

Viewing Your Giving History

You can view a detailed history of all of the contributions that you have made since you began using the Online Giving system.

1. On the Home page (Figure 6) or from the **Manage My Account** link, select **My Online Giving History**:



The **My Online Giving History** window (Figure 14) is displayed:

The screenshot shows the "My Online Giving History" window. It includes a title bar, a "PRINT" button, a "Display 5 records at a time" dropdown, and a table of giving records. Annotations with arrows point to various elements: "Change the number of records on a page" points to the display dropdown; "Column sort" points to the "Gift Name" column header; "Page buttons" points to a circled "12" at the bottom left; "Year-to-Date totals" points to the "Cal. YTD Given" column; "Click either link to view a detailed giving history" points to the "View" links in the "Details" column; and "Total contributions" points to the "Total Given" column.

Gift Name	Cal. YTD Given	Total Given	Details
Building Pledge Fund	\$0.00	\$750.00	View
Church Fund	\$206.00	\$406.00	View
Disaster Relief Fund	\$25.75	\$6,725.75	View
Help Haiti	\$50.00	\$500.00	View
Offering	\$127.25	\$7,027.25	View

Figure 14. My Online Giving History Window

This window lists all of the funds you have given gifts to since you began to use the Online Giving system. You can see year-to-date contribution amounts (**Cal. YTD Given**) and the total amount you have ever contributed (**Total Given**) for each fund.

2. To view a detailed giving history for a specific gift, select the fund link in the **Gift Name** column or select the **View** link in the **Details** column.

The giving history for the selected fund is displayed. For example, Figure 15 shows a giving history for the School Building Growth Fund.

Note

Rejected contributions are identified in red text. They are not included in your giving totals.



Payment Method	Type	Date ▲	Amount	Confirm #
Visa Card - 1111	Pledge	1/18/2011	\$50.00	A1IBM0QbP0
Visa Card - 1111	Pledge	1/18/2011	\$515.00	A1IBM0PbN0
Visa Card - 1111	Pledge	1/18/2011	\$100.00	C1IBA6wCy0

Rejected contributions appear in red text. These are not reflected on your giving totals.

Figure 15. Detailed Giving History for a Selected Fund

This window details your payment methods, the gift type (pledge, recurring, or one time), the dates of contribution, amounts, and the confirmation number for each transaction.

Note that the date range for your giving history defaults to January 1 of the current year to today's date.

- To choose a different date range, click the calendar icons and select the from-to dates. Then, click the **Apply** link.

The information is updated, and contributions for the date range you specified are displayed.

Customizing the Display of Giving History Information

Information about your contributions is initially displayed using the application's default settings. You can change default settings so that information is presented to suit your needs. This section shows you a couple of ways to reorganize the information.

Sorting the Display of Contribution Records

You can sort the records listed by clicking any one of the column headings. A sort icon appears to the right of the column name to indicate the column you are sorting on and the direction of the sort:

▲ : sorts contribution records in ascending order so that successively higher values (numeric or alphabetic) are displayed as you proceed down the page. That is, if the column displays numeric values, they are displayed from higher to lower. If the column displays alphabetic values, they go from Z to A.

▼ : sorts contribution records descending order so that successively lower values (numeric or alphabetic) are displayed as you proceed down the list. That is, if the column displays numeric values, they are displayed from lower to higher. If the column displays alphabetic values, they go from A to Z.

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Figure 12 shows an alphabetic sort in descending alphabetic order on the **Gift Name** column. However, if you have a long list of gifts and want to see when your next scheduled payment is, you may find it more useful to sort on the **Next Gift Date** column to view that information.

Changing the Number of Records on a Page

By default, five records are displayed on a page. To change the number of records displayed on a single page, select the desired option from the **Display** box (see Figure 12). Options range from **5** to **100** records per page.

Paging Through the List

The page buttons (see Figure 12) let you navigate quickly to specific pages in the list. Simply click the desired page number button to display the gifts listed on that page.

Viewing and Printing Contribution Reports

This section describes the types of online giving reports that you can view and print.

Summary Report of Contributions to a Specific Fund

1. Display the **My Active Online Giving** window (Figure 12).
2. Click  (clock icon) for the gift you want to view.

A summary report that shows your contributions to the fund is displayed. This report details your payment methods, the type of contribution, the dates of contribution, amounts, and the confirmation number for each transaction.

Note that the date range for your giving history defaults to January 1 of the current year to today's date.

3. Click the calendar icons to choose a different date range. Then, click the **Apply Filter** link to view information for the date range you specified.

4. Click .

A PDF of your report displayed.

5. At the top of the PDF report viewer, choose any of the following:
 - Click  to print the report.
 - Click  to save a copy of the report.
 - Click  to attach a PDF of the report to a new email message.