

WebVIEW

Custer Road UMC's Online Database, Directory and Electronic Giving Website

Introduction

WebVIEW is a web interface that allows all church members to interact electronically with the church and other members. Members will be able to update their address, phone numbers, and/or email address when changes occur and have those changes reflected immediately in the church's database. The interface also provides for an Online Directory. Users determine what, if any, of their information can be viewed by other church members online. Another important feature of WebVIEW is the ability to setup electronic giving through either a bank account or credit card. One-time or recurring options are available. Finally, regardless of whether or not someone gives electronically online, all members will be able to view their contribution history, updated weekly, and print tax statements at year end.

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A. First Time User

Connecting To WebVIEW

Go to Custer Road UMC's homepage (www.crumc.org) and click the **WebVIEW** link from the left panel. From the WebVIEW homepage, click the **"HERE"** link to access the login page.

Retrieving Your Password

Step 1: When the WebVIEW login page opens, click the link under **"Forget Your Password?"** to have your password emailed to you.

Step 2: In the popup window, type in the primary email address that the church has on record for you and click **Continue**. (Only click Continue ONE TIME – as long as you see a message that says *"Passwords are being sent"*, then it worked. Simply click **Cancel** to close the popup window.)

Step 3: Watch your email inbox for a notification to come through. This could take up to 5 mins.

In the email you will receive, it will have an ID #, your name, and a system-generated password (you can change this once logged in).

Incorrect and/or No email address. If you see a message that says *"There are no users with e-mail addresses in the criteria you selected. No e-mails will be sent."*, then your email address does not match what the church has on record for you. Please send an email to vcompton@crumc.org with the primary email address you wish to have added to the church's database.

Same email address on multiple members. If you and your spouse, for example, have the same email address on your church's records, then you will receive 2 separate emails with 2 different ID #s and passwords for each person. (ISSUE CURRENTLY BEING RESOLVED BY WebVIEW. Please contact vcompton@crumc.org if you encounter any issues.)

B. Setting Your Preferences Within WebVIEW

Logging into WebVIEW

From the WebVIEW login page (see **Connecting To WebVIEW** above), enter either your email address or your ID# and your password. Click **Login**.

Changing Your Password

Step 1: Select the **Personal Profile** tab.

Step 2: You will see all your family members listed. Click once on your name. The following screen will appear.

Step 3: Click on **Change Password**. Two boxes will appear asking for your new password.

Step 4: To accept the changes, click **Update**. Otherwise, to keep your original password, click **Cancel**.

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Transforming LIVES

home | directory | **personal profile** | online giving | contribution history

Member Details
* Indicates Required Field

Personal Information

Login: 1381
Title:

* First and Middle Names:

Salutation:

* Last Name:

Suffix:

Birth Date: (MM/DD/YYYY)
The year is used for internal purposes only and will not appear in the directory.

Employer:

Position:

Occupation:

Change Password...

Address

Address 1:

Address 2:

City:

State:

Postal Code:

Phone Numbers

Home Phone:

Business Phone:

Cell Phone:

Pager:

Electronic Contact Information

* E-mail Address:

Web Address:

Directory Security

Pertaining to Me:

Show Me in the Directory

Allow Detail View Access

Show Address

Show Phone Number

Show E-mail Address

Show Photo

Pertaining to My Family:

Show My Family in the Directory

Inherit My Rights

NOTE: Changes will not be visible in the Directory until approved by your administrator

Allowing Other Church Members To View Your Information Online

Every family can decide what, if any, information they want shown in the online directory. By default, all members' information is hidden, so no action is needed if a family decides not to have their information available.

****NOTE* Remember that only church members can log into WebVIEW, so the online directory is essentially like having the church's actual printed directory online. Members' information is NOT accessible to just anyone on the WWW.***

The Head of Household's login (usually the husband) is the only one who can setup and change these settings. Therefore, that individual must be the one to log into WebVIEW initially.

Step 1: Select the **Personal Profile** tab.

Step 2: Click on the Head of Household's name. The following screen will appear. The **Directory Security** section contains the controls for the Online Directory.

Step 3: Click on the box next to each item to change your preferences.

