: Ann Arbor, MI 48103, and an "Edit Mailing Address" link. The right column is titled "Change My Password" and displays three password input fields: "Current Password:", "New Password:", and "Confirm New Password:", each with a red asterisk to its right. Below the fields is a "Save" button.

Figure 14. Viewing and Changing Your Personal Information

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

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

Note

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

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

Notes

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

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

Managing Your Contributions

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

Viewing Your Active Contributions

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



The **My Active Online Giving** page (Figure 15) is displayed.

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

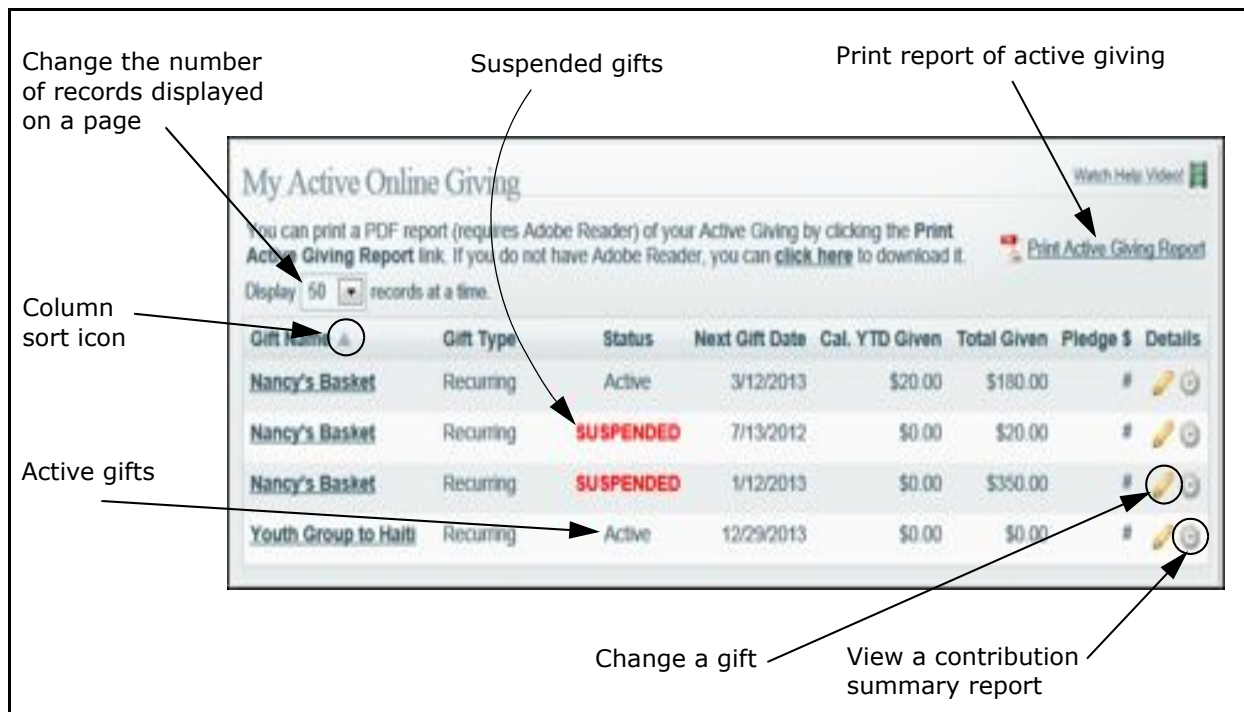


Figure 15. My Active Online Giving Page

Customizing the Display of Active Contribution Information

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

Sorting the Display of Your Contribution Records

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

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

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

Figure 15 shows an alphabetic sort in descending alphabetic order on the **Gift Name** column. However, if you have a long list of gifts and want to see when your next scheduled payment is, you may find it more useful to sort on the **Next Gift Date** column to view that information.

Changing the Number of Records on a Page


By default, 50 records are displayed on a page at one time. To change the number of records that you can view on a single page, select the desired option from the **Display** box (see Figure 15). Options range from 50 to 500 records per page.

