DONOR ENGAGEMENT

Managing and Refunding Contributions

Bonterra™

Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction

Bonterra™

Agenda

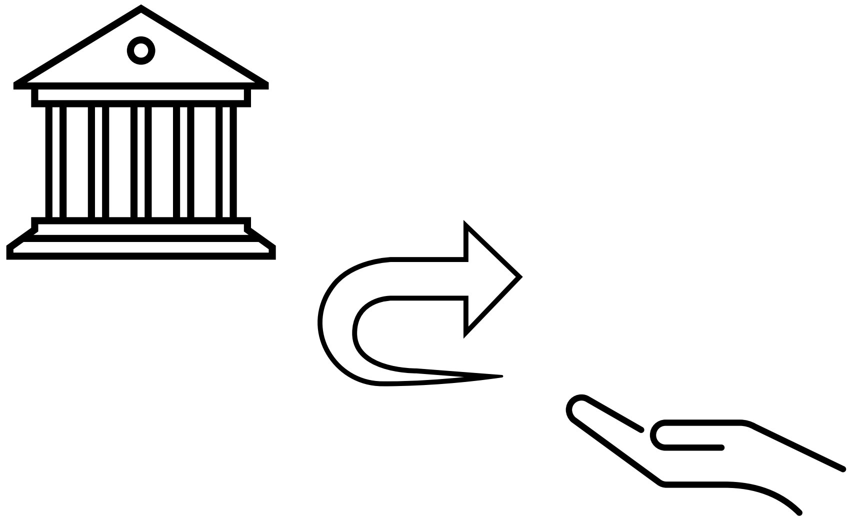
1. Changing the status of made contributions
2. Processing contributions on mobile devices
3. Creating and using Self-Service Pages
4. Q&A

Bonterra

Refunding Contributions

Bonterra™

Refunding Contributions



Before you begin:

There may be times when you need to change contributions already entered in your system, such as:

- when a contribution was entered by mistake,
- when you need to issue a full or partial refund to a donor,
- or when you need to add additional tracking or reconciliation information to the contribution.

- Has the contribution posted to your General Ledger?

- Have you closed your financial batch?

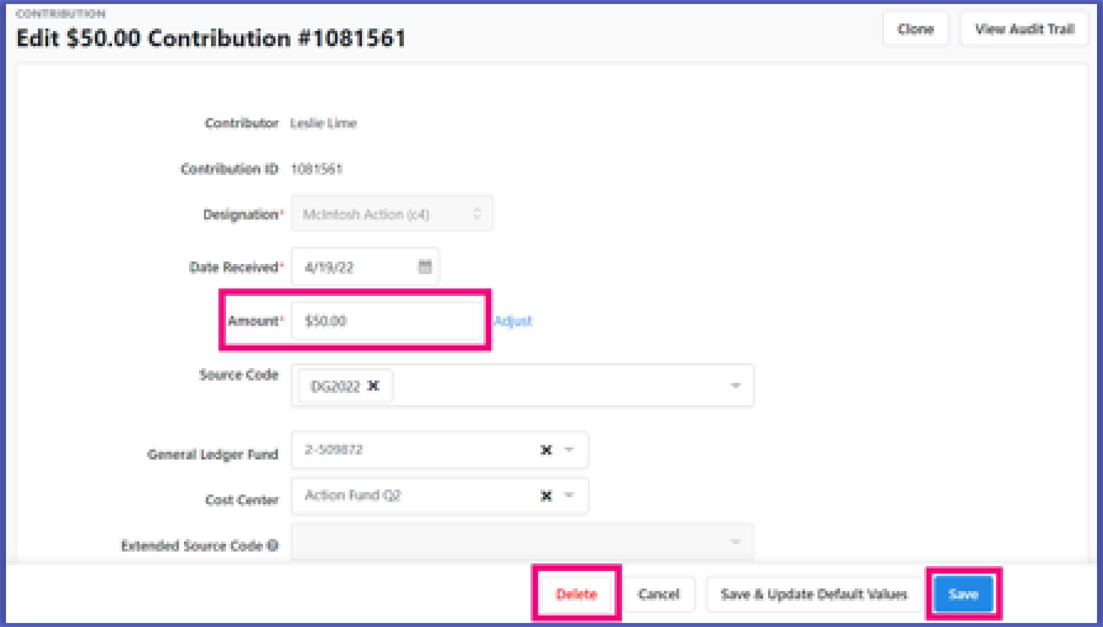
- Has is been settled by your payment processor?

Changing or Deleting Contributions

You can **edit an individual contribution amount or delete the entry** from the contribution details page as long as your **contribution has not yet been settled**, been linked to a membership, assigned a Date Posted, or included in a Closed financial batch.

Steps:

1. Open the **contribution details page** from the **Contribution Report** or from the **Contributions section of the contact record.**
2. Edit the amount and save the changes or delete the entry if you wish to delete the entire transaction.



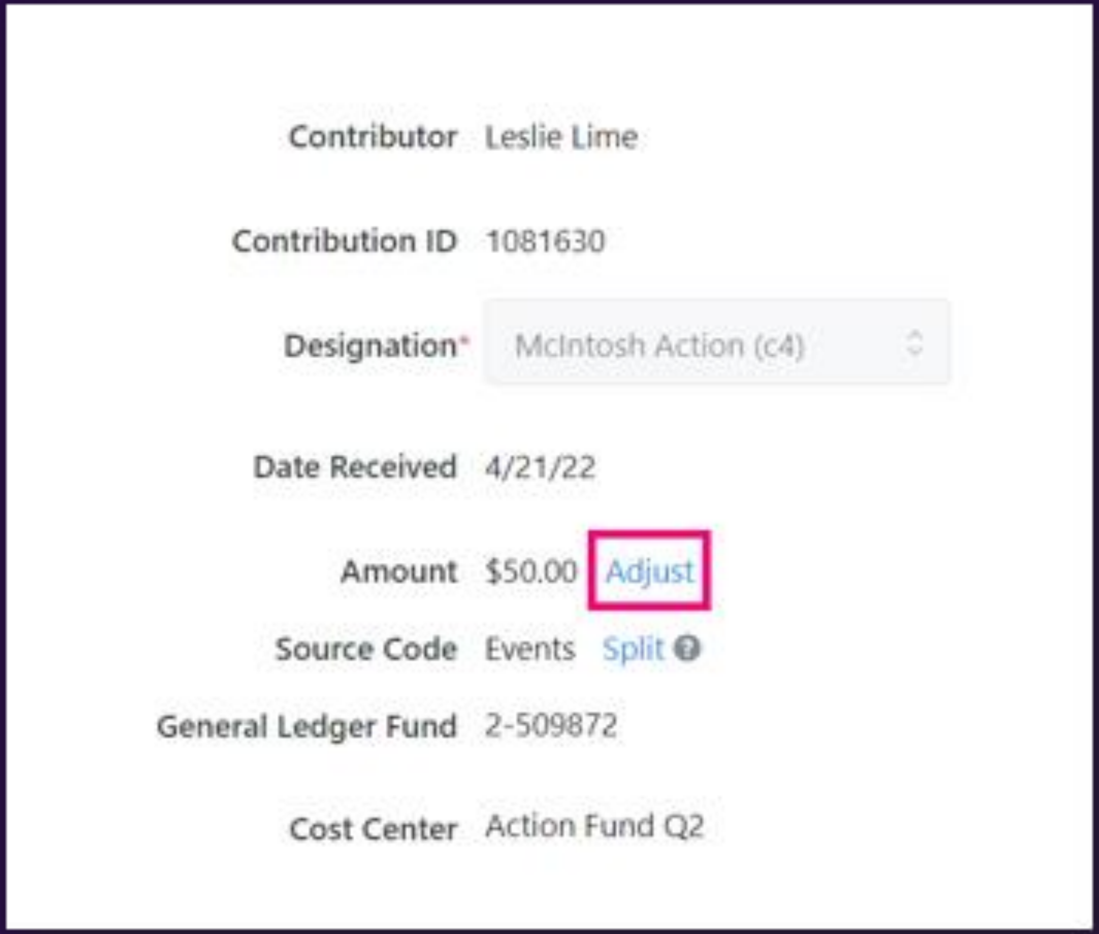
Bonterra

Adjusting Contributions

Once your contribution has been marked as Posted to the General Ledger or is part of a closed financial batch, **certain fields will no longer be editable**. You can, however, make some changes to a contribution by selecting **Adjust** next to the amount or by selecting **Data Adjustment** in the Accounting Information section.

Financial Batch Manager lets you track contributions as group and is usually used to match your accounting records.

When you **select Adjust** you can **change the amount** and **set the Adjustment Type**.

