

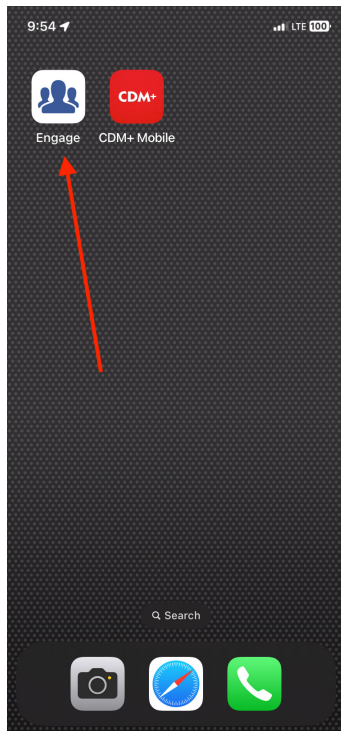
Engage Giving

CDM+ Engage Giving

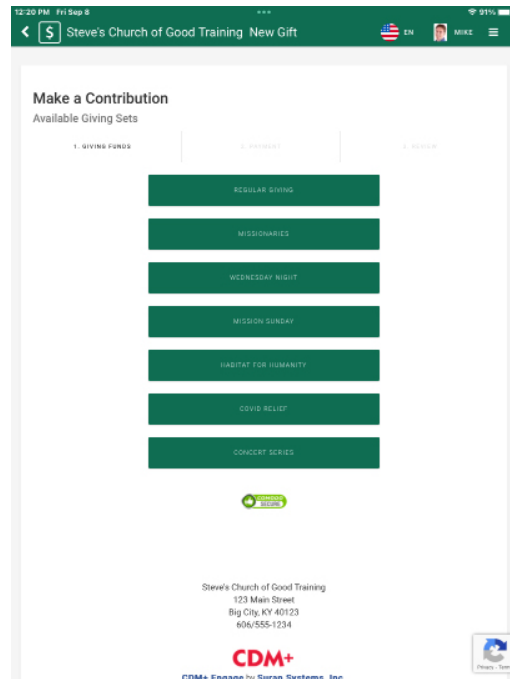
Suran Systems provides online giving through Engage Giving. This class covers the setup, administration, and use of Engage Giving.

Many online giving options are available to today's nonprofit and faith-based organizations, but only CDM+ Engage Giving interacts with your CDM+ database, automatically entering online gifts into CDM+ Contributions and Fund Accounting thereby freeing staff for other ministry-related activities.

With CDM+ Engage Giving, anyone can donate securely and easily to any fund(s) you designate, using a debit or credit card or an ACH withdrawal from a checking or savings account simply by visiting your website or using the smart device "app". A single gift may be split among several funds with the receipt detailing how the gift was allocated.



Engage Giving button on mobile device



Engage Giving link on organization website

CDM+ Engage Giving is not an app; it creates a URL for people to use to make electronic contributions. Mobile devices offer a procedure to "make" this URL appear as an app button on the mobile device. Engage Giving offers the same experience – a clean display, smooth operation, and the ability to make a donation in less than 30 seconds – from a smart phone, a tablet, or a browser.

Engage Giving gives members or visitors the ability to create an account or log into their existing account, make a one-time immediate gift, set up a recurring gift schedule, maintain their payment sources, review any existing recurring setups, to view a gift history, print a giving statement all from their web access point of choice – smartphone, tablet or browser. Engage Giving integrates seamlessly with a member's Engage account, if the church/organization offers Engage Member.

Setting Up Engage Giving

Log into CDM+ as an administrator. Go to **Program ► CDM+ Engage ► Settings**

Engage Giving Options

The screenshot shows the 'Engage Giving Options' settings page. On the left is a navigation menu with items: Organization, Member Changes, Groups, Giving (highlighted), Giving Sets, Text Giving, One Time Charge, and Billing. The main content area is titled 'URL' and contains the instruction: 'Access the main giving section of your CDM+ Engage site at this address.' Below this is a text input field containing the URL 'engage.suran.com/srh/s/give/new-gift'. Underneath the URL field are three buttons: 'Copy', 'Embed HTML', and 'QR Code'. Below the URL section is a 'Memo' section with the instruction: 'This will appear in the email receipt sent to givers.' It features a rich text editor with a toolbar containing icons for bold, italic, underline, bulleted list, numbered list, and link. The memo text reads: 'I want to say thank you for your donation to The Church of Good Training. We're honored you would bless us with your generosity. Donations like yours make a big difference in the work our church is doing in the community and around the world. Without givers like you, our church would not have the impact or influence it does. Because we're a tax-exempt nonprofit, you also get to write this donation off on your taxes. At the end of the year, we'll send you an annual recap with how much you've given to the church. The Church of Good Training. Sincerely, Pastor Dean Patterson, Lead Pastor Per IRS regulations, we state that the only benefit received by the donor is an intangible religious one.' Below the memo is a 'Card Payments' section with the instruction: 'Select the payment type that should be used for credit card contribution records in CDM+.' It has a dropdown menu currently set to 'Credit Card'. Finally, there is an 'ACH Payments' section with the instruction: 'Select the payment type that should be used for ACH contribution records in CDM+.' It has a dropdown menu currently set to 'ACH'.

URL - The Giving URL is an extension of the Engage URL created as part of setting up Engage. This address can be used as the link for a **Donate Now** button on your web site. It can also be converted to a **QR code** that someone can scan from a flyer, bulletin, or pew card. Use the following buttons:

- **Copy** to copy the URL to your clipboard
- **Embed HTML** to put on your website
- **QR Code** to download a QR code that will access your giving page

Memo - This message will be included in the email acknowledgement to the giver. This could be a thank you note, or include text to indicate that the gift is tax deductible.

Card Payments and ACH Payments – select from available Payment Types. These are created in CDM+ Desktop Master Coding System. We suggest different payment types for Engage gifts and also separate types for card versus ACH gifts.

The screenshot shows a settings page with three main sections:

- Staff Notifications:** A header "Staff Notifications" followed by the text "These staff email addresses will receive gift notifications." Below this is a list of email addresses, with "steve@suran.com" shown in a pill-shaped button. Underneath is a text input field labeled "New staff email address" and a blue "Add" button.
- Fee Assist:** A header "Fee Assist" followed by the text "Provide gives the option of automatically increasing their gift to offset fees." There are two radio buttons: "Enable fee assist" (which is selected) and "Disable fee assist". Below this is a text input field labeled "Select the giving fund that should receive offset fee donations" with a dropdown menu currently showing "Fee Assist".
- Guest Gifts:** A header "Guest Gifts" followed by the text "Choose how should guest gifts be handled." There are two radio buttons: "Manually link gifts to Giving Unit using Process Pending Contributions" (which is selected) and "Create a new Giving Unit record for guests".

