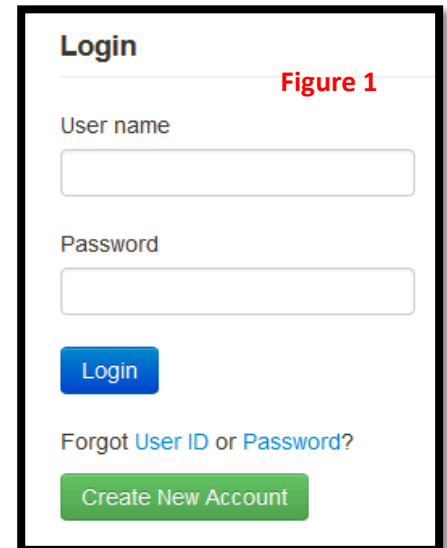


1. What do I need to get started

- Welcome Email from Our Sunday Visitor that will contain information you need to setup and access your Online Giving Account.

2. Setting Up Your Online Giving Administrative Account

- Click on URL in welcome email from Our Sunday Visitor.
- Click on **Create New Account** found under the Existing User Login on your landing page. **Figure 1**



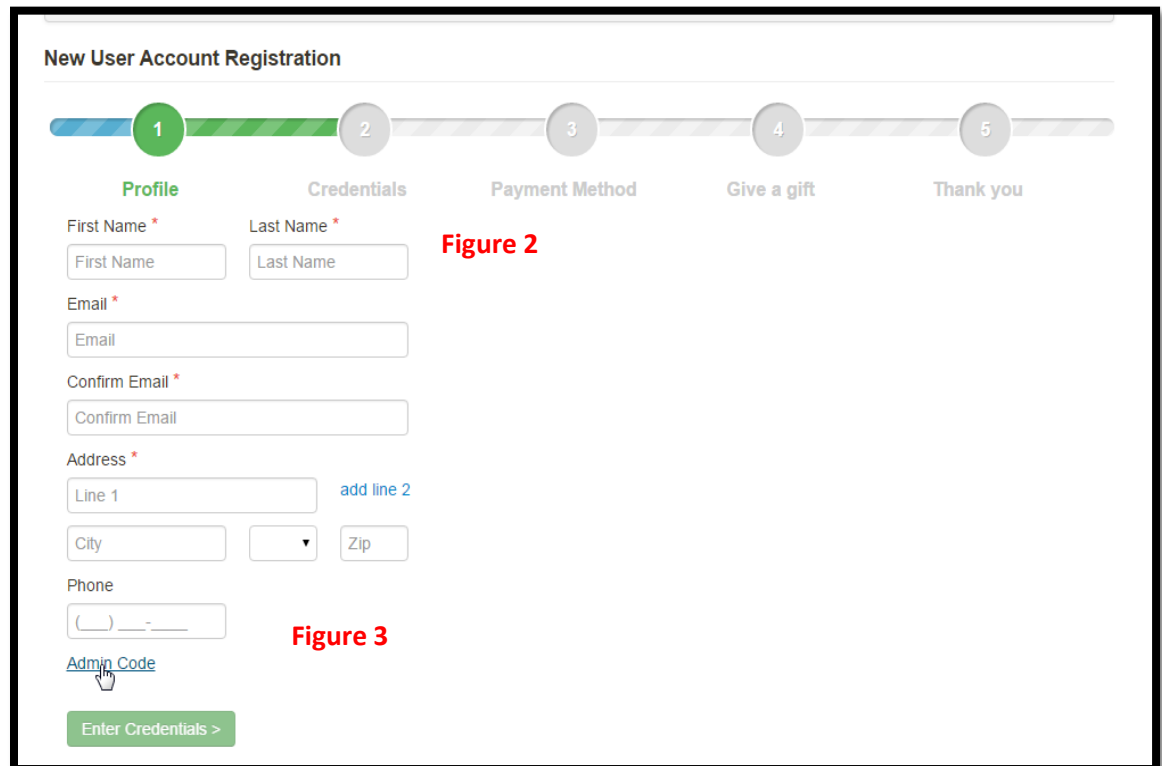
Login **Figure 1**

User name

Password

[Forgot User ID or Password?](#)

