

PARISH GUIDE

# Giving — How It Works

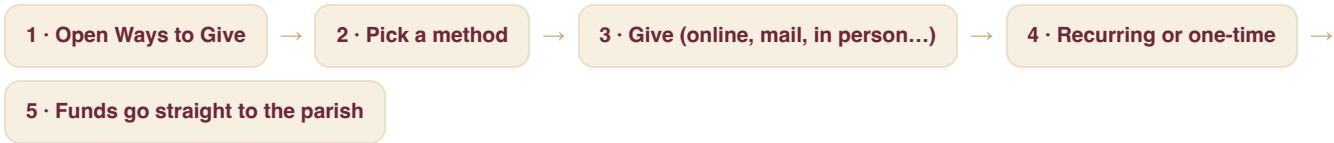
From the collection basket to online gifts — every way to support your parish, in plain language.

A simple, step-by-step guide for parishioners and parish staff · Powered by Nave

# At a glance

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Every parish has a **Ways to Give** page — a single, friendly hub that gathers all the ways someone can support the parish: the collection at Mass, by mail, online, Zelle, even planned gifts like wills and stock. It works out of the box and the office tailors it. **Online card/bank giving inside Nave** (one-time and recurring) is the one piece that switches on only after the parish connects a payout account; until then the page can still point to the parish's existing online-giving link.




**Simple by default, powerful when you need it.** The Ways to Give hub is always there. Built-in online checkout (cards/bank, one-time + recurring) turns on only once the parish connects **Stripe** — money is deposited straight to the parish and Nave never holds it. In this guide, features that depend on that connection are marked **ADVANCED**.

## The two groups of giving methods

The hub sorts every method into two simple groups. A method only appears when the office has turned it on *and* it has the detail it needs (a link, an address, a handle) — so a donor never hits a dead end.

 **Give now**  
Everyday giving. Online (card / bank), at Mass, by mail, Zelle, text-to-give.

 **Plan your legacy**  
Planned & non-cash gifts. Wills & estate gifts (FreeWill), stock & securities, IRA rollover (QCD), donor-advised funds, employer matching, memorial gifts.

**Online giving is special.** When the parish connects Stripe, the "Give Online" card opens a built-in, secure checkout right inside Nave — one-time or recurring, to a chosen fund. Before that, the same card simply links out to the parish's existing online-giving partner. That's the heart of Parts A & B below.

## Part A • For parishioners

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How to find every way to give, give online when it's available, and set up a recurring gift. The Ways to Give page is multilingual, so you're guided in your own language.

### USE CASE 1 • FIND THE WAYS TO GIVE

**Who:** Anyone. **Goal:** See every way to support the parish.

1. On the parish website, open **Give**.
2. Browse "**Give now**" (online, at Mass, by mail, Zelle, text) and "**Plan your legacy**" (wills, stock, IRA, donor-advised funds, matching, memorial gifts).
3. Each card explains the method and gives you what you need — a button to open it, or a detail to copy (a Zelle handle, a mailing address, a contact email).

**Result:** One clear page with every way to give — no guessing where to send a check or find the online link.

### USE CASE 2 • GIVE ONLINE — ONE-TIME

ADVANCED

**Who:** A parishioner. **Goal:** Make a single gift by card or bank. *(Available once the parish has connected online giving.)*

1. On the Give page, tap **Give Online** — it opens the parish's secure checkout.
2. Enter an **amount**, choose **One-time**, and pick a **fund** (e.g. General Parish, School Scholarship) if the parish offers a choice.
3. Add your name and email (or tick "**Give anonymously**"), then continue to the secure payment page to pay by card or bank.

**Result:** Your gift goes **straight to the parish** — your card details stay with the payment processor, never with Nave. You land on a thank-you page.