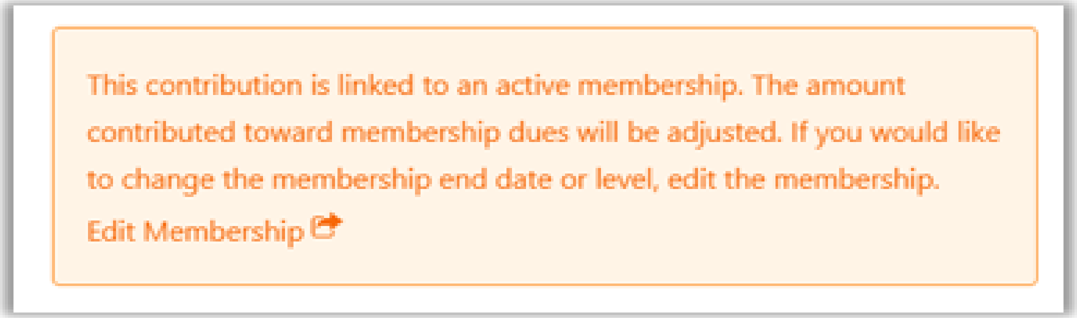


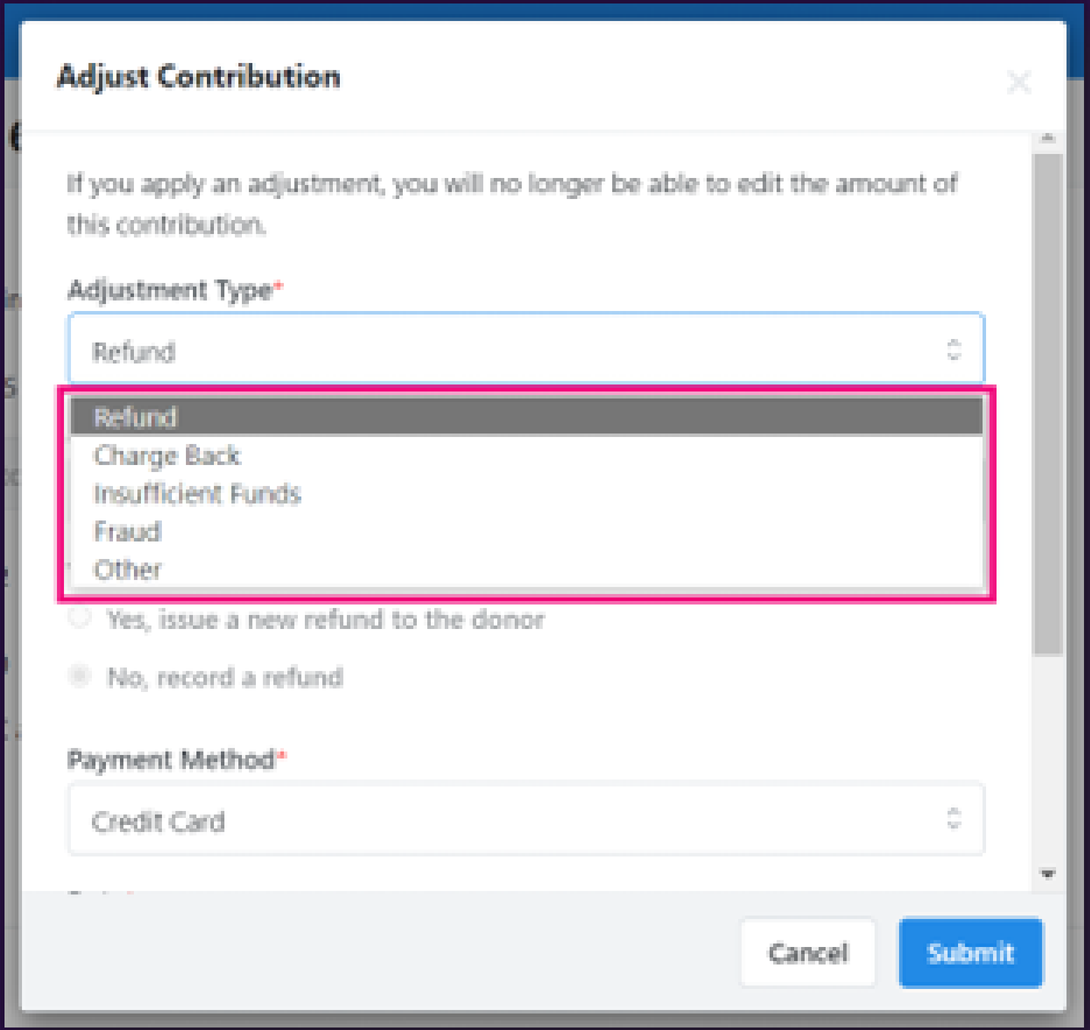
Bonterra

Adjusting Contributions

When you **select Adjust** you can **change the amount** and **set the Adjustment Type**.

Depending on your package, you may also see a **warning** if your adjustment will affect things like membership dues.





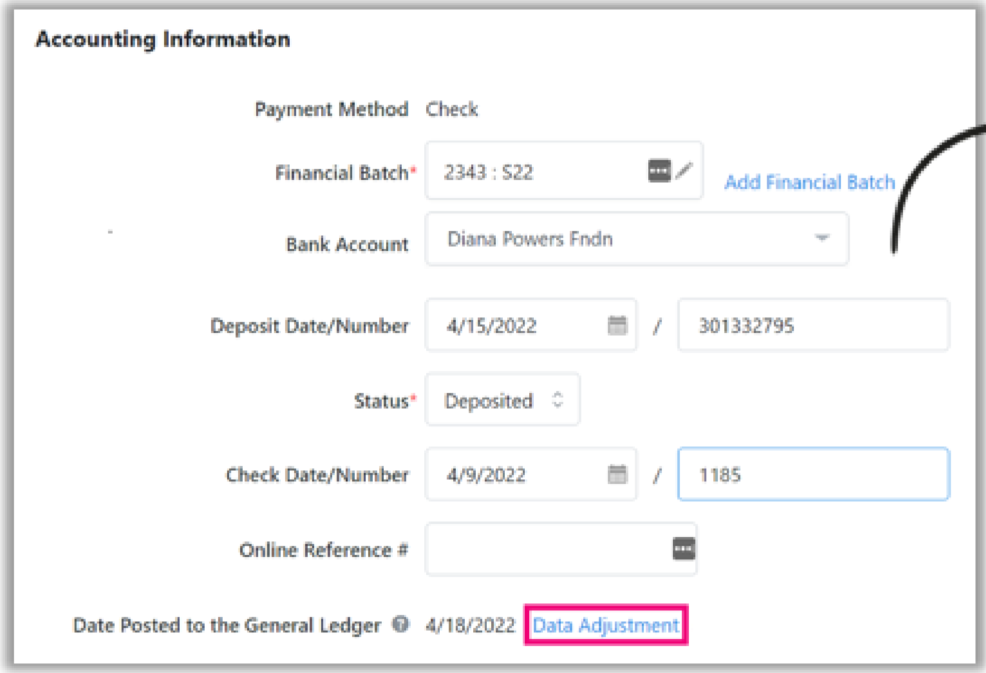
Adjusting Refunds

If the contribution was made via your **integrated payment vendor**, such as Paragon, Stripe, or PayPal, you can process the refund by selecting **Yes, issue a new refund to the donor**. Once you enter the amount and hit submit, this will send the request to your payment vendor.

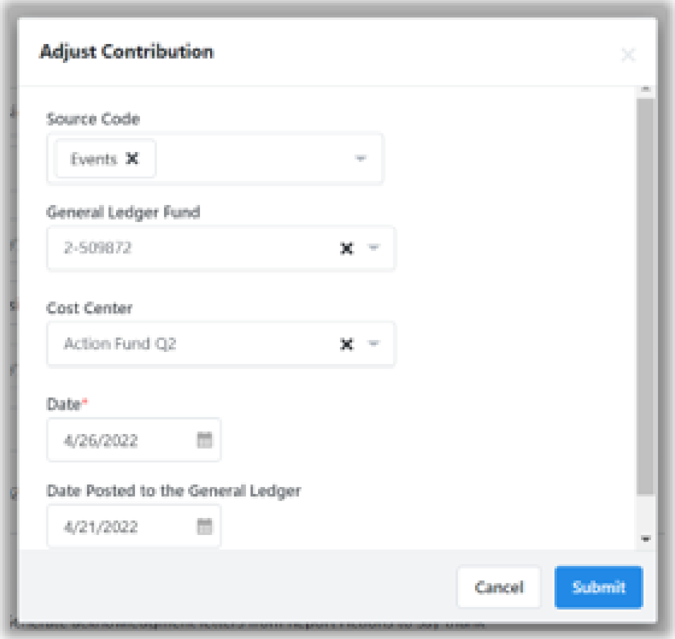
If you just need to update the contribution record **after manually issuing the refund using another payment method, select No, record a refund**.

A **summary of the adjustments** you make will appear on the **contribution page** beneath the original amount.

Recording Data Adjustments



Data Adjustments allow you to **change a General Ledger or a Cost Center allocation** on a contribution without needing to change the source code. Data Adjustments will appear in the General Ledger Adjustments report.

