ONLINE GIVING *with* WESHARE

Introduction to Your New Admin Dashboard

BECAUSE VIBRANT CHURCHES MATTER

INTRODUCTION TO YOUR NEW

WeShare Admin Dashboard

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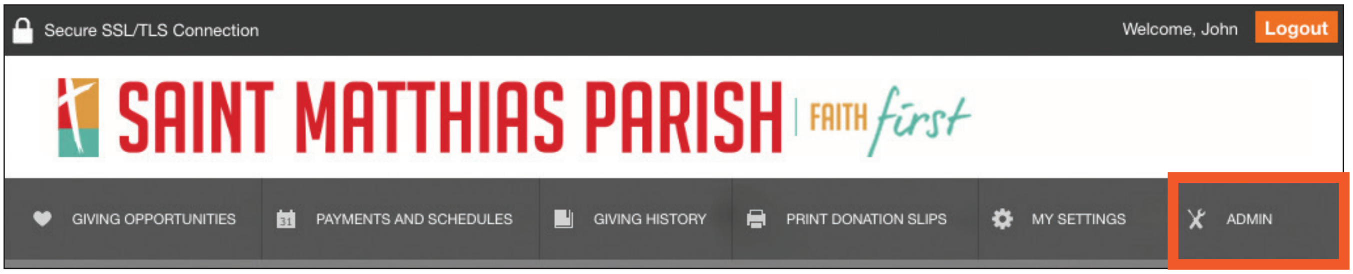
LOGGING INTO YOUR ACCOUNT

There are two ways to access your account:

Option 1:

1. Go to your site by using your WeShare URL.
2. Log in and click on the "Admin" button located on the right of the menu bar. The new WeShare admin dashboard will appear.

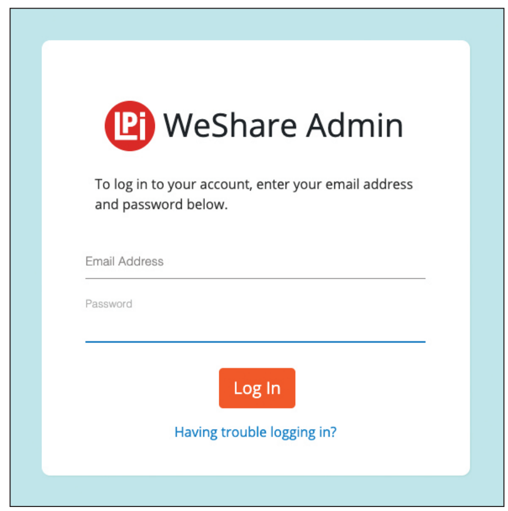


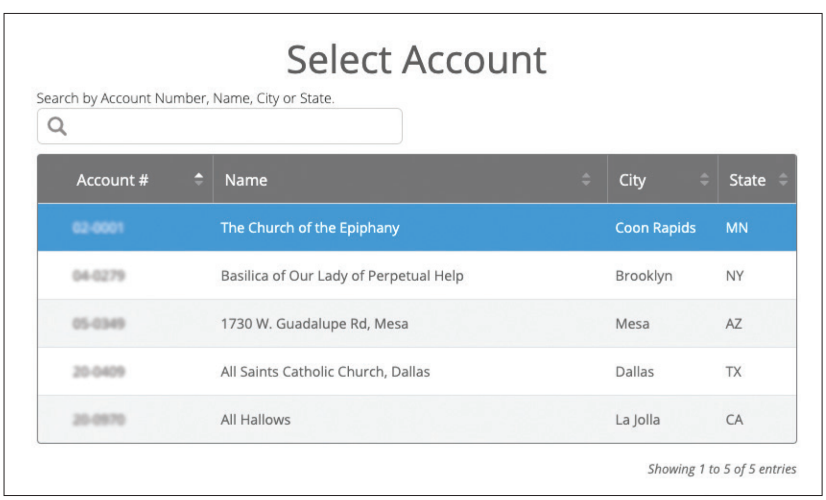
Option 2:

If you are an Admin of multiple accounts, view all accounts:

1. Enter or paste the following URL into a browser's address bar: https://manage.weshareonline.org. The WeShare admin login page will appear.
2. Enter your WeShare email address and password.
3. Click the "Log In" button. The Select Account page will appear.

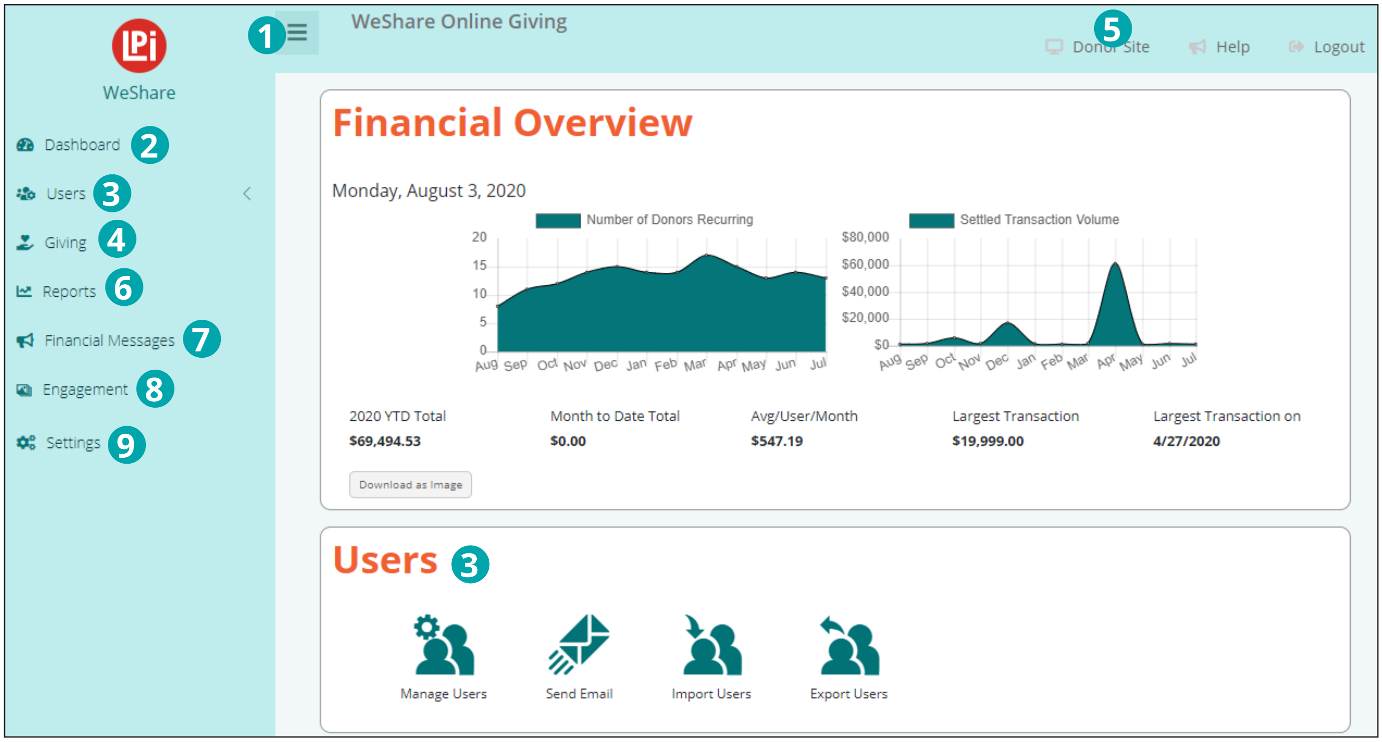
Note: If you do not know your email address and/or password, click on the "Having trouble logging in?" link. Instructions will appear directing you to go to your organization's site and reset your password.





4. The Select Account page will only display accounts that you have Admin authorization for. Choose the account you would like to view and double click anywhere on the highlighted line.

Note: You can also search accounts by entering a partial Account Number, Name, City, or State.



NEW DASHBOARD

1 Hamburger Menu
This allows you to expand or contract the size of your viewing screen.

2 Dashboard
This brings you back to the main Dashboard page.

3 Users
This will take you to “Manage Users,” “Send Email,” “Import Users,” and “Export Users.”

4 Giving
Here you can create and manage your collections, second collections, and events.

5 Donor Site
This will take you to the donor side of your site.

6 Reports
To pull activity data for Giving Opportunities and donors.

7 Financial Messages
Status messages received from the bank or credit card company.

8 Engagement
A library of resources and materials.

9 Settings
General site settings.

FINANCIAL OVERVIEW

The Financial Overview provides a year or 12-month analysis.

