

for Church Members



Online Giving

USER GUIDE



OurSundayVisitor, Inc.

Offering Envelope Division



ParishSOFT
Connecting People and the Church



PARTNERS IN TECHNOLOGY

Online Giving User Guide

for Church Members

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CONTENTS

Getting Started	4
<i>Introduction to Online Giving</i>	5
Advantages for Members.....	5
Reporting	5
System Requirements.....	5
Help for Website Users	5
<i>Open Your Church's Online Giving Website</i>	6
<i>Sign Up for a New Account</i>	7
Fields Required for New Accounts	8
Login Information.....	8
Personal Information	8
Address Information	8
Forgot User ID	9
Forgot Password.....	9
<i>Navigation from the Home Page</i>	10
<i>Online Giving Security Statement</i>	11
Give Online	12
<i>Online Giving: Quick Setup</i>	13
<i>My Payment Methods</i>	14
Bank Account Fields	15
Credit/Debit Card Fields.....	15
Change My Payment Methods	17
Delete My Account Information.....	17
<i>My Personal Information</i>	18
OSV Prayerful Content Subscription	18
Envelope Number Field Locked.....	18
<i>Give a New Gift</i>	19
If Donation Cannot Be Processed	21
Clear Gift Information.....	21
Anonymous Donations.....	21
<i>Manage My Gifts</i>	22
Change a Gift.....	22
Suspend a Gift	23
Cancel a Gift	23
View History	24
Reports and Sorting	25
<i>My Online Giving History</i>	26
Get My Total Contributions for All Gifts	27
Get My Contribution Totals for a Specific Gift.....	28
<i>My Active Online Giving</i>	29
<i>Sort List Views</i>	30
<i>Index</i>	31

GETTING STARTED

Introduction to Online Giving

ParishSOFT's Online Giving brings you a powerful, simple way to manage your church contributions electronically in a safe, easy-to-use Web environment.

Advantages for Members

Online Giving offers many benefits to you and your family.

- Safe, secure system lets you make and keep stewardship commitments without checks, pledge cards, or calls to the church office.
- 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.

Online Giving also saves your church money, so while your electronic contributions help to fund your church ministries with predictable income, you'll also be helping to reduce administrative, envelope, and mailing costs.

Reporting

Online Giving provides 24/7 access to reports, so it's easy to check on your contribution totals at tax time—or any time—without having to call your church office.


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's needed is an Internet connection and Web browser, including Microsoft® Internet Explorer 6.0+, Firefox 2.0+, Safari 3.0+ or Google Chrome.

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 may block access (e.g., Norton, McAfee, Google toolbar).

Help for Website Users

Your church's Online Giving website is designed to be easy to use. If you have a question, short videos are available at many places throughout the system – just click on the video icon to get instant help.

[Watch Help Video!](#) 

This guide documents the features and functionality of the Online Giving application using simple, task-based examples to illustrate how to use the tools available from your church's website.


The examples shown in this document use demonstration data and do not represent the actual records of any church or parent organization.

Open Your Church's Online Giving Website

Your church's Online Giving website is available from any web browser. A valid login is required to set up or view your online giving. If you do not already have an account, you may create one by clicking **Sign Up for a New Account**.

The login is a necessary security protocol that protects your account information.

Complete the following steps to open the website and log in:

1. Open your web browser application (e.g., Microsoft Internet Explorer, Mozilla Firefox, etc.).
2. Go to your church's website and select the link (e.g., Online Giving, Gifts, or something similar), or enter your church's Online Giving http address in your browser's Address line.

3. Add the website to your list of frequently visited sites. Firefox users can click **Bookmarks** > **Bookmark this Page**; Internet Explorer users can click **Favorites** > **Add to Favorites**.

4. Enter your **User ID** and **Password** and click the **Login** button. Both User ID and Password are case-sensitive.



The website will open to your church's Online Giving page, similar to the example shown below for All Saints Parish (a demonstration website).

If you do not have a login, [Sign Up for a New Account](#) using the procedure on the next page.



Sign Up for a New Account

To create an account (i.e., login), complete the following steps:

1. Click the **Sign up for a New Account** link.

Existing User Login

User ID:

Password:

Forgot **User ID** or **Password**?
[Sign up for a New Account](#)

2. Complete the fields on the form. The User ID requires between 6–12 total alpha and numeric characters (e.g., giver123). The Password requires alpha, numeric, and at least one keyboard character, such as an exclamation point or asterisk (e.g., giving43!). Both fields are case sensitive. No Registration Code is needed—this field is just for your church’s administrators.

Descriptions and requirements for these fields are provided on page 8.

3. Click **Submit**. Once we validate the request, we’ll send you an email containing your User ID and Password, as well as the address for your church’s Online Giving website.

To: [redacted]
 From: [redacted]
 Subject: Welcome to Online Giving!

Thank you for creating a new Online Giving Account. To confirm your new Account, please click the following link:
<http://198.87.234.68:8080/Confirm.aspx?cid=34&uid=karen5>

Once confirmed, you may log into your Account using the following User ID and Password:

User ID: giving04
 Password: giving43!