- Enter your name, email and address a phone number is not a required field. **Figure 2**



New User Account Registration

Progress: 1 (Profile) | 2 (Credentials) | 3 (Payment Method) | 4 (Give a gift) | 5 (Thank you)

Profile

First Name * Last Name * **Figure 2**

Email *

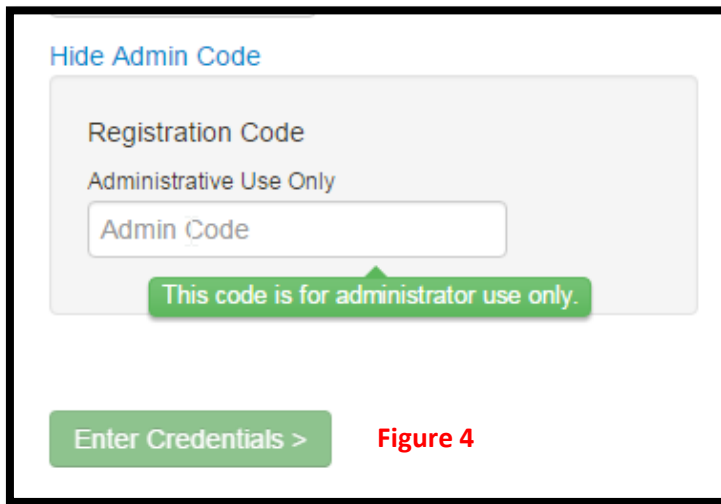
Confirm Email *

Address *
Line 1 [add line 2](#)
City Zip

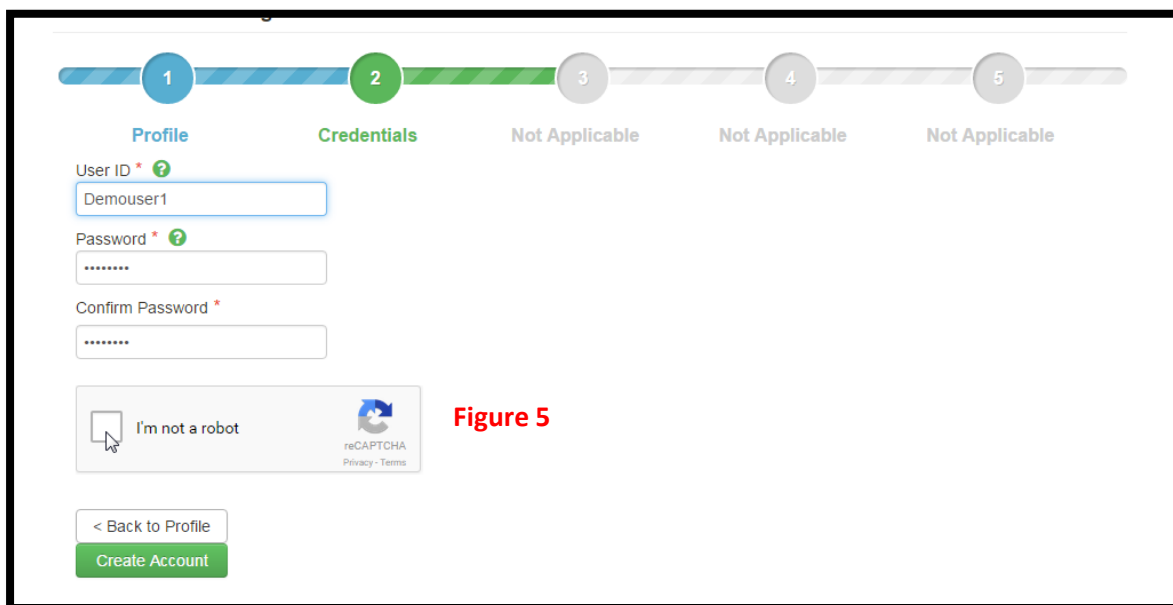
Phone

[Admin Code](#) **Figure 3**

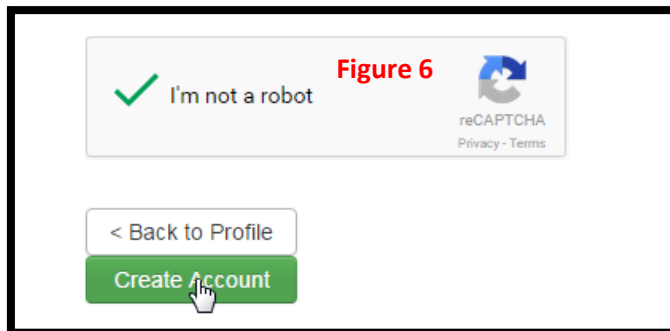
- To open the area for entering the **Registration Code** you will need to click the word **Admin Code** **Figure 3**. The code is found in the Welcome Email from OSV. If you do not key in this code, you will create a donor account instead of an administrative account. This code can be used to set up as many administrative accounts as needed. Please note that an email address can only be used to set up one account.



