

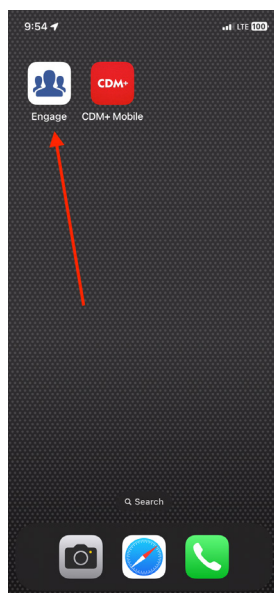
Engage Giving & Online Payment Processing

CDM+ Engage Giving

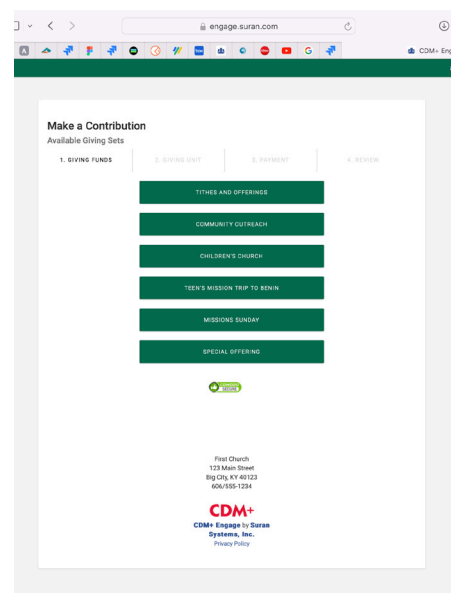
Suran Systems provides online giving through Engage Giving. In the first part of this class, we will cover the setup, administration, and use of Engage Giving.

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.

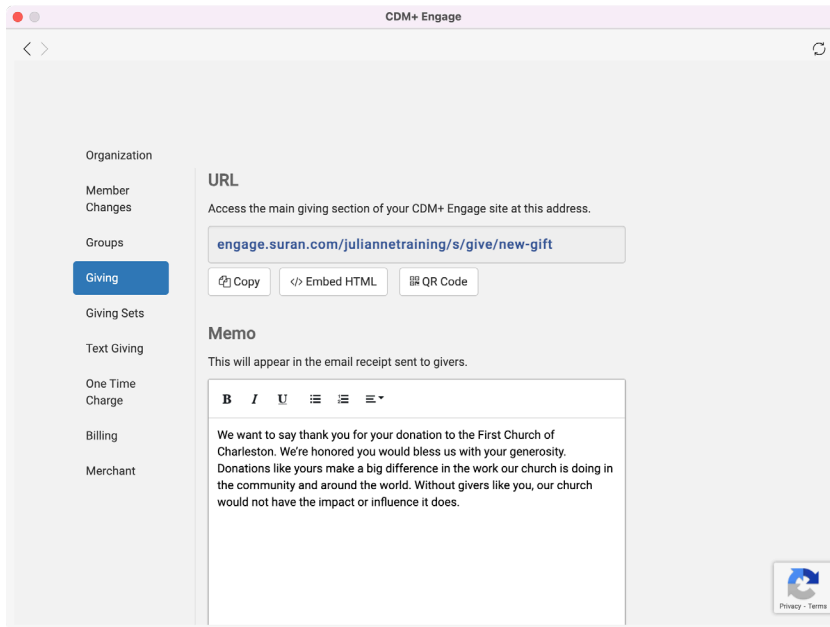
Engage Giving gives members or visitors the ability to create an account or log into their existing account, make a one-time immediate gift, set up a recurring gift schedule, maintain their payment sources, review any existing recurring setups, to view a gift history, print a giving statement all from 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.



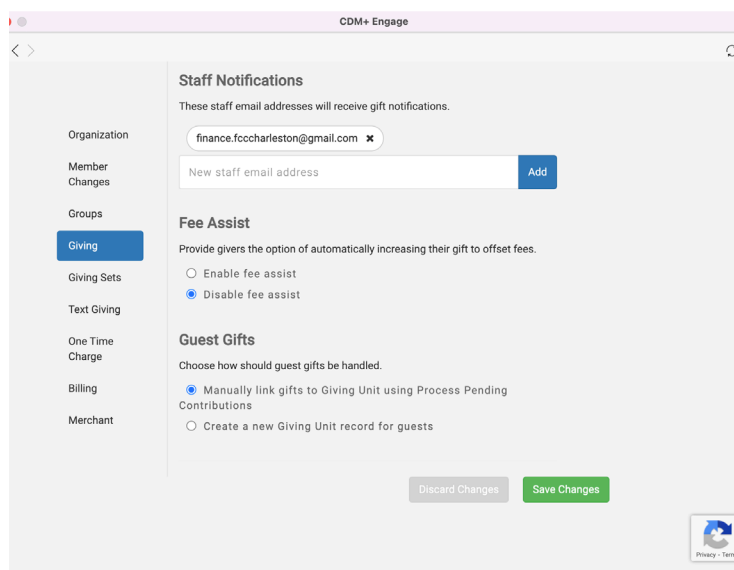
URL - The Giving URL is an extension of the Engage URL created as part of setting up Engage. This address can be used as the link for a **Donate Now** button on your website. It can also be converted to a **QR code** that someone can scan from a flyer, bulletin, or pew card. Use the following buttons:

- **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.

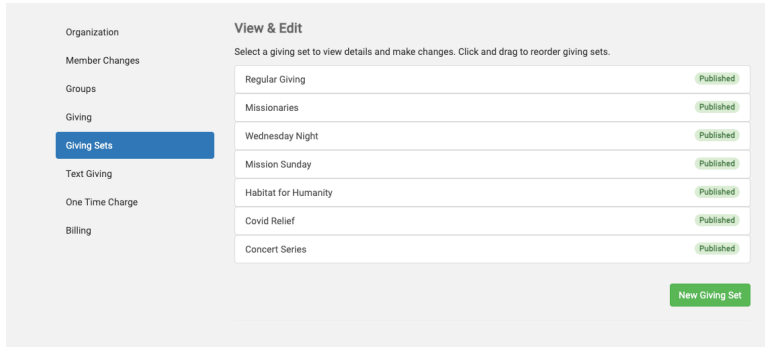
- Manually link gifts to Giving Units using CDM+ Desktop **Process Pending Contributions** or
- Create a new Giving Unit record for these guests.

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.

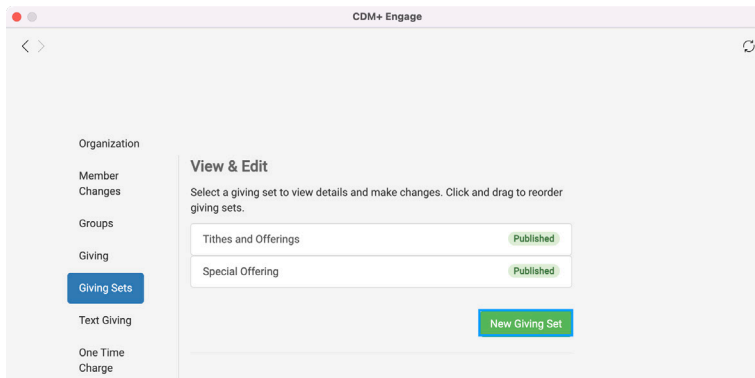
Create Giving Sets and Select Giving Funds



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.

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.

URL

Access the current giving set directly at this address.

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.

Giving Fund Name	Description
<input type="checkbox"/> Grace Connections Non-Profit	Grace Connections
<input type="text" value="Add giving fund..."/>	
<input type="button" value="Add All Giving Funds"/>	<input type="button" value="Remove All Giving Funds"/>

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.

Publish to New Gift Page

Choose whether to publish this giving set to the new gift page.

Publish this giving set to the new gift page

Do not Publish this giving set to the new gift page

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.)

Recurring Gift

Choose whether to allow recurring gifting for this giving set.

Enable recurring gifts

One-time gifts only

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

Allowed Payment Methods

Choose which payment methods are allowed for this giving set.

All

Credit/Debit Card only

Bank Account only


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

Banner Image

Upload an image to be displayed atop the giving set.



[Upload](#)

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.

- Organization
- Member Changes
- Groups
- Giving
- Giving Sets
- Text Giving**
- One Time Charge
- Billing

Number

Members can make a gift by texting to this phone number.

1 (833) 792-4326

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.

Funds

These funds will be eligible to receive donations through text giving.

	Fund Name	Description	Command (letters only, no spaces)
<input checked="" type="checkbox"/>	Promise 2023	Promise 2023	GEN
<input checked="" type="checkbox"/>	Lift High the Cross	Building	BLDG
<input checked="" type="checkbox"/>	Missions	Missions	MISSION

Add fund...

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

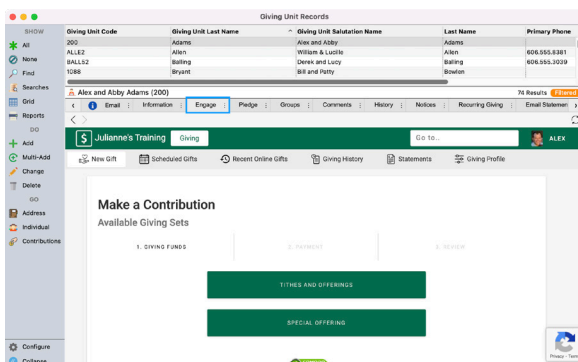
Administrators can work with member/donor Engage Giving accounts within CDM+ itself. This allows staff to:

- 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

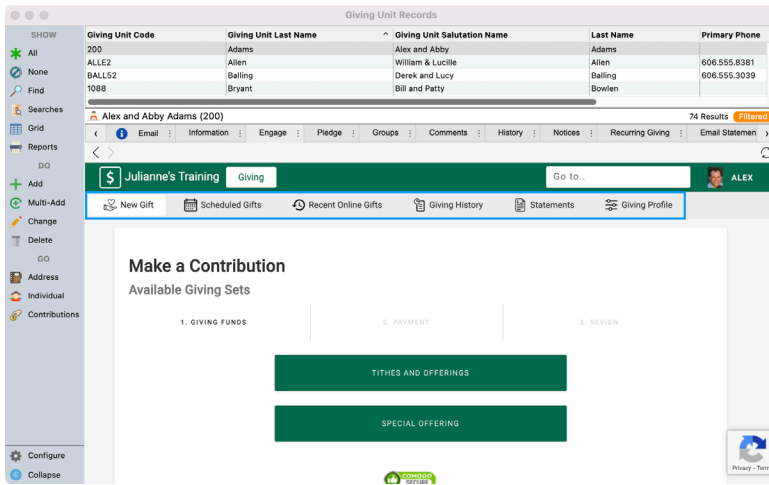
This is done on the Giving Unit Record window.