Thank you,
 St Karen
 email address

New User Account Registration

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. Once submitted, you will receive an email containing a link that you must click in order to activate your account. Once you have successfully validated your email address you may then login.

Login Information	Personal Information	Address Information
User ID: (6-12 characters) * <input type="text" value="giver123"/>	First Name: * <input type="text" value="Elizabeth"/>	Address 1: * <input type="text" value="825 Victors Way"/>
Password: (8-16 characters) * <input type="password" value="....."/>	Last Name: * <input type="text" value="Abbey"/>	Address 2: <input type="text"/>
Confirm Password: * <input type="password" value="....."/>	Email Address: * <input type="text" value="abbey@allsaintsparish.com"/>	City/State: * <input type="text" value="Ann Arbor"/> <input type="text" value="MI"/>
Registration Code: <input type="text"/>	Phone # <input type="text" value="7342051000"/>	Zip: * <input type="text" value="48108"/> <input type="text" value="2830"/>

Uncheck if you do not want to receive Prayerful content from OSV

Fields Required for New Accounts

Login Information

User ID*

Required. Case sensitive. Your User ID must contain both alpha and numeric characters and be between 6–12 characters in length (e.g., giver123).

Password*

Required. Case sensitive. For security reasons, your Password must include at least one of each of the following characters: alpha, numeric, and a keyboard character such as ampersand, exclamation point, or asterisk (e.g., giving43!).

Confirm Password*

Required. Case sensitive. Enter your password exactly as you did in the **Password** field.

Registration Code

Church members can ignore this field — the Registration Code is for church administrators only.

Personal Information

First Name* and 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

Not required.

Subscribe

Uncheck if you do not want to receive Prayerful content from OSV

This box will be checked by default to give you a subscription to Prayerful content from Our Sunday Visitor (OSV). If you prefer not to receive Prayerful content, uncheck the box.

Forgot User ID

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

1. Click the **User ID** link.



Existing User Login

User ID:

Password:

Forgot **User ID** or Password?
[Sign up for a New Account](#)

2. Enter your complete **Email** address.



Forgot your User ID? Enter your Email Address Below.

Enter your Email Address in the textbox below. If your email address is found in the system your User ID will be sent.

Email:

3. Click **Submit**.

Once we validate your request, an email containing a reminder of your User ID will be sent to the address in your account profile. Note that for security reasons, we do not provide your password in this email.

Forgot Password

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

1. Click the **Password** link.



Existing User Login

User ID:

Password:

Forgot User ID or **Password**?
[Sign up for a New Account](#)

2. Enter your **User ID**.



Forgot your Password? Enter your User ID Below.

Enter your User ID in the textbox below. Your password will be sent to the email address on file.

User ID:

3. Click **Submit**.

Once we validate your request, an email containing a Password reminder will be sent to the address in your account profile. Note that for security reasons, we do not provide the User ID in the password reminder email.

Navigation from the Home Page

When you log in to your church's Online Giving website, the home page will be displayed. The items on the home page are indicated below and will be described in more detail in the remainder of this document.

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

Contact Us Your church can provide email, phone and address information here to help you connect quickly with your church office.

Your login name and **Sign Out** option display in the Welcome area.

Name of your church

Manage My Account offers 5 icon-marked links to let you give online, manage your personal information or payment methods, and view your active or historical online giving information.

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

My Recent Giving shows the last contribution made to all of the funds you have selected for Online Giving.

The screenshot shows the following content:

- Church of Demonstrations logo and Online Giving logo
- Navigation menu: Manage My Account, About Online Giving, Online Giving FAQ, Contact Us
- Welcome message: Welcome, Karen Johnson - Sign Out
- Main heading: Karens Online Giving Home
- Five icon-marked links under "Manage My Account":
 - Give a New Gift (View a list of Gifts that you can give to)
 - My Personal Information (View / Edit My Personal Information such as Name and Email Address.)
 - My Payment Methods (Add / Edit Payment Methods such as a Credit Card and Bank Account.)
 - My Online Giving History (View a detailed History of your past Online Giving.)
 - My Active Online Giving (View / Edit Gifts that you are actively Giving to, such as a Pledge.)
- My Giving Snapshot:
 - Total Given: \$1,300.00
 - YTD: \$1,300.00
- My Recent Giving:

School Building Growth Fund	\$200.00 - 4/17/2009
Building Pledge Fund	\$300.00 - 3/27/2009
Disaster Relief Fund	\$50.00 - 3/23/2009
Disaster Relief Fund	\$300.00 - 3/18/2009
Church Fund	\$200.00 - 3/18/2009

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Online Giving Security Statement

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.

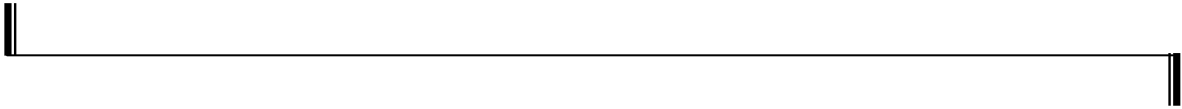
To ensure that no one gains unauthorized access to your account, the Online Giving website uses a time-out feature to log you off if you are inactive for a specific amount of time. This help to protect your account in the event you leave your computer unattended.

