CRM 2015

GIFT AID & DONATIONS SETUP

USER GUIDE

green4 SOLUTIONS

THE QUEEN'S AWARDS FOR ENTERPRISE: 2014

CONTENTS

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for Go's Gift Aid & Donations functionality.

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DOCUMENT CONTROL

Version	Date	Change	Initials
V1.0		This is a new document	JW

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INTRODUCTION

Go provides the ability for a system administrator to set up a Gift Aid process and create Donation type Bookable Products. The Gift Aid and Donation management module from Go makes a previously complicated procedure simple so that organisations can increase their Gift Aid Claims whilst improving the overall customer experience.

GIFT AID AND DONATIONS

GIFT AID & DONATIONS

GIFT AID

Go offers registered charities and Community Amateur Sports Clubs' as well as any other eligible organisations the ability to collect Gift Aid against specific products and donations.

A charity and fund can easily be set up within CRM, whilst the products' that Gift Aid are applicable to can also be flagged.

A Declaration must be created to comply with HMRC legislation. In addition to the creation of these declarations there is also the facility to maintain and submit them. This process all takes place within the centrally located CRM system.

DONATIONS

Go has provided two mechanisms that enable a charity to take donation payments.

Firstly, Go makes it possible to set-up Bookable Products which automatically allow a customer to enter their own donation amount or alternatively purchase a product in which the entire cost is donated.

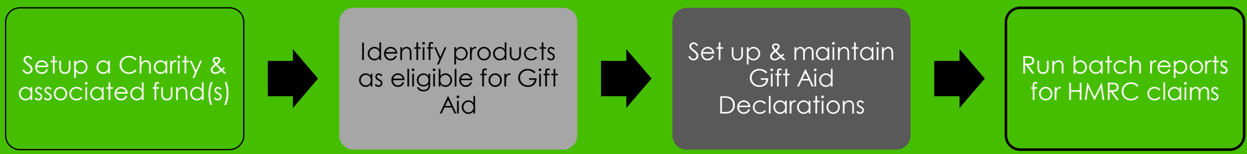
Secondly, donations can be enabled via the use of the shopping basket donation process. This gives multiple options for a customer to donate when finalising their bookings.

Note: This document provides instructions on how to set up Gift Aid and Donation type products in CRM. For instructions on the functioning of the Gift Aid in the POS see the Green 4 Ticketing EPOS User Guide.

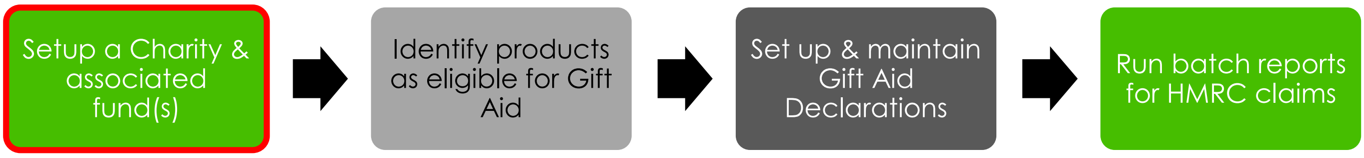
1. COLLECTING GIFT AID

Registered Charities and Community Amateur Sports Clubs are eligible to collect Gift Aid against donations made or specific products purchased. Go has provided the mechanism for an organisation to set up a Charity and associated funds whilst also identifying products that are eligible for Gift Aid. When these products are purchased, the end customer is provided with an opportunity to make a Gift Aid donation and to be compliant with HMRC legislation this requires a declaration from the customer. The Green 4 solution provides this mechanism for taking and maintaining these declarations from all end customers, along with the facility to run batch reports to submit claims to HMRC.

The steps below outline the Gift Aid process that can be set up and maintained in the Green 4 Ticketing solution.



STEP 1. SETTING UP A CHARITY AND ASSOCIATED FUND(S)

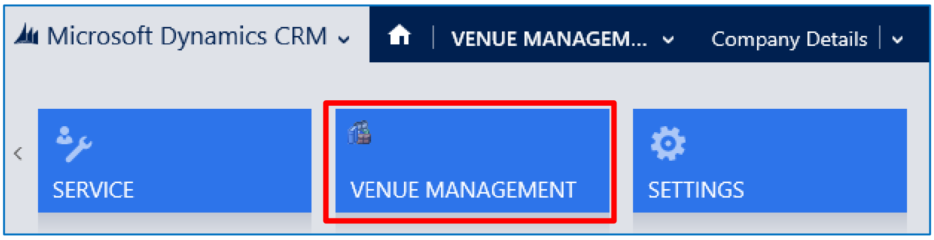


Gift Aid donations are collected against a registered Charity and associated fund or funds. An organisation can only be associated with one Charity.

SETTING UP A CHARITY

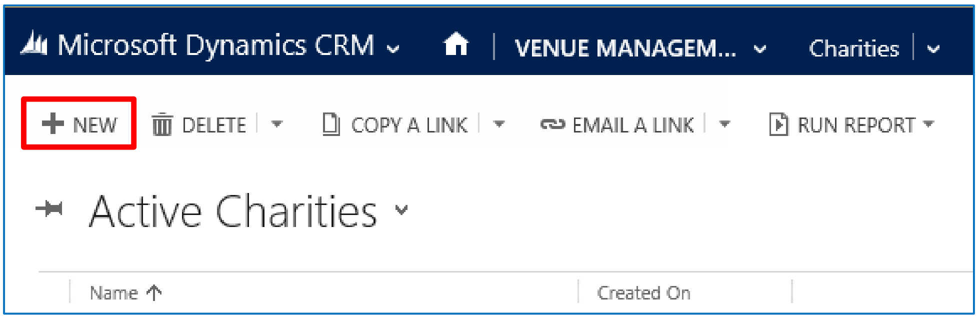
To set up a Charity carry out the following steps:

a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.

