Get to Giving

A Guide to Getting Started

National Church

Powered By PINEAPPLE PAYMENTS

app.pineapplepayments.com

You can get up and running within minutes.

Follow the steps below to:

1. Customize Your Giving Experience
2. Set Up & Share Your Giving Page
3. Enable Recurring Giving
4. Track Giving With Reports

Important:

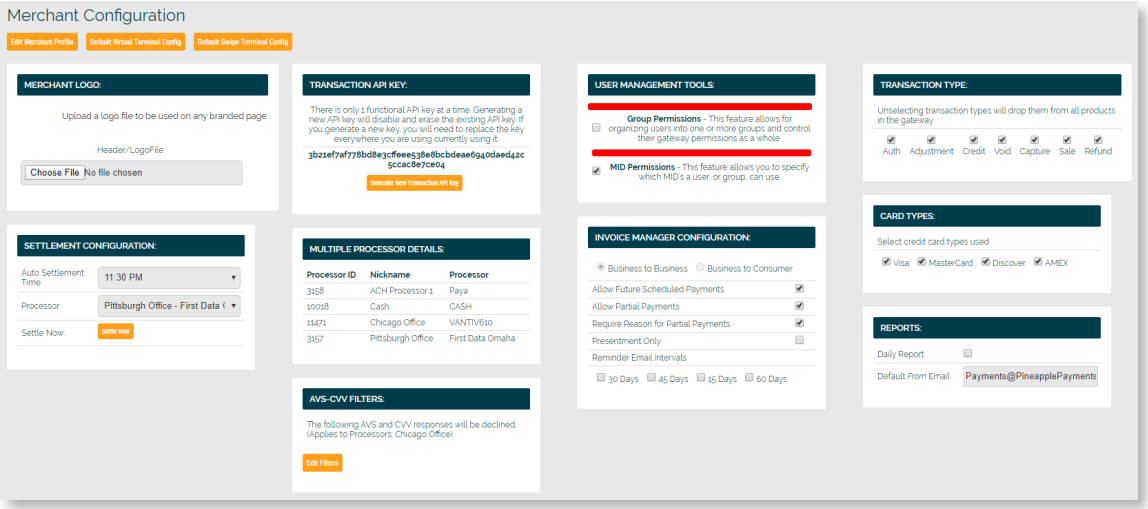
You will need to receive your Welcome Email from Pineapple Payments to gain access and get started. The email will include your Login Credentials.

1. Customize Your Giving Experience

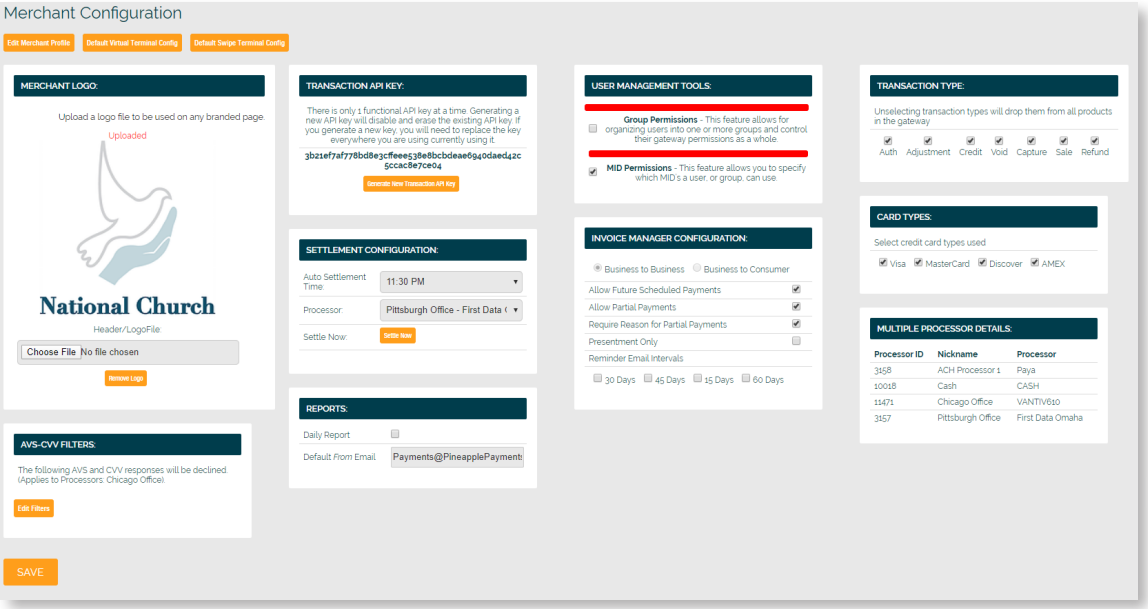
Upload Your Logo

Upload your logo to customize Hosted Giving Pages with your brand. This simple option expands your church's branding visibility and helps donors feel more secure as they recognize your logo.

1. Login to your Pineapple account.
2. Hover on the "Settings" tab towards the top of the page.
3. Click on "Merchant Configuration".