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).
- Logout and close the browser window when you are done.
- Use antivirus software that is updated on a regular basis.

GIVE ONLINE



Online Giving: Quick Setup

Six simple steps for setting up an online contribution to your church are provided below. Detailed instructions for each step are provided later in this chapter.

The system will send an automated transaction confirmation to the email address in your account profile. If your email address has changed, click **My Personal Information** and update it before you set up a gift.

You will receive an email confirmation of your online giving activity.

Transactions will be processed automatically on the date that you have specified, transferring money from the account of your choice directly into your church's bank account.

1. Click **My Payment Methods** and add your account information for a debit/credit card, checking, or savings account.



2. Click **Give a New Gift**.



3. **Select Gift Type** for the fund of your choice, specify the amount, payment frequency, start date, and account.

4. Click **Next**.

5. Confirm your donation details and click **Submit**.

6. The screen *Your Donation(s) Have Been Processed* will display your donation details. Click **Print** if desired, or click **Finish** to exit the screen.

My Payment Methods

Before you give a gift or make a pledge to a church fund, you'll want to enter the account information for the credit card, checking, or savings account from which your contribution will be transferred.

Complete the following steps to set up a payment method for your online giving.

1. Click **My Payment Methods**.



2. Click either **Add New Credit/Debit Card** or **Add New Bank Account**. Your church chooses which payment options display here, so your options may vary slightly from the screen example shown below.

3. Enter the account information and click **Submit**. Required fields are designated with a red asterisk. The system will validate all account information for compliance with industry standards and notify you if any account information is incorrect.

Bank Account and Credit/Card fields are described on the following page.

Any accounts set up for online giving will also display on this screen — click the **My Credit/Debit Cards** or **My Bank Accounts** tab to view your account information. Use the **Edit** and **Delete** links to change or remove account information from the website.

 A screenshot of the "Manage My Payment Methods" web interface. The main area has two tabs: "My Credit/Debit Cards" (selected) and "My Bank Accounts". Below the tabs is a table with the following data:

Card Name	Card Number	Exp. Date	Edit Card
Visa Card	...1111	01/2018	Edit / Delete

 A yellow warning banner above the table says "Row with card Expired/expiring in 30 days". To the right is a sidebar titled "Add New Method" with two options: "Add New Credit / Debit Card" and "Add New Bank Account". Below these options is a note: "Here you can add new payment methods to use when you give to your church online. Your information is stored on our secure servers and your privacy will never be compromised." An arrow points from the text in the previous block to the "Add New Method" sidebar.

Bank Account Fields

Bank Account Name*

Required. Enter the name of the banking institution for your account.

Account Type

Choose either Checking or Savings. Checking is the default.

Account Number*

Required. Account numbers must contain from 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: 0, 1, 2 or 3. No spaces, special characters, or alphabetic characters are permitted.

Submit

Saves your account information in the system.

Cancel

Exits the screen without saving any information entered in the data fields on this screen.

Credit/Debit Card Fields

Accepted Cards

Your church accepts the cards shown.

Card Alias*

Required. Enter a description to help you identify the card you are using (e.g., LL Bean Visa, Mastercard with Joe's picture).

Card Number*

Required. Enter your complete card number with no spaces, special, or alphabetic characters. Visa or Mastercard account numbers require 16 digits. Visa account numbers begin with the number 4 and Mastercard with 5. American Express account numbers require 15 digits.

Expiration Date*

Required. Select the month and year from the lookup tables.

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. During credit or debit card processing, your account information will be verified with your billing address.

Phone Number*

Required. Enter your phone number.

Address Line 1*

Required. Enter the first line of the address on file with your credit/debit card company.

Address Line 2

If applicable, enter the second address line on file with your credit/debit card company.

City*

Required. Enter the city on file with your credit/debit card company.

State*

Required. Select the state on file with your credit/debit card company.

ZIP*

Required. Enter the ZIP Code on file with your credit/debit card company.

Submit

Saves your account information in the system.

Cancel

Exits the screen without saving any information entered in the data fields on this screen.



The screenshot shows a web form titled "Billing Address" with a close button (X) in the top right corner. The form contains the following fields:

- Phone Number: 7342051000 *
- Address Line 1: 825 Victors Way *
- Address Line 2: (empty)
- City: Ann Arbor *
- State: MI (dropdown menu) *
- Zip: 48108 *

At the bottom of the form are two buttons: "SUBMIT" and "CANCEL".

Change My Payment Methods

You can change your payment methods at any time to prevent future scheduled payments from being processed on a particular account.

1. Click **My Payment Methods**.



2. Click **Edit**.

3. Update the account information as needed and click **Submit**.

Delete My Account Information

When you delete a payment method, your account will be completely removed from the system. If you have active gifts scheduled for payment using the account, the system will ask you to designate another account for payment of those gifts. To suspend or cancel a gift, please see page 23.