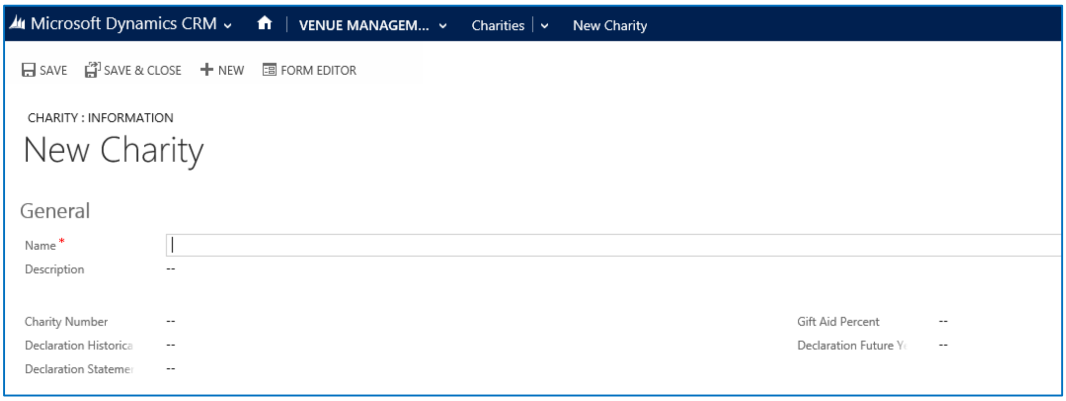


b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Charities.**

c) The Active Charities view will be displayed, select **New** in the ribbon.



d) A new Charity form will be displayed. Complete the following details.



- **Name.** Enter the name of the Charity.
- **Description.** A short description of the Charity can be entered here.
- **Charity Number.** Capture the official Charity number.
- **Declaration Historical Years.** Enter the number of years, from the date of a declaration, that the charity can historically claim Gift Aid relief on.

  When creating a declaration, the customer will be prompted to indicate if they would like to make their declaration apply to historical donations for the number of years entered here.

- **Declaration Statement.** The text captured here will appear on the user interface (POS or Web) when creating a declaration. The end customer must confirm that they have understood this statement by checking a box which creates the Gift Aid declaration that is stored in the system against the end customer's contact record. The text recommended as per the HMRC site is as follows (as of May 2015):

  "I Confirm I have paid or will pay an amount of Income Tax and/or Capital Gains Tax for each tax year (6th April to 5th April) that is at least equal to the amount of tax that all the charities that I donate to will reclaim on my gifts for that tax year. I understand that other taxes such as VAT and Council Tax do not qualify"

  Depending on how the **Declaration Historical Years** and **Declaration Future Years** fields have been populated, the following additional text will be provided when these options are selected by the end customer:

  Declaration Historical Years *– I understand the Charity will reclaim 25p of tax on every £1 that I give on or after 05/10/2010 until 05/10/2014*

  Declaration Future Years - *I understand the Charity will reclaim 25p of tax on every £1 that I give on or after 05/10/2010 until I notify you otherwise*

Note: The wording of the above messages for Historic and Future selections is automated with the percentage amounts (e.g. 25p above) and dates being populated from entries made in the set up.

- **Gift Aid Percent.** Capture the percentage used to calculate the amount of Gift Aid a charity can currently claim back from HMRC.
- **Declaration Future Years.** Enter the number of years, from the date of a declaration, that a charity can claim future donation gift aid relief on.

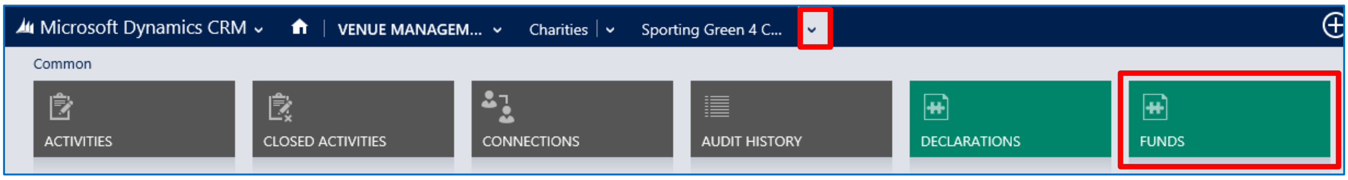
  When creating a declaration, the end customer will be prompted to indicate if they want to make their declaration apply to future donations for the number of years entered here.

ASSOCIATING FUNDS TO THE CHARITY

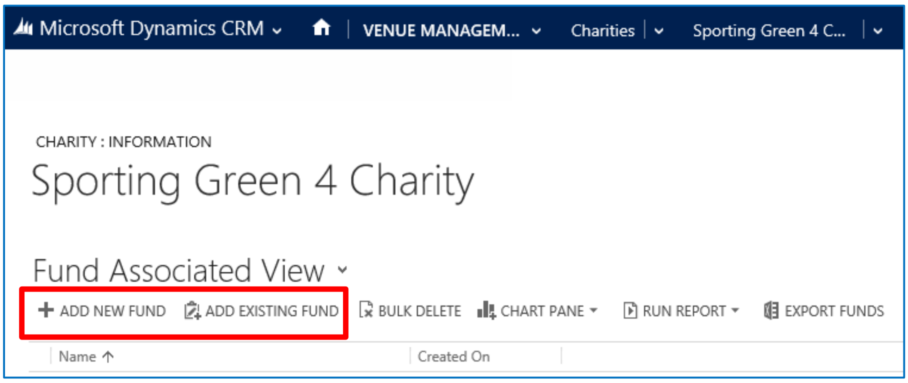
A Charity must be associated with at least one Fund in order for the Gift Aid claiming process to work. A fund can only be related to one Charity, but can be related to many products. A Charity can have many funds.

