

## CCB/SecureGive Authentication Instructions

1. Log into administrator account on CCB
2. Go to System Settings.
3. Choose API
4. Click Users Tab - If you already have an API user profile setup using all services you can click on the name and use this login info in SecureGive or you can set a new one.
5. To set up a new API user, click Add New API User on the right.
6. Enter your information to set up your API User. Do not hit save until the after the next step. \* Note you will need this username and password in SecureGive
7. Select Services at the top. Then Select All Services
8. Scroll to the bottom and hit Save.
9. Log into your SecureGive client admin
10. Under Settings, Choose Church Community Builder
11. Enter your CCB Church ID-this is the first part of the CCB URL:  
Example: Awesomechurch.ccbchurch.com  
Church id: Awesomechurch
12. Enter API user info
13. Click Authorize – You should get a green check mark when authorized
14. Go back to your dashboard and go under Organization, then Campuses
15. Click on the name of each campus ( even if you have only one)
16. Connect this campus with the CCB campus id using the drop down and save.
17. Go under Settings to Configuration Settings and scroll to the bottom of the page to choose whether you want your transactions to upload in Single entries or Batch entries.

**\*When you have completed these steps, each of your existing categories in SecureGive will need to be connected with the appropriate CCB fund id. You can do this by clicking on the category name then search CCB and click on the correct fund and hit save. If you are creating new categories, you can search CCB for the fund id when you add them.**

**Then if you have members already in the SecureGive system, you will need to go to their profile and connect them with their CCB member id. You can do this by either clicking on their name from the transaction reports or by going under member management and finding their name then clicking on the edit pencil to take you to their profile.**

**For members creating a new profile in the SecureGive system, they will first enter their phone number. The system will search CCB for a match to that number. If a match is found, the name(s) will be displayed on the screen. The member then selects their name to connect to their CCB profile and that information will be transferred to SecureGive along with their member id.**

**\*\*Also, go to the members tab and click the orange “Anonymous Member” button at the top. Then search CCB for your anonymous member (“loose cash” , “anonymous giver”) and connect it.**

**\*\*\*Please note that you will need to monitor your CCB Status column in SecureGive on a regular basis to see if there are transactions pending or in error for upload to CCB so that you can connect them properly for upload.**