



Feature Summary: Recurring Giving Enhancements

Module: Donations 2.0

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Contents

New Terms or Concepts.....	2
Overview	4
Key Features & Benefits	4
Use Scenarios	5
Considerations for Clients	5
Limitations and Out of Scope Features	5
Configuration and Use of This Feature.....	6
Changes to Constituent360	6
Changes to Administrative Management	13
To query on recurring gift activity.....	15
To report on recurring gift performance.....	15
To enable the new Gift Service Center.....	17
To enable constituents to change their next payment date online	19

New Terms or Concepts

The new terms and concepts include:

- [Recurring Giving](#)
- [Gift Service Center](#)
- [Enhanced Recurring Gift Status Types](#)
- [New Constituent360 Statuses based on Recurring Gift Status](#)
- [New Recurring Gift Interaction Types++](#)

Recurring Giving

Convio previously used the terms “recurring giving” and “sustained giving” interchangeably to describe these features and giving programs. Going forward we will be standardizing this feature with the term, recurring giving. You will still see “sustained giving” in the product; we will be replacing this over time.

There are three kinds of gifts that a constituent can make that will use recurring transaction functionality for processing:

- **Monthly/Quarterly/Annual gift with no termination date:** In this case, the constituent typically agrees to a monthly gift of a specified amount (for example, \$10/month).
- **Monthly/Quarterly/Annual gift with a specified payment term:** In this case, the constituent might be presented with an option and choose to limit their gift to only 12 months or 24 months (for example, \$10/month for a period of one year).
- **Installment Gift:** In this case, the constituent makes a pledge to give a specified total amount, but chooses to pay that over a series of installments. For instance, they make a \$1,000 gift, but choose to pay for it in 4 quarterly installments.

Gift Service Center

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. A constituent must log in to access the Gift Service Center.

Enhanced Recurring Gift Status Types

New donation statuses have been added to the existing ones to better track donors whose credit cards are failing or whose gifts have been cancelled (due to failure or user request). These fields are displayed in the **Transactions** tab in **Constituent360**.

- **Active** – The last attempt to process the gift was successful and the next payment is due after today’s date.
- **Complete** – The last attempt to process the gift was successful and the final gift payment has been made.
- **User Cancelled** – The donor cancelled the gift through the online Gift Service Center
- **Admin Cancelled (Card Failure)** – The administrator cancelled the gift through the admin interface, and chose the “Stored card is no longer valid” reason
- **Administrator Cancelled (other reason)** - The administrator cancelled the gift through the admin interface and chose “other” as the cancellation reason
- **Card Expired** – The card has expired and the SDP to retry “past expiration date” is not set
- **Cancelled (excessive failures)** – The gift was automatically cancelled because the maximum consecutive failure number (set via an SDP) was reached

- **Delayed** – This status is for **TeamRaiser** only and applies to pledges that will be fulfilled at a later date.
- **Postponed** – One or more payments will be skipped
- **Lapsed** – A gift that is failing, but processing is still being attempted

New Constituent360 Status based on Recurring Gift Status

The constituent status on the **Profile** tab, under **Sustaining Gifts** includes the following:

- **Currently a sustaining donor** – If the recurring gift status is Active
- **A completed sustaining donor** – If the recurring gift status is Complete
- **Terminated by user** – If the recurring gift was cancelled by the user
- **Terminated by admin** – If the administrator cancelled the recurring gift for any reason
- **Terminated due to payment failures** – The recurring gift was cancelled due to excessive failures or an expired credit card
- **Postponed** – The user has chosen to delay a payment until a later date
- **Lapsed sustaining donor** – If the recurring gift status is lapsed (failing, but processing is still being attempted)
- **Partially Lapsed** - The donor has at least one active gift and at least one lapsed gift
- **Unknown** – There is no recurring gift on file for this constituent

New Recurring Gift Interaction Types

The following interactions are recorded when a donor or administrator edits a recurring gift.:

- **Sustaining Gift Amount Changed** – The donor or administrator changed the amount of the gift.
- **Sustaining Gift Date Skipped** - The donor or administrator skipped a month.
- **Sustaining Gift Date Changed** – The donor or administrator changed the monthly payment date
- **Sustaining Gift Duration Changed** - The administrator changed the duration of the gift from “forever” to a specific number of month or vice versa. The interaction is also logged when changing from a specific number of months to different number of months.
- **Sustaining Gift Payment Failed** - Logged when all attempts to process payment in a given payment interval (month/quarter/year) have failed. This is different from the **Sustaining Gift Unsuccessful Attempt** interaction as explained below.
- **Sustaining Gift Unsuccessful Attempt** – An unsuccessful attempt was made to process a payment, but the payment will be retried for the given interval. You can configure the number of attempts to be made before the payment attempt fails. In such a case, an interaction for “Sustaining Gift Payment Failed” is logged.

