

Welcome

Rock is developed on a clear set of objectives. These objectives cover the craftsmanship we want to bring to the product as well as the flexibility we want to achieve through open-source freedom. They also define what the product will do, which by default, defines what it won't do. Here's what Rock is all about: we seek to improve relationships through quality software and processes. This means that if a tool or process makes a difference to your organization's guest, then we want to work hard to help you achieve success. However, this also means that, while there are a great many important back-office needs for your organization, they won't fit squarely into our charter, at least not at this time.

Sounds complicated, but here's the bottom line: while a full back-office accounting system is important to every organization, it's not something that fits into our stated mission. Keep in mind that we're a small team of developers pouring our time and effort into creating a crafted Relationship Management System. In the famous, albeit translated words of Michael Porter, "We can't be all products to all people." We do work with a number of partners who offer tools you can use to build your accounting system. Some of the tools work with Rock. Some replace Rock. When using these tools, it's important to work with the partner to create a finance structure that works for your organization.

So, if you're wondering, "Will Rock replace my accounting system?" the answer is no. That said, Rock does have some key features that organizational accounting teams will love. These features center around donor management since this is a major touch point with your guests. Let's take a look at what's possible.

It Goes Beyond Gifts:

While we describe many of Rock's financial tools in terms of *giving* or *donations* keep in mind they are simply financial transactions. If your organization works around the concept of *dues* or *payments*, you can use these same tools. We've worked hard to make these tools be as reusable and multi-purpose as possible.

Financial Components

Before diving into the tools, let's look at the basic financial components of Rock. To do this, we'll step through the components, starting with the person. Again, it's important to note that while we use a scenario of *donations*, these transactions could just as easily be *dues* or other forms of payments.

Transactions

Like everything in Rock, it all starts with people. People make financial transactions with your organization through gifts, donations, subscriptions or dues. These transactions can be simple (like money given to a single purpose) or they can be more complex (perhaps a single transaction covers multiple purposes). To be able to handle multiple purposes, transactions have one or more detail records to hold the information for each purpose.

In our example below, Ted has given \$110 dollars to Rock Solid Church. One hundred of these dollars are designated for the General Fund account with the remaining ten dollars going to the Building Fund account.

Transactions



Financial Transaction

Ted Decker
Date: 12/1 **Total Amount:** \$110

Transaction Details

General Fund	\$100
Building Fund	\$10

Batches

Transactions that occur in a similar date range are grouped together into batches. These batches help organize the transactions. They also play a key role in integrating to your General Ledger account system. Instead of re-entering every transaction into your General Ledger, you can enter the batch totals knowing that Rock will keep the historical details for you to reference later if you need them.

In our example below a batch has been created for the weekly gifts for the Rock Solid Church.

Batches

Financial Batch

 Financial Transaction Ted Decker Date: 12/1 Total Amount: \$110 Transaction Details General Fund \$100 Building Fund \$10	 Financial Transaction Pete Foster Date: 12/3 Total Amount: \$250 Transaction Details General Fund \$200 Building Fund \$50	 Financial Transaction Alisha Marble Date: 12/4 Total Amount: \$125 Transaction Details General Fund \$100 Building Fund \$25	 Financial Transaction Pete Foster Date: 1/1 Total Amount: \$150 Transaction Details General Fund \$100 Building Fund \$50	 Financial Transaction Alisha Marble Date: 1/1 Total Amount: \$125 Transaction Details General Fund \$100 Building Fund \$25	 Financial Transaction Pete Foster Date: 1/1 Total Amount: \$150 Transaction Details General Fund \$100 Building Fund \$50	 Financial Transaction Alisha Marble Date: 1/1 Total Amount: \$125 Transaction Details General Fund \$100 Building Fund \$25	 Financial Transaction Pete Foster Date: 1/1 Total Amount: \$150 Transaction Details General Fund \$100 Building Fund \$50	 Financial Transaction Alisha Marble Date: 1/1 Total Amount: \$125 Transaction Details General Fund \$100 Building Fund \$25	 Financial Transaction Pete Foster Date: 1/1 Total Amount: \$150 Transaction Details General Fund \$100 Building Fund \$50	 Financial Transaction Alisha Marble Date: 1/1 Total Amount: \$125 Transaction Details General Fund \$100 Building Fund \$25
---	--	--	--	--	--	--	--	--	--	---

Accounts

Accounts determine what a transaction is for. In our examples above, both the *General Fund* and the *Building Fund* are accounts. These accounts usually correspond with accounts you create in your accounting system.

Pledges

While most of Rock's financial tools are designed to be multi-purpose, the concept of pledges is closely tied to the nonprofit world of donations. Pledges allows your members and guests to commit to an amount that they will be giving over a stated period of time.

Batches

As we mentioned earlier, batches are a way of grouping financial transactions. Grouping transactions allows you to better integrate with your General Ledger software. You will only need to move over the batch totals instead of each financial transaction.

Characteristics of Batches

Before we dive into looking at the screens that make up batches let's first review the characteristics of batches.

Item	Description
Name	The name is used as a basic descriptor of the batch. You can come up with any naming convention you want.
Transaction Total	The sum amount of all the transactions in the batch.
Control Amount	When dealing with manually entered transactions, it's common to first do a manual count of the transaction totals by hand. This number is then entered into the <i>Control Amount</i> column to be used as a double-check since transactions are individually entered into the system. When you're done entering your transactions, the batch's <i>Transaction Total</i> should equal the <i>Control Amount</i> .
Status	Batches can have one of three different statuses: <ul style="list-style-type: none">● Open: This means that the batch is editable. The details of the batch can be changed and transactions can be modified.● Closed: The batch is done and should not be edited. Once you close the batch you should then move its total into your general ledger.● Pending: This is a special status used by the check-scanning software. When a batch is in a state of <i>Pending</i>, it means that transactions are still being scanned into the batch.
Start / End Dates	These dates provide a date range for the transactions that they contain.
Account Code	When you enter the batch total into your General Ledger there will more than likely be a transaction id generated by that system. This field allows you to enter that identifier.

Working With Batches

Batches can be viewed under `Finance > Batches`. Below is a figure showing the batch list screen with the various filters that are available.

Batch List

Filter Options ^

Status: Open (1)

Date Range: [] to []

Campus: []

Contains Transaction Type: []

Title: []

Apply Filter Clear Filter

<input type="checkbox"/>	Id	Date	Title	Transaction Count	Transaction Total	Variance	Accounts	Campus	Status	Note
<input type="checkbox"/>	411	6/11/2017	SampleData1497153600000	2	\$198.00	\$0.00	General Fund: \$148.00 Mission Fund: \$50.00		Open	<input type="checkbox"/>
<input type="checkbox"/>	318	6/6/2017	SampleData1496721600000	1	\$312.00	\$0.00	General Fund: \$183.00 Building Fund: \$129.00		Open	<input type="checkbox"/>
<input type="checkbox"/>	410	6/4/2017	SampleData1496548800000	1	\$45.00	\$0.00	General Fund: \$45.00		Open	<input type="checkbox"/>

50 500 5,000 3 Batches

-- Select Action -- (3)

4 Total Results

General Fund	\$376.00
Building Fund	\$129.00
Mission Fund	\$50.00
Total:	\$555.00

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1 Filters

The following filters help narrow the batches that are displayed on the list.

2 Batches

The filtered list of batches with relevant fields.

3 Actions

Clicking the checkbox next to batches and then selecting an action allows you to quickly open or close several batches at once.

4 Totals

At the bottom of the grid you will see total numbers by account for the batches based on the filters you provide.

Batch Detail

Financial Batch Detail
 Home > Batches > SampleData149715360000

SampleData149715360000 Batch #411 Open

1 Date Range
 6/11/2017 12:00 AM to 6/11/2017 12:00 AM

2 Transaction / Control / Variance
 \$198.00 / \$198.00 / \$0.00

3 Accounting Code
 1254

4 Account Totals

General Fund	\$148.00
Mission Fund	\$50.00

5 Currency Totals

Check	\$198.00
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6 Match Transactions **7 Audit Log**

8 Transactions

Person	Date / Time	Amount	Currency Type	Transaction Code	Accounts	Summary
<input type="checkbox"/> Lowe, Trish	6/11/2017 12:00:00 AM	\$45.00	Check		General Fund: \$45.00	<input type="checkbox"/>
<input type="checkbox"/> Marble, Bill	6/11/2017 12:00:00 AM	\$153.00	Check		General Fund: \$103.00 Mission Fund: \$50.00	<input type="checkbox"/>

50 500 5,000 2 Transactions

-- Move Transactions To Batch --

9 Total Results

General Fund	\$148.00
Mission Fund	\$50.00
Total:	\$198.00

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- 1 Date Range**
The date range of the batch.
- 2 Amounts**
The transaction total, control amount and variance between the two.
- 3 Accounting Code**
This is used to store an optional reference number to the organization's primary accounting system.
- * Batch Attribute**
Any additional batch attributes you create will be displayed here if they are set to show in the grid. For more information, see the Financial Batch Attributes note below.
- 4 Account Totals**
This list shows account totals for the accounts that the transactions are tied to.
- 5 Currency Totals**
This list shows account totals for each currency type.

6 Match Transactions

Batches that have been created by the transaction scanner need to have each transaction linked to an individual. This button takes you to the screen that assists with this process.

7 Audit Log

This button will take you to an audit screen that shows each change made to a batch or transaction in a batch.

8 Transaction List

A list of the transactions contained in the batch. Clicking on one of these transactions will take you to the details screen.

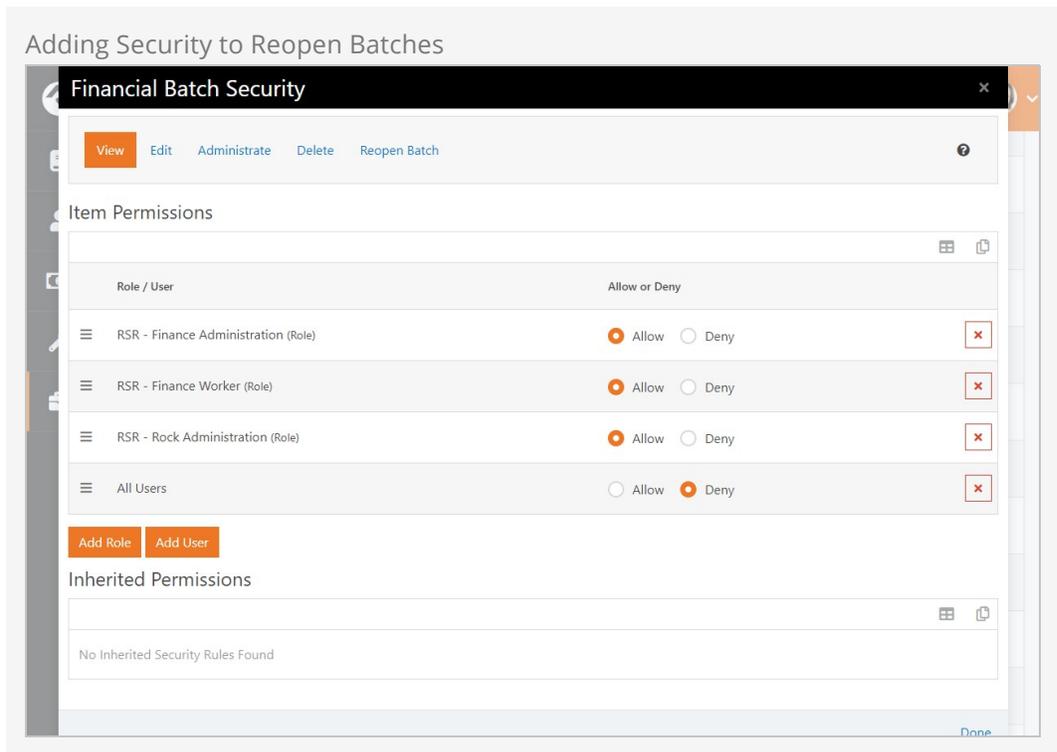
9 Add Transaction

Assuming the batch is not closed, you can add new transactions to the batch.

Financial Batch Attributes

Say you want to assign batches specific project codes, accounting codes, or another specific value. You can easily do this by creating an entity attribute with a Financial Batch entity type. Attributes are created in the *Entity Attributes* screen, located at [Admin Tools > System Settings > Entity Attributes](#). When you choose the *Show in Grid* option, the attribute values will be displayed in the *Batch Detail* screen. To learn more about Entity Attributes, see the System Settings chapter of the [Admin Hero Guide](#).

There may be times when a closed batch needs to be reopened in order to make changes. Because reopening a batch can cause hiccups between your system and your financial clearing house, you only want people with a certain level of security to be able to perform this action. This security role is added and modified at the Entity level.



To give a person the ability to reopen closed batches, follow these steps:

1. Go to `Admin Tools > Security > Entity Admin`.
2. Click *Entity Administration*.
3. In the *Entity List*, locate "Rock.Model.FinancialBatch".
4. Click  to open to the *Financial Batch Security* window.
5. Click the `Reopen Batch` button.
6. Add roles and users to the *Item Permissions*, selecting whether to allow or deny each the ability to perform the action.
7. Click `Done`.

Once the security permission is set, you can reopen a batch simply by selecting the batch you want to reopen, clicking the `Edit` button to open the *Edit Financial Batch* screen, and choosing "Open" from the *Status* dropdown menu. Click `Save` when you're done.

Adding Security to Reopen Batches

Financial Batch Detail
Home > Batches > SampleData1497153600000

Edit Financial Batch Batch #411 Open

Name *
SampleData1497153600000

Control Amount
\$ 198.00

Status *
Open

Campus

Batch Start *
6/11/2017 12:00 AM

Batch End
6/11/2017 12:00 AM

Accounting Code
1254

Notes

[Save](#) [Cancel](#)

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Automated Batches Created by Third Party Systems

Third party systems can create automated batches using the "IsAutomated" feature. These batches have an additional "Automated" label. While the transactions of an automated batch are downloading, the batch will have a "Pending" status. To prevent processing errors, this status cannot be changed until the download is complete. Once all of the transactions are downloaded, the status will automatically change to "Open" and the batch can be processed.

Automated Batch

Financial Batch Detail
Home > Batches > Fundraising Donations Credit Card

Fundraising Donations Credit Card Batch #54 Pending Automated

Date Range
8/6/2018 12:00 AM to 8/6/2018 12:00 AM

Transaction / Control / Variance
\$375.00 / \$375.00 / \$0.00

Account Totals

Building Fund	\$140.00
General Fund	\$235.00

Currency Totals

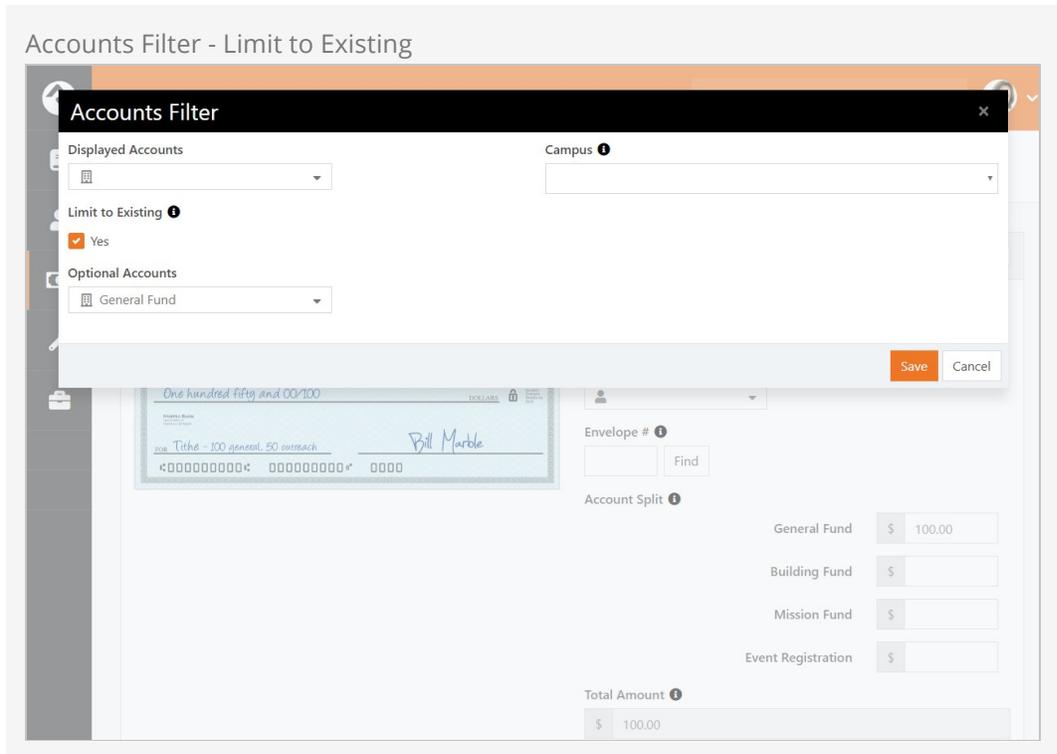
Check	\$375.00
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[Edit](#) [Match Transactions](#) [Audit Log](#)

Transactions Transactions Transaction Details Options

Transactions Created Using Teller Import

Transactions created using Teller Import have contribution amounts and associated accounts but no contributor name. Obviously this can make matching transactions with givers difficult when processing batches. Selecting the "Limit to Existing" option in the *Transaction Matching Accounts Filter* screen allows you to display only accounts associated with that particular Teller Import file. To access the *Accounts Filter* screen, click the  button in the *Transaction Matching* screen.



It's important that all modifications to financial transactions are audited. Below is the audit log screen for a batch. It shows all changes to a batch and the transactions in the batch.

Home > Batches > SampleData1497153600000 > Audit Log

Audit Log

SampleData1497153600000 (ID:411)

Filter Options

Category	Who	Did	What	When
Transaction	Alisha Admin	Modified Transaction ID:1666 value from to	Modified Transaction ID:1666 value from to	7 Days Ago
Transaction	Alisha Admin	Modified Transaction Id:1666 value from to		7 Days Ago
Transaction	Alisha Admin	Modified Transaction ID:1665 value from to		7 Days Ago
Transaction	Alisha Admin	Modified Transaction Id:1665 value from to		7 Days Ago
Batch	Alisha Admin	Added Accounting System Code value of 1254		7 Days Ago
Batch	Alisha Admin	Modified Status value from Closed to Open		7 Days Ago

50 500 5,000 6 Changes

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Transactions

Transactions represent the actual exchange of currencies for activities like donations, event registrations, or other financial events. Each transaction is made up of one or more detail (or sub) transactions. This allows for giving to more than one account in a single transaction.

Viewing Transactions In Batches

Where you view transactions in Rock will depend on what you're trying to do. If you're interested in transactions in the context of a specific batch, you can view them on the *Batch Detail* screen by selecting a batch from the *Batch List*.

Batch Details

Financial Batch Detail
Home > Batches > SampleData1497153600000

SampleData1497153600000 Batch: #411 Open

Date Range
6/11/2017 12:00 AM to 6/11/2017 12:00 AM

Transaction / Control / Variance
\$-148.00 / \$198.00 / \$-346.00

Accounting Code
1254

Account Totals

General Fund	\$-148.00
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Currency Totals

Check	\$-148.00
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Edit Match Transactions Audit Log

Transactions Transaction Details Options

<input type="checkbox"/>	Person	Date / Time	Amount	Currency Type	Transaction Code	Accounts	Summary
<input type="checkbox"/>	Lowe, Trish	6/11/2017 12:00:00 AM	\$-45.00	Check		General Fund: \$-45.00	✖
<input type="checkbox"/>	Marble, Bill	6/11/2017 12:00:00 AM	\$-103.00	Check		General Fund: \$-103.00	✖

50 500 5,000 2 Transaction Details

-- Move Transactions To Batch --

Total Results

General Fund	\$-148.00
Total:	\$-148.00

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Clicking on one of these transactions will then display the *Transaction Detail* page.

Transaction Detail

Transaction Detail
Home > Batches > SampleData1496721600000 > Transaction Detail

Financial Transaction Batch #318 Contribution

1 Person
Ted Decker
Campus: Main Campus

2 Date/Time
6/6/2017 12:00 AM

3 Batch
SampleData1496721600000

4 Source
On-Site Collection

5 Transaction Code
11222333344445

6 Payment Method
Type: Check

7 Summary
Ted donated \$183.00 to the General Fund and \$129.00 to the Building Fund.

8 Updates
Last Modified by [Alisha Admin](#) on 7/10/2018 at 12:44 PM

[Edit](#)

Addresses
Home Address
11624 N 31st Dr
Phoenix, AZ 85029

Accounts **9**

General Fund	\$183.00
Building Fund	\$129.00
Total	\$312.00

Images **10**

11 Refund **12 Add New Transaction** **13** [Back](#) [Next >](#)

Transaction History

Filter Options ⌵ ⌵ ⌵

Category	Who	Did	What	When
Transaction	Alisha Admin	Added Transaction Code value of 11222333344445 Added Summary value of Ted donated \$183.00 to the General Fund and \$129.00 to the Building Fund. Added Source value of On-Site Collection		1 Second Ago

50 500 5,000 1 Change

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- 1 Person**
Link to the person who initiated and authorized the transaction.
- 2 Date/Time**
This is the date and time that the transaction occurred.
- 3 Batch**
Link to the batch that the transaction belongs to.
- 4 Source**
Where the transaction originated.
- 5 Transaction Code**
This is the transaction code for the item. Most often this transaction code will be generated by an external service like the credit card gateway.
- 6 Currency Type**
The form of payment that was used for the transaction.

- 7 Summary**
Any notes related to the transaction.
- 8 Updates**
Information about who last updated and processed the transaction.
- 9 Accounts**
This is the account split for the transaction that shows the details for each account that was included on the transaction.
- 10 Images**
Any images that are associated with the transaction (e.g. check images).
- 11 Refund**
Selecting the 'Refund' button allows you to reverse the transaction. More details on the refund process are provided below.
- 12 Add Transaction**
If the batch is still open you can add a new transaction. This allows you to quickly enter new transactions without having to go back to the batch detail page.
- 13 Back / Next**
The 'Back' and 'Next' buttons allow you to cycle through the transactions in a batch.

The transaction list on the the *Batch Detail* page has a few extra options.

