ChurchSquare Member Directory Guide

Version 1.4

Proper Document Usage and Document Distribution

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Member Directory Overview

This document discusses the Member Directory but the member directory is closely connected to several other ChurchSquare Site Manager functions:

Page Security -- Page Security allows you to password protect pages on your website. You set up the password by building user profiles. These can be the same user profiles used in your member directory. See Appendix I for further information on Page Security.

Mailing List -- ChurchSquare site plans 'Interactive' and above have the capability to develop multiple mailing lists. If you enable and create multiple mailing lists, users can opt-into and out of mailing lists by editing their user profile. Further information is available in Appendix II.

e-Commerce/Donations -- On ChurchSquare eStore sites the login for e-Commerce customers is the same login they use for their account profile. This feature is useful for organizations using the e-Commerce donation subscription capability. Further information about Donation Subscriptions is available in Appendix III.

Along with the member directory, these functions form a member management system that features communication management, member directory and profile management, website security access and donation and e-commerce management.

The Member Directory has unique functions that allow you to increase communication with your members and between your members:

- **Customizable** - The information in the directory is completely customizable. You can select the information you collect and the information you display.

- **Searchable** - The user directory is completely searchable for first name or last name, users can also page by the first letter of the last name.

- **Expandable** - You can add as many different mailing list to your site as you need and users can select the mailing lists they want to be on.

- **Flexible** - You can create more than one member directory for your site. For example, you can have a directory of members of a Sunday School class or members of a Committee. You use the same profiles created in the main directory and move those

into your special Member Directory. You can even change the information contained in the special directory.

- **Secure** - You can choose to allow members to add their own profiles but require members to enter an authentication key, preventing non-members from Spamming your site. You can also choose to password protect your directory (using the page security upgrade) or have the directory unsecured, such as a directory of your church staff.

Creating a New Member Directory

There are three steps for creating your member directories:

1. Set up the user group

2. Create the page to access and view your directory

3. Structure the content of your directory.

Setting Up the User Group

The member directory uses the member profiles in a user group as a member directory. A user group is a series of site user profiles. Profiles can be pulled into a user group or created in the directory. That user group then forms the basis of a directory.

User groups may also be used to select profiles for page security - allowing only members of that user group to view a page. The user groups can be used for both purposes simultaneously; for example, you may decide to password protect a member directory and add page security to the directory that only allows members of the directory to see the directory. (Page security is an upgrade for most plans.)

To add a new user group login to your site and click on 'User Groups' from the admin page. On the user group page you may see several types of groups. If you have an e-Commerce enabled site you will see e-Commerce groups. You will also see User Groups and, if you have enabled Account Based Mailing Lists (see the Mailing List page from the admin page), you will see Mailing List Groups.

Click on the 'create new group' link under User Groups, add a name for the group to the 'Group Name' and click 'Create User Group'.

Creating the Directory Page

Once the user group is created you will need to add a Member Directory Page. This page displays the user directory and also provides the site editor with the interface for structuring the directory.

To create the Directory Page go to the add page function on your website and select the 'user directory' page. Add a Page Name in the Page Name input box - keep it short as this will be the menu name. Select a location from the Page Location pull down list. You may want to add the page title and also set the page as 'under construction' until you are finished setting up the directory.

Under the User Directory Setup add a directory name to the user directory name input box. This name is not displayed on your site so just call it something intuitive like 'all members' or 'youth'. Next, select a user directory type; this will select the beginning data field structure for your directory. Typically you will want to select the Church Directory. Finally, select the user group for the member directory. This is where the profiles for the user directory will reside. Select the user group you created in the previous step.

Finally, click 'create page and view page'.

Structuring the Directory

Once your member directory page is created view the page. You want to view the page in Page View and not in Page Edit mode. A newly created member directory page should look like this:


The settings tab allows you to control the directory page set-up. The customize page/data fields link allows you to set up what information is collected in the profiles and how it is displayed on the 3 different page views (directory main view, user profile view, and user profile edit view). The user accounts link allows you to add member profiles to the member directory (it is the same as opening the User Group from the User Accounts page).

Settings

To set up the page, click on the settings link. The settings button allows you to set how many records are displayed on the page and whether you have an 'abc' index and search window.

Customize page/data fields

Access the user account fields by clicking on the link. After the data fields load, the customize Data Fields should look like this:
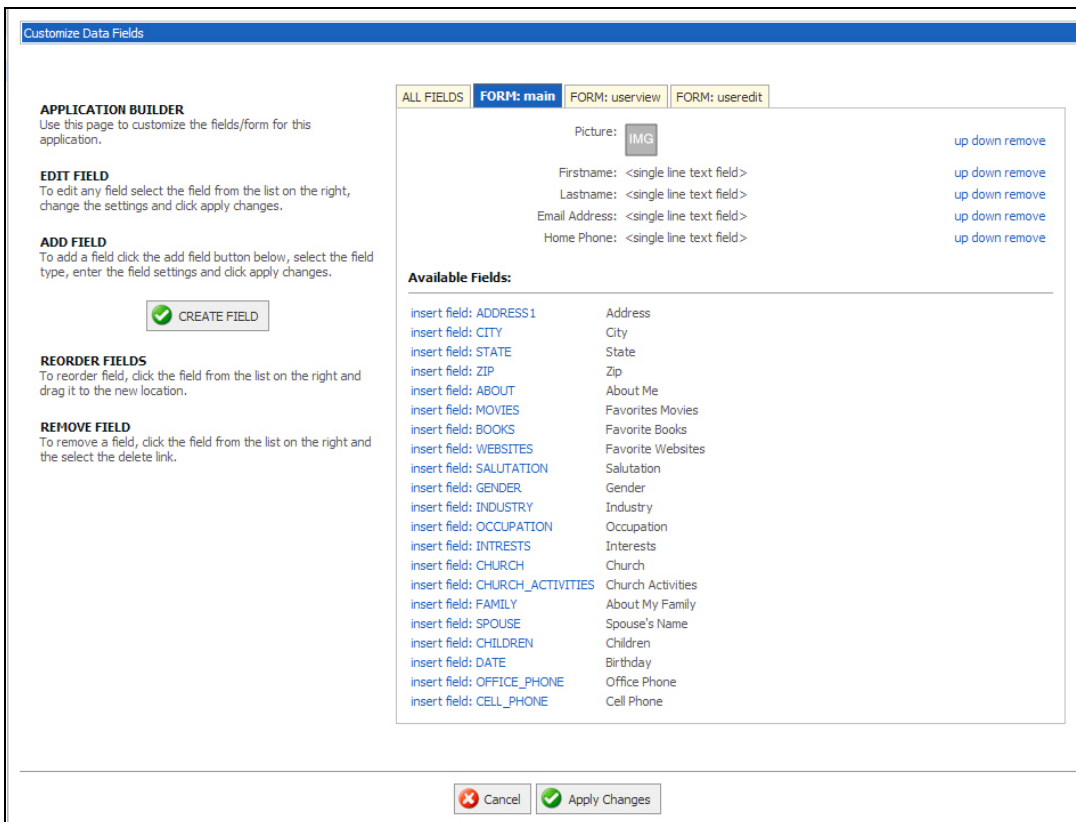
The page defaults to the main directory listings and there are tabs for the userview and the useredit.

