Engage Giving

CDM+ Engage Giving

Suran Systems provides online giving through Engage Giving. This class covers the setup, administration and use of Engage Giving.

Many online giving options are available to today's churches, but only CDM+ Engage Giving interacts with your CDM+ database, automatically entering online gifts into CDM+ Contributions and Fund Accounting thereby freeing staff for other ministry-related activities.

With CDM+ Engage Giving, anyone can donate securely and easily to any church fund(s) you designate, using a debit or credit card or an ACH withdrawal from a checking or savings account simply by visiting your website or using the smart device “app”. A single gift may be split among several funds, with the receipt detailing how the gift was allocated,

CDM+ Engage Giving it is not an app, it creates a URL for people to use to make electronic contributions. Mobile devices offer a procedure to “make” this URL appear as an app button on the mobile device. Engage Giving offers the same experience – a clean display, smooth operation and the ability to make a donation in less than 30 seconds – from a smart phone, a tablet or a browser.

Engage Giving gives members or visitors the ability to create an account or log into their existing account, make a one-time immediate gift, set up a recurring gift schedule, maintain their payment sources, review any existing recurring setups, and finally to view a gift history, again from their web access point of choice – smartphone, tablet or browser. Engage Giving integrates seamlessly with a member’s Engage account, if the church offers Engage Member.
Setting Up Engage Giving


Set Short Name

Choose a short name for your URL. This should be brief and easy-to-remember. Short names are unique across all our users. Enter your organization's name. This will appear on the login page and at the top of Engage on the desktop version of the site.

Upload Logo

You may want to brand Engage with your logo for a more personal touch. Click Upload under the logo, select an image, and save. Please use an image with square dimensions.

Engage Giving Options

Set the Giving Memo text which appears on the email sent to the giver.

Select the payment type used on the contribution entry in CDM+. We suggest setting a separate payment type for online gifts. This is done in Contribution Setup in CDM+.

Enter staff email addresses to receive emailed notification of online giving activity. Multiple email addresses may be entered, separated by a comma.

Create Giving Sets and Select Giving Funds
Enter a new Giving Set name and click “Create Giving Set”

**Select Giving Funds**

Select the Giving Fund(s) to which gifts can be given. To select a fund, click on it. To deselect a fund, click on it again. If you wish, you may give a fund a different name on the Giving Tool than it has in CDM+.

**Engage Text Giving Setup**

If you also subscribe to Engage Text Giving, you must create the short code commands that donors will use to text a gift. You will also select the giving funds that are available through Engage Text Giving.

In this example, four giving funds have been selected and short code commands set up. The available giving funds are from those already set up in CDM+.

As the command is part of the text message sent by the donor, it is recommended that you keep these commands fairly short.

The command **REMOVE** is automatic and if texted to your Engage Text Giving phone number, will disconnect the mobile phone number from the donor’s Engage account.
Administering CDM+ Engage Giving

Administers can work with member/donor Engage Giving accounts within CDM+ itself. This allows church staff to

- Create Engage accounts for members (not covered in this class)
- Create one-time electronic donations for members
- Maintain member’s payments accounts
- Create and maintain recurring scheduled donations for members

This is done on the Giving Unit Record window.

Setting Administrative Access for staff CDM+ users

Open Administration on the CDM+ File menu.

Click “Select Individual”

Select an individual from the list, we suggest that you select the record of the user you are setting up.
In the Contribution Section of Permissions, set
- Schedule Recurring Contributions
- Modify Online Giving Notices
- Process Pending Gifts

In the Engage Section of Permissions, set
- User can administer Engage/WMT credentials
- Allow user to administer member giving

Administering Member’s Engage Giving Account

In CDM+ Contributions, the Giving Unit Record window now offers a new tab, Online Giving (#1). Selecting this tab opens CDM+ Engage Giving with the giving unit selected.

#2 – you may begin the process of creating an electronic gift, just as though the member logged into their own Engage Giving account.

#3 – other Engage Giving activities such as viewing scheduled gifts, managing payment accounts or repeating recent online gifts are available from the hamburger menu.
Using Engage Giving – Creating a Member Account

Members initially need to visit the church’s Engage Giving website using the browser on their computer or smart device. Once there, they have an option on the smart device to add this link to the Home screen of their device.

