As part of our commitment to continuously updating and enhancing our fundraising system, we are thrilled to announce our latest enhancements!

What's new in the system?

> **Our latest release includes a new team level and the option for a donor to pay your processing fee!**

1. Corporate Teams

What is a "Corporate Team"? Corporate Teams are "one level" above regular teams, allowing your event to group teams under one umbrella. Event administrators can now easily create and manage Corporate Teams through the Artez administrator console.

The Registrant Experience: Participants registering for an event and creating a team can choose to affiliate themselves with a Corporate Team. Those joining a team will inherit the corporate affiliation chosen by the team captain.

The Role of the Corporate Team Captain: Corporate Team pages can be assigned to a Corporate Team captain who can create a team message, upload images or videos, and specify one or multiple locations for the Corporate Team. Corporate Team captains will have the ability to track the Corporate Team's progress from inside the fundraising hub.

Reporting on Corporate Teams: A new report called "Corporate Team Summary" will provide details about Corporate Teams. Two existing reports have also been updated to capture data on direct donations made to Corporate Teams.

2. Donor Option To Cover A Processing Fee

Administrators can now enable a setting that allows the donor to opt in or out of paying the processing fee for their donation. Individual organizations can set the amount of the processing fee for each donation form.

Where does it appear? The option to cover the processing fee is available for direct and tribute donations, event/campaign pledges, and the purchase template.

How can a charity set a processing fee amount? Administrators can specify a dollar amount, a percentage amount, or a combined amount ($ + %) that will be added to the donation if donor opts in.

How are tax receipts issued? A donor who opts in to also pay the processing fee will receive a tax receipt for the total amount (donation + transaction fee).

How to configure our new features:

Creating A Corporate Team:
Corporate Teams are available for Event/Campaigns that have the Enhanced Fundraising Hub enabled. To create a Corporate Team take the following steps:

1. From the admin console, choose your event.
2. Click on **Registrations** in the left menu.
3. From the Corporate Teams option, click **Add**.
4. Enter a Corporate Team Name (Required).

5. Enter a Description (Optional) for internal purposes only.
6. Specify a Fundraising Goal.
7. Enter a Corporate Team Page Title.
8. Enter a Corporate Team Message. This will be displayed on the Corporate Team page.
9. Assign a Corporate Team Captain (Optional) by searching from participants that have already registered for the event.
10. Specify a Location(s).
11. Click **Submit**.

After choosing Submit, the page will refresh and display the link to the Corporate Team page. You will also have the option to upload images and videos that can be displayed on the Corporate Team page.

Affiliating A Team To A Corporate Team:
- When a new registrant chooses to create a team during registration, a Corporate Team affiliation section will be visible.

- Only Corporate Teams associated to the registrant's chosen location will be visible in the drop down box.
- If an individual chooses to join a team during registration, they will inherit the Corporate Team affiliation defined by the team captain.
- Default content for this section is editable through literals in the admin console (Content > Enhanced Registration > Registration Type Form).
- Post- registration a team captain can change their affiliation by going to the Edit Team Info page within the Fundraising Hub.

How Individuals Can Affiliate To A Corporate Team:
- If a person chooses to register as an individual without joining a team, a new Corporate Team Affiliation section will be visible on the Additional Questions page during registration.

- Only Corporate Teams associated to the registrant's location will be visible in the drop down.
- The default content in this area is editable through the admin console (Content > Enhanced Registration > Additional Information Form).
- Post-registration, an individual can change their Corporate Team affiliation under the Profile menu item in the Fundraising Hub.

The Corporate Team Captain Experience:
If a Team Captain has been assigned to a Corporate Team, they will see a Corporate Team Results page when they log into the Fundraising Hub.

artez*interactive*
friendship powered fundraising™
A FrontStream Company

Corporate Team Progress (Artez Interactive)

Visit Page

Home
Fundraising
Team
Team Results
Recruit Team Members
Email Team
Edit Team Info
Manage Team Sponsors
Manage Team Cash & Cheques
View Recruitment List
Message Board
Team Captain Report
Corporate Team Results
Profile
Registration

Artez Interactive
Omar Arte...

