

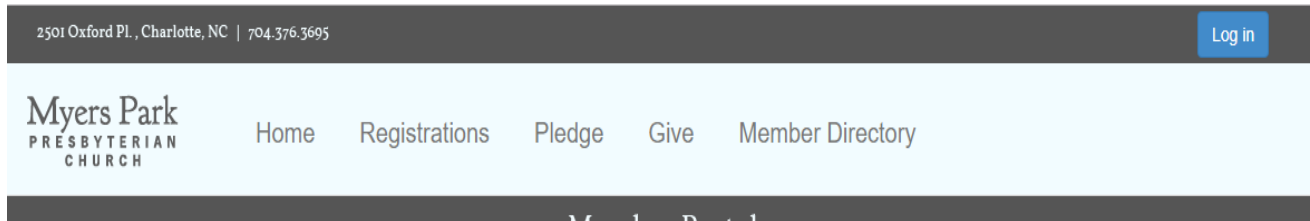
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**If you need further assistance, please contact Rachel Gibson at:
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Phone: #704-927-1263

I. Setting up a *new* online scheduled giving

Step 1: Log in (red arrow)

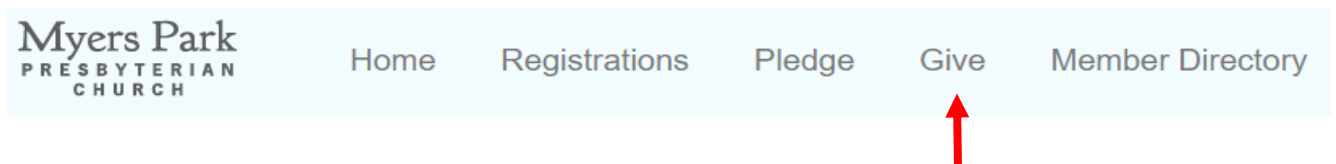


Step 2: Enter your username and password, press the blue login button

Member Portal Account

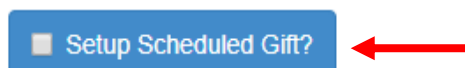
The image shows a login form titled "Member Portal Account". It contains two input fields: "Username" and "Password". Below these fields is a blue "Login" button, which is pointed to by a red arrow. Underneath the "Login" button is a checkbox labeled "Remember Password".

Step 3: Click on **Give**



Step 4: Ensure all of your **contact information** is correct.

Step 5: Click on **Setup Scheduled Gift?** (blue box midway down the page)



Step 6:

Fill out the information in the grey box: i.e.: Profile name (can be whatever you want), Frequency, Begin Date, Number of payments.

(*We recommend **not** utilizing the “Pay until further notice” option, as all contributions will continue to pay towards the initially selected GF until you stop it, it does not automatically convert to the new GF at the start of the year.)

Scheduled Gift
Please enter the scheduled giving details below.

Profile Name
My Giving Profile

Frequency
Once a Month ▼

Begin Date (Modify with calendar)
1/8/2019

Number of Payments
12 ←

☒ Pay Until Further Notice

Step 7: Enter the amount you want to give (per your frequency) in the 2019 General Fund.

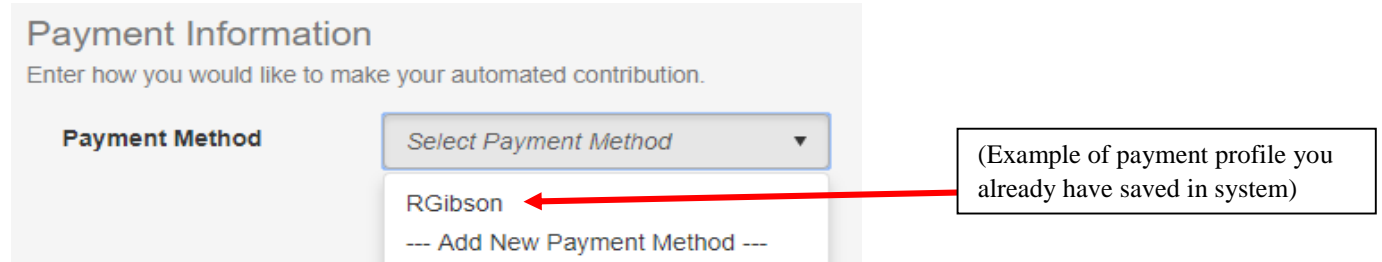
For example: \$100 (with a **frequency** of once a month, for 12 **number of payments**) would then be a **Scheduled Giving Total** of \$1,200.00

Giving Amount
Enter the amount that you'd like to give.

2019 General Fund	\$ 100.00 ←
2018 General Fund	\$
2017 General Fund	\$
Endowment Fund	\$
Payment Total	\$ 100.00
Scheduled Giving Total	\$ 1,200.00 ←

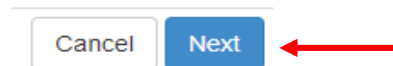
Step 8: Select the payment method you would like to use.