The Engage Giving website can be provided to prospective donors as a URL or as a QR code.

**As a URL:**

https://engage.suran.com/srh/s/login

**As a QR code:**

A QR code is simply a graphic representation of a URL. You can download a QR code directly from the Engage setup in WMT and share it on signs, bulletins, or anywhere you want to promote Engage.

When launched, the first thing the donor will notice is that Engage Giving is personalized, displaying your church name and logo, if uploaded, at the top of the screen.

If a member has already created an account in Engage Member (or in the old Giver’s Portal), the same username and password function in Engage Giving. Any and all stored payment accounts and recurring gift setups are available within Engage Giving. If they haven’t already created an account, they will need to create one in order to log in, save payment accounts and set up recurring gifts.

In order to create an account, a donor does NOT need to be in your CDM+ Membership Database. If the email address used during the registration process is not located in your CDM+ Membership Database, an Address, Individual and Giving Unit record will automatically be created and tied to the Engage account.

▶ Membership ▶ Address Records ▶ Giving Unit

Also, the Address Record for the Giving Unit must be complete, with a correctly formatted address and phone number. For an address to be complete, there must be a street address in at least one of the address lines.

A little work in your CDM+ database before or sharing the link to your Engage Giving URL or your Giver Portal tool will help make the login process go smoother for your members. We suggest you do the following:
**Clean up your Address Records**, checking that...
- All **Individuals** are linked to their **Giving Unit**
- **Addresses** have a street address

**Contact your givers** explaining...
- You must have a valid email address in their record if they want to use Engage Giving or the online Giver Portal.
- They will be able to securely view Giving History in addition to setting up recurring gifts.
- Their email address(es) will never be published without permission.

**Add and/or clean up email addresses**

**Creating a New Account – Members**

Your members will navigate to your Engage URL, and each person can create their own Engage account which consists of a Username and Password of their choosing. A valid email address is required. The on-screen prompts will direct them through the following steps. The process to reset a forgotten password is the same as setting the password when the account is created and is also covered below.

When a member wants to create a new account in Engage Giving, they will select **Create Account** link from the Engage login page.

The member will enter their email address and click **Register**. If there are multiple names linked to that email address in your CDM+ database, those names will be displayed and they will select their own name from the list.
The next prompt will ask the member to create a Username. This username will be used to login to Engage.

An email will then be sent to the email address entered. This email will contain a password code which is then used to set (or reset) the member’s password.

The member will either:

Click the **Reset Password** link in the email, or

Navigate to the URL provided in the email message and copy/paste the temporary password into the Password Code box and click **Check Code**.

The member will then create a new password and click **Submit**. They will be redirected to the Engage Giving URL.

**NOTE:** The member may reset an existing (forgotten) password simply by clicking the **Forgot Password** link on the Engage Giving login page and following this procedure.

**Creating A New Account – Visitors/Guests**

As mentioned above, to create an account, a donor does NOT need to be in your CDM+ Membership Database. If the email address used during the registration process is not already in your CDM+ Membership Database, the visitor/guest can still create an Engage Giving account. When the account is created in Engage, an Address record, Individual record, and Giving Unit record will be created in CDM+ and tied to the visitor/guest’s Engage account.
This capability is controlled by the Engage setup. Here the church may elect to allow or not allow the automatic creation of visitor/guest accounts.

Obviously, the benefit of allowing this is to allow visitors/guests to make and schedule recurring contributions without having to contact the church office.

When a donor whose email address is not in your CDM+ database creates an account in Engage Giving, they select the same Create Account link on your Engage Giving login page. The visitor/guest will also enter an email address and click Register.

Engage will alert the visitor/guest that the email address was not found and will prompt the person to Click here to create a new account.

Here, the account creation process differs from that faced by the member logging in for the first time.

For members, it is assumed that the member's mailing address is already in CDM+. For visitors/guests, Engage will prompt the donor to provide their mailing address. All fields are required.

After completing the required information, the visitor/guest will click Create Account.