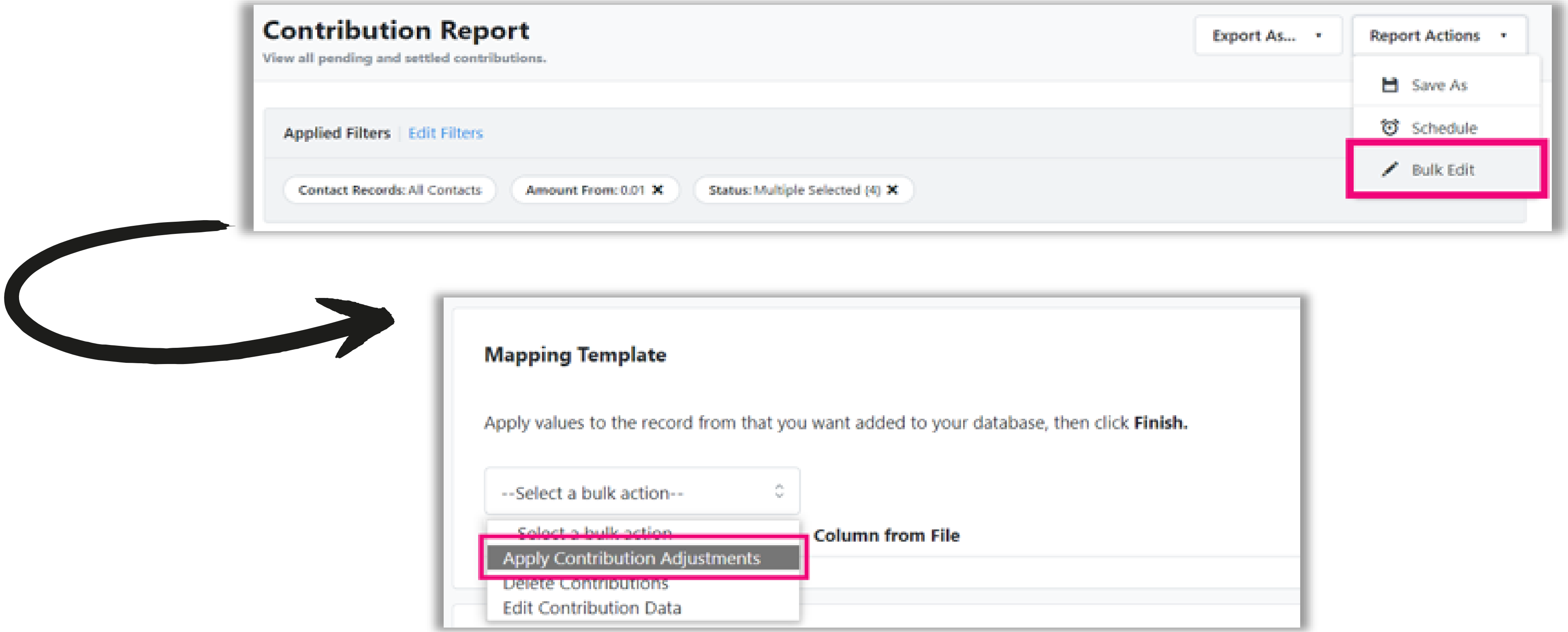


Find Data Adjustment beside Date Posted to the General Ledger in the Accounting Information Section.

From the pop-up window, you can delete, change, or add the Source Code, General Ledger Fund, and Cost Center.

Bulk Editing Adjustments

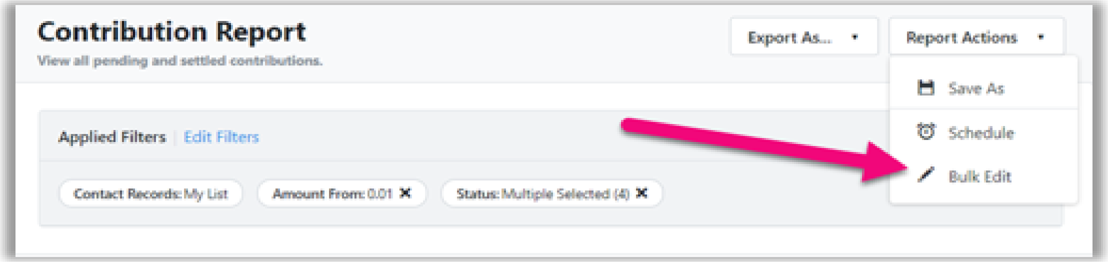
If you want to record adjustments to several records at once, such as when you need to mark several records as chargebacks or as refunds that happened outside our system, you can **use the Contribution Report to quickly update your contribution records.**



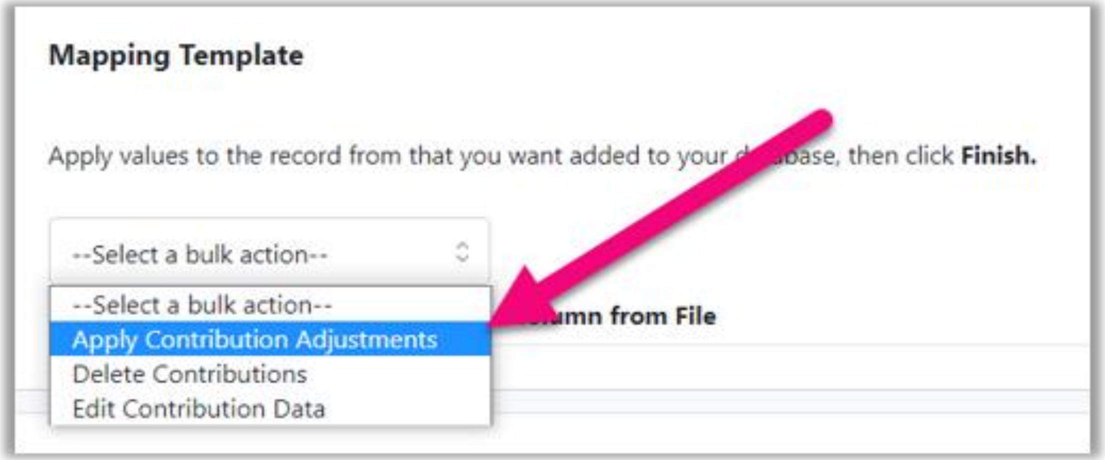
Bulk Editing Refunds

If you want to record refunds to several records at once, such as when you need to mark several records as chargebacks or as refunds that happened outside our system, you can **use the Contribution Report to quickly update your contribution records.**

After filtering the report to the contributions you are updating, select **Report Actions > Bulk Edit.**



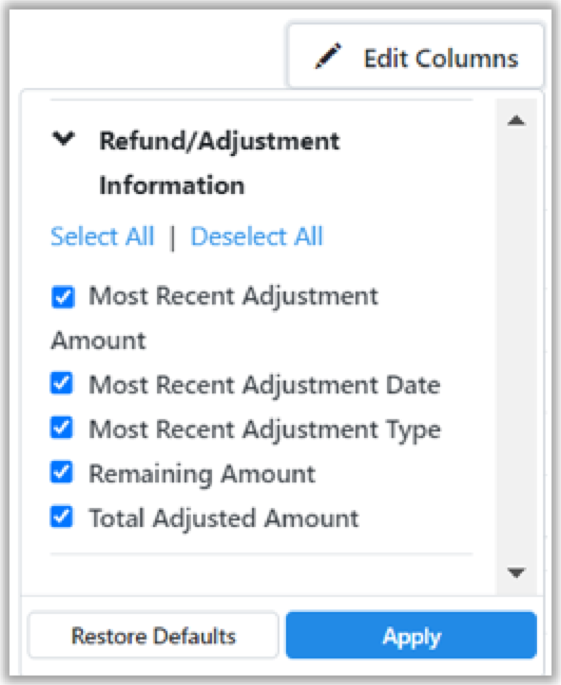
You can then select **Apply Contribution Adjustments to mark several records at once**. After you've updated the details, the Remaining Amount field will automatically change to reflect whether you issued a full or a partial refund.



Using Bulk Upload

If you want to **update several contributions at once with different adjustment details**, you can use Bulk Upload.

Filter your Contribution Report to the contributions you want to adjust, adding columns for Refund/Adjustment Information, and then exporting the file. Make sure you export the Contribution ID column, so you can match the records when you reupload changes.