Transaction List Options

<input type="checkbox"/>	Person	Date / Time	Amount	Currency Type	Transaction Code	Accounts	Summary	
<input type="checkbox"/>	Decker, Ted	6/6/2017 12:00:00 AM	\$183.00	Check	11222333344445	General Fund: \$183.00	Ted donated \$183.00 to the General Fund and \$129.00 to the Building Fund.	<input type="checkbox"/>
<input type="checkbox"/>	Decker, Ted	6/6/2017 12:00:00 AM	\$129.00	Check	11222333344445	Building Fund: \$129.00	Ted donated \$183.00 to the General Fund and \$129.00 to the Building Fund.	<input type="checkbox"/>

50 500 5,000 2 Transaction Details

-- Move Transactions To Batch --

- 1 Options Dropdown**
The upper right corner of the list allows you to show the transaction summary or the transaction images.
- 2 Move Transaction**
If the batch is open you can also move the transaction to a different batch (this batch must also be open.)

Searching For Transactions

When you're searching for a specific transaction, it's often easier to use the transaction filtering capabilities found under `Finance > Transactions`. This screen allows you to provide a set of search options and list transactions that match.

Change In Rock v4.0

Starting in Rock v4.0 all transactions must be tied to a batch. You will no longer be able to create a transaction outside of a batch. This helps provide better auditing and also is a best-practice when using an external accounting package.

🏠
Search

☰
👤
🔍
🔧
📦

Transactions

[Home](#) > [Transactions](#)

Transaction List
Transactions Transaction Details

Filter Options ^

Date Range

 to

Amount Range

 to

Currency Type

Credit Card Type

Transaction Code

Account

Transaction Type

Source Type

Campus (of Batch)

Campus (of Account)

Person

Person	Date / Time	Amount	Currency Type	Transaction Code	Batch Id	Accounts	Summary
Marble, Bill	6/11/2017 12:00:00 AM	\$-103.00	Check		411	General Fund: \$-103.00	
Lowe, Trish	6/11/2017 12:00:00 AM	\$-45.00	Check		411	General Fund: \$-45.00	
Decker, Ted	6/6/2017 12:00:00 AM	\$312.00	Check	11222333344445	318	General Fund: \$183.00 Building Fund: \$129.00	Ted donated \$183.00 to the General Fund and \$129.00 to the Building Fund.
Lowe, Trish	6/4/2017 12:00:00 AM	\$45.00	Check		410	General Fund: \$45.00	
Marble, Bill	5/28/2017 12:00:00 AM	\$153.00	Check		409	General Fund: \$103.00 Mission Fund: \$50.00	
Marble, Bill	11/13/2016 12:00:00 AM	\$152.00	Check		464	General Fund: \$102.00 Mission Fund: \$50.00	

326 Transactions

<

2
3
4
5
6
7
>

Total Results

General Fund	\$31,273.00
Building Fund	\$6,597.00
Mission Fund	\$7,050.00
Total:	\$44,920.00

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Refunding A Transaction

Sometimes you need to rollback a transaction. Selecting the **ReFund** button from the *Transaction Detail* page will allow you to reverse the payment using the modal shown

below.

Payments Edit Panel

Refund

Amount ¹

Reason ²

Summary ³

[Save](#) [Cancel](#)

- 1 Amount**

This tells Rock how much the refund should be for. By default the full amount of the financial transaction is entered into the box.
- 2 Refund Reason**

This dropdown allows you to pick from a standard set of refund reasons. You can modify this list under [Admin Tools > General Settings > Defined Types > Refund Reasons](#)
- 3 Summary**

This field allows you to enter specific notes about the refund.

On-Site Collection

While the number of online transactions is skyrocketing, we shouldn't neglect to mention the tools that support the traditional on-site collection of cash, checks or even credit cards. Below we'll walk through how we process these transactions in the context of weekly giving.

Processing Cash Transactions

Cash transactions come in two formats: anonymous gifts and gifts given by a known person. Let's look at how we tackle each one.

Anonymous Gifts

Typically you'll enter an anonymous user into your database and link all anonymous gifts to this person. When you count up all of the anonymous cash for the weekend, you can add one transaction for this total amount and select the individual *Anonymous*.

Known Gifts

There are a couple of options when processing gifts from known individuals:

1. Manually create transactions for these gifts entering in all the transaction details.
2. If your organization uses a giving envelope, you could also use Rock's check scanner software to scan in the envelopes. Then, you'd then use the *Match Transaction* feature discussed below to process the remainder of the transaction information.

Credit Cards

You can add credit card transactions manually by going to the *Contributions* tab on a person's profile page. Either enter a one-time transaction by clicking the `Add One-Time Gift` button, or you can create a recurring scheduled transaction by clicking the `New Scheduled Transaction` button.

Checks

Checks can be scanned using Rock's check scanning software. More information about setting up and using this software can be found in the next chapter. Once the checks are all scanned, they must be matched to individuals and their amounts entered into the correct accounts. We'll discuss that next in the *Matching Transactions* section below.

Matching Transactions

When you've used the check scanning software to add checks or scanned images of envelopes to a batch you must match them to individuals before you can close the batch. To start this process, open the batch you want to work on under [Finance > Batches](#) and then click the [Match Transactions](#) button.

This will launch a screen to walk you through each check (or envelope) and allow you to tie them to an individual and enter the amounts into the proper accounts.

The screenshot displays the 'Transaction Matching' screen. At the top, there's a progress indicator showing 50% completion. Below this, a check image is shown with the amount \$150.00. To the right of the check, there are several sections: 'Individual' (Bill Marble), 'Assign to New' (Bill Marble), 'Envelope #' (Find), and 'Account Split' (General Fund: \$100.00, Event Registration: \$50.00). The 'Total Amount' is \$150.00. A 'Summary' field is at the bottom. The interface is numbered 1 through 10, corresponding to the legend below.

1 Progress Indicator

2 Add Family:

You may find that the transaction is for someone who is not currently in the system. Using this button will pop up a new window where you can add them.

3 Settings:

Allows you to select which accounts you are entering amounts for.

4 Check Images

5 Individual:

Rock can match a person to the account and routing number of their checking account. If a person already matches the check's account information, you can pick them from the list.

- 6 Assign To New:**
Assigns a new individual to the check's account number.
- 7 Envelope #:**
Allows you to search for an individual by their giving envelope number.
- 8 Person Details:**
The screen will present the currently matched person's address and contact information. This is a great way to not only ensure that you have matched to the current individual but also that their contact information has not changed.
- 9 Account Split:**
Accounts are shown to allow you split the checks total across multiple accounts based on notes in the memo field of the check or outside of the envelope.
- 10 Navigation Buttons:**
Buttons at the bottom of the screen allow you to go to the next record or re-visit a previously completed record.

Saved Check Matching

Once a person is matched to a check via the check's MICR information their name will be displayed in the 'Individual' dropdown shown in item #5 above. You can remove someone from this list by removing the bank account from the *Contributions* tab of their *Person Profile* page.

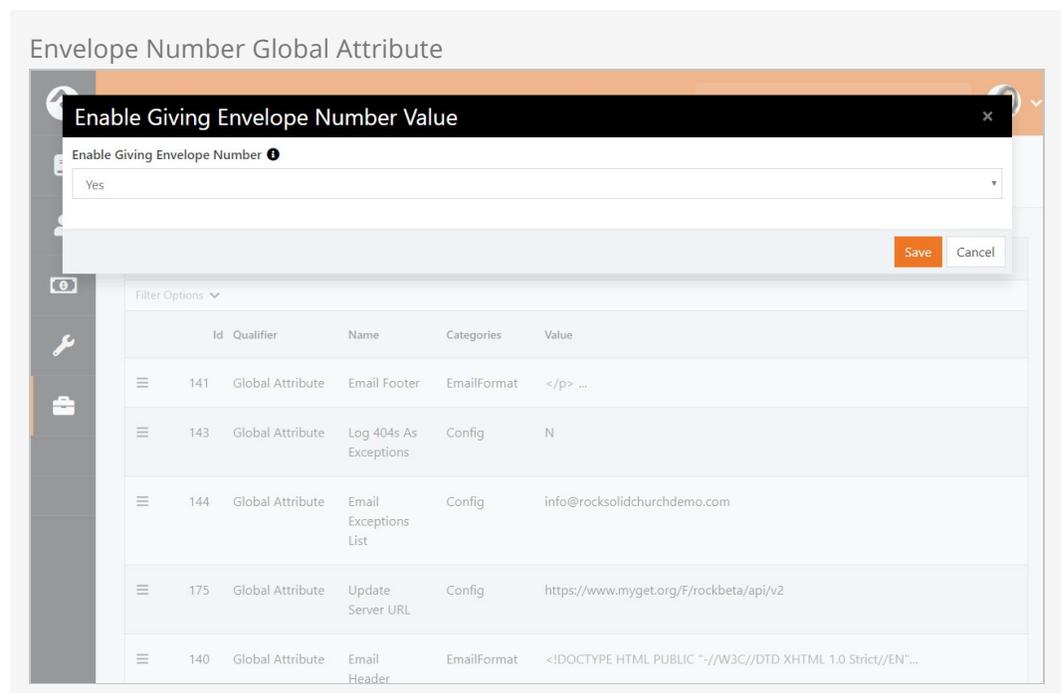
Multiple People Matching At The Same Time

With large batches you might want multiple people to work on matching at the same time. Rock allows this by making sure that each person gets a different record to work on.

Giving Envelopes

Does your church use envelopes for giving? You can use Rock to generate envelope numbers, search for members by envelope number, and use envelope numbers to help with matching transactions. Let's look at how to set up Rock to do this.

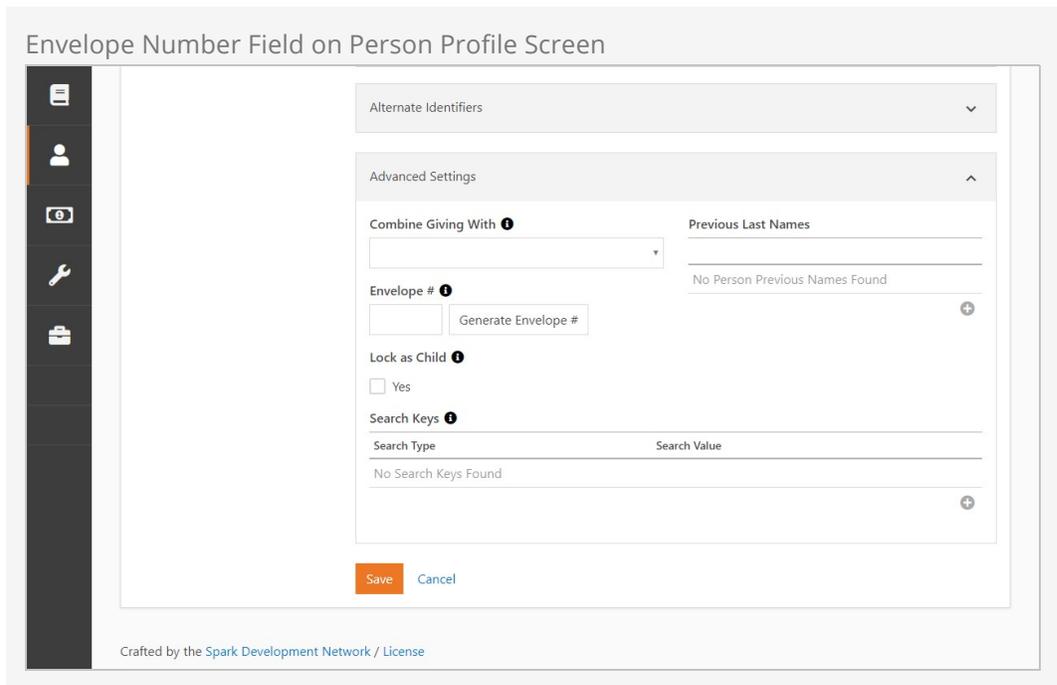
Enabling the Envelope Number Global Attribute



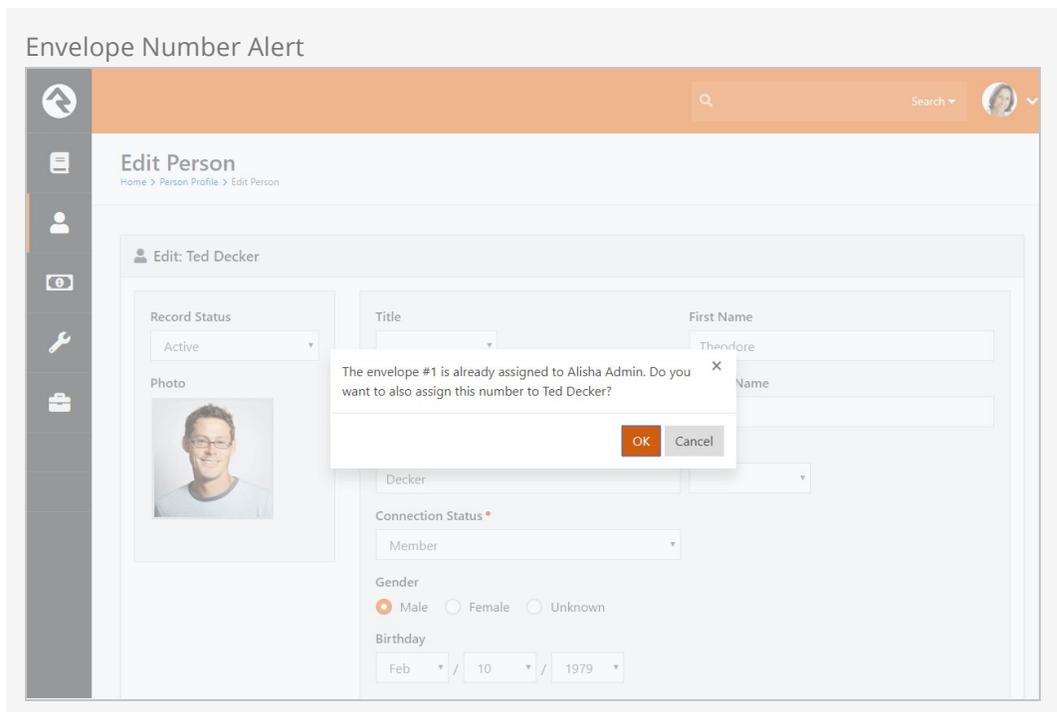
Envelope numbers are a global attribute in Rock, which means switching them in one place makes them available across the system. To turn the envelope numbers option on, go to [Admin Tools > General Settings > Global Attributes](#). Select **Enable Giving Envelope Number** from the attributes list, and choose 'Yes' from the dropdown menu. Click [save](#). Rock is now set to display giving envelope options.

Assigning Envelope Numbers to Members

Envelope numbers are assigned in the Edit Person screen, accessed from the Person Profile. Simply go to a person's profile and click the  button in the bio block.



The envelope number field is located in the Advanced Settings section at the bottom of the Edit Person screen. You can enter a person's existing envelope number into the Envelope # field, or you can allow Rock to assign a new envelope number by clicking the **Generate Envelope #** button. When finished, click **Save**. The envelope number is now associated with that person.

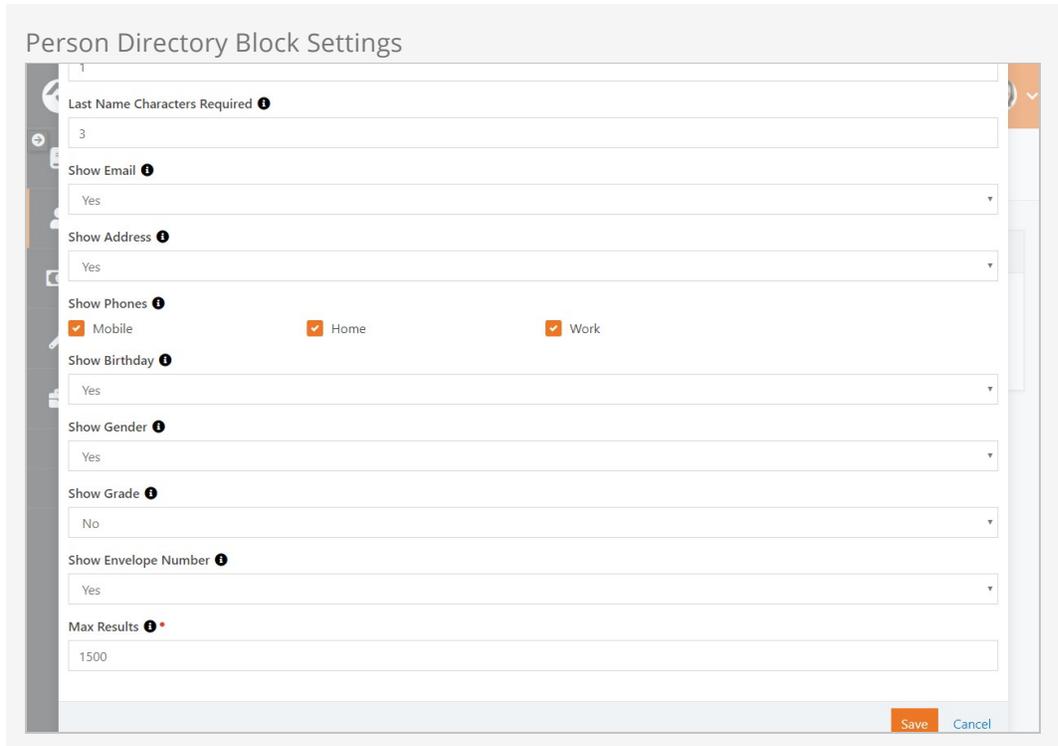


If you enter a number that is already assigned to someone else, Rock will display an alert asking if you also want to proceed. There may be times when you'll want two or more people to have the same number, such as when assigning numbers to multiple

members of the same family. Click to continue.

Searching for Envelope Numbers

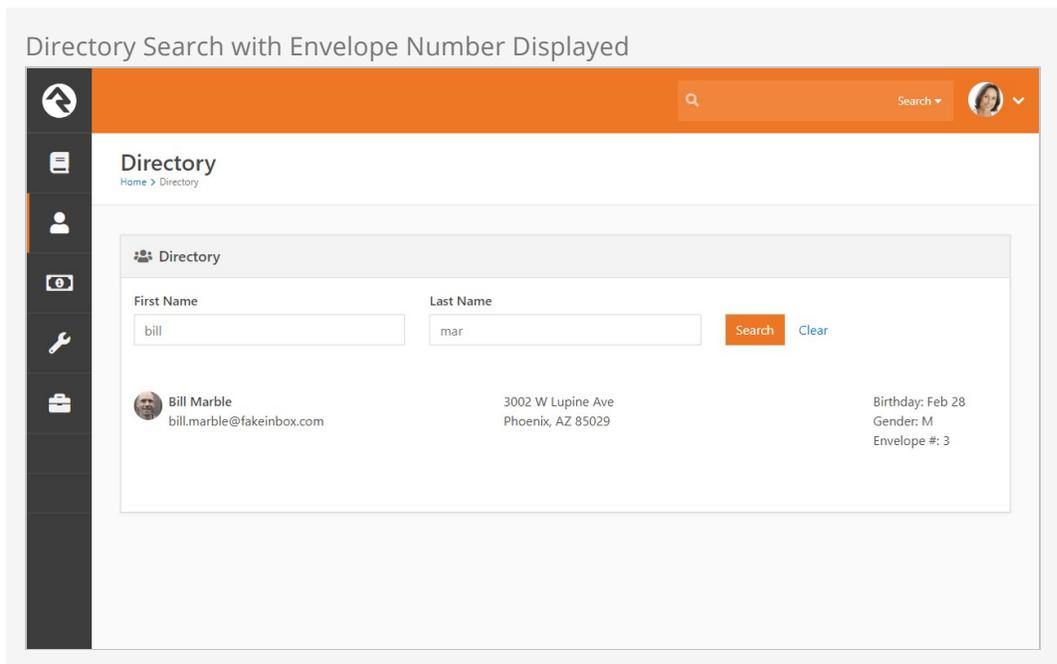
Once envelope numbers have been assigned to members, you can quickly view them using the Directory search function ([People > Directory](#)). To do this, you first need to enable envelope numbers in the Person Directory block settings.



The screenshot shows the 'Person Directory Block Settings' interface. It features a list of settings, each with a dropdown menu or checkboxes. The 'Show Envelope Number' setting is currently set to 'Yes'. Other settings include 'Last Name Characters Required' (3), 'Show Email' (Yes), 'Show Address' (Yes), 'Show Phones' (Mobile, Home, and Work are all checked), 'Show Birthday' (Yes), 'Show Gender' (Yes), 'Show Grade' (No), and 'Max Results' (1500). At the bottom right, there are 'Save' and 'Cancel' buttons.

Setting	Value
Last Name Characters Required	3
Show Email	Yes
Show Address	Yes
Show Phones	<input checked="" type="checkbox"/> Mobile, <input checked="" type="checkbox"/> Home, <input checked="" type="checkbox"/> Work
Show Birthday	Yes
Show Gender	Yes
Show Grade	No
Show Envelope Number	Yes
Max Results	1500

Locate the Show Envelope Number field in the Person Directory block settings, and select 'Yes' from the dropdown menu. Click . Now envelope numbers will be included in the information returned for directory searches.



Keeping this functionality in one search screen, rather than accessing individual profile pages, can save you or your volunteers a lot of time.

Now that you have envelope numbers set up, let's look at how they can be helpful when matching transactions.

Transaction Matching by Envelope Number

When matching transactions, you can search for members by their assigned envelope numbers. Simply enter the envelope number into the Envelope # field and click **Find**.

The name and information of the individual associated with that number will be displayed.

Multiple Envelope Numbers Alert Message

Alert

More than one person is assigned envelope number 3. Please select the individual you wish to use.

Ted Decker

Bill Marble

Select Cancel



1936
Feb 5 2012
Rock Solid Church
\$ 150.00
One hundred fifty and 00/100
Tithe - 100 general, 50 outreach
Bill Marble

Individual **i**

Assign to New **i**

Envelope # **i**

3 Find

Account Split **i**

General Fund	\$ 100.00
Building Fund	\$
Mission Fund	\$
Event Registration	\$

Total Amount **i**

\$ 100.00

Scanning Checks

Rock provides special tools to help automate the scanning of large amounts of checks. Let's take a look at what's available.

Supported Operating Systems

Rock's check scanning software should work with anything greater than Windows 7. It will NOT work with Windows XP.

Installing The Rock Check Scanning Software

Installing the check scanning software is easy. To install, follow the steps below:

1. First install the drivers for the scanner you'll be using. If you're using the Canon CR-series that will be the Ranger software that came with your scanner. In either case, these are simple installs.
2. Download the setup application under `Admin Tools > Power Tools > External Applications > Rock Check Scanner`.
3. Run the setup. The check scanning setup is a breeze with just three quick screens.

Supported Scanners

Rock supports two types of scanners with its scanning tools.

Scanners that Support the Ranger Interface

Rock has integrated with the Ranger Interface API toolset from Silver Bullet Technologies. Technically any check scanner that works with the Ranger API should work with Rock. That said, in the process of developing Rock and testing, we have exclusively used the Canon CR-series of check scanners (specifically the CR-50). While other makes and models should also work, we haven't tested them. Ranger provides a list of supported scanners on their website.

