shelby

v.5

How to Use

e-Give

Introduction

e-Give is an online giving application that allows your organization to accept contributions from *anyone* 24 hours a day, 7 days a week. Individuals can make one-time or recurring donations from their checking, savings, or credit card accounts.

e-Give is completely secure, as our payment processors are PCI (Payment Card Industry) compliant. Your credit card or banking information is stored on the payment processor's secure servers to ensure that your sensitive information is kept safe. In addition, e-Give uses SSL encryption and HTTPS-secured access protocols to prevent malicious activity and identity theft.

Requirements

Your organization must own the e-Solutions (ShelbyWEBVIEW) and either the Contributions or Donors and Gifts applications to use e-Give.

Getting Started

To get started with e-Give, export your purposes and configure your e-Solutions to accept online donations. Then, members and guests will be able to make gifts online. Registered users are also able to login, view transaction history, and print contribution statements.

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Export Contribution Purposes

The first step to using online giving is to export your contribution purposes to e-Give. You also need to select the frequencies that contributors can use to make automatic recurring gifts. See the *Create an Automatic Recurring Gift* section of this document to learn more about recurring gifts.
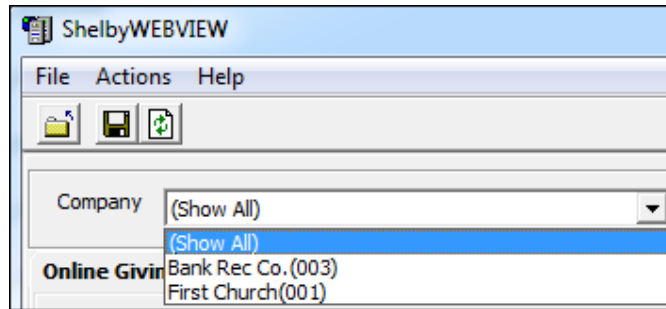
1. Start Shelby v.5.
2. Click on the **ShelbyWEBVIEW** link.
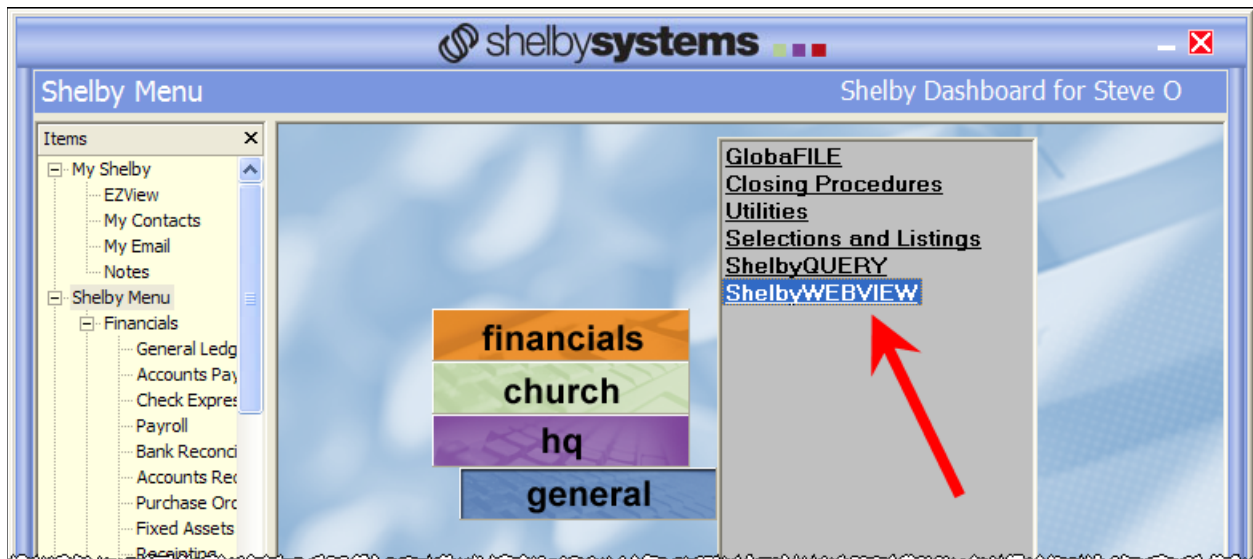
3. Log in using your administrator **Login ID** and **Password**.
4. Click on the **Online Giving** link.
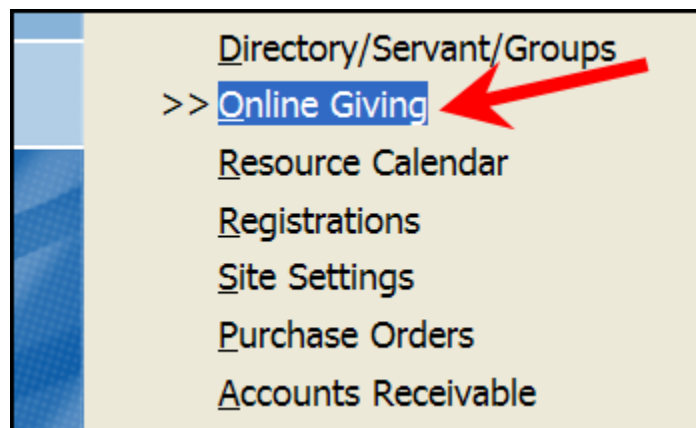
5. Select the **Company** for which you want to export purposes or click **(Show All)** to display all purposes in the grid.

