



# CAMPAIGN MANAGEMENT VOLUNTEER INCENTIVES CONFIGURATION

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## Introduction

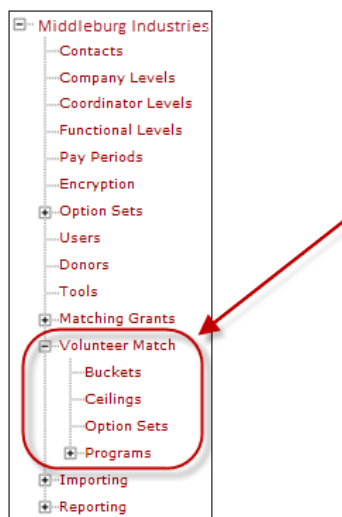
The Volunteer Incentives in Campaign Management enhancement allows users to log and submit hours volunteered to be approved for corporate match. With Volunteer Incentives, campaign administrators can set match rules, including minimum hours, rate per hour, exclusions, and ceilings. Volunteer Incentives is only available for IPE campaigns and cannot be used for strictly logging hours.

The basic steps for configuring Volunteer Incentives in Campaign Management are as followed:

1. Create a Bucket
2. Create Program Ceilings (Optional)
3. Configure a Volunteer Incentives Program
4. Activate Volunteer Incentives Program
5. Create a Volunteer Incentives Option Set
6. Link Volunteer Incentives Program to Donor Site
7. Associate the Volunteer Incentives Option Set to the Campaign
8. Customize Volunteer Incentives Content

Steps 1–6 are configured in the Volunteer Incentives section of the CM Company level. To access the Volunteer Incentives section of CM, take the following steps:

1. Log in to Campaign Management and navigate to the left navigation tree. Select the  **Companies** node and select to expand a company.
2. Expand the **Volunteer Match** node.



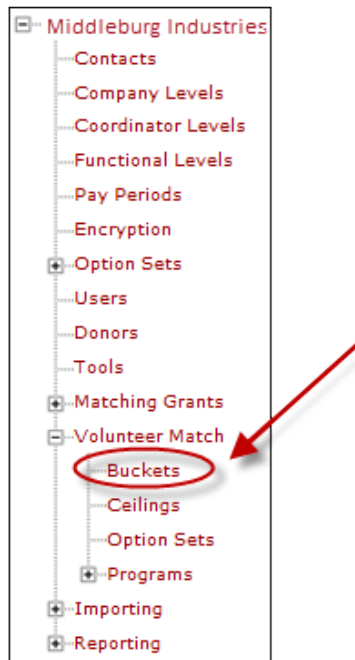


Once you have accessed this area, you can follow the step-by-step instructions provided in the sections below for completing each of the above set up steps.

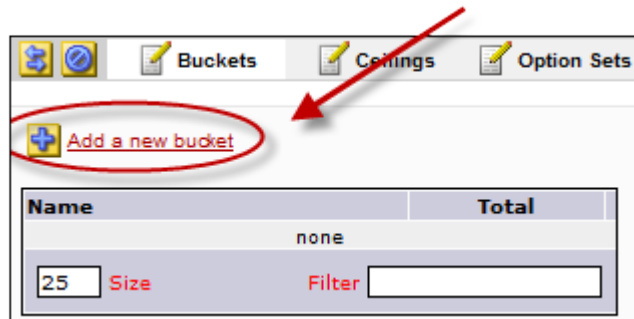
### Create a Bucket

Buckets define the total volunteer match available for distribution. At least one bucket must be created for each company – even if the company has not identified a total volunteer match funding amount. Once created, a bucket can be associated to one or more Volunteer Incentives Programs.

1. Click “Buckets” from the **Volunteer Match** node on the navigation tree.



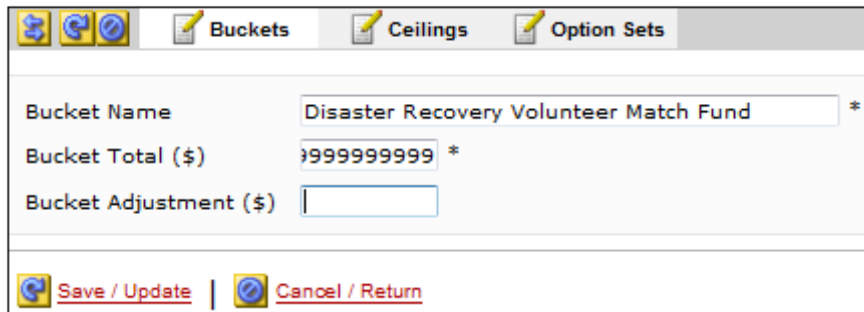
2. Click the “Add a new bucket” link.





- Fill in the fields provided to define the bucket. Then click “Save/Update” to save your changes.

Bucket Fields		
Req	Field	Description
*	Bucket Name	This is the name that will be used to identify the bucket throughout the system.
*	Bucket Total	This is the maximum available volunteer match funds for the bucket – <i>enter the dollar value into the text box. Do not include any commas or current symbols.</i>  <b>Note:</b> Because this is a required field, a value must be entered. If the company does not have a defined volunteer match funds bucket, enter “9999999999” (as many 9s as the system will allow).
	Bucket Adjustment	Allows you to adjust the total dollars available for users of the online system by either a positive or negative number.



