

How-to's for our new Peace Church giving portal



Why are we changing to a new giving portal?

The quick answer?

- Peace will pay **lower processing fees**, and therefore be able to keep more of each donation
- We'll pay **less per year to keep the system running** than we do for our old systems
- It's more **up-to-date and secure**
- It will **reduce financial/bookkeeping volunteer hours** significantly!

How could we say no to all of that?

Want to read all the boring details? Go to PeaceChurchKC.org and select "Give"

Cool Beans! I'm IN! What do I need to do to donate through the new portal?

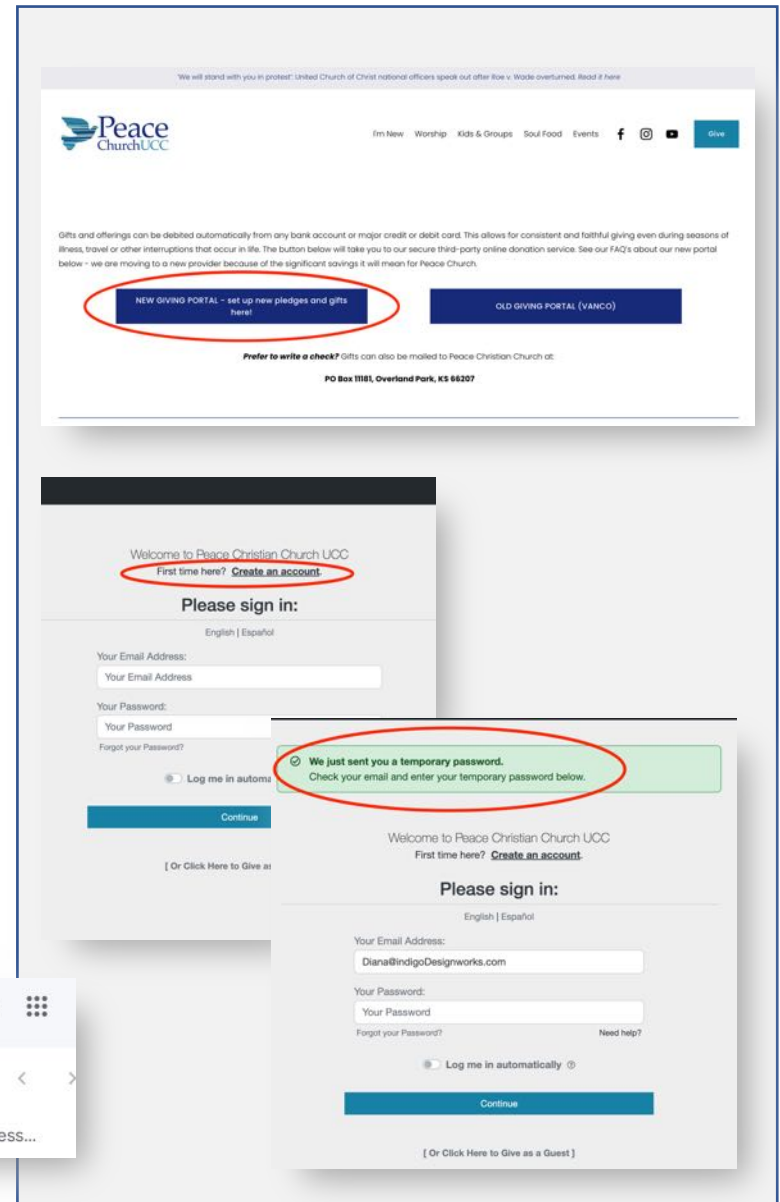
- Turn the page and follow these step-by-step instructions! The whole process should take you 15 min or so to open your new account and close your old account. Have your credit card or bank routing info handy.

I get it - but really don't want to deal with this right now!

- No problem - we're keeping the old portal up and running as well for some time. Everything will continue to run as you currently have it set up!

Step 1 - Set up your new online giving account (through Stripe):

1. Go to PeaceChurchKC.org and select "Give" in the top right corner
2. On the "Give" page, select the "New Giving Portal" button; This will take you a secure window operated Stripe, our new payment processor. All systems are PCI compliant (highest level security, and all transactions take place within their website, not ours.)
3. You'll be taken to a sign-in window. Click the link near the top for **"Create an Account"**. You'll go to a screen where you will submit your email address. **They'll use your email for your account needs only (passwords/receipts).**
4. After you submit your email address, you'll get a **green message bar directing you to your email** to get your temporary password.
5. It will look like this in your email inbox:



Set up your new online giving account - (2)

6 - Use the **temporary password in that email** to sign in. That will take you to a window to set up a new permanent password to use for this system going forward

7 - You'll get this little success pop-up when that is done!

8. You'll now be at the screen to set up your gift. **If this is to be recurring, enter the dollar amount you'd like each separate donation to be.** For example - if you want to give \$2,400 a year with a \$200 per month automatic donation, put \$200 in this spot.

9. Select the arrow next to "General Offering" for a drop down menu listing **ways your gift should be used by Peace**. If this is how you want to make your pledge payments, select **"2024 pledged giving"**.