YTD Total: Total donations for current year.

Month to Date Total: Total donations for current month.

Avg./User/Month: Based on a 12-month period. *(This used to be a rolling 13 months.)*

Largest Transaction: Largest donation received for current year.

Largest Transaction on (Date): Date that largest donation was received.
Note: The Largest Transaction reports on the largest donation within a 12-month period. In the orginal Financial Overview, this transaction was based on the largest transation since launching your site. If comparing the old and new site, this will be different.

USERS

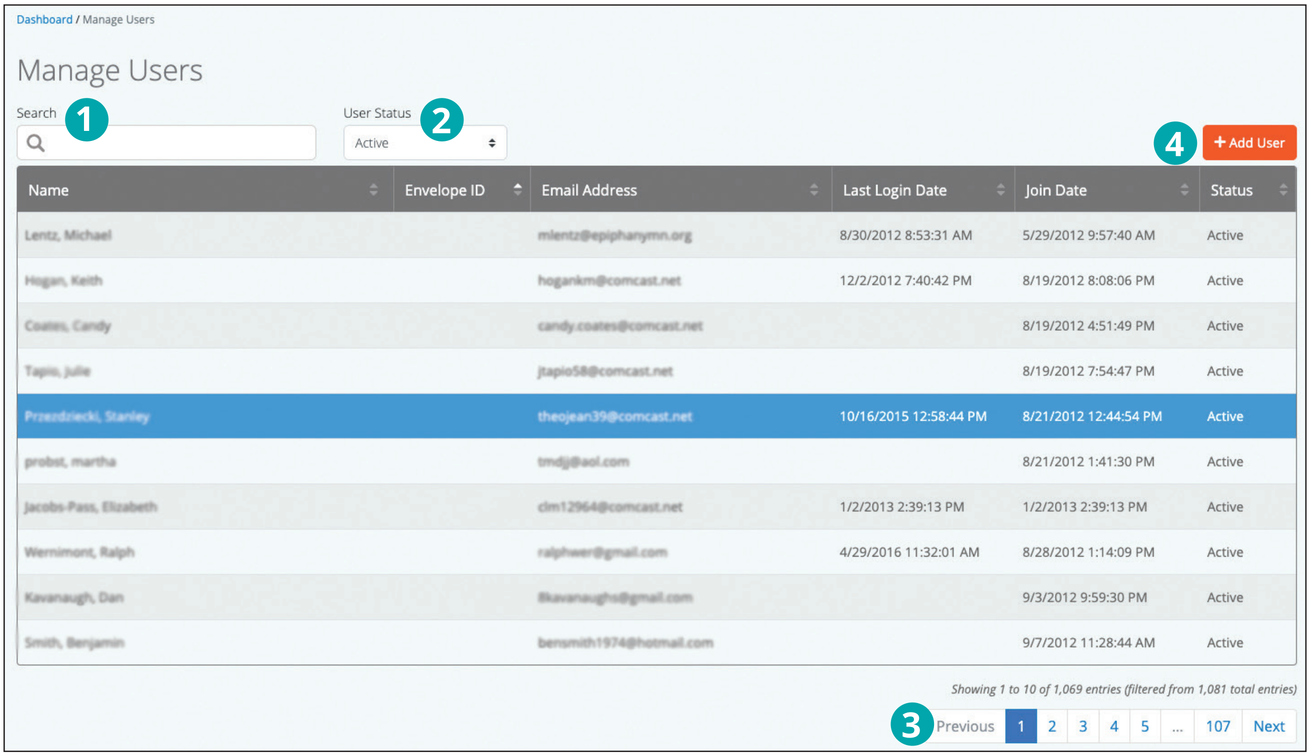
Click on any icons to be taken to different sections of your site. You can also click on “Users” located on the left side panel.

Manage Users: Your member management section. *(More details on the next page)*

Send Email: Group emails for your active donors. *(No functionality changes)*

Import Users: The ability to import your church parishioner list. *(No functionality changes)*

Export Users: The ability to export your online giving donor list. *(No functionality changes)*



Manage Users

You can add, edit, and remove your donors in this section.

1. **Search:** Allows you to search for a user by entering either first/last name, envelope ID, email address, last log in date, join date, or user status.

2. **User Status:** Filter your user list to view only active, removed, or all.

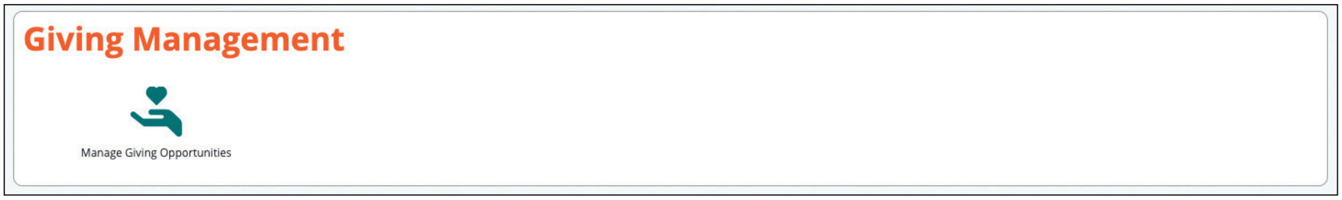
3. **Pagination:** Located at the bottom right of the screen. This new feature allows you to view a smaller section of users and is less taxing on the system.

4. **Add User:** Add a new donor to your online giving site.

    - Click on the "Add User" button. You will be taken to a contact info page.
    - Fill out the open field boxes. Some fields are required, and others are still optional.

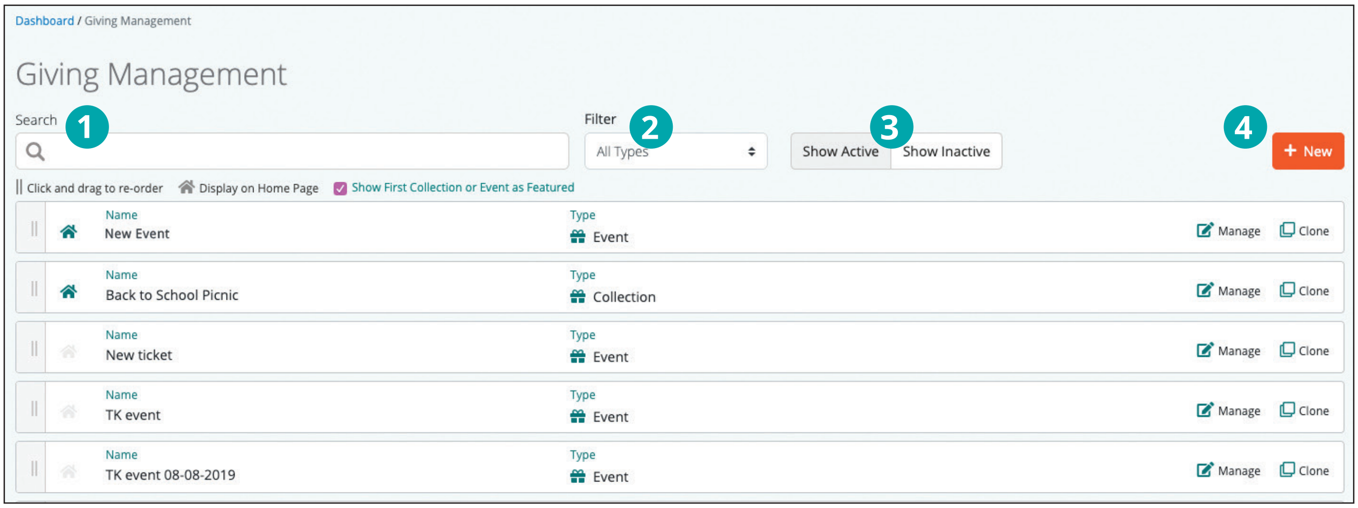
    Note: New fields are now available in this section: Contact Information, Envelope ID, Transaction Email Notifications, and User Notes.

    - Once setup is complete, click "Save Changes."



GIVING MANAGEMENT

To build, edit, and clone collections, second collections, and events.



