Gift Aid

Platform	Luminate Online
Module	Online Fundraising and TeamRaiser
Configuration	Feature is automatically available to clients configured with the UK as the locale. Some setup is required.

Our team is committed to helping you get the most out of every relationship and inspire your creativity to deliver engaging experiences for your constituents so you can do even more for your mission. The Summer 2012 release of Convio Luminate™ is packed with enhancements designed to connect more people to your cause, enhance the user's experience, allow you to better measure and test your strategies, and offer new ways to deliver web-based content and leverage our open platform – all while making optimal use of your staff's valuable time.

This document describes the feature "Gift Aid", explains how to configure and use it, and offers tips for taking full advantage of its benefits. Please visit the release resource center to read more about the exciting features in this release.

OVERVIEW

This feature provides enhanced support for the capture of Gift Aid declarations on donation forms that are used for either direct donations to an organization or to a TeamRaiser event. The new functionality enables organizations to capture the declaration and clarify eligibility of Gift Aid for an individual donation. It will also help organizations better market the value of Gift Aid to TeamRaiser events and make the Gift Aid declarations available for download to the organisations's database of record for reporting to the HMRC.

FEATURES AND BENEFITS

Features

- ✓ Increasing the flexibility that clients have over where and how the Gift Aid declaration appears
- ✓ Adding display of added Gift Aid value to constituent-facing pages in TeamRaiser
- ✓ Improving tracking of Gift Aid eligibility for an individual gift

Benefits

- ✓ The constituent user interfaces for Gift Aid declarations will be based on the latest best-practices.

✓ Clients will have more flexibility to display Gift Aid according their own internal business rules

✓ Increased Gift Aid opt-ins will result in higher revenue for UK charities

COMMON SCENARIOS

The changes to Gift Aid will improve the user experience for Site and TeamRaiser Event Administrators, TeamRaiser Event Managers, and constituent donors and TeamRaiser participants in the following ways:

- When a Site or TeamRaiser Event Administrator configures a gift donation form, they can choose to implement a "single checkbox" Gift Aid declaration or add checkboxes for the donor to designate why their gift is ineligible for Gift Aid.

- When a Site or TeamRaiser Event Administrator, Event Manager, or TeamRaiser participant enters or uploads an offline donation for a TeamRaiser event, they can now indicate if that gift is eligible for Gift Aid.

- When downloading transaction information for a donation, Site Administrators can identify if the donor made a universal Gift Aid declaration and/or indicated that an individual donation was eligible for Gift Aid.

- Throughout TeamRaiser, cumulative totals displayed to indicate the amount of funds raised for the event, by a specific team, or by a specific participant, the added value being provided by Gift Aid will also display next to that cumulative amount.

CONSIDERATIONS

Support for Gift Aid in "top up" donations made at the time of TeamRaiser registration

TeamRaiser offers the ability for organizations to accept "top up" donations at the time that a participant is registering for a TeamRaiser Event. At this time, it is not possible to capture a Gift Aid declaration for this type of donation.

UK Only

Gift Aid is only available on instances of Luminate Online which are configured with UK as their locale.

GETTING STARTED

Making Gift Aid Available on a Site

A site configured for UK automatically has the Gift Aid feature enabled, which means that:

- Site Administrators can insert a Gift Aid component to donation forms to make the Gift Aid declaration available to constituents who make donations to your organization, including team fundraising events.

- Site Administrators, TeamRaiser Administrators, TeamRaiser Event Managers with the appropriate permissions, can enter gifts with Gift Aid declarations that are received offline, and if allowed (controlled by site and event options), TeamRaiser participants can also enter cash and check gifts that donors give or promise to them.

- Site Administrators, TeamRaiser Event Administrators, and TeamRaiser Event Managers with the appropriate permissions can upload gifts with Gift Aid declarations in bulk and confirm gifts with Gift Aid declarations entered manually offline.

- Calculated match rates are based on the tax rates of the HMRC and will be updated appropriately in the system when the HMRC releases revised rates.

Enabling the Gift Aid Option for Offline Gifts in a TeamRaiser Event

You must set an Advanced Event Option in the TeamRaiser configuration to allow TeamRaiser Event Administrators, Event Managers, and participants to click the Gift Aid checkboxes (on behalf of the donor) when they enter gifts the donor gives or sends them. You can also customize the text to display with the Gift Aid checkbox on offline gift entry forms.

1. From an Administrator page, click **Fundraising > TeamRaiser**.

2. From the TeamRaisers list page, click **Edit** from the **Actions** column of the appropriate TeamRaiser event

| TeamRaiser List | Cross-Event Teams | Registration Upsells | Event Managem |

TeamRaiser List

Create a TeamRaiser   **Create Many TeamRaisers**

This is the list of TeamRaiser events created for your site. Use the Edit action to
and email messages for a TeamRaiser. Use the Manage action to work with parti
involved in a TeamRaiser as well as create and send emails to coach people who
action to remove a TeamRaiser from view in this list, and use the Show Archived
TeamRaisers in the list again. To create a new TeamRaiser, click Create a Team

TeamRaisers

Records 1 - 4 of 4   First | Previous | Next | Last

[   ] [Search] [Show All]

