Online Donations and Payments Guide

December 2021

This guide is divided into two parts. The first part will walk you through getting access to our online payments platform – specifically setting up a password so you can access your account. The second part will walk you through contributing to the Temple online.

<p align="center">**Part I: Getting Access to your ShulCloud Account (& resetting your password)**</p>

The vast majority of people who interact with our Temple regularly will already have an account set up, as ShulCloud is also the system we use to process Temple financial contributions, send weekly emails, and generally run the day-to-day business of the Temple.

If you are:

1. a current member of Temple Emanuel Sinai

<p align="center">**or**</p>

2. have made a donation to Temple in the past (such as a Yahrzeit donation),

<p align="center">**and**</p>

3. we have your email address on file – for example, if you ever receive Temple e-

<p align="center">mails</p>

Then you already have an account. **All you will need to do is reset your password.**

If you do not meet the above criteria, please email the office at office@emanuelsinai.org or call us at 508-755-1257 to discuss setting up an account.

To get access/reset password:

Step 1: Navigate to templeemanuelsinai.shulcloud.com (Note: this is *not* our main website, which is emanuelsinai.org, it is a different website!)

Step 3: Type in your email address in the bar provided and click "email password"

Step 4: Check your email for a "Password Reset Request" email from Temple – the email will come from office@emanuelsinai.org. Click on the link that says "reset your password." This will take you to the website to enter your password.

≡ Admin Menu ❓ Welcome Sean Morgan ▾

Temple Emanuel Sinai

OUR WEBSITE | HOME | CONTACT US | MY ACCOUNT | DONATE |

Change Password

Please enter a new password below to access your account.

Passwords must match.

New Password *(Min 8 Characters)*: [   ]

Confirm Password: [   ]

CHANGE PASSWORD

©2021 Temple Emanuel Sinai 661 Salisbury Street Worcester, MA 01609
Temple Office Hours: Monday, Wednesday, Thursday and Friday 9:00 am to 3:00 pm
(508) 755-1257 office@emanuelsinai.org

Privacy Policy | Member Terms

Part II: Making Online Payments and Donations with ShulCloud

Step 1: Navigate to Emanuel Sinai's Website: www.emanuelsinai.org

Step 2: Click on the "Donations & Payments" item on the Top Menu Bar.
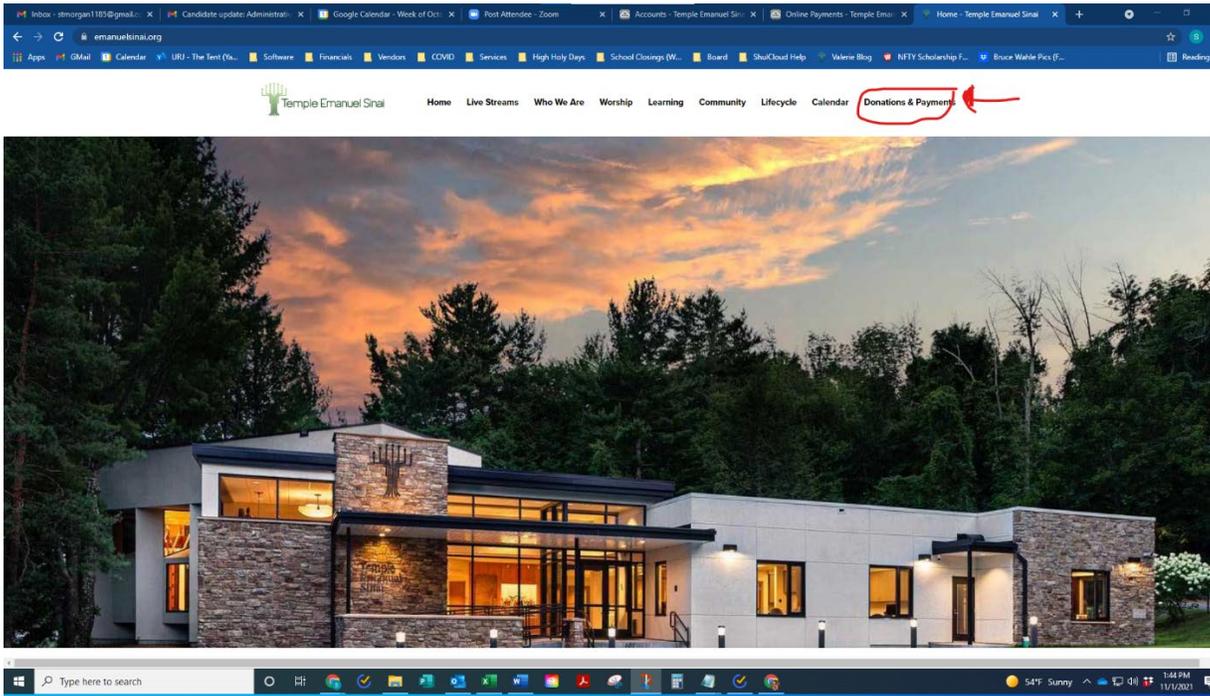
Clicking this button will take you to our new Temple webpage for processing *both* donations and payments (of member dues, religious school tuition, etc.).