6. Place a check in the **Show on Web** column next to each purpose you want to export to e-Give. You can customize the online description for purposes using the **Web Description** column. In our example, the GENL purpose is renamed "Build our Future".


Purpose Code	Local Description	Show on Web	Web Description
06EMPPLG	Tithe 2006 Pledge (Employee)	☐	Tithe 2006 Pledge (Employee)
06PLEDGE	Tithe 2006 Pledge	☐	Tithe 2006 Pledge
07EMPPLG	Tithe 2007 Pledge (Employee)	☐	Tithe 2007 Pledge (Employee)
07PLEDGE	Tithe 2007 Pledge	☐	Tithe 2007 Pledge
08EMPPLG	Tithe 2008 Pledge (Employee)	☐	Tithe 2008 Pledge (Employee)
08PLEDGE	Tithe 2008 Pledge	☐	Tithe 2008 Pledge
09EMPLGG	Tithe 2009 Pledge (Employee)	☐	Tithe 2009 Pledge (Employee)
09PLEDGE	Tithe 2009 Pledge	☑	Tithe 2009 Pledge
BENV	Benevolence	☐	Benevolence
BUILD	Time to Build	☑	Time to Build
EMERG	Emergency Relief	☐	Emergency Relief
GENL	Offerings-General Non Pledge	☑	Build our Future
LOOSE	Offerings-Loose Cash	☐	Offerings-Loose Cash
MEM	Memorials	☐	Memorials
MGENL	Missions General	☑	Missions General
MHOME	Missions Home	☐	Missions Home
MOVERSEA	Missions Overseas	☐	Missions Overseas
MTGUAT	Mission Trip Guatemala Youth	☐	Mission Trip Guatemala Youth
MTRIPS	Mission Trips	☐	Mission Trips

7. (**Optional**) If you use Commemoratives, click on the **Commemoratives** tab and select the items you want to export to e-Give.
8. Select the appropriate check box to indicate the giving **Frequencies** you want to make available for the exported purposes.

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9. Click the **Save** icon to export your purposes to e-Give.
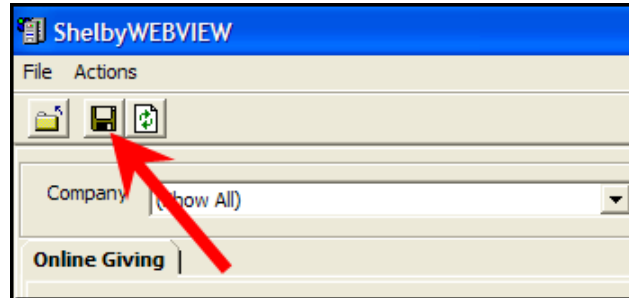
Finalize e-Give Setup

After you have exported your purposes, there are a couple of tasks to complete on the admin side before e-Give is ready to use. First, make sure that you have received the email from your payment processor (ShelbyNext | Giving) notifying you that you are set up. Then, follow these steps to configure your e-Give settings in e-Solutions:

1. Launch your web browser (e.g., Internet Explorer or Firefox).
2. Log into e-Solutions using your admin ID number (or email address) and password.
3. Click on the **Site Settings** tab.
4. Locate the **Online Giving Settings** area on the left side.

