



► **MANAGING THE GIFT SERVICE CENTER**

How do I configure and link to the GSC?

► 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

► 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.



► 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



► 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 campaign.

Campaigns | **All Donation Forms**

All My Categories

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Page 1 of 1

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](#)

► 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](#) > Go! Forward GSC Test Campaign

[Create a Donation Form](#) | [Create a new form from scratch](#) | [Adjust Thermometer](#)

This is a list of all the donation forms that have been configured for your campaign. Use the Edit action beside each form to do any of the actions that were available when adding premiums, configuring autoresponders, and testing the form. Use the Publish action to make your form active immediately - overriding any schedule that has been set.

- Donation Form List -

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

[Search](#) [Show All](#)

Name	Actions	Status	User Category	Publish Schedule	Unpublished
Go! Forward GSC Test Donation Form Form ID: 11020 online-only	Preview Edit Save as Template Copy Unpublish	Published	General	12/09/2012 13:55	No

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Show archived Donation Forms
Archiving a Donation Form will remove it from the list unless you choose to Show archived Donation Forms.

▶ HOW DO I CONFIGURE THE GSC?

The screenshot displays the CONVIO LUMINATE interface. At the top, there is a navigation bar with links for Content, Fundraising, Advocacy, Email, Constituent360, Library, Data Management, and Setup. Below this is the 'Donation Management' section, which includes a sub-menu with 'Online Giving', 'Donation Classic', 'Pending Contributions', 'Sustaining Gifts', 'Designated Giving', 'Membership Types', 'Donation Reports', and 'General Configurations'. The current page is titled 'Go! Forward GSC Test Campaign' and 'Go! Forward GSC Test Donation Form'. A sidebar on the left lists seven steps: 1. Identify Donation Form, 2. Configure Donation Levels, 3. Design Donor Screens (highlighted with a red arrow), 4. Validate, 5. Configure Autoresponders, 6. Test Drive, and 7. Publish. A yellow callout box with a red dot points to the 'Design Donor Screens' step, containing the text 'Click Design Donor Screens'. A warning message at the top of the main content area reads: 'Warning! The form you are editing is either published or scheduled to be published automatically!'. The main content area contains several sections for configuration: 1. Name: 'Go! Forward GSC Test Donation Form'. 2. Public Name: 'English (United Kingdom)', 'English (United States)', 'English (Canada)', 'French (Canada)'. 3. Description: A large text area. 4. Security Category: 'General'. 5. Form Designee: A dropdown menu. 6. Interaction Mode: A dropdown menu.

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 > Go! Forward GSC Test Campaign > Go! Forward GSC Test Donation Form

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
4. Validate
5. Configure Autoresponders
6. Test Drive
7. Publish

Click Design Donor Screens

Warning! The form you are editing is either published or scheduled to be published automatically!

* 1. Name:
The form name is used internally. It will only be seen by you and other administrators.
Go! Forward GSC Test Donation Form

2. Public Name:
This name will be displayed in the browser's title bar.
English (United Kingdom) English (United States) English (Canada) French (Canada)

3. Description:
The form description is used internally for further identification.

* 4. Security Category:
The Security Category selected here will determine which administrators can manage this Donation Form and which end-users can see it.
General

5. Form Designee:
The form designee will assign all funds collected with this form to a specific designee. If you choose a designee here, the Designated Giving will be assigned to that designee.
[Dropdown]

6. Interaction Mode:

▶ HOW DO I CONFIGURE THE GSC?



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 > Go! Forward GSC Test Campaign > Go! Forward GSC Test Donation Form

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
4. Validate
5. Configure Autoresponders
6. Test Drive
7. Publish

- Related Actions
- ▶ Customize Look and Feel
 - ▶ Configure Service Center

Warning! The form you are editing is either published or scheduled to be published automatically!

This is a list of the end-user pages associated with your form. If you plan to use the optional Splash Page to provide background about your fundraiser, those pages will automatically be visible to your donors. Use the Preview action to view the content on each of those pages and use the Edit action to modify the content.

Important: You can edit individual fields of the Donation Form from the Preview, but you will need to use the Edit action for that entire page to add, delete, or modify the page.

- Donor Screens -

Name	Actions	Status	Date Last Modified	Description
Donation Form	Edit Publish	✗ Not using this page		An optional page that can be used to provide background about your fundraiser.
Donation Form	Preview Edit	— Using default content		The actual form that will be presented to the donor.
Thank You Page	Preview Edit	— Using default content		The onscreen thank you page that follows the donation.
Transaction in Progress Page	Preview Edit	— Using default content		A warning page that will be displayed if a donor's donation is not successful.

