


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 Registration** page will appear
- Create your **Used ID** – This must be between 6 and 35 characters and may be alpha numeric and contain the special characters of !@&*.
- Create your **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
- **Registration Code** – You will not enter anything into this field. This is only used when creating an administrator login
- **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
- **Phone** – This is not required but you can key in a contact phone number
- **Address** – Most administrators will key in the organizations address when filling in this information. (**Address 2, City/State, and Zip**)
- **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 enter this code. If you cannot read the code, click the reload button  for a new code.
- Click the **Submit** button
- The **New User Account Registration** page will pop up
- You must now validate the account by going to your email and clicking the link to activate the Online Giving Account. **You will not be able to log into Online Giving until you click the link in your email.** Sometimes the email will go to your spam or junk folders. If you do not get this email. Please contact tech support at 800.348.2886 Option 4 for a new email.

New User Account Registration

Nathan Bowman, Your New Account Has Been Created!
Nathan Bowman ,

Thank you for creating an Online Giving account. Before you can login and start donating, **you must validate your email address**. To do this, please log into the email you provided us and click on the link titled "Welcome to Online Giving!". Doing so will help us make sure the email address provided is valid, if you do not receive this email please contact tech support at (800) 348-2886 x4 or by email at onlinegiving@osv.com.

*** Note if you have not received your email within 5-10 minutes, please check your spam folder as some providers may mark this email as spam. Gmail accounts will find their spam folder underneath the "More" heading.

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

[About Online Giving](#) | [Online Giving Security](#) | [Online Giving Users Guide](#) | [Online Giving FAQs](#) | [Contact Us](#)

LOGING INTO ONLINE GIVING

Once you have created and activated your Online Giving Account. You are now able to log into Online Giving.

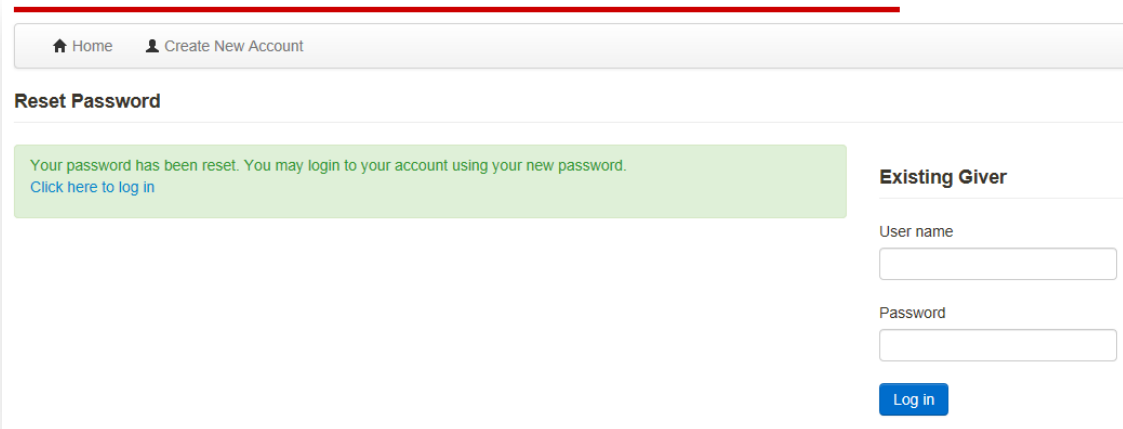
- Navigate to your Online Giving URL
- Under **Existing Giver**
 - **User name** – key in the user name that you created
 - **Password** – key in the password that you created
- Click the **Log in** button

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
- Enter your **User name** and **Password** under **Existing Giver**
- Click the blue **Log in** button



The screenshot displays a web interface with a navigation bar at the top containing a home icon and the text "Home", and a user icon with the text "Create New Account". Below the navigation bar, the page title is "Reset Password". A green message box contains the text: "Your password has been reset. You may login to your account using your new password." followed by a blue link "Click here to log in". To the right of the message box is a section titled "Existing Giver" which includes two input fields: "User name" and "Password". Below these fields is a blue button labeled "Log in".

DONOR HOME PAGE

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

The screenshot shows the donor home page for Demonstration Church. The page features a navigation bar with a home icon, a 'Manage My Account' dropdown menu, the user name 'Heather Bowman', and a 'Sign Out' button. Below the navigation bar, the page is divided into two main sections: 'Heather's Online Giving Home' and 'My Recent Gifts'. The 'Heather's Online Giving Home' section contains five 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'. The 'My Recent Gifts' section displays a list of four 'Weekly Offering' gifts, each for \$100.00 or \$1.00, dated 7/22/2014. Below the list, a summary box shows 'Given YTD: \$1,236.00'. At the bottom of the page, there is a welcome message and a footer with links for '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.
- **Sign Out** – This button will sign you out of Online Giving
- **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
 - **Blue 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.