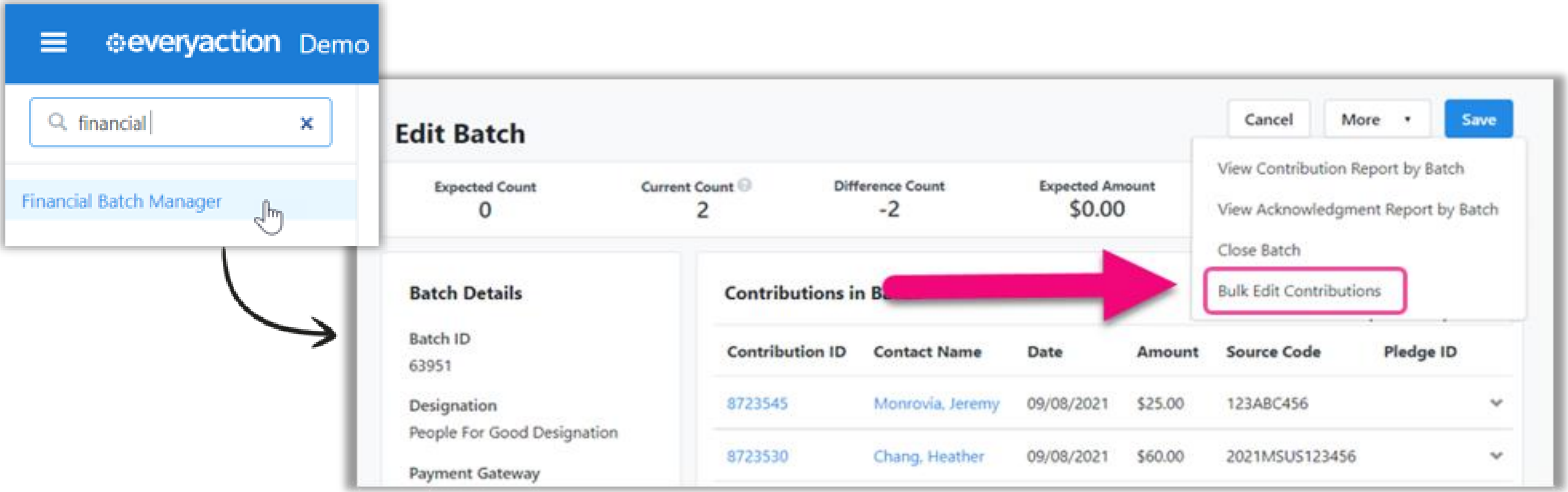


When you adjust contributions that are marked as **posted** or that are **part of closed financial batches**, **update the adjustment details** on the existing contribution and then **include a row for the new/updated contribution** with the correct amount.

Once you've made the necessary changes, you can **re-upload the contributions by the Contribution ID**. Use the Apply Contributions mapping to map the columns with your changes.

Updating Batches

If you are **using the Financial Batch Manager you can do several bulk actions** such as applying a deposit date and number to all the contributions in the batch, using a filtered Contribution Report to make bulk edits, or closing the entire batch.

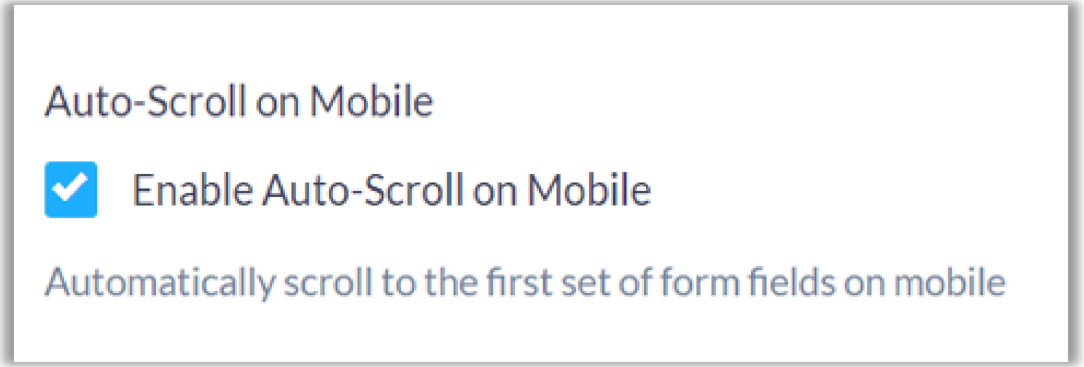


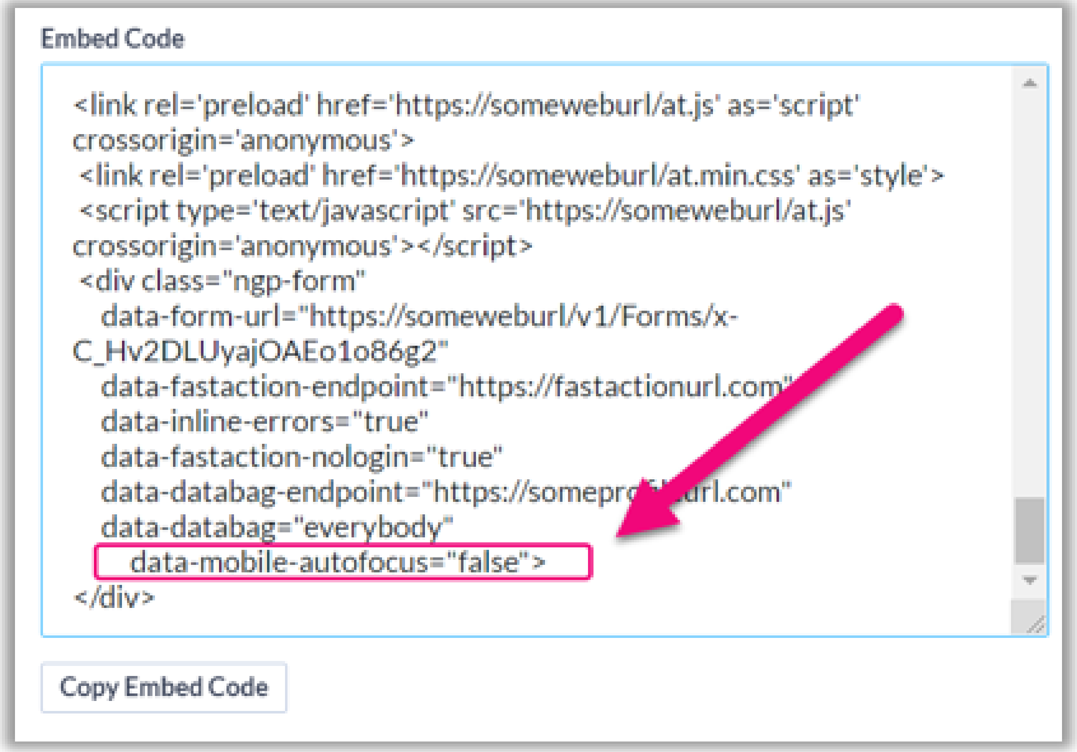
Processing Donations on a Mobile Phone

Bonterra™

Speed Up Data Entry with Auto Scroll on Mobile

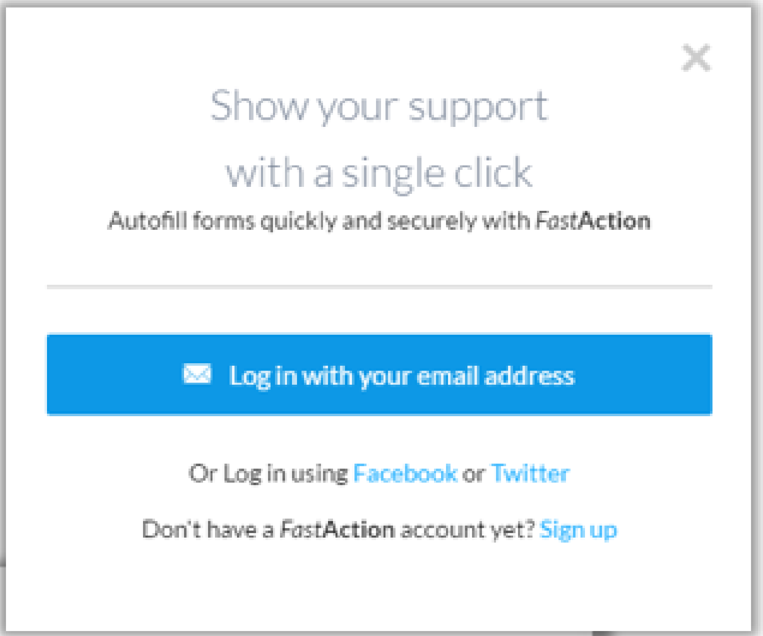
You can make it easier for mobile users to fill in your forms by selecting **Enable Auto-Scroll on Mobile** when creating your contribution form in Online Actions, as well as enabling **Fast Action**.