Note:* You will be able to select a payment profile you have already saved. If you want/need to schedule a new payment method, select: **---Add New Payment Method --- (**If you need to Add a New Payment Method, skip to **Step 11** below*).




The screenshot shows a form titled "Payment Information" with the subtitle "Enter how you would like to make your automated contribution." Below this, there is a section labeled "Payment Method". To the right of this label is a dropdown menu. The dropdown menu is open, showing the text "Select Payment Method" at the top, followed by "RGibson" (which is highlighted with a red arrow pointing to it from a text box on the right), and then "--- Add New Payment Method ---". The text box on the right contains the text "(Example of payment profile you already have saved in system)".

Step 9: **If you are using a payment profile you already have saved in the system, click on the payment profile you wish to use and click **Next**.*

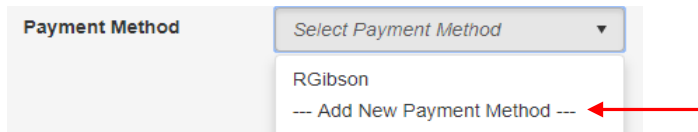


The screenshot shows two buttons at the bottom of the form: "Cancel" and "Next". A red arrow points to the "Next" button.

Step 10: After clicking next you will be taken to a confirmation page. Verify all of the information is correct. If it is, click Finish . You should then get a Confirmation Number. **CONGRATS**, you are all done!

I. Adding a new payment method

Step 11: Click on the ---Add New Payment Method---




A. Click on either Debit/Credit Card or Bank Account (whichever you want to set up)



B. Fill out all the requested information. If you would like to store the payment profile for future use, click the blue box to do so.



C. Pick a nickname for your payment method and enter that in the Payment Method Nickname (can be whatever you would like, this is how it will be listed under your Payment Method).

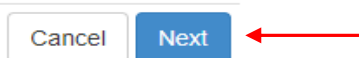


Example of Payment Method Nickname

Step 12: Click Save



Step 13: Click Next

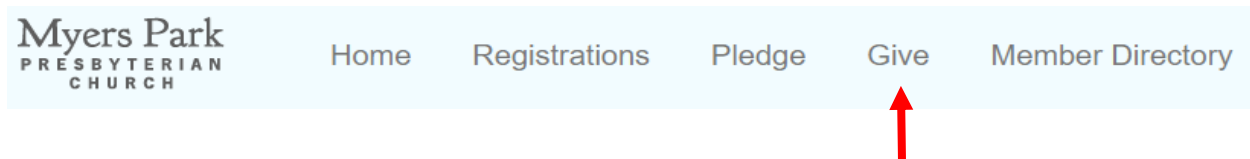


Step 14: After clicking next you will be taken to a confirmation page. Verify all of the information is correct. If it is, click Finish. You should then get a Confirmation Number. **CONGRATS**, you are all done!

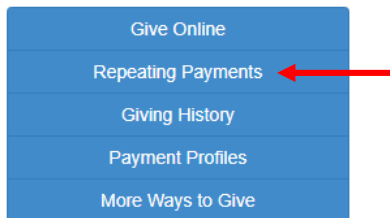
Finish

II. Deleting an old scheduled giving (i.e. repeating payment)

Step 1: Click on **Give**

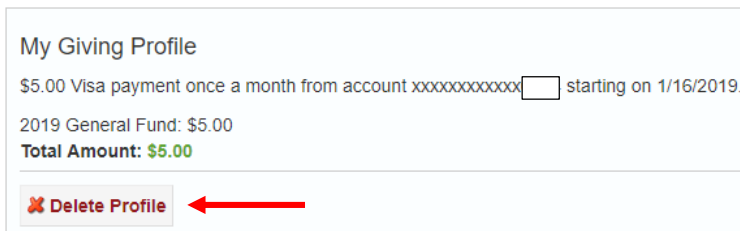


Step 2: Click on **Repeating Payments**

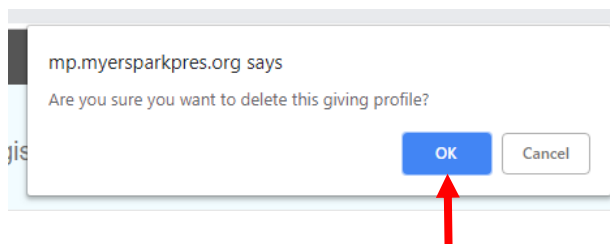


Step 3: Click on **Delete Profile** (for whichever one you wish to delete)

Repeating Payments



A. A pop-up will appear that asks “Are you sure you want to delete this giving profile?”
If yes, click **OK**.



You are finished!!