

## ShulCloud – Members How to Guide for

### Congregation Shaarey Zedek

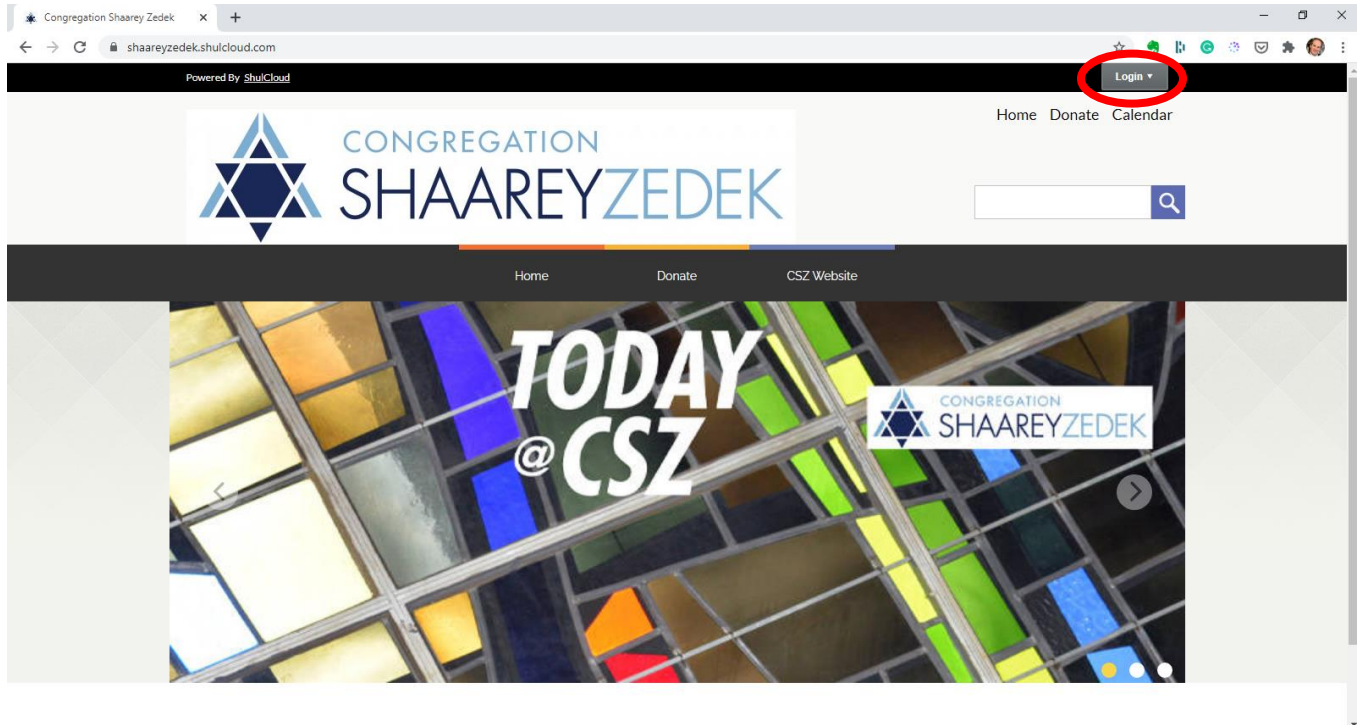
The following Guide is intended to help members of Congregation Shaarey Zedek to most effectively use the ShulCloud database system to access/update their Membership Information. This new system puts the power to update your information into your own hands. Of course, we are also happy to update your information if you prefer to call, email, or write. Further questions can be addressed by calling (248.357.5544) or emailing ([csz.info@shaareyzedek.org](mailto:csz.info@shaareyzedek.org)) the synagogue office.

This guide provides instructions how to:

1. **Login** to your synagogue account
2. Reset your ShulCloud **password**
3. Update your **personal information**
4. Upload a **photo** to your personal account
5. Update your **family information**
6. Change, add, or delete your **address**
7. Add a **Yahrzeit** to your account
8. View your **financial history** and see your **current balance**
9. Add/remove a **credit card or eCheck** from your account
10. View your **recurring payment plans**
11. Make a **donation** from within your account
12. Make an account **payment**