Click Configure Service Center

Next or Cancel

▶ 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 > Go Forward GSC Test Campaign > Go Forward GSC Test Donation Form > Configure Service Center

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
 - a. Configure Service Center
4. Validate
5. Configure Autoresponders
6. Test Drive
7. Publish

Warning! The form you are editing is either published or scheduled to be published automatically!

*** 1. Gift Service Center HTML Caption:**
Enter content to display to donors who access their Gift Service Center for information about a sustaining or installment plan gift they have made using this donation form configured globally for the Gift Service Center, which may be useful if you want to refer specifically to the purpose of this donation form. You can include text, image

-- Personalization -- -- Conditionals -- -- Components -- -- Links --

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.

2. Gift Payment Modification Options
Click the checkbox for each action that you want donors to be able to perform in the Gift Service Center for sustaining or installment plan gifts they have made using the Gift Service Center to see their gift information but will not be able to make any modifications to their gift.

- Yes, allow donors to modify their billing information
- Yes, allow donors to discontinue payments for this gift
- Yes, allow donors to skip their next gift payment
- Yes, allow donors to modify the gift amount
- Yes, allow donors to modify the date of their next gift payment

Finish or Cancel

2. Gift Payment Modification Options
Click the checkbox for each action that you want donors to be able to perform in the G options, donors can access the Gift Service Center to see their gift information but will

- Yes, allow donors to modify their billing information
- Yes, allow donors to discontinue payments for this gift
- Yes, allow donors to skip their next gift payment
- Yes, allow donors to modify the gift amount
- Yes, allow donors to modify the date of their next gift payment

▶ 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](#)]
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

► 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.