### USE CASE 3 • SET UP A RECURRING GIFT

ADVANCED

**Who:** A parishioner. **Goal:** Give automatically every week or month.

1. Start the same **Give Online** form, but choose **Monthly** or **Weekly** instead of one-time.
2. Pick your amount and fund, then continue to set up the secure recurring payment.
3. To change or cancel later, use the donor portal from your payment-confirmation email — you stay in control.

**Result:** Steady, automatic support for your parish, with no envelopes to remember.

#### USE CASE 4 · GIVE WITHOUT GOING ONLINE

**Who:** Anyone who prefers cash, check, or another method. **Goal:** Give the way that suits you.

1. **At Mass** — the collection and envelopes during Mass.
2. **By mail** — the card shows the parish's mailing address for checks.
3. **Zelle / text-to-give** — when offered, the card shows the handle or short code to use.

**Result:** No method is left out — the page meets you where you are.

#### USE CASE 5 · PLAN A LEGACY OR NON-CASH GIFT

**Who:** A parishioner planning ahead. **Goal:** Give through a will, stock, IRA, or matching.

1. Open a "**Plan your legacy**" card: a free will & estate-gift partner (FreeWill), stock & securities, an IRA charitable rollover (QCD), donor-advised funds, employer matching, or a memorial gift.
2. Follow the link, or use the contact email the card shows to reach the parish office for transfer details.

**Result:** A clear starting point for thoughtful, tax-smart giving — with the office a tap away for questions.

#### USE CASE 6 · RESPOND TO A CURRENT APPEAL

**Who:** Anyone. **Goal:** Support a specific campaign (e.g. an Annual Appeal).

1. When the parish is running an appeal, a **featured card** sits at the top of the Give page.
2. Tap "**Give to this appeal**" to open the campaign's giving page.

**Result:** The current priority is front and center, so it's easy to give where it's needed now.

## Part B • For parish staff

The office shapes the Give page and (when ready) turns on built-in online giving from two admin areas: **Admin** → **Ways to Give** (the hub itself) and **Admin** → **Giving & Finances** / **Admin** → **Payments** (the Stripe connection, funds, and fees).

### USE CASE 7 • CHOOSE YOUR WAYS TO GIVE

**Who:** Parish staff (Manage giving). **Goal:** Decide what appears on the public Give page.

1. Open **Admin** → **Ways to Give**. Tick the methods to show, under **Give now** and **Plan your legacy**.
2. Fill in each method's detail: the **online-giving link**, a **mailing address** (blank uses your parish address), a **Zelle** handle, a **FreeWill** link (blank inherits your diocese's link when known), a contact email for stock/IRA gifts (blank uses the parish email), and so on.
3. Optionally add a short **note** to any card — written in English, it's auto-translated to Spanish and Tagalog.
4. Use **Featured appeal** to pin a campaign card (link, title, description, image) at the top — leave the link blank to hide it.

**Result:** A polished, multilingual Give page tailored to your parish — methods with no detail are hidden automatically, so there are no dead ends.

### USE CASE 8 • CONNECT ONLINE GIVING (STRIPE)

ADVANCED

**Who:** Pastor or staff (Manage giving). **Goal:** Turn on built-in card/bank giving.

1. Open **Admin** → **Giving & Finances** (or **Payments**) and choose **Connect payouts** / **Connect with Stripe**.
2. Complete Stripe's one-time onboarding, which links **your parish's own bank account** for payouts.
3. Once Stripe reports the account is ready, the status flips to "**Connected — accepting gifts**," and the public "Give Online" card switches to the built-in checkout. Use **Refresh status** if it lags.

**Result:** Donations are deposited **directly to your parish** — Nave is only the platform and never holds your money or card data.

### USE CASE 9 • CREATE FUNDS

ADVANCED

**Who:** Parish staff (Manage giving). **Goal:** Let donors choose where their gift goes.

1. In **Admin** → **Giving & Finances** → **Funds**, add funds (e.g. General Parish, School Scholarship, Mission), each with a name, description, and sort order.
2. Mark a fund **Active** to show it on the giving form; uncheck to hide it without deleting.