Total Amount Raised:	$275.00
Direct Team Donations Amount:	$0.00
Direct Team Sponsors:	0
Fundraising Goal:	28% of $1,000.00 (change)
Number of Affiliated Teams:	2
Number of Affiliated Individuals:	2
Team Page:	

https://secureqa2012a.artezhq.com/registrant/CorporateTeamFundraisin

15%
12.5%
72.5%
■ Jason Smith

Callout: Link to Corporate Team page.

Callout: Corporate Team fundraising progress section.

Callout: Corporate Team progress visualized in a chart.

Affiliated Teams and Individuals	Goal	Amount
Jason Smith	$0.00	$150.00
Omar's Team	$500.00	$125.00
Omar Echavers	$0.00	$0.00
yaba team (Team)	$300.0	

Callout: List of affiliated teams and individuals displaying how they are progressing against their goal.

Team Page Title
Artez Interactive Corporate Team Page

Team Page Message
Add a personal touch to your fundraising page with a message – this will help motivate your friends to give generously!

B I U I_x No...

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body p

Images and Videos

Add Video   **Add Image**

Callout: Option to edit the Corporate Team page title and message.

Callout: Option to re-order images/videos using drag and drop.

Callout: Option to upload images and videos.

Callout: Area to manage messages posted on the Corporate Team page.

Save Changes Reset

Our Supporters (0)

Type your message here...

How A Corporate Team Page Appears To External Visitors
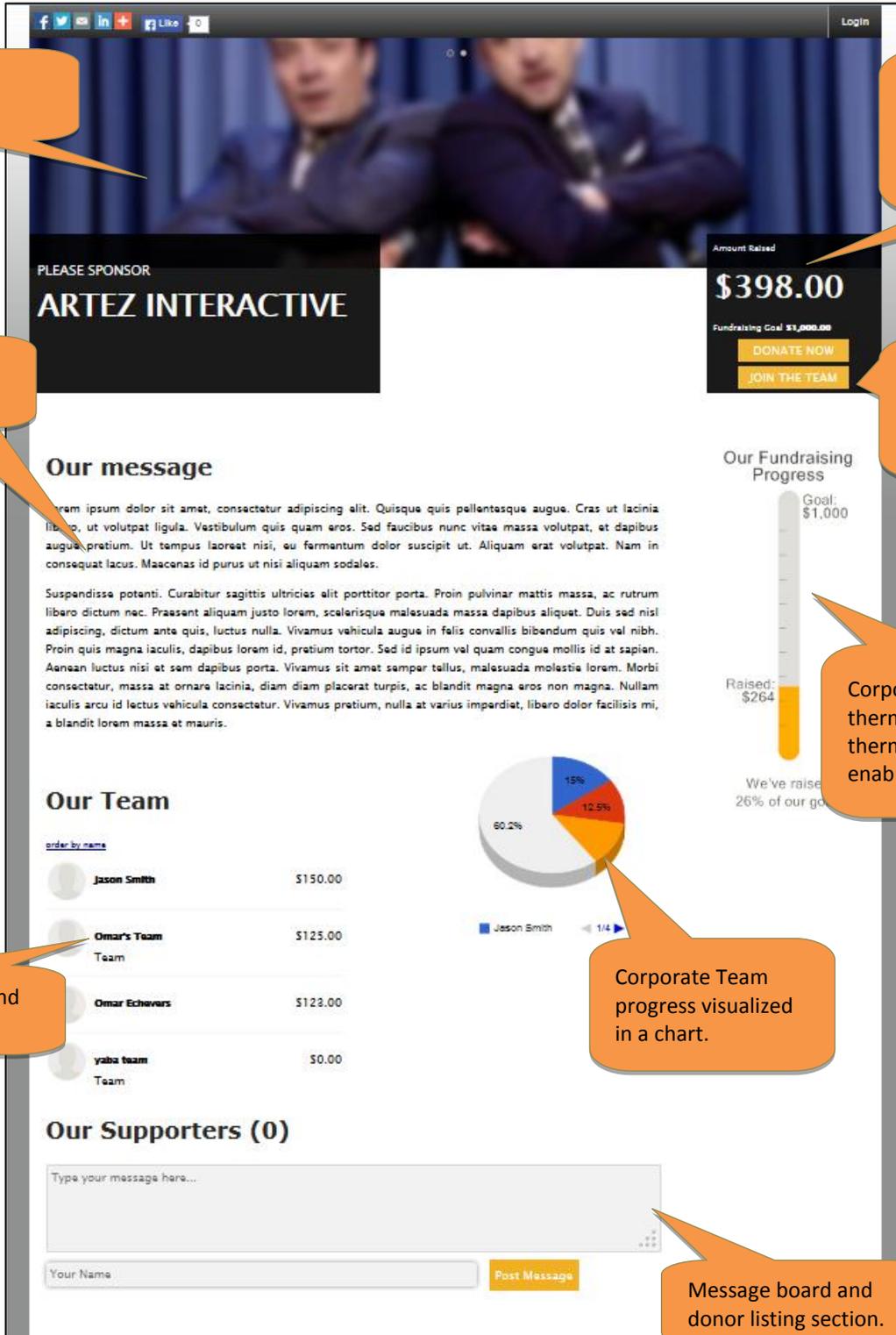
Media Viewer (images/videos).

