ONLINE GIVING with WESHARE

Introduction to Your New Admin Dashboard

ľ

e

e) =

INTRODUCTION TO YOUR NEW WeShare Admin Dashboard

TABLE OF CONTENTS

Logging Into Your Account
New Dashboard
Financial Overview
Users
Giving Management7Collections8Events9Creating a Ticket.10
Session Timeout
Reports 11 Key Words 13
Financial Messages
Engagement
Settings
Communication
Bank Accounts
Sharing
Export

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.

Secure SSL/TLS Connection				Welco	me, John Logout
SAIN1	r Matthia	S PARIS	FAITH fürst		
GIVING OPPORTUNITIES	PAYMENTS AND SCHEDULES	GIVING HISTORY	PRINT DONATION SLIPS	🔅 MY SETTINGS	🗙 admin

Option 2:

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

- 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.

	mber, Name, City or Stat	te.			
Account #	Name		÷	City ‡	State
	The Church of th	he Epiphany		Coon Rapids	MN
04-0279	Basilica of Our L	ady of Perpetual Help		Brooklyn	NY
05-0349	1730 W. Guadal	upe Rd, Mesa		Mesa	AZ
20-0409	All Saints Cathol	lic Church, Dallas		Dallas	ТХ
20-0979	All Hallows			La Jolla	CA



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



Hamburger Menu

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



Dashboard

This brings you back to the main Dashboard page.



Users

This will take you to "Manage Users," "Send Email," "Import Users," and "Export Users."



Giving

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



Donor Site

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



Reports

To pull activity data for Giving Opportunities and donors.



Financial Messages

Status messages received from the bank or credit card company.



Engagement

A library of resources and materials.



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*)

lanage Users						
arch 1	User Status 2				4	+ Add Use
Name	Envelope ID	Email Address	¢	Last Login Date	Join Date 🔶	Status
entz, Michael		mlentz@epiphanymn.org		8/30/2012 8:53:31 AM	5/29/2012 9:57:40 AM	Active
logan, Keith		hogankm@comcast.net		12/2/2012 7:40:42 PM	8/19/2012 8:08:06 PM	Active
Coates, Candy		candy.coates@comcast.net			8/19/2012 4:51:49 PM	Active
lapio, julie		jtapio58@comcast.net			8/19/2012 7:54:47 PM	Active
rzezdziecki, Stanley		theojean39@comcast.net		10/16/2015 12:58:44 PM	8/21/2012 12:44:54 PM	Active
irobst, martha		tmdjj@aol.com			8/21/2012 1:41:30 PM	Active
acobs-Pass, Elizabeth		clm12964@comcast.net		1/2/2013 2:39:13 PM	1/2/2013 2:39:13 PM	Active
Vernimont, Ralph		ralphwer@gmail.com		4/29/2016 11:32:01 AM	8/28/2012 1:14:09 PM	Active
(avanaugh, Dan		Bkavanaughs@gmail.com			9/3/2012 9:59:30 PM	Active
		hanumith1974@hotmail.com			9/7/2012 11·28·44 AM	Activo

Manage Users

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

- **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.
- **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.

Dasht	ooard / G	Siving Management			
Gi	ving	g Management			
Searc	:h 🚹		Filter 2		
Q			All Types		New
Clic	k and dra	ag to re-order 🛛 😤 Display on Home Page 🛛 🔽 Show Fir	st Collection or Event as Featured		
	*	Name New Event	Type 🔐 Event	🗹 Manage 🔲 C	lone
	*	Name Back to School Picnic	Type Collection	🖍 Manage 🌔 C	Ione
		Name New ticket	Type 🖀 Event	🖍 Manage 问 C	lone
		Name TK event	Type 🖀 Event	🖍 Manage 🔲 C	lone
		Name TK event 08-08-2019	Type 😭 Event	🗹 Manage [🖵 C	Ilone

