Arena - How To Migrate Your Payment Provider to

ShelbyNext | Giving

Contents

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Overview

Migrating to a new payment provider in Arena is basically 3 steps: Sign-up, make changes in the Arena software, then notify your donors. This document has been created to guide you through the details of these steps. We hope you find this to be useful and enjoy the many advantages of **ShelbyNext | Giving**.

These instructions have been written to work with **Arena** version **2015.2.100** or higher.

Sign up for ShelbyNext | Giving

If you have not already contacted a ShelbyNext Giving team member to setup a **ShelbyNext | Giving** account, go to ShelbyNext.com/Giving/Pricing. Choose one of the three rate plans and fill out the Giving Solution form.

After the Giving Solution form is completed, you will receive an email with further instructions on how to establish your **ShelbyNext | Giving** account. Your gateway credentials will also be provided as part of this process. If you have questions, please contact us at **800-877-0222**, **option 2** to speak with a representative or email us at MyGiving@Shelbyinc.com.

You will be notified after your **ShelbyNext | Giving** account has been established.

Add and Configure the Arena Automation Agent

Follow the steps below to add and configure your Arena Automation Agent.

1. From your web server, run C:\Program Files (x86)\Arena ChMS\Arena Automation Agents**AgentConfiguration.exe**.

2. After the Agent Configuration program appears, click the [Add] button.

3. Select the **Agent.Worker.ArenaRepeatingPayment** worker type, and then click the **OK** button.
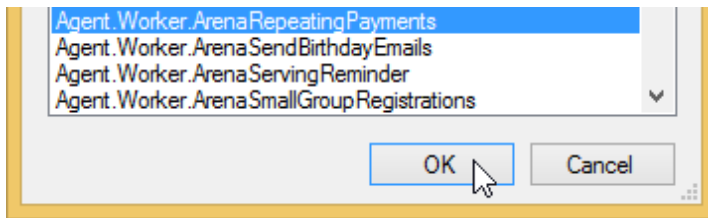

There are 3 tabs that need to be completed based on your preferences: Worker Settings, Schedules, and Notifications. (Contact Support with your preferences if you are a Hosted customer.)

4. From the **Worker Settings** Tab, set the following fields:
   - **Initial Fail Action** – Set to "1" to suspend or "2" to retry the repeating payment.
   - **Reattempt Days** – The number of days to wait before reattempting the failed transaction.
   - **Maximum Failed Payments** – The number of times a transaction is attempted before it is suspended.
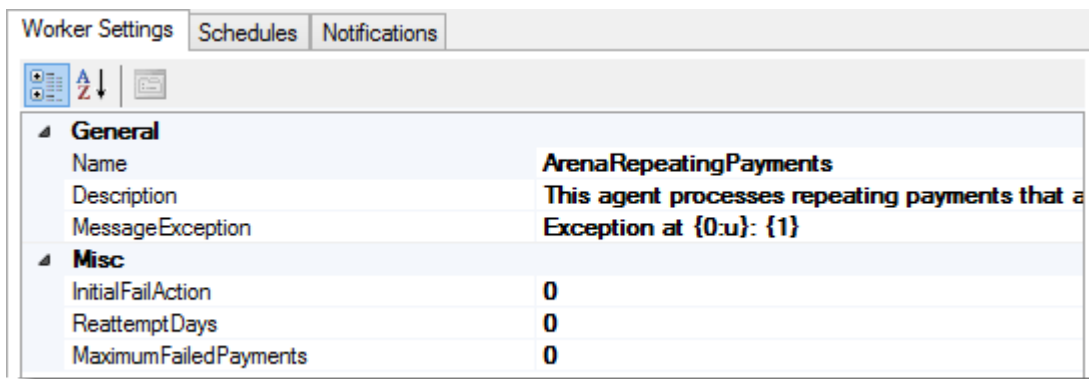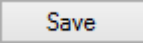

5. From the **Schedules** tab, set the following fields:
   - **Days of Week** – We recommend selecting "Everyday".
   - **Frequency** – How often the process should be run.
   - **Start Time** – The time in 24 hour format to start processing payments.
   - **End Time** – The time in 24 hour format to end processing payments.