The remainder of this process is the same for visitors/guests as that described for members on the preceding pages.
The visitor/guest is prompted to create a username. An email is sent to the visitor/guest at the email address provided with a link and a Password Code. The visitor/guest can click the Reset Password link, or he/she can copy/paste the URL provided into a browser and copy/paste the Reset Password Code and click Check Code.

The visitor/guest is then prompted to create a password for future use.

The visitor/guest with an Engage Giving account may reset an existing (forgotten) password using the Forgot Password link on the Engage Giving login page.

**Using Engage Giving – Making a Donation**

Engage Giving offers two different ways for a member or visitor to give – with or without logging into an account.

**Guest Giving (giving without logging in)**

Clicking the green Create a Gift button will open the “New Gift” entry screen.

Giving Funds selected by the church staff at the time of setting up Engage Giving are presented to the donor. (This selection process is described later in this chapter).

The member or visitor can choose one, multiple, or all Giving Funds for this gift.

The member or visitor will enter the desired amounts to the selected giving funds.

The member or visitor will enter the frequency of the gift. The default is once. Only those that have an account and log into their account can set a recurring frequency.

The member or visitor will enter the date of the gift. The default is today's date.

The member of visitor will click the green “Continue as Guest” button.
The next screen prompts the donor to enter their name, postal address, and email address. This screen also offers the donor the option to **Give Anonymously**.

For the recipient of the funds (you, the CDM+ user), there are important differences behind the scenes between “Giving as a Guest” or giving Anonymously.

Both Guest Gifts and Anonymous Gifts use the “Process Pending Gifts” function in CDM+ Contributions to link gifts to an existing giving unit, create a new giving unit, or link to a ZZVisitor type giving unit but

- ✔️ With an anonymous gift, the Billing name/address is NOT passed into CDM+ and the “Process Pending Gifts” process shows these as coming from an “Anonymous Giver.”
- ✔️ With a gift that is not anonymous, the giver's name, address, and email address are passed into CDM+.

The next screen offers the funding source – credit/debit card or bank ACH – whichever payment methods the church has opted to provide.

The billing information “Same as Giver” checkbox defaults to checked. If the giver unchecks this box, they are prompted to provide a separate billing address.

After completing the payment information – and the billing address if they unchecked “Same as Giver – the donor will click or tap **Continue**.
Before the gift is submitted, the giver is presented with a confirmation screen asking them to verify the information captured on the preceding screens.

On this confirmation screen, a gift memo box is offered where the giver can make any special notation about this donation.

If needed, the giver can click or tap the Back button to make changes.

Once satisfied with the details presented on the confirmation screen, the giver with click or tap Continue.

A Submit Gift pop-up window appears with two options: Cancel or OK.

To proceed with the donation, the giver will click or tap OK.

At this point, the gift is being processed. While it processes, three dots appear and move, indicating the process is working.

Once the gift has completed processing, the SUCCESS! Window appears. After clicking OK, Engage will ask the giver if they want to create an account. If the giver clicks Yes, they will be directed to create an account as described above. Engage will use the email from the gift to attempt to match the giver to an existing record in your CDM+ database. If a new record is created, Engage will use the address information from the gift to create the new record. In either event, the payment information and gift will be linked to the new account. Once logged in.

If the giver bypasses account creation they will have an option to Print Receipt or make a new gift.
Sign In to Give – Donor Has (or will create) An Engage Giving Account

The donor will enter a username and password and click **SIGN IN**. Note that the donor can also create an account or request a password reset from the login screen.

The **New Gift** entry screen appears.

Again, the Giving Funds selected by the church staff are presented. The member or visitor can choose one, multiple, or all Giving Funds for this gift.

The member or visitor will enter the desired amounts to the selected giving funds.

The member or visitor will enter the frequency of the gift. The default is once but may be changed to one of several common frequencies. The donor will open the dropdown menu to select a different frequency.

The member or visitor will enter the date of the gift. The default is today's date, but the donor can schedule the gift for a later date.

When satisfied with the entries on this screen, the donor will click the green **Continue** button.
The next screen allows the donor to select the funding source. All stored funding sources are available with the most recent account used selected by default.

The donor may select a different funding source by clicking on the dropdown menu and choosing a different payment account.

