Online Giving and Directory Instructions

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Using the Directory Tab

You can view selected records in our database from the **Directory** tab.

1. Click the **Directory** tab to display the Directory page.
2. There are two ways to choose the records that display on this screen.
3. **Last Name:** - Click one of the alphabetical letters to display all records where the last name begins with the letter chosen or:
4. Choose a criteria field from the drop down list and then:
5. Type any alphanumeric characters into the Search box and click the button. The records meeting your criteria will display.
   Tips: From this screen, you may click on any address to open a new window that will access a mapping program on the Internet. Click on any email addresses from this screen to open your e-mail program and automatically have the e-mail address appear in the **To:** box.
6. If the members name is highlighted in red then you may view the **Member Details:**
   - **Title:**
   - **First and Middle Names:**
   - **Last Name:**
   - **Suffix:**
   - **Salutation:**
   - **Birth date:**
   - **Employer:**
   - **Position:**
   - **Occupation:**
   - **Address 1:**
   - **Address 2:**
   - **City:**
   - **State:**
   - **Postal Code:**
   - **Home Phone:**
   - **Business Phone:**
   - **E-Mail Address:**
   - **Web Address:**
7. Notice that the other **Family Members** are listed at the bottom of this screen. You may click to go directly to their records.
8. Click **Return to Directory** to return to the Directory page.

Using the Personal Profile Tab

Reminder: you must click the update button every time you make a change on this tab in order to save changes.

You may view (if you are the Head of Household or Spouse) and/or edit your family's records from the Personal Profile tab. (if you are the Head of Household)

1. Click the **Personal Profile** tab to display the **Family Members** page.
2. The members of your family will display on this page (if you are the Head of Household or Spouse) so that you may edit information for anyone in your family (if you are the Head of Household). If you are NOT the Head of House, your personal record will display allowing you to edit if needed.
3. Click to edit selected information on the record chosen.

4. Edit (as needed) the **Member Details:**
   - **Title:**
   - **First and Middle Names:**
   - **Last Name:**
   - **Suffix:**
   - **Salutation:**
   - **Birth Date:**
   - **Employer:**
   - **Position:**
   - **Occupation:**
   - **Address 1:**
   - **Address 2:**
   - **City:**
   - **State:**
   - **Postal Code:**
   - **Home Phone:**
   - **Business Phone:**
   - **Mobile Phone:**
   - **Pager:**
   - **Web Address:**
   - **E-Mail Address: -** (required field)
   - **Additional Comments:**

5. Click the appropriate **Check** boxes **Pertaining to Me:**
   These check boxes only appear on the head of household record.
   Check the boxes that you want to be seen by others for yourself and for your family. Then check the 'inherit my rights' box so that those options will be on each family member. Then go to each family member under personal profile and uncheck any boxes for that person that you don't want seen. For example: you may want you and your spouses email to show, but not yours kids emails. Check the "email" box under you and "inherit my rights" box and then go to each kid and uncheck the email box.

   - **Show Me in the Directory -** By default this option is checked**.** When checked, the four sub-options are automatically turned on. You may remove the check mark from any of the information that you don't want to display.
   - **Allow Detail View Access -** Allows other church members to see your detail information. The information that you are looking at while on the personal profile screen is the information that is available for other members to see (except for your birth year--members can only see the month and day of your birth).
   - **Show Address -** display your address in the FIRSTNET directory.
   - **Show Phone Number -** display your phone number in the FIRSTNET directory.
   - **Show E-mail Address -** display your e-mail address in the FIRSTNET directory.
   - **Show Photo -** display your photo in the FIRSTNET directory. (Photos are not currently available.)
6. Click the appropriate **Check** boxes **Pertaining to My Family:**
   These check boxes only appear on the head of household record.

   "Show my family in the directory" checked means that the names of all the family members will be seen in the directory. So if you want info on you and your spouse to show, but not your kids. Then check this box and then go to each kid's profile and uncheck all the boxes that you don't want to show for them. Their names will still show in the directory, but none of the info you unchecked can be seen. If you don't want any other family members to show in the directory at all, then uncheck this box.