- Repeat steps 2 & 3 to create additional buckets.

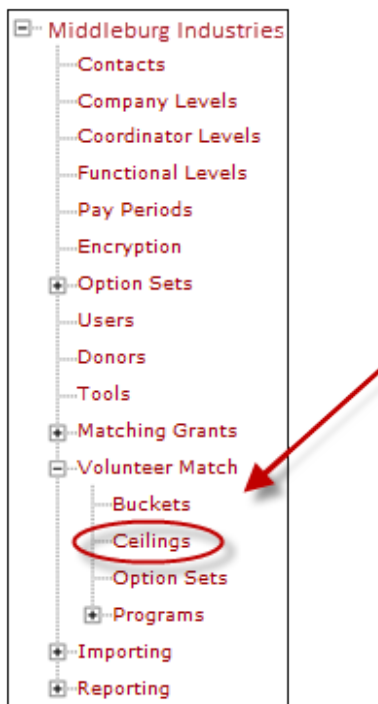


### Create Program Ceilings (Optional)

Ceilings define the maximum volunteer match funds that will be allocated in a program. Ceilings can be set as “General” (max for all requests) or “Donor” (max for all requests made by an individual donor). Ceilings can be established for a single Volunteer Incentives Program or to multiple programs. If the company has multiple programs across which a ceiling is to be applied, Company level ceilings can be created and applied across multiple programs as part of the Volunteer Incentives Option Set.

Creating ceilings is an optional feature that allows for complex Volunteer Incentives Programs. Skip this step if cross-program ceilings are not needed for a particular company.

1. Click “Ceilings” from the **Volunteer Match** node on the navigation tree.



2. Click the “Add a new ceiling” link.



- Fill in the fields provided to define the ceiling. Then click “Save/Update” to save your changes.

Ceiling Fields		
Req	Field	Description
*	Ceiling Type	Establishes whether the ceiling will be applied to volunteer match transactions from all donors or only for each specific donor – <i>select ‘General’ or ‘Donor’ from the drop-down list.</i>
*	Ceiling Name	This is the name that will be used to identify the ceiling throughout the system.
*	Ceiling Total	This is the maximum funds that will be allocated across volunteer match programs associated with this ceiling – <i>enter the dollar value into the text box. Do not include any commas or current symbols.</i>
	Ceiling Adjustment	Allows you to adjust the total dollars available for users of the online system by either a positive or negative number.

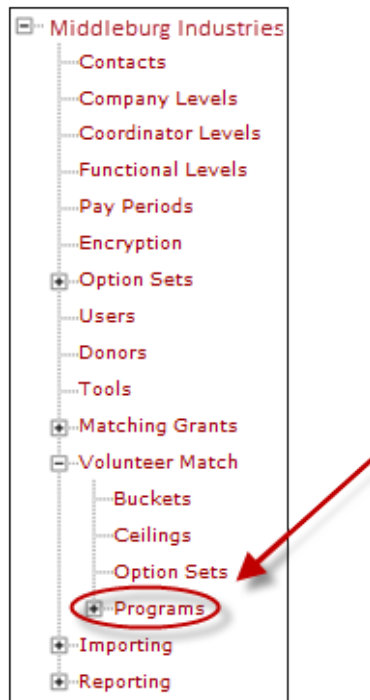
- Repeat steps 2 & 3 to create additional ceilings.



## Create a Volunteer Incentives Program

The Volunteer Incentives Program allows for configuration of the basic Volunteer Incentives Program Rules (minimum donation amount, maximum match grant amount, and match rate), and once established, the Volunteer Incentives Program becomes the hub for volunteer match request tracking and processing.

1. Click "Programs" from the **Volunteer Match** node on the navigation tree.



2. Click the "Add a new Volunteer Incentives Program" link.







- Fill in the fields provided to define the program profile. Then Click “Save/Update” to save your changes.

Matching Program Settings Fields		
Req	Field	Description
*	Program Name	This is the name that will be used to identify the match program throughout the system.  <b>Note:</b> If a company has multiple match programs, it is important that the name be meaningful so the programs can be easily differentiated from one another.
*	Program Code	This is the code that will be used to identify the volunteer match program throughout the system.
*	Bucket	Establishes which funding bucket this match program is associated with.
	Program Ceiling	This is the maximum matching funds available for this program – <i>enter the dollar value into the text box. Do not include any commas or current symbols.</i>  <b>Note:</b> If there is no ceiling leave this field blank.
	Program Ceiling Adjustment	Allows you to adjust the total matching funds available for this program for users of the online system by either a positive or negative number.  <b>Note:</b> Applying a negative adjustment allows the company to reserve a portion of the match funds for match requests submitted offline.
	Donor Ceiling	This is the maximum amount a single donor can receive in matching funds under this program – <i>enter the dollar value into the text box. Do not include any commas or current symbols.</i>  <b>Note:</b> If there is no ceiling leave this field blank.



