

OSV Donor Giving Set-up

This document will walk a donor through setting up their giving

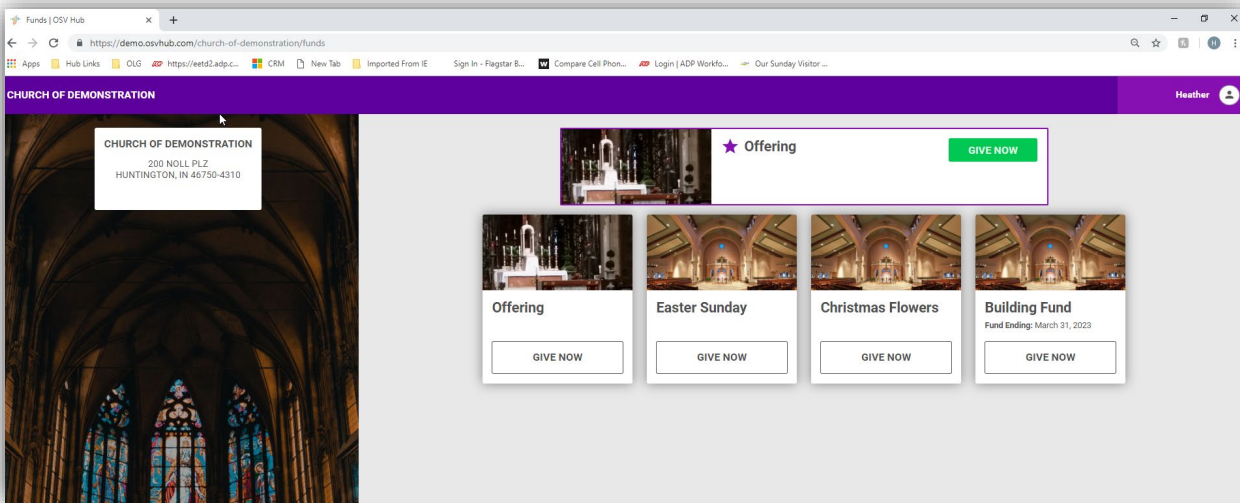
Getting to the E-Giving Website

Click the E-Giving button on the homepage of our website olqpgrafton.org.

Giving – First Time

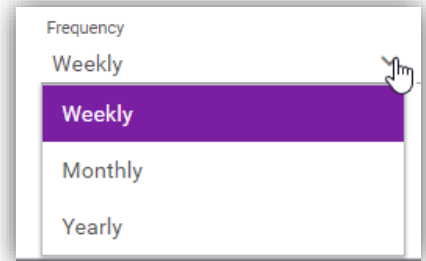
When on our page, you will see the funds that are available to give now or schedule future donations. Creating an account comes up later in these procedures. Do not click the SIGN IN button at this time.

Example of Giving Page below:



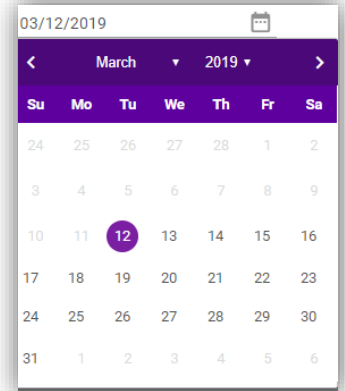
1. Click Give Now on the fund that you would like to donate.
2. Configure Gift
 - a. **Amount** – enter the amount that you would like to donate. You will not enter the dollar sign or commas.
 - i. Gift amounts under \$1,000 will enter the amount one time.
 - ii. Gifts amounts of \$1,000 or higher will be required to enter the donation amount a second time. This is to ensure that you have keyed the correct number.
 - b. **Gift Type** – This is how you want to give to this fund.
 - i. **Recurring** – You can schedule a recurring transaction that will happen as you outline, until you cancel the donation or the organization turns off the fund.