Paging Through the List

The page buttons (see Figure 15) let you navigate quickly to specific pages in your list of active online giving. Simply click the desired page number button to display the gifts listed on that page.

Changing a Gift

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

1. Display the **My Active Online Giving** page (Figure 15).
2. Click  (Edit) for the gift you want to change.

Detailed information for the gift is displayed, as shown in Figure 16:



Certain fields cannot be edited

If a field can be edited, click in the box and type or select a new value.

Figure 16. Gift Details

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

Certain information cannot be changed. If a field is editable, you can click in the box and change the information. For example, for the gift shown in Figure 16, 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 fields. Then, click  to save.

Temporarily Stopping Payments for a Gift


You can temporarily stop or suspend future payments for a gift or pledge. Suspended gifts are not processed again until you indicate that you want payments to resume (see "Resuming Payments for a Suspended Gift" on page 33 for details on reinstating a suspended gift).

Note

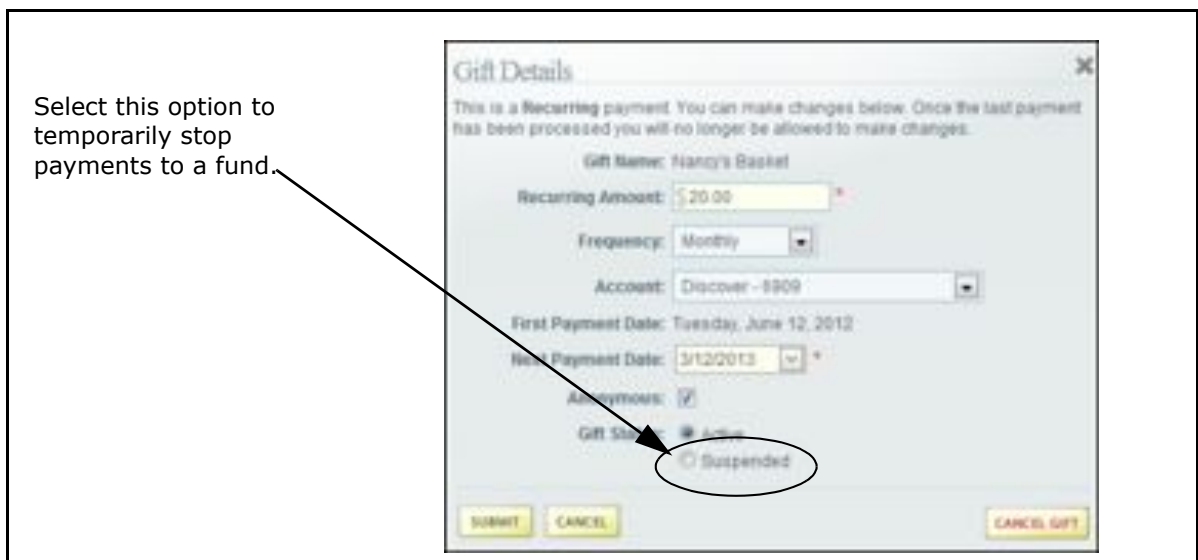
After you reinstate a suspended gift, you cannot make up past donations.


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

To suspend payments for a gift:

1. Display the **My Active Online Giving** page (Figure 15).
2. Click  (Edit) for the gift you want to suspend.

The details for the fund are displayed, for example:



3. Select the **Suspend** option.
4. Click 

The **My Active Online Giving** page (Figure 15 on page 30) is displayed. The gift's status changes to **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 or pledge, complete the following:

Note


After you reinstate a suspended gift, you cannot make up past donations

1. Display the **My Active Online Giving** page (Figure 15).
2. Click  (Edit) for the gift you want to resume payment for.
3. Uncheck the **Suspend** box.
4. Select your **Next Payment or Pledge Date**. Click  and then from the calendar, select the date when you want payments to resume.

Note



You cannot make up past donations for a suspended gift.

5. Click .

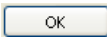

The **My Active Online Giving** page (Figure 15) is displayed. In the **Status** column for the gift, this icon is displayed to let you know that the gift is active: . Payment processing for the gift will resume on the **Next Gift Date**.