TeamRaiser Name ⬍	Action	Status
TEST ID: 1003	Edit Copy Manage	**Accepting Registrations and Gifts** Published Date: June 04, 2012 Unpublished Date: N/A

3. From the tasks along the left on the **Identify TeamRaiser** page, click **Select Event Options**.

4. From the **Related Action**s section on the **Select Event Options** page, click **Edit Advanced Options**.
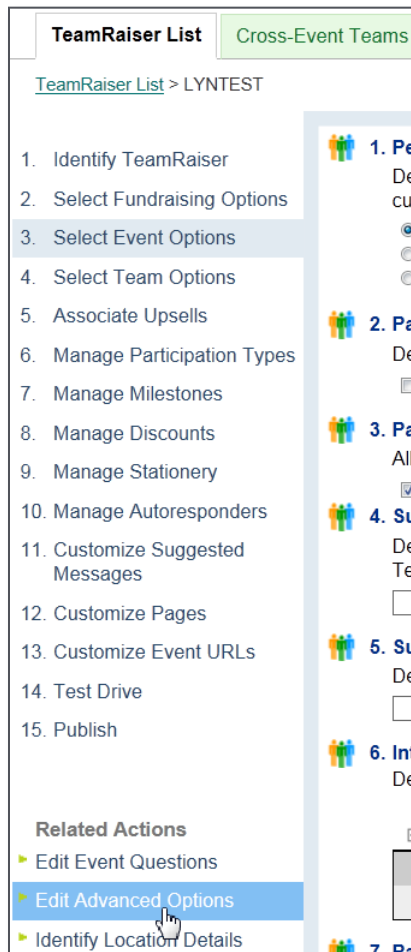
5. On the **Define Fundraising Options** page, scroll to the step containing the words "**Gift Aid for Online Gifts**".

6. Click the **Yes, allow Gift Aid to be declared for offline gifts** checkbox.

7. Optionally modify the text entered in the Gift Aid field below the checkbox.

8. Scroll to the bottom of the page and click **Save**.

Inserting the Gift Aid Component on a Donation Form

The standard Gift Aid component displays as a section within a UK donation form as shown in the following.

The default configuration of the templates for the **UK Credit Card Donation Form** and **UK Direct Debit Donation Form** include this component. However, you may need to add it to an existing form or another type of form that you configure.

You can customize the text displayed for the Gift Aid Declaration checkbox. You can also enable options for donors to select if they would like to make a Gift Aid declaration but this specific gift is not eligible to be gift aided.

The gift ineligibility checkboxes do not display unless the Gift Aid Declaration checkbox is checked. You can make the Declaration checkbox checked by default to have the ineligibility options displayed by default.

After creating a new donation form or if you are editing an existing form:

1. On the **Design Donor Screens** page, click **Edit** from the **Actions** column of the donation form.

   To display the Design Donor page, click Fundraising > Donation Management > All Donation Forms > Edit.

2. In the **Arrange the order of the elements** pane (on the right), position your cursor below the element that the Gift Aid data element follows on the form.

3. In the **Select Data Elements** pane, scroll to the Payment Fields, click **Gift Aid (UK)** and then click **Add**. (You can change the position later using the arrows on the ORDER bar.)

4. Click the **Add >** arrow in the middle of the pane to move it.

5. Click **Save Order and Edit Selected**.

6. To look at the form with the default elements, click **Preview** from the bottom of the page.

7. To customize the component, in the **Edit Data Element** pane on this page, for

    a. **Section Label** (1), make any necessary changes to the text.

    b. **Gift Aid Description** (2), to:

        ▪ Hide the description or hint that displays on the donation form with the Gift Aid section label, click the checkbox.

        ▪ Change or add information, click into the editor and make your modifications.

    c. **Gift Aid Declaration** (3), modify the text that displays to the right of the checkbox. (no formatting).

    d. **Default state** checkbox (4), click the checkbox to display the checkbox with a checkmark.

        ✎ *This is especially important if you want to display the gift ineligibility checkboxes.*

8. For the **Gift Aid Ineligible Reasons**, click the appropriate checkbox and then modify the checkbox text if necessary (By default, these statements do not display until the Gift Aid eligibility declaration checkbox contains a checkmark. If you do not click the Default State checkbox, these items remain hidden until the donor clicks the checkbox.)

9. When you are finished, click **Save**.

10. To be sure the Gift Aid component is formatted properly:

a. Click the **Preview Data Element** tab.

b. Check to be sure the:

- Text and labels look correct.
- Default State checkbox contains a checkmark if you clicked it.
- Gift Ineligible reasons display if you have configured them and the Default State checkbox contains a checkmark.

c. To make modifications, click the **Edit Data Element** tab and refer to the previous steps.

11. To display the entire donation form to view the Gift Aid component in the Payment Information area:

a. Click **Preview** (at the bottom of the page) and check to be sure the form is correct.

b. If you need to make any modifications, click the **Edit Data Element** tab and refer to the previous steps.

12. When you are done adding data elements, click **Finish** (at the bottom of the Data Elements page).

Making an Online Donation

After a person clicks a link on the site or in an email to make a donation, they enter or select a gift amount and then click **Gift Aid** checkbox to declare their Gift Aid eligibility.

