

CREATING A DONOR ACCOUNT

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

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

The screenshot shows the 'New User Account Registration' page for the Church of Demonstration. The page has a header with the church's name and the 'Online Giving' logo. Below the header is a navigation bar with 'Home' and 'Create New Account' links. The main content area features a progress bar with five steps: 1. Profile (active), 2. Credentials, 3. Payment Method, 4. Give a gift, and 5. Thank you. The 'Profile' step includes input fields for First Name, Last Name, Email, Confirm Email, Address (Line 1, City, Zip), and Phone. There is also a link for 'Admin Code' and a green button labeled 'Enter Credentials >'. The footer contains the church's name and location, and a row of links: 'About Online Giving', 'Online Giving Security', 'Online Giving Users Guide', 'Online Giving FAQs', and 'Contact Us'.

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

Click Enter Credentials.

Church of Demonstration Online Giving

[Home](#) [Create New Account](#)

New User Account Registration

1 Profile 2 **Credentials** 3 Payment Method 4 Give a gift 5 Thank you

User ID *

User Name

Password *

Password

Confirm Password *

Confirm Password

☐ I'm not a robot reCAPTCHA [Privacy](#) [Terms](#)

[< Back to Profile](#) [Create Account](#)

Church of Demonstration - Huntington In, 46750

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

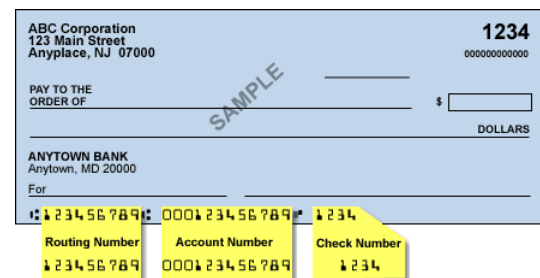
Click the **Create Account** button. You will receive email confirmation that your account has been created.

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

The screenshot shows the 'New User Account Registration' page for the Church of Demonstration. The page has a header with the church's name and 'Online Giving' logo. Below the header is a navigation bar with 'Home' and 'Create New Account' links. The main content area features a progress bar with five steps: 1. Profile, 2. Credentials, 3. Payment Method (currently active), 4. Give a gift, and 5. Thank you. A green message box states: 'You've successfully created an Online Giving Account. Add a payment method to your account so you can start giving.' Below this are two buttons: 'Add Bank Account' and 'Add Credit Card'. The 'Add Bank Account' section includes fields for 'Bank Name' (with a hint 'How will you refer to this account?'), 'Bank Account Type' (a dropdown menu), 'Routing Number', 'Confirm Routing Number', 'Account Number', and 'Confirm Account Number'. At the bottom of this section are two buttons: 'Create Payment' and 'No Thanks'.

To add a Bank account:

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



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

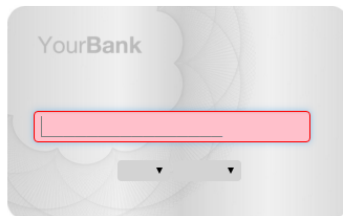
New User Account Registration



You've successfully created an Online Giving Account. Add a payment method to your account so you can start giving.

[Add Bank Account](#) [Add Credit Card](#)

Accepted Cards



Card Nickname *

How will you refer to this card?

☐ Use Alternate Address

[Create Payment](#) [No Thanks](#)

To add a Credit Card:

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

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

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

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

New User Account Registration



Your payment method was saved. Let's create your first gift.

Start by selecting a fund:

Weekly Offering

Regular Weekend Collection

Select A Gift Type: ?

One Time

How much would you like to give? *

\$ 25

When would like to make the gift? *

12/25/2015

Would you like to give an additional gift of \$3.00 to offset fees?

No

Please enter any special intentions for this gift.

One Time Gifts:

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

New User Account Registration

1 2 3 4 5

Profile Credentials Payment Method Give a gift Thank you

Your payment method was saved. Let's create your first gift.

Start by selecting a fund:

Weekly Offering

Regular Weekend Collection

Select A Gift Type: ?

