

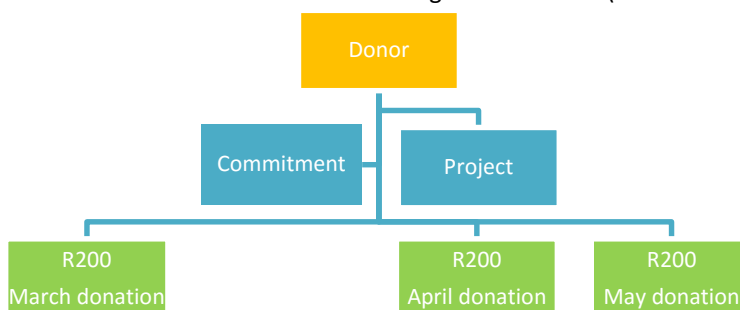
Donation commitment

OVERVIEW

Commitments, promises of future income are created in Devman once-off, either manually or imported from a spreadsheet.

For each commitment you are able to:

- Set the start date, frequency, duration (or open-ended) and the amount
- Alter the details as donor's require – to meet new requirements
- Renew commitments when completed
- Generate donations automatically when integrated with online giving
- Generate donations in bulk for eft / in-kind donations (i.e. no need to enter these manually one by one)
- Generate automatic communications or reminders on a given milestone (1st donation or 5nd donation)



Transaction channels

When donations are made through an online payment system or by other conventional means (eg debit orders). Depending on your set up, you could have a number of transaction channels, such as:

Standard

- The commitment was set up directly on DevMan.
- As donations are received, the donation record is manually added to the commitment on DevMan.
- Donation transaction records can be amended.
- Commitment details are fully managed within DevMan.

VCS Credit Card

- Donors set up the commitment themselves through your online donation page, the commitment is automatically added to DevMan.
- Or the user added the commitment and bank details directly to DevMan
- VCS securely processes each donation when due (at set interval), feeding directly into DevMan. (See Online Giving Gateway Info document)
- Donation details cannot be changed once added.
- Commitment details (bank account, donation interval, amount changes etc.) can be managed by the DevMan user – any changes are automatically updated between VCS and DevMan.

Other - GivenGain / Paygate / Bureau

- The commitment was made by the donor via a payment portal and imported into DevMan.
- Donations are processed by the payment portal and then manually imported into DevMan at regular intervals
- Donation transaction records cannot be changed once added.
- Commitment details (bank account, donation interval, amount changes etc.) can only be managed by the payment portal – any changes made on DevMan are not integrated to payment portal.

Commitment example

Paid from	<i>Donor Name</i>						
Paid to	<i>Project where funds will be used</i>						
Instalment details	Transaction channel	Credit card - VCS					
	Start date	26/03/2014					
	End date	26/03/2015					
	Next due date	26/05/2014					
	Interval	Monthly					
	Amount per interval	R200.00					
Total donations	Amount to Date						
Status	<table border="1"> <tr> <td>26/04/2014</td> <td>Active - Successful</td> </tr> <tr> <td>26/03/2014</td> <td>Active - Successful</td> </tr> <tr> <td>15/03/2014</td> <td>Captured</td> </tr> </table>	26/04/2014	Active - Successful	26/03/2014	Active - Successful	15/03/2014	Captured
26/04/2014	Active - Successful						
26/03/2014	Active - Successful						
15/03/2014	Captured						
Comments	Internal Memos						

Transaction List Example

Paid from	Project	Date	Amount	Fund raising mechanism
Mpho Kusile	Burns Unit expansion	26 April 2014	200.00	Payroll giving
Mpho Kusile	Burns Unit expansion	26 March 2014	200.00	Payroll giving

Paid from: The donor name
Paid to: The project where fund are allocated

Instalment details:

- Transaction Channel – method through which the donation is received
- Start date – when commitment commences
- End date – expiry date (blank if open ended commitment)
- Next due date – next donation due
- Interval – frequency of donations
- Amount per interval – the amount donation

Total donations: The total donation amount received to date

Status: A milestone is added for donation showing transaction status

- Captured – when the commitment was set up
- Active – the commitment is still active
- Active – Successful – successful donation
- Active – Unsuccessful - unsuccessful donation
- Completed – commitment is terminated

Rules can be setup to trigger workflow reminders and activities, e.g.:

- Send thank you for 1st successful donation
- Send thank you with a reminder to send gift for the 5th successful donation

Transaction list: A summary of all successful donations received to date.

