

# shelbynext<sup>®</sup>

## Giving

## Overview

Created with the most commonly requested features to help inspire and manage your online giving, ShelbyNext Giving combines all the tools you want to engage your congregation as well as easy to use features to manage and organize your giving. Key elements include recurring giving, text giving, reports and PCI Level One Security to ensure the safety of both you and your members data.

*ShelbyNext Giving helps your organization make online giving easy for your members by offering:*

- Quick and Easy Setup - as little as 24 hours
- No contracts or minimums
- Friendly accessible customer support
- Three plans to choose from
- Several giving options - web, text, kiosks, card readers & mobile apps
- Donor funds in your account in 2-3 business days

## ShelbyNext Giving Standard Features



### Recurring Donations

It is easy to set up automatic recurring donations. Your members can select the frequency, dollar amount, date and total number of installments. A more even distribution of giving throughout the year helps to smooth out seasonal giving slumps, improving cash flow and allowing you to forecast more accurately.



### Detailed Donation Reports

With access to hundreds of reports, our reporting feature offers another great benefit for administrators, detailing not just donation amounts, but also giving trends, month-to-month comparisons, and high and low giving months. All of these details are presented in easy to understand graphs and charts.



### Organizational Branding

All of our donation solutions can be customized with your logo, colors and images to ensure members feel more secure making donations to an organization they trust.



### Email Receipts

Donors immediately receive email receipts for each donation they make to your organization, allowing them to track their giving for their own records. This email can be customized with your own "Thank You" message so that all of your donors feel appreciated.



### More Giving Options

ShelbyNext Giving makes it possible to reach more people in more ways with simple donation solutions. Between our options of online giving, a mobile giving app, kiosks, card readers and text donations, everyone has the opportunity to give. With easy access available, donors can make an impulse gift or respond to a request for donations in real time.



### Pledge Goals

ShelbyNext Giving's software allows donors to set pledge goals towards your organization and track their progress. It can also send email alerts if they are not progressing well. This is a great way to get people involved in a specific campaign or funding goal within your organization.

**ShelbyNext Giving Standard Features** (cont.)**Customer Service**

ShelbyNext Giving has excellent customer service, support, and availability included in all three of our pricing plans. If you need custom reports, if you need to fix or make edits or even if you just have a question, we are here to help.

**Data Import / Export**

ShelbyNext Giving's intuitive admin control panel is a comprehensive donation solution. Quickly and easily import/export data from Excel, CSV files and QuickBooks. Our tools currently integrate with SiteOrganic.com and future integrations are planned.

**Member Payment Profile**

We speed up the giving process for donors by allowing them to create multiple payment profiles, keeping them from having to enter the same information repeatedly. Instead, donors can simply log in to their account and choose a previous method of payment.

**Anonymous Giving**

We also offer an anonymous giving feature! Everyone can make donations without creating a profile or logging in, so they can feel secure in their donations.

**Secure Transactions**

We take privacy seriously and utilize advanced security systems designed to keep your data and your donors' data safe. Our system is fully PCI Compliant and meets or exceeds all PCI Data Security Standards, ensuring your sensitive information is safe from any unauthorized transactions.

**Accepts Debit/ Credit/ ACH**

ShelbyNext Giving's portal accepts all forms of electronic payment. We can also limit this to just debit or check cards and e-checks (ACH) depending on your organizational needs.

**ShelbyNext Giving Additional Feature Options****Kiosk**

Kiosk Giving is an optional add on to your online giving tool with ShelbyNext Giving. Our iPad kiosks are a timely donation solution that helps remove barriers to giving. By providing an on-site kiosk, you expand your base by adding people who do not carry checks or cash. More first-time donations are made using a giving kiosk than with any other method! Additionally, the reporting from kiosks is integrated into the control panel. All donations are processed directly to your bank account.

**Text Giving**

Text Giving offers members one of the easiest and quickest ways for them to tithe. For just \$5 a month and with no contract, you will receive a dedicated phone number for your texts at the same rate as your normal giving plan. The process takes just a few minutes to set up your account and once completed your church is able to receive gifts via text. Your congregation receives a custom receipt created by you from your control panel. It's that easy.

**Card Readers**

Card Readers allow your church to accept credit cards anywhere! Whether you have a more mobile operation in your organization, need it for events that keep you in different areas of your church or just like the ease of a giving tool that is as mobile as your members, card readers offer an affordable, on-the-go solution for your Giving.

**How long does it take to get set up with ShelbyNext Giving?**

We can get you set up very quickly! Your Merchant Account application usually takes 3-4 business days to be approved. Once that has occurred, you should be able to start accepting donations within 24 hours.

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## Frequently Asked Questions

### What is ShelbyNext Giving?

ShelbyNext | Giving supplies the giving software and financial tools needed to help ministries and organizations thrive. Since 1976, Shelby has been a leader in providing software to churches, parishes, denominational headquarters, independent ministries and development organizations. There are 24,000 users who are currently supported all over the United States and in several foreign countries.

