Step-by-step instructions

CREATING AN ACCOUNT

- **Benefits of creating an account:** Selecting the option to create an online giving account allows you to review your online giving history and manage any recurring transactions you may have. In the future you will be able to select "Login" to tie your future gifts to your online giving account.
- **To create an account:** enter your e-mail address, choose a password and re-enter the password to confirm. Passwords must between 6 and 16 characters in length, include uppercase and lowercase letters, numbers (0-9) and a special character: ~ ` ! @ # $ % ^ & * ( ) _ + - = < > , . { } [ ] | \ " ' ? /
- **Security hint:** If you forget your password, the security hint you select and answer you provide will give you access to the "Reset Your Password" page.
- **Billing address:** Enter the billing name, address and phone number for the checking account or credit card that will be used.
- **Create account:** Click the "Create Account" button to continue to the giving page. A message at top will say "You have successfully logged into your account. This transaction will be associated to your history."
- A **confirmation e-mail** will be sent to the e-mail address provided. You can log back in anytime with your e-mail address and password.
- Check spam folders if you do not see the confirmation shortly after creating your account. Add the address **info@donatelinq.net** to your safe senders e-mail list to prevent DonateQ messages being treated as junk mail.
- Click the **Logout** link to sign out when finished using DonateQ. For best security, close the web browser window.

LOGGING IN & CHANGING PROFILE

- **Login** with the user name (e-mail address) and password you selected when the account was created.
- **Forgot your password?** Click the "I forgot my password" link on the login screen. Enter your e-mail address and click the Next button. Answer the security question and click Next. Check your email for a message from **info@donatelinq.net**. The subject will read: Password Reset. Follow the instructions provided in the e-mail to complete your password reset
- **Navigation**
  - **My Account** - Set or update your contact and account information; password, security question, address, phone and e-mail address.
  - **Manage Transactions** - Review your previous gifts, or manage any recurring or future transactions you may have scheduled, cancel a pending transaction.
  - **Give Now** - Go to our giving page and set up a one time or recurring transaction.
  - **Help** - Provides you with assistance for whatever page you may be looking at. For example, if you were looking at "Manage Transactions" clicking on "Help" will

provide you with assistance for that page. Select an option from the menu above to get started!

MAKING A GIFT

- From EAPE's DonateQ landing page, click the **Give Now** button.
- **Designate your gift** from the "Please select one" drop-down box.
- In the box at right, **enter the dollar amount** of this gift.
- Enter the **billing address**.
- Check the box if you want to run the transaction on a **future date**. Select the month and date on the calendar.
- If desired, check the box to make this a **recurring transaction**. Select the payment frequency (weekly, monthly, etc.) and duration (run for three months, one year, indefinite, etc.).
- **Payment method**: Click the radio button to select payment via electronic check (for electronic funds transfer from a savings or checking account) or credit card (Visa, MasterCard, American Express and Discover are accepted). **Note: Electronic check provides the best use of mission dollars by minimizing processing costs.**
    - **Electronic check**: Enter the name as it appears on your checks, choose Check Type (personal or corporate), Account Type (checking or savings), Bank Name, Account Number and nine-digit Routing Number. *Carefully check for correct data entry.*
    - **Credit card**: Enter the cardholder's name as it is printed on the credit card, the Card Number *without spaces or hyphens*, then select the expiration month and year from the dropdowns. Select the card type and enter the CSC # (three-digit number from the back of Visa, MasterCard and Discover; four-digit number on front of American Express).
    - If you chose to run the transaction at a future date, note the following:
        - We want you to be aware of how the initial authorization of your transaction may affect the available balance of your account and to explain that funds will not be withdrawn from your account until the scheduled date of your transaction has been reached.
        - Once you submit your transaction an authorization is requested from the issuing bank on your card for the amount of your payment (For Example: Your debit or credit card is issued by Bank of America. Bank of America will provide an authorization that would approve or decline your transaction). If your transaction is approved the issuing bank may hold the amount of your transaction in anticipation of your payment. In most cases, after 3-7 business days the initial authorization would "drop" from your account and these funds would return to your available balance. Once the scheduled date of your transaction has been reached your transaction will process and your payment would be withdrawn from your account (usually within 48 hours).
- In the text box, please leave any comments you wish to make. If you selected "other" from the "Please select one" drop-down box, please specify the ministry or program to which you have designated your gift here.

- Click "Next" and review the details of your gift. To change any of this information, click the "Edit Transaction" button. Your gift(s) will not be processed until you enter the Captcha code shown (case sensitive) and click the "Confirm Transaction" button.
- A confirmation screen includes your transaction ID number. A receipt is sent to the e-mail address entered in the gift's billing address section.

VIEWING YOUR HISTORY AND CHANGING SCHEDULED GIFTS

- Login to your account and select Manage Transactions from the menu. Enter a date range or transaction type and click the Find Transactions button.

- To manage a particular transaction click "Select" next to the transaction. Depending on the "Status" of the selected transaction you can: View Details, Duplicate, Edit or Cancel the transaction. See Help for more explanation on transaction status or the transaction management options.