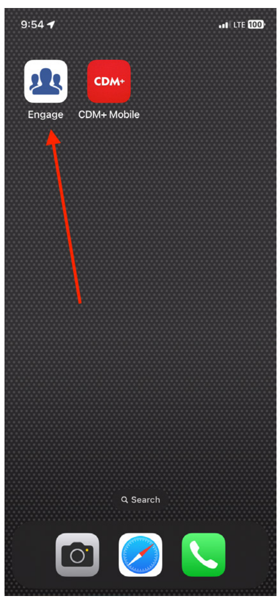
Engage Giving & Online Payment Processing

CDM+ Engage Giving

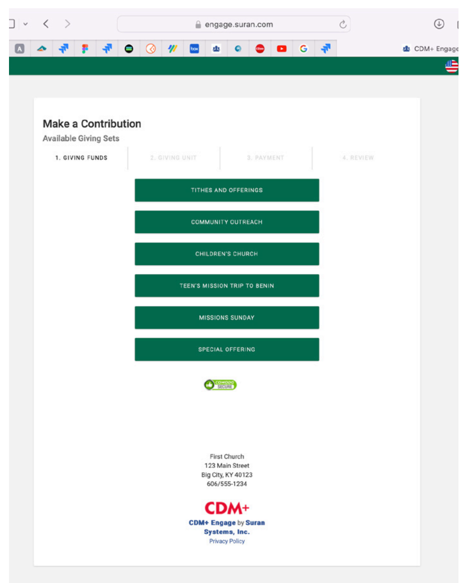
Suran Systems provides online giving through Engage Giving. In the first part of this class, we will cover the setup, administration, and use of Engage Giving.

Many online giving options are available to today's nonprofit and faith-based organizations, but only CDM+ Engage Giving interacts with your CDM+ database, automatically entering online gifts into CDM+ Contributions and Fund Accounting thereby freeing staff for other ministry-related activities.

With CDM+ Engage Giving, anyone can donate securely and easily to any fund(s) you designate, using a debit or credit card or an ACH withdrawal from a checking or savings account simply by visiting your website or using the smart device "app". A single gift may be split among several funds with the receipt detailing how the gift was allocated.



Engage Giving button
on mobile device



Engage Giving link
on organization website

CDM+ Engage Giving is not an app; it creates a URL for people to use to make electronic contributions. Mobile devices offer a procedure to "make" this URL appear as an app button on the mobile device. Engage Giving offers the same experience – a clean display, smooth operation, and the ability to make a donation in less than 30 seconds – from a smart phone, a tablet, or a browser.

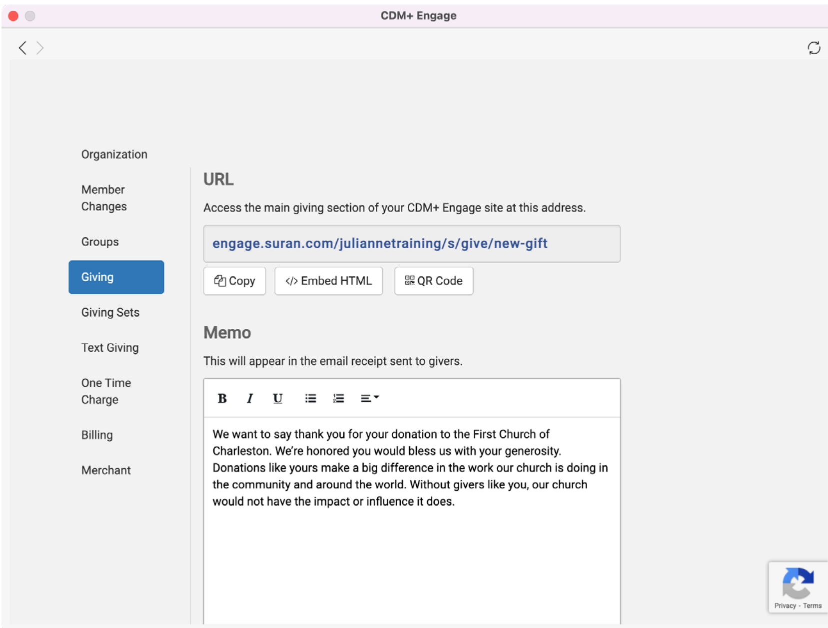
Engage Giving gives members or visitors the ability to create an account or log into their existing account, make a one-time immediate gift, set up a recurring gift schedule, maintain their payment sources, review any existing recurring setups, to view a gift history, print a giving statement all from their web access point of choice – smartphone, tablet or browser. Engage Giving integrates seamlessly with a member's Engage account, if the church/organization offers Engage Member.

Setting Up Engage Giving

Log into CDM+. Go to **Program ▶CDM+ Engage ▶ Settings**

Engage Giving Options

There are many options available under the **Giving** menu in Engage Settings.



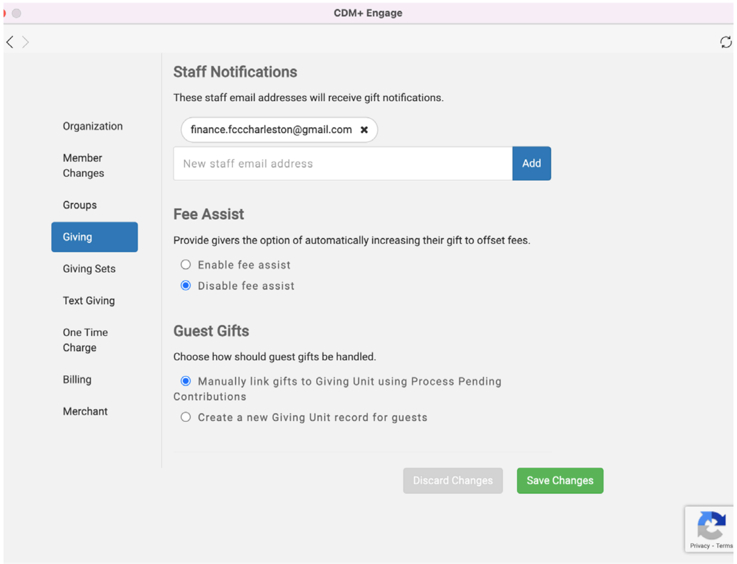
URL - The Giving URL is an extension of the Engage URL created as part of setting up Engage. This address can be used as the link for a **Donate Now** button on your website. It can also be converted to a **QR code** that someone can scan from a flyer, bulletin, or pew card. Use the following buttons:

- **Copy** to copy the URL to your clipboard
- **Embed HTML** to put on your website
- **QR Code** to download a QR code that will access your giving page

Memo - This message will be included in the email acknowledgement to the giver. This could be a thank you note, or include text to indicate that the gift is tax deductible.

Card Payments and ACH Payments – select from available Payment Types. These are created in CDM+ Desktop Master Coding System. We suggest different payment types for Engage gifts and also separate types for card versus ACH gifts.

NOTE: The Payment Types selected here do not affect what types of payment types can be used when giving online. This setting is how you will track these payments on your reports.



Staff Notifications – enter staff email addresses to receive emailed notification of online giving activity. Multiple email addresses may be entered, separated by a comma.

Fee Assist – Enable or Disable Fee Assist. When enabled, the donor will be asked whether they wish to "pay the transaction fees" thereby ensuring that the organization receives 100% of the donation. If enabled, you will next be prompted to select a giving fund that should receive these fee assist donations. We suggest that you set up a separate giving fund for fee assist donations.

Guest Gifts – Engage giving provides the tool that members/donors can log into their own Engage account to make a donation but it also allows for a Guest to make a gift without logging into an account. This setting determines how CDM+ Engage handles Guest Gifts.

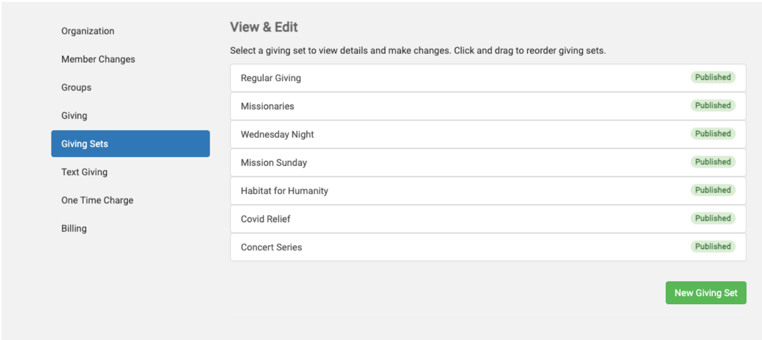
- Manually link gifts to Giving Units using CDM+ Desktop **Process Pending Contributions** or
- Create a new Giving Unit record for these guests.

Manually linking requires the staff to access Process Pending Contributions in CDM+ Desktop to either

- Link the gift to an existing giving unit (an existing donor that simply did not log into their Engage account)
- Create a new Giving Unit to link this gift to, or
- Link the gift to a miscellaneous giving unit, such as ZZVisitor.

Create a new Giving Unit record for these gifts. When this option is selected a guest gift will automatically create an Address record, an Individual record and a Giving Unit record and will record the donation to this new giving unit. This may result in duplicate address, individual and giving unit records in your database. CDM+ Membership and Contributions provide tools to merge duplicate records.

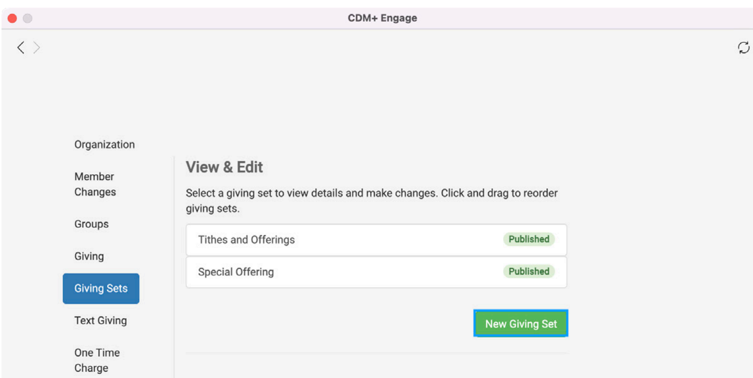
Create Giving Sets and Select Giving Funds



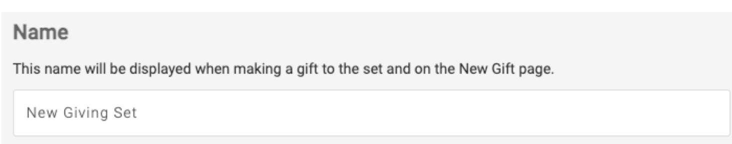
Giving sets can also be referred to as Giving Pages and represent a collection of one or more giving funds to which a donor may give to. Each Giving Set has its own link (or URL) which enables you to populate other webpages with the direct link to a specific giving fund.

Giving Sets allows you to group giving funds, making it easier both for donors to find destination funds and to establish links for specific fundraising campaigns. For example, if your organization is involved with a non-profit and have a dedicated webpage on your website for them, that dedicated webpage may contain the link to the non-profit Giving Set only.

Click **New Giving Set**.

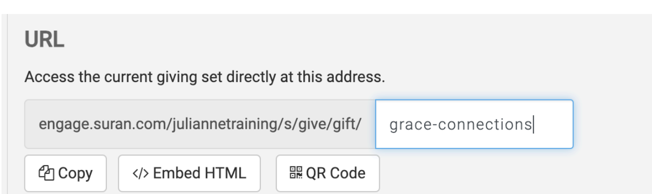


Enter the Giving Set name. This name will be displayed when making a gift to the set and on the New Gift page.



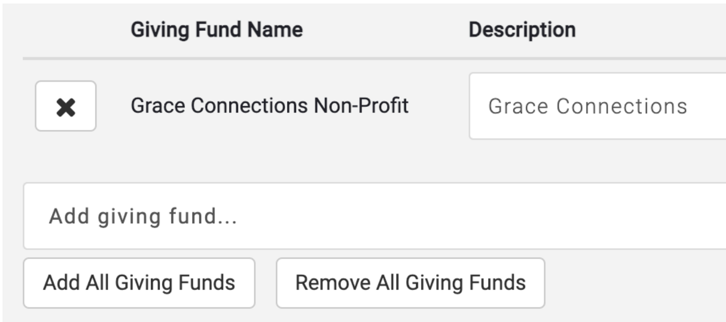
Enter the Giving Set name. This name will be displayed when making a gift to the set and on the New Gift page.

Either accept the suggested URL for this Giving Set or enter a different one.

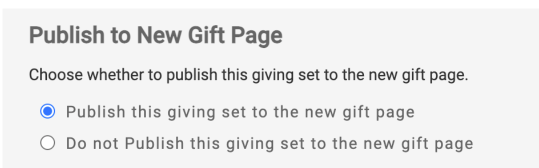


Select Giving Funds - These giving funds will be available when a giver selects the current giving set. The description will be displayed as the giving fund name on Engage. The Giving Fund Name and the Description do not need to match.

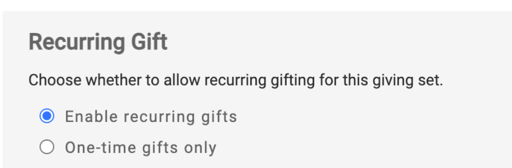
Clicking **Add Giving Fund** will open a display of each ACTIVE giving fund set up in CDM+ Desktop Contributions. You may select as many giving funds to include in the set. You must select at least one giving fund in order to have this Giving Fund Set be active. While there is no limit to the number of giving funds that may be included, it is a good practice to limit the number to what will display on one mobile phone screen.



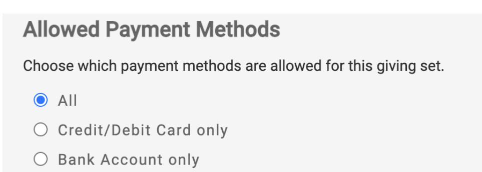
The next option you have is to publish this set to the **New Gift Page**. If you do not publish this set, you will need to place the Giving Set URL (set on the prior page) somewhere on your website in order for people to use it to make donations.



Next, you have the option to enable recurring gifting for this giving set. If enabled, the donor will be able to set up an automatic, recurring donation to this giving set (weekly, monthly, annual, etc.)



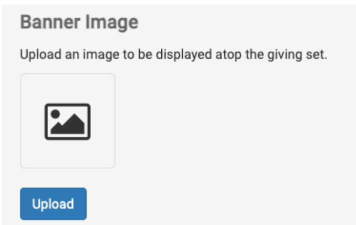
If you wish to limit payment methods that can be used with this Giving Set, make your selection here.



Upload an image to be displayed atop the giving set.