The 'main' directory listing is the line-by-line listing of the members in the directory that appears on the opening page of your directory. You will want to keep this listing concise as your users will want to be able to quickly scroll through the listings, get contact information or click on the listing to view the user profile (the userview page). The default view is a thumbnail of the uploaded image, the first and last name and the persons email and home phone number. You can add fields by selecting fields from the Available Fields list of by clicking the 'Create Field' button on the left. Fields can also be moved or removed by clicking the appropriate link.

The userview page is a listing of variables that will display when a visitor to the member directory clicks on the 'view' link in the main directory. This is the detailed information in the user profile that will be displayed on the website to directory visitors. If you feel that some of the information may violate privacy concerns remove that variable from this display page. The same functions for removing, moving or adding variables are available on this page.

The useredit page is the form that displays to users when they create a profile. You may collect information on this page which you do not display on any of the directory pages. This information can be edited or made available to editors logged into your site. The same functions for removing, moving or adding variables is available on this page. This information is only available to the person logged in with that profile or a site editor.

> *TIP:*
>
> Make sure you save changes by clicking the 'Apply Changes' button at the bottom of the page. Save often and save before you tab to another page!

# Populating the Member Directory

The directory can be populated by adding profiles that are already loaded on the site and users can add their own profiles if you enable user account creation. With release of the Member Directory there is NOT a capability to upload members from another data source.

Adding in Profiles

To add in profiles to your member directory. You can either click the 'user accounts' from the member directory page or click on the 'User Accounts' link from the site Admin page and then on the name of the User Group. You should see a page that looks like the screen on the right.

If your site has profiles already loaded you can click on 'Assign Users' and select users from the list.
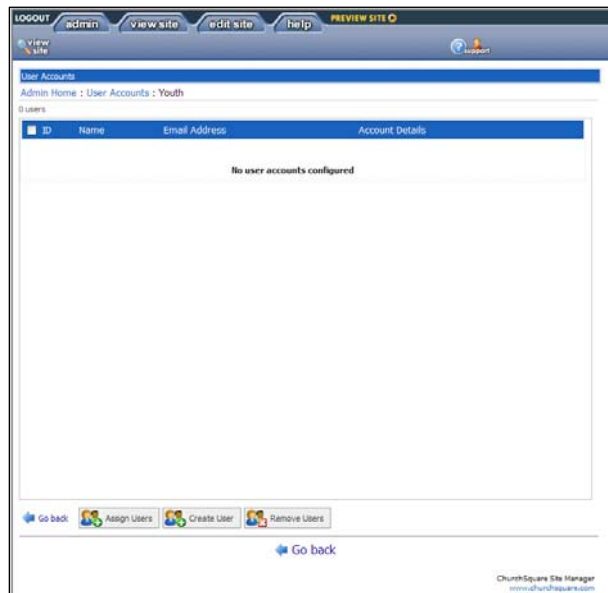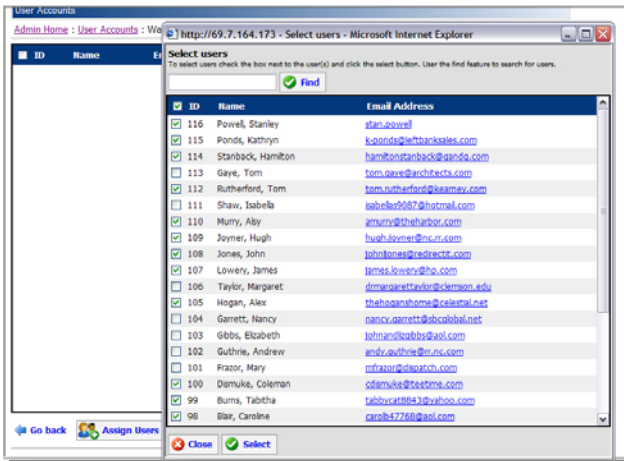
Once 'Assign Users' is clicked, a list of profiles appears. You can click on the check box in the top header to select all users or select users one-by-one. Click the 'Select' button to close the window and add the Profiles to your directory.
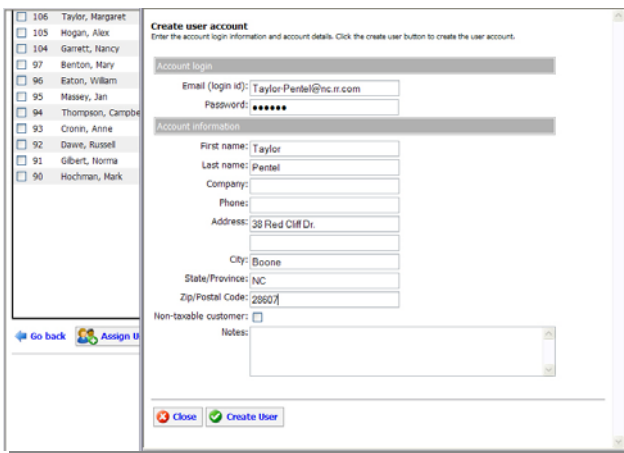
Users can also be added by clicking on the 'Create User' button. Fill out the user account form - only the Email login ID and Password are required fields, but we suggest adding at least the first and last name as well. Click the 'Create User' button to close the window and save the profile.

Self-Service Profile

Most Churches will want to enable their sites for self-service profile creation so users can create their own profiles. Users can then add their initial profiles. Users can edit and update their profiles whether or not you have user account creation enabled.

Creating the Account Login Form

First create an Account Login Form on your site. This form allows users to login to their account or create a profile. The Form can be added to a new page or to an existing page. Edit the page and add the Account Login Form to the page by clicking one of the Add buttons in the section headers and selecting Interactive and then the Account Login Form.