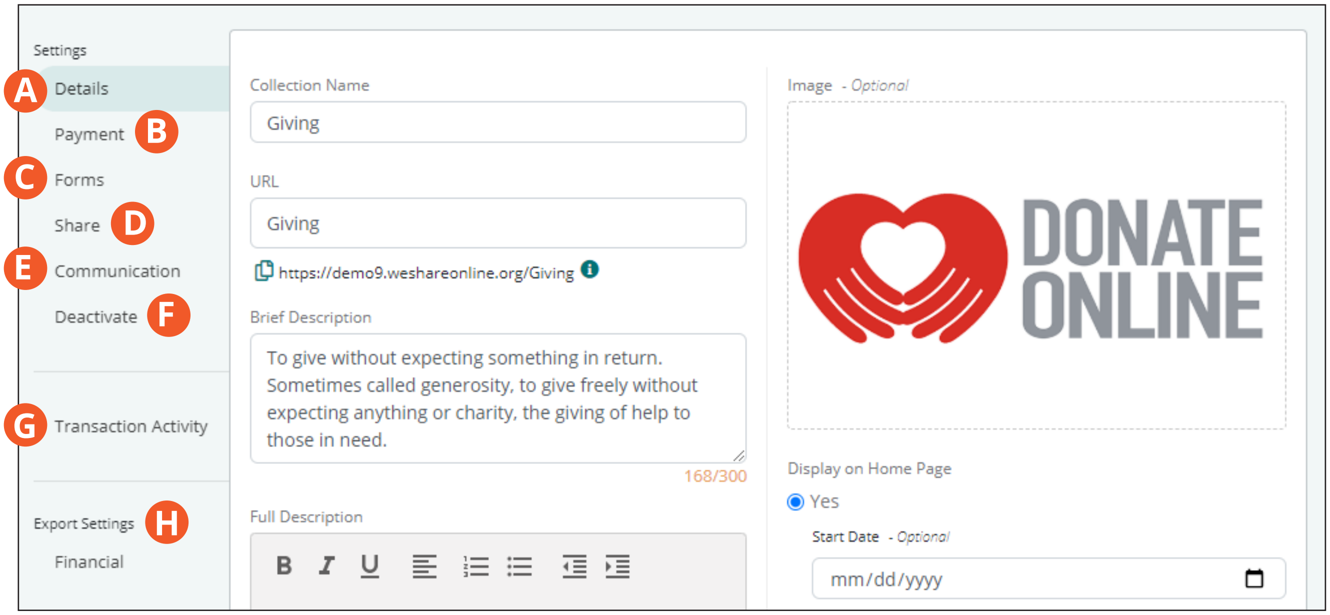
1 **Search:** By Name or Type of build opportunity.

2 **Filter:** By all types, collections only, events, or second collections only.

Note: All opportunities are now in the same section.

3 **Show Active/Show Inactive:** Use toggle to filter between active and inactive opportunities.

4 **New:** Clicking on the “New” button will bring up the option to build a collection, second collection, or event.



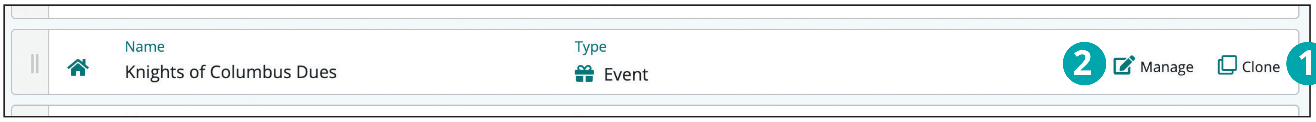
Collections

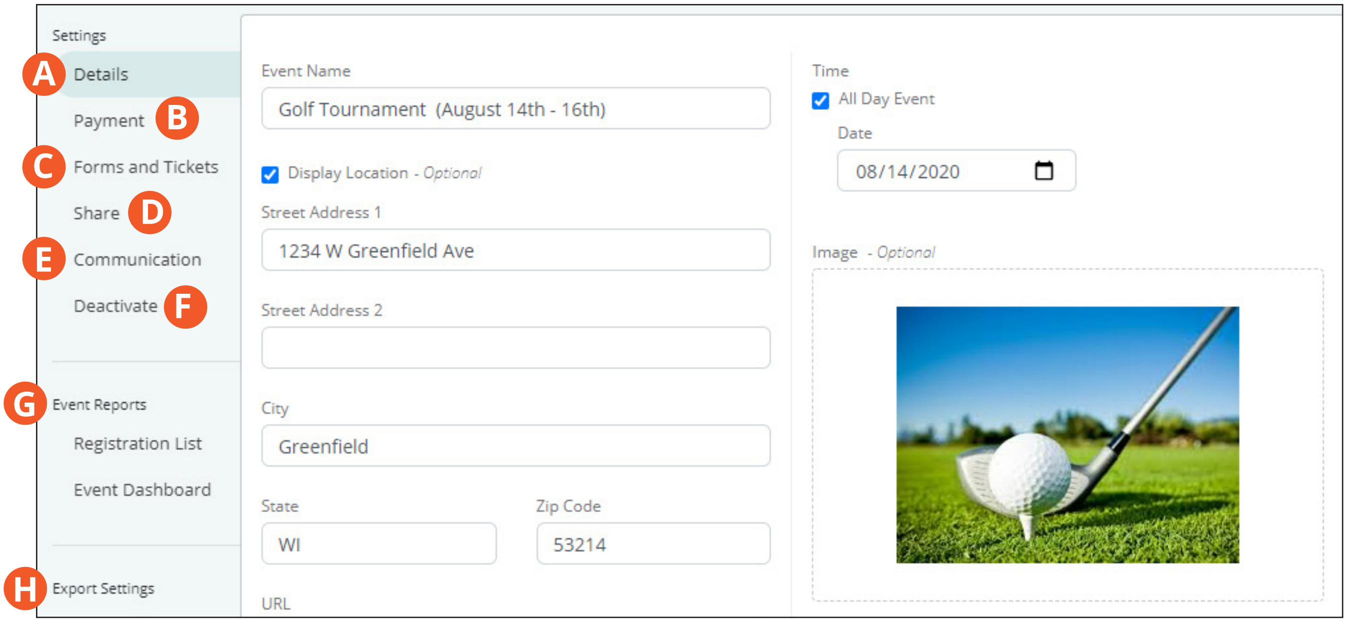
1 **Clone Button:** You can clone from the Giving Management page or within the opportunity itself. A date will populate in the name and URL field box. Any edits you make to the name will also need to be made within the URL. Click “Save Changes” when finished.

2 **Manage Button:** Shows the detailed page for that opportunity.

- A **Details:** Allows you to change the opportunity name, collection description, and image.
- B **Payment:** Same setup options available. Recurring and one-time setups are on the same page.
- C **Forms:** Same setup fields, but with a new look and a click-and-drag feature.
- D **Share:** The new name we use for the **WeShare Embed Widget Code.** It may have a new name, but the functionality works the same. Copy the code and add it to any page on your site to showcase your opportunity. The right side of the screen shows what it will look like.
- E **Communication:** Same setup options. Add your name, email address, and opportunity managers.
- F **Deactivate:** Formerly known as **Disable Collection.** It has a new name but the same functionality. Clicking the deactivation button will cancel all future scheduled recurring transactions.

  Note: If there are any scheduled recurring transactions connected to this collection, you will see a list of all future transactions that will be cancelled to the right of this message. You are able to reactivate this collection at a later date, but you will not be able to restore any previous scheduled transactions.
- G **Transaction Activity:** Transaction & Summary Report.
- H **Export Settings:** Fund Number set up in this location for reporting purposes.





Events

1 **Clone Button:** You can clone from the Giving Management page or within the opportunity itself. A date will populate in the name and URL field box. Any edits you make to the name will also need to be made within the URL. Click "Save Changes" when finished.

2 **Manage Button:** Shows the detailed page for that opportunity.

A **Details:** Allows you to change the opportunity name, event description, and image.

B **Payment:** Same setup options available. Recurring and one-time setups are on the same page.

C **Forms and Tickets:** Same setup fields, but with a new look and a click-and-drag feature. What used to be known as Guest Types is now called Tickets.

D **Share:** The new name we use for the **WeShare Embed Widget Code.** It may have a new name, but the functionality works the same. Copy the code and add it to any page on your site to showcase your opportunity. The right side of the screen shows what it will look like.

E **Communication:** Same setup options. Add your name, email address, and opportunity managers.

F **Deactivate:** Formerly known as **Disable Event.** It has a new name but the same functionality. Clicking the deactivation button will cancel all future scheduled recurring transactions.

Note: If there are any scheduled recurring transactions connected to this event, you will see a list of all future transactions that will be cancelled to the right of this message. You are able to reactivate this event at a later date, but you will not be able to restore any previous scheduled transactions.