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.

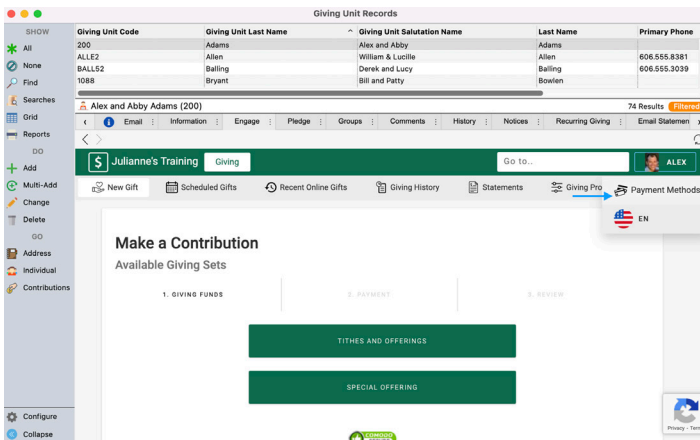


Other Engage activities such as viewing **Scheduled Gifts**, repeating **Recent Online Gifts**, or viewing **Statements** can all be done through the Engage menu tools.



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

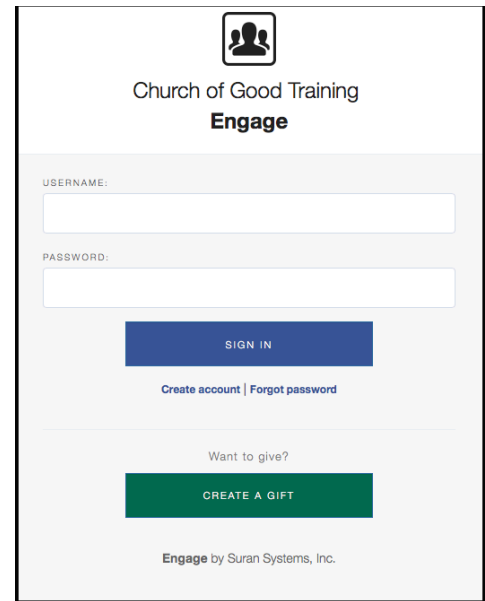
As a QR code:



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

SHOW	Last Name	Salutation Name	Primary Phone
All	Adams	Alex and Abby	
None	Allen	William & Lucille	606.555.8381
Find	Andrews	Robert & Elizabeth	828.626.3535
Searches	Balling	Derek and Lucy	606.555.3039
Grid	Bandy		
Print	Big City Gazette		606.555.8826
DO	Brown	Melvin & Dorothy	415.555.0889
Add	Bryant	Bill and Patty	606.555.3584
Multi-Add	William & Lucille Allen		

Code	Mailing Name	Salutation	Last Name	Individuals
ALLE2	William & Lucille	William & Lucille	Allen	Lucy Allen, Bill Allen, Jenny Allen, Jesse Allen

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

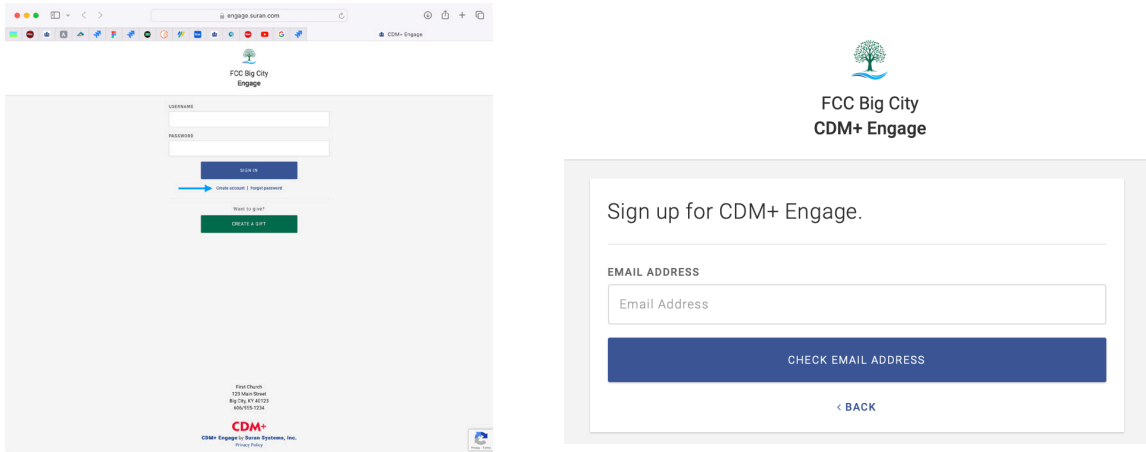
Contact your givers explaining:

- 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.

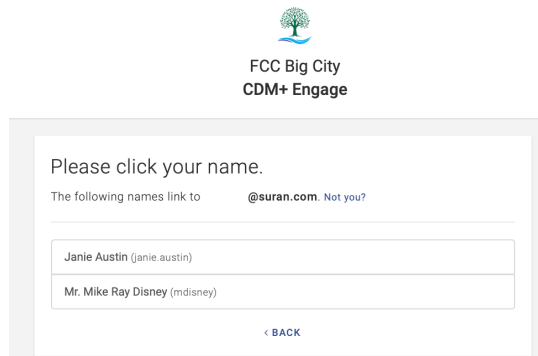
Creating a New Account – Members

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



Create a username.

Please enter a username for **John Smith**. Further instructions will then be sent to **john.smith@example.com**.

USERNAME

CREATE USERNAME

< BACK

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.

We received a request to reset your CDM+ Engage password.

Username **janie.austin**

Reset Password Link [Click Here](#)

Reset Password Code **db854b50-36f0-013d-40f5-0c4de9c946a8**

If you need help, please contact CDM+ Essentials Webinar

Enter password reset code.

A password reset code has been emailed to your email. This email will be sent from support@cdmplus.com. Please make sure any spam or junk email filters you have will allow this message through.

PASSWORD CODE

CHECK CODE



First Church 234 Big City Drive Big City, KY



Powered by CDM+ Engage from Suran Systems, Inc.

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**.

Church of Good Training
Engage

USERNAME:
PASSWORD:

SIGN IN

Create account | Forgot password

Want to give?

CREATE A GIFT

Engage by Suran Systems, Inc.

FCC Big City
CDM+ Engage

Sign up for CDM+ Engage.

EMAIL ADDRESS
john.smith3@example.com

No users found for john.smith3@example.com.

Click here to create a new account.

CHECK EMAIL ADDRESS

< BACK

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**.

FCC Big City
CDM+ Engage

Create a new account.

FIRST NAME LAST NAME
First Name Last Name

EMAIL ADDRESS
John.smith3@example.com

ADDRESS
Address

ADDRESS LINE 2
Address Line 2

CITY
City

COUNTRY STATE ZIP
United States State Zip

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

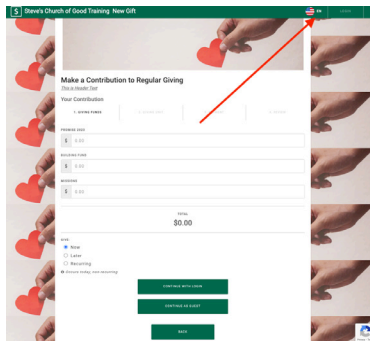
The visitor/guest is then prompted to create a password for future use.

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)

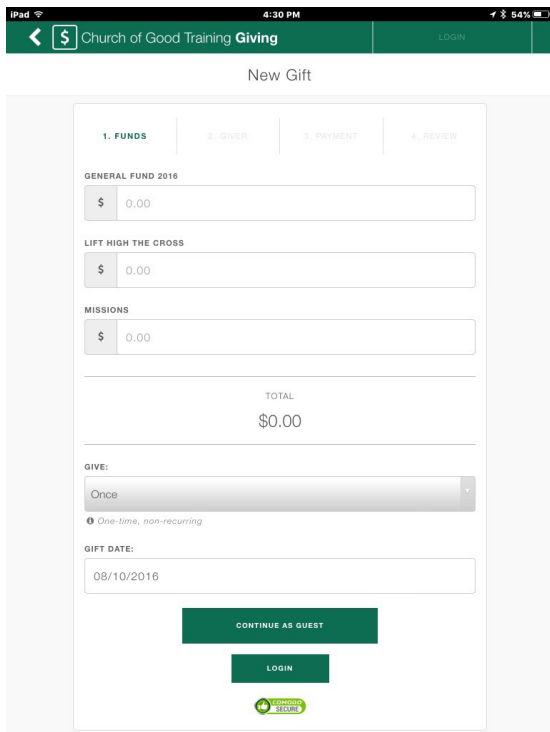


Clicking the green Create a Gift button will open the “New Gift” entry screen.

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.