The image displays three screenshots from the online giving portal. The top screenshot shows a password change form with a 'Submit' button. The middle screenshot shows a 'Success!' pop-up message stating 'Your password has been changed.' with an 'OK' button. The bottom screenshot shows the 'Online Giving' page for Peace Church UCC, featuring a thank-you message and a form to set up a gift. The form includes a 'I want to Give:' section with a dropdown menu for 'General Offering' and a 'Give Once' button. The 'Give Once' button is highlighted with a red circle, and the dropdown menu is also highlighted with a red circle, showing options for '2024 Pledged Giving' and '2023 Pledged Giving'.

Set up your new online giving account - (3)

10 - To make an additional monthly donation

- to Monthly Mission for example - **select the small plus sign in the circle** next to this.

11 - **"Add Another"** will appear with a plus sign - click on that

12 - A second line will appear for you to enter your additional monthly amount and **second category of giving.**

The system will show the total amount of your gift, including all categories of giving that you have selected, and will say "Multiple categories" after the dollar total.

The image displays a sequence of four screenshots from the Peace Church UCC online giving portal, illustrating the process of adding a second donation category to a monthly pledge.

- Top Screenshot:** Shows the "Add New Entry" form. The first entry is "2024 Pledged Giving" for "50.00 USD". A red circle highlights the "+ Add another" button next to the category dropdown.
- Second Screenshot:** Shows the dropdown menu for the second entry. The "General Offering" option is selected and circled in red.
- Third Screenshot:** Shows the "Add New Entry" form with two entries: "2024 Pledged Giving" (50.00 USD) and "General Offering" (0.00 USD). The total amount is updated to "Total: 50.00 USD" (Note: the text in the image says 50.00 USD, but the final screenshot shows 75.00 USD, suggesting the 0.00 USD entry was actually 25.00 USD). A red circle highlights the total amount.
- Bottom Screenshot:** Shows the final "Add New Entry" form with the total amount updated to "75.00 USD (Multiple Entries)". A red circle highlights the total amount. The "Give Once" button is visible, along with the "Choose a Payment Source:" field.

Set up your new online giving account - (4)

8. Indicate if this is a one-time gift or a recurring gift. **If recurring, enter the dollar amount you'd like each separate donation to be.** For example - if you want to give \$2,400 a year with a \$200 per month automatic donation, put \$200 in this spot.

10 - **For a repeating gift like a pledge**, select the little arrow next to "repeat" in the teal bar, and you'll get a list of **Weekly, Biweekly or Monthly**.

- You can come back to this screen anytime to "Give Once", for things like Christmas Eve or One Great Hour of Sharing offerings, or to update your pledge amount.

11. **Click on the small calendar icon** next to the frequency (monthly biweekly or weekly) that you have just selected to bring up a calendar. **Select the date/days of the month** you would like your donation to be made.

NOTE - you can NOT select a date/day more than two weeks later than the day you are setting this up.

Online Giving

Peace Church UCC

Thank you so much for the generosity of your gift to Peace Church. Working for justice and caring for others through service is an integral part of how we worship God, and we are honored to have you support us in that effort.

I want to Give:

0.00 USD General Offering

Give Once Repeat

Choose a Payment Source

Enter a New Payment Source

Help cover the card processor

Weekly

Biweekly

Monthly

I want to Give:

0.00 USD 2023 Pledged Giving

Give Once Monthly

Schedule this gift to charge/start on:

October 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Choose a Payment Source:

Enter a New Payment Source

Schedule this gift to start on a future date

Set up your new online giving account - (5)

12 -With the date selected, choose **"Enter a new Payment Source"** below the calendar.

If you plan to pay by credit card and would like to donate an additional amount to **cover credit card processing fees**, click on that toggle.

13 - **Select either Card or US Bank account** at the top of this window - and the page will change to allow you to put in info for either one kind of payment or the other.

Note - does it matter which way I choose to give?

We're grateful for your donation, no matter what way you choose to give! Some have asked if there is a financial benefit for Peace Church in one way of giving over another. Peace will **pay lower transaction fees if you give by ACH/US Bank Account** - but credit card giving is great with us if you prefer it!

Fees Peace Church pays :

- **Credit Card donations** are 2.5% of the amount + .25 for each transaction (so if you give \$100, Peace Church receives \$97.30)
- **ACH/Bank Drafts** are just .25 for each transaction (So if you give \$100, Peace Church Receives \$99.75)

The screenshot displays the online giving interface for Peace Church UCC. At the top, a calendar for November 2023 is shown with the 7th selected. Below the calendar, a 'Choose a Payment Source:' section is visible, with a button labeled 'Enter a New Payment Source'. The main content area is titled 'Online Giving' and features the Peace Church UCC logo. Two payment options are presented: 'Card' (selected) and 'US bank account'. The 'Card' option is circled in red. Below the selection, there are input fields for 'Card number' (1234 1234 1234 1234), 'Expiration' (MM / YY), 'CVC' (CVC), 'Country' (United States), and 'ZIP' (12345). A blue button at the bottom is labeled 'Charge 100.00 USD'. A disclaimer at the bottom states: 'By providing your card information, you allow PEACE CHRISTIAN CHURCH, INC to charge your card for future payments in accordance with their terms.'