5. Remove the check from **Use Test Mode** if you are ready to start accepting online gifts.
   Note: This affects e-Registrations and e-Bill as well, so make sure you are completely ready to go before performing this step.
6. In the **Welcome Message** field, enter a message that displays on the **Online Giving** tab of e-Solutions.

7. In the **Security Message** field, enter a message that displays when your users click the security link. This message should contain details on how you are protecting your users' information.
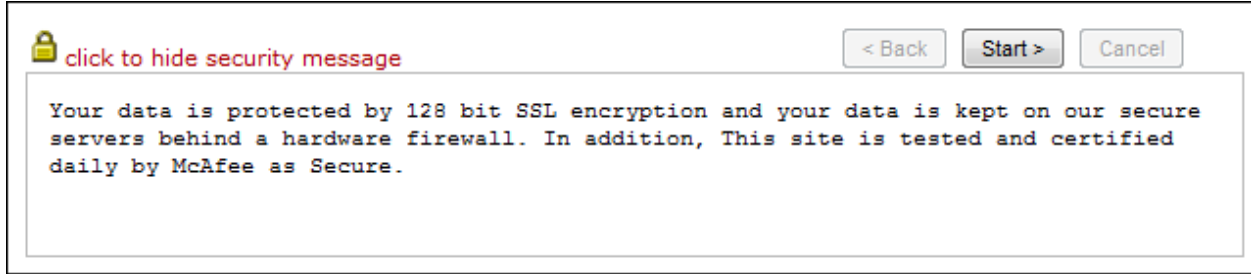
8. In the **Statement Disclaimer** field, you can customize the message you would like to appear at the bottom of the **Tax Statement**.
9. Click the *Online Giving* link by **Accepts Web Payments** to choose which payment methods you accept. Make sure that you only select the options included in your agreement with ShelbyNext | Giving.
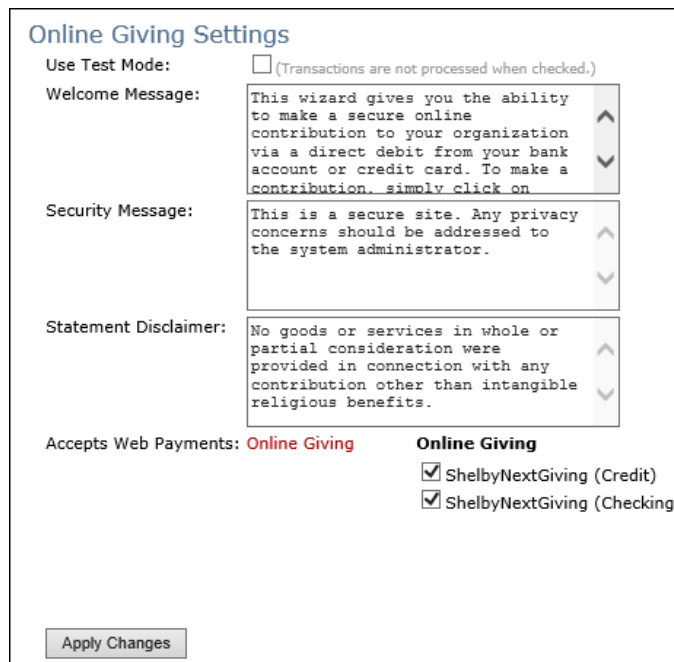
10. Click the **Apply Changes** button.
11. (**Optional**) If you want non-registered individuals to be able to use e-Give, check the **Show Register on Online Giving** check box in the **Site Settings** area. Then click the **Apply Changes** button.

You are now ready to begin accepting gifts via e-Give.

