

Step 2: Choose a Fund

This procedure shows you how to choose the funds that receive your gifts.

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 4) or from the **Manage My Account** link, select **Give a New Gift**:



The church funds available for giving are displayed, as shown in Figure 11. Your church determines which funds are listed and available for giving and the types of contributions (for example, pledges only) 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 funds, each with a blue circular icon containing a white number 1. To the right of each fund name is a dropdown menu labeled "{Select Gift Type}". At the bottom of the list is a link "display description" and two buttons: "CLEAR GIFTS" and "NEXT". Annotations with arrows point to various elements: "List of available funds" points to the list; "Click this icon to view a fund's description" points to the blue icon next to "Offering"; "Select the type of gift" points to the dropdown menu for "Offering"; and "Clears all of the entry fields for one or more gifts." points to the "CLEAR GIFTS" button.

Fund Name	Gift Type Selection
Building Pledge Fund	{Select Gift Type}
Offering	{Select Gift Type}
Disaster Relief Fund	{Select Gift Type}
Church Fund	{Select Gift Type}
School Building Growth Fund	{Select Gift Type}
Youth Group Trip to Haiti	{Select Gift Type}

Figure 11. Funds Available for Gift Giving

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

Note

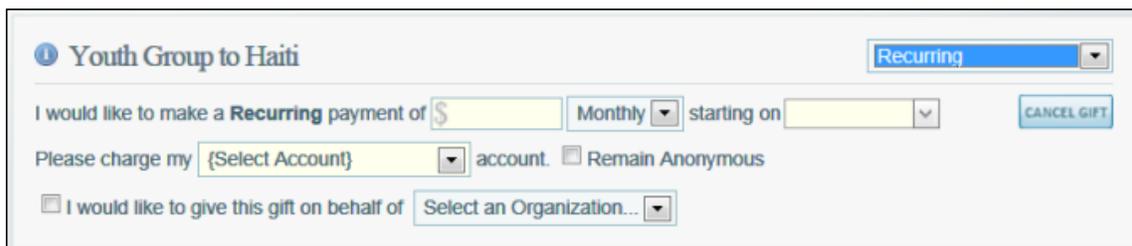
Not all gift types are available for all funds.

- 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**, you see the following:



The screenshot shows a form for 'Youth Group to Haiti' with a 'Recurring' dropdown menu selected. The form includes fields for payment amount, frequency (Monthly), and start date, along with a 'CANCEL GIFT' button. Below these are checkboxes for 'Remain Anonymous' and 'I would like to give this gift on behalf of' with a dropdown menu for 'Select an Organization...'.

- Specify the recurring payment amount, payment frequency (for example, **Monthly** or **Yearly**), and the start date for making payments.

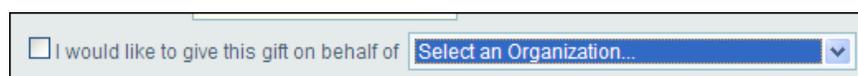
Note

*if your church accepts gifts on certain days of the week or month only, a message is displayed to let you know which days or dates are acceptable. Click **OK** to clear the message. Then, choose an acceptable day.*

- 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 close-up shows the checkbox 'I would like to give this gift on behalf of' and the dropdown menu 'Select an Organization...'.

- If you selected **Pledge**, you see the following:

The screenshot shows a web form titled "Youth Group to Haiti" with a "Pledge" dropdown menu. The form includes fields for "I would like to make a Pledge of \$" and "starting on" (with a calendar icon), a "CANCEL GIFT" button, "Please charge my {Select Account} account \$" and "Monthly" frequency, "I would like to make a down payment of \$" and "using my {Select Account} account", and checkboxes for "Remain Anonymous" and "I would like to give this gift on behalf of" (with a "Select an Organization..." dropdown).

- a. Specify the pledge amount and the start date for making recurring payments.

Note

if your church accepts gifts on certain days of the week or month only, a message is displayed to let you know which days or dates are acceptable. Click OK to clear the message. Then, choose an acceptable day.

- b. 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**).
- c. 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.

A close-up of the checkbox and dropdown menu: I would like to give this gift on behalf of **Select an Organization...**

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- If you selected **One Time**, you see the following:

The screenshot shows a web form for making a one-time payment. At the top, it says "Youth Group to Haiti" with a blue "One Time" dropdown menu. Below that, there's a field for the payment amount (with a dollar sign icon) and a date selector. A "CANCEL GIFT" button is on the right. The next line asks to charge a specific account (with a dropdown menu) and has a "Remain Anonymous" checkbox. Below that, there's another checkbox for giving on behalf of an organization (with a dropdown menu). At the bottom, there's a large text area labeled "Special Instructions for my One Time payment (500 character limit)".

- a. Specify the payment amount and the payment date.

Note

- b. *if your church accepts gifts on certain days of the week or month only, a message is displayed to let you know which days or dates are acceptable. Click OK to clear the message. Then, choose an acceptable day.* 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, check the box to give an additional gift of \$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:

This is a close-up of the checkbox and dropdown menu from the previous form. It shows the text "I would like to give this gift on behalf of" followed by a dropdown menu with the text "Select an Organization..." and a downward arrow.

- 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.

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 .

Note

After you click , the button is deactivated until your gift is processed.

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

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.

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