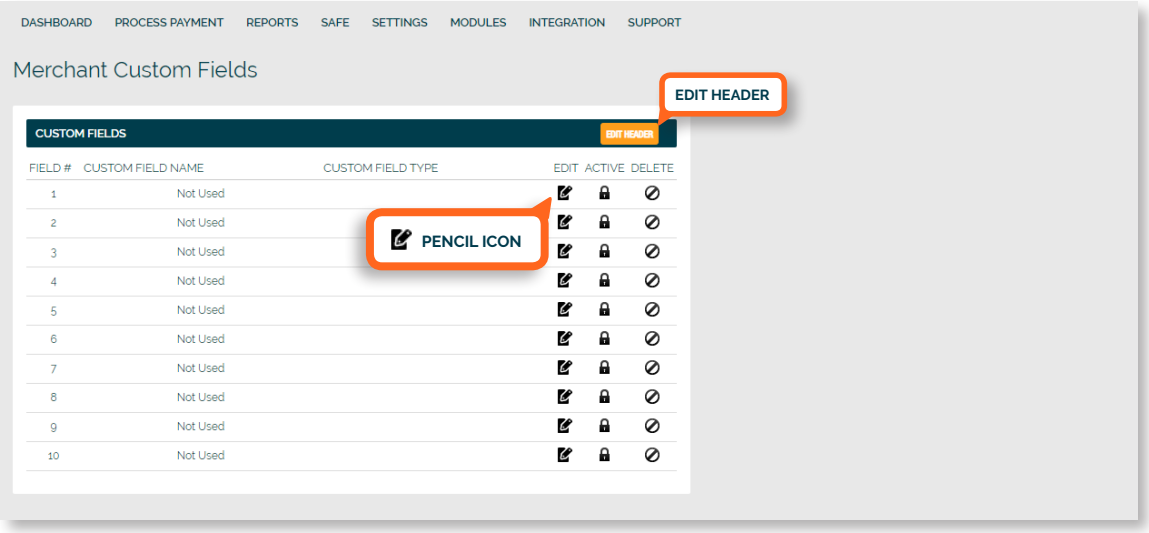
4. Find the "Merchant Logo" tile and click "Choose File" to upload your logo (must be jpeg or png format).
5. Click the "Save" button at the bottom of the page.
6. You're done! Your logo is successfully uploaded.



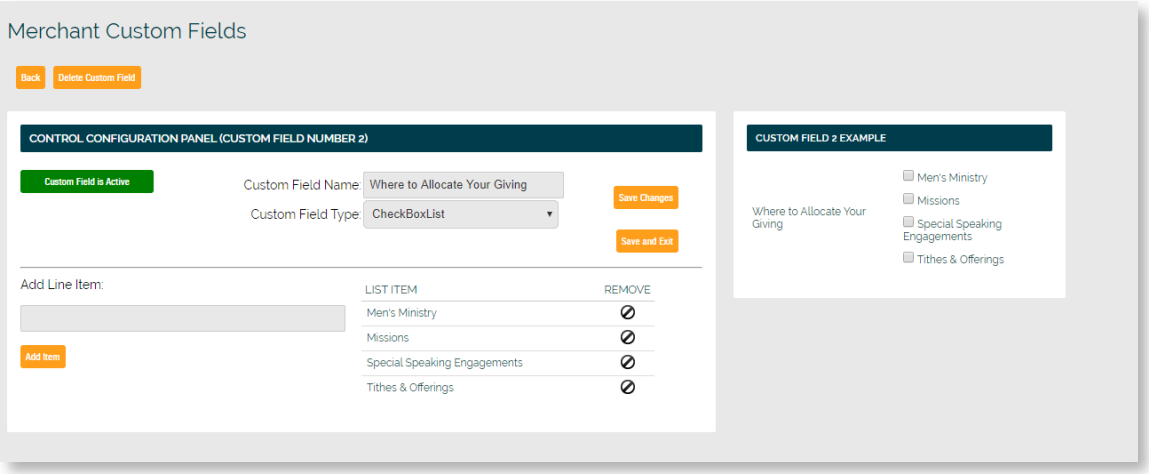
Create Your Custom Fields

Create up to 10 custom fields and use them to collect unique and important data from your donor. Custom Fields can be used at every point of payment interaction as well as used to search, find, or track donations using reporting tools.

1. Hover on the "Settings" tab towards the top of the page.
2. Click on "Custom Fields".
3. Click on the "Edit Header" button to rename your Custom Field category. Select the pencil icon next to each field to "Edit" and customize to your needs.



4. The "Custom Field Name" is the text that will appear next to the field to describe it.
5. The "Custom Field Type" is the type of format you will use to control data input. This includes Textbox, Drop-down lists, Check-box lists, and Radio button lists.
   a. Need a Custom Field like "Parish I.D. Number"? Use a textbox.
   b. Need a Custom Field with a pre-determined list of selections? Radio button and Drop-down lists work great for single selections. Checkbox list works great for multiple selections.
6. Click "Save & Exit" to create each field.