You also have the option to enter -

- Header text which will sit atop the giving set
- Footer text which will sit at the bottom of the giving set
- Background Color
- Background Image which will appear in the background of the giving set



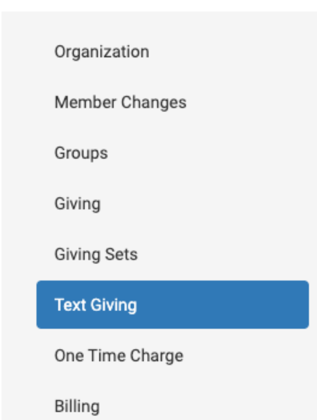
Engage Text Giving

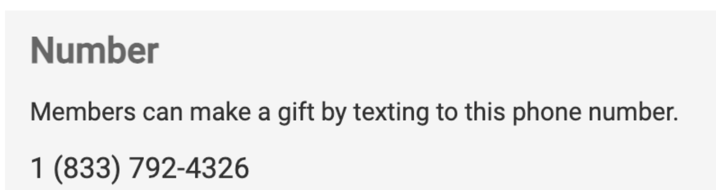
Engage Text Giving is an optional add-on subscription to Engage and allows donors to send a SMS text message to a phone number assigned to your organization. The text message is simple – an amount and a short code.

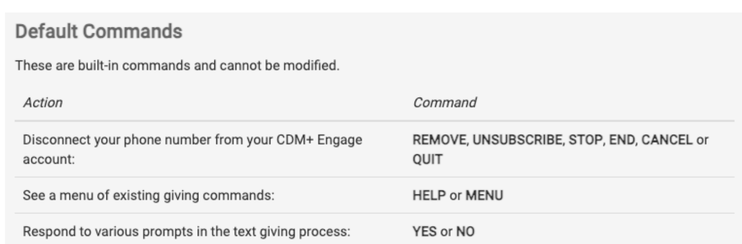
When you enroll, you will determine whether you want a local phone number or a toll-free phone number as the number that your donors will send a text message to with their donation. There is a registration process for both types, which can run up to a month. Toll-free numbers are recommended as they are the most cost-effective, having a lower monthly charge and no setup fees.

Once you have enrolled and received your Engage Text Giving number, Text Giving must be configured.

On the Engage Administration screen, select Text Giving.





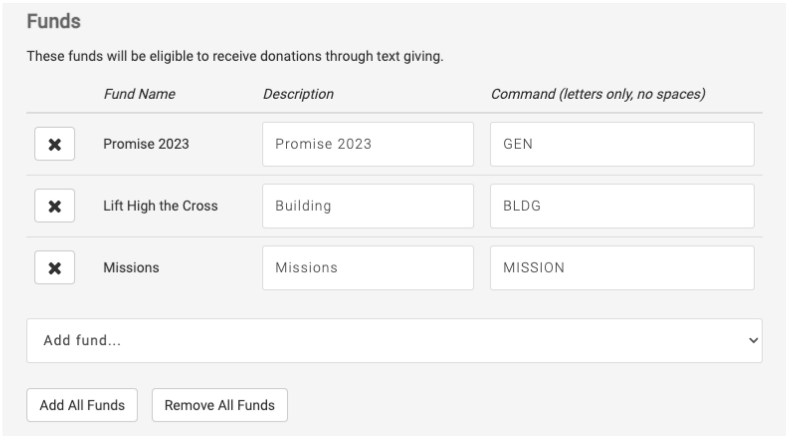


Default Commands

These are built-in commands and cannot be modified.

Action	*Command*
Disconnect your phone number from your CDM+ Engage account:	REMOVE, UNSUBSCRIBE, STOP, END, CANCEL or QUIT
See a menu of existing giving commands:	HELP or MENU
Respond to various prompts in the text giving process:	YES or NO

In order for donors to make a text gift, you must first set up those giving funds that you wish to make available to text giving.



Click "Add fund…" to open a drop-down list of giving funds already established in CDM+ Desktop Contributions. Once selected, the Fund Name is populated. The Description field is also populated with the same description but you can alter this and provide a different description. Lastly, you will enter the command or short-code that the donor will use when making their text gift. As the command is part of the text message sent by the donor, it is recommended that you keep these commands fairly short.

In the example above, three giving funds have been selected and short code commands set up. The available giving funds are from those already set up in CDM+.

The command REMOVE is automatic and if texted to your Engage Text Giving phone number, will disconnect the mobile phone number from the donor's Engage account.

Administering CDM+ Engage Giving

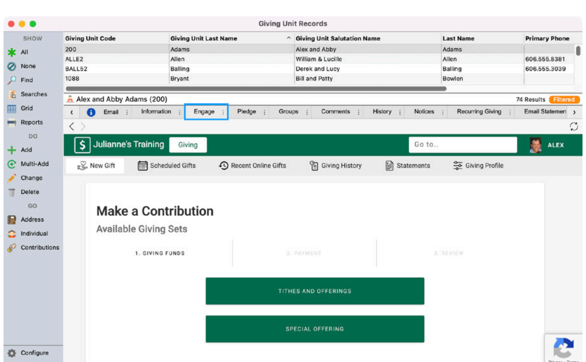
Administers can work with member/donor Engage Giving accounts within CDM+ itself. This allows staff to:

- Create Engage accounts for members (not covered in this class)
- Create one-time electronic donations for members
- Maintain member's payment methods
- Create and maintain recurring scheduled donations for members

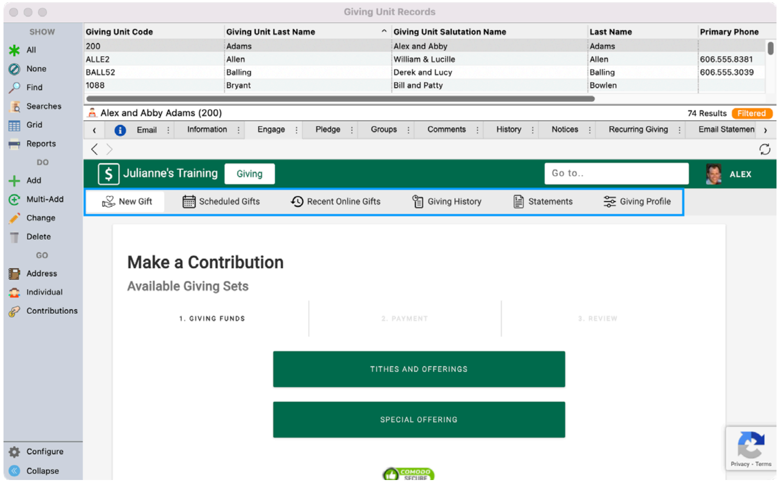
This is done on the Giving Unit Record window.

Administering Member's Engage Giving Account

In CDM+ Contributions, the Giving Unit Record window now offers a new tab, Engage. Selecting this tab opens CDM+ Engage Giving with the giving unit selected.

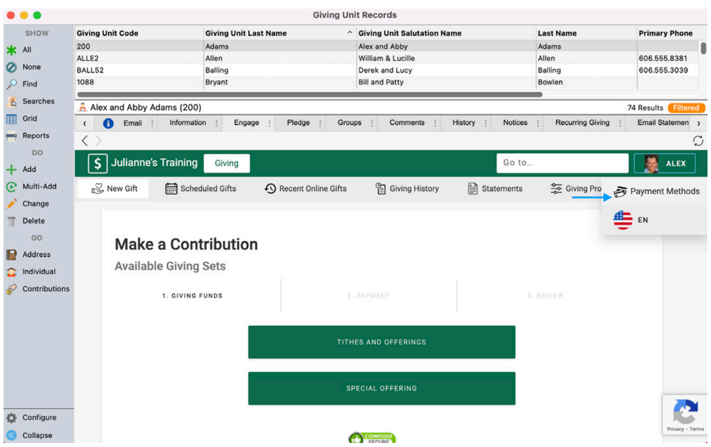


Other Engage activities such as viewing **Scheduled Gifts**, repeating **Recent Online Gifts**, or viewing **Statements** can all be done through the Engage menu tools.



You may begin the process of creating an electronic gift, just as though the member logged into their own Engage Giving account.

To help manage a member's **Payment Accounts**, click their name to see the Payment Account menu to go to that page.



Using Engage Giving – Creating a Member Account

Members initially need to visit the organization's Engage Giving website using the browser on their computer or smart device. Once there, they have an option on the smart device to add this link to the Home screen of their device.

The Engage Giving website can be provided to prospective donors as a URL or as a QR code.

As a URL:

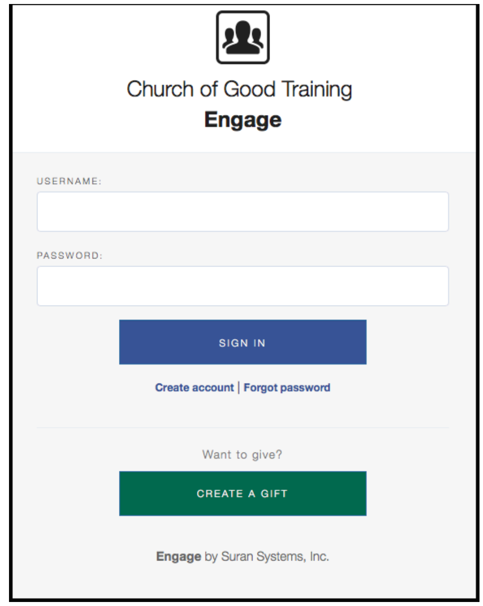
https://engage.suran.com/[your organization]/s/login

As a QR code:

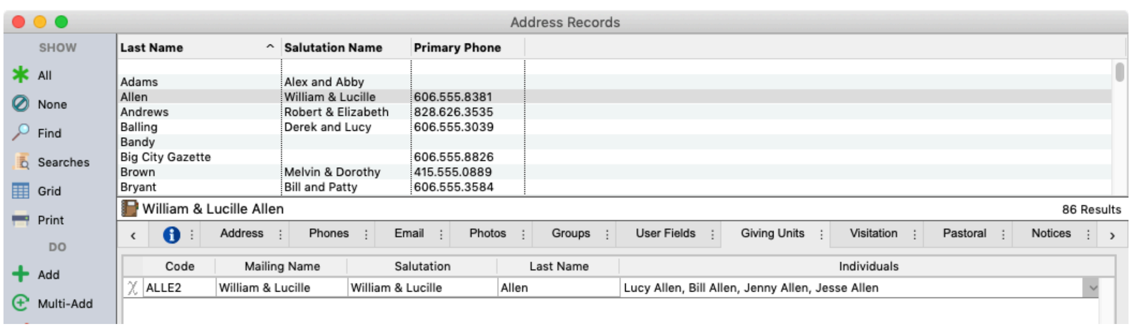
A QR code is simply a graphic representation of a URL. You can download a QR code directly from the Engage Settings and share it on signs, bulletins, or anywhere you want to promote Engage.

When launched, the first thing the donor will notice is that Engage Giving is personalized, displaying your organization name and logo, if uploaded, at the top of the screen.

In order to create an account, a donor does NOT need to be in your CDM+ Membership Database. If the email address used during the registration process is not located in your CDM+ Membership Database, an Address, Individual, and Giving Unit record will automatically be created and tied to the Engage account.



▶ Membership ▶ Address Records ▶ Giving Unit



Also, we recommend the Address Record for the Giving Unit to have a correctly formatted address and phone number. For an address to be complete, there must be a street address in at least one of the address lines.

A little work in your CDM+ database before or sharing the link to your Engage Giving URL will help make the login process go smoother for your members. We suggest you do the following:

Clean up your Address Records, checking that:

- All **Individuals** are linked to their **Giving Unit**
- **Addresses** have a street address

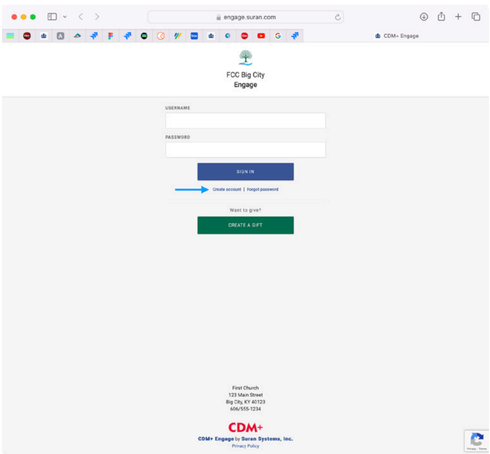
Contact your givers explaining:

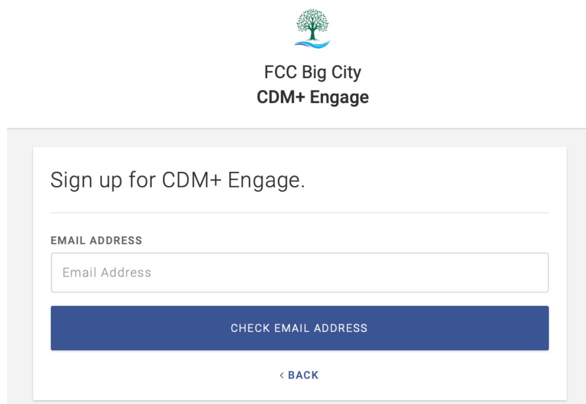
- Their email address will be used to identify their CDM+ account to connect to Engage Giving.
- They will be able to securely view Giving History in addition to setting up recurring gifts.
- They will be able to print their giving statements.
- Their email address(es) will never be published without permission.

Creating a New Account – Members

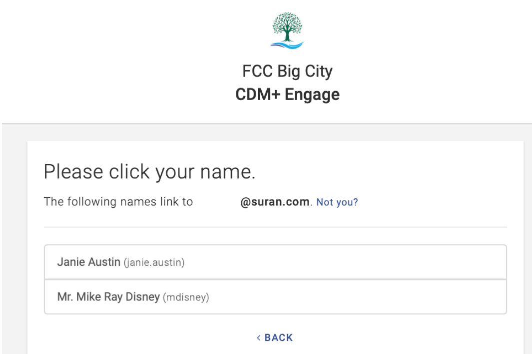
Your members will navigate to your Engage URL, and each person can create their own Engage account, which consists of a Username and Password of their choosing. A valid email address is required. The on-screen prompts will direct them through the following steps. The process to reset a forgotten password is the same as setting the password when the account is created and is also covered below.

When a member wants to create a new account in Engage Giving, they will select **Create Account** link from the Engage login page.