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

11	m	New Event	😤 Event	Manage	Clone
11	*	Name Back to School Picnic	Type 😤 Collection	2 🗷 Manage	Clone
Se	ettings	[
	Detai	ils	Collection Name	Image - Optional	
	Paym	nent B	Giving		
	Form	15	URL		
	Share		Giving	ΠΟΝΔΤΙ	
	Comr	munication	L https://demo9.weshareonline.org/Giving 1		
	Deac	tivate F	Brief Description		
9	Trans	saction Activity	To give without expecting something in return. Sometimes called generosity, to give freely without expecting anything or charity, the giving of help to those in need.	Direlay on Hame Dage	
			168/300		
Ex	port Se	ettings	Full Description	Start Date - Optional	
	Finan	ncial	BIU≣≣≣≣	mm /dd /saar	-

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.
 - **G** Forms: Same setup fields, but with a new look and a click-and-drag feature.
 - 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.
 - **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.
- 🕒 **Export Settings:** Fund Number set up in this location for reporting purposes.

Knights of	Columbus Dues 🛱 Event	Anage L C
tings		
Details	Event Name	Time
Payment B	Golf Tournament (August 14th - 16th)	All Day Event
Forms and Tickets	✓ Display Location - Optional	08/14/2020
Share D	Street Address 1	
Communication	1234 W Greenfield Ave	Image - Optional
Deactivate	Street Address 2	
ent Reports	City	
Registration List	Greenfield	and the second second
Event Dashboard	State Zip Code	2 Land
	WI 53214	the second s

Events

- 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.
 - **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.
 - **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.

- **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."

Name Celebration of Marriage D	Type Dinner Date Night Event				Clone
Settings Details	Add to Event				2 S Create Ticket
Payment	Per Couple(Husband and Wife)	A	Quantity Unlimited	Price \$54.00	🕄 Add Form 🛛 👕 Delete
Forms and Tickets Share	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.

- 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.

Transfer Report		May 16, 2020 thr	Powered by
ACCOUNT	TRANSACTION TOTALS		
Name Sprint 2007 edit	05/15/2020 - 05/18/2020		\$0.00
Fotal Transfered	05/18/2020 - 05/19/2020		\$0.00
\$775.64	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

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.

Name Capital Campaign Type OTV Capital Campaign ACH Phymerin Total 1 Interaction type Bears for Bears for	GIVING OPPORTUNITY	PAYMENT SOL	JRCE TO	TALS			
Capital Cangeland ACH Payments Tadi Tannafer Annount ACH Payments Tadi Tannafer Annount ACH Payments Tadi ACH Changebacks ACH Changebacks ACH Changebacks ACH Fore Canadi Cangebacks ACH Fore Canadi Cangebacks ACH Payments Canadi Cangebacks ACH Payments Canadi Cangebacks Canadi Cangeback Candi Cangeback Canadi Cangeback Candi Cangeback Candi Cangeback	Name	Туре		QTY			To
Nume Invariant Inv	Capital Campaign	ACH Payments Tota	1	1			\$5.0
ACH Chargebacks 0 ACH Haufbert Funds 0 ACH Haufbert Funds 0 ACH Haufbert Funds 1 Lin Cask 1144 Art Free ACH Return Fees Central Card Payments 0 Credit Card Payments 0 Credit Card Payments 0 Credit Card Fees 0 Credit Card Fees Central Card Fees Ce	Transfer Amount \$4.92	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	Amou \$5.0
ACH Insufficient Funds 0 ACH Insufficient Funds ACH Frees 1 ACH Frees 1 Insues Insues In Fare Insues		ACH Chargebacks		0			\$0.0
ACH Fores 1 Liu Cista Brief Mit		ACH Insuffcient Fund	ds	0			\$0.0
Item Item Temperation Temperation Departs Tem Departs		ACH Fees		1			\$0.0
ACH Return Fees 0 Credit Card Psyments 0 Credit Card Chargebacks 0 Credit Card Fees 0 Credit Card Fees 0 Credit Card Fees 1 Transaction Anount 1 Transaction Fees 1 Not Transaction Depart 1 Transfer Anount 1		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	Amou \$0.0
Credit Card Paymenta 0 1		ACH Return Fees		0			\$0.0
Credit Card Chargebacks 0 Credit Card Field Credit Card Field Cross Transaction Amount Transaction Press Net Transaction Deposit Transfer Amount		Credit Card Paymer	nts	0			\$0.0
Credit Card Fees 0 Gross Transaction Ancount Transaction Pees Net Transaction Deposit Transler Ancount 1		Credit Card Charge	backs	0			\$0.0
Gross Transaction Annuart Transaction Free Net Transaction Deposit Transfer Annuart		Credit Card Fees		0			\$0.0
Transaction Peers 1 Net Transaction Peers 1 Transfer Anount 1					Gross Transacti	on Amount	\$5.0
Net Transaction Deposit 1					Transa	ction Fees	\$0.0
					Net Transacti Trans	on Deposit	\$4.9 \$4.9