Enter a One-Time Gift

With e-Give, your organization can accept gifts from individuals whether they are registered users of e-Solutions or not. The giving process for registered e-Solutions users and guests is very similar.

Enter a Gift as a Current e-Solutions User

1. Launch your web browser (e.g., Internet Explorer or Firefox).
2. Log into e-Solutions using your ID number (or email address) and password.
3. Click on the **Online Giving** tab.
4. Enter your email address in the verification field if it is not already listed. This ties the email address to the contribution.

Welcome to Online Giving!

This wizard gives you the ability to make a secure online contribution to your organization via a direct debit from your bank account or credit card. To make a contribution, simply click on the "Start" button below, then follow the easy step-by-step instructions. During each step of this process, you will be given the opportunity to cancel. Your contribution will make the difference!!! When accessing the site, make sure to use either your personal email or Shelby ID. If you need help retrieving your credentials click the Forgot My Password link.

Please verify your e-mail address before continuing.

peter.thomas@example.com

🔒 click to view an additional message on security   < Back   Next >   Cancel

5. Click the **Start** button at the bottom of the page.

6. Select your payment type and then click the **Next** button.
   Note: If you have any recurring gifts set up, they display in the **Current recurring payments** area.

7. Complete the information for your gift.
   a. Select **One-Time Gift** from the **Frequency** drop-down list.
   b. Enter the amount next to each purpose to which you want to give.
   c. Enter a memo in the **Memo** field, if desired.
   d. (**Optional**) If you exported Commemoratives, you have the option to select which one you want to associate with your gift.
   e. Click the **Next** button.

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8. Enter the **Account Information** for your gift.
    a. Enter the name and address information for the gift in the **Billing Information** section.
    b. Enter the ACH or Credit Card information in the **ACH Information** (or **Credit Card Information**) section.
    c. Click the **Next** button.

Note: When using a credit card for payment, make sure that the name and address information shown here matches the billing name and address for your credit card account. Making changes for that purpose does not change your name or address in Shelby v.5 or e-Solutions.

Provide Account Information

Billing Information
* First Name: Allen
* Last Name: Adams
* Address: 1743 Forest Glen Dr.
* City: Collierville
* State: TN
* Postal Code: 38017

ACH Information
* Name On Account: Allen Adams
* Account Type: ● Checking   ○ Savings
* Routing Number: 000000000
* Account Number: 999999999

🔒 click to view an additional message on security   < Back   Next >   Cancel

9. On the **Review and Confirm Contribution Information** page, a **Contribution Summary** displays the amounts you are giving to each purpose in addition to the **Billing Information** and **ACH Information** (or Credit Card Information) for the giver. Review the information carefully before continuing.
    a. If you want to review or change any of the information, click the **Back** button.
    b. To cancel the gift completely, click **Cancel**.

10. When you click the **Next** button, your donation is finalized.

11. A confirmation message is displayed after you submit your donation. Click the **Return** button to go back to the start of the online giving wizard.

To see a history of your online giving at any time, log into e-Solutions and click on the **Contribution History** tab. Your gifts display at the bottom of the page in the **Online Transaction History** area.

Online Transaction History

Name	Date/Time	Status	Purpose	Frequency	Amount
Allen Adams	1/7/2016 1:30 PM	PROCESSED	• Budget Giving 2012 ($3.00)	One-Time Gift	$3.00

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The Online Transaction History displays how much you gave to each purpose. If the gift has not yet been imported into Shelby v.5, the **Status** displays "IN PROCESS". Once the gift is imported, the **Status** displays "PROCESSED".

Enter a Gift as a New Registrant

The process of entering gifts for an individual who does not have an e-Solutions account is virtually identical to the process for registered users. If you have enabled registration for online giving, as described in the *Finalize e-Give Setup* section of this document, the Online Giving tab contains an area for new user registration.

New users simply complete the information in the **New User** area, click the **Register** button, and continue through the normal giving process. The e-Solutions admin can choose fields that are required for new user registration on the Site Settings tab. For more information, see the *Using e-Directory* document.