To associate a Fund to a Charity follow the instructions below:

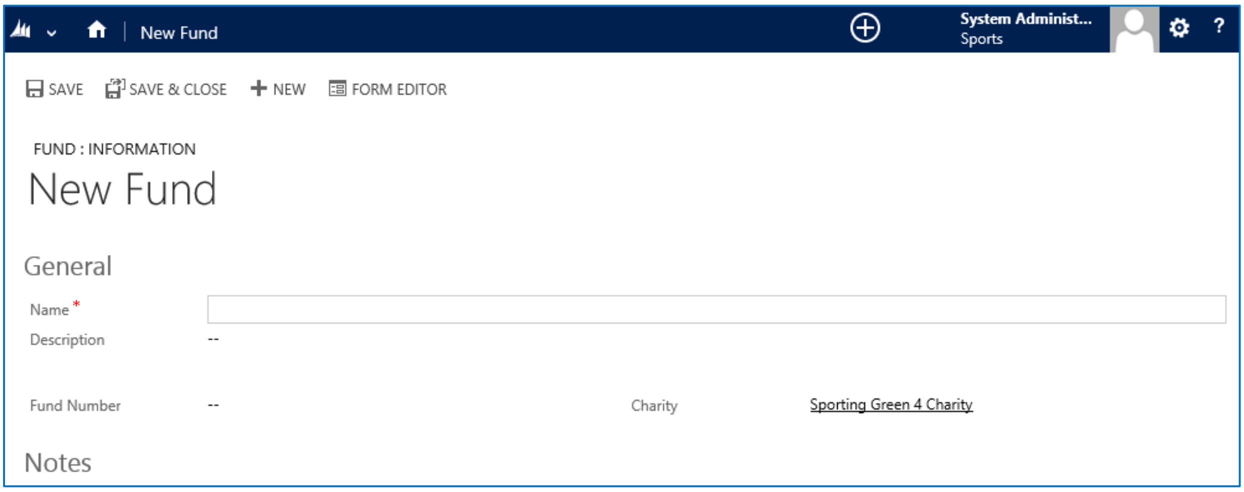
a) Select the small arrow next to the name of the charity and from the drop down select **Funds**.



b) The Fund Associated View will open providing the options to **Add New Fund** or **Add an Existing Fund**.



c) If a new Fund is to be added, select the **Add New Fund** option on the Ribbon. A new Fund form will be displayed, complete the following:



- **Name.** Enter the name of the Fund.
- **Description.** Enter a description of the Fund.
- **Fund number.** This field is used to sequence the Fund name in the user interface. Many funds can be associated with one Charity.
- **Charity**. This field will be prepopulated with the Charity name.

d) Select **Save & Close** on the ribbon. The fund will be associated to the applicable Charity.

EXAMPLE OF A CHARITY AND ASSOCIATED FUND

The table below shows the mandatory fields that have been completed in a Charity form that has been created as an example for this document. The second table below shows an example of the mandatory fields that have been completed in a Fund form that has been associated to this Charity.

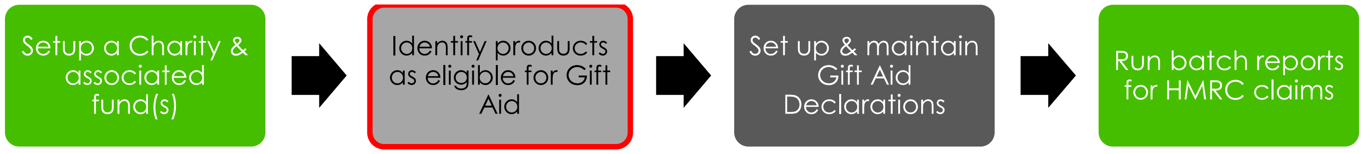
Example a Charity form:

Record Type	Name	Charity Number	Declaration Historical Years	Declaration Statement	Gift Aid Percent	Declaration Future Years
Charity	e.g. Sporting Green 4 Charity	e.g. 1234	e.g. 4	Enter declaration statement here	e.g. 25%	e.g. 3

Example of a Fund form:

Record Type	Name	Fund Number	Charity
Fund	Sporting Stars Foundation	e.g. 123456	Sporting Green 4 Charity

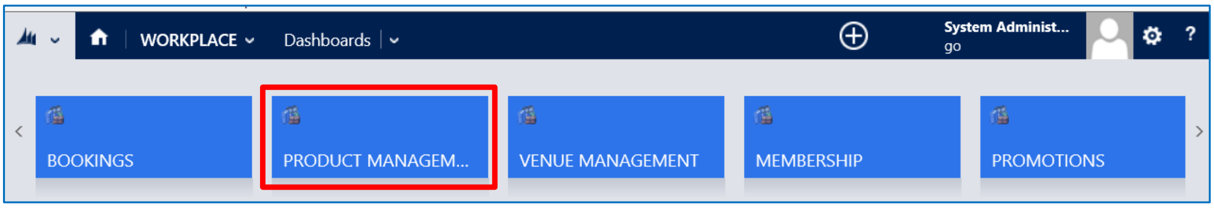
STEP 2. FLAG THE BOOKABLE PRODUCTS FOR GIFT AID



In order for Gift Aid to work, the applicable Bookable Product must be flagged for Gift Aid and have a donatable percentage applied.

To set up a Bookable Product for Gift Aid:

a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.

c) A list of the currently active Bookable Products will be displayed. Select **New** in the ribbon to create a new Bookable Product or select an existing Bookable Product to add or modify for Gift Aid.

d) Within the Bookable Product form, ensure that the following fields are completed:

Note: The fields that are not listed below do not need to be completed or changed.

General

- **Name.** Enter a name for the Bookable Product.
- **Type.** Select the Product Type from the options available. The types selected would be:
  - **Donation** – to set up a donation product that does not have a specified value (i.e. end customer will capture the value of the product)
  - **Stock** – to set up a donation product that has a specified value

> **Note:** All product types can be flagged as eligible for Gift Aid, however it is recommended to use **Donation** and **Stock** types.

