

INSTRUCTIONS ON SIGNING UP YOUR CHURCH WITH TITHE.LY



CBOQ has negotiated a special rate/features with Tithe.ly for CBOQ churches:

- Includes web, app, kiosk giving and easy recurring giving
- Able to give to multiple giving funds within same transaction
- OPTIONAL – add cash/cheque donations to manage complete donation reporting
- OPTIONAL – add text giving for just \$9 USD/month (with free 90-day trial)
- Ability to collect all data needed for Income Tax Receipting (full address, phone, etc.)
- Ability to create Canadian Income Tax Receipt PDFs
- Option to include a 'MEMO' field for gifts in memory/honour of another
- **Special Credit Card Transaction Rate is just 2.5% + .15**
- Option for donor to cover fees (included in tax receipt amounts)
- Coming Soon – Electronic Fund Transfer (EFT)*



Step One: Get familiar with Tithe.ly

Start by reviewing [Tithe.ly features](#) and the [Definitive Guide to Mobile Giving](#).

You will need to assign a Legal Representative. Your legal representative is the main contact for your Tithe.ly account, for instance, treasurer, head secretary, envelope secretary, board member, or pastor (CBOQ would not recommend this) etc Before you begin the signup process, make sure you have the following ready:

- your business number,
- bank routing info, and
- your list of giving categories (for example: General, Missions, Building, etc.).
- valid photo ID for your legal representative.

* You may see references to ACH on the Tithe.ly website. This is the equivalent of EFT and is not available in Canada yet.

Step 2: GO TO SIGNUP PAGE

To ensure your church receives the special CBOQ rates, Tithe.ly has created a [CBOQ Registration page](#).

After you have completed the signup process, make sure you change the settings to ensure you are capturing the address, phone and memo fields needed to issue income tax receipts. Instructions are included below under: AFTER YOUR ACCOUNT IS CREATED

You should also make sure your church website is ready for Online Giving. Instructions are included below under: GETTING YOUR CHURCH WEBSITE READY FOR ONLINE GIVING

Step 3: CHURCH INFO

- **Church Name** – the name that people will find your church with in a search
- **Church phone**
- **Church Website**
- **Church Address** (as you start to enter the church address, google maps should show a list of addresses – please check the correct google maps address as this is used to geo-locate your church within the giving app.)
- **Giving Funds** – enter your church’s giving funds – i.e. General; Tithe; Missions; Building; etc. (you must enter at least one giving fund, but you can change/add/delete later)
- **Church Banking Info** (routing info from the bottom of a church cheque)

Then press the “**ADD MY CHURCH**” button

Step 4: BANK INFO

You must enter the church banking routing information. This is the account is where Tithe.ly will deposit all funds.

In addition to validating the church with the church Business Number and banking information, Tithe.ly also needs to validate your legal representative. The form will ask for this name, date of birth and their Social Insurance Number.

PLEASE NOTE, under no circumstances should you be obligated to provide SIN # for security/validation purposes. CBOQ and Tithe.ly has created a work around for this. **You will have the choice** of using the last few digits of your SIN or leave this field blank and upload a photo or screenshot (.jpg or .png) of a valid form of government issued photo identification (example: drivers license, passport, etc.)

To complete the process, press the “**FINISH!**” button at the bottom of the screen.

AFTER YOUR ACCOUNT IS CREATED...

Once you have created a Tithe.ly account for your church, [login](#) and set up the following features:

- Click on “**MY CHURCHES**” from the left-hand menu
- Under the Organization Settings column, click on “**EDIT ORGANIZATION**”
- To ensure Tithe.ly captures the necessary information for income tax receipting, you need to scroll down and check the following boxes:
 - “ask for an **address** when somebody gives”
 - “ask for a **phone number** when somebody gives”
 - “add a **memo field** to the giving form”
- If you have a Church Management Software (ChMS) select it if it is on the drop-down list. This will allow you to integrate Tithe.ly’s online database with your ChMS. If it is not on the list, you will need to export the data as a CSV file.
- If you need to add/change Giving Types, scroll down to the bottom of the page and Enter the new Giving Type into the blank box, or press the “ADD ANOTHER ITEM” to create a new blank box. Then press the “**SAVE**” button. You should double-check to make sure this was added.
- Sign up for Text to Give. You get a three-month trial and after that it’s \$9 USD/month. You can add and remove this feature anytime.

