



Installation and Configuration Guide for



Brickwork Version: 5+

Created: September 2017

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1 iATS Payments Contact Information

North America: www.iatspayments.com

UK/Europe: www.uk.iatspayments.com

Customer Care:

Email: iatscs@iatspayments.com

Phone: North America: 1.888.955.5455 | UK/Europe: 0808.234.0466

Hours: 7:30am – 5:00pm Pacific Standard Time, Monday to Friday

Sales and Marketing:

Email: sales@iatspayments.com

Phone: North America: 1.866.300.4287 | UK/Europe: 0808.234.0466

Hours: 6:00am – 4:30pm Pacific Standard Time, Monday to Friday

2 Brickwork Overview

Brickwork is a free native application that supports one-time and recurring Credit Card, ACH, and Direct Debit transactions via an integrated virtual terminal called the iATS Button, as well as includes a free online donation form called Aura. Using Brickwork eliminates the hassle of manual data entry by securely capturing payment information and dynamically updating your organization's Salesforce environment.

Key Features:

- Integrated Virtual Terminal for processing single donations and setting up recurring donations
- Free online donation forms included called Aura
- Batch Import support to mass processing single transactions, creating new recurring donor schedules, and updating recurring schedule details
- Brickwork integrates seamlessly with the Nonprofit Success Pack (previously called the Nonprofit Starter Pack)
- Can be used with most editions of Salesforce, Enterprise, Unlimited, Force.com, Developer, Performance
- Supports payments for all major credit card brands, ACH in North America, and Direct Debits in the UK
- Fully PCI compliant
- FREE industry-leading Client and Partner support
- Multi-Currency enabled
- Full support for English and French languages
- Gift Aid support
- Auto-Imports for Direct Debit BACS Reports
- Full Contact Match features to eliminate duplicate records

As a Level 1 Payment Card Industry (PCI) certified company, iATS Payments ensures all transactions are handled with absolute security.

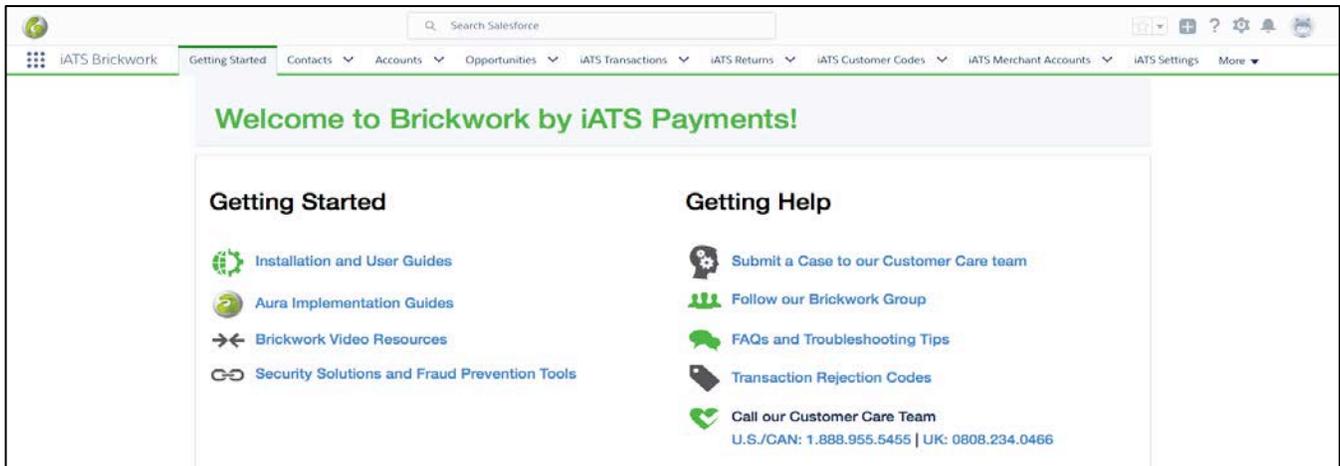
For more information on Brickwork processing best practices and how Brickwork functions please refer to the [Brickwork User Guide](#) which can be downloaded by clicking [here](#).

Please also take a look at our Brickwork Video Series, found [here](#).

3 Custom Objects and Features of Brickwork

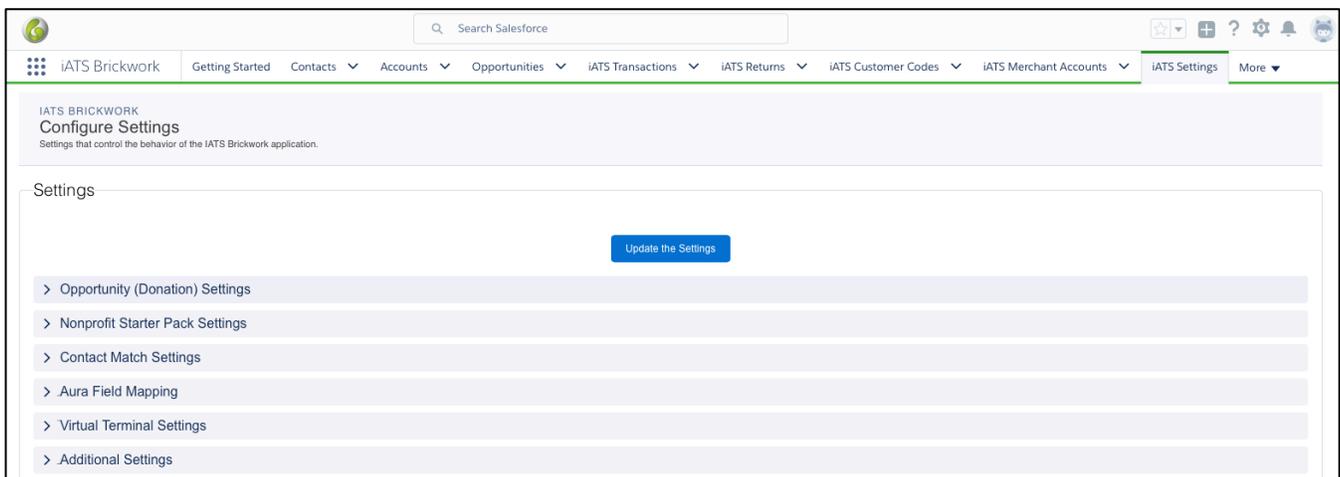
Getting Started with Brickwork

To help get you going, we've put together a helpful page of resources in the new Getting Started tab. Here you are able to download the latest versions of our installation and user guides, contact our Customer Care team, and review FAQ's, tips, reject reason codes, and more. Check it out!



iATS Settings

The iATS Settings tab is where all customizations are configured (tell your unique Salesforce environment how the IATS Button and Aura online donation transactions should be handled by Brickwork) and how your organization is using the Nonprofit Success Pack (NPSP).



Language Translation

Brickwork is fully compatible with both English and French user language settings. To enquire about adding a new language to meet your organization's needs, please [contact](#) iATS Customer Care.

Recurring Payments *with or without* the Nonprofit Success Pack

Brickwork is fully integrated with the NPSP's Recurring Donation object, as well as the Payments record on Opportunity Donations. Most of our clients use Brickwork with the NPSP Recurring Donation (which is what we recommend), however you can decide between a few different options for tracking your recurring transactions with iATS Payments.

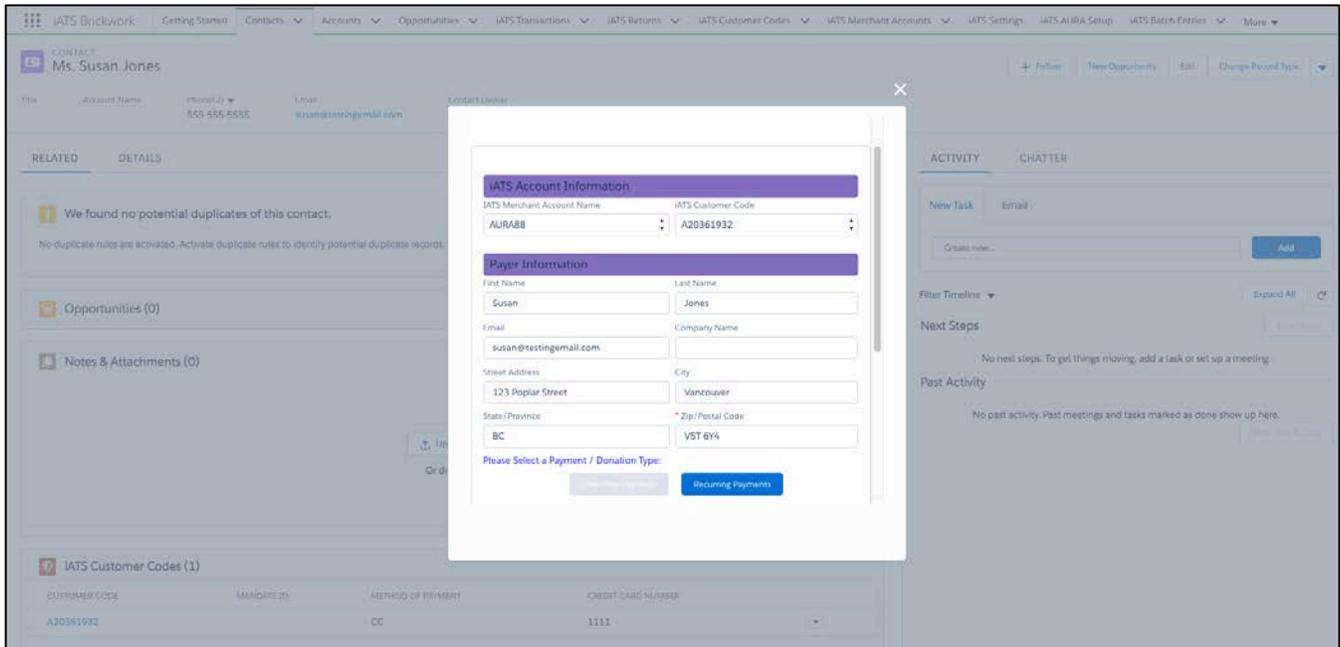
Here's an overview of what each option is and how you can expect to see your transaction information:

- 1. NPSP Recurring Donation Integration (Recommended):** This option connects Brickwork to the NPSP Recurring Donation object, and its related Donation records. Using an iATS Customer Code, all schedule details are synced between Salesforce and iATS Payments allowing for transactions to be automatically processed on the defined date you or the donor has selected. Brickwork will auto-import all transactions that have been processed and relate them to the correct Donation record. In addition, when the transaction was processed successfully Brickwork will change the Stage of the Donation from Pledged to Posted for you so you'll know your reporting and roll-ups are always accurate. If the transaction was declined, we'll change the stage to the closed/lost option you define. To take advantage of this option, you need to download the Brickwork Recurring Donation extension as part of the installation process. We recommend using the NPSP version 3.
- 2. NPSP Payments Integration:** This option connects Brickwork to the NPSP Payment object directly, which allows for multiple Payment records to be created on a single Opportunity record. This is a Brickwork custom option that was developed for those customers who historically didn't want to use the Recurring Donation object. While it's still possible to use this option today, we do recommend using Recurring Donations instead. If chosen, all schedule details are synced between Salesforce and iATS Payments allowing for transactions to be automatically processed on the defined date you or the donor has selected. Brickwork will auto-import all transactions that have been processed and relate them to the correct Payment record on the Opportunity. In addition, Brickwork will mark the payment record as "Paid" when the transaction is successful. To take advantage of this option, you need to download the Brickwork Payments extension as part of the installation process. We recommend using the NPSP version 3.
- 3. Non-NPSP Brickwork Standard Option:** When Brickwork is installed this is the default option for recurring payments. We highly recommend using the NPSP in order to take advantage of it's amazing Nonprofit specific features, however it's not required for Brickwork. If your organization makes the choice to stick with a standard Salesforce environment Brickwork will utilize the Opportunity record and our own custom object iATS Transactions. You won't be able to do fancy future forecasting like you can with the NPSP Donation record, but all transaction information will be imported. With this option, iATS Customer Codes schedule details are synced between Salesforce and iATS Payments allowing for transactions to be automatically processed on the defined date you or the donor has selected. Brickwork will auto-import all transactions that have been processed and relate them to the correct Opportunity record.

To watch our video on the Brickwork Recurring Payment options, [click here!](#)

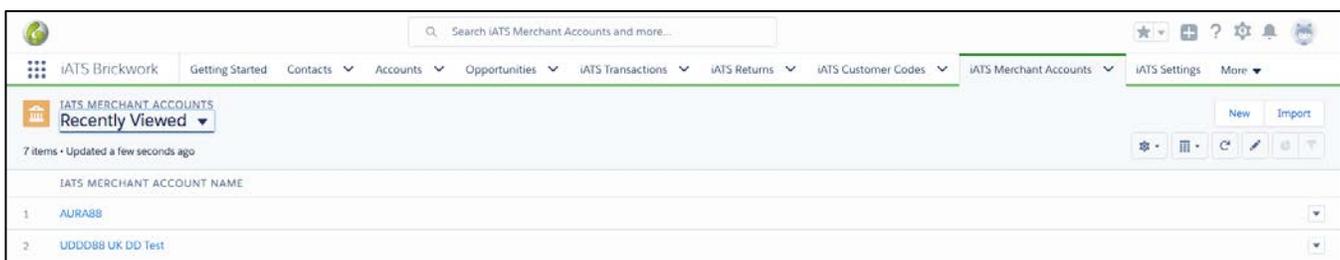
Brickwork iATS Button

Also known as the iATS Button, the Brickwork Virtual Terminal is used to charge Single Credit Card or ACH transactions, schedule Recurring Credit Card or ACH/Direct Debit transactions, and to update stored payment or recurring schedule details within an iATS Customer Code. You can also swipe credit card numbers using a portable USB card swipe!



iATS Merchant Accounts

iATS Client Codes and passwords are stored as iATS Merchant Accounts, which replaces the need for traditional Merchant numbers you have received from other processors in the past. To get started setting up your iATS merchant credentials, please contact us at sales@iatspayments.com.

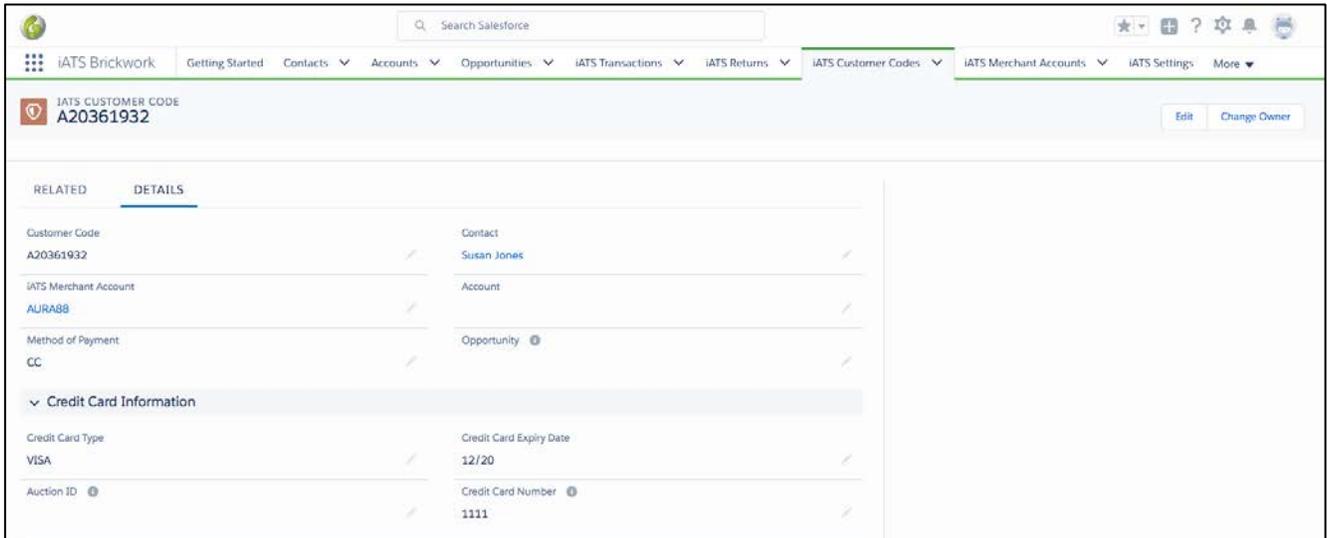


Multi-Currency Integration

Brickwork is fully compatible with the Multi-Currency features of Salesforce. For more information on how to choose a Multi-Currency option, please visit [Salesforce Help](#).

iATS Customer Codes

iATS Customer Codes are records that represent the encrypted stored payment information and recurring schedule details for the donor. These full encrypted details are securely stored within the iATS servers. The Brickwork iATS Button can be used to create these tokens, and make any necessary edits in the future.

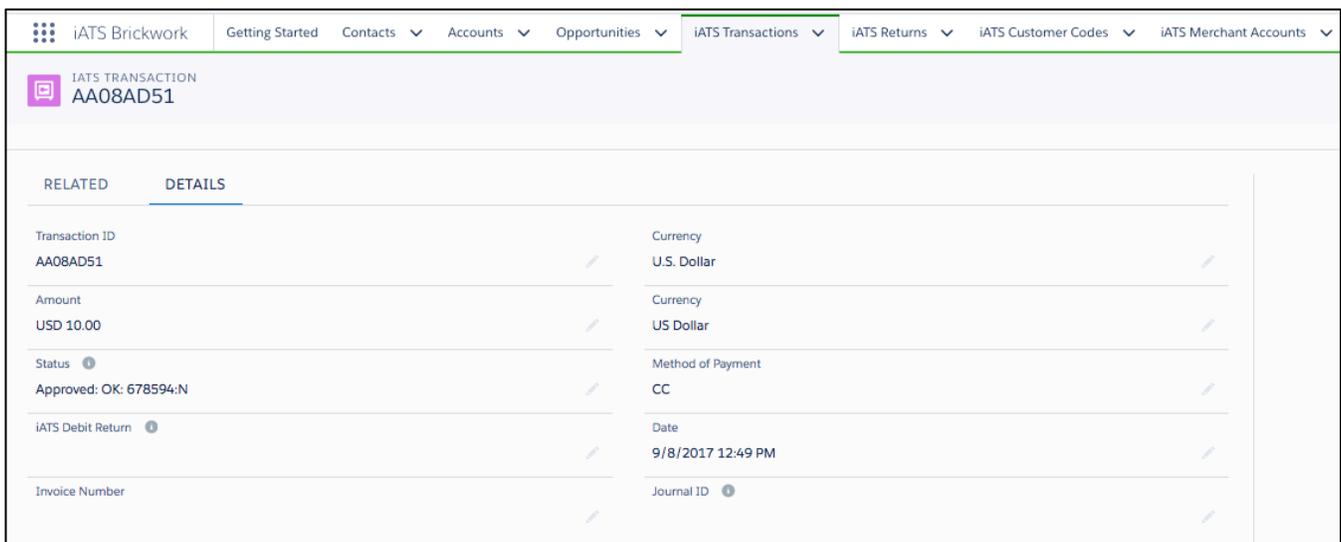


The screenshot shows the Salesforce interface for an iATS Customer Code record. The record ID is A20361932. The details are as follows:

Field	Value
Customer Code	A20361932
Contact	Susan Jones
iATS Merchant Account	AURAB8
Account	
Method of Payment	CC
Opportunity	
▼ Credit Card Information	
Credit Card Type	VISA
Credit Card Expiry Date	12/20
Auction ID	
Credit Card Number	1111

iATS Transactions

iATS Transactions are individual Credit Card or ACH/Direct Debit transactions which have been processed via your iATS merchant account. Each iATS Transaction has a unique Transaction ID and contains details pertinent to the charge such as Approval or Rejection status and the Date & Time.