Note: There are special considerations when importing gifts from new registrants. Refer to the *Process Online Giving* section of this document for additional information.

Create an Automatic Recurring Gift

Depending on your settings, contributors can make a recurring payment to your organization for a specified amount over a specified period of time. Automatic recurring gifts can be changed at any time.

Create a Gift

1. Launch your web browser (e.g., Internet Explorer or Firefox).
2. Log into e-Solutions using your ID number (or email address) and password.
3. Click on the **Online Giving** tab.
4. Enter your email address in the verification field if it is not already listed. This ties the email address to the contribution.

5. Click the **Start** button at the bottom of the page.

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6. Select your payment type and then click the **Next** button.

   Note: If you have any recurring gifts already set up, they display in **Current recurring payments** area.

7. Complete the information for your gift.

   a. Select the **Frequency** and enter a **Begin Date**.

      i. Select the **Number of Payments** option if you want to give a specific number of gifts. Enter the number of gifts in the next field.

      ii. Select the **Pay Until Further Notice** option if you want the gift to continue indefinitely. The recurring gift does not stop until you log in to e-Give and edit the details.

   b. Enter the amount next to each purpose to which you want to give.

   c. Enter a memo in the **Memo** field, if desired.

   d. Click the **Next** button.

8. Enter the **Account Information** for your gift.
   a. Enter the name and address information for the gift in the **Billing Information** section.
   b. Enter the ACH or Credit Card information in the **ACH Information** (or **Credit Card Information**) section.
   c. Click the **Next** button.

Note: When using a credit card for payment, make sure that the name and address information shown here matches the billing name and address for your credit card account. Making changes for that purpose does not change your name or address in Shelby v.5 or e-Solutions.

9. On the **Review and Confirm Contribution Information** page, the **Contribution Summary** displays the amounts you are giving to each purpose in addition to the **Billing Information** and **ACH Information** (or Credit Card Information) for the giver. Review the information carefully before continuing.
   a. If you want to review or change any of the information, click the **Back** button.
   b. To cancel the recurring gift completely, click the **Cancel** button.

Review and Confirm Contribution Information

Finally, review the summary below to make sure all the information you have entered is correct.

Contribution Summary
Monthly

─── Billing Information ───
First Name: Allen
Last Name: Adams
Address: 1234 Forest Glen Rd.
City: Memphis
State: TN
Postal Code: 38105-4550

─── ACH Information ───
Name On Account: Allen Adams
Account Type: Checking
Routing Number: 000000000
Account Number: 999999999

Purpose(s): Budget Giving 2012: $3.00
Total Amount: $3.00

To review or change the information you entered in a previous step, click the "Back" button.
To cancel the process of making a contribution, click the "Cancel" button.

To continue processing this contribution, click the next button.

🔒 click to view an additional message on security   < Back | Next > | Cancel

10. When you click the **Next** button, your recurring donation is finalized.

11. A confirmation message is displayed after you submit your donation. Click the **Return** button to go back to the start of the online giving wizard.

You have successfully setup a monthly recurring payment!
Your contribution begins on 1/11/2016
with no scheduled ending.

Transaction Number: 160107135929110
Transaction Date: 1/7/2016

Contribution Amount: $3.00
Contribution Purpose: Budget Giving 2012 ($3.00)
Contribution Frequency: Monthly

Return

View and Modify Recurring Gifts

Contributors can log in and view or modify recurring gifts at any time.

1. Launch your web browser (e.g., Internet Explorer or Firefox).
2. Log into e-Solutions using your ID number (or email address) and password.
3. Click on the **Online Giving** tab.
4. Enter your email address in the verification field if it is not already listed. This ties the email address to the contribution.

5. Click the **Start** button at the bottom of the page.
6. Your current recurring gifts display in the **Current recurring payments** area.

7. Click the **edit** button to the left of the recurring gift you want to edit.

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8. On the **Modify Recurring Payment** page, you have several options:
    a. Click the **Edit Payment** button to edit the gift;
    b. Click the **Stop Payments** button to stop all future gifts; or
    c. Click the **Exit Without Making Change** button to return to the main Online Giving page.
       Note: This does not cancel the recurring gift.