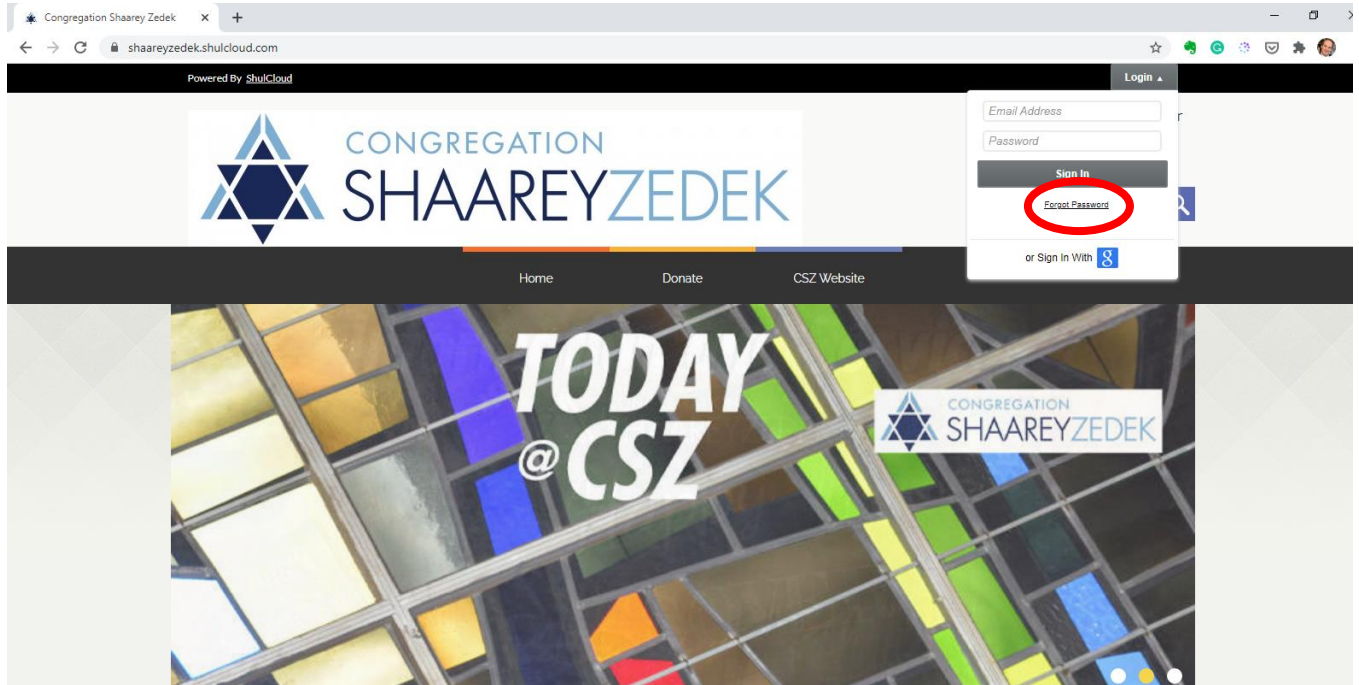
## HOW TO LOGIN TO YOUR SYNAGOGUE ACCOUNT

1. Go to the synagogue member portal website: <https://shaareyzedek.shulcloud.com/>.
2. At the top right corner click on the Login button
3. Enter your e-mail address and password.
4. Click Sign in



## HOW TO RESET YOUR SHULCLOUD PASSWORD

1. Go to the synagogue member portal website: <https://shaareyzedek.shulcloud.com/>.
2. At the top right corner click on the Login button
3. Click Forgot Password