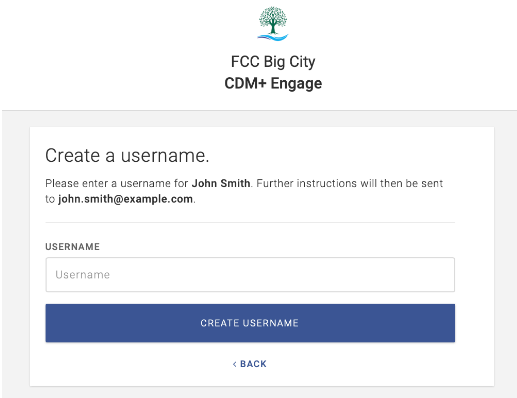




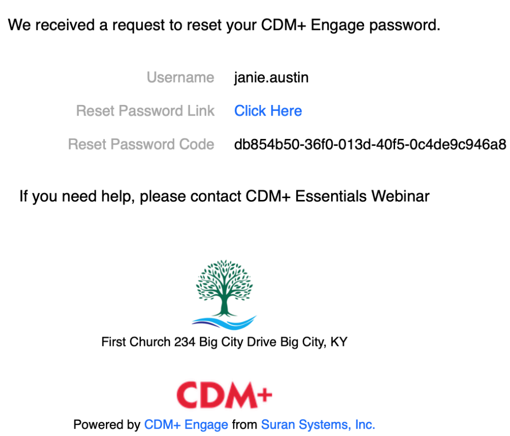
The member will enter their email address and click **Check Email Address**. If there are multiple names linked to that email address in your CDM+ database, those names will be displayed and they will select their own name from the list.

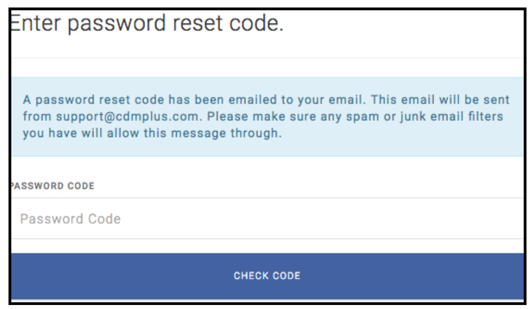


The next prompt will ask the member to create a Username. This username will be used to login into Engage



An email will then be sent to the email address entered. This email will contain a password code which is then used to set (or reset) the member's password.





The member will either:

Click the **Reset Password** link in the email, or

Navigate to the URL provided in the email message and copy/paste the temporary password into the Password Code box and click **Check Code**.

The member will then create a new password and click **Submit**. They will be redirected to the Engage Giving URL.

NOTE: *The member may reset an existing (forgotten) password simply by clicking the Forgot Password link on the Engage Giving login page and following this procedure.*

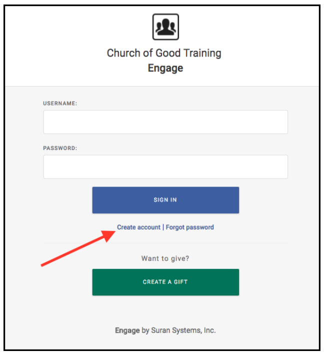
Creating A New Account – Visitors/Guests

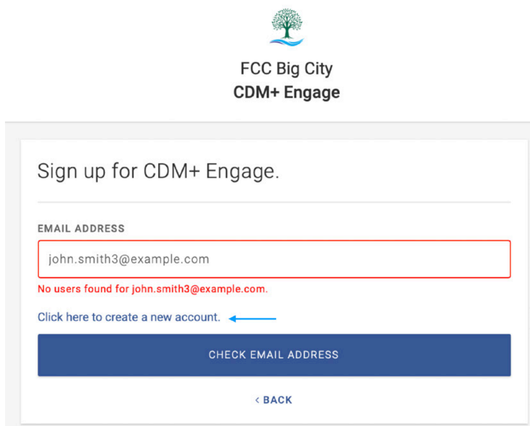
As mentioned above, to create an account, a donor does NOT need to be in your CDM+ Membership Database. If the email address used during the registration process is not already in your CDM+ Membership Database, the visitor/guest can still create an Engage Giving account. When the account is created in Engage, an Address record, Individual record, and Giving Unit record will be created in CDM+ and tied to the visitor/guest's Engage account.

This capability is controlled by the Engage settings. Here, the organization may elect to allow or not allow the automatic creation of visitor/guest accounts.

Obviously, the benefit of allowing this is to allow visitors/guests to make and schedule recurring contributions without having to contact the organization office.

When a donor whose email address is not in your CDM+ database creates an account in Engage Giving, they select the same **Create Account** link on your Engage Giving login page. The visitor/guest will also enter an email address and click **Check Email Address**.



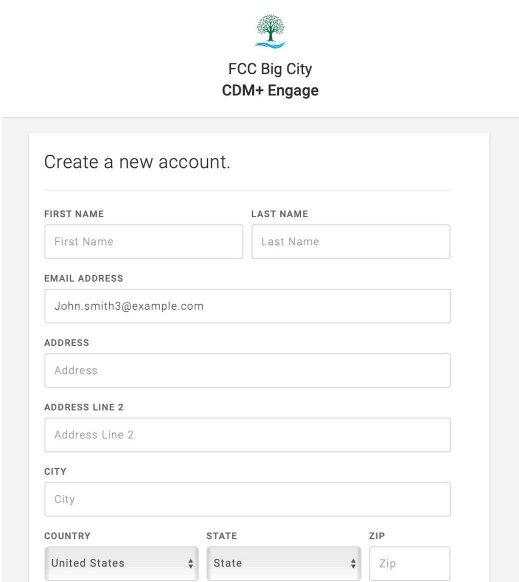


Engage will alert the visitor/guest that the email address was not found and will prompt the person to **Click here to create a new account**.

Here, the account creation process differs from that faced by the member logging in for the first time.

For members, it is assumed that the member's mailing address is already in CDM+. For visitors/guests, Engage will prompt the donor to provide their mailing address. All fields are required.

After completing the required information, the visitor/guest will click **Create Account**.



The remainder of this process is the same for visitors/guests, as that described for members on the preceeding pages.

The visitor/guest is prompted to create a username. An email is sent to the visitor/guest at the email address provided with a link and a Password Code. The visitor/guest can click the **Reset Password** link, or they can copy/paste the URL provided into a browser, copy/paste the Reset Password Code, and click **Check Code**.

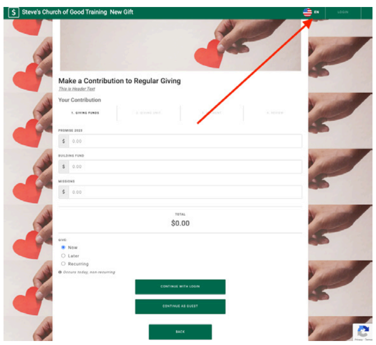
The visitor/guest is then prompted to create a password for future use.

The visitor/guest with an Engage Giving account may reset an existing (forgotten) password using the Forgot Password link on the Engage Giving login page.

Using Engage Giving – Making a Donation

Engage Giving offers two different ways for a member or visitor to give: with or without logging into an account.

Guest Giving (giving without logging in)

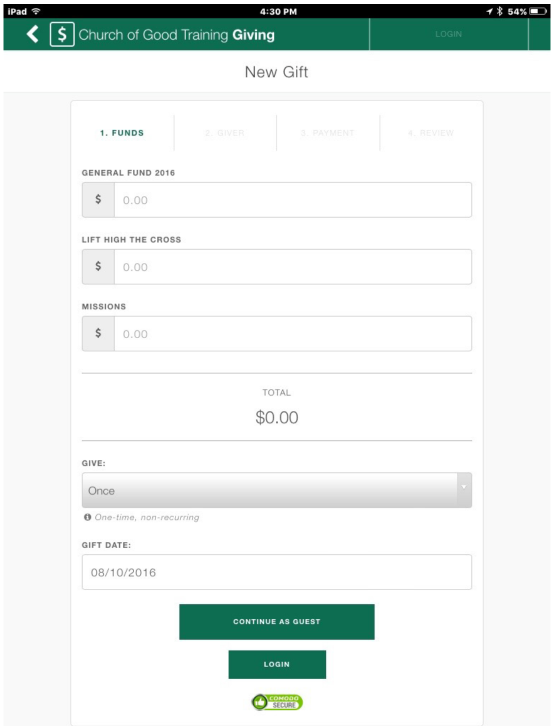


Clicking the green Create a Gift button will open the "New Gift" entry screen.

Depending on the setting for Recurring Gifts in Engage Giving Setup, the member or visitor will enter the frequency of the gift. The default is once.

New – Giving Pages can now translate into Spanish. Click icon in upper right area to toggle between English and Spanish.

Giving Funds selected at the time of setting up Engage Giving are presented to the donor.



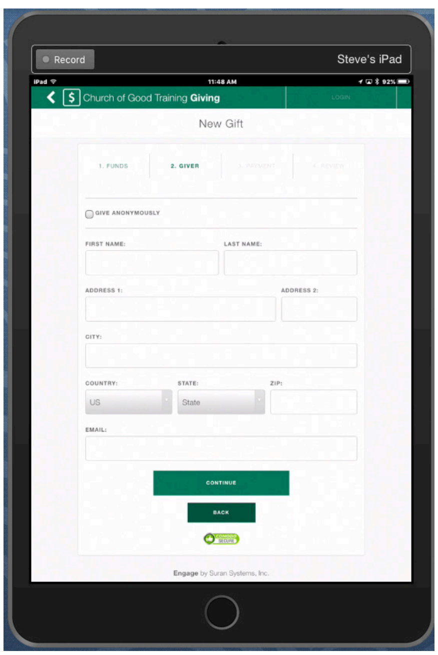
The giver can choose one, multiple, or all Giving Funds for this gift.

The giver will enter the desired amounts to the selected giving funds.

The giver will enter the frequency of the gift. The default is once.

If scheduling a future or recurring gift, the giver will enter the date of the gift. The default is today's date.

If the giver does not want to Login, they can click the green "Continue as Guest" button.

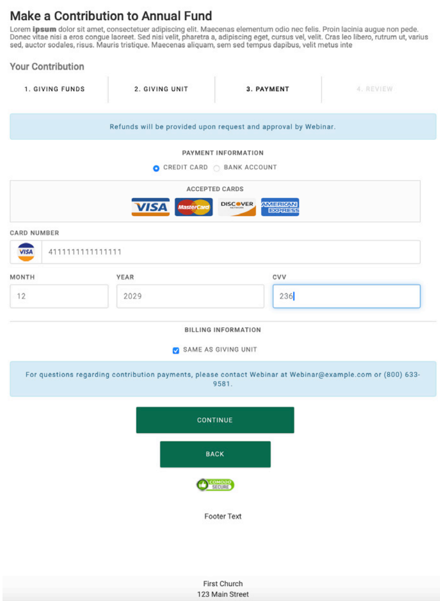


The next screen prompts the donor to enter their name, postal address, and email address. This screen also offers the donor the option to **Give Anonymously**. If the Guest Gifts option in Engage Giving setup is set to automatically create a new Giving Unit for guest gifts, or the gift is recurring, Give Anonymously is disabled.

For the recipient of the funds (you, the CDM+ user), there are important differences behind the scenes between "Giving as a Guest" or giving Anonymously.

Both Guest Gifts and Anonymous Gifts use the "Process Pending Gifts" function in CDM+ Contributions to link gifts to an existing giving unit, create a new giving unit, or link to a ZZVisitor type giving unit, but:

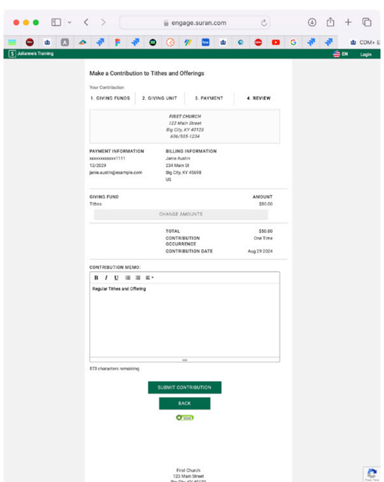
- With an anonymous gift, the Billing name/address is NOT passed into CDM+ and the "Process Pending Gifts" process shows these as coming from an "Anonymous Giver."
- With a gift that is not anonymous, the giver's name, address, and email address are passed into CDM+.



The next screen offers the funding source – credit, debit card or bank ACH – whichever payment methods are select on the giving set setup.

The billing information "Same as Giver" checkbox defaults to checked. If the giver unchecks this box, they are prompted to provide a separate billing address.

After completing the payment information – and the billing address if they unchecked "Same as Giver – the donor will click or tap **Continue**.



Before the gift is submitted, the giver is presented with a confirmation screen asking them to verify the information captured on the preceding screens.

If FEE ASSIST is enabled, the donor check the box on the line reading - I would like to increase my donation to offset processing fees" appears. If they do, CDM+ Engage will calculate and display the added fees.

On this confirmation screen, a gift memo box is offered where the giver can make any special notation about this donation.

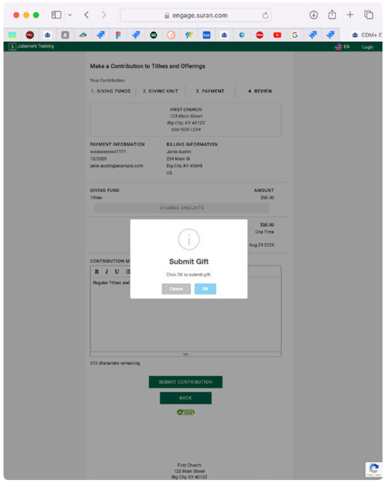
If needed, the giver can click or tap the **Back** button to make changes.

Once satisfied with the details presented on the confirmation screen, the giver with click or tap **Submit Contribution**.

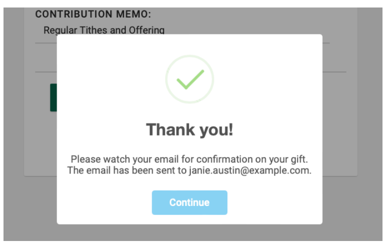
A **Submit Gift** pop-up window appears with two options: **Cancel** or **OK**.

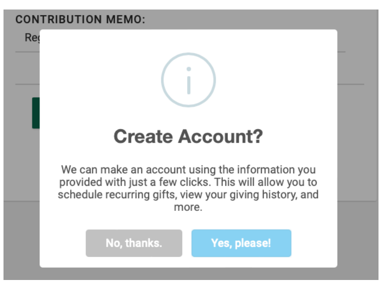
To proceed with the donation, the giver will click or tap **OK**.

At this point, the gift is being processed. While it processes, three dots appear and move, indicating the process is working.