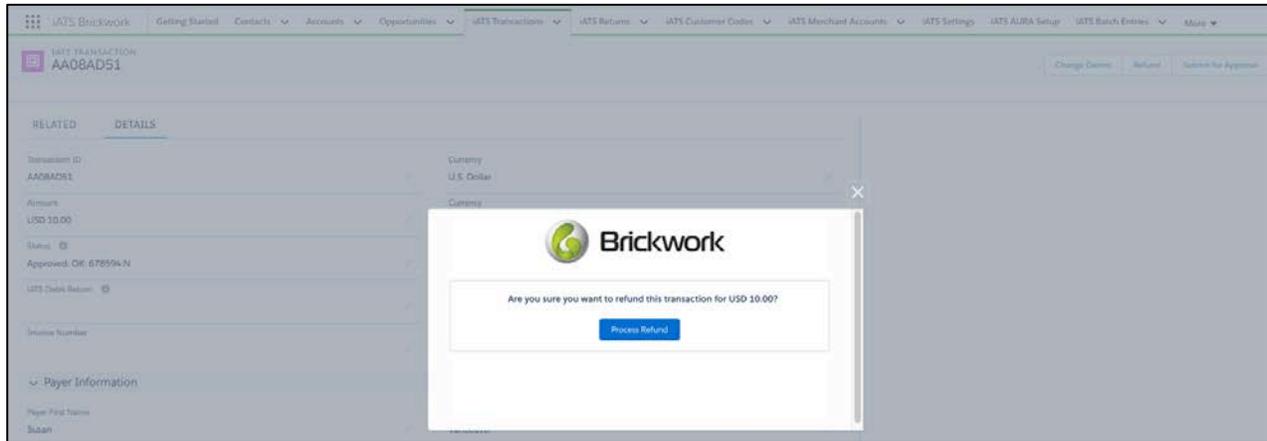


The screenshot shows the Salesforce interface for an iATS Transaction record. The record ID is AA08AD51. The details are as follows:

Field	Value
Transaction ID	AA08AD51
Currency	U.S. Dollar
Amount	USD 10.00
Currency	US Dollar
Status	Approved: OK: 678594:N
Method of Payment	CC
iATS Debit Return	
Date	9/8/2017 12:49 PM
Invoice Number	
Journal ID	

Refund Transactions

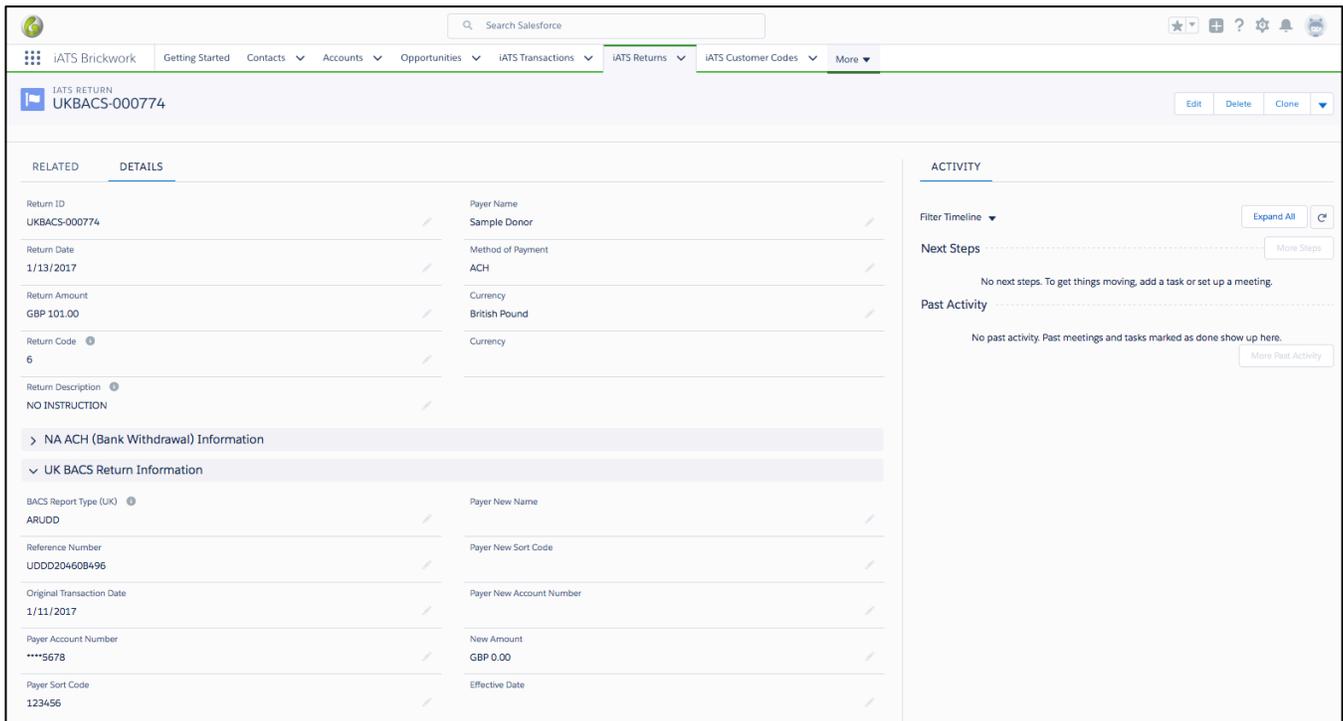
Full credit card Refunds can be processed using the Refund button on the specific iATS Transaction you need to credit.



iATS Returns for ACH and UK Direct Debit Transactions

iATS Returns are records which are automatically imported from iATS Payments to Salesforce via the Nightly Download Journal Import process, providing visibility into returned ACH and UK Direct Debit iATS Transactions.

A “return” is when a donor’s payment is cancelled by their bank, for reasons such as Insufficient Funds, or Bank Account Closed, etc.



Nightly Download Journal Import

Download Journal Import feature automatically retrieves transaction information from the iATS systems. This process ensures all iATS Transactions are added to your Salesforce environment, including recurring and single donations. In addition, UK Direct Debit BACS reports are imported using this feature.

This process is scheduled daily as one of the app configuration steps your Admin will undertake, but it can also be run manually if needed via the iATS Settings tab. Email notifications are sent out each day to provide details on the success of the import.

Batch Download Transactions

Allows you to download transactions from iATS that may not have been previously entered into Salesforce. Note that UK Direct Debit Returns will only be completed for the begin date.

* Begin Date: 9/8/2017

* End Date: 9/8/2017

Continue Cancel

For more information on how the Download Journal process works, please refer to the visual diagrams within this guide.

Batch Import Features

Mass creations of recurring payments, updates to recurring schedules, and single transaction processing is now available in Brickwork!

Our Batch Entry and Update features allows you to import a file into Salesforce and communicate directly with iATS Payments. You can create iATS Customer Codes, NPSP records like Recurring Donations, and iATS Transactions for processing payments in real time as well as perform mass updates your existing recurring schedules, for example to change the amount being charged to each donor, or change the scheduled date.

Our import tool includes options for relating new records to existing donors and campaigns, as well as utilizing specific record types. A history log and email notifications are also included!

Batch Payment Processing

Batch processing allows you to mass create iATS Transactions, iATS Customer Codes, Contacts, Opportunities, NPSP Payments, and NPSP Recurring Donation records. It can also be used to mass update iATS Customer Code records and processing single donation batches. Please review the iATS Brickwork User Guide for more information which can be found on the Brickwork Getting Started page.

Settings

These field selections will be used as the default value when processing a batch where values aren't defined per that specific batch, such as the iATS Merchant Account used to process the transactions.

iATS Merchant Account: test88 na

Campaign: tester Item Donors

Contact Record Type: --None--

Opportunity Record Type: DD Donations

Recurring Donation Record Type: --None--

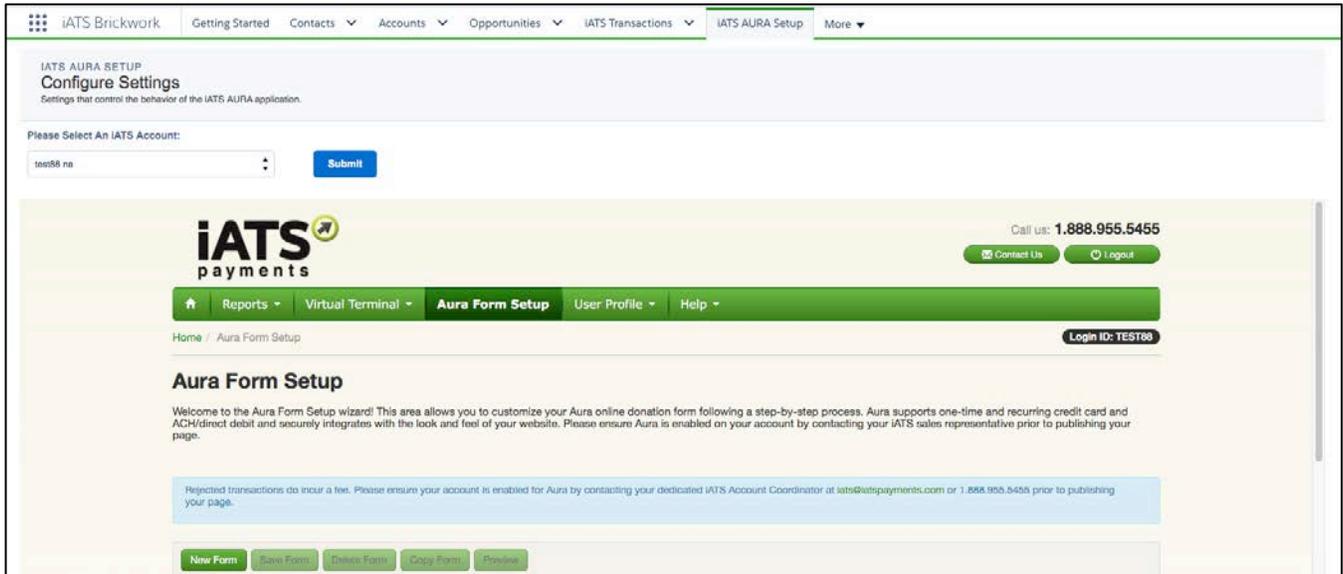
-There are 0 batch entries waiting to be processed
-There are 0 customer code records waiting to be updated

Last Run Details: 1 out of 1 iATS Batch Entry records were successfully processed on September 08, 2017. Please review the iATS Log for additional details.