- **Category.** Select the appropriate Category for this product or create a new one. The product will appear in this Category on the POS.

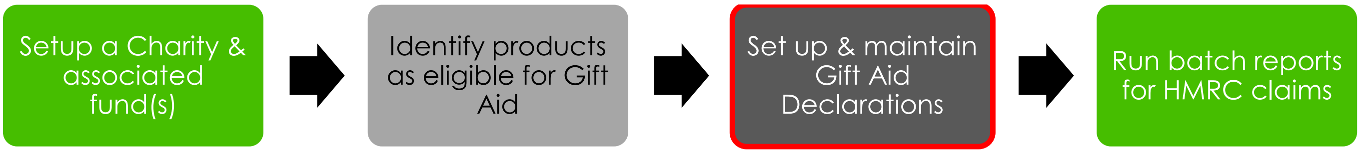
Donations

- **Donation Percentage.** Enter the percentage of the price of the Bookable Product that is eligible for donation. This amount could be 1-100%. If the entire cost of the product is eligible for donation, then 100% should be captured. For example, if the Bookable Product has a 'Donation Percentage' of 50% and a sell price of £10 and a quantity of 4 are sold, then the amount of donation generated is: ((4 x 10) / 100) * 50 = £20. The percentage amount of Gift Aid applied (as defined in the Gift Aid Rate set up) will only be applied to £20 and not the full value of the sale £40.
- **Fund.** Using the Look Up, select the Fund the Bookable Product should be associated with in order for a donation to be created when this product is sold.
- **Gift Aid.** Select **Mandatory** if Gift Aid is required when purchasing this product. Select **Optional** if there is to be a choice of Gift Aid being required or not.

> **Note:** For a product to create Gift Aid donations, it must be associated to an active Fund and it must have a Donation Percentage value between 1 and 100.
>
> A product is implicitly Gift Aid-able if it has a Donation Percentage greater than 0, but its **Gift Aid** flag must be set as **Mandatory** or **Optional**.
>
> If set to **Optional,** Gift Aid will be applied if a valid Declaration is found for the contact and an option is provided to create a Declaration if one does not exist. If no Declaration is used or created, then the product can still be sold and a donation record will be created for the sale.
>
> If Gift Aid is set up as **Mandatory** and the end customer does not want to make a Gift Aid donation, the sale would not be possible until the mandatory Gift Aid Product or Products are removed from the basket.

The Bookable Products flagged for Gift Aid must also have the **Channels** it is to be sold upon selected as well as the **Variants**, a valid **Variant Price List** and **Pricing** chosen. More information on these can be found in the Go CRM 2015 Product Management User Guide and Go CRM Infrastructure Setup User guide.

STEP 3. DECLARATIONS

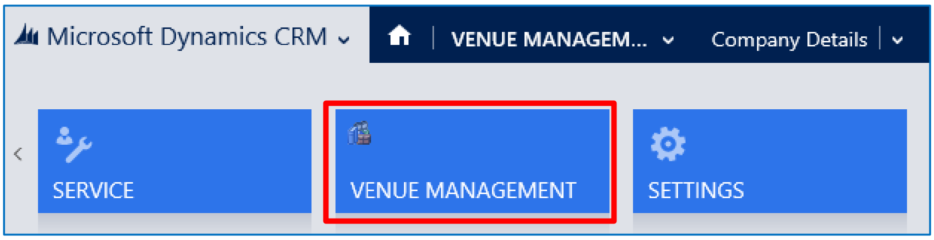


When an end customer selects the option to make a Gift Aid payment, they are required to complete a Declaration. A Declaration can be created in CRM, but typically, it would be created via the Web by the end customer or via the POS where the declaration is read out to the end customer by the POS Operator. A Declaration must be associated with a Charity in order to be valid.

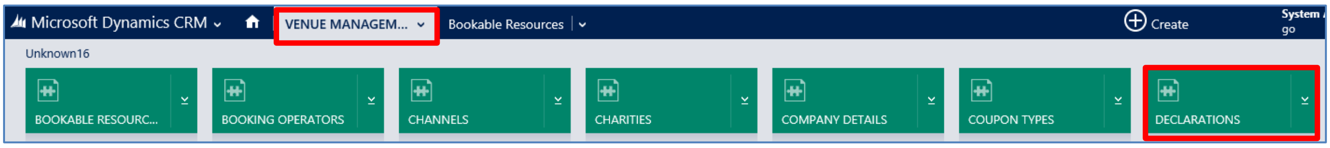
When an end customer who meets the criteria and has selected the confirmation option(s) available, a declaration record is created in CRM against their contact record. A contact record could be associated with more than one declaration, i.e. over a period of time these could be accumulated, but typically there will be one declaration per contact record.

To find a Declaration record in CRM complete the following:

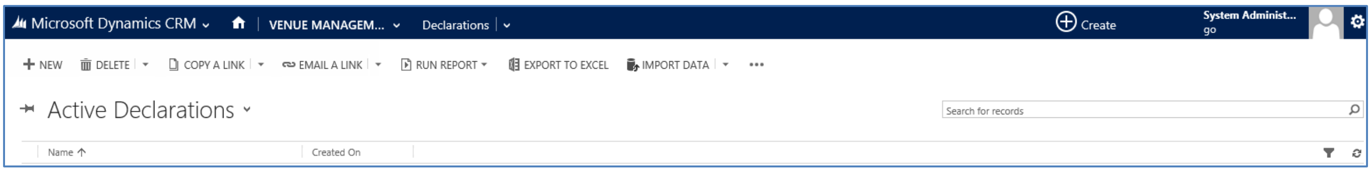
a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.



