

FEBRUARY 2020 FEATURE RELEASE FOR WESHARE

Transactions with WeShare Just Got Easier

WeShare is excited to announce new enhancements to the add/edit transactions for special and second collections — all in an effort to give you the best online giving experience possible.

Schedule a Transaction: Second Collections

WeShare Admins now have the ability to schedule parishioner transactions within second collections.

1. Log in to your admin panel and go to Manage Users.
2. Search by first name, last name, or email.
3. Click on the user name to open their account.
4. Under Second Collection, click on Donate button.
5. Any second collections that are not already set up as a recurring donation will appear.
6. Enter a giving amount.
7. Choose to divide the entered amount, apply the entered amount evenly to all second collections or key in different amounts.
8. Attach an existing payment source or add a new one.
9. Confirm changes by checking the Authorize Transaction box.
10. Click Donate.
11. You will be taken to the Scheduled page for the second collection.

Account	Name	Next Transaction	Payment Source	Amount	Frequency	
Giving Scheduled	All Saints Day	Sun, 11/1/2020	Checking Tri City Bank	\$20.00	Annually	Edit Delete
	All Souls Day	Mon, 11/2/2020	Checking Tri City Bank	\$20.00	Annually	Edit Delete
	Holy Thursday in April	Thu, 3/19/2020	Checking Tri City Bank	\$20.00	Annually	Edit Delete

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Edit a Scheduled Recurring Transaction: Collections & Second Collections

Now WeShare Admins can help parishioners edit recurring transactions for collections and second collections, such as revising donation amounts or changing withdraw dates.

1. Log in to your admin panel and go to Manage Users.
2. Search by first name, last name, or email.
3. Click on the user name to open their account.
4. Click on Payment Sources.
5. Under Giving or Second Collection, click on Scheduled.
6. On right side of the page, click on the option to Edit the Recurring Transaction.
7. Click on the Edit button.
8. Make your changes.
9. Confirm changes by checking the Authorize Transaction box.
10. Click Save.
11. The changes will display on the Scheduled page.

Edit Scheduled Transaction

Giving Opportunity
All Souls Day

Payment Source ⓘ
Checking Tri City Bank

Amount ⓘ
\$20.00

Start Recurrence ⓘ
Mon, 11/2/2020

Recurrence ⓘ
 Give Annually

Cancel Save

Name Malissa Folker Status Active

Account

Contact Info

Payment Sources

Your transaction was successfully submitted.

Add a New Payment Source: One-Time Donation

Did a parishioner recently switch banks? Do they have a new debit card? Whatever the reason, adding a new payment source to regularly scheduled donations is a breeze.

1. Log in to your admin panel and go to Manage Users.
2. Search for a user by first name, last name, or email.
3. Click on the user name to open their account.
4. Under Giving or Second Collection, choose to make a one-time donation.
5. Click on Donate.
6. Find the Giving Opportunity.
7. Fill out the required fields.
8. Confirm changes by checking the Authorize Transaction box.
9. Click Donate.

Annunciation Parish
Acct: 20-0888

Dashboard / Manage Users / User Details

Name Malissa Folker Status Active

Account

Contact Info

Payment Sources

Giving Management

Manage Giving Opportunities

Giving

Scheduled

Donate

Second Collection

Scheduled

Donate

Giving Opportunity
Maintenance & Repair

Payment Source ⓘ Add Payment Source

Tri City Bank | Checking
Checking Account ending in *555 Replace

Donation Type
One Time Scheduled

Donation Amount
\$5 \$10 \$25 \$50 \$75 \$100 \$200 \$500 Enter Custom Amount

Comment
Entered comments here to reach out to site admin.

Confirmation
 Authorize Transaction
By checking "Authorize Transaction" you agree that the transaction details are correct and are authorizing this transaction.

Donate

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Engagement Library

Easily find hundreds of templates to promote online giving at your parish. Includes flyers, bulletin articles, postcards, brochures and more.

1. Log in to your admin panel.
2. Go to Engagement.
3. Click on Engagement.
4. Click on Engagement Library.
5. Select a folder.
6. Click to reveal subfolders and/or related documents.