Process iATS Batch Entries Process iATS Customer Code Updates

Online Donation Form Integrations (Aura by iATS Payments or Form Assembly)

Accept donations on your website using our online donation form builder [Aura](#), or with our partner Form Assembly! Aura, and our API version AuraLink, makes accepting online donations easy and programming knowledge is not necessary! Aura and AuraLink have built-in integration with Brickwork using a Salesforce site to ensure that all online transactions are imported into Salesforce automatically.



With Form Assembly's iATS Connector, you can easily process one-time credit card payments, set up recurring credit card payments through subscriptions, process ACH or Direct Deposit payments, and create new records in Salesforce iATS Brickwork. For more information on how to use the Form Assembly iATS Connector with Brickwork, please refer to our instructions in this document and from [Form Assembly](#).

Campaign and Record Type Integration for Aura

Online Aura form processing can be customized to use specific Record types for Contacts, Opportunity and Recurring Donations, or be related to specific Campaigns within Salesforce. Campaign ID's and Contact and Opportunity Record Type ID integration can be added to your Aura donation form in three different ways to provide maximum flexibility. For complete instructions on how to associate Aura online processing to Campaigns and assign Record Types, please see the "Integrate Aura online processing with Campaign ID's and/or Record Types" section of this guide.

iATS Universal Postback for Partner Online Donation Forms

The iATS Universal Postback feature allows our Partner's online donation processing to flow seamlessly to your Salesforce environment via Brickwork! This means that now you can connect your third party app like a Form Assembly Donation form to iATS for processing, but also take advantage of Brickwork's connection to the Nonprofit Success Pack for Recurring Donations! ** Each Partner has a unique way of connecting to iATS for processing. Please contact iATS Customer Care for further details on using non-iATS Partner forms.

4 Part 1 - Checklist and Brickwork Installation

4.1 Installation checklist

It's easy to miss a step! To avoid issues for your users be sure to follow all instructions and check off each item as you complete it:

Download Steps:

- Review the Pre-requisites for downloading Brickwork from the App Exchange
- Obtain an iATS Client Code and password, or testing credentials from iATS Payments.
- Install Brickwork from the Salesforce App Exchange
- Install our NPSP Recurring Donation or Payments extension packages from the iATS Website

Configure:

- Create an iATS Merchant Account Record
- Deploy My Domain if using Lightning
- Modify iATS Settings
- Modify Contact page layouts
- Modify Opportunity (Donation) page layouts
- Modify NPSP Payment page layout
- Modify Recurring Donation page layout
- Modify the iATS Customer Code page layout
- Modify the iATS Transaction page layout
- Schedule the Nightly Download Journal APEX Class

Integrate Aura Online Form:

- Create a Salesforce site URL to add to the iATS Aura online donation page
- Review the [Aura guide](#) and create an iATS Aura online donation page
- If you prefer to use Form Assembly, review the [Form Assembly Brickwork Guide](#) and the [Form Assembly iATS Connector Instructions](#) to create an FA online donation page
- Add Record Type ID's or Campaign's to Aura to control the records created in Salesforce

Learn:

- Review the [Brickwork User Guide](#) to learn how to use Brickwork for transaction processing
- Train your staff how to use Brickwork

4.2 Obtain an iATS Payments Merchant Account

An iATS Client Code is required to fully configure and test iATS Transactions within the Brickwork iATS Button and batch import features. If being utilized, an iATS on-line account (ends in 80) is required to fully configure and test iATS Transactions processed via Aura or AuraLink.

These codes will have been provided to you on the iATS Payments confirmation email that is sent once the Merchant Account has been approved:



For more information regarding setting up an iATS Merchant Account or obtaining temporary test credentials, please [contact iATS Sales](#).

4.3 Install from the Salesforce App Exchange

These instructions are written with the assumption that you are a Salesforce Administrator with permissions to download an application, and have the knowledge pertaining to editing standard and custom object page layouts, adding Lightning specific elements including deploying My Domain.

See our recurring donation overview in the above section for more information on how Brickwork integrates with the NPSP Recurring Donations.

[Click here](#) to find Brickwork on the Salesforce App Exchange.

Notes for installation process:

- Be sure to click “Yes, Grant Access to these Third-Party web sites” when prompted. This will allow Brickwork to communicate with the iATS servers.
- We recommend installing Brickwork for all users, not just Admin users when deploying to Production. This prevents

- If will be using the NPSP Recurring Donation or Payments objects with Brickwork, proceed with downloading our Brickwork [add on extensions here](#). If already logged into Salesforce, you may find it easier to right click on the extension links from our website, and copy/paste them into a new browser URL bar.
- **If using NPSP Recurring Donation's with Brickwork:** To utilize the Recurring Donations object with Brickwork and Aura, you must have our NPSP Recurring Donation add-on extension downloaded. Please [click here](#) to download the "Nonprofit Success Pack 'Recurring Donation' extension package" from our website. We include a production and sandbox link.
- **If using NPSP Payment's with Brickwork:** To utilize the Payment object with Brickwork and Aura, you must have our NPSP Payments add-on extension downloaded. Please [click here](#) to download the "Nonprofit Success Pack 'Payments' extension package" from our website. We include a production and sandbox link.

4.4 Deploy My Domain to all Users (Required for Lightning)

Your users using Lightning they won't be able to see any Lightning Actions, including the iATS Button Action, unless you have deployed your My Domain. This is a standard Salesforce change that isn't related to Brickwork specifically, however we have provided instructions below to assist you with this process.

Key Concepts and Details:

- If you don't have any users who have switched to Lightning, you can ignore this step.
 - You may have already deployed your My Domain to users. If you don't have any issues adding the iATS Button Lightning Action (such as adding it to the page layout removes ALL actions and buttons) then you can skip this step.
1. Within Setup, use Quick Find to locate My Domain.
 2. Select My Domain, then click Deploy to Users and OK.

For more information, please review the [Salesforce Knowledge article](#) for testing and deploying your My Domain.

5 Part 2 - Create iATS Merchant Account(s)

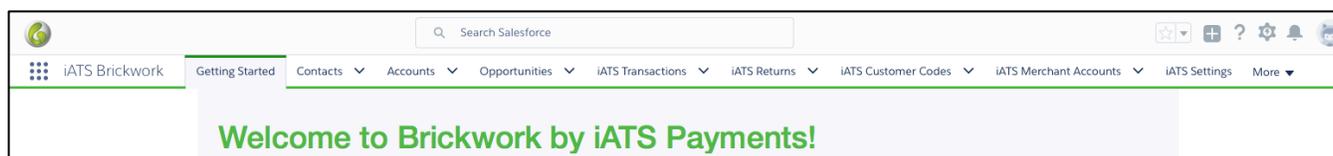
iATS merchant account credentials are stored as Sub-codes and Passwords within **iATS Merchant Accounts**.

Key Concepts and Recommendations:

- Ten iATS Merchant Accounts can be checked as "Active" and will be available for use in the Brickwork iATS Button. All other iATS Merchant Accounts can be left unchecked and are still available for use with Aura Online Donation pages and the Download Journal import process.
- An unlimited number of iATS Merchant Accounts (first for characters of Sub-code, ex: TEST) can be used within Brickwork.
- iATS Merchant Accounts cannot be deleted once used within Brickwork. To remove an iATS Merchant Account from the Download Journal import process, check the "Do Not Include in Journal Download" checkbox.

1. Click on the “iATS Merchant Account” tab, and click “New” to create a new iATS Merchant Account.
2. Add a description to the “Account Name” field. This field name will be visible within Salesforce and should describe the type of transactions. For example, TEST88 – Aura.
3. Click the Active checkmark box if this code will be used within the Brickwork IATS Button. All iATS Client Codes that are being used within Brickwork or Aura should be added as iATS Merchant Accounts, but only those you want visible within the IATS Button need to be Active. There can be up to 10 Active iATS Merchant Accounts.
4. Enter the Client Code and Password that was issued by iATS Customer Care upon setup of your iATS Merchant Account. Please note that if the password is changed in the future, it will need to be updated here to avoid iATS connections problems.
5. The Primary checkbox enables one iATS Merchant Account to be displayed as the default Account within the Brickwork IATS Button.
6. Add a description of the iATS Merchant Account for future reference. For example, “Aura Online”.
7. Select the appropriate “iATS System” and “Currency” for the iATS Merchant Account. Choose “NA” (North America) if the Account has been setup to accept Canadian Dollars or US Dollars. Choose “UK” (United Kingdom) if the Account has been setup to accept any other currency.
8. Click “Save & New” to create the new iATS Merchant Account and move on to the next iATS Client Code.

6 Part 3 - Configure Page Layouts

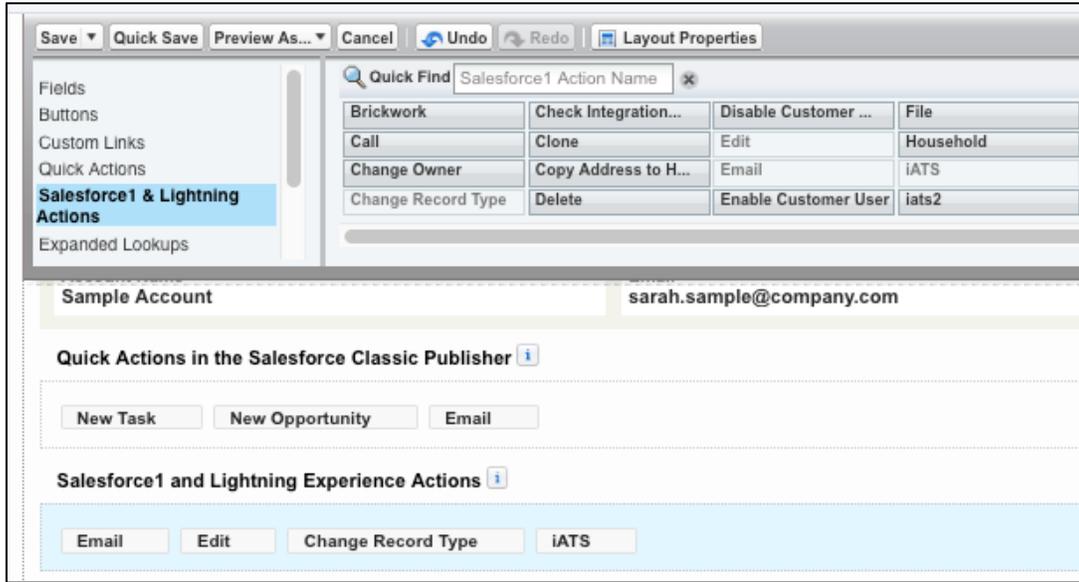


The following will be configured during these instructions:

- iATS Merchant Accounts
- iATS Settings
- Contact
- Opportunity (Donation)
- NPSP Payments
- NPSP Recurring Donations
- iATS Customer Code
- iATS Transactions
- Schedule an APEX Job
- Create a Salesforce Site for Aura online donation form
- iATS Aura Setup

6.1 Configure Contact Page Layout

- Using the Object Manager in Setup, locate the Contact object.
- Click on the page layout(s) you will be adding the iATS Button Virtual Terminal.
- Add the iATS Action to the Lightning Experience Actions area. To add the Classic button, add the iATS button to the “Custom Buttons” area.



