



# Quick Start Guide

## New Login Instructions

1. Go to <https://giving.ncsservices.org/cp/>
2. Bookmark this new address for easy access in the future
3. Historically, administrators logged into NCS e-Giving with unique usernames. **On the new platform, you will login using the email address associated with your profile and your current password.**

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## Next Steps

We recommend logging into your current account (legacy system) and export/download your batch reports for this year. While your donors' transaction history will transition to the new platform, these exports will be a reference for how these historical transactions were paid out to you.

Follow the steps outlined below to log into the new platform. You will need to locate your new giving page URL and send a copy of it to your webmaster so they can update the link(s) on your website. This is important as your current giving page is not compatible with the new platform.

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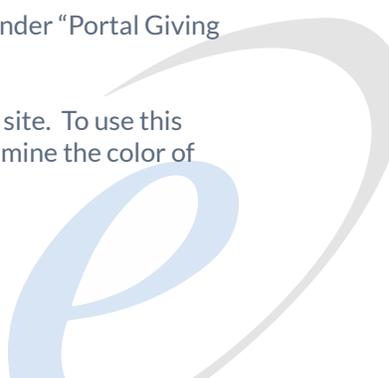
## Your new Giving Page Link: This is a critical step

Follow the steps below to locate the new link to your giving page. Provide this to your webmaster so they're able to replace the existing links on your site. **It is important that all previous links to your giving page are updated to the new link:**

1. Click on "Organization" in the top navigation, then click on "Settings" in the drop-down.
2. Once on the Settings page, find "Integration Code" under the "Important Links" box. Click on "Integration Code" to access this page.
3. Here you are presented with two options to link to your new giving page:

**Option 1:** Links directly to your giving page. To choose this option, copy the link under "Portal Giving URL" and send this to your webmaster.

**Option 2:** Provides the HTML code to embed a widget of your giving page to your site. To use this option, choose whether you want the widget to open in a new window, then determine the color of your Giving Button. Copy the HTML code and send it to your webmaster.



# Adding & Editing Donation Funds

You can add as many different funds as you want with no additional cost.

1. Click on “Organization” in the top navigation, then click on “Fund Management” in the drop-down.
  2. Once on the Fund page, click on “+ Add Fund” and add the name of the new donation fund for your organization. “Fund Name” is the only field that is required on this pop-up, and then save your changes.
  3. Click the “Action” drop-down next to an existing Fund Name to find options to edit or delete the fund.
  4. Any changes to this Fund Management screen will update on your giving page real-time.
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# Deposit Reconciliation – Nice and Easy!

1. Click on “Reports” in the side menu, then click on “Deposits”. From here, you are able to search for deposits sent to your bank by date range and then view the transactions that make up each of your deposits by clicking on “Show Details” next to each deposit.
  2. Another option is to click on “Reports” in the side menu, then click on “Canned Reports”. Under the “Other” section you can click on “Batch Deposit Report”.
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# Manage & Refund Transactions

1. Locate a donor’s transaction & process a refund by clicking on “Reports” in the side menu, then click on “Transactions”.
  2. Search for the donor by first or last name.
  3. Click the “Action” drop-down next to the donor’s profile to find options to view their transactions, resend email receipts, issue a partial or full refund and update their stored payment methods.
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# Recurring Donations

**Recurring transactions will continue uninterrupted.**

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# Fees

**Your organization’s monthly plan fee and processing rates will not change.**



## Donor Profiles and Access

Donors' profiles have been converted to the new platform. You'll want to notify your members that there is a new version of eGiving and to expect a new look & feel when they go online to give. Donors will visit your new giving page from your website

Same as administrators, your donors historically logged into NCS e-Giving with unique usernames. **On the new platform, donors will log in using their email address associated with their profile and their current password.**

**One of the largest feature requests we received from our customers was to open up access to their donors' accounts so churches could directly support their donors when needed. We are happy to provide this functionality in our new release. Visit the "Donor" menu to locate your donors and use the "Action" drop down found next to the donor record for more options.**

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## Customer Help Desk & Support

The link to your support resources is found in the top navigation bar. Click on "Support" to access the following:

**Help Desk:** When you have a question, go to the help desk and search for an answer. Many of the common questions you will have about the new platform will be addressed here.

**Support:** Instead of sending an email to support, you will open a support case here. Your request will go directly into our Support Team's ticketing system for assistance. You can view your current and past support requests here. You can also update any existing case as needed until it is resolved.

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## Tutorial Videos

Click the below links to watch our instructional videos.

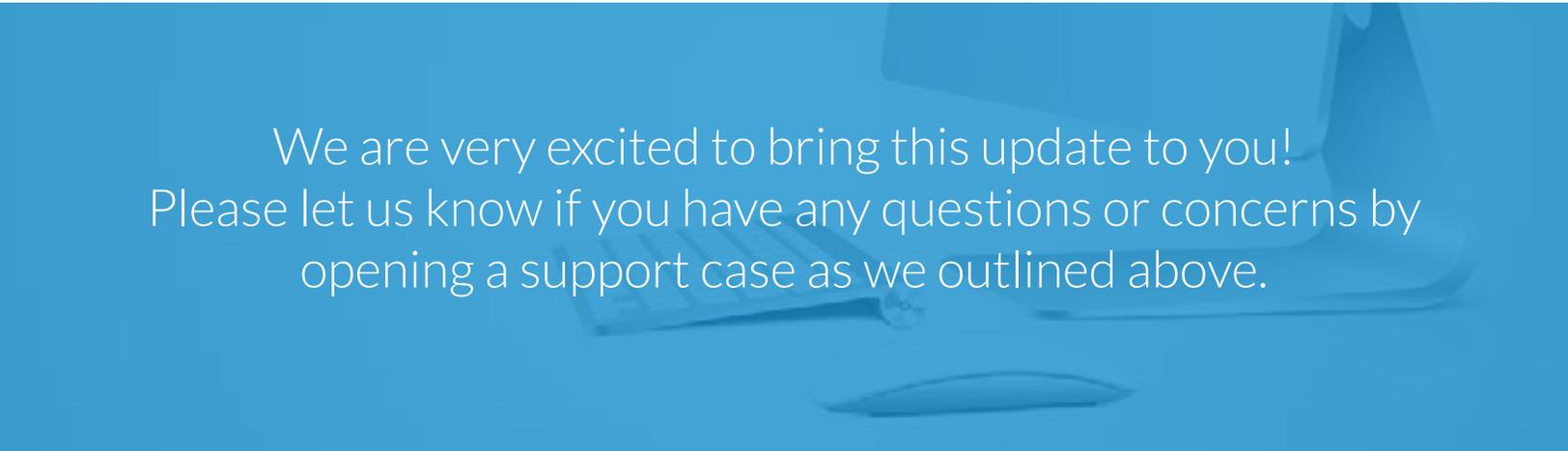
**Settings & Fund Management:** <https://vimeo.com/221321481>

**Organization Drop Down Options:** <https://vimeo.com/221323388>

**Giving Page & Giving Settings:** <https://vimeo.com/221325373>

**Dashboard, Reports & Donors:** <https://vimeo.com/221326417>

**Resources, Help Desk & Support:** <https://vimeo.com/221324437>



We are very excited to bring this update to you!  
Please let us know if you have any questions or concerns by opening a support case as we outlined above.