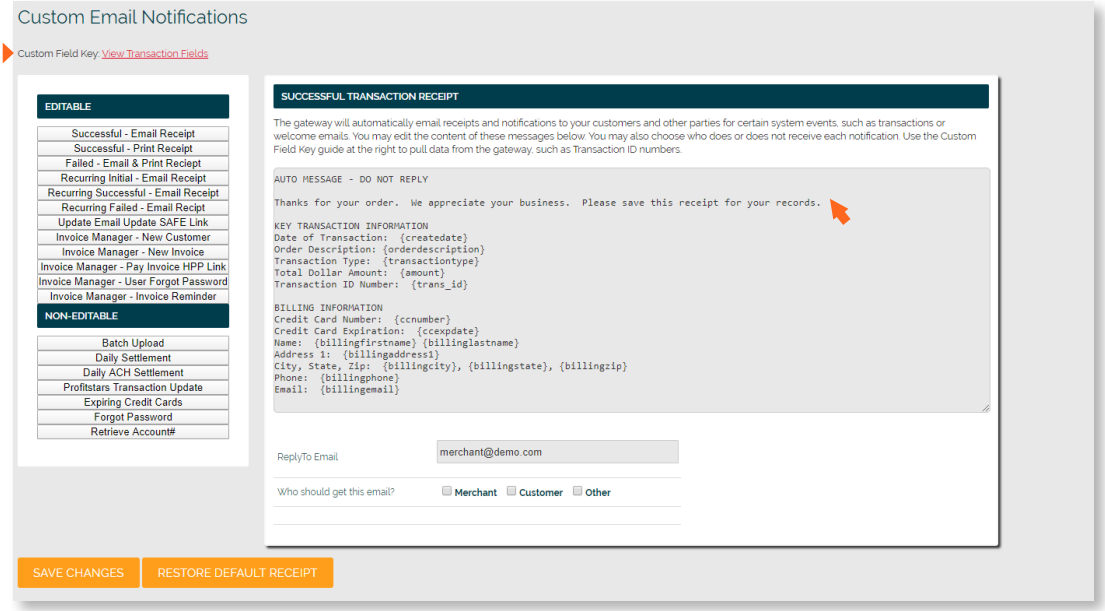


7. View your Custom Field creations. You can add, edit, and remove them over time.
8. That's it! You're done.,

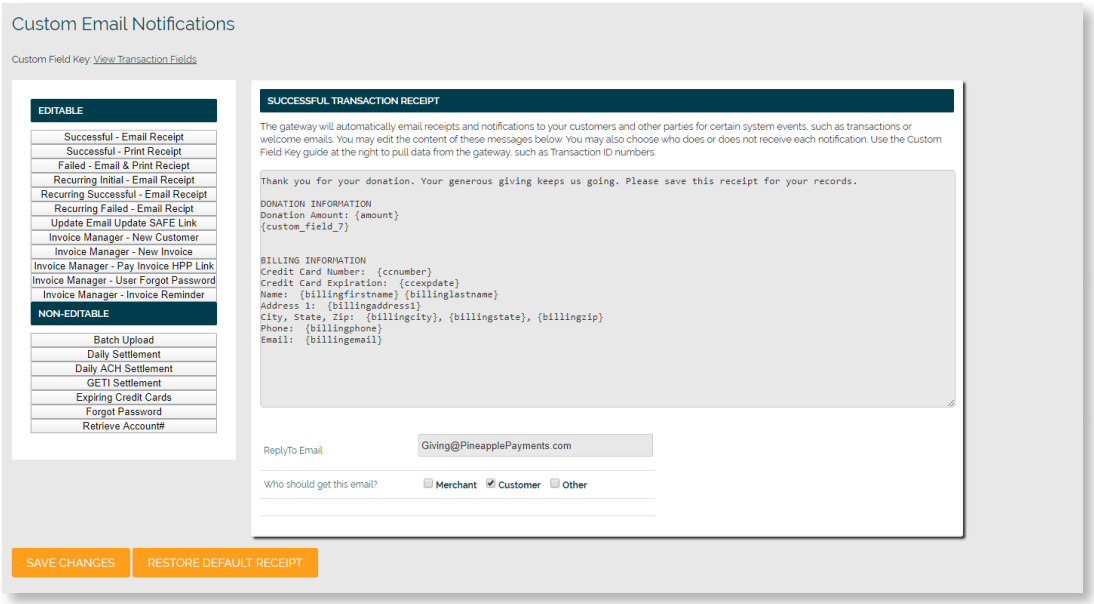
Customize Email Receipts

Skip this section if you wish to use our standard email receipt template or follow these simple steps for customizing the email receipt notifications that go out automatically after a transaction.

1. Hover on the "Settings" tab towards the top of the page.
2. Click on "Custom Email Notifications".
3. Review "Editable" receipt templates.



4. Each email template allows for customization of the message and audience.
   a. Put your cursor in the gray box to edit message content.
   b. Decide who receives the email and where replies should go.
5. Want to add your Custom Field data? Use the Custom Field Key.
6. Click "Save Changes" at the bottom of the page.
7. You're done! Review your customized receipt.