If the Ineligible Reasons are displayed, the donor can click the appropriate reason for the exception

After clicking **Next**, the donor reviews the **Transaction Summary** to view Gift Aid details in the **Gift Information** section and then clicks **Process**.

Main Menu	My Account TeamRaisers Survey Stores	English (en_GB) ▼ 🇬🇧

① Gift & Payment Information ———— ❷ **Review Gift**

Transaction Summary

Transaction Date:	01/06/12
Gift Information	
Amount:	£50.00
Gift Aid:	£12.50
Payment Information	
Payment type:	Credit Card
Credit Card Number:	************1111
Personal Information	
Title:	
First Name:	Pat
Last Name:	Brown
Email Address:	Pat@convio.com
Email opt-in:	Yes
Address Information	
Country:	United Kingdom
Postcode:	HP5 1HY
Address 1:	1 Old Bells Court
Address 2:	Church Street
Address 3:	
Town:	Chesham
County:	Buckinghamshire

[Previous]   [Process]   [Cancel]

The donor reviews the Gift Aid detail in the **Gift Information** section of the **Donation Confirmation** page and prints it for a receipt.

| Main Menu | My Account | TeamRaisers | Survey | Stores | English (en_GB) ▼ 🇬🇧 |

Dear Pat,

We are deeply grateful for your generosity and support of our efforts. Your gift makes a difference — it enables us to provide vital services to the community we serve. We count on you and people like you to ensure that we can continue providing these services.

Once again, thank you for your support.

Sincerely,

Run For Your Life Administrator

Please print the following for your records:

Transaction Summary

| Transaction Date: | 01/06/12 |

Gift Information

| Amount: | £50.00 |
| Gift Aid: | £12.50 |

Payment Information

| Payment type: | Credit Card |
| Credit Card Number: | ************1111 |

Personal Information

Title:	
First Name:	Pat
Last Name:	Brown
Email Address:	patbrown@friends.net
Email opt-in:	Yes

Address Information

Country:	United Kingdom
Postcode:	HP5 1HY
Address 1:	1 Old Bells Court
Address 2:	Church Street
Address 3:	
Town:	Chesham
County:	Buckinghamshire
Tracking Code:	210-1004-1-1035-1036

[Return to our Home Page](#)

Later, the donor checks email and opens the Thank You autoresponder email, which contains the Gift Aid detail.

Dear Pat,

Thank you for supporting one of our volunteer fundraisers. Your generous gift will make us successful.

If you would like to participate or learn more about our cause and other opportunities to support us, please visit our Web site at www.RFYL2012.com .

Sincerely,

Test Site

Please print or save this message for your personal records.

Event/Donation Form: TeamRaiser Event 2012
In Support Of: Run For Your Life 2012 World Event
Date: 01-Jun-2012 22:01:50
Amount: £50.00
Gift Aid: £12.50
Tracking Code: 210-1004-1-1035-1036

Uploading Gift Aid-Designated Gifts in Bulk

A TeamRaiser Site or Event Administrator and Event Manager with the appropriate permissions can upload gifts in bulk with the Gift Aid designation and amounts.

Uploading a Gift File in the Administrator Interface

The upload file must be prepared in advance in the comma-separated values (csv) format for upload and can require certain fields. From the Uploads page, you can:

- Create the file using a sample .csv gift upload file
- Define the required fields that must be in the upload file and must contain a non-null value
- Name and upload the file to send the file to the Upload queue for processing

Creating a File Using the Sample CSV Gifts Upload File

1. From an Administrator page, click **Fundraising > TeamRaiser**.

2. From the **TeamRaisers List** page, click **Uploads** from the tabs along the top.
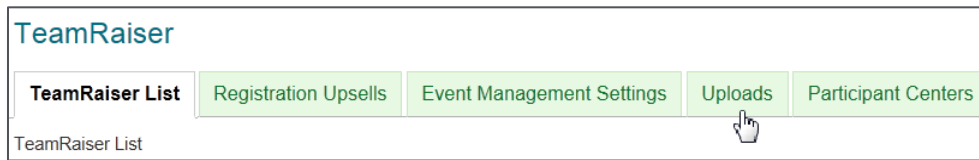
3. On the **Uploads** page, click **Upload Gifts**.

4. On the **Configure Parameters** page, click **Upload File**.

5. On the **Upload File** page, click **SampleGiftUpload.csv** to open the file.

6. Make modifications to the sample file to fit your organization and save it as csv file.

Defining Fields Required for the Upload

1. From **Related Actions** on the **Upload Gifts** page, click **Define Required** Fields.

    📝 *To display the **Upload Gifts** page, click **Fundraising > TeamRaiser > Uploads (tab) > Upload Gifts**.*

2. On the **Define Required Fields** page, click the appropriate checkboxes of fields that must be in the upload file and must contain a non-null value. (Note the addition of the Gift Aid checkbox for UK TeamRaiser uploads.)

3. Click **Finish**.

Naming and Uploading the File

1. On the **Configure Parameters** page, enter information and click the appropriate checkboxes, and then click **Next**. (Tip: Replace the **Upload Name** default with a label that will help identify this as a **Gift Upload** for a TeamRaiser event.)

