

WebVIEW

Frequently Asked Questions

[What is WebVIEW?](#)

[How do I get my password?](#)

[Do I have to have an email address to sign on?](#)

[What if my email address is not on record or is incorrect, how can I get an ID and password?](#)

[More than one person in my household shares an email address. Will we all get passwords?](#)

[How do I log into WebVIEW?](#)

[How do I change my password?](#)

[Can I control the information displayed about me and my family?](#)

[Who has access to the online directory?](#)

[How do I set my preferences?](#)

[Can I update my information but opt-out of the online directory?](#)

[I'm not the Head of Household. Can I update our family's information?](#)

[What information can my children access and update?](#)

[How can I search using the online directory?](#)

[Can I send an email to someone directly from the directory?](#)

[Can I make a donation through WebVIEW?](#)

[Are the donations secure?](#)

[How do I make a donation?](#)

[Do I need to update my recurring donations for each year's Operating Campaign?](#)

[Can I change a recurring donation?](#)

[Can I see how much my family has given to the church this year?](#)

[My spouse and I give separately. Will our records be combined?](#)

[Can I see my contribution statement even if I don't donate using Online Giving?](#)

[I see a picture of my giving that looks like a lifesaver, but how do I get a more traditional statement of my giving?](#)

[Who can I contact if I want more information about WebVIEW?](#)

What is WebVIEW?

WebVIEW is a web interface that allows you to interact electronically with the church and other members.

You can:

- Update your address, phone numbers, and email addresses and have those changes reflected immediately in the church's database.
- Access and search an online church directory.
- Email church members.
- Automate your contributions.
- Monitor your giving history and print giving statements.

How do I get my password?

When the WebVIEW page opens,

Step 1: Click **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 minutes.

The email you receive will have an ID #, your name, and a system-generated password that you can change once you are logged in.

Do I have to have an email address to sign on?

Yes.

What if my email address is not on record or is incorrect, how can I get an ID and password?

If you get 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. Once it is added, you will be able to retrieve your password.

More than one person in my household shares an email address. Will we all get passwords?

If you and your spouse, for example, have the same email address on your church records, then you will receive 2 separate emails with 2 different ID #s and passwords for each person. (ISSUE CURRENTLY BEING RESOLVED BY WebVIEW.)

How do I log into WebVIEW?

Enter either your email address or your ID# and your password. Click **Login**.

How do I change my password?

- Step 1: Select the **Personal Profile** tab.
- Step 2: Click once on your name.
- Step 3: Click on **Change Password**.
- Step 4: Enter your new password in each of the two boxes.
- Step 5: Click **Update**. Otherwise, to keep your original password, click **Cancel**.

Can I control the information displayed about me and my family?

Yes, 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 make their information available.

Who has access to the online directory?

Only church members can log into WebVIEW, so the online directory is essentially like having the church's printed directory. Members' information is not accessible to anyone else.

How do I set my preferences?

The Head of Household's login (usually the husband) is the only one who can setup and change these settings.

- Step 1: Select the **Personal Profile** tab.
- Step 2: Click on the Head of Household's name.
- Step 3: Look toward the bottom left portion of the screen for the **Directory Security** section.
- Step 4: 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 5: Click **Update** when finished.

Can I update my information but opt-out of the online directory?

Yes, your information should be maintained regardless of whether or not you choose to show your information in the online directory. This section of WebVIEW interfaces directly with the church’s internal records.

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

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

Step 3: Delete or 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.

I’m not the Head of Household. Can I update our family’s information?

Yes. A spouse can update the information under the Head of Household’s record.

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

Step 2: Click on the Head of Household’s name (usually the husband) to change Main Address and Home Phone number fields.

Step 3: Delete or 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.

What information can my children access and update?

Children will only be able to see and change their specific record information, such as cell phone number and email addresses, under their Personal Profile.

How can I search using the online directory?

You can search by name, address, city, phone number, and email address. 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.

Only church members can log into WebVIEW, so the online directory is essentially like having the church’s printed directory.

Can I send an email to someone directly from the directory?

Yes. Once you locate the person in the directory, click on their listed email address.

Can I make a donation through WebVIEW?

Yes. You can make a one-time gift or a recurring donation to the church by selecting the **Online Giving** tab.

Contribution history for a family is typically combined under the Head of Household for reporting purposes, but both spouses can schedule or make a donation. The donations you set up are available to you to edit or change.

Are the donations secure?

Yes. The transactions are secure and meet the rigorous standards required by major credit card companies to be PCI (payment card industry) compliant. The church does not store any of the bank or credit card data on our servers.

How do I make a donation?

- Step 1: Select the **Online Giving** tab.
- Step 2: Confirm your email address and click on **Next**. A confirmation email will be sent to this email once the transaction is complete.
- Step 3: Choose between giving from your bank account or by using a credit card and click **Next**.
- Step 4: 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.

- Step 5: Click **Next** at the bottom of the screen.
- Step 6: Confirm your total offering for each designated purpose by clicking **Next**.

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.

- Step 7: Enter the required financial information and click **Next**.
- Step 8: Verify all the information entered is correct and click **Submit**.

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.

Select **Return** to return to WebVIEW.

Do I need to update my recurring donations for each year's Operating Campaign?

Yes. The donations you set up to cover the annual budget of the church are used for that designated year. Once that year ends, the funds need to be reassigned to a new budget year or other purposes.

Can I change a recurring donation?

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

Click **OK** to proceed or **Cancel** to 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.

Can I see how much my family has given to the church this year?

Yes. Typically, contribution history is combined under the Head of Household for reporting purposes and includes both spouses' donations.

All your giving, whether it is done online or on Sunday morning by check or cash, will be shown. Select the **Contribution History** tab.

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

My spouse and I give separately. Will our records be combined?

No. 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 the respective giving record.

Can I see my contribution statement even if I don't donate using Online Giving?

Yes. All your giving, whether it is done online or on Sunday morning by check or cash, will be shown. Select the **Contribution History** tab and select **View**.

I see a picture of my giving that looks like a lifesaver, but how do I get a more traditional statement of my giving?

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

Who can I contact if I want more information about WebVIEW?

Contact Virginia Compton at 972-618-3450 ext. 265 or vcompton@crumc.org.