

IMODULES

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

Pull = Pulling transactions from iModules to Advance

Gift Integration

- One-time gifts - supported on Version 9.8.1.1 or higher
- Scheduled payments – supported on Version 9.9.0 (Dec 2013)
- Perpetual gifts (a gift with no end)- supported on Version 9.9.0(Dec 2013)
- Giving History (optional configuration)
 - Enable Giving history tab in Encompass (basic functionality)
 - OR A list of giving history records provided by Advance web is displayed in the iModules Giving History tab (via Web Services)

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 form
3. (Optional)Create designations (allocations) and add the designations to your giving form.
4. (Optional)Add campaign codes 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 (Commerce ID) 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.*

Detailed information located iModules Online Help site > Home > Donations > Create a Donations Campaign



Adding gift fields to your giving form

Baseline mapping entries below are required by each Encompass Campaign and are automatically added to every gift profile created in Encompass and Advance:

| Export Column Header Name | Friendly Name | Field Type |
|---------------------------|---------------|--|
| First_Name | First Name | Text Box (25 char limit) |
| Last_Name | Last Name | Text Box (25 char limit) |
| Email_address | Email | Email TextBox Confirm (320 char limit) |

Optional fields in Encompass do not require mapping entries in the Advance Gift Mapping Entries application. If they exist in the transaction from Encompass, Advance will map them to the appropriate columns in the gift entry record.

| Export Column Header Name | Friendly Name | Field Type |
|---------------------------|--|-------------------------------|
| Designation Text | Displays Allocation name on gift with single or multiple allocations (iModules help site: how to add designations to a campaign) | Display Only (200 char limit) |
| Designation Amount | Displays Allocation amounts on gift with multiple allocations. Amounts can be changed in Encompass by modifying percentages. | Display Only (14 char limit) |
| appealcode | This field is not displayed to the donor (iModules Help site: how to add an appeal code to a campaign) | 15 char limit |

Add these optional Connector supported fields to the campaign form except for Donation Amount**, which is added to the Encompass campaign form when a new campaign is created. **These fields should be created as reusable instance fields.**



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

| Export Column Header Name | Friendly Name | Field Type |
|---------------------------|---|---------------------------------|
| Donation Amount | Gift Amount | Text Box (8 char limit) |
| Designation Text | Displays Allocation name on gift with single or multiple allocations | Display Only (200 char limit) |
| Designation Amount | Displays Allocation amounts on gift with multiple allocations. Amounts can be changed in Encompass by modifying percentages. | Display Only (14 char limit) |
| Joint_Donor_Name | This is a joint gift with my spouse. | Text Box (100 char limit) |
| Tribute_Type | Tribute type, e.g. In honor of, In memory of | Drop Down List (100 char limit) |
| Tribute_Full_Name | Person's full name (donation in honor of James Smith) | Text Box (100 char limit) |
| Tribute_Notification_Name | Notification Name (may be different from name of donor) | Text Box (100 char limit) |
| Tribute_Occasion | Occasion | Text Box (100 char limit) |
| Tribute_comments | Any comments related to your tribute? | Text Area (4000 char limit) |
| matching_gift_company | Matching Gift Company (can utilize Encompass HEP functionality) | Text Box (255 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 Advance 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 the **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

Encompass does not require a campaign to have a designation (allocation). But, if you add one or more designation to a campaign, you do not have to add mapping entries for them in Advance's Gift Mapping Entries application. The designation(s) will be mapped by Advance to the appropriate gift entry fields. If you decide not to specify one or more designations on the Encompass Campaign form, you must populate System Option 359 (Allocation Default).

Note

Designations must either be established in Encompass or System Option 359 (Allocation Default) must be set. Allocations are required for Advance gift entries.

Add Campaign Code (Encompass Commerce Identifier) to a giving form

Encompass does not require campaigns to have an Advance Campaign Code specified. If you want your gift transactions from Encompass to be associated with an Advance Campaign Code, you may add the code to the Encompass Campaign. You do not have to add a mapping entry for it in Advance's Gift Mapping Entries form, because the code will be mapped to the campaign code field in the gift entry. Optionally, if you do not want to specify a campaign code in Encompass, you may set a default campaign with System Option 351 (Giving Options Campaign).

Note:

Campaign Code is not a required field for an Advance gift entry. Unlike allocations, the gift entry can be processed successfully without this code.

Note:

If you want transactions coming in from Encompass to be associated with an Advance Campaign Code, you must set the Encompass Commerce Identifier of Advance Ledger ID to equal the Advance Campaign Code. This field is seen when you edit a campaign in Encompass. Below is an example, where MIL is an Advance campaign code from an Advance test environment

| | Name | Value | |
|--------------------------|-----------------------|-------|--------|
| Add Commerce Identifier: | Advance Ledger ID | | Add |
| Commerce Identifiers: | Advance Ledger ID=MIL | | Remove |



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

Giving History Displayed in Encompass (Web Services)

A list of giving history records provided by Advance Web is displayed in the Encompass Giving History tab. Transactions to allocations will only display in Encompass if the 'Use for AWC Ind' check box is set on the Allocation application. Transactions to allocations without this check box checked will not appear in Encompass.

The information displayed in Giving History is currently from two following existing database packages, which cannot be customized because changes could affect other parts of the application:

- adv_wc401.detail_giving_totals_by_id - (Provides summary data)
- adv_wc401.list_giving_by_id – (Provides detailed rows)

Note:

To enable this check box for an Allocation, use Go To to access the Allocation application for the allocation you wish to display in Encompass and check the 'Use for AWC Ind' check box. Note

Please coordinate with your iModules representative to configure an Encompass form to display giving history from Advance. The form has to call the Advance Web Service for giving history to display.

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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 Advance. 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 Advance.
- If a Donor is an authenticated user (the user has logged in) – then the entity ID # can easily be identified between Advance Web and iModules, and brought into an Advance Web gift Batch; unfortunately, most donors do no log on to make the gift.