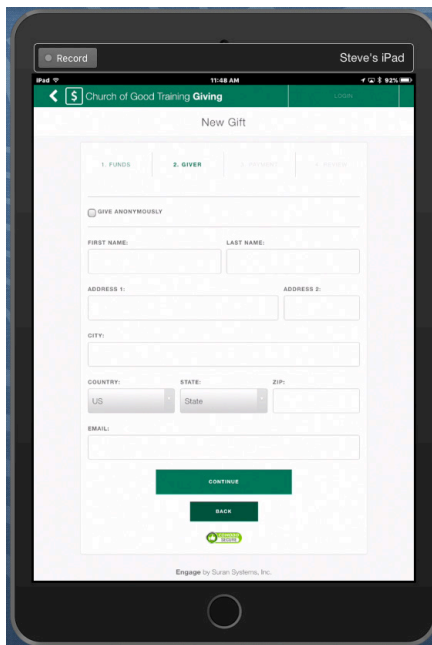
The giver can choose one, multiple, or all Giving Funds for this gift.

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+.

Make a Contribution to Annual Fund

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas elementum odio nec felis. Proin lacinia augue non pede. Donec vitae nisi a eros congue laoreet. Sed nisi velit, pharetra a, adipiscing eget, curam vel, velit. Cras leo libero, rutrum et, varius sed, auctor sodales, risus. Mauris tristique. Maecenas aliquam, sem sed tempus dapibus, velit metus ante

Your Contribution

- 1. GIVING FUNDS
- 2. GIVING UNIT
- 3. PAYMENT
- 4. REVIEW

Refunds will be provided upon request and approval by Webinar.

PAYMENT INFORMATION

CREDIT CARD BANK ACCOUNT

ACCEPTED CARDS



CARD NUMBER

4111111111111111

MONTH

12

YEAR

2029

CVV

234

BILLING INFORMATION

SAME AS GIVING UNIT

For questions regarding contribution payments, please contact Webinar at Webinar@example.com or (800) 633-9581.

CONTINUE

BACK



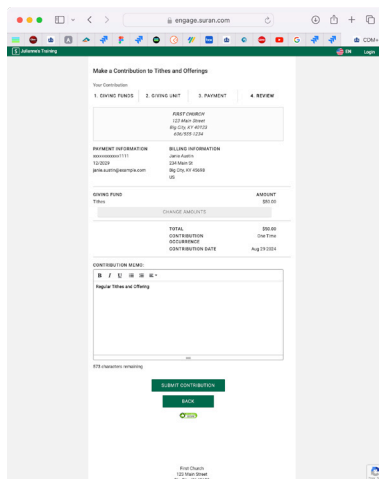
Footer Text

First Church
123 Main Street
New York, NY 10001

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.

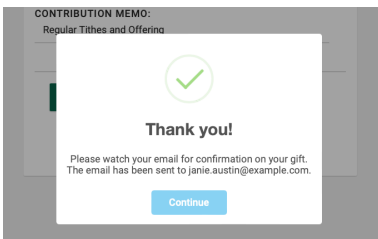
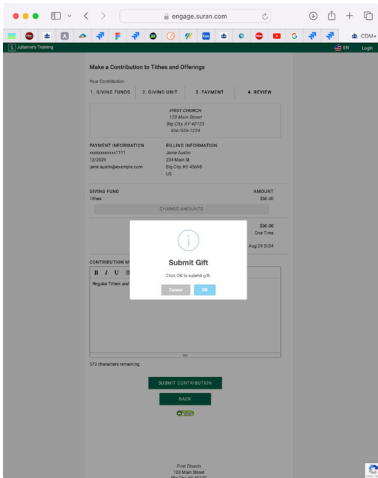
If needed, the giver can click or tap the **Back** button to make changes.

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

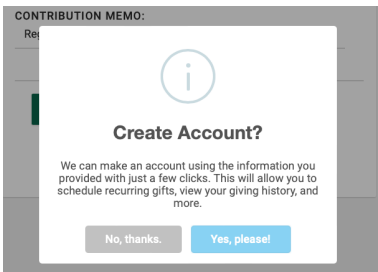
A **Submit Gift** pop-up window appears with two options: **Cancel** or **OK**.

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

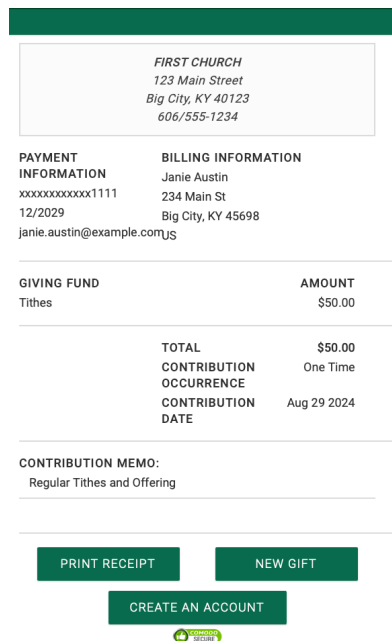
At this point, the gift is being processed. While it processes, three dots appear and move, indicating the process is working.



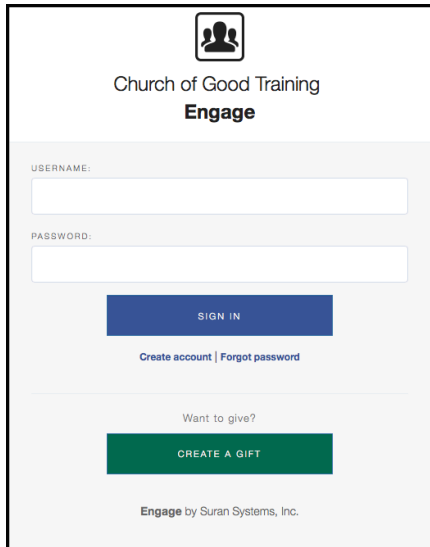
Once the gift has completed processing, the **Thank you** Window appears. After clicking **Continue**, Engage will ask the giver if they want to create an account. If the giver clicks Yes, they will be directed to create an account as described above. Engage will use the email from the gift to attempt 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

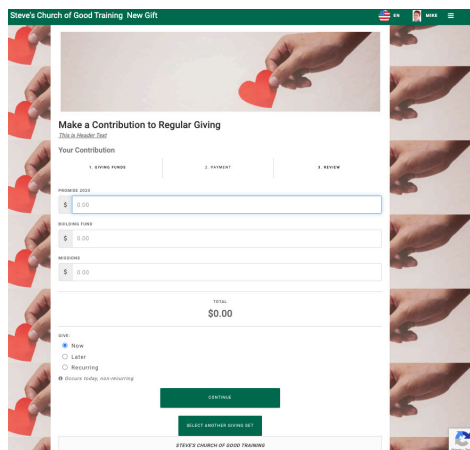


The screenshot shows the login interface for the Church of Good Training Engage system. At the top, there is a logo with three people icons and the text "Church of Good Training Engage". Below the logo are two input fields: "USERNAME:" and "PASSWORD:". A blue "SIGN IN" button is positioned below the password field. Underneath the button are links for "Create account" and "Forgot password". A green "CREATE A GIFT" button is located further down. At the bottom, there is a link "Want to give?" and the text "Engage by Suran Systems, Inc."

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.



The screenshot displays the "New Gift" entry screen. The title is "Steve's Church of Good Training New Gift". The main heading is "Make a Contribution to Regular Giving". Below this, there are three tabs: "GIVING FUNDS", "PAYMENT", and "REVIEW". The "GIVING FUNDS" tab is active. It contains three input fields: "PAID AMOUNT" (with a dropdown menu), "BALANCE FUND" (with a dropdown menu), and "AMOUNT" (with a dropdown menu). Below these fields, the "TOTAL" is displayed as "\$0.00". At the bottom, there are two buttons: a green "CONTINUE" button and a smaller "SELECT ANOTHER GIVING SET" button. The footer includes "STEVE'S CHURCH OF GOOD TRAINING" and "© 2024 Steve's Church".

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.

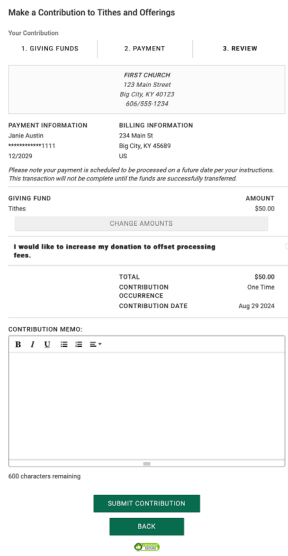
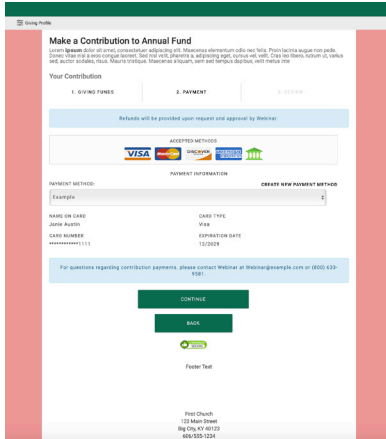
All stored funding sources are available with the most recent account used selected by default.

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**.



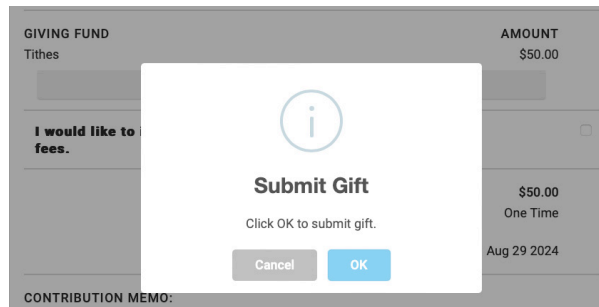
Next, the donor is presented with a New Gift confirmation screen containing the information entered: payment information and the details of the gift.

