
Brickwork Release Notes: Version 5.20

Brickwork SANDBOX Release – February 14th, 2018

New Features

- Updated logos for Brickwork and Aura. **See Action Items below for further instructions for existing clients.*
- Changes to iATS Report Templates. The iATS Batch Entry field “ACH/Direct Debit Bank Numbers” was added to accommodate for processing of recurring and single imports. **See Action Items below for further instructions for existing clients.*
- Updated Recurring Donation NPSP Extension to version 2.72. **See Action Items below for further instructions for existing clients.*
- Updated code to compensate for person account and aura field mapping.
- Updated code to allow recurring payments batch code size to be set via "Journal Download Batch Size" field via custom settings.
- Updated FAQ's link on the Getting Started page for Lightning users.

Bug Fixes

- Updated code to correct small issue if there is an apostrophe and no phone number for contact match settings.
- Resolve issue when there is no default closed/lost opportunity stage.
- Add a validation rule to the iATS Batch Entry record “Card Type” field to ensure correct values are used when creating new records via batch.
- Updated Method of Payment field on the iATS Batch Entry record to allow 'ACH/Direct Debit' instead of 'Direct Debit' so the value correlates correctly to the picklist value.
- Within the iATS button (virtual terminal) update the error reject code links.
- Within the iATS button (virtual terminal) update 'related record' URL to compensate for myDomain.

Important Action Items

- **Manually update your NPSP Recurring Donation extension** to the newest version 2.72. This is needed to correct a small bug within the iATS Button on the Recurring Donation record.
 - [Click here](#) to update in your Sandbox (on February 14th)
 - [Click here](#) to update in your Production (on February 21th)

- **Edit the Brickwork template reports** to include the “ACH/Direct Debit Bank Numbers” field:
 - Click on the Reports Tab.
 - Click on the iATS Brickwork Reports folder.
 - Open the “iATS Batch Entry Template – Recurring” report and click Customize.
 - Locate the “ACH/Direct Debit Bank Numbers” field from the list on the left, and add to the report, just to the right of the “ACH/Direct Debit Account Type” field.
 - Click Save.
 - Repeat steps for the “iATS Batch Entry Template - Single Tran” report.
- **Update the Brickwork and Aura Logo’s.** If you use Lightning, please download the new Brickwork Icon Logo by [clicking here](#), right click on the image and save it as picture onto your computer.

The new Aura logo and the new Brickwork Logo for Classic users are included in the new package, in the Public documents area.

 - Brickwork App Logo:
 - Within the Salesforce Setup menu, use quick find to locate Apps (Classic) or App Manager (Lightning).
 - Locate the iATS Brickwork apps. Note that for Lightning users there will be two apps, one for Classic and one for Lightning. We recommend updating both.
 - Click Edit (Classic) or the arrow on the far right, then Edit (Lightning).
 - For Lightning: Change the Brickwork Logo by uploading/Inserting the new logo you have saved on your desktop and save. Lightning users should use the **Brickwork Icon Logo image**. Click Save, and Done. For Classic: Classic users will be prompted to select a folder within Salesforce Documents. Select Public, and choose the **iATSLogo5_classic** logo.
 - iATS Aura Setup page Logo:
 - Within the Salesforce Setup menu, use quick find to locate Tabs.
 - Click Edit beside “iATS Aura Setup”. Lightning users will find this in the Visualforce Tabs section at the bottom.
 - Beside Tab Style, click the lookup magnifying glass to open a new window.
 - Click the “Create your own style” button at the top of the new window.
 - Click the “Insert an Image” button and select the **AuraTabLogo5**

- logo from the public folder.
- Click OK, and Save.
- iATS Settings page Logo:
 - Within the Salesforce Setup menu, use quick find to locate Tabs.
 - Click Edit beside “iATS Settings”. Lightning users will find this in the Visualforce Tabs section at the bottom.
 - Beside Tab Style, click the lookup magnifying glass to open a new window.
 - Click the “Create your own style” button at the top of the new window.
 - Click the “Insert an Image” button and select the **IATSTabLogo5** logo from the public folder.
 - Click OK, and Save.
- Getting Started page Logo (Lightning Users Only):
 - Within the Salesforce Setup menu, use quick find to locate Tabs.
 - Click Edit beside “Getting Started” page within the Visualforce Tabs section.
 - Beside Tab Style, click the lookup magnifying glass to open a new window.
 - Click the “Create your own style” button at the top of the new window.
 - Click the “Insert an Image” button and select the **IATSTabLogo5** logo from the public folder.
 - Click OK, and Save.