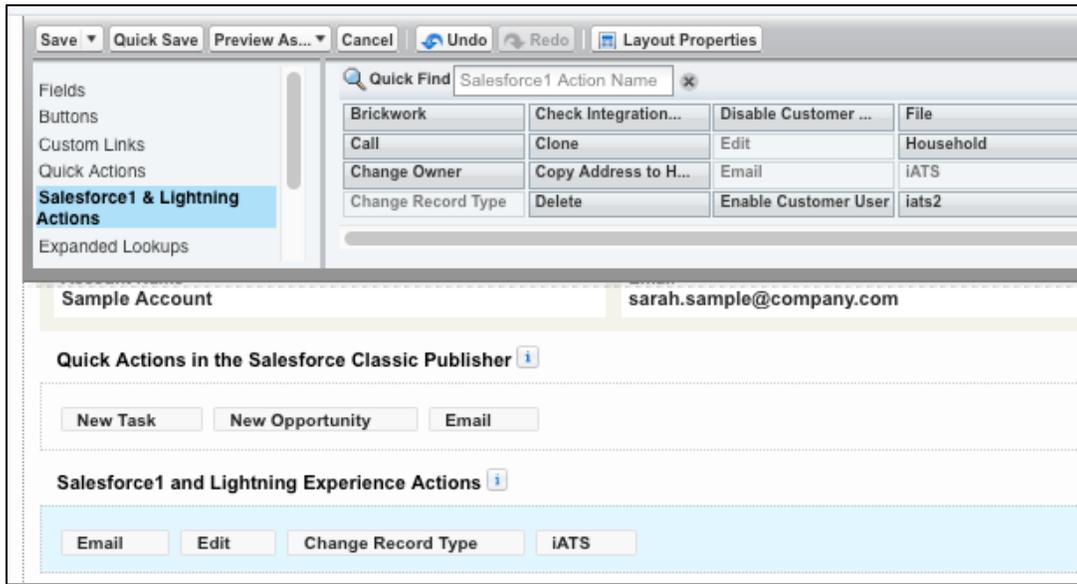
- Add the iATS Transactions and iATS Customer Code related lists. Edit order or remove fields if desired.

iATS Customer Codes									
Customer Code	Mandate ID	Method of Payment	Credit Card Number	Direct Debit Reference Number	Recurring Payment Status	Recurring Payment Schedule Type	Recurring Payment Amount	Recurring Payment Schedule Date	Recurring Payment End Date
Sample Customer Code	Sample Mandate ID	Sample Method of Payment	Sample Credit Card Number	Sample Direct Debit Reference Number	Sample Recurring Payment Status	Sample Recurring Payment Schedule Type	USD 123.45	49,197	9/8/2017

iATS Transactions							
Transaction ID	Amount	Currency	Status	Date	Method of Payment	iATS Merchant Account	Payer State
Sample Transaction ID	USD 123.45	Sample Currency	Sample Status	9/8/2017 5:49 PM	Sample Method of Payment	Sample iATS Merchant Account	Sample Payer State

6.2 Configure Opportunity (Donation) Page Layout

- Using the Object Manager in Setup, locate the Opportunity object.
- Click on the page layout(s) you will be adding the iATS Button Virtual Terminal.
- Add the iATS Action to the Lightning Experience Actions area. To add the Classic button, add the iATS button to the “Custom Buttons” area.



- Add the iATS Transactions and iATS Customer Code related lists. Edit order or remove fields if desired.

Customer Code	Mandate ID	Method of Payment	Credit Card Number	Direct Debit Reference Number	Recurring Payment Status	Recurring Payment Schedule Type	Recurring Payment Amount	Recurring Payment Schedule Date	Recurring Payment End Date
Sample Customer Code	Sample Mandate ID	Sample Method of Payment	Sample Credit Card Number	Sample Direct Debit Reference Number	Sample Recurring Payment Status	Sample Recurring Payment Schedule Type	USD 123.45	4/9/2017	9/8/2017

Transaction ID	Amount	Currency	Status	Date	Method of Payment	iATS Merchant Account	Payer State
Sample Transaction ID	USD 123.45	Sample Currency	Sample Status	9/8/2017 5:49 PM	Sample Method of Payment	Sample iATS Merchant Account	Sample Payer State

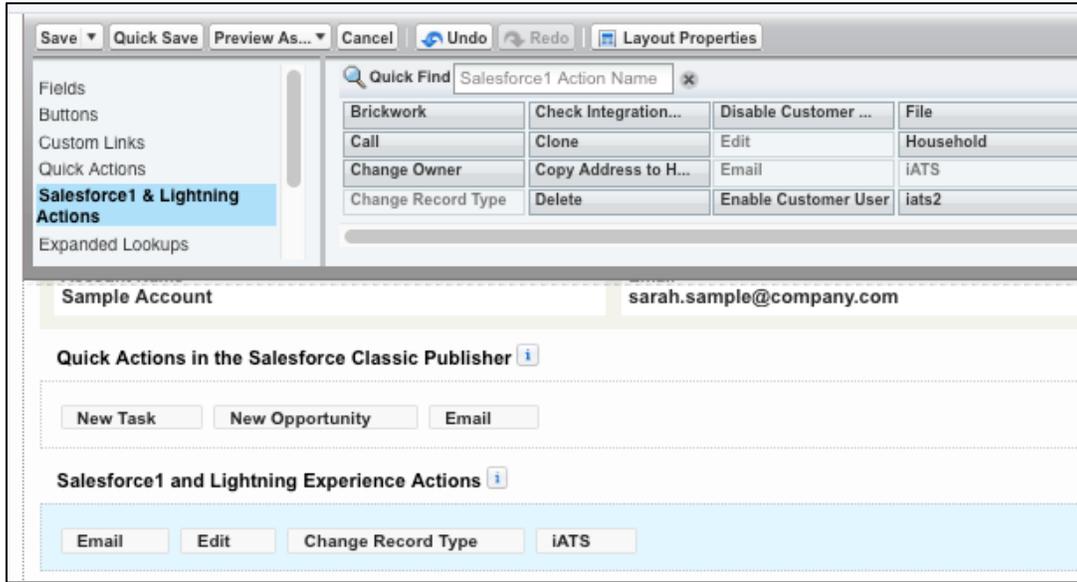
- Add all iATS labeled fields. We recommend that you create a new section titled iATS Aura Details to house the fields.
- If using the **iATS Brickwork NPSP Payment** integration for recurring, on the “Payments” related list, click the wrench icon (Related List Properties) to customize the visible fields. We recommend adding the following fields to the standard fields: Payment Amount, Paid, Payment Date, Written Off, Scheduled Date, Related iATS Transaction, Related iATS Transaction Status.

6.3 Configure NPSP Payments Page Layout

- Using the Object Manager in Setup, locate the Payment object.
- Click on the page layout.
- Add the Related iATS Transaction and Related iATS Transaction Status fields to the page.

6.4 Configure NPSP Recurring Donations Page Layout

- Using the Object Manager in Setup, locate the Recurring Donation object.
- Click on the page layout(s) you will be adding the iATS Button Virtual Terminal.
- Add the iATS Action to the Lightning Experience Actions area. To add the Classic button, add the iATS button to the “Custom Buttons” area.



- Add the iATS Customer Code related list. Edit order or remove fields if desired. To prevent users from creating new iATS Customer Code records outside of the iATS Button, Aura, or Batch Import processes, we highly recommend removing the “New iATS Customer Code” button from the related list if visible.

Customer Code	Mandate ID	Method of Payment	Credit Card Number	Direct Debit Reference Number	Recurring Payment Status	Recurring Payment Schedule Type	Recurring Payment Amount	Recurring Payment Schedule Date	Recurring Payment End Date
Sample Customer Code	Sample Mandate ID	Sample Method of Payment	Sample Credit Card Number	Sample Direct Debit Reference Number	Sample Recurring Payment Status	Sample Recurring Payment Schedule Type	USD 123.45	4/9/2017	9/8/2017

- Add all iATS labeled fields. We recommend that you create a new section titled iATS Aura Details to house the fields.