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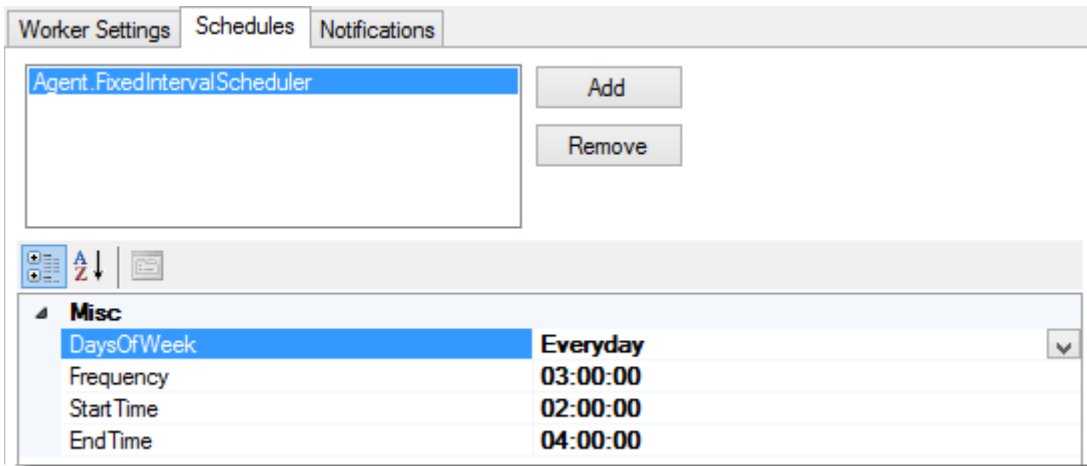
6. From the **Notifications** tab, set the following fields:
   - **Email From** – The email address the Agent uses to send you a notification.
   - **Email To** – The email address of the Administer at your organization to be notified of an Agent error.
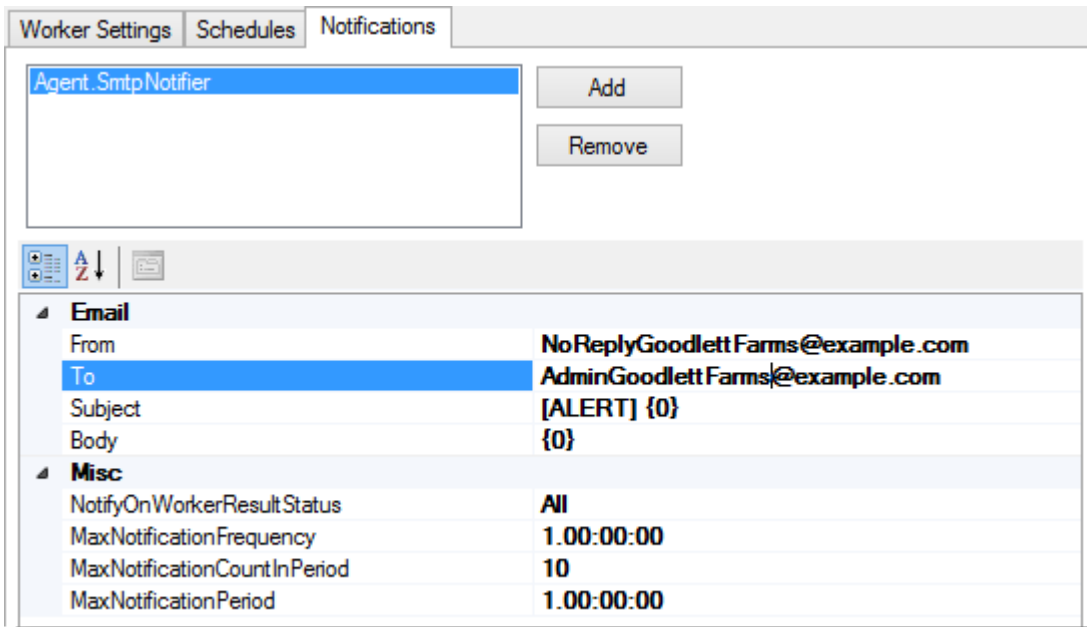
7. Click the [Save] button when you are finished. The job will automatically start the next morning.