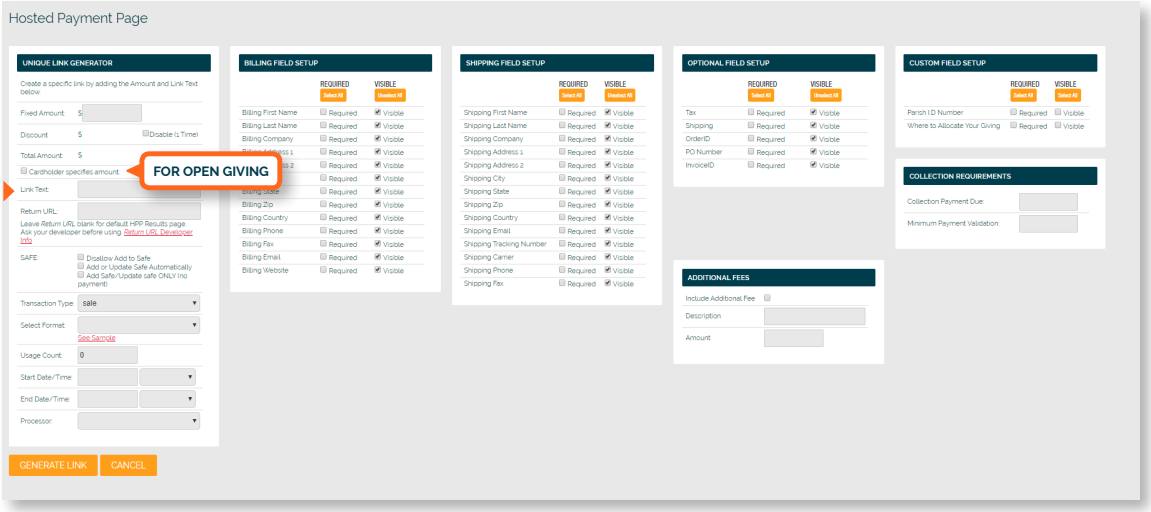


2. Set Up & Share Your Giving Page

Set Up Your Hosted Giving Page

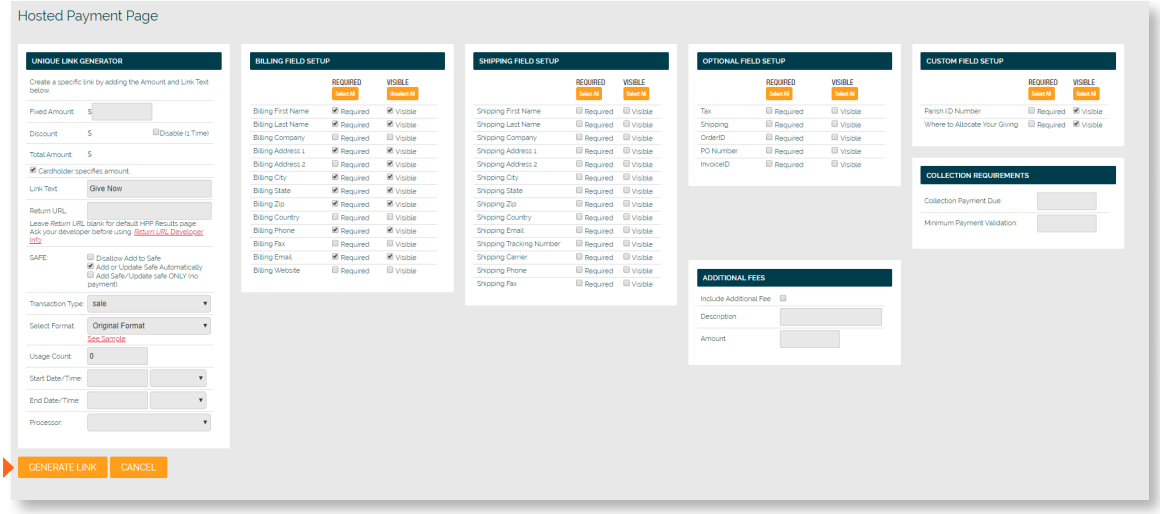
Hosted Payment Page (HPP) is a simple and secure payment page hosted by Pineapple Payments. HPP empowers donors to choose their giving amount and enter payment information for quick online giving.

1. Hover on the "Modules" tab towards the top of the page.
2. Click on "Hosted Payment Page".
3. Select "Add New Hosted Page" button to create your page.
   a. There's no limit to how many pages you can create. Create one HPP for tithes & offerings and another HPP to sell event tickets! The options are endless.
4. Configure your preferences from the "Hosted Payment Page creator".



5. For open giving, check the "Cardholder specific amount" box and enter your Statement Descriptor in the "Link Text" field.
   a. Your Statement Descriptor could be something as simple as "Give Today", "Give Now", or "Giving Amount".
6. SAFE can be used to save the donor's payment information on file for Recurring Giving. Review PT.3 of this guide for more information.
   a. For One-Time Giving only, check the "Disallow Add to Safe" box.
   b. For Recurring Giving, check "Add or Update Safe Automatically".
7. Choose preferred format. Select "See Sample" to see differences in page design.
8. Complete your Field Setups. Define what billing, shipping, optional, and custom information you want to collect from your donor.
   a. **Required:** To make a field required, check both the "Required" and "Visible" boxes next to that field.
   b. **Optional:** To make a field visible optional, you must only check the "Visible" box next to that field.
   c. **Hidden/Not Used:** To hide a field, you must uncheck both the "Required" and "Visible" boxes next to that field.