Demonstration Church Online Giving

Home Manage My Account Heather Bowman Sign Out

Give

New Fund
this is a test for OLG Select Gift Type

Weekly Offering
Test Select Gift Type

Capital Campaign
Capital Campaign runs March 1, 2014 through March 1, 2018 Select Gift Type

Clear Gifts Next

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- 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 "Weekly Offering" with a subtitle "This is a collection to support the operation of our church. This collection is taken up weekly or monthly." In the top right corner, there is a dropdown menu set to "Recurring" and a red "Cancel Gift" button. The form fields include: "Amount: *" with a text input and a "\$" symbol; "Frequency: *" with a dropdown menu labeled "Select Frequency"; "Date: *" with a text input and a calendar icon; "Account: *" with a dropdown menu labeled "Select Method"; and 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.)

- **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.
- **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 donation form titled "Mother's Day". At the top left, there is a small icon of a gift box and the text "Mother's Day". Below this, a note reads: "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." In the top right corner, there is a dropdown menu with "One Time" selected. Below the note, there are 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 "Select Method"; "Special Intentions (500 character limit):" with a large text box; and a checkbox labeled "Remain Anonymous". In the top right corner of the form area, there is a red button labeled "Cancel Gift".

- **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.
- **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.

* You may 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.

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 Amount** – 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 a '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 and a text input box. Underneath is an 'Initial Deposit' section with a checkbox labeled 'I would like to make an initial deposit'. This is followed by a 'Frequency' dropdown menu with 'Select Frequency' as the current selection. Below that are 'Starting on' and 'Ending' fields, each with a text input box and a calendar icon. At the bottom of the form is an 'Installment Amount' field with a dollar sign and a text input box. A green 'Confirm' button and a grey 'Cancel' button are located at the bottom right of the window.

This screenshot shows a close-up of the 'Initial Deposit' section. It features a checked checkbox followed by the text 'I would like to make an initial deposit'. Below this are two input fields: 'Of' with a dollar sign and a text input box, and 'On' with a text input box and 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 On** – 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.
 - **Instalment 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.
 - **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

The screenshot shows a 'Pledge Calculator' window. At the top, there are two radio buttons: 'Installment Amount' (unselected) and 'Pledge Total' (selected). Below this, there are several input fields: 'Installment Amount' with a dollar sign and an empty box; 'Frequency' with a dropdown menu showing 'Select Frequency'; 'Starting on' with a date field set to '11/1/2014' and a calendar icon; 'Ending' with two radio buttons: 'Fund End Date' (unselected) and 'Other' (selected), followed by a date field set to '11/30/2019' and a calendar icon; 'Balance to be Scheduled' with a dollar sign and a field containing '100.00'; 'Initial Deposit' with a checked checkbox 'I would like to make an initial deposit', followed by 'Or' and a dollar sign with an empty field, and 'On' with an empty date field and a calendar icon. At the bottom, there is a 'Pledge Total' field with a dollar sign and a field containing '100.00'. At the very bottom right, there are two buttons: 'Confirm' (green) and 'Cancel' (grey).

This is a close-up of the 'Initial Deposit' section from the previous screenshot. It shows the 'Initial Deposit' checkbox checked, followed by the text 'would like to make an initial deposit'. Below this, there is an 'Of' label followed by a dollar sign and a field containing '200'. At the bottom, there is an 'On' label followed by an empty date field and a calendar icon.

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
- **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.

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

Use Pledge Calculator Pledge Cancel Gift

Pledge Total * Balance to be Scheduled

I would like to make an Initial Deposit Installation Amount *

Of * Starting on *

On * Frequency *

Using * Using *

I would like to give this gift on behalf of

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.
- **Instalment 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

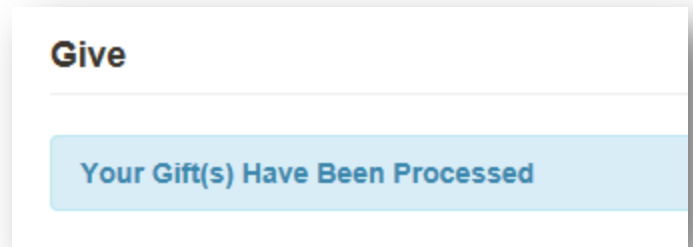
🔔 Capital Campaign
Capital Campaign runs March 1, 2014 through March 1, 2018

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.

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- **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	Print
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.