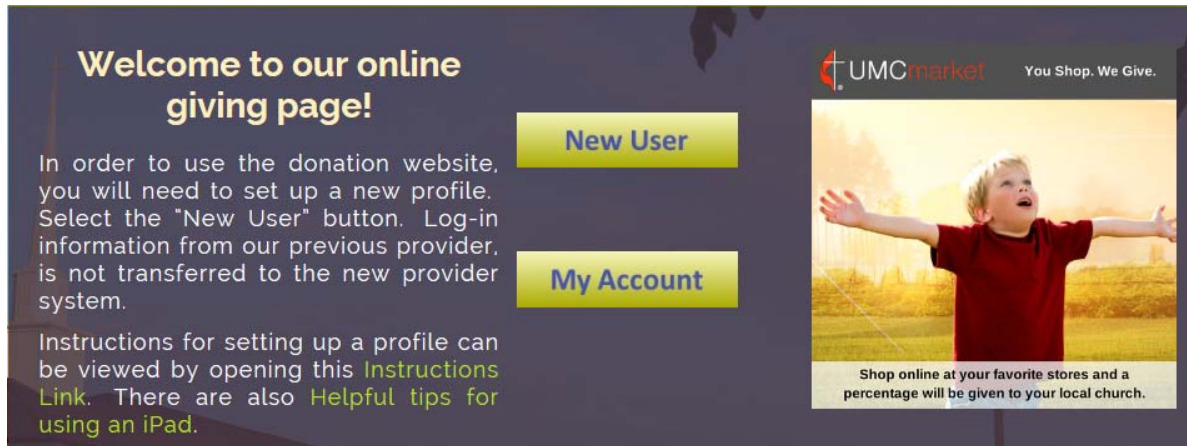


# ONLINE GIVING QUICK GUIDE

If not already on the on-line giving screen, select the online giving tab.



The **online giving** page will open.



## SETTING UP A NEW USER PROFILE

1. Click on the **New User** button to create a profile. The **Add Profile** screen will appear.
2. Fill in the applicable blanks with your information.

A screenshot of the "Add Profile" form on a green background. The form has the following fields: Organization, Title, Prefix (dropdown), First Name, Last Name, Suffix (dropdown), Unique ID, Password (with a strength indicator), and Confirm Password. There are also three "Add" buttons: "Add An Address" (with a location pin icon), "Add An Email" (with an envelope icon), and "Add A Phone" (with a phone icon). At the bottom left is an "Add" button.

- **Organization** – avonumc
- **Title** – can leave blank.
- **Prefix** – choose from the drop down
- Enter **first** and **last name**.
- **Suffix** – choose from the drop down, if applicable.
- **Unique ID** – this is optional. If creating, I recommend, 1<sup>st</sup> initial and last name.
- **Password** - needs to be between 6 and 25 characters in length, contain upper and lower case letters, and at least one number.

3. When all profile boxes are complete, select the **Add An Address** button and fill in the applicable boxes.

**Add An Address** ✕

Description  
Home

Address  
123 ABC Drive

Address 2  
Apt. B

City  
Avon

State  
Indiana

Country  
UNITED STATES

Zip Code  
46123

Add Cancel

- **Description** – i.e. home, work, etc.

When you have filled in all the applicable fields, press the **Add** button.

4. Now select the  **Add An Email** option and fill in the applicable boxes.

**Add An Email Address** ✕

Description  
home

Email Address  
nsample@gmail.com

Add Cancel

- **Description** – i.e. home, work, etc.

When you have filled in all the applicable fields, press the **Add** button.

5. Finally, select the  **Add A Phone** option and fill in the applicable boxes.

**Add A Phone Number** ✕

Description  
Home

Phone Number  
317-555-5555

International Phone Number  
 Mobile Phone

Add Cancel

- **Description** – i.e. home, work, etc.
- Check the **Mobile Phone** box if the number you entered goes to a cellphone.

When you have filled in all the applicable fields, press the **Add** button.

