CenterPiece/CDM+ Setup and Configuration Script

Complete the following steps to register a CDM+ API Key in CenterPiece:

1. Go to the *Donor* module and click the *Get Online Gifts* button in the left task pane.

CenterPiece o	ffice Client	Donor	Staff Adm	inistration Help			
Files Fundraising	Letters	Receipting	Reports	Statistics			
«	Donor F	iles				Ś	
Tasks	FileID Last Name / Organization First Name / Spouse Phone					- 5	
New Donor File	р	prentiss					
Setup Categories							
Merge Duplicate Files	Clear Filter	Clear Filter					
Transactions		1	File ID	Name		2	
Batch Entry	Open	1	2322	Prentiss, Elizabeth		{	
Get Online Gifts QuickBooks	<u>Open</u>		2324	Prentiss, Annie		5	

- 2. The Online Giving Connector opens.
- 3. Next, click the *Setup* button in the task pane.

Sack to Files	
Transactions	>
Setup	>
Tasks	
Download	6

- 4. The Setup page opens.
- 5. On the left, click the Add New Account button.

«	
Sack to Files	
Transactions	>
Setup	>
Tasks	
Add new Accou	nt

- 6. The *Registration Wizard* opens.
 7. Complete each step 1-3 in the wizard.

Step 1 - Select an Online Provider

Select CDM+ from the list below and click the *Next* button.

Registration Wizard			×
Step 1: CenterPiece Con	nect Registration		
	c. click flext to continue.	 	
Online Provider: CDM+ CDM+			
eGivingNCS MinistrySync			
		Next	Cancel

Step 2 - Enter CDM+ Provider API Key

Login to your CDM+ merchant portal to get your API Key. This information is located under the **File / Preferences / CDM+ System / General / API** menu.

••	System Preferences							
General	contributions	Accounting	Payroll	Event Reg	istration	Roommate	Sales Ord	lers
(U)		St					0	
Shutdown	Advanced	SST	Web	Update	Audit L	Q og	API	
		-				-		
	URL: http:	s://api.sur	an.com	/api/v2/		c	ору	
							_	
Pro	vision:					C	ору	
	PIN: 6400	0						
View Documentation								
		_	_		_			-
Revert Displayed S	ettings						Cancel	Save

See How to Find API Credentials for more details.

Once you have your API Key, simply copy and paste it into the wizard as seen in the screenshot below:

Registration Wizard	×
itep 2: CDM+ Registration	
nter your CDM+ credentials. Click next to continue.	
API Key:	
Enter your CDM+ API Key. This information is found on your CDM+ Profile page. Please contact CDM+ if you have questions.	
Previous Next Cancel	

Step 3 - Enter the Start Date

Transactions on or after the *Start Date* will be included in the first download. After each download, the *Start Date* is advanced to the current date.

Registration Wizard	×
Step 3: Registration Set online provider options. Click Save and Close to complete registration.	
Enter Download Start Date: 7/18/2020	
 Please Note: Transactions on or after the start date will be included in first download. After each download the start date is incremented to the current date. 	
Previous Save and Close	Cancel

Finally, once you have specified the online provider options in Step 3, click the Save and Close button and you're done!