



Online Contribution System

User Guide for New Release Making & Managing Contributions For Individual Users and Local Treasurers

Office of the Treasurer
National Spiritual Assembly
of the Bahá'ís of the United States

Version 1.1
September 24, 2021

Welcome to the New Online Contribution System

The Online Contribution System (OCS) is a custom-developed application that offers a complete set of functionalities for accepting and managing online contributions. Its latest release, version 5, is the most significant upgrade since its introduction back in December 2010. The redesign applies to individual users as well as local treasurers. Among the key new and enhanced features in version 5 are:

- 1) Completely redesigned interface with a new look and feel for a better experience making and managing online contributions.
- 2) Dashboard introduced upon login as the point of entry to the most-used functions of OCS.
- 3) PayPal added as the newest method of payment to make a contribution.
- 4) Earmarking of contributions to local funds in many cases.
- 5) Option to set personal goals and monitor progress in real-time.
- 6) Real-time charting of the status of National Fund goal on the dashboard.
- 7) Passages from the sacred writings for reflection.
- 8) Stories about giving for inspiration.
- 9) Quick links (short cuts) to some commonly used functions for easier navigation.
- 10) Responsive design that adapts to desktop, tablet, and smartphone devices.

In redesigning OCS, attention was given to preserving the sacred nature of the experience of giving to the funds as well as ensuring a diverse audience is comfortable using the system.

Contacting the Office of the Treasurer at the Bahá'í National Center for Help

In anticipation of inquiries from users, the Office of the Treasurer has compiled and made available online a set of practical and helpful user guides and training videos for your viewing. For assistance, please contact the OCS support team via chat by clicking on its icon as it appears on the lower-right side of every screen in OCS. While this option is available for a limited time, it is the preferred and recommended way to contact the support team. You may also contact the Office of the Treasurer at the Bahá'í National Center by calling 847-425-7979 or by emailing OCSSupport@usbnc.org during regular business hours (Monday–Friday 8:30 a.m. to 5:30 p.m. Central Time). Additionally, for a comprehensive User Guide and Training Video, please visit: https://um.ocsbahai.org/Quick_Guide.pdf

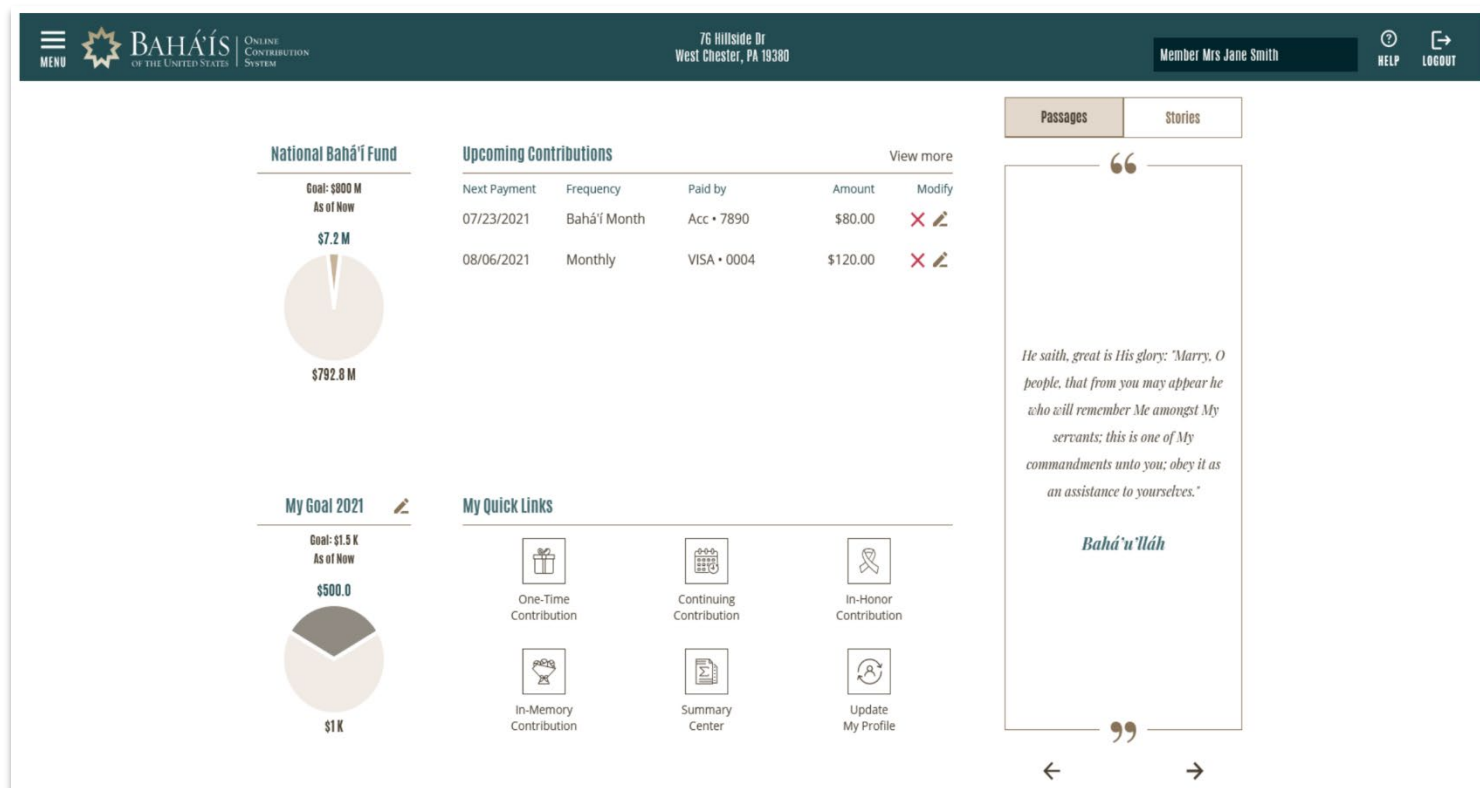
Important note for Local Treasurers using this user guide

This user guide was written primarily with individual users in mind. However, the OCS functions related to making and managing contributions are the same for individual users and Local Treasurers.

A separate user guide is provided for all the additional functions related the work of a Local Treasurer.