At the bottom of the form are two buttons: "Discard Changes" (grey) and "Save Changes" (green).

Staff Notifications – enter staff email addresses to receive emailed notification of online giving activity. Multiple email addresses may be entered, separated by a comma.

Fee Assist – Enable or Disable Fee Assist. When enabled, the donor will be asked whether they wish to “pay the transaction fees” thereby ensuring that the organization receives 100% of the donation. If enabled, you will next be prompted to select a giving fund that should receive these fee assist donations. We suggest that you set up a separate giving fund for fee assist donations.

Guest Gifts – Engage giving provides the tool that members/donors can log into their own Engage account to make a donation but it also allows for a Guest to make a gift without logging into an account. This setting determines how CDM+ Engage handles Guest Gifts.

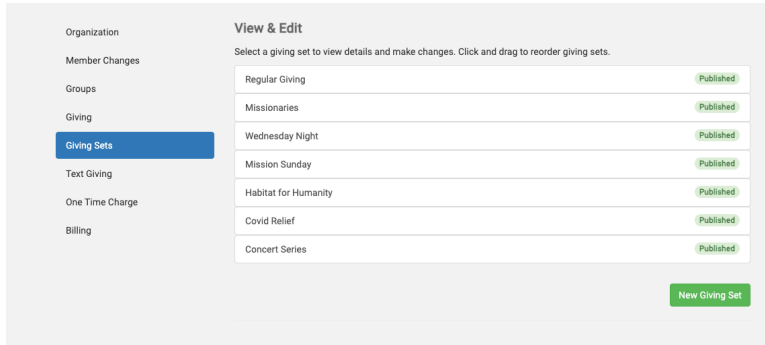
- Manually link gifts to Giving Units using CDM+ Desktop Process Pending Gifts or
- Create a new Giving Unit record for these guests.

Manually linking requires the staff to access Process Pending Gifts in CDM+ Desktop to either

- Link the gift to an existing giving unit (an existing donor that simply did not log into their Engage account)
- Create a new Giving Unit to link this gift to, or
- Link the gift to a miscellaneous giving unit, such as ZZVisitor.

Create a new Giving Unit record for these gifts. When this option is selected a guest gift will automatically create an Address record, an Individual record and a Giving Unit record and will record the donation to this new giving unit. This may result in duplicate address, individual and giving unit records in your database. CDM+ Membership and Contributions provide tools to merge duplicate records.

Create Giving Sets and Select Giving Funds



Giving sets can also be referred to as Giving Pages and represent a collection of one or more giving funds to which a donor may give to. Each Giving Set has its own link (or URL) which enables you to populate other webpages with the direct link to a specific giving fund.

Giving Sets allows you to group giving funds, making it easier both for donors to find destination funds and to establish links for specific fundraising campaigns. For example, if your organization is involved with Habitat for Humanity and have a dedicated webpage on your website for Habitat, that dedicated webpage may contain the link to the Habitat for Humanity Giving Set only.

Click "New Giving Set."

Name

This name will be displayed when making a gift to the set and on the New Gift page.

Enter the Giving Set name. This name will be displayed when making a gift to the set and on the New Gift page.

URL

Access the current giving set directly at this address.

Either accept the suggested URL for this Giving Set or enter a different one.

Giving Funds

These giving funds will be available when a giver selects the current giving set. The **description** will be displayed as the giving fund name on Engage.

Giving Fund Name	Description
<input type="button" value="x"/> Habitat for Humanity	Habitat for Humanity

Add giving fund...

Select Giving Funds - These giving funds will be available when a giver selects the current giving set. The description will be displayed as the giving fund name on Engage. The Giving Fund Name and the Description do not need to match.

Clicking “Add giving fund” will open a display of each ACTIVE giving fund set up in CDM+ Desktop Contributions. You may select as many giving funds to include in the set. You must select at least one giving fund in order to have this Giving Fund Set be active. While there is no limit to the number of giving funds that may be included, it is a good practice to limit the number to what will display on one mobile phone screen.

Publish to New Gift Page

Choose whether to publish this giving set to the new gift page.

- Publish this giving set to the new gift page
- Do not Publish this giving set to the new gift page

Refer to the right-hand image on **Page 29-1**. This setting determines whether this giving fund set will be included on the New Gift page. If you do not publish this set, you will need to place the Giving Set URL (set on the prior page) somewhere on your website in order for people to use it to make donations.

Recurring Gift

Choose whether to allow recurring gifting for this giving set.

- Enable recurring gifts
- One-time gifts only

If enabled, the donor will be able to set up an automatic, recurring donation to this giving set (weekly, monthly, annual, etc.)

Allowed Payment Methods


Choose which payment methods are allowed for this giving set.

- All
- Credit/Debit Card only
- Bank Account only

If you wish to limit payment methods that can be used with this Giving Set, make your selection here.

Banner Image

Upload an image to be displayed atop the giving set.



Upload an image to be displayed atop the giving set.

You also have the option to enter -

- Header text which will sit atop the giving set
- Footer text which will sit at the bottom of the giving set
- Background Color
- Background Image which will appear in the background of the giving set

Engage Text Giving

Engage Text Giving is an optional add-on subscription to Engage and allows donors to send a SMS text message to a phone number assigned to your organization. The text message is simple – an amount and a short code.

When you enroll, you will determine whether you want a local phone number or a toll-free phone number as the number that your donors will send a text message to with their donation. There is a registration process for both types, which can run up to a month. Toll-free numbers are recommended as they are the most cost-effective, having a lower monthly charge and no setup fees.

Once you have enrolled and received your Engage Text Giving number, Text Giving must be configured.

On the Engage Administration screen, select Text Giving.

Number

Members can make a gift by texting to this phone number.

1 (612) 699-3183

Default Commands

These are built-in commands and cannot be modified.

Action	Command
Disconnect your phone number from your CDM+ Engage account:	REMOVE, UNSUBSCRIBE, STOP, END, CANCEL or QUIT
See a menu of existing giving commands:	HELP or MENU
Respond to various prompts in the text giving process:	YES or NO

In order for donors to make a text gift, you must first set up those giving funds that you wish to make available to text giving.

