

# Instructions on Adding a Pledge/Making a Gift

1. Now that you have a login to Access ACS, you can add a pledge and make a gift directly from your profile. When you login, you will see the overview screen.



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2. Click on the Pledge Now button. That will bring up the pledge screen.
3. To add a pledge for the following stewardship year, fill out the pledge information form. Enter in your pledge amount, select the General Fund, set the frequency to once a year and **change the start date to 1/1/2016 and the end date to 12/31/16**. If you click Save, it will take you back to the overview page. If you click Save and Setup Online Gift, it will take you to the online giving page.

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**Add Pledge**

Enter the Pledge information below

I pledge  to  to be given

from  until  for a total pledge of \$0.00

[Save](#) [Save and Setup Online Gift](#) or [Cancel](#)

Once a pledge has been saved, it cannot be edited online.

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4. To setup an online gift, you can click the Save and Setup Online Gift button when you add your pledge which will bring you the screen on the next page:

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Give Now **My Scheduled Giving**

### My Scheduled Giving

New Gift Details

Give 5,000.00 to General Fund optional memo + add more

Frequency: One time (dropdown menu open showing: One time, Once a week, Every two weeks, Once a month, Twice a month, Every three months) On 1/1/2016

Payment Details

Account Nickname

Account Type: Credit/Debit Card

Account Number [input field]

Expiration Date: 09 / 2015

Billing Name: Annabeth Tokin

Billing Address Line 1: 123 E Franklin St

Billing Address Line 2: [input field]

Billing City: Chapel Hill

Billing State: North Carolina

Billing Postal Code: 27514

Email Address: upcch@upcch.org

**Schedule Gift** or Cancel

5. On this page, you have the option to set up recurring gifts throughout the year. You set the amount and frequency and date. Then fill in the account information below and click the Schedule Gift button. You'll receive an email confirming the setup of your recurring gift.

You also have the option to save the account information for future use

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**Give Now**

**Pledge Now**

6. To give an online gift from logging in to your profile, click the Give Now button on the overview page

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My Profile **My Giving History** My Pledge History

Annabeth Tokin

123 E Franklin St Chapel Hill, NC 27514 USA 919-555-2102 upcch@upcch.org [View Map](#)

For Year: 2015

Total YTD Giving: \$0.00

**Give Online**

Contribution Information

Show: [10 Most Recent Contributions](#) [Show All](#) [During Date Range](#)

There are no contributions for the selected date range.

Please note, recent online contributions may not appear until the transaction has been processed.

Or the Give Online button on your My Giving History and My Pledge History profile tabs.

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My Profile **My Giving History** My Pledge History

Annabeth Tokin

123 E Franklin St Chapel Hill, NC 27514 USA 919-555-2102 upcch@upcch.org [View Map](#)

Contact Info Personal Info Serving

Contact Information

Annabeth prefers to be contacted by phone call. **Change Preference**

Phone Numbers

Home (Preferred)

919-555-2102

7. The Give Now screen breaks it down into steps unlike the My Scheduled Giving page which has everything on one screen. **\*Note: You can access the My Scheduled Giving page by clicking that tab.**

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Give Now My Scheduled Giving

Gift Funds Payment Method Review & Process Receipt

1 2 3 4

How much would you like to give? ex: 50.00

How often would you like to give?  One Time  Recurring

When would you like to give? 9/16/2015

[Continue >>](#)

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8. After filling out the amount and date, click the continue button and that will bring you to this screen. You can fill in the amount for each fund and can add something to the description line if desired.

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Give Now My Scheduled Giving

Gift Funds Payment Method Review & Process Receipt

1 2 3 4

General Fund  Optional Description

Building Fund

**\$0.00 of \$500.00 Remaining**

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Give Now My Scheduled Giving

Gift Funds Payment Method Review & Process Receipt

1 2 3 4

Save for future use

Account Type

Account Number

Expiration Date  /

Name on Card

Billing Address Line 1

Billing Address Line 2

Billing City

Billing State

Billing Postal Code

Email Address

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9. Now you are ready to enter your account information. Once you hit continue, you will have the ability to review your gift before you process it. A receipt will be emailed to you once you have completed the process.