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. Display the **My Active Online Giving** page (Figure 15).
2. Click  (Edit) for the gift you want to suspend.
3. Click .

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

4. Do one of the following:
 - Click  to cancel the gift.
The gift is permanently removed from the Online Giving system.
 - Click  to exit without canceling the gift.

Viewing a Summary of Active Contributions

1. Display the **My Active Online Giving** page (Figure 15).
2. Click  (clock icon) for the gift you want to view.

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

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

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

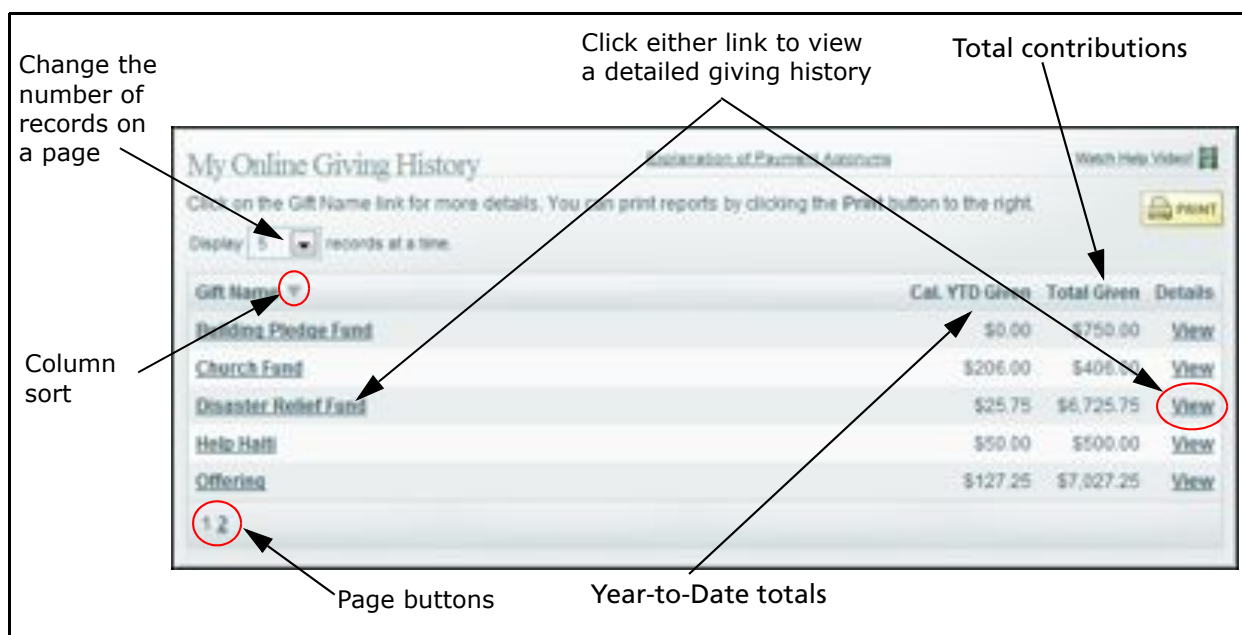
Viewing Your Giving History

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

1. On the Home page (Figure 4) or from the **Manage My Account** link, select **My Online Giving History**:



The **My Online Giving History** page (Figure 17) is displayed:



The screenshot shows the "My Online Giving History" page. At the top, there is a header with the title "My Online Giving History" and a "Print" button. Below the header, there is a "Display 5 records at a time" dropdown menu. The main content is a table with columns: "Gift Name", "Cal. YTD Given", "Total Given", and "Details". The table lists several gift categories: "Disasters/Disaster Fund", "Church Fund", "Disaster Relief Fund", "Help Haiti", and "Offering". The "Total Given" column shows values for each category. The "Details" column has "View" links for each row. Annotations with arrows point to various elements: "Change the number of records on a page" points to the "Display 5" dropdown; "Column sort" points to the "Gift Name" column header; "Click either link to view a detailed giving history" points to the "View" links in the "Details" column; "Total contributions" points to the "Total Given" column; "Page buttons" points to the "1 2" pagination controls at the bottom left; and "Year-to-Date totals" points to the "Cal. YTD Given" column.