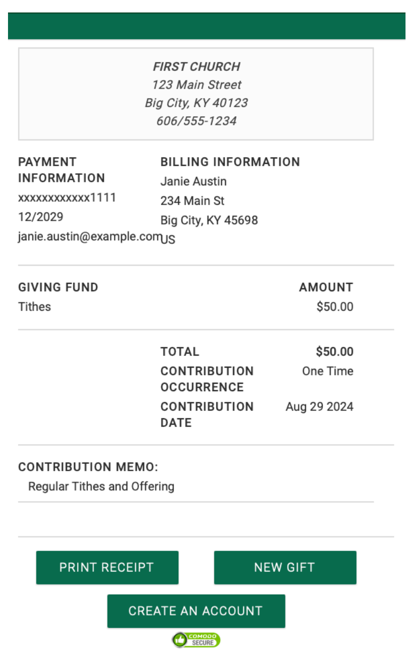


Once the gift has completed processing, the **Thank you** Window appears. After clicking **Continue**, Engage will ask the giver if they want to create an account. If the giver clicks Yes, they will be directed to create an account as described above. Engage will use the email from the gift to attempt to match the giver to an existing record in your CDM+ database. If a new record is created, Engage will use the address information from the gift to create the new record. In either event, the payment information and gift will be linked to the new account once logged in.

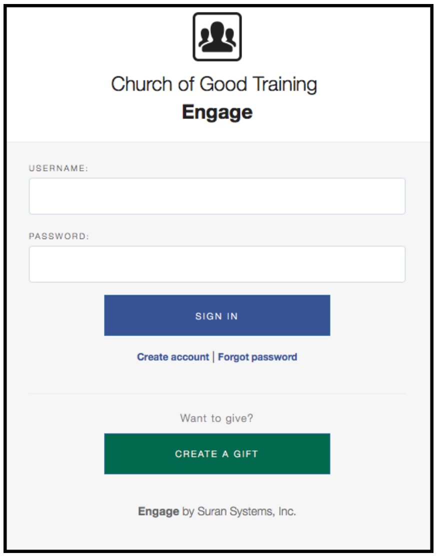




If the giver bypasses account creation, they will have an option to Print Receipt or make a new gift.

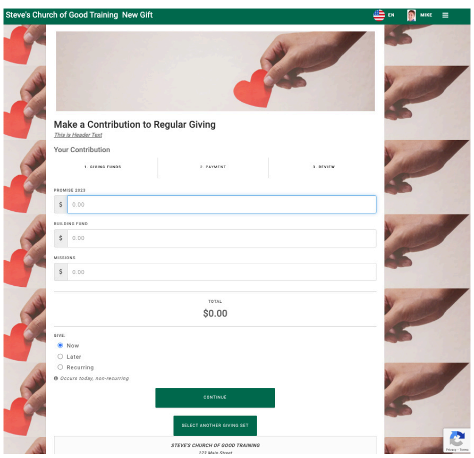


Sign In to Give – Donor Has (or will create) An Engage Giving Account



The donor will enter a username and password and click **SIGN IN**.

Note that the donor can also create an account or request a password reset from the login screen.



The **New Gift** entry screen appears.

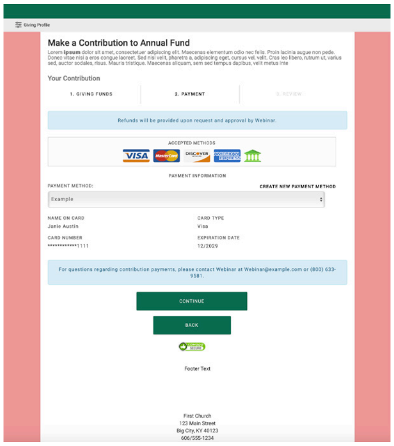
Again, the selected Giving Funds or Giving Fund Sets are presented. The donor or visitor can choose one, multiple, or all Giving Funds for this gift.

The donor or visitor will enter the desired amounts to the selected giving funds.

The donor or visitor will enter the frequency of the gift. The default is once, but may be changed to one of several common frequencies. The donor will open the dropdown menu to select a different frequency.

The donor or visitor will enter the date of the gift. The default is today's date, but the donor can schedule the gift for a later date.

When satisfied with the entries on this screen, the donor will click the green **Continue** button.



The next screen allows the donor to select the funding source.

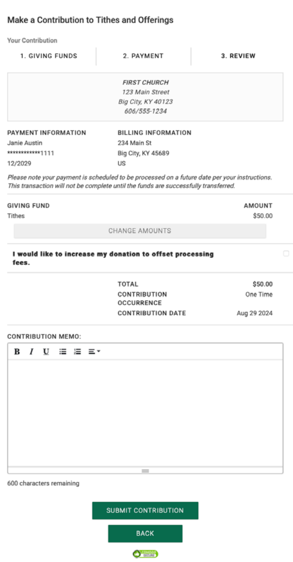
All stored funding sources are available with the most recent account used selected by default.

The donor may select a different funding source by clicking on the dropdown menu and choosing a different payment account.

The donor may add a new funding source by clicking **Create New Payment Method** above the dropdown.

For whichever account is selected, the funding source details are displayed.

When the donor is satisfied with the choice of a funding source, he or she will click or tap **Continue**.



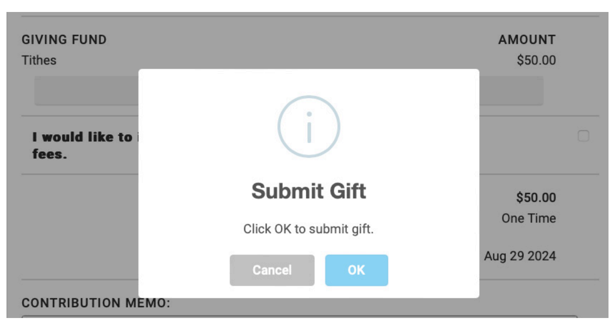
Next, the donor is presented with a New Gift confirmation screen containing the information entered: payment information and the details of the gift.

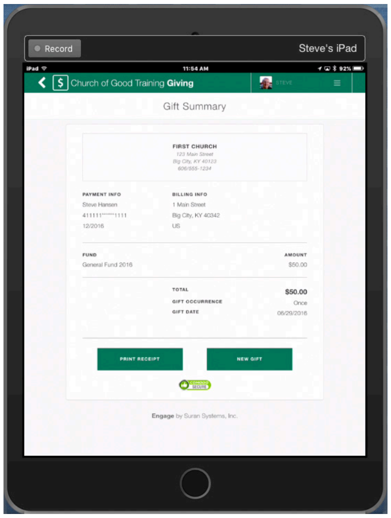
If FEE ASSIST is enabled, the donor check the box on the line reading - I would like to increase my donation to offset processing fees" appears. If the donor has set this as their default, CDM+ Engage will calculate and display the added fees. If they have not set as their default, they can still elect to check this at this time.

A gift memo box is offered to make any special notation for this gift.

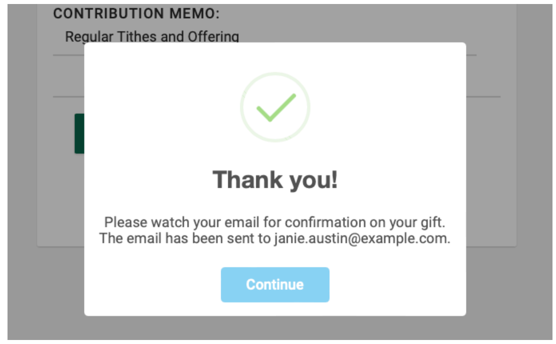
The donor may click or tap the **Back** button to make changes, or the **Submit Contribution** button to proceed.

A final Submit Gift confirmation screen appears. The donor will click the Cancel button to exit or the OK button to proceed. Once the donor clicks the OK button, the gift is being processed. While it processes, three dots appear and move, indicating the process is working.

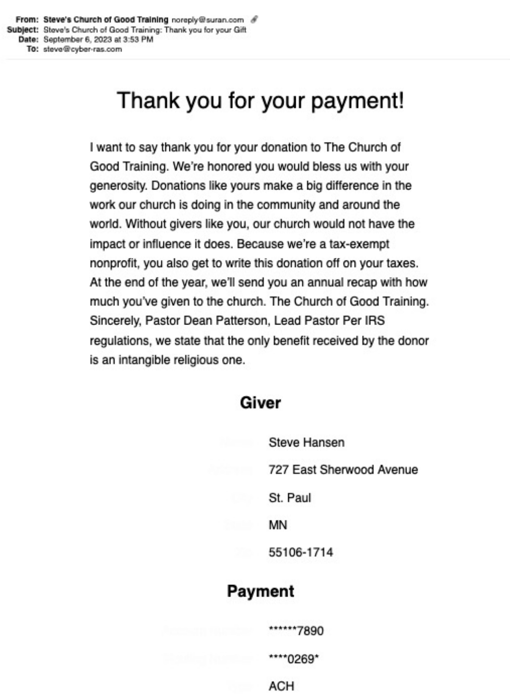


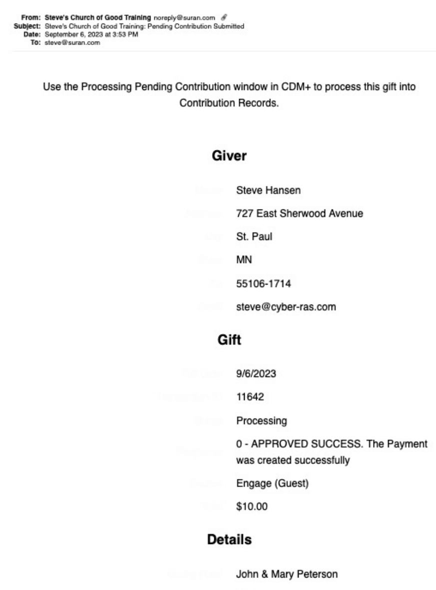


Once the gift has completed processing, the **Thank you** window appears. Clicking **Continue** displays a gift summary window, again providing the details of the gift and offering a **Print Receipt** button at the bottom.



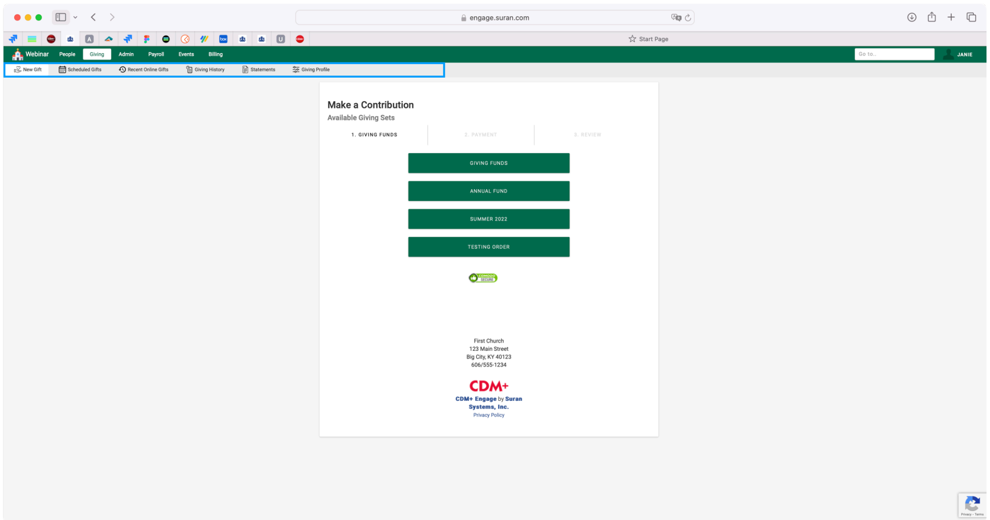
Regardless of which giving method is used, two emails are sent immediately. One, a standard receipt, is emailed to the donor at the email address used or linked to the account. The second email is sent to a staff email address, advising that an online gift has been received or a recurring gift has been established.



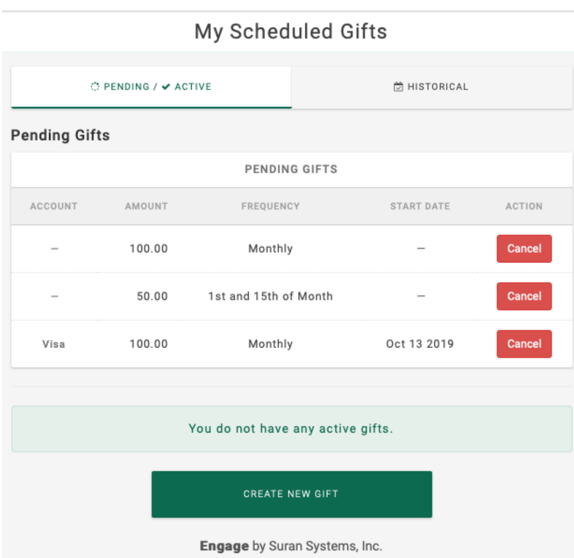


Other Options Available in Engage Giving When Logged In

When logged in, clicking **Giving** from the top navigation menu displays several additional options. Make a gift – see prior pages.



Scheduled Gifts – shows two tabs: Pending/Active and Historical

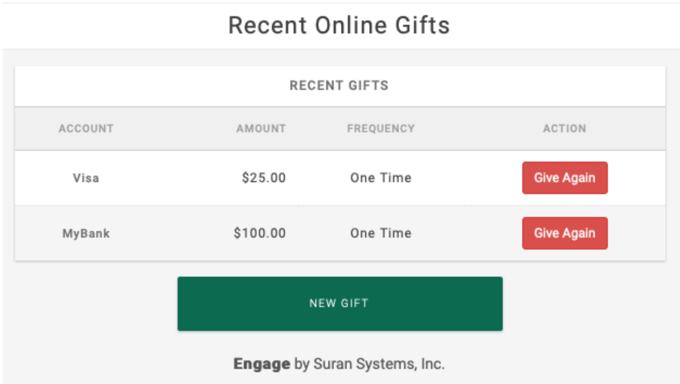


Pending Gifts are those that have been created but not yet processed.

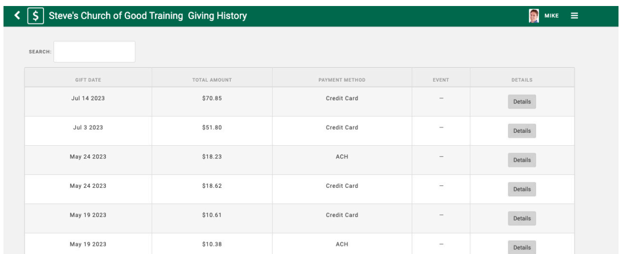
Active Gifts are those that have been created and processed at least once and which are scheduled to process again.

Historical Gifts are those that have been processed and will not process again.

