

# IconCMO + Bambora Online Giving Integration

## Account Set-up

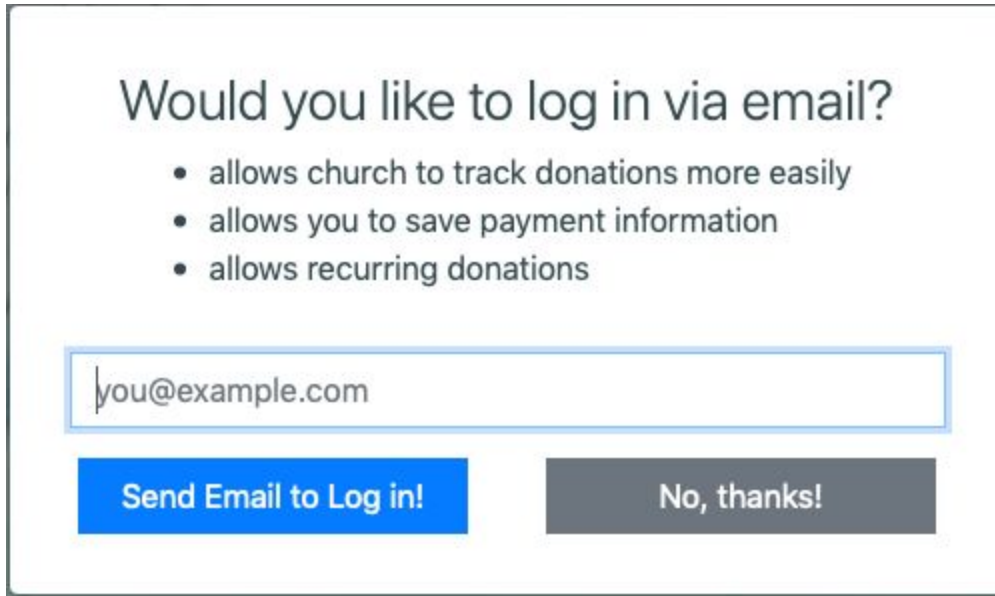
- If you haven't already, sign up for a Bambora account at <https://partners.na.bambora.com/icon-systems/>
- Log into your Bambora account and go to Configuration→Payment Profile Configuration
- Under “Credit Card Settings” de-select the checkbox next to the “Do not allow profile to be created with card data duplicated from an existing profile” setting and click “Update”

### ▼ Credit Card Settings

- Require card validation
- Do not allow profile to be created with card data duplicated from an existing profile
- Maximum number of cards shown

## Online Giving

- Donors can make contributions to your church online\* by going to <https://secure1.iconcmo.com/online-giving/enter-email/?id=5555555555>
- **\*Important:** be sure to replace the placeholder phone number 5555555555 with your church's log-in phone number for IconCMO.



Would you like to log in via email?

- allows church to track donations more easily
- allows you to save payment information
- allows recurring donations

you@example.com

Send Email to Log in! No, thanks!

The image shows a user interface for logging in via email. It features a title, a list of benefits, an email input field with a placeholder, and two buttons: 'Send Email to Log in!' and 'No, thanks!'.

## Recurring Transactions

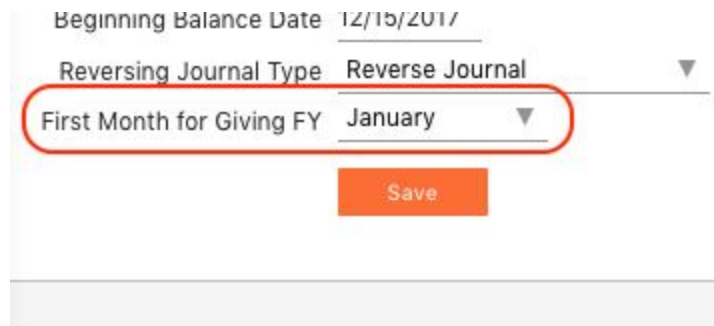
- Please note: donors can only schedule a recurring transaction or save their payment information if they log-in using their email address. If donors click “No, thanks!” and don’t sign in, they can still make a one-time donation and their payment information is not saved.
- Only contribution funds marked as “available in online giving” will be presented.

