UNICEF Canada
Entering Donations using the new Convio Portal

Purpose of this document:
This document outlines the new UNICEF Canada donation processing pages setup for Answers Plus.

Background:
UNICEF Canada has implemented a new online donation processing tool: Convio. New pages have been setup for processing single gifts, as well as providing the opportunity for Answers Plus to input monthly gifts and immediately transact the first payment. Subsequent monthly payments will occur on the same calendar day every month.

1. **Open Convio**

    Go to: http://107.20.155.169/en/article/answer-plus-unicef-donation-pages

    NOTE: YOU MUST CLOSE THE BROWSER BEFORE ENTERING A NEW GIFT IN ORDER TO ENSURE THAT THE INFORMATION FROM THE PREVIOUS ENTRY HAS BEEN REMOVED.

    This will bring you to the launch page for Answers Plus donation templates.
    NOTE: Check the side-bar underneath the "Gallery" image for links to useful information, including this document!

2. **Ask the donor if they will require an e-receipt or a paper receipt. Select the corresponding donation template. Based on Language and receipt type required.**
    For e-receipt: select "With online receipt"
    For paper receipt: select "Without online receipt"
    NOTE: Online e-receipts are more cost-effective for UNICEF Canada. However, we can still send out paper receipts. Due to the additional cost of printing and mailing e-receipts, we do not issue paper receipts for donations less than $25.00 unless requested.

This will take you to the "Gift and Payment Information" form.

3. **Preliminary fields.**
   a) Operator ID – Enter your name in the field (first initial, last name).
   b) Gift Amount – Enter the amount of the donor's gift
   c) Gift Type – Determine whether the donor wants to make a monthly recurring gift or a single non-recurring gift (one-time gift). Select the appropriate button.
   d) Monthly Gift Duration – For monthly gifts, enter the "Monthly Gift Duration" field. Only select the option: "Pick this ONLY(Monthly)". The other option ("60 months") is there by default and cannot be removed from the drop down.
   e) I would like my gift to support – Select one of the pre-set campaigns from the drop down menu.
      NOTE: For monthly donor setups, they can only direct their donation to "Wherever is Needed Most".

Monthly Gift Example

Single Non-Recurring Gift Example (One-time Gift)

4. **Billing Information**

a) Title – Title of the person giving the gift
b) First Name – Donor's first name
c) Last Name – Donor's last name. Please include accents as appropriate.
d) Street 1 / Street 2/City/Postal Code – Donor's complete address including apartment/suite number
e) Province / Country – Choose from a the drop down menu
f) Phone number – donor's phone number of chose (this is the only field that is not required in this section)
g) Determine whether the donation is being made by an individual or an organization. If it is an organization, fill in the "Business or Organization Name" field.
h) Email Address - is a required field, and necessary for sending e-receipts. Please over-write the existing email address with the actual email address for the donor. If the donor does not provide an email address, leave the pre-populated email address in the form (see example below).
i) Determine if the donor would like to receive communications from UNICEF Canada. If not, uncheck the "Yes, I would like to receive communications from this organization" box.

Example: Billing Information

"Wherever is needed most"):

Billing Information

* Title: [dropdown]

* First Name: [_____]

* Last Name: [_____]

* Street 1: [_____]

Street 2: [_____]

* City: [_____]

* Province: [dropdown]

* Postal Code: [_____]

* Country: [Canada ▾]

Donor Phone Number: [_____]

* Email Address: [DEAcallcenter_02442311@unice]

☑ Yes, I would like to receive email communications from UNICEF Canada.

Is this donation on behalf of an Organization or Business? If so please provide the

Business / Organization Name [_____]

Donation Information

5. **Donation Information**
   a) Determine if the donor is calling in response to a UNICEF mailing. If not, select "No" beside *"Are you calling today as a result of a mailing appeal from UNICEF Canada?"* If

so, select "Yes" and advise the donor that in order to better track our mailing effectiveness, we would like them to provide some information from the response coupon.

Example: Donation Information

b) Near the address, there will be a donor ID of six of seven digits. Input this into the "DONOR #" field.
c) Beside the donor ID will be seven or eight digit appeal code, (eg. 11SP1-A, 11TM12-J). Input this into the "SOURCE CODE" field.