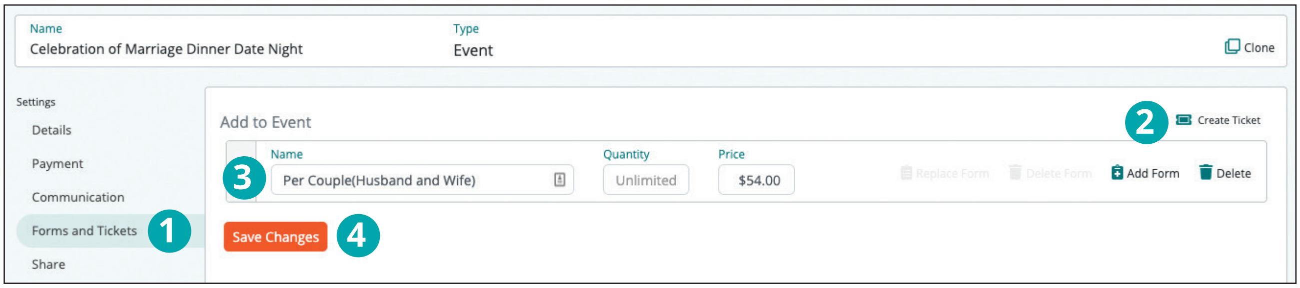
G **Event Reports:** Click on **Registration List** to see, edit, and print out a list of those who have signed up. Administrators can choose to export the list as a CSV or in a PDF format. Click on **Event Dashboard** to get a summary view of your registration list.

H **Export Settings:** Exporting set up in this location for reporting purposes.

Creating a Ticket

1. Click on Forms and Tickets.
2. Click "Create Ticket" in the upper right corner.

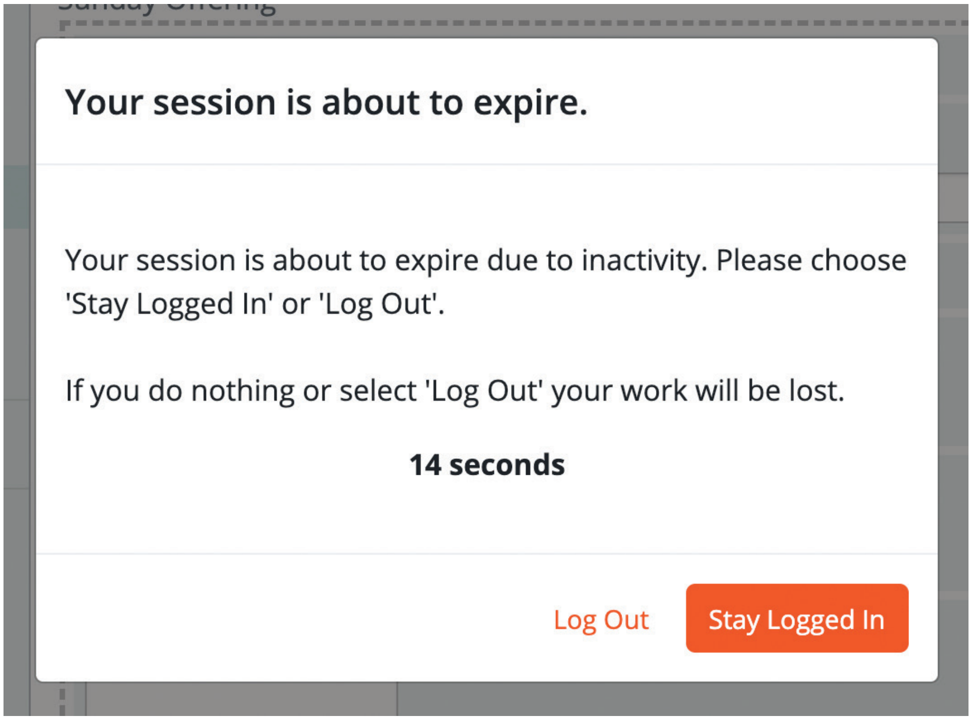
   Note: You have the option to choose "paid" or "free" from the drop-down menu.
3. The name, quantity, and price boxes appear. Click inside each box to edit. (Both the name and the price boxes are required.)
4. Click "Save Changes."



SESSION TIME-OUT

If your site sits idle for 15 minutes, a notice that your session is about to expire due to inactivity will appear. You will have 2 minutes from the initial pop-up to click on the screen and keep it active; otherwise, you will be logged out.

Note: As long as you are active within the site, you will remain logged in and active.



REPORTS

Integrated reporting and forecasting that allows you to pull transaction data for active Giving Opportunities.

Transfer Reports:

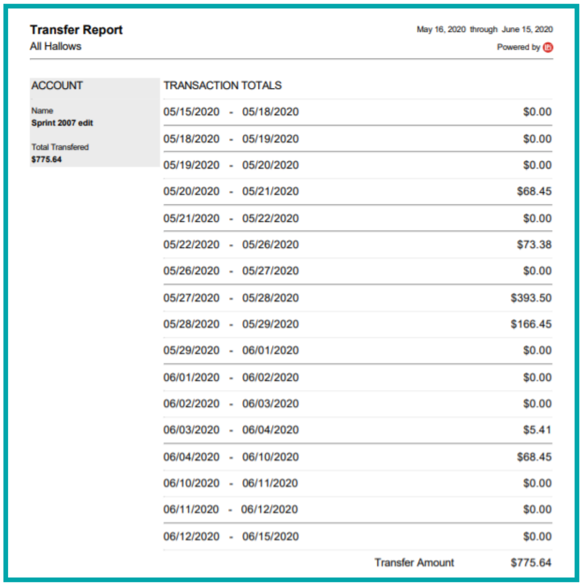
Every time money is deposited into any of your bank accounts, WeShare will produce a set of reports to help you keep track of your net donations. Just select a desired date range. Here are the three basic types.

1. **Summary:** The Summary PDF is a very basic breakdown of the amount of donations or payments taken in. The top of the page lists the net amount, which will match what was deposited in your account.

   You will then see a breakdown of each collection or event showing how many ACH and Credit Card donations were taken in as well as the total amount of fees assessed.

2. **Detailed:** The Detailed PDF looks very similar to the Summary PDF, but it contains more detailed and important information regarding donors and donations.

   You will clearly see exactly who donated, how much each donation was for, and what time and day the donations were made. You will also see an exact breakdown of fees. This report is what most churches use to reconcile their net donation amounts.

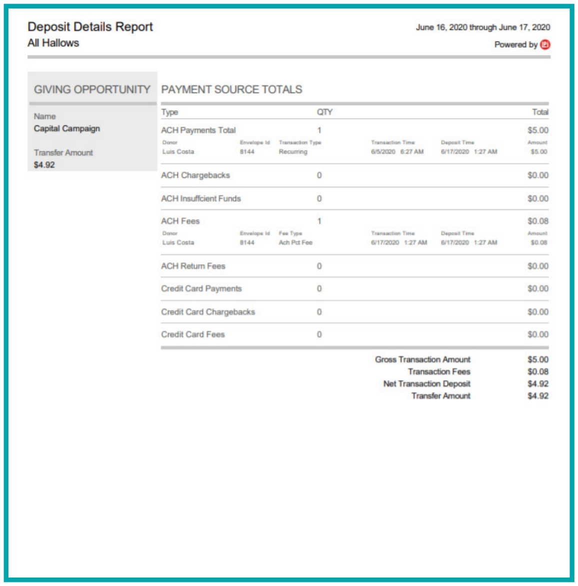


Transfer Report — All Hallows — May 16, 2020 through June 15, 2020 — Powered by

ACCOUNT — Name: **Sprint 2007 edit** — Total Transfered: **$775.64**

TRANSACTION TOTALS	
05/15/2020 - 05/18/2020	$0.00
05/18/2020 - 05/19/2020	$0.00
05/19/2020 - 05/20/2020	$0.00
05/20/2020 - 05/21/2020	$68.45
05/21/2020 - 05/22/2020	$0.00
05/22/2020 - 05/26/2020	$73.38
05/26/2020 - 05/27/2020	$0.00
05/27/2020 - 05/28/2020	$393.50
05/28/2020 - 05/29/2020	$166.45
05/29/2020 - 06/01/2020	$0.00
06/01/2020 - 06/02/2020	$0.00
06/02/2020 - 06/03/2020	$0.00
06/03/2020 - 06/04/2020	$5.41
06/04/2020 - 06/10/2020	$68.45
06/10/2020 - 06/11/2020	$0.00
06/11/2020 - 06/12/2020	$0.00
06/12/2020 - 06/15/2020	$0.00
Transfer Amount	$775.64

New Page Layout!