6. Once you have completed the basic profile and the address, email and phone categories, press the **Add** button at the bottom of the profile screen

**Add Profile**

Organization  
avonumc

Title

Profile  
Mr.

First Name  
New

Last Name  
Sample

Suffix  
Jr.

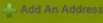
Unique ID

Password  
\*\*\*\*\*

Confirm Password  
\*\*\*\*\*


**Addresses**

Description	Address	Action
✓ home	123 ABC Drive, Apt. B, IN 46123, UNITED STATES	✕

 Add An Address


**Email Addresses**

Description	Email Address	Action
✓ home	nsample@gmail.com	✕

 Add An Email

**Phone Numbers**

Description	Phone Number	Action
✓ Home	317-555-5555	✕

 Add A Phone

Add

7. Your profile summary will appear. You can update your profile at any time. Your **LOGIN ID** will be your email address.

**Profile Summary**

[Edit Profile](#) [Reset Password](#)

Mr. New Sample Jr.  
avonumc

Login ID: nsample@gmail.com

**Contact Information**

**Addresses**

Description	Address	Address 2	City	State	Postal	Country
✓ home	123 ABC Drive		Apt. B	IN	46123	UNITED STATES

**Phone Numbers**

Description	Phone Number
✓ Home	317-555-5555

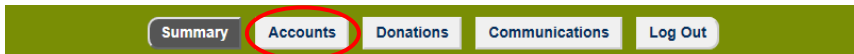
**Email Addresses**

Description	Email Address
✓ home	nsample@gmail.com

## SETTING UP YOUR ACCOUNTS

Accounts refers to your method of payment. You can enter a debit card, credit card, or checking. AUMC does not have access to this account information (The financial staff can see the last four digits, as is standard with online stores). The site is protected by **Security Metrics Credit Card Safe**.

1. Select the **Accounts** button.



The payment screen will open.

**Default Payment Method**

There are no payment methods on file for this profile.

**Debit/Credit Card**

Name	Card Type	Card Number	Expiration	Action
There are no cards on file for this profile.				

[Add Debit/Credit Card](#)

**eCheck**

Name	Bank	Account Number	Account Type	Action
There are no eCheck accounts on file for this profile.				

[Add eCheck](#)

2. Select **Debit/Credit Card** or **eCheck**. You may enter more than one payment account, if desired. The system will ask you to mark one as the default method.
3. Complete all the applicable fields. If you want this to be your default payment method, select the check box for **Default** at the top of the screen. When done entering your information select the **Add** button. Your payment method(s) are now stored.

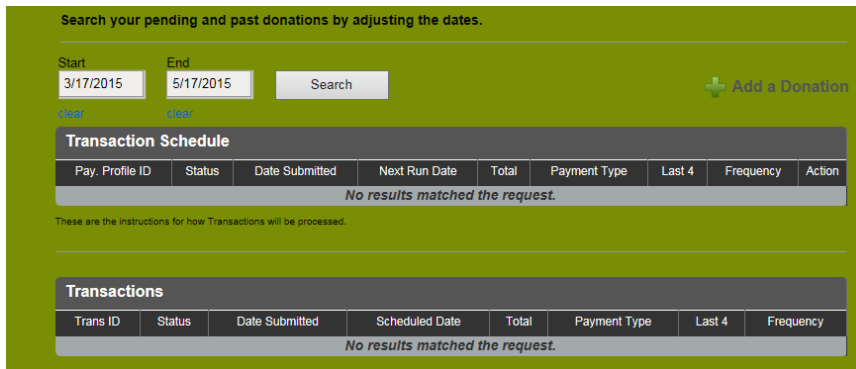
## ENTERING A DONATION

Donations can be set up as one-time or can be set up as recurring.

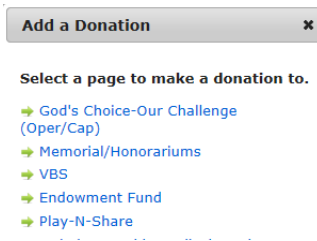
1. Select the **Donations** button.