- You can then click the green box **Enter Credentials** **Figure 4**
- You will create your own User ID (must be 6 – 35 characters and may contain numbers, alpha and the following symbols !&@*) and your own password (must be between 8-16 characters and may contain numbers, alpha and the following symbols !&@*). Then click the box that says **“I’m not a robot”** **Figure 5**. Then click green button **Create Account** **Figure 6**.



- ❑ Once you have completed *the New User Account Registration*, you will receive an e-mail to validate your account. This is to ensure that you have entered the email address correctly. You do not need to click the link in your email to validate your account.

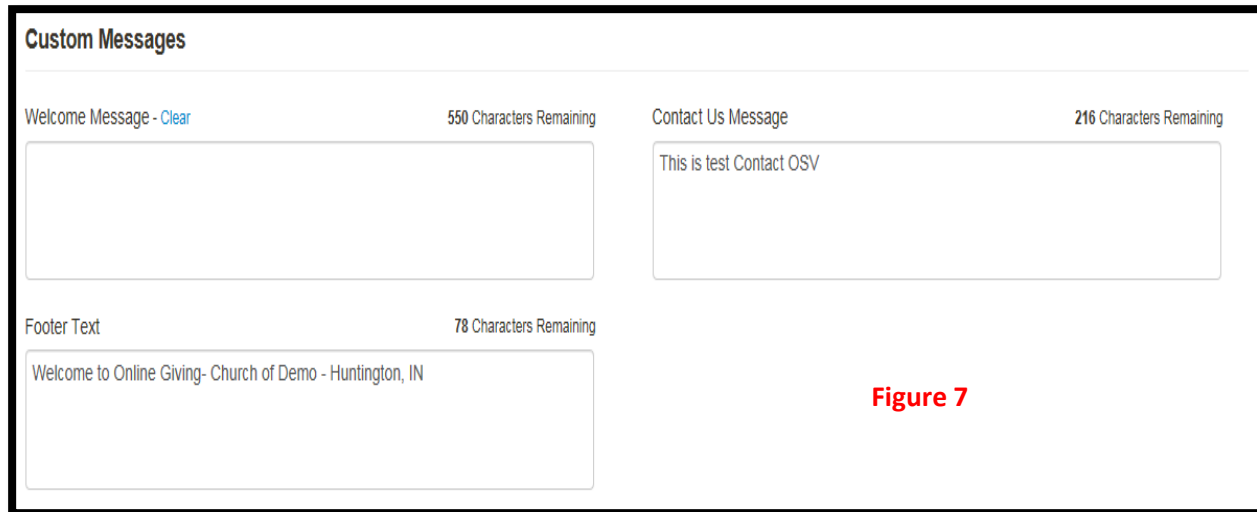


3. Setting-Up Your Online Giving Page

- ❑ Go to your organization's online giving page. The URL that was sent to you by OSV. This link will take you to the login screen.
- ❑ Login using your administrative account that you just created.

