

Online Giving Release Notes

New Features

New User Registration Process

In an effort to help new donors get setup in Online Giving, a new registration wizard has been created.

Login

User name

Password

[Login](#)

[Forgot User ID or Password?](#)

[Create New Account](#)

The landing page for Online Giving has been updated with a new “Create New Account” button to start the registration process. To make the sign up process easier for new users, the user registration process is now a wizard with the following steps:

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

The first step of the registration has them fill out their profile information:

New User Account Registration

1 2 3 4 5

Profile Credentials Payment Method Give a gift Thank you

First Name * Last Name *

Email *

Confirm Email *

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

Phone

Admin Code

[Enter Credentials >](#)

The second step, credentials, has the donor setup their user ID and password:


New User Account Registration

1 Profile 2 Credentials 3 Payment Method 4 Give a gift 5 Thank you

User ID * ?

Password * ?

Confirm Password *

I'm not a robot  reCAPTCHA
[Privacy - Terms](#)

< Back to Profile **Create Account**

Once the complete the credentials step, their account has been created. The remaining steps walk them through setting up a payment method and their first gift.

In the third step, the donor is able to setup a payment method:

Bank Account

New User Account Registration

1 Profile 2 Credentials 3 Payment Method 4 Give a gift 5 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 *

Create Payment No Thanks

Or credit card:



New User Account Registration


1 Profile 2 Credentials 3 **Payment Method** 4 Give a gift 5 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](#)

Accepted Cards



Card Nickname * 

How will you refer to this card?

Use Alternate Address

[Create Payment](#) [No Thanks](#)

If a donor does not want to setup their payment method at this time, they can click on the “No Thanks” link and it will take them to their home page as usual.

The fourth step allows them to setup a gift and walks them through prompts about their gift:

New User Account Registration


1 Profile 2 Credentials 3 Payment Method 4 **Give a gift** 5 Thank you

Your payment method was saved. Let's create your first gift.

Start by selecting a fund:


Weekly Offering

This donation is taken up weekly for support of the church

Select A Gift Type: 

Recurring

What is the amount you'd like to give? * \$ 100

What date should this recurring gift start? * 9/13/2015 

How often would you like these gifts to occur? * Weekly

Gift Summary:

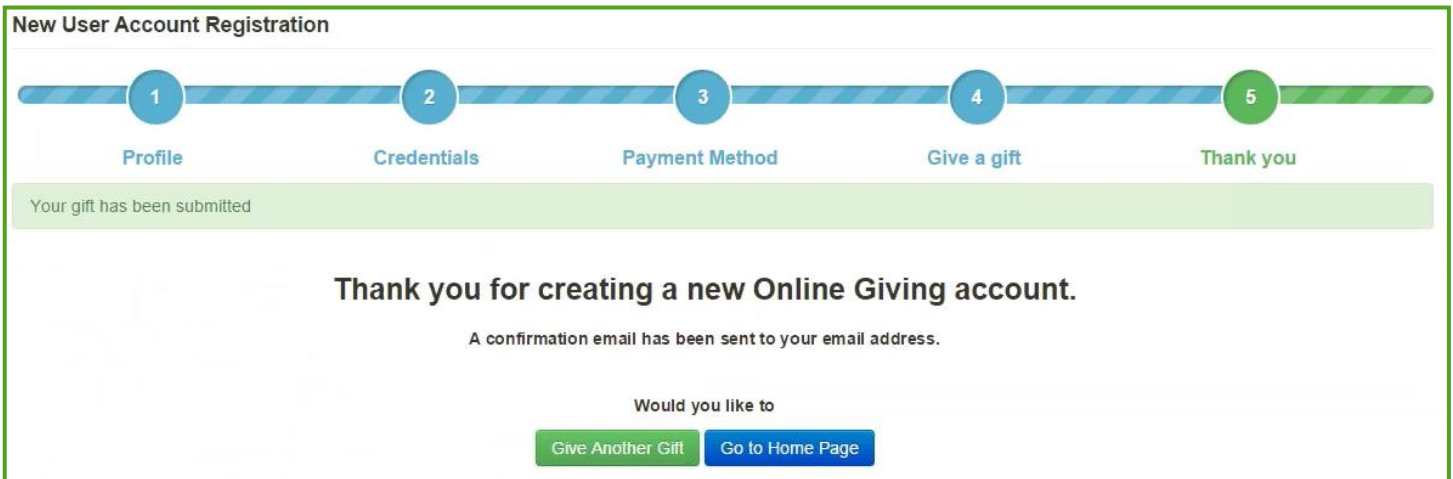
I would like to make a Recurring Gift of \$100.00 to Weekly Offering.
Please charge my Visa payment method Weekly starting on 9/13/2015 .

[Submit Gift](#) [No Thanks](#)

***Note: The pledge calculator is not in this give a gift step, if they wish to use that tool they will need to login to their account and go through that give a gift process to do so.

Again, if a donor does not want to setup a gift at this time, they can click on the “No Thanks” link.

Once they click the Submit Gift button, they will get the Thank You step:



The screenshot displays the 'New User Account Registration' process. At the top, a progress bar consists of five numbered steps: 1. Profile, 2. Credentials, 3. Payment Method, 4. Give a gift, and 5. Thank you. Step 5 is highlighted in green, indicating it is the current step. Below the progress bar, a green banner states 'Your gift has been submitted'. The main content area features the text 'Thank you for creating a new Online Giving account.' followed by 'A confirmation email has been sent to your email address.' Below this, a prompt asks 'Would you like to' with two buttons: 'Give Another Gift' (green) and 'Go to Home Page' (blue).

The donor will receive an email at the final step letting them know that their gift was set up.

From the Thank You step, they can choose to either setup another gift right away or to be taken to their home page.

Enhancements

New Timeout Warning on Givers Page

Have you ever been updating the envelope numbers on the Givers page and have spent an half hour or more keying in data just to click Save and be logged out? Well now you will get a warning that your session is going to expire and will allow you to continue and not lose any changes

Option to Create Account after a Quick Give

Quick Give now has an option similar to Direct Donate where after a donor makes a gift, they can choose to go ahead and setup an account.

Bug Fixes

- Fixed issue with donor sometimes gets a 404 error when editing a gift
- Added installment amount to a donor’s gift confirmation for a pledge
- Fixed report totals not matching for the Giving Detail and Giving Fund reports
- Fixed issue with fund descriptions truncating
- Fixed issue where deactivated donor names are on the Giving Status report