Push Update Installation Information

- **Version 5.20 has been automatically pushed to all existing users Sandbox instances only.**
- To confirm if you are now using the most up to date version, please visit the Salesforce **Setup** menu and locate the **Installed Packages** link. You will be able to see the version number beside iATS Payments.
- If you are using an older version and wish to take advantage of our new features and improvements, please visit the [Salesforce AppExchange](#) and update to the latest version by clicking “Get it Now”.

Brickwork Release Notes

New Brickwork Release – November 26, 2017

Brickwork release 5.17

New Features

- Correct bug in which Direct Debit Reference number not populating correctly on the iATS Customer Code when using Rapidata processor.
- Modify Download Journal code to accommodate for new XML formatting within Smart Debit Direct Debit ADDACS BACS report import.
- Correct bug related to ACH Customer Code batch updates removing payment data in certain circumstances.
- New Payer fields added to iATS Customer Code record to accommodate for updating via Batch:
 - Payer First Name
 - Payer Last Name
 - Payer Email
 - Payer Address
 - Payer City
 - Payer State
 - Payer Zip Code
 - Payer Country
- New Brickwork Report “iATS Batch Update CCode Template” has been added to the Brickwork Reports Folder which includes the new Payer fields listed above. ACH and CC payment fields have been removed from the template as those fields cannot be updated via batch at this time. The original report template will be deprecated in a future version.

Action Items

- New iATS Customer Code payer fields will need to be manually added to the page layout.
 - From Salesforce Setup, locate the iATS Customer Code object (using object manager in Lightning, or via Objects in Classic).
 - Edit the page layout.
 - Add the new fields to the page layout and optionally in a new section called “Payer Details”.
- There are no changes to the NPSP Recurring Donation or Payments extensions.

Push Update Installation Information

- **Version 5.17 has been automatically pushed to all existing users.**
- To confirm if you are now using the most up to date version, please visit the Salesforce **Setup** menu and locate the **Installed Packages** link. You will be able to see the version number beside iATS Payments.
- If you are using an older version and wish to take advantage of our new features and improvements, please visit the [Salesforce AppExchange](#) and update to the latest version by clicking “Get it Now”.

Brickwork Release Notes

New Brickwork Release – October 26, 2017

Brickwork release 5.15

New Features

- When using the iATS Button, the Contact related to the Recurring Donation will be automatically related to the iATS Customer Code record.
- Company Name field added to Aura Mapping options.
- Various Bug Fixes and Improvements.

Action Items

- No Admin actions are needed for these updates
- There are no changes to the NPSP Recurring Donation or Payments extension.

Push Update Installation Information

- **Version 5.15 has been automatically pushed to all existing users.**
- To confirm if you are now using the most up to date version, please visit the Salesforce **Setup** menu and locate the **Installed Packages** link. You will be able to see the version number beside iATS Payments.
- If you are using an older version and wish to take advantage of our new features and improvements, please visit the [Salesforce AppExchange](#) and update to the latest version by clicking “Get it Now”.

Brickwork Release Notes

New Brickwork Release – September 26, 2017

Brickwork release 5

New Features

- Batch creation and process - the ability to batch charge single transactions, batch schedule new recurring donors, and batch update recurring schedules.
- Various Bug Fixes and Improvements.
- New Recurring Donation Extension to accommodate for new batch features.

Action Items (Important)

- As an existing client who has been automatically updated to version 5, you'll need to make a few easy configuration changes to use the new batch features. **Please follow the instructions in this [Upgrade document](#).**
- Manually update the Recurring Donation and/or Payments Extension if using the NPSP. Links can be found on the [iATS Website here](#).
- Please review our all new [Brickwork User Guide](#) for details on how to use our new batch features.

Push Update Installation Information

- **Version 5 has been automatically pushed to all existing users.**
- To confirm if you are now using the most up to date version, please visit the Salesforce **Setup** menu and locate the **Installed Packages** link. You will be able to see the version number beside iATS Payments.
- If you are using an older version and wish to take advantage of our new features and improvements, please visit the [Salesforce AppExchange](#) and update to the latest version by clicking "Get it Now".