Funds

These funds will be eligible to receive donations through text giving.

Fund Name	Description	Command (letters only, no spaces)
<input type="checkbox"/> Promise 2023	Promise 2023	GEN
<input type="checkbox"/> Lift High the Cross	Building	BLDG
<input type="checkbox"/> Missions	Missions	MISSION

Add fund... ▾

Click "Add fund..." to open a drop-down list of giving funds already established in CDM+ Desktop Contributions. Once selected, the Fund Name is populated. The Description field is also populated with the same description but you can alter this and provide a different description. Lastly, you will enter the command or short-code that the donor will use when making their text gift. As the command is part of the text message sent by the donor, it is recommended that you keep these commands fairly short.

In the example above, three giving funds have been selected and short code commands set up. The available giving funds are from those already set up in CDM+.

The command REMOVE is automatic and if texted to your Engage Text Giving phone number, will disconnect the mobile phone number from the donor's Engage account.

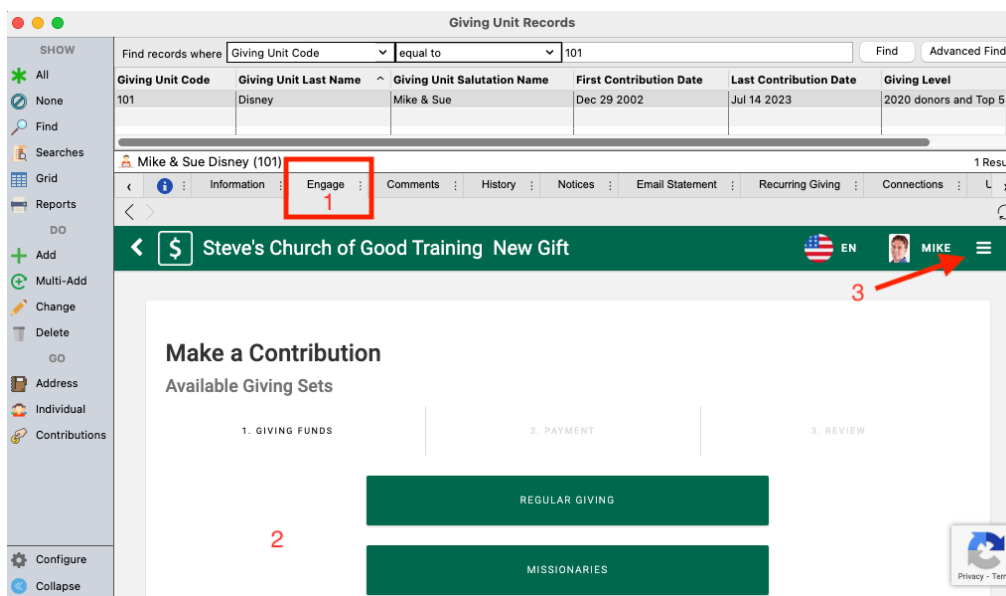
Administering CDM+ Engage Giving

Administrators can work with member/donor Engage Giving accounts within CDM+ itself. This allows staff to:

- Create Engage accounts for members (not covered in this class)
- Create one-time electronic donations for members
- Maintain member's payment methods
- Create and maintain recurring scheduled donations for members

This is done on the Giving Unit Record window.

Administering Member's Engage Giving Account



In CDM+ Contributions, the Giving Unit Record window now offers a new tab, Engage (#1). Selecting this tab opens CDM+ Engage Giving with the giving unit selected.

#2 – You may begin the process of creating an electronic gift, just as though the member logged into their own Engage Giving account.

#3 – Other Engage Giving activities, such as viewing scheduled gifts, managing payment accounts, or repeating recent online gifts, are available from the navigation menu.

Using Engage Giving – Creating a Member Account

Members initially need to visit the organization's Engage Giving website using the browser on their computer or smart device. Once there, they have an option on the smart device to add this link to the Home screen of their device.

The Engage Giving website can be provided to prospective donors as a URL or as a QR code.

As a URL:

[https://engage.suran.com/\[your organization\]/s/login](https://engage.suran.com/[your organization]/s/login)

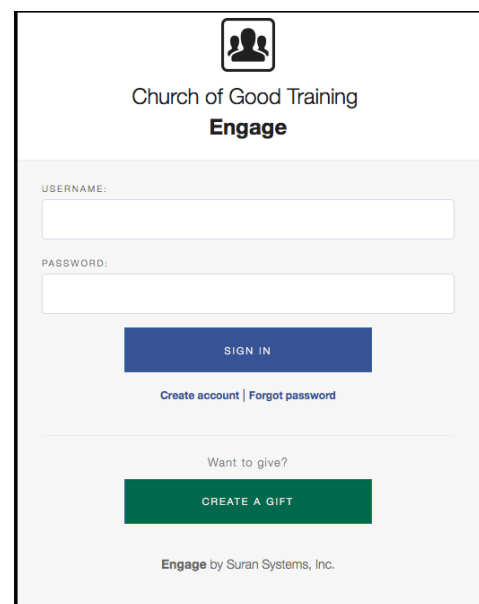
As a QR code:



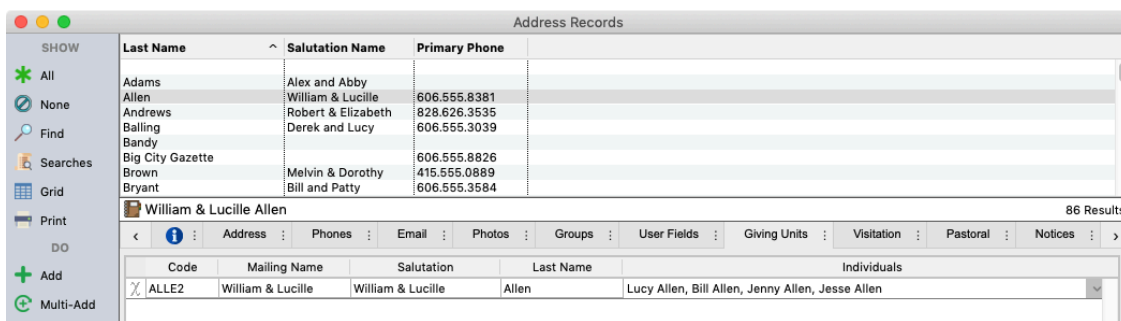
A QR code is simply a graphic representation of a URL. You can download a QR code directly from the Engage Settings and share it on signs, bulletins, or anywhere you want to promote Engage.