Dashboard

The main dashboard, the landing page after you log into OCS, puts all the key functionalities right in front of the users, allowing them to have easy and quick access to these main functionalities and overviews. The dashboard is divided into left, middle and right sections.



The dashboard interface includes a header with the BAHÁ'Í'S OF THE UNITED STATES logo, address (76 Hillside Dr, West Chester, PA 19380), and user information (Member Mrs Jane Smith). The main content is divided into several sections:

- National Bahá'í Fund:** A pie chart showing the goal of \$800 M, with \$7.2 M currently raised, leaving \$792.8 M remaining.
- My Goal 2021:** A pie chart showing a goal of \$1.5 K, with \$500.00 currently raised, leaving \$1 K remaining.
- Upcoming Contributions:** A table listing scheduled payments:

| Next Payment | Frequency | Paid by | Amount | Modify |
|--------------|--------------|-------------|----------|--------------|
| 07/23/2021 | Bahá'í Month | Acc • 7890 | \$80.00 | [X] [Pencil] |
| 08/06/2021 | Monthly | VISA • 0004 | \$120.00 | [X] [Pencil] |
- My Quick Links:** A grid of icons for One-Time Contribution, Continuing Contribution, In-Honor Contribution, In-Memory Contribution, Summary Center, and Update My Profile.
- Passages & Stories:** A section for reading Bahá'í writings, featuring a quote: "He saith, great is His glory: 'Marry, O people, that from you may appear he who will remember Me amongst My servants; this is one of My commandments unto you; obey it as an assistance to yourselves.'" followed by the signature "Bahá'u'lláh".

Contribution Goals and Pie Charts (Left Section)

This new version offers two mechanisms for tracking fund goals. A real-time presentation shows the status of the National Fund goal as set for the current fiscal year by the National Spiritual Assembly. Also, each user may set and track a personal goal. This feature allows you to select one or more funds then set an amount for each of the selected funds as your goal to achieve within a period of your choosing. The system automatically calculates all contributions you have made toward your goal and displays the status, in real-time, every time you log in.

Upcoming Contributions & My Quick Links (Middle Section)

In this section, you can see your next automatic contribution (if you have scheduled one) as well as notifications that may require prompt action, such as updating an expired credit card. You are also able to modify or cancel a continuing automatic contribution. If you click on the “View more” button located on the top of this section, the system will display a detailed listing of received contributions.

Passages & Stories (Right Section)

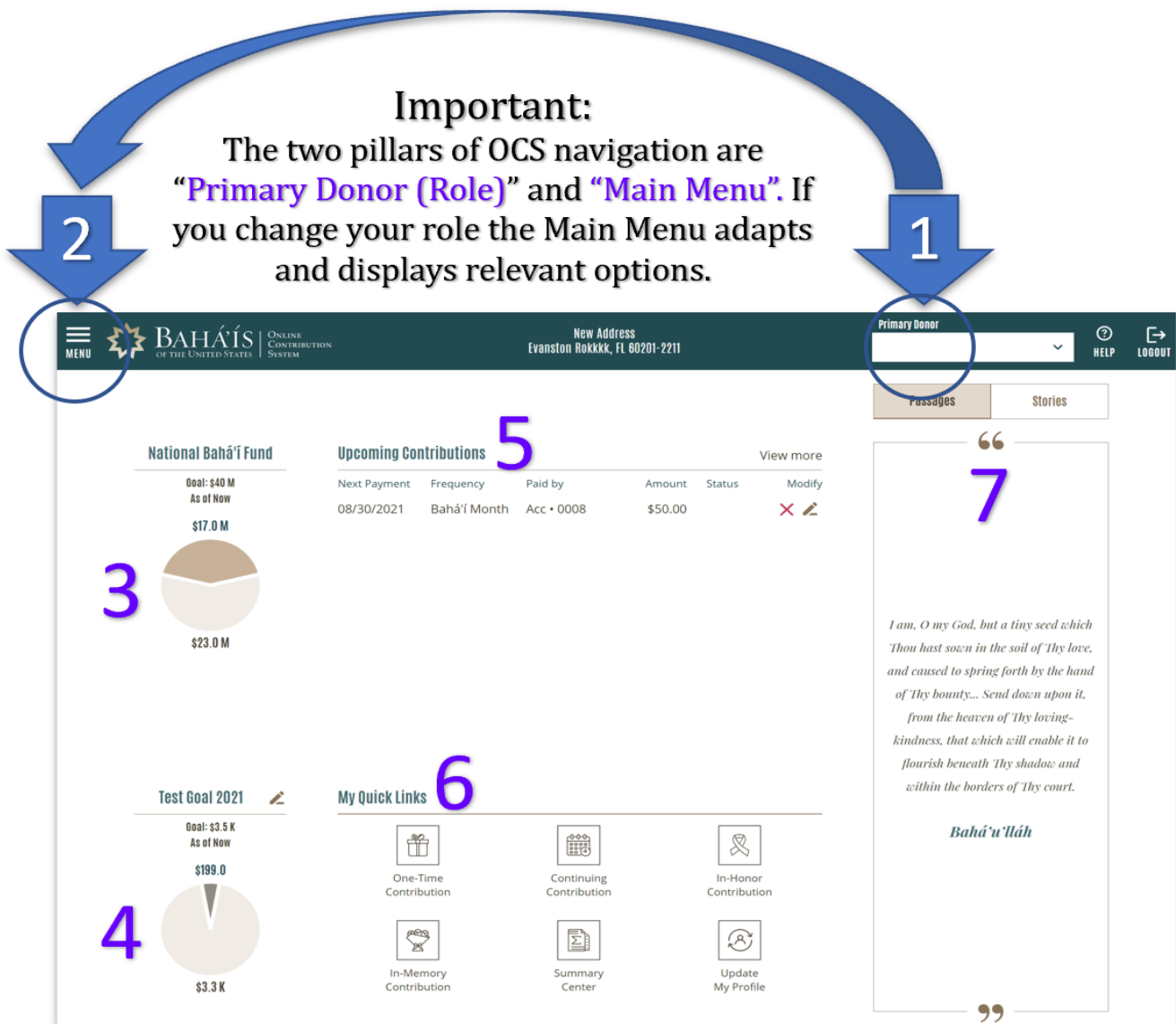
New to version 5 is the option to navigate through and reflect on a set of pre-selected passages from the Bahá'í writings as well as a collection of stories about the funds.