Pertaining to Me:

Show Me in the Directory – shows first and last name only

Allow Detail View Access (*not recommended*) – shows birthday (month/day only), cell phone numbers, and employer/job information

Show Address – shows home address

Show Phone Number – shows home phone number only

Show E-mail Address – shows all email addresses on record

Show Photo – *not applicable*

Pertaining to My Family:

Show My Family in the Directory – will only show first and last names of family regardless of what boxes are checked under the "Pertaining to Me" section

Inherit My Rights – when checked along with "Show My Family", the directory will show the same information next to each family member that is selected under "Pertaining to Me"

Step 4: Click **Update** when finished.

Member Details

* Indicates Required Field

Personal Information Login: 1381 Title: <input type="text"/> <input type="button" value="Q"/> * First and Middle Names: <input type="text" value="Alfred"/> Salutation: <input type="text" value="Fred"/> * Last Name: <input type="text" value="Flintstone"/> Suffix: <input type="text"/> <input type="button" value="Q"/> Birth Date: <input type="text" value="1/1/1900"/> <input type="button" value="D"/> (MM/DD/YYYY) <small>The year is used for internal purposes only and will not appear in the directory.</small> Employer: <input type="text"/> Position: <input type="text"/> Occupation: <input type="text"/> Change Password...	Address Address 1: <input type="text" value="999 Rubble Way"/> Address 2: <input type="text"/> City: <input type="text" value="Plano"/> State: <input type="text" value="TX"/> Postal Code: <input type="text" value="75023"/> Phone Numbers Home Phone: <input type="text" value="(972) 596-9999"/> (999) 999-9999 Business Phone: <input type="text"/> (999) 999-9999 Cell Phone: <input type="text" value="(214) 888-8888"/> (999) 999-9999 Pager: <input type="text"/> (999) 999-9999 Electronic Contact Information * E-mail Address: <input type="text" value="fred@flintstone.org"/> Web Address: <input type="text"/> Additional Comments <input type="text"/>
Directory Security Pertaining to Me: <input type="checkbox"/> Show Me in the Directory <input type="checkbox"/> Allow Detail View Access <input type="checkbox"/> Show Address <input type="checkbox"/> Show Phone Number <input type="checkbox"/> Show E-mail Address <input type="checkbox"/> Show Photo Pertaining to My Family: <input type="checkbox"/> Show My Family in the Directory <input checked="" type="checkbox"/> Inherit My Rights <input type="button" value="Update"/> <input type="button" value="Cancel"/>	

NOTE: Changes will not be visible in the Directory until approved by your administrator

C. Updating Membership Information

Keeping your information up to date benefits both the church and its members. The church can save money on reducing returned mail to incorrect addresses. Members stay informed and are assured of receiving timely information regarding church and specific ministry activities.

****NOTE* Personal information can be maintained here regardless of whether or not you choose to show your information in the Online Directory. This section interfaces directly with the church's internal database.***

Step 1: Select the **Personal Profile** tab.

Step 2: Click on the Head of Household's record (usually the husband) to change Main Address and Home Phone # fields. These fields are maintained under the Head of Household's record only. However, either spouse has access to change this information.

Step 3: Simply delete and replace any old information.

Step 4: Click **Update** when finished to save changes.

Step 5: All other information, such as cell phone numbers and email addresses, is specific to each user and can be changed under the respective record. Follow Steps 2-4 to make changes to this information on individual records.

Children will only be able to see and change their specific record under Personal Profile.

D. Using the Online Directory

This feature allows you to search for names, addresses and phone numbers online. However, it is completely dependent upon individual families logging into WebVIEW and allowing their records to be seen in this online format. As additional people start using the system, the directory will contain more information.

***NOTE* Remember that only church members can log into WebVIEW, so the online directory is essentially like having the church's actual printed directory online. Members' information is NOT accessible to just anyone on the WWW.**

Step 1: From within WebVIEW, click on the **Directory** tab.

Step 2: There are 2 ways to search for records.

- a. **Last Name:** - Click one of the alphabetical letters to display all records where the last name begins with the letter chosen or:
- b. Choose a criteria field from the drop down list. Type in any alphanumeric character, and then click **Search**.