4. Church Details

- ❑ Click on *Church Details*
 - **You must fill in anything that has a red ***
 - Church Name – This should be the church name in your Sage Account.
 - Phone – Phone number to appear on the contact page for the donors to call.
 - Email – This is the email address that will appear on the contact us page. It is also the email address that is used in the email communication for the Online Giving System. This should be an email for the church and not Our Sunday Visitor.
 - If you are managing donors, you will need to enter an email address for all communications for the managed donors to go to. This will be an email for the organization and not the donor. You will receive all communications that your donor would receive if they had been managing the account.



Custom Messages

Welcome Message - [Clear](#) 550 Characters Remaining

Contact Us Message 216 Characters Remaining

Footer Text 78 Characters Remaining

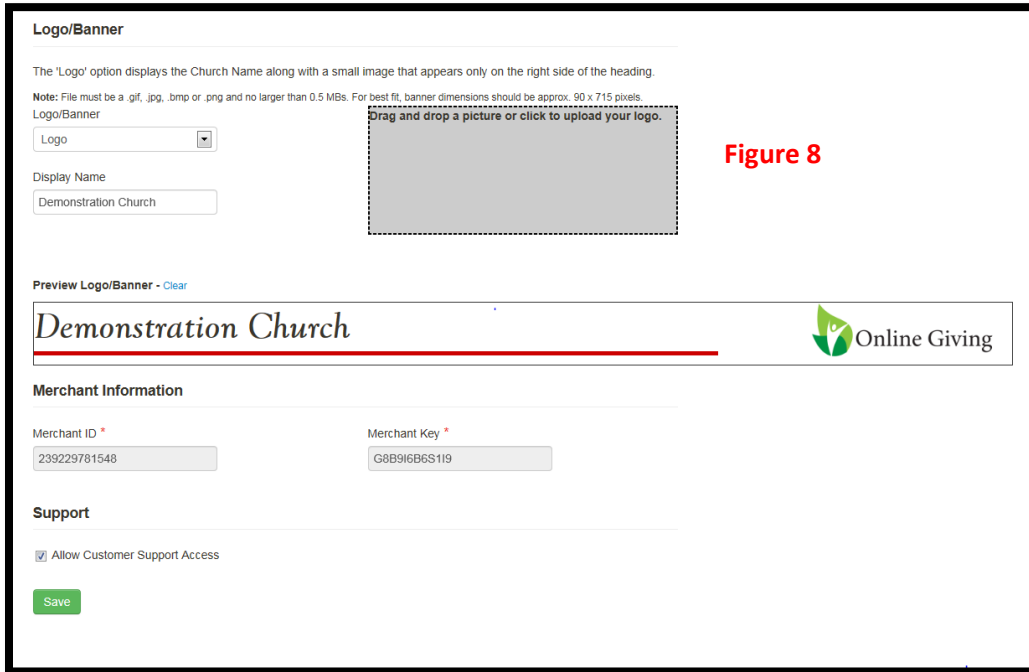
This is test Contact OSV

Welcome to Online Giving- Church of Demo - Huntington, IN

Figure 7

Custom Messages – You can come back at any time and change the messages. They do not have to be done right now. **Figure 7**

- **Welcome** – This is the location that you key in a custom message. If you do not have a message keyed in, the default message will appear. (You cannot format this text. It will appear as a paragraph even if you add spacing.)
- **Contact Us Message** – This is the message that appears on the Contact us Page. Some churches will add a note here with contact information for Tech Support.
- **Footer Text** – This information will appear at the bottom of each page. We recommend putting your Organization’s name and city with state.