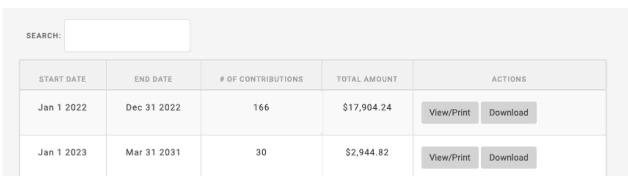
> Example 1: a one-time gift given last week is historical
>
> Example 2: a one-time gift given today would be pending
>
> Example 3: a recurring gift scheduled as monthly for 6 months will show as Active during those 6 months, but as historical after the 6 months.



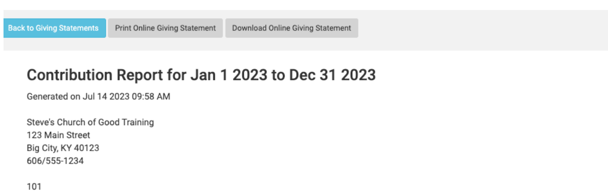
Recent Online Gifts displays the last several gifts that have been made with an option to Give Again. If **Give Again** is selected, the gift confirmation window opens for the donor to confirm the gift.



Giving History – displays a history of the member's giving, both in-person and online.

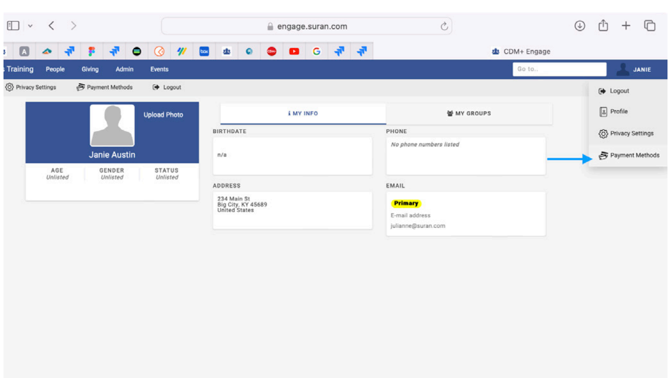


Statements - when the organization produces a batch of online giving statements, the donor may view theirs here. The donor may simply view the statement, print the statement or download a pdf version.



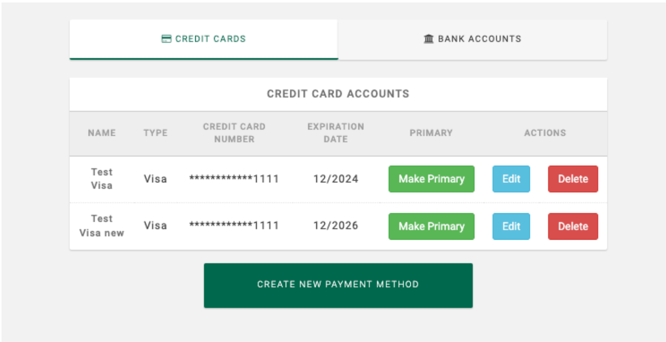
Multiple batches may be shown – 1st quarter, 2nd quarter, Year-end 2022, Year-end 2023, and so on.

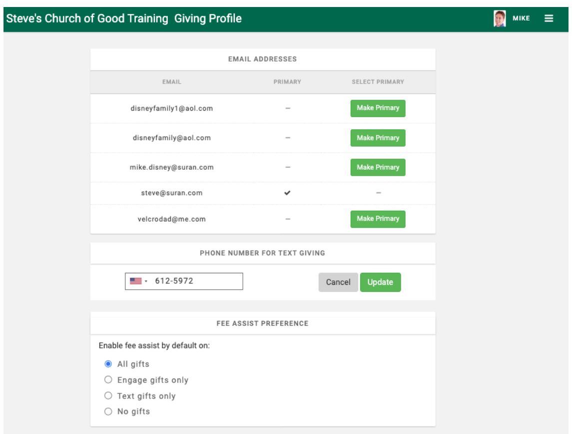
Pledge information will NOT be displayed on Online Statements.



Payment Methods – displays existing funding accounts, credit/debit cards, and bank accounts. The member may add new accounts or delete existing. You can navigate to Accounts by clicking your profile name and then clicking Payment Methods.

One account, either credit/debit or bank account, should be set as the Primary account. The donor may add new accounts or edit/delete existing.



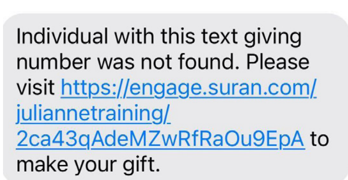


Profile – select the email address where gift confirmation should be sent, enter or edit your text giving phone number, and set the Fee Assist preference..

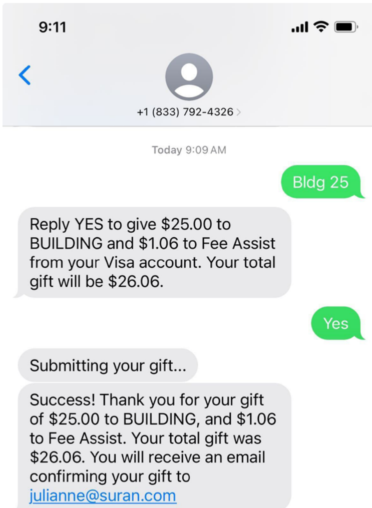
Using Engage Text Giving

When an Engage giver wants to make a text gift, they will send a text message to your SMS Giving Number in the format [command] [amount]. So, for example, if the Text Giving command for the Building Fund is BUILD and a giver wants to make a $100 gift to the Building Fund, they text 'BUILD 100' to your SMS Giving Number.

The first time someone uses text giving, Engage needs to connect their mobile number to their Engage account. So for the first text gift, Engage will respond with a link for the user to log into their Engage account.



Once the giver has logged into their Engage account, Engage associates the mobile number with the Engage account so that subsequent gifts from the same mobile number are credited to the giver with that Engage account. Engage will reply to subsequent gifts with a confirmation message.



A split donation to multiple giving funds is also available with Engage Text Giving. Simply enter a series of command-amount, command-amount and Engage Text Giving will interpret and display the following screen.

Online Payment Processing

Electronic Banking

Suran Systems, Inc. has partnered with a merchant account processor, Paragon, to allow CDM+ users to accept debit and credit card (VISA, MasterCard, American Express and Discover) payments and ACH transactions via bank drafts. These electronic transactions are initiated through CDM+ Engage, CDM+ Web Ministry Tools, or Process Treasurer Reports (for COG Regional clients).

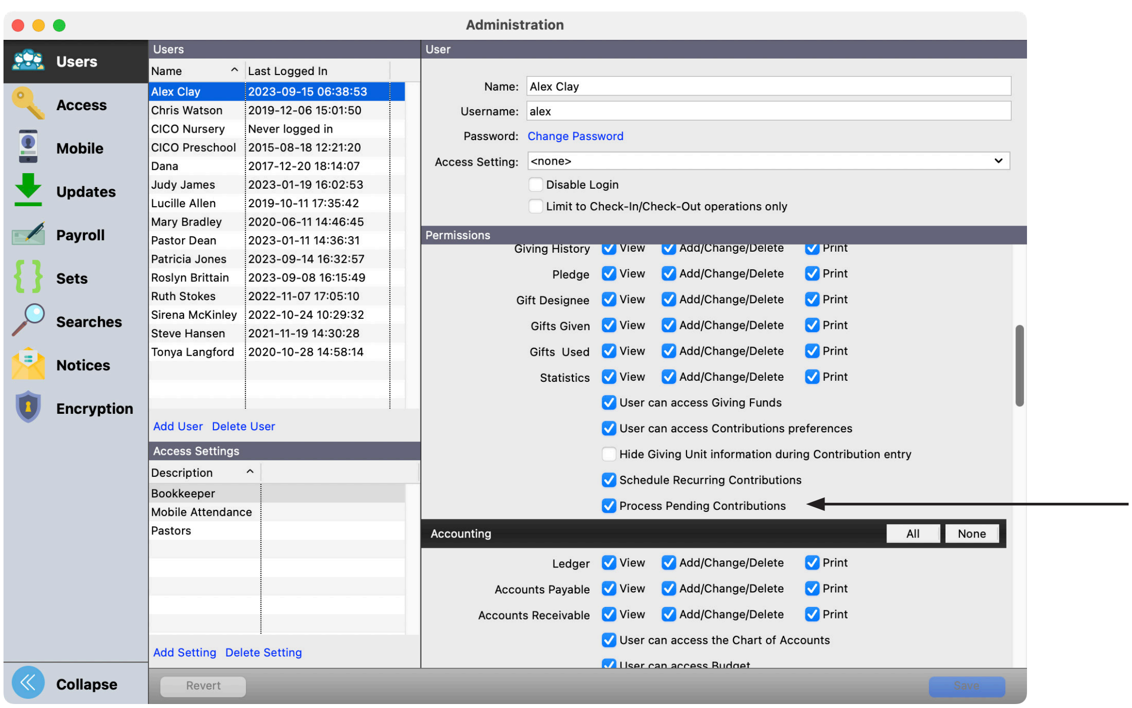
A merchant account is required for electronic banking in CDM+. There is no additional cost for a merchant account, though per-transaction fees apply. A subscription to a CDM+ SAAS or Cloud plan is required. For more information about merchant accounts, contact the CDM+ Sales Department at 877-891-4236 or sales@cdmplus.com.

CDM+ provides full integration of electronic banking from detailed transactions, such as online contributions and registrations, made through CDM+ to deposit processing of revenue and expenditures of fees. This integration reduces errors and minimizes the amount of bookkeeping required to handle electronic transactions.

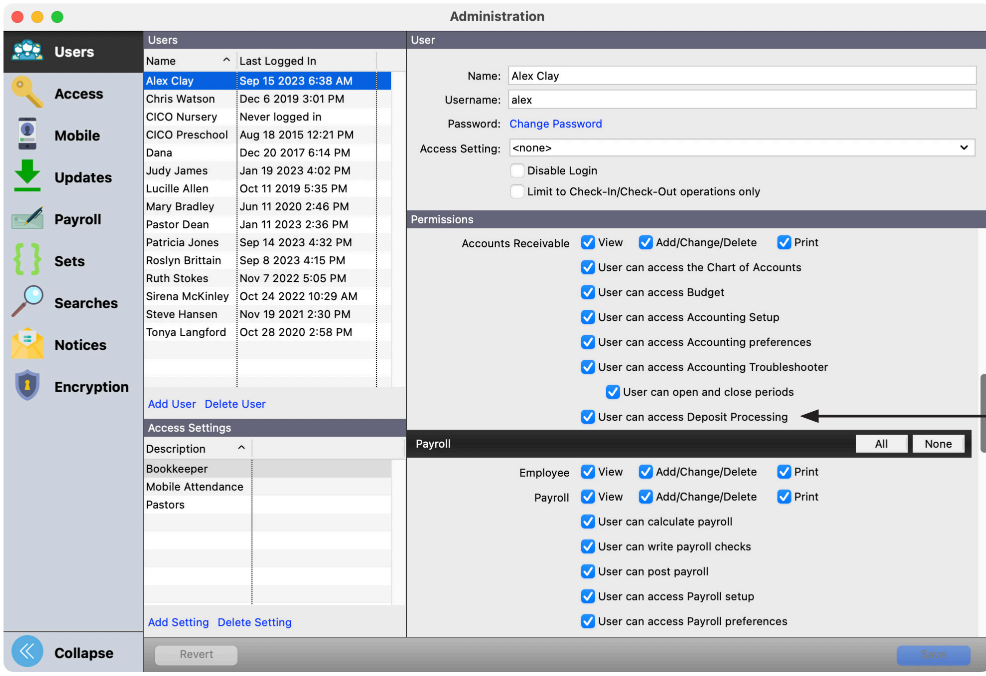
User Access

▶File ▶Administration ▶Users

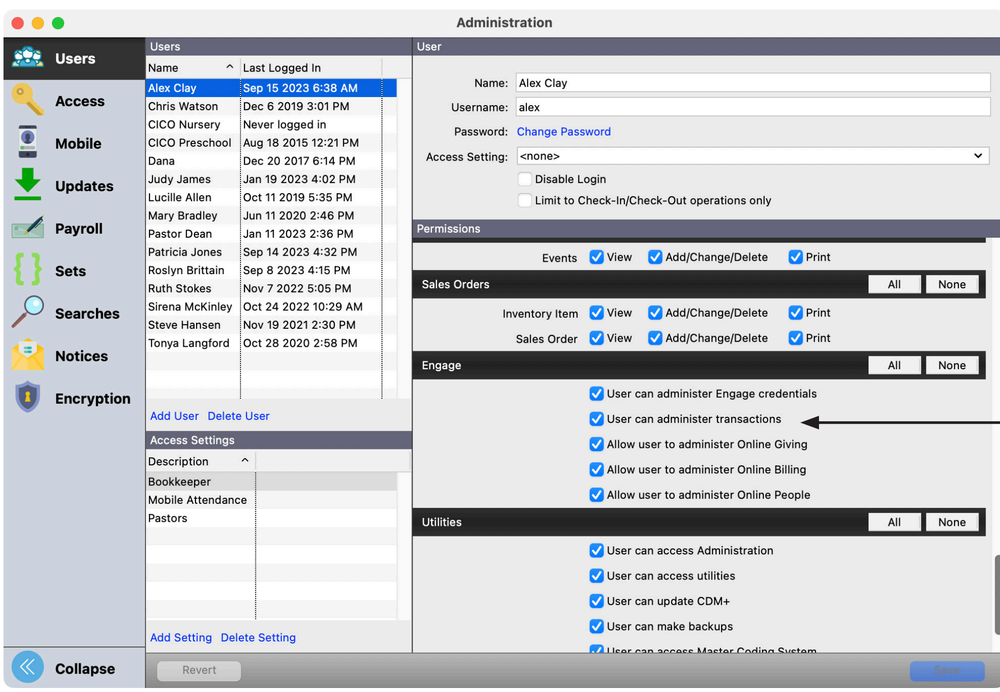
To allow a person to access the Process Pending Contributions window, you must check the box next to Process Pending Contributions under Contributions. Note: scroll down on the window to view all user access settings.



Under the Accounting on the Users pane of the Administration window, there is a Deposit Processing checkbox to control who can perform this function.



