

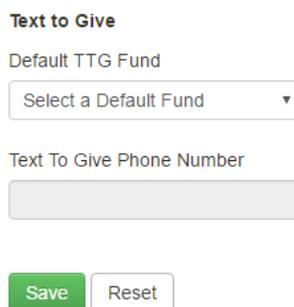
## ADMINISTRATORS

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Congratulations, Text to Give has been setup for your organization! Before your donors can give using text messages, there are a couple of items that need configured.

### Viewing your Text to Give number and setting a default fund

1. Go to the **Payment Settings** page and find the **Text to Give** section:



**Text to Give**

Default TTG Fund

Select a Default Fund ▼

Text To Give Phone Number

Save Reset

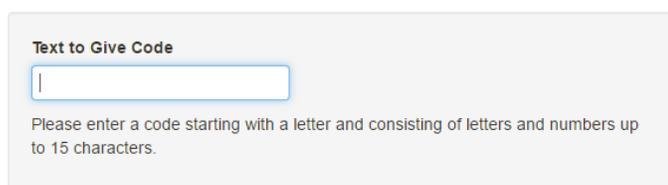
2. Your organization's phone number will be displayed in the box below **Text to Give Phone Number**.
3. To enable donors to text to a default fund by just texting an amount, use the **Default TTG Fund** dropdown to select a default fund and click **Save**.

### Setting Text to Give codes for funds

The way that you can make funds available for Text to Give is to either set a fund as the default fund (see above) or by specifying a code for a fund. The code can then be used by a donor when they text to designate where they want their gift to go.

A Text to Give code must start with a letter and can be made up of letters or numbers (no spaces, special characters, or punctuation). Capital and lower case letters are treated as the same so if the code is "flowers", it does not matter if the donor texts "Flowers" or "FLOWERS", it will match the code "flowers". As a best practice, short, concise codes are preferred as they are easier to text. For example, if you have a maintenance fund and there is a problem with the air conditioning, instead of using "MAINTENANCE" for the fund code, use "AC" instead. It is clear, appeals to the current need, and is easier to text.

1. Go to **Funds** and select the fund you want to setup a code for.
2. Find the **Text to Give Code** section and enter in the code for the fund:



**Text to Give Code**

Please enter a code starting with a letter and consisting of letters and numbers up to 15 characters.

3. Click **Save**.

## DONORS

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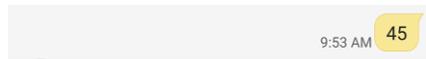
Donors can use Text to Give whether they are existing Online Giving users, new to Online Giving, or guests. All that a donor needs is the organization's Text to Give number and, optionally, the codes for the available funds.

### Starting a gift

The donor can start a gift by texting a message to the organization's Text to Give number. The text message can be one of two types.

#### Type 1 – AMOUNT

The first type is texting an amount only. This message makes a gift for the specified amount to the default fund. An example of this type of message is:

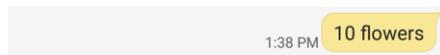


This message makes a gift of 45 dollars to the default fund. The amount can be formatted or a simple number. Examples of valid amount formats include:

- 50
- \$50
- 49.95
- 1,500

#### Type 2 – AMOUNT CODE

The second type includes both the amount and code for the fund for the gift. The code allows the donor to designate their gift. An example of this type of message is:



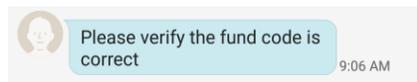
This message makes a gift of 10 dollars to the fund with the code "flowers". The same options to format the amount apply to this type of message as well.

### Responses from Online Giving

Once Online Giving receives the text message, it will respond to the donor based on a number of things.

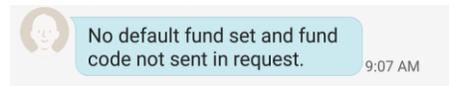
#### Invalid fund code

If the system does not recognize the fund code, the system will return an error message asking the user to verify the fund code:



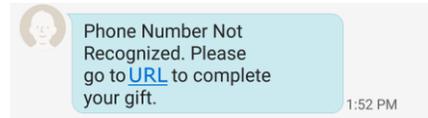
### No fund code specified and no default fund setup

If no fund code is specified in the message and no default fund is setup, the system will return an error message letting the user know that there is no default fund set:

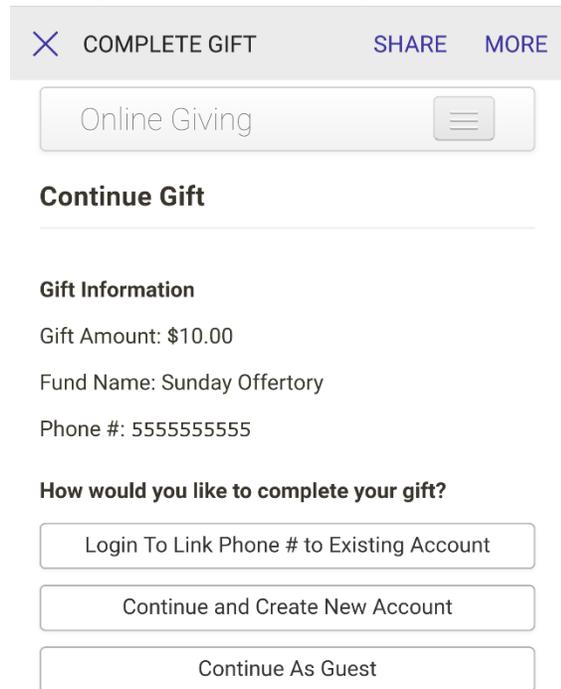


### Phone number not recognized

If the phone number is not associated with a valid user in the system, the system will return the following message asking the user to continue to the website to complete their gift:



Tapping the URL in the message opens the Online Giving system to continue the gift:



The donor has three options:

1. Login to link the phone number with an existing account – used when the donor has an existing account but their mobile number is not associated with their Online Giving account.
2. Continue and create new account – used when the donor wants to create an account to be able to save their information for use later with future gifts.
3. Continue as guest – used when the donor wants to make a gift but does not to create an account.