Program Settings

Program Name: Feb 2013 Midwest Blizzard Cleanup \*

Program Code: 213MW \*

Bucket:  Disaster Recovery Volunteer Match Fund \*

Program Ceiling: 40000

Program Ceiling Adjustment:

Donor Ceiling:

History

Date	User	Event	Comments	State
none				

Save / Update | Cancel / Return

## Content

- a. Click the **Content** tab.

Program Settings

Program Name: Feb 2013 Midwest Blizzard Cleanup \*

Program Code: 213MW \*

Bucket:  Disaster Recovery Volunteer Match Fund \*

Program Ceiling: 40000.00 (current allocation = \$0.00)

Program Ceiling Adjustment:

Donor Ceiling:

History

Date	User	Event	Comments	State
none				

- b. Choose a content area from the dropdown menu and fill in the fields provided.

- **Program Settings** – Controls the content that appears on the donor site to describe the Volunteer Incentives Program.
- **Claim Form** (optional feature) – Customizes the matching gifts claim/verification form to include company specific content and image.



- **Payment Type** – Controls the text that appears to the donor at the top of the volunteer match request details page.

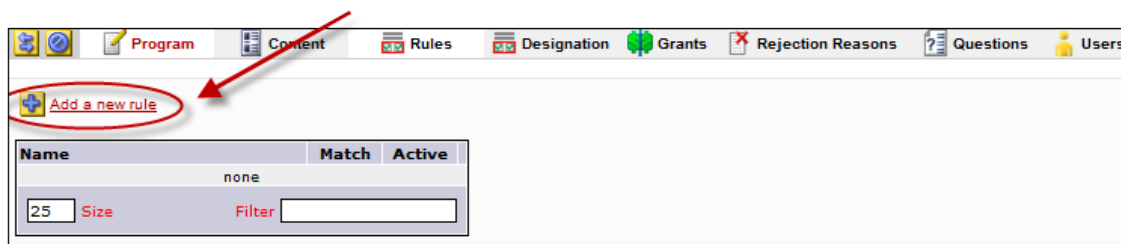
- Click “Save/Update” to save your changes. Then repeat step 5 until all content areas have been filled.

## Rules


- Click the **Rules** tab.




b. Click the “Add a new rule” link.




c. Fill in the fields provided to define the Volunteer Incentives Program Rules.

Matching Rule Fields		
Req	Field	Description
*	Rule Name	This is the name that will be used to identify the volunteer match rule throughout the system.
*	Match Rate	Establishes the rate at which hours will be matched.
	Minimum Designation	Indicates the minimum hours that must be met in order to qualify for designation. <b>Note:</b> Leave blank if there is no minimum amount required.
	Minimum Match	Indicates the minimum hours that must be met in order to qualify for match. <b>Note:</b> Leave blank if there is no minimum grant amount.
*	Active	Indicates if this volunteer match rule is active or inactive. <b>Note:</b> By default the rule is inactive. At least one volunteer match rule must be active in order for the match program to work. Check the box to activate the volunteer match rule.
	Agencies	Denotes which agency(ies) the Volunteer Incentive Rule should be applied to - <i>follow the steps below to configure these:</i> <ul style="list-style-type: none"> <li>• Use the search area to locate the desired agency</li> <li>• Click to highlight the desired agency(ies) in the <b>Search Results</b> box</li> <li>• Click  next to the highlighted agency(ies) to add it to the <b>Selected Agencies</b> box</li> </ul> <b>Note:</b> If no agency is selected the Volunteer Incentives Rule will



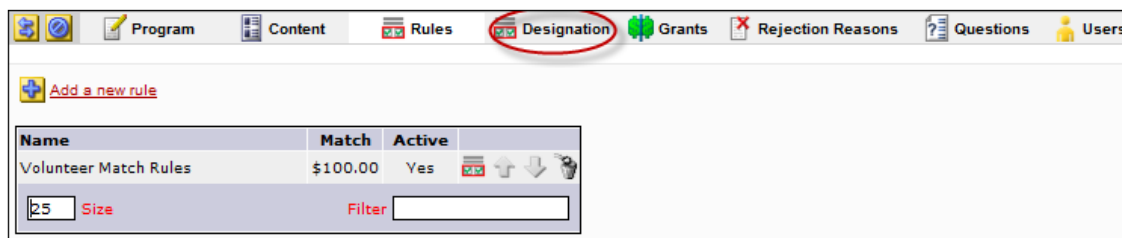
Matching Rule Fields		
Req	Field	Description
		be applied to all agencies.
	Excluded Agencies	<p>Denotes which agency(ies) are ineligible for Volunteer Incentives under this rule - <i>follow the steps below to configure these:</i></p> <ul style="list-style-type: none"> <li>• Use the search area to locate the desired agency</li> <li>• Click to highlight the desired agency(ies) in the <b>Search Results</b> box</li> <li>• Click  next to the highlighted agency(ies) to add it to the <b>Selected Agencies</b> box</li> </ul> <p><b>Note:</b> If no agency is selected, no agencies will be excluded and the Volunteer Incentives Rule will be applied to all agencies.</p>

- d. Click "Save/Update" and repeat steps 8 & 9 to create additional rules, if applicable.
- e. If multiple rules have been configured, use the  next to the rule names to set the order/priority the rules should be applied to a particular volunteer match request.