Gift Name	Cal. YTD Given	Total Given	Details
Disasters/Disaster Fund	\$0.00	\$750.00	View
Church Fund	\$206.00	\$406.00	View
Disaster Relief Fund	\$25.75	\$6,725.75	View
Help Haiti	\$50.00	\$500.00	View
Offering	\$127.25	\$7,027.25	View

Figure 17. My Online Giving History Page

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

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

The giving history for the selected fund is displayed. For example, Figure 18 shows a giving history for the School Building Growth Fund.

Note

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



The screenshot shows a web interface for 'School Building Growth Fund History'. At the top, there is a title bar with a close button (X). Below the title, there is a 'Date Range' section with two date pickers: '1/1/2011' and '1/29/11', separated by 'to'. To the right of the date pickers is an 'Apply Filter' button and a link for 'Explanation of Payment Acronyms'. Further right is a 'PRINT' button with a printer icon. Below this is a table with the following columns: 'Payment Method', 'Type', 'Date', 'Amount', and 'Confirm #'. The table contains three rows of data, all in black text. Below the table, there is a red text note: 'Rejected contributions appear in red text. These are not reflected on your giving totals.'

Payment Method	Type	Date	Amount	Confirm #
Visa Card - 1111	Pledge	1/18/2011	\$50.00	A11BM0QbP0
Visa Card - 1111	Pledge	1/18/2011	\$515.00	A11BM0PbN0
Visa Card - 1111	Pledge	1/18/2011	\$100.00	C11BA6wCy0

Figure 18. Detailed Giving History for a Selected Fund

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

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

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

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

Customizing the Display of Giving History Information

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

Sorting the Display of Contribution Records

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

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

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

Figure 15 shows an alphabetic sort in descending alphabetic order on the **Gift Name** column. However, if you have a long list of gifts and want to see when your next scheduled payment is, you may find it more useful to sort on the **Next Gift Date** column to view that information.

Changing the Number of Records on a Page

By default, 50 records are displayed on a page. To change the number of records displayed on a single page, select the desired option from the **Display** box (see Figure 15). Options range from **5** to **500** records per page.


Paging Through the List

The page buttons (see Figure 15) let you navigate quickly to specific pages in the list. Simply click the desired page number button to display the gifts listed on that page.

Viewing and Printing Contribution Reports


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

Summary Report of Contributions to a Specific Fund

1. Display the **My Active Online Giving** page (Figure 15).
2. Click  (clock icon) for the gift you want to view.

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

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

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

A PDF of your report displayed. The PDF toolbar appears at the bottom of the window.

Note

If the toolbar does not display, move the mouse to the bottom right corner of the window, as shown in the following illustration.