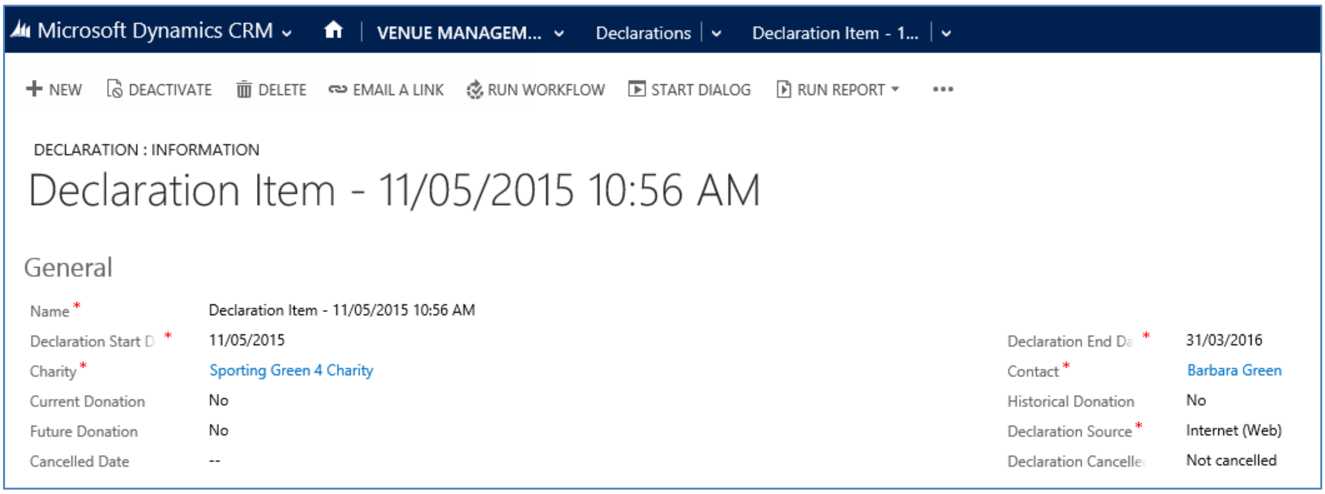
b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Declarations.**



c) The Active Declarations view will be displayed. The Search for records text box can be used to search for the Declarations name.



d) Open the appropriate Declaration, the following information will be shown:

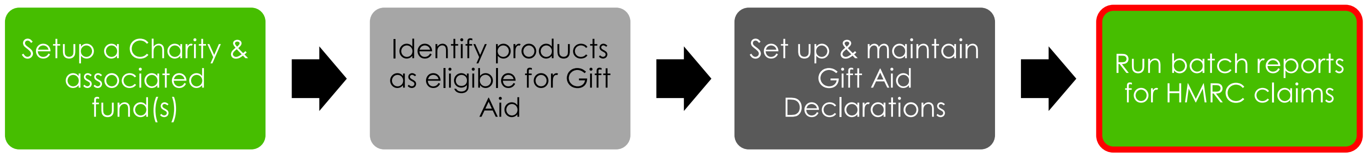


- **Name.** System generated, based on the date and time the Declaration was created
- **Declaration Start Date.** The date the Declaration is valid from. This could be a date in the past if the option to Donate Historical Gift Aid donations was selected by the end customer.
- **Charity.** The name of the Charity that the Declaration is associated to.
- **Current Donation.** If the end customer chose to make the declaration applicable to all Gift Aid donations made on this day, the Start Date. This should always be **Yes.**
- **Future Donation.** If the end customer chose the option to make the declaration applicable to all future Gift Aid donations this option would be set to **Yes.** If not, the option would be **No.**
- **Declaration End Date.** The date the Declaration is valid until. This date could be in the future if the option to donate future Gift Aid donations was selected by the end customer.
- **Contact.** The name of the end customer that the Declaration was created for.
- **Historical Donation.** If the end customer chose the option to make the declaration applicable to all historical Gift Aid donations this option would be set to **Yes**. If not, the option would be **No.**
- **Declaration Source.** The Channel where the Declaration was taken e.g. POS, the Web.

The facility also provides for end customers to be able to cancel their declarations if their tax situation changes. If a declaration is cancelled, the date and reason for cancellation is captured:

- **Cancelled Date.** This is the date when the Declaration was cancelled.
- **Cancellation Reason.** Options listed are; **Not cancelled** (default), **No longer pay tax**, **Do not approve** or **Refused to give a reason**.

STEP 4. CREATING BATCHES FOR SUBMISSION TO HMRC

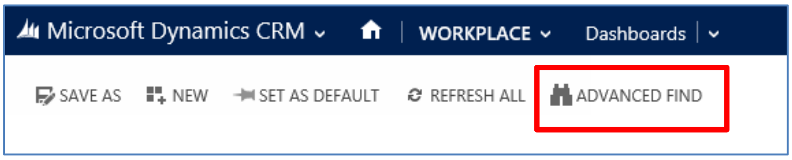


Periodically there is a need to create a batch of donation type payments that Gift Aid can be claimed against. These batches can then be submitted to HMRC to claim the Gift Aid amounts. This process in CRM results in the creation of a Donation Batch Header which is made up of Donation Batch Lines, i.e. the specific donation amounts made.