### Designation

- a. Click the **Designation** tab.

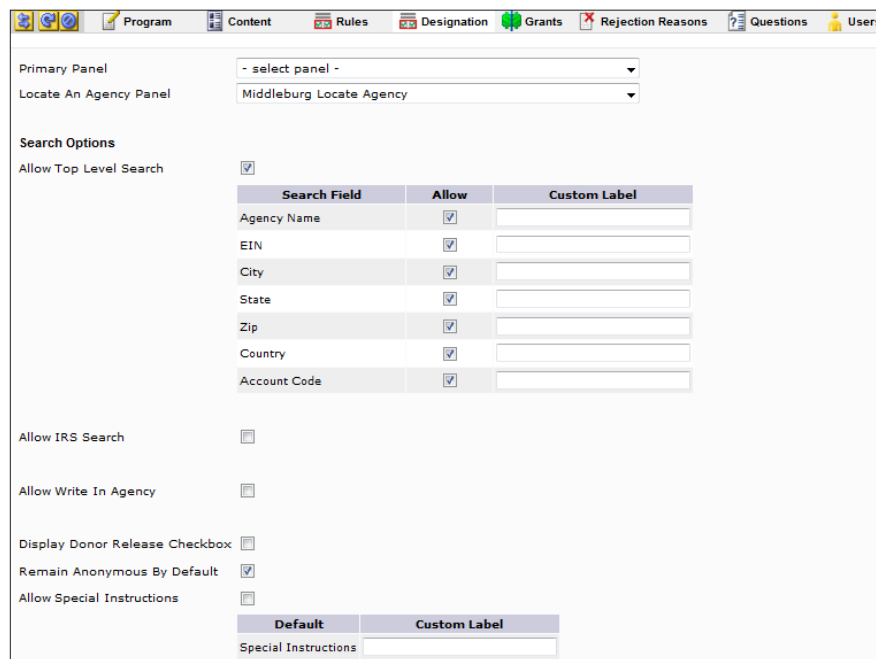


- b. Fill in the fields provided to define the Designation Options.

Designation Fields		
Req	Field	Description
	Primary Panel	Indicates the primary panel that will be available to donors selecting this Volunteer Incentives program.
	Locate An Agency Panel	Indicates the designation panel that will be available to donors selecting this Volunteer Incentives program.
	Allow Top Level Search	Defines whether donors will be able to view the agency search option on primary search page, or if donors will be required to select a panel group before the agency search option will be visible – <i>check the box to activate this feature.</i>  <b>Note:</b> The default is 'Active' (checked).
	Search Fields	Determines which fields will be available as agency search options. Also allows for custom field labels to be established – <i>check the box(es) to indicate which field(s) will be available. If desired, enter a custom field label into the box next to the field name.</i>



Designation Fields		
Req	Field	Description
		<b>Note:</b> By default all fields are 'Active' (checked).
	Allow IRS Search	Defines whether donors will be able to search the IRS database to locate their agency – <i>check the box to activate this feature.</i>  <b>Note:</b> The default is 'Inactive' (unchecked).
	Allow Write In Agency	Defines whether donors will be able to write-in an agency – <i>check the box to activate this feature.</i>  <b>Note:</b> The default is 'Inactive' (unchecked).
	Display Donor Release Checkbox	If checked, donors will have the option to release/not release their information to the nonprofit.
	Remain Anonymous by Default	If checked, the Anonymous box will be checked by default.
	Allow Special Instructions	If checked, donors will have the option to provide special instructions.



Primary Panel: - select panel -

Locate An Agency Panel: Middleburg Locate Agency

**Search Options**

Allow Top Level Search:

Search Field	Allow	Custom Label
Agency Name	<input checked="" type="checkbox"/>	<input type="text"/>
EIN	<input checked="" type="checkbox"/>	<input type="text"/>
City	<input checked="" type="checkbox"/>	<input type="text"/>
State	<input checked="" type="checkbox"/>	<input type="text"/>
Zip	<input checked="" type="checkbox"/>	<input type="text"/>
Country	<input checked="" type="checkbox"/>	<input type="text"/>
Account Code	<input checked="" type="checkbox"/>	<input type="text"/>

Allow IRS Search:

Allow Write In Agency:

Display Donor Release Checkbox:

Remain Anonymous By Default:

Allow Special Instructions:

Default	Custom Label
Special Instructions	<input type="text"/>

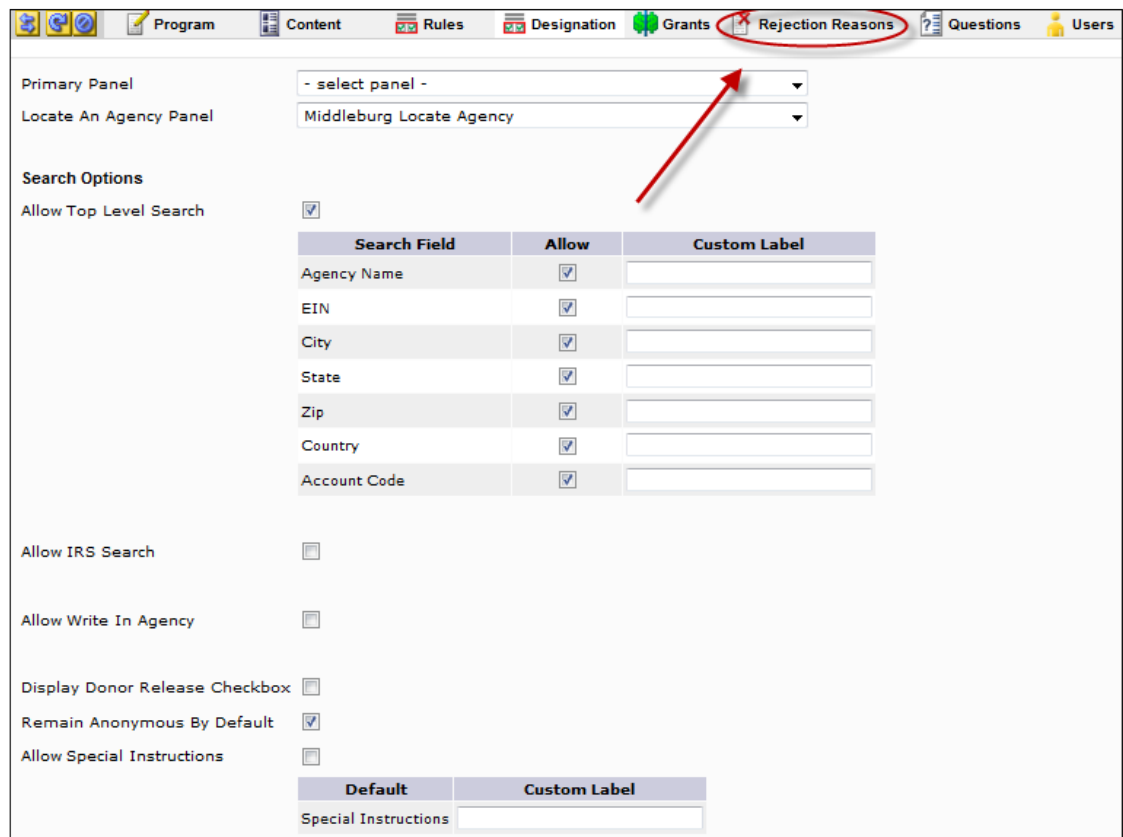
c. Click "Save/Update" to save your changes.



### Rejections (Optional)

Rejection Reasons can be established to allow the Volunteer Incentives Program Administrator to record additional information when a matching grant request is rejected. The creation of Rejection Reasons is optional. **Skip this step if rejection reasons will not be used or if they will be created at a later time.**

- a. Click the **Rejections** tab.



- b. Click the "Add a new Rejection Reason" link.

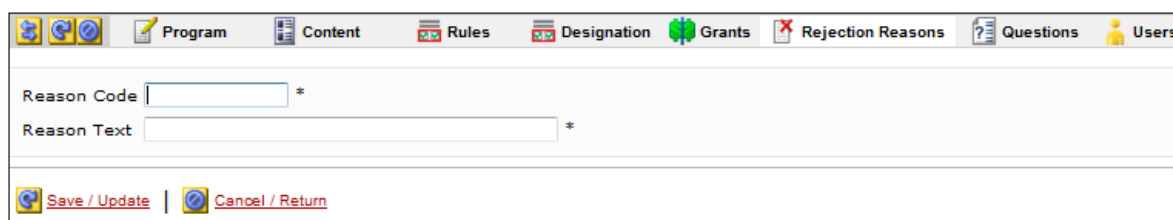







- c. Fill in the fields provided to define the Rejection Reasons.

Match Rejection Reason Fields		
Req	Field	Description
*	Reason Code	This is the code that will be used to identify the rejection reason throughout the system.
*	Reason Name	This is the name that will be used to identify the rejection reason throughout the system.



- d. Click “Save/Update” to save your settings. Repeat steps 20 & 21 to add additional rejection reasons.
- e. If multiple rejection reasons have been configured, use the  next to the reason names to set the order the reasons will appear in the dropdown list on the *Grants Review* page.

### Questions

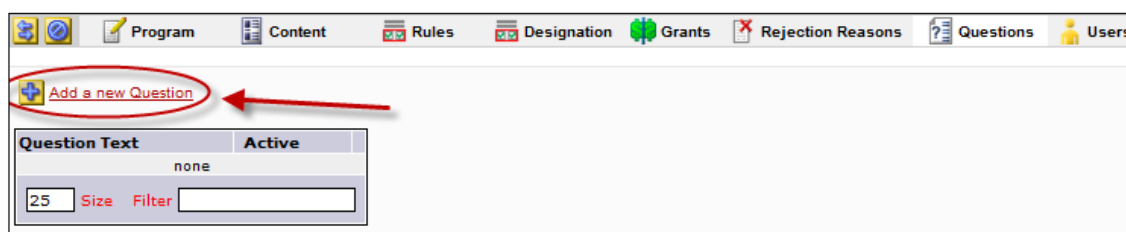
When Volunteer Incentives are used, custom questions can be configured at the Volunteer Incentives Program level. The creation of custom questions is optional. **Skip this step if custom questions will not be used.**

Program level custom questions will appear at the top of the Registration/Donor Details page of the volunteer match request process for all requests made under this program.