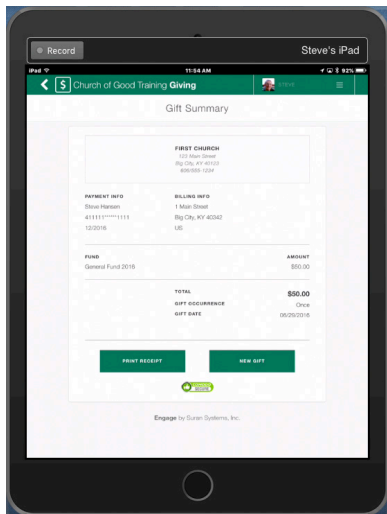
If FEE ASSIST is enabled, the donor check the box on the line reading - I would like to increase my donation to offset processing fees” appears. If the donor has set this as their default, CDM+ Engage will calculate and display the added fees. If they have not set as their default, they can still elect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

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

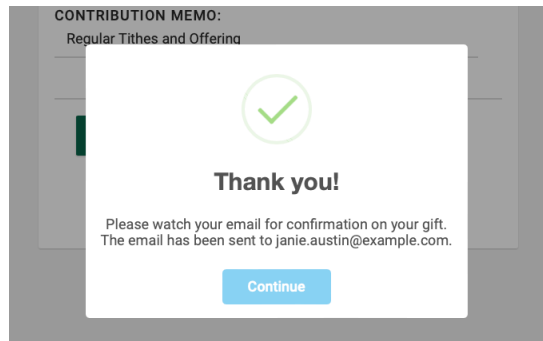
The donor may click or tap the **Back** button to make changes, or the **Submit Contribution** button to proceed.

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.

From: Steve's Church of Good Training ronreply@suran.com
 Subject: Steve's Church of Good Training: Thank you for your Gift
 Date: September 6, 2023 at 3:53 PM
 To: steve@cyber-ras.com

From: Steve's Church of Good Training ronreply@suran.com
 Subject: Steve's Church of Good Training: Pending Contribution Submitted
 Date: September 6, 2023 at 3:53 PM
 To: steve@suran.com

Use the Processing Pending Contribution window in CDM+ to process this gift into Contribution Records.

Thank you for your payment!

I want to say thank you for your donation to The Church of Good Training. We're honored you would bless us with your generosity. Donations like yours make a big difference in the work our church is doing in the community and around the world. Without givers like you, our church would not have the impact or influence it does. Because we're a tax-exempt nonprofit, you also get to write this donation off on your taxes. At the end of the year, we'll send you an annual recap with how much you've given to the church. The Church of Good Training. Sincerely, Pastor Dean Patterson, Lead Pastor Per IRS regulations, we state that the only benefit received by the donor is an intangible religious one.

Giver

Steve Hansen
 727 East Sherwood Avenue
 St. Paul
 MN
 55106-1714

Payment

*****7890
 ****0269*
 ACH

Giver

Steve Hansen
 727 East Sherwood Avenue
 St. Paul
 MN
 55106-1714
steve@cyber-ras.com

Gift

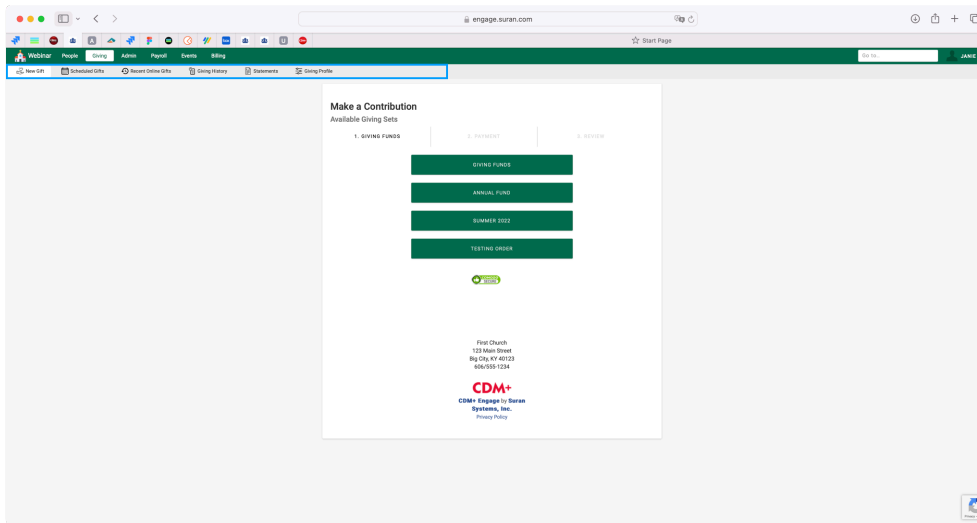
9/6/2023
 11642
 Processing
 0 - APPROVED SUCCESS. The Payment was created successfully
 Engage (Guest)
 \$10.00

Details

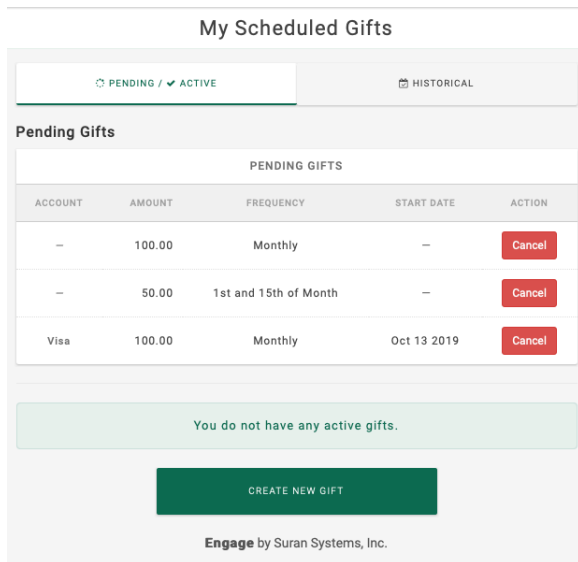
John & Mary Peterson
 €10.00

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.

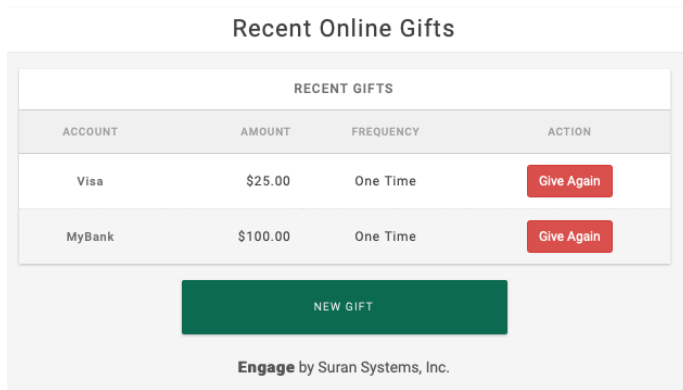
Active Gifts are those that have been created and processed at least once and which are scheduled to process again.

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

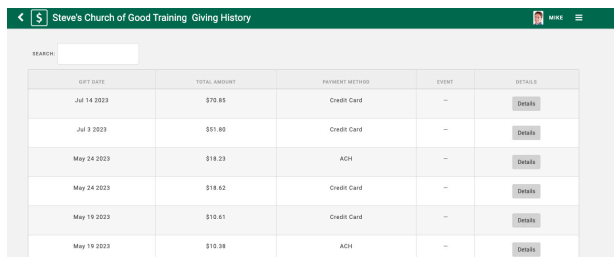
Example 1: a one-time gift given last week is historical

Example 2: a one-time gift given today would be pending

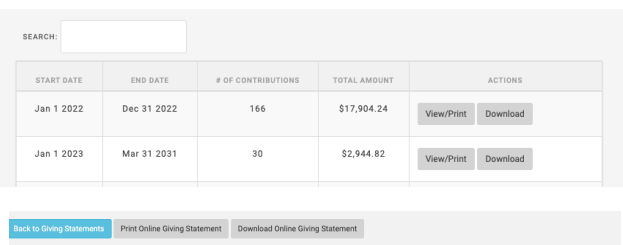
Example 3: a recurring gift scheduled as monthly for 6 months will show as Active during those 6 months, but as historical after the 6 months.



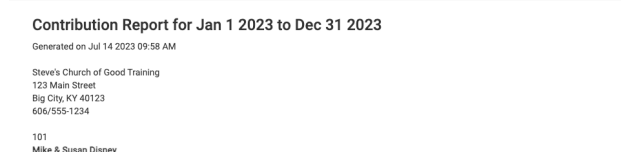
Recent Online Gifts displays the last several gifts that have been made with an option to Give Again. If **Give Again** is selected, the gift confirmation window opens for the donor to confirm the gift.



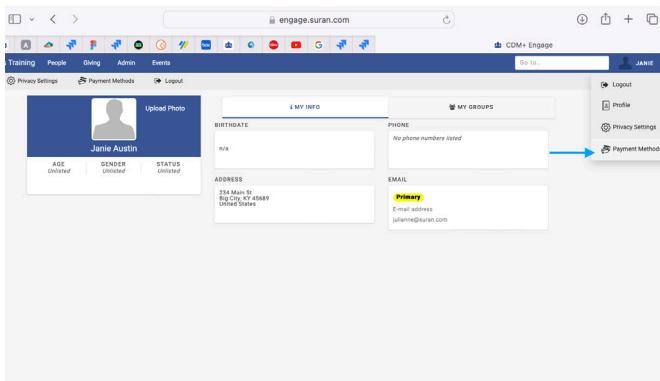
Giving History – displays a history of the member’s giving, both in-person and online.



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.



