

Online Contribution System

User Guide for New Release For Local Spiritual Assembly Members

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.

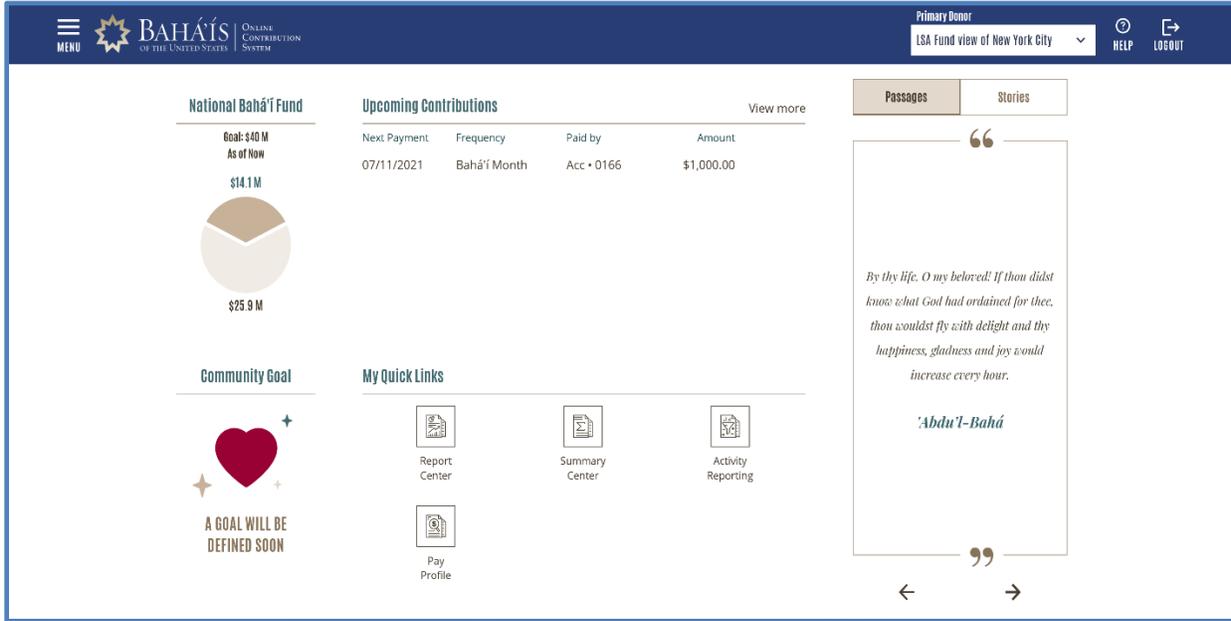
In redesigning OCS, attention was given to preserving the sacred nature of the experience of giving to the funds as well as ensuring a diverse audience is comfortable using the system.

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

Dashboard for Local Fund View

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.

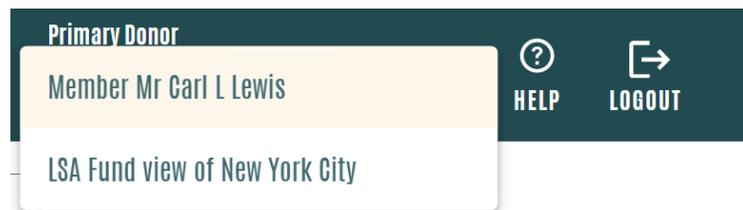
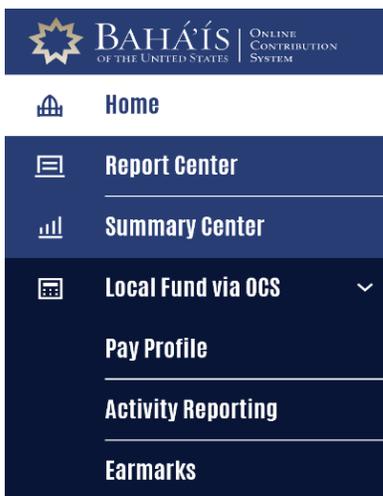


Main Menu

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 the main menu icon on the top-left corner of the page. The dashboard as well as the main menu changes depending on the role you select in top-right section of the dashboard right under the words “Primary Donor”. By changing your role to “LSA Fund View”, you can have access to the following.

LSA Fund View: The main menu is divided into 2 sections:

- Menu options for reviewing and reporting the activities associated with contributions your locality has made to the senior institutions’ funds. (Please see below in blue background).
- Menu options for reviewing activities related to the contributions received by your local fund through OCS. (Please see below in black background).



This user guide focuses on the features and functions available to every Local Spiritual Assembly member recognized in the National Membership System. This brief user guide is compiled specifically to guide the Local Spiritual Assembly members on how they can access viewing and reporting of the incoming and outgoing transactions related to their local fund in read-only mode.

Local Fund Disbursement Pay Profile

Contains read-only information about the Locality Pay Profile, information needed by the Office of the Treasurer to route contributions to the local fund bank account. This disbursement, at the time of this writing, takes place on the 15th day and the last day of a month. **Important:** Any changes in the local bank account must be communicated to the Office of the Treasurer in writing with selected Local Spiritual Assembly Officers signing the change request form.

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LOCAL FUND DISBURSEMENT PROFILE

CHICAGO (1L9358)

PROFILE STATUS

Status	Enrolled Date	Type
Active	10/29/2013	Recurring
Hold Disburse	Status Date	
Yes	10/31/2013	

Address	LSA Email
PO Box 15385, Chicago, IL 60615-5144	test.secretariat@chicagobahai.orgtest
Locality Treasurer	Treasurer Email
Mr Shahab Saeed	test.shahabsaeed@cast.test

BANK TO RECEIVE DIRECT DEPOSIT

Bank Name	Active	
JPMORGAN CHASE BANK, NA	Yes	
Routing #	Bank Account	Account Type
071000000	457	Checking
Method	Payment Min	Payment Max
Bank Account	\$0.00	\$50,000.00

DELAYS TO DISBURSE

Days
0

PAYMENT ALLOCATION SETUP

Distribution Allocation	Destination Fund Name	Amount	PCNTG%	Status	Status Date
Electronic Transfer to LSA	Locality Chicago		100%	Active	10/28/2013

Activity Reporting for Local Fund Incoming and Outgoing Transactions

Listing of the incoming and outgoing transactions (activities) related to the contributions received by your local fund for a selected period.

Earmarks

The new version of OCS comes with an exciting new feature that provides the friends with more flexibility in contributing to their local fund. Friends may now contribute for specific purposes or earmark(s). Before now, friends could only contribute by OCS to the general local fund, known as the Local Bahá'í Fund. This new feature gives the Local Spiritual Assemblies the option to add up to two earmarked funds for their contributors to choose. The treasurer or the assistant treasurer can designate these earmark(s) within OCS.