- a. Click the **Questions** tab.



b. Click the “Add a new Question” link.



c. Fill in the fields provided to define the Custom Questions.


Custom Question Fields		
Req	Field	Description
	Question Label	This is the label that will be used to identify the question in the Volunteer Incentives Questions Export.
*	Question Text	This is the text that will be displayed to the donor during the volunteer match request process. This text will also be used to identify this question throughout the system.
*	Question Type	Determines whether the response format will be ‘text’ or ‘checkbox’ - <i>select either ‘text’ or ‘checkbox’ from the drop down list.</i>  <b>Note:</b> The default is ‘text.’
	Required	Indicates where the donor will be required to answer this question prior to submitting the grant request – <i>check the box to make required.</i>  <b>Note:</b> The default is ‘unchecked’ (not required).

d. Click “Save/Update” to save your settings.



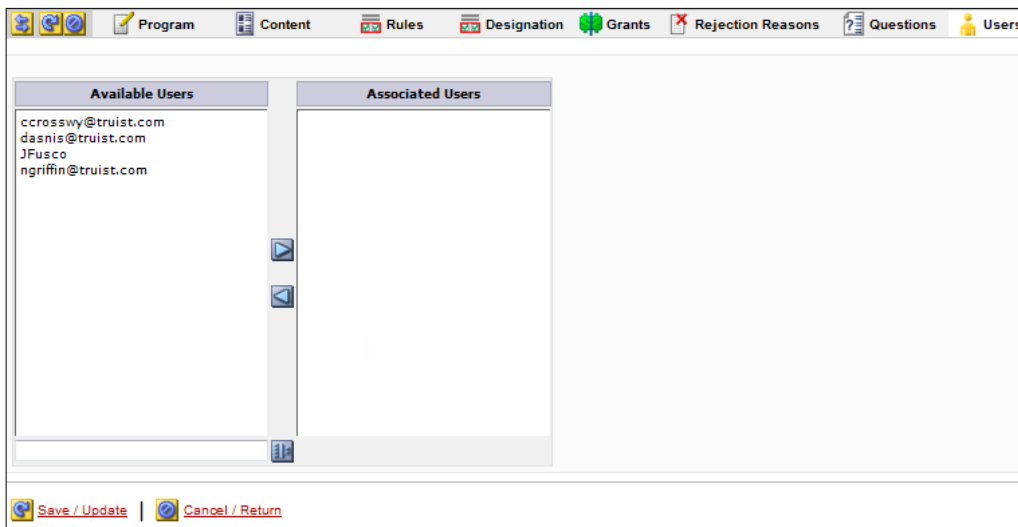
- e. Once created, you will need to activate the question(s). To do this, click the traffic light icon next to the question text. **Note:** An active question will say “Yes” under the Active column next to the question text, and the traffic light icon will appear red.



- f. Repeat steps 26 – 28 to create and activate additional custom questions.
- g. If multiple custom questions have been configured, use the  next to the question text to set the order the questions will appear on the donor site.

### Users

Use this feature to control which administration users can access a particular Volunteer Incentives Program.

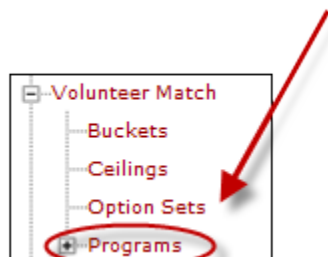




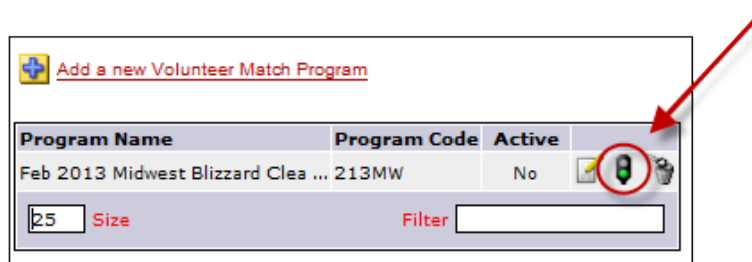
## Activate Volunteer Incentives Program

Once the Volunteer Incentives Program has been set up, it must be activated.

1. Click the **Programs** node on the left navigation tree.



2. Click the traffic light icon next to the Volunteer Incentives Program name. **Note:** An active question will say “Yes” under the Active column next to the question text and the traffic light icon will appear red.