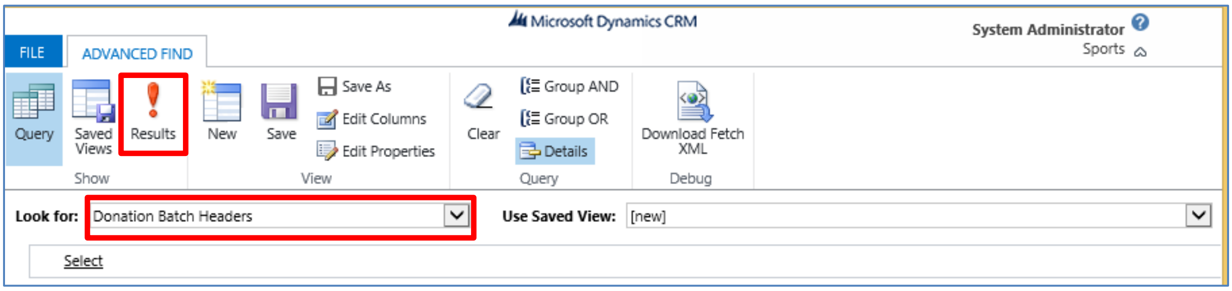
The Donation Batch Header created will not include any donations that have previously been included in the batch creation process. Details of how to create a Batch Header and the mechanism of this process are described below.

To create a gift aid batch carry out the following:

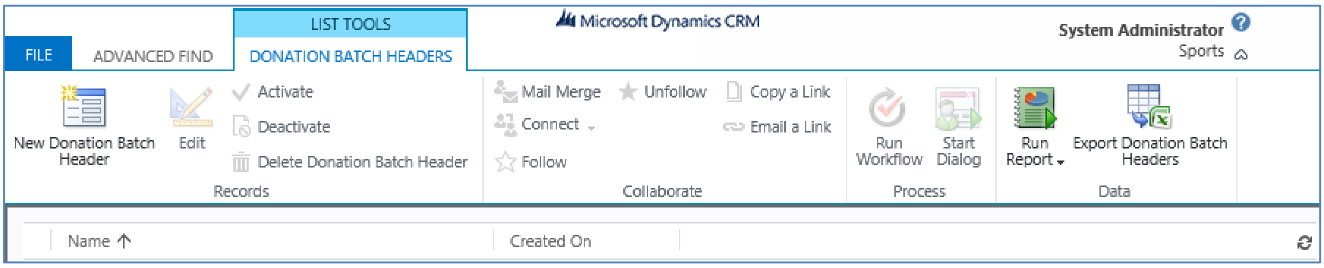
a) Select Advanced Find on the ribbon within the Workplace are of CRM.



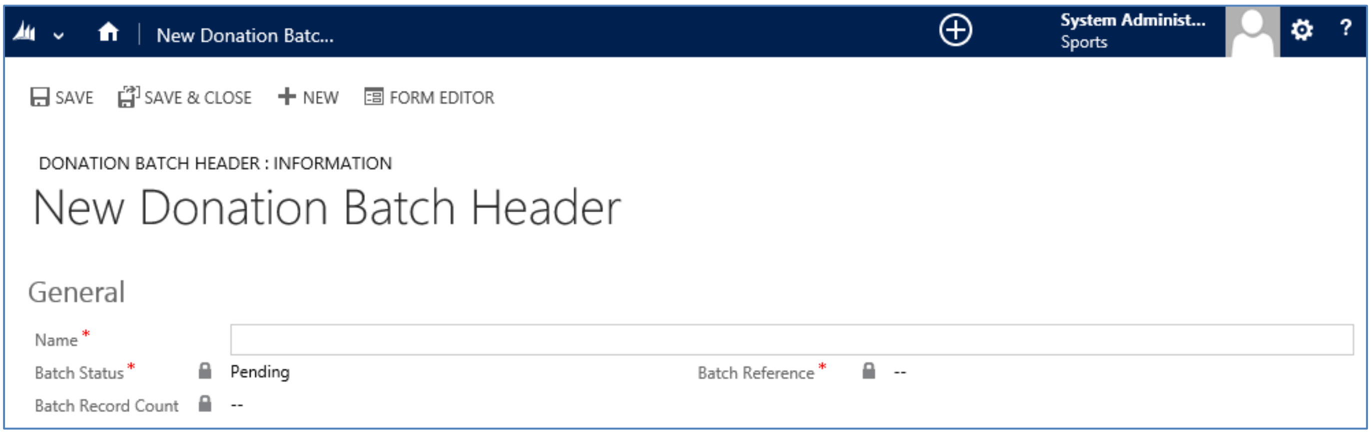
b) The Advanced Find window will pop up. Choose **Donation Batch Headers** in the **Look for** drop down box. Before selecting **Results** in the ribbon.



c) Any previously created Donation Batch Headers will be displayed. Choose **New Donation Batch Header** to create a new one.



d) A blank Donation Batch Header form will be displayed. Complete the following:



- **Name.** The name of the batch will be auto generated when the form is saved, e.g. Donation Batch 1000028.
- **Batch Status.** This is a drop down field with the following options, Pending, Sent, Processed and Failed. This field defaults to Pending.
- **Batch Reference.** This field will be auto generated when the Batch Header is saved.
- **Batch Record Count.** This field will be auto populated with the number of donation lines that are included in the batch once it has run.

e) Select **Save & Close** on the ribbon to create the Donation Batch Header.

f) When the Donation Batch Header has been **Saved & Closed**, the following items will be processed:

- **Create Historical Donations** – where customers have indicated that Gift Aid can be claimed on all their historical donations, a donation record will be created for any donations found for this customer where Gift Aid has not already been claimed in the specified period. The donation record created will be called **Historical Donation Item** and labelled with the current date and time.
- **Create Donation Batch Lines** – a Donation Batch Line record will be created for all donations in the system where:
  - o A donation is associated to a valid Gift Aid Declaration and the contact record associated to the Declaration has a first name, last name, first line of address and Postcode
  - o The donation has no status i.e. null or empty
  - o The donation is not linked to a CAF payment type

  All Donation Batch Lines created will be associated to the Donation Batch Header.
- **Set Donation Status to Pending** – the status of all the donation records that are associated with the newly created Donation Batch Lines will be updated to Pending. This will ensure that they are not included in any subsequent batches created.
- **Create the Donation Batch Header –** the Donation Batch Header will be created, the count of Donation Batch Lines updated and the Batch Reference Number field populated.

g) The Donation Batch Lines included in the Header created can be viewed by selecting the small arrow next to the name of the Donation Batch Header within the Donation Batch Header form, before choosing **Donation Batch Lines** from the drop down.

h) To export the batch items for submission to HMRC, select the option **Export Donation Batch Lines** on the ribbon.

i) The Export Data to Excel dialog will be displayed. Select either **Static worksheet with records from this page**, or if there are multiple pages of records **Static worksheet with records from all pages**. Select **Export**.

j) The records can be opened or saved as an excel spreadsheet.