Add commitment

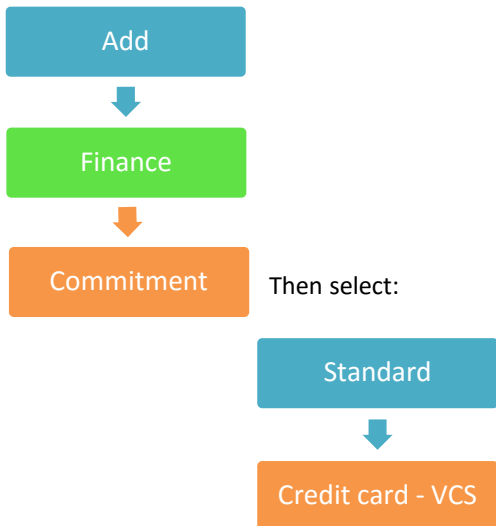
Before adding a commitment please ensure you've captured:

- Donor profile (see Contacts quick guide)
- Donor bank details (required for VCS integration)
- The project (See Projects for IA quick guide)

Commitments are added to DevMan in two ways:

- Manually – for standard and VCS methods
- Auto added – when from integrated portals (VCS, GivenGain, Paygate, Bureau)

Manually adding from the person profile:



(GivenGain / Paygate / Bureau options are added via imports)

Paid from:	Will default to the donor profile
Paid to:	Use inline search to add the project
Parent:	This will auto fill based on the parent organisation of the project
Other flags:	Select the rest of the fields from the drop down options
Instalment details:	
Disable	Leave blank
Interval:	Select commitment frequency
Amount per interval:	The amount per donation
Start date:	When commitment commences
Number of donation / End date:	
Add either the number of donations or the end date	
- if you add the number of donations the end date will auto calculate	
- if you add the end date the number of donations will auto calculate	
- for open ended commitments – DO NOT add a number of donations or an end date	
Next due date:	
For future plans, leave this field blank, the date will auto calculate to the start date	
If the plan is captured after the fact:	
- if left blank, the next due date will auto calculate to the next future due date or start date	
- if manually added the next due date will remain as captured	

Capture the details of the commitment. Save and stay on page.

View commitments

Commitments can be viewed from the finance menu and from the donor profile

From the finance menu select:



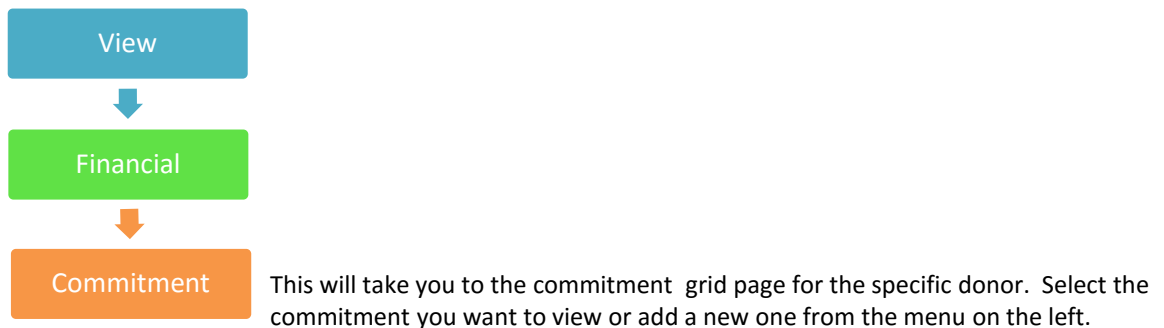
Filter the data using:

- the commitment filter function
- the commitment saved reports (See Advanced reporter saved selections quick guide)
- the commitment grid filters

Select a row on the commitment grid to view the summary of the commitment.

From the donor profile:

A summary of commitments is shown on the donor profile page – click on the grid to view the details of a specific commitment, or select:



Manage commitments

Standard and VCS integrated commitments are managed directly on DevMan

VCS commitment management:

- Update commitment details – amount, interval, duration etc
- Update integrated bank account details
- Failed transactions
- Closed commitments

Data updated on DevMan will automatically feed through to VCS.