Now you are ready for **Getting your Church Website Ready**.

GETTING YOUR CHURCH WEBSITE READY

Tips for Updating Your Church Website to Make an Impact

Your giving page is where your church's vision becomes actionable. Don't overlook this opportunity to engage donors! Plus, if you don't intentionally showcase giving on your website, you may lose givers in a maze of pages, ultimately frustrating their desire to be generous.

If you're a visual learner or want some inspiration, check out these examples of [real churches with awesome websites](#).

Step 1: Make it Easy to Give

Here are some crucial components to an effective giving page.

ADD ONLINE GIVING BUTTON/LINK



- Update your online giving page with your new [Tithe.ly](#) giving button or link. You can find the on-site embed code or direct giving link [here](#).
- Include a simple explanation that helps people understand what they can do. For example:

"To make a secure, one-time or recurring gift, click the button/link. For enhanced security and giving simplicity, create an account by clicking on the login/signup link in the top right corner."

What's the best part about it? People who give online never leave your website! Keeping people who want to give on your website not only builds trust and confidence in the giving experience, but it makes the process simple, secure and fast (statistics show that 80% of givers stop the process if it takes longer than 30 seconds).

Don't hide the give button! Make sure you place the Give button in an easy to find spot on every page to make for a great giving experience, with the fewest number of steps as possible.

What if your church does not have a website? Donors can still give to your church using tithe.ly by logging in and selecting your church at: <https://tithe.ly/give>. Or your church can setup a giving KIOSK in the lobby of your church. It uses the same Give Form as the website.

ADD TEXT GIVING INSTRUCTIONS

- Clearly display your church's text giving number + instructions. Say something similar to:

"Securely make a gift by texting GIVE to [YOUR TEXT GIVING #]. You'll be asked to register if it's your first time. Don't forget to save our giving number in your phone! You can always text EDIT to update your information, set up a recurring gift, and check the status of a gift."

- Consider including a [customized rollout resource](#) (slide, how-to video, etc.) on your website.

Step 2: Talk about Security

- Consider adding security information. *All sensitive financial information is stored with the highest bank level security. Your phone number will never be sold, traded, or given to third parties. You will only be texted to confirm your giving.*

Step 3: Cast a Vision

- **Honor the sanctity of giving.** Giving is a sacred space. Make sure your website doesn't treat giving like a *transaction*. Treat giving as an act of worship.
- **Remind your church why we're called to give.** Include your church's giving philosophy. Is there a certain passage of scripture that your church uses about stewardship?
- **Be transparent & celebratory. Share results of generosity.** Transparency builds trust. Trust is the cornerstone of relationships. If you want people to give relationally, it begins with trust. Donors (and potential donors) are wondering, *How exactly is my giving being used? Is it really making a difference? What happened from that special offering last month? Does my church even need my giving?*

Step 4: Add Church Giving Policy

Make sure that your church's **Giving Policy** is included on your site. If not already done, your ***church giving policy should be approved and recorded in the minutes of your Official Board minutes prior to posting.***

A sample giving policy:

Please Note: Spending is confined to Official Church Board Approved funds, programs, and projects. Each contribution will be used as designated by the donor with the understanding that when that particular fund, program, or project has been fully funded or cannot be completed for reasons determined by the Official Church Board, contributions so designated will be used where most needed.

Step 5: Customize your Tithe.ly landing page

Log in as a Tithe.ly admin and go to the "My Churches" section, you'll see a new element titled "brand settings". Click on "edit brand" and you'll be able to do two main things:

- Add your logo and set your primary colours
- Customize your Thank you email