Recurring

What is the amount you'd like to give? *

\$ 25.00

What date should this recurring gift start? *

12/25/2015

How often would you like these gifts to occur? *

Yearly

Recurring Gifts:

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

New User Account Registration

1 Profile 2 Credentials 3 Payment Method 4 Give a gift 5 Thank you

Your payment method was saved. Let's create your first gift.

Start by selecting a fund:

Building Improvement

Fund to help the development of the Church.

Select A Gift Type: ?

Pledge

What is the total amount for this pledge ? *

\$ 1000.00

Would you like to make a one-time initial deposit?

Yes

What is the amount of your deposit? *

\$ 100.00

When would you like to make the deposit? *

12/25/2015

Pledge remaining after deposit

\$900.00

What is the recurring amount you'd like to give? *

\$ 25.00

When should these installments start? *

12/25/2015

How often should these installments occur? *

Monthly

Gift Summary:

Pledge:

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

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

Gift Summary:

I would like to make a One Time Gift of \$25.00 (plus an additional gift of \$3.00 to offset fees) to Mass Intentions.

Please charge my Visa payment method one time on 12/25/2015 .

[Submit Gift](#) [No Thanks](#)

New User Account Registration

1 2 3 4 5

Profile Credentials Payment Method Give a gift Thank you

Your gift has been submitted

Thank you for creating a new Online Giving account.

A confirmation email has been sent to your email address.

Would you like to

[Give Another Gift](#) [Go to Home Page](#)

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

LOGGING INTO ONLINE GIVING

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

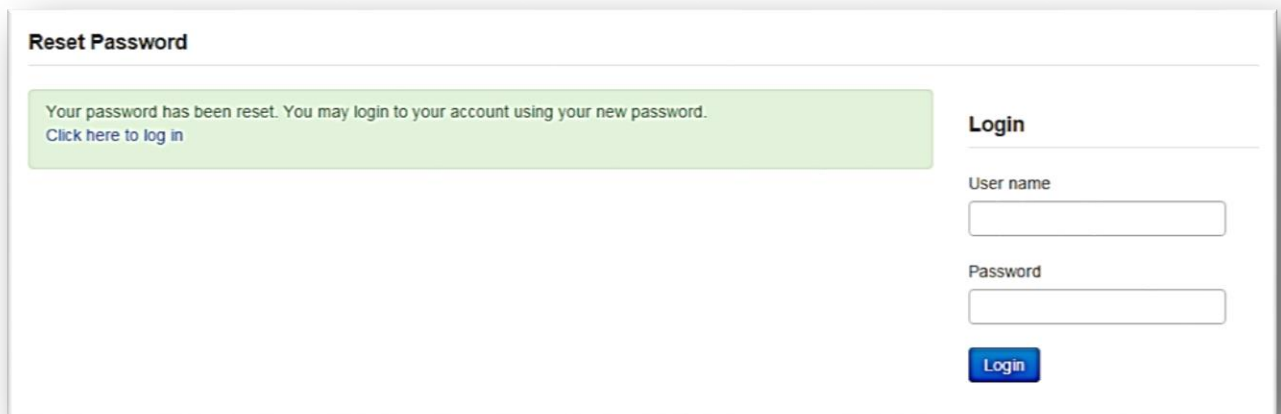
- Navigate to your Online Giving URL
- Under **Login**
 - **User name** – key in the user name that you created
 - **Password** – key in the password that you created
- Click the **Login** button

FORGOT USER ID OR PASSWORD

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

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

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



The screenshot shows a web interface titled "Reset Password". On the left, a green message box states: "Your password has been reset. You may login to your account using your new password." with a blue link "Click here to log in". On the right, under the heading "Login", there are two input fields labeled "User name" and "Password", and a blue "Login" button below them.

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

DONOR HOME PAGE

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

The screenshot shows the 'Demonstration Church' Online Giving interface. At the top, the church name is on the left and the 'Online Giving' logo is on the right. Below the church name is a navigation bar with 'Home' and 'Manage My Account' links. On the right of the navigation bar, the user's name 'Heather Bowman' and a 'Sign Out' button are displayed. The main content area is titled 'Heather's Online Giving Home' and features five action links with icons: 'Give a New Gift', 'View or Update My Current Gifts', 'Add or Update My Payment Methods', 'View or Update My Personal Information', and 'View My Giving History & Tax Information'. To the right of these links is a 'My Recent Gifts' section showing a list of four 'Weekly Offering' gifts, each for \$100.00 or \$1.00, dated 7/22/2014. Below this list, a summary bar shows 'Given YTD: \$1,236.00'. At the bottom of the page, a welcome message reads 'Welcome to Online Giving- Church of Demo - Huntington, IN', followed by a footer with links: 'About Online Giving', 'Online Giving Security', 'Online Giving Users Guide', 'Online Giving FAQs', and 'Contact Us'.