E. Online Giving

Setting Up a One-Time or Recurring Gift

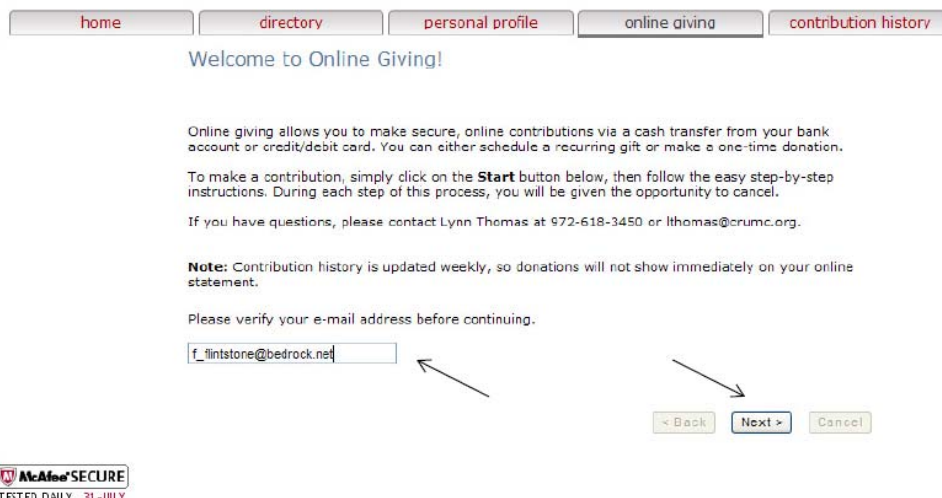
If you would like to make a one-time gift or a recurring donation to the church, you can do either of these options by selecting the **Online Giving** tab.

As long as the church recognizes that spouses pledge together, then both spouses will be able to view and print the contribution history under their individual WebVIEW logins. Both spouses can also schedule or make a donation, but the donations you set up must be edited under the originating user's ID.

The transactions are secure and meet the rigorous standards required by major credit card companies to be PCI (payment card industry) compliant.



Step 1: Confirm your email address and click on **Next**.



Step 2: Choose between giving from your bank account or by using a credit card. Make your selection and click on **Next**.

home directory personal profile **online giving** contribution history

Choose Payment Type

Please select payment type:

Checking / Savings Account

Credit Card Account

Current recurring payments
No recurring payments to process.
To proceed to the next step of this process, click the "Next" button.
To cancel the process of making a contribution, click the "Cancel" button.

< Back **Next >** Cancel



Step 3: Choose the **frequency**, the **start date** if it is a recurring donation, the **number of payments** you would like to schedule and enter the **amount** of your donation beside the designated purpose of your gift.

If the area in which you want to give is not listed, simply enter the amount beside **Other gift** and tell us in the memo box your desired area for the funds.

Complete this screen by clicking on **Next** at the bottom of the screen.

home directory personal profile online giving contribution history

Provide Amount, Purpose, and Frequency

Next, choose the frequency of this gift and, next to the purpose, the amount you want to give to that purpose.

Frequency:

Begin Date:

Number of Payments: Pay Until Further Notice

Purposes

-2009 Church Operating Fund: \$ <input type="text"/>	-Paid In Full Campaign: \$ <input type="text"/>
Africa University: \$ <input type="text"/>	Altar Flowers: \$ <input type="text"/>
Care Ministry: \$ <input type="text"/>	Children's Choir gift: \$ <input type="text"/>
Community Assistance Fund: \$ <input type="text"/>	Food Pantry - God's Work: \$ <input type="text"/>
Food Pantry - Plano: \$ <input type="text"/>	Friday NITE Friends: \$ <input type="text"/>
Grief Support: \$ <input type="text"/>	Handbell gift: \$ <input type="text"/>
Head Start / Bed Start: \$ <input type="text"/>	Heart of Haris: \$ <input type="text"/>
JOB Support: \$ <input type="text"/>	Jr Hi Revelation Choir gift: \$ <input type="text"/>
Junior High Mission Trip gift: \$ <input type="text"/>	Juntos Servimos gift: \$ <input type="text"/>
Library gift: \$ <input type="text"/>	Marriage Ministry: \$ <input type="text"/>
Meals on Wheels: \$ <input type="text"/>	Memorial or Honorarium: \$ <input type="text"/>
Mexico Mission gift: \$ <input type="text"/>	Micah Choir gift: \$ <input type="text"/>
Other gift - designate in memo below: \$ <input type="text"/>	Prayer Conference gift: \$ <input type="text"/>
Prayer Ministry: \$ <input type="text"/>	Project Transformation gift: \$ <input type="text"/>
Samaritan Inn: \$ <input type="text"/>	Senior High Mission Trip gift: \$ <input type="text"/>
Sr Hi Revelation Choir gift: \$ <input type="text"/>	Treasured Times: \$ <input type="text"/>
	TOTAL: \$ <input type="text" value="0"/>

Memo:

< Back Next > Cancel



Step 4: Confirm your total offering for each designated purpose is correct by clicking **Next**.