The **Payment History** area at the bottom of the page displays the history of this recurring gift.

Note: Recurring gifts that have processed at least once can also be viewed and/or edited on the **Contribution History** tab in e-Solutions.

Using e-Give with Pledges

When a contributor with an active pledge makes a gift toward that purpose via e-Give, the gift is automatically applied toward the pledge when you import the gift. No additional steps are required.


When a couple is set up to pledge/give together, gifts are recorded on the head of household record even if the spouse is the one who processed the gift in e-Give. However, the Memo tab indicates that the gift was given by the spouse.

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Process Online Giving

After someone makes a donation to your organization via e-Give, you need to import this detail into the Contributions application. A message displays in the **My Reminders** area of the Shelby v.5 Dashboard if there are outstanding gifts on e-Give that have not been imported.

Note: You must have rights to e-Solutions (ShelbyWEBVIEW) in order to see the reminder.
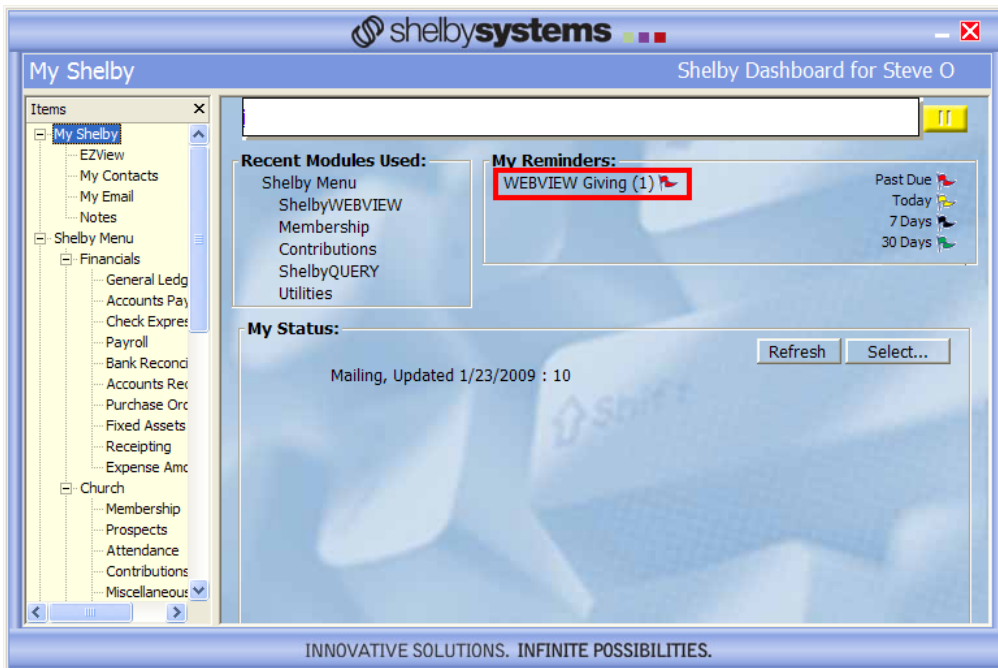
To process online giving:

1. Start Shelby v.5.
2. Click on the *ShelbyWEBVIEW* link, or click on the reminder in the **My Reminders** area on the Dashboard.
3. Log in using your administrator **Login ID** and **Password**.
4. Select **Process Online Giving** from the **Actions** menu.
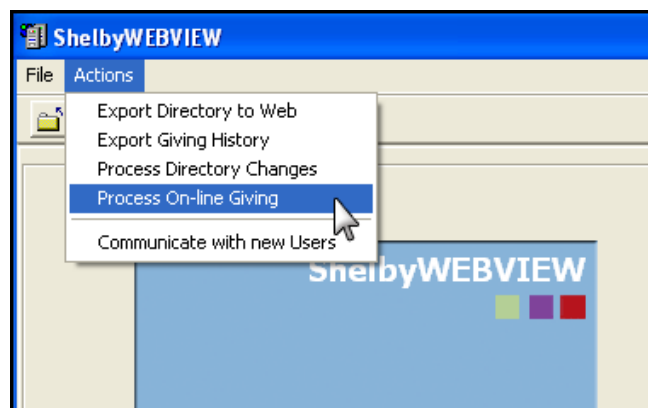
5. If you have enabled registration for online giving, you need to review each new registrant before continuing. In the **Review ShelbyWEBVIEW New Registrants** dialog box, select a **Module** for each individual.