    📝 *To display the **Configure Parameters** page, click **Fundraising > TeamRaiser > Uploads** (tab) **> Upload Gifts**.*

2. On the **Upload File** page, click **Browse** and locate the file (on your computer or shared network resource).

3. To be sure you have selected the correct file, click **Preview** to view the first few lines of the selected file.

4. If the file is correct, click **Finish.**

You can return to the **Uploads List** page to determine when the file has completed, its success, and so on. For more complete information, refer to the existing online help about Managing TeamRaiser Gift Uploads topic.

Uploading a Gift File in the Event Management Center Interface

The upload file must be prepared in advance in the comma-separated values (csv) format for upload. From the Uploads page, you can:

- Create the file using a sample .csv gift upload file
- Name and upload the file to send the file to the Upload queue for processing

Creating a File Using the Sample CSV Gifts Upload File

1. After logging into the Event Management Center, click the **Customer Service** tab from along the top.
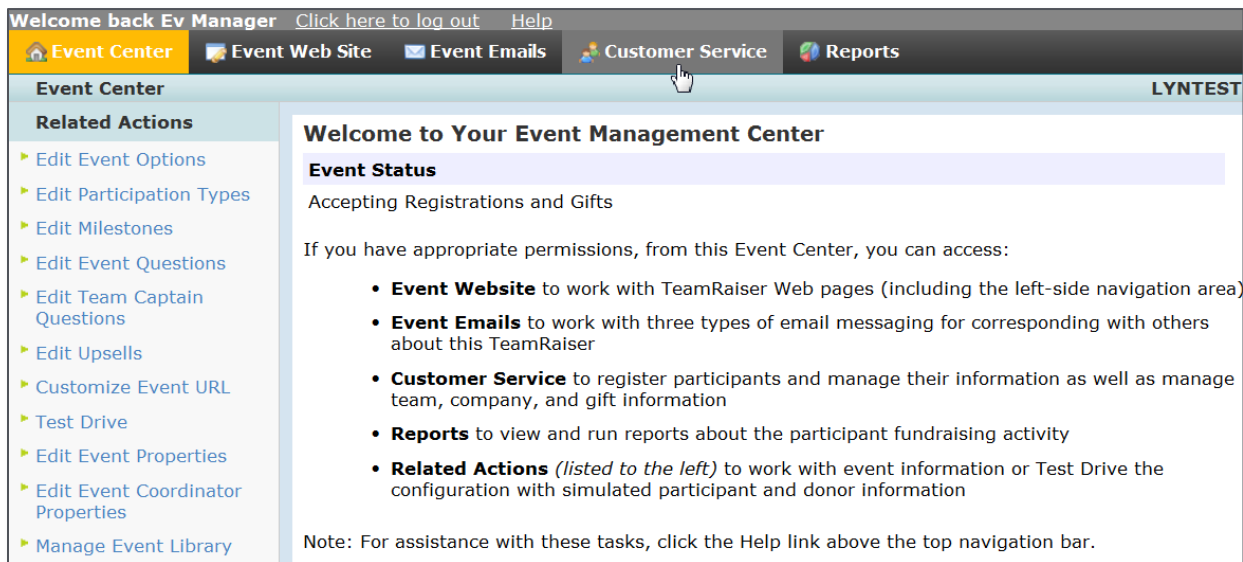
2. From the **Related Actions**, click **Upload Files**.
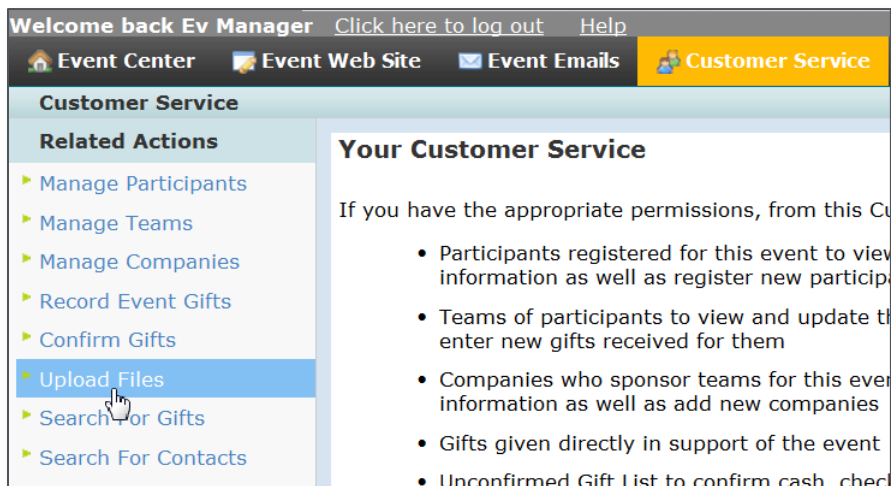
3. From the **Related Actions** on **the Upload Files** page, click **Upload Gifts**.
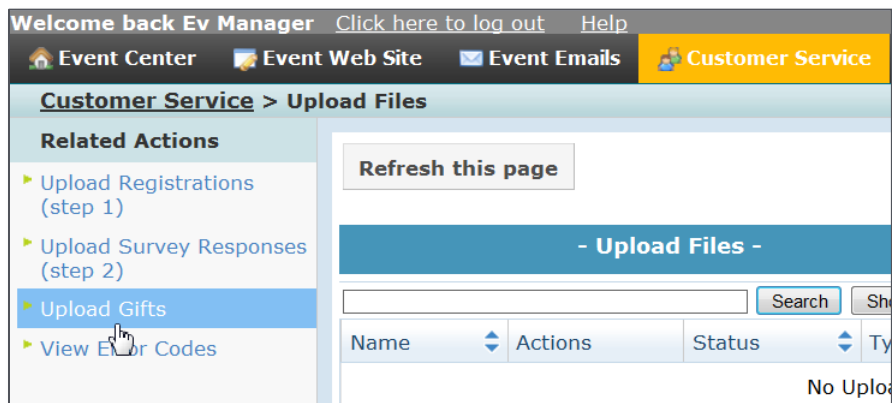
4. On the **Set Options** page, click **Upload File**.

