**BBIS Giving Form Digital Philanthropy Center**

Hi Greg,

I went through the Giving Form and made some notes, based on the original feedback and changes since then. New items are in red. This testing was done in Microsoft Edge (the browser that will be exclusively used for this form).

1. Add the same dropdown fund options that are on the current ADF at giveto.uc.edu. Using the example Greg provided on [https://bbis5740pssandbox.blackbaudhosting.com/adf](https://nam11.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbbis5740pssandbox.blackbaudhosting.com%2Fadf&data=04%7C01%7CVISSING%40ucmail.uc.edu%7Ce7ab358ff8d3407b622708d8c3302134%7Cf5222e6c5fc648eb8f0373db18203b63%7C1%7C0%7C637473958768864558%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=2IYuMY35I8O6dem9tHVLAjs2V89QtzPmE%2FGlInmMw5Y%3D&reserved=0) for design but the funds as they are organized on [https://giveto.uc.edu/](https://nam11.safelinks.protection.outlook.com/?url=https%3A%2F%2Fgiveto.uc.edu%2F&data=04%7C01%7CVISSING%40ucmail.uc.edu%7Ce7ab358ff8d3407b622708d8c3302134%7Cf5222e6c5fc648eb8f0373db18203b63%7C1%7C0%7C637473958768874547%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=enbXBlKuU41%2BFgKI3xv%2FDwFmdJ%2Bx6AXX7%2FMEzLH4Ick%3D&reserved=0).
   1. This is done, but could use some cleaning up.

                                               i.     The funds take a while to load (30-60+ seconds). Is there anything we can do to speed that up?

                                              ii.     Can we change the order of the main categories? If so, please order them The UC Fund, Colleges/Units, Scholarships, UC Health.

                                            iii.     Under the UC Fund and Scholarships, you have to select a second-level category, even though there is then only one fund per category/unit. Is it possible to remove the middle step, so that when you select UC Fund, you immediately see a list of the funds?

                                            iv.     I am still have an issue using Microsoft Edge with the check box for each fund. It simply doesn’t fill with a check mark. Sometimes it does (possibly in other browsers), but usually it does not.

                                             v.     When you don’t see a check in the box, it is natural to hit the box again. Interestingly, when you do this it adds the fund again to you list. But, when you hit “remove fund,” it removes all iterations of that fund. Not sure this matters but it was not what I expected.