Enabling User Account Creation

So users can create their own accounts you will need to enable user account creation. This function is accessible from the Mailing List function (if your site plan has the Mailing List function) or from the Account Login Page that you created in the step above. From the mailing list click on 'enable user account creation' towards the bottom of the left hand column, or, from the Account

Login Page click on the 'customize user account settings' link. That should bring you to the site user settings page (pictured below).
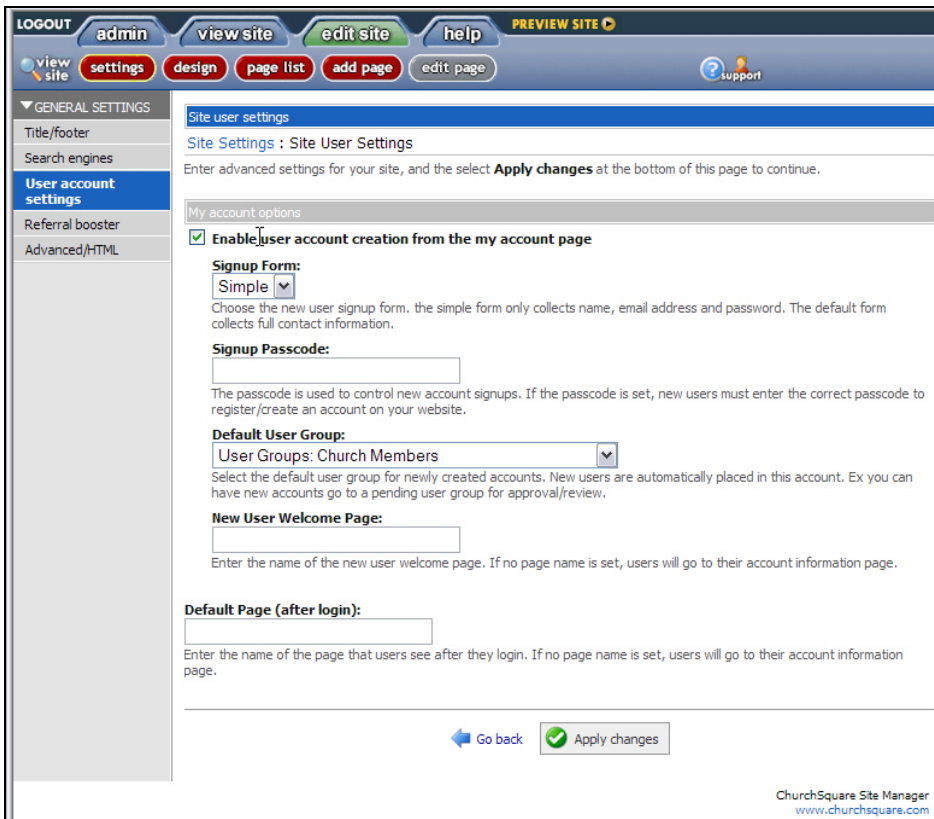
Check the "Enable user account creation..." checkbox. Select the signup form from the pull down list; the "Simple" form allows the user to quickly create an account without filling in all of the information. The "Default" form uses the entire useredit view of the form connected with the Default User Group - this can be daunting to fill out for the initial profile and may not be the correct profile for that person if you have multiple Member Directories on your site.

If you wish to use a Signup Passcode on your site enter your code in the input box. The passcode is used to control new account signups. If the passcode is set, new users must enter the correct passcode to register/create an account on your website.

Select a Default User Group from the pull down list. New users are automatically placed in this account. For example, you can have new accounts go to a pending user group for approval / review. Whatever group you select here will be the default useredit view a person sees when they edit their profile after login. (If the user edits their profile when they are viewing in it a specific member directory first clicks on their profile they will see the useredit view specific to that directory). If you have multiple member directories, it is advisable to place all new members in the Pending User Group.

Enter the name of the new user welcome page. If no page name is set, users will go to their account information page. You can create a welcome page for new users that might be used to explain how the member directory works, disclaimer about privacy or any other information appropriate to a new member.

Finally enter the name of the page that users see after they login. If no page name is set, users will go to their account information page. If you have more than on member directory on the site you could direct the user to a page with links to your different directories. Alternatively, you might direct members to a special members news page.

e-Commerce Profiles

If you have an e-Commerce enabled site users create profiles when they make purchases on your site. The 'All E-Commerce Customers' user accounts hold those profiles. E-Commerce customers can login to their account using the Account Login Page. When a user logins to their account they can edit their e-Commerce account information and view their prior order history. There are no links to view or edit their Member Directory profile if they are not also members of a User Group tied to a Member Directory. Once their profile is moved into a Member Directory User Group, the account becomes enabled to view and edit profile information.

Likewise, if a Member Directory user decides to purchase a product, they can (and should) use their Member Directory UserID and Password to login to the e-Commerce secure payment system to make their payment; their profile is added to the All E-Commerce Customers user accounts. Their user account is then enabled so they can check their order history from their edit view.

Note to Users of the 'Old' Member Directory

The old member directory and the new member directory are not compatible. There is no migration path from the old member directory to the new one. It will be very confusing to users if you have both the new and the old directory on the site at the same time. It is recommended that you remove access to the old directory by deleting the old members only page and any links on your site to the old directory.

Maintaining Member Directory

The Member Directory does not require any specific maintenance and user accounts can be maintained by users. However it may be useful to familiarize yourself with what can changed.
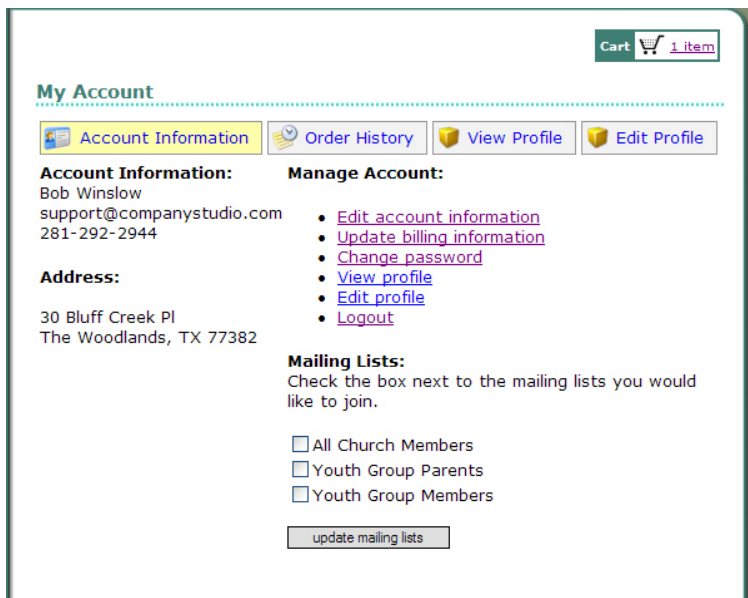
Changing Data Displayed

You can edit the data collected and displayed in a directory. Edit your site and go to the Directory display page and click on the 'Customize page/data fields' link. You will need to remove variables from all pages on which they are displayed if you do not want them in the directory. Remember to click 'Apply Changes' before exiting this page.

Account Maintenance

The Member Profile Accounts are completely self service. Once users login to their account they will see a screen that will depend on whether they are in a member directory, are an e-Commerce customer or both. A login screen for a user in a directory and an e-Commerce customer is pictured right.

Users can click the links to edit all of their profile information:

- Click on 'Edit profile' and change any variable in the

profile including their email, which doubles as their user login ID. They can only change their email if the new email they enter is not in use in another profile.

