Donor Rollover

Overview

Monthly donors have to be manually rolled over every 12 months. This process covers how to roll over a group of donors.

Download donor list from CRM

1. Login to CRM.
2. Navigate to the Gifts view of CRM by (1) clicking the main navigation menu, (2) clicking **Development**, and finally (3) clicking **Gifts** under Gift Processing.
3. Open the Rollover view by clicking **All Gifts** and selecting **Rollover**.
4. Start an advanced find by clicking the advanced find () button in the upper right corner of the window.
5. Set the filter criteria as follows:
    - Gift Type Equals - Pledge
    - Rollover Gift Equals – Renewing 12-month commitment
    - Installment Start Date On or After – 1st day of the month
    - Installment Start Date On or Before – 1st day of the month
    - First Payment Date On or After – 1st day of the month
    - First Payment Date On or Before – 1st day of the month

- Status Reason Equals - Fulfilled; Paid in Full (deprecated); Partially Paid; Unfulfilled

6. Click **Results**
7. Click **Export Gifts**
8. Select Save File and click **OK**
9. Navigate to the folder on the network share
10. Click **Save**

Create text file

Prepare data

1. Open Excel file.
2. Click **Convert to Range** on the Design tab and then click **Yes**.
3. Unhide columns A-C and delete them.
4. Select all the data in the spreadsheet except row 1.
5. Click **Data Validation** on the Data tab and then click **OK**.
6. Click **Clear All** and then **OK**.
7. Click **Sort & Filter** on the Home tab and then click **Custom Sort.**
8. Select the Installment Start Date column (column O) to sort by and click **OK**.

Create fulfilled file

1. Delete any rows that aren't normal. (i.e. weird dates, no external pledge ID, not fulfilled)
2. Delete the following columns:
    - Gift ID, Status Reason, Total Paid, Balance Due, Last Payment Date, and First Payment Date
3. Label column T Premium 1

4. Check that the donor is a 12-month donor by entering the following equation into row 2 of column S and copying the equation into the rest of the rows in column S.

   - =IF(E2=L2*12, “Y”, “N”)

5. Delete all the rows where column S equals **N**

6. Update the date received (column A) for all rows to today’s date.

   Note: Holding down **Ctrl** will prevent the date from incrementing as the date is dragged down.

7. Change the appeal code (column F) for all rows to SYEAR (i.e. S2015).

8. Change the gift column (column I) to Renewing 12-month commitment.

9. Increase the installment start date (column J) by one year.

10. Use **Custom Sort** to sort the data by gift amount (column E) AND state (column R) by clicking **Add Level**.

11. Add Premium code 3456 to column T for every row where the gift amount is between $500 and $1000 and the state is WA.

12. Add Premium code 3457 to column T for every row where the gift amount is $1000 or more and the state is WA.

13. Delete column S

14. Save the file on your desktop as a tab-delimited text file by clicking **Save As** and changing the ‘Save as type’ to **Text (tab delimited) (*txt)**.

Add a gift to CRM

1. Navigate to the gifts view of CRM by (1) clicking the main navigation menu, (2) clicking **Development**, and finally (3) clicking **Gifts** under Gift Processing.

2. Click **New** in the actions menu. The gift entry view opens.

3. Enter information into the following fields under Gift Information.

   - Constituent

   - Gift Type = Gift

   - Gift Amount

- Batch
- Date Received
- Source = Terminal

4. Under Appeal Information, enter an appeal code.
5. Select the credit card type as the payment method under Gift.

Card number starts with	Credit card type
3	American Express
4	Visa
5	Mastercard
6	Discover

6. Under Payment Details, enter the first digit and last 4 digit of the credit card number as the Card Reference No.
7. Add comments under Acknowledgement/Comments for future reference.
8. Click **SAVE** to create the gift record.

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Add premiums to the pledge

There should be premiums listed on the pledge form. Add each premium separately onto the pledge.

1. Navigate to the Premiums view of CRM by clicking the downward arrow next to the constituent’s name and clicking **Premiums**.
2. Open the premium entry view by clicking ADD NEW PREMIUM.
3. Search for the desired premium under Inventory.
4. Change the Premium Status to Approved.
5. Click **SAVE & CLOSE.**

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Prepare receipt

1. Black out the credit card number on the pledge form.
2. Write the appeal code on the credit card receipt.
3. Scan both the pledge form and the credit card receipt to your email.

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Close batch

1. Save a copy of the receipt under the correct month in Gift Processing Batches on the network share using the following naming convention:
    - Process date_GPBatch_Terminal_batch ID. (i.e. 20151015_GPBatch_Terminal_1)
2. Open the batch record in CRM, attach a copy of the receipt and leave detailed notes for future reference.
3. Under Batch Information, change the ready to close field from *No* to *Yes* and change the batch status field from *Open* to *Closed*.
4. Click **SAVE & CLOSE.**

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