When launched, the first thing the donor will notice is that Engage Giving is personalized, displaying your organization name and logo, if uploaded, at the top of the screen.

In order to create an account, a donor does NOT need to be in your CDM+ Membership Database. If the email address used during the registration process is not located in your CDM+ Membership Database, an Address, Individual, and Giving Unit record will automatically be created and tied to the Engage account.



► Membership ► Address Records ► Giving Unit



Last Name	Salutation Name	Primary Phone
Adams	Alex and Abby	
Allen	William & Lucille	606.555.8381
Andrews	Robert & Elizabeth	828.626.3535
Balling	Derek and Lucy	606.555.3039
Bandy		
Big City Gazette		606.555.8826
Brown	Melvin & Dorothy	415.555.0889
Bryant	Bill and Patty	606.555.3584

Code	Mailing Name	Salutation	Last Name	Individuals
ALLE2	William & Lucille	William & Lucille	Allen	Lucy Allen, Bill Allen, Jenny Allen, Jesse Allen

Also, we recommend the Address Record for the Giving Unit to have a correctly formatted address and phone number. For an address to be complete, there must be a street address in at least one of the address lines.



A little work in your CDM+ database before or sharing the link to your Engage Giving URL will help make the login process go smoother for your members. We suggest you do the following:

Clean up your Address Records, checking that:

- All **Individuals** are linked to their **Giving Unit**
- **Addresses** have a street address

Contact your givers explaining:

- You must have a valid email address in their record if they want to use Engage Giving.
- They will be able to securely view Giving History in addition to setting up recurring gifts.
- They will be able to print their giving statements.”
- Their email address(es) will never be published without permission.
- They will be able to print their giving statements.

Creating a New Account – Members

Your members will navigate to your Engage URL, and each person can create their own Engage account, which consists of a Username and Password of their choosing. A valid email address is required. The on-screen prompts will direct them through the following steps. The process to reset a forgotten password is the same as setting the password when the account is created and is also covered below.

When a member wants to create a new account in Engage Giving, they will select **Create Account** link from the Engage login page.

The member will enter their email address and click **Register**. If there are multiple names linked to that email address in your CDM+ database, those names will be displayed and they will select their own name from the list.

The next prompt will ask the member to create a Username. This username will be used to login into Engage

An email will then be sent to the email address entered. This email will contain a password code which is then used to set (or reset) the member’s password.

The member will either:

Click the **Reset Password** link in the email, or

Navigate to the URL provided in the email message and copy/paste the temporary password into the Password Code box and click **Check Code**.

The member will then create a new password and click **Submit**. They will be redirected to the Engage Giving URL.

NOTE: The member may reset an existing (forgotten) password simply by clicking the *Forgot Password* link on the Engage Giving login page and following this procedure.

Creating A New Account – Visitors/Guests

As mentioned above, to create an account, a donor does NOT need to be in your CDM+ Membership Database. If the email address used during the registration process is not already in your CDM+ Membership Database, the visitor/guest can still create an Engage Giving account. When the account is created in Engage, an Address record, Individual record, and Giving Unit record will be created in CDM+ and tied to the visitor/guest's Engage account.

This capability is controlled by the Engage setup. Here, the organization may elect to allow or not allow the

automatic creation of visitor/guest accounts.

Obviously, the benefit of allowing this is to allow visitors/guests to make and schedule recurring contributions without having to contact the organization office.

When a donor whose email address is not in your CDM+ database creates an account in Engage Giving, they select the same **Create Account** link on your Engage Giving login page. The visitor/guest will also enter an email address and click **Register**.

Church of Good Training
Engage

USERNAME:
PASSWORD:

SIGN IN

Create account | Forgot password

Want to give?
CREATE A GIFT

Engage by Suran Systems, Inc.

Church of Good Training
Engage

Sign up for Engage.

EMAIL ADDRESS
velcrodad@gmail.com

No users found for velcrodad@gmail.com. [Click here to create a new account.](#)

REGISTER

< BACK

Engage by Suran Systems, Inc.

Engage will alert the visitor/guest that the email address was not found and will prompt the person to **Click here to create a new account**.

Here, the account creation process differs from that faced by the member logging in for the first time.

For members, it is assumed that the member's mailing address is already in CDM+. For visitors/guests, Engage will prompt the donor to provide their mailing address. All fields are required.

After completing the required information, the visitor/guest will click **Create Account**.

Church of Good Training
Engage

Create a new account.

FIRST NAME LAST NAME
First Name Last Name

EMAIL ADDRESS
velcrodad@gmail.com

ADDRESS
Address

CITY
City

COUNTRY STATE ZIP
US State Zip

CREATE ACCOUNT

< BACK

Engage by Suran Systems, Inc.

The remainder of this process is the same for visitors/guests, as that described for members on the preceding pages.

The visitor/guest is prompted to create a username. An email is sent to the visitor/guest at the email address

provided with a link and a Password Code. The visitor/guest can click the **Reset Password** link, or they can copy/paste the URL provided into a browser, copy/paste the Reset Password Code, and click **Check Code**.

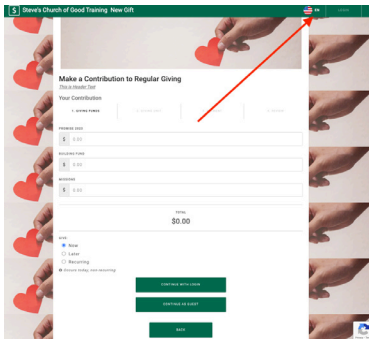
The visitor/guest is then prompted to create a password for future use.

The visitor/guest with an Engage Giving account may reset an existing (forgotten) password using the Forgot Password link on the Engage Giving login page.

Using Engage Giving – Making a Donation

Engage Giving offers two different ways for a member or visitor to give: with or without logging into an account.