Setup ShelbyNext | Giving as your payment provider in Arena

Add Your Payment Gateways

1. From the **Administration** menu, select the **Payment Gateways** option.

2. Click the **Add New Gateway Account** icon.

3. Fill out the listed fields and then click the **Update** button.

NOTE: If you are using both a credit card and bank account to process payments, then you need to setup a separate payment gateway for each. We recommend naming them **ShelbyNext Giving - ACH** and **ShelbyNext Giving - CC**.

Home > Administration > Payment Gateways

ShelbyNext Giving - ACH

List of payment gateways for processing credit cards and ACH payments in Arena.

Title	ShelbyNext Giving - ACH
Payment Processor	ShelbyGiving ▼ **Process** ACH ▼
Merchant Account	123456
Sub Merchant Account	123456
User Name	matthewh
Password	••••••••
Gateway URL	https://gateway.abcbank/achpayment
Log File	
Process Time	12:00 AM

Update Cancel
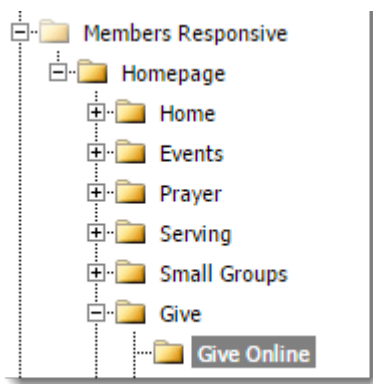
Assign Your New Payment Gateways

You need to assign the new payment gateway to all pages used for repeating payments such as **Events** and **Missions**. Since repeating payments are assigned individually to each event, each event will need to be changed individually while repeating payments are only assigned once in Missions and affect the whole module. The following steps show you how to assign the **ShelbyNext | Giving** - payment gateway to your online giving.

1. From the **Administration** menu, select the **Pages** option.
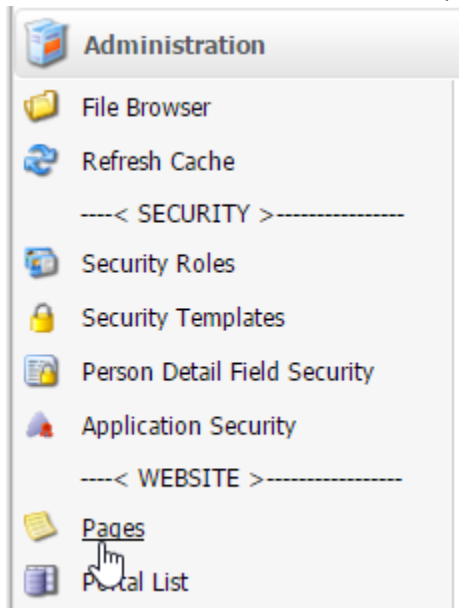
2. Navigate to your online giving page.
   NOTE: Your Page structure may be different than the image below.

3. Under the **Main Content** Tab, click on your *Online Giving* module link.
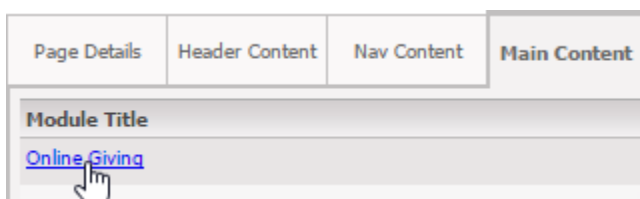
4. Assign "ShelbyNext – Giving ACH" to your **ACH Payment Gateway Name**.

5. Assign "ShelbyNext – Giving CC" to your **CC Payment Gateway Name**.

6. Select "False" for the **One Time Contribution** option.
   NOTE: This will default the "Setup Repeating Gift?" check box to being checked when a giver is setting up a recurring payment.