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

GIVE A NEW GIFT

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

The screenshot shows the 'Demonstration Church' Online Giving interface. At the top, there's a header with the church name and a red underline. To the right is the 'Online Giving' logo. Below the header is a navigation bar with links for 'Home' and 'Manage My Account', and a user profile section for 'Heather Bowman' with a 'Sign Out' button. The main section is titled 'Give' and contains three fund options, each with a gift icon and a 'Select Gift Type' dropdown menu:

- New Fund**: this is a test for OLG
- Weekly Offering**: Test
- Capital Campaign**: Capital Campaign runs March 1, 2014 through March 1, 2018

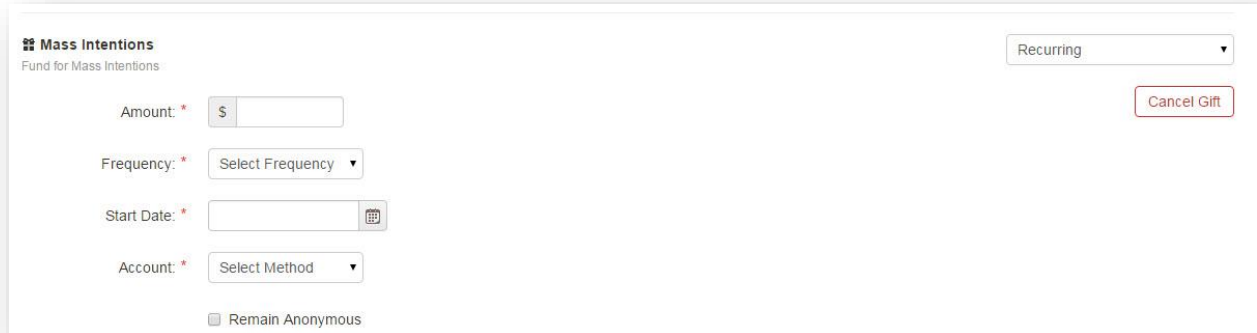
At the bottom right of the fund list are 'Clear Gifts' and 'Next' buttons. A footer message reads 'Welcome to Online Giving- Church of Demo - Huntington, IN'. At the very bottom are links for 'About Online Giving', 'Online Giving Security', 'Online Giving Users Guide', 'Online Giving FAQs', and 'Contact Us'.

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

RECURRING DONATIONS

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

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



The screenshot shows a web form titled "Mass Intentions" with the subtitle "Fund for Mass Intentions". In the top right corner, there is a dropdown menu set to "Recurring" and a red "Cancel Gift" button. The form contains several fields: "Amount: *" with a dollar sign icon and a text input; "Frequency: *" with a dropdown menu labeled "Select Frequency"; "Start Date: *" with a text input and a calendar icon; and "Account: *" with a dropdown menu labeled "Select Method". At the bottom, there is a checkbox labeled "Remain Anonymous".

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

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

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

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

ONE TIME DONATIONS

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

The screenshot shows a web form titled "Weekly Offering" with the subtitle "Regular Weekend Collection". In the top right corner, there is a dropdown menu set to "One Time" and a red "Cancel Gift" button. The form contains several input fields: "Amount:" with a dollar sign icon and a text box; "Date:" with a text box and a calendar icon; "Account:" with a dropdown menu showing "Card - 1111"; a checkbox labeled "I would like to give an additional gift of \$3 to offset fees."; a text box for "Special Intentions (500 character limit)"; and a checkbox labeled "Remain Anonymous".