## Create Volunteer Incentives Option Set

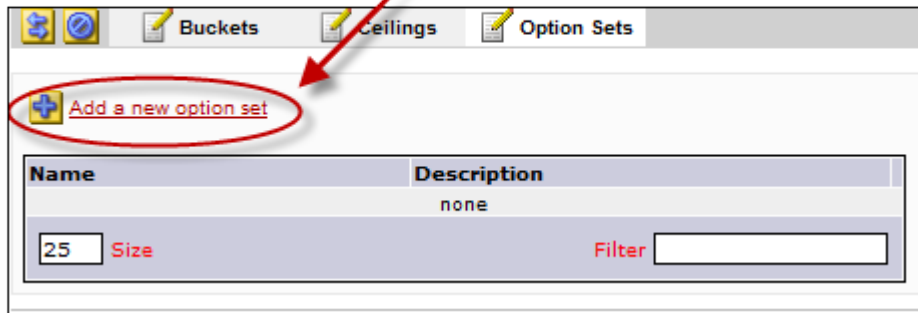
The Volunteer Incentives Option Set ties all the pieces together and establishes the settings that will be used when activating the donor volunteer match request experience. Multiple option sets can be created, allowing you to vary the donor experience at the website, campaign, or donor group level.

1. Click the node from the left navigation tree.





- Click the “Add a new Option Set” link.



- Fill in the fields provided to define the Volunteer Incentives Option Set. Then click “Save/Update” to save your settings.

Option Set Fields		
Req	Field	Description
*	Name	This is the name that will be used to identify the Volunteer Incentives Option Set throughout the system.
	Description	Can use to provide additional details about the option set.
	Enable Claim Form	Indicates whether or not the Claim Form is enabled – <i>check the box to activate this feature.</i>  <b>Note:</b> By default this is ‘inactive’ (unchecked)
	Write-in Mode	Determines which match mode will be used when a donor selects to write-in an agency. ‘Normal’ mode calculates the match amount at the time of the submission; ‘Deferred for Verification’ defers calculation of the match amount until the agency has been verified – <i>select either ‘Normal’ or ‘Deferred for Verification’ from the drop down list.</i>  <b>Note:</b> ‘Normal’ mode is the default. For clients using Dedicated Distribution, the write-in mode <b>must</b> be set to ‘Deferred for Verification.’



**Option Set**

Name: MB Option Set \*

Description: [Empty text area]

Enable Claim Form:

Write-in Mode: Normal

Save / Update | Cancel / Return

4. Link the Volunteer Incentives Program to the Option Set. Click the “Associate a program” link.

**Option Set**

Name: MB Option Set \*

Description: [Empty text area]

Enable Claim Form:

Write-in Mode: Normal




**Programs**

[+ Associate a program](#)

Program	Ceiling	Donor Ceiling
25 Size	none	

5. Fill in the fields provided to associate the program to this option set.



Option Set Program Fields		
Req	Field	Description
*	Program	<p>Indicates the matching grant program you wish to associate with this option set – To do this, follow the steps below:</p> <ul style="list-style-type: none"> <li>• click the  icon to display a list of available Programs</li> <li>• select the program from the list</li> <li>• click the &lt;select&gt; button</li> </ul>
	General Ceiling	<p>Indicates the general ceiling applicable to this program – If applicable, follow the steps below to associate the ceiling:</p> <ul style="list-style-type: none"> <li>• click the  icon to display a list of available General Ceilings</li> <li>• select the program from the list</li> <li>• click the &lt;select&gt; button</li> </ul>
	Donor Ceiling	<p>Indicates the donor ceiling applicable to this program – If applicable, follow the steps below to associate the ceiling:</p> <ul style="list-style-type: none"> <li>• click the  icon to display a list of available Donor Ceilings</li> <li>• select the program from the list</li> <li>• click the &lt;select&gt; button</li> </ul>
	Available Match Template	<p>Indicates the template that will be used to display the available match amount to the donor – <i>edit the text in the box to modify the template.</i></p> <p><b>Note:</b> The default is 'Available Match: %AvailableMatch%'</p>



6. Click "Save/Update" to save your settings.

### Link the Volunteer Incentives Program to Site

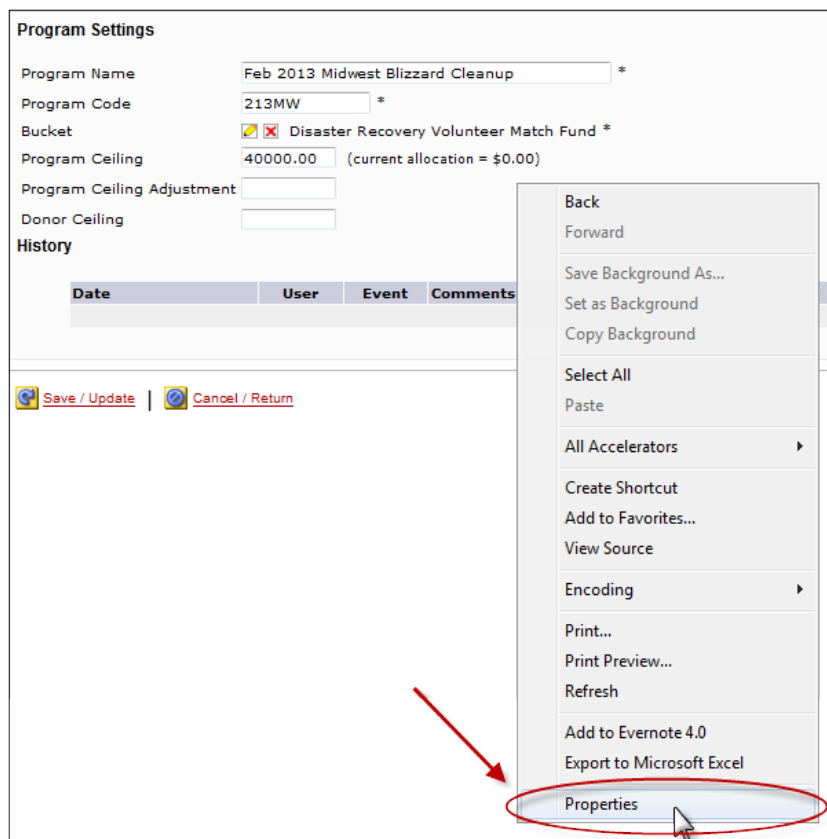
Every year a new program needs to be added to the company in Campaign Management. Additionally, the link to the Volunteer Incentives Program will need to be updated in the skin. To find the new link, take the following steps:

1. Open the Volunteer Incentives Program in OPPS. Expand the Company level > [Company Name] > Volunteer Incentives > Programs > [Program Name].

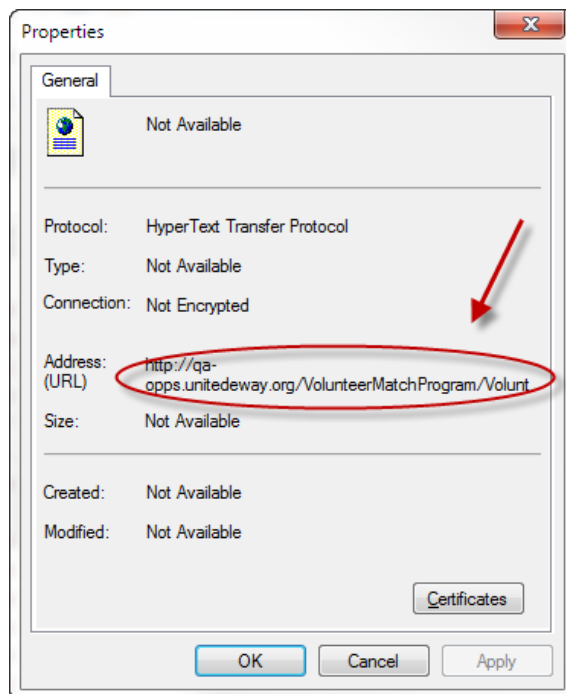




2. Right click somewhere on the *Program* page and select “Properties.”





3. Grab the URL from the *Address* field. Contact FrontStream Development to have this added to the campaign site’s skin.



### Associate the Volunteer Incentives Program Option Set to the Campaign

Once the Volunteer Incentives Program has been created and linked to a Volunteer Incentives Option Set, the option set needs to be associated to the campaign.

1. Navigate and expand  **Campaigns** on the left navigation tree. Find the campaign and click the  node.
2. Find the *Volunteer Incentives Option Set* dropdown menu and select the Volunteer Incentives Option Set created in the steps above.



3. Click the “Save/Update” link to save.
4. A link for “Request Volunteer Match” will display on the campaign site.

### Customize Volunteer Incentives Program Content

The Volunteer Incentives Program content, including the donor review instructions, match review instructions, thank you message, claim form instructions, and program list page instructions can be customized on the campaign’s Website Content.

1. From the Campaign node, open the Website Content.



2. From the Website Content dropdown menu, select “Volunteer Incentives.”



Website Content News Events Users

Truist is not responsible for content uploaded or created by Users to its website, including but not limited to images or ideas. User agrees that the individual who uploaded said content is solely at fault. User agrees to indemnify and save himself from misuse, misconstrual, or inaccuracies of such content.

User agrees to abide by all local, state, federal, or international regulations in regard to content. If any content or product is known to violate these restrictions.

Donor Registration

- CEO Signature Image
- Website Images
- Website Multimedia
- Pledge Bar
- Payment Types
- Designation Panels
- Thank You Message
- Confirmation Page
- Terms and Conditions
- Contribution Review
- View Cart / Checkout
- Donor Review
- Confirmation Emails
- Leadership Level Page
- Leadership Recognition
- Corporate Match Program Page
- Donation History Page
- Contact Us Page
- Survey
- Privacy Policy Page
- Website Custom Page #1
- Website Custom Page #2
- Website Custom Page #3
- Website Custom Page #4
- Website Custom Page #5
- Website Custom Page #6
- Direct Match
- Match Program Summary
- Volunteer Match**
- Resignation Page

3. Fill in the fields provided to define the Volunteer Incentives Program content.



Website Content News Events Users

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User agrees to abide by all local, state, federal, or international regulations in regard to content. If any content know and to obey these restrictions.

Volunteer Match

\* = required

Donor Review Instructions

Match Review Instructions

Thank You Message

Thank You Message Enabled

Claim Form Instructions

Program List Page Instructions

Confirmation Email

Active

Verification Email

Active