9. Review your setup. It should look something like this.

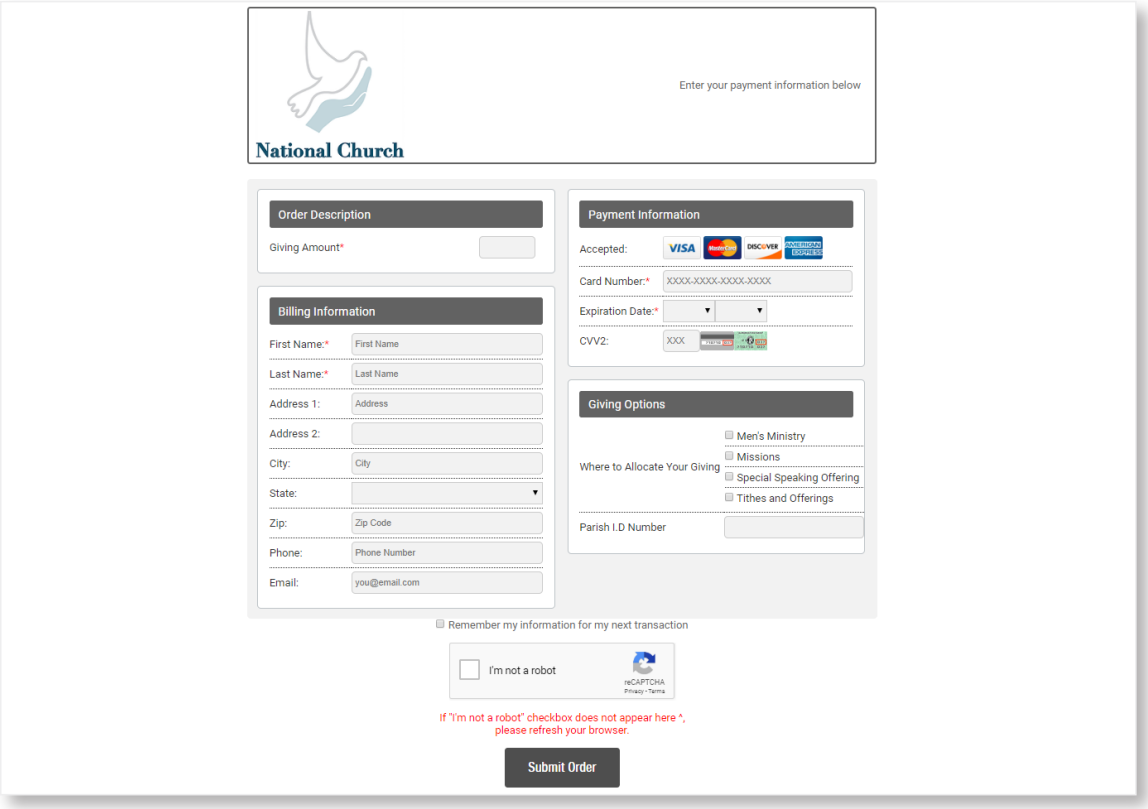


10. Click the "Generate Link" button to create your page.

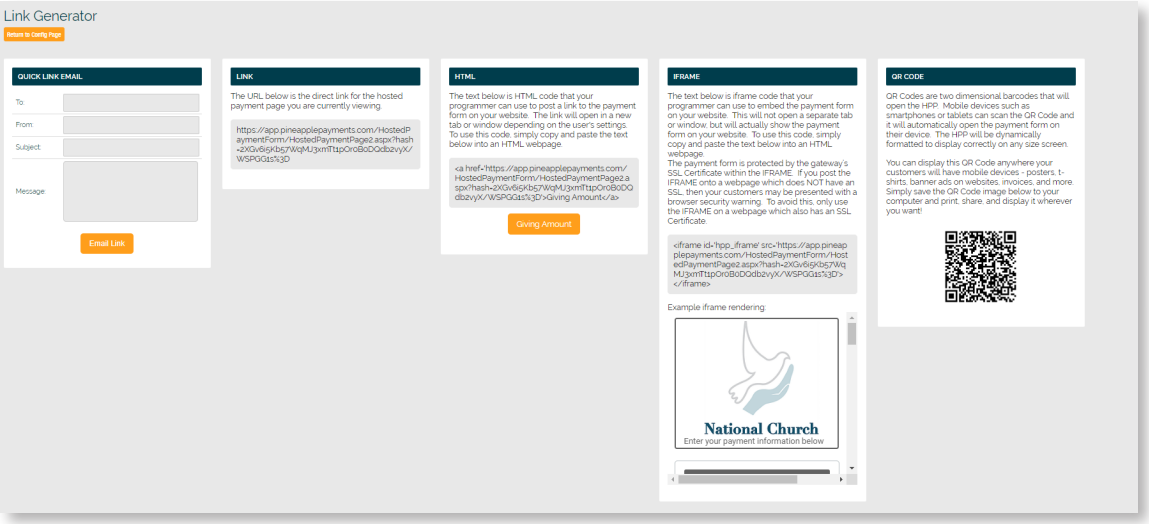
Share Your Hosted Giving Page

There are many ways to share your page with your customers. Simply Copy, Paste, and Share.