   See number 5 above for "inherit my rights" –This is a shortcut button for the head of household so that he/she can set all the items for all the other family members without having to click on each member one at a time. When you check this box; then whatever you have checked in the "**pertaining to me**" boxes will also show on the other family members. Then you can go to each of them and selectively uncheck any individual items you don't want to show.

- **Show My Family in the Directory -** By default this option is checked. Click the **Check** box to include your family in the directory. (See #6 above)
- **Inherit My Rights -** Click the **Check** box to give everyone in your family the same rights that you have. (See #6 above)
- **Allow WebView (Firstnet) Login?** - This checkbox is located on the other family member's screens next to the ID #. Click the **Check** box to allow this person to log in to FIRSTNET. This option will only be seen by the head of house when he or she is updating other family member's screens. This option is not displayed on the head of house's record.
- Click the **Change Password** link if desired.
  New Password - Type a New Password with between one and twenty characters (letters and/or numbers). The head of house may set up a different password for each member of the family if desired.
  Re-type New Password - Re-type your New Password here for verification.

Using the Personal Profile tab to update your information on the church database.

We would like to encourage all heads of household to take the time to update or correct any information you see for you or your family members personal profile screens and click the update button. This will then correct our database with accurate information. We especially appreciate birthdates as these are used by our staff to filter who should or should not be included on some contact reports. Remember your birth year is never seen by anyone else, but you.

Using the Online Giving Tab

You can make a secure online contribution to our church by providing your checking/savings account and routing number.

1. Click the **Online Giving** tab.
2. You are now on the **Online Giving Wizard** screen.
3. You must type your e-mail address before continuing.
4. Click the **Next** button to begin the easy step-by-step giving instructions.
   You will be given an opportunity to **Cancel** this process if you change your mind about making a contribution. You can click the **Back** button at any time to return to a previous screen and review or make changes.

   If you have any recurring payments set up, you can edit them from this screen by clicking on the pencil Icon to the left of the payment description. Warning: if you get to the bank account info screen and decide not to go any further-do not click the 'cancel' button, use your browser back button—**all the way back to the Online Giving main screen** (or your recurring payment will be deleted).

5. **Choose Payment Type -** click the radio button to choose the payment source for this online gift. (check/savings is the only type available at this time).
6. Click the **Next** button to continue the process.
7. **Provide Amount, Purpose, and Frequency.**
   - **Frequency -** select the frequency (e.g., One-Time Gift, Weekly, Bi-Weekly, Monthly, Quarterly) from the drop down list.

   Weekly - whatever date you choose to start with this option, the following debits will always come out on that day of the week. Example: if you start on March 30th, 2009 (Monday) then the weekly amount will come out on every Monday after that. (52 times a year)

   Bi-Weekly - Same as weekly, but the payments will be debited every other week on that same day of the week. (26 times a year).

   Monthly - Whatever day of the month you choose to start, the payments will come out on that date every month thereafter (or the next banking day). Example: start on

the 4th of a month and each payment will come out on the 4th of every following month. (or the next banking day) (12 times a year)

- **Purposes -** type the amount you want to give next to each purpose listed**.**
  A **Total** amount will display at the bottom of the page.

8. Click the **Next** button to continue the process. Confirm the info and click next again.
9. **Provide Account Information** - locate a blank check from the bank account from which you want to make your contribution. Use the bottom of the check to locate and fill in the following fields.
   - **Routing Number -** routing number for account on bottom of check.
   - **Account Number: -** Savings or Checking Account Number on bottom of check.

   10. Click the **Next** button to continue the process.
   11. Review and Confirm Contribution Information - review the summary information displayed on the screen to check for accuracy before finalizing.
   12. The amount given will be drawn from your bank.

Using the Contribution History Tab

You may view and print your giving/online transaction history from the Contribution History tab. You must be **logged in as the 'head of household'** in order to view all contribution history. Other family members will only see any online giving they have done.

1. Click the **Contribution History tab** to display your giving information.
2. Make sure that you have selected the **correct year** for Giving History from the drop down list in the upper left corner.
3. You can print a **Tax Statement** for transactions by entering the beginning and ending dates. Click the View button to display before printing.
4. **Giving by Purpose** is displayed in a pie chart format.
5. Detail gifts are listed in descending date order.
6. The **Online Transaction History** is listed below the detail gifts.
7. You may use this tab to print a contribution detail list if desired.