- Click on the 'Change password' link after they login to their account to change passwords.
- Click any of the mailing lists checkboxes to be added or removed from the email list.
- If they are an e-Commerce account they can also click on 'Update billing information' link and change or add a credit or debit card through a secure (https://) interface. This is very useful for users who have subscribed to a donation product or other subscription so they can update their billing information when it changes.

If the ChurchSquare site editor wants to make account changes they can login to the website as a regular ChurchSquare editor and access the profile. They can access the profile in the member directory or by clicking on the appropriate User Accounts from the User Accounts page (accessible from the Admin page). If the profile is accessed through the directory, updates can be made only to the useredit variables except the password. Billing information, the user group membership, mailing list sign-up and other data for other directories are not available. Changes to the profile are saved by clicking the 'Save Changes' button at the bottom of the page.

A more complete profile is accessible by clicking on the profile from the User Accounts page but still not the billing information, or other data for other directories. Click on the User Groups name and then on the 'Account Details' link for the profile you want to edit.

The three tabs along the top, 'Account Information', 'View Profile' and 'Edit Profile' give you access to edit the profile. From the 'Account Information', which is the default view, the members can be added or removed from user groups and mailing list groups. Once the changes are made, click the 'update groups' button to save the changes.

Clicking on the 'View Profile' link shows you the information in the profile while the 'Edit Profile' link allows changes to be made to the information. Once you make changes, be sure to click the 'Save Changes' button at the bottom of the page.

The 'Change password' link brings you to a change password page. The 'Edit account information' link allows you to change e-Commerce account information (but not billing information).

Deleting Old Profiles

To delete a profile access the profile through the 'User Accounts' page (accessible through the Admin page) by clicking on the appropriate user group and then on the user's 'Account Details' link. On the User Account Detail page unclick the selected user groups and mailing lists. If you unclick the 'All E-Commerce Customers' check box the user will no longer be able to login in to make purchases using their account. Once you click 'update groups' you will no longer be able to access that profile and a new profile using that email address CANNOT be created.

> **Tip**
>
> Instead of deleting a profile create a user group called 'User Profile Archive' and move obsolete profiles into that user group, removing them from all other users groups. That way you can continue to access that profile if you ever need it.

Change the Signup Passcode

If you enable the Singup Passcode on the site user settings, you may want to change that passcode routinely. Edit the site and go to the login page and click on the 'customize user account settings' link. Change the passcode and click 'Apply Changes'.

Working with Mailing Lists

The mailing list function is available on ChurchSquare plans Interactive and above. There are two types of mailing lists, the 'General mailing list' and 'Account based mailing lists'. The General mailing list is not tied to accounts and users opt-in to that mailing list through a mailing list link on your site. When you implement Account based mailing lists it is usually best to delete the links to the general mailing list access from your site. Having both types of lists on your site will surely confuse visitors.

Users can opt into the mailing lists when they set up their profiles. You can also edit their profile through the User Accounts page by clicking on the user group and then on the 'Account Details' link and click the appropriate Mailing Lists check box. You can also open a mailing list user group and move in users through the 'Assign Users' or 'Create Users' functions. The lists can also be managed by clicking on the appropriate 'manage users' link on the Mailing List page. See Appendix II for further information about mailing lists.

> **CAUTION:**
>
> Do not add names to email lists unless you are SURE that you have permission for the user to do so. Sending unsolicited email is NOT permissible for ChurchSquare customers. We take anti-Spamming practices seriously. Your site may be de-listed if we receive successive complaints of Spamming.

ChurchSquare Resources and Support

This manual cannot cover all possible instances you might encounter managing your Member Directory. There are several areas you can turn to for help:

- Your website contains overview instructions for many functions on the site. Make sure you are familiar with the information on these pages.
- When editing the site you can click on the support link located at the top of the page in the header to the right. The support link has three areas to help:
    - A list of help Topics in the right hand column
    - A knowledge base search box at the bottom of the topics column
    - A form for support questions if you cannot find the answer to you questions from the other resources.
- You can also contact ChurchSquare by emailing us at Support@ChurchSquare.com or calling during regular office hours (Central time) at 1-800-883-1773.

APPENDIX I: Page Security

Page Security allows you to assign access rights to site pages for individuals or groups or site visitors. When a site visitor navigates to a protected page the page content area is protected until the visitor enters their user name and password. Page headers, footers, navigation, graphics and any sidebar content is visible to visitors even if they are not logged in.

How Do I Set-up Page Security?

To set up page security, follow these three steps:

STEP I - Set up user access groups.

STEP II - Set-up and Assign Users.

STEP III - Enable and Configure Page Security.

STEP I - Set Up User Access Groups

What It Does: User Access Groups allow you to categorize users by the type of security access you would like them to have.

Where to Access: Login to your site, click on 'User accounts' from the Admin pag.e

How to Make it Work: Click on the "create new group" link and type in your group name and click the 'Create user group' button.

STEP II - Set-up and Assign Users

What It Does: Allows you to set up new users and to assign users to Access Control Groups. Security for pages can be assigned to individual users or to Access Control Groups.

Where to Access: Login to your site, click on 'User accounts' from the Admin page then click on the Access Control Group Name.

How to Make it Work: Create Users

- To create a new user click the 'Create User' button.
- Fill in the form, only the email (login id) and password are required.
- Click the 'Create User' button when done.
  Assign Users

- To add users to your Access Control Group click on the 'Assign Users' button.
- This brings you to the Master User List of all users (including E-commerce users if you have an E-commerce enabled site). Check the additional users you want to add to the Access Control Group.
- You can use the search function at the top of the page to find a user by entering part or all of the name and clicking the 'Find' button.
- Click Select.

STEP III - Enable and Configure Page Security

What It Does: Allows you to password protect page content and assign access rights to individual users or Access Control Groups.

Why it's Important: Quickly and easily configure page security for individual or groups of users.

How to Make it Work:
- Under 'Security settings' check the 'Enable page security' checkbox.
- Click on the 'Apply changes' button.
- Assign Groups
  - Click on the Assign Group button. Select the groups you want.
  - Click the 'Save' button.
  - If you want all registered users to have access you can assign all of the groups to the page.
- Assign Users
  - Try to use Access Control Groups instead of individual users for security control, this will minimize your maintenance issues.
  - Click on the 'Assign Users' button.
  - On the Assigned users page click the 'Assign users' button.
  - Check the additional users you want to have security access for the page.
  - Click the 'Select' button.
  - To remove already assigned users, uncheck the view checkbox.
 - Click the 'Save' button.