Roles



In the top right corner of the Dashboard, under the label “Primary Donor”, the system shows the role in which you are currently interacting with the system. If you have only one role then you will always automatically interact using that role. But if you are, for example, a local treasurer, you can find that role or any other roles you may have in the dropdown menu located where your name is displayed.

Important:
The two pillars of OCS navigation are **“Primary Donor (Role)”** and **“Main Menu”**. If you change your role the Main Menu adapts and displays relevant options.



1 Primary Donor dropdown menu

2 Main Menu icon

3 National Bahá'í Fund progress chart

4 Test Goal 2021 progress chart

5 Upcoming Contributions table

6 My Quick Links section

7 Passages/Stories content area

| Next Payment | Frequency | Paid by | Amount | Status | Modify |
|--------------|--------------|------------|---------|--------|-------------------------------|
| 08/30/2021 | Bahá'í Month | Acc - 0008 | \$50.00 | | ✕ ✎ |

I am, O my God, but a tiny seed which Thou hast sown in the soil of Thy love, and caused to spring forth by the hand of Thy bounty... Send down upon it, from the heaven of Thy loving-kindness, that which will enable it to flourish beneath Thy shadow and within the borders of Thy court.

Bahá'u'lláh

Main Menu

The main menu is present on all pages in the Online Contribution System and serves to facilitate navigation of the site. To display the main menu from anywhere in the system, simply click on menu icon on the top-left corner of the page. Here is a list of menu options:



Personal Goal

To set up a personal goal, click on the “Add your personal goal” button in the dashboard. In the panel “Create Personal Goal”, enter a name for the goal and the period during which you wish to fulfill it. You are now ready to add fund(s) to your goal. The system will prompt you for an amount for each added fund. Once done, simply confirm your selection by clicking on the “Add As Goal Fund” button. To save your goal, please click on “Save” button.

Notes: Earmarking for local funds is not available when you set a personal goal. But all local contributions with or without earmarks will be counted toward your overall local fund goal (see details in the Earmarks section).

Goal Monitoring

After you create a personal goal, a pie chart with the total amount set as a goal will display on the dashboard. All contributions made toward the personal goal will be counted and displayed in the chart, in real-time.

CANCEL **CREATE PERSONAL GOAL** **SAVE**

Please select the duration, fund(s) and amount to setup your goal

GOAL SETTINGS

Goal Name: My Goal 2021

Start date: 02/22/2021

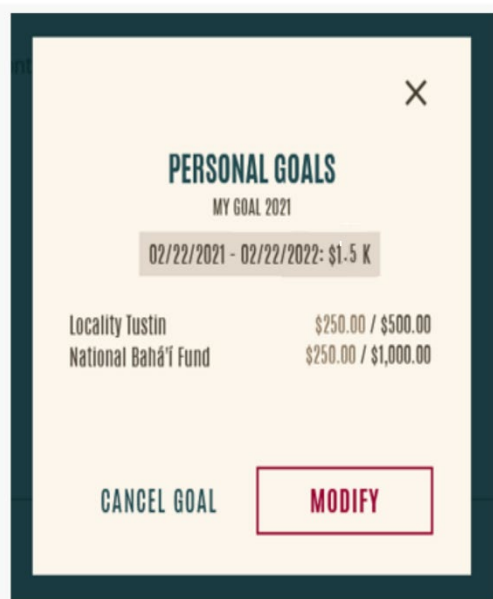
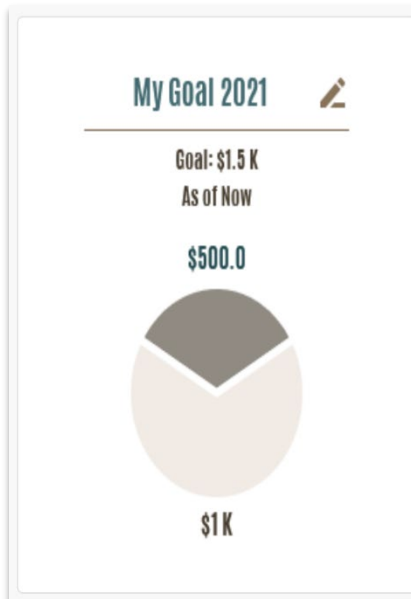
End date: 02/22/2022

SELECT FUNDS

| Fund | Amount |
|----------------------|------------|
| Locality Tustin | \$1,000.00 |
| National Bahá'í Fund | \$500.00 |

FUNDS SELECTED


| | |
|---------|------------|
| 2 Funds | \$1,500.00 |
|---------|------------|



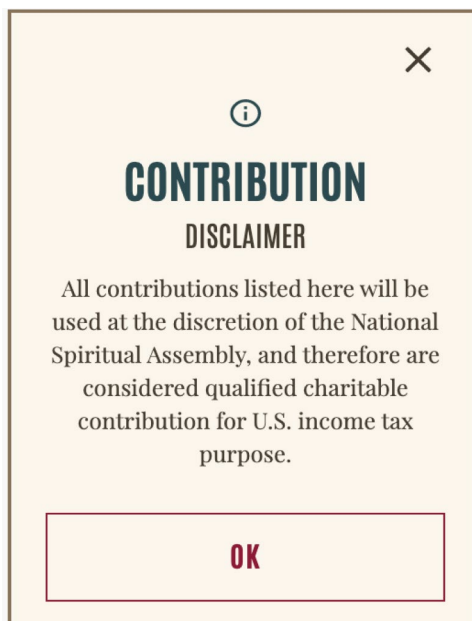
Making Contributions

OCS offers four types of contributions. There are two pathways to making contributions. One option is to select the type of contribution you wish to make in the “My Quick Links” and the other is through the main menu by selecting the “Contribution” option. Below, you can see a short description of each of the four types.