5. On the **Upload File** page, click **SampleGiftUpload.csv** to open the file.

6. Make modifications to the sample file to fit your organization and save it as csv file.

Naming and Uploading the File

1. On the **Set Options** page, enter information and click the appropriate checkboxes, and then click **Next**.
    (Tip: Replace the **Upload Name** default with a label that will help identify this as a **Gift Upload** for a TeamRaiser event.)

    📝 *To display the* **Set Options** *page, click* **Customer Service > Upload Files > Upload Gifts**.

2. On the **Upload File** page, click **Browse** and locate the file (on your computer or shared network resource).

3. To be sure you have selected the correct file, click **Preview** to view the first few lines of the selected file.

4. If the file is correct, click **Finish.**

You can return to the **Uploads List** page to determine when the file has completed, its success, and so on. For more complete information, refer to the existing online help about uploading TeamRaiser gifts topic.

Entering Offline Donations for TeamRaiser Events in the Administrator Interface

Site and Event Administrators with the appropriate permissions can enter donations they receive in support of a:

- Participant
- Team
- Event itself

To perform the procedures below, you must have a TeamRaiser created with the Gift Aid advanced option enabled (refer to page 1).

Entering an Offline Donation Received in Support of a TeamRaiser Participant

1. From an Administrator page, click **Fundraising > TeamRaiser**.

2. From the **TeamRaisers** list page, click **Manage** for the appropriate TeamRaiser.

3. **Search** for the participant and click their name link from the search results displayed in the **Participants** List.

4. In the **Gift History** on the Registration page of the participant, click **Enter Offline Gift**.

5. On the **Choose Donor** page:

   • Click **New Donor** and enter the donor information and click **Create**.

   • Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.

6. On the **Configure Gift** page, enter and select the appropriate information and click **Process**.

Entering an Offline Donation Received in Support of a TeamRaiser Team

1. From an Administrator page, click **Fundraising > TeamRaiser**.

2. From the **TeamRaisers** list page, click **Manage** for the appropriate TeamRaiser.

3. Click the **Teams** tab (at the top of the page).

4. From the **Teams** list, click **Manage** from the **Actions** column of the appropriate team.

5. From the **Related Actions**, click **Record Team Gift**.

6. On the **Choose Donor** page:

   - Click **New Donor** and enter the donor information and click **Create**.

   - Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.

7. On the **Configure Gift** page, enter and select the appropriate information and click **Process**.

Entering an Offline Donation Received for the TeamRaiser Event

1. From an Administrator page, click **Fundraising > TeamRaiser**.

2. From the **TeamRaisers** list page, click **Manage** for the appropriate TeamRaiser.

3. Click the **Event Gifts** tab from the top of the **Participant Search** page.
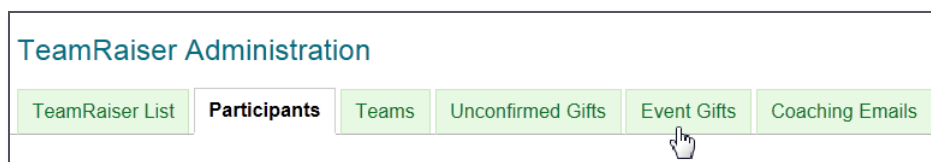
4. From **Related Actions**, click **Record Event Donation**.
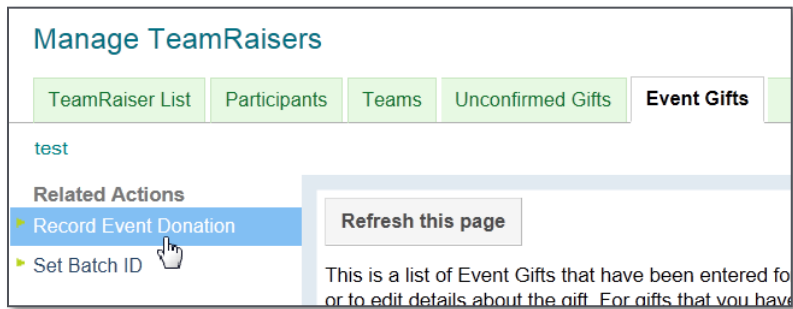
5. On the **Choose Donor** page:

-   Click **New Donor** and enter the donor information and click **Create**.

-   Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.