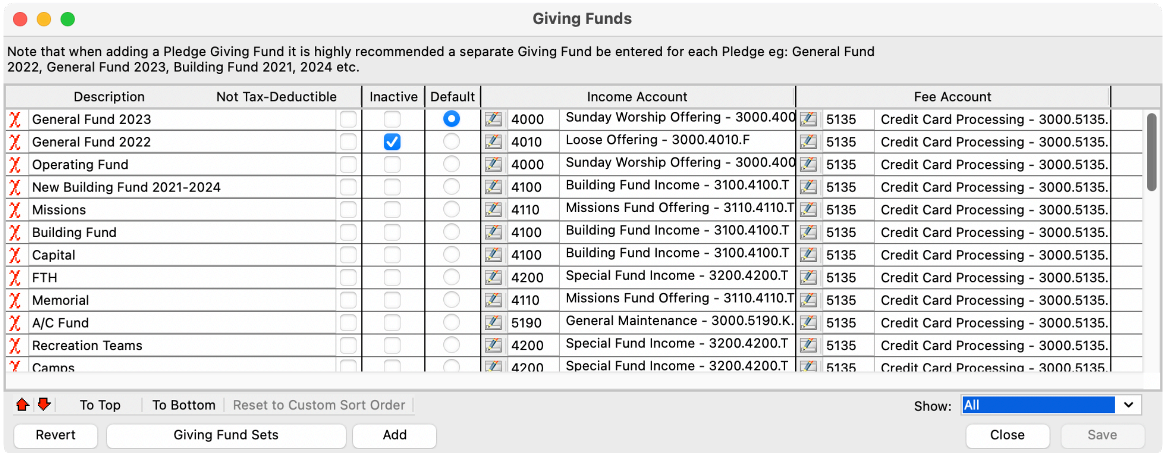
Under the Engage section there is a permission to administer transactions.



Setting Up Accounts for Income and Fees

Engage Giving

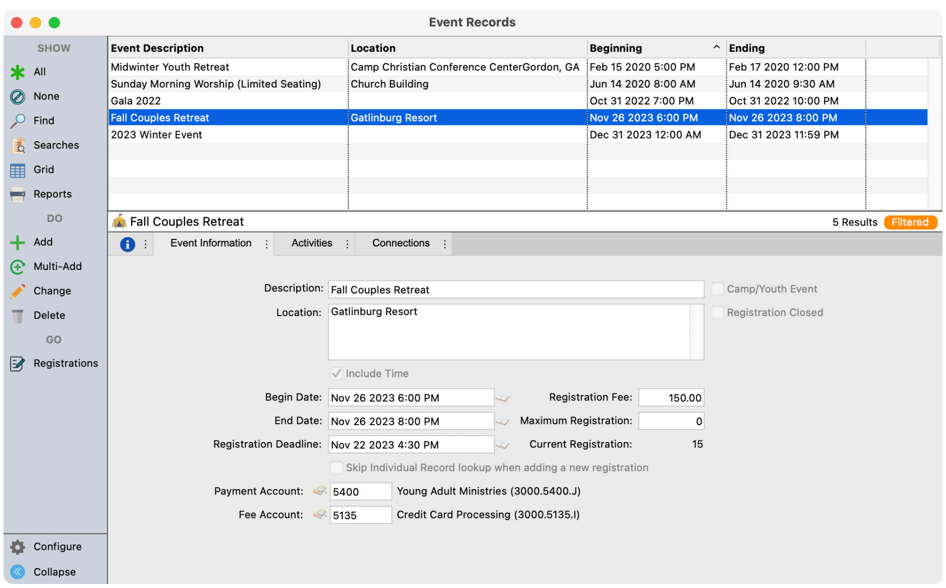
▶Program ▶Contributions ▶Giving Funds



The account number where you want the merchant fees to be charged against is entered on this window. This should be an expense account to reflect the per-transaction cost to transmit funds electronically between two parties.

Single Event Registration Tool

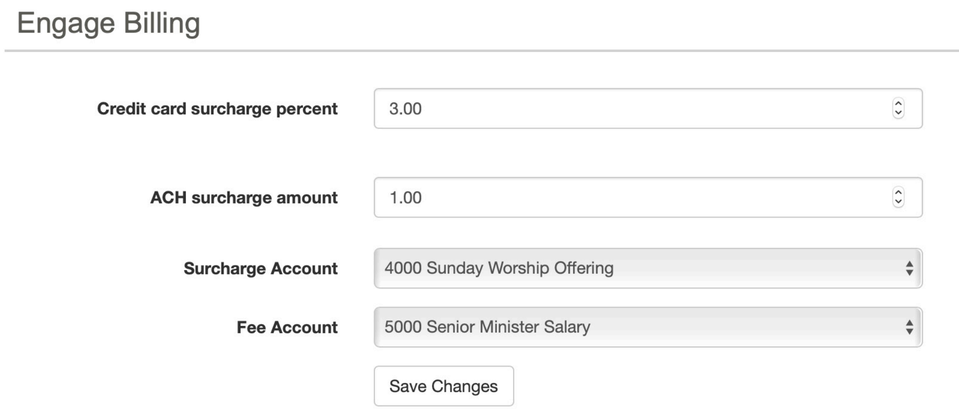
▶Program ▶Event Registration ▶Event Records



Enter the account number where you want the merchant fees to be charged on the Event Record. This should be an expense account to reflect the per-transaction cost to transmit funds electronically between two parties.

Engage Billing

▶Program ▶Engage ▶Settings ▶Billing



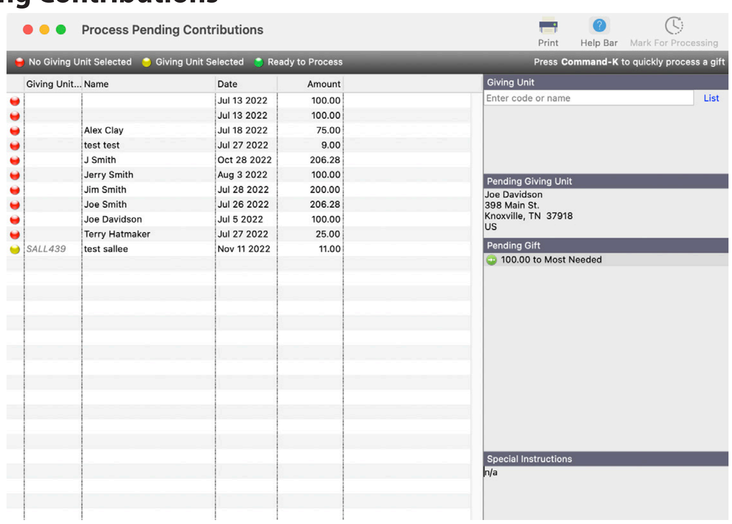
Select the fee account where merchant fees will be debited. If using a processing fee, select the income account to receive those funds.

Process Pending Contributions

▶Program ▶Contributions ▶Process Pending Contributions

The Process Pending Contributions window displays all one-time gift online contributions that have not been processed. If a user has logged into their Engage account and made a gift through Engage Giving, their gift will not show up in the Process Pending Contribution queue; those gifts are credited directly to the giver's Giving Unit Record. There are three status options for processing gifts:

1) No Giving Unit Selected (red dot)
2) Giving Unit Selected (yellow dot)
3) Ready to Process (green dot)

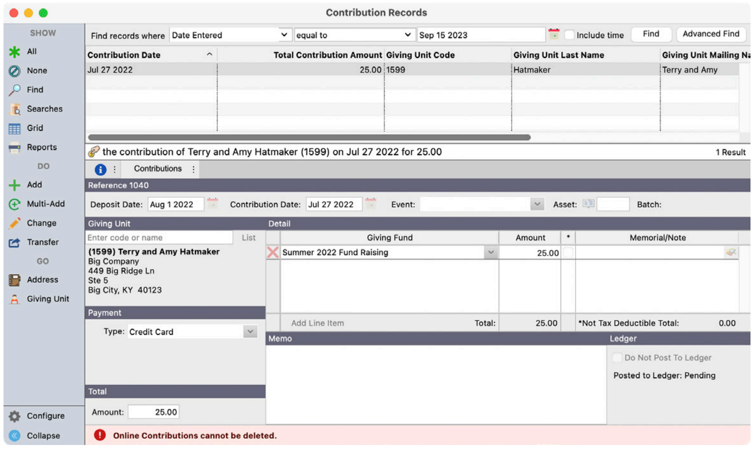


Initially, all gifts will either be the first or second option. CDM+ will attempt to match an incoming gift to an existing Giving Unit record in CDM+. If it can, that gift will have a yellow dot. If it cannot, the gift will have a red dot.

When you select a gift that CDM+ cannot easily identify the source (red dot), you can either select a Giving Unit or create a new one. Selecting an existing Giving Unit is the same as in Contributions Entry: either type in part of the name or click on the List button. Once the gift is tied to a Giving Unit, it will be marked with a yellow dot.

CDM+ displays the Pending Giver (which is the information entered by the giver online), the pending gift(s) designation, and any special instructions that were entered online on the right side of this window.

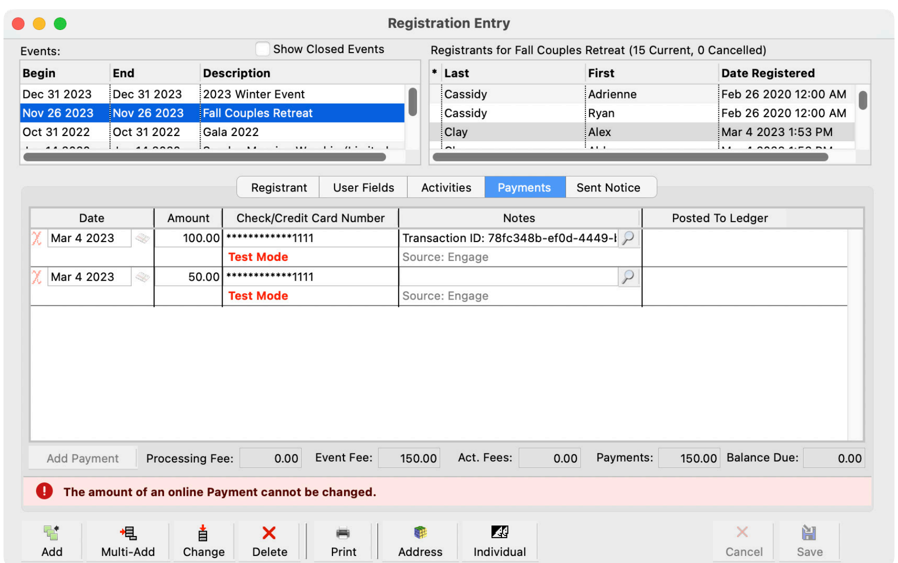
Only those gifts that you have marked as Ready for Processing (green dot) will be processed when you click the Save button. To Mark for Processing, highlight a gift and either press Cmd-K (Mac) or Ctrl-K (Windows) on the keyboard or click the Mark for Processing button on the top of the window.



When gift is Marked for Processing and saved, the contribution becomes part of the giver's giving record. All gifts processed from this window can be viewed from the Contribution Records Window.

When the Contribution record is initially created, the Deposit date and Asset information is blank. This will automatically be supplied when the funds settle into your bank account and the Deposit Processing functions are completed. CDM+ has marked the source of this contribution as Engage. Users can generate any standard Contribution report using this source. This allows for easy understanding of the giving patterns and source of online contributions.

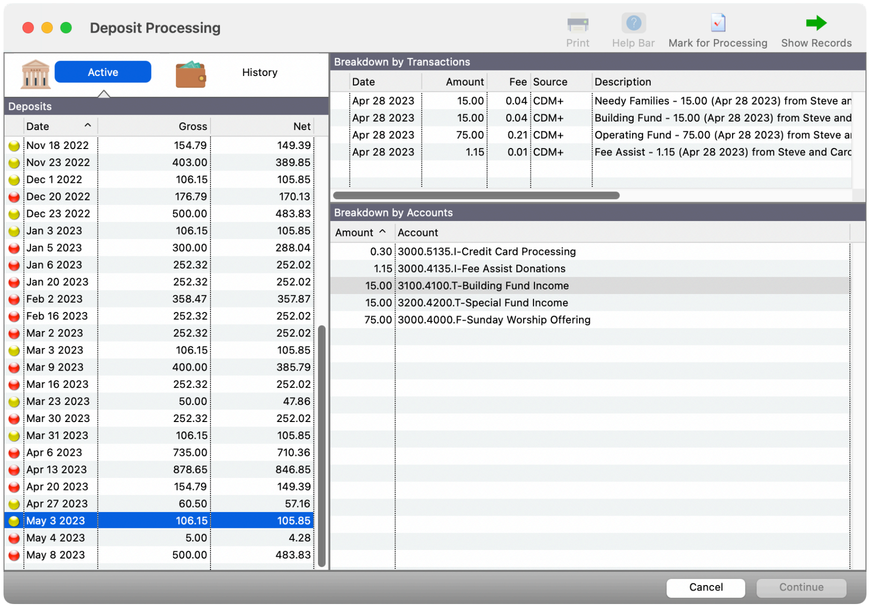
Event Registration Payments



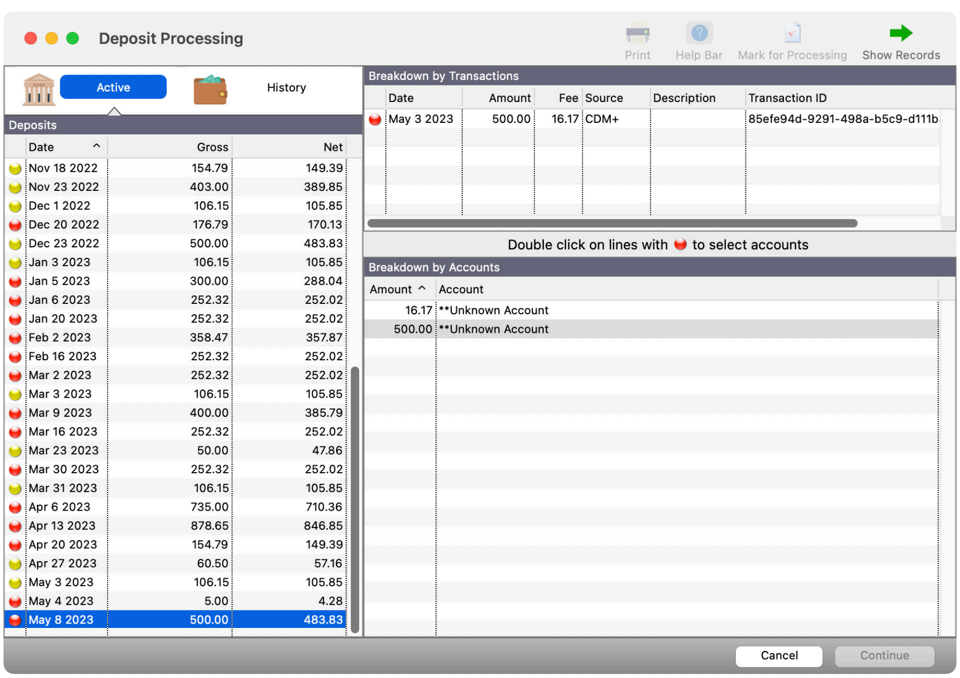
Payments for events made online automatically show up on the Payments tab. CDM+ stores the transaction ID from the payment processor with the payment. The source will read Engage. Credit card numbers will only show the last four digits of the card used.