Logo/Banner

The 'Logo' option displays the Church Name along with a small image that appears only on the right side of the heading.

Note: File must be a .gif, .jpg, .bmp or .png and no larger than 0.5 MBs. For best fit, banner dimensions should be approx. 90 x 715 pixels.

Logo/Banner


Logo

Drag and drop a picture or click to upload your logo.

Display Name

Demonstration Church

Preview Logo/Banner - [Clear](#)

Demonstration Church  Online Giving

Merchant Information

Merchant ID *

Merchant Key *

Support

Allow Customer Support Access

Figure 8

Logo/Banner

▪ **Logo/Banner –**

- **Logo** – This is the location that you decide if you want to load a logo (right corner of the screen.)
- **Banner** – This will replace the red line, Organization Name and Logo. It will be the length of the red bar.
- **To load the logo/banner** – Drag and drop file into the gray box or click the box to upload your file. **Figure 8**
- **Display Name** – This is the name that you want to display on your Online Giving page and the App. Your logo and banner do not appear on the App

Merchant Information – This was keyed in by tech support. This is your Sage information that identifies your account with the payment processor. This cannot be changed by you.

Support – This check box allows Support to log into your account as an administrator and assist you or your donor. If you do not want support to be able to do this, uncheck the button. Please keep in mind that we may not be able to assist you with your issue if we do not have access.

Click Save

Setting-up Payment Methods

- Click on **Payment Settings**
- Accepted Payment Methods** **Figure 9**
 - Select the payment methods that your organization will be accepting
 - Bank Accounts – Checking & Savings
 - Credit Cards – Visa & MasterCard
 - American Express – You must have applied for this option and signed a separate section on the application.
 - Discover
 - If a payment method is disabled, your account has not been approved for accepting payments using this method. If you would like to use this method, please contact Our Sunday Visitor.
- Contribution Frequencies** **Figure 10**
 - This is how often you are going to allow your donors to give. The more options you select, the more flexible it is for your donors.
 - Your options are: Weekly, Biweekly, Monthly, Twice a Year, Yearly and Quarterly.
- Accepted Days of Giving** **Figure 11**
 - This is only used if you are going to limit the day of the week that your givers can choose: One Time, Weekly, Biweekly, etc.
 - This may cut down on the batches that your organization may have, but can also be less flexible for your givers.
 - Please call Online Giving Support with any questions that you may have on this section at 800-348-2886 Opt 4
- Quick Give**
 - This feature is defaulted to **Off**. Click on the drop down arrow to turn the feature **On**. This feature must be turned on to set up and accept funds using Quick Give. Please see the quick give section for more details on this feature.

Figure 9

Accepted Payment Methods *

Select at least one Payment Method for service turned on. If a Method is checked

- Bank Accounts (EFT)
- Credit Cards (Visa/MasterCard)
- Accept Discover Card
- Accept American Express

Contribution Frequencies *

Select at least one Contribution frequency to be changed.

- Weekly
- Bi-Weekly
- Monthly
- Quarterly
- Twice a Year
- Yearly

Figure 10

Accepted Days for Giving *

For One Time, Weekly and Biweekly then all days will be accepted.

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Figure 11

- Click Save and your Payment Settings are all set**
 - You may come back and make changes prior to releasing Online Giving to your donors.

5. Setting-up Funds or Collections

Figure 12

Your funds page will be blank. You will need to set up your collections prior to releasing Online Giving to your donors.