1. Like the search tool, but it doesn’t generate the list properly. When you type UC Fund, it doesn’t bring it up without a lot of scrolling. I believe this is because it is also looking at the attribute values when searching. If we limit it to look only at the fund name, we might be OK.
   1. This does not appear to be fixed. When I type “UC Fund” there are still a lot of funds before the correct results. I think it is still searching the values of the attributes in addition to the fund names.
2. Some funds, mainly UC Funds, are showing up twice. We think this is because they appear in two categories (UC Fund and College/Unit). Is it possible to limit just one result per fund?
3. Change “Make this a recurring gift (starting today)” to “This is a recurring gift.” – Close, but I still think removing “Make” is more intuitive to the caller and we need to remove “starting today”. Please change the text to say “This is a recurring gift”
   1. Shawn is going to look into the start date question. Does it not need to be on the 1st or 15th? Shawn determined that only allowing recurring gifts to start on the 1st or 15th was preferred. This is working correctly.
   2. I like the end date thing. But change the verbiage to “Set an end date (if left unchecked, gift will be ongoing)” This is fine.
4. Change “Make this a new pledge (starting today)” to “This is a pledge (no payment)” This has not changed
5. Please can we try adding “semi-annually” to the list of frequencies and seeing if it comes through to batch, or not. Perhaps try with a value of 5. If it doesn’t work, we will scrap this idea.
   1. Did you look into this? Any luck?
      1. Can’t do this
6. For number of installments, can the default be 1?
   1. Is there anything we can do to force “number of installments” to “1” if the user selects “One-Time” as the pledge frequency?
   2. I talked to the DPC team and we think we should limit the options here to just one-time gift. This would mean we can get rid of the number of installment field and the end date field. We would just need the start date. We’d like to look at adding other options later but stick with one-time for now.
7. Remove the end date box. The end date is simply determined by the start date and the number of installments. If we go with just one-time, we won’t need the end date.
8. Change “I work for a matching gift company” to be “Donor works for a matching gift company” Fine
9. Remove corporate gift option
10. Change “I would like to make this gift anonymously” to “Donor wishes to remain anonymous” Fine
11. Remove the credit card fee option.
    1. Done, thank you.
12. Is finder number (efndnum) working? Example, link would be [https://ucfoun-stg-bbis.concoursehost.com/dpc?efndnum=362300667](https://nam11.safelinks.protection.outlook.com/?url=https%3A%2F%2Fucfoun-stg-bbis.concoursehost.com%2Fdpc%3Fefndnum%3D362300667&data=04%7C01%7CVISSING%40ucmail.uc.edu%7Ce7ab358ff8d3407b622708d8c3302134%7Cf5222e6c5fc648eb8f0373db18203b63%7C1%7C0%7C637473958768874547%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=%2BQkvnbZXwTR%2F2c1aoPjONtXJgmbdWUyn5E%2FlPwGHYsM%3D&reserved=0).
    1. This is working. Good stuff.
13. What are the names of the fields in order to prepopulate? Could you send me a list so I can test? Example would be [https://ucfoun-stg-bbis.concoursehost.com/dpc?efndnum=362300667&fstnm=James](https://nam11.safelinks.protection.outlook.com/?url=https%3A%2F%2Fucfoun-stg-bbis.concoursehost.com%2Fdpc%3Fefndnum%3D362300667%26fstnm%3DJames&data=04%7C01%7CVISSING%40ucmail.uc.edu%7Ce7ab358ff8d3407b622708d8c3302134%7Cf5222e6c5fc648eb8f0373db18203b63%7C1%7C0%7C637473958768884547%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=zfrH%2Fnaydlgpl9cPbPGVvtNhqgLgNLcWOvcgpR8lKpI%3D&reserved=0) (where “fstnm” is first name).
    1. This is working great with the exception of country (cntry), which does not seem to populate. Is that because there is a list of values with a number assigned? In fact… can we remove the country field altogether? We only call people in the United States. If we can’t remove it, can we default it to United States?
    2. The capital letters get lost in the URL. Is there anything that can be done about this? If not, Shawn, will that cause a problem when the gifts are processed? For example, 1159 Summerlake Drive goes into the form as 1159 summerlake drive. Capital letters in the name fields and city field work fine.
    3. I noticed the address and anything after it in the URL fails when there is a comma, which VanillaSoft inserts between two address lines. This is a VS issue for me to investigate.
14. We want to try tracking the name of the caller. Ideally this would happen by adding the caller/employee’s record ID from icats (e.g. e441f9e8-e543-4c59-a2a7-b8804387f67e) to VanillaSoft, then adding it to the link and having it prefill a “solicitor” field on the form. The field could be hidden. This would, theoretically, then tie the gift to the actual employee in CRM. Shawn is going to look into this.
    1. Can we revisit this? Think we just need to add a simple attribute in CRM and then make sure we add the field to the form.
    2. Alternative option would be an attribute and we’d track the caller ID, but that’s less fun 😉
15. Is there any way to avoid the payment page? It is so duplicative. Not the end of the world but not ideal.
16. We need to make a copy of the payment part 2.0 so that we can change the confirmation message and email.
17. Having the pledge option on the payment 2.0 part is annoying, because it adds a rather small box where there user selects credit card or pledge. If you are doing a pledge, it is easily missed.
18. Only round numbers work – we need to be able to accept decimals. Our third ask is $18.19, so this is essential!
19. The summary page for pledges is confusing as it says $0. Can we clean up this language?

Thank you, Greg. I look forward to going through this in the morning.

**12/21 Assignments:**

* Shawn
  + Find out from BB if it is possible to route different donation transactions to different batch templates, based on the specific giving page.
  + Determine if we can make “Credit Card Type” no longer required on the existing batch.
  + Activate test credit card payments in staging so that we can test transactions..
* Greg
  + Talk with Tyler and determine if we should use ADF or SDF (ADF is preferred if the customizations are possible)
  + Explore adding the following options to the ADF
    - Recurring gift frequency of “Semiannually”
    - Recurring gift end date
    - Pledge installment start date.
* James
  + Provide test transactions on SDF.

