

Step 2: Give a Gift to the Fund of Your Choice

This procedure shows you how to set up each of your gifts for online giving.

Note

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

1. On your Home page (Figure 6) or from the **Manage My Account** link, select **Give a New Gift**:



The church funds available for giving are displayed, as shown in Figure 10. Your church determines which funds are listed and available for online giving and the types of contributions (for example, pledge) that you can make to a fund.

The screenshot shows a web interface titled "Select one or More Gifts Below". It features a list of six gift options, each with a blue circular icon containing a white number 1. To the right of each option is a dropdown menu labeled "{Select Gift Type}". At the bottom of the list are two buttons: "CLEAR GIFTS" and "NEXT".

Annotations with arrows point to various elements:

- "List of available funds" points to the list of gift options.
- "Click this icon to view a fund's description" points to the blue circular icon with the number 1 next to the "Offering" option.
- "Select the type of gift" points to the "{Select Gift Type}" dropdown menu for the "Offering" option.
- "Clears all of the entry fields for one or more gifts." points to the "CLEAR GIFTS" button.

Figure 10. Funds Available for Gift Giving

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

Note

Not all gift types are available for all funds.

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

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

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

- If you selected **Recurring**:
 - Specify the payment amount, payment frequency (for example, **Monthly** or **Yearly**), and the start date for making payments.
 - Select the account to charge (the accounts you set up in Step 1 as payment methods are listed in the box).
 - If desired, check the **Remain Anonymous** box.

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

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



The image shows a screenshot of a web form. It features a checkbox on the left with the text "I would like to give this gift on behalf of". To the right of the checkbox is a dropdown menu with a blue header and a white body containing the text "Select an Organization...". A small downward-pointing arrow is visible on the right side of the dropdown menu.

- If you selected **Pledge**:
 - Specify the pledge amount and the start date for making recurring payments.
 - Select the account to charge (the accounts you set up in Step 1 as payment methods are listed in the box) and select the payment frequency (for example, **Monthly** or **Yearly**).
 - If you want to make a downpayment, specify the amount of the payment and select the account to charge. This is a one-time payment that is processed on the current day.

- d. If desired, check the **Remain Anonymous** box.

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

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



- If you selected **One Time**:

- a. Specify the payment amount and the payment date.
- b. Select the account to charge (the accounts you set up in Step 1 as payment methods are listed in the box).
- c. (Credit Card only) If desired, select the check box **Add an Additional Gift** to pay an additional \$3.00 to offset the cost of the processing fees to the church.
- d. If desired, check the **Remain Anonymous** box.

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

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



- f. If you want to provide special instructions to accompany your gift, enter that information in the **Special Instructions for my One Time payment** box (500-character limit). For example, you might include a special note if your gift is in memory of someone, for a second collection, or for payment of a special fee.

3. When you are finished setting up all of your gifts, click .

The **Confirm My Gifts** window is displayed. Do one of the following:

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

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

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

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

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

What Happens If My Gift Payment Cannot Be Processed?

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

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

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

Note

Sage stores credit card and bank account information.

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

Modifying a Payment Method

This section describes how to change the way in which you pay for an Online Giving contribution. Use this method to update a credit card, add a new card, or delete a card that you no longer want to use.

Note

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

Changing a Payment Method

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

1. On your Home page or from the [Manage My Account](#) link, select **My Payment Methods**.

The **Manage My Payment Methods** window (Figure 7 on page 11) is displayed.