Usage Scenario

The Woodlands Outdoor Club (TWOC) is a fictional non-profit membership oriented website with two main membership groups; those interested in mostly the Water Sports Club and those interested in the Hiking and Biking Club. Since the site exists to promote club participation and membership interaction, site interactive tools like Chat and Message Boards are important - they need to be easily available but also secure to ensure member privacy. Also, because of its non-profit status, the volunteer financial committee needs easy and timely remote access to financial information but those page need to be secure.
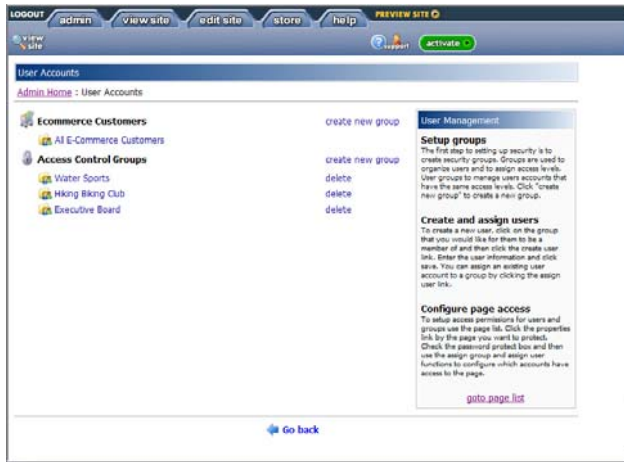
Create Access Control Groups:

TWOC choose to upgrade their account to include Password security and they added three Access Control Group in the User Accounts function (from the Admin console). They have an Access Control Group for Water Sports, one for the Hiking/Biking Club and a third for the Executive Board.
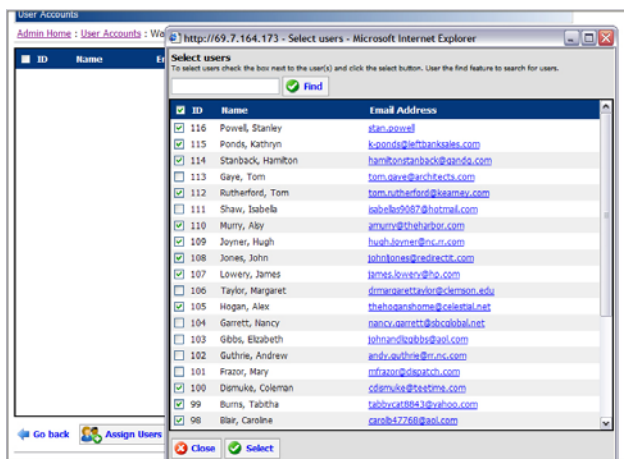
Add Users to Access Control Group:

Most of the users to be assigned to the groups were already in the Master List because the purchased memberships through the site and were in the All E-commerce Customers list. Clicking on the Assign Users button brings up the master user list. Click in the user name checkboxes and then the "Select" button adds the users to the Control Group.
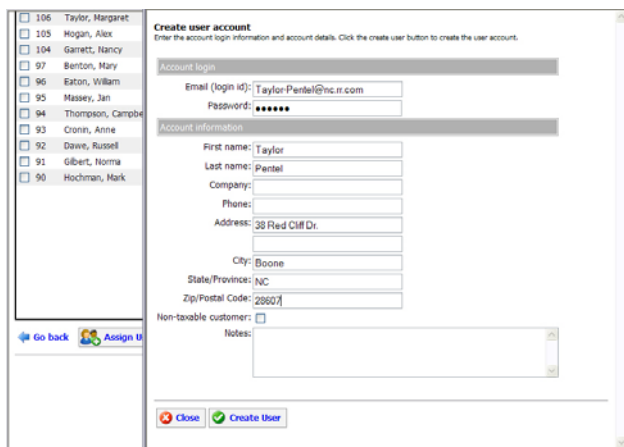

Add a User:

If the user does not already exist, it is easy to add them. Just click on 'Create User' button and fill out the user account form. Only the Email login ID and the Password are required fields.

Securing Pages:

The page list for TWOC site is accessed by clicking on the 'Page Manager' link from the Admin Console. The Page List shows the main menu and the sub-pages - the lock icon on the left shows which pages are secured. To enable or change security click on the 'properties' link.
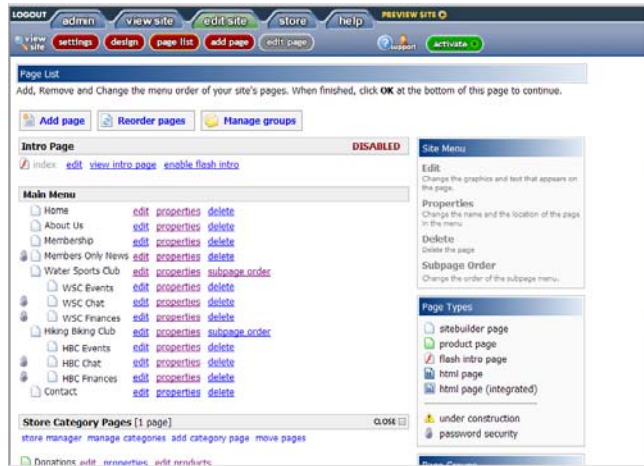
Set Security:

Once you click the properties link you go to the Page properties setting. When you click the 'Enable page security' checkbox and click the 'Apply Changes' button. You can then assign groups or assign users.
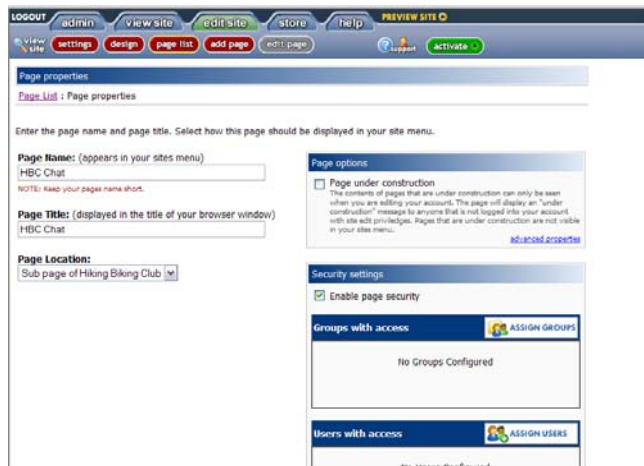
Assign Access Control Groups:

Once you click the 'Assign Groups' button you can choose the groups you want to be able to view the page content. In this case TWOC choose the Executive Board as the only group that can view the HBC Finances page.
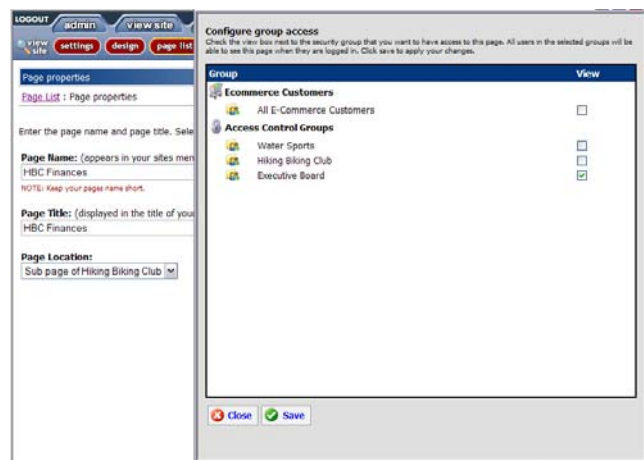
APPENDIX II: Account-based Mailing Lists