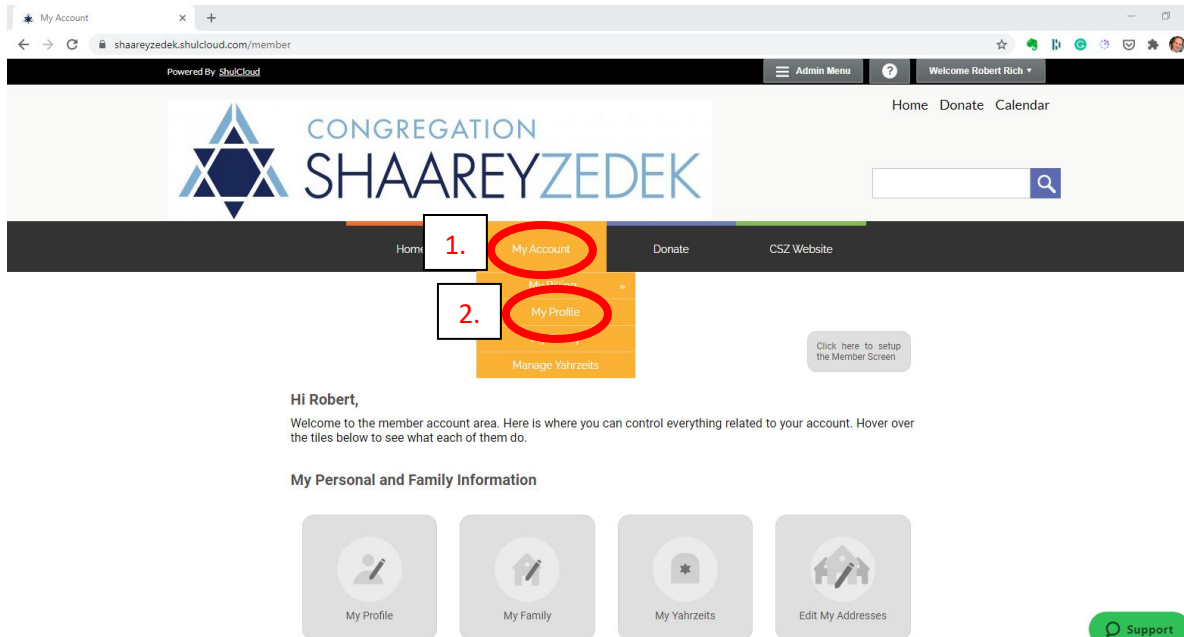


4. Enter your e-mail address (the one that the synagogue has on file for you)
5. Click E-mail Password.
6. You will then be sent an e-mail from the Synagogue. Open the e-mail, and click the Login Link.
7. Enter a new password, twice.
8. Click Save Password. You will then be logged into your Synagogue account.

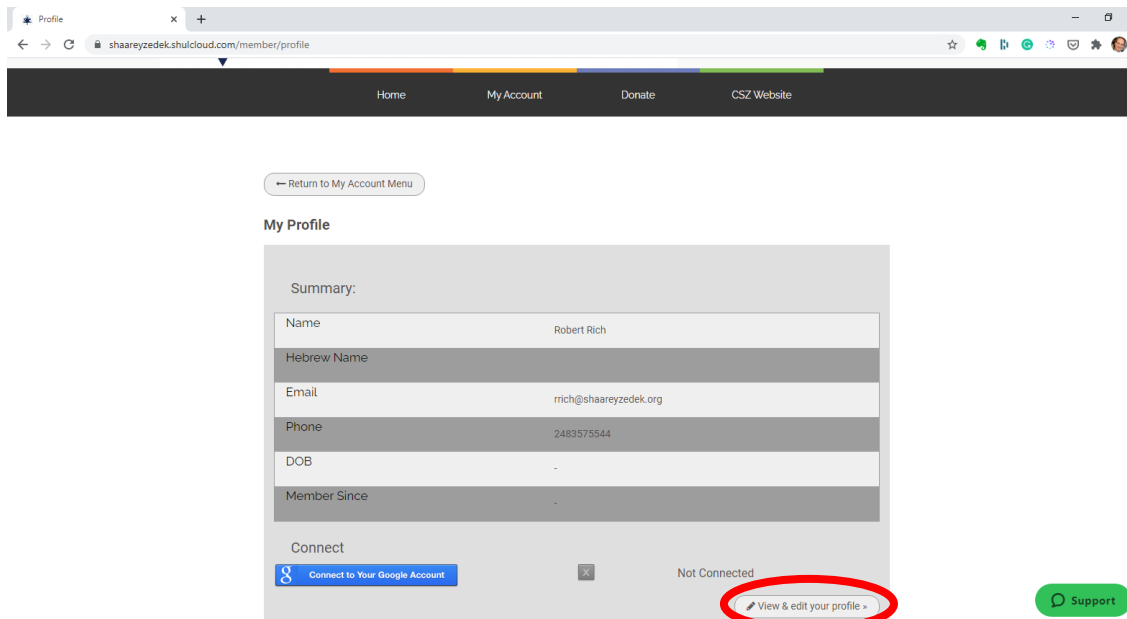
Now that you are logged into your Synagogue account:

## HOW TO UPDATE YOUR PERSONAL INFORMATION

1. Click the My Account tab
2. Click on My Profile



3. Click on View & Edit your Profile



4. Proceed to edit the various tabs at the top of the page; Personal, Contact Info, Business, Lifecycle and Other.
5. Be sure to hit Save Changes to Person at the bottom of the page for your changes to take effect.

