



WELCOME TO YOUR NEW
ONLINE
MEMBERSHIP PORTAL



We're excited to introduce you to your member account on the new Congregation Beth Israel online member system powered by ShulCloud. With this system used by over 1,200 other congregations, you can connect more easily with other members through the online directory, manage your own information and register for events. ShulCloud is designed to provide a secure and private way to view your transaction history, enter payment methods, set up recurring payments and make donations. There is so much you can do when you use your account!

To access your account- please visit our website at www.Beth-Israel.org and click on the My Beth Israel button at the top of the page.

We need just a little help from you to get started. Please take a few minutes to follow the steps below:

1. Click the temporary Set Password link in the announcement email to set your new personal member password (your email address is your username). Each adult member will be able to set up their own access. This link will expire after 7 days, so we'd appreciate your prompt attention. (If your link expired, email your request for a new link to LHirsch@beth-israel.org).
2. Click the My Profile tile to verify and edit your profile information.
3. Click the My Family-Edit tile to verify and edit your family information.
4. Click the My Directory Listing tile to change your directory information and set display and sharing preferences. The directory is accessible to all members.

Now that you've completed the initial set up, it's time to explore! You can access the online portal dashboard from our website by clicking on the "My Beth Israel" link in the upper right corner to see a dashboard of options ("buttons") related to your account, including personal and family information, financial information, congregational mailing information, and school and events information.

On the dashboard, you will find an area called My Financial Information. We know that this may look a bit different from our statements in the past, but we trust you will find the system user friendly. When you choose to use online payment options, note that the Temple and ShulCloud do not store or have access to your bank or credit card information on its servers.

If you would like to make payments by ACH/ECheck you must first set your bank information under My Payment Methods before you make the payment. Click Add New Payment Method, and on the drop down, select New Online Payment by echeck. Click Add card to this gateway and you will then setup your account. Please note that, due to security reasons, anyone previously signed up for monthly or quarterly "Auto Pay" will need to set up auto pay in ShulCloud. The related financial information did not transfer over to the new system.

This manual will help you set up your account, answer common questions regarding payments, donations, account information, and event registration.

We know you may have questions, and we encourage you to explore the new system. If you're having difficulty logging on, please give us a call in the office at 713-771-6221 and we'll be happy to help. If you have comments to share about the new system, please feel free to send us an email at info@beth-israel.org

Thank you for your patience as we all learn a new system, and for partnering with us to make the user experience more joyful for the Beth Israel community!

Click on “My Profile” to update your basic information



Please make sure your contact information is up to date.



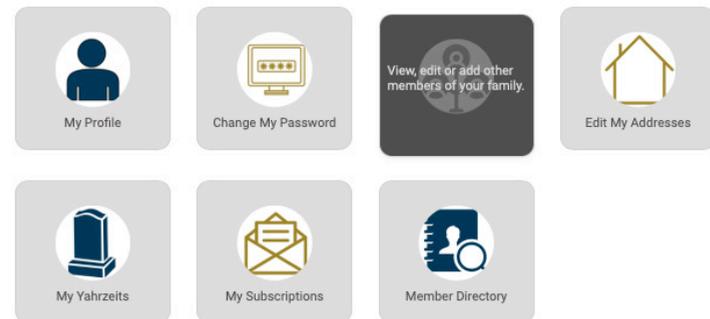
OUR WEBSITE HOME MY ACCOUNT DONATE CALENDAR

← Return to My Account Menu

My Profile

Summary:	
Name	Laura Kaplan
Hebrew Name	
Email	shulsolutions@gmail.com

Tap on “My Family” to see who is listed in your household and to tell us more about them.



On your “My Family” dashboard, you can see who is listed in your family, the primary contact, and you can add people to your family account. Click on “Add a Person” to add individuals such as your parents or children.

For each person in your household, you can add personal details, contact info, business info, lifecycle dates, and other info.

[← Return to My Account Menu](#)

My Family - Create New Profile

[Personal](#) [Contact Info](#) [Business](#) [Lifecycles](#) [Other](#)

Login Info

Login Email

Login Password

Confirm Password

None Set! To set, type a new password (min 8 letters).

Person Info

Title

First Name

Middle Name

Last Name

Maiden Name

Nickname

Suffix

To add yahrzeits to your account, click on “My Yahrzeits.” Here you will see the yahrzeits you have entered. You can add a new yahrzeit using the “Add Yahrzeit” button.