Overview

This suite of enhancements is focused on helping organizations drive more ROI from their recurring giving programs. The feature enhancements are aimed at four key areas:

- Improving the user experience of the self-service gift management functionality available to constituents
- Improving the user experience of the gift management functionality available to administrators
- Increasing the analytics and segmentation capabilities available through reports and queries so that clients can access the business intelligence needed to raise more from their recurring giving programs
- Improving support for multi-channel recurring giving engagement and management

Key Features & Benefits

Constituent self-service gift management

- Full redesign of the constituent-facing Gift Service Center, plus new APIs for Gift Service Center management
- Ability to change the day of the month on which the gift is processed
- Ability to skip more than one month

Admin Management

- Better visibility into recurring gift plans from the constituent profile
- More details visible in gift management
- Ability to change the day of the month on which the gift is processed and skip more than one month at a time
- Visibility into reasons for failure
- New **Sustaining Gift Performance Summary** report and more recurring giving data available
- Ability to reassign gift plan to a different constituent record
- Better integration with Common Ground Enterprise (these features will be detailed in a separate Feature Summary Doc in July)

New Interactions and Status types

- Interactions logged on the constituent profile for any changes made to the gift by the administrator or constituent
- Additional status types to better track donors whose credit cards are failing or whose gifts have been cancelled due to failure or upon user request
- Track source codes for all new interaction types

Benefits

- Easier ability to identify and reengage lapsed recurring donors
- More efficient admin management
- Greater ROI from recurring giving programs
- Better constituent gift management experience, leading to more upgrades
- Support for unique forms for upgrade campaigns via gift center APIs

Use Scenarios

More options for users to update their billing information online

The American Health Society would like to give recurring donors the ability to change the day of the month on which their gift is processed online. Since donors can perform these tasks without contacting AHS, AHS is able to decrease the administrative resources needed to perform these tasks.

Enhanced recurring gift reporting

The American Health Society closely tracks recurring donation performance to be able to detect trends and adjust their marketing strategy accordingly. The new **Sustaining Gift Performance Summary** report now tracks data to measure:

- How many new sustainers (and associated revenue) did we acquire this week/month/year?
- How many total sustainers (and associated revenue) did we have this week/month/year?
- How many sustainers were canceled (and associated revenue) this week/month/year (by reason)?
- How many sustainers upgraded or downgraded their gift (and associated revenue) this week/month/year?
- How many recurring transactions failed (and associated revenue) this week/month/year?

Enhanced recurring gift querying

AHS also adjusts their marketing strategy based on recurring gift activity. They use the new sustaining gift interactions which include:

- Sustaining Gift Amount Changed
- Sustaining Gift Date Changed
- Sustaining Gift Duration Changed
- Sustaining Gift Unsuccessful Attempt

AHS uses the results of their queries to create email groups for targeted email campaigns.

Considerations for Clients

The new Gift Service Center must be enabled by a Convio admin. The new constituent profile Sustaining Giving Information fields will be enabled automatically for clients who are already displaying the Sustaining Giving Status on the Constituent Profile page. Please consult with your Account Manager or Client Care to request these features to be enabled.

Limitations and Out of Scope Features

The new Sustaining Gift Performance Report and new Sustainer Giving Interactions (list) will not contain historical data at the time of the release. All interactions will be tracked moving forward

Configuration and Use of This Feature

This section contains the following:

- [Changes to Constituent360](#)
- [Changes to administrative management](#)
- [To query on recurring gift activity](#)
- [To report on recurring gift performance](#)
- [To enable the new Gift Service Center](#)
- [To enable constituents to change their monthly payment date online](#)

Changes to Constituent360

To support the recurring giving enhancements, new options have been added to both the Profile tab, the Transactions tab and the Interactions tab in **Constituent360**.

- [The Profile tab](#)
- [The Interactions tab](#)
- [The Transactions tab](#)

The Profile Tab

New field have been added to the **Sustained Giving Information** on the **Profile** tab in **Constituent360**.