Use The Latest Ranger Driver

In our testing we've noticed that the latest Ranger drivers work better at reading the check's MICR information. Be sure to download the latest driver from your scanner manufacture. For those using the Canon CR-50 try this link.

MagTek MICRImage

Because of the large numbers of these legacy scanners available, we have also integrated and tested with the MagTek MICRImage check scanners. To use the MagTek MICRImage, please install the drivers from <https://www.magtek.com/support/micrimage>. If you're in the market for new scanners, we highly recommend using the Canon CR-series though.

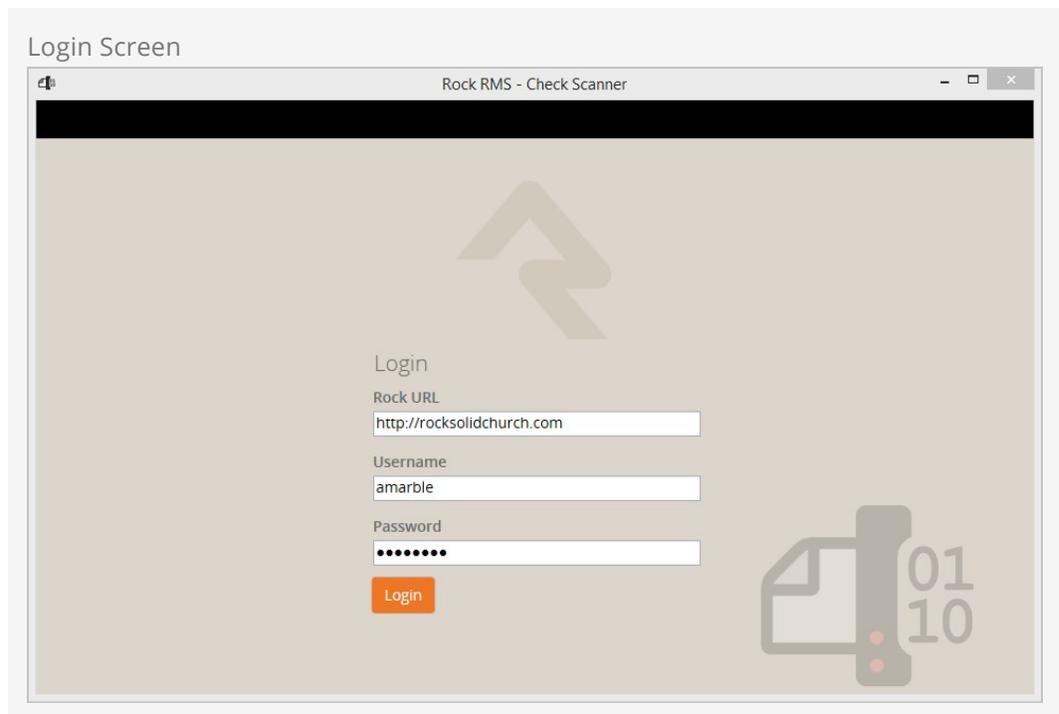
Rock Check Scanning Software

Rock's check scanning software allows you to quickly and easily add checks to transactions in Rock. Let's walk through the process of scanning checks using this software.

First start by launching the software and logging in. Users must be a member of one of the security groups below to log in using this software:

- RSR - Finance Administration
- RSR - Finance Worker
- RSR - Rock Administration

If this is your first time logging in, you'll also be asked for the web address of your Rock server. This is the address that the scanning software will upload checks to.



Software Options

You can change the options used by the scanning software anytime. To do this, select `Options > Tools` from the menu. You will see a screen similar to the one below.

Scan Settings

Options

Scanner Type: Canon CR-50
Interface Version: 4.2.14.2
Feeder Type: Multiple Items

Rock URL

Scanner Interface
Ranger

Scan Image Color Type
Black and White

Transaction Source Type
On-Site Collection

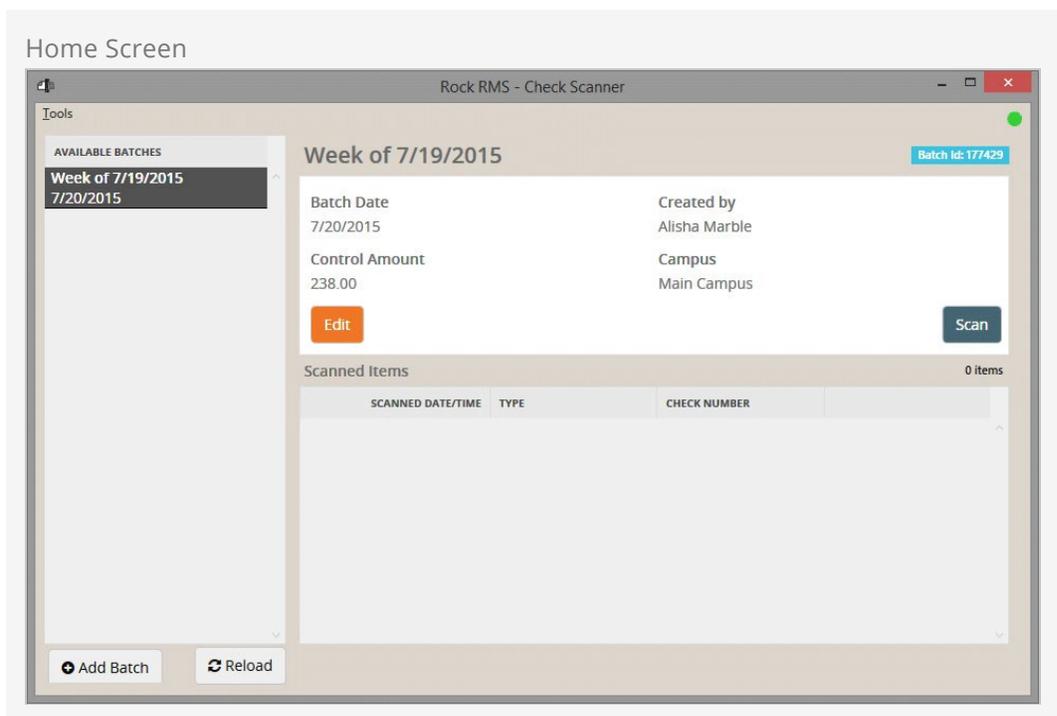
Advanced: Sensitivity and Plurality can be tuned from 1-255. Increase sensitivity and/or lower plurality if you are getting too many bad reads. Normally these can be left blank which will use the default of 128.

Sensitivity
Plurality

Save Cancel

- 1 The scanner that is currently configured.
- 2 **Rock URL**
The Rock server address.
- 3 **Scanner Interface**
The type of interface currently set up (Ranger or MagTek).
- 4 **Scan Image Color Type**
The color depth that should be used when scanning. Options will vary by scanner. The Ranger interface supports black/white, grayscale and color. Just understand that using an option other than black/white will significantly grow the size of your database.
- 5 **MICR Read Sensitivity**
The Ranger driver allows you to adjust the sensitivity of the MICR reading. For the most part you should not need to adjust these settings. Please consult the Ranger and/or scanner documentation for details.

To scan checks, select a batch and click the button.



The next screen lets you select which tender type you'll be scanning into Rock. In most cases you will be scanning checks, but you could also select *Cash* if you wanted to scan the envelopes that the cash transaction came in. When scanning checks, you can determine if you'd like to scan both sides of the check. You can also decide if you would like to enable duplicate document detection. With this enabled, the scanner will determine if two checks are stuck together by looking at the thickness of the paper. Another option for checks is to enable smart scan. This should be enabled if you want to be notified if check account information cannot be read correctly.

Scanner Settings

1

Check

Cash

Credit Card

ACH

Scan Settings

Double-sided

Single-sided

Enable Double Document Detection

Enable Smart Scan

Transaction Source Type

On-Site Collection

Back

Scan

1 Currency Type

Select the currency type you will be scanning. The settings will adjust based on the currency type and scanner driver that you select.

2 Single / Double-sided

Determines if Rock should scan one side or both sides.

3 Enable Duplication Detection

The Ranger driver has the ability to communicate with the scanner to determine when two or more checks were scanned at once. If you're scanning items other than checks (like envelopes) you'll want to ensure this is turned off.

4 Enable Smart Scan

With smart scan turned on the scanner will read the contents of the MICR on the check to ensure that the same check is not scanned more than once.

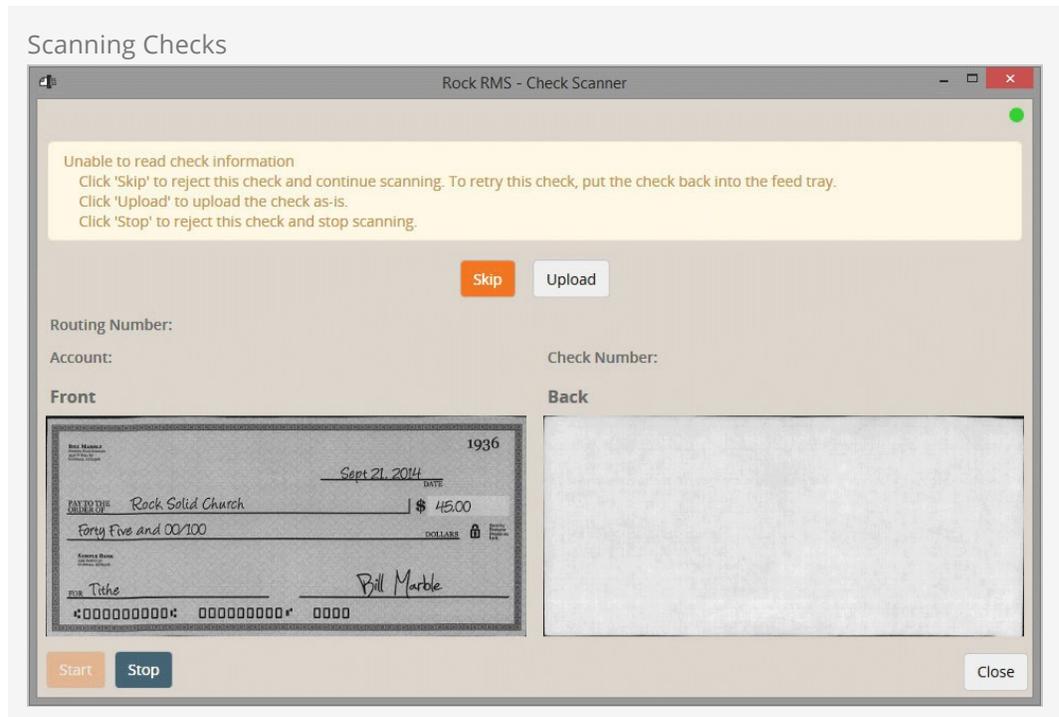
5 Transaction Source Type

This setting allows you to set the transaction source for the scan. This is helpful for times when you'd like to differentiate bank checks that are from the bank's bill pay system from normal personal checks. You'll notice that not all transaction sources are displayed on this list. Only those that are marked as 'Show In Check Scanner' under [Admin Tools > General Settings > Defined Types > Transaction Source](#).

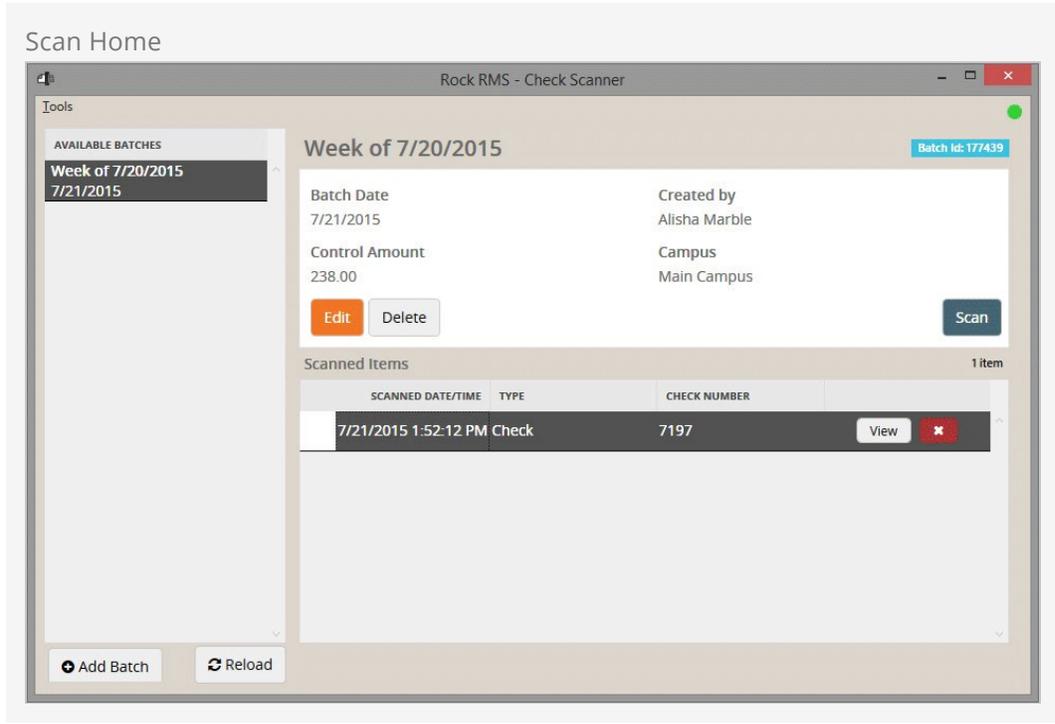
Extra Features:

These double-sided scanning and double document detection are only available on scanners using the Ranger API (see the Supported Scanners section above for more info on scanners that support the Ranger API.)

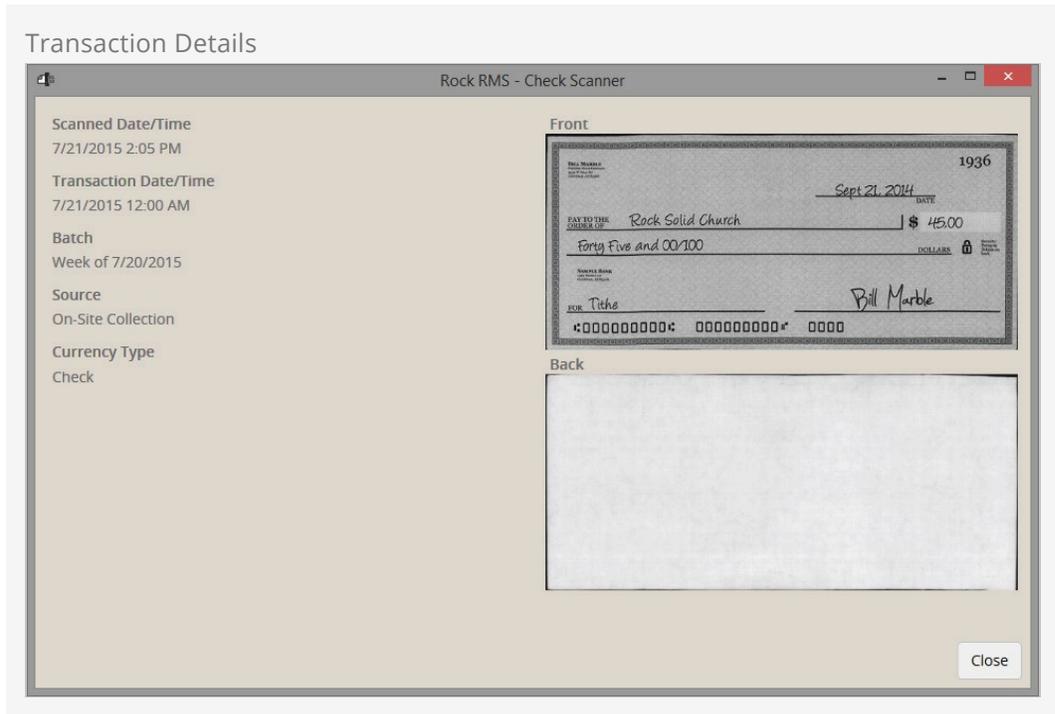
Now the check scanner will start scanning checks. If there is a problem reading one of the checks, it will immediately stop the scanning process and warn you of the error (upside down check, check facing backwards, etc.) From here, you can skip the bad scan and attempt a rescan, upload the scan as-is without the check account information, or stop the scanning process.



Once the scanner finishes with the batch of checks in its hopper, you can add more and scan again. When you're done scanning, press the `Close` button. The main page will show the list of batches and the scanned items. From here, you can add and delete batches, view or delete individual transactions, or start scanning additional items.



When viewing transaction details, you can see the scanned date and time, the transaction date and time (determined by the batch date), and additional details of the transaction.



Dates Associated With Scanning

The Scanned Date/Time that you see in the Scanner Grid is the Date/Time that the scanned item was uploaded. The Transaction Date/Time of each scanned transaction is determined by the Batch Date at the time of the scan. Note that if the Batch Date was changed after some checks were already uploaded, the previously scanned checks would have the old Batch Date and the new scanned checks will have the new Batch Date.

Scheduled Transactions

Some transactions occur once and then they're done. Sometimes your guests will want to set up repeating payments that run on a selected schedule (weekly, monthly, etc.). Rock calls these *Scheduled Transactions*.

Administrating Scheduled Transactions

You can view all of the scheduled transactions in Rock under [Finance > Scheduled Transactions](#).

Scheduled Transactions

Scheduled Transactions
Home > Scheduled Transactions

Scheduled Transaction List

Filter Options

Contributor	Amount	Accounts	Frequency	Created	Starting	Ending	Next Payment	Currency Type	Schedule ID	Active	Last Refreshed
Admin, Alisha	\$100.00	General Fund: \$100.00	Bi-Weekly	7/10/2018	7/11/2018		7/11/2018	Credit Card	P20180710142710532	✓	7/10/2018 2:27 PM

50 500 5,000 1 Scheduled Transaction

From there you can choose a scheduled transaction to edit.

Adding A New Scheduled Transaction:

Scheduled transactions must be entered from the individual's *Person Profile* page. They can also be added by your guests on your external website.

Scheduled Transaction Detail

Scheduled Transaction
Home > Scheduled Transactions > Scheduled Transaction

Scheduled Transaction Details 1 Active

Person Alisha Admin	Amount \$100.00	3 Accounts General Fund \$100.00
Source Website	Frequency Bi-Weekly	4 Change Account Allocation
Payment Method Type: Credit Card Account Number: *****4444 Expires: 02/2023	Start Date 7/11/2018 Next Payment Date 7/11/2018	Created Transaction Bi-Weekly starting 7/11/2018 Credit Card *****4444 General Fund: \$100.00 Online Contribution - Alisha Admin on 7/10/2018 at 2:27 PM
Payment Gateway TestGateway	Last Status Refresh 7/10/2018 2:27 PM Refresh Now	
Transaction Code T20180710142710532		
Schedule Id P20180710142710532		

[Edit](#) [Cancel Schedule](#) [Cancel](#) 5

6 Processed Transactions Transactions Transaction Details

Person	Date / Time	Amount	Currency Type	Transaction Code	Batch Id	Accounts	Summary
No Transactions Found							

Crafted by the Spark Development Network / License

- 1 Status of the schedule (active or inactive).
- 2 Scheduled transaction details.
- 3 History of changes and edits to the scheduled transaction.
- 4 Link to change account allocation. This option is available for open batches only. When clicked, Rock displays the current account allocation and allows you the option to add and delete allocations.
- 5 Button to cancel the scheduled transaction. (Note: Some financial gateways, such as Pay Flow Pro, allow you edit scheduled transactions. In such cases, an `Edit` button is displayed here as well.
- 6 Listing of transactions that have been initiated by the schedule.

Personal Profile

Scheduled transactions can also be viewed on the individual's *Person Profile* page under the *Contributions* tab.

Scheduled Transaction Frequencies

The following options are available as frequency patterns for scheduled transactions. Each payment gateway will support only a subset of these options. Each gateway will also have some special rules for how they calculate the schedules. Notes on these rules can be found at the end of this document under the chapters for each gateway.

- **Weekly:** Every 7 days starting on the start date.
- **Bi-Weekly:** Every 2 weeks starting on the start date.
- **Twice A Month:** Twice a month. Usually this is used with the start date of the first of the month. Payments will then come out on the 1st and 15th of the month.
- **Monthly:** Once a month on that day of the month established by the start date.
- **Quarterly:** Every three months on the same date as the first payment.
- **Twice A Year:** Every six months on the same date as the first payment.
- **Yearly:** Once a year on the same date as the first payment.

Downloading Transactions

There are two ways to configure this download. The first way is to setup a *Download Payments* job to run every night. This can be done under [Admin Tools > System Settings > Jobs Administration](#). This job will run each night (or when you decide you want it to run) and create batches and transactions for new payments.

Don't Forget To Setup The Download Job

It's important to remember to setup the *Download Payments* job if you wish for the transactions to download automatically (highly recommended).

The download job has a few settings that you should review. These include:

1. **Batch Name Prefix:** When the transactions are downloaded from the gateway, they're assigned to a batch. You can configure the names of these batches to all start with a certain prefix.
2. **Days Back:** The number of previous days that the download job should use when querying the gateway for processed transactions. We recommend a value of seven. This allows for times that the job may not run every day. There is no risk in downloading the same transaction on multiple days as Rock keeps track of which transactions have already been added.
3. **Receipt Email:** Each time a new transaction is downloaded for a person, Rock can send them a receipt of that transaction. Use this setting to specify the system email that should be sent when new transactions are downloaded.
4. **Failed Payment Email:** You can send an email notice to specific recipients if a scheduled payment fails. Choose which system email you want to send from the dropdown menu.
5. **Failed Payment Workflow:** You can launch an optional workflow if a scheduled payment fails. Choose the workflow you want to run in this field.

You can also choose to manually download the new payments from the payment processor. You can do this under [Finance > Download Payments](#). This does the same thing as the Rock job but requires you to manually run the download. This block also has

settings that are similar to the job settings for setting the batch prefix and email receipt.

Setting a Payment Reversal Notification Workflow

The Scheduled Job Detail screen also includes an option to trigger a workflow when a scheduled transaction is declined (called a "reversal"). You can configure the workflow to perform any necessary follow-up task, such as sending an automated email. Simply configure the workflow in your General Settings, then select it from the Failed Payment Workflow dropdown menu.

Downloading transactions from the gateway is actually a bit trickier than you might think because of certain edge-cases and advanced features. We'll cover some of these next.

