



Vanco Integration

Matching donors and Creating Batches



The Vanco integration does its best to match the Vanco donor to a corresponding donor record in Ministry Platform. If the match fails, the donation will be temporarily attributed to the "Default Contact" record in MP.

Finding and fixing a failed match before creating a batch

- 1) Click **Contributions** and choose **Vanco – Unbatched and Default**. On this view you see payments from Vanco which have flowed into MP through the integration.
- 2) Click on the first ***Default Contact** record in MP so it opens. (If you sort the column by the Display name field, *Default Contact records should appear at the top of the list.)

Common reasons for failed match to show up as *Default Contact:

- No donor record
- The donor's Vanco contact information doesn't match the MP contact information. The integration matches on these fields. **First Name, Last Name and Email**. **The integration requires a perfect match.** Example the First name in Vanco is Bill but MP shows William, that will result in a failure to match.

- 3) Click the **Tools** button and choose **Assign Donor**.
- 4) 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. Note: Due to our duplicates, multiple choices may appear. Be sure to select the donor associated with your parish.
- 5) Using the information in the **Notes** field determine what needs to be fixed so future donations will match. Jot this information down and use the examples on page 2 to permanently fix the record so the donation matches properly the next time.
- 6) Click the **Assign** button next to the correct donor and click **Save**.
- 7) Click **Save** and then close the record so you can process the next record.

Creating a batch after all donors have been matched.

- 1) Click **Contributions** and choose **Donations-Vanco**. (Contact IST@eriercd.org if option is missing)
- 2) Put a check mark next to the donations you want to make into a batch. (You could make batches by donation dates, for the entire month or according to your Vanco report.)
- 3) Click the **Tools** button and choose **Create Batch**.
- 4) Choose your congregation from the **Congregation** drop down.
- 5) Enter a name for this batch in the **Batch Name** field.
- 6) Choose **Online Giving** from the **Batch Entry Type** drop down.
- 7) The **Finalize and Deposit** toggle must be blue to create both batch and deposit.
- 8) Enter or select a date from the **Deposit Date** field.
- 9) Click **Create Batch**.
- 10) Click **Deposits** on the left menu and proceed to create the deposit as you would normally.

Correcting Vanco contact information to match MP

- 1) Log into your Vanco account.
- 2) Click the **credit/debit/echeck** tab.
- 3) Click **Add/Edit Member** on the gray bar.
- 4) Search for the member in the **Existing** column.
- 5) Change anything about the name. See notes in the table below pertaining to **email addresses**.

6) Click **save changes**.

Permanently fixing matching problems.

Example Situation	Suggested Fix
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. (Depending on why this donation isn't matching, you may not be able to permanently fix these situations.)
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 .
First name Dan in Vanco and Daniel in MP	Update the Vanco record to Daniel
Email address doesn't match because there is a typo.	Fix the typo. People commonly add spaces; forget the @; or the period.
Email address doesn't match	The donor could have a NEW or secondary email address. Contact the parishioner and ask what email address they'd like to become their primary email in MP. If they want to use the email in MP for Vanco, they will have to update their profile. If they want to use the email in Vanco, use the Add/Edit Family tool in MP to update the email.
The donor record in MP is on the husband's record but the Vanco record was created in the wife's name	Option 1: Update the Vanco record to the husband's first name. Option 2: Create a donor record for the wife. (End-of-year statements will still reflect the total amount given by the family. This option is complicated when there is a CSA pledge as it can cause a duplicate pledge. Option 3: Move the Donor record including all past pledges and donations to the wife. You may need assistance from support to take this step.

Adding a Fund in Vanco (Rough notes. contact **Vanco customer support** at 800-675-7430 with any questions.)

1. Get the Fund ID **from Ministry Platform** by clicking **Church Structure** and choosing **Programs**
2. Log into Vanco
3. Click **Admin and** click your Company Profile
4. Click **Manage Fund**
5. Click **Add**
6. Enter **Fund ID** and **Fund Name**
7. Click **Save**