



Feature Summary: New ACH Vendor

Module: Donations 2.0

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Overview

Through Convio's Donations application, organizations can accept donations from constituents via direct deposit from the donor's bank account. This type of transaction processing is called Automated Clearing House (ACH)/ Electronic Funds Transfer (EFT) processing. In order to provide additional options to our clients, Convio is expanding our existing integration with IATS to support then as a partner for ACH/EFT processing through the Convio application.

Key Features & Benefits

Features

- Support for ACH in US and Canada
- Clients can continue processing credit cards with their existing payment gateway (such as, PayFlow Pro) and use IATS for ACH transactions only
- ACH recurring gifts can, like those made with credit card, be managed through the Gift Service Center

Benefits

- ACH typically costs less per transaction than credit card transactions.
- Since bank accounts change less frequently than credit card numbers and never expire, recurring donors who pay with ACH tend to have higher lifetime value than those who pay with credit card.

Considerations for Clients

- Clients who would like to accept ACH with IATS will need to enter into an agreement with IATS
- Clients who already accept ACH with Landmark will not have an automated way to migrate existing recurring donor accounts from Landmark to IATS
- Deployment of IATS ACH integration requires an additional fee

Feature Configuration

Deployment of IATS ACH integration will be performed by Convio. Once you have had ACH deployed on your instance of Convio, you can configure Donation forms to accept ACH as a method of payment.

To prepare your donation form for accepting ACH payments:

1. From the Donation Management page, create a Online Giving form, giving it a name and selecting a donation campaign for the form.
2. Next, select the template for the form and apply the desired name, description, security category and other details on the **Identify Donation Form** page of the process flow.
3. Set donation levels.
4. On the **Design Donor Screens** page, click the **Edit** action for the donation form.

5. The **Payment Type** data element should already be in the right frame of the **Form Designer**. If it is not, select it in the left frame.
6. Click the Add button to move the selection into the right frame.
7. Select **Payment Type**.
8. Click **Save Order and Edit Selected**. The **Edit Data Element** section will display the editing options for the **Payment Type**.
9. On step 5, **Pre-selected payment type**, choose **Bank Account Withdrawal** from the dropdown list.
10. You will still be able to accept credit card payments. If you intend to do so, leave the **Yes, allow donors to pay with a credit card** checkbox selected.
11. Enter any desired changes in the various fields associated with credit card transactions.
12. On step 8, customize the language for the **Bank Account Withdrawal** labels, as desired.
13. You will not be able to allow Amazon and Paypal payments unless the merchant account you applied to this campaign was configured for those processors. If so, those options will be checked by default.
14. Click **Finish**. Complete the configuration of the donation form.

Screen Captures

1. Selecting Bank Account Withdrawal in the Payment Type Data Element

5. Pre-selected payment type:
Choose the payment type that should be pre-selected when the list of types is presented to the donor.

* 6. **Required:**
error message will be displayed if a response is not provided.

2. Canadian version of a donation form with ACH configured

Payment Information	
*Transit Number:	<input type="text"/>
*Bank Number:	<input type="text"/>
*Bank Account Number:	<input type="text"/>
*Verify Bank Account Number:	<input type="text"/>
*Account Type:	<input type="radio"/> Checking <input type="radio"/> Savings
*	<input type="checkbox"/> By checking this option, I agree to use my bank account as a payment method and authorize this organization to debit my bank account to fulfill my donation commitment.

3. US version of a donation form with ACH configured

Payment Information	
*Bank Routing Number:	<input type="text"/> What is this?
*Bank Account Number:	<input type="text"/>
*Verify Bank Account Number:	<input type="text"/>
*Account Type:	<input type="radio"/> Checking
	<input type="radio"/> Savings
*	<input type="checkbox"/> By checking this option, I agree to use my bank account as a payment method and authorize this organization to debit my bank account to fulfill my donation commitment.