Deposit Processing

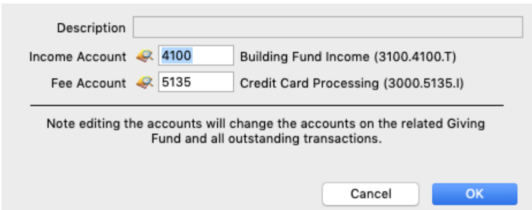
▶Program ▶Ledger ▶Deposit Processing

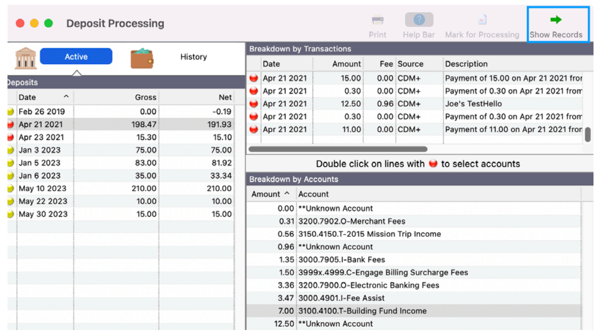


All deposits made to your bank account are listed on the left side of the window. When you select a deposit, the top list on the right displays the actual online transactions that make up that deposit. These may be from different days and be a mix of contributions, online registrations, or one-time payments, etc. The lower list on the right displays the account number breakdown including fees. A deposit marked yellow simply needs to be reviewed and then marked for processing by pressing cmd-k (Mac) ctrl-K (Windows). Deposits in red indicate missing account numbers. Missing account numbers can be from the income or fee side of the setup.



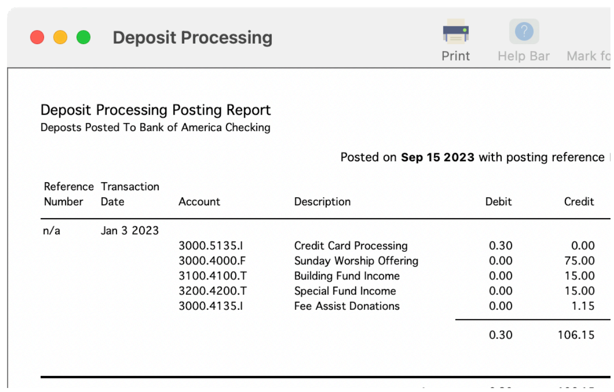
Missing account numbers can be corrected on this window. Click on a line with a red dot on the list on the left. Transactions with missing account numbers will show on the right side in Red. By double-clicking on the red dotted lines, you can supply the appropriate account numbers. CDM+ will also then correct the setup windows related to these transactions and any others that make up this deposit.





You can view the Contributions, Registrations, and so on for the selected deposit by clicking **Show Records.** This will open windows in CDM+ showing the various records for that deposits.

When all deposits have been Marked for Processing, click Continue to post these transactions to your Ledger. A preliminary Deposit Processing Posting Report will be generated to the screen with a **Post** button active. Click **Post** to continue.



After posting you can jump to the created ledger entries or return to process more deposits.

If you have been manually entering deposits and are migrating to using Deposit Processing, you may have desposits in this window you don't want to post to the ledger. Instead, you can mark the deposits as processed by following these steps:

1. Go to File -> Utilities

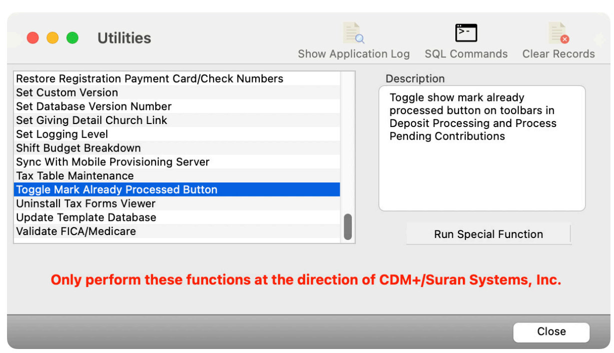
2. Select the Toggle Mark Already Processed Button special function

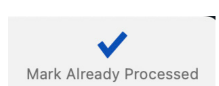
3. Click Run Special Function

4. Re-open Deposit Processing

5. Select one or more deposits you do not want to post

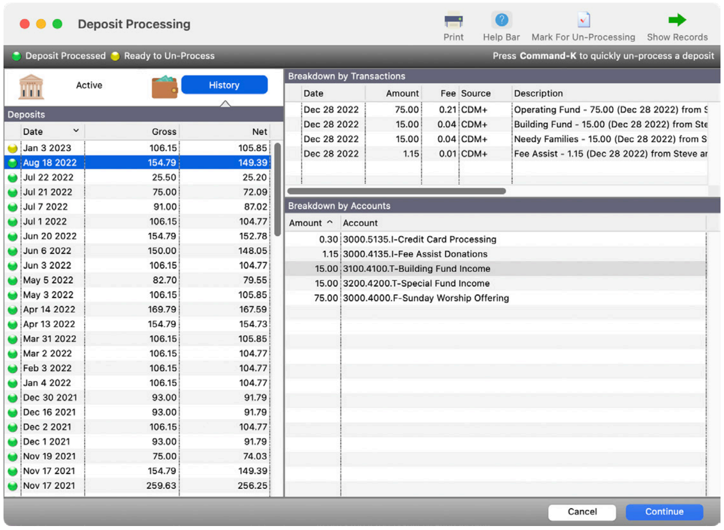
6. Click Mark Already Processed





You can use this same technique to clear items from the Process Pending Contributions window without creating a Contribution Record.

Working with Processed Deposits

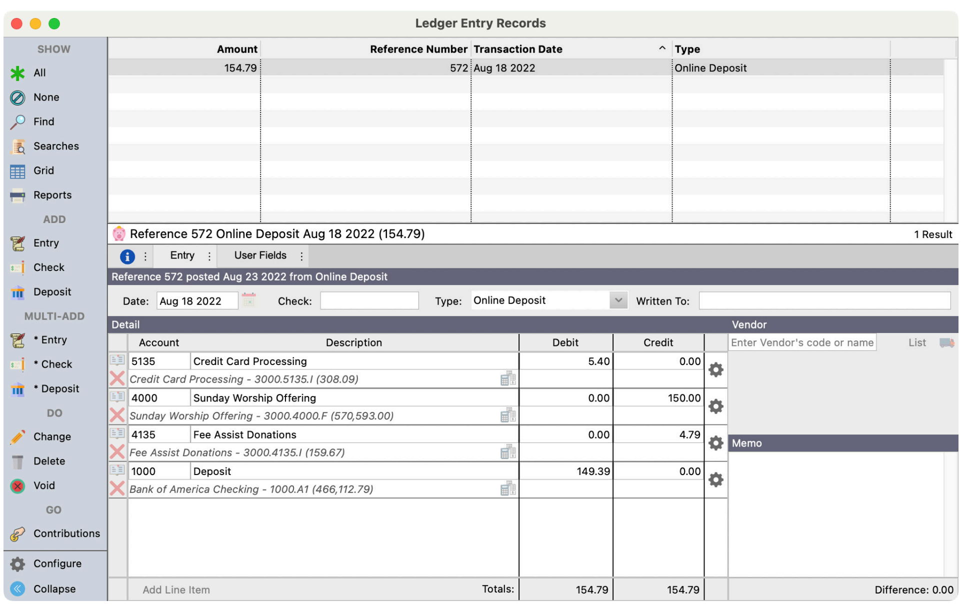


You can click the **History** tab to see a list of deposits you've previously posted. Select a deposit to see its details, and click **Print** to re-print the posting report. You can also jump to the records connected to this deposit by clicking **Show Records**. Double-click a deposit to open it Ledger Records.

If you need to re-post a deposit for any reason, you can select a deposits and click **Mark for Un-Processing**. Once you continue, the original ledger entry for the deposit will be voided and the deposit will return to the Active tab to be re-posted.

▶Program ▶Ledger ▶Ledger Entry Records

Go to the Ledger Entries window to view processed deposits. The type of all deposit processing will be listed as Online Deposit.

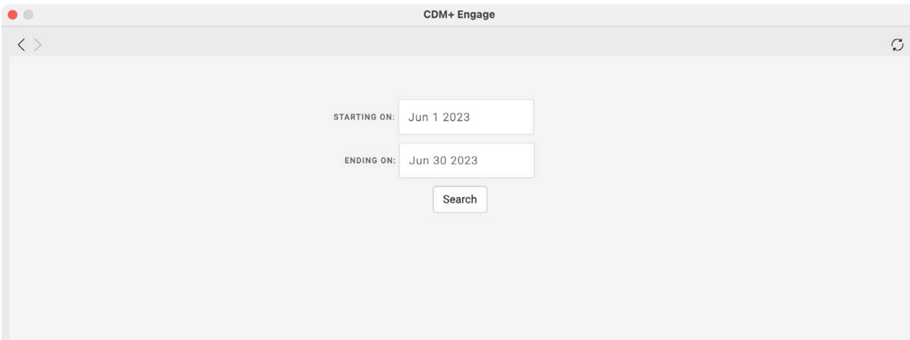


Payment Administration

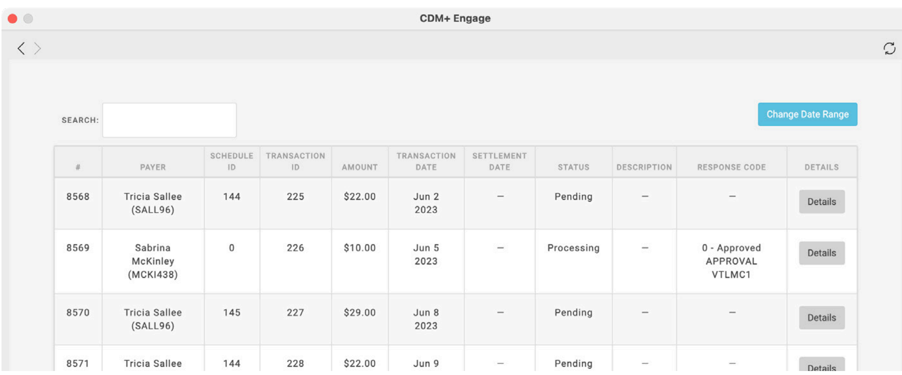
▶Program ▶CDM+ Engage ▶Search Transactions

Use the Search Transactions window to locate transactions, view their status, create receipts, and refund transactions. You can access this feature through CDM+ Desktop or by logging into CDM+ Engage.

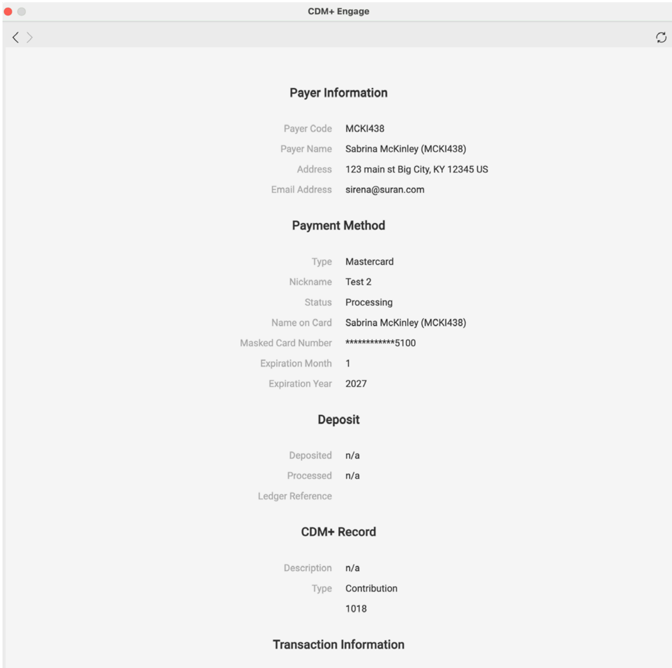
Search Transaction Records



Enter a date range, and click **Search**.



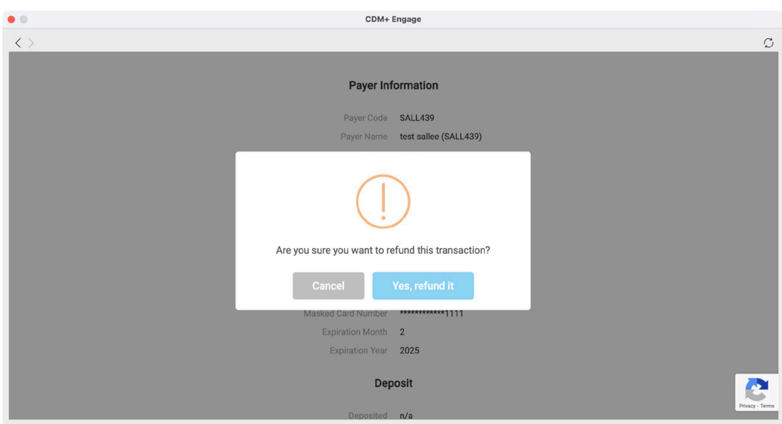
You can use the dynamic search field to search for a specific transaction. For example, you can search by name, amount, date, status, etc. Click the column headers to sort the results by the column. Click **Details** to view more information about a transaction.



Transaction details will show information about the payer, payment method, deposit (if funds are settled), the CDM+ record, and the transaction. You can print a receipt by clicking **Print Receipt**, though it may be better to generate a receipt specific to the CDM+ record, such as a Contribution Statement.

Refunding a Transaction

If the transaction detail shows YES next to Is Refundable, you can issue a refund, such as for a duplicate charge made in error, by clicking the **Refund Transaction** button.



Click the **Close** button. Note the status of the charge now shows as Refunded on list of transactions.

If the charge is not refundable, the Refund Transaction button will not appear. Transactions may not be refundable after a period of time or if they were made with a merchant account that's not the active merchant.

Transaction Custom Listing and Export

Reports ▶ CDM+ Engage ▶ Listings and Exports ▶ Transaction Custom Listing and Export

This report shows the same information as Search Transactions though the powerful custom listing and export engine. You can generate reports for transactions made or deposited within a given date range, through various sources, and in specific statuses.