- **Last Payment Attempt Failure Code** - The name of the payment gateway used and the error code generated by the payment gateway when the last unsuccessful attempt to process a gift was made
- **Intervals Since Last Successful Payment** - The number of intervals since a gift was successfully processed. These are payment *intervals* (for example, months/quarters/years) and not payment *attempts*.
- **Gift Plans Eligible for Processing** - The total number of gifts that you are still attempting to process, regardless of their status (Active, Lapsed, and Postponed)

Note: See the table below for details.

Sustained Giving Information		
Status:	Terminated Due To Payment Failures	Monthly Amount: \$60.00
Start Date:	Jun 16, 2011	Planned End Date: Nov 16, 2011
Actual End Date:	Jun 16, 2011	Card Expiration Date: Oct 31, 2013
Last Payment Attempt Failure Code:	(Internal Test Gateway): The credit card was declined. Please check the information that you entered.	Intervals Since Last Successful Payment: 1
Gift Plans Eligible For Processing:	0	

The way the fields are calculated differs depending on the number of recurring gifts and whether there are any eligible gifts. Eligible gifts are gifts that you are still attempting to process regardless of their status: Active, Lapsed, or Postponed. This section contains the following tables:

- How the sustaining gift fields are calculated
- How the sustaining gift status on the Constituent360 Profile tab is determined for one gift
- How the sustaining gift status on the Constituent360 Profile tab is determined for multiple gifts

How the Sustaining Gifts fields are calculated

FIELD	DEFINITION	HOW IT IS CALCULATED IF THERE IS MORE THAN ONE GIFT	HOW IT IS CALCULATED IF THERE ARE ZERO ELIGIBLE GIFTS
Status	The status of the constituent. <i>Note: This status is based on the gift status on the Transaction tab, but is a little different. This is the status of the constituent and not of the individual gift.</i>	See the following table for details.	Complete
Monthly Amount	The amount pledged per month.	The sum of all eligible gift monthly payments.	The highest single, previous monthly amount
Start Date	The date that the first payment is made	The earliest start date among eligible gifts	The earliest start date among the completed gifts
Planned End Date	The date the donor specifies as the end date when they make the gift	The most recent end date among eligible gifts	The most recent end date among the completed gifts
Actual End Date	If the donor cancels or changes their gift, this date may differ from the Planned End Date	The most recent actual end date among eligible gifts	The most recent actual end date among the completed gifts
Card Expiration Date	The date the donor's credit card expires	The earliest expiration date among eligible gifts	The earliest expiration date among the completed gifts
Last Payment Attempt Failure Code	<i>Note: This is only populated when the constituent has 1 or more gifts that are failing.</i>	The name of the payment gateway used and the error code generated by the payment gateway when the last unsuccessful attempt to process a gift was made	The name of the payment gateway used and the error code generated by the payment gateway when the last unsuccessful attempt to process a gift was made. This code remains until the constituent makes a new gift.

How the Sustaining Gifts fields are calculated (Cont'd.)

FIELD	DEFINITION	HOW IT IS CALCULATED IF THERE IS MORE THAN ONE GIFT	HOW IT IS CALCULATED IF THERE ARE ZERO ELIGIBLE GIFTS
Intervals Since Last Successful Payment	Note: <i>This is only populated when the constituent has 1 or more gifts that are failing.</i>	The number of intervals since a gift was successfully processed. These are payment <i>intervals</i> (for example, months/quarters/years) and not payment <i>attempts</i> . So, if the SDP for retrying failed payments is enabled, this count would only be recorded when all attempts in a given payment period (for example, month/quarter/year) have been unsuccessful.	The number of intervals since a gift was successfully processed. These are payment <i>intervals</i> (for example, months/quarters/years) and not payment <i>attempts</i> . So, if the SDP for retrying failed payments is enabled, this count would only be recorded when all attempts in a given payment period (for example, month/quarter/year) have been unsuccessful.
Gift Plans Eligible for Processing	The total number of gifts that you are still attempting to process, regardless of their status (Active, Lapsed, and Postponed)	Note: <i>These are calculated regardless of the number of recurring gifts.</i>	The status would be 0 (zero).

How the sustaining gift status on the Constituent360 Profile tab is determined

The way that the constituent status on the profile page is determined varies depending on whether there is zero, 1, or multiple recurring donations. See the tables below for details.