CONTRIBUTION TYPE

| | | | |
|---|--|--|--|
|  <p>ONE-TIME</p> <p>Select from the Bahá'í Fund(s) of your choice to make a one-time contribution now or to schedule one for a future date.</p> |  <p>CONTINUING</p> <p>Select one of three frequencies - once every two weeks, once every 19 days, or once every calendar month - to create an automatic contribution to the Bahá'í Fund(s) of your choice.</p> |  <p>IN-HONOR</p> <p>Make a one-time contribution for a special occasion or for a loved one whom you wish to honor. Send a card acknowledging this donation to the recipient of your choice.</p> |  <p>IN-MEMORY</p> <p>Make a one-time contribution in memory of a loved one, and send a card acknowledging this donation to the recipient of your choice.</p> |
|---|--|--|--|

Please note the disclaimer that appears when you select any of the four types of contributions.



One-Time Contribution

“One-Time” is a quick way to make a contribution that will not be repeated (not continuing).

Continuing Contribution

“Continuing” allows you to schedule a contribution to be automatically repeated using one of the options below:

- Once Every Two Weeks
- Once Every Nineteen Days
- Once Every Calendar Month

Continuing contributions will be automatically processed on their recurring due dates until the date set as “Effective Until” is reached. If “Effective Until” is left blank, the continuing contribution will not expire. Upcoming continuing contributions can be viewed in the middle section on the dashboard as well on the “Summary Center”.

In-Honor Contribution (one-time)

“In-Honor” sets up a one-time contribution, with option to create an electronic card, for a special occasion or to simply honor a loved one.

In-Memory Contribution (one-time)

“In-Memory” sets up a one-time contribution, with option to create an electronic card, in memory of a loved one who has passed on.

Earmarking Local Fund Contributions

The new version of the Online Contribution System (OCS) comes with an exciting new feature that provides friends with more flexibility in making their contributions. Friends may now contribute to *specific uses within a Local Fund*. These contributions are known as earmarks. Before this new feature, friends could only contribute to the general Local Fund, known as the Local Bahá'í Fund. This new feature enables Local Spiritual Assemblies to have the option to add two additional earmarked funds on OCS.

Earmarking funds is a practice that is not encouraged in most cases and a Local Spiritual Assembly is under no obligation to offer earmarking to its community through the Online Contribution System. However, if a Local Spiritual Assembly decides to offer earmarking to its community, the local treasurer can set up the specific earmarked funds in OCS.

Two earmarked funds are being offered - "Area Teaching Committee" and "Bahá'í Center" funds. More earmarks will be added in the future. Please note the *Local Bahá'í Fund* (General fund) continues to be available as the default local fund.

Area Teaching Committee – This fund supports the material costs associated with the mobilization of individuals for the continued spread of the pattern of activity in a cluster. Expenses can include gatherings for worship, home visits, strengthening spiritual bonds with the parents of children and junior youth; building on the interest of those who have shown goodwill towards the Faith but have yet to take part in its activities and teaching the Faith.

Bahá'í Center - The most visible physical asset a community can enhance the vitality of Bahá'í community life and better support the process of growth. This Fund supports all costs associated with the building, acquiring or maintaining a center of activity whether owned, leased or in the planning stages. Three principles that the contributor and the accepting institution must be aware of regarding earmarked contributions:

- 1) It is restricted to a specific use
- 2) Acceptance of an earmarked contribution is binding in perpetuity (e.g., if the Bahá'í Center is sold, the contributions remain earmarked only for a Center)
- 3) Its alternative use must be mutually accepted by both the contributor and the receiving institution

The following quote from the Supreme Body elaborates on these three principles:

"The beloved Guardian was very emphatic that contributions to Bahá'í funds, given for specified purposes, may be used only for those purposes, unless the donor consents to a change. If the Assembly cannot use the contribution for purpose specified, it may refuse to accept it. Alternatively, it could consult the donor and suggest that he release the contribution for general purposes or transfer it to another specified one, but no pressure should be exerted to force his acquiescence. On the other hand, once money has been contributed to an Assembly, it is the property of that Assembly, even though earmarked for a specific purpose, and the donor has no right to change its purpose unilaterally. The Assembly, however, may, as its own discretion, accept his request to do so." (*From a letter written on behalf of the Universal House of Justice to a National Spiritual Assembly, December 30, 1984*)

Notes to the Treasurer: The pool of available earmarked funds will grow as Local Spiritual Assemblies identify the need. It is important for local treasurers to educate the friends promptly and actively in their communities on the purpose and usage of earmarked funds, leaving no room for confusion and misunderstanding.

Electronic transfers of the funds collected in OCS on behalf of local communities will continue to be sent as a single, total amount and not through multiple electronic deposits. In other words, the sum of all contributions, regardless of earmarking, is bundled into a single payment and electronically transferred to the Assembly's designated bank account. OCS provides local treasurers with special reports that clearly display the breakdown of contributions allocated to various earmarked funds for a given reporting period.

Step 1 of 5
SELECT FUND
ONE-TIME

| | |
|--|-----------------|
| Fund evan ▼ | Amount |
| Locality Evanston EARMARKS | ADD TO FUND BOX |

If a local fund offers earmarking, meaning one or more designated funds other than the general fund (“Local Bahá’í Fund”), the word “EARMARKS” will display next to the locality name. If you select such a fund, the system will provide a dropdown menu with earmarking option(s).

Step 1 of 5
SELECT FUND
ONE-TIME

| | |
|--|-----------------|
| Fund Locality Evanston ▼ | |
| Earmark ▼ | Amount |
| Local Bahá’í Fund | ADD TO FUND BOX |
| Area Teaching Committee | |

Notes: Local fund earmarks must first be set up by the local treasurer for them to be available to the community.

Important: the “Local Bahá’í Fund” option is for giving a non-earmarked contribution to the fund of a selected locality. Every local fund has this option. To contribute to a locality’s main (general) fund, please select “Local Bahá’í Fund” after selecting that locality.

Step 1 of 5
SELECT FUND
ONE-TIME

| | |
|--|----------------|
| Fund ▼ | Amount |
| ADD TO FUND BOX | |
| FUNDS SELECTED | |
| × Locality Evanston Local Bahá'í Fund | \$40.00 |
| × Locality Evanston Area Teaching Committee | \$40.00 |
| 2 Funds | \$80.00 |

Five Steps for Making a Contribution

Access to all contribution types can be obtained directly from the dashboard using “My Quick Links” or through the main menu by selecting “Contribution”. Please use buttons at the bottom of the screen to navigate between steps during the contribution creation process. Some steps are required while some of them can be skipped.