Guest Giving (giving without logging in)

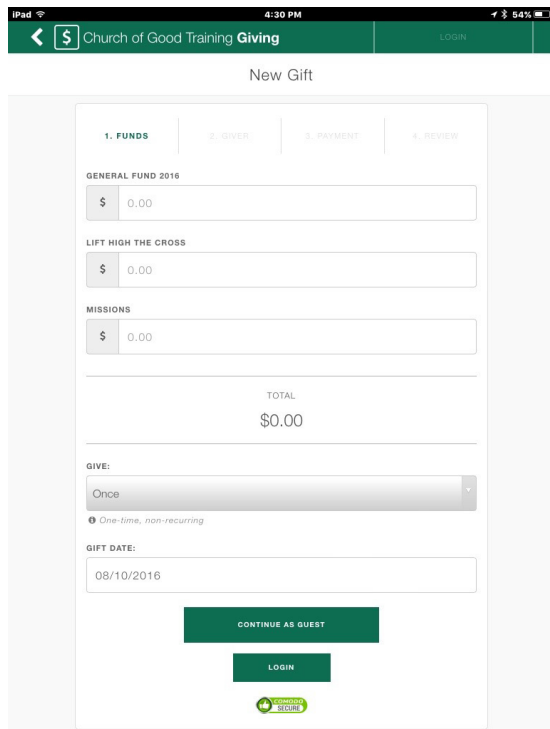


Clicking the green Create a Gift button will open the “New Gift” entry screen.

Depending on the setting for Recurring Gifts in Engage Giving Setup, the member or visitor will enter the frequency of the gift. The default is once.

New – Giving Pages can now translate into Spanish. Click icon in upper right area to toggle between English and Spanish.

Giving Funds selected at the time of setting up Engage Giving are presented to the donor. (This selection process is described later in this chapter.)



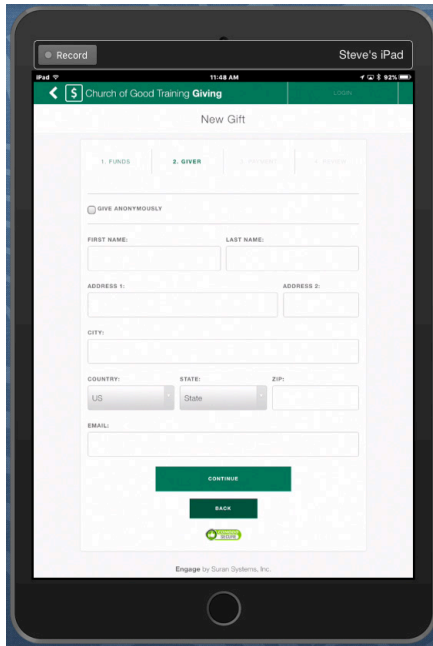
The member or visitor can choose one, multiple, or all Giving Funds for this gift.

The member or visitor will enter the desired amounts to the selected giving funds.

The member or visitor will enter the frequency of the gift. The default is once.

If scheduling a future or recurring gift, the member or visitor will enter the date of the gift. The default is today's date.

The member of visitor will click the green “Continue as Guest” button.



The next screen prompts the donor to enter their name, postal address, and email address. This screen also offers the donor the option to **Give Anonymously**. If the Guest Gifts option in Engage Giving setup is set to automatically create a new Giving Unit for guest gifts, or the gift is recurring, Give Anonymously is disabled.

For the recipient of the funds (you, the CDM+ user), there are important differences behind the scenes between “Giving as a Guest” or giving Anonymously.

Both Guest Gifts and Anonymous Gifts use the “Process Pending Gifts” function in CDM+ Contributions to link gifts to an existing giving unit, create a new giving unit, or link to a ZZVisitor type giving unit, but:

- With an anonymous gift, the Billing name/address is NOT passed into CDM+ and the “Process Pending Gifts” process shows these as coming from an “Anonymous Giver.”
- With a gift that is not anonymous, the giver's name, address, and email address are passed into CDM+.

STEVE'S CHURCH OF GOOD TRAINING
123 Main Street
Big City, NY 43123
606/555-1234

PAYMENT INFORMATION XXXXXXXXXX1111 12/2024 steve@suran.com	BILLING INFORMATION Steve Hapsorn 727 East Sherwood Avenue St. Paul, MN 55106-1714 US
--	--

GIVING FUND Promise 2023	AMOUNT \$51.00
------------------------------------	--------------------------

CHANGE AMOUNTS

I would like to increase my donation to offset processing fees.

TOTAL	\$51.00
CONTRIBUTION OCCURRENCE	One Time
CONTRIBUTION DATE	Sep 7 2023

CONTRIBUTION MEMO:

B I U [List Bullet] [List Number] [List Circle] [List Square]

600 characters remaining

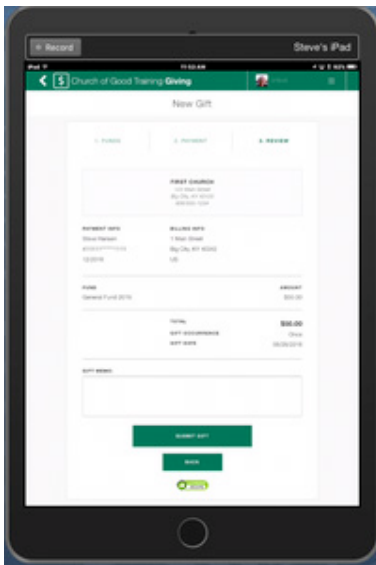
SUBMIT CONTRIBUTION

The next screen offers the funding source – credit, debit card or bank ACH – whichever payment methods are select on the giving set setup.

If FEE ASSIST is enabled, the donor check the box on the line reading - I would like to increase my donation to offset processing fees” appears. If they do, CDM+ Engage will calculate and display the added fees.

The billing information “Same as Giver” checkbox defaults to checked. If the giver unchecks this box, they are prompted to provide a separate billing address.

After completing the payment information – and the billing address if they unchecked "Same as Giver – the donor will click or tap **Continue**.

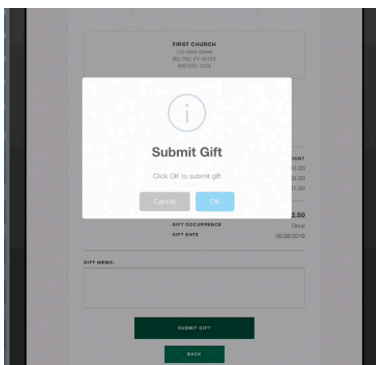


Before the gift is submitted, the giver is presented with a confirmation screen asking them to verify the information captured on the preceding screens.

On this confirmation screen, a gift memo box is offered where the giver can make any special notation about this donation.

If needed, the giver can click or tap the **Back** button to make changes.