Recent Scheduled Transaction Changes

Consider this example. Ted has a scheduled transaction set that takes \$120 out of his account every week and puts it to the *General Fund* account. Early in the morning the payment gateway creates a new transaction for this amount. Ted arrives to work and changes his giving to \$100 per week. Finally later in the day, the church's *Download Schedule Transaction* job runs and pulls that day's transactions down from the gateway. The gateway's transaction says it's for \$120 but Rock's information only has \$100 allocated. When this happens (certainly a rare edge-case) Rock will apply any extra amount to a *default* account. This default account is the first active account that does not have a parent account and where current date falls between the account's start/end dates.

Naming Batches for Online Giving

The way that Rock calculates the *Batch Name* is by combining a *batch prefix* and a *batch suffix*. The prefix is usually set by a block or job setting (the default value used by the *Transaction Entry* block, *Scheduled Payment Download* block, *Get Scheduled Payments* job etc. is *Online Giving*). The suffix depends on the currency type (*Tender Type Defined Type*). If it is not a credit card transaction then the currency type value is used (e.g. *ACH*). If it is a credit card transaction, then the *Credit Card* type value is used (e.g. Visa, MasterCard, etc). However, the *Credit Card* defined value also has a *Batch Name Suffix* that can be used to override this value. For example, if you want to combine Visa, MasterCard and Discover transactions into the same batch, you can set all three of these defined values *Batch Name Suffix* to the same value (e.g. *VMD*) and then transactions of these types will be combined into the same batch.

Expiring Credit Card Notification

By default a *Send Credit Card Expiration Notices* job is configured to run once a month. This can be found under [Admin Tools > System Settings > Jobs Administration](#). When run, it sends an *Expiring Credit Card Notice* system email ([Admin Tools > Communications > System Emails](#)) to the person whose credit card will expire the following month. If you wish to do additional processing for each expiring scheduled credit card transaction, the job can optionally be configured to launch a custom workflow.

Online Giving

In this fast paced world, people are always looking for a way to save time. Online donations are a great way to provide flexible options to your attendees, while bringing consistency to your weekly giving. Let's tour the online transaction options included in Rock.

These Tools Can Be Used For More Than Giving:

While the tools we'll discuss in this section were created mainly for online donations, they can be used for any type of online payment or transaction.

Types of Giving Transactions

As we've seen earlier there are two types of giving transactions:

- **One-Time Transactions:** A single specific gift given on a single date.
- **Scheduled Transactions:** A reoccurring transaction that follows a set schedule (weekly, monthly, etc.)

External Website Tools

Rock provides several pages for your website guests to use to set up and manage their online transactions. These pages can all be found under the *Give Section*.

[Giving Homepage](#)

Rock Solid Church
Home New Here? Resources Connect Give Hello Alisha ▾

Give

Home / Give

- Give Now
- Giving History
- Manage Giving Profiles
- Pledge
- Payment Accounts

Hello, Alisha

You currently have no active profiles.

Manage
View History

Give Now

"Bring all the tithes into the storehouse so there will be enough food in my Temple. If you do," says the LORD of Heaven's Armies, "I will open the windows of heaven for you. I will pour out a blessing so great you won't have enough room to take it in! Try it! Put me to the test!"

— Malachi 3:10 (NLT)

Frequently Asked Questions

What does your church believe about money?
God is our provider. He promises in Matthew 6:33 to provide for our needs. The Bible teaches that everything we have comes from God and belongs to Him. Psalm 24:1 says, "The earth is the Lord's and everything in it, the world, and all who live in it." Therefore, we are mere stewards of what God has given to us. Tithing is giving back to God what is already His. We return 10% back to Him.

What is the difference between a tithe and an offering?
The word "tithe" means one tenth. So when you tithe, you give one tenth or 10% of your earnings. Tithing (10%) is the starting point of giving. Offerings are gifts given above the tithe. God has blessed some people financially who are able to give substantially more than 10% and still live comfortably.

Why should I give money to the church?
We recognize that Jesus talked more about giving than He did on any other subject. Matthew 6:21 says, "For where your treasure is, there your heart will be also." Together, we work as a church to reach the lost. Malachi 3:10 says, "Bring the whole tithe into the storehouse, that there may be food in my house. Test me in this," says the LORD Almighty, "and see if I will not throw open the floodgates of heaven and pour out so much blessing that there will not be room enough to store it." The storehouse today is the local church you are attending. By partnering our monies together, God's work is done more effectively.

What are my giving dollars used for?
Your gifts are used to fund God's work through the ministry the church. We do this through our weekend services for adults and kids, and through our support of local and world wide missionaries. We can accomplish more together than separate.

What if we believe we can't afford to tithe right now?
The Lord requires us to be faithful regardless of how much He has entrusted to us. Luke 16:10 says "Whoever can be trusted with very little can also be trusted with much, and whoever is dishonest with very little will also be dishonest with much." It is when we are having financial struggles that we can't afford not to tithe. God wants us to trust Him in everything, including our finances. God asks us to tithe because through that, we become unselfish people and we show that we trust God to provide for our needs. As we grow in our relationship with Christ, it always requires faith. Trust God by giving to Him even when it seems impossible and allow Him to show you His provision for your life.

Does your church have a budget?
Yes. Our budget each year is determined based on the goals and objectives of each ministry area within the church.

What payment method options can I choose from?
The on-line giving program is configured to accept direct payments from checking or savings accounts. We also accept credit & debit card payments.

How often will payments be pulled from my account?
The program can be configured to pull funds from your account at a frequency that's right for you. Currently your options are described in the table below.

How do I participate in the weekend offering if I use the automated giving program?
If you wish, you can still participate in the weekend offering by dropping an empty envelope labeled "I Give On-line" into the basket.

How can I get a record of my giving?
You can request a giving statement from the church Finance Office at any time. This statement will cover both your automated giving as well as any other offerings you give on the weekend. To request a statement be send to you please e-mail us or call the church office.

How do I update my bank account or credit card information?
If you need to edit your bank account or credit card information please delete your existing profile and create a new profile.

Can I test this system by giving one time?
Yes. There is an option to give a one time gift. This is a great way to better understand how the system works.

I've signed up for the automated giving program but would like to change my preferences or need to stop. How do I do this?
You can make changes at any time by using the "View Giving Profiles" button on the sidebar. Once you login you can change any of your preferences or stop your automated giving. If you have any trouble please feel free to e-mail or phone the church office.

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3120 W Cholla St Phoenix, AZ 85029

- 1 Links to the various giving management pages.
- 2 If the guest is logged-in, a personalized view of their scheduled transactions will be shown with the option to give now.

Give Now Page

The give now page is a flexible page that walks a person through the process of giving in a wizard-like fashion.

Online Giving Flow



1 Entry Step:

The entry page is used to get the giving details from the guest. More information on this step and its settings can be found below.

2 Confirmation Step:

The next step in the process confirms what the guest has entered before saving and processing the transaction. The confirmation header and footer of this step can be customized from the block settings.

3 Final Step:

The final step provides the guest with the ability to save their account information (credit card or check account/routing number) for future use. It will also encourage the visitor to create a login to use for subsequent visits. Like the confirmation step, the header and footer can be updated from the block settings.

The entry step is by far the most complex. Let's look at it in more detail.

Give Now Page

Rock Solid Church New Here? Resources Connect Give Blog Calendar Watch Hello Alisha

Give Now

Home / Give / Give Now

Give Now

Giving History

Manage Giving Profiles

Pledge

Payment Accounts

1 Contribution Information

General Fund

\$ 0.00

Building Fund

\$ 0.00

Add Another Account **2**

Total 0.00

Frequency **3**

One-Time

When **4**

7/14/2017

5 Personal Information **5a** Give As Person Business

Name

Alisha Admin

Address

Address

City AZ Zip

Email

alisha@rocksolidchurchdemo.com

6 Payment Information

Credit Card Bank Account

Credit Card #

VISA Mastercard American Express Discover

Expiration Date / **Card Security Code**

Next

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- 1 Accounts:**
The guest will first be asked to select the dollar amount they would like to contribute to each account. The accounts that are listed are configured via a block setting.
- 2 Additional Accounts:**
You can also configure less-frequently used accounts to be added from a list.
- 3 Frequency:**
This setting determines if the gift will be one-time or be configured to process on a schedule of their choosing. See the section *Scheduled Transactions* for details on the scheduling patterns for each option. You can disable the creation of scheduled transactions using the block settings.

4 When:

This determines when the gift will come out of their bank. When used with a scheduled transaction this will be the start date for the schedule.

5 Personal Information / Business Information:

This is the name and contact information of the guest. If they're logged in, it will be auto-filled with their current information. If they change it here, this information will also be updated in the database. If they have given as a business, they can view the business name and information here as well by changing the Give As option to 'business'.

5a Give As:

When Business Giving is enabled, both the individual and business names will appear as tabs which allow the user to view the information of each.

6 Payment Information:

This contains the credit card or checking account information needed to process the transaction. The block settings define a payment gateway for both credit card and ACH (checking accounts). If you would like to disable either of these payment types, simply leave the gateway blank for the one you would like to exclude.

The giving entry block has a few other settings that you should know about. These include:

1. **Batch Name Prefix:** When the transactions are downloaded from the gateway, they're assigned to a batch. You can configure the names of these batches to all start with a certain prefix.
2. **Source:** For reporting, it's good to know where a transaction came from. For instance, you might use this block on your main website or a web-based kiosk in your lobby. Knowing the source for every transaction will help you determine the success of each platform. New source options can be set up under [Admin Tools > General Settings > Defined Types > Transaction Source](#).
3. **Address Type:** You'll want the address information the guest entered to be for their home address in most cases, but you can change this if you wish.
4. **Layout Style:** This setting determines if the layout should be:
 - **Vertical:** Sections are stacked vertically (default)
 - **Fluid:** Sections flow in a horizontal layout as they fit.
5. **Display Option For Selecting Additional Accounts:** Determines if the *Additional Account* option is shown.
6. **Impersonation:** This setting allows staff with proper security to enter in gifts for individuals in the database. This is helpful in cases where the block is used internally.
7. **Prompted For Phone:** Determines if the guest should be asked to provide their phone number on the entry screen (default is no).
8. **Prompted For Email:** Determines if the guest should be asked for their email address on the entry form (default is yes).
9. **Enable Business Giving:** This setting displays the option to give as a business. When selected, the user can toggle between their personal and business

information on the Give Now and Giving History screens.

10. **Confirm Account Email Template:** When a guest decides to create an account after confirming the gift, you can send them an email confirming this action. This setting allows you to select the email template to use for this email.
11. **Receipt Email Template:** When a guest's gift has been processed, you can send them an email receipt. This setting allows you to select the template to use for this email. If this setting is left blank no receipt will be sent.

Transactions that occur from the *Give Now* page will be immediately processed through the payment gateway and added to a batch using the *Batch Name Prefix* block setting.

Giving History

This page shows all other previous transactions for the logged-in user. Note the Show Giving For tabs which allow you to toggle between individual and business giving history.

Giving History

Rock Solid Church New Here? Resources Connect Give Blog Calendar Watch Hello Alisha ▾

Giving History

Home / Give / Giving History

[Give Now](#)
[Giving History](#)
[Manage Giving Profiles](#)
[Pledge](#)
[Payment Accounts](#)

The report below will allow you to view your previous giving. Use the date and fund filters to adjust the display. Show Giving For: Alisha Admin [CopperState Screen and Glass](#)

Available Contribution Statements

2017 YTD

1 Date Range **2 Funds**

1/1/2017 to 7/14/2017

General Fund
 Building Fund

3 Summary:
• General Fund: \$50.00

Date	Currency Type	Transaction Code	Summary	Amount
7/10/2017	Credit Card	T20170710113435583	General Fund (\$50.00)	\$50.00

50 500 5,000 1 Gifts

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1 Date Range:

This allows the user to filter the transactions shown to a specific date range. The default range is the first day of the current year as the start date and the current day as the end date.

2 Accounts:

Used to filter transactions based on the account. The list of accounts shown is configured on the block settings.

3 Summary:

Shows transaction totals based on the filters provided.

4 Transaction List:

Shows all the transactions based on the filters.

Manage Giving Profiles

This page allows the guest to managing any scheduled transactions they have created.

Manage Giving Profiles

Rock Solid Church Home New Here? Resources Connect Give Hello Alisha

Manage Giving Profiles

Home / Give / Manage Giving Profiles

Give Now

Giving History

Manage Giving Profiles

Pledge

Payment Accounts

Your current giving profile(s) are below. You can change the Frequency, Start Date, and Amount that you'd like to contribute by selecting the "Edit" button. If you wish to stop the automated giving program you can click the "Delete" button. Once you delete your profile you can create a new one at any time.

1

\$35.00 on ACH Every Week. Next gift will be on September 26, 2014.

Edit Delete

2

Create New Gift

Powered by: Rock RMS 3120 W Cholla St Phoenix, AZ 85029

1 Profiles:

Listing of all configured scheduled transactions with the ability to edit or delete each one. This listing is created with a liquid template that allows you to modify the markup that's used to build the list.

2 Add Profile:

Button that allows the guest to create a new scheduled transaction.

Moving To A New Payment Gateway:

If your organization decides to move your online giving to a new payment gateway, this block has settings to help you transfer your scheduled transactions to the new gateway. See the *Transferring Gateways* section of the *Payment Gateways* chapter for details on how to handle this scenario.

Saved Payment Accounts

Your website guests have the option to save their credit card and bank accounts for later use. This screen allows them to manage these accounts. The options on this screen will vary depending on your gateway provider. At the very least though your guests will be able to delete these accounts from this page. Some providers may allow you to also edit the saved payment accounts.

Rock Solid Church
New Here? Resources Connect Give Blog Calendar Hello Alisha ▾

Payment Accounts

Home / Give / Payment Accounts

[Give Now](#)

[Giving History](#)

[Manage Giving Profiles](#)

[Pledge](#)

[Payment Accounts](#)

Below are payment accounts that you have saved in the past. Click the red 'x' to delete these saved accounts.

Name	Account Number	Account Type	
Rock Solid Bank Card	*****1111	Credit Card - Visa	x

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Batches For Online Transactions

Unlike processing on-site transactions, which are manually entered, the creation of online transactions in Rock is an automated process. The steps differ a bit depending on whether the transaction is a one-time transaction or a scheduled reoccurring transaction.

One-Time Transactions

When a one-time transaction is created online, it's immediately sent to the payment gateway and processed. If the gateway accepts the payment, a transaction is immediately created in Rock. The transaction is added to an *Online Transaction* batch. The transaction will be placed in an existing batch if one is available with the following criteria:

- Is open
- Has a matching prefix to the one defined on the transaction entry block
- The current date and time falls in between the batch's start and end date

Otherwise, a new batch will be created for the transaction with a start and end date of the current day.

Future One-Time Gifts:

If a one-time gift is configured to process on a day other than the current day, it will be processed like a scheduled transaction.

Schedule Reoccurring Transactions

Scheduled transactions work a bit differently than one-time gifts. These transactions must be downloaded at a later date from the payment gateway. See the *Downloading*

Transactions section of the Payment Gateway chapter for details on how to download these transactions.

Accounts

Accounts determine what a transaction is for. In our examples above, both the *General Fund* and the *Building Fund* are accounts. These accounts usually tie into your accounting system. Accounts are managed under [Finance > Accounts](#).

Account List

This page shows a list of all the accounts defined in Rock.

Account List

Accounts
Home > Accounts

Add Account

- General Fund
- Building Fund
- Event Registration
- Mission Fund

General Fund

General giving fund

Public Name
General Fund

Is Tax Deductible
True

Edit Delete

Child Accounts

Filter Options

Name	Public Name	Active	Public	Tax Deductible	Starts On	Ends On
No Accounts Found						

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Note the hierarchical navigation tree on the left side of the screen. Like with the Group Viewer, this structure allows you to quickly and easily organize and view your accounts. Click the  button to filter by Active or All accounts.

Account List Filter Option

The screenshot shows a web interface for managing accounts. At the top, there's a breadcrumb "Home > Accounts". Below it, there's a "Show" filter with "All" and "Active" options. A "General Fund" dropdown menu is open, showing "General giving fund" as the selected item. There are also "Add Account" and "Order Top-Level Accounts" buttons.

Account Details

From the list above you can add or update an account using the account details screen.

The screenshot shows the "Account Details" form for the "General Fund" account. The form is divided into several sections:

- Name:** A text input field containing "General Fund".
- Description:** A text area containing "General giving fund".
- Public description HTML:** A large empty text area.
- Active:** A checkbox that is checked.
- Is Public:** A checkbox that is checked.
- Parent Account:** A dropdown menu.
- Account Type:** A dropdown menu.
- Public Name:** A text input field containing "General Fund".
- Campus:** A dropdown menu.
- GL Code:** A text input field.
- Start Date:** A date picker.
- End Date:** A date picker.
- Tax Deductible:** A checkbox that is checked.
- Url:** A text input field.

At the bottom of the form, there are "Save" and "Cancel" buttons. The footer of the page reads "Crafted by the Spark Development Network / License".

1 Name:
The name that will be used when selecting an account.

2 Description:

This is a great place to document what the account will be used for and any details you'd like to keep about when and how it should be used.

- 3 Active:**

Since accounts cannot be deleted if they are used by any transactions, you'll need to mark them *Inactive* once they should no longer be used.
- 4 Is Public:**

This is where you designate if the account is public and should be viewable on the public website.
- 5 Parent Account:**

Rock allows you to create account hierarchies to help manage situations when you need to configure numerous accounts.
- 6 Account Type:**

This setting allows you to categorize your accounts to help with reporting. The setting has no impact on how accounts are used in Rock. The list of account types can be set under [Admin Tools > General Settings > Defined Types > Account Types](#). You might consider using this setting to designate accounts that are used for donations vs. those you use for event registrations.
- 7 Public Name:**

You might want to describe your account differently when it's shown on the public website. This field allows you to configure a public-friendly name for your account.
- 8 Campus:**

If the account is specific to a campus, you can select the campus here.
- 9 GL Code:**

The reference code used in the General Ledger software.
- 10 Date Range:**

The date range you provide here will help determine when the account is displayed on various screens in Rock. If the account is no longer valid, based on the date range, then it will not be displayed when picking from accounts.
- 11 Is Tax Deductible:**

Helps determine if the transactions assigned to this account are considered tax deductible. This is used in reporting.
- * Url:**

Although unused in Rock's core features, this URL could be used to generate a link to a custom 'More Info' page.

Custom Account Attributes

To add custom account attribute, go to `Admin Tools > System Settings > Entity Attributes`. Once there add a new attribute and set the *Entity Type* field to *Financial Account* and set the other settings as needed. Once you do this, the account's attribute value can be edited near the bottom of the *Account Detail* page.

Giving Analytics

The giving analytics block provides you with a powerful tool for analyzing and reporting your giving information. Let's look at how we can use this block to empower your organization.

Chart Mode

Chart mode allows us to get summary information on the transactions that meet our search criteria. While the main view is the chart we can also get the numbers behind the chart.

Giving Analytics Chart Mode

1 Date Range

2 Total Amount

3 Limit by Data View

4 Available Accounts

5 Currency Types

6 Transaction Source

7 Accounts

8 Group By

9 Graph By

10 [Notification]

11 Show Data

1 Date Range

The first setting is the date range of the transactions that we're interested in.

2 Total Amounts

Located in the Advanced Options, this is a numeric range of dollar amounts that should be used to filter the total gifts on. Note that this range is on the total amount of gifts per giving unit for the period / filters you've provided not a range of a specific gift.

3 Limit by Data View

Located in the Advanced Options, this allows you to limit who is considered for the report based on the data view provided.

4 Available Accounts

Located in the Advanced Options, these allow you to decide whether to include only active accounts and/or only tax-deductible accounts.

- 5 Currency Types**
This allows you to filter gifts that were given by a certain currency type.
- 6 Transaction Source**
You can also filter on a source for the transaction. This allows you to see what medium your donors give by.
- 7 Accounts**
This setting allows you to filter by financial account.
- 8 Group By**
The group by setting tells us the time series to use on the x-axis of the chart.
- 9 Graph By**
This determines what series you would like to see on the graph.
- 10 Copy Link**
The *Copy Link* button lets you share the currently displayed overview of giving with a colleague.
- 11 Show Data**
This allows you to see the data behind the graph.

Details Mode

The details mode shows us the individuals behind the data. Note that the data is show by 'Giving Unit'. If an individual combines their giving with their family then the head of household will be listed instead of the individual matched to the transaction.

Giving Analytics Details Mode

1 Filter

2 Filter

3

Person	Total	Number of Gifts	Is First Gift	First Gift in Period	First Gift Ever	Last Gift in Period	Last Gift Ever
Decker, Ted	\$8,946.00	29		1/6/2015	1/6/2013	6/6/2017	6/6/2017
Dexter, Frank	\$1,320.00	22		1/6/2015	1/6/2013	4/6/2017	4/6/2017
Lowe, Craig	\$3,245.00	64		1/4/2015	1/5/2014	6/11/2017	6/11/2017
Marble, Bill	\$15,874.00	102		1/4/2015	1/5/2014	6/11/2017	6/11/2017
Grand Total							

Grand Total \$29,385.00

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1 Filter

An additional level of filtering is available when looking in details mode. You can choose to view transactions by:

- **All Givers:** This displays information for all giving units matching the criteria on the left.
- **First Time Givers:** This will only show information for giving units whose first gift is with-in the date range provided on the left.
- **Pattern:** This allows us to provide a pattern like 'Has given at least three times in the select range and did not give between another date range.'

2 Return Type

This setting provides four different ways to view family members that have a contribution transaction matching the selected filter criteria. These settings are a great way of getting lists of people to send communications to.

- **Giver:** This will show each of the giving leaders associated with the

matching transactions and the amount given. This view is best for determining the total amount given for each person because multiple people are not shown for the same transactions. Because of this, it is the only view that displays a grand total amount at the bottom of the list.

- Adults: This will show all the adults that have matching transactions or are combining their giving with a person who has matching transactions. It also displays the total amount given by the combined members with each adult listed.
- Children: This will show all the children that have matching transactions or are combining their giving with a person who has matching transactions. It also displays the total amount given by the combined members with each child listed.
- Family: This will show all family members who have matching transactions or are combining their giving with a person who has matching transactions. It also displays the total amount given by the combined members with each person listed.