The donor may add a new funding source by clicking Create New Account above the dropdown.

For whichever account is selected, the funding source details are displayed. When the donor is satisfied with the choice of a funding source, he or she will click or tap Continue.

Next, the donor is presented with a New Gift confirmation screen containing the information entered – payment information and the details of the gift.

A gift memo box is offered to make any special notation for this gift.

The donor may click or tap the Back button to make changes, or the Submit Gift button to proceed.

A final Submit Gift confirmation screen appears. The donor will click the Cancel button to exit or the OK button to proceed. Once the donor clicks the OK button, the gift is being processed. While it processes, three dots appear and move, indicating the process is working.

Once the gift has completed processing, the SUCCESS! Window appears. Clicking OK displays a gift summary window, again providing the details of the gift and offering a “Print Receipt” button at the bottom.
Regardless of which giving method is used, two emails are sent immediately. One, a standard receipt, is emailed to the donor at the email address used or linked to the account. The second email is sent to a staff email address advising that an online gift has been received or a recurring gift has been established.

Additionally, a third email is sent from Stewardship Technology (SST) to the donor as SST processes transactions. That means this email will be sent each time a recurring gift is fired through Stewardship Technology.
Other Options Available in Engage Giving When Logged In

When logged in, opening the hamburger menu in the upper right displays several additional options.

**Make a gift** – see prior pages.

**Scheduled Gifts** – shows two tabs – Pending/Active and Historical

**Pending Gifts** are those that have been created but not yet processed.

**Active Gifts** are those that have been created and processed at least once and which are scheduled to process again.

**Historical Gifts** are those that have been processed and will not process again.

- Example 1 – a one-time gift given last week is historical
- Example 2 – a one-time gift given today would be pending
- Example 3 – a recurring gift scheduled as monthly for 6 months will show as Active during those 6 months but as historical after the 6 months.

**Recent Online Gifts** displays the last several gifts that have been made with an option to Give Again. If **Give Again** is selected, the gift confirmation window opens for the donor to confirm the gift.
Giving History - displays a rolling 12 month history of the member’s giving, both in-church and online.

Accounts – displays existing funding accounts, credit/debit cards and bank accounts. The member may add new accounts or delete existing.

One account, either credit/debit or bank account should be set as the Primary account. The Primary account is required for Engage Text Giving.

Profile – select the email address where gift confirmation should be sent and edit your phone number for text giving.
**Electronic Banking**

Suran Systems, Inc. has partnered with a merchant account processor, Stewardship Technology, Inc., to allow CDM+ users to accept debit and credit card (VISA, MasterCard, American Express and Discover) payments. Also through Stewardship Technology, users can do bank drafts and perform ACH transactions. These electronic transactions are done online via CDM+ Web Ministry Tools or individual transactions can be processed through the Payment Administration section of the Web Ministry Tools website.

A Stewardship Technology merchant account is required for electronic banking in CDM+. Application is made through CDM+/Suran Systems, Inc. An application checklist, the list of required documents, and a fee schedule for merchant account services are included at the end of this chapter. For a complete merchant account application form, please contact the CDM+ Sales Department at 877-891-4236 or sales@cdmplus.com.

CDM+ provides full integration of electronic banking from detailed transactions such as online contributions and registrations made through CDM+ Web Ministry Tools to deposit processing of revenue and expenditures of fees. This integration reduces errors and minimizes the amount of bookkeeping required to handle electronic transactions.

**User Access**

➤File ➤Administration ➤Users

To allow a person to access the Process Pending Gifts window, you must check the box next to Process Pending Gifts under Contributions. Note: scroll down on the window to view all user access settings.

![User Access](image)
Under the Accounting on the Users pane of the Administration window there is a Deposit Processing checkbox to control who can perform this function.

**File ▶ Administration ▶ Users**

![Image of a screenshot of the Administration window with a Deposit Processing checkbox highlighted.]

**Setting Up Accounts for Income and Fees**

**Online Giving Tool**

**Program ▶ Contributions ▶ Contributions Setup ▶ Giving Funds**

![Image of a screenshot of the Giving Funds window with accounts listed.]