## Batch Import

- Importing is done right on the Contributions→Batches→Enter screen by clicking the “Bambora Online Giving Import” button.
- Many donors can be auto-matched based off of their email address. If not, you can select an unmatched donation in the top screen, a matching envelope on the bottom, and click “Match”. Once all transactions are matched, you can send them to contribution entry.
- If we can match a household/individual to an email address, but they don’t yet have an envelope, we’ll automatically create a household envelope.
- Matching is done by the Bambora “profile”. Once we know a match, it is saved and remembered for subsequent imports.
- We only allow imports of less than a month timeframe.
- We ensure that the import is no later than yesterday, to help avoid overlapping imports a bit.
- ACH transactions may have dates outside the imported date range. These dates reflect the *date of the gift*, rather than the date of the deposit. The import date range reflects when the funds were deposited to the church’s bank account.

## Fiscal Year

- The first month of a contribution fiscal year is determined by the “First Month for Giving FY” setting in the Organization→Setup→Information window. If you’re using an alternate fiscal year, update this setting so the system knows when the list of funds shown to donors ought to change.

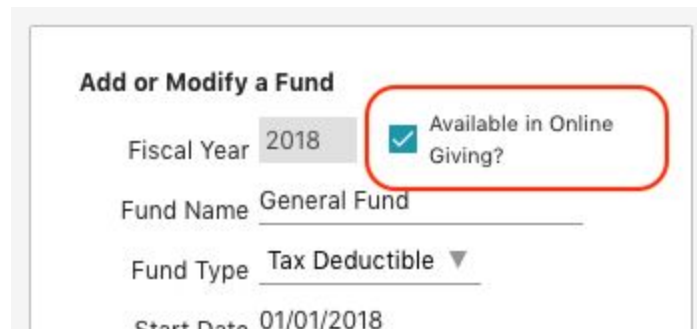


The screenshot shows a form with the following fields:

- Beginning Balance Date: 12/15/2017
- Reversing Journal Type: Reverse Journal
- First Month for Giving FY: January (highlighted with a red circle)
- Save button

## Funds

- Funds are only available for online giving if the “Available For Online Giving?” option is set.



The screenshot shows the 'Add or Modify a Fund' form with the following fields:

- Fiscal Year: 2018
- Available in Online Giving? (checked, highlighted with a red circle)
- Fund Name: General Fund
- Fund Type: Tax Deductible
- Start Date: 01/01/2018

## ACH Transactions

ACH transactions are different than credit card transactions in a couple important ways.

- One-time ACH transactions are scheduled to be submitted in a “batch” to Bambora at the next 7 am Central. All ACH transactions in that batch will end up as a single bank deposit.
  - Email receipts are sent immediately, rather than waiting for later processing.
- They can take [3-5 business days to process](#). (This can be 7 to 9 days.) Transactions after 11:00 am PST (which doesn’t happen for us) start processing the next day.
- While some transactions may fail immediately when submitted, transactions can fail at any time before final settlement. Money will not be withdrawn from the donor’s bank

account until the middle of the processing window and deposited into the church's bank account until the end.

- If an ACH transaction is returned for insufficient funds, a fee **can be charged to the church**.
- We send a email to the donor if their ACH donation failed...this could be several business days after the donation.

We are **not** yet supporting bank transfers for Canadian customers.

## Troubleshooting

A donor lost access to their email account and can't login (i.e. email provider closed, etc.)

If we can prove to ourselves the request is legitimate, we can manually delete the recurring record, and then the donor can log-in with their **new** email address and set up a new donation.

“There was an error in the creation of a Profile. Message: Duplicate match on payment information” when giving.

The church needs to have the “Do not allow profile to be created with card data duplicated from an existing profile” turned to “Off”. (See the Account Set-up section.)