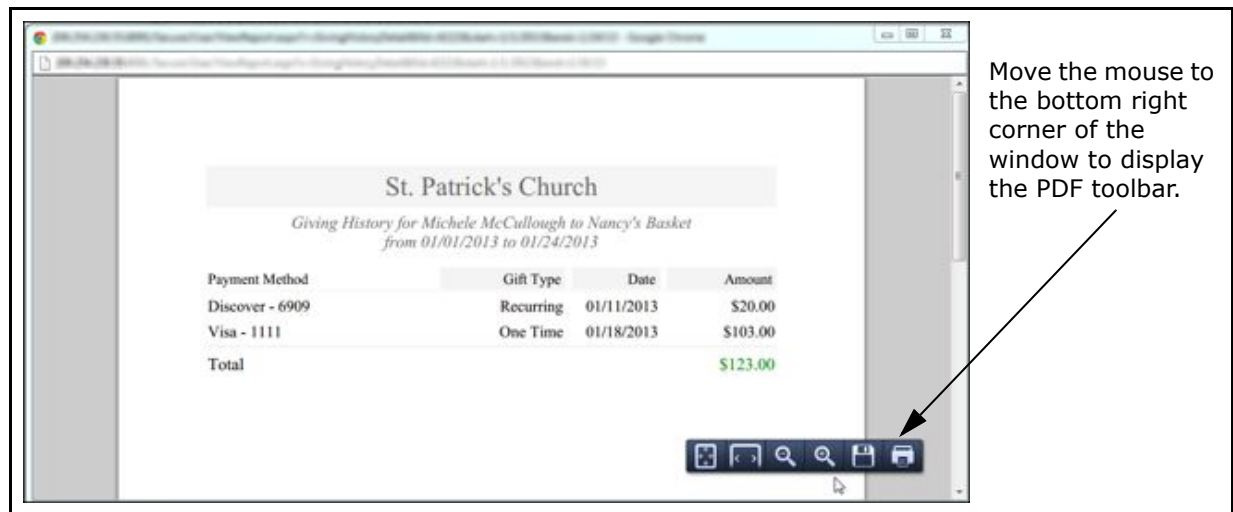




Figure 19. PDF Report Toolbar

Online Giving

User Guide for Donors

5. From the toolbar, do one of the following:



- Click  to print the report.
- Click  to save the report.

Active Giving Report

1. Display the **My Active Online Giving** page (Figure 15).
2. Select the **Print Active Giving Report** link.

A PDF of your report displayed. The PDF toolbar appears at the bottom of the window.

3. From the toolbar (see Figure 19), do one of the following:

- Click  to print the report.
- Click  to save the report.

Giving History Reports

Note

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

To print a report of your giving history:

1. Display the **My Online Giving History** page (Figure 17).

All of your contribution records are displayed.

2. Click  to display the **Print Online Giving History Report** window, as shown in Figure 20:



Figure 20. Print Online History Report Window





3. In the **Date Range** fields, click  and then use the calendar to select a date range for the report.
4. Select the type of report that you want to print:
 - **Summary Report:** displays a summary of contribution amounts for all gifts (see Figure 21).
 - **Full Detail Report (Tax Purposes):** displays detailed information for each contribution made during the date you specified in Step 3.
5. The **Only Show Tax Deductible Gifts** is checked by default. When, checked the report shows tax deductible contributions only. If desired, clear this box.
6. Click  .
A PDF of your report displayed. The PDF toolbar appears at the bottom of the window.
7. From the toolbar (see Figure 19), do one of the following:
 - Click  to print the report.
 - Click  to save the report.

Figure 21 shows an example of a summary report. This report shows the giver's total contributions made to each fund during the selected report period (January 1, 2010 to December 31, 2010), all-time contributions to each fund, and a grand total of contributions made to all funds.

Fund name	Giver's name	Contributions made to the fund during the report period	All-time contribution totals by fund
St. Patrick's Church			
<i>Giving History for Michele McCullough</i>			
		01/01/13 to 01/24/13	Total
Katrina Relief		\$0.00	\$1,763.00
Nancy's Basket		\$123.00	\$2,179.00
Youth Group to Haiti		\$0.00	\$0.00
Total		\$123.00	\$3,942.00

Figure 21. Summary Report of Total Contributions

Figure 22 shows a full detail report for all contributions given during the specified period (January 1, 2011 to December 31, 2010). This report includes tax deductible contributions only.