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

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

PLEDGE DONATIONS

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

PLEDGE CALCULATOR

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

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

- **Installment Amount** – use this option to determine the payment amount
 - **Calculate** – Make sure the Installment Amount is selected for this option.
 - **Pledge Total** – Type in the total amount you would like to donate.
 - **Initial Deposit** – Check this box if you would like to make an initial deposit. This is not required and you can make payments without this.
 - If you choose to make an initial deposit, you will get two additional fields to pop up.
 - **Of** – Key in the amount of the initial deposit
 - **On** – Key in the date that you would like to make this initial deposit.
 - **Frequency** – Select the frequency of the donation that you are setting up. Options are determined by the organization that you are donating to. Options that could be included:
 - Weekly
 - Bi-Weekly
 - Monthly
 - Quarterly
 - Twice a Year - every 6 months
 - Yearly

The screenshot shows the 'Pledge Calculator' window. At the top, there are two radio buttons: 'Installment Amount' (selected) and 'Pledge Total'. Below this is a 'Pledge Total' field with a dollar sign icon. Underneath is an 'Initial Deposit' section with a checkbox labeled 'I would like to make an initial deposit'. Below that is a 'Frequency' dropdown menu labeled 'Select Frequency'. Then there are 'Starting on' and 'Ending' date fields, each with a calendar icon. At the bottom, there is an 'Installment Amount' field with a dollar sign icon. At the very bottom right are 'Confirm' and 'Cancel' buttons.

The screenshot shows a pop-up form titled 'Initial Deposit'. It has a checkbox labeled 'I would like to make an initial deposit' which is checked. Below this are two fields: 'Of' with a dollar sign icon and 'On' with a calendar icon.

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

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

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

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

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

- **Starting On** – Enter the date that you would like the donation to start processing.
- **Ending** – Enter the date that you would like the donation to end on.
 - **Fund End Date** – You can select the date the organization has selected as the end date for the fund
 - **Other** – You will select the date that you would like the donation to stop
- **Initial Deposit** – Check this box if you would like to make an initial deposit. This is not required and you can make payments without this.

The screenshot shows a 'Pledge Calculator' window with the following fields and options:

- Calculate:** Radio buttons for 'Installment Amount' and 'Pledge Total' (selected).
- Installment Amount *:** A text input field with a dollar sign icon.
- Frequency *:** A dropdown menu showing 'Select Frequency'.
- Starting on *:** A date input field showing '11/1/2014' with a calendar icon.
- Ending *:** Radio buttons for 'Fund End Date' and 'Other' (selected). Below 'Other' is a date input field showing '11/30/2019' with a calendar icon.
- Balance to be Scheduled:** A text input field with a dollar sign icon and the value '100.00'.
- Initial Deposit:** A checkbox labeled 'I would like to make an initial deposit' (checked). Below it are 'Or' and 'On' options, each with a text input field and a calendar icon.
- Pledge Total:** A text input field with a dollar sign icon and the value '100.00'.
- Buttons:** 'Confirm' (green) and 'Cancel' (grey) buttons at the bottom right.

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

- If you choose to make an initial deposit, you will get two additional fields to pop up.

- **Of** – Key in the amount of the initial deposit
- **On** – Key in the date that you would like to make this initial deposit

A screenshot of a form section. It includes a field 'Balance to be Scheduled' with a dollar sign icon and the value '2000.00'. Below it is a checkbox labeled 'Initial Deposit' which is checked, followed by the text 'I would like to make an initial deposit'. Under this, there is a field 'Of' with a dollar sign icon and the value '200', and a field 'On' with a calendar icon.

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

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

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

COMPLETEING PLEDGE

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

A screenshot of a web form titled 'Building Improvement' with the subtitle 'Fund to help the development of the Church.' There is a 'Pledge' dropdown menu and a 'Cancel Gift' button. A 'Use Pledge Calculator' button is present. The form contains several fields: 'Pledge Total' with a dollar sign icon, 'Balance to be Scheduled' with a dollar sign icon and value '0.00', a checked checkbox 'I would like to make an Initial Deposit', 'Installation Amount' with a dollar sign icon, 'Of' with a dollar sign icon, 'Starting on' with a calendar icon, 'On' with a calendar icon, 'Frequency' with a dropdown menu 'Select Frequency', 'Using' with a dropdown menu 'Select Method', and another 'Using' with a dropdown menu 'Select Method'. At the bottom, there is a checkbox 'Remain Anonymous'.

