Revised January 2, 2023



MP e-Giving Integration





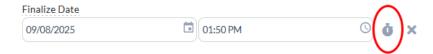
Creating a Notification to alert you when there are MP EGIVING batches to finalize and/or deposit

- A. Click **Contributions** and click **Batches**.
- B. Choose the view *New MP e-giving batches. (It will be at the top of the list)
- C. Click the **Actions** button and choose **Notification**
- D. Create a schedule for when you want to receive the notification to process batches.
 - 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.
- E. Type the subject: MP alert: New MP e-giving batches
- F. Click **Save.**

Batching Vanco payments from MP e-Giving

- 1) If you received a notification email, click on the link in the email to see a list of batches to process If you don't use the notifications, follow steps 1a-1b.
 - a. Click Contributions and choose batches.
 - b. Change to the *New MP e-giving batches view.
- 2) Click on a batch in the list to open it.
- 3) Click the **Donations** tab to see the individual donations.
- 4) Do you see anyone listed with the name **Default Contact**? Yes, follow steps 4a-g. No, skip to step 5.
 - a) Click on the **blue chain link** button for the first *Default Contact donation record in MP so it opens.
 - b) Click the **Tools** button and choose **Assign Donor**.
 - c) Compare the information in the Notes field against the donors in the Possible Match column and select
 the appropriate donor. This will fix this donation but it will not fix future donations.
 Be sure to select the donor associated with your parish if there are duplicates.
 - d) See page 2 for notes on resolving common reasons donations show up as *Default Contact:
 - e) Click the **Assign** button next to the correct donor and click **Save**. This should assign permanently.
 - f) Click Save and then close the
 - g) If there are still Default Contacts to fix, repeat step 5a-5g.

 If there are no more Default Contacts to fix, move onto step 6.
- 5) Compare the donations/totals to your Vanco paperwork. Contact support if they don't match.
- 6) Click the **General** tab.
- 7) Click the **Edit** button.
- 8) Edit the batch name if you would like
- 9) Click the **stop watch** button next to the **Finalize Date** field.



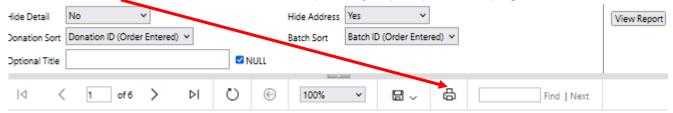
- 10) Click Save.
- 11) Click **Close** and repeat at step 2 above to finalize the next batch if necessary.

Revised January 2, 2023

Printing Batches & creating the deposit:

Printing contents of batch

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



4. 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.

- 1. Check mark all batches included in your bank deposit.
- 2. Click the Tools button in the upper right corner and choose Create Deposit.
- 3. 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.
- 4. Click Create Deposit and click Close.

Revised January 2, 2023

Permanently fixing matching problems.

Example Situation	Suggested Fix
Email address is blank in your contact.	Add the email address using the Add/Edit Family tool.
Email address doesn't match because there is a typo	Fix the typo using the Add/Edit Family tool. People commonly add spaces; forget the @; or the period.
Email address doesn't match because you have a different email in MP contact.	Contact the parishioner to verify which email address to use. If needed, using the Add/Edit Family tool.
No donor record for someone you know to be a parishioner	Click the Create New Donor button at the bottom of the window, verify the information and click Save .
A donor doesn't exist for your parish because he/she is a parishioner elsewhere	People are sometimes generous to other parishes. If the name/address matches, it's OK to select a donor record from another parish. The donation will be applied to YOUR program/fund and you will still be able to produce end-of-year statements. The other parish will not see donations to your parish.
No donor record exists because this donation came from a Guest/Visitor (For example someone who is not now and who may never be registered as a parishioner in the Diocese of Erie.)	You should add the person so you can produce statements when requested: Click the Create New Donor button at the bottom of the window, verify the information and click Save . Later, you'll have to open their contact and make the following changes: Set their Contact Status to Inactive Use the Add/Edit Family too to set their Member Type to Guest/Visitor .

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

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

Adding a Fund in Vanco:

https://help.acst.com/en/giving/ministryplatform-egiving/guides/funds/add-a-fund