1. Immediately after creating your Giving Page, you're routed to our "Link Generator".
2. If you need to get back to "Link Generator" in the future, hover on the "Modules" tab, select "Hosted Payment Page", and choose "View".
3. Copy the link and paste it into a new window to view your page.



4. There are 5 different ways to share your page.
   a. **Quick Link Email –** Our system will email the unique page link to your customer.
   b. **Link –** This is your unique page URL. Share it the same as you would share any other link – email it, post it to your webpage, etc.
   c. **HTML Code –** This is a snippet of code you can share with your programmer/developer. This will generate a giving button to your website.
   d. **IFRAME Code –** Similar to the HTML code, this is a snippet of code that you can use to connect the page to your website. Instead of creating a button, IFRAME will embed the page into your site.
   e. **QR Code –** A unique QR Code is generated. Use this on flyers, business cards, posters, etc. Your donors simply scan the code with their phone and your page is automatically linked.
5. Choose how you want to share your page and that's it! You're done!



3. Enable Recurring Giving

How Recurring Giving Works

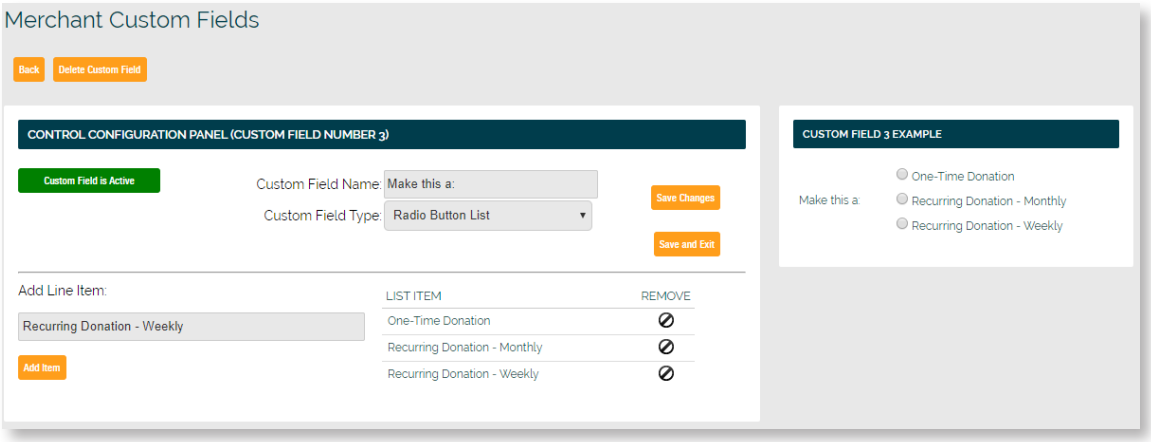
Recurring Giving is an optional feature, requiring manual setup. You can skip this step if you choose to collect one-time donations only. This section outlines how the recurring process works and the manual process involved when storing a donor's payment information for use on Recurring Giving.

1. Donors cannot create their own Recurring Giving plans. However, you can securely store a donor's payment information and enroll them into Recurring Giving.
   a. Recurring Giving plans must be setup individually for each donor.
   b. Recurring Giving plans can be established for any schedule (daily, weekly, monthly) or amount.
2. To enable the option of Recurring Giving, you must:
   a. Add recurring fields to your Giving Page.
   b. Enable SAFE on your Giving Page.
   c. Review your SAFE list and create Recurring Giving plans for those donors.

Add Recurring Fields to Your Giving Page

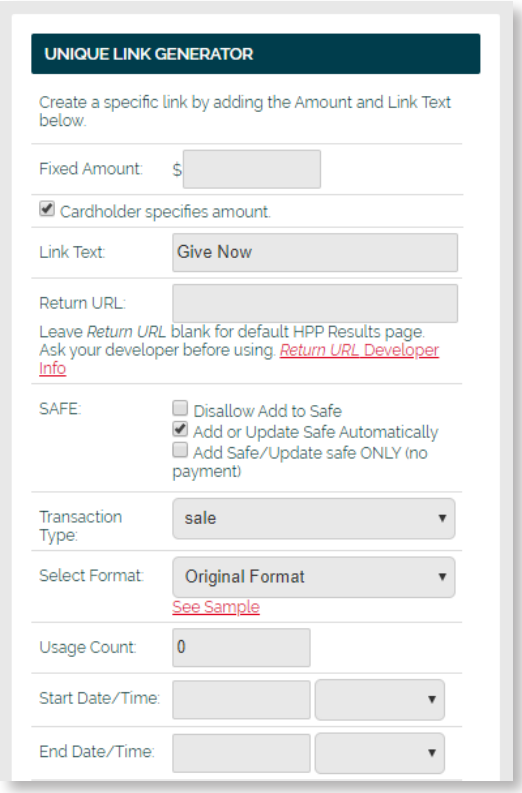
Create custom fields to collect Recurring Giving information. Add those custom fields to your Giving Page.