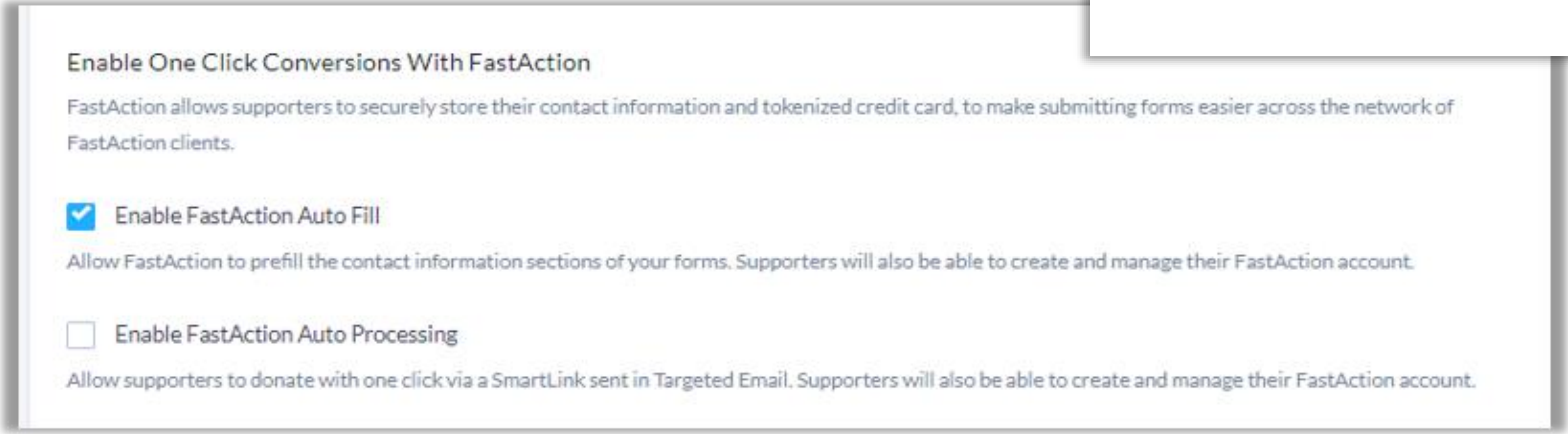




Speed Up Data Entry with *FastAction*

If **FastAction** is enabled on the form, the browser will focus on the **FastAction** menu, allowing your donor to log in, sign up, or log out of **FastAction**. If the donor is already logged into **FastAction**, they will see their forms pre-filled with their personal information.



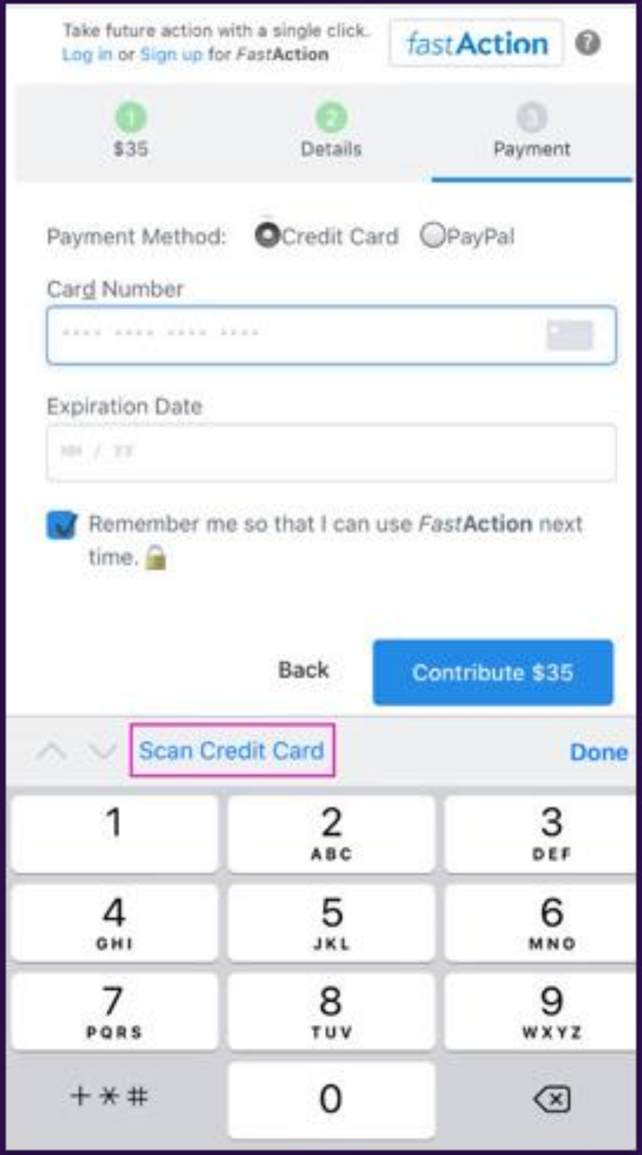


Faster Credit Card Donations

We use a feature available on many mobile devices that allows users to scan their credit card information rather than manually entering the information.

When you click on the **Card Number** field, donors will see the option to **Scan Credit Card**.

Once selected, the device's camera will turn on and scan the credit card information which will then get pushed to the online form.

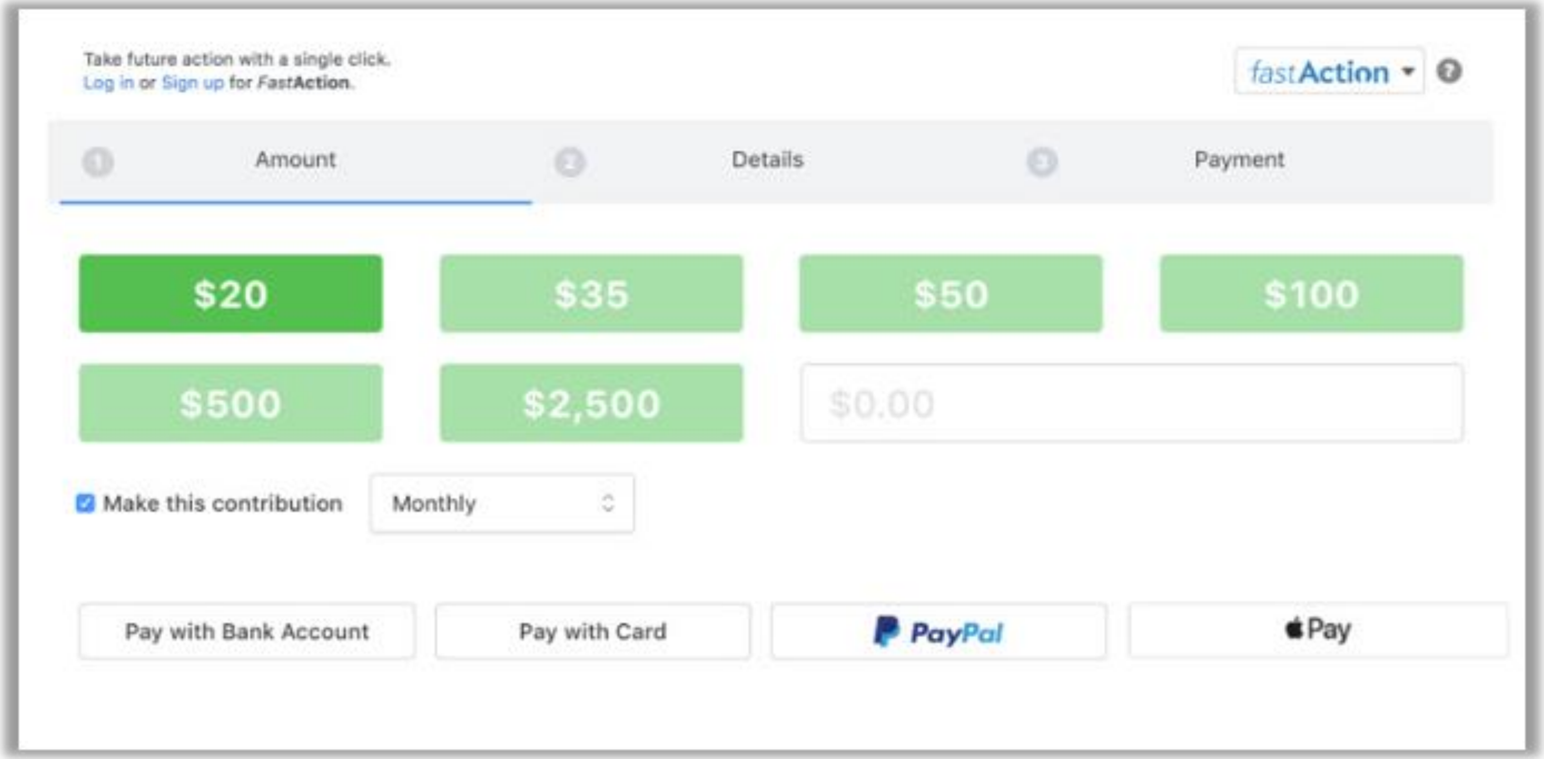


Easy Payment with Apply Pay and PayPal

Apple Pay and **PayPal** already store your donor's name and address.

When a mobile user views your form, they will be asked to select their payment method as soon as they've entered a donation amount.

Their name and address will be added to the form automatically, saving them keystrokes.