Deposit Details Report — All Hallows — June 16, 2020 through June 17, 2020 — Powered by

GIVING OPPORTUNITY — Name: Capital Campaign — Transfer Amount: $4.92

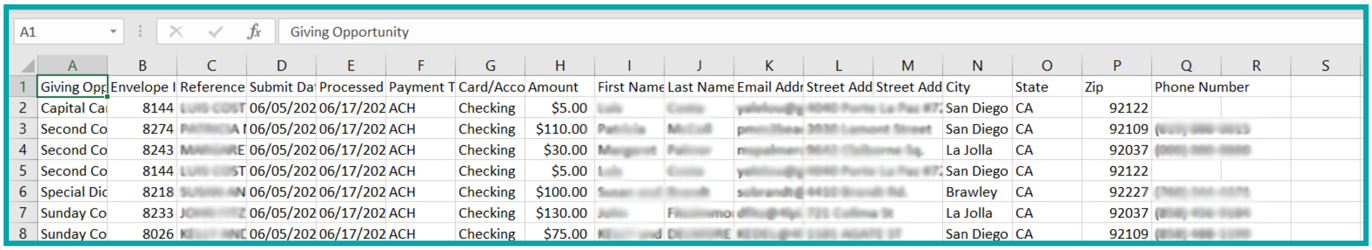
PAYMENT SOURCE TOTALS

Type	QTY	Total
ACH Payments Total	1	$5.00
Donor: Luis Costa; Envelope Id: 8144; Transaction Type: Recurring; Transaction Time: 6/5/2020 6:27 AM; Deposit Time: 6/17/2020 1:27 AM; Amount: $5.00		
ACH Chargebacks	0	$0.00
ACH Insuffcient Funds	0	$0.00
ACH Fees	1	$0.08
Donor: Luis Costa; Envelope Id: 8144; Fee Type: Ach Pct Fee; Transaction Time: 6/17/2020 1:27 AM; Deposit Time: 6/17/2020 1:27 AM; Amount: $0.08		
ACH Return Fees	0	$0.00
Credit Card Payments	0	$0.00
Credit Card Chargebacks	0	$0.00
Credit Card Fees	0	$0.00
Gross Transaction Amount		$5.00
Transaction Fees		$0.08
Net Transaction Deposit		$4.92
Transfer Amount		$4.92

3. **WeShare Export CMS or CSV Format*:** These reports reflect the gross amount of donations taken in so you can properly credit your donors for supporting your church. If you use a supported church management software program, you will be able to download this report from WeShare to your desktop and then upload it into your system. This will save you countless hours of data entry.

   If your software program is not yet supported, you can use the WeShare CSV Export Format option offered in the Setting section of the site. This report will provide the information necessary for you to manually enter donations into your system.

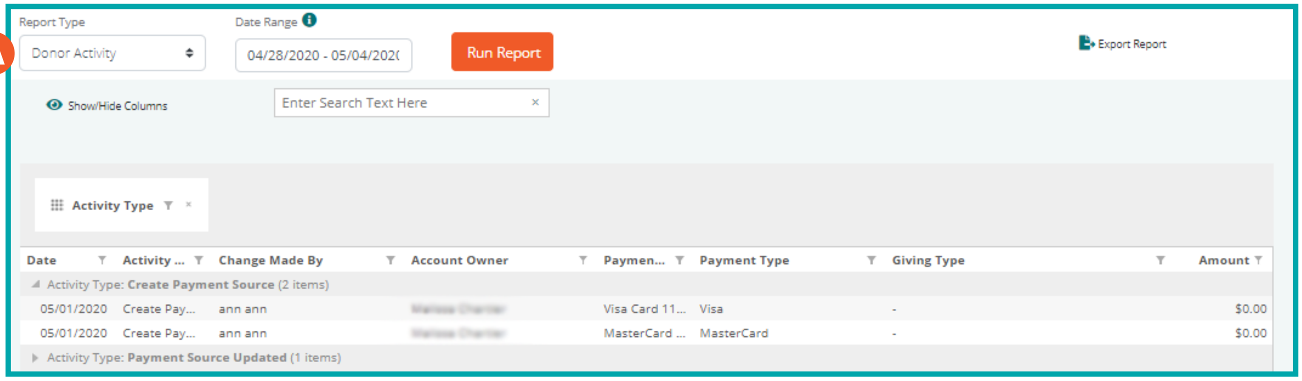
**Depending on which option you choose within Settings.*



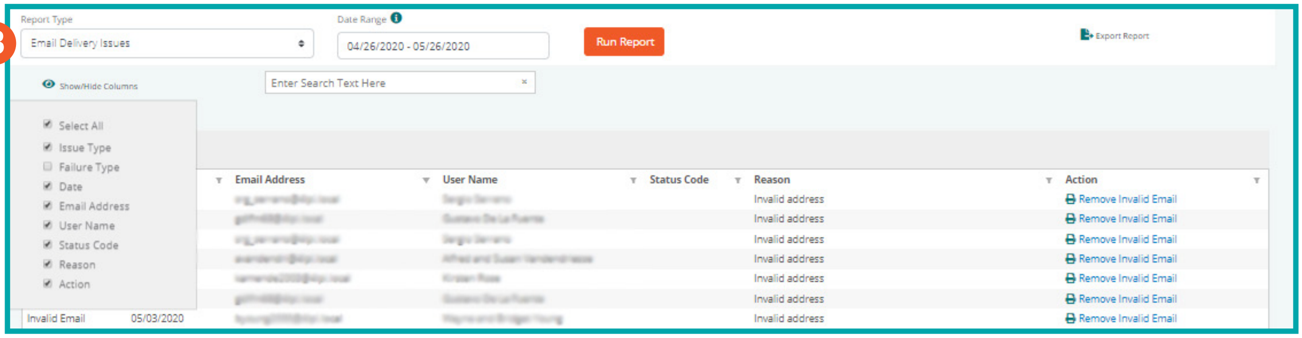
A1 — Giving Opportunity

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Giving Opp	Envelope I	Reference	Submit Da	Processed	Payment T	Card/Acco	Amount	First Name	Last Name	Email Addr	Street Add	Street Add	City	State	Zip	Phone Number
2	Capital Ca	8144	[illegible]	06/05/202	06/17/202	ACH	Checking	$5.00	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	San Diego	CA	92122	
3	Second Co	8274	[illegible]	06/05/202	06/17/202	ACH	Checking	$110.00	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	San Diego	CA	92109	[illegible]
4	Second Co	8243	[illegible]	06/05/202	06/17/202	ACH	Checking	$30.00	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	La Jolla	CA	92037	[illegible]
5	Second Co	8144	[illegible]	06/05/202	06/17/202	ACH	Checking	$5.00	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	San Diego	CA	92122	
6	Special Dic	8218	[illegible]	06/05/202	06/17/202	ACH	Checking	$100.00	[illegible]	[illegible]	[illegible]	[illegible]		Brawley	CA	92227	[illegible]
7	Sunday Co	8233	[illegible]	06/05/202	06/17/202	ACH	Checking	$130.00	[illegible]	[illegible]	[illegible]	[illegible]		La Jolla	CA	92037	[illegible]
8	Sunday Co	8026	[illegible]	06/05/202	06/17/202	ACH	Checking	$75.00	[illegible]	[illegible]	[illegible]	[illegible]		San Diego	CA	92109	[illegible]

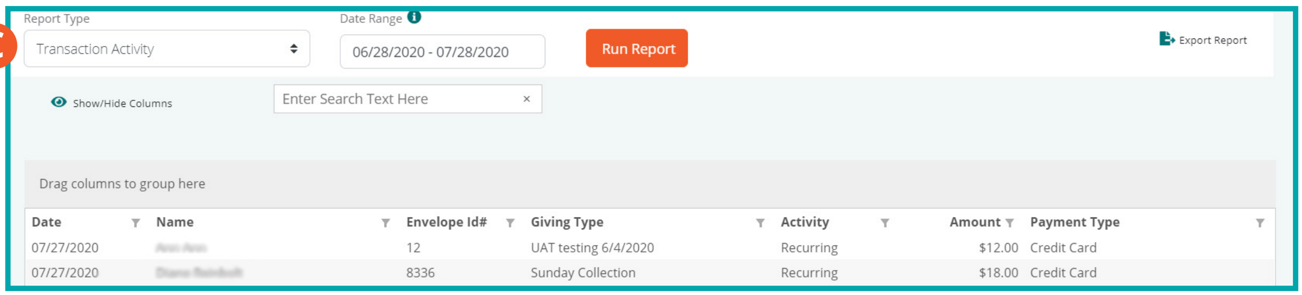
A



B



C



A Donor Activity: A global report that provides insight on changes made to a donor's account for the time period chosen. This includes different formations like the type of activity, whom the changes were made by and to whose account. Enter your desired date range and click Run Report.

