



MP e-Giving Integration



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Where do I get support for MP e-giving questions or problems

Questions pertaining to MP e-giving should be directed to Ministry Platform support. **We recommend you use the in-application chat feature.**

1. Click the ? button in the upper right corner of Ministry Platform. This button appears to the left of your initials.
2. Choose your parish and click **Continue**
3. Check mark the **I accept** button and click the **Start Conversation** button

You may also call Phone support at 1-800-669-2509

Why do some payments show “Default Contacts” as the Donor?

When an MP e-giving donor sets up an account, the email address and name they use determines whether or not their giving account will successfully match with their contact record in MP. When a mismatch happens, the payment will be temporarily credited to **Default Contact**.

What causes a failed match?

1. First Name is different: Example: MP e-giving account= Kathy VS MP contact = Kathryn
Or, sometimes the MP e-giving account will have both spouses names in First Name field.
2. Wife set up the MP e-giving account but Donor record is on the husband's MP contact.
3. Last Name is different.
4. Email address is blank on MP contact. (You'll want to update MP contact with the new email address.)
5. Email address has a typo on MP contact. (Please correct the email address in MP.)
6. Email addresses differ. (Consider asking the parishioner if you should be using new email address.)
7. No matching contact: Click the **Create New Donor** button at the bottom of the window, verify the information and click **Save**. (If this person is just a guest, open their contact later and set their **Contact Status** to **Inactive** and use the **Add/Edit Family** tool to set their **Member Type** to **Guest/Visitor**.)

How do I fix a failed match for the future

- a) Click the **Flag** button in the upper right corner and choose **Fix Default Contacts**.
- b) Click the first record on the list.
- c) Click the **Tools** button and choose **Assign Donor**.
- d) Compare the information in the **Notes** field against the donors in the **Possible Match** column and select the appropriate donor. **Be sure to select the donor associated with your parish if there are duplicates. It's OK to select a contact from a different parish.** The donation will be applied to YOUR program/fund. The other parish will not see it. You can still print end-of-year statements.

If your contact is missing an email address or has a typo, update the contact. If the email addresses don't match, consider contacting the parishioner to ask which email to keep.

- e) Click **Assign** and **Close**
- f) Then click **Next Record** in the upper right corner to fix the next Default Contact.
If the **Next Record** link is gray, you've fixed them all.

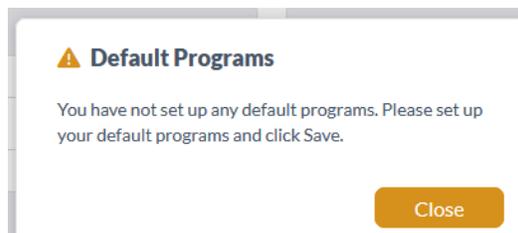
Can I be alerted when there are Default Contacts to fix?

- Click the flag in the upper right corner and choose **Fix Default Contacts**.
- Click the **Actions** button and choose **Notification**
- Create a schedule for when you want to receive the notification to fix Default Contacts.
 - As batches come in:** Put a dot next to **Daily/Weekly** and select all weekdays.
 - Weekly:** Put a dot next to **Daily/Weekly** and a check that day.
 - Monthly:** Put a dot next to **Monthly** and choose a **Week** and **Day** from the drops.
- Type the subject: **MP alert: Fix Default Contacts**
- Click **Save**.

Finalizing your MP e-giving batch

Batches will be auto-created for you every business day (not Saturday, Sunday or bank holidays). There may be a delay - as in today's batch may include donations from yesterday or the day before but it would not be unusual to see a daily batch. You don't have to process the batches as they come in. For example, you could designate one day a week to finalize MP e-giving batches.

- Open the **Batch Manager** and open a batch.
- Click **Close** on this error.
- Set **any** program as the **Default program**.
- Edit the **Batch Name** field if you would like and click **Save**.
- Compare the donations/totals to your Vanco paperwork. (Contact support if they don't match.)
- Finalize as you would normally.



Printing Batches & creating the deposit:

Printing contents of batch

- Starting on the view: ***New MP e-giving batches**, check mark the batch you want to print.
- Click the **Reports** button and choose **Selected Batch Listing Erie**.
- Click the **Print** button. Print the entire report or just your preferred pages.



- Click the **X** in the right corner to close the small **Report Selected Batch Listing** window.

Preparing the deposit Note: A deposit can contain multiple batches.