For example, consider the Decker family. Ted and Cindy both have selected to combine their giving with the Decker Family, but Noah and Alex both give individually (they do not combine giving with any family). If Ted gave \$300, Cindy gave \$50, and Noah gave \$5 during the selected time period, the views would show the following:

- Giver: This will show Ted with \$350 given and Noah with \$5. This is because Ted and Cindy are the same "giving unit", and Noah is his own. Alex is also her own giving unit, but did not give anything during the selected period.
- Adults: This will show Ted with \$350 and Cindy with \$350. This is because they are the adults in their family and their combined, total given for the family was \$350.
- Children: This will show Noah with \$5. This is because Noah is a child in his family, he does not combine his giving with the family and his total given was \$5. Alex is also a child in the family but because she did not give anything and because she does not combine her giving with anyone who did, she will not appear in the list.
- Family: This will show Ted and Cindy each with \$350, and Noah with \$5. It shows \$350 for Ted and Cindy because that is the combined total of their giving since they are configured to combine their giving. It shows \$5 for Noah because he is not configured to combine his giving and his total was \$5. It does not show Alex because she did not give anything and she is not configured to combine her giving with anyone.

3 Data

The grid displays the transactions by giving unit that meet the provided criteria.

Last Gift Ever

Quick note on the 'Last Gift Ever' column on the Giving Analytics block. If spacing weren't an issue this column would really be named 'Last Tax-Deductible Gift Ever to Any Account'. When using patterns to exclude people with certain giving trends this column can be a little confusing until you realize it is not filtered by any account.

Pledges

Pledges predict the level of donations you can expect in a given timeframe. Some organizations use them to plan for their yearly budgets. Others use them to track what has been committed to a specific building or capital campaign. Either way, Rock can help you easily track these commitments.

Managing Pledges

Pledges are frequently given via paper commitment cards. When this occurs, someone within the organization will need to hand-enter the pledges into the system. This can be done under [Finance > Pledges](#). From this screen you'll see a list of all pledges currently in the system. You can use the grid filters to help limit which pledges are shown.

Pledge List

1 Filter Options:
Available pledge filters

2 Grid:
Listing of pledges that match the filters provided

Ready for the Spotlight

The Pledge List block has several block settings to show/hide columns and filter settings. This makes it a powerful block for your external website.

From this pledge list page you can update or add new pledges. The figure below shows this screen with the various options available.

Pledge Detail
Home > Pledges > Pledge Detail

Edit Financial Pledge

Person **1**
Ted Decker

Date Range **4**
11/1/2018 to 11/30/2018

Account **2**
Building Fund

Payment Schedule **5**
Weekly

Total Amount **3**
\$ 10000.00

Save Cancel

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- 1 Person:**
This is the person who is making the pledge. For families you'll want to pick the *head of house*. As with many of Rock's financial tools, pledges can be viewed from a family perspective when linked to any adult in the family.
- 2 Account:**
The account that the pledge is for. Often times this will be a unique account for a capital campaign or building fund.
- 3 Total Amount:**
This is the dollar amount that will be given over the duration of the pledge.
- 4 Date Range:**
This defines the duration of the pledge.
- 5 Payment Schedule:**
This determines how often gifts (financial transactions) will be given to meet the pledge amount.

Self-Entry

When possible it's a great idea for members to enter their own pledges online. This not only allows you to reduce the amount of data entry, it also allows them to create a reoccurring giving profile to match their pledge. The sample external website that comes with Rock already has a pledge entry screen configured for you to use. You can find this page under [Give > Pledge](#).

Pledge - Self Entry

Rock Solid Church Home New Here? Resources Connect Give Hello Alisha ▾

Pledge

Home / Give / Pledge

Give Now
Giving History
Manage Giving Profiles
Pledge

Thank you for your interest in making a commitment by pledging. Please complete the form below to complete your pledge.

First Name
Alisha

Last Name
Marble

Email *
alisha.marble@rocksoliddemochurch.com

Date Range
09/12/2014 to 02/27/2015

Total Amount *
\$ 20.00

Save

Note: This commitment is a statement of intent and may be changed as your circumstances change.

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This pledge block on the external site has several block settings to make it is very flexible for you to use. These settings include:

- **Enable Smart Names:** This feature will attempt to find a matching person record in Rock to link the pledge to. This match will occur if a record exists with an exact match on first name, last name and email address. There's also some logic built in to handle cases when someone types in *Ted and Cindy* or *Ted & Cindy* in the first name field. When this happens only the value *Ted* will be used in the search. If an exact match does not occur a new person record will be created with the record status of pending, for future review by an Admin.
- **Account:** If you provide a specific account as a block setting, the guest won't have to pick one, and their pledge will automatically be assigned to this account.
- **New Connection Status:** In the case where a new person record must be created this will be the connection status that will be assigned to the record.
- **Pledge Date Range:** This setting allows you to assign a date range for the pledge. If you provide both a start and end date these values will be used, no dates will display and the guest will not have to worry about entering them.
- **Show Pledge Frequency:** Determines if the *Pledge Frequency* field should be displayed. You may not want your guest to have to provide this information.
- **Require Pledge Frequency:** There may be times when you would like to show the pledge frequency but not require someone to enter one. In other cases, you might want to require this item. With this setting you can have it any way you'd like.
- **Save Button Text:** This setting allows you to customize the text of the *Save* button.
- **Note Message:** The block allows you to provide a note to your guests to help explain the pledge in more detail.
- **Receipt Text:** This is the message that will be displayed to your guest upon saving. This is a great place to celebrate their commitment. It comes out of the box

configured to link them to set up a reoccurring donation to match the frequency they selected. If one was not selected, it will allow them to pick one. This field supports liquid so you can personalize it.

- **Confirmation Email Template:** You can also select to send a template confirmation email after the save. This email template can use the same liquid merge objects from the Receipt Text field.
- **Enable Debug:** When you enable this setting, you'll see all of the available merge fields along with their values. This is helpful when you go to create your *Confirmation Email* and *Receipt Text*. These fields will only display after saving a pledge, so you'll need to save a sample one, and then delete it.

More On Block Settings:

Be sure to read [Designing and Building Websites Using Rock](#) for more information on changing block settings.

Once a person enters their pledge on-line you can still view and manage it using the same pages as described in the *Internal Entry* section above.

Pledge Frequencies

In several of the screens above, we mention picking pledge frequencies for determining how often someone will be giving towards their pledge. Rock comes pre-configured with several frequency values, but you can add to or edit them under [Admin Tools > General Settings > Defined Types > Recurring Transaction Frequency](#).

Pledge Analytics

Being able to track the status of pledges and report on pledge progress is critical for most capital campaigns. The pledge analytics block helps to answer these questions. Let's see what it's capable of.

Pledge Analytics

Pledge Analytics
Home > Pledge Analytics

Pledge Analytics

Account **1**
Building Fund Update

Date Range **2** 1/1/2015 to 12/31/2017 **7**

Previous **3**
3
Years

Pledge Amount **3**
to

% Complete **4**
to

Amount Given **5**
to

Show **6**
 Only those with pledges
 Only those with gifts
 Those with gifts or pledges

Person	Pledge Total	Total Giving Amount	Percent Complete	Giving Count
<input type="checkbox"/> Ted Decker	\$0.00	\$6,217.00	0 %	49
<input type="checkbox"/> Frank Dexter	\$0.00	\$380.00	0 %	38

50 500 5,000 2 Items

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- 1 Account**
The account that you would like to report on. This will filter both the pledges and giving.
- 2 Date Range**
The date range that will be used to filter pledges. Any pledge that is active during any part of the date range will be used. All gifts in the account selected above will be included in the report regardless of date.
- 3 Percent Complete**
Limits the pledges that are shown based on their percent completion.
- 4 Amount Given**
Limits the returned results based on the amount that has been give towards the pledge.
- 5 Show**
Determines what should be shown:
 - Only those with pledges: This only shows if a pledge exists for a person.
 - Only those with gifts: Will show anyone with a gift during the date range even if they don't have a pledge.
 - Those with gifts or pledges: If you have either a gift OR a pledge we're going to show you.
- 6 Shown**
Three options on what Pledge Analytics are shown.

7 Result Grid

After clicking "update" the results are shown here.

Giving On The Person Profile

If you're interested in the giving information for a specific person, you can visit their *Person Profile* page. There is a tab that allows you to view their giving information. This tab is configured to only be accessible by people in the following groups:

- RSR - Finance Administration
- RSR - Finance Worker
- RSR - Rock Administration

Contributions - Person Detail Page

Search



Ted Decker (Theodore)

Member Alert Note Exists Main Campus

add tag

39 yrs old (2/10/1979)
Male
Married 17 yrs (1/4)
Graduated 1994

(623) 555-3322 Home
(623) 555-3322 Mobile
(623) 555-2444 Work
ted@rocksolidchurchdemo.com

Today 0 / 76 eRA



eRA

Decker Family



Cindy
38



Peter Hinkle
12



Noah
11



Alex
8

Home Address
11624 N 31st Dr
Phoenix, AZ 85029

Person Profile
Extended Attributes
Groups
Contributions
Benevolence
Security
History

Summary of Contributions 1

Year	General Fund	Building Fund	Total
2017	\$1,098.00	\$774.00	\$1,872.00
2016	\$2,172.00	\$1,536.00	\$3,708.00

[Show More](#)

Pledge List 2

Account	Total Amount	Payment Schedule	Starts	Ends	Last Modified
Building Fund	\$10,000.00		11/1/2018	11/30/2018	7/10/2018

50 500 5,000 1 Financial Pledge

Add One-time Gift

New Scheduled Transaction

Available Contribution Statements

2017
2016
2015

Scheduled Transaction List 3

Filter Options ⌵ ⌵ ⌵

Contributor	Amount	Accounts	Frequency	Created	Starting	Ending	Next Payment	Currency Type	Schedule ID	Active	Last Refresh
Decker, Ted	\$100.00	General Fund: \$100.00	Bi-Weekly	7/10/2018	7/11/2018		7/11/2018	Credit Card	P20180710162306554	✓	7/10/2018 4:23 PM

50 500 5,000 1 Scheduled Transaction

Transaction List 4

Filter Options ⌵ ⌵ ⌵ Transactions Transaction Details

<input type="checkbox"/>	Person	Date / Time	Amount	Currency Type	Transaction Code	Batch Id	Accounts	Summary
<input type="checkbox"/>	Decker, Ted	6/6/2017 12:00:00 AM	\$312.00	Check	1122333344445	318	General Fund: \$183.00 Building Fund: \$129.00	Ted donated \$183.00 to the General Fund and \$129.00 to the Building Fund.
<input type="checkbox"/>	Decker, Ted	5/6/2017 12:00:00 AM	\$312.00	Check		317	General Fund: \$183.00 Building Fund: \$129.00	
<input type="checkbox"/>	Decker, Ted	4/6/2017 12:00:00 AM	\$312.00	Check		316	General Fund: \$183.00 Building Fund: \$129.00	
<input type="checkbox"/>	Decker, Ted	3/6/2017 12:00:00 AM	\$312.00	Check		315	General Fund: \$183.00 Building Fund: \$129.00	
<input type="checkbox"/>	Decker, Ted	1/6/2013 12:00:00 AM	\$300.00	Check		270	General Fund: \$175.00 Building Fund: \$125.00	

50 500 5,000 49 Transactions

Reassign Transactions ⌵ ⌵

Bank Account List 5

Account Number

No Bank Accounts Found

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- 1 Summary of Contributions:**
Summary of total contributions by year for the current user.
- 2 Pledge List:**
Filterable list of financial pledges for the current user.
- 3 Scheduled Transactions:**
Filterable list all of all reoccurring scheduled transactions.
- 4 Transaction List:**
Filterable list of transactions for the current user.
- 5 Bank Account List:**

Listing of bank accounts, from the matching transaction list, for the current user.

Family Giving

By default, giving transactions are summarized by family. This means that a husband and wife share the same giving total even if they split the duties of writing the checks.

Multiple Families

Since Rock allows people to be in multiple families, you can choose which family their giving applies to. This can be set from their *Person Profile* page by clicking the *Edit Individual* button, then *Advanced Settings*. The *Combine Giving With* allows you to pick a specific family.

Individual Giving

There are situations where even married couples will want their gifts split onto separate giving statements. If you leave the *Combine Giving With* field discussed above blank it will mark the individual as giving separate from the family.

Businesses

While Rock is all about managing people, there are some scenarios when financial transactions need to be managed for entities like businesses. Don't worry. Rock still has you covered. Businesses can be easily managed under [Finance > Businesses](#).

Managing business giving is also easy. Out of the box, Rock is set to allow business giving. When an individual gives as a business, both the individual and business information and giving history will appear in the Give Now and Giving History screens. If you don't want business giving available for your organization, simply disable this feature by selecting 'no' in the Enable Business Giving option in the Contributions block settings of the Give Now screen. For more information on Rock's business giving options, see the Online Giving section above.

Business List

Businesses
Home > Businesses

Convert Person/Business

Business Name	Contact Information	Address	Contacts
Phoenix Door Company	(555) 555-5555 bill@fakeinbox.com	123 Anystreet Anytown, AZ	Marble, Bill

50 500 5,000 1 Business

From the business list you can add, update or delete businesses.

Business Detail
Home > Businesses > Business Detail

Edit Phoenix Door Company Active

Record Status ①
Active

Name ②
Phoenix Door Company

123 Anystreet

Anytown AZ Zip

Phone Number ③
(555) 555-5555 SMS Unlisted

Email Address
bill@fakeinbox.com

Email Preference
 Email Allowed No Mass Emails Do Not Email

Campus ④
Main Campus

Save **Cancel**

Add One-time Gift
New Scheduled Transaction

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- ① **Record Status:**
Like individuals, businesses have a record status that allows you to mark them as inactive. Businesses can't be deleted from the database because there are historical financial transactions tied to them.
- ② **Name:**
The name of the business.
- ③ **Contact Information:**
Businesses allow you to store an address, phone number and an email address.
- ④ **Campus:**
Like individuals, businesses can be assigned to a campus.

Business Contacts

While businesses will be the source of donations and gifts (financial transactions), there will most likely be an individual that links the business to your organization. Being able to manage these relationships is important.

Once a business is saved, you can add contacts to the business from the individuals stored within Rock. These relationships can be viewed on the *Business Detail* page and

also on the *Known Relationships* section of the *Person Profile* page of the individual.

Business Details
Search

Business Detail

[Home](#) > [Businesses](#) > Business Detail

View Business
Active

<p>Business Name Phoenix Door Company</p> <p>Campus Main Campus</p>	<p>Address 123 Anystreet Anytown, AZ</p> <p>Phone Number (555) 555-5555</p> <p>Email Address bill@fakeinbox.com</p>
---	--

Edit

Business Contacts

Contact Name

Bill Marble X

1 Contact

Summary of Contributions

Add One-time Gift

New Scheduled Transaction

Pledge List

Account	Total Amount	Payment Schedule	Starts	Ends	Last Modified
No Items Found					

Scheduled Transaction List

Filter Options ▼

Contributor	Amount	Accounts	Frequency	Created	Starting	Ending	Next Payment	Currency Type	Schedule ID	Active	Last Refresh
No Scheduled Transactions Found											

Transaction List
Transactions
Transaction Details

Filter Options ▼

<input type="checkbox"/> Person	Date / Time	Amount	Currency Type	Transaction Code	Batch Id	Accounts	Summary
No Transactions Found							

Reassign Transactions

Bank Account List

Account Number

No Bank Accounts Found

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Person Detail Page

Search

Bill Marble (William)

Member
Alert Note Exists
Main Campus

add tag

54 yrs old (2/28/1964)
Male
Married

bill.marble@fakeinbox.com

Actions

0 / 16

+

Marble Family

Alisha
49

Home Address
3002 W Lupine Ave
Phoenix, AZ 85029

Person Profile
Extended Attributes
Groups
Contributions
Benevolence
Security
History

Timeline

Alert: Personal Note

Ted Decker
30 minutes ago

Bill is a great guy

Bookmarked Attributes

Connection Requests

Known Relationships

Phoenix Door Company (Business)

Peer Networks

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Business Contributions

Just as you can view the giving information for a specific person, you can also view the giving information for a business. To do this, simply go to **Finance > Businesses** and select the business name from the Business List. Rock will display all of the information and contribution history for that business, including yearly contribution statements. Financial transactions can also be entered from the Business Detail screen. Options include either a one-time gift or a new scheduled transaction.

Contributions - Business Detail Page

Search

Business Detail

Home > Businesses > Business Detail

👤
🔍
🔧
📁

View Business
Active

Business Name
Phoenix Door Company

Campus
Main Campus

Address
123 Anystreet
Anytown, AZ

Phone Number
(555) 555-5555

Email Address
bill@fakeinbox.com

Edit

Business Contacts
🔍 📄 +

Contact Name

Bill Marble ✕

50 500 5,000
1 Contact

🔍 📄 +

Summary of Contributions 1
+

2018

General Fund	\$100.00
Total:	\$100.00

Add One-time Gift

New Scheduled Transaction

Available Contribution Statements

2018 YTD 3

Pledge List 4
🔍 📄 +

Account	Total Amount	Payment Schedule	Starts	Ends	Last Modified
No Financial Pledges Found					

🔍 📄 +

Scheduled Transaction List 5
🔍 📄 +

Filter Options 🔍 📄 +

Contributor	Amount	Accounts	Frequency	Created	Starting	Ending	Next Payment	Currency Type	Schedule ID	Active	Last Refresh
No Scheduled Transactions Found											

🔍 📄 +

Transaction List 6
Transactions
Transaction Details

Filter Options 🔍 📄

<input type="checkbox"/> Person	Date / Time	Amount	Currency Type	Transaction Code	Batch Id	Accounts	Summary
<input type="checkbox"/> Phoenix Door Company	7/10/2018 4:56:35 PM	\$100.00	Credit Card	T20180710165635156	1483	General Fund: \$100.00	Online Contribution

50 500 5,000
1 Transactions

Reassign Transactions 🔍 📄

Bank Account List 7
🔍 📄

Account Number

No Bank Accounts Found

🔍 📄

- 1 **Summary of Contributions:**
Summary of total contributions by year for the business.
- 2 **Add Transaction:**
Options to either add a one-time gift or create a new scheduled transaction.
- 3 **Available Contribution Statements:**
Links to available contribution statements by year.
- 4 **Pledge List:**
Filterable list of financial pledges for the business.
- 5 **Scheduled Transactions:**
Filterable list all of all reoccurring scheduled transactions.
- 6 **Transaction List:**
Filterable list of transactions for the business.
- 7 **Bank Account List:**
Listing of bank accounts, from the matching transaction list, for the business.

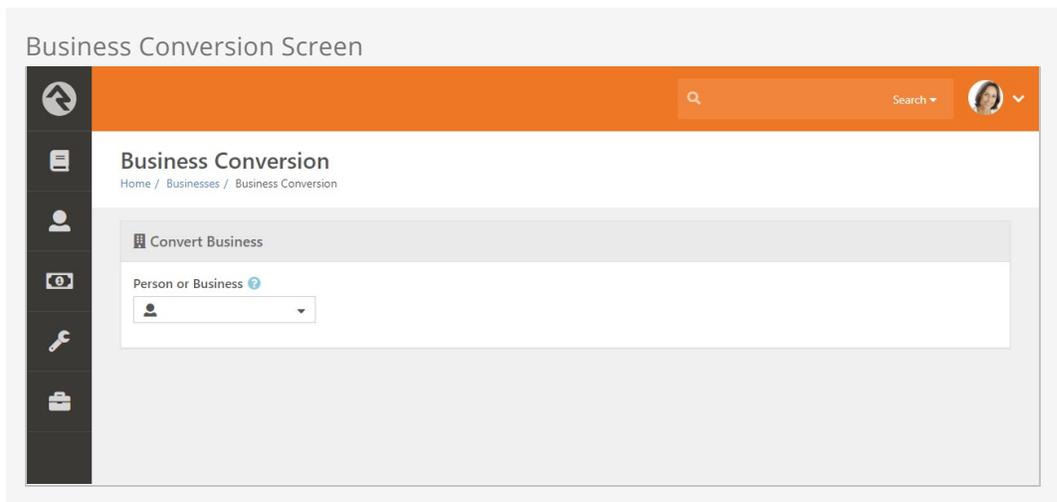
Scheduled Transactions for Businesses

Just as you can set up scheduled transactions for an individual, you can also set them up for a business. The process is the same, but rather than going to the contributions tab on a person's profile, you locate the business in the Businesses screen ([Finances > Businesses](#)). From the Business Detail screen you can either enter a one-time gift or set up a new scheduled transaction.

Converting a Person to a Business

While working with transactions, you may realize it would be best for Rock to consider a particular person a business or vice versa. Rock allows you to do this, though you'll rarely need to.

The process of converting a person to a business or a business to a person is simple. Access the *Business Conversion* screen by clicking the [Convert Person/Business](#) button at the top of the *Business List* screen, located at [Finance > Businesses](#) .



Select the person or business you want to convert, double check that the settings Rock will use to convert the person or business are correct, and click [Save](#) . Note: Rock won't convert a person with family members to a business because it would result in those family member records being lost. To convert a person with family members to a business, first move the person to their own family.

Security For Finance

The finance features in Rock have been secured to only give access to those who need it. The following security roles have been created with the permissions below.

Finance Security Roles

RSR - Finance Worker: The finance user role is allowed to view and edit basic finance information like batches and transactions. They are not allowed to make modifications to the configuration of the finance features. For instance, they can't add a new account.

RSR - Finance Administration: The finance administrator role is allowed to view and edit all finance information including configuration information like accounts.

Areas That Are Secured

The following areas of Rock have been secured to limit access to financial information. Only those in the finance roles will have access to the following:

- **Finance Admin Pages:** All the pages under *Finance* on the main navigation.
- **Person Details Contribution Tab:** The *Contributions* tab on the *Person Profile* page.
- **Rock Check Scanner:** Log-in to use this application.
- **Data View Filters:** Write data views that report on financial information. (Once the data views are created however, anyone who has permission to view the data view can run them. Be sure to secure the data views you create.)
- **Reports:** Creating reports. (Once the reports are created though, they can be run by anyone with view access to the report.)

Additional Security Actions

The following can be secured separately from the permissions provided Finance Workers and Administrators:

- **Financial Batch Entity:** Only those with security permission will be able to delete a batch.
- **Financial Transaction Entity:** Only those with security permission will be able to initiate a refund.
- **Filter by Person on Financial Transaction List Block:** Only those with security permission will be able to filter transactions on the Financial Transaction List block by person.

Benevolence

The benevolence feature allows you to track the assistance you provide to those in need. This tracking allows you to better understand who is being helped and how much help you are providing. Let's see what's possible.

Request List

The benevolence features can be found under `Finance > Benevolence`. The first screen shows a list of benevolence requests that have been entered into the system. This list will quickly grow to be quite long so be sure to use the filters at the top to help you find the specific requests you're working on.