The account number where you want the merchant fees to be charged against is entered on this window. This could be an expense account or it could be the income account so that the revenue is net of the amount received.
Enter the account number where you want the merchant fees to be charged on the Event Record. This could be an expense account or it could be the income account so that the revenue is net of the amount received.

**Engage Billing**

Select the fee account where merchant fees will be debited. If using a surcharge, select the income account to receive those funds.

**Process Pending Gifts**
The Process Pending Gifts window displays all single gift online contributions that have not been processed. Gifts made through Engage Giving or the Giver Portal do not show up in Process Pending Gifts; those gifts are credited directly to the giver’s Giving Unit Record. There are three status options for processing gifts.

1) No Giving Unit Selected (red dot)
2) Giving Unit Selected (yellow dot)
3) Ready to Process (green dot)

Initially, all gifts will either be the first or second option. CDM+ will attempt to match an incoming gift to an existing Giving Unit record in CDM+. If it can, that gift will have a yellow dot. If it cannot, the gift will have a red dot.

When you select a gift that CDM+ cannot easily identify the source (red dot), you can either select a Giving Unit or create a new one. Selecting an existing Giving Unit is the same as in Contributions Entry—either type in part of the name or click on the List button. Once the gift is tied to a Giving Unit, it will be marked with a yellow dot.

CDM+ displays the Pending Giver (which is the information entered by the giver online), the pending gift(s) designation and any special instructions that were entered online on the right side of this window.

Only those gifts that you have marked as Ready for Processing (green dot) will be processed when you click the Save button. To Mark for Processing, highlight a gift and either press Cmd-K (Mac) or Ctrl-K (Windows) on the keyboard or click the Mark for Processing button on the top of the window.

When gift is Marked for Processing and saved, the contribution becomes part of the giver’s giving record. All gifts processed from this window can be viewed from the Contribution Records Window.

Note that the Deposit date and Asset information is blank. This will automatically be supplied when the Deposit Processing functions are completed. CDM+ has marked the source of this contribution as Online Giving. Users can generate any standard Contribution report using this source. This allows for easy understanding of the giving patterns and source of online contributions.
Event Registration Payments

Payments for events made online automatically show up on the Payments tab. CDM+ stores the transaction ID from Stewardship Technology with the payment. The source should read Web Ministry Tools. Credit card numbers will only show the last four digits of the card used.

Deposit Processing

All deposits made to your bank account are listed on the left side of the window. When you select a deposit, the top list on the right displays the actual online transactions that make up that deposit. These may be from different days and be a mix of contributions, online registrations or manual merchant transactions. The lower list on the right displays the account number breakdown including fees. A deposit marked yellow simply needs to be reviewed and then marked for processing by pressing cmd-k (Mac) ctrl-K (Windows). Deposits in red indicate missing account numbers. Missing account numbers can be from the income or fee side of the setup.
Missing account numbers can be corrected on this window. Click on a line with a red dot on the list on the left. Transactions with missing account numbers will show on the right side in Red. By double-clicking on the red dotted lines you can supply the appropriate account numbers. CDM+ will also then correct the setup windows related to these transactions and any others that make up this deposit.

When all deposits have been Marked for Processing, click on Continue to post these transactions to your Ledger. A preliminary Deposit Processing Posting Report will be generated to the screen with a Post button active. Click on Post to continue.
Go to the Ledger Entries window to view processed deposits. The source of all deposit processing will be listed as Stewardship Technology.

When a Web Ministry Tool that uses Electronic Banking is activated, the Stewardship Technology merchant account credentials are automatically updated in CDM+. Only the asset account to which the monies are deposited needs to be entered by the user.
Payment Administration

►https://wmt.suran.com ►Payment Administration

Log into your Web Ministry Tools account and click on the Payment Administration button at the top of the window. Here you can search transactions records, charge credit cards or bank accounts, and refund recent transactions.

Search Transaction Records

Click on Search Transaction Records at the top of the window, enter a date range, and click Search.

Click on the red Transaction Reference Number in the list to see the detail of a transaction.
Refunding a Transaction

If the transaction detail shows YES next to Is Refundable, you can issue a refund, such as for a duplicate charge made in error, by clicking the Refund Transaction button.