*Login to link phone number to existing account*

Selecting the **Login To Link Phone # to Existing Account** button takes the donor to a login screen. Once logged in, the donor is able select their payment method and complete their gift.

Online Giving

**Continue Gift**

**Gift Information**  
Gift Amount: \$10.00  
Fund Name: Sunday Offertory  
Phone #: 2604797620

Confirm and link 2604797620 to your account.

*Linking phone number to account*

Online Giving

**Continue Gift**

**Gift Information**  
Gift Amount: \$10.00  
Fund Name: Sunday Offertory  
Phone #: 2604797620

Visa-1111

Complete Gift

*Selecting a payment method and completing gift*

*Continue and create new account*

Selecting the **Continue and Create New Account** button takes the donor to an account creation wizard.

**New User Account Registration**

- Profile
- Credentials
- Payment Method
- Give a gift
- Thank you

First Name \*  
Last Name \*  
Email \*  
Confirm Email \*  
Address \*  
Phone  
(555) 555-5555

Enter Credentials >

**New User Account Registration**

- Profile
- Credentials
- Payment Method
- Give a gift
- Thank you

User ID \*  
Password \*  
Confirm Password \*

< Back to Profile Create Account

**New User Account Registration**

- Profile
- Credentials
- Payment Method
- Give a gift
- Thank you

You've successfully created an Online Giving Account. Add a payment method to your account so you can start giving.

Add Bank Account Add Credit Card

Bank Name \*  
Bank Account Type  
Routing Number \*  
Confirm Routing Number \*  
Account Number \*  
Confirm Account Number \*

Continue to Gift

**New User Account Registration**

- Profile
- Credentials
- Payment Method
- Give a gift
- Thank you

Gift Summary:  
I would like to make an Immediate Gift of \$15.00 to fund.  
Please charge my Visa payment method immediately on 1/20/2017, 3:45:27 PM.

Submit Gift

**New User Account Registration**

- Profile
- Credentials
- Payment Method
- Give a gift
- Thank you

Your gift has been submitted

**Thank you for creating a new Online Giving account.**  
A confirmation email has been sent to your email address.

## Continue as guest

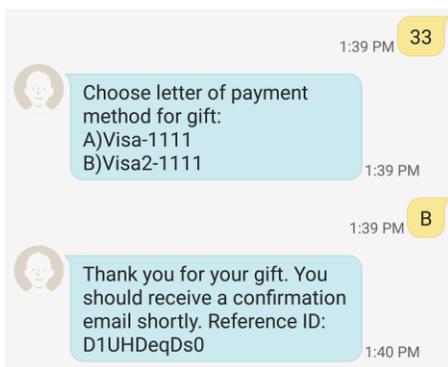
Selecting the **Continue As Guest** button takes the donor to a wizard to complete their gift.

The image displays four sequential screenshots of a mobile application's 'Give As Guest' wizard. Each screenshot shows a progress indicator with four steps: 1. Profile, 2. Payment Method, 3. Give a gift, and 4. Thank you.

- Screenshot 1 (2:13 PM):** Step 1 is active. Fields include First Name, Last Name, Email, Confirm Email, Address (Line 1, add line 2, City), Zip, and Phone ((555) 555-5555). A green button at the bottom says 'Enter Payment Information >'. A 'Continue to Gift' button is visible at the bottom of the screen.
- Screenshot 2 (2:56 PM):** Step 2 is active. A message says 'Please enter the payment method information for this gift.' Below are buttons for 'Add Bank Account' and 'Add Credit Card'. Fields include Bank Account Type (Select), Routing Number, Confirm Routing Number, Account Number, and Confirm Account Number.
- Screenshot 3 (2:58 PM):** Step 3 is active. A 'Gift Summary' box shows: 'I would like to make an Immediate Gift of \$15.00 to fund. Please charge my payment method immediately on 1/20/2017, 2:58:13 PM.' A green 'Submit Gift' button is at the bottom.
- Screenshot 4 (4:36 PM):** Step 4 is active. A green message says 'Your gift has been submitted.' Below is a 'Thank you for your gift.' message and a note: 'A confirmation email has been sent to your email address.'

## Phone number recognized, multiple payment methods

If the phone number is associated with a valid user in the system and that user has multiple valid payment methods, the system will send a message back asking which payment method to use. The donor can then respond with the letter associated with the payment method they want to use. The system will then process their gift for the specified amount to the appropriate fund with the selected payment method and send a message back with a receipt number.



### Phone number recognized

If the phone number is associated with a valid user in the system and that user has a valid payment method, the system will process their gift for the specified amount to the appropriate fund and send a message back with a receipt number.