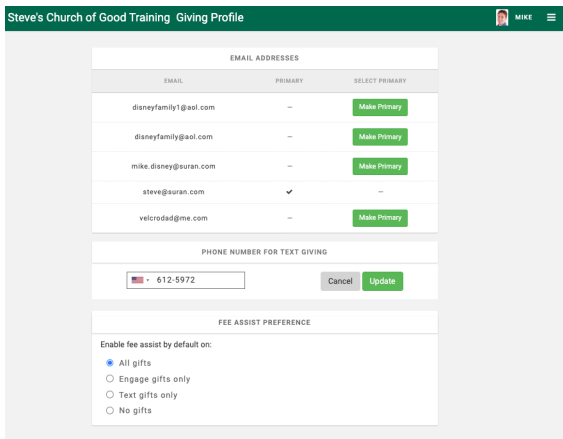
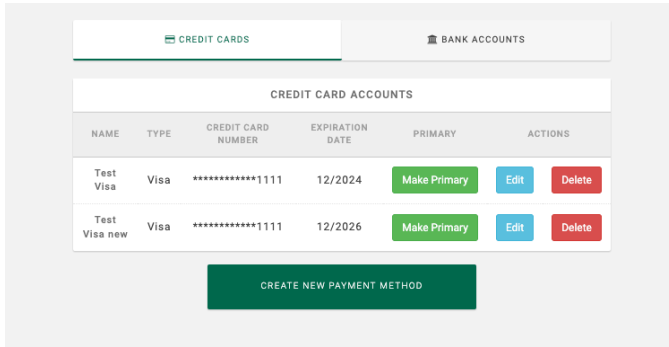
Multiple batches may be shown – 1st quarter, 2nd quarter, Year-end 2022, Year-end 2023, and so on.



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..

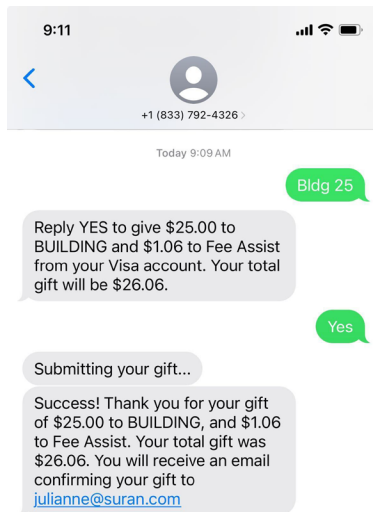
Using Engage Text Giving

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.

Individual with this text giving number was not found. Please visit <https://engage.suran.com/juliannetraining/2ca43qAdeMZwRfRaOu9EpA> to make your gift.

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

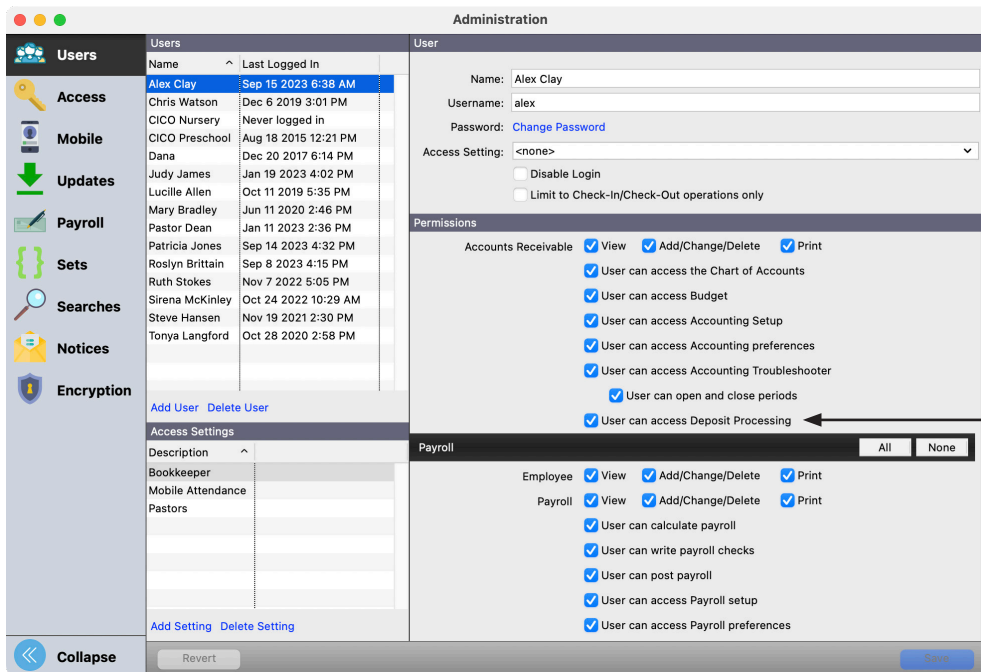
To allow a person to access the Process Pending Contributions window, you must check the box next to Process Pending Contributions under Contributions. Note: scroll down on the window to view all user access settings.

The screenshot displays the 'Administration' window with the 'Users' tab selected. A table lists users with columns for Name and Last Logged In. 'Alex Clay' is highlighted. To the right, the 'User' details for Alex Clay are shown, including Name, Username (alex), Password (Change Password), and Access Setting (<none>). Below this, the 'Permissions' section is expanded, showing a list of permissions with checkboxes for View, Add/Change/Delete, and Print. The 'Process Pending Contributions' permission is checked. At the bottom, the 'Accounting' section is visible, with a 'Save' button.

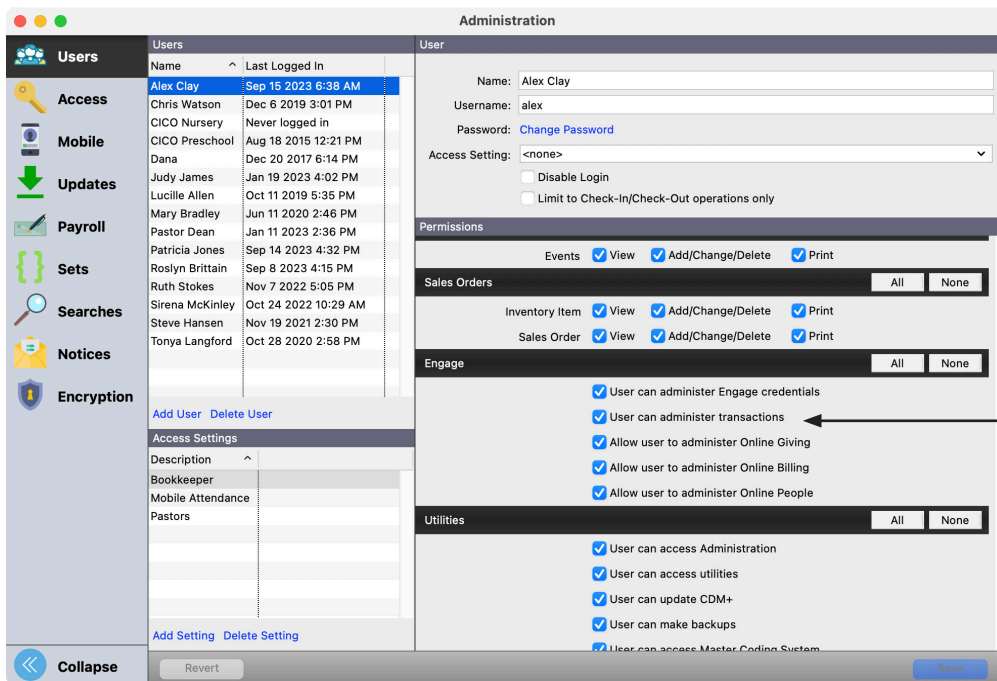
Name	Last Logged In
Alex Clay	2023-09-15 06:38:53
Chris Watson	2019-12-06 15:01:50
CICO Nursery	Never logged in
CICO Preschool	2015-08-18 12:21:20
Dana	2017-12-20 18:14:07
Judy James	2023-01-19 16:02:53
Lucille Allen	2019-10-11 17:35:42
Mary Bradley	2020-06-11 14:46:45
Pastor Dean	2023-01-11 14:36:31
Patricia Jones	2023-09-14 16:32:57
Roslyn Brittain	2023-09-08 16:15:49
Ruth Stokes	2022-11-07 17:05:10
Sirena McKinley	2022-10-24 10:29:32
Steve Hansen	2021-11-19 14:30:28
Tonya Langford	2020-10-28 14:58:14

Accounting	View	Add/Change/Delete	Print
Ledger	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounts Payable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounts Receivable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User can access the Chart of Accounts	<input checked="" type="checkbox"/>		
User can access Budget	<input checked="" type="checkbox"/>		

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

Giving Funds

Note that when adding a Pledge Giving Fund it is highly recommended a separate Giving Fund be entered for each Pledge eg: General Fund 2022, General Fund 2023, Building Fund 2021, 2024 etc.

Description	Not Tax-Deductible	Inactive	Default	Income Account	Fee Account
General Fund 2023	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	4000 Sunday Worship Offering - 3000.400	5135 Credit Card Processing - 3000.5135.
General Fund 2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	4010 Loose Offering - 3000.4010.F	5135 Credit Card Processing - 3000.5135.
Operating Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	4000 Sunday Worship Offering - 3000.400	5135 Credit Card Processing - 3000.5135.
New Building Fund 2021-2024	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	4100 Building Fund Income - 3100.4100.T	5135 Credit Card Processing - 3000.5135.
Missions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	4110 Missions Fund Offering - 3110.4110.T	5135 Credit Card Processing - 3000.5135.
Building Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	4100 Building Fund Income - 3100.4100.T	5135 Credit Card Processing - 3000.5135.
Capital	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	4100 Building Fund Income - 3100.4100.T	5135 Credit Card Processing - 3000.5135.
FTH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	4200 Special Fund Income - 3200.4200.T	5135 Credit Card Processing - 3000.5135.
Memorial	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	4110 Missions Fund Offering - 3110.4110.T	5135 Credit Card Processing - 3000.5135.
A/C Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	5190 General Maintenance - 3000.5190.K	5135 Credit Card Processing - 3000.5135.
Recreation Teams	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	4200 Special Fund Income - 3200.4200.T	5135 Credit Card Processing - 3000.5135.
Camps	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	4200 Special Fund Income - 3200.4200.T	5135 Credit Card Processing - 3000.5135.