Example: Mailing response coupon with donor ID and source code

6. **Tribute Information**

Determine if this donation is meant as a tribute in honour or in memory of someone. If not, skip the "Section Header" section. If so:

a) Honor Gift Type – Determine whether the donation is in honour of someone who is alive, or in memory of someone who has passed.

b) Honoree Name – Input the person who is being honoured or commemorated by this donation in the "Honoree Name" field.

c) Notification Recipient Name – Determine whether the donor will need a notification card sent. If not, proceed to the next section. If so, enter the name of the person being honoured or the next of kin in this field.

d) Notification Recipient Street/City/Province/Postal Code – Enter the mailing address for the Notification Recipient. If the donor would like the card sent to them so that they can hand deliver, put the donor's address in these fields instead.

e) Honor Gift – Message Body – Determine if the donor wishes to include a comment on their notification card. If so, include it in this field.
NOTE: There is a 255 character limit.

Example: *Tribute Information*

Source Code: 11RN1-B

Tribute Information: Complete if donation is In Honor / In Memory of someone.

Honor Gift Type: In Memory of

Honoree Name: Jill Black

Notification Recipient Name: Tom Black

Notification Recipient Street: 321 Main St

Notification Recipient City: Whoville

Notification Recipient Province: SK - Saskatchewan

Notification Recipient Postal Code: S2C 2K1

Honor Gift - Message Body: Our thoughts are with you in this difficult time.

Donor Comments

7. **Donor Comments**

   Enter any messages the donor would like to pass along to UNICEF Canada for review. This will include mail preferences such as Do Not Mail, Do Not Call, Do Not Exchange

   Example: Donor Comments

Donor Comments

Donor Comment: You guys are great!

Payment Information

8. **Payment Information**

Determine the if the donor is paying by credit card or direct withdrawal through their bank account. Select "Credit Card" or "Bank Account Withdrawal" in the "Select a Payment Type" field and the appropriate fields will appear below.

For Credit Card:
a) Credit Card Type – select appropriate card type
b) Credit Card Number – enter the credit card number.
c) CVV Number – enter the 3 digit authorization code from the back of the donor's credit card. This is a mandatory field
d) Expiration Date – expiry month / year

Example: Credit Card Payment Information

For Bank Account Withdrawal:
You will need the transit number, bank number, and back account number. These can be found on the bottom left-hand corner of a cheque.
a) Transit Number: 5 digits
b) Bank Number (aka Institution Number): 3 digits
c) Account Number: usually 7 digits, but sometimes more

Example: Locating transit, institution, and account numbers on a cheque.

Example: Bank Account Withdrawal Payment Information

Payment Information

Select a Payment Type: | Bank Account Withdrawal ▾

Transit Number: | 12345

Bank Number: | 123

Bank Account Number: | #############

Verify Bank Account Number: | #############

Account Type: | ⦿ Chequing
| ○ Savings

☑ By checking this option, I agree to use my bank account as a payment method and authorize this organization to debit my bank account to fulfill my donation commitment.

| Next | | Cancel |

9. Press the "Next" button. You will have the opportunity to review before the donation is processed. If there is an error in a required field, a box with a red "x" will appear beside the field indicating what fields need correcting. Correct the field and press the "Next" button again.
NOTE: monthly donations will process their first instalment immediately, and on the same date for every subsequent month until cancelled.

Example: Error message

10. Once the "Gifts & Payment Information" form has been accepted, the "Review Gift" page will appear with key information. Review with the donor. If there are any changes to make press the "Previous" button to return to the "Gifts & Payments Information" form and make the appropriate correction. Otherwise, Press "Process" to send transaction for processing.

Example: Review Gift page

Transaction Summary

Transaction Date:	27/09/11
* Operator ID	Type your name here
Amount:	$5.00
Frequency:	Monthly
Duration:	Forever
* I would like my gift to support (if Monthly then "Wherever is needed most"):	Wherever is needed most

Billing Information

Title:	Mr.
First Name:	John
Last Name:	Black
Street 1:	123 Main Street
Street 2:	
City:	Whoville
State/Province:	SK
ZIP/Postal Code:	S2S 1C4
Country:	Canada
Donor Phone Number:	
Email Address:	john_black@example.com
Email opt-in:	Yes

Is this donation on behalf of an Organization or Business? If so please provide the

Business / Organization Name

Donation Information

Are you calling today as a result of a mailing appeal from UNICEF?	Yes
Donor #:	999999
Source Code:	11RN1-B

Tribute Information: Complete if donation is In Honor / In Memory of someone.