Account-based Mailing Lists allow your users to opt into any number of mailing lists when they are editing or creating their profile. Users can opt-out of mailing lists through their profile or by using the opt-out link on sent emails. Mailing lists send emails one-at-a-time to a long list of recipients and are used to send newsletters or other information to a large group of members.
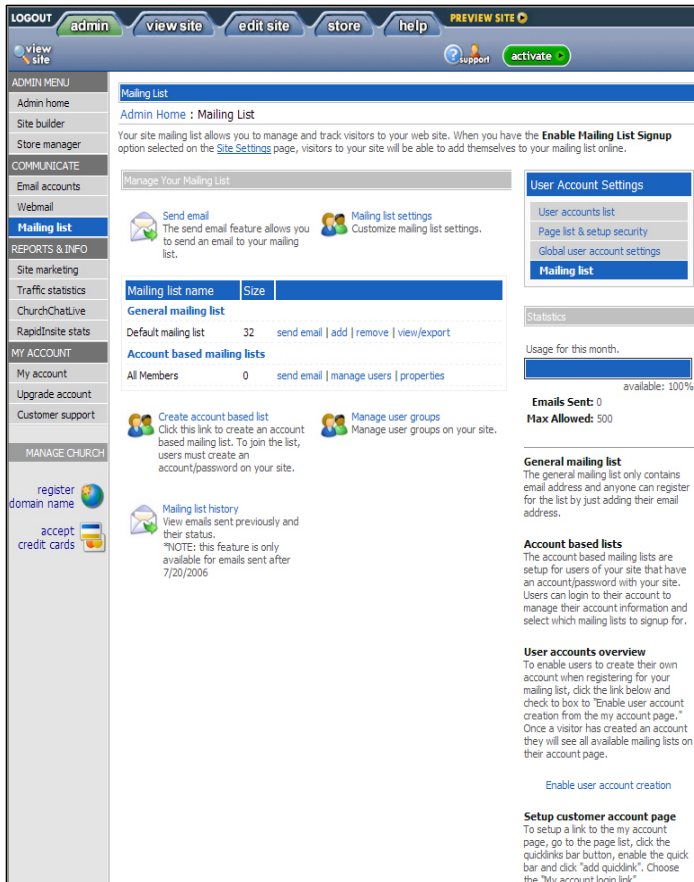
Please note that we adhere to the highest standards of anti-SPAM practices. If you repeatedly send unsolicited email you run the risk of having your website de-listed. You should not send anyone an email unless they have explicitly given you permission to do so - if in doubt, don't!

Mailing Lists Overview

Mailing lists are an essential communication capability for your members. This feature helps you collect and organize email addresses for people who opt-in to receive your email and it helps you set up and send email to your list.

With Account-Based emails you can create lists for different ministries or interest groups and users can opt-in to any of those lists. There is also the capability to send out email to the Default mailing list. The default mailing list does not require users to create an account but they also cannot opt-in / opt-out from that list through their profile. It is probably better not to enable both Account-based and Default Mailing Lists.

You reach your Mailing List console by clicking on the mailing list at the bottom of your Admin page for your website. Through you Mailing List console (see below) you can manage the following functions:

Create Account Based List - The account based mailing list allows you to select all or a specific category of user account or profiles and send email to that list that is dedicated to those user's needs.

Manage User Groups - User groups are groupings of user accounts or profiles. Typically the users are divided by a particular account history (all donors) or a particular interest (all youth group members). This function allows you to create new groups and to select users for those groups.

Mailing List History - Mailing list history shows the emails you have sent and allows you to review previous emails.

Mailing List Settings - Controls the registration message for the Default mailing list - not the Account Based Lists.

Enable User Account Creation - Allows users or visitors to your site to create accounts or profiles and to opt-in to your account based mailing

lists.

Send mail - Allows you to send email to your list in HTML and/or plain text using a ChurchSquare template or a template you saved.

Create Account Based List
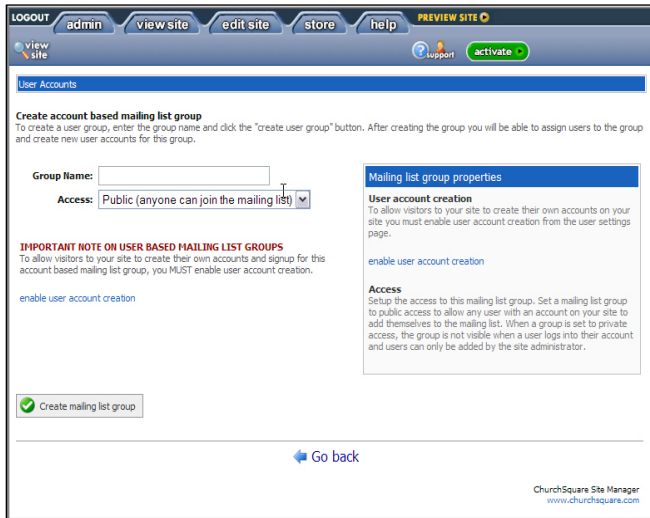
Clicking on the 'create account based list' link brings you to this screen. Type in the name of the list - make it descriptive but keep it short. Users will see this name if you make it Public and use it to determine whether they wish to opt-in to the list. Make sure your description clearly describes who this is intended for, for example not 'Youth Ministry' but 'High School Students' or 'Parents of High School Students'.

Next select whether you want the list to be Public or Private. If the list is Public then anyone with a profile will be able to opt-in to the list by editing their profile. If the list is Private you will manually have to move profiles into the list.

To save the settings click the 'Create mailing list group' button.

Manage User Groups
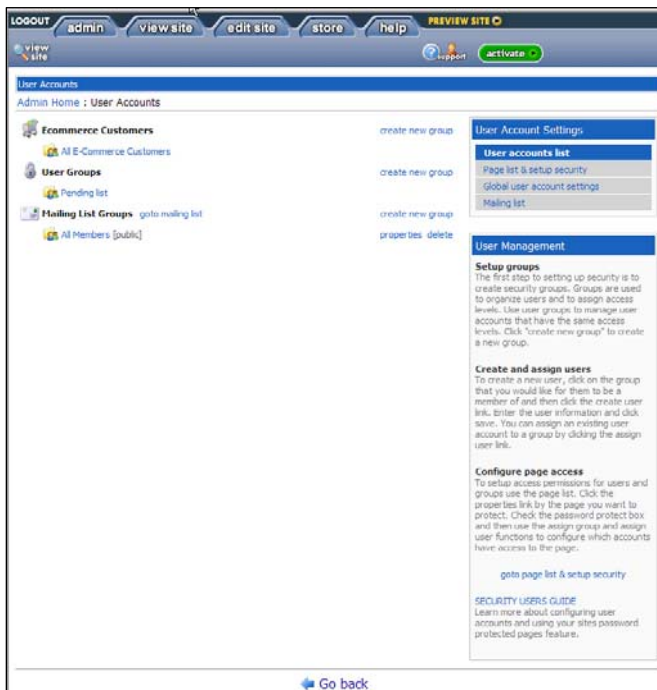
Clicking on the 'Manage User Groups' link brings you to this user accounts screen. This screen also allows you to create new groups (see above), delete groups you created, change the properties and create and assign users.