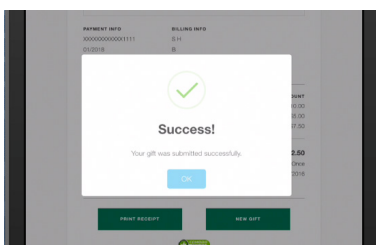
Once satisfied with the details presented on the confirmation screen, the giver with click or tap **Continue**.



A **Submit Gift** pop-up window appears with two options: **Cancel** or **OK**.

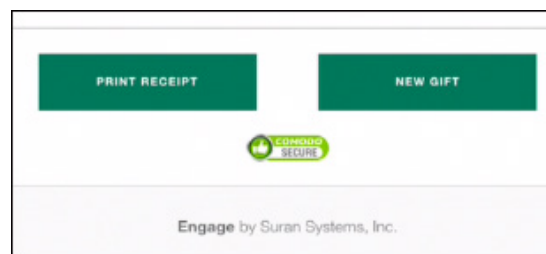
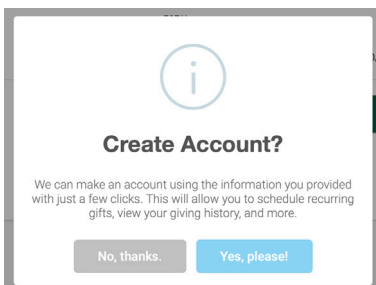
To proceed with the donation, the giver will click or tap **OK**.

At this point, the gift is being processed. While it processes, three dots appear and move, indicating the process is working.

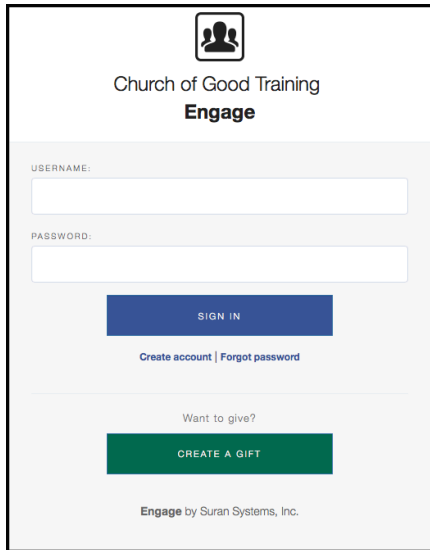


Once the gift has completed processing, the **SUCCESS!** Window appears. After clicking **OK**, Engage will ask the giver if they want to create an account. If the giver clicks **Yes**, they will be directed to create an account as described above. Engage will use the email from the gift to attempt to match the giver to an existing record in your CDM+ database. If a new record is created, Engage will use the address information from the gift to create the new record. In either event, the payment information and gift will be linked to the new account once logged in.

If the giver bypasses account creation, they will have an option to **Print Receipt** or make a new gift.



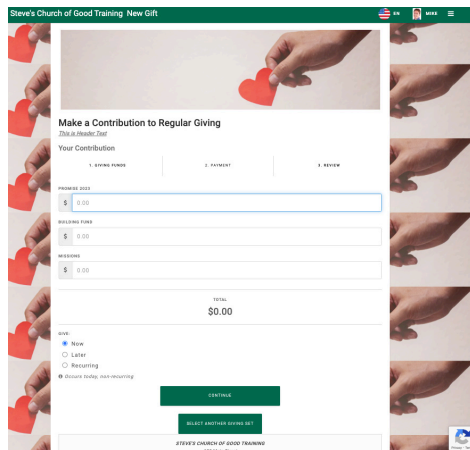
Sign In to Give – Donor Has (or will create) An Engage Giving Account



The screenshot shows the login interface for the Church of Good Training Engage system. At the top, there is a logo with three people icons and the text "Church of Good Training Engage". Below the logo are two input fields: "USERNAME:" and "PASSWORD:". A blue "SIGN IN" button is positioned below the password field. Underneath the button are links for "Create account" and "Forgot password". A green "CREATE A GIFT" button is located below the "SIGN IN" button. At the bottom, there is a link "Want to give?" and the text "Engage by Suran Systems, Inc."

The donor will enter a username and password and click **SIGN IN**.

Note that the donor can also create an account or request a password reset from the login screen.



The screenshot displays the "New Gift" entry screen. The title is "Steve's Church of Good Training New Gift". The main heading is "Make a Contribution to Regular Giving". Below this, there are three tabs: "YOUR CONTRIBUTION", "PAYMENT", and "REVIEW". The "YOUR CONTRIBUTION" tab is active. It contains three input fields: "PAID AMOUNT", "BALANCED FUNDS", and "RECURRING", each with a dollar sign and a value of "0.00". A "TOTAL" field shows "\$0.00". There are radio buttons for "New", "Legacy", and "Recurring", with "Recurring" selected. A "Continue" button is at the bottom. The background features a collage of hands holding red hearts.

The **New Gift** entry screen appears.

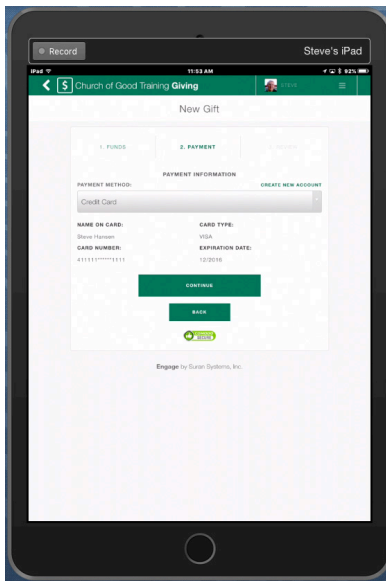
Again, the selected Giving Funds or Giving Fund Sets are presented. The donor or visitor can choose one, multiple, or all Giving Funds for this gift.

The donor or visitor will enter the desired amounts to the selected giving funds.

The donor or visitor will enter the frequency of the gift. The default is once, but may be changed to one of several common frequencies. The donor will open the dropdown menu to select a different frequency.

The donor or visitor will enter the date of the gift. The default is today's date, but the donor can schedule the gift for a later date.

When satisfied with the entries on this screen, the donor will click the green **Continue** button.



The next screen allows the donor to select the funding source.