If you need to make a change click **Back** or if you decide to cancel the process click **Cancel**.

You will be redirected to the secure Payment Data Systems site to enter all your financial information. None of this information is stored by the church.

[home](#) [directory](#) [personal profile](#) [online giving](#) [contribution history](#)

Review and Confirm Contribution Information

Finally, review the summary below to make sure all the information you have entered is correct.

Contribution Summary
Weekly
Purpose(s): -2009 Church Operating Fund: \$25.00
Total Amount: \$25.00

To review or change the information you entered in a previous step, click the "Back" button.
To cancel the process of making a contribution, click the "Cancel" button.

To continue processing this contribution, click the next button.

You will then be redirected to a secure Payment Data Systems site.

For more information about the redirect, click [here](#).

[< Back](#) [Next >](#) [Cancel](#)



Step 5: Enter the required information. How you choose to give, by bank account or credit card, will determine the screen you see.

Screen for checking



Amount: \$25.00

First Name:
Last Name:
Payment Method:
Routing Number:
Account Number:



Screen for credit card



Amount: \$25.00

First Name:
Last Name:
Payment Method:
Address:
City: State/Prov:
Zip:
Country:
Card Type:
Credit Card Number:
Expiration Date: /
Card Verification Number:



Once completing the required fields, click **Next**.
You can also **Cancel** if you need to at this point.

Step 6: Verify all the information entered is correct and click **Submit**.
Edit the transaction if you need to make a correction or **Cancel** if you decide not to continue.

PAYMENT
Data Systems
Custer Road United Methodist

Please confirm the payment information and click the Submit button.

Amount: \$25.00

First Name:
Last Name:

Address:
City:
Zip:

Payment Method: Credit Card
Card Type: MasterCard
Credit Card Number: ****9060
Expiration Date: 03/2012

Submit Edit Cancel

You will receive a confirmation on the screen letting you know the transaction is complete. An email will arrive shortly in your mailbox as well.

One-time gift successfully received!

Transaction Number: 090731152536087
Transaction Date: 7/31/2009


Contribution Amount: \$25.00
Contribution Purpose: -2009 Church Operating Fund (\$25.00)

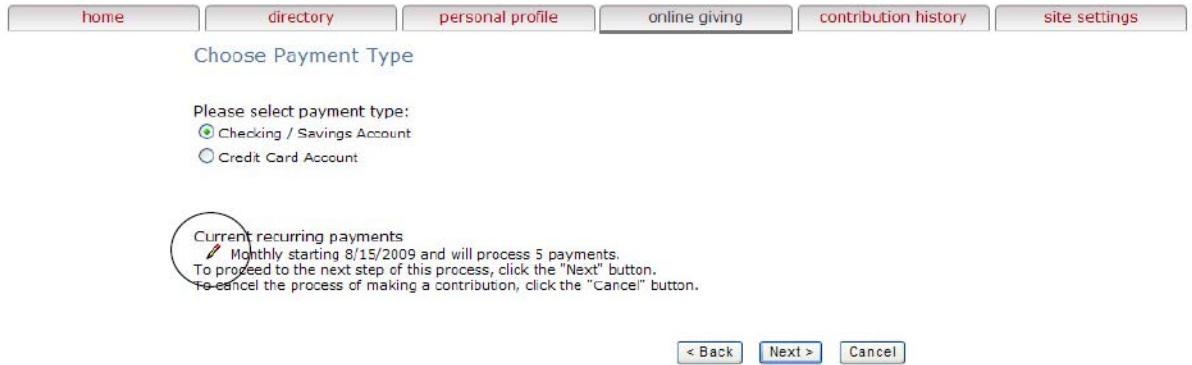
Return

Select **Return** to return to WebVIEW.

Editing a Recurring Transaction

The donations you set up are available to you to edit or change. Any donations your spouse has initiated will need to be accessed using his or her login ID.

- Step 1: Log in using the appropriate ID and password.
- Step 2: Select the **Online Giving** tab.
- Step 3: Confirm your email address and click on **Next**.
- Step 4: Click the pencil icon  beside the recurring transaction you want to edit.