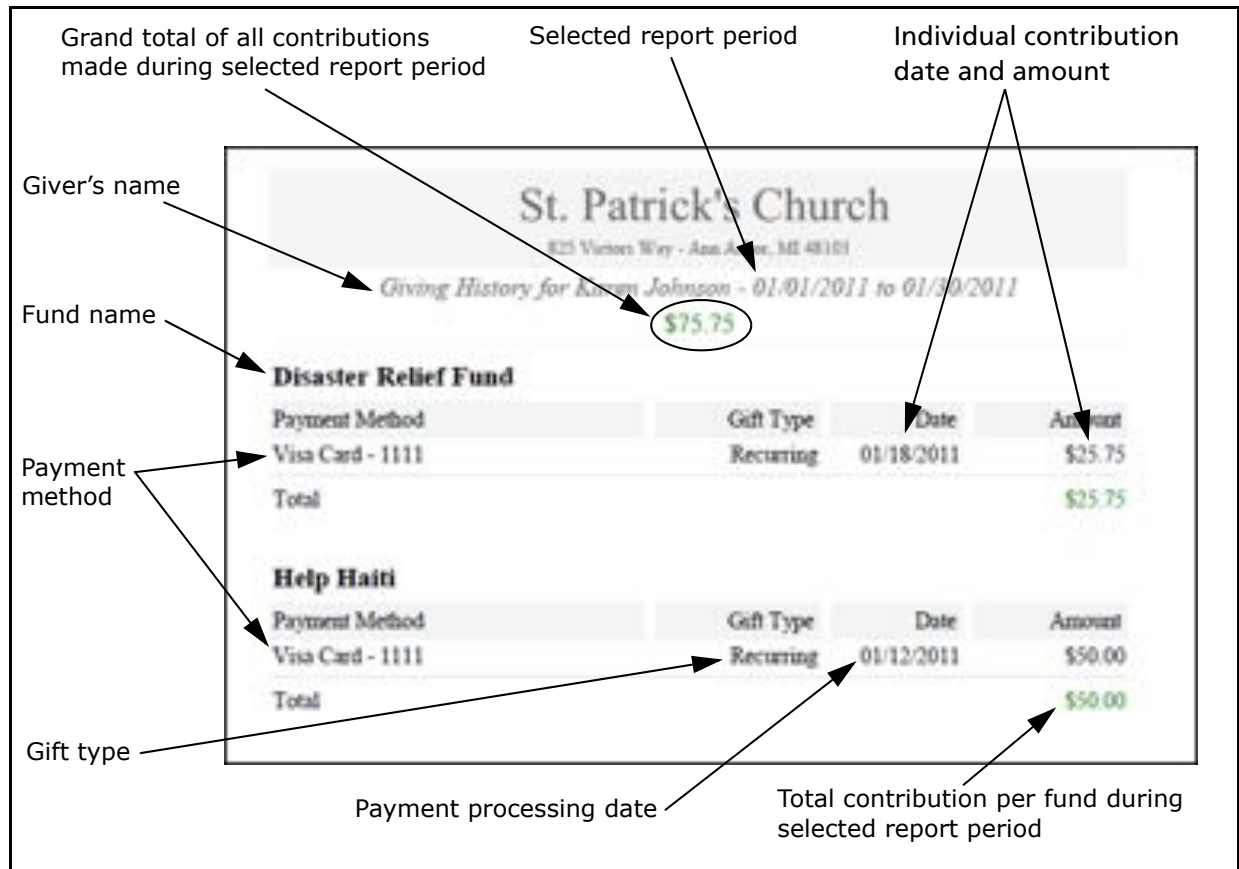


Figure 22. Full Detail Report (for Tax Purposes)


Contribution Details Report

1. Display the **My Online Giving History** page (Figure 17).
2. Select the link for the name of the gift. For example, Offering.

Contribution details for the gift are displayed:



Figure 23. Contribution Details



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

An updated report is displayed.

4. Click .

A PDF of your report displayed. The PDF toolbar appears at the bottom of the window.

5. From the toolbar (see Figure 19), do one of the following:

- Click  to print the report.
- Click  to save the report.

Retrieving Forgotten Login Credentials

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

What If I Forget My User ID?

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

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

The **Forgot your User ID?** window is displayed:




Figure 24. Forgot your User ID? Window

Online Giving

User Guide for Donors

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

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

What If I Forget My Password?

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

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

The **Forgot your Password?** window (Figure 25) is displayed:



Figure 25. Forgot Your Password? Window

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

After we validate your request, we will send an email containing a link to reset your password 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.