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

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

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

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

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

SUBMITTING DONATIONS

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

- Click the green **Next** button

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

Confirm Givings

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

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

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

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

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

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

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

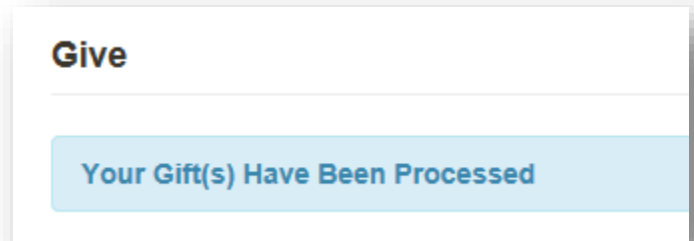
I am pledging **\$5,000.00** with an initial deposit of **\$2,500.00** on **8/1/2014** from my **Test - 1111**. The balance of my pledge, **\$2,500.00**, will begin on **9/1/2014** in the amount of **\$60.00 Monthly** from my **Test - 1111** until fulfilled on **2/1/2018**. I would like to give this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

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

Back
Confirm

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

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



VIEW OR UPDATE MY CURRENT GIFTS

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

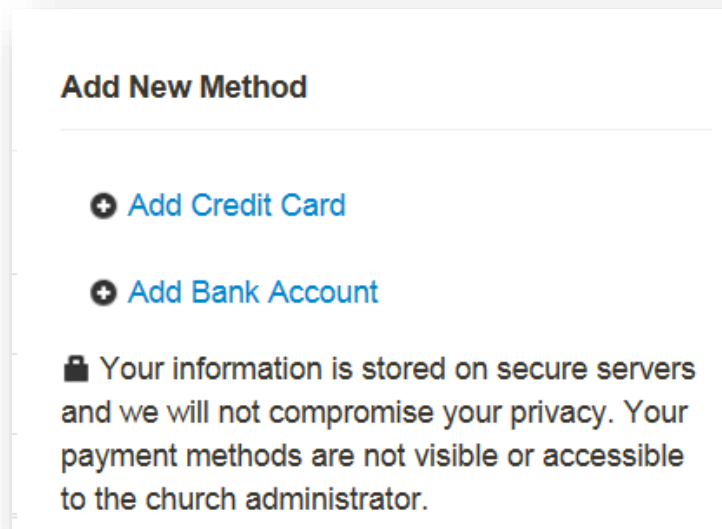
Active Online Giving							
The Active Giving report requires a PDF viewer like Adobe Reader .							
Name	▲ Gift Type	Frequency	Status	Next Gift Date	Next Gift Amount	Pledge	
Capital Campaign	Pledge	Monthly	Active	9/1/2014	\$60.00	\$5,000.00	Edit
Mother's Day	One Time	One Time Gift	Active	5/13/2015	\$20.00		Edit
Mother's Day	Pledge	Monthly	Suspended	9/1/2014	\$43.34	\$1,000.00	Edit
Weekly Offering	One Time	One Time Gift	Active	7/24/2014	\$100.00		Edit

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

ADD OR UPDATE MY PAYMENT METHODS

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

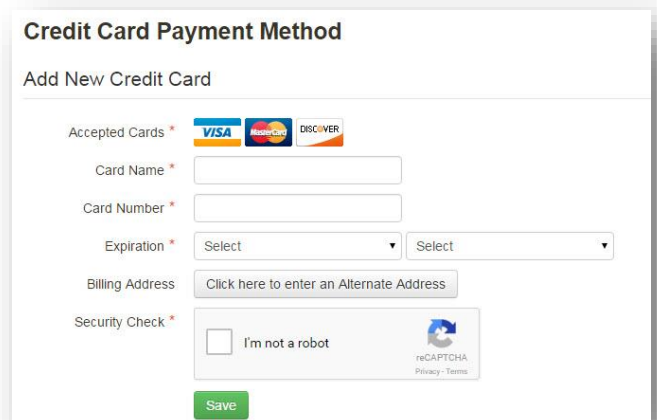
ADD NEW PAYMENT METHOD



The screenshot shows a white dialog box titled "Add New Method". It contains two blue links with plus icons: "Add Credit Card" and "Add Bank Account". Below these links is a security notice: "Your information is stored on secure servers and we will not compromise your privacy. Your payment methods are not visible or accessible to the church administrator."