Click on **Church Funds**

- This section will be completely blank when you start your set up. You will need to add all the collections that you wish to make available for your donors.
- Click on **Add New Fund** **Figure 12**
 - Add Fund (Collection) Entry screen will pop up.
 - Each time you add a new fund, it will appear on top. We suggest that you start with the collections you wish to appear on the bottom first. Please contact your envelope company for a complete list of your collections if you need a list in date order.
- Fund Name – Figure 13** This is what you want to call the collection. This is required to match the Fund Name or Activity Name in some software. Please verify this information prior to completing this information.
- Fund Number – Figure 13** This is the fund number from your contribution software. Please check your software to see if this is required to import contributions.
- Visibility – Figure 13** This is only available if managed givers are turned on.
 - **Public** – Anyone can donate to the fund.
 - **Private** – Only Managed Givers can donate to this fund.
- Active** **Figure 13**
 - **Active** – Your donors can see this fund and donate to it.

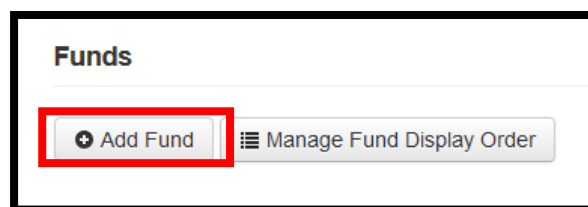
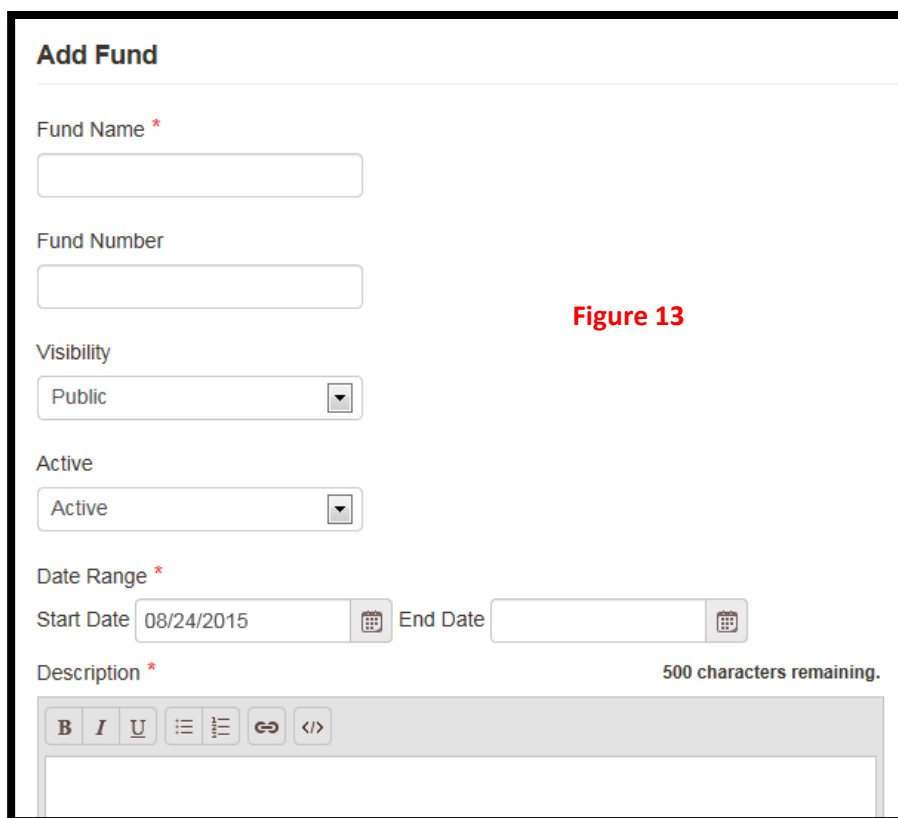
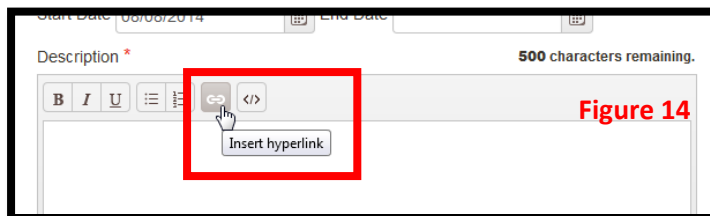



