October 2015 – Release Notes

As part of our commitment to continuously update and enhance our Fundraising system, we have recently made the following enhancements to the Frontstream Fundraising Pro platform.

Enforce Minimum Fundraising Amount   API Updates   Minor Enhancements
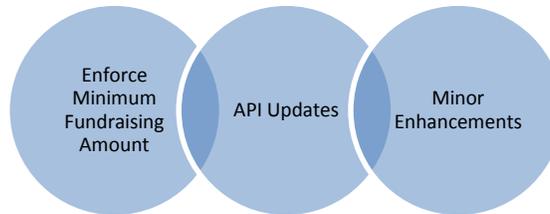
Enforce Minimum Fundraising Amount

For clients that use the Frontstream Gateway (ArgoFire) we have added the ability for fundraisers to opt-in to raise an NPO defined fundraising minimum. When the fundraiser agrees to the events fundraising minimum, they authorize the charity to charge their credit card if they fail to reach the fundraising minimum.

Enabling Minimum Fundraising Amount

Available for Event/Campaigns that use the ArgoFire gateway, to enable the fundraising minimum:

1. From the administrator console, go to the Event/Campaign.
2. Click on **Registrations**.
3. Select the individual registration type you want to enable the minimum fundraising amount.
4. Click on **Business Rules**.
5. Place a check mark next to **Minimum Fundraising Amount** and enter the amount you want fundraisers to agree to.

6. Click **Submit**.

Note: Minimum Fundraising Amount is only visible when the Frontstream gateway is configured for the event. If you don't see the option to enable Minimum Fundraising Amount it is likely due to the event being configured to use another gateway.

Agreeing to the Minimum Fundraising Amount

When Minimum Fundraising Amount is enabled for a registration type, the registrant will need to agree to meeting the minimum fundraising amount and therefore a credit card number will be collected even when there are no other payments. Let's review the following scenario where we have enabled the minimum fundraising amount for a registration type.

When the fundraiser goes through the registration process they will need to agree to raise the amount specified as shown in the image below.

Registration Type

Choose how you will be participating in this event, and what type of registration you prefer.

[Register as an Individual]   [Join a Team]   [Create a Team]

REGISTRATION TYPES INDIVIDUAL

	Title	Fee	Description	Long Description
⦿	Minimum Only		$100 Minimum	This registration type has a minimum fundraising amount.
	☐ I agree to raise $100.00 for this event. If I do not reach the fundraising minimum, I authorize The Artezian Foundation to charge my credit card for the difference.			

Upon agreeing to the minimum fundraising amount, they will continue through the registration process. On the payment page they will be asked for their credit card information. At this time, the credit card won't be charged, we are simply storing a token that will be used later to charge the registrant if they fail to reach the minimum.

Payment Information

* denotes required information

PAYMENT

* Credit Card Type:

[Please select ▼]

* Credit Card Number:

[   ]

* Card Holder Name:

[   ]

* Expiry Month:

[Please select ▼]

* Expiry Year:

[Please select ▼]

You have agreed to raise $100.00 for this event. If you fail to raise the fundraising minimum, you have authorized The Artezian Foundation to charge the difference to your credit card.

At this time, your credit card will not be charged.

Charging Registrants that have failed to reach the Fundraising Minimum

To view a list registrants that have failed to reach the minimum:

1. From the administrator console, go to the Event/Campaign.
2. Click on **Registrations**.
3. Select the registration type that has the fundraising minimum enabled.
4. Click on **Pending Registrations**.
5. On this page you will be able to see who has yet to meet the fundraising minimum.
6. To charge a registrant(s), select one or multiple registrants that you would like to charge.
7. Once you have selected the registrant(s) select whether you would like to charge them for the shortfall, the registration fee (if the registration type has a fee) or a defined amount.
8. Once you have made your selection, click on the **Charge Selected Registrants** button.

General
Business Rules
Locations
Pending Registrations

Frontstream Walk
Registration Type - Individual: Minimum Only

List of registrant that have not meet the minimun fundraising amount

Registrants

Search by First Name or Last Name   Fundraising Minimum Not Met | Card has not been charged ▾

☑	First Name	Last Name	Email Address	Amount Raised	Shortfall	Reg Fee	Payment Status
☑	Matt	Copeland	test@test.com	$0.00	$100.00	$0.00	Pending
☑	Gerald	Smith	oechevers@artez.com	$0.00	$100.00	$0.00	Pending

Please Select one of the following options:

◉ Charge the shortfall amount
◯ Charge the registration fee amount
◯ Charge a custom amount

[Charge Selected Registrants]

9. A confirmation box will then pop-up summarizing the charges that you are about to make. Click **OK** to continue.
10. At this point the registrants will be charged and upon completion, you will receive a summary.