1. Click **My Payment Methods**.



2. Click **Delete**.



3. If you have payments scheduled using the selected account, the gifts will be listed for you.

4. *Do you wish to continue these gift payments?*

a. If yes, check the **Yes**, **replace with:** box, and select a new account for payment of these gifts from the lookup table.

b. If no, **leave the Yes box unchecked and click Submit**. Gifts that were scheduled for payment by this account will be **Suspended**. No further payments will occur until you choose a new payment method for these gifts.

5. Click **Submit** (or click **Cancel** to avoid deleting). The system will return you to the *Manage My Payments* screen, where your deleted account will no longer display.

My Personal Information

Under **My Personal Information**, you can update your contact information, email, or mailing address; or change your password.

1. Click **My Personal Information**.



2. Your name, envelope number, email address, subscription status to Prayerful content from OSV, and phone display under **My Contact Information** on the left.

Your address, city, state, and ZIP Code display under **My Mailing Address** in the middle.

To update, click either **Edit Contact Information** or **Edit Mailing Address**. Update the information as needed and click **Submit** to save.

3. To change your password, enter your **Current Password**, enter your **New Password** (6-12 alphanumeric characters, including a number and a keyboard character, such as an exclamation point), then enter the new password again in the **Confirm New Password** field.

OSV Prayerful Content Subscription

When you created your Online Giving account, you accepted or declined a subscription to Prayerful content from Our Sunday Visitor (OSV). If you are receiving Prayerful content and wish to unsubscribe, click **Edit Contact Information** and uncheck the **Subscription** box. *False* means not subscribed; *true* means subscribed.

4. Click **Save**.

Envelope Number Field Locked

If your church staff have validated your envelope number, the system will not allow you to edit this field.

Give a New Gift

From the Online Giving website, it's easy to make an online contribution or pledge to your church.

1. Click Give a New Gift.



Funds available for Online Giving will display.

2. Select Gift Type for the fund of your choice. Your church determines the options available to you for each fund, and those options may include: Regular Offering, Pledge, and One-Time Gift.


- a. Regular Offering—for recurring contributions
- b. Pledge—a fixed total amount to be paid in installments over a set timeframe, with or without a down payment

c. One-Time Gift—a non-recurring contribution

3. How much to you wish to give?

Enter the dollar amount of your contribution in the \$ field.

4. When would you like to pay?

Today's date defaults into this field. Click the  calendar icon to choose a different date. For a recurring, regular offering or pledge, this is the date of your first scheduled electronic payment. For one-time gifts, this is the one and only date for electronic payment processing.

5. Which account would you like to use for payment? Choose from the accounts that you have added to the system. TIP: For pledges, you may use separate accounts for your down payment and regular scheduled pledge payments.

6. How often do you wish to make contributions? If your gift is a Regular Offering or a Pledge, choose a payment frequency (not required for one-time gifts). Your church

The screenshot shows three gift options, each with a form:

- Offering:** Regular Offering of \$150.00, Monthly, starting on 6/7/2009. Payment account: Visa Card - 1111.
- Disaster Relief Fund:** One Time Gift of \$150, on 4/28/09. Payment account: Chase Checking - 7890.
- School Building Growth Fund:** Pledge of \$2500, starting on 6/15/2009, Quarterly until fulfilled. Payment account: Visa Card - 1111. Down payment of \$250 using Catholic Credit Union - 1234.

Buttons at the bottom include 'display description', 'Click Here for Gift Type Help', 'CLEAR GIFTS', and 'NEXT'.

Payment Options will vary slightly depending on the selected Gift Type.

Gift Types include Regular Offering, Pledge, and One-Time Gift.

determines the options available in this list, and those options may include: Weekly, Monthly, 2x/year, 2x/month, Yearly, and Quarterly.

7. *Do you wish to make a down payment with your pledge (not required for one-time gifts or regular offering)?* Enter the down payment amount and select an account. Down payments will be processed today and will be applied toward your total pledge amount.
8. Click **Next**, review your donation details—click the **Back** button if you need to make changes.
9. Click **Submit to process the scheduled payment**.

Click **Print** if desired, or click **Finish** to exit the screen.

The system will send an automated receipt to the email address on file for your user account.

Transactions will be processed automatically on the date that you have specified, transferring money from the account of your choice directly into your church's bank account.

The screen: *Your Donation(s) Have Been Processed* will display the details of your donation.

If Donation Cannot Be Processed

In the event that your donation cannot be processed, you will receive an email notifying you of the issue. The most likely cause for a processing failure is an expired account or incorrect digit in an account number. To correct the situation, please take the following steps in the order listed:

1. Verify your card or bank account information in the Online Giving system (under **My Payment Methods**).
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 through items 1 and 2 above, contact your church office to report the issue.

Clear Gift Information

If you enter new gift information but then change your mind, you can clear all of the fields by clicking the **Clear Gifts** button.

CLEAR GIFTS

The system will ask you to confirm—click **OK** to remove any information from the new gift fields on the screen.



The **Clear Gifts** button does not affect any active Online Giving that you have set up (see *Manage My Gifts*, on page 22 for information on editing existing gifts).

Anonymous Donations

If you wish to make an anonymous donation, select “I would **like** to remain anonymous” in your gift details.