Show: **All**

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

Event Records

Event Description	Location	Beginning	Ending
Midwinter Youth Retreat	Camp Christian Conference Center Gordon, GA	Feb 15 2020 5:00 PM	Feb 17 2020 12:00 PM
Sunday Morning Worship (Limited Seating)	Church Building	Jun 14 2020 8:00 AM	Jun 14 2020 9:30 AM
Gala 2022		Oct 31 2022 7:00 PM	Oct 31 2022 10:00 PM
Fall Couples Retreat	Gatlinburg Resort	Nov 26 2023 6:00 PM	Nov 26 2023 8:00 PM
2023 Winter Event		Dec 31 2023 12:00 AM	Dec 31 2023 11:59 PM

5 Results Filtered

Event Information : Activities : Connections :

Description: Camp/Youth Event

Location: Registration Closed

Include Time

Begin Date: Registration Fee:

End Date: Maximum Registration:

Registration Deadline: Current Registration:

Skip Individual Record lookup when adding a new registration

Payment Account: Young Adult Ministries (3000.5400.J)

Fee Account: Credit Card Processing (3000.5135.I)

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

Engage Billing

Credit card surcharge percent

ACH surcharge amount

Surcharge Account

Fee Account

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)

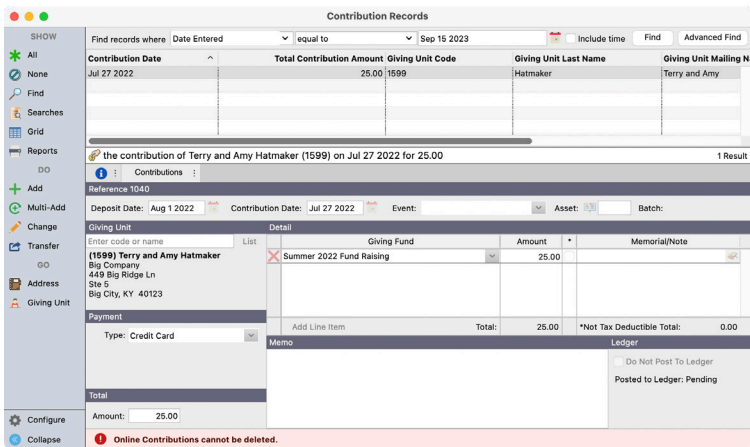
Giving Unit... Name	Date	Amount
	Jul 13 2022	100.00
	Jul 18 2022	100.00
Alex Clay	Jul 18 2022	75.00
test test	Jul 27 2022	9.00
J Smith	Oct 28 2022	206.28
Jerry Smith	Aug 3 2022	100.00
Jim Smith	Jul 28 2022	200.00
Joe Smith	Jul 26 2022	206.28
Joe Davidson	Jul 5 2022	100.00
Terry Hatmaker	Jul 27 2022	25.00
SALL 439 test sallee	Nov 11 2022	11.00

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.

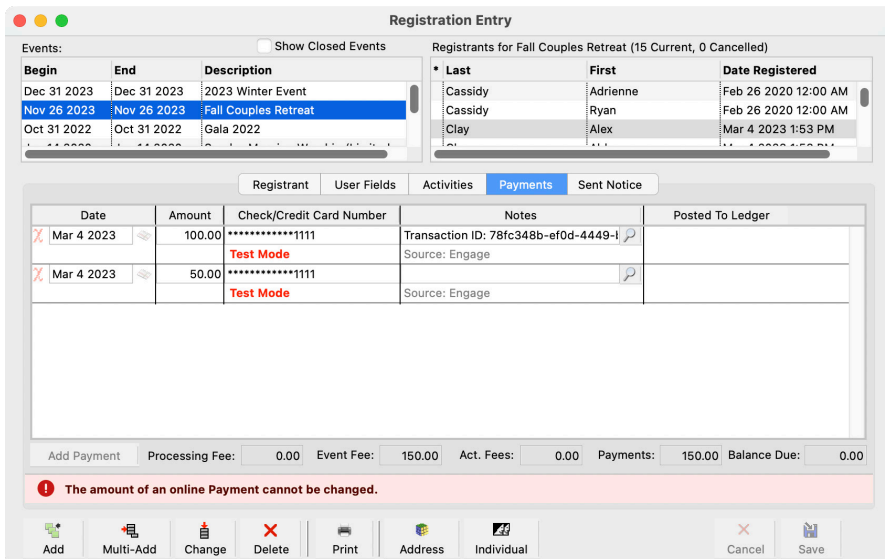
Only those gifts that you have marked as Ready for Processing (green dot) will be processed when you click the Save button. To Mark for Processing, highlight a gift and either press Cmd-K (Mac) or Ctrl-K (Windows) on the keyboard or click the Mark for Processing button on the top of the window.



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

The screenshot shows the 'Deposit Processing' window. On the left, a table lists deposits with columns for Date, Gross, and Net. The deposit for May 3, 2023, is highlighted in blue. On the right, the 'Breakdown by Transactions' table shows four entries for April 28, 2023, with various amounts and descriptions. Below that, the 'Breakdown by Accounts' table shows a list of accounts with their respective amounts.

Date	Gross	Net
Nov 18 2022	154.79	149.39
Nov 23 2022	403.00	389.85
Dec 1 2022	106.15	105.85
Dec 20 2022	176.79	170.13
Dec 23 2022	500.00	483.83
Jan 3 2023	106.15	105.85
Jan 5 2023	300.00	288.04
Jan 6 2023	252.32	252.02
Jan 20 2023	252.32	252.02
Feb 2 2023	358.47	357.87
Feb 16 2023	252.32	252.02
Mar 2 2023	252.32	252.02
Mar 3 2023	106.15	105.85
Mar 9 2023	400.00	385.79
Mar 16 2023	252.32	252.02
Mar 23 2023	50.00	47.86
Mar 30 2023	252.32	252.02
Mar 31 2023	106.15	105.85
Apr 6 2023	735.00	710.36
Apr 13 2023	878.65	846.85
Apr 20 2023	154.79	149.39
Apr 27 2023	60.50	57.16
May 3 2023	106.15	105.85
May 4 2023	5.00	4.28
May 8 2023	500.00	483.83

Date	Amount	Fee	Source	Description
Apr 28 2023	15.00	0.04	CDM+	Needy Families - 15.00 (Apr 28 2023) from Steve and
Apr 28 2023	15.00	0.04	CDM+	Building Fund - 15.00 (Apr 28 2023) from Steve and
Apr 28 2023	75.00	0.21	CDM+	Operating Fund - 75.00 (Apr 28 2023) from Steve and
Apr 28 2023	1.15	0.01	CDM+	Fee Assist - 1.15 (Apr 28 2023) from Steve and Carc

Amount	Account
0.30	3000.5135.I-Credit Card Processing
1.15	3000.4135.I-Fee Assist Donations
15.00	3100.4100.T-Building Fund Income
15.00	3200.4200.T-Special Fund Income
75.00	3000.4000.F-Sunday Worship Offering

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.

This screenshot shows the 'Deposit Processing' window with the deposit for May 8, 2023, selected. The 'Breakdown by Transactions' table now shows a single entry for May 3, 2023, with a Transaction ID. The 'Breakdown by Accounts' table shows two entries for 'Unknown Account'.

Date	Gross	Net
Nov 18 2022	154.79	149.39
Nov 23 2022	403.00	389.85
Dec 1 2022	106.15	105.85
Dec 20 2022	176.79	170.13
Dec 23 2022	500.00	483.83
Jan 3 2023	106.15	105.85
Jan 5 2023	300.00	288.04
Jan 6 2023	252.32	252.02
Jan 20 2023	252.32	252.02
Feb 2 2023	358.47	357.87
Feb 16 2023	252.32	252.02
Mar 2 2023	252.32	252.02
Mar 3 2023	106.15	105.85
Mar 9 2023	400.00	385.79
Mar 16 2023	252.32	252.02
Mar 23 2023	50.00	47.86
Mar 30 2023	252.32	252.02
Mar 31 2023	106.15	105.85
Apr 6 2023	735.00	710.36
Apr 13 2023	878.65	846.85
Apr 20 2023	154.79	149.39
Apr 27 2023	60.50	57.16
May 3 2023	106.15	105.85
May 4 2023	5.00	4.28
May 8 2023	500.00	483.83

Date	Amount	Fee	Source	Description	Transaction ID
May 3 2023	500.00	16.17	CDM+		85efe94d-9291-498a-b5c9-d111b

Double click on lines with 🚫 to select accounts

Amount	Account
16.17	**Unknown Account
500.00	**Unknown Account

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.

Description

Income Account Building Fund Income (3100.4100.T)

Fee Account Credit Card Processing (3000.5135.I)

Note editing the accounts will change the accounts on the related Giving Fund and all outstanding transactions.

Cancel OK

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.

Deposit Processing

Breakdown by Transactions

Date	Amount	Fee Source	Description
Apr 21 2021	15.00	0.00 CDM+	Payment of 15.00 on Apr 21 2021 from
Apr 21 2021	0.30	0.00 CDM+	Payment of 0.30 on Apr 21 2021 from
Apr 21 2021	12.50	0.98 CDM+	Joe's TestHello
Apr 21 2021	0.30	0.00 CDM+	Payment of 0.30 on Apr 21 2021 from
Apr 21 2021	11.00	0.00 CDM+	Payment of 11.00 on Apr 21 2021 from

Breakdown by Accounts

Amount	Account
0.00	**Unknown Account
0.31	3200.7902.O-Merchant Fees
0.86	3150.4150.T-2015 Mission Trip Income
0.96	**Unknown Account
1.35	3000.7905.I-Bank Fees
1.50	3999x.4999.C-Engage Billing Surcharge Fees
3.36	3200.7900.O-Electronic Banking Fees
3.47	3000.5001.I-Fee Assist
7.00	3100.4100.T-Building Fund Income
12.50	**Unknown Account

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.