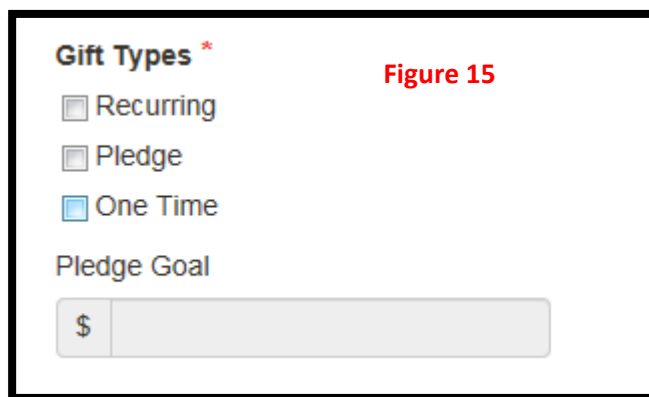
Figure 13

- Inactive – Your donors cannot see this fund and cannot donate to it. You cannot change this status at this location
- ☐ **Date Range – Figure 13** This is the date range that you want your donors to be able to view the collection.
 - Many churches are not putting dates in this field and allowing the collections to be seen all the time.
 - If you add an end date, your collection turn off automatically at the end of this date and no more donations will be collected.
 - After a collection ends, you can go back into the fund and but a new date range for the fund to be active.
- ☐ **Description – Figure 13** This is what you want your donor to know about the collection.
 - You can click on the globe link to add a web address link.
 - On your monthly collections, you may want to let your donors know which Sunday of the month the collection is normally taken up.
 - On one time collections, you may want to let your donor know the date of the collection.
- ☐ **Add Hyperlink – Figure 14** You can add a hyperlink to a fund description if you wish. This will add a link in the description that will open a new window for the donor to view the page that you have linked to.

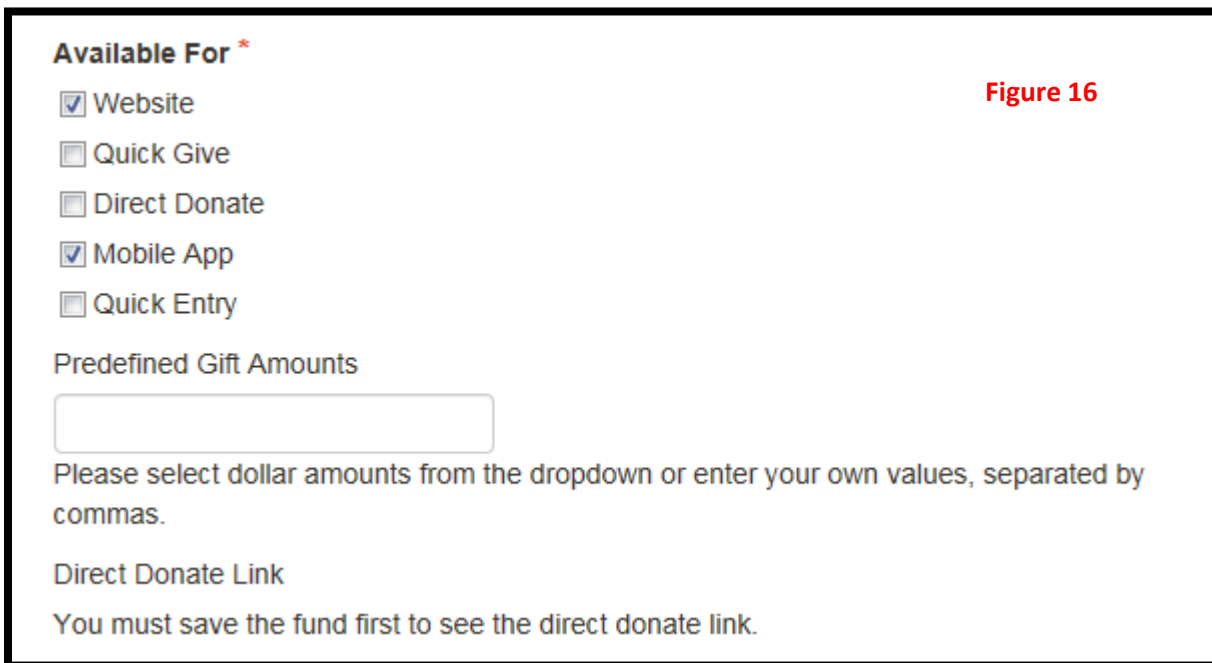
- Click Add Hyperlink
- Fill in the URL -
- Link Message – this is the text that you will click on to take you to the link.