6.5 Configure iATS Customer Codes Page Layout

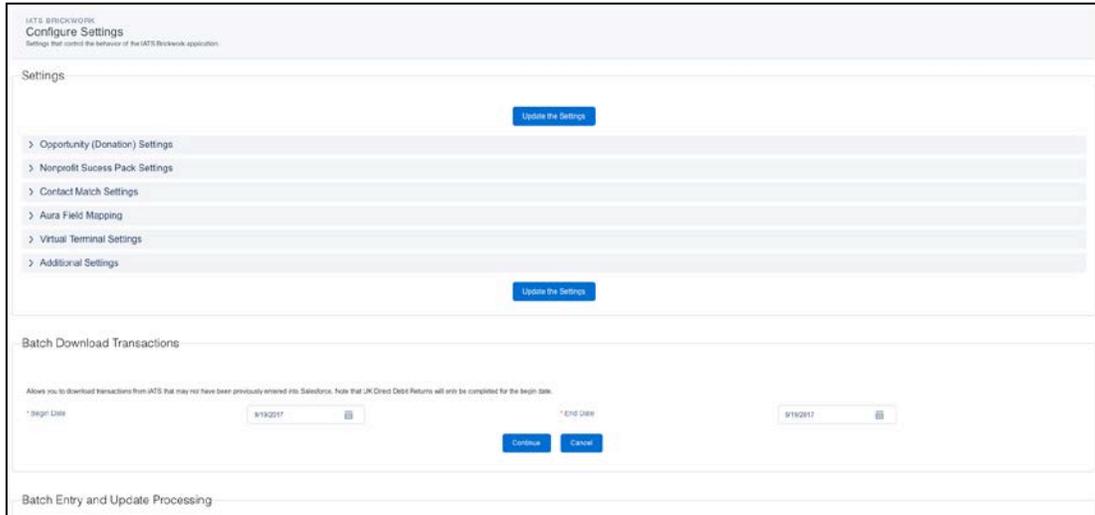
- Using the Object Manager in Setup, locate the iATS Customer Code object.
- Click on the page layout.
- Add the Recurring Donation field below the Opportunity field.
- If not processing UK Pound Direct Debit, remove any fields referencing Direct Debit.

6.6 Configure iATS Transaction Page Layout

- Using the Object Manager in Setup, locate the iATS Transaction object.
- Click on the page layout.
- Add the Payments Related List and add/remove fields as desired.

7 Part 4 - Modify iATS Settings

iATS Settings options customize how Brickwork, Aura, and the iATS button communicate with your unique Salesforce environment and the Nonprofit Success Pack if installed.



7.1 Opportunity (Donation) Settings

The Opportunity (Donation) Settings section is used to control how Brickwork interacts with Donation Opportunities in your Salesforce environment.

Key Fields and Recommendations:

- Stage if iATS Transaction is Approved:** Select Posted if using the NPSP or any other Closed/Won stage if not. Add a checkmark to the Update Stage if iATS Transaction is Approved box on the right.
- Stage if iATS Transaction is Rejected:** Select any Closed/Lost stage. Add a checkmark to the Update Stage if iATS Transaction is Rejected box on the right.
- Stage if iATS Transaction is Pending:** If you will be accepting ACHEFT type transactions, you have the option of stating that all ACH transactions are marked as “Pending” until Brickwork obtains the final results from iATS via the nightly download journal import. By default, ACH Single Transactions are posted to Salesforce immediately with a transaction status of OK:55555 and a related Opportunity Stage of your “closed won” option determined in iATS Settings.
Select any Open stage, such as a custom stage called “Pending ACH Transaction”. Add a checkmark to the Update Stage if iATS Transaction is Pending box on the right.
- Default Opportunity Contact Role:** Select a default Opportunity Contact Role. This option will be utilized for all Opportunity/Donation records that are created by Brickwork.
- Recurring Payments Amount Method:** Used with the Non-NPSP Standard method for tracking recurring payments. This field controls the value added to the Amount field on the Opportunity, either the full amount of a recurring gift total from beginning to end, or the amount they are giving per installment. Selecting Recurring Installment Amount is recommended.

7.2 Nonprofit Success Pack Settings

The Nonprofit Success Pack Settings section enables the configuration between Brickwork and the NPSP. These fields need to be defined if you are using Brickwork with the Recurring Donation or Payments objects. If you are using the Non-NPSP recurring model which, leave all fields empty.

Key Fields and Recommendations:

1. **Nonprofit Success Pack Data Model:** Select the data model that you are using within the NPSP today. Brickwork needs to be configured to use the same model you are using with the NPSP when new Contact records are created.
2. **Recurring Payments Model:** We highly recommend using the Recurring Donations option with the NPSP. You can also utilize our Payments option. For details on each option, please refer to our Recurring overview at the top of this guide.

If using the Recurring Donation Model the following fields are visible:

- a. **iATS Recurring Payments Date Change Action:** This field determines what happens to the Recurring Donation's Donation records if changes to the iATS Customer Code schedule are made. We recommend Opportunity Creation and Delete.
- b. **Pre-Populate Virtual Terminal Recurring Fields:** This field determines if the recurring schedule and amount details will be added to the iATS Button when used on the Recurring Donation record. We recommend turning this on.
- c. **Open Ended Status:** This field determines the behavior of new Recurring Donations that are created by a donor via your Aura online donation form. We recommend selecting Open.
- d. **Additional Settings:** This hyperlink directs you to the NPSP Settings for Recurring Donations. There you can control the max number of Donations that are created for a new recurring schedule. Brickwork honors those selections.

If using the Payments Model the following fields are visible:

- a. **Create Scheduled Payment Records:** Turn this option on to allow Brickwork to create Payment records.
- b. **iATS Recurring Payments Date Change Action:** This field determines what happens to the Payment records if changes to the iATS Customer Code schedule are made. We recommend Payment Creation and Delete.
- c. **Update Rejected Transaction Payment to Written Off:** This field determines if a related payment is marked as Written Off when an iATS Transaction is rejected. We recommend turning this option on.
- d. **Scheduled Payment Records Limit:** This field determines the calculation for the max number of future Payment records that Brickwork will create when you setup a new recurring schedule. We recommend choosing the Number of Payment Records Limit. Also, add a number to the **Limit** field. This is the max number of Payments that will be created. We recommend a number between 2 and 12.
- e. **Do Not Create Past Recurring Payments:** Check the "Do Not Create Past Recurring Payments" if you are migrating existing iATS donors from another system into your Salesforce environment and don't want new Payments to be created back to the original begin date (say back to 2014). We recommend checking this option, and testing to see if it is appropriate for your organization.

7.3 Contact Match Settings

The Contact Match Settings determine which details are used to match online Aura website donors to their existing Salesforce Contact Record, and when a new Contact record will be created instead.

Key Fields and Recommendations:

- **Basic Option:** Matches the Email Address field from Aura to *any* Email type field on the Salesforce Contact Record.
- **Standard Option:** Matches the First Name AND Last Name from Aura to the standard First Name and Last Name field, AND the Aura Email field to *any* Email field OR the Aura Phone field to *any* Phone field on the Salesforce Contact Record.

Example: First Name, Last Name must match, but *either* the Email or phone must match or a new Contact record is created.

- **Advanced Option (Recommended):** Matches any Donor information from the Aura fields to the Salesforce Contact Record based on the logic selected within the “Advanced Logic” section.

Advanced Match includes all Standard and Custom fields on the Salesforce Contact Record.

1. Select the preferred Contact Match Type. We recommend Advanced or Standard.
2. If utilizing the Basic or Standard options, no additional setup is required.
3. If utilizing the “Advanced” option, the “Brickwork Field equals Contact Field” options will be displayed.
 - Additional Rows can be added or removed via the “Add Row” and “Remove Row” options.
 - If desired, custom Filter Logic can be utilized for added flexibility. For more information regarding working with Salesforce Filter Logic, please visit:

http://help.salesforce.com/help/doc/en/working_with_advanced_filter_conditions_in_reports_and_list_views.htm

- Values used within the Contact Match process must match exactly, or no match will be found. For example, if a donor has the last name O'Brien, the Last Name OBrien will not match and a new Contact Record will be created.
- Phone and Email field types are specially formatted Salesforce fields. These field types validate the data that it contains. For example, you cannot save coritest.com as it is missing the “@” symbol.

7.4 Aura Field Mapping

By default, all donor data that is included on an online Aura donation form is posted to the iATS/Brickwork custom fields located on the Opportunity record (or Recurring Donation record in the case of our Recurring Donation NPSP integration). The Aura Field Mapping options can be enabled and customized to map any Aura field data to any other Salesforce field on the Contact, Opportunity, iATS Transactions, iATS Customer Code, and Recurring Donation Records.

Key Fields and Recommendations:

- If using Recurring Donations, any data from the Parent record can be mapped to the child Donation record using the Recurring Donation map settings.
- It is recommended to turn on History Track for mapped fields. This will provide a record of all fields that have been overwritten during the mapping process for reference purposes.

- If two different Aura fields are mapped to the same field within Salesforce, the second row value will be added as it takes precedence. For example: If the First Name is mapped first, and the Last Name is mapped second to the same field, only the Last Name will map to the desired field.
 - Only custom “Aura Field Mapping” values are mapped to the Contact Record when a duplicate contact is found (via the Contact Match settings). Standard mapping (the mapping function for all non-custom mapped fields) to the Contact Record will only occur when a new Contact Record is created.
 - All Text, Email, Phone, and Pick List/Multi-Picklist field types can be utilized for Aura Field Mapping. Aura field values will replace all existing “Pick list multiple” values that may currently be set on the designated Salesforce Record.
1. Select the iATS Merchant Account that was used to create the Aura donation form.
 2. Select the Aura form.
 3. Only those fields that are currently set as Visible on the Aura form will be available within the Brickwork Field pick list. To modify which fields are visible on the Aura form, please refer to the Aura Setup tab or log into the iATS Portal and select the specific Aura form by name.
 4. Select the Salesforce Record (Object) that contains the field that Aura should map to and choose a desired field to map the Aura value to.
 5. If desired, check the “Do Not Update if Blank” checkmark box.
 - **Unchecked:** If this option is not checked, any empty mapped Aura fields will overwrite existing fields values with a blank value. For example, this action would be desired for address fields because it will prevent the mixing of two different addresses:
For example, the donor's address is listed on their current Salesforce Contact record as:
123 Madison Ave., New York, NY, 10005
If the donor enters their new address on the Aura form, but does not include his new Zip Code and State in error, the address would be transferred to Salesforce as:
555 Pine Street, San Francisco, BLANK, BLANK
If the “Do Not Update if Blank” checkmark was added to the Field Mapping Settings, the address for the donor would incorrectly read:
555 Pine Street, San Francisco, **NY, 10005**
The optimal result of this example would be an incomplete address, so that the donor can be followed up with to correct the address.
 - **Checked:** If this option is checked, the donor's Salesforce Record will not be overwritten with blank data from Aura fields when the Custom Map options are being utilized. This may be desired for certain fields such as Name, Phone and Email etc.

7.5 Virtual Terminal (iATS Button) Settings

The Virtual Terminal Settings determine default options within the iATS Button.