[← Return to My Account Menu](#)

My Yahrzeits

Create New Yahrzeit

[Info](#) [Mourners](#)

The Deceased:

The Deceased Hebrew Name:

Gender of the Deceased:

English Date: English Observance

After Sunset: No Yes

Hebrew Date:

On Leap Years:

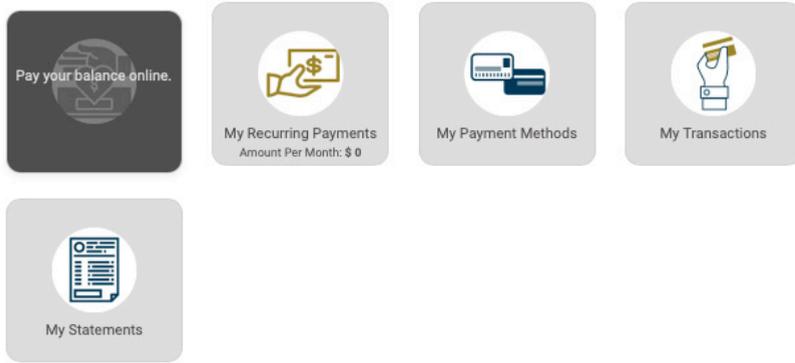
Buried Date:

Buried Location:

[Create New Yahrzeit](#)

To make a payment (for dues, a class, dinner, event, etc.) or a donation, please tap on the first tile.

Financials



Within the Donations & Online Payment section, you can select the type (class, dinner, event, etc.), your payment amount, payment schedule, and dedication.

Online Donations & Payments

Paying as
Account has a balance of \$0.00

3rd Party Payer

Payment is for account balance.
 a donation.

Amount

Pay this amount

Payment Notes

If you would like to make payments by ACH/ECHECK you must first set your bank information under My Payment Methods before you make the payment. Click Add New Payment Method, and on the drop down, select New Online Payment by echeck. Click Add card to this gateway and you will then setup your account.

[← Return to My Account Menu](#)

My Payment Methods

No saved payment Methods in this account

[+ Add New Payment Method](#)

Select a gateway to add a new payment method.

New Online payment by - Credit card

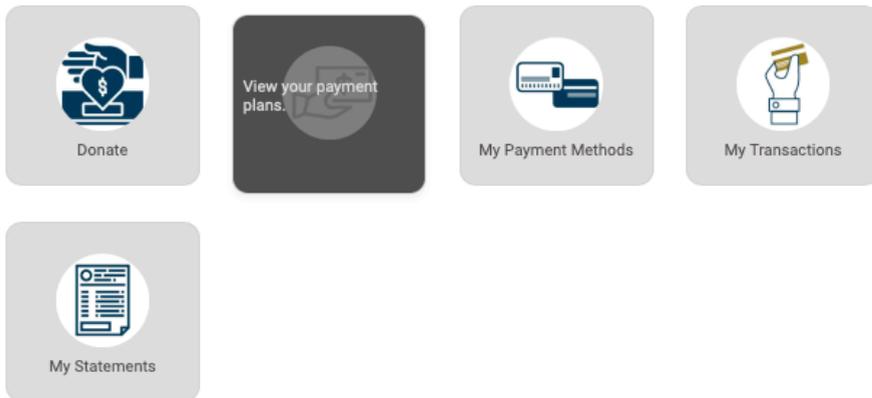
New Online payment by - echeck

[+ Add card to this gateway](#)

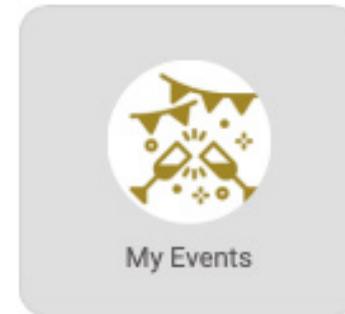
If you would like to update a payment schedule, such as how much and how often you make a contribution, you can do so by selecting the “My Recurring Payments” tile.

Each event will have a registration page that is linked through the calendar and the invitations that are sent out. To view the events you are registered for, you will tap the “My Events” tile.

Financials



Events



If you need help with navigating through the membership portal, please contact Liza Hirsch, Membership & Executive Office Manager at LHirsch@beth-israel.org or 713-771-6221 ext. 301.