- ii. **One Time** – This donation will only happen one time.
- c. **Frequency** – This will only appear for recurring transactions.
 - i. **Weekly** – This donation will process the same day each week.
 - ii. **Monthly** - This donation will process on the same date each month.
 - iii. **Yearly** - This donation will process the same day each year.
 - iv. If you want to give Bi-Month or a Quarterly, Bi-Annually – you will need to set up multiple donations to the same fund.



d. Date

- i. **Date** – for the One Time donations. The donation will process this date.
- ii. **Start Date** – this is for Recurring donations. The recurring donation will process this date for the first time.
- iii. Click in the date field to open up the calendar. You can select any date today or in the future. You can change the month and year, if needed.



- 1. It is suggested that you enter the date as follows
 - a. For an ACH transaction enter the date the 4 business days before the collection date.
 - i. Ex. If the collection date is Sunday October 27th enter October 22nd as the date the money will be pulled from your account. It takes 4 business days to post to the church’s account.
 - b. For a credit card enter the date 3 business days before the collection date.
 - i. Ex. If the collection date is Sunday October 27th enter October 23rd as the date the money will be pulled from your account. It takes 4 business days to post to the church’s account.

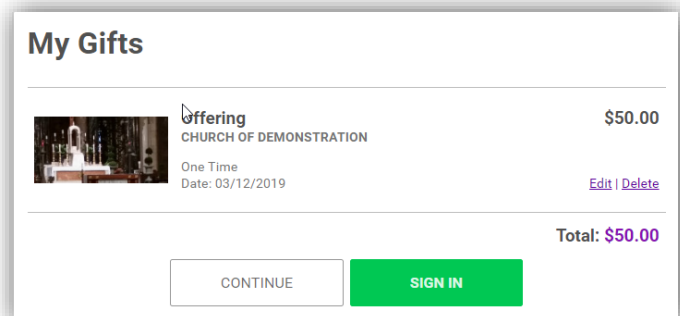
iv. Once the dates are entered the recurring cycle you choose will keep this in sync.

e. Add Gift

- i. Click the green **Add To My Gifts** button
 - 1. If you do not want to add this gift, click the cancel button.

3. My Gifts

- a. The gift will appear on the page for you to verify the information.
- b. Something not correct
 - i. Click **Edit** above the Total to make changes to the gift.
 - ii. Click **Delete** to cancel the gift.
- c. Click **continue** to create an account or do a one time gift.



- 4. Payment Information** – This will allow you to enter your payment information and create an account if you wish.
- First Name
 - Last Name
 - Email – This will be your login, if you choose to set-up an account. You must enter this field even if you do not wish to setup and account.
 - Phone – Not required
 - Payment Information – You will only enter one. You can enter additional accounts later, if you wish.
 - Payment Type
 - Bank
 - Bank Account Type – Checking or Savings
 - Routing Number – Make sure this is from a check, if using a checking account and not a deposit slip.
 - Account Number
 - Or Credit Card
 - Name on Card
 - Card Number
 - Expiration Month
 - Expiration Year
- 5. Payment Method Address**
- Address 1
 - Address2 – if needed
 - City
 - State
 - Zip
- 6. Save My Payment Information**
- If you would like to save your payment method to be used for future donations, check this box. If you wish to create an account you must check this field
- 7. New Password**
- This is only shown and required if you are saving the payment information.
 - Password must be 7 characters
 - Click the green **Submit Your Gift** button

Gift Information
To complete your gift, we need a bit more information

First Name _____ Last Name _____

Email _____ Phone _____

Payment Information

Payment Type: Bank Bank Account Type: Checking

Routing Number _____ Account Number _____

Payment Information

Payment Type: Credit Card

Name On Card _____

Card Number _____ Expiration Month: _____ Expiration Year: _____

Payment Method Address

Address 1 _____ Address 2 _____

City _____ State: _____ Zip _____

Save My Payment Information ?

New Password _____

SUBMIT YOUR GIFT

8. Confirmation

- a. Your gift was submitted and will process on the date you selected.
- b. Click green **Back to Funds List** button to continue giving more gifts. You will now be signed in with the account you just created. Make sure to sign out when you are done

9. Future Gifts:

- a. If you created an account in these previous steps, when you access the site again you can now click the **SIGN IN** button in the top right corner and log in with your username and password.
- b. If you did not create an account you will go through the same steps as before as a guest.
- c. You are not required to setup an account, but you will have to enter payment information every time you submit a gift.