A

- Accepted credit cards, 17
- Account
 - changing, 24
 - contact information, supplying, 7
 - creating, 5
 - deleting, 25
 - logging into, 5
- Account number
 - locating, 15
 - requirements, 18
- Account Type field (for bank account), 18
- Active gifts icon, 30
- Active Giving Report, 38
- Address information, updating, 28
- Administrator-level access
 - registration code, 7
- Adobe Reader, 38
- Anonymous gifts, declaring, 20
- Asterisk, meaning of, 6

B

- Bank Account fields, 18
- Bookmarking your Online Giving website, 5

C

- Cancel Gift button, 33
- Cancelling a saved or active gift, 33
- CAPTCHA security code, 11
- Card Alias, 17
- Changing a gift, 31
- Clear Gifts button, 19
- Column headings, sorting data, 30, 36
- contact us information, 3
- Cookies requirement, 2
- Creating a user account, 5
- Credit Cards
 - accepted types, 17
 - billing address field, 17
 - card number requirements, 17
 - expiration date, 17
 - processing fee, offsetting, 22
 - required information, 17
- Customizing the display, 36

E

- Edit a Gift, 33
- Editing a gift, 31, 32
- Email address
 - updating your personal profile, 28
 - user account restrictions, 7

F

- Failed transaction, reinstating payments for, 26
- Firefox, 2
- Forgotten User ID or Password, 41–42

G

- Gifts
 - active gifts icon, 30
 - anonymous donations, 20
 - cancelling, 33
 - changing, 31
 - editing, 31
 - history of contributions, 34
 - managing contributions, 29
 - one-time contribution, 20
 - pledges, 20
 - Quick Give contributions, 9
 - recurring contributions, 20
 - rejected contributions, 35
 - resuming suspended gift payments, 33
 - special instructions for one-time gifts, 22
 - suspended gifts icon, 30
 - types of, 20
- Giving History Report, 38
- Google Chrome, 2

H

- Help, getting, 3

I

- Icons
 - active gifts, 30
 - calendar, 39
 - clock, 34
 - edit (change) a gift, 31
 - suspended gifts, 30
- Internet Explorer, 2

J

JavaScript system requirements, 2

L

Logging out of your account, 9
Lost or forgotten User ID/password, 41–42

M

Memorial gift instructions (One Time gifts), 22

N

New account, creating, 5

O

Offering, see Gifts (types of)
One Time gifts, 22
Online Giving
 advantages, 1–2
 features, 1
 getting Help, 3
 logging out of you account, 9
 making a contribution, ??–23
 security, 2
 system requirements, 2
 technical support, 3
 video Help, 3
 website, bookmarking, 5
Only Show Tax Deductible Gifts option, 39

P

Page buttons, 31, 36
Password
 changing, 29
 entering, 8
 length and character restrictions, 7
 lost or forgotten, retrieving, 42
 security recommendations, 2
 validation email, 6
Passwords
 length and character restrictions, 7
Payment Methods
 changing, 24
 processing issues, resolving, 23
 reinstating, 26
Payments
 cancelling future transactions, 33
 changing amounts and frequency, 31
 resuming, 33
 stopping temporarily, 32
Phone numbers
 account holder, entering, 7

Pledges, 21
Popup blocker requirement, 2
Printing reports, 37–41

Q

Quick Give contribution, making, 9

R

Records
 changing the number displayed, 31, 36
 sorting, 30, 36
Recurring gifts, 20
Registering for a user account, 5
Registration Code, 7
Reinstating a payment method, 26
Reports
 Adobe Reader requirement, 38
 contribution details, 40
 contribution history, viewing, 34
 contribution summaries, 37
 giving history, 38
 Page buttons, 36
 printing, 37–40
 sorting records, 36
Routing number
 locating, 15
 requirements, 18

S

Safari, 2
Sage Pay terms and definitions, viewing, 18
Secure Sockets Layer, 2
Security code, 11
Security Statement, 2
Signing up for new account, 5
Sorting records, 30, 36
Status of gifts (active vs. suspended), 33
Summary Report of Contributions to a Specific Fund, 37
Suspended gifts, 30
System requirements, 2

U

User account
 benefits, 3
 creating, 5
User ID
 entering, 8
 length and character restrictions, 7
 lost or forgotten, retrieving, 41
 validation email, 6

V

Verification security code, 11

Video help, displaying, 3

W

Web browser compatibility, 2

Welcome page, 4