7. When you are finished, click the [Update] button to save your changes.

If you need assistance with setting up your payment providers, contact Arena support at **1-800-MYSHELBY**.

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Install Gateway Migration from the Arena Hub

The **Gateway Migration** package includes a report for selecting your online donors and it includes email templates that step your online donors through the process of re-validating their online giving information.

1. From the **Administration** menu, select the **Arena Hub** option.
2. The **Gateway Migration** package is listed under both the **Membership** and **Contributions** sections. Locate the **Gateway Migration** package and then click the **Install** button.
   NOTE: Image and/or description may vary from the image below.
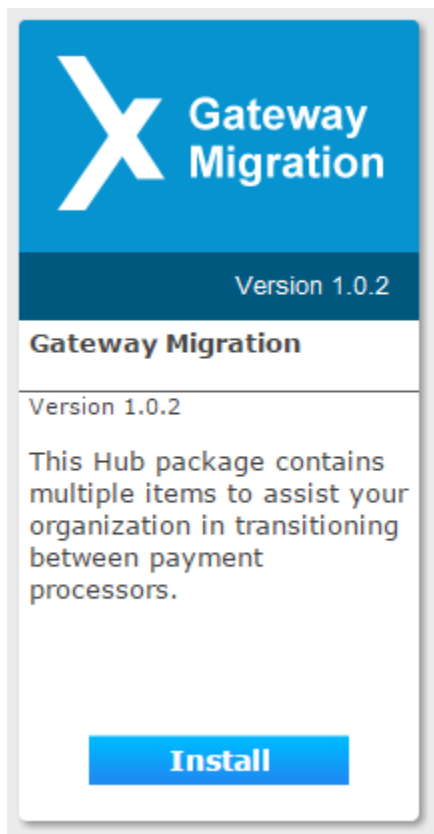
Change to the new Gateway Migration module

1. From the **Administration** menu, select the **Pages** option.
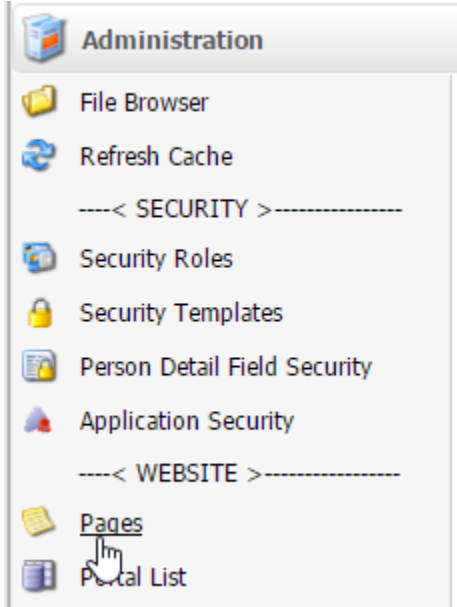
2. Navigate to the **My Repeating Payments** page.
   NOTE: Your Page structure may be different than the image below.

