

USER GUIDE

Using GivingTools online giving is easy. It's so easy to use GivingTools that the directions are really short. The next page provides an index of what you need to do.

The GivingTools interface itself also includes plenty of cues. Have a question at any time (or an idea on how we can make your giving experience even better)?

Just drop us an email: support@givingtools.com



HOW DO I...

HERE'S HOW!

Set up my account

You don't need to set up an account to give on our platform. Just make a gift. Your giving history is tied to your email address.

Give

There are several ways charities can communicate giving opportunities ("appeals") through our system. Some appeals are graphical; some look more like a list. Appeals may appear in the charity's site or they may be accessed on a page hosted by GivingTools. Regardless of how appeals look or where they are, the same process for giving applies:

1. Click on the appeal that interests you.
2. Complete the fields you see. Click "Select" when done.
3. If there are other appeals on the page that interest you, click and complete those, too.
4. To make edits, click on the appeal again, change your selections, and click "Confirm."
5. Click the "Next" button at the bottom of the page.
6. Answer Additional Information questions, if you see any.
7. Complete your Contact Information. If this is your first time checking out, enter your email address. Then enter your contact information. If this is not your first time checking out, the system should recognize you.
7. Enter your Payment Method.
8. You will now see a Summary of your giving for this session.
9. Click "Finish" to complete your session.

Change Email, Password, or Contact Information

1. Log in. Visit givingtools.com/login. Enter your email address and your password. (Forgot your password or never created one? Click "Forgot Password" to reset it via email.)
2. If you give to multiple charities through GivingTools, use the pull-down to select the one you'd like to edit.
3. In the My Account window, click Settings to change your email address, password, or contact information.

View Giving History

Once logged in, you can also click the Gifts Tab to see your giving history over a selected period. Send yourself a tax receipt summary of giving if you wish.

Cancel a Recurring Gift

To cancel a recurring gift, simply click Cancel under the gift in the Gifts tab. You cannot change the amount of a recurring gift. To do that, cancel the gift and give afresh.

Change Payment Methods

To delete or add a payment method, click Payment Methods. You will see your current payment methods and can delete some, or you can add more. Then click Gifts to associate your recurring gift to the new method.