► 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 <a href="http://[short_name].convio.net/site/ServiceCenter?pg=list">Service  
Center</a> to view or update your payment plan.
```

▶ LINKING TO THE GSC?

convio LUMINATE

Hello, System Administrator | Help | Log Out | Log In as Admin
Ventura County Rescue Mission CONVIO ADMIN on rma Spam Complaints: 1.13% (Dangerous) (updated 2012-09-13)

Content Fundraising Email Constituent360 Library Data Management Setup Luminate Online

Donation Management

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

Campaigns > Manage > Go! Forward GSC Test Donation Form > Sustaining Initial Thank You

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
4. Validate
5. Configure Autoresponders
 - a. Envelope
 - b. Edit HTML Content
 - c. Update Plain Text
6. Test Drive
7. Publish

*** 1. HTML Content:**
Defines the text, images, and links to display in the message body to recipients who can view HTML-formatted email (click the Save button often to avoid losing your work if you spend time creating the message here rather than pasting it in from another source)

Use Plain Text Editor Help

Paragraph Styles Font family Font size B I U A ab a

Please print or save this message for your personal records. You can use this page as a receipt for tax purposes.

Transaction Summary

Object Property Value

Visit the [Service Center](#) to view or update your payment plan.

Path: p > a

Next Save or Cancel

► LINKING TO THE GSC?

The screenshot displays the Convio LUMINATE interface. At the top, the logo and navigation menu are visible. The main content area shows the 'Donation Management' section with a sidebar of steps. A modal window titled 'Insert Link' is open, containing fields for Link URL, Anchors, Target, Title, and Class. Two buttons, 'Browse Convio Links' and 'Browse CMS Links', are located at the top right of the modal. A red arrow points to the 'Browse Convio Links' button. The 'Update' and 'Cancel' buttons are at the bottom of the modal.

convio LUMINATE

Hello, System Administrator | Help | Log Out | Log In as Admin

Ventura County Rescue Mission CONVIO ADMIN on rma Spam Complaints: 1.13% (Dangerous) (updated 2012-09-13)

Content Fundraising Email Constituent360 Library Data Management Setup Luminate Online

Donation Management

Online Giving Donation Classic Pending

Campaigns > Manage > Go Forward GSC Test Donor

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
4. Validate
5. Configure Autoresponders
 - a. Envelope
 - b. Edit HTML Content
 - c. Update Plain Text
6. Test Drive
7. Publish

1. HTML Content Editor
Defines message content and format.

Please review the content and format of the message before clicking the Update button.

Transcript
Obtain a transcript of the message content.

Visit the message in the system.

Path: p

Next

Insert Link

Link URL:

Anchors:

Target:

Title:

Class:

Browse Convio Links Browse CMS Links

Update Cancel

▶ LINKING TO THE GSC?

The screenshot shows the Convio LUMINATE interface with the 'Insert Link' dialog box open. The dialog box has a 'Choose Link' section with a list of link types and a table of selected links. Red arrows point to 'Gift Service Center' in both the list and the table.

Link Type List:

- Search Campaign
- eCommerce Product
- eCommerce Store
- Email Message
- Events
- Facebook Pages
- Gift Service Center**
- National Teams
- Page Navigator
- PageBuilder
- Personal Events Activity
- Personal Fundraising Campaign
- Photo Album

Table:

Name	Id	Description
Gift Service Center	1	The Gift Service Center allows the user to modify their sustaining gifts.

Buttons: Back, Cancel

Page Navigation: 1-1 of 1 << first < prev 1 next > last >>

► LINKING TO THE GSC?

The screenshot shows the Convio LUMINATE interface with the 'Insert Link' dialog box open. The dialog box contains the following sections:

- Set Link Options**
 - Link URL:
- Additional Link Options**
- User Processing (not required)**
 - Interest: Add this interest to the user's profile. Remove this interest from the user's profile.
- Advanced Options (not required)**
 - Promotion Code:
 - Page Wrapper:
 - Enter Additional Arguments:

Red arrows point to the 'Link URL' field and the 'Page Wrapper' dropdown menu.

▶ LINKING TO THE GSC?

The screenshot shows the Convio LUMINATE administration interface. At the top left is the logo for Convio LUMINATE. At the top right, it says 'CONVIO ADMIN on vateam'. Below the logo is a navigation bar with links: Content, Fundraising, Advocacy, Email, Constituent360, Library, Data Management, and Setup. The main heading is 'Donation Management'. Below this are several tabs: Online Giving, Donation Classic, Pending Contributions, Sustaining Gifts, Designated Giving, Membership Types, Donation Reports, and General Configurations. A breadcrumb trail reads: Campaigns > Manage > Go! Forward GSC Test Donation Form > Sustaining Initial Thank You. On the left side, there is a list of steps: 1. Identify Donation Form, 2. Configure Donation Levels, 3. Design Donor Screens, 4. Validate, 5. Configure Autoresponders (with sub-steps a. Envelope, b. Edit HTML Content, c. Update Plain Text), 6. Test Drive, and 7. Publish. Step 5b, 'Edit HTML Content', is highlighted. The main content area shows a configuration window for '1. HTML Content:'. It defines the text, images, and links to display in the message body. There are tabs for language selection: English (United Kingdom), English (United States), English (Canada), and French (Canada). Below the tabs is a rich text editor toolbar with options like Paragraph, Styles, Font family, Font size, Bold, Italic, Underline, Text color, Background color, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, Image, Table, and others. The text area contains the following content:

Transaction Summary

[[[S120:dc:transactionSummary]]] There's your link ready to go!

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

Path: p

At the bottom of the configuration window are buttons for 'Next', 'Save', and 'or Cancel'.

► 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.

► 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



► GIFT SERVICE CENTER LAYOUT

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]
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

► 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](#)

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

Payment Method [[edit](#)]

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

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

[< View All Gifts](#)

► 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

Active

Gift Processing

Payment

Indicates Required

Amount: USD / Month

Next Payment:

[Save Changes](#)

[Cancel](#)

[Skip Next Payment](#)

Previous Payment: 09/13/2012

[View Payment History](#)

[Discontinue Payments](#)

The donor can edit the gift amount

Payment Method

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

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

The donor can edit the date of the next gift

[Cancel](#)

► 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

Active

Gift Processing


Payment

Amount: 1.00 USD / Month
Next Payment: 10/13/2012
[Skip Next Payment](#)

Previous Payment: 09/13/2012
[View Payment History](#)

[Discontinue Payments](#)

Indicates Required

Credit Card Type 

► Credit Card Number

► Verification Code [What is this?](#)

► Expiration Date 09 ▼ 2012 ▼

Billing Name

Title

► First Name

Middle Name

► Last Name

Suffix

Billing Address

► Street

► City

► State

► Zip/Postal Code

Country

[Update Payment Information](#) [Cancel](#)

► 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>



► **QUESTIONS?**