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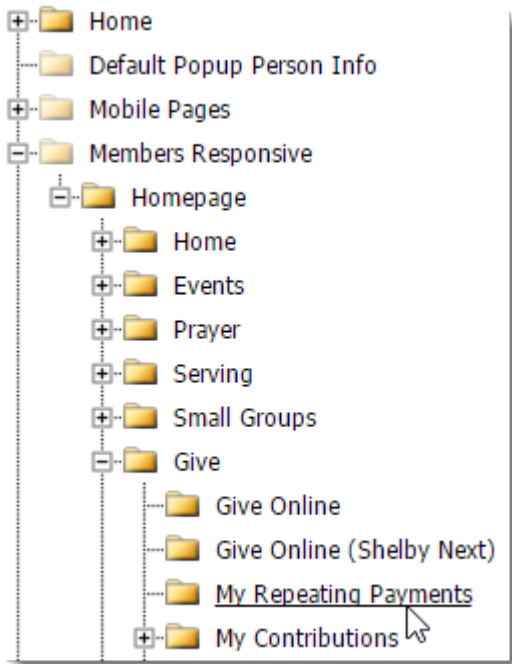
3. From the **Main Content** Tab, click the *My Repeating Payments* link. (The **My Repeating Payments** module appears.)
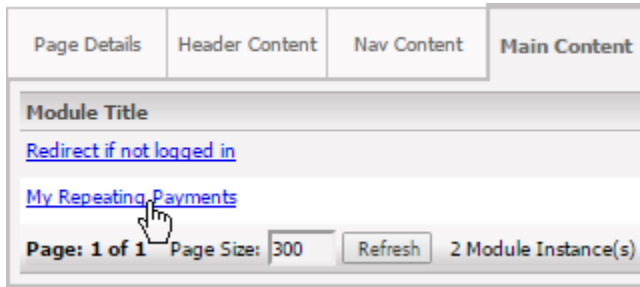
4. From the **My Repeating Payments** module, select "Gateway Migration" from the **Type of Module** drop-down.
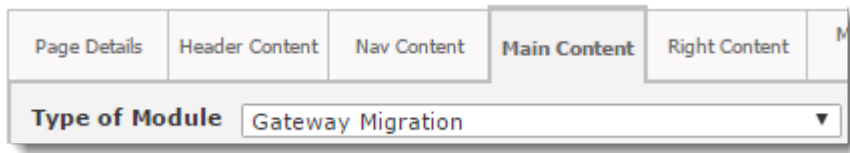
5. Review the general settings for the **Gateway Migration** module and make any modifications as desired. Click the Update button when finished.

ShelbyNext | Financials

If you are using **ShelbyNext | Financials – Accounts Receivable**, the payment provider needs to be changed there as well. There are two steps: First the new payment provider is added and secondly, the payment provider is assigned. Follow the steps below to accomplish this change.

Add The Payment Provider

1. From the **Applications** menu, select **Utilities** -> **Payment Providers**.
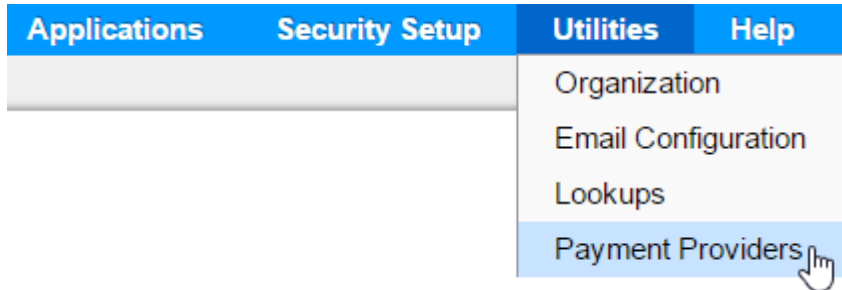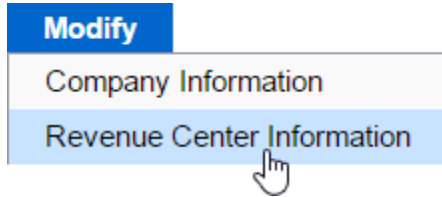

2. Click the **Add New Provider** link.

3. Enter your payment provider information in the field and then click the **Update** button.

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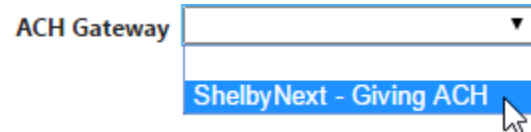## Assign The Payment Provider

1. From the **Accounts Receivable** menu, select **Modify** -> **Revenue Center Information**.

2. Click the **Edit** ✏ icon next to a Revenue Center.
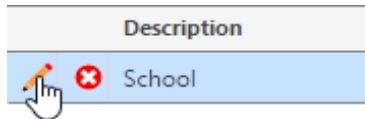
3. From the Online Payment Options frame, select the **Shelby | Next** - Giving payment provider.