Deposit Processing

Deposit Processing Posting Report

Deposits Posted To Bank of America Checking

Posted on Sep 15 2023 with posting reference

Reference Number	Transaction Date	Account	Description	Debit	Credit
n/a	Jan 3 2023	3000.5135.I	Credit Card Processing	0.30	0.00
		3000.4000.F	Sunday Worship Offering	0.00	75.00
		3100.4100.T	Building Fund Income	0.00	15.00
		3200.4200.T	Special Fund Income	0.00	15.00
		3000.4135.I	Fee Assist Donations	0.00	1.15
				0.30	106.15

If you have been manually entering deposits and are migrating to using Deposit Processing, you may have deposits 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

Utilities

Show Application Log SQL Commands Clear Records

Restore Registration Payment Card/Check Numbers

Set Custom Version

Set Database Version Number

Set Giving Detail Church Link

Set Logging Level

Shift Budget Breakdown

Sync With Mobile Provisioning Server

Tax Table Maintenance

Toggle Mark Already Processed Button

Uninstall Tax Forms Viewer

Update Template Database

Validate FICA/Medicare

Description

Toggle show mark already processed button on toolbars in Deposit Processing and Process Pending Contributions

Run Special Function

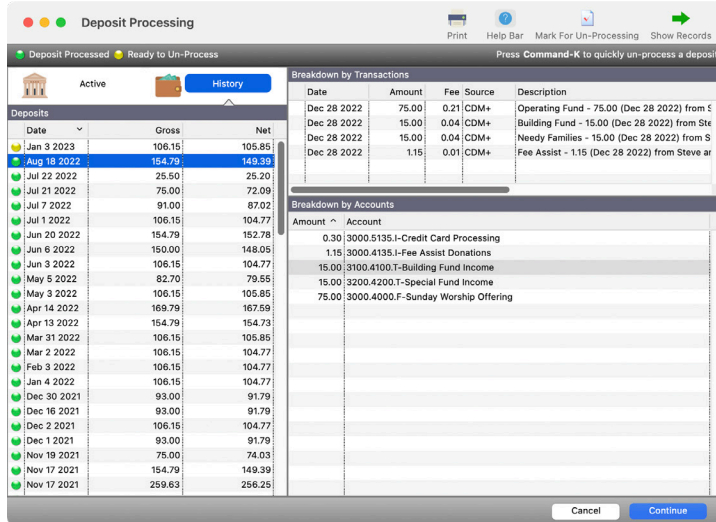
Only perform these functions at the direction of CDM+/Suran Systems, Inc.

Close



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

Working with Processed Deposits

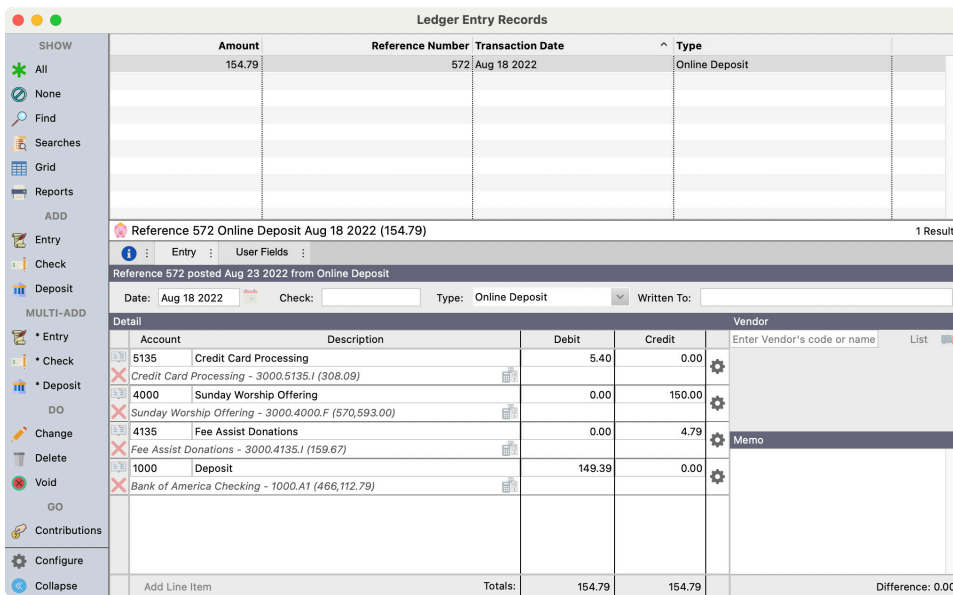


You can click the **History** tab to see a list of deposits you've previously posted. Select a deposit to see its details, and click **Print** to re-print the posting report. You can also jump to the records connected to this deposit by clicking **Show Records**. Double-click a deposit to open it Ledger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

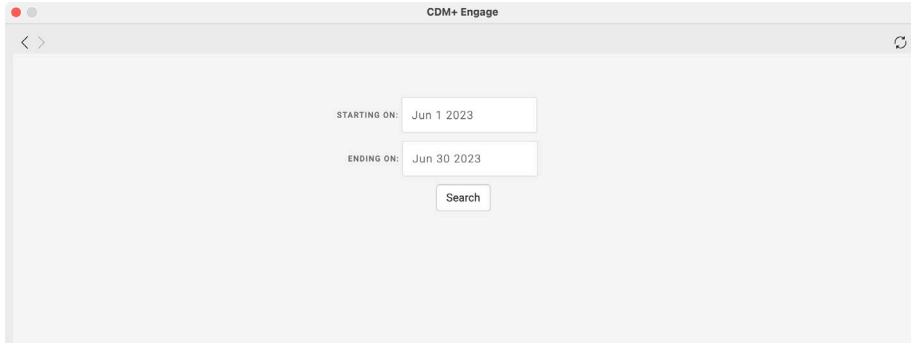


Payment Administration

►Program ►CDM+ Engage ►Search Transactions

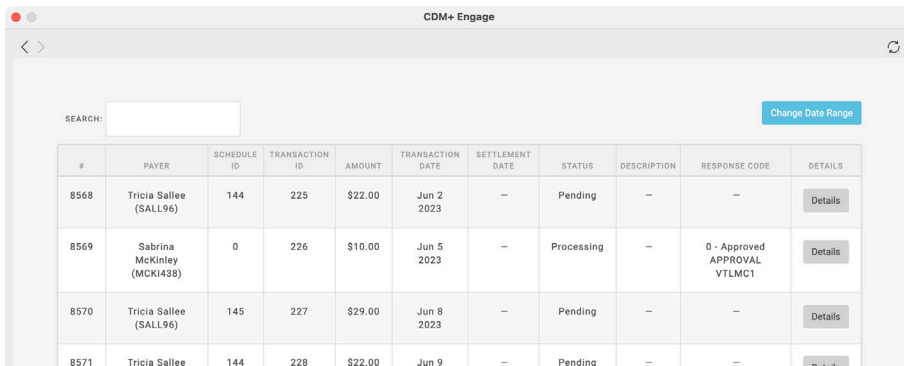
Use the Search Transactions window to locate transactions, view their status, create receipts, and refund transactions. You can access this feature through CDM+ Desktop or by logging into CDM+ Engage.

Search Transaction Records



The screenshot shows the CDM+ Engage search interface. It features two input fields for date ranges: 'STARTING ON:' with the value 'Jun 1 2023' and 'ENDING ON:' with the value 'Jun 30 2023'. Below these fields is a 'Search' button. The interface is titled 'CDM+ Engage' and includes navigation arrows and a refresh icon.

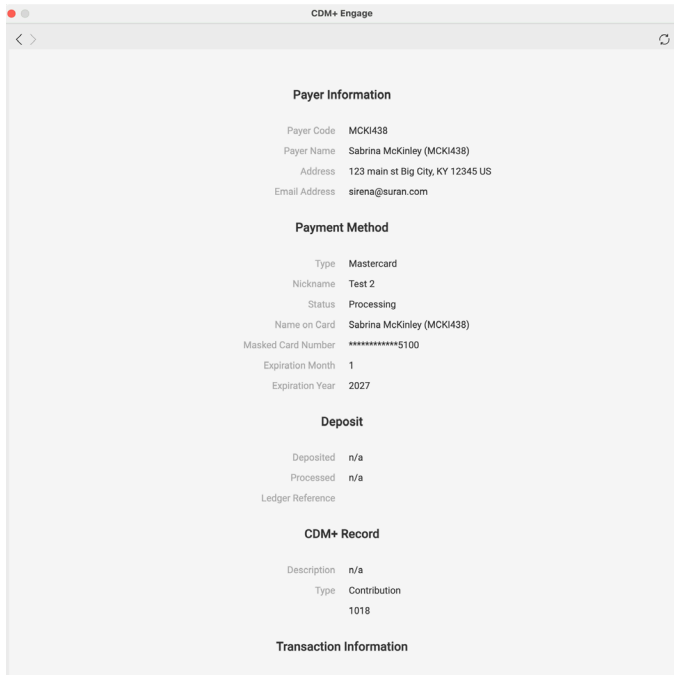
Enter a date range, and click **Search**.



The screenshot shows the search results table in CDM+ Engage. It includes a search bar, a 'Change Date Range' button, and a table with columns for transaction details. The table contains four rows of transaction data.

#	PAYER	SCHEDULE ID	TRANSACTION ID	AMOUNT	TRANSACTION DATE	SETTLEMENT DATE	STATUS	DESCRIPTION	RESPONSE CODE	DETAILS
8568	Tricia Sallee (SALL96)	144	225	\$22.00	Jun 2 2023	—	Pending	—	—	Details
8569	Sabrina McKinley (MCKI438)	0	226	\$10.00	Jun 5 2023	—	Processing	—	0 - Approved APPROVAL VTLMC1	Details
8570	Tricia Sallee (SALL96)	145	227	\$29.00	Jun 8 2023	—	Pending	—	—	Details
8571	Tricia Sallee	144	228	\$22.00	Jun 9	—	Pending	—	—	Details

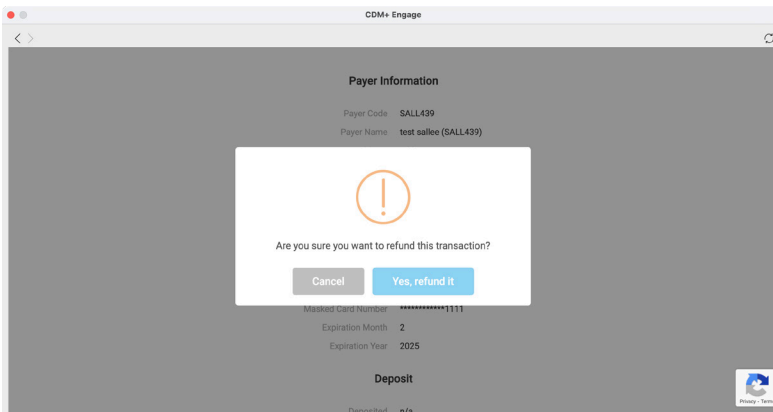
You can use the dynamic search field to search for a specific transaction. For example, you can search by name, amount, date, status, etc. Click the column headers to sort the results by the column. Click **Details** to view more information about a transaction.



