

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” deselect 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

Fiscal Year

- Log into your IconCMO account. 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.

Beginning Balance Date 12/15/2017

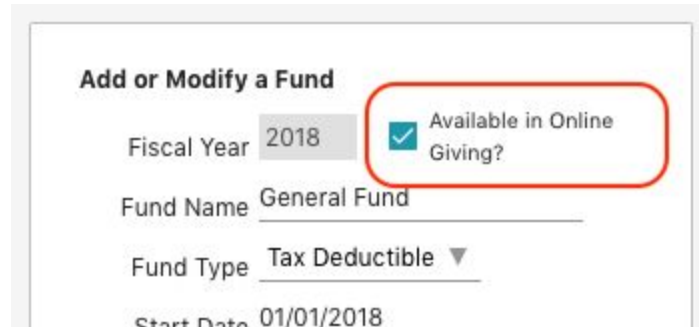
Reversing Journal Type Reverse Journal ▼

First Month for Giving FY January ▼

Save

Funds

- Funds are only available for online giving if the “Available For Online Giving?” option is set. Set this option in your IconCMO account in Contributions→Management→Funds and Pledges.



Add or Modify a Fund

Fiscal Year Available in Online Giving?

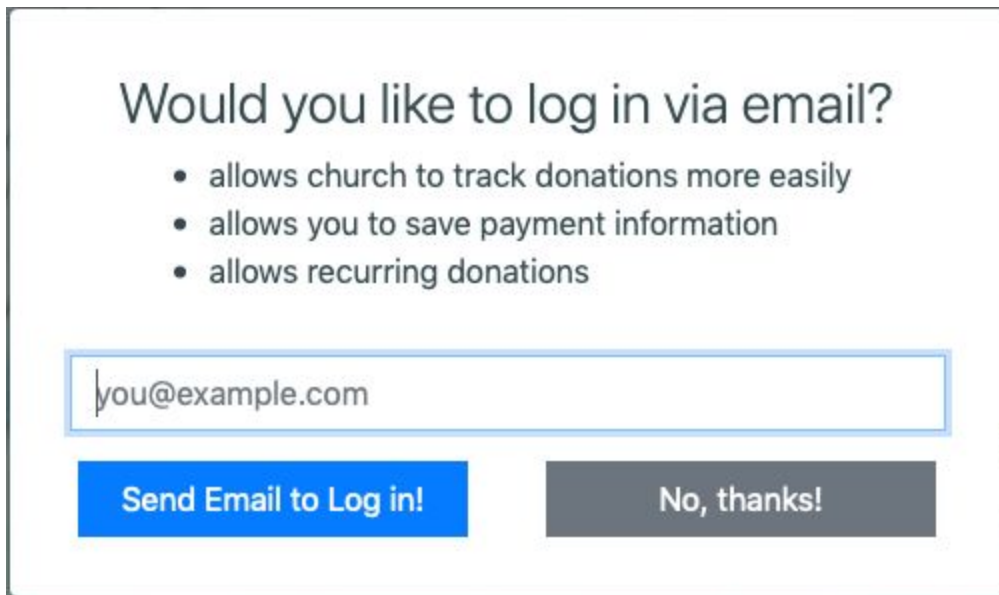
Fund Name

Fund Type ▼

Start Date

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.
- Donors will get the following prompt with the option to log in via an email link.



Would you like to log in via email?

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

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.

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 an email to the donor if their ACH donation failed...this could be several business days after the donation.

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.)