1. Hover on the "Settings" tab towards the top of the page.
2. Click on "Custom Fields".
3. Click the "Edit" icon next to a "Not Used" field to create new fields for Recurring Giving.
4. Create fields to collect data for Recurring Giving. This could include a radio button field asking the donor if they'd like to give one-time, weekly, monthly, etc.

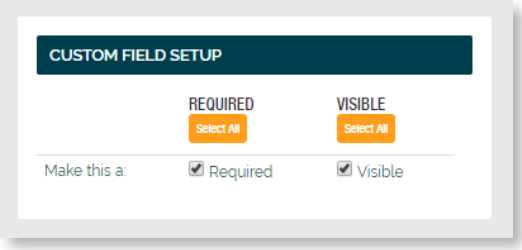


5. Once you've created your custom fields, you must add them to your Hosted Giving Page.
6. Hover on the "Modules" tab towards the top of the page.
7. Click on "Hosted Payment Page" and select "Edit" to update your Giving Page with recurring data fields.

8. Check the "Add or Update Safe Automatically" box in the SAFE section.



9. Check the boxes next to your recurring custom field to display it on your page.



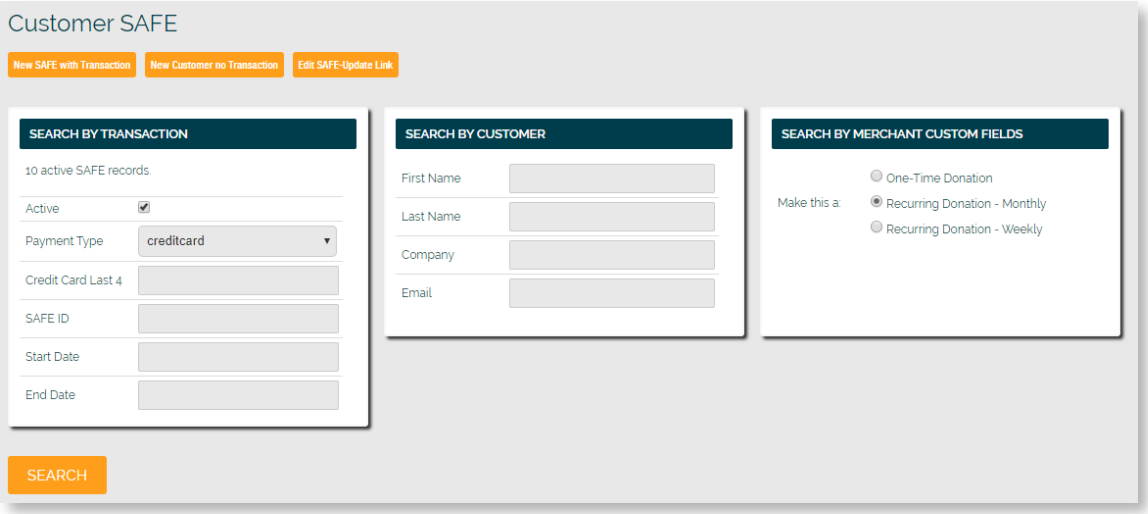
10. Click the "Update Link" button. That's it!

11. Read on to see how you can create recurring giving plans for the donors that have opted to repeat their donations.

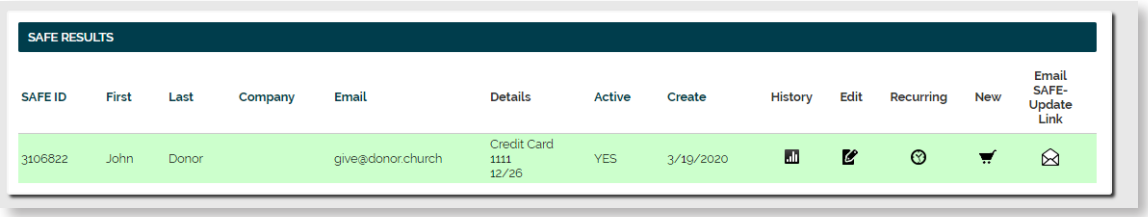
Create Recurring Giving Plan

Once you've enabled SAFE on your Hosted Giving Page, you can find the customers that have stored their payment information for Recurring Giving.

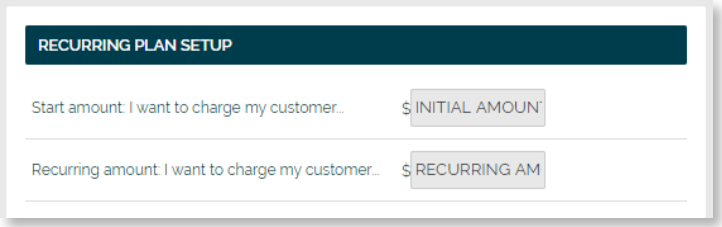
1. Hover on the "Safe" tab towards the top of the page.
2. Click on "Manage Safe".
3. There are various filters you can use to search for your donor. You can search for any donor using the search criteria. *Tip: Search for donors using your Recurring Giving Custom Field criteria. This will allow you to see what type of giving your donor opted for.