Honor Gift Type:	In Memory of
Honoree Name:	Jill Black
Notification Recipient Name:	Tom Black
Notification Recipient Street 1:	321 Main St
Notification Recipient City:	Whoville
Notification Recipient Province/State:	SK
Notification Recipient Postal/ZIP Code:	S2C 2K1
Comment	Our thoughts are with you in this difficult time.

Donor Comments

Donor Comment	You guys are great!

Payment Information

Payment type:	Credit Card
Credit Card Number:	···········9741

PREVIOUS　　　**PROCESS**　　Cancel

11. If the transaction is declined by the bank, a notification will appear at the top of the page. Re-verify the information and attempt to process the transaction again.
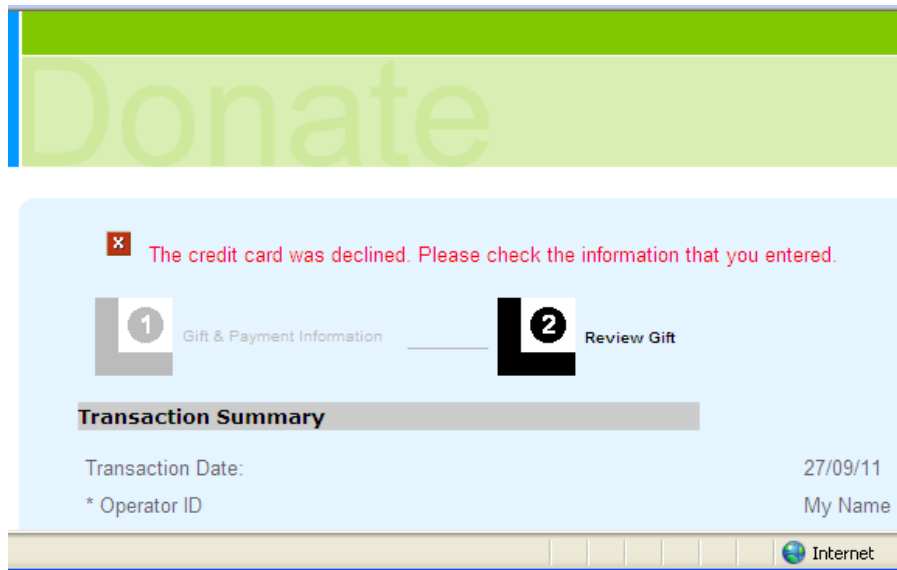
12. If the donation processes successfully, a letter will appear with a transaction summary at the bottom. The letter will be similar, but not identical, to what a donor requesting an e-receipt would receive in their email.

Example: *Successful transaction letter*

Dear John,

Thank you for your donation of $5.00 to UNICEF Canada and your commitment to help the world's children. As a UNICEF supporter, there is no corner of the world that your generosity cannot reach. Working together, we will ensure that more children are fed, cared for and protected from harm than ever before.

Would you like to do some more to help the world's most vulberable? Here are some simple things that you can do to help spread our message:

Share our message on **Facebook**

Follow us on **Twitter** and retweet us

Give a gift with meaning – Give a **UNICEF Survival Gift**

If you would like to stay up to date on how your help is making a difference around the world, make sure to come back and visit **unicef.ca**.

Thank you once again for your ongoing support.

Sincerely,

Dave Spedding
Chief Development Officer
UNICEF Canada

TRANSACTION SUMMARY

Title:	Mr.
First Name:	John
Last Name:	Black
Email:	john_black@example.com
Street:	123 Main Street
City:	Whoville
Province:	SK
Postal Code:	S2S 1C4
Country:	Canada
Gift Amount:	$5.00
Credit Card Number:	————9741
Credit Card Type:	Visa
Expiration Date:	10/2014
Tracking Code:	3881-1362-3-1321-1392

13. Close the page and you're done! For subsequent donations, please be sure to close the convio page and start over from the beginning. This will ensure your browser cookies are cleared and the donor's information is protected.

v-3: Updated 09/30/11 by G. Wade