Standard commitment management:

- Update commitment details – amount, interval, duration etc
- Add donation records
- Close commitments

Standard commitments – adding donations

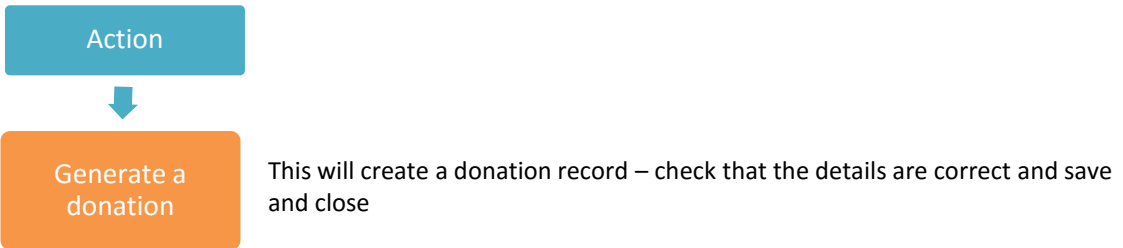
Donations are typically received by EFT, debit orders, cash or in-kind. A record of the donation needs to be added to the commitment manually. There are 2 ways to add a donation to a standard commitment :

- adding a single donation per commitment
- adding donations in bulk to multiple commitments

A few important points:

- the generated donation record will automatically have the date according to the next due date as per the commitment
- the due date may fall on a non-banking day and therefore will need to be updated to the date of the actual transaction, it is possible to bulk update the date on the donation record when generating the donation
- a donation cannot be added if the commitments has reached it's end date
- a donation cannot be generated if a previous captured donation is dated 3 days before or after the current date

TO ADD A SINGLE DONATION to a commitment – view the details of the specific commitment to which you want to add the donation. Then select:



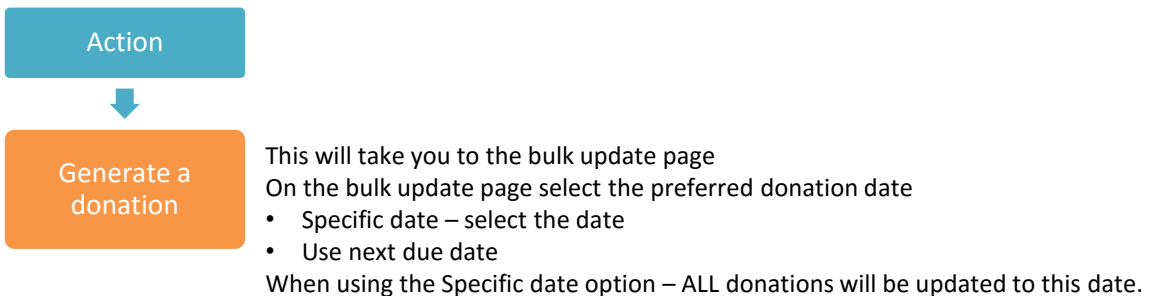
TO BULK GENERATE DONATIONS on multiple commitments view the commitment grid then filter the data by:

- using the commitment search function
- using commitment advanced reporter
- using commitment saved reports
- using the commitment grid filters

Be sure to filter on

- Standard transaction channel
- the applicable next due date range (i.e. for the past month or a specific date)

On the commitment grid page select the check boxes of the commitments to be updated then select:



Then select **Begin process**

This action will:

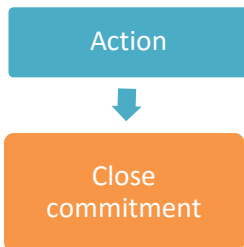
- generate a donation record per commitment
- update the date of the donation record (if selected)
- update the next due date on the commitment

Wait for the process to complete before continuing to work on DevMan.

Close a plan

Plans will automatically close when they reach their end date. Plans can also be closed individually or as a batch before the end date. .

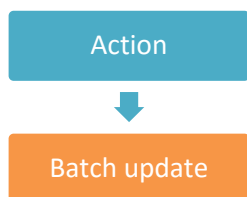
Individually – view the commitment summary then select:



In bulk – view the commitment grid, filter the data using:

- the commitment filter function
- commitment saved reports
- the commitment grid filters

On the commitment grid page select the check boxes of the commitments to be updated then select:



This will take you to the bulk update page.

- Add a description
- Select Action to perform – Workflow
- Select Generate milestone – Closed
- Disable workflow – if disabled any linked workflow rules will not generate

Then select:



This will update the milestones of all selected commitments from Active to Closed. This will also lock the plan and not allow any donations generated. Any workflow rules triggered by the Completed milestone will be activated (if not disabled) when the update is completed. Wait for the process to complete before continuing to work on DevMan.