



## Version 4 to 5 Upgrade Instructions for



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Please review our update [Brickwork User Guide](#) for details on how to use the new Batch features which were released in Version 5.

If you have any questions about these features or the below configuration instructions, please reach out to iATS Customer Care at [iatscs@iatspayments.com](mailto:iatscs@iatspayments.com) or 1.888.955.5455.

## 1 Confirm that Version 5 is already installed in your org

Ensure your version of Brickwork was automatically updated for Version 5.

1. In Set-up use quick find and search for Installed packages.
2. Locate "iATS Payments" from the Package list. The Brickwork version number will appear under the Version Number column.

If you are on an older version of Brickwork, please visit the [App Exchange page](#) to download the latest version manually.

## 2 Activate newly added Remote Site setting

This version comes with a new remote site that needs to be activated manually for security reasons when an automated push release occurs. Please follow these instructions to activate the 'First\_Pay\_Gateway' remote site:

1. In Setup, use Quick Find to search for Remote Site Settings.
2. Locate First\_Pay\_Gateway, and click the Edit button.
3. Click the Active checkbox, and click Save.

## 3 Update Brickwork NPSP Recurring Donation Extension to latest version

We've released a new version of the NPSP Recurring Donation Brickwork extension to allow for the new batch tools to integrate with the NPSP.

1. [Visit our website](#) and scroll down to the Brickwork Add-On Extension Links section.
2. Right click on the "Nonprofit Success Pack 'Recurring Donation' extension package" link and copy the link details.
3. Open a new browser window and paste the link into the URL bar, and click enter.
4. Log in using your Salesforce credentials and follow the prompts to update the package. We recommend updating for all users, not just Admins.

## 4 Modify Existing Page Layouts

To view the new fields that have been added for batch import and single transaction processing, you need to modify a few of the existing page layouts.

### 4.1 iATS Merchant Account

1. Via the Setup page, use Quick Find to search for the Object Manager (Lighting users) or the Objects section.
2. Click on the iATS Merchant Account object, and open the page layout editor. There should be only one page layout.
3. Within Fields, add the "Direct Debit Processor" field onto the page layout.
4. Save.

No changes need to be made to the field's value and can be left blank.

## 4.2 iATS Customer Code

1. Via the Setup page, use Quick Find to search for the Object Manager (Lighting users) or the Objects section.
2. Click on the iATS Customer Code object, and open the page layout editor. There should be only page layout.
3. Create a new section on the page layout called “Batch Processing Details”, we recommend putting it at the bottom.
4. Add the following fields to the new section:
  - Include in Next Batch Update Process
  - Last Batch Update Date/Time
  - Last Batch Update Status
  - Last Batch Update Failure Details

Batch Processing Details	
Include in Next Batch Update Process <input checked="" type="checkbox"/>	Last Batch Update Date/Time 26/09/2017 8:35 AM
	Last Batch Update Status Sample Last Batch Update Status
	Last Batch Update Failure Details Sample Last Batch Update Failure Details

5. Modify Field History. We recommend that you add field history tracking to the “Include in Next Batch Update Process” and “Last Batch Updated Date/Time” fields.
6. To improve user experience with our new batch feature for updating existing donors schedule and details, we **HIGHLY** recommend updating the help text for most of the fields on the object. We are unable to push these changes to you during the automated update unfortunately due to Salesforce limitations.

Update the help text for the following fields:

Field Label	New Help Text
<b>ACH/Direct Debit Account Number</b>	Last 4 digits of ACH account number. This field can only be edited using the iATS Button for security reasons. The iATS Batch Entry Update process cannot update this field.
<b>ACH/Direct Debit Account Type</b>	Used to define Checking or Savings for North American ACH/EFT bank accounts. Direct Debit clients using iATS Batch Update Process should enter Savings for Direct Debit.
<b>Credit Card Expiry Date (MM/YY)</b>	Please enter the date in the following format MM/YY. Only future dates are accepted.
<b>Credit Card Number</b>	Display's the last 4 digits of credit card. This field can only be edited using the iATS Button for security reasons. The iATS Batch Entry Update process cannot update this field.
<b>Credit Card Type</b>	Used to define the CC brand. Enter either Visa, MasterCard or MC, American Express or AMX, Discover or DSC.
<b>Direct Debit Reference Number</b>	Applicable for iATS Accounts that utilize UK Direct Debit processing with iATS. The Reference number is the donors unique number associated to their DD Instruction (DDI).

<b>Direct Debit Registration Error</b>	Applicable for iATS Accounts that utilize UK Direct Debit processing with iATS. The Reference number is registered with BACS via our UK acquirer Smart Debit. Should indicate a successful status or an error. See Status field for more information.
<b>Direct Debit Registration Status</b>	Applicable for iATS Accounts that utilize UK Direct Debit processing with iATS. The Reference number is registered with BACS via our UK acquirer Smart Debit. Should indicate a successful status or an error. See Error field for more information.
<b>iATS Merchant Account</b>	DO NOT EDIT. The merchant account that has been issued by iATS payments. This is used to process recurring transactions associated to this Customer Code.
<b>Method of Payment</b>	Method of payment must be CC or Credit Card, ACH, or Direct Debit. ACH is used by North American clients. Direct Debit is used by UK GBP clients.
<b>Recurring Payment Amount</b>	The value that will be charged to the donor on a recurring basis.
<b>Recurring Payment Begin Date</b>	This field defines the first date iATS should process a transaction for the donor. Used to assign Schedule Date for Annual and Quarterly schedules.  For UK Direct Debit this date must be at least 12 days in the future.
<b>Recurring Payment End Date</b>	This field is required by iATS and must be defined. If there is no true end date for this recurring schedule, enter any future date, such as 50 years in the future. This field is used to calculate the NPSP Non-Open ended donations.
<b>Recurring Payment Schedule Date</b>	Applicable for 'Weekly' and 'Monthly' Schedule Types only. For Weekly please use the following format: '1' for Sunday, '2' for Monday, '3' for Tuesday, '4' for Wednesday, '5' for Thursday, '6' for Friday and '7' for Saturday. N/A for 1st Pay & Rapidata.
<b>Recurring Payment Schedule Type</b>	This field defines the schedule on which the donor will be charged. Use only Weekly, Monthly, Quarterly, Annually as values. Case sensitive.  Weekly is not available for Rapidata UK Direct Debit merchant accounts.
<b>Recurring Payment Status</b>	This value indicates the status of the recurring schedule. Only use Active or Inactive values.  For UK Direct Debit donors, changing this field and running the Update Customer Code Batch Process to Off will cancel their DDI with BACS.

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## 5 Add New Objects to the Brickwork App

To allow your users to view our new objects, we recommend amending the Brickwork App to display the new tabs, iATS Batch Entries and iATS Log. This will make using our new batch processing features even easier.

### Lightning Users:

1. Within Setup, use Quick Find to search for App Manager.
2. Locate the iATS Brickwork Lightning app.
3. Click Edit via the dropdown on the far right side.
4. Click Select Items, and add iATS Batch Entries and iATS Log if not already included.
5. Click Done.
6. Repeat for the Classic app.

### Classic Users:

1. Within Setup, use Quick Find to search for Apps.
2. Locate the iATS Brickwork app. Click Edit.
3. Add iATS Batch Entries and iATS Log to the list of Selected Tabs.
4. Click Save.