- Click the **X** in the upper right corner of the **Selected Batch Listing Erie** to close the PDF.
- Click the **X** in the right corner to close the small **Report Selected Batch Listing** window.
- Click **Contributions** and choose **Batches**.
- Check mark all batches included in your bank deposit.
- Click the **Tools** button in the upper right corner and choose **Create Deposit**.

10. Complete the New Deposit form.

- a) Name the deposit Sunday ##/##/## or a name of your choosing.
- b) Change the **Deposit Date** to that of the actual bank deposit
- c) Do **not** toggle "One Deposit Per Batch" unless that is your practice.

11. Click **Create Deposit** and click **Close**.

Editing recurring donations to CSA each February

If your parish has set up MP e-giving to include the CSA fund, you may have people who set up recurring donations to last year's CSA. The only way to switch those recurring gifts to this year's CSA is to update each donor's recurring gift one at a time.

These instructions assume you have already added the new CSA fund to MP e-giving and removed the old CSA fund

 **IMPORTANT NOTE:** Put a notice in your Sunday bulletin or email online donors to your CSA fund or both to alert them to the impending change because they will receive an alert after change is made.

Suggested bulletin announcement or email text:

Attention online givers: If you previously set up a recurring gift to **CSA 2025**, that recurring/scheduled gift will update to **CSA 2026** on your behalf. If you would like to discontinue that recurring gift at any time, just let us know—we're happy to help. Thank you for your generosity to CSA 2025! Your support truly strengthens our parish and helps us continue our mission.

Instructions for fixing recurring donations from last year's CSA to this year's CSA.

1. Open MP e-giving backend
2. Click **Main Menu** and choose **Reporting**
3. Choose **Dashboards**
4. Choose **Overview**. You will see a scheduled gifts tab where you can see all recurring givers. If any of those recurring givers are giving to last year's CSA, you should change that to the new CSA fund. If you don't, they will continue paying on their old pledge.
5. To change it from last year's CSA fund to this year's CSA fund
 - a. click the gift
 - b. edit the recurrence
 - c. change the fund to CSA 2026. (Note: The box for the fund shows a drop-down arrow that doesn't drop down. Put your cursor on the word "fund" and chose the new CSA.)

Other Essential Mp E-giving Instructions

Instructions for managing your MP e-Giving account can be found here:

<https://help.acst.com/en/giving/ministryplatform-egiving/guides/manage-your-account>

Editing a donor's profile in MP e-giving

<https://help.acst.com/en/giving/egiving/how-to/profiles/profile-basics/edit-profiles>

Adding a Fund:

<https://help.acst.com/en/giving/egiving/guides/funds>

MP e-giving account is connected to the wrong Contact in MP.

1. Call support so they can assist you with assigning the MP e-giving account to the correct contact.

Merging duplicates: **Check for duplicates regularly.** ([Learn about duplicates here](#))

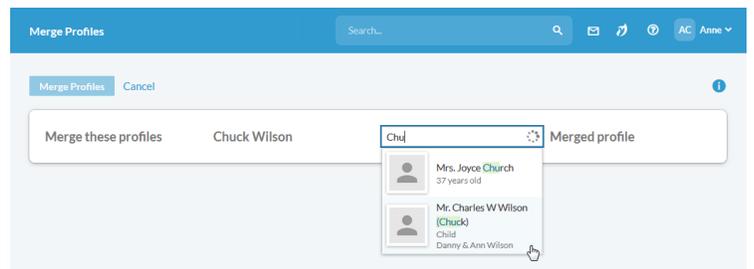
Merging profiles identified as duplicates

1. In the top-left corner, click your site name.
2. Click **Giving** and then **Main Menu**
3. Click **Reporting** and then **Dashboards**.
4. Click the **Overview** tab.
5. In the **Individuals section**, click **Possible Duplicates**. The number of possible duplicates displays beside the link.
6. Click the blue **Resolve** link next to one of the duplicate profiles
7. Continue to step A below.

Merging profiles **NOT** identified as duplicates

The search bar is available in eGiving no matter what screen you're on.

1. Search for one of the profiles you wish to merge.
2. Click the Click  on the profile, and select **Merge Profile**.
3. Enter the name of the potentially duplicate profile in the text field.
4. Continue to step A below.



The profiles display side by side. If one profile has information but the other does not, the selection is made for you. If the information matches for both profiles, the selection is also made automatically.

- A. If there are any rows with a Choose Data arrow  that indicates the system wasn't sure which block to choose. Click a block on one side or the other to select the right chunk of information. The indicator will disappear.