B Email Delivery Issues: WeShare routinely sends out email receipts and notifications to donors. This report allows you to see whether any of those emails are having trouble being delivered. Enter in a date range and click Run Report.

C Transaction Activity: A global report that displays a full list of every gross donation amount for selected date range. Adjust the range at the top and Run Report to view weekly, monthly, or yearly activity for the site.

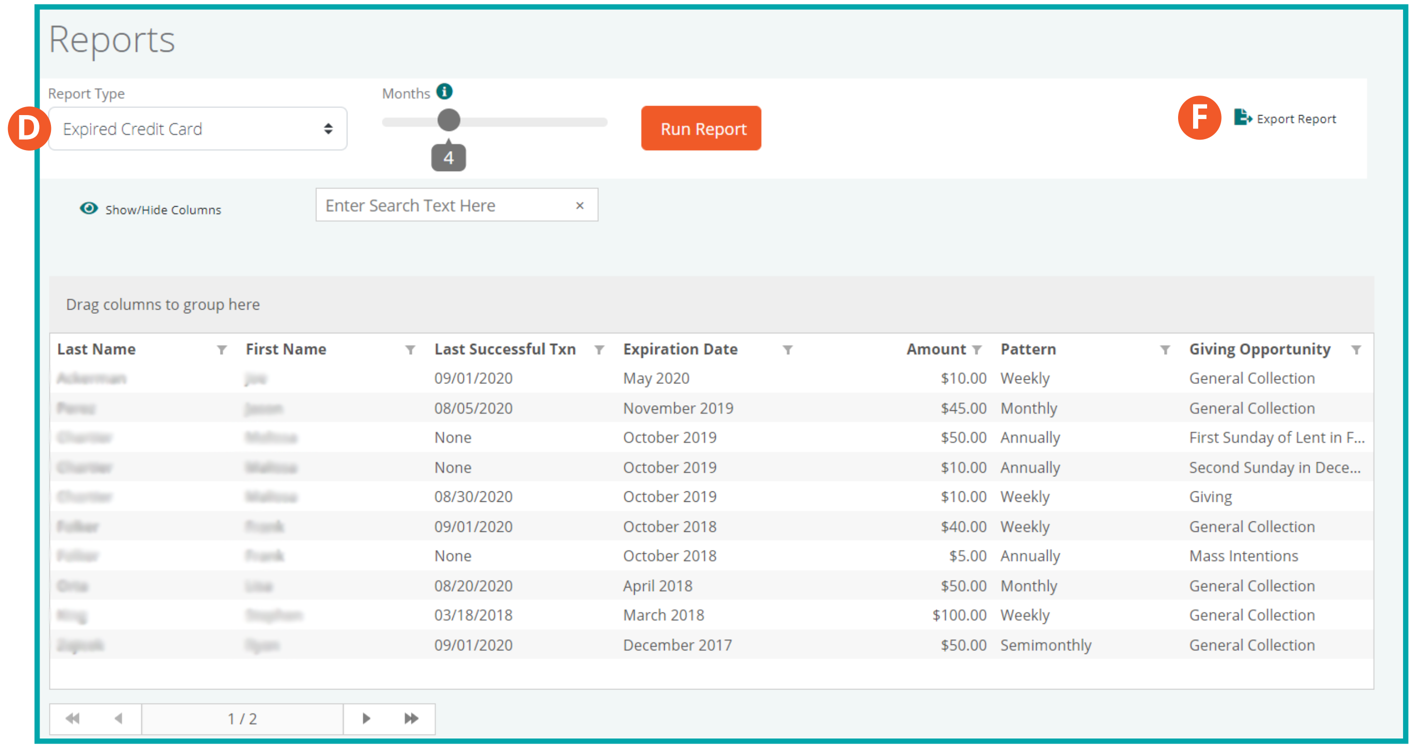
Note: If you are not looking for a global report, a Transaction Activity report can also be pulled within the giving opportunity and NOW you can also find a Transaction Activity report for Second Collections.

D Expired Credit Card: This report provides a list of Credit Cards for active recurrences where the Credit Card has expired or is expiring at the end of the selected month. Choose how many months to view and Run Report! Make sure to check out some of the filtering options before exporting.

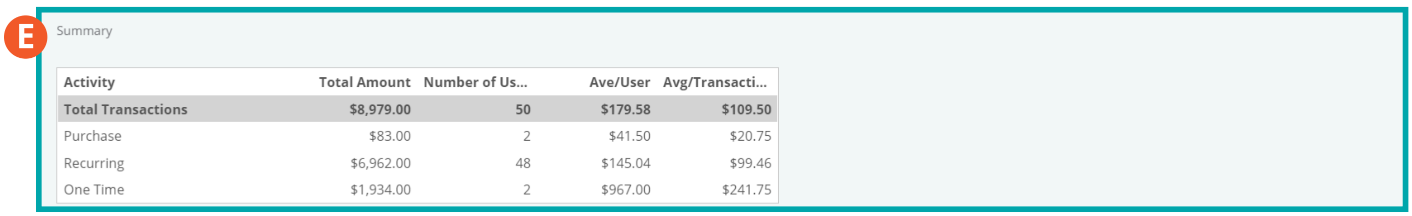
E Summary: This information provides the total amount of transactions for this time period, donation averages, and the number of recurring donors to this collection. This information can be used to analyze giving trends and project donation totals, but it should never be used as an accounting or reporting tool.

Note: Transactions can take between 5–7 business days to get from a donor's account into your church's bank. Because of this, transactions might appear here that have not yet posted — don't worry, they're on the way.

F Export Report: Click here to view report information in an xlsx spreadsheet.



Last Name	First Name	Last Successful Txn	Expiration Date	Amount	Pattern	Giving Opportunity
[illegible]	[illegible]	09/01/2020	May 2020	$10.00	Weekly	General Collection
[illegible]	[illegible]	08/05/2020	November 2019	$45.00	Monthly	General Collection
[illegible]	[illegible]	None	October 2019	$50.00	Annually	First Sunday of Lent in F...
[illegible]	[illegible]	None	October 2019	$10.00	Annually	Second Sunday in Dece...
[illegible]	[illegible]	08/30/2020	October 2019	$10.00	Weekly	Giving
[illegible]	[illegible]	09/01/2020	October 2018	$40.00	Weekly	General Collection
[illegible]	[illegible]	None	October 2018	$5.00	Annually	Mass Intentions
[illegible]	[illegible]	08/20/2020	April 2018	$50.00	Monthly	General Collection
[illegible]	[illegible]	03/18/2018	March 2018	$100.00	Weekly	General Collection
[illegible]	[illegible]	09/01/2020	December 2017	$50.00	Semimonthly	General Collection



Activity	Total Amount	Number of Us...	Ave/User	Avg/Transacti...
Total Transactions	**$8,979.00**	**50**	**$179.58**	**$109.50**
Purchase	$83.00	2	$41.50	$20.75
Recurring	$6,962.00	48	$145.04	$99.46
One Time	$1,934.00	2	$967.00	$241.75

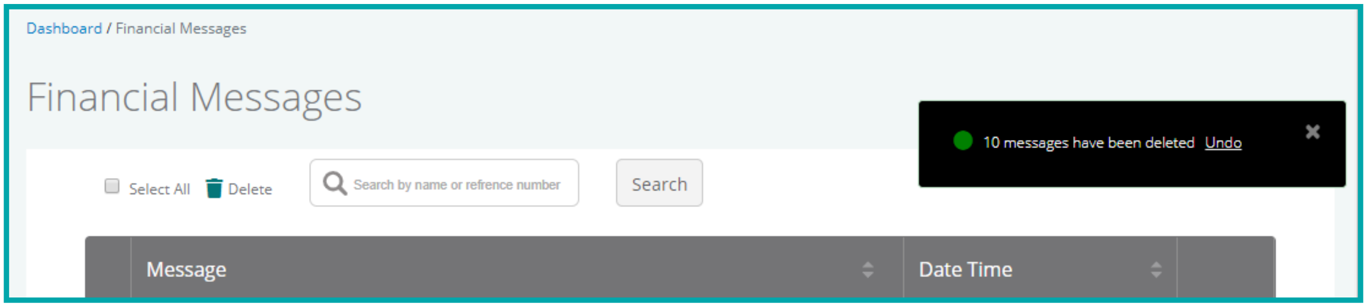
Key Words:

Activity Column	Different types of available activities
Total Amount Column	Different transaction totals for each displayed activity
Number of Users	Total number of users
Ave/User Column	Average transaction amount per user
Avg/Transaction Column	Average transaction amount per activity
Total Transactions	Total amount of transactions for all activities
Purchase	Total transaction amount for active Events
Recurring	Total recurring transaction amount for active Collections
One Time	Total one time transaction amount for active Collections
Donation	New feature! Total recurring transactions for active Second Collections
Payment	New feature! Total payments for Collections with payment flag set

FINANCIAL MESSAGES

Every time a donation is declined for reasons such as an expired credit card or insufficient funds, WeShare will automatically do three things:

1. An email will be sent to the donor explaining that the donation was not processed and why.
2. The site administrators will receive an email with the same information.
3. A message will appear in the Financial Message Center. Immediately upon logging into WeShare, an administrator will be notified that there are messages waiting.