 A screenshot of an online giving form for a "Disaster Relief Fund". The form includes a "One Time Gift" section with a text box containing "\$5000" and a date field containing "5/20/09". Below this is a payment method section with a dropdown menu set to "Please charge my Visa Card - 1111" and another dropdown menu set to "I would like" with a downward arrow. The text "to remain anonymous." follows. A "One T" button is visible in the top right corner.

The church will not be given your name as a benefactor for any gifts with this setting.

Anonymous donations will show up in your personal giving reports that are available to you (via your secure login) from the Online Giving website.

Manage My Gifts

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

You can also suspend or completely cancel a gift, view your giving history, or print a PDF report of your active Online Giving.

Change a Gift

1. **Click My Active Online Giving.**



A list of your active Online Giving will display.

2. Click **Edit** to open the gift details. The details screen shows the current amounts, payment frequency, accounts, dates, etc., and it lists what fields can and cannot be changed for the selected gift. For example, a pledge down payment amount cannot be changed after the transaction has been processed.

Gift Name	Gift Type	Status	Next Gift Date	Cat. YTD Given	Total Given	Details
Building Pledge Fund	Pledge	●	3/27/2009	\$300.00	\$300.00	Edit / History
Building Pledge Fund	Pledge	●	3/18/2009	\$200.00	\$200.00	Edit / History
Church Fund	Regular Offering	●	3/18/2009	\$0.00	\$0.00	Edit / History
Disaster Relief Fund	One Time Gift	●	3/31/2009	\$0.00	\$0.00	Edit / History
Offering	Regular Offering	●	4/1/2009	\$0.00	\$0.00	Edit / History

3. To make a change, click in the desired field, edit, and click **Submit**.

Building Pledge Fund

This is a **Pledge** Gift. You can make changes below. Once the last payment has been processed you will no longer be allowed to make changes. Once the down payment has been processed you will not be allowed to make changes.

Pledge Amount: 1500.00 *

Account: Chase Checking - 7890

Freq. Amount: 100.00 *

Frequency: Monthly

First Pledge Date: Friday, March 27, 2009

Next Pledge Date: 3/27/09 *

Down Payment: 300.00

Account: Visa Card - 1111

Privacy: Public



Suspended:

SUBMIT CANCEL CANCEL GIFT

Suspend a Gift

Suspending a gift lets you temporarily stop future scheduled Online Giving payments. When you suspend a gift, payments will not be processed until you uncheck the **Suspended** box.

When you suspend a gift, payments are stopped only for the selected gift—if you have other Online Giving gifts in the system that you wish to place on hold, you must suspend each of them individually.

- To suspend a gift, check the **Suspended** box—this stops Online Giving payment processing for the selected gift.
- To resume Online Giving payment processing, uncheck the **Suspended** box, and adjust the **Next Gift Date**. Payment processing for the selected gift will resume as scheduled.
- Your *Active Online Giving* screen will indicate which gifts are active. Under the **Status** column, gifts marked with a green circle  are active. Gifts marked with a red circle  have been suspended (i.e., giving has been placed on hold).

Church of Demonstrations 

Manage My Account | About Online Giving | Online Giving FAQ | Contact Us | Welcome, Karen Johnson - Sign Out

My Active Online Giving Watch Help Video!

View funds that you're currently giving to. You can print a PDF report of your Active Giving by clicking the print button. 

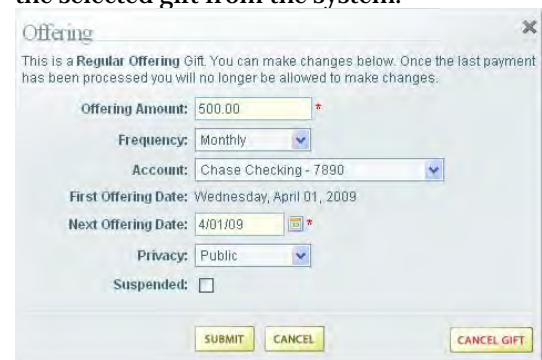
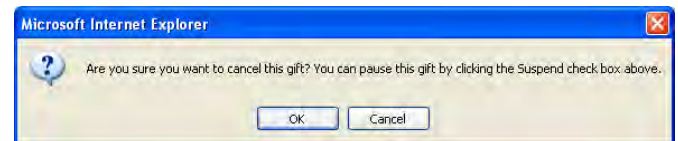
Gift Name	Gift Type	Status	Next Gift Date	Cal. YTD Given	Total Given	Details
Building Pledge Fund	Pledge		3/27/2009	\$300.00	\$300.00	Edit / History
Building Pledge Fund	Pledge		3/18/2009	\$200.00	\$200.00	Edit / History
Church Fund	Regular Offering		3/18/2009	\$0.00	\$0.00	Edit / History
Disaster Relief Fund	One Time Gift		3/31/2009	\$0.00	\$0.00	Edit / History
Offering	Regular Offering		4/1/2009	\$0.00	\$0.00	Edit / History

Cancel a Gift

Cancelling a gift stops future gifts. The history of any prior gifts will be retained in the system for reporting purposes.

Like the “Suspend” feature, cancel removes just the selected gift from the system.

