

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?

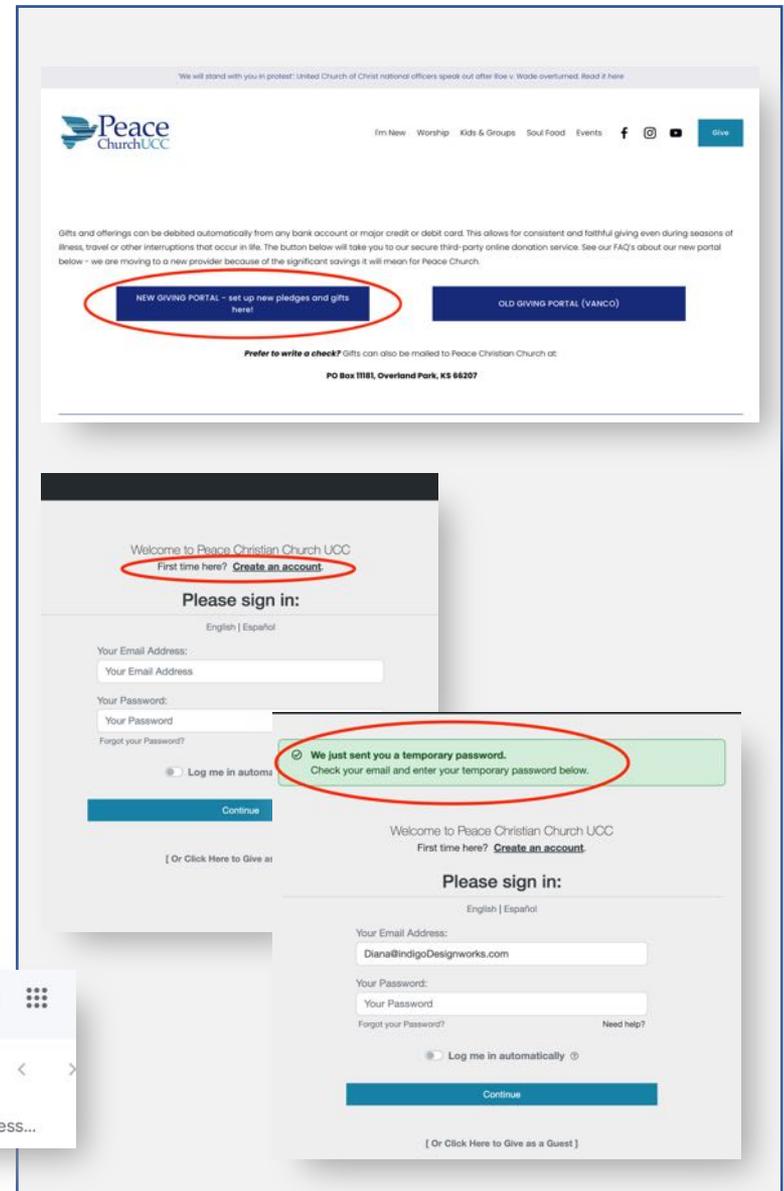
- Turn the page and follow these step-by-step instructions! The whole process should take you 15 min or so to open your new account and close your old account. Have your credit card or bank routing info handy.

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. In the gift setup form, the 'I want to Give:' field is set to '0.00 USD' and the 'General Offering' dropdown menu is open, showing options for '2024 Pledged Giving' and '2023 Pledged Giving', both of which are circled in red.

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 screenshots illustrate the following steps:

- Initial selection: Amount 50.00 USD, Category 2024 Pledged Giving. A small plus sign is circled in red.
- Clicking '+ Add another' to open a second entry field.
- Adding a second entry: Amount 0.00 USD, Category General Offering. The total is updated to 50.00 USD. The 'General Offering' category is highlighted.
- Final result: Amount 75.00 USD (Multiple Entries). The 'Repeat' button is visible.

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

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)

November 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	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	1	2
3	4	5	6	7	8	9

Choose a Payment Source:

Enter a New Payment Source

Online Giving

Peace Church UCC

Card US bank account

Card number

1234 1234 1234 1234

Expiration MM / YY

CVC CVC

Country United States

ZIP 12345

By providing your card information, you allow PEACE CHRISTIAN CHURCH, INC to charge your card for future payments in accordance with their terms.

Charge 100.00 USD

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"

NOTE - the system will ask you to log in to your bank account if selecting an ACH transaction. Stripe is NOT keeping/storing your password - just assuring that you own the account and are authorizing the automatic draft by having you log into your account.

Feel free to change your banking password after you complete set-up if you will feel better about that, it will not affect your automatic giving.

The screenshot shows the 'Online Giving' interface for Peace Church UCC. The 'Card' section has a 'US bank account' button circled in red. Below the 'Bank account' section, there is a search bar and a grid of bank logos: Bank of America, PNC, WELLS FARGO, CHASE, USAA, and NAVY FEDERAL Credit Union. Below the grid, the text 'Enter bank details manually instead (takes 1-2 business days)' is circled in red. A Stripe pop-up window is overlaid on the bottom right, titled 'Enter bank account details'. It contains the following fields: 'Routing number' (123456789), 'Account number' (000123456789), and 'Confirm account number' (000123456789). A 'Continue' button is at the bottom of the pop-up.

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!!!

(Want to check or edit your recurring gift? Click the little cogwheel icon next to "Choose a payment Source")

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!)

Online Giving

Peace Church UCC

Card US bank account

Card number
1234 1234 1234 1234

Expiration MM / YY CVC CVC

Country United States ZIP 12345

By providing your card information, you allow PEACE CHRISTIAN CHURCH, INC to charge your card for future payments in accordance with their terms.

Charge 100.00 USD

The charge of 25.00 USD was successful.

Return to Online Giving

Deleted transaction confirmation - Deleted Transaction Confirmation Your Donation to...

ereceipt Thank You For Your Online Donation - Thank you for your donation! Details...

I want to Give:
0.00 USD General Offering

Give Once Repeat

Choose a Payment Source: Enter a New Payment Source

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's 'Give' page. The 'Old Giving Portal (Vanco)' button is circled in red. The bottom screenshot shows the 'Online Donation' page with the 'Log In' button circled in red.

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 top 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 bottom screenshot shows a confirmation pop-up window with the text: 'www.eservicepayments.com says Are you sure you want to delete this Donation?' and buttons for 'Cancel' and 'OK'.

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!