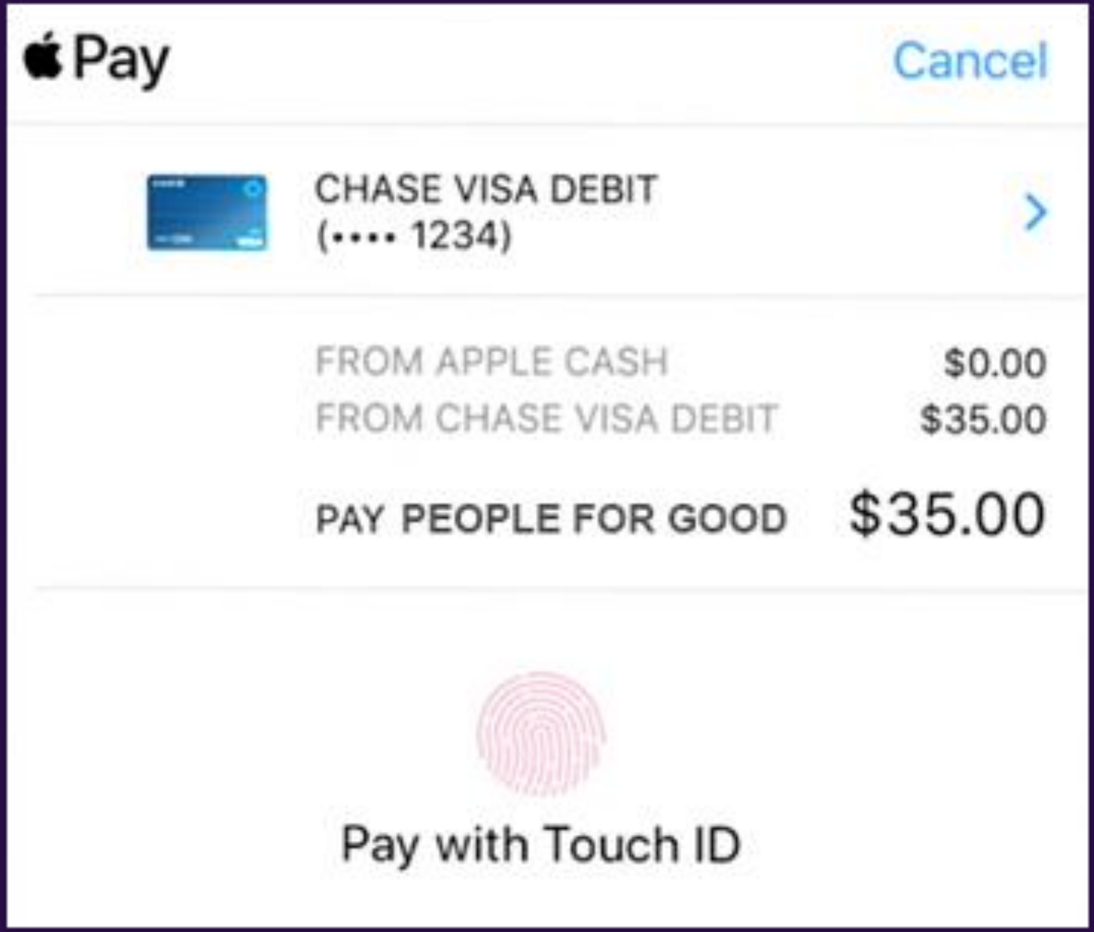


Instant Payment Processing

With our **Instant Payment Processing** setting enabled, we'll attempt to process a donor's gift **as soon as they authorize with Apple Pay or PayPal,** minimizing the data entry and review they need to do on your form.

Instant Payment Processing:

- Enabled on all forms with **Apple Pay/PayPal** (default)
- Best Practice to leave this setting on
- Simple initial contribution forms support quick giving
- Enhanced quick conversion rates



Bonterra

Kiosk Mode at Public Events

If you want to use a mobile device to help you process contributions at a public event, Kiosk Mode is a handy way to prevent your forms from auto-filling information from previous form submissions (via *Fast**Action***).

With Kiosk Mode:

- Each time the page is refreshed, no previous data will appear on the form.
- You can enable kiosk mode for any online page by simply adding the query string “kiosk=true” to your form’s URL.
  - https://secure.EveryActionvan.com/formidentificationnumber
  - https://secure.EveryActionvan.com/formidentificationnumber?kiosk=true

Bonterra

Self-Service Pages

Bonterra™

Self-Service Pages

Audiences increasingly expect organizations to offer a Self-Service portal to **update personal information and view their contribution histories**. Self-service **helps your supporters feel valued by and connected to your organization**, without one-on-one time with donor services.

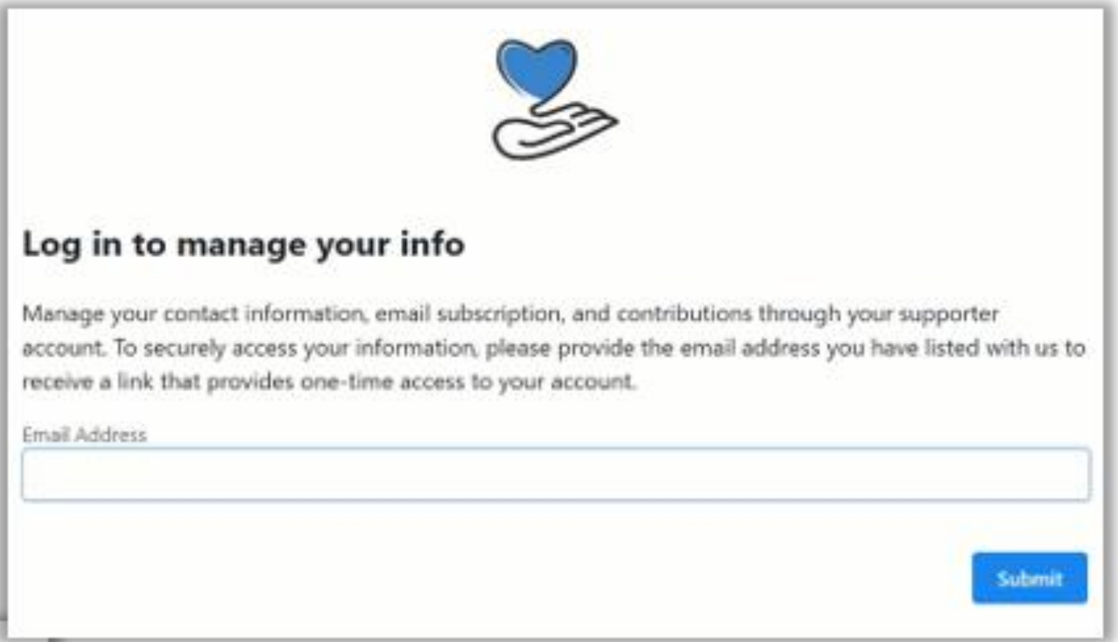
Create as many custom Self-Service pages as you need, using different themes and messaging for specific groups of donors or supporters.

Allow supporters to manage their own records by:

- Upgrading, downgrading, pausing, or cancelling reoccurring commitments
- Viewing their contribution history
- Re-issuing donation receipts
- Updating contact information and preferences, including their email and text subscriptions
- Updating payment method used for reoccurring commitments

Supporter Experience

Your supporters **access the Self-Service portal with a unique link** you provide through **Smart Links,** or they can **use a login request form** that you can enable when you setup the page.



Thanks for requesting a secure login link to update your contact information, modify your recurring gifts, or change your email preferences in our portal.

For your security, this link can only be used once and will expire in 24 hours. Should you need a new link, please feel free to request a new one at any time.

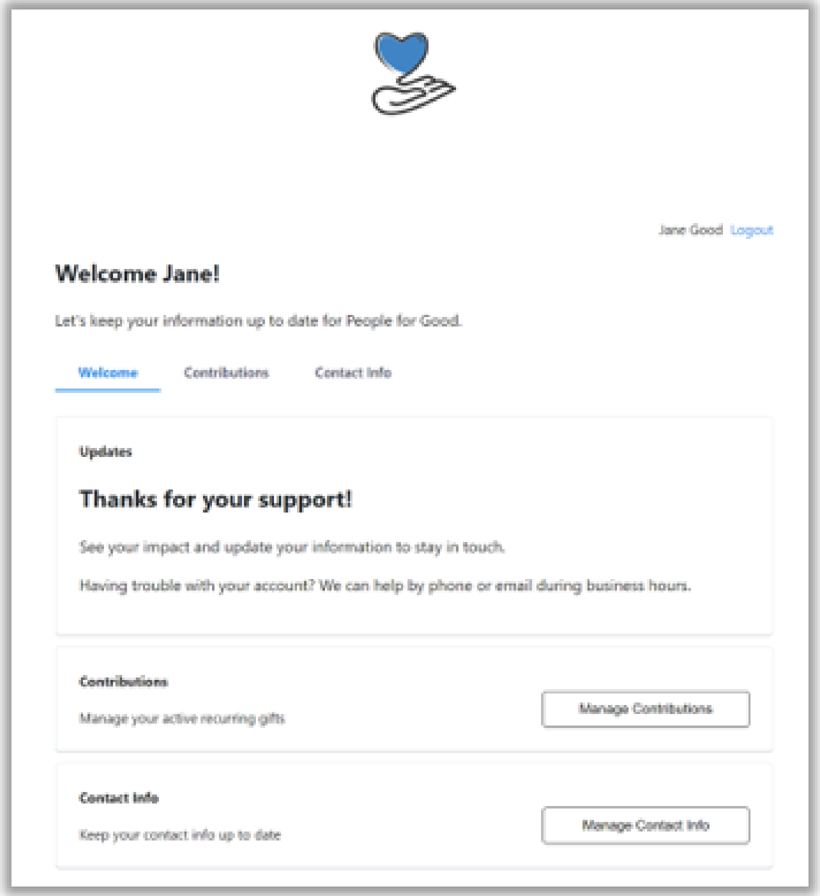
To access your secure portal, click here.