- To cancel a gift, click the **Cancel Gift** button, and click **OK** to confirm—this permanently removes the selected gift from the system.

View History

My Active Online Giving offers a **History** link for each active gift in the system.

Click this link to view your giving history for any individual gift.

The Date Range for any giving history will default to January 1 of the current year to today's date. Click the calendar icons to choose a different date range and click **Apply** to refresh the view.

To print a report, click the **Print** button.

Church of Demonstrations Online Giving

Manage My Account | About Online Giving - Online Giving FAQ - Contact Us | Welcome, Karen Johnson - Sign Out

My Active Online Giving Watch Help Video!

View funds that you're currently giving to. You can print a PDF report of your Active Giving by clicking the print button. **PRINT**

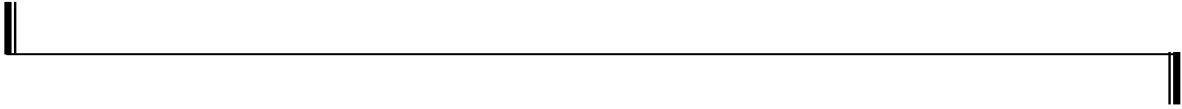
Gift Name	Gift Type	Status	Next Gift Date	Cal. YTD Given	Total Given	Details
Building Pledge Fund	Pledge	●	3/27/2009	\$300.00	\$300.00	Edit / History
Building Pledge Fund	Pledge	●	3/18/2009	\$200.00	\$200.00	Edit / History
Church Fund	Regular Offering	●	3/18/2009	\$0.00	\$0.00	Edit / History
Disaster Relief Fund	One Time Gift	●	3/31/2009	\$0.00	\$0.00	Edit / History
Offering	Regular Offering	●	4/1/2009	\$0.00	\$0.00	Edit / History

Building Pledge Fund Summary ✕

Date Range: 1/1/2009 to 4/29/09 **Apply** **PRINT**

Payment Method	Type	Date	Amount	Confirm #
Visa Card - 1111	Pledge	3/27/2009	\$300.00	C3R9E5Nbf0
Visa Card - 1111	Pledge	3/18/2009	\$200.00	B3I9Ay3dJ0
Visa Card - 1111	One Time Gift	3/18/2009	\$50.00	B3I9AguZF0

REPORTS AND SORTING



My Online Giving History

My Online Giving History offers a summarized view of your total payments for each gift, as well as summary and detailed statements that document your year-to-date contributions for all gifts.

Click the **Print** button to view or print a report of your total contributions for the year or by any date range (see page 27).

Click either the **View** link or the **Gift Name** link to view or print a report of your individual gift payments.



My Online Giving History
View a detailed History of your past Online Giving.

My Online Giving History Watch Help Video!

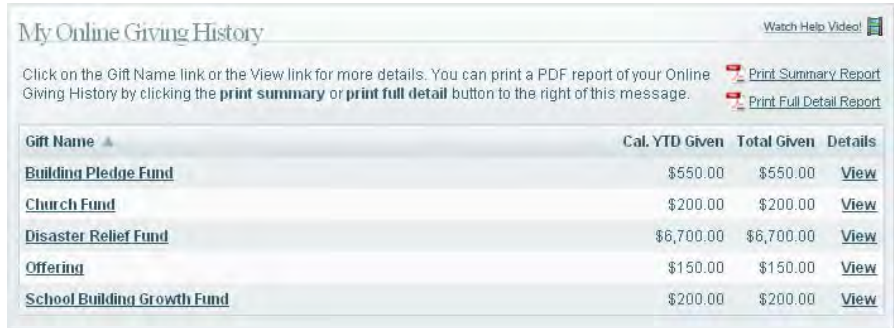
Here you can view your Online Giving History. Click on the Gift Name link or the View link for more details. You can print a PDF report of your Online Giving History by clicking the print button to the right of this message. **PRINT**

<u>Gift Name</u> ▼	<u>Cal. YTD Given</u>	<u>Total Given</u>	<u>Details</u>
<u>Building Pledge Fund</u>	\$550.00	\$550.00	<u>View</u>
<u>Church Fund</u>	\$200.00	\$200.00	<u>View</u>
<u>Disaster Relief Fund</u>	\$700.00	\$700.00	<u>View</u>
<u>School Building Growth Fund</u>	\$200.00	\$200.00	<u>View</u>

Get My Total Contributions for All Gifts

Choose from two PDF reports to document your yearly contributions. Either report serves as a receipt for your tax-deductible contributions to your church.

1. Click either **Print Summary Report** (for a summarized contribution report) or **Print Full Detail Report** (for a report of each individual contribution made during the year).
2. The report will open in PDF format. Samples are shown below.
3. Use the icons at the top of the screen to Print, Save, or Email the report PDF file as an attachment.



Print Summary Report

Church of Demonstrations		
Giving History for Karen Johnson		
	Total YTD.	Total
Building Pledge Fund	\$550.00	\$550.00
Church Fund	\$200.00	\$200.00
Disaster Relief Fund	\$6,700.00	\$6,700.00
Offering	\$150.00	\$150.00
School Building Growth Fund	\$200.00	\$200.00
Total	\$7,800.00	\$7,800.00

Tuesday, July 28, 2009 1/1
No Goods or Services were provided by the Church or its Organizations in return for these Contributions.