If the constituent has only one recurring gift, then the constituent status is as follows:

If the Gift Is	Then the Status On the Profile Page Is
Active	Currently a sustaining donor
Complete	A completed sustaining donor
User Cancelled	Terminated by user
Admin Cancelled (Card Failure)	Terminated by admin
Admin Cancelled (Other)	Terminated by admin
Card expired (no retries)	Terminated due to payment failures
Cancelled (Excessive Failures)	Terminated due to payment failures
Delayed (this status only applies to TeamRaiser)	Unknown
Postponed	Postponed
Lapsed (Failing, but processing is still being attempted)	Lapsed sustaining donor
There is no recurring gift on file for this constituent	Unknown

If the constituent has multiple recurring gifts, then the constituent status is as shown in the following table:

Note: An **ineligible gift** is one that the system will no longer attempt to process; a gift that is any status except Active, Postponed, or Lapsed.

If the first gift is	And the second gift is	Then the status on the Profile tab is
Active	Ineligible	Current
Active	Postponed	Current
Active	Lapsed	Partially Lapsed
Postponed	Lapsed	Postponed
Postponed	Ineligible	Postponed
Lapsed	Ineligible	Lapsed
Ineligible	Ineligible	<p>The status is decided according to the rules for a single gift (see the previous table). And it will be the status of the gift with the most recent successful payment.</p> <p>For example, if the first gift was completed on June 1, and the second gift was cancelled by the user after a payment on June 9, then the status is “User Cancelled” (since that gift had the most recent successful payment).</p>

The Interactions Tab

On the **Interactions** tab, new interactions have been added to better track changes made to the recurring gift plan or activities that occur on the gift.

The screenshot shows a web interface for the 'Interactions' tab. At the top, there is a header bar with the text 'Select the Interaction Types to display for this constituent.' followed by two links: 'Emails sent' and 'Enter a new interaction'. Below this is a large list box containing the following interaction types: 'Sustaining Gift Amount Changed', 'Sustaining Gift Cancelled', 'Sustaining Gift Changed Billing Information', 'Sustaining Gift Date Changed', 'Sustaining Gift Duration Changed', 'Sustaining Gift Payment Failed', 'Sustaining Gift Payment Failed (API)', and 'Sustaining Gift Payment Skipped'. Below the list box are two buttons: 'Filter' and 'Show All'. At the bottom right of the interface, there is a dropdown menu labeled 'All My Categories' and a 'Go' button.

These interactions are logged whether the change was made by a donor or an administrator. The new interactions include:



- **Sustaining Gift Amount Changed** – The donor or administrator changed the amount of the gift.
- **Sustaining Gift Date Skipped** - The donor or administrator skipped a month.
- **Sustaining Gift Date Changed** – The donor or administrator changed the monthly payment date
- **Sustaining Gift Duration Changed** - The administrator changed the duration of the gift from “forever” to a specific number of month or vice versa. The interaction is also logged when changing from a specific number of months to different number of months.
- **Sustaining Gift Payment Failed** - Logged when all attempts to process payment in a given payment interval (month/quarter/year) have failed. This is different from the **Sustaining Gift Unsuccessful Attempt** interaction as explained below.
- **Sustaining Gift Unsuccessful Attempt** – An unsuccessful attempt was made to process a payment, but the payment will be retried for the given interval. You can configure the number of attempts to be made before the payment attempt fails. In such a case, an interaction for “Sustaining Gift Payment Failed” is logged.

The Transactions Tab

A sustaining gifts section has been added to the Transactions tab. This section will include any recurring gifts that the constituent has created, regardless of the current gift status. For a list of all the Status types, see **Enhanced Recurring Gift Status Types** in **New Terms and Concepts** at the beginning of this document. Links to edit the gift and change the donor have been added to recurring gifts that appear in the transaction history list.

Sustaining Gifts

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

Donation Campaign	Actions	Status	Amount	Account Information
Sustainer Donation Form	 	Active	\$50.00	*****1111 12/2011

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

Transaction Summary

Total Transactions Lifetime: \$50.00
 Total Transactions YTD: \$50.00
 Outstanding Balance: \$0.00

	Donation Form/Event	Date	Paid
First Transaction	Service Center Online Donation Campaign	5/18/11	\$50.00
Last Transaction	Service Center Online Donation Campaign	5/18/11	\$50.00
Largest Transaction	Service Center Online Donation Campaign	5/18/11	\$50.00