Step 3: Select whether your payment is *for account balance* or *a donation*.

1. If you are paying your annual financial commitment, Religious School or Kehillah High School tuition, or are paying for any other previous commitment (e.g. Shelanu capital campaign, pre-agreed High Holy Day appeal, etc.), select *for account balance.*

This is what the screen will look like if you are paying an account balance. Your total account balance will show directly below your name.

There will be a list of charges, with the *date* of the charge, a *description* of the charge, the *due date* of the charge, and a column showing how much of the charge remains *unpaid*.

The *checkboxes* next to the unpaid column allow you to allocate your payment to a specific charge, if desired.

There is also a **drop-down menu** that allows you to set up multiple payments (e.g. monthly payments over a certain time period), if that is easier for your budgeting purposes.

Online Payments

Paying as Morgan, Sean

Account has a balance of **$225.00** ←

3rd Party Payer Third Party Account

Payment is ● for account balance.
○ a donation.

Paying For

Date	Description	Payment Must Complete By	Unpaid ☐
11/01/2021	Financial Commitment 2021/22 *Test charge for ShulCloud Help Doc*	06/30/2022	100.00 ☑
11/01/2021	TESRS Tuition *Test for ShulCloud Help Doc*	-	25.00 ☑
11/01/2021	Kehillah HS Tuition *Test for Shulcloud Help Document*	06/30/2022	25.00 ☑
11/01/2021	High Holy Day Appeal 2021 *Test for ShulCloud Help Document*	06/30/2022	75.00 ☑

Amount $ 225.00

Pay this amount Once Now ▼

Payment Notes

CONTINUE TO PAYMENT »

2. If you are making a donation (e.g. a tribute donation for a Yahrzeit, or a donation to Rabbi's Fund in honor of someone), select *a donation*.

Temple Emanuel Sinai

Online Payments

Paying as Morgan, Sean

Account has a balance of **$225.00**

3rd Party Payer Third Party Account

Payment is ○ for account balance.
→ ● a donation.

→ **Type** Please Choose One ▼

Amount $ 0.00

→ **Pay this amount** Once Now ▼

Payment Notes

Making a donation is similar to paying an account balance. Simply check **"a donation"** and use the drop-down menu next to **"Type"** to select which fund you would like your donation to be used for (e.g. Rabbi's Fund, Music Fund, Social Action, Interfaith Hospitality Network, etc.). If you wish to make a recurring donation, click on the drop-down menu next to "**Pay this amount"** and you can set the donation to be a recurring donation.

Online Payments

Paying as	Morgan, Sean
	Account has a balance of **$225.00**
3rd Party Payer	*Third Party Account*
Payment is	○ for account balance.
	● a donation.
Type	Rabbi's Fund ⌄
Amount	$ 25.00
Pay this amount	Indefinitely ⌄
	Paid Monthly ⌄
	Starting 11/01/2021
	Admin: Schedule to End Later
Payment Notes	

Optional: Dedicating your Donation

ShulCloud's donations page also allows you, as a congregant, to dedicate your donation *without ever calling the office!* You can even set it up so that ShulCloud will automatically notify someone that the donation was made!