Clicking on the property link allows you to switch the mailing list group between being a public or private list.

Clicking on the list name allows you to assign, create or remove users. These tasks are straight forward; refer to the section on Adding in Profiles in the Member Directory guide for more detail.

You can use the Go back button to move back to the mailing list page or use the navigation links in the upper right corner of the page.

Mailing List History
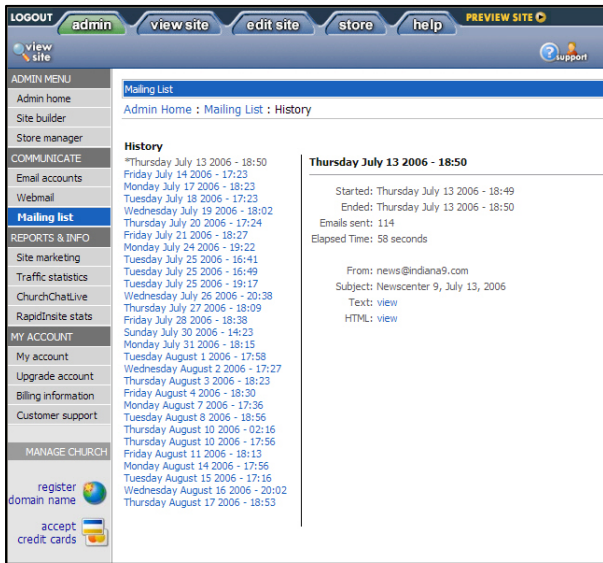
Clicking on the Mailing List History allows you to see the list of email you have sent. Clicking the date and time shows you the sending history, from mailbox and subject. Clicking the view links for the email allow you to see the email that was sent.

You can click on the left hand navigation list to leave this function.

Enable User Account Creation

If you enable user account creation users can create their own accounts. If you do not enable user account creation the site administer will have to create the account. (E-commerce plans have users accounts for e-commerce customers which are created during the checkout process. You can set the checkout process to ask the user if they wish to be included in the site default mailing list. Depending on the permission granted, these profiles can also be selected for mailing lists.) For further information see Enable User Account Creation in the Member Directory Guide.

Send Email
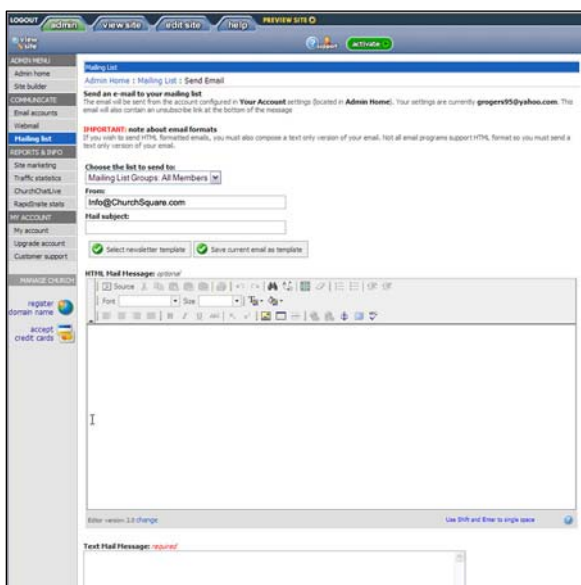
Clicking on the send email link next to the Mailing list name brings you to this screen. You will prepare you email and send it using these functions.

The 'Choose the list to send to' pull down gives you the chance to change the list you are sending to. You can also change the email box you are sending the email from - this will also be the reply email. The default 'from' email is the default account email for the site. (Note that when you send a test email it will send it to the default account email, not to the 'from' email if it is different. If you need to change the default email you can click on 'My Account' in the left hand navigation column.) Be sure to also include a subject with your email (including your organizational name usually results in more opened emails).

You can send out plain text email or HTML and plain text. It is best NOT to send just HTML email; many email readers only can interpret plain text emails and will not be able to read HTML email.

If you want to send just plain text, just type you message in the Text Mail Message. Test your email by sending a test message (test message go to the account default email). When you are satisfied you can cue your email message for sending by clicking the 'send message to mailing list' button.

Using HTML formatting to send email allows you to include graphics and pictures and links to other internet content or pages on your site. You use the HTML Mail Message box just like you would use the text component on your website. You can also use the template function.

Template Function

To use the template functions, click on the 'Select newsletter template' button and select the newsletter template or copy and paste your own template into the text box.

The template from the site uses the colors on your site and adds in your site title and address and contact information from your site. The template is a table and you can edit the information just like you would with a normal text component. If you are using Version 2.0 text editor, you can right click on the table to change table properties. In Version 1.0 you will need to place your cursor inside the table and click on the table icon in the box header.

You can also create your template from scratch or (if you are using the Version 2.0 text editor) paste in a template you created with Microsoft Word. Your MS Word template should not contain any pictures or images, they will not translate over, you will have to add the picture after you paste in the template. To paste in the template select the table in MS Word and click Control+C. Next click the paste MS Word icon (a little clipboard with a 'W') and a small translation window will pop-up. Use the Control+V keyboard shortcut to paste in your template and then click OK.

Saving and Sending Your Message

Once you have finished customizing your template click the 'Save current email as template' and give you template a name (no spaces or special characters). Your custom template will be available to you next time you send email.

Before you send your HTML email you need copy and paste your text to the text mail message box and format the text. When you are satisfied with both versions click on the 'send test email'. If you are satisfied you can send the message to your entire mailing list.

If you wish to save your email to finish later you can click the Save current email as template but this will only save your HTML mail message, not your text mail of any other settings.

Appendix III: Donation Subscription Management

Donations require an eStore account upgraded to handle subscriptions. Donations are similar to other eStore products with several important requirements:

- Periodic - recurring donations are charged repeatedly, typically weekly or monthly
- Arbitrary - the amount for the donation is not fixed, users can enter any amount for their donation
- Reviewable - users will want to review and cancel the donation subscription amount
- Reportable - users will want to see their donation history for end of year planning or tax purposes.

In order to accommodate these requirements ChurchSquare has built a complex set of features into the e-commerce function and the donation subscription product. These unique properties make the enhanced donation capability complex and site administrators should thoroughly understand the product before deciding to implement it on their site.