B. b. When all orange indicators are gone, click **Merge Profiles**.

Merge these profiles	Chuck Wilson	Mr. Charles W Wilson (Chuck) X	Merged profile
SYSTEM INFORMATION ⓘ			
Created	Sep 13, 2010	Sep 13, 2010	Sep 13, 2010 Older date will be kept
Source	None	None	None Older source will be kept
Account Status	No account	Has account Last logged in: Jan 25, 2018	Has account Last logged in: Jan 25, 2018
CONTACT INFORMATION			
Name	Mr. Chuck Wilson Chuck Wilson	Mr. Charles W Wilson (Chuck) Chuck Wilson	Choose data
Home Address	None	PO Box 778 Florence, SC 29503	PO Box 778 Florence, SC 29503
Home Phone	None	(843) 555-7988	(843) 555-7988
Parent/Guardian Contacts	None	Ann Wilson Danny Wilson	Selections will be merged
Primary Email	ChuckWilson@example.org	CharlesWilson@example.org	Choose data

How do parishioners change their payment method.

1. Log into onRealm
2. Click their name in the upper right corner
3. Select Payment Methods from the drop down menu

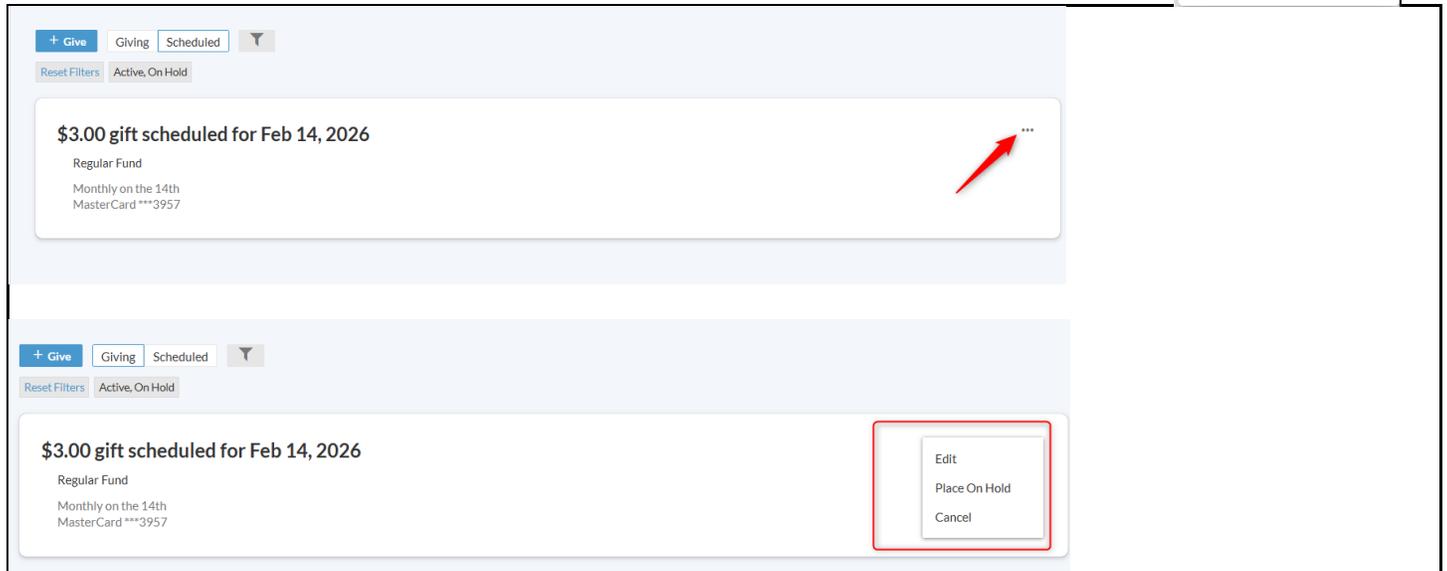
How do parishioners edit a recurring/scheduled gift.

Once they have an account set up through the portal, they can follow these instructions:

1. Log in using the online giving link on your website.
2. Click their name and select **Scheduled Gift** from the drop-down menu.
 - A. Click the three dots next to the gift that needs to be edited
 - B. Choose to edit the gift or cancel it.

Welcome, Petunia ▾

- Giving History
- Scheduled Gifts
- Payment Methods
- Sign Out



They will see a screen like this. All the items that the arrows are pointing to are what the donor can edit. The red area is not editable. If they need to change the schedule (monthly, weekly, etc), they will need to cancel the scheduled gift and create a new scheduled gift.

How much would you like to give?

