ONLINE GIVING SETUP INSTRUCTIONS

Step 1—Complete the Application Process

1. Ensure that the Giving sign-up process has been completed. Sign-up begins at the time of purchase, but there is an application that must be completed. After you place your order, you'll receive an email with login information to the Online Giving Admin Panel (Questions—contact a member of our sales team)

2. Log in and access the application form (click the "Depository Account Information" link). Complete and submit your application, including uploading necessary documentation (i.e. voided check, 501c3 document, etc.)

3. Once the application process is complete an email is sent (subject line—"Congratulations-Welcome to…") stating that "you can now begin receiving donations".

Step 2—Create Online Giving Funds

4. Log in again to your giving control panel.

5. Create funds in the giving control panel (Click Organization in the top right corner, then Fund Management). We recommend that you use the same names as your database funds/categories. You only need to create funds that you want to make available for online giving.

Step 3—Map Online Giving Funds to Database Funds

6. Navigate to the ChMS integration page (Click the Organization drop down menu at the top right, click ChMS Integration).

7. Enter your church sub-domain and click Save Settings.

8. Map giving system funds (created in Step 3) to your database funds (created in the database at Settings > Giving > Giving Categories). Set one fund as default - usually the General Fund.

9. Merge your Forms Management Accounts (this step is necessary if you have been creating forms in both your database and your online giving accounts prior to integration).

10. Enable the integration by clicking on the button on the bottom of the page.