**Result:** Donors pick a designation at checkout, and you can see giving broken out by fund.

**USE CASE 10 · WATCH THE GIVING TOTALS****ADVANCED**

**Who:** Pastor / finance (View finance). **Goal:** Keep an eye on online giving.

1. **Admin** → **Giving & Finances** shows totals: **this year, this month**, the number of active **recurring gifts**, and the count of gifts.
2. Below that, the **recent gifts** list shows each gift's amount, fund, frequency, donor (or "Anonymous"), and date in your parish's time zone.

**Result:** A simple finance read at a glance — succeeded gifts only, with their designations.

**USE CASE 11 · TAKE PAYMENTS FOR SACRAMENTS & OFFERINGS****ADVANCED**

**Who:** Parish staff (Manage giving). **Goal:** Collect fees (e.g. a baptism or certificate fee) at request time.

1. In **Admin** → **Payments**, connect the same Stripe payout account, then turn on **Accept online payments**.
2. Optionally tick **Require payment to complete a request** so fee-bearing requests must be paid before they're accepted.
3. Set the actual fees per sacrament in the **Sacrament Catalog**; parishioners pay by card when they submit, and the payment is logged on the case.

**Result:** Sacrament and offering fees are collected online and deposited straight to the parish — alongside donations, on the same connection.

**USE CASE 12 · PASS THE PROCESSING FEE TO THE PAYER (OPTIONAL)****ADVANCED**

**Who:** Parish staff (Manage giving). **Goal:** Net the full fee by adding a convenience fee.

1. In **Admin** → **Payments**, tick **Add a convenience fee** and set the percent and fixed amount (default 2.9% + \$0.30).
2. The page shows a live example — e.g. a \$25.00 fee becomes \$25.93, with \$0.93 shown to the payer as the convenience fee.

**Result:** The payer covers card-processing costs, so the parish receives the full base amount. Leave it off and the fee is charged exactly as set.

# Quick reference

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<b>Where do parishioners give?</b>	The parish website → <b>Give</b> . One <b>Ways to Give</b> page lists every method, sorted into "Give now" and "Plan your legacy."
<b>Is online card/bank giving always available?</b>	No. The <b>Ways to Give hub is always there</b> , but built-in online checkout turns on only once the parish <b>connects Stripe</b> . Before that, the "Give Online" card links to the parish's existing online-giving partner.
<b>Can I give one-time or recurring?</b>	Yes — when online giving is connected, the form offers <b>One-time, Monthly, or Weekly</b> , to a fund you choose. Manage or cancel recurring gifts from your payment-confirmation email.
<b>Does Nave hold the money?</b>	<b>No</b> . Each parish connects its <b>own</b> Stripe account; gifts deposit straight to the parish. Card details stay with the payment processor, never with Nave.
<b>What are funds?</b>	Parish-defined designations (General Parish, School Scholarship, Mission...). Donors pick one at checkout; staff see giving broken out by fund.
<b>What's the convenience fee?</b>	An <b>optional</b> setting (Admin → Payments) that passes card-processing costs to the payer so the parish nets the full amount. Default 2.9% + \$0.30; off unless enabled.
<b>Can we still use our current giving site?</b>	Yes — set your online-giving link under <b>Ways to Give</b> . The "Give Online" card opens it. Native checkout is optional, not a replacement.
<b>Who sees the totals?</b>	Pastor / finance roles, in <b>Admin</b> → <b>Giving &amp; Finances</b> : year-to-date and monthly totals, recurring count, and recent gifts (shown in the parish's time zone).
<b>What languages?</b>	The Give page is multilingual (English / Spanish / Tagalog). Staff write English; notes and labels are translated automatically.

**The big idea:** giving should be effortless and trustworthy. Nave gathers every way to support a parish on one clear page, and — when the parish is ready — adds secure online giving that deposits straight to the parish, with Nave never touching the money or the card data.