> 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



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HOW DO I CONFIGURE THE GSC?

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Levels	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
3. Design Donor Screens	Personalization 💽 Compionals 💽 Components 💽 Links
a. Configure Service Center4. Validate	
5. Configure Autoresponders	You can view information about your gift and make adjustments to payment information if necessary. We appreciate your continuing support of our organization.
6. Test Drive	
7. Publish	
	1. 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
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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]
Amount:	1.00 USD / Month
Next Payment:	Oct 13, 2012
Previous Payment:	Sep 13, 2012
595530045 A 20	View Payment History
CC Number:	**************************************
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.

2

> LINKING TO THE GSC

In the Autoresponder content (legacy code):

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

<vi>view or update your payment plan.

From the WYSIWYG (updated code):

11

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

► LINKING TO THE GSC?

Donation Manage	ment								
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LINKING TO THE GSC?

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► LINKING TO THE GSC?

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► LINKING TO THE GSC?

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2. Configure Donation Levels	Defines messag	User Processing (not required) You can also designate that anyone who clicks this link is interested in a particular category. The user's interest profile will be automatically updated.	losing your work if you spend time creating the
3. Design Donor Screens			
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Configure Autoresponders	<u>A</u>		
a. Envelope	<u>.</u>	Advanced Options (not required) If some of the content on the target of this link is only available with certain program codes, you can enter one of those codes here to make the content visible	
b. Edit HTML Content	Plance	when this link is selected.	
c. Update Plain Text	Please receipt	Promotion Code:	
5. Test Drive	Trans	Optionally choose a page wrapper for the target page	
7. Publish	Ob	Page Wrapper: Select a Page Wrapper	
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		Enter Additional Arguments:	
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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.

2

► SOME REMINDERS...

- 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
- 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

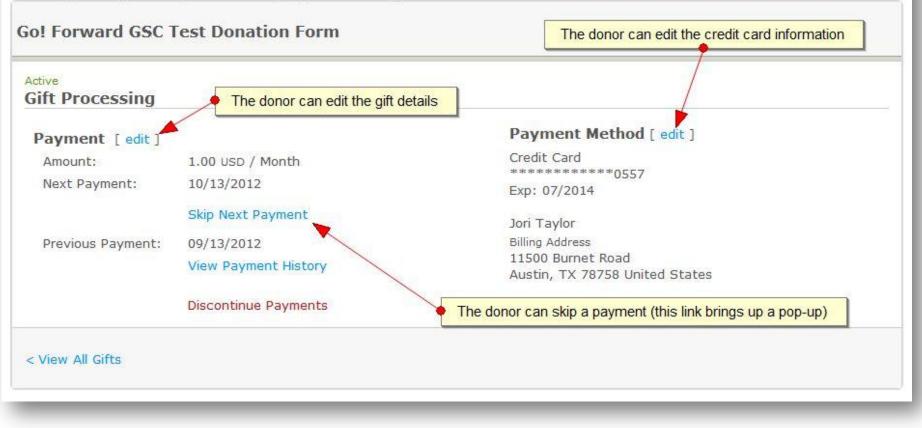


Personal Profile Email Preferences Service Center

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

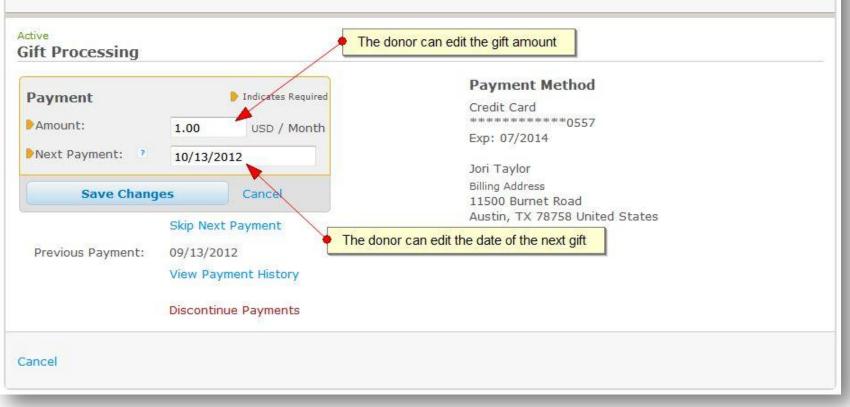


12/4/2012 Blackbaud Confidential

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



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.

_{ctive} Sift Processing			
Payment			👂 Indicates Required
Amount:	1.00 USD / Month	Credit Card Type	
Next Payment:	10/13/2012	n	
	Skip Next Payment	Credit Card Numbe	er
Previous Payment:	09/13/2012	Verification Code	What is this?
	View Payment History	Expiration Date	09 👻 2012 💌
	Discontinue Payments	Billing Name Title	-
		First Name Middle Name	Jori
		Last Name	Taylor
		Suffix	
		Billing Address	
		Street	11500 Burnet Road
		City	Austin
		State	TX ·
		Zip/Postal Code	78758
		Country	United States

> 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?