Registrants to be Charged   ✖

First Name	Last Name	Email Address	Amount	Payment Status
Matt	Copeland	test@test.com	$100.00	Succeeded
Gerald	Smith	test@test.com	$100.00	Succeeded

[Ok]

11. At this point an email will go out (if enabled) to the fundraiser letting them know that their credit card has been charged.

Credit Card has been Charged Email

We have created a new "Credit Card Charged - Minimum Fundraising Amount not met" email that is sent to registrants when their credit card has been successfully charged. To enable the email:

1. From the administrator console, go to the Event/Campaign.
2. Click on **Emails**.
3. Place a check mark next to **Credit Card Charged - Minimum Fundraising Amount not met**.

Update to Snapshot, Registration Detail and Registration Summary Report

We have updated the Snapshot, Registration Detail and Registration Summary reports so you can see who has been charged.

Snapshot Report

- The following column has been added to the Snapshot Report
    - Fundraising Minimum Not Met- Amount Charged - For transaction type "Registration" A value is populated if the participant failed to reach the fundraising minimum and they we charged an amount. The amount they were charged would the value displayed.

Registration Summary Report

A new section has been added to the Registration Summary report called **Fundraising Minimum Not Met**. A value is populated next to "Total Amount Charged" if the charity has charged fundraisers who have not met the fundraising minimum. The amount is a sum of all successful charges.

Registration Detail Report

- The following column has been added to the Registration Details report as an available column.
    - Fundraising Minimum Not Met- Amount Charged – A value is populated if the participant failed to reach the fundraising minimum and they we charged an amount. The amount they were charged would the value displayed.

API Updates

We have made a couple of additions to the Fundraising Pro event API.

Scoreboard Consent (POST Registrations)

You can now pass an optional parameter in the POST Registrations method that allows you to set the individuals scoreboard consent. A value of True is passed if scoreboard access is allowed.

```
{
  "Username": "jmcqueen",
  "ConstituentID": 12341,
  "Password": "qwerty",
  "LocationID": 28281,
  "RegistrationTypeID": 1388,
  "TeamID": 4811,
  "CorporateTeamId": null,
  "SearchConsent": false,
```

```
    "ScoreboardConsent": false,
    "UdfResponses": [
      {
        "AnswerID": 3,
        "Value": "Blue"
      },
      {
        "AnswerID": 112,
        "Value": null
      }
    ],
    "VanityUrl": null,
    "WaiveRegistrationFee": false,
    "TransactionID": 0
}
```

Corporate Teams (GET CorporateTeams)

Similar to the GET Teams method, we have created a GET CorporateTeams?EventID={EventID} method. When an Event ID is passed, the method will return a list of enabled Corporate Teams for the event.

```
[
  {
    "CorporateTeamID": 1,
    "CorporateTeamName": "sample string 2",
    "Locations": [
      {
        "LocationID": 1,
        "Name": "sample string 2"
      },
      {
        "LocationID": 1,
        "Name": "sample string 2"
      }
    ],
    "CorporateTeamCaptainFirstName": "sample string 3",
    "CorporateTeamCaptainLastName": "sample string 4"
  }
]
```

We have also updated the POST Registrations method to accept an optional CorporateTeamId parameter. When a valid CorporateTeamId is passed, the individual will be affiliated with the Corporate Team.

Minor Enhancements

In addition to the new features, we have also made the following minor enhancements:

Middle Initial Field on Mobile Donation Page

We have added the ability to capture a middle initial on the Mobile donation page. To enable the middle initial field, follow the steps below:

1. From the administrator console, go to the Event/Campaign or Direct Donation event.
2. From the left menu options, click on **Content**, then click on **Mobile Donation & Search** and then click on **Enter Information/Payment**.
3. On the page that opens up, click on **Edit Content**.
4. Place a check mark in the next to **Show Middle Initial field**.
5. Click **Submit**.

Once you have enabled the middle initial field it will be visible on the mobile donation page.