4. Click the Update button when you are finished.

Notify Your Repeating Payment Donors

The steps below outline the notification process using the features provided from the **Gateway Migration** package. Before starting the notification process, decide on a final date that the previous payment provider will be canceled so that this date can be used in the notification emails. We recommend contacting your online donors weekly while you are migrating to **ShelbyNext | Giving** as your payment provider.

Create The Repeating Payment List

1. From the **Membership** menu, select the **Public Lists** option.
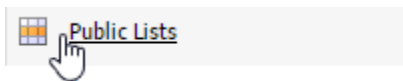
2. Click the **Add New List** icon.
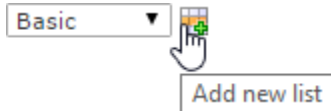
3. Enter "Repeating Payments List" in the **Name** field, and select "Contribution List" from the **Type** drop-down.


4. Assign a **Category** or enter a **Description** (Optional). Click the [Next] button.

5. From the **Selection Criteria** page, select the **Scheduled Giving** tab and specify your criteria.

6. Click the [Next] button.

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7. From the **Field Selection** page, select the following fields and then click the [Finished] button.

Selected Fields

First, Last Name
Payment Active
Payment Amount
Payment First Date
Payment Frequency
Payment Processor
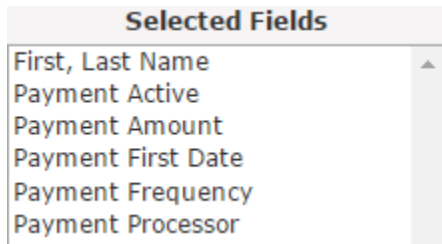
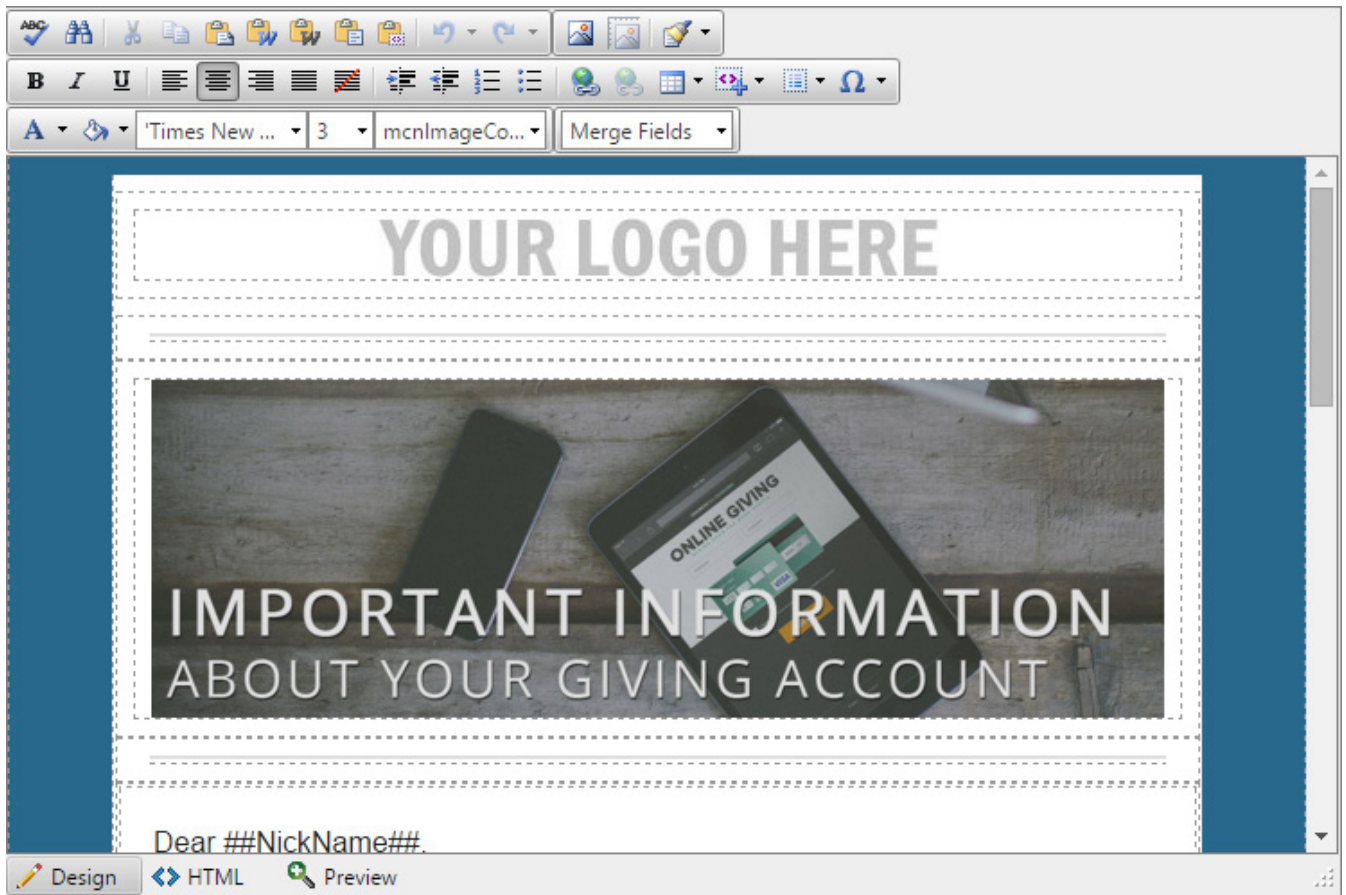## Send Notification Emails to the Online Donors