   Note: Selecting the Module for new registrants is an important step. **Make sure that you assign new registrants to a module that you are exporting to e-Solutions.** If you don't, they will not be able to log back in after you sync and will not be able to view their giving history. This will most likely result in a phone call or a duplicate registration. The safest solution is to assign all new registrants to Membership unless you are also exporting Prospects to e-Solutions.

6. When you have imported all new registrants, click the **Finished** button at the top of the window and then click **Yes** to import the changes.
7. When the **Select date range for giving import** window appears, you can choose what date and time frame you want to import. You can also specify which payment methods you wish to import as well as the batch date that you want the imported gifts to have once imported into Contributions. Once you have filled out the fields, click **OK**.

8. Click the **OK** button on the confirmation message. The imported e-Give contributions are now in a batch in **Contribution Processing** in the Contributions application. When looking at the imported gifts in Contributions, the individual gift dates are the date those gifts were given online. Batches imported from e-Give must be processed (and then the giving history exported to e-Give) before the donation will display on the Contribution History tab in e-Solutions. See the *Export Contribution History to e-Give* section of the document for more information.

9. Click **Yes** to print a list of the imported gifts, or click **No** to bypass printing.

Duplicate Registrants

Occasionally, individuals register multiple times for e-Give. When you import online giving, new registrants are compared to existing names in GlobaFILE. If there is a possible match, a prompt displays at the bottom of the window. If you determine that this is a duplicate registrant, select the **Use Match** radio button. The GlobaFILE information for the matching record will then display in the **v5** column in the grid. Compare the information in the two columns. If the v.5 information is correct, leave the **Update** column blank. If new information was provided when the individual re-registered, click in the **Update** column next to that item. This updates the GlobaFILE record for that individual with the information in the **WEBVIEW** column. In our example below, the individual provided a new address. We are leaving her name as it appears in GlobaFILE (v5 column) and updating her GlobaFILE record with the new address information.

Note: Each field in the **WEBVIEW** column is editable. If you notice an error, you can correct it before accepting the changes.

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Export Contribution History to e-Give

You can export historical contribution data from Shelby v.5 to e-Give at any time. When you export giving history, all Contributions data is included, not just gifts made via e-Give. This enables your contributors to view and print giving statements online. You can export as often as you like. It is a good idea to export at least once a week if you have weekly giving either online or offline that you input/import into the Contributions application.

1. Start Shelby v.5.
2. Click on the ***ShelbyWEBVIEW*** link.
3. Log in using your administrator **Login ID** and **Password**.
4. Select **Export Giving History** from the **Actions** menu.
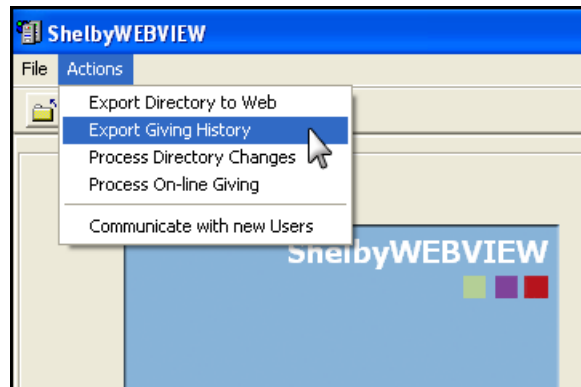
5. Choose the **Company** from the drop-down list.

6. The first time you export, the **Include only records that have changed** check box is not selected. To save time on future exports, you can select this check box so that only individuals who have new contribution detail are exported.
7. Use the **# of Years** drop-down list to select the number of years to export. You can export detail for up to two previous years.