Key Fields and Recommendations:

- The Terminal is configured to receive Credit Card data both manually and electronically via a USB swiping device. The preferred option can be saved for convenience. We recommend selecting Manual as the default option, until you connect a device (for example at an event).
- The “Select Create New Donation by Default” checkmark option will default a checkmark in the Create New Donation option within the IATS Button. We recommend this be defaulted as this is useful for One-Time transactions when an Opportunity/Donation record should be created for every approved transaction.

7.6 Additional Settings

The Additional Settings allow control of other functions such as the Brickwork/Aura error notifications and if the scheduled Nightly Download Journal sends a notification email after being run each day. Both options are recommended.

8 Part 5 - Schedule the Nightly Download Journal Import

The Download Journal Import APEX Class allows Brickwork to retrieve Transaction, ACH Return, and BACS Report details from iATS processed the prior day. It should be scheduled during the installation process, but can also be run manually when needed via the iATS Settings tab.

The imported data is used to update Salesforce and NPSP records to reflect when transactions have been approved or rejected, as well as when ACH or Direct Debit items have been returned or need to be reviewed. For more information on how the Download Journal Import tool works and the types of email notifications you will receive, please refer to the [Brickwork User Guide](#).

Key Concepts and Details:

- The Download Journal tool utilizes the “Client Codes” that are saved as iATS Merchant Accounts to access iATS’ servers to obtain processing data.
- Credit Card and UK Direct Debit transactions are imported daily when scheduled, and include yesterday’s transactions.
- ACH North American transactions are imported daily when scheduled, and include all transactions from the prior four days.
- If an error message is received during the import process the current batch and all future batches are aborted, however prior successful batches are not.
- iATS Transaction approved status for single ACH charges is updated during the download updates as the final approval or reject results take up to two business days to be received from the bank.
- The download journal imports data in batches of 200 lines at a time, up to a 10,000 maximum. The import batch size can be amended if needed to accommodate for the NPSP. See below for instructions on how to do that if necessary.

- Only System Administrators are permitted to schedule the Download Journal. **If the Salesforce User who creates the Apex Class is set to Inactive or deleted from Salesforce, the nightly Download Journal will no longer run, and will need to be rebuilt by the new Admin.**
1. Within Setup, use quick find to locate Apex Classes.
 2. Click the Schedule Apex button.
 3. Enter “iATS Nightly Download Journal” for the job name.
 4. Within Apex Class, select the “iATSPayments_journal_log”.
 5. Select Weekly as the frequency, and select each day of the week.
 6. Leave today as the start date, but change the end date to be a date far into the future.
 7. Select a preferred start time between 7am and 7pm (Your own time zone). Internal iATS updates and maintenance may occur between 11:00pm and 4:00am nightly. Setting the “Preferred Start Time” during this window is not recommended.
 8. Click Save.

8.1 Edit the Nightly Download Journal Batch Size (Optional)

It is not recommended to edit the batch size from the standard of 200 unless you are receiving errors from the NPSP.

These errors are rare.

1. Access the iATS Brickwork Custom Settings. In Setup, use Quick Find to locate Custom Settings. Click Edit to the left of IATS Brickwork Settings.
2. Scroll down to the Journal Download Batch Size field and enter a number greater than 1, but less than 200. The maximum size is 200 and minimum is 1. Any values over or under will be discarded and the default 200 batch size will be set.
3. Click Save. **Be sure not to edit any other fields on this page.** If see a value that you’d like to change, use the iATS Settings tab directly.

9 Part 6 - Integrate an Online Donation Form

Until 2016, Brickwork clients had the option of Aura or AuraLink for online donation form processing, which is what we still recommend using, but thanks to our release of the iATS Universal Postback feature, you can connect your third party app like a Form Assembly Donation form to iATS for processing, and take advantage of Brickwork’s connection to the Nonprofit Success Pack for Recurring Donations.

Key Concepts and Details:

- Each Partner has a unique way of connecting to iATS for processing. Please refer to their product manuals for further information on how to setup their tools to connect with iATS.
- Create a new site for use with Aura/Brickwork. Do not recycle an existing site as it won’t work.

9.1 Create a Salesforce Site URL:

1. Within Setup, use Quick Find to locate Sites.
2. If not already done register your Force.com Domain.
3. Click “New” in the Site section of the page to create a new Site.
4. Enter a Site Label, Site Name, Site Description and Site Contact. Enter a URL suffix in the Default Web Address text box.
5. Click the look up icon beside “Active Site Home page”. In the pop-up window, scroll down and select “Aura”.
6. Check the Active checkbox, and click “Save”. This displays a summary of the new Site (“Site Detail”) noting the user name, site URL and label, and other details.

Sites (iats-developer-edition.na6.force.com) New				
Action	Site Label ↑	Site URL	Site Description	Active
Edit Deactivate	Brickwork	http://iats-developer-edition.na6.force.com/iAT...		<input checked="" type="checkbox"/>

7. Return to the site list by clicking on the Site link from the left side Setup menu under Develop.
8. Locate your newly created site, and right click on the Site URL field, and select “Copy Link Address”.

9.2 Connect an Aura or AuraLink form to Brickwork

[Aura](#) and [AuraLink](#) refer to the iATS Payments secure online donation web form which integrates seamlessly into an existing website. Aura and AuraLink have built-in integration with Brickwork, and are connected via a Salesforce Site URL.

Key Concepts and Details:

- A Salesforce Site is created by following the above steps, and should be added as the “Post Back URL” within the Aura or AuraLink donation page.
- Aura can post to either http or https type URL’s. If the website which hosts the Aura page is https it’s recommended to check the “Require Secure Connection” checkbox within the Site Label settings, and add the “s” onto the Site URL when adding to Aura.

- Brickwork Online Aura processing can be integrated with Salesforce Campaigns, and the Contact and Opportunity Record types. Instructions can be found in the next section.
- For more information on how to create an Aura or AuraLink donation page, please refer to the [Aura Installation Guide](#).

9.3 Connect a Form Assembly donation page to Brickwork:

With Form Assembly's iATS Connector, you can easily process one-time credit card payments, set up recurring credit card payments through subscriptions, process ACH or Direct Deposit payments, and create new customers in iATS.

If you have an iATS account, you can follow the recommended installation steps to configure the connector and pass single and recurring donations to Salesforce via Brickwork.

For more information on the Form Assembly iATS Connector, [visit their website](#).

** Please note that this feature is still in BETA. Please refer to the below points to be sure this product to product integration is right for your needs:

- **At this time Brickwork will always create a Salesforce Opportunity for all processed transactions or recurring schedules, or a Recurring Donation if using the NPSP.**

This cannot be disabled in Brickwork if a connection to the NPSP is desired. Because Form Assembly has the ability to create Salesforce Opportunities as well, this could result in an extra undesired Opty record.

There are a few options to overcome this issue such as:

- a. Disable Opty's from being created by Form Assembly, allowing Brickwork and the UPB to create all records. The pro of this option is that there will be no extra opty records. The con is that you may not be able to map custom Form Assembly data to the Opty record. A workaround to this is to map the custom data to Salesforce and have an administrator create a custom solution to move the data wherever you need it in Salesforce. (Recommended)
 - b. Separate how Recurring vs. Single transactions are handled by Brickwork and iATS. The Universal Postback can be enabled for both Single and Recurring posts, or one or the other. For example, Brickwork and the UPB can be configured to receive only Recurring donations, but allow Form Assembly to create all Single donation records. You cannot do this in reverse as Form Assembly cannot create NPSP records.
 - c. Have a developer write a custom solution that creates the required Brickwork and NPSP records based on the authorization responses that Form Assembly receives from the iATS Connector. This option is not recommended unless you have a very unique requirement that cannot be met by option A or B above.
- **Duplicate Contact and Account records may be created by Form Assembly and Brickwork in certain set-up situations.**

If you require that Form Assembly create Salesforce Contact and Account records while the transactions are being processed by the iATS Connector, there could be duplicate records. This is because although Brickwork has extensive Contact Match options to prevent duplicates, the Form Assembly records and the Brickwork records may be created at the exact same time. In these cases the Brickwork Contact Match tool won't locate a duplicate, and will

create a new Contact and Account. This can be avoided by allowing Brickwork to create or find all Contact records. If this solution isn't possible, you may have to write custom code to locate, merge, and delete any duplicate contacts.

- **Only the “standard” payment fields from the predefined Form Assembly content should be used with the iATS Connector.** Renaming or creating custom payment fields will not map to iATS properly and will cause errors.

*Important Considerations when connecting Form Assembly Processing to Brickwork:

- When setting the “**Start Date**” field, There are three options to choose from in the dropdown, Immediately, Use a Formula, and Defined in Form. **Please DO NOT USE Immediately** as this will cause an immediate transaction to be processed, which will not relate to the NPSP Recurring Donation properly. Use either “Use in a Formula”, or “Defined in the form” to set the Start Date.

START DATE *

please select... ▼

please select...

Immediately

use a formula:

defined in the form:

9.4 Modify NPSP Triggers To Prevent Aura Post Errors (Optional)

If your organization has chosen to use the NPSP, there are some built in Validation Triggers that can produce errors when new donors are created via online posts like Aura or the Universal Postback, such as the Preferred Email and Preferred Phone rules. To prevent errors, you can choose to modify the NPSP Triggers to ignore records created via Brickwork.