Step 1: Select Fund

There are two easy ways to locate a fund. Option 1: Start typing the name of the fund and click on it when it appears. Option 2: Click on the “Fund” dropdown menu and scroll down to select the desired fund.

Step 1 of 5
SELECT FUND
ONE-TIME

| | |
|--|--|
| Fund Intern ▼ | Amount |
| <div style="border: 1px solid #ccc; background-color: #fff; margin-top: 5px;"> <p>International Bahá'í Fund</p> <p>International Endowment Fund</p> </div> | ADD TO FUND BOX |

Next, enter the contribution amount and click on the “Add to Fund Box” button. In the bottom of the screen, you can see the total number of funds selected along with the total amount to be contributed. A contribution Fund Box may contain more than one fund.

Step 2: Add Contributor(s)

Please type in the exact first name, last name, and Bahá'í ID of any other contributor(s) you wish to be listed as taking part in the contribution. Once entered, please click on the “Add Contributor” button. If the required information is not correct in any of the three fields, the system will prompt you to make a correction. Please note that while the system allows any American Bahá'í in good standing to be entered as a contributor, this feature is intended for the friends to add member(s) of their immediate family.

**Step 2 of 5
SELECT CONTRIBUTORS
ONE-TIME**

CONTRIBUTOR INCLUDED

| | | |
|---|------------|----------|
| ✖ | Jane Smith | ID 12345 |
| ✖ | John Smith | ID 54321 |

2 Funds
2 Contributors
\$80.00

The primary contributor (current user) cannot be removed. You may add up to 5 additional contributors to a contribution for a total of 6. If there is no other contributor besides the primary one, skip this section by clicking on the “Next” button.

Step 3: Contribution Type & Date

This step confirms whether you are making a “One-Time” or “Continuing” contribution and in some cases will allow you change these two options.

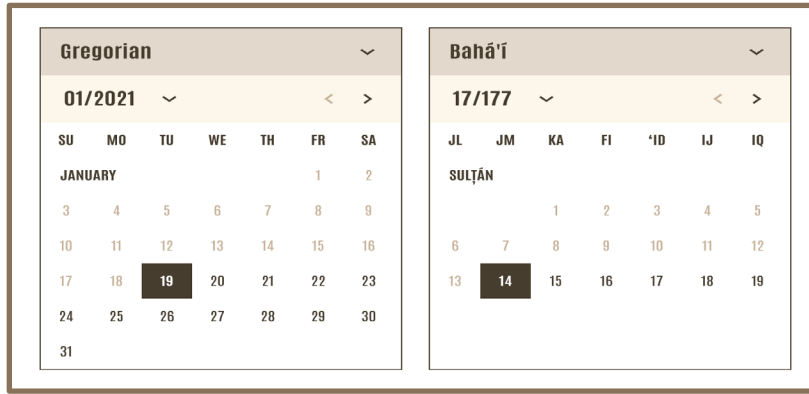
**Step 3 of 5
CONTRIBUTION TYPE & DATE
ONE-TIME**

One-Time Continuing

Select a Payment Date
for your One-Time Contribution

Process Payment on
07/04/2021

For “One-Time” contribution, you may leave the “Process Payment On” date as is or schedule the contribution for a future date using the calendar option. You may choose the Gregorian or the Bahá'í calendar.



For a “Continuing” contribution, use the “Payment Frequency” dropdown menu to choose how often the automatic contribution will be made. Next, choose a “Start Date” using the calendar option. You may leave the “Effective Until” empty unless you wish to choose a date for your “Continuing” contribution to end. **All contributions will be processed according to the U.S. Eastern Time Zone.**

Step 3 of 5
CONTRIBUTION TYPE & DATE
CONTINUING

One-Time **Continuing**

Schedule a Continuing Contribution

Payment Frequency
Select a Payment Frequency ▼

Start date
07/04/2021 📅

Effective Until (optional) 📅

Step 3.1: Create In honor/In Memory Certificate (for when In Memory/In Honor selected)

This step is available only for In-Honor and In-Memory contribution types and allows the creation of a certificate to share.

Step 3 of 6
CREATE CERTIFICATE
IN-HONOR

THIS IS IN HONOR OF

Title ▼ First & Last Name

OCCASION

(Optional)




OFFERING MADE BY

✕ John Doe

SEND CARD TO

Title ▼ First & Last Name

BORDER (DECORATION)


 
 
 No Border

+ SELECT PASSAGE + ADD MY OWN WORDS

In addition to the main information, you can also select a passage from the provided selection using search option(s) or add your own words.

SELECT PASSAGE
IN-HONOR

| | | |
|------------------------|-------------|--------------|
| Category Blessing ▾ | Author ▾ | Passage text |
|------------------------|-------------|--------------|

SEARCH

3 Passages

- Every soul that walketh humbly with its God, in this Day, and cleaveth unto Him, shall find itself invested with the honor and glory of all goodly names and stations.
Blessing ‘Abdu’l-Bahá
- O my God! Let the outpourings of Thy bounty and blessings descend upon homes whose inmates have embraced Thy Faith, as a token of Thy grace and as a mark of loving-kindness from Thy presence.
Blessing The Báb
- Blessed is the spot, and the house, and the place, and the city, and the heart, and the mountain, and the refuge, and the cave.
Blessing