8. Select the **Include Non Tax Deductible Giving** and/or **Include Non-Cash Giving** check boxes if you want to export this information.
9. The **Last Export** field displays the last time that giving history was exported.
10. Click the **Send** button to upload the contribution detail to e-Give.

Viewing Contribution History Online

Once you have exported giving history, you can view it online. Log in to your e-Solutions account and click on the **Contribution History** tab. If you wish, you can rename this tab within **Site Settings** while logged in as an administrator.

In the **Contribution History** area, select which year to display from the drop-down list. Enter a date range in the **Tax Statement** fields and click the **View** button to display a giving statement.

Contribution History

Select Year: 2015 ▼   ☐ Show Online Transaction History

Tax Statement: 1/1/2015 📅 To 12/31/2015 📅 View

1/8/2016

First Church
512 Germantown Court
Memphis, TN 38018

Peter Thomas
7985 Forest Glen Dr.
Collierville, TN 38017

Date of Gift	Purpose	Tax Ded?	Non-Cash?	Amount
11/1/2015	Budget Giving 2016	Yes	No	$500.00
11/8/2015	Budget Giving 2016	Yes	No	$500.00
11/15/2015	Budget Giving 2016	Yes	No	$600.00
11/22/2015	Budget Giving 2016	Yes	No	$500.00
11/29/2015	Budget Giving 2016	Yes	No	$600.00

Purpose	Amount
Budget Giving 2016	$2,700.00

Total # of Gifts: 5
Total Amount: $2,700.00

*** No goods or services in whole or partial consideration were provided in connection with any contribution other than intangible religious benefits. ***

Below the **Contribution History** area a graph displays your giving for the selected year. Below the graph an itemized detail list displays all your exported giving (both online and offline).

| Name	Gift Date	Check #	Purpose	Tax Deductible?	Amount
Peter Thomas	11/29/2015	528	Budget Giving 2016	Yes	$600.00
Peter Thomas	11/22/2015	527	Budget Giving 2016	Yes	$500.00
Peter Thomas	11/15/2015	526	Budget Giving 2016	Yes	$600.00
Peter Thomas	11/8/2015	525	Budget Giving 2016	Yes	$500.00
Peter Thomas	11/1/2015	524	Budget Giving 2016	Yes	$500.00

The **Online Transaction History** area at the bottom of the page displays the gifts that you have given online if the **Show Online Transaction History** option is selected. All attempted transactions are shown, both successful and unsuccessful.

Online Transaction History

Name	Date/Time	Status	Purpose	Frequency	Amount
Peter Thomas	1/8/2016 10:40 AM	PROCESSED	• Budget Giving 2016 ($3.00)	One-Time Gift	$3.00

Payment Search for Admins

The e-Solutions admin can search for payment history on the **Site Settings** tab. Follow these steps to run a **Payment Search Report**:

1. Launch your web browser (e.g., Internet Explorer or Firefox).
2. Log into e-Solutions using your admin ID number (or email address) and password.
3. Click on the **Site Settings** tab.
4. In the **Payment Search** area on the right side of the page, click the *Online Giving* link.

Payment Search
Select Report Type: Accounts Receivable
Online Giving
Registrations
Payments Missed
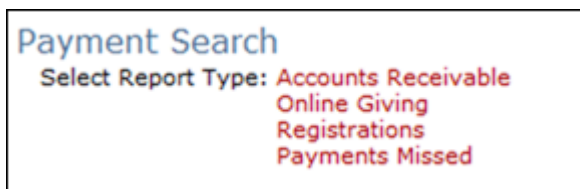
5. The **Payment Search Report** page has an **Online Giving Report** section and a **Recurring Payments Report** section. Click the "X" by a recurring payment to cancel that recurring gift. This updates the payment processor (ShelbyNext | Giving) automatically.

6. Enter a date range in the **Date Range Search** fields to narrow down the report. Click the **View** button to display updated results. The search fields apply to only the Online Giving Report section. The **Export** button allows you to download a CSV file containing gifts from the specified date range.

7. The **Confirmation #** column contains transaction numbers that you can click to see more information such as the Payment Type and Status (e.g., Approved) of the gift.

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