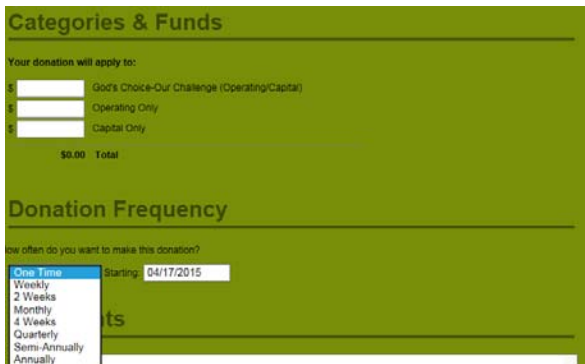
The donations screen will open.

A screenshot of the donations interface. At the top, it says 'Search your pending and past donations by adjusting the dates.' Below this are input fields for 'Start' (3/17/2015) and 'End' (5/17/2015), a 'Search' button, and a '+ Add a Donation' button. Below the search fields are two tables. The first table is titled 'Transaction Schedule' and has columns: Pay\_Profile ID, Status, Date Submitted, Next Run Date, Total, Payment Type, Last 4, Frequency, and Action. It contains the text 'No results matched the request.' The second table is titled 'Transactions' and has columns: Trans ID, Status, Date Submitted, Scheduled Date, Total, Payment Type, Last 4, and Frequency. It also contains the text 'No results matched the request.'

2. Select the **+ Add a Donation** button. A list of donation options will appear.

A screenshot of the 'Add a Donation' dropdown menu. The dropdown is open, showing a list of donation categories: 'God's Choice-Our Challenge (Oper/Cap)', 'Memorial/Honorariums', 'VBS', 'Endowment Fund', and 'Play-N-Share'. Each item has a right-pointing arrow next to it.

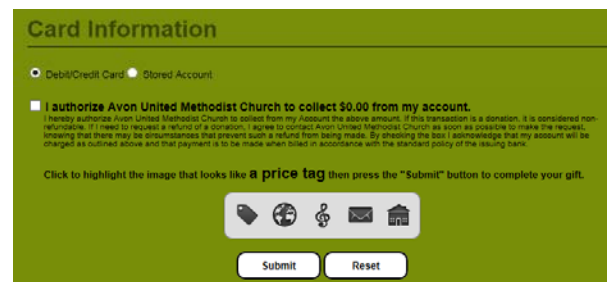
3. Select the donation Transactions option you wish. A donation form will appear.

A screenshot of the donation form. The top section is titled 'Categories & Funds' and has the heading 'Your donation will apply to:'. Below this are three input fields with labels: 'God's Choice-Our Challenge (Operating/Capital)', 'Operating Only', and 'Capital Only'. The total amount is shown as '\$0.00 Total'. The bottom section is titled 'Donation Frequency' and has the heading 'How often do you want to make this donation?'. It features a dropdown menu with options: 'One Time', 'Weekly', '2 Weeks', 'Monthly', '4 Weeks', 'Quarterly', 'Semi-Annually', and 'Annually'. The 'One Time' option is selected. A 'Starting' date field is set to '04/17/2015'.

Enter the amount you wish to donate and select a donation frequency from the drop down list.

4. Select the payment type and authorized the donation.

You have now successfully made a donation. If you selected for the donation to be recurring then it will automatically occur at the time interval you selected.

A screenshot of the 'Card Information' form. It has a dark green background and white text. At the top, it says 'Card Information'. Below this are two radio buttons: 'Debit/Credit Card' (selected) and 'Stored Account'. Below the radio buttons is a checkbox labeled 'I authorize Avon United Methodist Church to collect \$0.00 from my account.' Below the checkbox is a small disclaimer. At the bottom, there is a row of icons: a card, a globe, a musical note, an envelope, and a house. Below the icons are two buttons: 'Submit' and 'Reset'.