**Design Concept**

All outright gifts and pledges from the Digital Philanthropy Center will be captured by BBIS. The student associate (caller) will enter the information directly into a BBIS form). The benefits of this method are as follows:

* Limits data passed through SFTP
* All payment card information entered via BlueFin device (encrypted)
* Single process for gift processing team – all BBIS and DPC gifts entered through same batch
* Recurring gift functionality
* Reasonably simple for callers – some repetitive information to enter but better options for selecting designations

When a caller is ready to enter a pledge of gift, he or she will click on a URL in VanillaSoft. The URL can include merged data, including finder number. This will allow tracking of gifts to DPC and may enable some fields of the form to be pre-populated upon load.

Callers will access the giving form on the Microsoft Edge browser, which will be the only browser available on the DPC computers. The form will open in a new tab.

**Design Requirements**

The DPC Giving Form has the following requirements.

*Deal breakers – minimum requirements:*

* Be user-friendly and quick to use
* Capture finder number and appeal via pre-populated URL (“?efndnum=XXXXX” must prefill the finder number field)
* Allow customized acknowledgement emails to be sent
* Allow one-time gifts, recurring gifts, and pledges (no payment information provided)
* Allow choice of designations
* Allow gifts to have multiple designations

*Ideal requirements:*

* Allow a recurring gift to have an end date
* Allow a recurring gift to be monthly, quarterly, or semiannually
* Allow a pledge to have a due date entered or left blank if due immediately
* Enable constituent data fields to be prepopulated via the URL (e.g. “&firstname=James&lastname=Barnard).

***ADF vs SDF***

The standard donation form has out-of-the-box functionality that allows pledges. A version has been created in staging: <https://ucfoun-stg-bbis.concoursehost.com/donate>.

While the SDF is easy to configure, it has limited options.

* SDF does not allow a recurring gift frequency of “Semiannually,” which is desired.
* SDF does not allow a pledge due date (Installment Start Date) to be entered, which is desired.
* SDF has limited functionality around designations – the user must choose from a list. When the desired designation is not on the list, it must be entered in a comments field, which causes a issue for gift processing.

The ADF has some benefits, and if possible, a customized version of this would be an ideal solution.

One possibility would be to go live initially with the SDF and switch at a later date to the ADF.

***Formatting***

Minimal formatting cleanup is needed to prepare the DPC Giving Form.

* Plain white page with no menu or links to any other pages
* UC Foundation logo at the top of the page
* Short text area – James to provide text – to identify use of the page
* Ensure all appropriate fields display correctly
* Ensure compatibility with Microsoft Edge (used on DPC computers)

In the event that the ADF is used, we would ideally remove some functions of the form to reduce its size:

* Remove pledge payment tab, replace with pledge
* Replace monthly gift with recurring gift
* Remove suggested donation amounts and require user input only (other amount)
* And end date and semiannually frequency for recurring gift options
* And due date for pledge
* Make title field not required

***Page Setup***

The DPC Giving Form should be located at **giveto.uc.edu/dpc**. The URL is intentional ambiguous. The page is not intended to be visited by the external public, though preventing this entirely is not possible.

**Outstanding Questions**

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| **Question** | **Notes/Solution** | **Responsible** |
| ADF vs SDF  Should we use the Advanced Donation Form (ADF) or Standard Donation Form (SFD)? |  | Greg/Tyler – review specifications to determine |
| **Batch Template Routing**  Can BBIS donation transactions be routed to two different batch templates? Doing so would allow us to tweak the template without having to change it for all transactions. | On the existing batch, credit card type is a required field. As there is not CC type for pledges, the batches fail. | Shawn – checking with BB Helpdesk  James – exploring BBIS setup functionality |
| **Pledge Due Date**  Can we capture “Installment Start Date” on a BBIS giving form? This is an option available on a batch template. Allowing it to be populated on a BBIS form would enable us to set a pledge due date other than today. |  | Greg – explore BBIS functionality |
| **Semiannual Frequency**  Can we set a frequency for recurring gifts of “Semiannually”? This is a desired option for DPC and is available in the batch template, but currently not an option to choose from on the BBIS SDF. |  | Greg – explore BBIS functionality |
| **Prepopulating Form Fields**  What are the names of the key fields in the form? Are we able to insert those into the URL to prepopulate the form?  Desired fields:   * First Name * Last Name * Address Line 1 * City * State * Zip * Email * Phone | Currently the finder number is successfully being transported via the URL to the giving form. | Greg – identify form field names/codes  James – testing VanillaSoft functionality |
| **Testing Transactions**  We will need to test one-time gifts, recurring gifts, recurring gifts with end dates, pledges. |  | James – enter test transactions  Shawn/Emily – review batches |
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