“

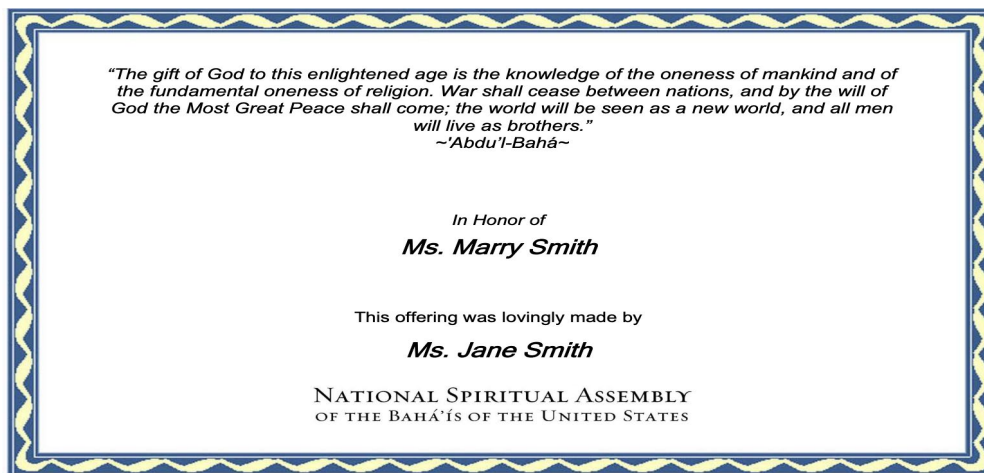
Every soul that walketh humbly with its God, in this Day, and cleaveth unto Him, shall find itself invested with the honor and glory of all goodly names and stations.

‘Abdu’l-Bahá

”

✕ DELETE PASSAGE ⇌ CHANGE PASSAGE

Certificates can be previewed if you click on the “Preview Card” button.



Notes: To skip creating an in-honor or in-memory certificate, click on the “Skip Card” button located at the bottom of the screen, near the “Next” button.

Step 3.2: [Certificate] Delivery Settings (for when In Memory/In Honor selected)

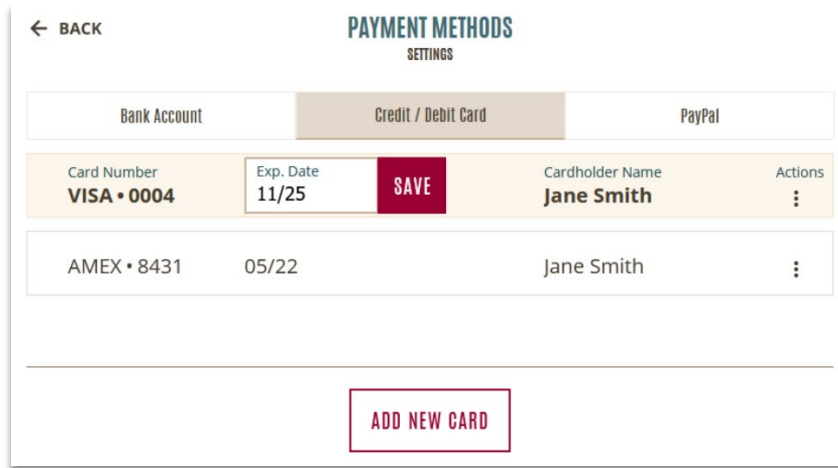
This step is available in conjunction with the creation of a certificate. These are the options for delivering a certificate:

- **By Email** (please specify one or more recipients’ email)
- **Print Myself** (can be downloaded in PDF format after processing or later in the Contribution Summary Center)
- **Mail from the Bahá'í National Center** (please specify the postal address of the recipient)

Step 4: Payment Method

OCS offers these payment methods for making a contribution:

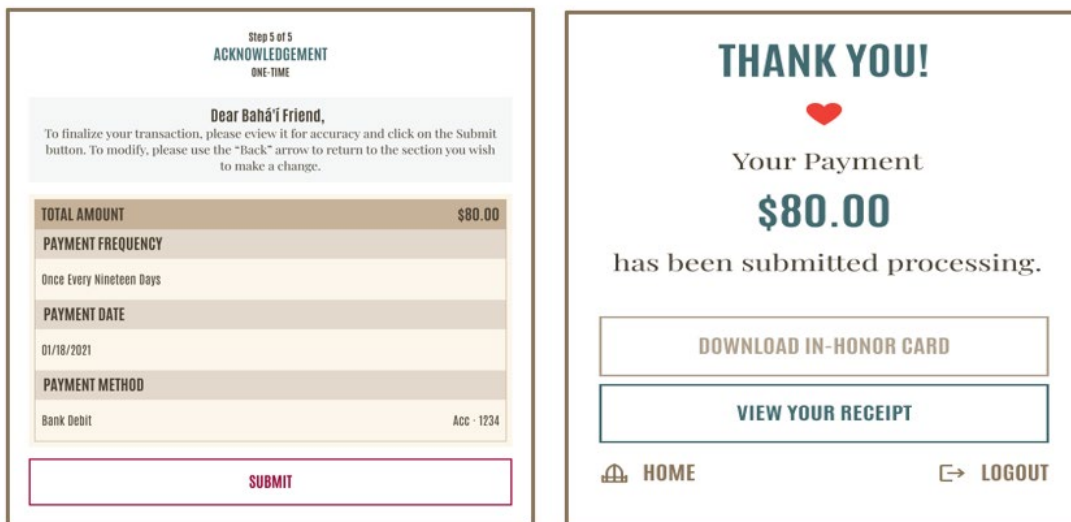
- Checking or Savings Bank Account
- Credit or Debit Card (Visa, MasterCard, Discover, AMEX)
- PayPal
- Venmo is expected to be available soon.



You can add a new payment account while making a contribution or at any other time. To add a new account, simply select the payment method and follow the instructions provided. Select how you wish to pay and click on the “Next” button.

Step 5: Acknowledgement (Verification)

The final step allows you to verify all the key information on the contribution for accuracy before submitting.