Funds raised by Corporate Team (includes affiliated teams/individuals).

Corporate Team message.

Option to donate directly to a Corporate Team or join a Corporate Team.

Corporate Team thermometer (if thermometer is enabled).

List of affiliated teams and individuals.

Corporate Team progress visualized in a chart.

Message board and donor listing section.

How To Report On Corporate Teams:

A Corporate Team Report has been created allowing administrators to track Corporate Team performance in an event.

Corporate Team Report	
Event Name:	OETEST
Date You Ran Report:	1/4/2014 04:22 PM
Start Date Of Report Date Range:	1/1/2003
End Date Of Report Date Range:	1/4/2014
Overall Summary (Includes all Corporate teams)	
Total # of Corporate Teams	6
Total Donation Amount:	797.00
Corporate Team Name:	**Coca Cola**
Team Location:	**All Locations**
Corporate Team Captain:	**John Smith**
Corporate Team Page Link:	https://secure.e2rm.com/registrant/TeamPage.aspx?EventID=108927&LangPref=en-CA&TeamID=355964
Number of Confirmed Affiliated Teams:	*1*
Number of Pending Affiliated Teams:	*0*
Number of Affiliated Teams:	**1**
Number of Confirmed Affiliated Individuals:	*1*
Number of Pending Affiliated Individuals:	*0*
Number of Affiliated Individuals:	**1**
Corporate Team Direct Donation Amount:	20.00
Affiliated Team Verified Donation Amount:	20.00
Affiliated Team Unverified Donation Amount:	110.00
Affiliated Individual Verified Donation Amount:	20.00
Affiliated Individual Unverified Donation Amount:	10.00

In addition to the Corporate Team Report, the following existing reports have been updated to capture Corporate Team information.

Donation Details Report:

- The "Solicited Donation" column will now populate with "Corporate Team" if the gift is a direct Corporate Team donation.
- A new "Corporate Team Name" column has been added.
    - o This column will display the Corporate Team name if the donation was made directly to a Corporate Team.

Registration Details Report:
- A new "Corporate Team Name" column has been added.
    - o This column will be populated if the individual or team on the record is affiliated with a Corporate Team.

Understanding Corporate Team Business Rules

We have compiled a list of important rules/logic that should be noted when working with Corporate Teams.