Print Full Detail Report

Church of Demonstrations			
Giving History for Karen Johnson			
\$7,800.00			
Building Pledge Fund	Gift Type	Date	Amount
Visa Card - 1111	One Time Gift	03/18/2009	\$50.00
Visa Card - 1111	Pledge	03/18/2009	\$200.00
Visa Card - 1111	Pledge	03/27/2009	\$300.00
Total			\$550.00
Offering	Gift Type	Date	Amount
Visa Card - 1111	Regular Offering	06/07/2009	\$150.00
Total			\$150.00
Disaster Relief Fund	Gift Type	Date	Amount
Visa Card - 1111	One Time Gift	03/18/2009	\$300.00
Visa Card - 1111	One Time Gift	03/23/2009	\$50.00
Visa Card - 1111	One Time Gift	04/28/2009	\$350.00
Visa Card - 1111	One Time Gift	05/20/2009	\$5,000.00
Visa Card - 1111	One Time Gift	05/26/2009	-\$1,000.00
Total			\$6,700.00
Church Fund	Gift Type	Date	Amount
Visa Card - 1111	One Time Gift	03/18/2009	\$200.00
Total			\$200.00
School Building Growth Fund	Gift Type	Date	Amount
Visa Card - 1111	Pledge	04/17/2009	\$200.00
Total			\$200.00

Tuesday, July 28, 2009 1/1
No Goods or Services were provided by the Church or its Organizations in return for these Contributions.

Get My Contribution Totals for a Specific Gift

1. Click **My Online Giving History** or **My Active Online Gifts**.

Gift Name	Cal. YTD Given	Total Given	Details
Building Pledge Fund	\$550.00	\$550.00	View
Church Fund	\$200.00	\$200.00	View
Disaster Relief Fund	\$700.00	\$700.00	View
School Building Growth Fund	\$200.00	\$200.00	View

2. Click either the gift name (e.g., **Building Pledge Fund**) or the **View** or **History** links.

Date Range: 1/1/2009 to 4/29/09 Apply

Payment Method	Type	Date	Amount	Confirm #
Visa Card - 1111	Pledge	3/27/2009	\$300.00	C3R9ESNbf0
Visa Card - 1111	Pledge	3/18/2009	\$200.00	B3l9Ay3dJ0
Visa Card - 1111	One Time Gift	3/18/2009	\$50.00	B3l9AQuZF0

3. Change the Date Range if needed by clicking the calendar icon and selecting the new dates. Click **Apply**.
4. Click the **Print** button to open a preview of your report in PDF format. Use the icons at the top of the screen to Print, Save, or Email the report PDF file as an attachment.

Church of Demonstrations

Giving History for Karen Johnson to Building Pledge Fund from 01/01/2009 to 07/30/2009

Payment Method	Gift Type	Date	Amount
Visa Card - 1111	One Time Gift	03/18/2009	\$50.00
Visa Card - 1111	Pledge	03/18/2009	\$200.00
Visa Card - 1111	Pledge	03/27/2009	\$300.00
Total			\$550.00

Thursday, July 30, 2009 1/1

No Goods or Services were provided by the Church or its Organizations in return for these Contributions.

My Active Online Giving

From the Home page, **My Active Online Giving** opens a view of your active and suspended gifts. Click the **History** link to view or print a report of your individual gift payments.



My Active Online Giving Watch Help Video!

View funds that you're currently giving to. You can print a PDF report of your Active Giving by clicking the print button. PRINT

Gift Name ▼	Gift Type	Status	Next Gift Date	Cal. YTD Given	Total Given	Details
Building Pledge Fund	Pledge	●	3/27/2009	\$300.00	\$300.00	Edit / History
Building Pledge Fund	Pledge	●	3/18/2009	\$200.00	\$200.00	Edit / History
Church Fund	Regular Offering	●	3/18/2009	\$0.00	\$0.00	Edit / History
Disaster Relief Fund	One Time Gift	●	3/31/2009	\$0.00	\$0.00	Edit / History
Offering	Regular Offering	●	4/1/2009	\$0.00	\$0.00	Edit / History

Sort List Views

Any of the list views on the Online Giving website can be sorted by clicking the underscored column header of your choice.

For example, the screen *My Active Online Giving* lists gifts alphabetically by gift name; but if you have a lengthy list of gifts, you may find it useful to click the **Next Gift Date** column—this will sort the list so that the next scheduled Online Giving payment will be listed at the top. Click the column header again to reverse the sort order.

<u>Next Gift Date</u> ▲
6/7/2009
4/17/2009
3/27/2009
3/18/2009
3/18/2009

Arrows next to the column header indicate the current sort selection. The up arrow means that the list is currently sorted by this category in descending order. A down arrow indicates ascending order.

Manage My Payment Methods Watch Help Video!