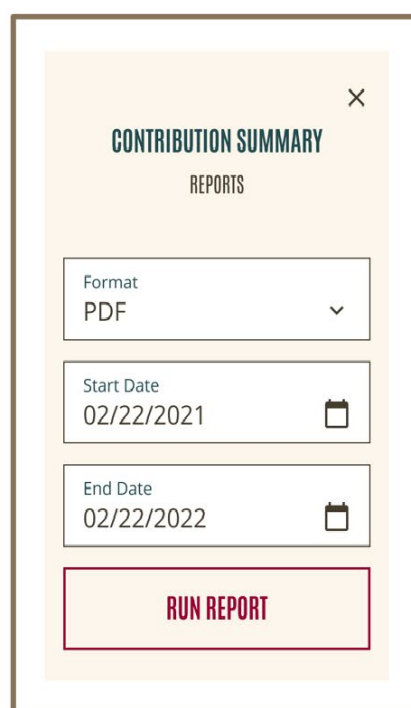
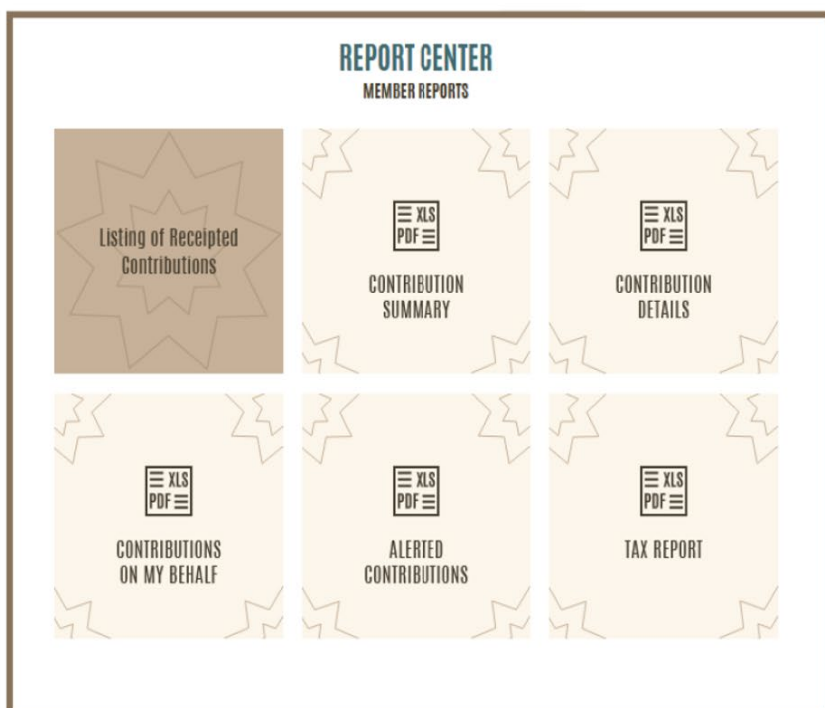


After you click on the “Submit” button, your transaction will be processed and receipted on the date of payment. Receipts for processed transactions can be viewed or printed from the Contribution Summary Center.

Report Center (Member Reports)

This set of reports can generate lists of receipted transactions for a period of your choosing, in PDF or Excel format. You can choose Gregorian or Bahá'í calendar to set your reporting period. To display a brief description of each report, simply hover over a report icon. The following reports are available.

- **Contribution Listing:** Listing of Receipted Contributions
- **Contribution Summary:** Summary of Receipted Contributions by Type
- **Contribution Details:** Detailed Listing of Receipted Contributions
- **Contributions on My Behalf:** Contributions Made by Someone Else on my Behalf
- **Alerted Contributions:** Listing of Contributions Requiring Prompt Attention
- **Tax Report:** Listing of Receipted Contributions for Tax Purposes



[Contribution] Summary Center

You can access the Summary Center directly from the dashboard using quick access links, or through the main menu. Summary Center provides information about all processed, upcoming (scheduled) contributions, and purchases.

Upcoming Contributions (Summary Center)

The “Upcoming” tab displays your continuing contributions that are coming up soon for processing. These contributions can be modified or canceled. To modify or cancel a scheduled contribution, select the item and click on the 3-dot in the “Actions” column.

← BACK **CONTRIBUTION SUMMARY CENTER**

| Upcoming | | | | Processed | | Purchased | |
|----------|------------|-------------|--------------|-------------|----------|-----------|--------|
| # | Date | Method | Frequency | Paid By | Total | Actions | |
| 1 | 07/23/2021 | Bank Debit | Bahá'í Month | Acc • 7890 | \$80.00 | ⋮ | |
| | | | | | | | View |
| 2 | 08/06/2021 | Credit Card | Monthly | VISA • 0004 | \$120.00 | ⋮ | |
| | | | | | | | Modify |
| | | | | | | | Cancel |

Important: Upcoming contributions with a status of “ALERT” can be clicked on for details.

Processed (Summary Center)

The “Processed” tab displays all receipted contributions as well as In-Honor and In-Memory certificates. By clicking on the 3-dot in the “Actions” column, you can select an action on the highlighted item.

← BACK **CONTRIBUTION SUMMARY CENTER**


| Upcoming | | | | Processed | | Purchased | |
|----------|------------|-------------|--------------|--------------|----------|-----------|--|
| # | Date | Method | Type | Paid By | Total | Actions | |
| 1 | 07/15/2021 | Credit Card | One-Time | Visa-0004 | \$500.00 | ⋮ | |
| 2 | 07/06/2021 | Credit Card | Monthly | Visa-0004 | \$120.00 | ⋮ | |
| 3 | 07/05/2021 | Credit Card | In-Honor | Visa-0004 | \$40.00 | ⋮ | |
| 4 | 07/05/2021 | Credit Card | One-Time | Visa-0004 | \$50.00 | ⋮ | |
| 5 | 07/05/2021 | Credit Card | One-Time | Visa-0004 | \$30.00 | ⋮ | |
| 6 | 07/05/2021 | Credit Card | In-Honor | Visa-0004 | \$20.00 | ⋮ | |
| 7 | 07/05/2021 | Credit Card | In-Honor | Visa-0004 | \$20.00 | ⋮ | |
| 8 | 07/04/2021 | Credit Card | Monthly | Amex-8431 | \$50.00 | ⋮ | |
| 9 | 07/04/2021 | Bank Debit | Bahá'í Month | Savings-7890 | \$80.00 | ⋮ | |

Notes: Receipts for adjusted transactions can be viewed on the “Processed” or “Purchased” tab depending on the type of the initial transaction.

