Icon Systems
Church Management Software

WORLDLINE

IconCMO + Worldline Online Giving Integration

Account Set-up

- If you haven't already, sign up for a Worldline account at https://partners.na.bambora.com/icon-systems/
- Log into your Worldline 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

[5 ▽] Maximum number of cards shown

Fiscal Year

- Log into your IconCMO account. The first month of a donation fiscal year is determined by the "First Month for Giving FY" setting in the Settings→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 needs to change.

Reversing Journal Type   Delete Journal   ▼

First Month for Giving FY   January   ▼

Save

Funds

- Funds are only available for online giving if the 'Worldline Giving' option is set. Set this option for each fund in your IconCMO account in Donations→Funds & Donations.

Year	Name	Pledges	Donated	Fund Type	Start Date	End Date	Worldline Giving
	Search...						
2025	Capital Campaign	$26,075.00	$23,604.00	Tax Deductible ▼	01/01/2025	12/31/2025	☐
2025	Disaster Relief	$31,065.00	$25,257.00	Tax Deductible ▼	01/01/2025	12/31/2025	☐
2025	General Fund	$1,917,700.00	$2,135,611.00	Tax Deductible ▼	01/01/2025	12/31/2025	☑
2025	Library Fund	$7,120.00	$0.00	Tax Deductible ▼	01/01/2025	12/31/2025	☐
2025	Missions	$1,910,900.00	$2,094,327.00	Tax Deductible ▼	01/01/2025	12/31/2025	☐

Note: If you do not see the Worldline Giving checkbox, you will need to click on the gear icon in the right corner and add that column under 'Columns to Display'.

Donation Year 2025 ▼	Add New Fund	View Donations	Transfer	Merge Funds	Copy Funds		Fund List
Year Name	Pledges	Donated	Fund Type	Start Date	End Date	Worldline Giving	⚙ 🔍 ⌃

Reset to Defaults   CLOSE

▼ Columns to Display:

| Add a column... ▼ | Year × | Name × | Pledges × | Donated × | Fund Type × | Start Date × | End Date × | Worldline Giving × |

Filter: +

▶ Print and Export:

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.

Please log in via your email address!

You'll get an email in your inbox with a link to click to log in.
Once you've logged in, you can:

- donate immediately to your church
- save payment information for future donations
- set up automatic recurring donations

> you@example.com

Send Email to Log in!

Recurring Transactions
- A donor must select the repeating frequency or choose 'Give Only Once' for a one time gift.
- Only donation funds marked as "available in online giving" will be presented.

Batch Import
- Importing is done right on the Donations→Funds & Donations screen by clicking the Import button and selecting the "WorldLine Import" option.
- Many donors can be auto-matched based on 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 create the batch.
- If we can match a household/individual to an email address, but they don't yet have a donor number, we'll automatically create a household donor number.
- Matching is done by the Wordline "profile". Once a match is recognized, it is remembered for subsequent imports.
- Only imports with a date range of less than a month are allowed to be imported.
- 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 into the church's bank account.

ACH Transactions
ACH transactions are different from credit card transactions in a couple of important ways.
- One-time ACH transactions are scheduled to be submitted in a 'batch' to Worldline the next day at 7am 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.
- ACH can take 3-5 business days to process.
- 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**.
- An email is sent to the donor if their ACH donation fails. This can 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 the request can be proved legitimate, Icon Systems can manually delete the recurring record. The donor can then log-in with their **new** email address and set up a new donation.

An error occurs 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.)