My Credit/Debit Cards | **My Bank Accounts**

My Bank Accounts

<u>Account Name</u> ▼	<u>Account #</u>	<u>Routing #</u>	<u>Edit Bank</u>
Chase Checking	...7890	...0000	Edit / Delete

My Active Online Giving Watch Help Video!

View funds that you're currently giving to. You can print a PDF report of your Active Giving by clicking the print button. PRINT

<u>Gift Name</u> ▼	<u>Gift Type</u>	<u>Status</u>	<u>Next Gift Date</u>	<u>Cal. YTD Given</u>	<u>Total Given</u>	<u>Details</u>
Building Pledge Fund	Pledge	●	3/27/2009	\$300.00	\$300.00	Edit / History
Building Pledge Fund	Pledge	●	3/18/2009	\$200.00	\$200.00	Edit / History
Church Fund	Regular Offering	●	3/18/2009	\$0.00	\$0.00	Edit / History
Disaster Relief Fund	One Time Gift	●	3/31/2009	\$0.00	\$0.00	Edit / History
Offering	Regular Offering	●	4/1/2009	\$0.00	\$0.00	Edit / History

My Online Giving History Watch Help Video!

Here you can view your Online Giving History. Click on the Gift Name link or the View link for more details. You can print a PDF report of your Online Giving History by clicking the print button to the right of this message. PRINT

<u>Gift Name</u> ▼	<u>Cal. YTD Given</u>	<u>Total Given</u>	<u>Details</u>
Building Pledge Fund	\$550.00	\$550.00	View
Church Fund	\$200.00	\$200.00	View
Disaster Relief Fund	\$700.00	\$700.00	View
School Building Growth Fund	\$200.00	\$200.00	View

Building Pledge Fund Summary ×

Date Range: 1/1/2009 to 4/29/09 Apply PRINT

<u>Payment Method</u>	<u>Type</u>	<u>Date</u> ▲	<u>Amount</u>	<u>Confirm #</u>
Visa Card - 1111	Pledge	3/27/2009	\$300.00	C3R9E5Nbf0
Visa Card - 1111	Pledge	3/18/2009	\$200.00	B319Ay3dJ0
Visa Card - 1111	One Time Gift	3/18/2009	\$50.00	B319AqzF0

Index

- About this Manual, 5
- Accepted Cards, 15
- Account
 - create new, 7
 - how to change, 17
 - how to delete, 17
 - payment by bank account or credit card, 14
 - required fields, 8
 - sign out, 10
- Account Number, 15
- Account Type, 15
- Address information
 - how to update, 18
 - user account, 8
- Anonymous donations, 21
- Bank Account Name, 15
- Bookmark a website, 6
- Cancel a Gift, 23
- Cancel button, 15
- Change a Gift, 22
- Checking Account, 14
- Clear Gift Information, 21
- Contact Us, 10
- Contribute Online, 19
- Cookies, 5
- Credit Card, 14
 - billing address, 16
 - card alias, 15
 - card number, 15
 - expiration date, 15
 - pay by, 14
 - Phone Number in billing address, 16
- Credit Cards
 - accepted types, 15
- Debit Card, 14
- Down Payment, 19
- Edit a Gift, 22
- Email address
 - how to update, 18
 - user account, 8
- End-of-Year Reports, 27
- Failed transaction, 21
- FAQs, 10
- Favorites list, 6
- Firefox, 5
- Forgot User ID or Password, 9
- Get My Contribution Totals for a Specific Gift, 28
- Gift Types, 19
- Gifts
 - how to cancel, 23
 - how to change, 22
 - how to suspend future transactions, 23
- Give a New Gift, 19
 - quick start instructions, 13
- Google Chrome, 5
- History
 - of payments, 28
- Internet Explorer, 5
- Introduction, 5
- Java Script, 5
- Log in
 - sign up for new account, 7
- Navigation from home page, 10
- Offering, 19
- One-Time Gift, 19
- Online Giving
 - view website, 6
- Open website, 6
- OSV Prayerful Content Subscription, 18
- Password, 7, 8
 - change, 18
 - request reminder, 9
 - security recommendation, 11
- Pay
 - by credit card or bank account, 14
- Pay Online, 19
- Payment Methods
 - how to change, 17
 - how to set up, 14
- Payments
 - how to cancel future transactions, 23
 - how to suspend, 23
 - view history, 28
- Phone Number
 - in your Online Giving account, 8
- Pledge, 19
- Pledge Reports. *See* Get My Contribution Totals for a Specific Gift
- Popup blockers, 5
- Quick Start instructions, 13
- Registration Code, 8
- Regular Offering, 19
- Reports, 26
- Routing Number, 15
- Safari, 5
- Savings Account, 14
- Secure Sockets Layer, 11
- Security Statement, 11
- Sign out, 10
- Snapshot of giving totals, 10
- Sorting, 30
- Statements, 26
- Statistics
 - home page dashboard, 10

- Status of Active Gifts, 23
- Submit, 15
- Subscription
 - to OSV Prayerful content, 18
- Support
 - contact your church, 10
 - video help, 5

- Suspend a Gift, 23
- System requirements, 5
- Tax Reports, 27
- User ID, 7, 8
 - request reminder, 9
- Videos, 5
- Web browser compatibility, 5