- ☐ **Gift Types – Figure 15** This is how you are going to allow your donors to give to a fund.
 - **Recurring** – This is used for funds that you want your donors to give to over and over again. This is normally used for things like weekly collections and monthly collections. Organizations are also using this for Christmas, as it is the same time every year and the donors can choose the yearly option.
 - **Pledge** – This is used for collections such as capital campaign, and many stewardship organizations give this option for weekly collections. This will allow donors to make their pledge of treasure.



- **One Time** – This is used for one time gifts such as Diocesan Collections, Ash Wednesday, Easter and so on. This option also has a place for the donor to send the organization a note, so it can be used for things like Mass Intentions. You will want to run a special instruction report to get the messages from your donors.



Available For *

Website

Quick Give

Direct Donate

Mobile App

Quick Entry

Predefined Gift Amounts

Please select dollar amounts from the dropdown or enter your own values, separated by commas.

Direct Donate Link

You must save the fund first to see the direct donate link.

Figure 16

Available For Figure 16

- **Website** – Check this if you want donors to be able to give via the website to this fund.
- **Quick Give** – This is used for funds that you want to allow donors to donate to without creating an account. You can make a fund available for Quick Give and for donors to donate to if they have created an account. This is a good option for special events, bible school and Mass intentions to name a few. This is only a one time donation that happens right now.
- **Direct Donate** – This is used for donations directly to a fund, tuition or special event. Direct Donate will give you a URL that you can save directly onto a website, that when clicked by a donor the link will take them directly to the fund to donate or page to submit a payment to. This is only a one time donation that happens right now.
 - Predefined Gift Amounts must be entered
 - Your link will appear after you hit the save button and come back into the fund.

- **Mobile App** – This makes the fund available on the mobile app.
 - **Quick Entry** – You will only see this option if Quick Entry is turned on for you. This makes the fund available for quick entry. This is a feature that you may need if you are managing large numbers of giver accounts. (Managed Givers)
 - **Predefined Gift Amounts** – This is only for Direct Donate. You must select dollar amounts from the dropdown or type in dollar amounts. The Other option will automatically appear and should not be entered into this box.
-
- Tax Details** – This should be checked for all collections that are tax deductible.
 - Click Save**

You now have everything set-up that must be done to start collecting donations online. You will now want to share your URL with your webmaster to be added to your webpage.

6. Marketing Online Giving – If you have not done so already, you may want to do some of the following:

- Mailing to Donors Promoting Online Giving**
 - Mailings can take several weeks to be set up, proofed, printed and mailed. You will need to start planning your mailing early.
 - Contact your Electronic Specialist at 800-348-2886 Ext 2127.
- Add “I Give Online” and a check box to your offering envelopes.** You may also want to add; *To sign-up, please visit www.your-web-address*
 - Contact your Electronic Specialist at 800-348-2886 Ext 2127.
- Bulletin Announcements**
 - Plan your first bulletin announcement to coordinate with your mailing.
- Utilize our Customer Portal**
 - For valuable information, ideas, logo, videos and more go to osvoffertory.com and click on the customer login in the upper right hand corner.