1. After the list of online donors appears, click the **Send Email** icon at the bottom right of the page.

2. Select "ShelbyNext Giving – Email 1" for the **Template** drop-down and fill in the **From**, **From Email**, **Reply To Email**, and **Subject** fields.

3. Modify your template message as you see fit.

4. Review all the email options and then click the Send email button.

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Below is a sample email:

Goodlett Farms
C H R I S T I A N   C H U R C H

IMPORTANT INFORMATION
ABOUT YOUR GIVING ACCOUNT

Dear ##NickName##,

In an effort to reduce the payment processing fees for online payments and offer new ways for our contributors to give, we are changing our payment providers.

Since your payment information is not transferred to the new payment provider, please login to your online giving site between the dates XX/XX/XXXX and XX/XX/XXXX and re-enter your payment information, and reestablish your repeating payments (scheduled payments). Below are the steps:

Log into your Online Church portal <Insert your Online Church Portal URL>.

1. Click the **Give** tab.

2. Click the **Repeating Payments** button.

3. Click the **Update** button for your active repeating payment under **Prior Scheduled Giving**.

4. Click **OK** to proceed to the Give Online page.

5. From the Give Online page, setup your recurring gift. Be sure to click the **Setup Repeating Gift?** check box (if it is not automatically selected).

6. After clicking the Next button, review your recurring gift on the Confirm Information page, and then click the **Finish** button.

We appreciate your giving and understanding as we move forward with being a good steward of the ministry expenses.

Thank you,

<Pastor Name>

<Church Name>

Please contact the church office with any questions.

[Church Name] | [Address] | [Phone]

Manually Delete Repeating Payments

After sending the last notification email to your online repeating payment donors, there may be donors that have not re-validated their repeating payments. As a final follow-up in communicating with these donors, we recommend you run the "Repeating Payments List" and notify them that their repeating payment is being deleted as part of the migration process to the new payment provider.

Use the steps below to delete the repeating payments:

1. From the **Contributions** menu, select the **Repeating Payments** option.

2. Click the **Delete** icon next to repeating payments.

NOTE: It is recommended that you login to your previous payment provider gateway portal and verify that no more recurring payments exist. If any do exist, it is recommended that you delete them before closing your account.

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Disable Your Old Payment Provider

Payment providers cannot be removed from the system. Once the old payment provider is no longer needed, it is recommended that you rename and clear all fields from the provider to avoid it being used by mistake.

1. From the **Administration** menu, select the **Payment Gateways** option.

2. Click the link for the Previous Payment Provider.

3. It is recommended that you enter "DO NOT USE" at the beginning of the **Title** field. Delete the other fields and then click the **Update** button.