6. On the **Configure Gift** page, enter and select the appropriate information and click **Process**.

Entering Offline Donations for TeamRaiser Events in the Event Management Center

Event Managers with the appropriate permissions can enter donations they receive in support of a:

-   [Participant](#)

-   [Team](#)

-   [Event itself](#)

Entering an Offline Donation Received in Support of a TeamRaiser Participant

1. After logging into the Event Management Center, click the **Customer Service** tab from the options along the top.
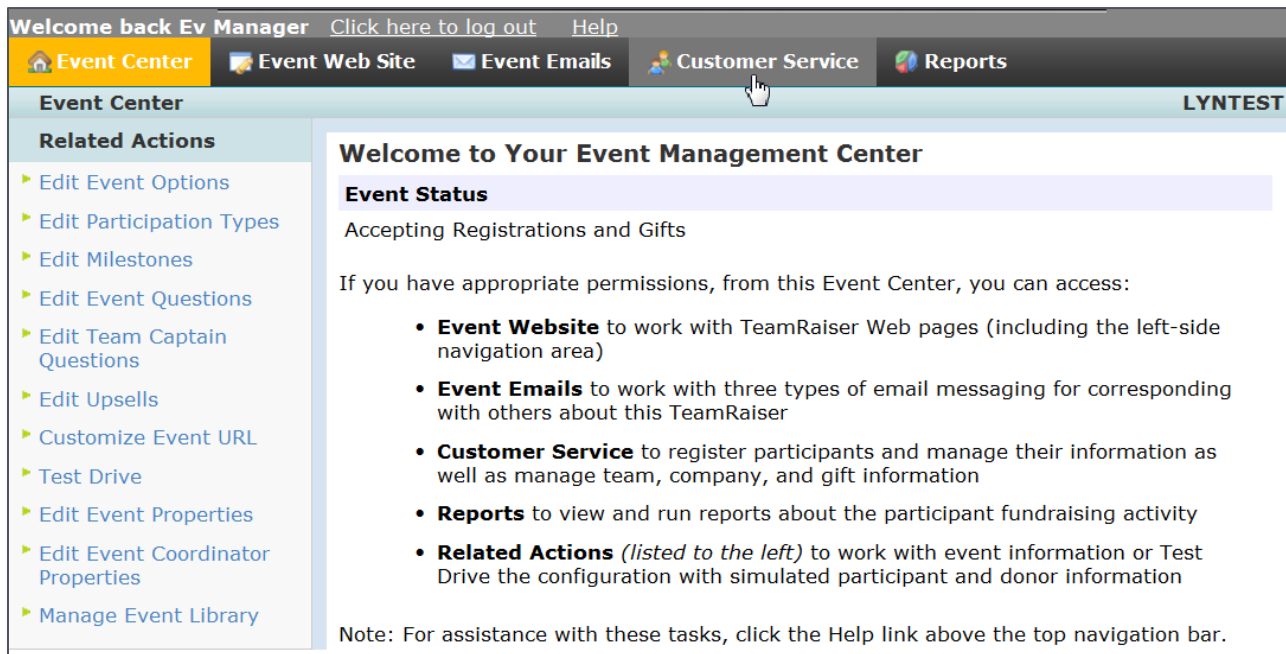
2. From the **Related Actions**, click **Manage Participants**.
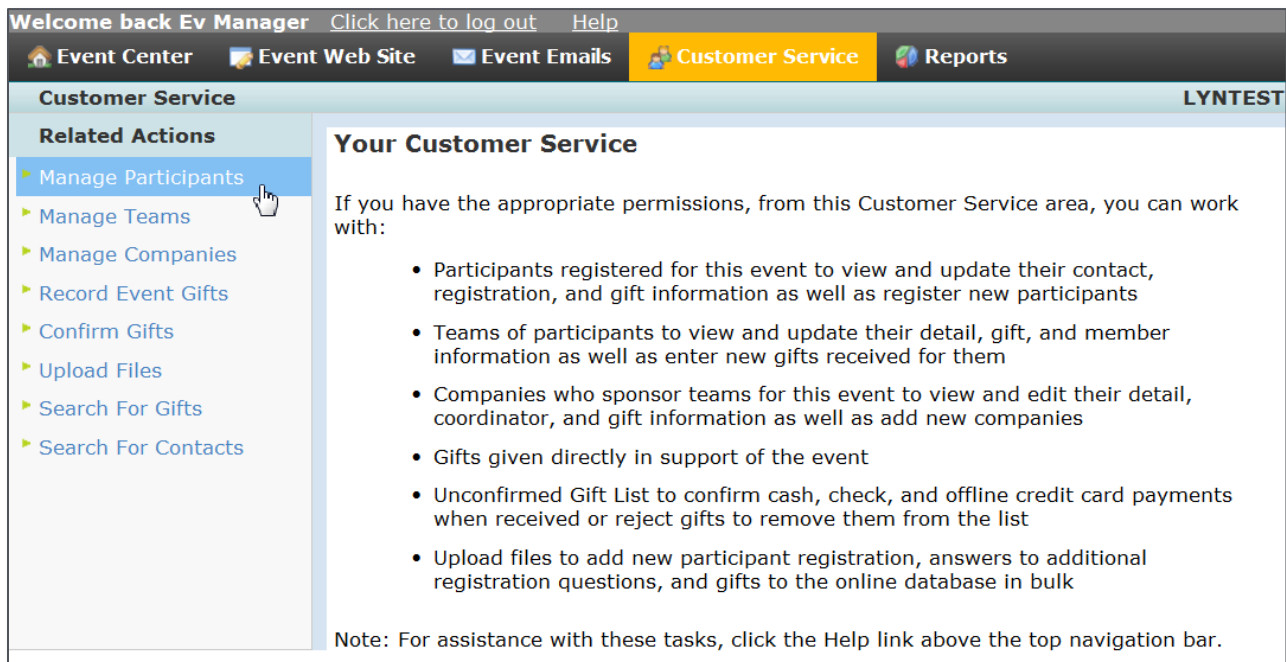
3. From the Participants list, click **Manage Participant** from the **Actions** column of the appropriate participant.

