

IMODULES

The Banner Advancement Connector solution offers clients an easy, secure, and reliable method of quickly synchronizing biographic and Gift data between Encompass and an Ellucian Banner Advancement® database. This integration calls iModules Web services that are used to request or pass updates between two systems.

Pull – Pulling transactions from iModules to Banner

Gift Integration

- One-time gift – supported on Version 8.5.1 (June 2012)
- Scheduled payments – (first payment is taken today) – supported on Version 8.6.1 (June 2013)
- Perpetual gifts (a gift with no end) - supported on Version 8.6.1 (June 2013)
- Giving History (Optional Configuration)
 - Enable Giving history tab in Encompass (basic functionality)
 - OR A list of giving history records provided by Advancement is displayed in the iModules Giving History tab (via Web Services) - update 7/23/14 - currently being developed by Ellucian®

Three basic steps to configure a donation form in Encompass for the Connector integration

1. Create your campaign in iModules
2. Add gift fields to the campaign
3. (Optional) Create designations (Allocations) and add the designations to your campaign form (if needed).
4. Add campaign code(s) to your giving form i.e. Commerce Identifier in Encompass

Creating a campaign

1. Click **Donations > Donations Home > Add New Campaign**
2. Toggle **Advanced Mode**
3. Add **Campaign Name**
4. Check the option to **Enable Designations**. You enable designations at this point if you'd like to have designations on your campaign. You can either create a new designation or use pre existing designations.
5. **Enable Payment Options** – Check to **Enable Scheduled Payments and/or Perpetual Giving**.
6. **Add Commerce Identifier** – Select a commerce identifier from the drop down list. Enter the value for the commerce identifier field. Click **Add**.

Commerce IDs allow you to assign commerce identifier fields to events, campaigns and commerce forms for reporting. These IDs will automatically be pulled in the Event, Campaign, and Commerce form reporting, as well as reconciliation reporting. They can include Revenue Codes, multiple General ledger codes, etc. For example, Commerce Identifier Name = Department, and the Value = 12345 (or “accounting”, however you track it internally)

NOTE: The Commerce identifiers for your system must be set up by iModules. Please contact Application support for assistance.

Adding fields to your campaign form



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Add Connector supported fields to the campaign form. **These fields should be created as reusable instance fields.**

The list below contains fields that can be added to the form.

Export Column Header Name	Friendly Name	Field Type
matching_gift_company	Matching Gift Company	Text Box
Class Code 1	Tribute type (e.g., In honor of, In memory of)	Drop Down List
Class code 2	Tribute type (e.g., In honor of, In memory of)	Drop Down list
Class Code 3	Tribute type (e.g., In honor of, In memory of)	Drop Down list
Processing_Instructions	Gift processing instructions provided by the donor	Text Area(2000 char limit)
Gift Comment	Any comments related to your tribute?	Text Area (300 Char limit)

Create a reusable instance field

1. Add the **Field Name** and **Display Name**
2. Click **Show Advanced Options**. Rename **Export Column Header Name** to match the field name in your Banner Advancement system. This field name is synced by the connector and is the field that you will see in report.
3. Select the **Data Field Type** from the dropdown.
4. **Data Storage Mode:** Select **Reusable Instanced** field. This functionality that allows a data field to be re-used within the same form type.
5. Click **Next** to complete and save the new field:

For a **Matching Gift field**, use a **Data Field Type** of **Gift Matching**.

Add designations (Allocations) to a giving form

Designations can be added at two points:

- When creating a new campaign - Check **Enable Designations** to select designations to be added to the donations (giving) form.
- OR by Editing an existing campaign

For Banner Connector designations, ensure the Designation ID is named Banner Designation Code – a case sensitive value - then add the corresponding value e.g. 'KC'.



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Designations - Add / Edit Designation

Name: *

External Database Value: *

Description:

Designation IDs:

Summary client tasks

1. Review all Advance gift sync documentation
2. Create giving forms
3. Configure the gift custom fields in the Connector module in Advance as well as in iModules
4. Create designations
5. Provide Commerce IDs for iModules to configure
6. Test gift Pull

Best Practices

Authenticated/Unauthenticated Gifts

- Best practice is to use Identity Checkpoint in iModules
- If a Donor is an unauthenticated user (user is not logged in) – if an email address matches on the iModules system, the record will appear on the Identity Checkpoint page where you can merge the non-member record with the appropriate ID Number. If the email address of the unauthenticated donor doesn't match our system, a dummy ID will be assigned to the gift transaction; the Donation admin will investigate to see if the donor already exists in Banner Advancement. If a match is found, the transaction will be linked to the Entity ID, if a match is not found, then a new entity record needs to be created for the donor in Banner Advancement.
- If a Donor is an authenticated user (the user has logged in) – then the entity ID # can easily be identified between Banner Advancement and iModules, and brought into an Advancement Web gift Batch; unfortunately, most donors do not log on to make the gift.