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.

New Page Lavout!

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	L	• : []	× 🗸	<i>f</i> x Giv	/ing Opportu	unity													
	A	В	С	D	E	F	G	н	1	J	к	L	м	N	0	Р	Q	R	S
1	Giving Opp	Envelope	I Referen	ce Submit D	a ^r Processed	Payment	Card/Acco	Amount	First Nam	e Last Name	Email Add	r Street Add	Street Add	l City	State	Zip	Phone Nur	nber	
2	Capital Ca	8144	LUIS CO	IT 06/05/20	2 06/17/202	2 ACH	Checking	\$5.00	Luis	Costa	yalelou@y	4040 Purs	e La Pac #7	San Diego	CA	92122			
3	Second Co	8274	PATRICI	106/05/20	2 06/17/202	2 ACH	Checking	\$110.00	Patrisia	Motiville	pmillea	2930 Lam	ont Street	San Diego	CA	92109	(0, 0000	1015	
4	Second Co	8243	MARCIN	IE 06/05/20	2 06/17/202	2 ACH	Checking	\$30.00	Margaret	Paircer	mpalmer	9643 Club	orne Sq.	La Jolla	CA	92037	(000) 000-	1000	
5	Second Co	8144	LUIS COM	ST 06/05/20	2 06/17/202	2 ACH	Checking	\$5.00	Lois .	Com	yahihadiy	1040 Purs	r Lo Pac #7	San Diego	CA	92122			
6	Special Dio	8218	SUSING A	N 06/05/20	2 06/17/202	2 ACH	Checking	\$100.00	Sunan and	through 1	solarandtij	4410 0	at the	Brawley	CA	92227	(766) 344	1075	
7	Sunday Co	8233	JOHN IN	06/05/20	2 06/17/202	2 ACH	Checking	\$130.00	Julio	Fi mo	discentri-	725 Colley	# 9t #	La Jolla	CA	92037	(856) 456	1084	
8	Sunday Co	8026	KELLTIN	C 06/05/20	2 06/17/202	2 ACH	Checking	\$75.00	KENNER	DI	KEDELØH	1085 AGA	10.97	San Diego	CA	92109	(854)-688	1099	