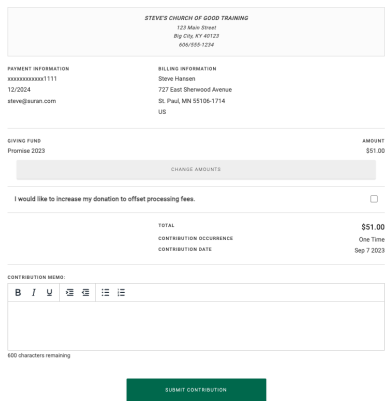
All stored funding sources are available with the most recent account used selected by default.

The donor may select a different funding source by clicking on the dropdown menu and choosing a different payment account.

The donor may add a new funding source by clicking **Create New Account** above the dropdown.

For whichever account is selected, the funding source details are displayed.

When the donor is satisfied with the choice of a funding source, he or she will click or tap **Continue**.



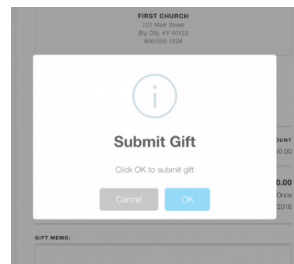
Next, the donor is presented with a New Gift confirmation screen containing the information entered: payment information and the details of the gift.

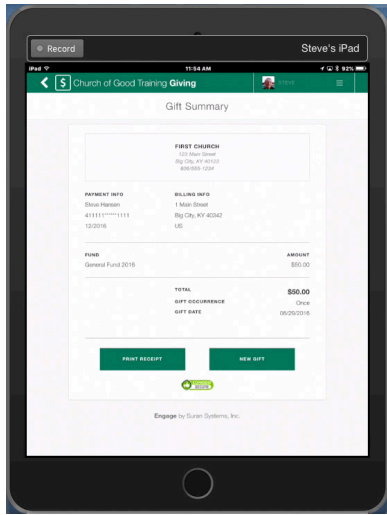
If FEE ASSIST is enabled, the donor check the box on the line reading - I would like to increase my donation to offset processing fees" appears. If the donor has set this as their default, CDM+ Engage will calculate and display the added fees. If they have not set as their default, they can still elect to check this at this time.

A gift memo box is offered to make any special notation for this gift.

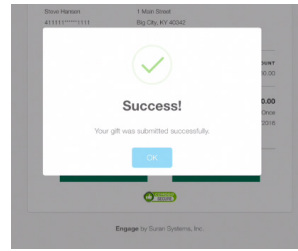
The donor may click or tap the **Back** button to make changes, or the **Submit Gift** button to proceed.

A final Submit Gift confirmation screen appears. The donor will click the Cancel button to exit or the OK button to proceed. Once the donor clicks the OK button, the gift is being processed. While it processes, three dots appear and move, indicating the process is working.





Once the gift has completed processing, the SUCCESS! Window appears. Clicking **OK** displays a gift summary window, again providing the details of the gift and offering a "Print Receipt" button at the bottom.



Regardless of which giving method is used, two emails are sent immediately. One, a standard receipt, is emailed to the donor at the email address used or linked to the account. The second email is sent to a staff email address, advising that an online gift has been received or a recurring gift has been established.



Thank you for your payment!

I want to say thank you for your donation to The Church of Good Training. We're honored you would bless us with your generosity. Donations like yours make a big difference in the work our church is doing in the community and around the world. Without givers like you, our church would not have the impact or influence it does. Because we're a tax-exempt nonprofit, you also get to write this donation off on your taxes. At the end of the year, we'll send you an annual recap with how much you've given to the church. The Church of Good Training. Sincerely, Pastor Dean Patterson, Lead Pastor Per IRS regulations, we state that the only benefit received by the donor is an intangible religious one.

Giver

Steve Hansen
727 East Sherwood Avenue
St. Paul
MN
55106-1714

Payment

*****7890
****0269*
ACH

Giver

Steve Hansen
727 East Sherwood Avenue
St. Paul
MN
55106-1714
steve@cyber-ras.com

Gift

9/6/2023
11642
Processing
0 - APPROVED SUCCESS. The Payment was created successfully
Engage (Guest)
\$10.00

Details

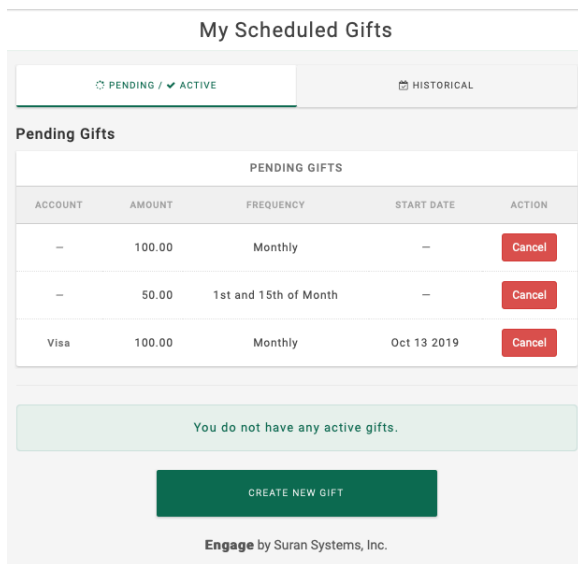
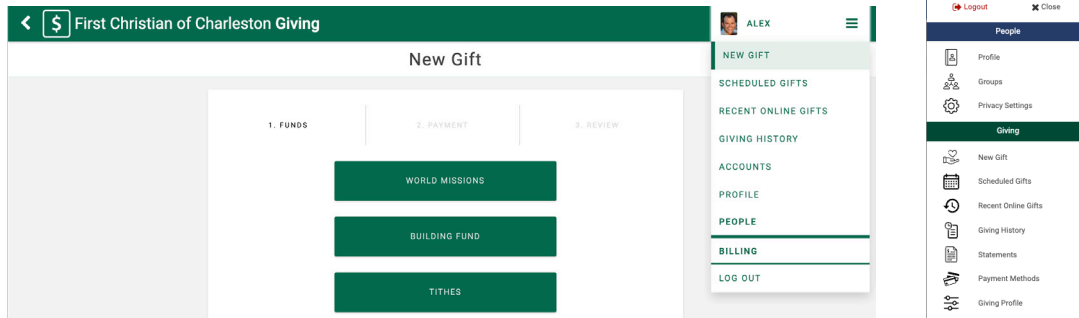
John & Mary Peterson
€10.00

Other Options Available in Engage Giving When Logged In

When logged in, opening the hamburger menu in the upper right displays several additional options.

Make a gift – see prior pages.