Amount: \$ **4.00** Fund: Regular Fund ▾

+ Another Fund

GIVE ONCE GIVE MULTIPLE TIMES

EVERY WEEK
 EVERY 2 WEEKS
 EVERY MONTH
 TWICE A MONTH
 EVERY 3 MONTHS
 ANNUALLY

Start date: 3/17/2026 ▾

Stop giving after: Date ▾ End date: /29/2026 ▾ X

SUMMARY	\$4.00 every month	2 gifts scheduled	\$8.00 in total gifts
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They can edit the payment method for the scheduled gift after clicking Continue:

How would you like to give [REDACTED] ?

Contribute an extra \$0.12 per gift to help offset processing costs.

 Keep Original Payment Method

 New Payment Method

Back

Cancel

Save \$4.00



SUMMARY

\$4.00

every month

2

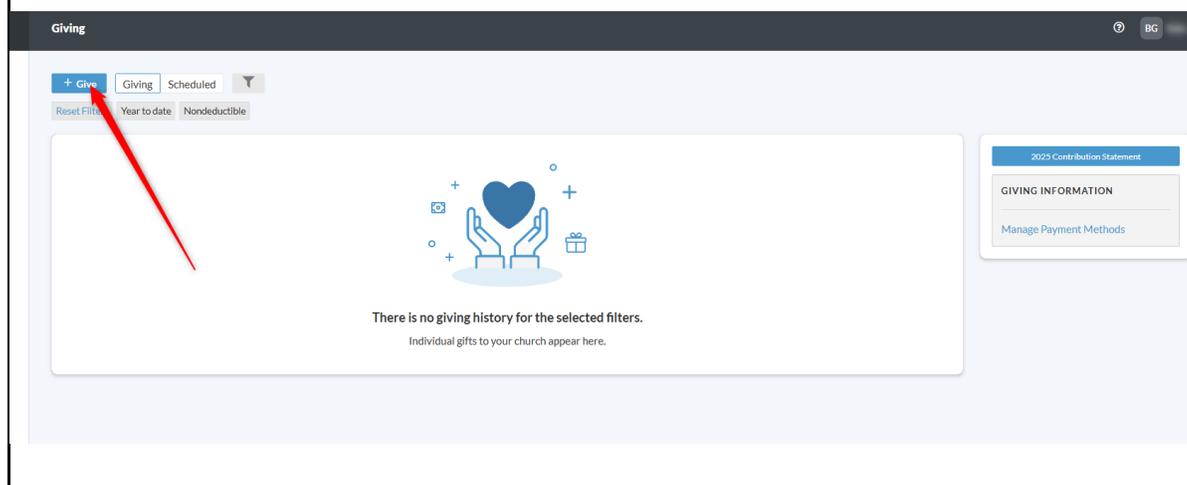
gifts scheduled

\$8.00

in total gifts

To cancel the gift, they will need to click the three dots next to the gift and click cancel. They will be asked to confirm the cancellation of the gift.

To schedule a new gift while they are logged in, they can click on the +Give button:



Troubleshooting issues for your donors.

How to get help for MP e-giving issues:

For yourself: Please contact support through online chat or by calling

For your parishioners: Please do not ask parishioners to contact the Diocese. We do not have access to your MP e-giving accounts. Please contact support on their behalf.

How to help parishioners who can't log in.

Their old Vanco login doesn't work.

Old Vanco login credentials no longer work. Donors must have a Ministry Platform user account to create new donations, to see past donation and manage their recurring

donations. The login they used on Vanco's website does not work. They can create a login by visiting: <https://www.eriecd.org/portal.html> and clicking the blue **Log into our parishioner portal or create an account** link.

Their new MP e-giving login doesn't work

1. Please use the instructions on the previous page to make sure they haven't created a duplicate in the MP e-giving system.
2. Make sure the email address they are using for MP e-giving is the email address you have assigned to their contact in MP.
3. Make sure no one else in the household (spouse or children) has the same email address.
4. Contact Kathy Papalia to see if they have created a duplicate contact in MP (If they created a new user account with an email address that didn't match the one you had on file, it will create a duplicate in MP that only Kathy can resolved.

Why can't parishioners see online giving from before the switch to MP e-giving.

If they see only new giving but not past giving, please direct them to visit the portal and click the **My Statements** button. Donations made prior to your switch to MP e-giving can only be viewed through the My Statements widget. The portal can be found here:

<https://www.eriecd.org/portal.html>. Under the My Statement sbutton they will be able to print End of Year Statements and see all giving to all funds-- cash/check and online.