How it Works

Donations products are set up as subscription products in the ChurchSquare store. The donations have a subscriptions time period, for example, one-week, one-month or never (for one-time donations). The 'price' is usually set to 'donation based' which allows the user to enter any amount.

When a site user makes a donation they select the donation product for week, month, one-time or whatever time interval is offered. They enter an amount and proceed to their shopping cart and then checkout. In the checkout process they enter their payment method (credit or debit card) and create a login profile and complete the process. The credit or debit card is authorized (that is funds are available and allocated for this transaction). The store owner then edits the ChurchSquare site and enters the store to complete the order and this captures the funds (the money is actually ready to be transferred). The card will then be charged again (both authorized and captured) on the anniversary date. The card is charged until the subscription is terminated.

The website should offer a login area for donors. This login can be the same login used for page password protection or for the member directory. Once the user logins in and views their profile, they can see their donation history and they can cancel their donation subscription. To change the donation amount they would need to cancel their donation and start a new donation with a different amount.

Store owners can also login to the site and review the donation history for an individual and cancel a donation subscription. There are also reports on overall donation activity and downloadable reports for subscription products.

What You Need

In order to implement Enhanced Donation Capability you will need the following:

- An eStore enabled ChurchSquare website plan
- The subscription product upgrade. The subscription product upgrade is included in Multi-Ministry eStore Silver and Gold Plans.
- A merchant account (available through your bank or a 3rd party) that uses a ChurchSquare supported Payment Gateway. As of October 2006 the following Gateways are supported:
    - Authorize.net
    - BeanStream
    - Echo
    - EFTSecure

- o eProcessingNetwork.com
- o FastCharge
- o InternetSecure
- o iTransact
- o LinkPoint
- o Network Merchants
- o PayPal Payments Pro
- o Plug'nPay
- o PRI Merchants
- o Processing.net
- o Protx-VSP Direct
- o SecPay
- o Skipjack
- o USA ePay
- o Verisign Pay Flow Pro
- o ViaKlix
- At least one donation product set up in the Store and accessible on the website
- A login area so users can access their user accounts.

Setting Up Donation Products

To set up the Enhanced Donation Capability you first need to set your ChurchSquare plan to include an eStore with the subscription upgrade. Set up your store by referring to the instructions on your website. It is advisable to review the settings for each of the items in the Store Settings list.

You will need to set up your Payment Gateway by clicking on the Store Settings Payment/gateway link and selecting the payment types and payment gateway. The payment gateway settings are available from your merchant account provider.

Payment types for donations can only be a credit or debit card. You cannot pay for a donation with a check, money order, PayPal Standard or any of the other payment types. You can enable these payment types if you want to use them for payment for other store products but they will not work with periodic subscriptions.

Enter Donation Product Category - Click on the Setup Products link to begin the product setup process and click on the "Add page/category" button. Enter a suitable Category name such as "Donations". Keep the location as a "Top level product category". You can also enter a description if you wish. Things you might include in the description include your tax exempt status, that users can select their donation period (week, month, one-time, etc.) and that users can enter any amount for their donation. Be sure to mention that only credit and debit cards are acceptable payment types. For the rest of the variables the default settings are likely applicable.

Enter Donation Products - On the Products Home page click on the "add/edit products" link to add a new donation product and then click on the add subscription link. Use the pull-down list to select the recurrence interval: never (one-time donation), daily, weekly, monthly, quarterly, semi-annually or annually. A separate product must be set up for each recurrence interval. The most typical are never, weekly and monthly. Yearly is atypical as that is more conveniently done as a one-time donation but quarterly may be another option to consider. For donations you will not use the "Start billing after x days" or "Recurring subscription fee"; skip those boxes. (Some organizations may have special campaigns where you donate say $100 per month for a certain level of membership or recognition - in this case you would enter 100 in the Recurring subscription fee box). Check the "Donation based" box to indicate that the donor can enter any amount.

Enter a product name like Monthly Recurring Donation and a product ID. The product ID is for internal records so it might be a product number set up in your accounting system.

Enter a short description if you wish to. For donation you normally do not enter a long description but may wish to if this donation is for a special program or recognition (i.e., Gold Membership Donation).

Donations typically do not have a setup fee so leave that area blank. Enter zero in weight and uncheck the taxable box.

The product options allow you to collect additional information or designate the donation for a specific purpose. (Don't collect standard name and contact information as that is collected in the check out process.) Click the "Add Option" button for a description of the types of input fields available. This information will appear on your sales order.

Typically the other defaults are applicable so click "Apply Changes" to save your product.

Setting up Your Website for Donations

Your website requires two things to be set up, a place to login to the user account and a place to select the donation. If you presently have implemented page security or a member directory (the new October 2006 member directory), you likely already have a user account login. If not, you will need to add it to your site. You can add the login to any page just like any other component. Account login is a component under Interactive or under eCommerce in the Add Component menu.

You have two options to expose the donation subscription products on the website. You can either move the donation category page into the menu structure or add the donation products to any page. To move the category page to the menu structure, go to the page list (page manager from the admin page) and scroll down to the Store Category Pages. Click on the "Properties" link for the donation page and use the pull down list under "Page Location" to select the menu location.

To add a donation product to any page, go to that page and edit the page. Click on the add button and select "Ecommerce" and then "product category" or "single product item". Then select the appropriate category or item.

Congratulations, that completes your setup for donations! We suggest you test your system by completing a test donation.

Other Considerations

When a Donation Occurs - when a donation occurs a copy of the sales order will be sent to the default email on the site (see My Account from the site Admin page - this can be overridden in the Store Settings). When the email is received the store owner should login to the site and go to the store and review the new order. If there are no problems with the order you can complete the order (capturing the funds) by checking the box on the order line and clicking the Complete Order button. The order is now complete and set up to recur automatically.

Canceling a Donation Subscription - as previously mentioned a user can login to their account and click on the Subscriptions button and then view or cancel the subscription. To cancel a subscription as the site owner, login to the site and click on user accounts from the Admin page and then on the appropriate account list under subscriptions. Find the donor and click on the account details link. Click on subscriptions and then click on Cancel Subscriptions.

Changing a Donation Subscription - you cannot change a donation. To change the amount of a donation or a payment method, you have to delete the donation subscription and add a new donation subscription.

Reporting - there are several reporting resources on your site. If you login and go to your store you can click on the Subscription Manager. This allows you to set a time period and then select a transaction report or an expiration report. The expiration report allows you to review subscriptions or donations that have expired either because they were cancelled or because the payment did not clear through the credit or debit card. Often this is due to a change in the card number or expiration date. It is worthwhile to review this report at least monthly and follow up with customers whose payment method is no longer valid.

There are also reports available through the eCommerce Reports link through the Store Home page. Information can also be downloaded and exported using the import/export link and the Export to QuickBooks.