1. Within Setup, use Quick Find to locate Sites. Click on the site label that is being used with the Aura/Brickwork.
2. Click on the Public Access settings button, click on View Users, and click on the Full Name of the User.
3. Copy the value in the Alias field, which will normally be 'guest'.
4. Access the Validation Trigger code by going to Setup, Contacts, Validation Rules, and either Contact Preferred Email or Contact Preferred Phone (both can be amended).
5. Before pasting the below code, please be sure to review the code you already have listed. **If there have been any prior modifications to the code, do not paste the below.** Instead see below for the values you will add instead.
6. If the code has not been modified, it should like this:

Default Preferred Phone Code:

```
AND(
  ISPICKVAL(npe01__PreferredPhone__c ,""),
  OR(
    LEN(MobilePhone)>0,
    LEN( npe01__WorkPhone__c)>0,
    LEN( OtherPhone )>0
  )
)
```

Default Preferred Email Code:

```
AND(
  ISPICKVAL( npe01__Preferred_Email__c ,""),
  OR(
    LEN(npe01__AlternateEmail__c )>0,
```

```

LEN(npe01__WorkEmail__c )>0,
LEN(npe01__HomeEmail__c )>0
)
)

```

7. **If this matches your code**, there have been no modifications on the default NPSP trigger code. In this case, replace it with the below code which includes the addition of the *CreatedBy.Profile.Name* exclusion:

Updated Preferred Phone Code:

```

AND(
ISPICKVAL(npe01__PreferredPhone__c,""),
OR(
LEN(MobilePhone)>0,
LEN( npe01__WorkPhone__c)>0,
LEN( OtherPhone )>0
),
$User.Alias != ' PASTE ALIAS VALUE HERE '
)

```

Updated Preferred Email Code:

```

AND(
ISPICKVAL( npe01__Preferred_Email__c,""),
OR(
LEN(npe01__AlternateEmail__c )>0,
LEN(npe01__WorkEmail__c )>0,
LEN(npe01__HomeEmail__c )>0
),
$User.Alias != ' PASTE ALIAS VALUE HERE '
)

```

8. ****Important!** Paste the previously copied 'Alias' value to replace the 'PASTE ALIAS VALUE HERE' value above, and click Save.
9. If your code **didn't look like the above**, you can amend it to include the exclusion at the end. In this case, simply add the *\$User.Alias != ' PASTE ALIAS VALUE HERE '* code to the rule, and paste the previously copied alias value to replace the 'PASTE ALIAS VALUE HERE' value.

9.5 Add Campaign ID's or Record Types to an Aura Donation Form

Online [Aura](#) donation forms can be integrated with Salesforce Campaigns, and configured to utilize Contact, Opportunity, and NPSP Recurring Donation record types within Salesforce.

Key Concepts and Details:

- When a Transaction is processed via an Aura donation form that is connected to Salesforce via a Site, Aura pass variables and ID's to your Salesforce org that allow the newly created records to be related.
- This can be done via three different methods:
 - Method 1.** Add the ID's onto the URL of the "Donate" button or link which hosts the embedded Aura form. This method will ensure all iATS Transaction data processed via this Aura form will be assigned the specified values.
 - Method 2.** Add the ID's onto the end of the Salesforce Site within Aura Setup while creating the Aura form. If using Aura Connect for Facebook, we recommend using this option. This method will ensure all iATS Transaction data processed via this specific Aura form will be assigned the specified values. *Note: Adding the ID's via this method will not transmit ID information to the iATS Download Journal Report, which is necessary for iATS to relate records via the Download Journal in the future if needed.*

Method 3. Add the ID's onto the end of a URL, such as included within an email blast, or online post.

This method allows for the flexibility of receiving different ID information from donors via one Aura form. For this method to function properly, please ensure there are no other ID's added as per method 1 and 2 above.

- The Variables that will be used in the following instructions:
 - Opportunity/Donation primary campaign ID variable: **caid**
 - Contact record type ID variable: **cortid**
 - Opportunity record type ID variable: **oprtid**
 - NPSP Recurring Donation record type ID variable: **retdid**

9.5.1 Method 1 - Add ID's to the web page Button/link URL (Recommended)

This method will ensure all iATS Transaction data processed via this Aura form will be assigned the specified values.

1. Create an Aura donation page by following the instructions within the [Aura User Guide](#). If an Aura form is already hosted on your website, skip this step.
2. Obtain the Salesforce Campaign Record ID by going to the Campaign within Salesforce and copying the ID number listed after the Salesforce web address from the URL.

Example: <https://na6.salesforce.com/701A0000000dzhU>

3. Add the Campaign ID and variable onto the end of the URL for the "Donate" button or link to the website that hosts the Aura form by modifying the coding of the button or link. This step may need to be completed by a Web Developer.
4. As per the example below, the first character after the URL link should be a question mark, followed by the Campaign ID variable **caid**, then an equal's sign and the ID itself.

Example: www.genericdonationwebpage.com/Donate?caid=701A0000000dzhU

5. If desired, a Contact and/or Opportunity Record Type can also be added by using the Record Type ID variables **cortid**, **oprtid**, or **retdid** described above. When adding a second variable ID into the URL link, they must be separated by an ampersand.

Example:

www.genericdonationwebpage.com/Donate?caid=701A0000000dzhU&cortid=012A0000000zJ6O&oprtid=012A0000000zJ6Y

6. Processing a test transaction through the Aura form is recommended to ensure the ID's are functioning as expected.

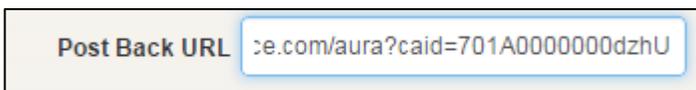
9.5.2 Method 2 - Add ID's to the Salesforce Site in Aura

This method will ensure all iATS Transaction data processed via this specific Aura form will be assigned the specified values.

1. Create an Aura form by following the instructions within the Aura User Guide. If an Aura form is already hosted on your website, skip this step.
2. Obtain the Salesforce Campaign Record ID by going to the Campaign within Salesforce and copying the ID number listed after the Salesforce web address from the URL.

Example: <https://na6.salesforce.com/701A0000000dzhU>

3. Add the Campaign ID and variable onto the end of the Salesforce Site URL, in the Post Back URL Field of Aura Setup.

Example: 

4. As per the example below, the first character after the URL link should be a question mark, followed by the Campaign ID variable **caid**, then an equal's sign and the ID itself.

Example: 

5. If desired, a Contact and/or Opportunity Record Type can also be added by using the Record Type ID variables **cortid**, **oprtd**, or **retrtd** described above. When adding a second variable ID into the Salesforce Site URL, they must be separated by an ampersand.

Example: [?caid=701A0000000dzhU&cortid=012A0000000zJ6O&oprtd=012A0000000zJ6Y](https://na6.salesforce.com/?caid=701A0000000dzhU&cortid=012A0000000zJ6O&oprtd=012A0000000zJ6Y)

6. Processing a test transaction through the Aura form is recommended to ensure the ID's are functioning as expected.

9.5.3 Method 3 - Add ID's to a URL Hyperlink

This method allows for the flexibility of receiving different ID information from donors via one Aura form. For this method to function properly, please ensure there are no other ID's added as per method 1 and 2 above.

1. Create an Aura donation form by following the instructions within the Aura User Guide. If an Aura form is already hosted on your website, skip this step.
2. Obtain the Salesforce Campaign Record ID by going to the Campaign within Salesforce and copying the ID number listed after the Salesforce web address from the URL.

Example: <https://na6.salesforce.com/701A0000000dzhU>

3. Copy and paste the donation page URL into the body of an email or post.
4. Add the Campaign ID and variable onto the end of the pasted URL hyperlink.
5. As per the example below, the first character after the URL link should be a question mark, followed by the Campaign ID variable **caid**, then an equal's sign and the ID itself.

Example: www.genericdonationwebpage.com/Donate?caid=701A0000000dzhU

6. If desired, a Contact and/or Opportunity Record Type can also be added by using the Record Type ID variables **cortid**, **oprtd**, or **retrtd** described above. When adding a second variable ID into the URL hyperlink, they must be separated by an ampersand.

Example:

www.genericdonationwebpage.com/Donate?caid=701A0000000dzhU&cortid=012A0000000zJ6O&oprtd=012A0000000zJ6Y

7. When the URL is clicked, the donor will be directed to the Aura form, and the ID's entered will be displayed in the URL of the site, and pushed to iATS/Salesforce with the transaction details.
8. Processing a test transaction through the URL hyperlink is recommended to ensure the ID's are functioning as expected.

10 Integrate Brickwork within “Auctions for Salesforce” (Optional)

Brickwork can be integrated with the *Auctions for Salesforce* Check In and Check Out tabs for secure registration and payment processing. The below Check In and Check Out URL’s should be added to the Auctions Settings section of *Auctions for Salesforce*.

- **Important:** The Salesforce server your organization uses must be added to each URL to ensure proper check in and checkout functionality (see step 6 below).

Add Brickwork Check In & Check Out Virtual Terminals to Auctions:

To register attendees and store their credit card details using Brickwork, please follow the below steps which detail how to add the URL to the Salesforce Auction Settings.

Please note that the URL’s for Check In (called “Credit Card Validate URL Formula”) and Check Out (called “Credit Card Charge URL Formula”) vary slightly and are **not interchangeable**:

Credit Card Validate URL Formula	https://iatspayment.na2.visual.force.com/apex/IATSPaymentsContact?id={0}&objectType=contact&aid={1}&gwa=s	Check In Terminal
Credit Card Charge URL Formula	https://iatspayment.na2.visual.force.com/apex/IATSPaymentsContact?id={0}&objectType=contact&aid={1}&amt={2}&gwa=c	Check Out Terminal

1. In Set-up (click on your username and choose Set-up), locate the “App Setup” section. Within “Develop”, select “Custom Settings”.
2. Locate “Auctions Settings” and click the “Manage” button.
3. Click on the settings option for your Auction, and click “Edit”.
4. Enter the following **Check Out URL** into the “Credit Card Charge URL Formula” box:

<https://iatspayment.na2.visual.force.com/apex/IATSPaymentsContact?id={0}&objectType=contact&aid={1}&amt={2}&gwa=c>

Note: Please ensure there are no extra spaces included at the end of the URL if pasting the above.

5. Enter the following **Check In URL** into the “Credit Card Validate URL Formula” box:

<https://iatspayment.na2.visual.force.com/apex/IATSPaymentsContact?id={0}&objectType=contact&aid={1}&gwa=s>

Note: Please ensure there are no extra spaces included at the end of the URL if pasting the above.

6. **Replace** the highlighted and strikethrough Salesforce server code example in the above URL’s with the server code used by your organization.

This can be found within the URL address bar when you are logged into your organizations Salesforce instance.



7. For further instructions regarding using the Auctions for Salesforce application, please refer to the *Auctions for Salesforce Installation & Configuration Guide* supported by [DJH Consulting](#).