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.

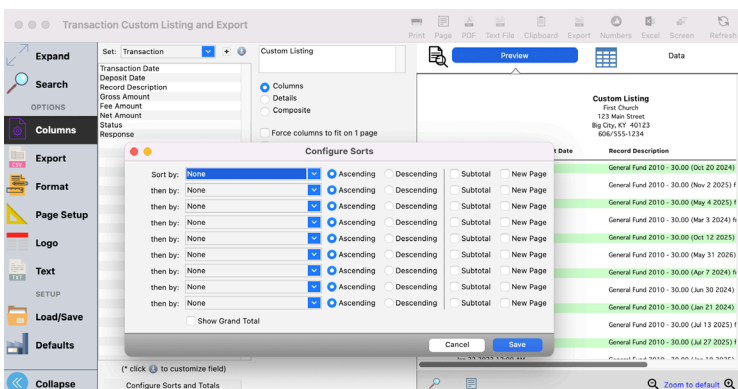
Statuses include:

- **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.



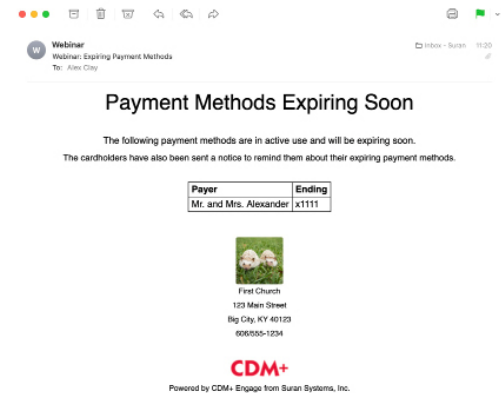
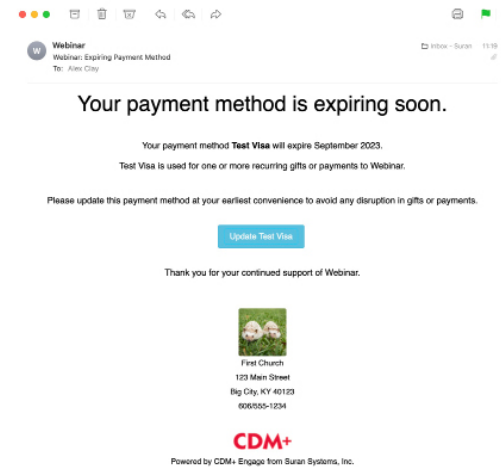
Expiring Cards

CDM+ Engage ► Admin ► Expiring Cards

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

PAYER	PAYMENT METHOD	EXPIRATION	LAST GIFT DATE	NEXT GIFT DATE
Carol Bount	New Payment	Sep 2024	-	Sep 7 2024

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.



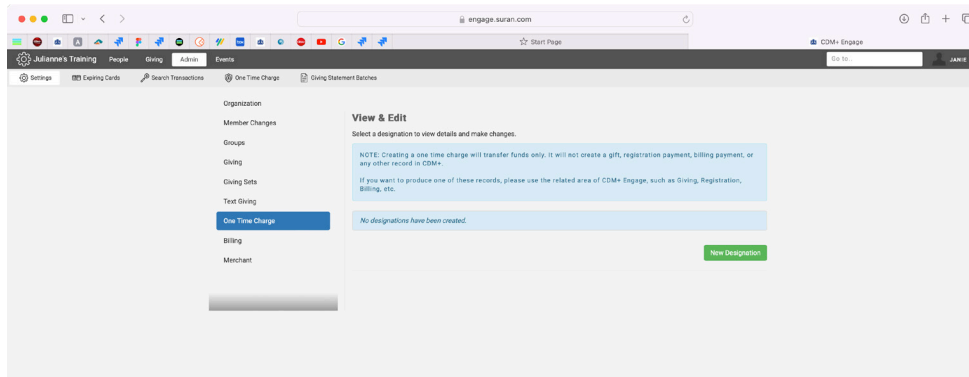
One Time Charge

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

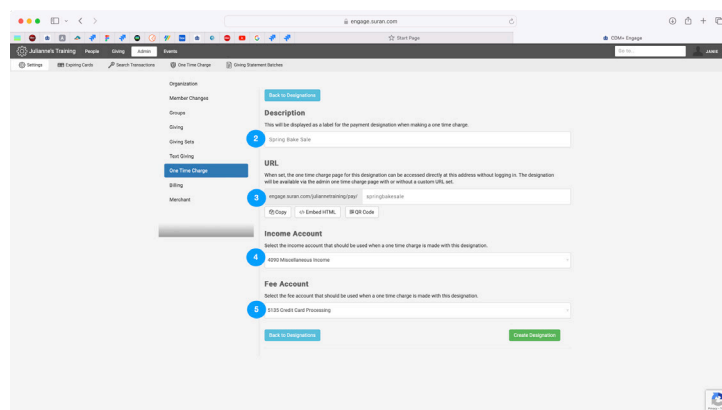
1. Go to **Program ► CDM+ Engage ► Setting**
2. Go to the side bar menu and choose **One Time Charge**



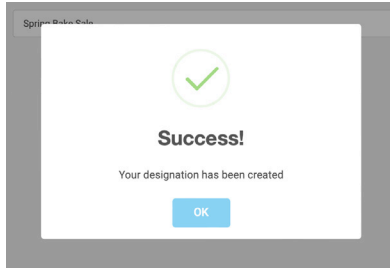
Create a Designation

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.

URL

When set, the one time charge page for this designation can be accessed directly at this address without logging in. The designation will be available via the admin one time charge page with or without a custom URL set.

engage.suran.com/juliannetraining/pay/ springbakesale

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.

NOTE: Creating a one time charge will transfer funds only. It will not create a gift, registration payment, billing payment, or any other record in CDM+.

If you want to produce one of these records, please use the related area of CDM+ Engage, such as Giving, Registration, Billing, etc.

Refunds will be provided upon request and approval by Julianne's Training.

DESIGNATION: Spring Bake Sale AMOUNT: \$ Amount

CREDIT CARD BANK ACCOUNT

ACCEPTED CARDS: VISA, MasterCard, DISCOVER, AMERICAN EXPRESS

CARD NUMBER: [Field] CARD SWIPING: On Off

MONTH: MM YEAR: YYYY CVV: [Field]

FIRST NAME: [Field] LAST NAME: [Field]

ADDRESS 1: [Field] ADDRESS 2: [Field]

COUNTRY: United States POSTAL CODE: [Field]

CITY: [Field] STATE: State

MEMO (OPTIONAL): Memo

For questions regarding one time charge payments, please contact Julianne's Training at example@organization.com or (800) 633-9581.

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

NOTE: Creating a one time charge will transfer funds only. It will not create a gift, registration payment, billing payment, or any other record in CDM+.

If you want to produce one of these records, please use the related area of CDM+ Engage, such as Giving, Registration, Billing, etc.

Refunds will be provided upon request and approval by Julianne's Training.

DESIGNATION: Spring Bake Sale AMOUNT: \$ Amount **1**

CREDIT CARD BANK ACCOUNT

ACCEPTED CARDS: VISA, MasterCard, DISCOVER, AMERICAN EXPRESS

Please select the credit card number field below before swiping a card.

CARD NUMBER: [Field] CARD SWIPING: **On** Off **2**

MONTH: MM YEAR: YYYY CVV: [Field] **3**

FIRST NAME: [Field] LAST NAME: [Field]

COUNTRY: United States POSTAL CODE: [Field] **4**

CITY: [Field] STATE: State

MEMO (OPTIONAL): Memo

For questions regarding one time charge payments, please contact Julianne's Training at example@organization.com or (800) 633-9581.

5 SUBMIT ONE TIME CHARGE

Card Swiper Status

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

Please select the credit card number field below before swiping a card.

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

Ready to swipe.

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.

Card was swiped in the wrong field. Please try again.

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.

Designation	Spring Bake Sale
Amount	\$20.00
Name	Mike Disney
Account Schedule GUID	1b1f208e-7fea-44ab-946a-dd398c2e4eb8
Response Code	0
Transaction Status	CLEARED

[SUBMIT ANOTHER ONE TIME 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.

NOTE: Creating a one time charge will transfer funds only. It will not create a gift, registration payment, billing payment, or any other record in CDM+.

If you want to produce one of these records, please use the related area of CDM+ Engage, such as Giving, Registration, Billing, etc.

Refunds will be provided upon request and approval by Julianne's Training.

DESIGNATION	AMOUNT
<input checked="" type="checkbox"/> No Designation selected	\$ Amount
<input type="checkbox"/> Spring Bake Sale	
<input type="checkbox"/> T-shirts	

Please select the credit card number field below before swiping a card.

CARD NUMBER	CARD SWIPPING	
<input type="text"/>	<input type="checkbox"/>	
MONTH	YEAR	CVV
MM	YYYY	
FIRST NAME	LAST NAME	
<input type="text"/>	<input type="text"/>	
COUNTRY	POSTAL CODE	
United States	<input type="text"/>	
CITY	STATE	
<input type="text"/>	State	
MEMO (OPTIONAL)		
<input type="text"/>		

For questions regarding one time charge payments, please contact Julianne's Training at example@organization.com or (800) 633-9561.

[SUBMIT ONE TIME CHARGE](#)