Transaction History

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

Billing Info	Fundraiser/Event	Date	Type	Amount	Security Category	Confirmation Code	Source	Actions
ConsField, SustBasic msimpson@sustbasicconsfield@convio.com	Service Center Online Donation Campaign Form: Sustainer Donation Form	05/18/2011 03:55 AM	Recurring gift	\$50.00	General	106-1001-3-1002-1002		Edit Recurring Gift Refund Change Donor Add Soft Credit Add Fund Soft Credit

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

Changes to Administrative Management

The **Sustaining Gifts** tab in **Donation Management** now includes:

- [More search options](#)
- [More editing Options](#)

More Search Options on the Sustaining Gifts tab

The **Sustaining Gifts** tab in **Donation Management (Fundraising > Donation Management)** now enables you to search on donors by their account status: **Active**, **Postponed**, and **Lapsed**. It also enables you to search on sustaining gifts that have been failing on or before a specific date.

If a client has fewer than 2000 eligible recurring gifts, all gifts will display on initial load of this page, without the need to search for specific gifts. If the client has more than 2000 eligible recurring gifts, use the search box to find a specific gift.

The following screenshots show the redesigned search page with two new options: **Gift Status** and **Find Failing Sustaining Gifts**. In the Gift Status field, you can search on gifts that are **Active**, **Postponed**, or **Lapsed**.

Donation Management

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

Sustaining Gift List

Search for all sustaining gifts using one or more search fields below. From here, you can review sustaining gifts, cancel them, skip a payment, change the payment date or modify the billing information associated with the gift.





Search sustaining gifts matching this criteria.

First Name:
Last Name:
Email:
Constituent ID:
Gift Status: --No Selection--

Find failing sustaining gifts.
Last successful payment fell on or before:
Search

Sustaining Gifts
Records 1 - 9 of 9
[First](#) | [Previous](#) | [Next](#) | [Last](#)

Page 1 of 1

Name	Donation Form	Action	Amount	Period	End Date	Last Payment Date
COM_CGE, BasicClassic	COM_CGE Donation Classic Sustaining	 	\$55.00	Monthly	No End Date	Jun 15, 2011
COM_CGE,	COM_CGE_Online_Campaign - COM_CGE	 	\$83.33	Monthly	May 15, 2012	Jun 15, 2011

More Edit Options on the Sustaining Gifts tab

When you edit a donor's account from the **Sustaining Gifts** tab in **Donation Management**, you can now open the constituent's profile and modify the gift date. When you modify the monthly gift payment date, only future dates can be selected and the change is effective immediately.

Sustaining Gift Details	
Contact Information	
Name:	ConsField, ACHMonGiveBasic
Email Address:	msimpson+achmonbasconsfield@convio.com
Phone:	
Gift Information	
Donation Form:	Service Center Online Donation Campaign - Monthly Giving Donation Form
Gift Status:	Active
Selected Gift Amount:	\$25.00
Total Amount Processed:	\$25.00
Frequency:	Monthly
Start Date:	Jun 22, 2011
End Date:	No End Date
Next Payment Date:	Jul 22, 2011
View Constituent Profile	
Modify Gift Amount	
Modify Gift Duration	
Modify Gift Date	
<input type="button" value="Skip Next Payment"/>	
Billing Information	
Bank Account	
Routing: 111000025	
Account: *****1234	
Type: CHECKING	
Name	
ACHMonGiveBasic ConsField	
Address	
1225 Maple Street	
Austin, TX 78702	
United States	
<input type="button" value="Enter New Credit Card"/> <input type="button" value="Enter New Bank Account"/>	
Payment Information	
Number of Expected Payments: Ongoing	
Number of Successful Payments: 1	
Number of Failed Payments: 0	
Date	Result
Jun 22, 2011 12:18:39 PM	Successful
Cancellation Information	
Sustaining Gift Details <input type="radio"/> User requested cancellation	
<input type="radio"/> Stored card is no longer valid	
<input type="radio"/> Other	
Additional Comments: <input type="text"/>	

To query on recurring gift activity

In addition to the new **Sustaining Gift Performance Summary** report, AHS uses the new recurring giving interactions available in the Query Builder in order to further hone their marketing strategy. For a list of the new sustaining gift interactions, see **New Terms and Concepts** at the beginning of this document.

When you click the **Interaction Clause** button, the new sustaining gift interactions are available in the **Default Types** group.