2. DONATIONS

Donations management by Go offers multiple ways which donations can be made. Donations can firstly be created so that the end user can donate their own defined amount to a charitable fund or, it is also possible to set up fixed price products which will donate the total product cost. Finally donations can be setup to appear in the shopping basket area of the sales channel, giving the user options to either donate their own amount, donate a certain percentage of their booking or to make a donation by rounding their booking total up.

This section will instruct how the above can be setup within CRM 2015.

2.1. SETTING UP A DONATION TYPE BOOKABLE PRODUCT

A Donation product can be set up in two ways:

i. If the cost of the donation is to be defined by the end customer, a Donation type Bookable Product must be created with a Variant set up with a zero price. This would be used where the customer is allowed to enter their own donation amount.

ii. If the donation is a set amount determined by the Charity, then a Stock type Bookable Product should be set up and a Variant price defined. For example the set value of purchasing the product will go to the charity.

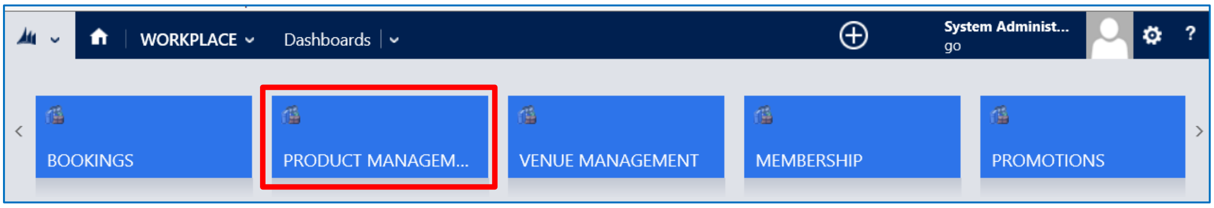
USING THE DONATION TYPE BOOKABLE PRODUCT – END CUSTOMER DEFINES DONATION AMOUNT

A Donation type Bookable Product is used if the donation amount is defined by the end customer. This means that it is possible for a customer to enter and donate any value to the chosen fund.

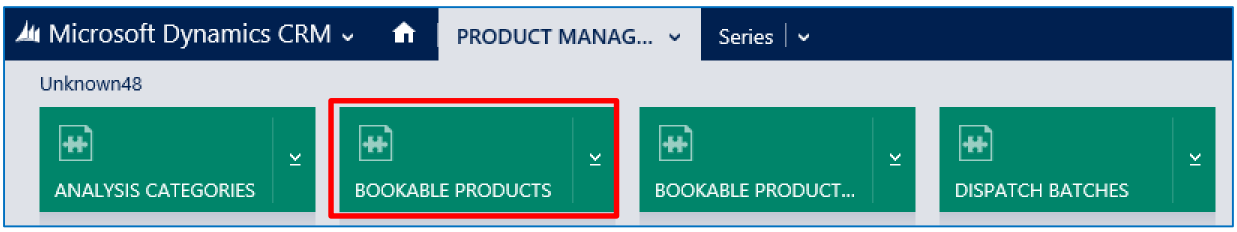
Before creating the Bookable Product a Variant type of Each, a valid Variant Price List, Sales Plan type of Other and a linked Channel Price List should be created. Information on these can be found in the Go CRM 2015 Product Management User Guide.

To create the Donation type Bookable Product, complete the following:

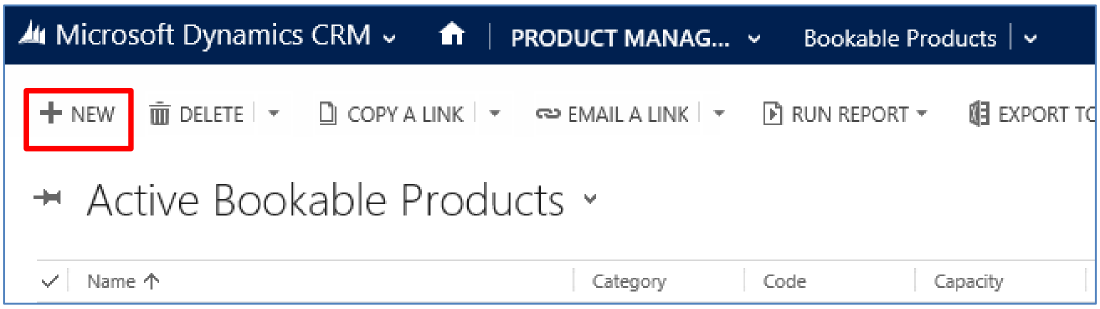
a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.