- A participant cannot be a Corporate Team captain for multiple Corporate Teams.

- A participant can be a Corporate Team captain AND an individual registrant, a member of a team, or a Team Captain.
- The Split Team Donation feature is not supported for donations made directly to a Corporate Team.

Enabling the "Donor Covers The Processing Fee" Option

1. From the admin console, choose an event and then click on **Event Settings**.
2. Within the Donation section, select the **Allow donor to cover the processing fee** checkbox.

Event Settings

Event Home Page: https://secureqa2012a.artezhq.com/registrant/startup.aspx?eventid=23961

General

☑ Set opted-in as the default for: Registrant email permission
☑ Set opted-in as the default for: Donor email permission
☑ Set opted-in as the default for: Registrant post mail permission
☑ Set opted-in as the default for: Donor post mail permission
☑ Set opted-in as the default for: Registrant search consent permission
☑ Display the Event Information (within fundraising section)
☑ Enable Participant Message Board
☑ Enable Personalized Page Name (for Personal and Team Page)
☐ Enable QAS Address Validation
☑ Enable Direct Donation

Donation

☑ Allow for donations made by an Organization
☑ Allow donor to cover the processing fee

[   ] % of donated amount

[   ] Amount to be added to the donated amount

☑ Enable Tax Receipts for Organization Donations
☐ Enable Tax Receipts by Location (ie: set up a unique receipt per location)

3. You now have the option to specify a percentage that will be added to the donation (if the donor opts in) or a set dollar amount. You can also specify a value in both fields for a combined value.
4. Choose **Submit**.

The Donor Experience With "Donor Covers The Processing Fee" Enabled:

When this option is enabled on a donation form, a checkbox will be visible on the donation page under the donation amount field. If the donor selects this option, the associated processing fee will be added to the donation amount.

After the donor enters their gift value in the donation amount field, the processing fee amount is automatically calculated and displayed to the user so they may preview the additional cost.

On the Donation Summary page, the donor is presented with the total amount that will be charged to their credit card or PayPal account.

Update To Thank You Emails:
With the addition of the option for donors to cover a processing fee, we have updated the default content in the following emails:

- Thank You – Solicited Donation
- Thank You – Unsolicited Donation
- Thank You – Team Donation

These emails now have a donation summary section with two new keywords: %ProcessingFeeAmount% and %DonationTotal%.
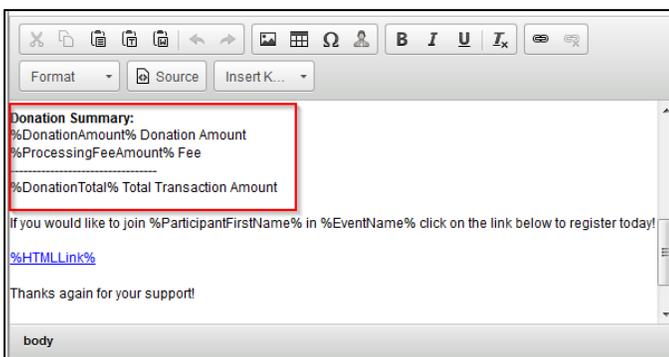
How To Report On The 'Donor Covers Processing Fee' Option:
Two of our existing reports have been updated to reflect this new payment feature.

Reconciliation Report

- A new "Processing Fee Amount" column has been added.
  - The column will populate with the processing fee amount if a donor has opted in to pay it.
- A new "Total Transaction Amount" column has been added.
  - This column will display the combined donation and processing fee amount.

Donation Details Report

- A new "Processing Fee Amount" column has been added.
  - The column will populate with the processing fee amount if a donor has opted in to pay it.
- A new "Total Transaction Amount" column has been added.
  - This column will display the combined donation and processing fee amount .

Examining A Donor Record For A Donor Who Has Covered The Processing Fee:
The donation summary section for a donor record in the Relationships tab now includes processing fee amount data.