Report Type	Date Range 🕕					
Donor Activity 4	04/28/2020 - 05/	04/202(Run Report				Export Report
Show/Hide Columns	Enter Searc	h Text Here ×				
III Activity Type 🔻 🗵						
Date T Activity	T Change Made By	T Account Owner	▼ Paymen ▼ Paym	ent Type	▼ Giving Type	T Amo
Activity Type: Create Pay	ment Source (2 items)					
05/01/2020 Create Pay	. ann ann	Walters Chartler	Visa Card 11 Visa			
05/01/2020 Create Pay	. ann ann	Wallion Chariter	MasterCard Maste	erCard		
Activity Type: Payment S	ource Updated (1 items)					
	/					
		-				
Report Type	Date	Range 🕕				Export Report
Email Delivery Issues	۰ 0.	1/26/2020 - 05/26/2020	Run Report			
Show/Hide Columns	Enter Search Tex	د Here ×				
 Select All Issue Type 						
Date	τ Email Address	v User Name	T Status Code	τ Reason		τ Action
	en permedidational	Degle Devero		Invalid address		Remove Invalid Email
Email Address						
🗭 Email Address 🗹 User Name	gar-angly loost	Gursen De La Norrea		Invalid address		Remove Invalid Email
 Email Address User Name Status Code 	and a second sec	Guesse De La Norm Dego Deraro Afrai ant Suar Tentent		Invalid address Invalid address		Remove Invalid Email Remove Invalid Email Remove Invalid Email Remove Invalid Email
 Email Address User Name Status Code Reason Action 	printigate and engine and pipe and another determination terrarely (1994) and	Gurann De La Fuera Degle Derario Athad and Suaer Tandend Krozen Fuez		Invalid address Invalid address Invalid address Invalid address		 Remove Invalid Email Remove Invalid Email Remove Invalid Email Remove Invalid Email
Ø Email Address Ø User Name Ø Status Code Ø Reason Ø Action	gittelije og sanderi jer og anderi jer og anderi jer og	Gamera De La Avene Despo Servero Artest and Salam Tanànat Krasan Rosa Gamera De La Parma		Invalid address Invalid address Invalid address Invalid address Invalid address		Remove Invalid Email
W Email Address W User Name W Status Code W Reason W Action Invalid Email 05/03/2020	Prosperior Prospe	Gurano De La Fuerza Degle Servico Arheit and Duain Yandend Kolann Ross Gurano De La Fuerza Higher anti Brigger Yang	-	Invalid oddress Invalid address Invalid address Invalid address Invalid address Invalid address		Remove Invalid Email
Email Address User Name Staus Code Reason Action Invalid Email OS/03/2020	principal princi	Gurano De La Fuerza Deglo Servico Arheit en Duan Yandem Kolan Rus Gurano De La Fuerza Hagna anti Brigan Yang		Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address		Remove Invalid Email
Email Address User Name Staus Code Reason Action Invalid Email 05/03/2020 Report Type	Da	te Range 🚺		Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address		Remove Invalid Email
Email Address User Name Status Code Reason Action Invalid Email 05/03/2020 Report Type Transaction Activity	¢	te Range 🕕 26/28/2020 - 07/28/2020	Run Report	Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address		Remove Invalid Email
Email Address User Name Status Code Reason Action Invalid Email 05/03/2020 Report Type Transaction Activity Show/Hide Columns	Da ¢	te Range 🚺 06/28/2020 - 07/28/2020 h Text Here ×	Run Report	Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address		Remove Invalid Email Email Email
Email Address User Name Staus Code Reason Action Invalid Email OS/03/2020 Report Type Transaction Activity Show/Hide Columns	¢ Enter Searc	te Range ① D6/28/2020 - 07/28/2020 h Text Here ×	Run Report	Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address		Remove Invalid Email Export Rep
	Enter Searc	tte Range ① D6/28/2020 - 07/28/2020 h Text Here ×	Run Report	Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address		Remove Invalid Email Export Rep
Email Address User Name Staus Code Reason Action Invalid Email 05/03/2020 Report Type Transaction Activity Show/Hide Columns Drag columns to group he Date Y Name	Enter Searc	te Range ① D6/28/2020 - 07/28/2020 h Text Here × Y Envelope Id# Y Givin	Run Report	Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address	T Amount	Remove Invalid Email Export Rep
Email Address User Name Status Code Reason Action Invalid Email 05/03/2020 Report Type Transaction Activity Show/Hide Columns Drag columns to group he Date Y Name 07/27/2020	Enter Searc	te Range OG/28/2020 - 07/28/2020 h Text Here × Y Envelope Id# Y Giving 12 LIAT	Run Report	Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address Invalid address	▼ Amount \$12	Remove Invalid Email Export Rep Y Payment Type 00 Credit Card

- 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.
- 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.