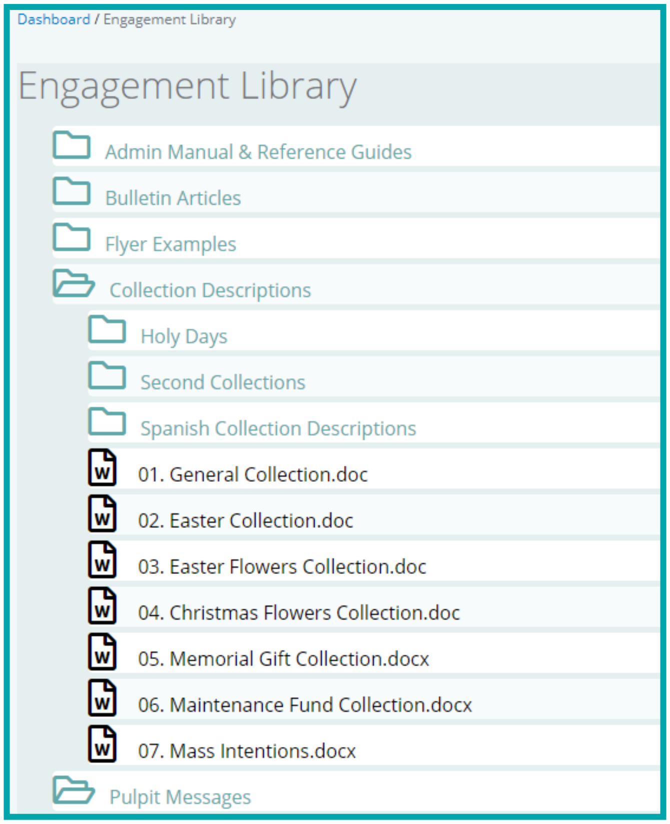


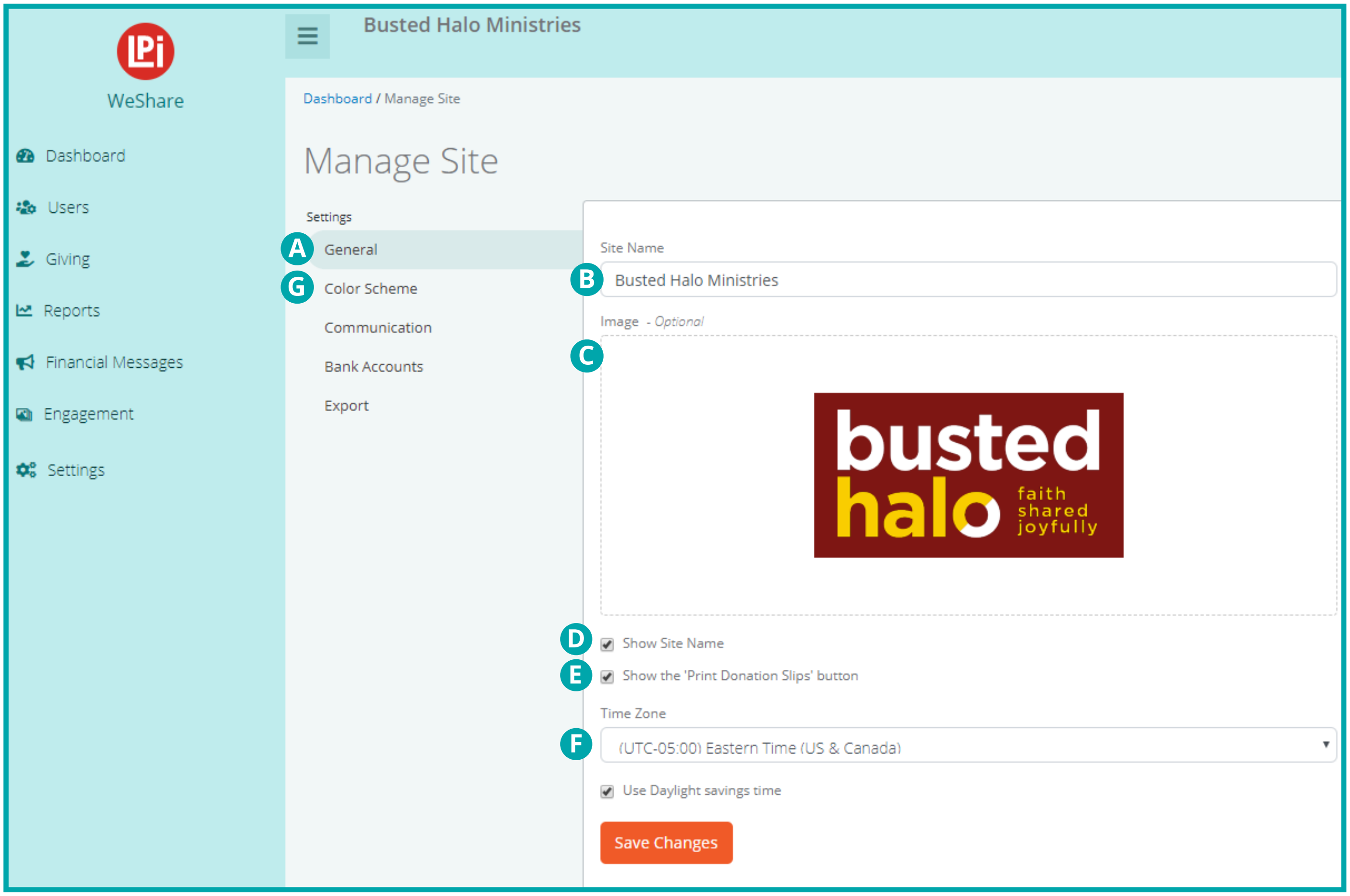
NEW!
- Search by name, date or reference number.
- Check the Select All box to delete all message or just a few at a time.
- Option to undo a message that was just deleted.

ENGAGEMENT

A library of templates to promote online giving at your parish. Includes flyers, bulletin articles, postcards, brochures and more.

New layout. Click on folders to review subfolders and related documents.





SETTINGS

A **General:** Site settings to make changes to your site.

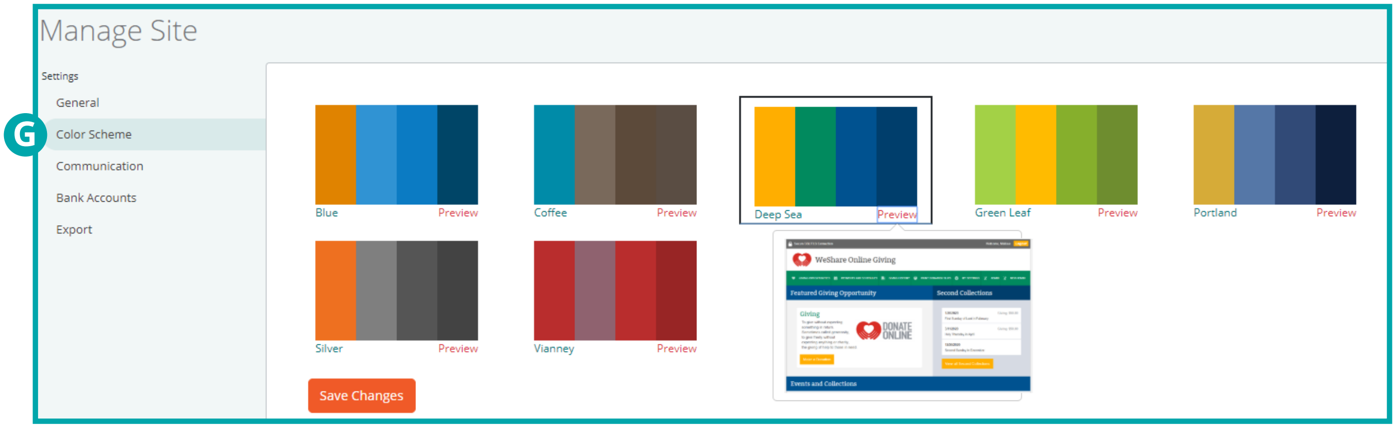
B **Site Name:** If you ever need to change the title of your site, simply type the new name into the Site Name box.