The dedication form is at the bottom of the payments and donations page, and looks like this:

Dedicate

in memory of ⌄

Yvette Fowler

Tribute Text, for example: John Doe

Your Name	Sean Morgan

for recipient notifications & newsletter (you can write anonymous)

Person to Notify

Salutation	Dear	Gail	,
Email	gail.morgan@gmail.com	☐Unknown
Address	451 Jacob Lane	☐Unknown
Address Line 2	
City	Worcester	**State** Massachusetts ⌄	**Zip** 01601
Country	United States ⌄

CONTINUE TO PAYMENT »

Simply fill out the dedication, your name, and the information of who to notify, and the system will automatically generate the notification (for e-mails) or create a print notification for Temple staff to send.

- **Note: if you do not wish to dedicate your donation, simply click "Don't Dedicate" in the drop-down menu under "Dedicate".**

Step 4: Click "Continue to Payment" and enter your payment information.

Confirm Payment

Paying	**$25.00** for **Donation for Rabbi's Fund**
	Every month
Account	**Morgan, Sean**
Payment Method	**Online payment by ACH**
	Online payment by Credit Card
Convenience Fee	● Include ○ Don't Include
	$0.79 *What's this?*
Each Payment	**$25.79**

CONFIRM AND CONTINUE »

The next screen will be a confirmation page, and will have you select whether you would like to pay by ACH (direct debit from your checking account) or by credit card. ShulCloud also provides the option of paying a small % for the cost of *processing* your payment, do help Temple defray the cost of credit card processing fees charged by Visa, Mastercard, etc. Although this is optional, we greatly appreciate you opting to cover this fee.

Step 5: Click "Confirm and Continue" and you will be taken to the "Payment Details" page. Here you will enter your payment information. This will look slightly different depending on whether you are paying via ACH or Credit card.

1. **If Credit Card:**

Card Details

Card Number	
Expiration Date	⌄ / ⌄
Security Code	*What's this?*
First Name	Sean
Last Name	Morgan
Address	13 Caroline Street
City	Auburn
Zip	01501
State	Massachusetts ⌄
Country	United States ⌄
Phone	
Email Receipt to	smorgan@emanuelsinai.org
Preferred Payment Method	●Yes ○No
Admin Notes	

PAY NOW

If you elect to pay by Credit Card, all you will need to do is enter your card number, expiration date, and security code in the fields provided. ***Your address should automatically populate from Temple records, but if it is incorrect, please correct it.***

Then click on "Pay Now" and your payment will process!

2. **If ACH (i.e. Paying with your checking account, not a debit/credit card):**

If you elect to use ACH, and do not already have a checking account linked to the Temple, you will need to first link your account with **PLAID**. Plaid is a secure third-party validation software, routinely used by major financial institutions, that will ask you to log into your online bank in order to confirm that you have access to the account being linked to your Temple account.

The Screen will look like this:

Payment Details

Account Type	Personal ⌄

Using a new bank account for an E-Check payment requires account validation prior to use via Plaid.
Learn More?
Note: Plaid instant validation must be done by the account holder and requires secure validation using online banking login information.

Choose Account with ✕ **PLAID**

☑ I authorize Temple Emanuel Sinai or their agent to debit my account in the amount above via e-check as soon as I click the button below. I agree that e-check transactions I authorize comply with all applicable law.

First Name	Sean
Last Name	Morgan
Address	13 Caroline Street
City	Auburn
Zip	01501
State	Massachusetts ⌄
Country	United States ⌄
Phone	
Email Receipt to	smorgan@emanuelsinai.org

PAY NOW

Simply check the checkbox next to "I authorize Temple Emanuel Sinai or their agent" and ensure your address is correct, then click on "Choose Account with Plaid."