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

Report Type		Mont	hs 🕕				•
Expired Credit C	ard	\$		Run Report			Export Report
Show/Hide 0	olumns	Enter Search	a Text Here ×				
Drag columns to	group here	me	last Successful Typ	Expiration Date	× Amount ×	Pattern	Giving Opportunity
East Nume	i institu	ine i	09/01/2020	May 2020	\$10.00	Weekly	General Collection
Parest	Januar		08/05/2020	November 2019	\$45.00	Monthly	General Collection
Chartter	Multima.		None	October 2019	\$50.00	Annually	First Sunday of Lent in
Chartler	Malicia		None	October 2019	\$10.00	Annually	Second Sunday in Dec
Charitian	Matteria		08/30/2020	October 2019	\$10.00	Weekly	Giving
Follow	Trank.		09/01/2020	October 2018	\$40.00	Weekly	General Collection
Polliner	Frank		None	October 2018	\$5.00	Annually	Mass Intentions
Onte	1.114		08/20/2020	April 2018	\$50.00	Monthly	General Collection
and a second	(in spinor)		03/18/2018	March 2018	\$100.00	Weekly	General Collection
			09/01/2020	December 2017	\$50.00	Semimonthly	General Collection

Summary

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:



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.

Dashboard / Financial Messages		
Financial Messages		10 messages have been deleted. Undo
Select All Tolete Search by name or refrence number Search		<u> </u>
Message	¢	Date Time 🔶

Dashboard / Engagement Library

Engagement Library

- **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.

Admin Manual & Reference Guides New layout. Click on folders to review **Bulletin Articles** subfolders and related documents. Flyer Examples **Collection Descriptions** Holy Days Second Collections Spanish Collection Descriptions w 01. General Collection.doc w 02. Easter Collection.doc w 03. Easter Flowers Collection.doc w 04. Christmas Flowers Collection.doc w 05. Memorial Gift Collection.docx w 06. Maintenance Fund Collection.docx w 07. Mass Intentions.docx Pulpit Messages



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.
- **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.

Manage Site		A	
Settings General Color Scheme Communication Bank Accounts Export	Site Invitations Email A Site News and Info Email B Help Requests Email C Custom Welcome Message B X U E E E E E E Font Size ▼ Font Type ▼ Thank you for your donation to Busted Halol Your support helps us in our mission to share the Catholic faith joyfully and welcome those who feel disconnected back to the Churchi	Size Admins	X Remove X Remove X Remove
	Save Changes		

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

Manage Site	
Settings	
General	Busted Halo
Color Scheme	Bank Account Name
Communication	Busted Halo
Bank Accounts	QuickBooks Export Bank Account Name
Sharing	10000
Export	Account Holder(s)
	John Doe
	Account Type
	Checking
	Routing Number
	******025
	Account Number
	******789
	Save Changes

Manage Site		
Settings General Color Scheme Communication Bank Accounts	Site Giving Widget Width Height 1000 760 Pixels	Preview The many first constraints The many first constr
Sharing Export	Show the site as header	<section-header> Numerical interview Numerical interview Numerical interview Numerical interview</section-header>
	Online Giving Link Widget Width Height 200 170 Pixels Get Embed Code	Preview Give Online

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.

ttings	
General	Z Enable Contribution Export
Color Scheme	Export File Type
Communication	WeShare CSV Export Format
Bank Accounts	Enable Contribution Cash Basis Export
Sharing	Enable QuickBooks Funds Transfered Export
Export	Fee Expense Account Name
	100014
	Monthly Fee Bank Account Name
	1212
	Enable Gabriel Software Integration



01-20-135-20v1