

iATS is a fully Canadian solution for an online payment system processing credit card and EFT monthly gifts.

iATS Recurring Donations offers a **PCI Compliant** environment for your monthly credit card gift payments. Using iATS, monthly gifts are paid automatically and a report is provided based on those payments.

We incorporated iATS for this purpose several years ago. Providing our clients with a Merchant Account puts them in full control. Donations or ticket purchases can be handled directly through @EASE's Receipt Maintenance window.

The following steps show you how you can easily set up a recurring payment using the iatspayments.com website.

**Steps:**

1. Under Virtual Terminal \ Customer Database ... select Add a New Customer

This is where you will enter the donor's information and their credit card data.

2. Turn Recurring Payment On and the following information below will appear.

3. The first payment will be the next payment date as shown in @EASE in the Pledge Details as the very first gift has been taken.

4. When entering the Amount field **DO NOT format the dollars.** An amount of \$20.00 will be entered as 20 and show as

20 and \$1,000.00 will be entered as 1000.00 or 1000 with no decimal places.

be some time in the future and not the same as the start date.

**\*\*\* Enter the Expiry Date into @EASE on the Pledge Master to keep it current.**

For recurring payments we recommend using a December month, as all on-going gifts build records to December in each new year of giving. Use a last year which is several years ahead with a supporting entry in Dickens to check for an End Date update should the gift still be active.

**@EASE Role in Managing Pledge Activity**

@EASE records payments by detail date which have been paid or declined. Paid gifts as shown in the Receipt window and are listed as Posted on the donor's pledge master record.

**Putting a Pledge Detail into Process:**

Upon receiving the iATS update on payments, successful or failed, you will need to process the gifts for the month and update the decline if the payment failed or post the successful gifts to the Receipt window through the Pledge Process and Export functions.

**Ensuring a Pledge Detail Can be Placed in Process**

On the Pledge master record in @EASE be sure to have at least one character in the account number field and enter the Expiry Date as you can check for this to keep the activity processing by updating the expiry as required. The account number field in @EASE shows as a series of asterisks. Click in the field to ensure a single character exists.

Without this character, detail records cannot be moved into Process so that all paid gifts through iATS can be identified as paid.

@EASE tracks all the gifts which are complete as well as those where the payment failed. This method ensures yearly receipting is accurate.

**Suggestion:** Where a gift is On-going to enter the end date in the Pledge Notes area and into a Dickens entry for the donor to ensure the donations continue past the end date you enter under Recurring Payment. When a pledge detail is posted the Notes area is displayed in the Receipt Notes field.

**Recurring Gift Termination:**

1. If a donor decides to terminate a recurring gift, return to [iatspayments.com](http://iatspayments.com) and remove the recurring process.
2. Cancel the Pledge record through @EASE so that no further details appear when donations are put In Process.