### How do I use ShelbyNext Giving?

Your church or organization can easily create different funds or different projects, thus your donors have control over where their giving goes, and of course these can be accessed through all of our platforms at any time. One example of this is where a church sets up a relief fund for disaster or a summer camp/ retreat in addition to the main church fund. Or a nonprofit that manages several charities can set up funds for each one. Since our system is so flexible, how you use it is completely up to you. We have created a demo for you to have full access to the product and understand how it operates. For a demo of how ShelbyNext Giving works, go to <http://www.shelbysystems.com/giving/demo.html>.

### What types of payments can ShelbyNext | Giving accept?

We accept Visa, MasterCard, Discover, American Express Cards and Personal Checks (ACH/ e-checks).

### Who handles my donations?

ShelbyNext Giving never has access to the giving dollars made through our system. All donations are securely processed and go directly from the donor's account to your church or organization's bank account.

### Will I be charged additional fees for items like more funding categories or different types of reports?

ShelbyNext Giving will never charge you for additional categories, personalizing your system, or the number of donors you have. We provide many data reports at no cost. If you do require different types of reports or statistics, contact us to discuss pricing details. We build custom reports ourselves, and while we are happy to do anything we can to help you, occasionally these do require additional fees.

### Will I be charged if the transaction fails for insufficient funds?

Since credit and debit card payments are real-time validation, the transaction would fail immediately and there would be no charge. ACH (e-check) requests, however, are not verified immediately. If an ACH request returns for insufficient funds, our ACH merchant account provider charges you \$3.00. ShelbyNext Giving does not charge for non-sufficient funds.

### What if someone disputes a transaction?

We take our security seriously and will do everything in our power to help you determine whether or not someone has made a fraudulent withdrawal. If the transaction is found to be illegitimate, we can immediately suspend the account and will launch an investigation of our anti-fraud procedures. You will also be able to issue a credit back to the owner of the account, which is easily done through the administrative section of our payment gateway.

ShelbyNext Giving's portal is able to accept all forms of electronic payment. We can also limit this to just debit or check cards and e-checks (ACH) depending on your organizational needs.

There is less appeal for criminals to commit fraud through donation systems because there are no products for sale. Thus, the greatest fraud threat is typically a low-value transaction from criminals to validate credit cards. If the transaction goes through, then they will take the card elsewhere to purchase products or services. Because this is not using information from our system, this type of fraud will not affect your members. However, it can affect your organization through the transaction fees and time spent crediting and voiding these requests. ShelbyNext Giving has a process to help limit fraudulent transactions. Our payment gateway uses a service called MaxMind. MaxMind prevents activities from IP addresses that are blacklisted or coming from Russia. We are also working on limiting access to only IP's in the US and Canada, and disallowing Anonymous Proxy users.

**We will likely have to enter the EFT giving into our financial software much like our check and cash donations. Is it possible to download ShelbyNext | Giving data into a compatible file format for our own financial software?**

Absolutely! All of your data from ShelbyNext | Giving can be downloaded into a .CSV file, which is compatible with most financial software packages. If you are having trouble importing the file into your software, we suggest you contact support for the specific software package you are using.

**We would like to try ShelbyNext | Giving with a few people within our organization to begin with, so that we have some in house experts before launching it to the rest of the organization. Is this possible?**

Yes! You are definitely able to do that. We do everything we can to get you set up quickly.

**How long does it take to set up ShelbyNext | Giving?**

We can get you set up very quickly! Your Merchant Account application usually takes 3-4 business days to be approved. Once that has occurred, you should be able to start accepting donations within 24 hours.

**Does ShelbyNext | Giving work with other types of transactions besides donations and giving?**

You have total control over which categories are set up within your administrative portal on ShelbyNext | Giving. You can accept payments for any type of transaction by setting up specific funds, such as retreat registration, building funds or registering for classes.

**Can we allow donors to set up recurring donations?**

Yes, and it is easy to set up a recurring donation through our online portal. Donors have complete control over the donation amount, frequency and date withdrawals are made from their accounts. They can even set up multiple recurring donations that are deposited into separate church funds.

**When donations are made through ShelbyNext Giving, how soon will the money be in my account?**

Transaction times vary slightly depending on the type of transaction. Credit and debit card donations are deposited nightly, but ACH (e-check) donations may take up to four days. This delay is due to the fund verification process that most banks use. This does not happen with cards because they are instantly verified. Funds from text donations typically settle in your account in 2-3 days.

**Are virtual terminals available with ShelbyNext | Giving?**

ShelbyNext | Giving offers secure virtual terminal and batch upload options, enabling merchants to process card or ACH transactions manually. These features are accessed through an online merchant interface. Transactions are immediately submitted for authorization and processing each day.

**How secure is my account information?**

We are fully committed to providing you with the most secure environment for your sensitive data. The only payment data that is stored in our system is for recurring payments. Any other card information is deleted immediately after the transaction is processed. Thus a relatively small percentage of donors' information is stored, and all sensitive data (for both single transactions and recurring gifts) is secured using a 256-bit transaction encryption process. In addition, card companies (Visa, MasterCard, Discover and American Express) and Merchant account providers are held to the highest security standards, giving you an extra layer of protection.