The screenshot displays the 'Benevolence List' interface. It features a navigation sidebar on the left with icons for home, list, user, search, settings, and reports. The main content area has an orange header with a search bar and a user profile icon. Below the header, the title 'Benevolence' is followed by a breadcrumb 'Home > Benevolence'. The main section is titled 'Benevolence Requests' and includes a 'Filter Options' dropdown. A table lists two requests with columns for Date, Campus, Name, Connection Status, Government ID, Request, Case Worker, Result Summary, Result Specifics, Status, and Total Amount. A summary table at the bottom right shows 'Total Results' for 'Provided Financial Assistance' and 'Total'.

Date	Campus	Name	Connection Status	Government ID	Request	Case Worker	Result Summary	Result Specifics	Status	Total Amount
7/10/2018	Main Campus	Ben Jones	Member		Needed help with this month's electric bill.		Provided Financial Assistance	(\$100.00)	Approved	\$100.00
7/10/2018	Main Campus	Sarah Simmons	Member		Requested help with groceries.				Pending	\$0.00

Total Results	
Provided Financial Assistance:	\$100.00
Total:	\$100.00

Note that at the bottom of the screen you'll see summary totals for each category of assistance you have provided. These totals are for all of the transactions that match the provided filters.

Request Detail

The request detail shows the specifics of the request as well as the results of the request. Note that in many cases you will be selecting a person in the database that the request is for. Since some requestors may not be in the system, you can also simply enter in their name and contact information here. This keeps you from having to enter a new record in the database for them. It's up to you if you would like to have a record or not.

Benevolence Details

Benevolence Detail
Home > Benevolence > Benevolence Detail

Benevolence Request Approved

Request Date: 7/10/2018 1 Case Worker: 2 Campus: Main Campus Request Status: Approved

Requestor

Person: Ben Jones 3

First Name: Benjamin Last Name: Jones Connection Status: Member

Email: ben.jones@fakeinbox.com 4 Address: 10601 N 32nd Dr, Phoenix, AZ 85029 Government ID:

Home Phone: Cell Phone: Work Phone:

Request Details

Description of Request: 5 Needed help with this month's electric bill.

Is Attendee: Yes 6 Amount Requested:

Related Documents 7

Results

Result Summary: 8 Provided Next Steps: 9

Result Type	Amount	Details
Provided Financial Assistance	\$100.00	<input type="button" value="x"/>

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1 Case Worker

This is the person who will be working with the individual to determine need and what the response should be. This is helpful if there is a team of people working on these requests. The values in this dropdowns come from the group members of the 'RSR - Benevolence' security role. You can change this to use a different group in the settings of this block.

2 Request Status

This is the current status of the request. You can manage the options that are displayed in this dropdown under `Admin Tools > Defined Types > Benevolence Request Status`.

3 Person

The person record to tie the request to. Selecting a person here will automatically enter the contact information below and set the campus for the request if one is not already present.

4 Contact Information

You can also chose to not tie the request to a record in the database and simply enter the person's name and contact information in instead.

5 Description of Request

It's to document what the person is seeking in terms of help.

6 Request Attributes

If you've added custom attributes to your benevolence request they would display here. For our example we've added two attributes. These won't be in your database. We'll cover how to add custom attributes to benevolence requests below.

7 Related Documents

Here you have the ability to attach documents to the request. You can add up to 6 documents. These documents are stored in the database. If you'd prefer to use a different storage medium be sure to update the file type for the 'Benevolence Request Document'.

8 Result Summary

This field allows the case worker to enter notes about what was given, including background information on the decision.

9 Provided Next Steps

Often times the results of a benevolence request will have associated next steps. For instance you may suggest they take a specific class. You can keep these notes in this field.

10 Result Type

This is a list of the actual assistance that was given. You can add (or remove) new result types under

`Admin Tools > Defined Types > Benevolence Result Type`.

Benevolence on the Person Profile

Those with access to view benevolence information will see a *Benevolence* tab on the *Person Profile* page. The requests shown here are summarized for the entire family. So, if Sarah Simmons makes a benevolence request, it will also show on Jim Simmon's profile.

Benevolence List

The screenshot shows a user profile for Ben Jones (Benjamin) with a photo, age (38), gender (Male), and marital status (Single). It includes a navigation sidebar, a search bar, and a 'Benevolence Requests' table. The table has columns for Date, Campus, Name, Connection Status, Government ID, Request, Case Worker, Result Summary, Result Specifics, Status, Total Amount, Is Attendee, and Amount Requested. A single request is listed for 7/10/2018, Main Campus, Ben Jones, Member, with a request for help with an electric bill, resulting in a \$100.00 approved financial assistance. A 'Total Results' summary box shows a total of \$100.00 for provided financial assistance.

Date	Campus	Name	Connection Status	Government ID	Request	Case Worker	Result Summary	Result Specifics	Status	Total Amount	Is Attendee	Amount Requested	Amount
7/10/2018	Main Campus	Ben Jones	Member		Needed help with this month's electric bill.			Provided Financial Assistance (\$100.00)	Approved	\$100.00	✓		

Total Results	
Provided Financial Assistance:	\$100.00
Total:	\$100.00

Benevolence Security

The benevolence pages are secured to only allow those in the 'RSR - Benevolence' security group access to them. Be sure to add the appropriate people to this group to enable this feature.

Adding Custom Attributes

Adding custom attributes to benevolence requests is simple using the steps below.

1. Head to the *Entity Attributes* page under `Administration > System Settings > Entity Attributes`.
2. Click the add button to add a new attribute.
3. The first thing you'll want to do is set the 'Entity Type' field to 'Benevolence Request'. You can leave the qualifier fields blank as they are not needed.
4. Complete the attribute setup as you would any attribute. Note though that the

'Show in Grid' will display the attribute on the benevolence request list block and allow you to filter on it.

Defined Types For Financial Features

There are several defined types used by the various financial features of Rock. Below we'll talk about each of them and tell you why they're important.

Account Type

This groups or categorizes Accounts by their usage. It's provided for you specifically to help with reporting and is not used by Rock for any specific purpose.

Credit Card Type

This defined type determines which credit card types your organization will accept. Each card type also has several configuration options. These include:

- **Regular Expression Pattern:** This pattern helps Rock determine if a given card number matches this type of credit card. The default values should not be altered.
- **Batch Name Suffix:** Many times accounting teams want online transactions to be placed in batches specific to the credit card types when they are downloaded from the payment gateways. The suffix is what helps group the cards into batches. If all the cards have the same suffix, they will all share a batch (default setting). If you'd like all the Visa transactions to be in their own batch, then you'd change the suffix to something like *Visa*.

Recurring Transaction Frequency

This defined type determines which frequency types you want to offer your guests. These options must be supported by your payment gateway to work, so don't add new ones and wonder why they don't show up.

Refund Reasons

This defined value is not currently used. It will be used in the future for event registration purposes.

Tender Type

Determines the method (Cash, Check, Credit Card, etc.) a person used to make a financial transaction. Tender Type is used to help describe the payment source for a transaction and is also used in determining how batches are created.

Transaction Source

This value helps determine where the transaction took place. This is helpful in

reporting. Many of the transaction entry blocks allow you to pick this value, so by all means add additional items that make sense to your organization. For instance, if you run multiple websites with their own giving pages, you may want to make a new source type for each site. This will help you determine which is most effective in generating donations.

Transaction Type

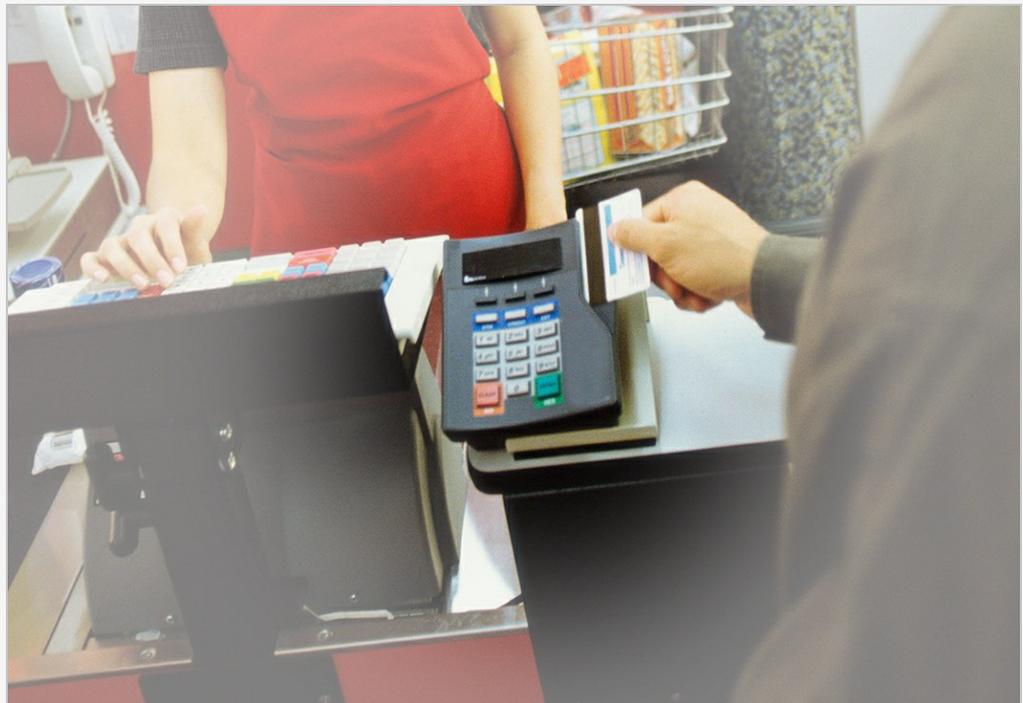
The Transaction Type helps describe the purpose of each transaction to Rock. For instance, all transactions of type 'Contribution' tell Rock that these are contributions and should be shown on Contribution Statements. You should not create new types that replace the ones that come out of the box. You can, however, rename the existing ones. For instance, you could rename 'Contributions' to 'Offerings' if you prefer.

Payment Gateways

When we start getting into the concepts of how financial transactions work in our modern economy things can get confusing pretty quickly. Don't worry though, we not only want you to understand how to use Rock, we also want to help you to understand the concepts of what's going on behind the scenes. Let's help to demystify the concept of payment gateways.

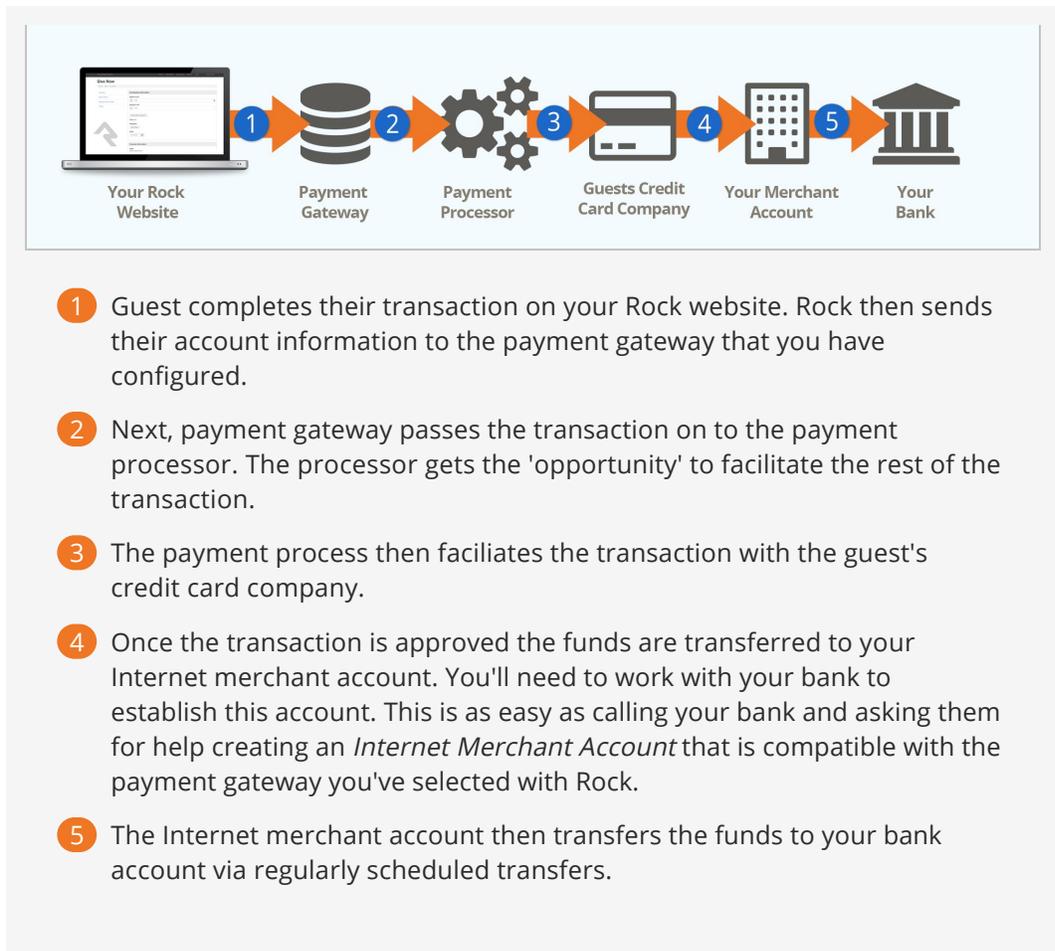
We're all familiar with the concept of checking out at the store. The clerk rings up our purchases at the register and once a total amount has been determined, we swipe our card through the credit card terminal and we're done. Using this analogy Rock would play the role of the register and the payment gateway is the digital equivalent of the credit card terminal. Like the register, Rock helps determine what is being purchased/donated and comes up with a total amount. Rock then takes the guest's account information (either their credit card or checking account information) and sends it through the terminal (aka payment gateway).

Gateway Analogy



At that point the transaction has started its journey through the financial system. In

many ways you're done with it, but let's track its journey and note some places that you'll need to initially configure.



Learn More

You're probably thinking this is all too much information. Understanding how this works though can save even a small organization tens of thousands of dollars. One large organization recently started saving over \$200K per YEAR by understanding how this process works and ensuring they received the best rates.

We highly recommend reading this [Credit Card Processing 101 PDF](#) from NMI. They've made the process easy to understand with a visual walk-thru.

Available Payment Gateways

Currently Rock supports the following payment gateways:

- NMI
- Payflow Pro

See our Rock Shop for additional options.

You might be wondering which one you should select? Here are some factors to consider:

- **Do you already have a gateway?** If you already use one of the gateways above then it makes the most sense to keep using it.
- **PCI:** PCI is a credit card process standard to ensure the security of credit cards. Compliance to PCI is a very time consuming process. The NMI gateway drastically reduces your PCI compliance requirements by ensuring that a visitor's credit card information never touches your server.
- **Fees:** Of course fees are a huge consideration when looking at gateways. You'll want to consider the fees and rates of each before selecting a gateway.
- **Location:**
Are you located outside the United States? For countries outside the continental US, please contact Carolyn Irwin directly at cirwin@gotnp.com.

While Rock has a built-in gateway with NMI and MyWell as well as internal tools for your use, we realize that every church has unique needs. We've also partnered with several giving vendors (see our [Partners page](#)) that offer integrations with Rock and a variety of tools and information that may be customized to your situation. If you elect to use one of our Rock partners for your giving solution, their tools may replace the Rock financial tools, or they may be used in conjunction with them. Because each giving partner offers different packages, you'll want to discuss your needs with all of them to determine the best fit if Rock's out-of-the-box giving tools are not what you're looking for.

The Importance of Getting It Right

It's important to make a strategic decision when selecting a gateway. As you start building a base of scheduled gifts it will be hard to transition them to a new gateway in the future. Their card data is stored in the gateway and most gateways will not give you your cardholder data back if you choose to move. See the [Transferring Gateways](#) section below if you find yourself in this situation.

Configuring a Gateway

Payment gateways can be configured under [Admin Tools > System Settings > Financial Gateways](#). There you will notice that there are actually two options: Payflow Pro and a Test Gateway. We created the Test Gateway as a way to allow Rock to come pre-configured in a way that allows an organization to sample Rock's tools without having to configure an actual payment gateway. Below is a screenshot of the various settings for the Payflow Pro gateway.

Gateway Detail
Home > System Settings > Financial Gateways > Gateway Detail

Pay Flow Pro

Name 1
Pay Flow Pro

Active 3

Description 2

Gateway Type 4
Pay Flow Pro

Batch Time Offset 5
12:00 AM

PayPal Partner 6

PayPal Merchant Login

PayPal User
admin

PayPal Password

Mode 7
 Live Test

Save Cancel

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- 1 **Name:**
The name of the gateway
- 2 **Description:**
Description of the gateway. Useful if you plan to use multiple gateways of the same type.
- 3 **Active:**
Set the status of the gateway.
- 4 **Gateway Type:**
The type of gateway to use.
- 5 **Batch Time Offset:**
By default online payments will be grouped into batches with a start time 12:00:00 AM. However if the payment gateway groups transactions into batches based on a different time, this offset can be specified so that Rock will use the same time when creating batches for online transactions.
- 6 **Login Information:**
The various login criteria needed to work with the gateway.
- 7 **Mode:**
Determines whether this gateway is set to live or test mode. Only available for Pay Flow Pro.

Other Configuration Steps

Once you're done setting up your gateway, you'll need to set it as the active gateway on the giving pages.

Transferring Gateways

As mentioned earlier, transitioning to a new payment gateway is difficult due to the way the payment gateway providers control the credit card details. Once you set up your new payment gateway, you have two things to consider.

1. You need to prevent people from setting up new giving transaction using the old gateway.
2. You want users with scheduled transactions tied to the old gateway to transfer to the new gateway.

The first item is easily accomplished by changing the block setting on the *Give Now* page to use the new gateway. The second item is a bit trickier.

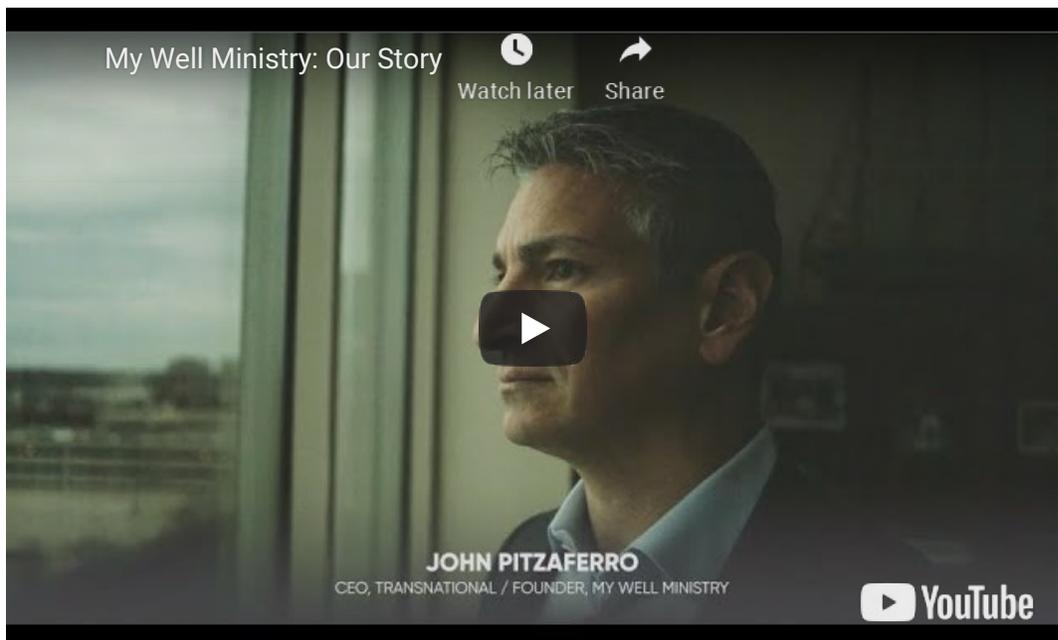
There are some block setting options on the *Manage Giving Profiles* page that will assist your users with transferring their scheduled transactions to the new gateway. Consider adjusting these settings from the Scheduled Transaction List Liquid block:

- **Gateway Filter:** Setting a particular gateway here will cause only those scheduled transactions using this gateway to show up in the output list.
- **Transfer-To Gateway:** When set, the `Edit` button becomes a `Transfer` button if the scheduled transaction's gateway does not match the transfer-to gateway. When users press the `Transfer` button, they will be taken to the *Give Now* page with many details from their existing transaction copied onto the form. Once the new transaction is completed, their old scheduled transaction is automatically deleted.
- **Transfer Button Text:** This setting lets you control the text that appears on the transfer button.

NMI Gateway

The NMI gateway has several unique features that make it a great fit for many organizations. The first feature to consider is that it significantly reduces your PCI compliance requirements. With the NMI gateway a visitor's credit card never touches your Rock server. This allows you to complete a much simpler compliance survey.

While you can setup a NMI gateway on your own we highly recommend that you talk with MyWell Ministry to take advantage of their credit card processing program for churches. This program provides credit card processing AT COST (yes, truly this is at their cost, they make nothing). This program has saved organizations tens and even hundreds of thousands of dollars a year. Also if you decide to go with MyWell and would like to change in the future they will give you all of your saved credit card numbers in a PCI compliant encrypted file. Want to know more? Check out a video about the project.



You can sign up for an NMI gateway account through MyWell using the button below.

[MyWell NMI Sign-up](#)

(They also note that if it works better for your church, you can sign up using the above link and tell them that you'd rather have them be the processor for the PayFlowPro gateway.)

Configuring the NMI Gateway

There are a couple of unique settings for the NMI gateway. Let's look them over and discuss their meaning.

The screenshot shows the 'Gateway Detail' page for 'Network Merchants (NMI)'. The page is titled 'Gateway Detail' and has a breadcrumb trail: 'Home > System Settings > Financial Gateways > Gateway Detail'. The main content area is a form for configuring the gateway. The form includes the following fields and controls:

- Name:** A text input field containing 'Network Merchants (NMI)'. To its right is an 'Active' checkbox, which is currently unchecked.
- Description:** A large text area for providing a description.
- Gateway Type:** A dropdown menu set to 'NMI Gateway'.
- Batch Time Offset:** A time selection control set to '12:00 AM'.
- Security Key:** A text input field.
- Admin Username:** A text input field containing 'admin', highlighted with a yellow background and a blue circle '1' next to it.
- Admin Password:** A text input field with masked characters '.....', highlighted with a yellow background.
- Three Step API URL:** A text input field containing 'https://secure.networkmerchants.com/api/v2/three-step'.
- Query API URL:** A text input field containing 'https://secure.networkmerchants.com/api/query.php'.
- Prompt for Name On Card:** A dropdown menu set to 'No', highlighted with a blue circle '2' next to it.
- Prompt for Billing Address:** A dropdown menu set to 'No', highlighted with a blue circle '3' next to it.