Interaction Phrase Type

Include (or exclude) constituents who have specific interactions with your site. If selecting a Referenced Type of interaction, you can also a referenced campaigns or other objects to your phrase. (Filter long lists of referenced objects by Name and/or Security Category.) ([Read More](#))

Include contacts that

Interaction Group	Interaction Type
Referenced Types	Sustaining Gift Amount Changed
Default Types	Sustaining Gift Billing Changed
Custom Types	Sustaining Gift Cancelled
	Sustaining Gift Date Changed
	Sustaining Gift Duration Changed
	Sustaining Gift Payment Failed
	Sustaining Gift Payment Failed (API)

With subject:

To report on recurring gift performance

With the new **Sustaining Gift Performance Summary** report, AHS can measure how well their fundraising efforts are doing by reporting on:

- How many new sustainers (and associated revenue) did we acquire this week/month/year?
- How many total sustainers (and associated revenue) did we have this week/month/year?
- How many sustainers were canceled (and associated revenue) this week/month/year (by reason)?
- How many sustainers upgraded or downgraded their gift (and associated revenue) this week/month/year?
- How many recurring transactions failed (and associated revenue) this week/month/year?

In this case, AHS decides to see what these numbers are from month to month for the last twelve months.

To run the Sustaining Gift Performance Summary report

1. In **Report Writer**, create a new **Transactions** report.
2. In the list of Available Reports that appears, select the **Sustaining Gift Performance Summary** report.

The screenshot shows the 'Report Writer' interface with the 'Report Results' tab selected. On the left, a sidebar lists steps: 1. Select Report Type, 2. Select Columns, 3. Order and Rename Columns, 4. Select Sort Order, 5. Configure Filters, 6. Identify Report, 7. Review Criteria Summary. The main area is titled '1. Report Selection:' and contains a dropdown menu set to 'Transactions'. Below this, under 'Available Reports:', there are four radio button options: 'Transaction Details', 'Sustaining Gift Attempt Details', 'Sustaining Gift Attempt Summary', and 'Sustaining Gift Performance Summary'. The 'Sustaining Gift Performance Summary' option is selected and circled in red. At the bottom, there are 'Next' and 'Cancel' buttons.

3. On page 2, **Select Columns**, scroll down to the **Sustaining Gift Performance** in and select the following.

The screenshot shows the 'Sustaining Gift Performance' configuration page. It has two main sections: 'Sustaining Gift Performance Facts (Summable)' and 'Sustaining Gift Performance Information'. In the first section, several items are checked: Canceled Amount (\$), Failed Amount (\$), Ongoing Amount (\$), Skipped Amount (\$), Upgraded Amount (\$), Canceled Count, Failed Count, Ongoing Count, Skipped Count, Upgraded Count, Downgraded Amount (\$), First Time Amount (\$), Recaptured Amount (\$), Total Processed Amount (\$), Downgraded Count, First Time Count, Recaptured Count, and Total Processed Count. In the second section, 'Date', 'Date and Time', 'Date of Month', 'Date of Week', 'Error Code', 'New Gift Amount (\$)', 'New Next Payment Date', 'Old Recurring Pledge Status', 'Quarter of Year', 'Source Code', and 'Year' are checked. The 'Month Number' option is also checked and highlighted with an orange background.