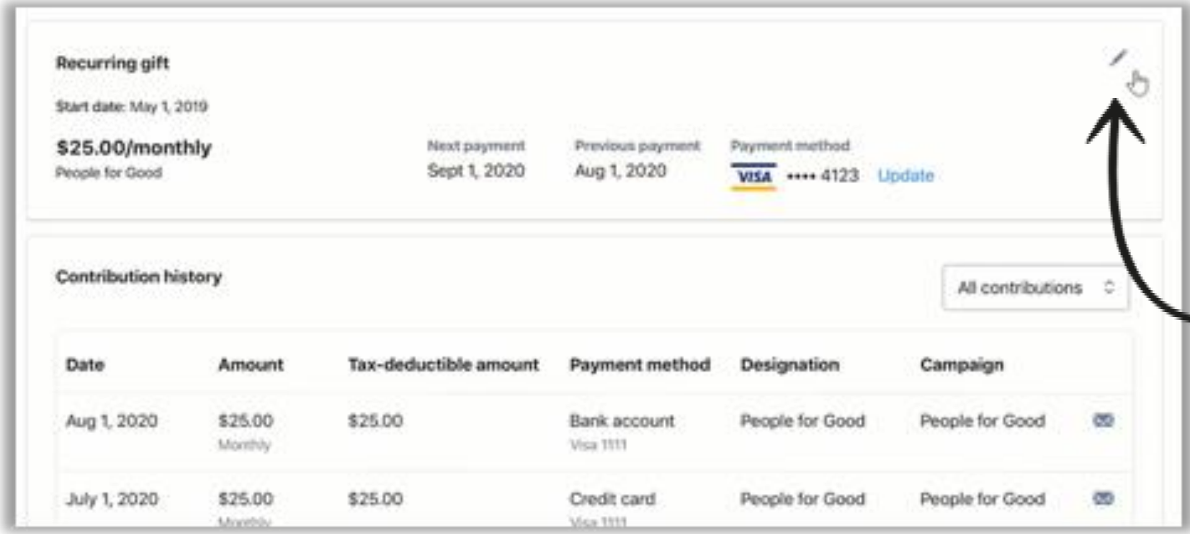
If you did not request this link, you can ignore this email.

After requesting the login, your supporter will receive an email with a secure link to temporarily access the page. **The login and Self-Service page link expires after 10 minutes if the link is not clicked**.

Supporter Experience

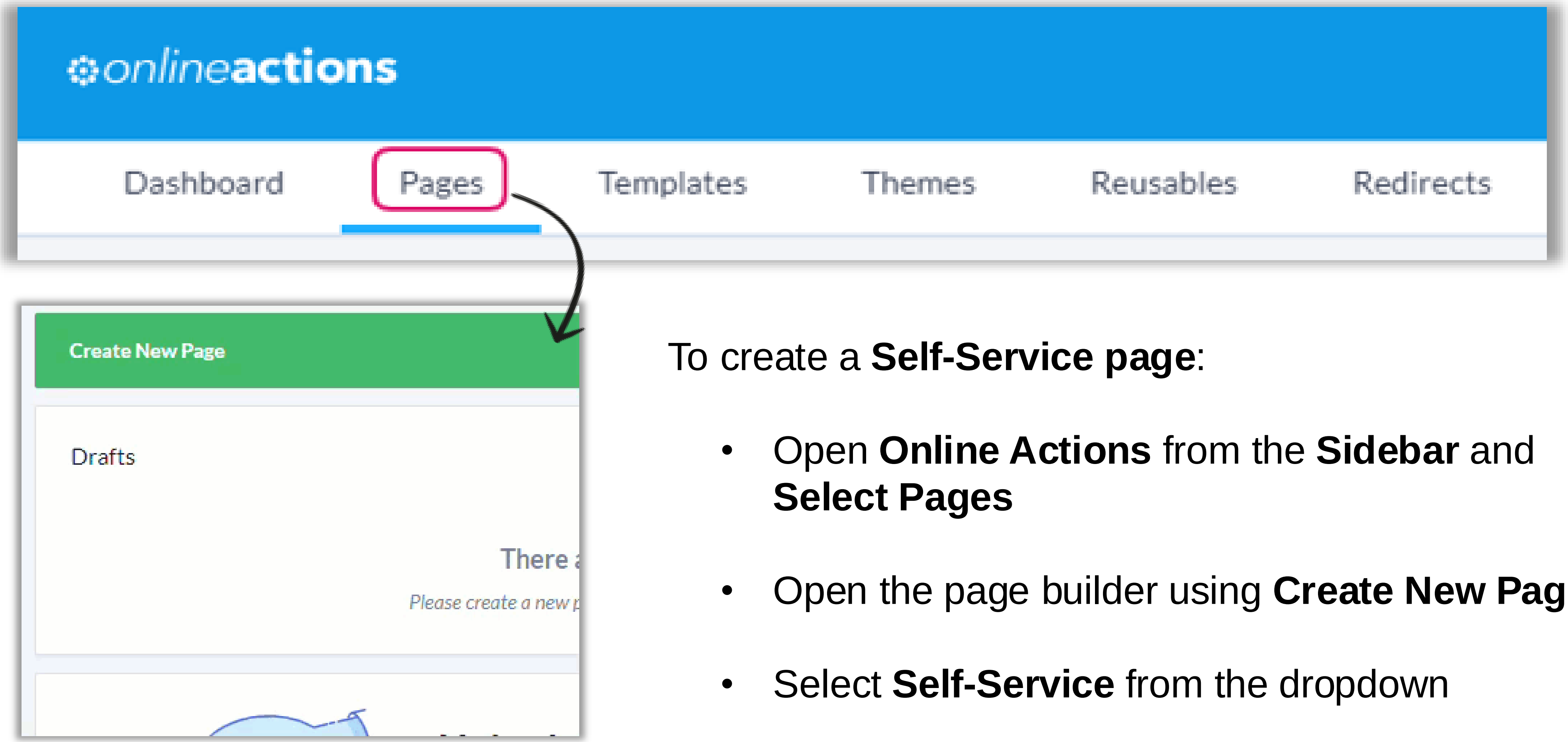
What supporters see on the page depends how you choose to customize it. The basic template has a mobile-adaptive design and sections that expand to show editable details.





Supporters can choose the information they want to Manage and select the Edit link to make updates.

Creating a Self-Service Page



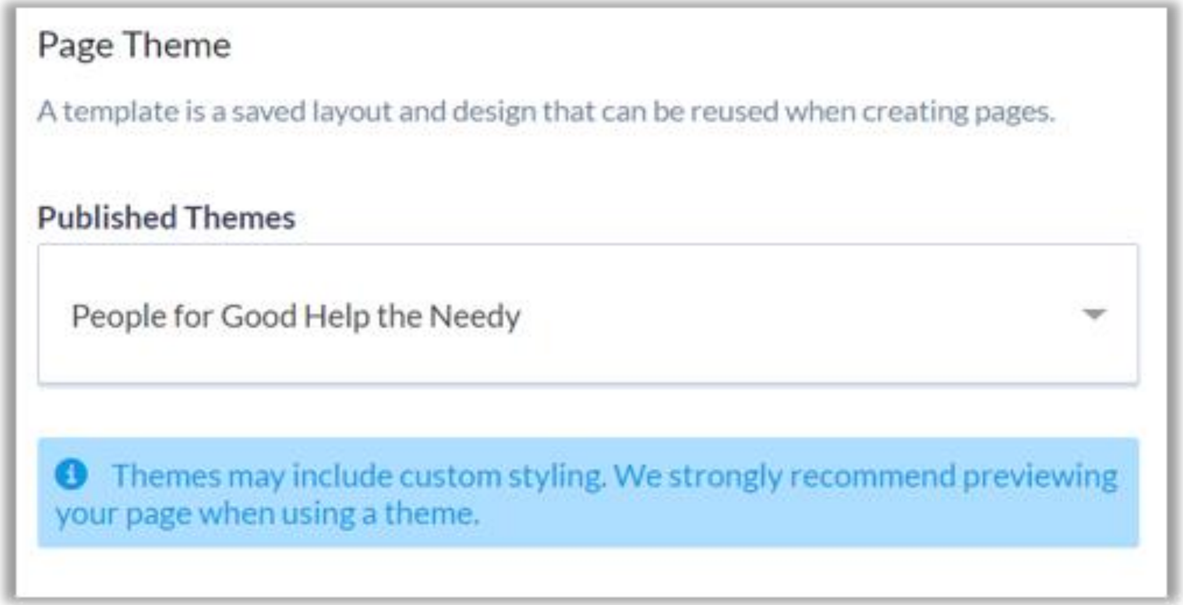
To create a **Self-Service page**:

- Open **Online Actions** from the **Sidebar** and **Select Pages**
- Open the page builder using **Create New Page**
- Select **Self-Service** from the dropdown

Customizing Your Self-Service Page

The **Basics** step is for adding general details and design elements, including:

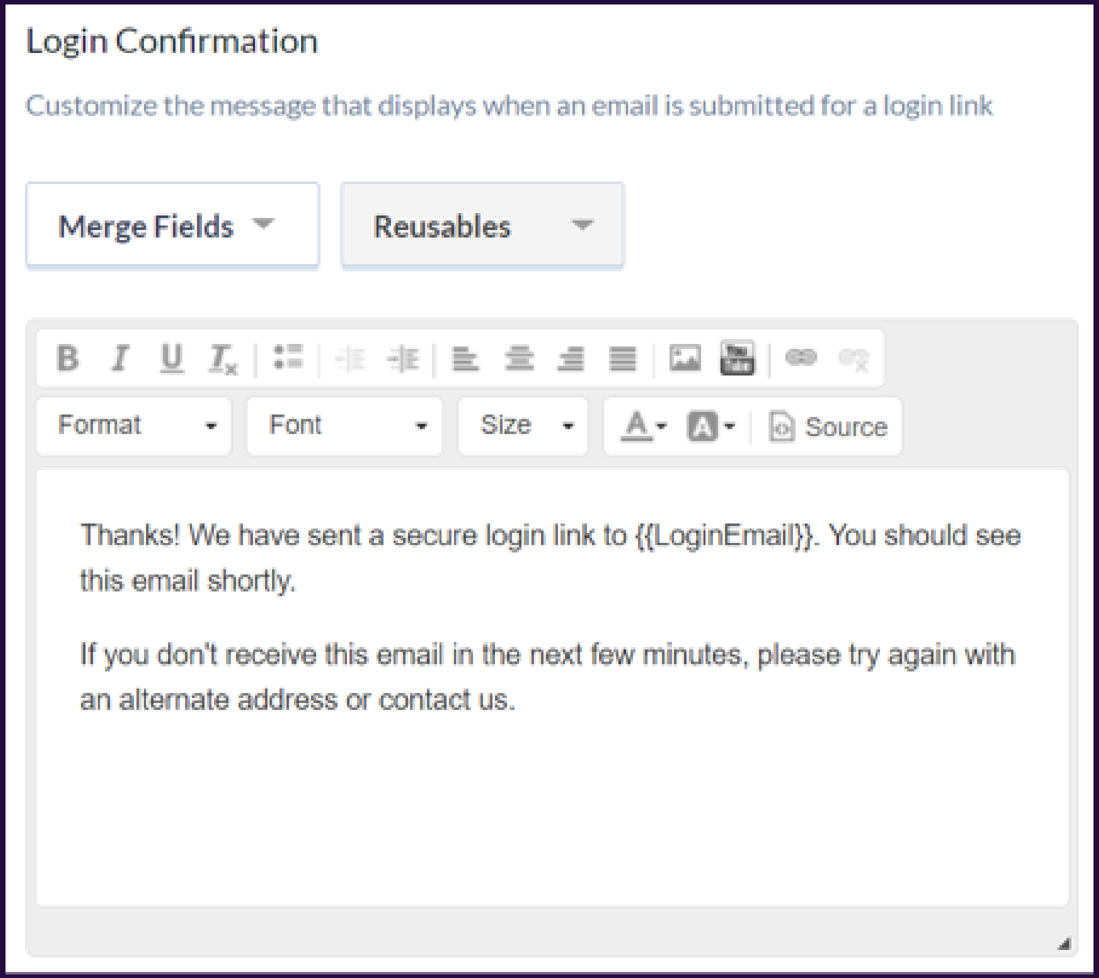
- Page Name—Internal use only
- Title—This title displays at the top of your published page
- Description—This is an internal description and will not display on the published web page or in its meta-data
- Language
- Theme—Templates are saved layouts and designs that can be reused when creating pages
- Headers and Footers
- Google Analytics



Customizing Your Self-Service Page

Login lets you set the web page supporters use to **request the Self-Service page link**.

You can also set the message that accompanies their secure link and the message that appears if an email does not match any of your records.

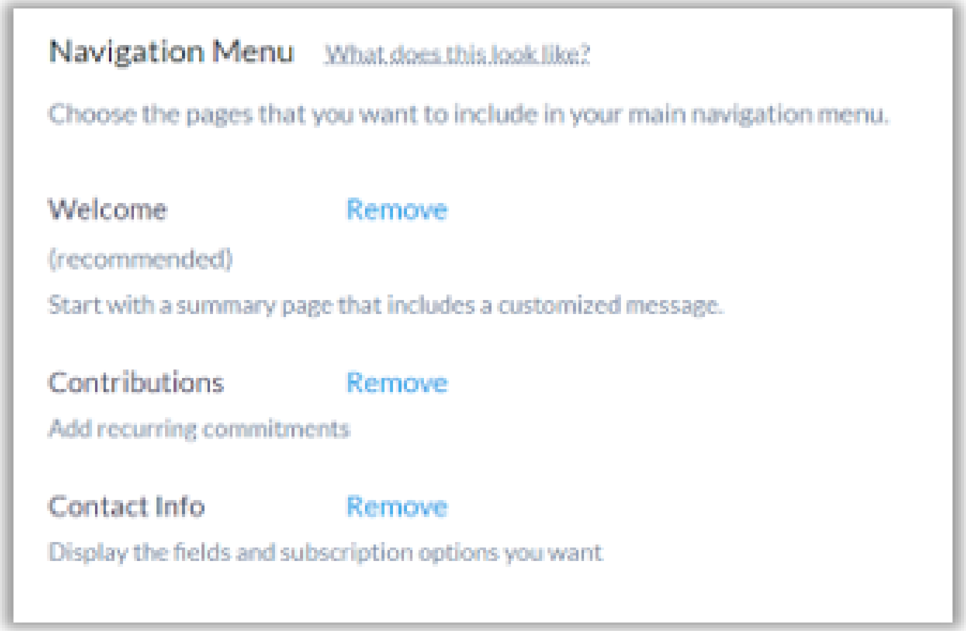


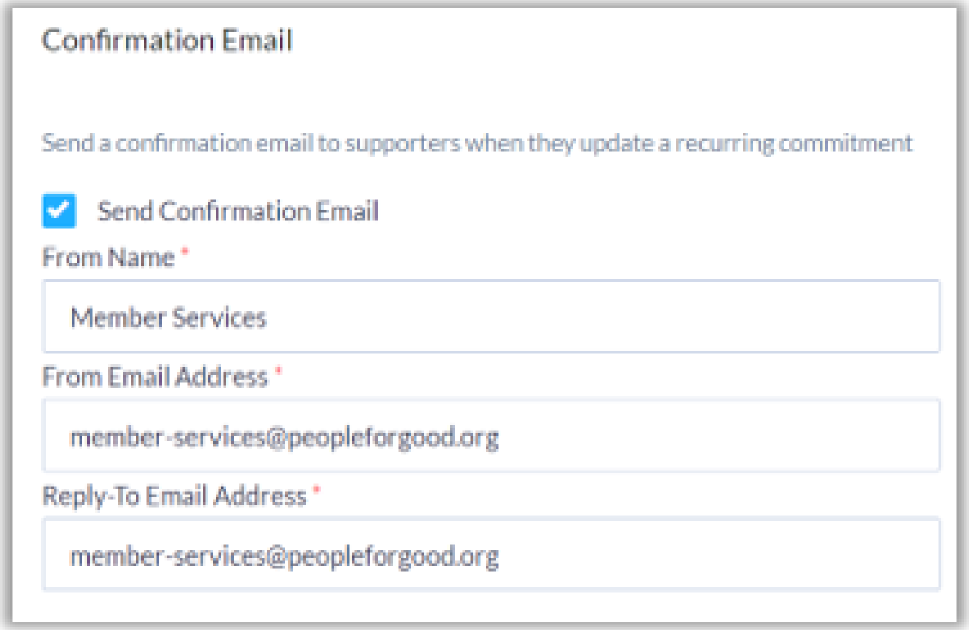
Customizing Your Self-Service Page

The **Build** step is for customizing **how your Self-Service page appears** and choosing the **sections you want included** in the navigation.

The navigation menu consists of Welcome, Contributions, and Contact Info sections.

To **Finish**, set your Logout Confirmation message and a Confirmation Email. You can also decide what supporters will see if you deactivate the page.





Bonterra

Q&A

Additional Resources

Bonterra™

Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM

Bonterra

Help Center Resources

- Adjust or delete contributions in EveryAction
- Best Practices: Processing Donations on Mobile Devices
- How to: Create Self-Service pages
- Using Self-Service Pages Tutorial
- Account Reconcilliation
- Record Keeping for Compliance
- Bulk Editing Contributions
- Using FastAction

Additional Training

- Bonterra Academy: Bonterra Academy Self Signup
  - Foundational Webinar Series
  - Upcoming initiatives
  - Videos in Bonterra Academy

Bonterra

Thank You for Attending!

Bonterra™