MANAGING THE GIFT SERVICE CENTER

How do I configure and link to the GSC?

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your passion › our purpose

➤ AGENDA

- **What is the Gift Service Center (GSC)?**
- **What are the Self-Service Options for Donors?**
- **How Do I Configure the GSC?**
- **Linking to the GSC**
- **Some Reminders**
- **Gift Service Center Layout**
- **Resources**
- **Questions**

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➤ WHAT IS THE GIFT SERVICE CENTER (GSC)?

The Gift Service Center is the constituent-facing interface that donors can use to edit their billing information or the details of a recurring gift plan.

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WHAT ARE THE OPTIONS?

Well, you decide which self-service options are available for donors including:

• Modifying their billing information such as credit card number and the date on which the payment is processed

• Cancelling all remaining payments for a gift

• Skipping their next scheduled payment

• Changing the amount of their gift

What will I allow donors to do?

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➤ HOW DO I CONFIGURE THE GSC?

CONVIO LUMINATE

Content   Fundraising   Advocacy   Email   Constituent360   Library   Data Management   Setup

Donation Management

| **Online Giving** | Donation Classic | Pending Contributions | Sustaining Gifts | Designated Giving | Membership Types | Donation Reports | General Configurations |

Campaigns

Create a New Campaign   **Upload Many Campaigns**

This is a list of Donation Campaigns that have been configured for your site. Use the Edit action to change information related to an overall campaign, such as the merch
forms that have been configured for a campaign or to create a new form. To set up a new campaign, use the Create a New Campaign button or Copy an existing campaig

Campaigns   **All Donation Forms**

Find the campaign and choose Manage

All My Categories ▼ Go

Records 1 - 1 of 1 First | Previous | Next | Last

gsc Search Show All   Page 1 of 1 To Page

Name	Actions	Status	Category	Type	Summary
Go! Forward GSC Test Campaign Campaign ID: 7641	Manage Edit Copy	Active	General	Fundraising	**Created:** 12/09/2012 13:03 by convio **Last Modified:**12/09/2012 13:04 by convio

Records 1 - 1 of 1 First | Previous | Next | Last

☐ **Show archived Donation Campaigns**
Archiving a Donation Campaign will remove it from the list unless you choose the Show archived Donation Campaigns option.

Click here to view introduction

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HOW DO I CONFIGURE THE GSC?

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➤ LINKING TO THE GSC

Personal Profile | Email Preferences | **Service Center**

Service Center

Recurring Giving

Go! Forward GSC Test Donation   [view details]
Active
Amount: **1.00** USD / Month
Next Payment: Oct 13, 2012
Previous Payment: Sep 13, 2012
                       View Payment History
CC Number: ************0557
CC Exp Date: 07 / 2014

Go! Forward GSC Test Donation   [view details]
Active
Amount: **1.00** USD / Month
Next Payment: Oct 13, 2012
Previous Payment: Sep 13, 2012
                       View Payment History
CC Number: ************0557
CC Exp Date: 07 / 2014

Go! Forward GSC Test Donation   [view details]
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Next Payment: Oct 13, 2012
Previous Payment: Sep 13, 2012
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CC Number: ************0557
CC Exp Date: 07 / 2014

➤ LINKING TO THE GSC

City: Austin
State/Province: TX
ZIP/Postal Code: 78758
Country: United States
Email Address: jori.taylor@blackbaud.com
Email opt-in: No
Payment Information
Payment type: Credit Card
Credit Card Number: ************0557
Pledge Amount: Not applicable
Pledge Payment Amount: $1.00
Tax-deductible Amount: $1.00
This organization's tax ID is: 23-7278002
Tracking Code: 3923-1281-3-6367-6388

Visit the Service Center to view or update your payment plan.

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➤ LINKING TO THE GSC

In the Autoresponder content (legacy code):

[[?xx::x[[S120:dc:recurringServiceCenterLinkForAR]]x:: ::

<p>Visit the [[S71:((S120:dc:recurringServiceCenterLinkForAR)):Service Center]] to view or update your payment plan.</p>

]]

From the WYSIWYG (updated code):

Visit the Service Center to view or update your payment plan.

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➤ LINKING TO THE GSC

City: Austin
State/Province: TX
ZIP/Postal Code: 78758
Country: United States
Email Address: jori.taylor@blackbaud.com
Email opt-in: No
Payment Information
Payment type: Credit Card
Credit Card Number: ************0557
Pledge Amount: Not applicable
Pledge Payment Amount: $1.00
Tax-deductible Amount: $1.00
This organization's tax ID is: 23-7278002
Tracking Code: 3923-1281-3-6367-6388

Visit the Service Center to view or update your payment plan.

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➤ SOME REMINDERS…

1. There are a few "sitewide" settings that need to be enabled before using the new Gift Service Center

2. You need to have a donation form that allows recurring donations

3. You **MUST** enable the donor self-service options on a form-by-form basis

4. The Gift Service Center will only be available for donors who have given a recurring or installment gift

5. In order to test the Gift Service Center, you **MUST** make an actual recurring gift

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GIFT SERVICE CENTER LAYOUT

Personal Profile | Email Preferences | **Service Center**

Service Center

Recurring Giving

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➤ GIFT SERVICE CENTER LAYOUT

Personal Profile | Email Preferences | **Service Center**

Welcome to your Gift Service Center! You can view information about your gift and make adjustments to payment information if necessary. We appreciate your continuing support of our organization.

Go! Forward GSC Test Donation Form

The donor can edit the credit card information

Active
Gift Processing

The donor can edit the gift details

Payment [edit]

Amount:	1.00 USD / Month
Next Payment:	10/13/2012

Skip Next Payment

Previous Payment:	09/13/2012

View Payment History

Discontinue Payments

Payment Method [edit]

Credit Card
************0557
Exp: 07/2014

Jori Taylor
Billing Address
11500 Burnet Road
Austin, TX 78758 United States

The donor can skip a payment (this link brings up a pop-up)

< View All Gifts

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GIFT SERVICE CENTER LAYOUT

➤ GIFT SERVICE CENTER LAYOUT

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RESOURCES

• Look at the Online Help Menu

• Feature Summary Document (Summer 2011)
http://community.convio.com/t5/Releases-Summer-2011-Feature/Fundraising-Recurring-Giving-Enhancements/td-p/21227

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QUESTIONS?