Brickwork Release Notes

New Brickwork Release – August 8, 2017

Brickwork release 4.5028

New Features

- Lightning Compatibility
- New “Getting Started” support page for Lightning users
- Custom Label support for French translations
- Aura Mapping for new Items 7-15, Label 1-15, Title, Company Name
- ‘Bank Withdrawal’ label changed to ‘ACH/Direct Debit’ in iATS Button
- iATS Transaction ‘Amount (\$)’ field label replaced with ‘Amount’
- New Recurring Donation and Payment Extensions for Lightning
- Various Bug Fixes and Improvements

Action Items (If Required)

- Add new iATS Items 7 – 15 and iATS Label 7 – 15, iATS Title, and Company Name fields to the Recurring Donation and Opportunity Page Layouts.
- If using Lightning, you’ll need to add the iATS Lighting Action to the Contact, Opportunity, Account, and Recurring Donation page layouts.
- If using Lightning and not already enabled, you’ll need to enable and deploy “My Domain” in order to use the new Lighting Actions.
- **Manually update the Recurring Donation and Payment Extensions if using the NPSP. Links can be found on the [iATS Website here](#).**

Push Update Installation Information

- **Version 4.5028 has been automatically pushed to all 4.5022 users.**
- To confirm if you are now using the most up to date version, please visit the Salesforce **Setup** menu and locate the **App Setup** sub-menu, and click on the **Installed Packages** link. You will be able to see the version number beside iATS Payments.

- If you are using an older version and wish to take advantage of our new features and improvements, please visit the [Salesforce AppExchange](#) and update to Brickwork Version 4.5028 by clicking “Get it Now”.

New Brickwork Extension Release – July 5, 2017

NPSP Payments Extension v.1.1 and NPSP Recurring Donation Extension v.1.7

New Features

- Addition of Items 7 – 15
- Addition of Items 1 – 15 Labels
- Addition of new fields Company Name and Title
- Various label updates from IATS to iATS
- Update to prevent the “Invalid Decimal” error message during Nightly Download Journal.

Action Items

- If you have integrated Brickwork with the NPSP Recurring Donation or the Payment objects, you will need to manually update the extensions that were downloaded when your organization setup Brickwork with the NPSP. This is a very easy process and can be updated by [clicking here](#), and following the Salesforce Update Wizard.

Require assistance?

If you have any questions about your Brickwork setup or upgrading these extensions, simply contact our Customer Care team via email at iatscs@iatspayments.com or by phone at 1.888.955.5455 (North America), 0808.234.0466 (UK).

You can also visit our [Brickwork page](#) to find the latest updates and resources available to you.

Brickwork Release – November 23, 2016

Brickwork release 4.5019

New Features

- Added optional 'iATS Settings' to allow user to specify 'pending' opportunity stage for ACH transactions
- Added import batch size option to the iATS Download Journal to less than 200 at a time.
- Various Bug Fixes

Action Items (Optional)

- By default, ACH Single Transactions are posted to Salesforce immediately with a transaction status of OK:5555 and a related Opportunity Stage of your “closed won” option determined in iATS Settings.
By enabling the new options for “Stage if iATS Transaction is Pending”, Brickwork will mark the related Opportunity Stage to an “open” value of your choice. Once the iATS Transaction Status field is updated to reflect the proper Approval or Rejection Status, the Opportunity Stage will be automatically updated to the “closed won” stage.

Stage if iATS Transaction is Pending  --None-- 	Update Stage if iATS Transaction is Pending  <input type="checkbox"/>
---	--

- If you wish to reduce the batch size of your iATS Download Journal import (manual or scheduled), this is done in Custom Settings (Path to adjust field: Setup > Develop > Custom Settings > IATS Brickwork Settings > Manage > Edit > Journal Download Batch Size field).
Please note that 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.
This update is not recommended unless you are receiving NPSP errors related to batch sizes.

Push Update Installation Information

- **Version 4.5019 has been automatically pushed to all 4.5017 users.**
 - To confirm if you are now using the most up to date version, please visit the Salesforce **Setup** menu and locate the **App Setup** sub-menu, and click on the **Installed Packages** link. You will be able to see the version number beside iATS Payments.
 - If you are using an older version and wish to take advantage of our new features and improvements, please visit the [Salesforce AppExchange](#) and update to Brickwork Version 4.5019 by clicking “Get it Now”.
-

Brickwork Release Notes

Brickwork Release – August 26, 2016

Brickwork release 4.5016

New functionality

- Updated 'advanced' duplicate logic to compensate for large databases that have 800,000+ contact records
- Update Aura mapping and Download Journal Import tool to allow '.business' and '.COMMUNITY' email extensions
- Various Bug Fixes including improved functionality for Universal Postback

Action Items

- There are NO action items required.

Push Update Installation Information

- Version 4.5016 has been automatically pushed to all 4.5013 users.
- To confirm that you are now using the most up to date version, please visit the Salesforce Setup menu and locate the App Setup sub-menu, and click on the Installed Packages link. You will be able to see the version number beside iATS Payments.
- If you are using an older version and wish to take advantage of our new features and improvements, please visit the [Salesforce AppExchange](#) and update to Brickwork Version 4.5016 by clicking “Get it Now”.