4. Complete the remaining process steps and run the report. The report will look something like this:

Report Results Report Configuration																				
Sustaining_Gift_Performance_By_Month																				
Year	Month Number	Total Processed Amount (\$)	Total Processed Count	Failed Amount (\$)	Failed Count	Skipped Amount (\$)	Skipped Count	Recaptured Amount (\$)	Recaptured Count	First Time Amount (\$)	First Time Count	Ongoing Amount (\$)	Ongoing Count	Canceled Amount (\$)	Canceled Count	Upgraded Amount (\$)	Upgraded Count	Downgraded Amount (\$)	Downgraded Count	
2010	06	431.70	7	0.00	0	0.00	0	0.00	0	431.70	7	0.00	0	0.00	0	0.00	0	0.00	0	
2010	07	446.66	7	0.00	0	0.00	0	0.00	0	0.00	0	446.66	7	0.00	0	15.00	1	0.00	0	
2010	08	321.66	5	0.00	0	100.00	2	0.00	0	0.00	0	321.66	5	0.00	0	0.00	0	25.00	1	
2010	09	125.00	3	251.66	3	45.00	1	100.00	2	0.00	0	125.00	3	0.00	0	0.00	0	0.00	0	
2010	10	336.66	5	0.00	0	25.00	1	296.66	4	0.00	0	336.66	5	0.00	0	0.00	0	0.00	0	
2010	11	306.66	4	40.00	1	50.00	1	25.00	1	50.00	1	256.66	3	0.00	0	20.00	1	0.00	0	
2010	12	270.00	6	0.00	0	166.66	1	90.00	2	40.00	1	230.00	5	0.00	0	0.00	0	0.00	0	
2011	01	296.66	4	75.00	2	65.00	1	166.66	1	0.00	0	296.66	4	0.00	0	0.00	0	0.00	0	
2011	02	270.00	6	0.00	0	0.00	0	140.00	3	0.00	0	270.00	6	0.00	0	0.00	0	0.00	0	
2011	03	253.37	5	0.00	0	0.00	0	0.00	0	83.37	1	170.00	4	50.00	1	0.00	0	0.00	0	
2011	04	158.33	3	0.00	0	40.00	1	0.00	0	0.00	0	158.33	3	0.00	0	0.00	0	15.00	1	
2011	05	123.33	2	75.00	2	0.00	0	40.00	1	0.00	0	123.33	2	0.00	0	0.00	0	0.00	0	
2011	06	90.00	2	25.00	1	0.00	0	50.00	1	0.00	0	90.00	2	25.00	1	0.00	0	0.00	0	

To enable the new Gift Service Center

Enabling the new Gift Service Center updates the look and feel of the Service Center that the **donor** sees. The design of the old and new service center screens are compared below.

- Old Service Center Gift Detail Page
- New Service Center Gift Detail Page
- Old Service Center Gift List Page
- New Service Center Gift List Page

Note: Contact Convio Client Care to enable the new Service Center.

The Old Service Center Gift Detail Page

Personal Profile Special Interests 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.
Campaign Details
Donation Campaign: Service Center Online Donation Campaign
Donation Form: Sustainer Donation Form
Donation Level: Bronze
Gift Payment Date Information
First Gift Payment: Jun 21, 2011
Most Recent Payment: Jun 21, 2011
Next Payment: Jul 21, 2011
Skip Next Payment Discontinue Gift Payments Modify Gift Date
Payment Amount
\$35.00
Modify Gift Amount
Payment Interval
Monthly
Payment Method
Credit Card Number: *****1111
Credit Card Exp. Date: 06/2011
Change billing to a new credit card Change billing to a new bank account
Privacy Policy Site Map Contact Us Home
Printer Friendly Version

The Redesigned Service Center Gift Detail Page

[Personal Profile](#) | [Special Interests](#) | **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.

AHS Donation Form

Active

Gift Processing

Payment [edit] Amount: 5.00 USD / Month Next Payment: 07/15/2011 Skip Next Payment Previous Payment: 06/15/2011 View Payment History Discontinue Payments	Payment Method [edit] Credit Card *****1111 Exp: 06/2011 User One Billing Address Main St. Emeryville, CA 94901 United States
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The Old Service Center with More Than One Recurring Gift

Note: This page only displays when the constituent has more than one recurring gift on their profile. If they have only one gift, the Gift Detail page (shown above) displays instead.

[Personal Profile](#) | [Special Interests](#) | **Service Center**

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Donation Campaign	Actions	Status	Amount	Account Information
Sustainer Donation Form	View	Active	\$120.00	*****1111 06/2011
Sustainer Donation Form	View	Active	\$35.00	*****1111 06/2011

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)
[Privacy Policy](#) | [Site Map](#) | [Contact Us](#) | [Home](#)
[Printer Friendly Version](#)

The Redesigned Service Center Gift List Page

Note: This page only displays when the constituent has more than one recurring gift on their profile. If they have only one gift, the Gift Detail page (shown above) displays instead.

Personal Profile	Special Interests	Service Center
----------------------------------	-----------------------------------	-----------------------

Service Center

Recurring Giving

Sustainer Donation Form [[view details](#)]
Active
Amount: **60.00** USD / Month
Next Payment: July 21, 2011
Previous Payment: June 21, 2011
[View Payment History](#)
CC Number: *****1111
CC Exp Date: 06 / 2011

Sustainer Donation Form [[view details](#)]
Active
Amount: **5.00** USD / Month
Next Payment: July 21, 2011
Previous Payment: June 21, 2011
[View Payment History](#)
CC Number: *****1111
CC Exp Date: 06 / 2011

Once you have enabled the new Gift Service Center, many of the labels can now be customized for your site via the Message Catalog. Changes to the branding of the Gift Service Center can also be made via CSS.