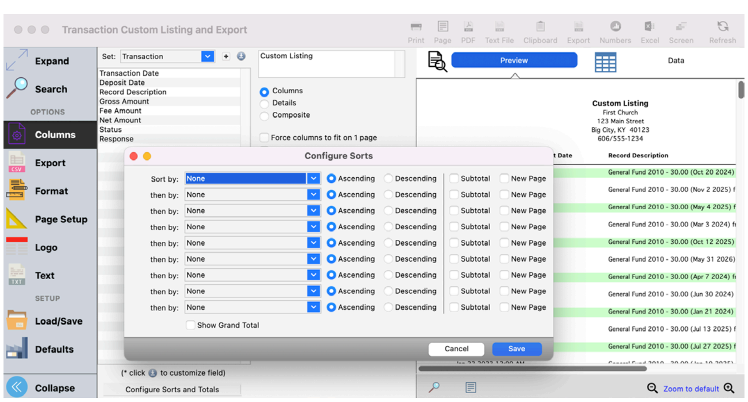
Statuses include:

- **Cleared:** Funds for the transaction have been successfully captured from the payer
- **Failed:** The transaction failed to capture funds
- **Incomplete:** A system failure prevented the transaction from being created with the payment processor
- **Pending:** This is a pre-created transaction that is awaiting transaction details from the processor (rare)
- **Processing:** The transaction has been initiated but funds have not been captured
- **Refunded:** Funds were captured, then returned to the payer
- **Returned:** Funds were captured but then returned because of payment issues (usually ACH and relating to insufficient funds or a closed/invalid account)
- **Scheduled:** The transaction is scheduled to be created at a later date (rare)

You can add a variety of columns to the report. Notable columns are:

- **Account Holder:** The entity holding the payment method (card, ACH bank account)
- **Payment Method:** The account used to pay for the transaction (card, ACH bank account)
- **Gross Amount:** Amount paid by the payer
- **Fee Amount:** Transaction Fees
- **Net Amount:** Amount received by you, the merchant
- **Record Description:** Information about the connected CDM+ record (contribution, registration payment, etc.)
- **Schedule:** Use for recurring payments
- **Account Holder ID, Deposit ID, Payment Method ID, Schedule ID, Transaction ID:** Internal identifiers for various records relating to the transaction; often used for troubleshooting

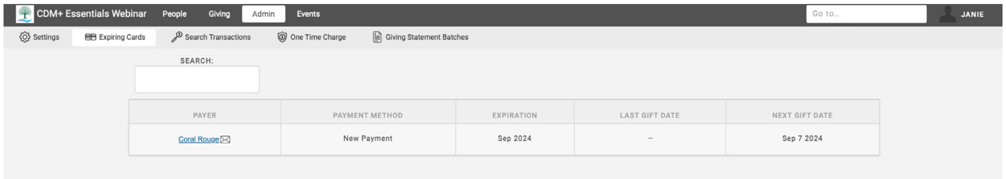
Refer to the Fundamentals of CDM+ class for help with how to use a Custom Listing and Export report. For example, here is a report subtotaling by status to show transactions over a date range.



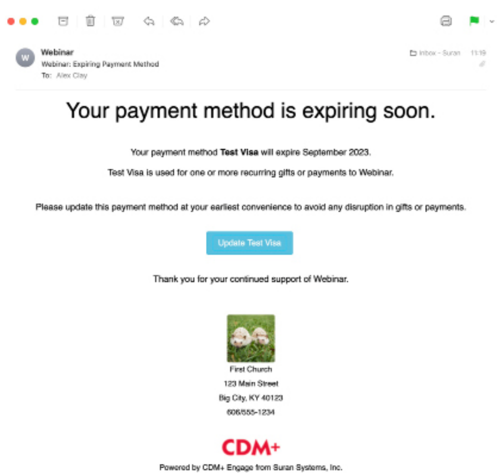
Expiring Cards

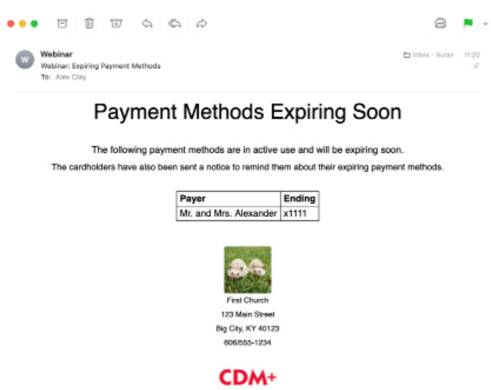
CDM+ Engage ▶ Admin ▶ Expiring Cards

You can view a list of cards with active, recurring payments that will expire in the next month.



CDM+ will also notify both the account holder and staff on the 1st and 15th of the month of expiration to encourage the account holder to update their payment method and to allow follow-up.





One Time Charge

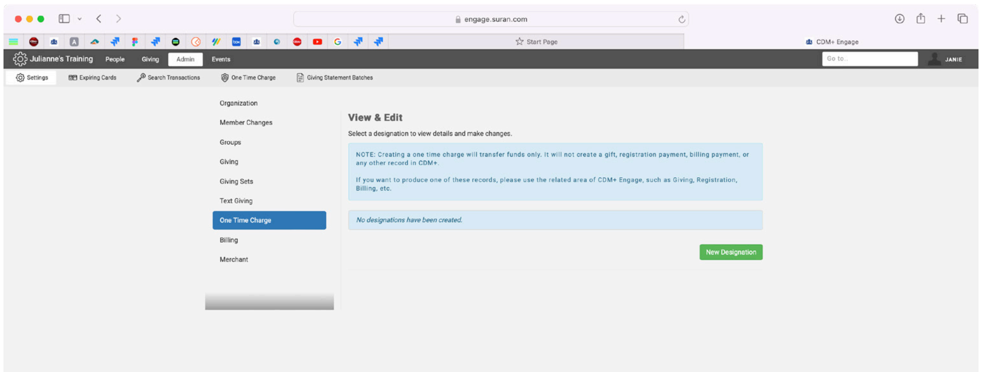
A One Time Charge can be used to make payments that do not link to a gift, registration, customer account, etc. These payments are purely financial and do not create additional records in CDM+.

NOTE: If you need to make a gift, registration payment, or Accounts Receivable payment use the related area of Engage, such as Giving, Registration, Billing, etc.

Accessing One Time Charge

1. Go to **Program ▶CDM+ Engage ▶Setting**

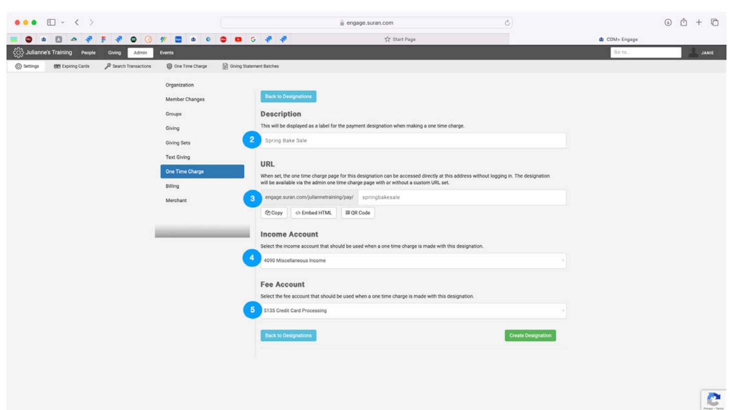
2. Go to the side bar menu and choose **One Time Charge**



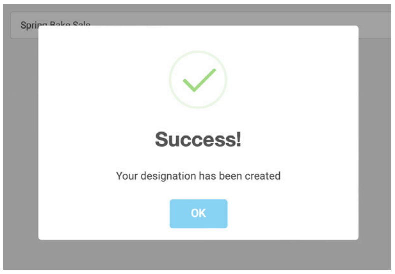
Create a Designation

A Designation is the term given to the specific transaction names that you can select from to label where One Time Charges are being taken from. For example, you may want a Designation for T-shirts for VBS, or media resources for members, or an annual bake sale.

1. Click New Designation
2. Enter a Name to identify the designation
3. Enter a descriptive name in the URL field making sure it does not include any spaces (e.g. 2022-spring-bake-sale).
4. Select the Income Account, which specifies where the deposit will post against
5. Select the Fee Account which is used for transaction fees for the payment
6. Click Save Changes

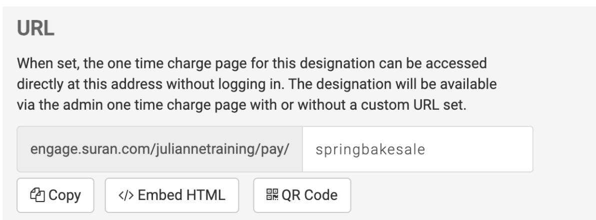


A pop-up will appear on the screen. Click OK.



Giving Access

To begin entering charges, or to share it with someone else, copy the URL and paste into a web browser. You can also download a QR code to include on your website or event materials.



Card Swiping

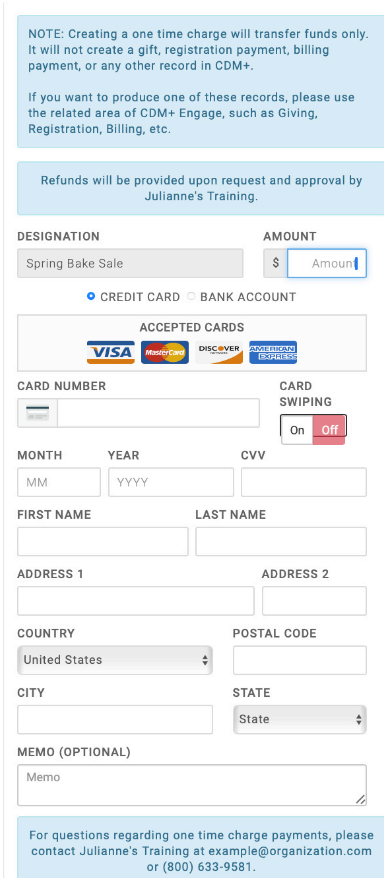
NOTE: This is not secure card swiping designed to be run with a mobile device or stand-alone kiosk. The swiper simply enters card data in lieu of manually typing it in. Card swiping has the same security and functionality and typing in card information using the keyboard and should be used in a staffed environment.

Any card swiper that offers keyboard emulation should work to accept a swipe. The following devices have been tested and processed swipes correctly:

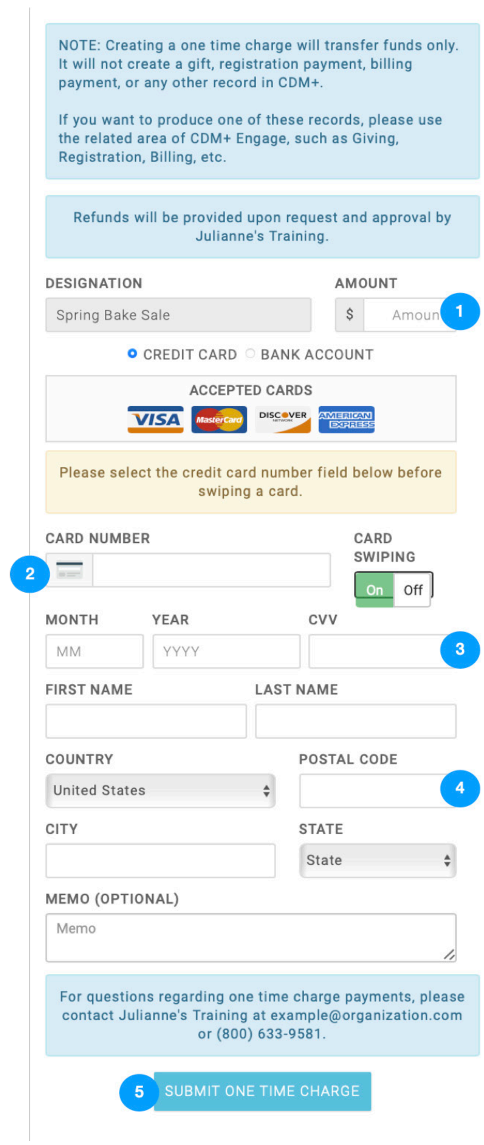
- MSR90 USB Swipe Magnetic Credit Card Reader 3 Tracks Mini Smart Card Reader MSR605 MSR606 Deftun
- MagTek 21073062 Dynamag Magnesafe Triple Track Magnetic Stripe Swipe Reader with 6' USB Interface Cable, 5V, Black

Entering a One Time Charge

Using the Designation's URL or QR code will take you to the One Time Charge window.

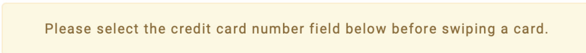


1. Enter the Amount and tab to go to the Credit Card Number field.
2. If using a card swiper, once in the card number field, you'll see the Card Swiping toggled to On (bold "on) once you swipe the card. If you swipe the credit card, the credit card number, the card holders name and the expiration date of the card will automatically be populated. Then, the cursor will move to the CVV field. If you're not using a card swiper, simply enter in the card number..
3. Enter the CVV from the back of the card
4. Enter the postal code. It automatically fills in the city and state.
5. Click Submit One Time Charge

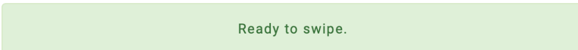


Card Swiper Status

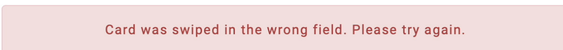
If the Card Swiper is turned On, you will see a yellow banner.



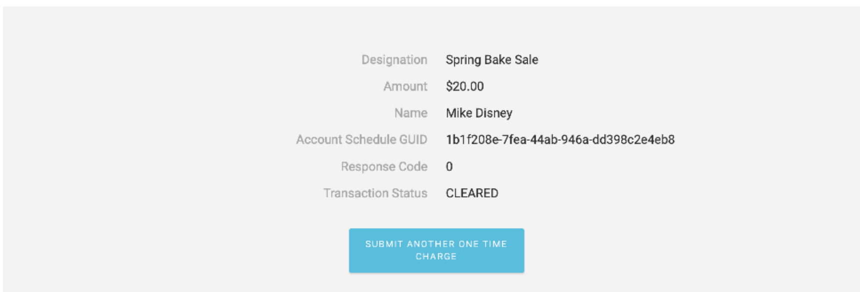
When you put your cursor in the Card Number field, the banner will turn green.



If you swipe a card while your cursor is in a different field other than the Card Number field then the banner will turn red.



A confirmation page will appear. Click Submit Another One Time Charge to return to the first screen so you can make another one-time card charge.



Administrator Functions

If you are an administrator, you can access One Time Charge directly, and do not need a URL or QR Code. You also do not need a designation to perform a one-time charge.

Log into Engage as an administrator. Under the navigation menu, click **One Time Charge** under Admin.

The One Time Charge window will open, but instead of having a pre-selected Designation, you as the administrator have the ability to select which Designation you want, and can switch between them as needed. Every time you finish entering a One Time Charge, you will return to this window, with no pre-selected Designation. This is especially helpful if you have two events going on at the same time.

NOTE: If you enter a One Time Charge as (No designation selected), income and fee accounts will need to be selected in Deposit Processing.