

QUICK & EASY GUIDE

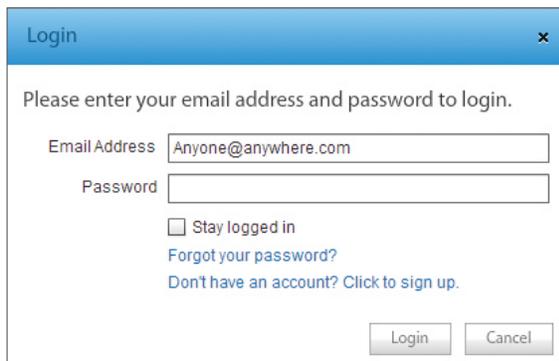
New to WeShare? Welcome! Let Us Show You Around!

Show Me How

1 How can I update my credit card or banking information?

Please follow the steps below to update your financial information:

- a** Log into your WeShare account. If you forget your password, click on the **Forgot your password?** link to be sent a temporary password or contact us to do it for you.



The screenshot shows a 'Login' window with the following fields and options:

- Header: Login [x]
- Text: Please enter your email address and password to login.
- Form fields: Email Address (containing 'Anyone@anywhere.com'), Password
- Options: Stay logged in, [Forgot your password?](#), [Don't have an account? Click to sign up.](#)
- Buttons: Login, Cancel

- b** Once you are logged in, click on the **Recurring Transactions** button.



- c** Look for the **Sources of Funds** menu. Here's a picture.



- d** Click the **Edit** button to edit current information. Only click the **Delete** button if you wish to delete the current card/bank account and use another one.

- e** When you click the **Edit** button, you will be prompted to update your payment information.

What if my current Credit/Debit card only has a **Delete** button and no **Edit** button?

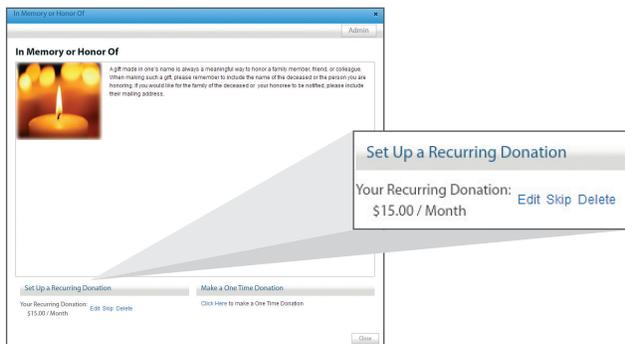
This means that your payment information was migrated from PledgeConnect. To ensure the security of your financial information, WeShare is provided with a token that represents your Credit Card information. To make changes, you will need to add another payment option and add your current credit card information directly to your WeShare account.

2 How do I add another payment option?

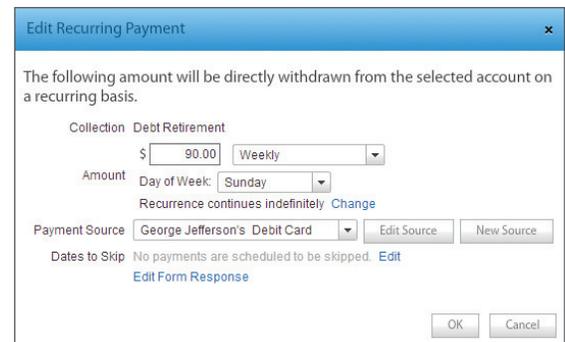
Go to the Recurring Transactions menu and click on the **New Funds Source** button.



- a If you are re-entering a migrated credit card, be sure to re-align your recurring gifts to your newly entered credit card. Do this by clicking to edit your recurring gifts.



- b Next, select your newly entered payment source from the drop-down menu.

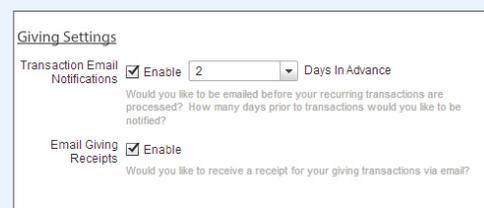


3 How can I change my WeShare e-mail notifications?

- a To opt out of receiving notification emails such as debit reminders and receipts, log in to your account and click on **Settings**.



- b Adjust your **Giving Settings** located below.



4

If I am unable to or do not currently have access to a computer who can help with questions or concerns?

WeShare can help! Please call us directly at 800-950-9952 ext. 2691

5

I really like having my own giving account but am concerned about the security and privacy of my information.

We understand your concerns and want you to feel as comfortable as possible when you're using our platform to process your transactions! WeShare has the highest security level available in the industry—SSAE-16 (formerly SAS70) and SOC I and II Type I and II—and your information is encrypted and protected at all times.

We Think You Want to Know

1

Print your receipt for any given transaction at any time by logging into your account and clicking on **View Giving History**.

2

If you forgot your password, e-mail KSimon@4lpi.com at any time to reset it. You can also call 800-950-9952 ext: 2691.

3

Make changes to your transaction and donation amounts, types of payment, or schedule anytime. You have 100% control of your account.

4

If you wish to use different payment types (credit card/checking account) for various collections, simply assign your transactions to a different fund source.

5

Did you get married? Moved? Changed personal information? Please log in to your account and update your information by clicking on the **Settings** button.

More questions? We love questions!
Please call or e-mail:

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