Purchased (Summary Center)

The “Purchased” tab displays a listing of receipted transactions related to purchases of a replacement membership card or a birth or marriage certificate ordered through the Membership and Records Office.

| ← BACK | | | | | | | SUMMARY CENTER CONTRIBUTIONS | |
|----------|------------|-------------|------------|----------|-----------|---------|---------------------------------|--|
| Upcoming | | Processed | | | Purchased | | | |
| # | Date | Method | Paid By | Total | Status | Actions | | |
| 1 | 07/10/2017 | Bank Debit | Acc • 6484 | \$100.00 | APPROVED | ⋮ | | |
| 2 | 07/10/2017 | Credit Card | Acc • 1111 | \$25.00 | APPROVED | ⋮ | | |
| 3 | 07/10/2017 | Credit Card | Acc • 1111 | \$100.00 | APPROVED | ⋮ | | |
| 4 | 07/10/2017 | Credit Card | Acc • 1111 | \$40.00 | APPROVED | ⋮ | | |
| 5 | 07/10/2017 | Credit Card | Acc • 1111 | \$15.00 | APPROVED | ⋮ | | |

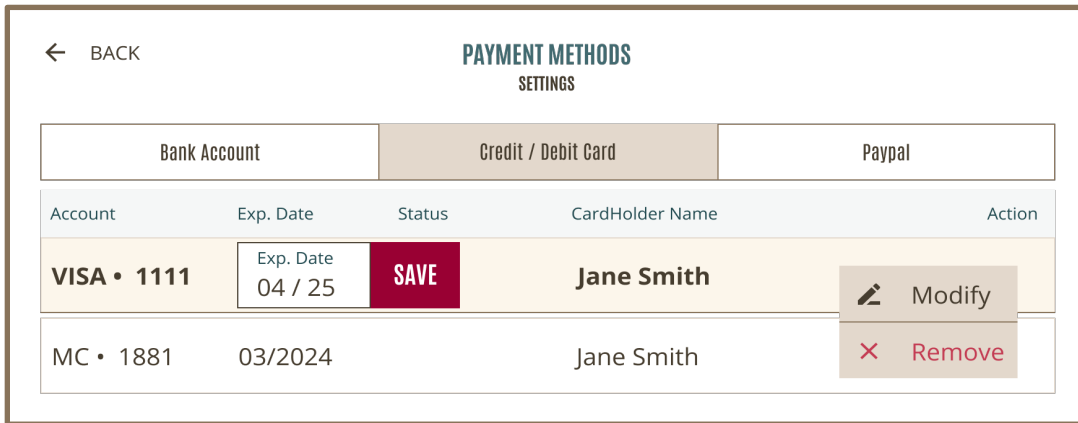
 View receipt

Payment Methods

Payment Methods can be accessed through the main menu. You can add a new payment account or modify or remove an existing one. To add a new account, click on the payment method tab of your choice and follow the instructions provided on the screen. To remove an account, highlight the row by clicking on it and then click on the 3-dot in the “action” column. To modify a credit card expiration date, click on the “Exp. Date”, enter a new date and save changes.

| ← BACK | | | | | | PAYMENT METHODS SETTINGS | |
|--------------|-----------|---------------------|-----------------|--------|--------|-----------------------------|--|
| Bank Account | | Credit / Debit Card | | | Paypal | | |
| Account | Exp. Date | Status | CardHolder Name | Action | | | |
| VISA • 1111 | 11/2025 | EXPIRED | Jane Smith | ⋮ | | | |
| MC • 4444 | 03/2024 | | Jane Smith | ⋮ | | | |
| MC • 4444 | 03/2024 | | Jane Smith | ⋮ | | | |

ADD NEW CARD

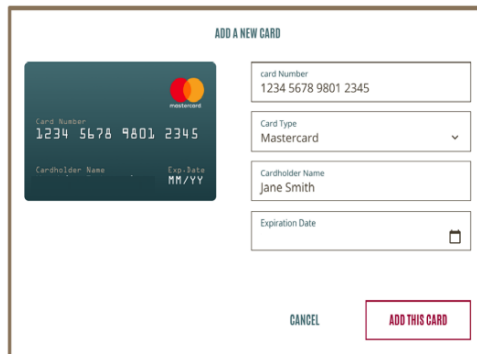


| PAYMENT METHODS SETTINGS | | | | |
|--------------------------|----------------------|---------------------|-----------------|--------|
| Bank Account | | Credit / Debit Card | | Paypal |
| Account | Exp. Date | Status | CardHolder Name | Action |
| VISA • 1111 | Exp. Date 04 / 25 | SAVE | Jane Smith | Modify |
| MC • 1881 | 03/2024 | | Jane Smith | Remove |

Important: When removing an existing payment account, please make sure it is not being used for any scheduled (upcoming) continuing contribution.

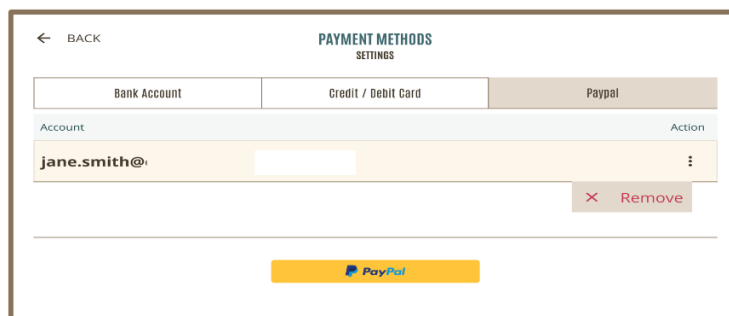
Add/Manage Credit/Debit Cards

To add a new credit card, start entering the card number and the system will automatically define the credit card type (or you may select the type from the list). Please type the card holder name exactly as it is displayed on the card and add expiration date. When all the required fields are entered, click on the “Add this Card” button to complete the process. Newly added cards will be displayed on the credit/debit card tab and become available as a payment account for future contributions.



Add/Manage PayPal account(s)

To add a new PayPal account, click on the “PayPal” tab. You will be redirected to the PayPal login screen. Once logged in, select the PayPal account you want to use for contributions and confirm the agreement. After confirmation, you will be redirected back to OCS and will see the added PayPal account in the list of available payment accounts. To remove a PayPal account from the list, select the account and click on the 3-dot in the “Action” column. **All modifications to PayPal account must be done directly in your PayPal account (website).**



| PAYMENT METHODS SETTINGS | | | | |
|--------------------------|--|---------------------|--|--------|
| Bank Account | | Credit / Debit Card | | Paypal |
| Account | | | | Action |
| jane.smith@ | | | | ⋮ |
| | | | | Remove |