4. From the **Related Actions**, click **Record new donation**.

5. On the **Choose Donor** page:

   • Click **New Donor** and enter the donor information and click **Create**.

   • Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.

6. On the **Configure Gift** page, enter and select the appropriate information and click **Process (**The **Gift Aid** step is new.)

Entering an Offline Donation Received in Support of a TeamRaiser Team

1. After logging into the Event Management Center, click the **Customer Service** tab from the options along the top.

2. From the **Related Actions**, click **Manage Teams**.
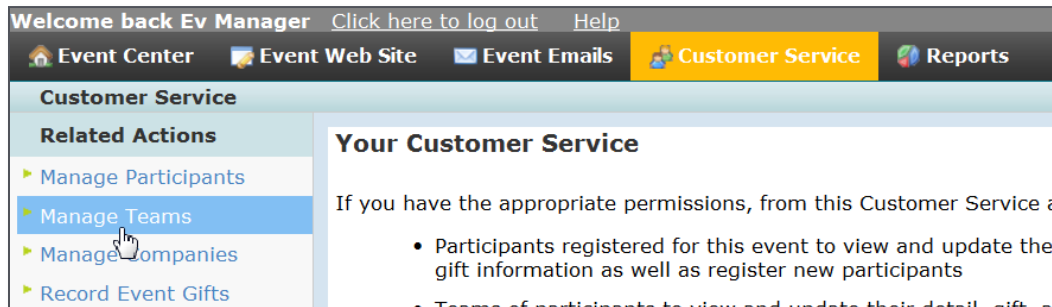
3. From the **Teams** list, click **Manage** from the **Actions** column of the appropriate team.
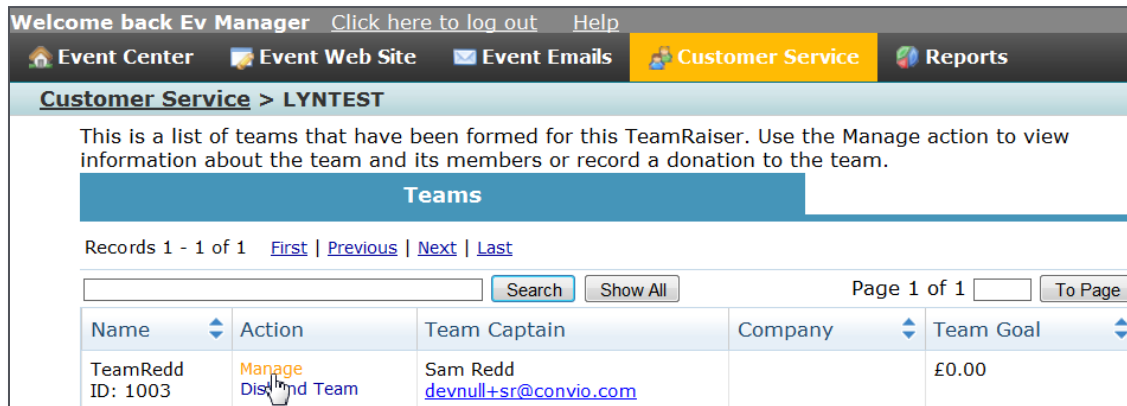
4. From the **Related Actions**, click **Record Team Donation**.
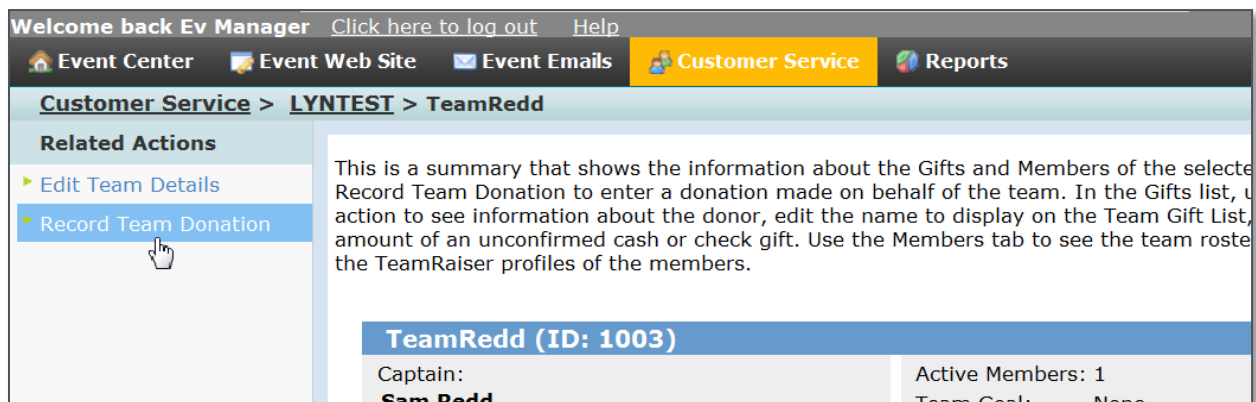
5. On the **Choose Donor** page:

   - Click **New Donor** and enter the donor information and click **Create**.

   - Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.

6. On the **Configure Gift** page, enter and select the appropriate information and click **Process**.

Entering an Offline Donation Received for the TeamRaiser Event

1. After logging into the Event Management Center, click the **Customer Service** tab from the options along the top.

2. From the **Related Actions**, click **Record Event Gifts**.
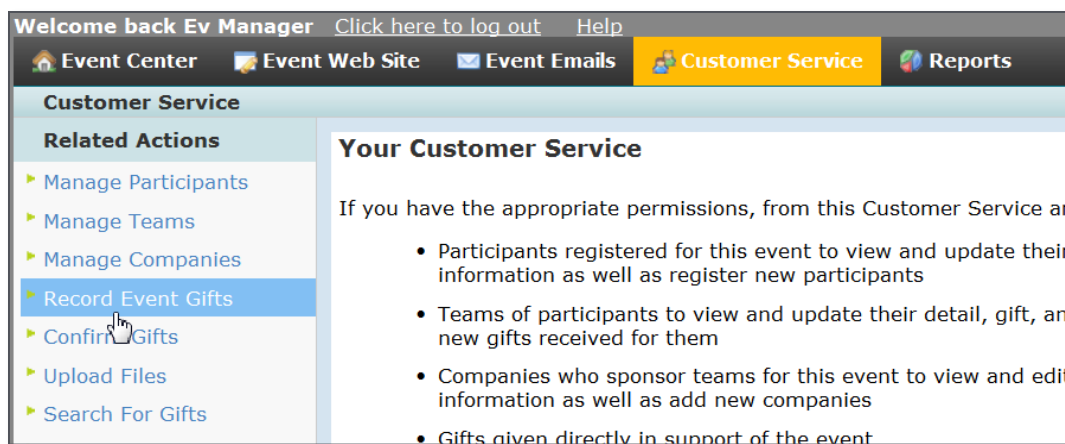
3. On the **Choose Donor** page:

   - Click **New Donor** and enter the donor information and click **Create**.

   - Or, if the donor is already in the system, click **Search for Existing Donor**, enter search criteria, click **Search**, and click **Select** from the **Actions** column of the appropriate donor in the search results.

4. On the **Configure Gift** page, enter and select the appropriate information and click **Process**.

Entering an Offline Gift in the Participant Center

When allowed, participants who receive cash and cheques directly from donors can record them as Unconfirmed Gifts in their Participant Center.

1. After logging into their Participant Center, participant can click **Enter New Gift** on their **Home** page. (or, on their **Progress** page).

2. Complete the information and click **Add**.

Viewing Gift Aid Amounts on TeamRaiser Status Indicators

Gift Aid amounts will display on the:

- **Campaign Progress** status indicator, which often displays on the Greeting page for the TeamRaiser event.

- Team Status Indicator on the Team Page

Reporting Considerations

In Report Writer, the **Gift Aid Status** checkbox has been added to several sections that can be configured in reports, including in the:

- **Declined Transaction** section

- **Deleted Transaction** section

- **Pending Transaction** section

- **Refund Transaction** section

- **Valued Transaction** section

Reports containing these sections include

- Interactions > Interaction Details includes all 5 sections

- Transactions > Transactions Details includes Valued Transaction section

- TeamRaiser > Gift Details includes the Valued Transaction section

ADDITIONAL RESOURCES

We understand that our solutions are an integral part of your organization's success, and so we offers several ways for you to get the help and information you need:

Summer 2012 Release – The community is a one-stop-shop containing everything you need to know about the release, including an overview of all the new functionality, summaries of other features, and links to release-specific training and help resources.

Support – Our Client Care team strives to provide you with the best possible support experience by promptly responding to questions and resolving issues submitted via the method that's most convenient for you. In addition to contacting us via a case or phone, you also have the option to chat with us live to get a quick answer for your quick questions.

Training – We offer a diverse set of training options to meet a variety of roles, learning styles, and situations. Track your learning path and history, view upcoming classes, download documentation and best practices, and browse other resources – via a web browser, at no extra charge, no matter where you are.

Release Calendar – For Luminate Online products, review our Release Planning Calendar to determine when this update will be available to you. For Luminate CRM, please contact your Account Representative.

GIVE US YOUR FEEDBACK

Have a suggestion for a future release? "Ideas" is a tool used by our Product Management team to determine which enhancements are most popular among our clients. You can help shape the future of our roadmap by entering a nominee and voting for ideas submitted by other clients. To participate, visit the Customer Center and click "Support". Once you are in the Support portal, click the "Ideas" tab to begin using the feedback tool.