Click the Close button. Note the status of the charge now shows as Refunded on list of transactions.

If the charge is not refundable, the Refund Transaction button will not appear. Transactions older than 120 days may not be refunded.

Create a One-Time Charge

You can also charge a card or a bank account from the Payment Administration window. Click on the Create One-Time Charge button at the top, enter the amount, an optional memo and billing name and address. Click either Credit Card…
Here's what you'll need to apply for a merchant account for use with CDM+ Web Ministry Tools that accept online payment...

Non-Profit Merchant Application

For more information or questions regarding this application please call (877) 881-4CDM.

Organization Name: ____________________________ Date: ________

Application Checklist: Please include the following documents with the completed application

☐ Please complete the application, we cannot process incomplete applications.
  ☐ Complete Application Form (Page 2)
  ☐ Initials on each page of the Terms and Conditions (Pages 3-5)
  ☐ Signed Signature Page (Page 6)
  ☐ Initials on Exhibit A - Fee Schedule (Page 7)

☐ Exhibit B - Additional Required Documents

To complete the application form, you'll need:
Church/Organization PHYSICAL ADDRESS & other info, personal info & signature/initials of Principal (someone authorized to enter into agreements), routing & account numbers of bank account you want funds deposited in.

Drivers licenses should be copied or scanned in COLOR and ENLARGED 200%. Or just take a close-up high-resolution photo with your phone!

You do not need to supply BOTH the IRS 501(c)3 letter & Articles of Incorporation, but you MUST include one of them.

☐ IRS 501(c)3 Determination Letter
☐ Articles of Incorporation
☐ D.B.A. Certificate (if applicable)  
D.B.A. = Doing Business As (Using a different name than on either of the above documents.)
☐ Include a copy of a valid Drivers License for all Principals listed in the agreement.
☐ Attach a voided check from the account to be used for the settlement of funds.

☐ Other Document (Not required for all organizations)

Required for Organizations who process over $50,000.00 in transactions per month, those applying for ACH Credit transaction capability, or those who are High Risk as determined by the processor.

☐ Last 2 Months Bank Statements

Fax or Mail the completed application and supporting documents to:

Fax: (270) 282-4231

CDM+ Church Management Software
PO Box 603
Versailles KY 40383-0603
www.cdmplus.com
877-891-4CDM

The application & supporting documents can also be scanned & emailed to: customerservice@suran.com

Note! The merchant account application must be submitted & approved BEFORE you can begin to create Web Ministry Tools that require payment.
### EXHIBIT A - FEE SCHEDULE

**Organization Name:**

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**ACH and Credit Card Settlement Terms**

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**ACH Rates and Fees**

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**Credit Card Rates and Fees**

**Credit Card Rates and Fees for Legal U.S. Non-Profit and IRS declared 501(c)(3) or similar organizations only.**

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* Fees Subject to Change pursuant to section 16.2 Amendment to Fees and Charges of the Terms and Conditions.
† Subject to approval. Excessive ACH Returns, Credit Card Chargebacks, large ticket transactions or other factors as determined by Stewardship Technology may affect Settlement Terms.
‡ Deposits made Monday through Friday excluding federal banking holidays. Any deposit scheduled for a weekend or a federal banking holiday will be submitted the next regular banking business day.
§ Credit Card acceptance subject to terms and conditions imposed by the credit card issuer, processor, and/or bank. Adherence to PCI DSS Standards required. Credit Card Discount Rates subject to acceptance by credit card issuer. Actual rate may be different than listed Discount Rates as determined by the credit card processor. Non-profit is responsible for all fees associated with each credit card transaction. Discount Rates and Fees may be adjusted annually.
¶ Subject to separate approval by American Express. Rate may be adjusted if determined as ‘High Risk’ by American Express. Allow approximately 2 weeks for approval and account setup by American Express.
∥ Account Updater. Active MasterCard and Visa accounts will be submitted to their respective issuer for update within 45 days of the accounts expiration. An active account is defined as a MasterCard or Visa account that is currently being used by an active recurring transaction or a MasterCard or Visa account that has been used in the last 90 days. Submission of an account for update is no guarantee that the issuer will return corrected information nor that future transactions will be Approved.

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