## HOW TO UPLOAD A PHOTO TO YOUR PERSONAL ACCOUNT

1. Click on the My Account tab
2. Click on My Profile
3. Click on View & Edit your profile.
4. At the bottom of the personal page it will say 'Picture' click on Choose File.
5. Select a picture from your computer and upload it.
6. Click Save Changes to Person at the bottom of the Person page.

Profile

shaareyzedek.shulcloud.com/member/profile?display=edit#personal

Middle Name

Last Name \*

Maiden Name

Nickname

Suffix

Person Type

Hebrew Name

Mother's Hebrew Name

Father's Hebrew Name

Hebrew Last Name

Other

Tribe

Gender

Permissions  What's this?

Picture  file chosen

6.

Support

## HOW TO UPDATE YOUR FAMILY INFORMATION

1. Click on the My Account tab
2. Click on My Family
3. Click on Edit your Family
4. Choose to edit with Adults or Children by clicking on the appropriate tabs at the top of the My Family Edit page.
5. Under More Info, you may enter your Marital Status.
6. Click Save Changes to Account at the bottom of the page.

The screenshot shows the Congregation Shaarey Zedek website. The top navigation bar includes links for Home, Donate, and Calendar. The main header features the Congregation Shaarey Zedek logo and a search bar. Below the header, a dark navigation bar contains links for Home, My Account, Donate, and CSZ Website. The 'My Account' link is highlighted with a red circle and the number 1. A dropdown menu for 'My Account' is visible, showing options for My Billing, My Family, and My Yahrzeits. The 'My Family' option is highlighted with a red circle and the number 2. Below the navigation bar, a welcome message for Robert Rich is displayed, followed by a section titled 'My Personal and Family Information'. This section contains four tiles: My Profile, My Family, My Yahrzeits, and Edit My Addresses. The 'My Family' tile is highlighted with a red circle and the number 3. Below the 'My Family' tile, a table lists family members. The table has columns for Name (click to edit), Email, and Person Type. The first row shows Robert Rich with email rrich@shaareyzedek.org and Person Type Heads of Household. Below the table, there is a note indicating that the first name indicates primary contact. A red circle highlights the 'Edit your family' button, which is next to the 'Add Person' button. The bottom of the page features a dark footer with links for Home and Donate, and a green 'Support' button.

Powered By ShulCloud

Admin Menu Welcome Robert Rich

Home Donate Calendar

CONGREGATION SHAAREYZEDEK

Home 1. My Account 2. My Family Donate CSZ Website

Click here to setup the Member Screen

Hi Robert,  
Welcome to the member account area. Here is where you can control everything related to your account. Hover over the tiles below to see what each of them do.

My Personal and Family Information

My Profile My Family My Yahrzeits Edit My Addresses

Support

Family

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Admin Menu Welcome Robert Rich

Home Donate Calendar

CONGREGATION SHAAREYZEDEK

Home My Account Donate CSZ Website

Return to My Account Menu

My Family

Name (click to edit)	Email	Person Type
Robert Rich	rrich@shaareyzedek.org	Heads of Household