You will then see a short series of screens – an information screen, a second screen asking you to select your banking institution, and a third screen asking you to log into your bank account.
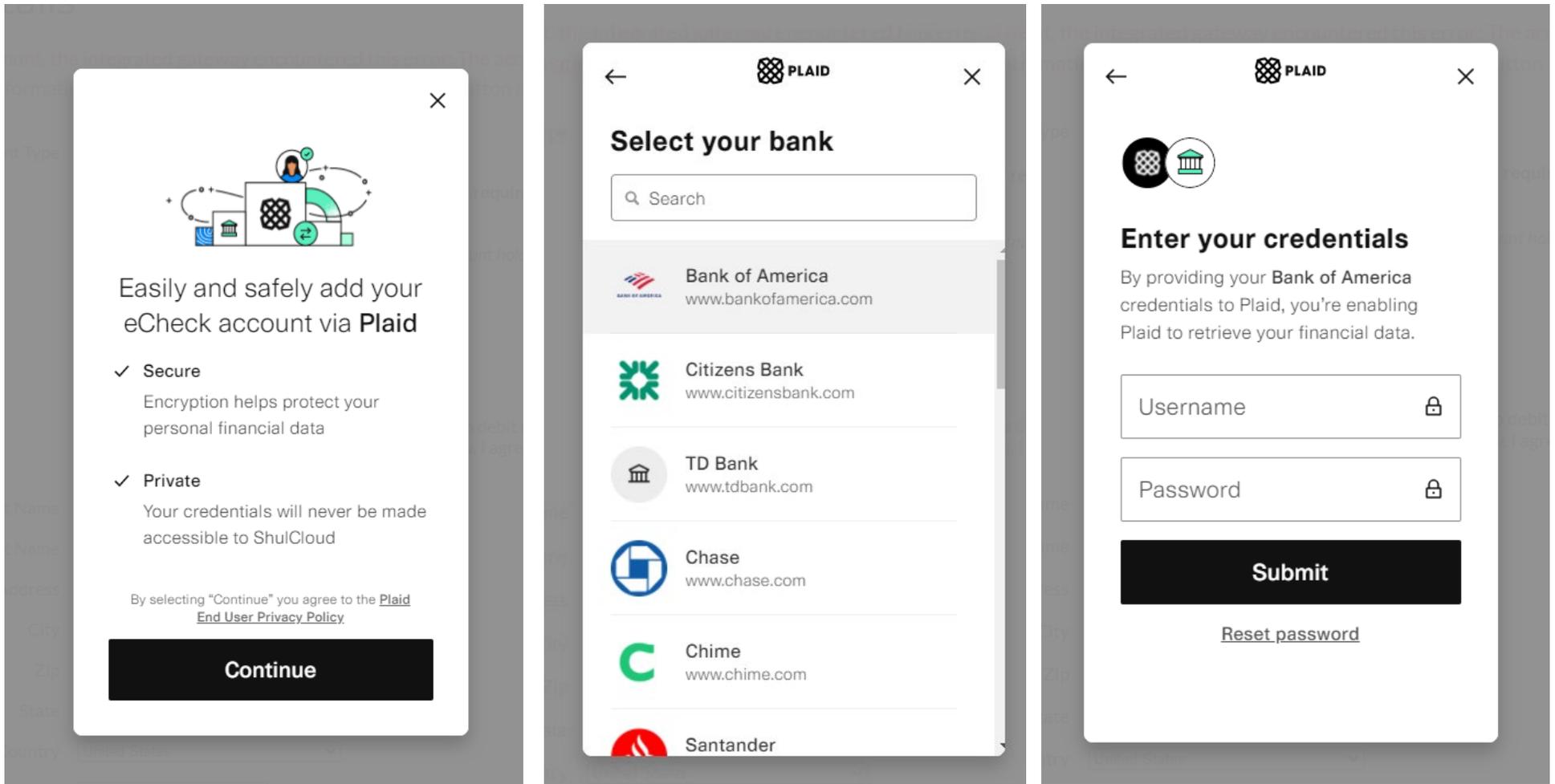
Once you have completed all three screens and logged-in successfully, you will be taken back to the "Payment Details" page. Click on "Pay Now" and your payment will be processed!

Note: You will only need to go through the Plaid verification process once for each account you link.