At the bottom left of the form are 'Save' and 'Cancel' buttons. At the bottom of the page, it says 'Crafted by the Spark Development Network / License'.

1 Account Information

Once your account is complete MyWell will provide the details for these three boxes.

2 Prompt for Name On Card

This determines if the payment screens should prompt for a name on the card.

3 Prompt for Billing Address

Finally, provides the billing address for credit cards, if prompted.

Note

The *Prompt for Name On Card*, *Prompt for Bank Account Name*, and *Prompt for Billing Address* options are provided due to the fact that NMI may or may not require this information from your users. By default, NMI does not require the Name on Card and Billing Address fields, but if you have enabled address verification in the NMI security settings, you will need to prompt the user for their billing address. If you do not enable this prompt, the user will get an error returned by the processor indicating that required information is missing.

Duplicate Transactions

By default, NMI rejects duplicate transactions within a 1200 second window. That means that any transaction executed with the same amount and card number inside of the same 20 minute window as an earlier transaction will be rejected. That can be problematic for some situations since you could legitimately have the same credit card used to make multiple contributions for the same amount or make multiple event registrations for the same event. To work around this issue, you will need to ask Transnational to reduce the window time for checking duplicate transactions (we recommend at least a 2 minute window).

Account Setup

When setting up a new account with Transnational/NMI, they will disable the requirement to have a CVV. To do this they will need to know that your account is for Rock RMS. If for some reason this setting is set you will get error messages in your NMI console for scheduled transactions that read 'Error: A card security code has never been passed for this account.' Be sure to pay close attention to your NMI console as you roll out your giving. Actually, this is a good suggestion for rolling out any payment gateway.

Unique Scheduling Notes

NMI supports One Time, Weekly, Biweekly, and Monthly schedules. Notice there is no support for "twice a month".

Transaction Downloads

Whenever the transaction download job runs and queries transactions from NMI, it will download all of the transactions that were added or updated during a certain time period and that are associated with a scheduled transaction. This includes transactions that may not have "settled" yet, or transactions that failed.

The transaction download job handles these transactions differently. For each transaction, it will first look for any existing transactions in Rock with the same "transaction code" and totals their amount. It considers this the "Existing Rock Amount".

Then it considers the status of the transaction that was just downloaded to calculate a “Processed Amount”. If the transaction downloaded is a failure (i.e. declined), the processed amount is 0.00. If it’s not a failure, the processed amount is the total amount of the transaction. If the “Existing Rock Amount” and the “Processed Amount” are different, a new transaction will be added to rock to with an amount equal to the difference between these two values. If this amount is negative, the transaction is created as a reversal.

Setting a Payment Reversal Notification Workflow

The Get Scheduled Payments Job Detail screen, located in `Admin Tool > System Settings > Jobs Administration`, includes an option to trigger a workflow when a scheduled transaction is declined. You can configure the workflow to perform any necessary follow-up task, such as sending an automated email. Simply configure the workflow in your General Settings, then select it from the Failed Payment Workflow dropdown menu.

Other Notes

Below are a few other notes to consider when using the NMI gateway.

- Saved accounts are not supported for repeating schedules.
- Reactivating scheduled transaction is not supported.
- Updating a scheduled transaction is not supported.
- Querying for the status of a scheduled transaction (i.e. active or not) is not supported.

Payflow Pro Gateway

Below are details about the Payflow Pro gateway with information on getting started and details that are unique to it.

Setup

You can set up a new account at the address:

<https://www.paypal.com/webapps/mpp/payflow-payment-gateway>

A couple of things to keep in mind:

- Although the Payflow Pro service is run by PayPal, this is not a traditional PayPal account. Payflow Pro is a service that PayPal purchased from Verisign many years ago.
- Be sure to sign-up for the Payflow *Pro* not the Payflow *Link* account.

At the time of writing this manual, the costs for a Payflow Pro account were:

- **Setup:** \$99
- **Monthly:** \$25
- **Gateway Fee:** \$.10 per transaction
- **Recurring Billing:** \$10 per month

Unique Scheduling Notes

While most of the schedules like weekly, monthly, etc. are pretty obvious, there are a couple of notes you should consider about Payflow Pro's scheduling.

Once A Month

On a rare occasion, someone might say that they want their payment to be on the last day of the month. Since the number of days in the month varies this may seem impossible. With Payflow Pro however if you choose the start date as the 31st of the month, the payment will always occur on the last day of the month.

Twice a Month

This basically states that you want two transactions a month. Many people will select this with a start date of the first of the month. When they do, the transactions will come out of the account on the 1st and 15th.

When the guest selects a starting date between the 1st and 15th, it's pretty simple to determine their payment schedule. It will always be the day of the month of their start date for the first payment and 15 days later for the second.

When the guest selects a starting date later than the 15th of the month, then the pattern changes a bit. One payment will come out on the numerical day of the starting date (e.g. the 25th of the month). The second payment date will be fifteen days after this date.

Configuring Reference Transactions

By default PayPal does not allow reference transactions. However, when a user selects to save their credit card information as a saved account in Rock, the next time they use that account, Rock processes it as a reference transaction. To support that functionality, you need to adjust your PayPal settings. You can find the setting to allow reference transactions can under [Account Administration > Manage Security > Transaction Settings](#).

Setting Up Reference Transactions

PayPal | Manager [PayPal.com](#) | [Documentation](#) | [Downloads](#) | [Support](#) | [Log Out](#)

[Home](#) | [Account Administration](#) | [Service Settings](#) | [Search Transactions](#) | [Virtual Terminal](#) | [Reports](#) |

[Contact Information](#) | [Processor & Merchant Bank Information](#) | [Manage Security](#) | [Manage Users](#) | [Account Preferences](#)

[Transaction Settings](#) | [Allowed IP Addresses For Manager](#) | [Allowed IP Addresses For API](#) | [Change Password](#) | [Security](#)

Transaction Settings Help

Specify rules governing all transactions here. For example, you can set the maximum allowable amount for transactions to \$2000 and require that credits can be issued only for existing transactions. These settings place restrictions on transactions from any PayPal service: Payflow Link, PayFlow Pro, and PayPal Manager.

Note: Any changes made will take effect in an hour.

Maximum Amount per Transaction:

* **Maximum Amount for Credits:**

* **Allow Non-referenced Credits:** Yes No

* **Credits may exceed original transaction amount:** Yes No

Allow reference transactions: Yes No

* These settings can no longer be modified. Please contact Customer Support at 1-888-883-9770 to request to have them changed.

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Configuring Email Confirmations

Payflow Pro can be configured to send email confirmations when each scheduled transaction occurs. This email is set inside the Paypal Manager under "Service Settings > Recurring Billing > Customer Email".

Setting Up Email Receipts

PayPal | Manager [PayPal.com](#) | [Documentation](#) | [Downloads](#) | [Support](#) | [Log Out](#)

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Configure Customer Email Help

Set your account to send an email receipt to your customers each time their accounts is billed. You may want to monitor your account for any failed transactions.

Receipt and Transaction Report Email

Email Receipt to Customers
 Email Optional Transaction Report to Customers

Receipt Sender:

Header Text:

Footer Text:

Failure Notification Email

Email Payment Failure Notifications to Customers

Payment Failure Sender:

Header Text:

Footer Text:

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Contribution Statements

When it's time to generate contribution statements, we've created some tools to make the process simpler. Since you may need to be able to both email and mail printed statements, the best file format will be a PDF, and we have just the tool for the job. Let's walk through the process of generating PDF statements with our statement generator software.

Installing the Statement Generator Software

Installing the statement generator software is easy. It does require a Windows machine running Windows 7 or better to run. To install, follow the steps below:

1. Download the setup application under `Admin Tools > Power Tools > External Applications > Rock Statement Generator`.
2. Run the setup. The statement generator setup is a breeze with just three quick screens.

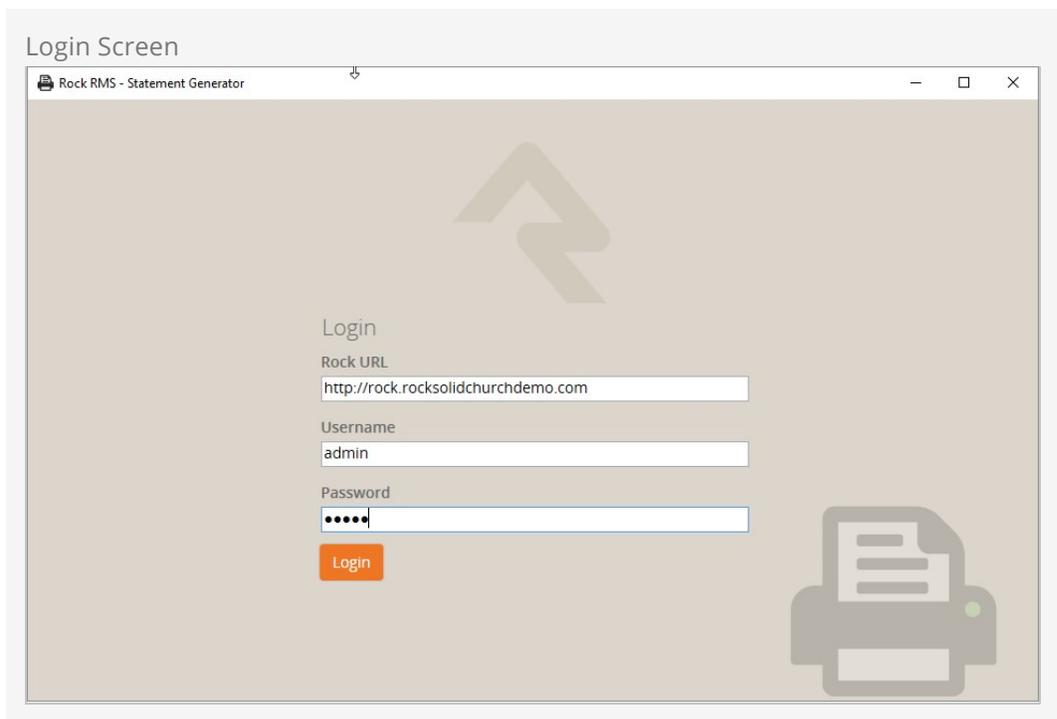
Using the Statement Generator Software

Once you have it set up, it's pretty simple to operate the statement generator software.

Start by launching it and logging in. Users must be a member of one of the groups below to log in with this software:

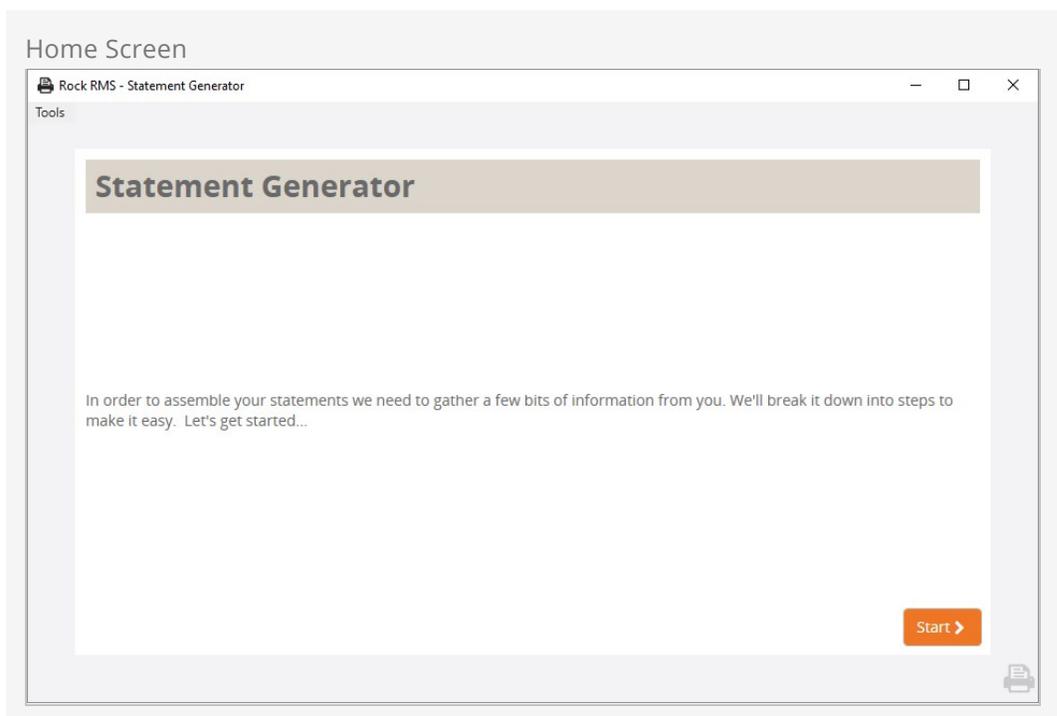
- RSR - Finance Administration
- RSR - Finance Worker
- RSR - Rock Administration

Please note that if this is your first time logging in, you'll also be asked for the web address of your Rock server.



If you need to change the Rock URL, you can do so from the Statement Generator screen pictured below by clicking the *Tools* button in the upper-left corner and selecting *Options*.

To generate statements, click the **Start** button.



Step 1: The *Who Needs a Statement* screen lets you select whether you want to generate statements for *All individuals with transactions and/or pledges*, filtered by a *dataview*, or for a specific individual.

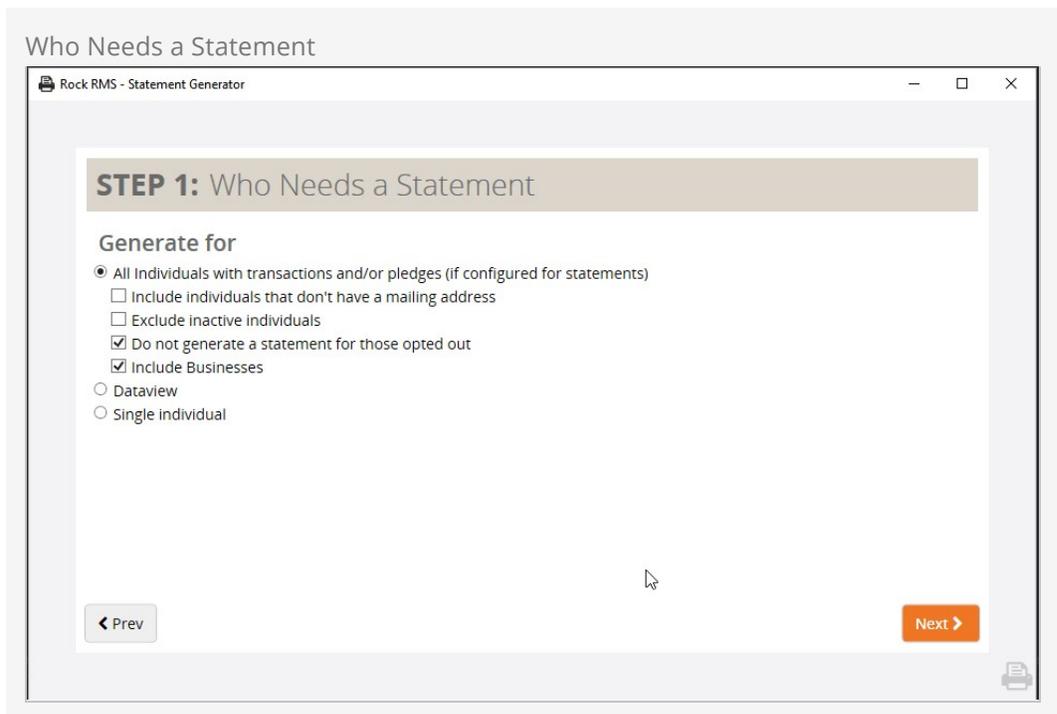
There are several options to consider when selecting *All individuals with transactions and/or pledges*.

- **Include individuals that don't have a mailing address:** The end result of the statement generator is a printable PDF of statements designed to be mailed out. Select this option if you don't want to generate statements for people whose profiles don't include a mailing address.
- **Exclude inactive individuals:** Select this option if you don't want to generate statements for people with an inactive status.
- **Do not generate statement for those opted out:** Select this option if you don't want to generate statements for people who have opted out. Opting out is based on a person's "Do Not Send Giving Statement" attribute, located on their profile. If a person's "Do Not Send Giving Statement" attribute is "Yes", and that person is the Giving Leader, a statement won't be generated. If a person's "Do Not Send Giving Statement" attribute is "Yes" but they are not the Giving Leader, a statement will still be generated, unless the Giving Leader also has their "Do Not Send Giving Statement" attribute set to "Yes".
- **Include businesses:** This option, which is selected by default, allows you to generate statements for businesses.

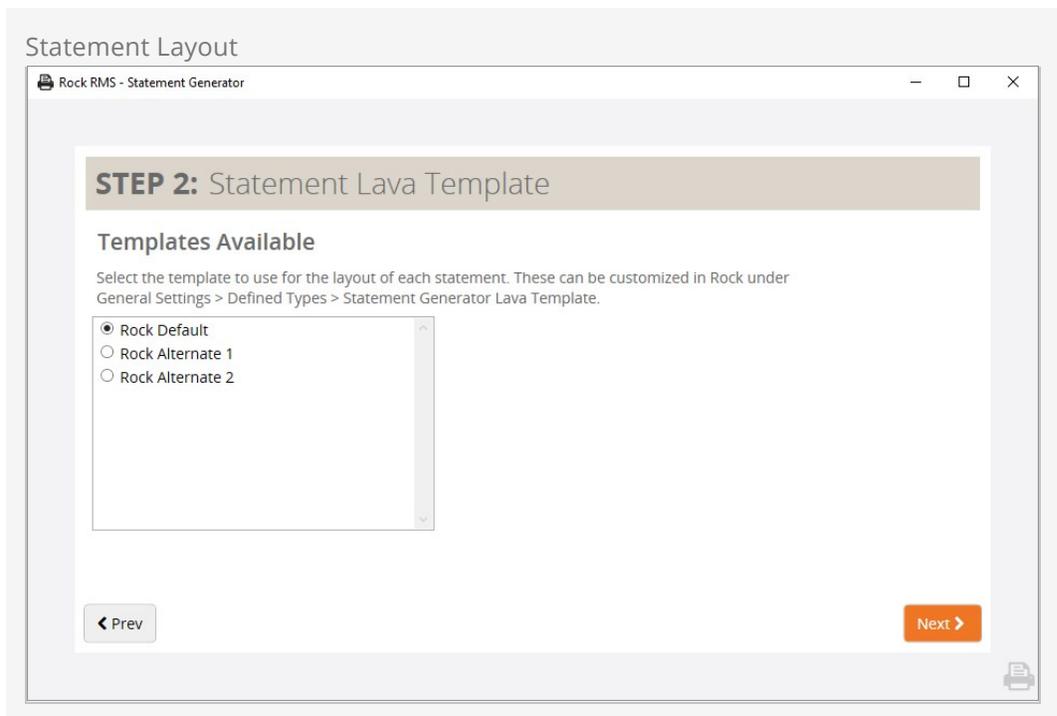
Adding Children to Families and Giving Groups

If the Rock system has a custom job to move children to new families, that job will also need to set the child's person record's giving group to the new family (or null to indicate giving individual). If not, the statement will go to the address of both the old and new family with the transactions still combined.

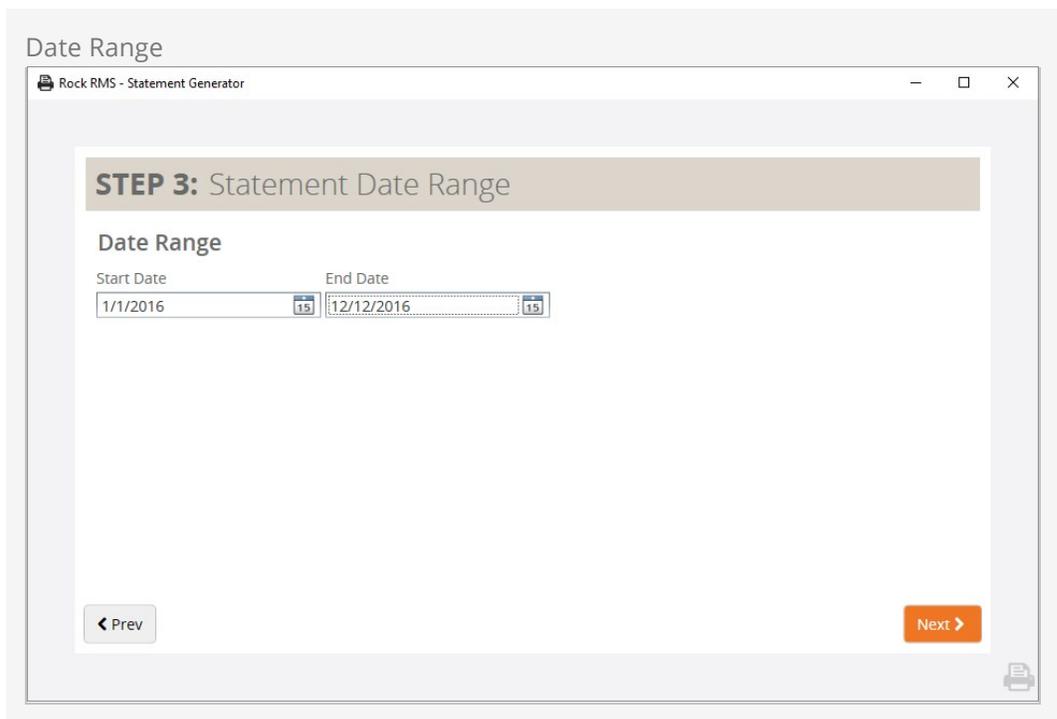
If you select *Single individual*, you'll be prompted with a search box where you can type in a person's name. If more than one person is listed in the grid, click on the person you want to generate the statement for. Press to go to the next step.