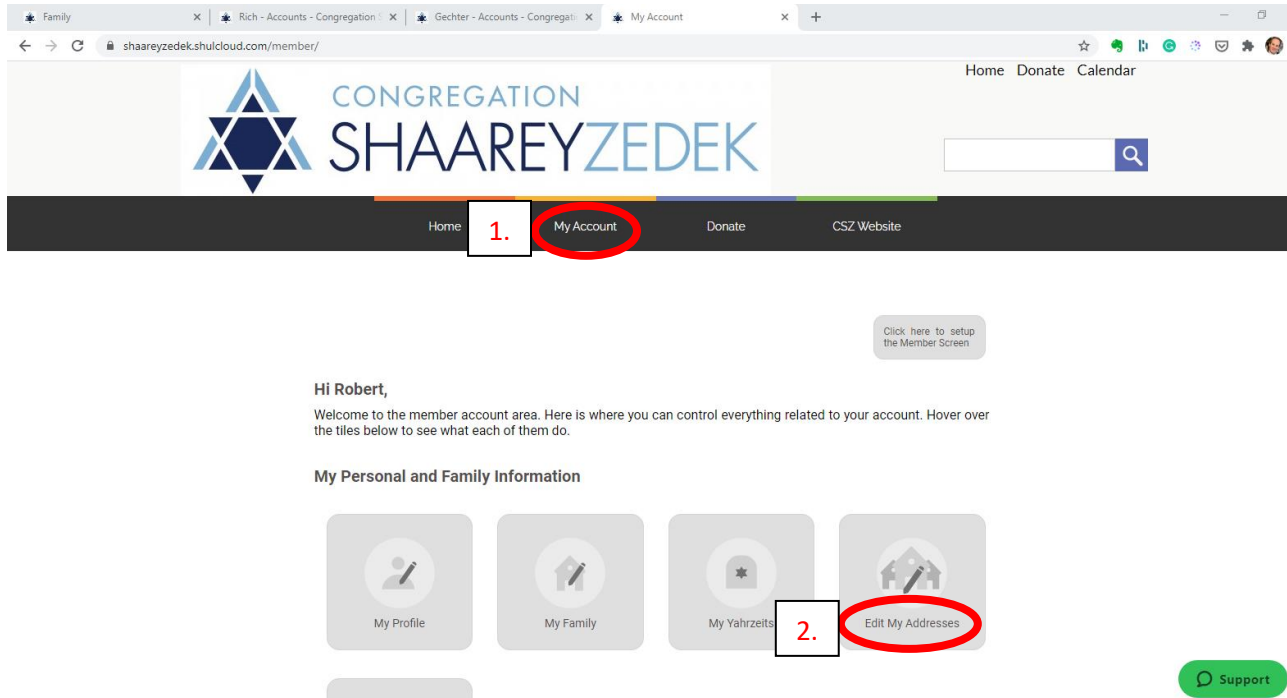
indicates primary contact.

3. Edit your family + Add Person

Home | Donate Support

## HOW TO CHANGE, ADD, OR DELETE YOUR ADDRESS

1. Click on the My Account tab
2. Click Edit My Addresses
3. On the Edit My Address page, click Edit Address.
4. Click on the Address label and make all necessary changes to your current address.
5. Click Done when finished.
6. If you wish to add a new address, click +Add New Address at the top right corner. Enter all the address details and click Done.



## HOW TO ADD A YAHRZEIT TO YOUR ACCOUNT

1. Click on the My Account tab
2. Click Manage Yahrzeits
3. Click +Add Yahrzeit
4. Enter all the information about the deceased, including name (English and Hebrew, if known), date of death, if you wish to mark the English observance click the little check box beside English Observance, choose before/after sunset (this refers to time of death) and Click From English to calculate the Hebrew Date of Death.
5. To enter a mourner, click the Mourners tab at the top of the page.
6. Click Add New Mourner
7. Enter both the relationship and the Mourners name.
8. If you wish to observe Chiyuv, click the little check box for each Mourner.
9. Click Create New Yahrzeit at the bottom of the page.

My Account

Home Donate Calendar

Powered By ShulCloud

Admin Menu Welcome Robert Rich

Home 1. My Account Manage Yahrzeits 2.

Hi Robert,

Welcome to the member account area. Here is where you can control everything related to your account. Hover over the tiles below to see what each of them do.

My Personal and Family Information

My Profile My Family My Yahrzeits Edit My Addresses

Support

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My Yahrzeits

Create New Yahrzeit

5. Mourners

The Deceased: First Name Last Name

The Deceased Hebrew Name: K

Gender of the Deceased: Specify Other Please enter a Gender Choose a Pronoun

English Date: Mar 25 2021 English Observance

After Sunset: No Yes

Hebrew Date: 12 Nissan 5781 FROM ENGLISH

On Leap Years: Observe on Adar 1 43 per synagogue custom

On Non Leap Years: Observe on 30 Shevat as per synagogue custom

Buried Date: Buried Location:

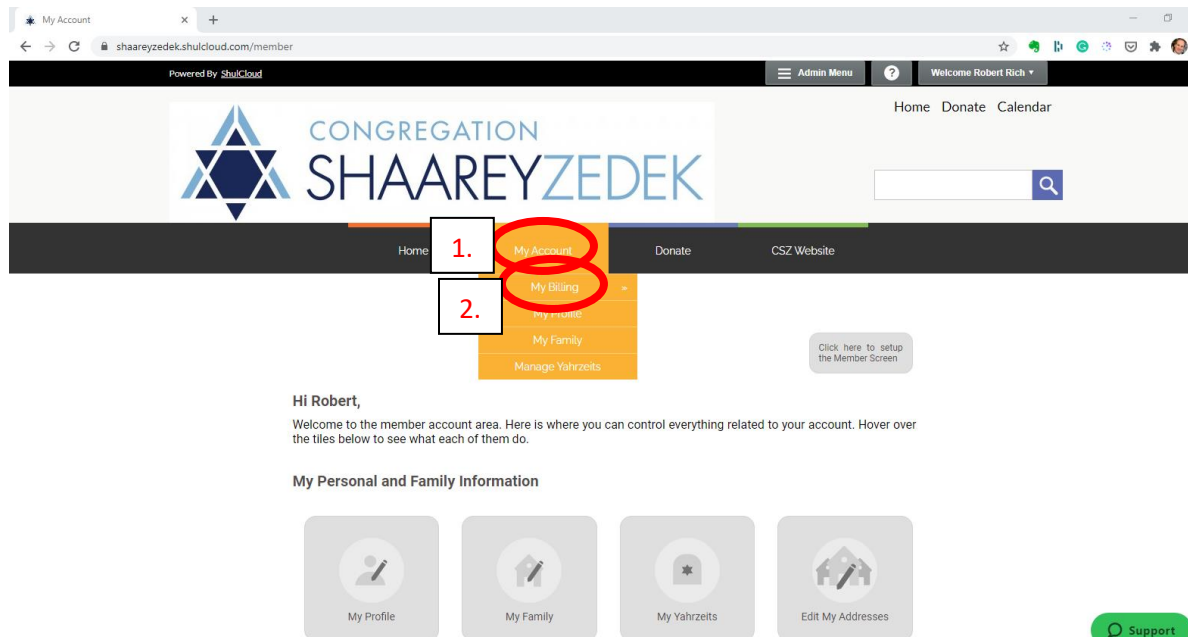
9. Create New Yahrzeit

Support



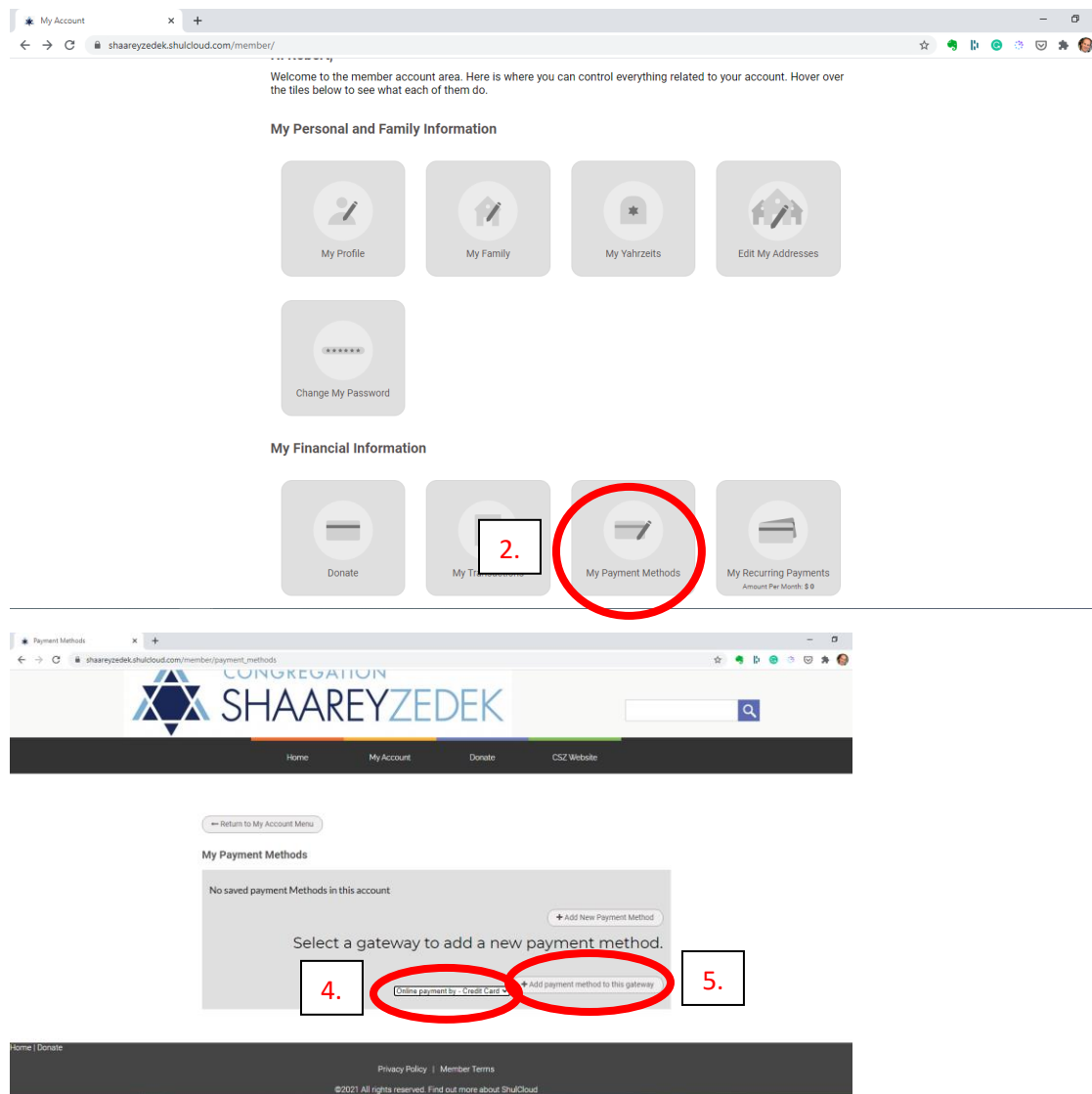
## HOW TO VIEW YOUR FINANCIAL HISTORY AND SEE YOUR CURRENT BALANCE

1. Click on the My Account tab
2. Click on My Billing that pops up
3. At the top of the next page you will see your current account balance.
4. To pay your current account balance click on Submit A Payment.
5. Further down the page you will see your recent transactions
6. To view your entire transactional history, go to the bottom of the page and click View All Transactions.
7. You will then see your past 6 months' history. You may choose a date range at the top of the Filter page to search on. Click Update Filter to run the search.



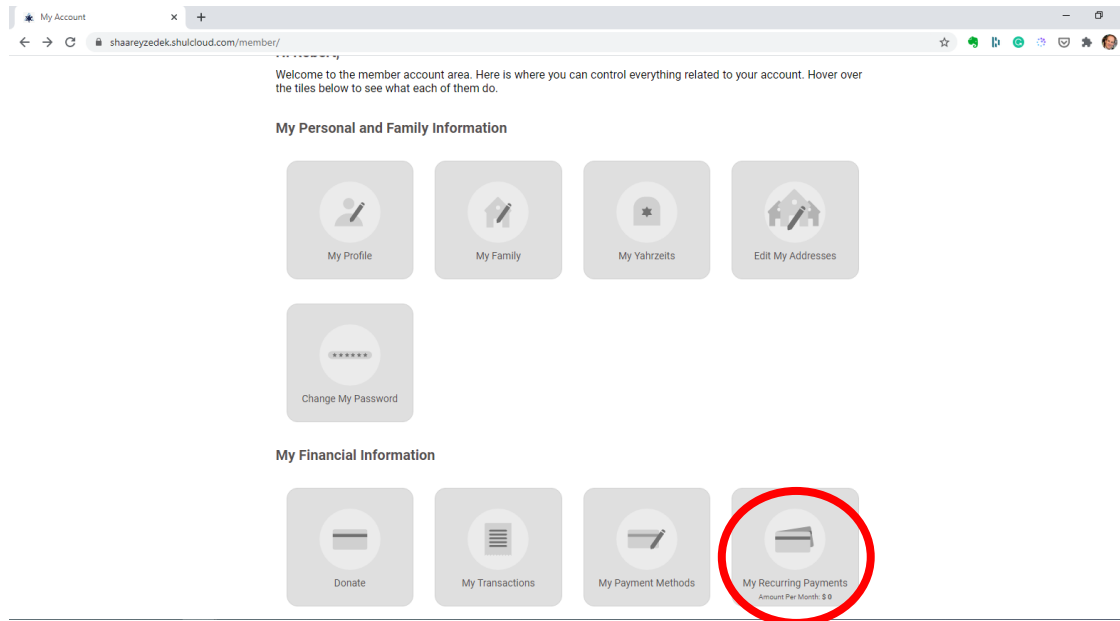
## HOW TO ADD/REMOVE A CREDIT CARD OR ECHECK FROM YOUR ACCOUNT

1. Click on the My Account tab.
2. Click on the My Payment Methods tab.
3. To add a credit card or eCheck account, click the Add New Payment Method button at the bottom right corner of the page.
4. Select whether you wish to add a credit card or eCheck (i.e., ACH) account in the drop down box "Online payment by – "
5. Click "Add payment method to this gateway".
6. Enter your credit card or eCheck information and confirm your contact information. The Synagogue does not store your credit card or eCheck information. Only the last 4 digits and expiration date of the card are kept in the ShulCloud system.
7. Click Save Payment Method at the bottom of the page.



