Donations Training Manual

1. Click on the 'Donations' icon
2. Go to the 'Payment Methods' icon and click on the 'Add Payment Method' button
3. Name and Describe the Payment Method and 'Save'
   a. The most common Payment Methods would include; Cash, Check, and Credit Card, which are already defaulted in the system, but you may add methods such as Direct Deposit, etc.
4. Edit or delete at any time via the 'Edit Pencil' or 'X' icons
5. Go to the 'Add Organization' icon and click on the 'Add Organization' button
6. Add your Organization information, and 'Save'
7. Edit or delete at any time via the 'Edit Pencil' and 'X' icons
8. Go to the 'Donation Funds' icon and click on the 'Add Donation Fund' button
9. Name your Donation
10. Select whether it is 'Active' or 'Inactive' from the dropdown menu
11. Select the appropriate checkboxes for 'Tax Deduction' and 'Available Online'
12. Click on the 'Save' button
13. Edit or delete at any time via the 'Edit Pencil' and 'X' icons
14. Go to the 'Pledge Drive' icon and click on the 'Add Pledge Drive' button
15. Name your Pledge Drive and choose the Total Amount being raised
16. Select the Start and End Date
17. Select whether you want it to end prior if the amount is reached before the End Date via the 'Or until amount reached' checkbox
18. Choose a Fund to associate the Pledge Drive to (this is a required field)
19. Add a Description if desired, and 'Save'
20. Click on the 'Magnifying Glass' icon to view who has given what amount on what date and the total amount given so far
21. Edit or delete via the 'Edit Pencil' and 'X' icons
22. Go to the Reports icon and you may choose from any of the Reports options
23. Select a Start & End date, Campus, and Format, followed by the 'Export' button
24. Go to the Search tab and select criteria from the Filter list followed by the 'Search' button
   a. If you want to do multiple Searches, make sure to click on the 'Reset' button before you do another Search
25. Choose to Export from the Export Result dropdown menu
26. Edit or delete via the 'Edit Pencil' and 'X' icons
27. Go to the 'Statements' icon, 'Statement Header' icon

28. Write your tax ID number and any information you want to show up on your Statement Header, and 'Save'
29. Click on the 'Statement Notes' icon and select the 'Statements' button to write out your Full Export Statement, and 'Save'
30. Select the 'Statement Totals' button to write out your Statement Totals Export, and 'Save'
31. Click on the 'Print Statement' icon
32. Select a Start and End date
33. Select the Statement Type
34. Select 'Print Statement' to print statements or 'Print Label' to print address labels
35. Click on the 'Email Statement' icon and choose your Start and End date
36. Write your Subject, choose your Statement Type, and write your message
37. Choose to 'include email signature and logo' if desired, and 'Email Statement'
38. Go to the 'Record a Pledge' icon and click on the 'Add Pledge' button
39. Select the member who pledged via the 'Member Select' icon
40. Select an Organization (if applicable)
41. Select the Amount pledged, the Start and End dates, or until amount reached
42. Choose the Fund it is associated to, select the Pledge Drive, and 'Save'
43. You may export your pledges via the 'Export' button in Excel, Csv, & Pdf formats
44. Edit or delete via the 'Edit Pencil' and 'X' icons
45. Sort your list via any of the hyperlinked headers
46. Go to the 'Record a Batch' icon and click on the 'Add Batch' button
    a. The system will automatically select 'Add Batch to Service' but if you do not want to connect a Batch to a Service, deselect the checkbox and you can associate the Batch to a specific Date instead
47. Name your Batch, select the Service and Service Date (if applicable)
48. Choose a Campus, and Fund
49. Click on the 'Add Donation' button
50. The system will fill in the fields that are associated to the Service
51. Select a Member via the 'Member select' icon, and type in the Amount
52. Select Payment Method, Organization and/or Pledge Drive (if applicable)
53. Click on the 'Add Donation' button to add more Donations to your Batch
54. When you're finished adding Donations to your Batch, click on the 'Save' button
    a. Once you have saved your Batch, you will see it listed with the rest of your Batches
55. Edit a Batch via the 'Edit Pencil' icon to edit the Donations within a Batch or change the Batch information
56. Once you update or make any changes, click on the 'Update' button to save your changes
57. Delete via the 'X' icons

58. Sort your list via the hyperlinked headers
59. Go to the 'Record a Donation' icon and click on the 'Record Donation' button
60. Select the Member and Organization (if applicable)
61. Choose the Amount and Date
62. Click on 'Show more options' to view more options, if desired
63. Fill out additional fields, and click on the 'Make Donation' button
64. Click on 'Split' if you wish to split the Donation
65. Filter the page via any of the hyperlinked headers
66. Edit or delete via the 'Edit Pencil' and 'X' icons
67. Go to the 'Online Giving' icon
    a. If you do not have a 3rd party gateway to process online payments, click on the 'Purchase Payment Gateway' button and purchase an Authorize.net account
    b. Then click on the 'Payment Gateway Information' button and input your API Login ID and Transaction Key and 'Save'
    c. Click on the 'Online Giving Form' button and copy and paste the online donation code into your church website
        i. This will be the 'Online Giving' button that your members will use for online donations
    d. Click on the 'Church URL' button to enter in your preferred url link that will redirect your givers after they have finished their online donation, and 'save'

68. To merge an online donation to a member, click on the 'Member Select' icon to the right of the Donation, type and select the name, and 'Add'
69. Multi-merge to multiple donations via the 'Multi Merge' button
70. Select the Donation checkboxes you want to multi-merge
71. Click on the 'Multi Merge' button
72. Type in the name of the member you want to merge them to, and 'Save'