Brickwork Release – June 20, 2016

Brickwork release 4.5013

New functionality

- Record Type Integration now available for NPSP Recurring Donation's using value "retrid". Download an updated copy of the [Brickwork User Guide](#), page 36 for more details
- Ability to edit the Expiry Date field separately from the Credit Card number now available for the Recurring Donations iATS button virtual terminal
- iATS button virtual terminals now prevent double-clicking
- "iATS Account" tab has been renamed as "iATS Merchant Account"
- Various other updates and bug fixes

Action Items

- If you have integrated Brickwork with the Nonprofit Starter Pack's Recurring Donation object, a new version (1.6) of our Extension has been released.
- This needs to be manually updated by [clicking here](#), and following the Salesforce Update Wizard

Push Update Installation Information

- Version 4.5013 has been automatically pushed to all 4.5011 users.
- To confirm that you are now using the most up to date version, please visit the Salesforce Setup menu and locate the App Setup sub-menu, and click on the Installed Packages link. You will be able to see the version number beside iATS Payments.
- If you are using an older version and wish to take advantage of our new features and improvements, please visit the [Salesforce AppExchange](#) and update to Brickwork Version 4.5013 by clicking "Get it Now".

Brickwork Release – April 5, 2016

Brickwork release 4.5011

New functionality

- Single iATS Transactions will now automatically relate to the corresponding Payment record when using Brickwork with the NPSP Payments model.
- New ability to edit the Expiry Date separately from the credit card number when using the iATS Virtual Terminal.
- Various bug fixes and improvements.

Action Items

- No action items are required.

Push Update Installation Information

- Version 4.5011 has been automatically pushed to all 4.5009 users.
- To confirm that you are now using the most up to date version, please visit the Salesforce Setup menu and locate the App Setup sub-menu, and click on the Installed Packages link. You will be able to see the version number beside iATS Payments.
- If you are using an older version and wish to take advantage of our new features and improvements, please visit the [Salesforce AppExchange](#) and update to Brickwork Version 4.5011 by clicking “Get it Now”.

Brickwork Release – February 10, 2016

Brickwork release 4.5009

New functionality

- Bug fix which prevented custom Aura Mapping from functioning in some cases.

Action Items

- If you are using Brickwork with the NPSP Recurring Donation records, please click [here](#) to update our Brickwork NPSP Extension to Version 1.5.

Push Update Installation Information

- Version 4.5009 has been automatically pushed to all 4.5008 users.
- To confirm that you are now using the most up to date version, please visit the Salesforce Setup menu and locate the App Setup sub-menu, and click on the Installed Packages link. You will be able to see the version number beside iATS Payments.
- If you are using an older version and wish to take advantage of our new features and improvements, please visit the [Salesforce AppExchange](#) and update to Brickwork Version 4.5011 by clicking “Get it Now”.

Brickwork Release – January 25, 2016

Brickwork release 4.5008

New functionality

- Automatic iATS Customer Code and Contact relating - When you use the Brickwork VT to create a new recurring token, you no longer need to relate the Customer Code and Contact records together manually. Brickwork will automatically relate the Customer Code to the “Primary” contact role on the Opty.
- Rejected recurring Payment records marked as Written Off – There is a new option to have rejected iATS Transactions update the NPSP 'written off' checkbox when using our NPSP Payments integration. Optionally enabled via iATS Settings.
- Manual re-post option within Aura Post Error Emails – Should you receive an Aura post error message indicating the Aura donation information wasn't posted to Salesforce properly, once the issue has been addressed you can now force the “post” to Brickwork to happen again by clicking the URL at the bottom of the error message.
- Various bug fixes and improvements.

Action Items

- If you are using Brickwork with the NPSP Payment records, you can optionally enable the new “Update Rejected Transaction Payment to Written Off” feature within the iATS Settings Tab.

▼ Nonprofit Starter Pack Settings

Nonprofit Starter Pack Data Model	Household ▼	Update Rejected Transaction Payment to Written Off <input checked="" type="checkbox"/>
Recurring Payments Model	Opportunity (Donation) and Payments ▼	IATS Recurring Payments Date Change Action <input type="checkbox"/> Payment Creation and Delete ▼
Scheduled Payment Records Limit	Number of Payment Records Limit ▼	Create Scheduled Payment Records <input checked="" type="checkbox"/>
Limit	5	

Push Update Installation Information

- Version 4.5008 has been automatically pushed to all 4.5006 users.
- To confirm that you are now using the most up to date version, please visit the Salesforce Setup menu and locate the App Setup sub-menu, and click on the Installed Packages link. You will be able to see the version number beside iATS Payments.
- If you are using an older version and wish to take advantage of our new features and improvements, please visit the [Salesforce AppExchange](#) and update to Brickwork Version 4.5011 by clicking “Get it Now”.