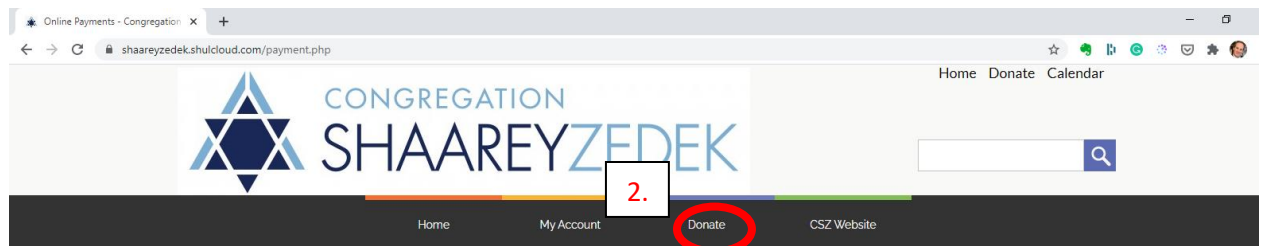
## HOW TO VIEW YOUR RECURRING PAYMENT PLAN(S)

1. Click on the My Account tab
2. Click on My Recurring Payments.
3. You see on the next page a breakdown of any current recurring payment plans you have set up with the Synagogue.



## HOW TO MAKE A DONATION FROM WITHIN YOUR ACCOUNT

1. Login to your synagogue account as described above.
2. Click on the Donate tab.
3. Choose Payment is a Donation. (If you have no current balance, the system will assume that the payment is a donation.)
4. Choose the Fund you wish to donate to under "Type". If you wish to donate to a family fund, please contact the office.
5. Enter the Amount of the donation
6. If you wish to dedicate the donation, choose a Dedication Type in the Dedicate dropdown menu.
7. Enter the dedication information in the box below the Dedication dropdown menu.
8. If you wish to have the Honoree notified of the donation, enter their personal information. If you enter an email address for the Honoree they will be notified via email of your donation.
9. Click on Continue to Payment.
10. On the Confirm Payment page you will see the amount of the donation being made. If you have a credit card on file select the card, hit Confirm and Continue at the bottom of the page and your donation will be processed. If not, select New Online Payment by.
11. Click the Confirm and Continue button.
12. Enter your credit card information and click Pay Now. You will receive an electronic receipt for your donation via email.



### Online Payments

4. Paying as Robert Rich

Type

Amount

Pay this amount

Payment Notes

6. Dedicate

[CONTINUE TO PAYMENT >](#)

Type

Amount \$

Pay this amount

Payment Notes

### Dedicate

6.

7.

Tribute Text, for example: John Doe

### Person to Notify

8.

Salutation

Email  ☐ Unknown

Address  ☐ Unknown

Address Line 2

City  State  Zip

Country

9.

[CONTINUE TO PAYMENT »](#)

## **HOW TO MAKE AN ACCOUNT PAYMENT**

1. Click on the My Account tab
2. Click the My Billing pop-up
3. At the top of the next page you will see your current account balance.
4. To pay your current account balance click on Submit A Payment. You will then be taken to the Online Payments page.
5. Choose Payment is for Account Balance.
6. Enter the amount of the payment.
7. Click on the Pay this Amount dropdown and choose to either make a one time payment or to set up a recurring payment. If setting up a recurring payment, choose the amount of months over which you wish to split the payments
8. Click Continue to Payment.
9. On the Confirm Payment page you will see the amount of the payment being made. If you have a credit card on file select the card, hit Confirm and Continue at the bottom of the page and your payment will be processed. If not, select New Online Payment by.
10. Click the Confirm and Continue button.
11. Enter your credit card information and click Pay Now. You will receive an electronic receipt for your donation via e-mail.