C **Image:** Add your church logo by dropping in an image or browse and upload an image from your computer.

D **Show Site Name:** If your logo contains your church name, you can choose to hide the site title text by checking the box.

E **Show the "Print Donation Slips" button:** The option to print a donation slip is defaulted to appear as an option for your donors. If you do not wish to provide the Donation Slips option, simply uncheck the box and click Save Changes.

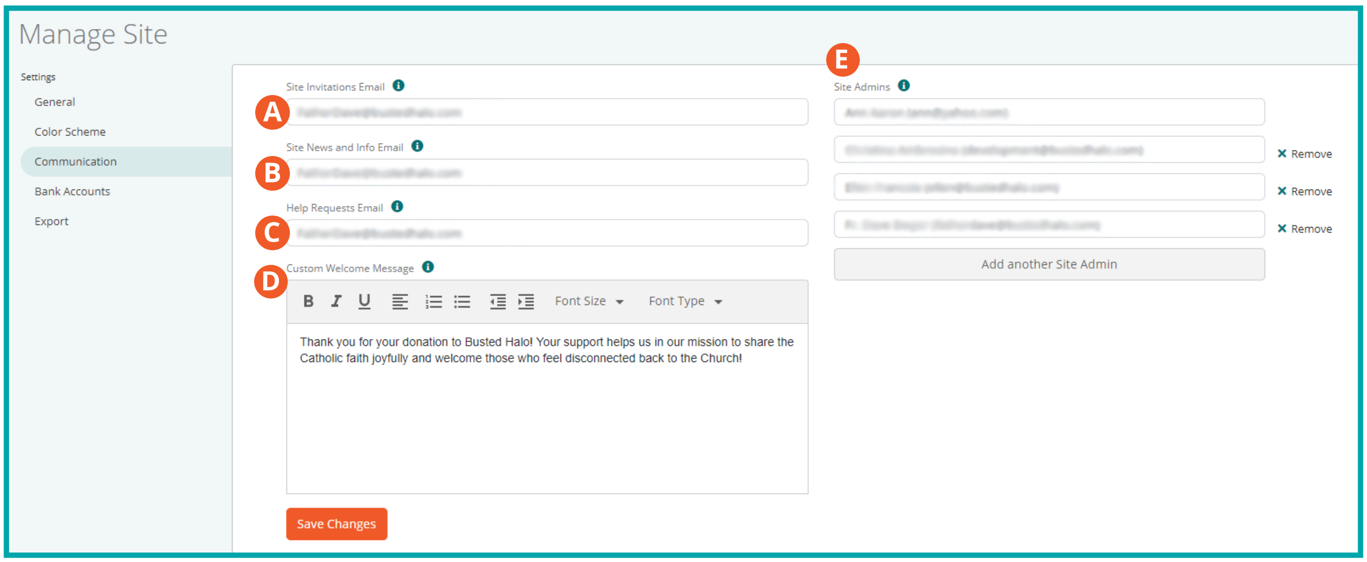
F **Time Zone and Daylight Savings Time:** Your Engagement Manager should have configured your time zone settings. If the settings are incorrect, however, you can easily change them here.



G **Color Scheme:** Updated display range of colors for each scheme option. To change the color scheme, click on the colors you would like to use, and then click Save Changes. New to Color Scheme is the option to preview what the combo of colors will look on the front end of the site. Click on Preview to view.

COMMUNICATION

There are three different email settings for the site, as donors are more likely to open an email from someone they recognize than from someone they don't. This section also contains the option to create a custom welcome message and give admin site access.



A **Site Invitations Email:** The temporary password/invitation emails sent out from the site will appear to donors to be coming from this email address.

B **Site News and Info Email:** If you use the Send an Immediate Email function, those emails will appear to be coming from this email address.

C **Help Requests Email:** If a donor sends in a general help request to the site itself, it will show up in this mailbox.

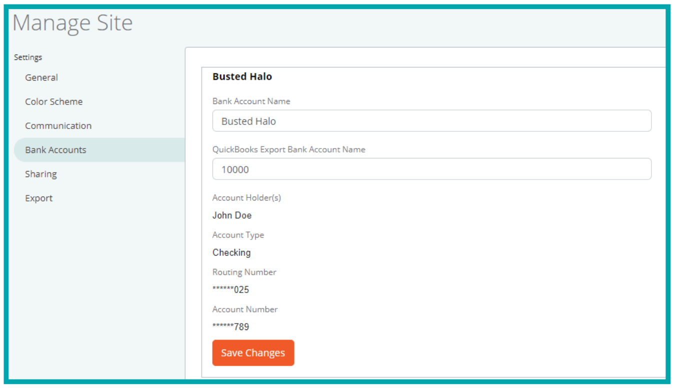
D **Custom Welcome Message:** Write a default custom message to be sent out to new users. A temporary password will accompany the message allowing them to log in.

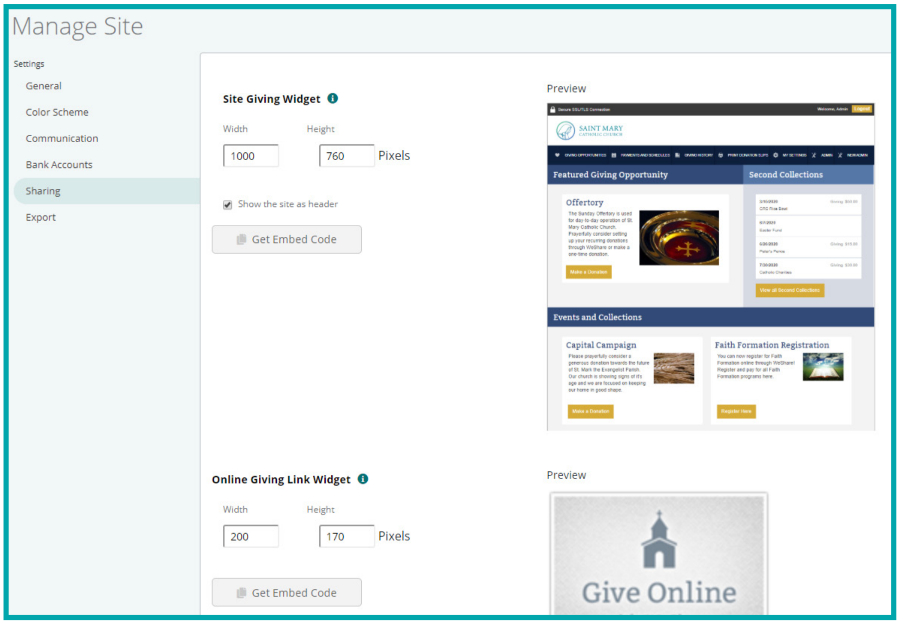
E **Site Admins:** Everyone who is a user on the site has the potential to be an Administrator, but only if an existing Administrator allows it. To grant a user administrative access, click on Add another Site Admin, search name and Add. Once complete this user will now have equal access to the site.

BANK ACCOUNTS

Bank accounts are added to your site at the time of onboarding. If you are looking to verify the bank account name or account information, it can be done here.

Note: Bank account information can only be changed through Customer Support. Please call 1-800-950-9952 for additional information on how to edit or add accounts.





SHARING

There are two ways to display WeShare on your website.

One is a simple button, and the other is a full site embed. Both options are available to you at any time, and set up is extremely simple. Once you have selected your option, click on the Get Embed Code button next to it. Adjust the size as necessary to fit your website needs, copy the HTML code from the Embed Code box, and give it to your webmaster for placement on your site.

Note: The full site embed has a minimum width of 628 pixels and a minimum height of 600 pixels. The simple button has a minimum width of 200 pixels and a minimum height of 170 pixels.

EXPORT

WeShare can be configured to produce reports that can be uploaded to various church management softwares as well as QuickBooks. Once set, there is no need to return to this icon unless you change your church management or accounting software.

If your system is not listed, select the WeShare CSV Export Format. This type of report will clearly detail all the information you'll need to manually enter report information into your software. If you have QuickBooks, select the Enable QuickBooks Funds Transferred Export option.