CREDIT CARD



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



The screenshot shows a form titled "Credit Card Payment Method" with the subtitle "Add New Credit Card". It includes fields for "Accepted Cards" (with logos for Visa, MasterCard, and Discover), "Card Name", "Card Number", and "Expiration" (with dropdown menus). There is a "Billing Address" field with a link to "Click here to enter an Alternate Address". A "Security Check" section includes a checkbox for "I'm not a robot" and a reCAPTCHA logo. A green "Save" button is at the bottom.

- ## BANK ACCOUNT

BANK ACCOUNT

- # Bank Account Payment Method
- ## Add New Bank Account
- Bank Name *
- Bank Account Type *
- 
- Routing Number *
- Confirm Routing Number *
- Account Number *
- Confirm Account Number *
- Enter the code: * ☐ I'm not a robot
- 
reCAPTCHA
[Privacy](#) - [Terms](#)
-


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

MY PERSONAL INFORMATION


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

Profile

Here you can view/edit your personal information such as email address, phone number and password.

Contact Information  Edit

Bradley Menendez
Envelope #: 22
Email: onlinegiving@osv.com
Phone: () -

Mailing Address  Edit

This address is used for billing purposes only.

200 Noll Plaza
Huntington, IN 46750


Change My Password


Current Password: *

New Password: *

Confirm New Password: *

Save

Clicking  Edit opens the windows as seen below:

Edit Contact Information 

First Name: *


Last Name: *


Envelope #: Your Envelope Number can not be changed.

Please contact us if you have any questions.

Email Address: *

Phone #:

Cancel 


Edit Mailing Address 

Address 1: *

Address 2:


City/State: *

Zip: *

Cancel 


MY GIVING HISTORY

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

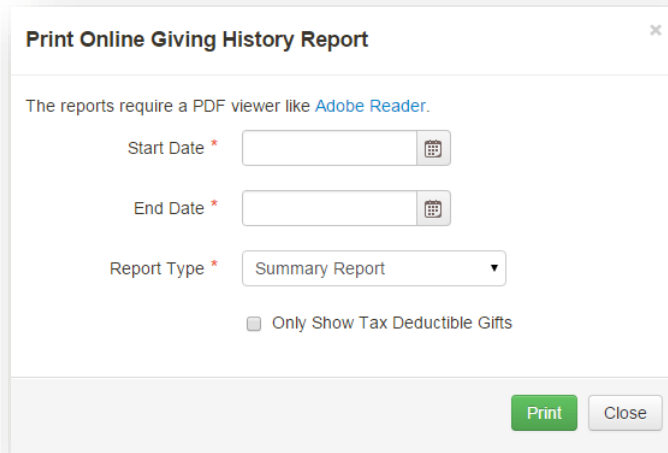
Online Giving History		
You can print reports by clicking Print .		
		 Print
Name	▲ Cal. YTD Given	Total Given
Building Improvement	\$5,565.99	\$7,268.99
Mass Intentions	\$349.00	\$477.00
School Tuition	\$67.00	\$67.00
Test Fund	\$168.87	\$168.87
This Fund is 50 Characters long.....	\$436.40	\$436.40
Weekly Offering	\$10,824.67	\$14,025.67
Page size: 50 ▼		

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

Mass Intentions History					
Payment Method	Type	Date ▲	Amount	Confirm #	
Test - 1111	Recurring	8/6/2015	\$45.00	F86FJUCnx0	
Test - 1111	Recurring	8/13/2015	\$45.00	G8DFJQ3XP0	
Test - 1111	Recurring	8/19/2015	\$30.00	C8JFJEMkd0	
Test - 1111	Recurring	8/20/2015	\$45.00	E8KFJEfR40	
Test - 1111	Recurring	8/27/2015	\$45.00	F8RFJESiE0	


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


You will need a PDF viewer to print the report



Print Online Giving History Report

The reports require a PDF viewer like [Adobe Reader](#).

Start Date * 

End Date * 

Report Type * Summary Report ▼

☐ Only Show Tax Deductible Gifts

Print **Close**

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

Gifts – When clicked the reports will be filtered to only show gifts that are tax deductible.