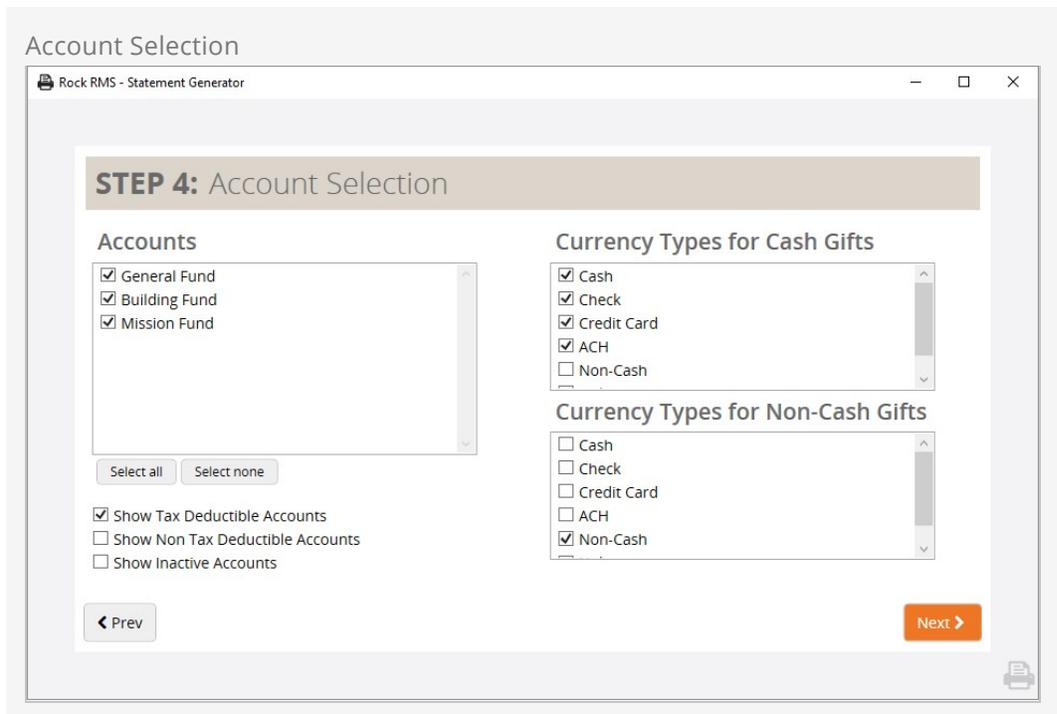
Step 2: Select the template you want to use for the statement output. Rock ships with three templates, which you can customize with your own logo, wording, etc. You can also create your own. The Statement Generator Lava Templates are located in Defined Types ([Admin Tools > General Settings > Defined Types](#)). In the *Statement Generator Lava Template* screen, select the template you want to modify or click  to add a new one.



Step 3: The *Statement Date Range* screen is where you specify the date range of the statements you want to generate. The generator defaults to the current year-to-date.



Step 4: The *Account Selection* screen is where you select the account or accounts you want to include. You can also specify which currency types to include for both cash gifts and non-cash gifts. Clicking the additional checkbox options below Accounts (*Show Tax Deductible Accounts*, *Show Non-Tax Deductible Accounts*, and *Show Inactive Accounts*) will reveal additional account options to select from.



Step 5: The *Pledge Information* screen is where you select the pledge(s) you want to include in the statements. Accounts for Pledges will only include immediate child accounts (one level deep) when the child account option is selected. (Note: If this option

is selected, only select the Top Level accounts that you want to be included in the Pledge summary sections. Don't also select its child accounts.)

If a pledge starts *after* the start of the Statement Date Range, it won't be included. For example, if a pledge starts on 11/05/2017, it shouldn't show up if the statement is for 11/1/2016 to 10/31/2017. Pledges that ended *before* the statement date range will also not be included. For example, if a pledge ended on 10/31/2016, it shouldn't show up if the statement is for 11/1/2016 to 10/31/2017.

Pledge Information

Rock RMS - Statement Generator

STEP 5: Pledge Information

Accounts for Pledges

- Building Fund
- Event Registration
- Mission Fund

Select all Select none

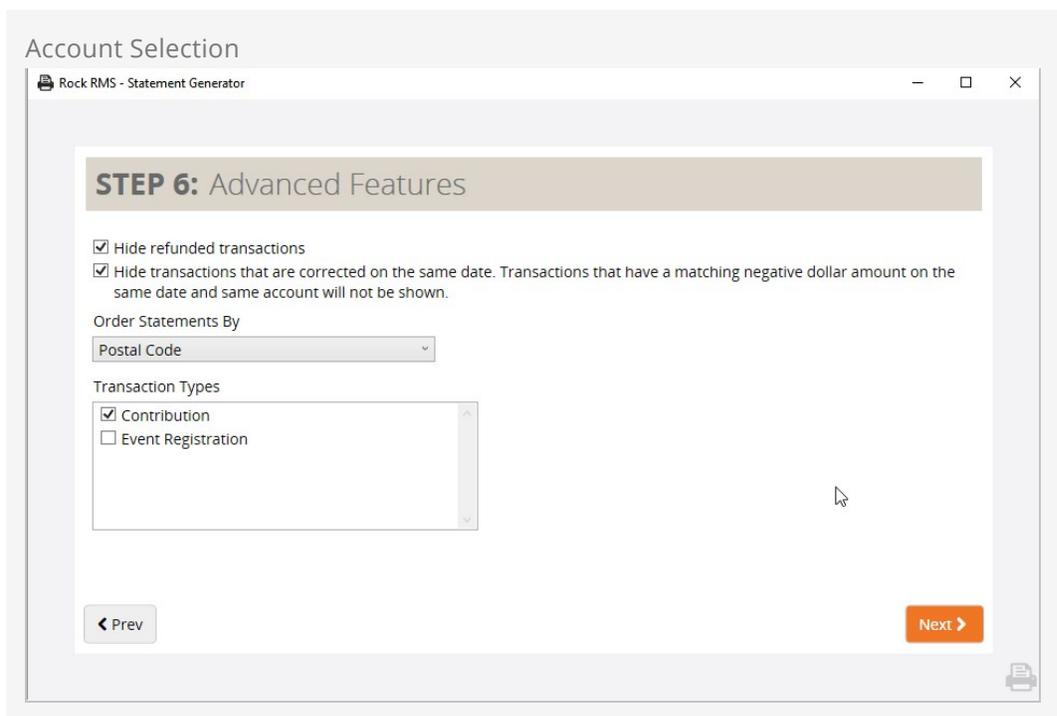
Show Inactive Accounts

Include gifts to child accounts as part of the pledge

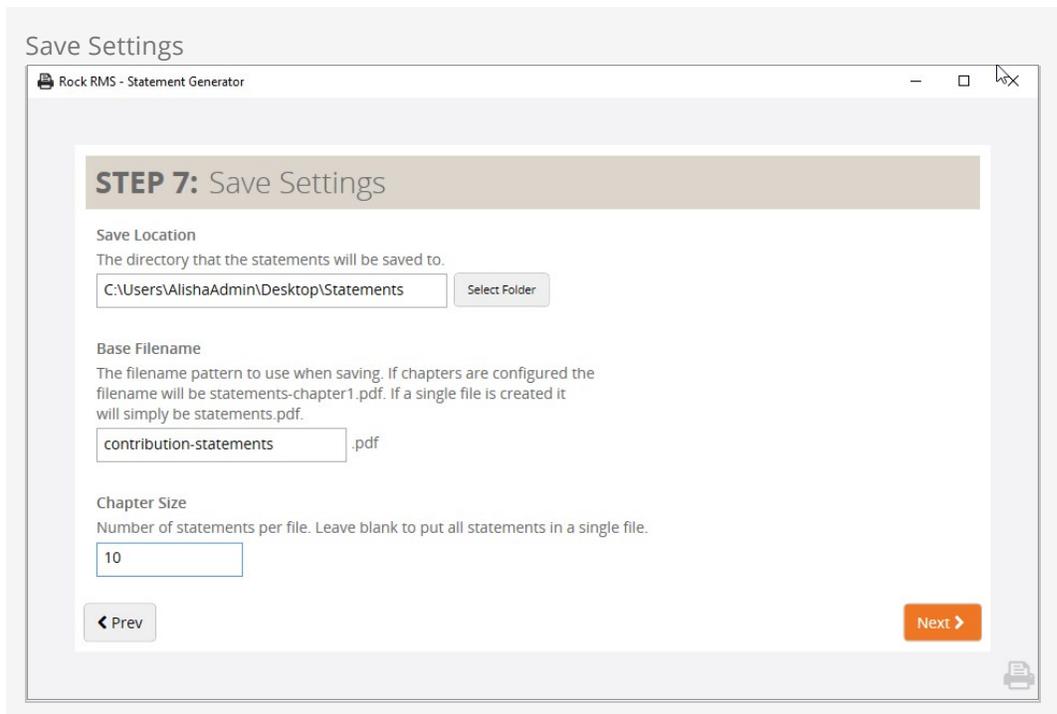
Include non-cash gifts

Prev Next

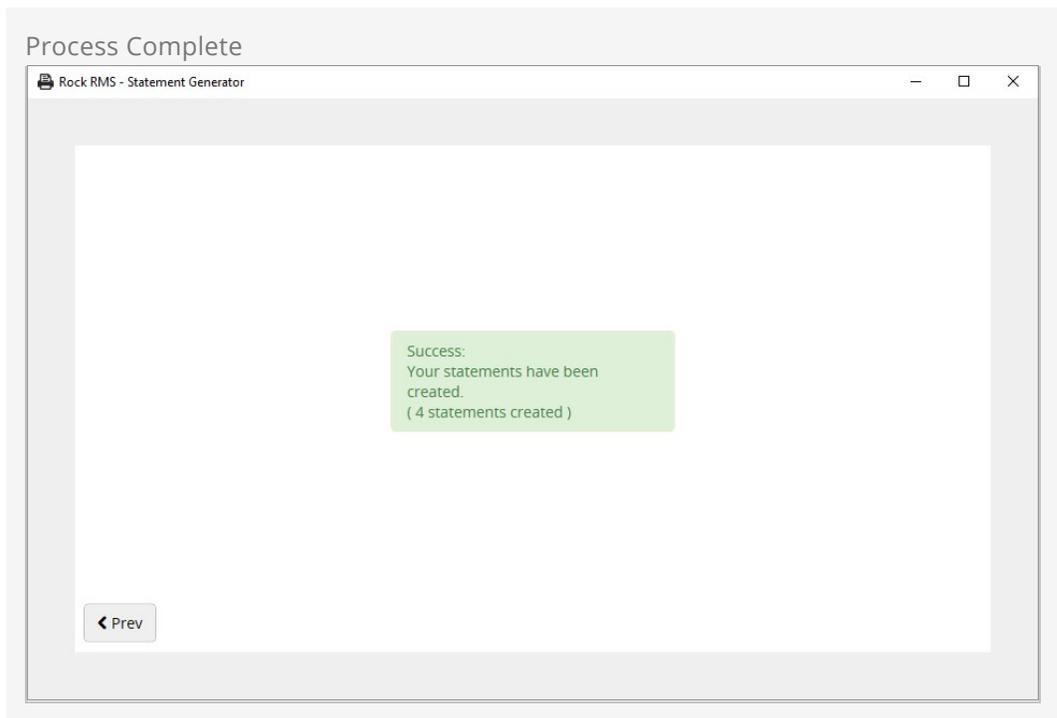
Step 6: The *Advanced Features* screen allows you to hide refunded transactions, and/or hide transaction that are corrected on the same date. It also gives you the option of ordering the statements by postal code or last name, and selecting which transaction types you want included.



Step 7: The *Save Settings* screen allows you to choose the location where you want to save the statements, as well as designate a base filename pattern to use when saving. You can also choose to break up the statements into chapters by entering the number of statements you want to include per chapter in the Chapter Size field. If you leave this field blank, all of the statements will be compiled into a single file.



The statement generator will start to process the statements after you press **Next**. When the process is complete, the generator will display a "Success" message with the number of statements generated.



Online Contribution Statements

Your website visitors can get access to their contributions online from the *Giving History* page. Statements links will be available for years in which they gave. The *Transaction Report* block settings allow you to pick which accounts to consider (by default all tax-deductible are used). The output is all customizable using Lava so feel free to change it.

Contribution Statement List

Rock Solid Church New Here? Resources Connect Give Blog Calendar Hello Alisha ▾

Giving History

Home / Give / Giving History

- Give Now
- Giving History**
- Manage Giving Profiles
- Pledge
- Payment Accounts

The report below will allow you to view your previous giving. Use the date and account filters to adjust the display.

Available Contribution Statements

2016 YTD 2015 2014

Date Range **Accounts**

1/1/2016 to 5/3/2016

General Fund
 Building Fund

Apply

Summary:

- General Fund: \$543.00
- Building Fund: \$384.00

Date	Currency Type	Summary	Amount
1/6/2016	Check	General Fund (\$181.00) Building Fund (\$128.00)	\$309.00
3/6/2016	Check	General Fund (\$181.00) Building Fund (\$128.00)	\$309.00
4/6/2016	Check	General Fund (\$181.00) Building Fund (\$128.00)	\$309.00

50 500 5,000 3 Gifts

The resulting contribution statement is shown below. The *Contribution Statement Lava* block has several settings to help pick accounts and whether the pledges should be shown. The entire statement is generated in Lava so you have complete control on how the data is displayed.

Contribution Statement Sample



Rock Solid Church
3120 W Cholla St Phoenix, AZ 85029
www.rocksolidchurchdemo.com

Charitable Contributions for the Year 2016

1/1/2016 - 5/4/2016

Ted, Cindy & Noah Decker
11624 N 31st Dr
Phoenix, AZ 85029

[Print Statement](#)

Gift List

Date	Giving Area	Check/Trans #	Amount
4/6/2016	General Fund		\$181.00
4/6/2016	Building Fund		\$128.00
3/6/2016	General Fund		\$181.00
3/6/2016	Building Fund		\$128.00
1/6/2016	General Fund		\$181.00
1/6/2016	Building Fund		\$128.00

Fund Summary

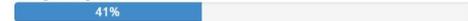
Fund Name	Total Amount
General Fund	\$543.00
Building Fund	\$384.00

Pledges

General Fund

Amt Pledged: \$5000.00
Amt Given: \$2073.00
Amt Remaining: \$2927.00

Pledge Progress



Thank you for your continued support of the Rock Solid Church. If you have any questions about your statement, email info@rocksolidchurchdemo.com or call .

Unless otherwise noted, the only goods and services provided are intangible religious benefits.

Contribution Statements on the Person Profile Page

You can view the same contribution statement above on the *Person Profile* page. You'll find a listing of contribution statements on the 'Contributions' tab.

Contribution Statement List

Person Profile Extended Attributes Groups **Contributions** Benevolence Security History

Summary of Contributions

2017	
General Fund	\$1,854.00
Mission Fund	\$950.00
Total:	\$2,804.00
2016	
General Fund	\$3,978.00
Mission Fund	\$1,950.00
Total:	\$5,928.00

[Show More](#)

Add One-time Gift

New Scheduled Transaction

Available Contribution Statements

2017 2016 2015

Advanced Transaction Entry Block Settings

This section may get a bit technical. Not that you can't handle technical; we just want to give you a heads up that we're going to be talking about advanced settings and uses. It isn't rocket science, but it might be a little challenging.

The Transaction Entry block is one of the most useful and versatile blocks available in Rock. You can set it up on any page of your site and use it for any number of purposes: online giving, on-site giving, scheduled transactions, fundraising...even event registration if you want (though the Event Registration function is probably a better option). Now, thanks to the generosity and creativity of the Rock community, the Transaction Entry block has a ton of options, giving you even greater flexibility.

There are two tabs in the Transaction Entry block: Basic Settings and Advanced Settings. Let's take a look at the options available on both.

Basic Settings Tab

The Basic Settings tab is where you'll likely do most configuring. Some of the options on this tab relate to options in the Advanced Settings tab, though, so be sure to check out those as well. In the meantime, here are the options available on the Basic Settings tab.

Account Header Template

This Lava-enabled field allows you to dynamically label the Account Amount inputs with whatever name you want. The default setting uses the Account Public Name, or `{{ Account.PublicName }}`. In most cases, this is probably what you'll want to use, but there may be times when a different label is better suited. For example, if you use the Transaction Entry block for fundraising, you may want to use a simple text label, such as Donation Amount, instead.

Scheduled Transactions

This dropdown provides the option of setting up scheduled transactions. When using the Transaction Entry block for regular giving, you'll probably want to leave this set to "Allow". This lets your regular givers set up automated giving. There may be instances when scheduled transactions don't make sense, though, such as when used for a limited-time fundraiser. In such cases, set this field to "Don't Allow".

Connection Status and Record Status

Every transaction must be associated with a Person, even if the giver is anonymous (i.e., not logged in). When an anonymous person gives, Rock automatically creates a Person record behind the scenes. The Connection Status and Record Status options set here determine the connection status and record status of that new record. The default

Connection Status is “Web Prospect”. The default Record Status is “Pending”.

Payment Comment

This Lava-enabled field allows you to create a comment to include with the transaction when sent to the payment gateway. It will also be stored as the Summary in Rock’s copy of the transaction. Like any Lava-enabled field, you have a lot of options when it comes to what you can include in the comment. It may be as simple as “Online Contribution” or “Fundraiser”, but you can create a more elaborate comment using Lava merge fields. See the help menu on the Payment Comment field for more Lava tips. Keep in mind, though, some payment gateways may limit the amount of text that can be included in the comment.

Enable Comment Entry

This option allows the giver to enter additional text to include in the payment comment, which is then sent to the payment gateway and stored in Rock as the summary of the transaction.

Enable Business Giving

When enabled, this option allows the person to give as a business. If the person is logged in and has a business associated with their profile, the business name will be listed. They can either select that business or create a new business record and associate it with their profile.

Enable Anonymous Giving

This option allows the giver to give “anonymously”. Because every transaction must be associated with a person, it won’t truly be an anonymous transaction. Finance administrators will be able to see the person’s name and address, and the transaction will be included with the person’s giving statement. But this option does allow the option of hiding the person’s name and address in certain situations, such as fundraising, when a giver may wish to remain anonymous to the recipient and the public.

Advanced Settings Tab

Now let’s take a look at the options available in the Advanced Settings tab.

Allow Account Options in URL

This option allows you to bypass the Accounts settings (in the Basic Settings tab) and present accounts according to parameters listed in a URL. You may find this option handy when the guest arrives at a giving page from a different page on your website, or when they’re sent to a giving page by a third party. Valid URL parameters are:

- Comma-delimited lists of AccountIds (e.g., 1, 2, 3, etc.)
- Comma-delimited lists of AccountGLCodes (e.g., 40100, 40110, etc.)
- Default amount to give for each account (e.g., 35.00, 50.00, etc.)
- Whether or not the giving amount is editable (i.e., true or false)

Here's how the parameters appear when included in URLs:

```
http://...?AccountIds=1^50.00^false,2^25.50^false,3^35.00^true
```

```
http://...?AccountGLCodes=40100^50.00^false,40110^42.25^true
```

Only Public Accounts

This option works hand-in-hand with the Allow Accounts in URL option. This field lets you decide if only public accounts should be displayed via URL. If the Allow Accounts in URL is active, this option will ensure that only public accounts are presented to the guest, even if non-public account ids are specified in the URL. This acts as a safety measure to help minimize the chance of a private account being displayed in the URL.

Invalid Account Message

If the Allow Accounts in URL option is enabled, you can use this field to customize an error alert message (in text or HTML) to be displayed if an invalid AccountId or GIAccount is passed in the URL. This message may be useful if you want the giver to know the reason some of the accounts specified in the URL aren't shown.

Account Campus Context

This option allows you a lot of flexibility when it comes to displaying accounts according to campuses. Depending on the option you select, you can limit which accounts are presented based on the person's campus.

- If "Only Accounts with Current Campus Context" is selected, only the account associated with that campus are displayed.
- If "Accounts with No Campus and Current Campus Context" is selected, and "Allow Accounts in URL" is not configured, the Accounts setting (on the Basic Settings tab) determines which accounts will be displayed, then limits them by campus.
- If "No Account Campus Context Filter Applied" is selected, accounts will not be filtered by campus.

Transaction Type

In most cases, the transaction type you'll use is "Contribution". There may be times, though, when you'll want to use the Transaction Entry block for another purpose. You can create additional transaction types for each purpose in the Transaction Type Defined Type Detail screen ([Admin Tools > General Settings > Defined Types > Defined Type Detail](#)). Those additional transaction types are then listed in this field and available for use in the Transaction Entry block.

EntityIdParam

This field allows you to set the Page parameter that will be used to set the EntityId value for the Transaction Detail Record. This parameter works with the Transaction Entity Type. See Transaction Entity Type below to learn more.

Transaction Entity Type

In Rock, you can associate transactions with entities, including entities from plug-ins. This allows you to track transactions by entity type. The Transaction Entity Type field lets you to associate an entity based on the Transaction Entity type and Entity Id Param settings. In order for this to work, both must be configured, and the EntityIdParam must be included in the URL as a parameter. For example, when using the Transaction Entity Type for a specific fundraising participant, you would do the following:

- Set the Transaction Entity Type to "Group Member".
- Set the EntityIdParam to "GroupMemberId".
- Include both the Transaction Entity Type and EntityIdParam in the URL as a parameter.

For example:

```
http://...?GroupMemberId=10
```

In this case, when the transaction is saved, the `FinancialTransaction.EntityId` is set to "10" and the `FinancialTransaction.EntityType` is set to "Group Member". As a result, the transactions associated with the entity type can be tracked on a fundraising progress page.

Transaction Header

This Lava-enabled field allows you to display content prior to the Amount entry field. This will be the first thing the guest sees when they visit the transaction page. While you can leave this field blank, you could also use this space to present the guest with specific information. In fact, using Lava here, you can do some really cool things. For example, in a fundraising page, you can use Lava in this field to show how much money has been raised so far, and how much is left to raise. (Remember, like any Lava block, a Lava developer can use the 'Lava' | Debug command to view all of the available merge fields.)

Additional Transaction Entry Block Functionality

There are a few other tips and tricks you might be interested related to transactions and the Transaction Entry block.

AccountLimit

You can set a limit on the amount people can contribute by using the `AccountLimit` parameter in the URL. For example:

```
http://...?AccountLimit=150.00
```

In this case, guests will not be able to contribute more than \$150.00. This may come in handy for fundraisers, where you to set a maximum contribution amount.

Transfer

You can transfer a scheduled transaction to a different transaction as its basis using the "Transfer" and "ScheduleTransactionId" parameters in your URL. This may be useful if you want to give people the option to specify a different amount or payment method than they regularly use for an existing scheduled transaction.

Attribute

You can specify attributes and their values in the URL in order to apply them to the Transaction Record. This requires you first set up the `FinancialTransactionEntity` attributes. When using the attributes and values in the URL, use the "Attribute_" format. For example, if a transaction has the attributes "FavoriteColor" and "LikesMovies", the URL would be formatted:

```
http://...?Attribute_FavoriteColor=Red&LikesMovies=True
```

Set Schedule Frequency in URL

You can set two different scheduled giving options in the URL using the `Frequency` parameter or the `Frequency Start Date`.

Below is a URL example with the following format:

Frequency=DefinedValueId^UserEditable (where DefinedValueId is the value of the frequency of the recurring transaction and UserEditable is whether or not the user can change the value).

```
http://...&Frequency=133,false
```

Here is a URL example with StartDate={Date} format.

```
http://...&StartDate=2019-03-21
```