Scheduled Gifts – shows two tabs: Pending/Active and Historical



Pending Gifts are those that have been created but not yet processed.

Active Gifts are those that have been created and processed at least once and which are scheduled to process again.

Historical Gifts are those that have been processed and will not process again.

Example 1: a one-time gift given last week is historical

Example 2: a one-time gift given today would be pending

Example 3: a recurring gift scheduled as monthly for 6 months will show as Active during those 6 months, but as historical after the 6 months.

Recent Online Gifts

RECENT GIFTS			
ACCOUNT	AMOUNT	FREQUENCY	ACTION
Visa	\$25.00	One Time	Give Again
MyBank	\$100.00	One Time	Give Again

[NEW GIFT](#)

Engage by Suran Systems, Inc.

Recent Online Gifts displays the last several gifts that have been made with an option to Give Again. If **Give Again** is selected, the gift confirmation window opens for the donor to confirm the gift.

Stew's Church of Good Training Giving History

GIFT DATE	TOTAL AMOUNT	PAYMENT METHOD	EVENT	ACTIONS
Jul 14 2023	\$70.95	Credit Card	--	Details
Jul 3 2023	\$51.80	Credit Card	--	Details
May 24 2023	\$18.23	ACH	--	Details
May 24 2023	\$18.62	Credit Card	--	Details
May 19 2023	\$10.61	Credit Card	--	Details
May 19 2023	\$10.38	ACH	--	Details

Giving History – displays a history of the member’s giving, both in-person and online.

START DATE	END DATE	# OF CONTRIBUTIONS	TOTAL AMOUNT	ACTIONS
Jan 1 2022	Dec 31 2022	166	\$17,904.24	View/Print Download
Jan 1 2023	Mar 31 2031	30	\$2,944.82	View/Print Download

[Back to Giving Statements](#)
[Print Online Giving Statement](#)
[Download Online Giving Statement](#)

Statements - when the organization produces a batch of online giving statements, the donor may view theirs here. The donor may simply view the statement, print the statement or download a pdf version.

Contribution Report for Jan 1 2023 to Dec 31 2023

Generated on Jul 14 2023 09:58 AM

Steve's Church of Good Training
123 Main Street
Big City, KY 40123
606/555-1234

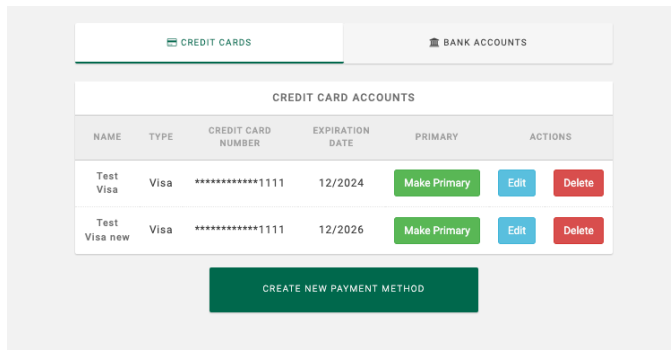
101
Mike & Susan Diener

Jul 14 2023	Credit Card	--	50.00	Promise 2023
Jul 14 2023	Credit Card	--	2.35	Fee Assist

Multiple batches may be shown – 1st quarter, 2nd quarter, Year-end 2022, Year-end 2023, and so on.

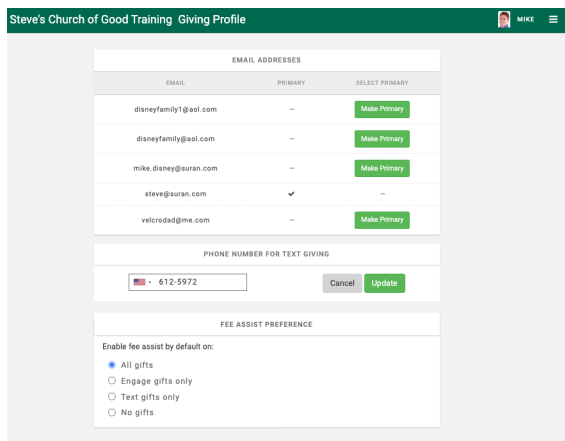
Giving Fund	Report Total
Promise 2023	220.56
Lift High the Cross	599.86
UCA	1,024.00
Missions	156.06
Memorial	15.00

Pledge information will NOT be displayed on Online Statements.



Accounts – displays existing funding accounts, credit/debit cards, and bank accounts. The member may add new accounts or delete existing.

One account, either credit/debit or bank account, should be set as the Primary account. The donor may add new accounts or edit/delete existing.



Profile – select the email address where gift confirmation should be sent, enter or edit your text giving phone number, and set the Fee Assist preference..

Using Engage Text Giving

When an Engage giver wants to make a text gift, they will send a text message to your SMS Giving Number in the format [command] [amount]. So, for example, if the Text Giving command for the Building Fund is BUILD and a giver wants to make a \$100 gift to the Building Fund, they text 'BUILD 100' to your SMS Giving Number.

The first time someone uses text giving, Engage needs to connect their mobile number to their Engage account. So for the first text gift, Engage will respond with a link for the user to log into their Engage account.

Please visit https://engageapproval.suran.com/trunk/s/give/new-gift?phone_number=1 to make your gift.

Once the giver has logged into their Engage account, Engage associates the mobile number with the

Engage account so that subsequent gifts from the same mobile number are credited to the giver with that Engage account. Engage will reply to subsequent gifts with a confirmation message.

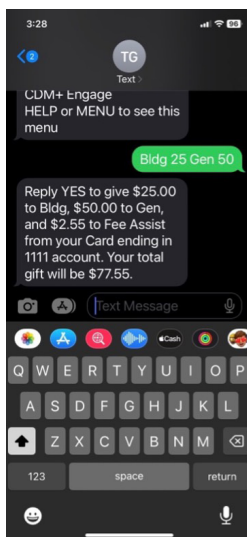
Reply YES to give \$20.00 to Other from your Terminal VISA account.

Yes

Submitting your gift...

Success! Thank you for your gift of \$20.00 to Other. You will receive an email confirming your gift to

A split donation to multiple giving funds is also available with Engage Text Giving. Simply enter a series of command-amount, command-amount and Engage Text Giving will interpret and display the following screen.



Removing a Mobile number from Engage Text Giving

If a user wants to disconnect their mobile number from their Engage account, they can text REMOVE to your SMS Giving Number. Engage will respond with a confirmation message.