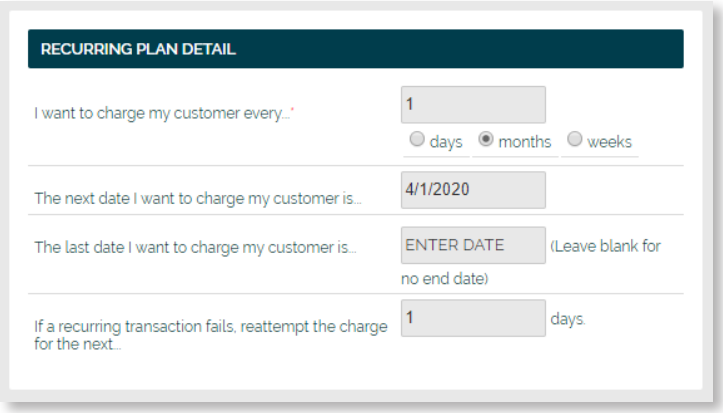
4. After clicking "Search", review your SAFE results. You'll see a list of donors, including the "Create" date they enrolled.
5. Click on the "Recurring" icon next to a donor to create their Recurring Giving plan.



6. You will be routed to the "Recurring Plan Information" page. Designate the Recurring Giving schedule for your donor on this page.
7. The first tile to complete is "Recurring Plan Setup".
   a. **Initial Amount:** This amount only runs one-time, immediately when the recurring giving plan is created. If an Initial Amount doesn't apply, enter $0.00.
   b. **Recurring Amount:** This amount is the recurring donation amount that will run automatically according to the designated schedule.



8. The second tile to complete is "Recurring Plan Detail".
   a. **I want to charge my customer every:** Designate how often the plan will run (i.e. every 1 month, every 1 week, etc.). Enter in the Quantity and then select your appropriate frequency (months, weeks, days).
   b. **The next date I want to charge my customer is:** Choose when recurring giving will begin.
   c. **The last date I want to charge my customer is:** If applicable, choose when recurring giving will end. If you do not have a specific end date, leave blank.
   d. **If a recurring transaction fails, reattempt the charge for the next ___ days:** In the case of a decline or payment failure, this feature allows you to have a recurring transaction reattempted automatically. We will stop auto-retrying until either the number of retries has exceeded OR successful payment is collected.



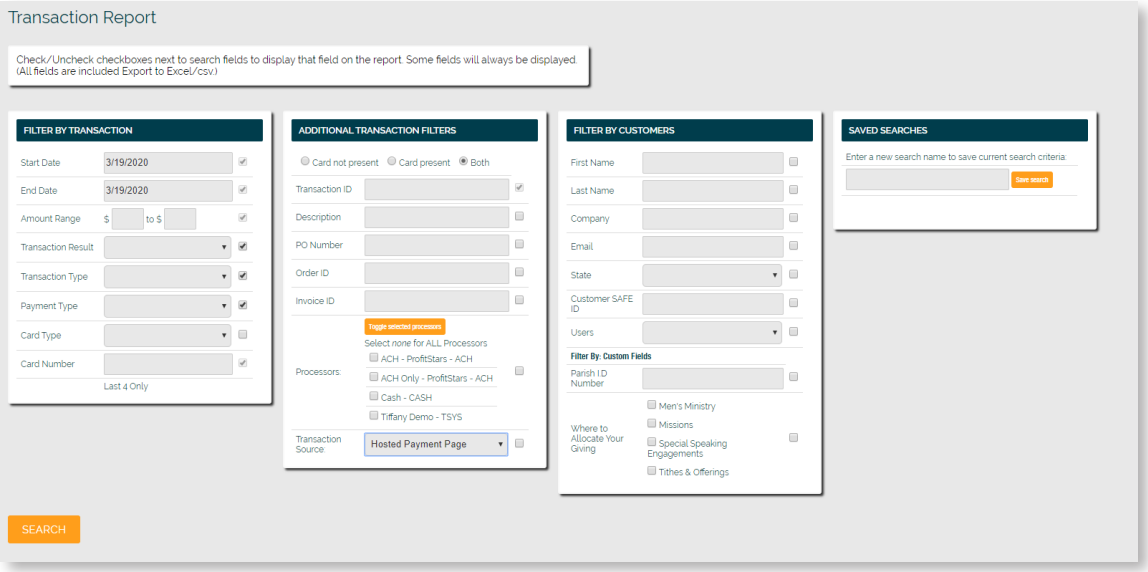
9. Click the "Create Plan" button to finish. That's it! You're done. Future giving for this donor will be automatic.

4. Track Giving With Reports

Search Transaction Reports

Now that you've created your Giving Page and shared it with donors, how do you track your incoming donations? Our Transaction Report is a great tool to use!

1. Hover on the "Reports" tab towards the top of the page.
2. Click on "Transaction".
3. There are various filters you can use to narrow down the specific transaction(s) you're looking to view. Use the Transaction Source filter of "Hosted Payment Page" to track donations from your Giving Page.



4. Click the "Search" button to see a summary of your Transaction Report results.
5. Want to see details? Click the "Magnifying Glass" icon to view transactions individually, per transaction, or see all transaction details by clicking the "Export – Excel" button.