Set up your new online giving account - (6)

14 - To enter your bank account number, select the button on the top right and then either **search for your bank, or select the line of text** near the bottom of the window to bring up a pop-up to enter your routing and account number. Enter your bank account details and click "Continue"

Online Giving

Peace Church UCC

Card **US bank account**

Email

Full name

Bank account

Q Search for your bank

Bank of America PNC WELLS FARGO

CHASE USAA NAVY FEDERAL Credit Union

Enter bank details manually instead (takes 1-2 business days)

Charge 100.00 USD

stripe

Enter bank account details

Your bank information will be verified with micro-deposits to your account.

123456789 123456789 1234

Routing number

123456789

Account number

000123456789

Please enter a checking account.

Confirm account number

000123456789

Continue

Charge 100.00 USD

Set up your new online giving account - (7)

15 - **Click the button at the bottom to complete the transaction.**

16 - You'll get a **success pop-up** window when you are done - and a **confirmation email** from "ereceipt" will be in your email inbox!

Thank you for your gift!!!

If you are currently giving to Peace through automatic payments, there is one more critical step - you must sign in to our old portal to discontinue THOSE withdrawals - or both systems will charge you! Those instructions follow! (It's fast and easy!)

The image shows a two-part screenshot of the Peace Church UCC online giving interface. The top part is the payment form, titled "Online Giving" and "Peace Church UCC". It offers two payment methods: "Card" (highlighted with a blue box) and "US bank account". The card form includes fields for "Card number" (1234 1234 1234 1234), "Expiration" (MM / YY), "CVC", "Country" (United States), and "ZIP" (12345). Payment logos for VISA, Mastercard, American Express, and JCB are shown. A blue button labeled "Charge 100.00 USD" is circled in red. Below the form is a confirmation message: "Thank you for your gift! The charge of 25.00 USD was successful." with a "Return to Online Giving" button. The bottom part of the screenshot shows a browser's address bar with a search for "ereceipt" and a search result for "Thank You For Your Online Donation - Thank you for your donation! Details ...", which is also circled in red.

Step 2 - Turn off your old giving account (through Vanco)

1 - **Go back to the PeaceChurchKC.org website**, and select "Give" in the upper right corner. Select the button labeled **"Old Giving Portal (Vanco)"**

2 - This will take you to a secure window on Vanco. Go to the panel on the **right side of the page to log in** to this account to access the information you have on file for your current automatic giving. (This is your old account password - not the one you just set up in the New Portal. If you do not remember this old password, there is a blue link just under the "Log In" button. Changing this password will not impact the new one you just set up in the New Portal - these are two different payment processors and systems)

The top screenshot shows the Peace Church website header with the 'Give' button in the top right. Below the header, there is a message about automatic debits and a link to the 'NEW GIVING PORTAL'. The 'OLD GIVING PORTAL (VANCO)' button is circled in red. Below this, there is a note about writing a check and the church's address: PO Box 1181, Overland Park, KS 66207.

The bottom screenshot shows the 'Online Donation' page. The 'Log In' button is circled in red. The page includes fields for 'Email Address' (Diana.Larson.Stuart), 'Password', and a 'Log In' button. There is also a 'Create Your Online Profile' button and a 'Continue' button at the bottom.

Turn off your old giving account (through Vanco) - (2)

3 - Your current recurring transaction request is listed under **"My Scheduled Transactions"**.

- At the end of each scheduled transaction is an option to **"edit/delete"**. Select **"delete"**

4 - A small pop-up window will appear asking you to **confirm this - select "Yes"**

The first screenshot shows the 'Online Donation' page for Peace Church. Under the 'My Scheduled Transactions' section, there is a table with the following data:

Date	Fund	Amount	Total	Account #	Frequency	Action
11/16/23	General Operating	10.00	10.00	6506	Monthly	Edit Delete

The 'Action' column for the first row is circled in red. Below the table is the 'My Transaction History' section with search filters for Date Range (09/25/23 to 10/27/23) and Fund (All Funds).

The second screenshot shows a confirmation pop-up window with the text: 'www.eservicepayments.com says Are you sure you want to delete this Donation?'. The 'OK' button is circled in red. Below the pop-up is the 'Donations' form with fields for General Operating (\$10.00), Monthly Mission Project (\$0.00), and a Total of \$10.00. The Donation Frequency is set to Monthly. At the bottom, there are 'Back', 'Delete', and 'Continue' buttons.

Turn off your old giving account (through Vanco) - (3)

5 - Red text will appear under the "Scheduled transactions" section, saying that it has been **successfully deleted**. It should also say you have no upcoming transactions - if not - repeat this process for each scheduled transaction.

6 - You should have an email from "cs" that is a **"Deleted Transaction Confirmation"**

It's all DONE!!!
Thank you for your gift to Peace!