To enable constituents to change their next payment date online

Constituents can now update their next payment date online (and the day of the month on which all future gifts are processed). This option is configured in two different places: one for recurring gifts that originated on a **Donations Classic** form and one for gifts that originated on a standard Donations 2.0 form.

- [What the donor sees when this option is enabled](#)
- [To enable the new billing option for recurring gifts that were originally made via a Donations Classic form](#)
- [To enable the new billing option for recurring gifts that were originally made via an Online Giving form](#)

What the donor sees when this option is enabled

When this option is enabled, donors can change their monthly payment date in the online service center. If the redesigned service center is enabled, this is what the donor sees:

Donor clicks this link

[Personal Profile](#) | [Special Interests](#) | **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.

AHS Donation Form

Active

Gift Processing

Payment [edit]	Payment Method [edit]
Amount: 5.00 USD / Month	Credit Card *****1111
Next Payment: 07/15/2011	Exp: 06/2011
Skip Next Payment	
Previous Payment: 06/15/2011	User One
View Payment History	Billing Address Main St. Emeryville, CA 94901 United States
Discontinue Payments	

To edit the following options


[Personal Profile](#) | [Special Interests](#) | **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.

AHS Donation Form

Active

Gift Processing

Payment  Indicates Required	Payment Method
Amount: 5.00 USD / Month	Credit Card *****1111
Next Payment: ? 07/15/2011	Exp: 06/2011
Save Changes Cancel	User One
Skip Next Payment	Billing Address Main St. Emeryville, CA 94901 United States
Previous Payment: 06/15/2011	
View Payment History	
Discontinue Payments	

[Cancel](#)

To enable the new billing option for recurring gifts that were originally made via a Donations Classic form

Note: The process pages available in the **Service Center** vary depending on whether or not the new Gift Service Center is enabled. Contact Convio to enable this feature.

1. Click **Donations > Service Center**. The **Sustainer Service Center** page displays.
2. Click the process page titled, **Donations Classic Configuration**. If the new Gift Service Center is enabled, this is step 2; if the new Gift Service Center is not enabled, this is step 8.
3. Select the “**Yes, allow donors to change the date of their next gift payment**” option in step two, **Gift Payment Modification Options**.

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

Service Center Online Donation Campaign > Installment 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 gift. This content is configured globally for the Gift Service Center, which may be useful if you want to refer specifically to the purpose of the gift.

[Use Plain Text Editor](#) [Help](#)

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.

Path: p

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 gifts. Donors who access the Gift Service Center to see their gift information but will not be able to make any modifications to the gift.

New Option

- ☒ 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

To enable the new billing option for recurring gifts that were originally made via an Online Giving form

1. Click **Fundraising > Donation Management**. The **Online Giving Campaigns** page displays.
2. Click the **All Donation Forms** tab. The **All Donation Forms** page displays.
3. Create a new campaign if you don't have one.

4. Create a new form or edit an existing. The process pages for editing a form display.
5. In the third process page, **Design Donor Screens**, click **Configure Service Center**.

Donation Management

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

Campaigns > American Health Society Campaign > American Health Society 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**

This is a list of the end-user pages associated with your form. If you plan to use the optional Splash Page to provide information, it 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 to modify the form content.

Name	Actions	Status	Date Last Modified	Description
Splash Page	Edit Publish	✗ Not using this page		An optional page that can be used to provide information to donors.
Donation Form	Preview Edit	— Using default content		The main page where donors can make a donation.
Thank You Page	Preview Edit	— Using default content		The page displayed after a donor completes a donation.
Transaction in Progress Page	Preview Edit	— Using default content		A warning page that appears while a donation is being processed.

Next or Cancel

The **Configure Service Center** page displays.

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

Service Center Online Donation Campaign > Installment 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 donation. This content is configured globally for the Gift Service Center, which may be useful if you want to refer specifically to the purpose of the campaign.

Use Plain Text Editor Help

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.

Path: p

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 donations. Donors will not be able to make any modifications to the donation if no options are selected.

- ☒ 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
- ☒ **New Option** Yes, allow donors to modify the date of their next gift payment

6. Select last option, **“Yes, allow donors to modify the date of their next gift payment”**, along with any other options you need on your form. Convio recommends that you select all the options.
7. Click **Finish** to save your changes. The **Donation Management** process pages display.
8. Make any other necessary changes and publish the form.