The screenshot shows a navigation bar with tabs: home, directory, personal profile, online giving (selected), contribution history, and site settings. Below the navigation bar is the heading "Choose Payment Type". The text "Please select payment type:" is followed by two radio button options: "Checking / Savings Account" (selected) and "Credit Card Account". Below this is a section titled "Current recurring payments" with a pencil icon. The text reads: "Monthly starting 8/15/2009 and will process 5 payments. To proceed to the next step of this process, click the 'Next' button. To cancel the process of making a contribution, click the 'Cancel' button." At the bottom right of this section are three buttons: "< Back", "Next >", and "Cancel".



Step 5: Select **Edit Payment** or **Stop Payment**.

Modify Recurring Payment

Name on the account:
Type of payment: Checking

Payment information

Total Amount: \$50.00

This payment occurs on a monthly basis starting on 8/15/2009 and will process 5 payments.
The next payment will be processed 8/15/2009

Purpose information

-2009 Church Operating Fund - \$50.00

Total \$50.00



Three buttons are displayed in a row: "Edit Payment", "Stop Payments", and "Cancel". The "Edit Payment" and "Stop Payments" buttons are circled together with a hand-drawn oval.

Step 6: If editing your gift, change the information and click **Next** at the bottom of the screen.

Remember, if the area in which you want to give is not listed, simply enter the amount beside **Other gift** and tell us in the memo box your desired area for the funds.

Finish the transaction by entering all the required account information.


If canceling your gift, a message box will appear.

Modify Recurring Payment

Name on the account:
Type of payment: Checking

Payment information
Total Amount: \$50.00
This payment occurs on a mo
The next payment will be pro

Purpose information
-2009 Church Operating Fund - \$50.00
Total \$50.00



Click **OK** to proceed or **Cancel** return to the previous screen. A screen will appear notifying you that the transaction has been canceled. You will no longer see the scheduled transaction on your **Online Giving** screen.


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Choose Payment Type

Please select payment type:

Checking / Savings Account
 Credit Card Account

Current recurring payments
No recurring payments to process.
To proceed to the next step of this process, click the "Next" button.
To cancel the process of making a contribution, click the "Cancel" button.

 TESTED DAILY 05-AUG

F. Checking Contribution History

The giving history of your household is also available to you through WebVIEW. All your giving, whether it is done online or on Sunday morning by check or cash, will be shown here.

Typically, giving records are combined under the Head of Household for reporting purposes, but both spouses can view the history.

However, if you and your spouse have chosen to give separately and have received individual paper statements in the past, each of you will continue to see your individual giving online. Each login ID will access their giving record in this case.

Contribution history is updated weekly, so donations will not show immediately on your online statement.

To get started, select the **Contribution History** tab.



You will see a visual representation of all your giving.

While both spouses can set up or make a donation, each person will only see the transaction history that they initiated.

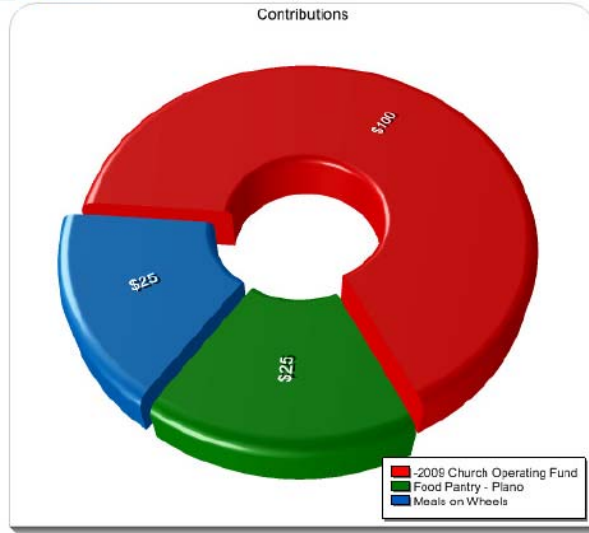
By selecting **View** you will be shown a more traditional statement that lists all your donations.

Contribution History

Select Year: 2009

Company: All Companies

Tax Statement: 1/1/2009 To 12/31/2009 View



Gift Date	Check #	Purpose	Tax Deductible?	Amount
7/7/2009	8944	Meals on Wheels	Yes	\$25.00
4/12/2009	8868	-2009 Church Operating Fund	Yes	\$100.00
3/22/2009	8847	Food Pantry - Plano	Yes	\$25.00

Online Transaction History

Date/Time	Status	Purpose	Frequency	Amount
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