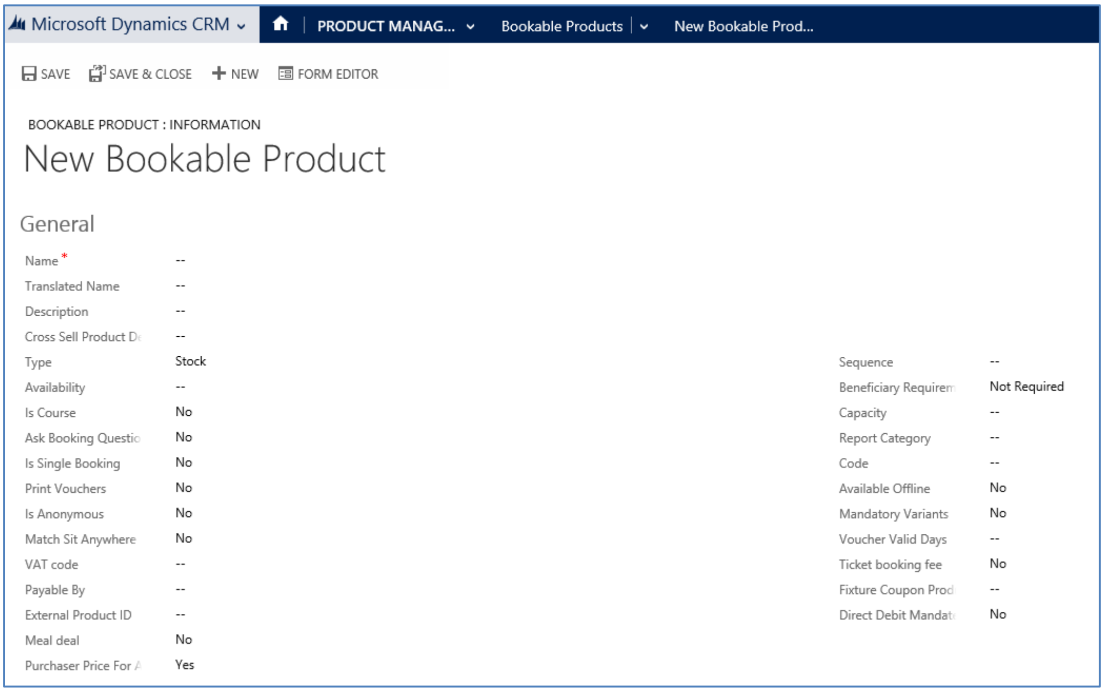
b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.



c) A list of the currently active Bookable Products will be displayed. Select **New** in the ribbon to create a new Bookable Product.



d) A blank Bookable Product form will be displayed. Complete the following fields:



General

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product, for example Own Amount.
- **Translated Name.** If applicable, this field can be used for translated implementations. See the Go CRM 2015 Product Management User Guide for more information.
- **Description.** Enter a description of the product.
- **Type.** Use the drop-down list to select **Donation** product type.
- **Category.** Use the Look Up to capture the Category against which this product will be sold or select **New** to create a new category, for example Donations.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.

Donations

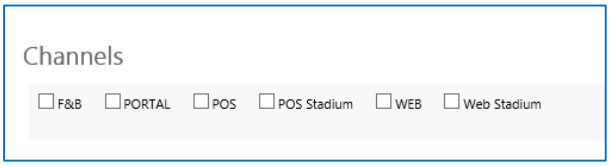
- **Donation Percentage.** This field should be set to 100%.
- **Default Donation Amount.** This is an optional field and relates to the set-up of the Shopping Basket Donation process. If the Bookable Product being set up is for the Shopping Basket Donation process the amount entered here would be the default donation amount that the end customer would be prompted for when in the shopping basket. This amount would only show if a Donation Percent has not been captured against the Channel. If this field is left blank, the default donation amount that the end customer would be prompted with would be zero. The Donation Percent amount overrides this amount. This is explained further in the Shopping Basket Donation Process section.
- **Fund.** Using the Look Up, capture the Fund against which the Donation amount will be allocated. Information on creating a Fund can be seen in Step 1 of section 1 of this document
- **Gift Aid.**
  - Select **Mandatory** if Gift Aid must be applied to the Donation Product, if the end customer cannot complete a Gift Aid Declaration, this product will have to be removed from the shopping basket.
  - The default setting is **Optional** as it is implied that the end customer will be prompted for a Gift Aid Declaration if the Donation Percentage for any product in the shopping basket is greater than zero.

k) Select **Save** on the ribbon to save the product.

l) Next, it is necessary to indicate which **Channels** the product can be bought. To set the Channels carry out the following:

I. Scroll down to the **Channels** section of the Bookable Product form

II. The Channels which have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold, for example POS and Web.

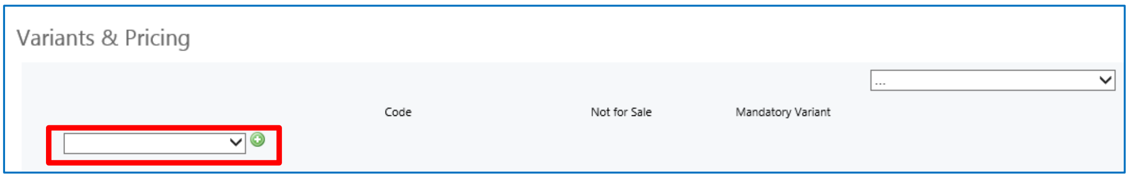


III. Select **Save** on the ribbon.

m) Next, it is necessary to identify the Product Variants and Prices:

I. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

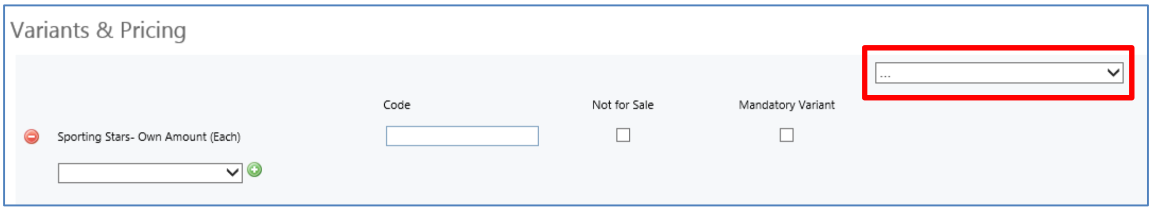
II. To select a Variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option, for a Donation type Bookable Product the Variant of Each should be chosen.



III. Select the green cross alongside the Variant name to add a new Variant. If you need to remove a variant, click the red minus sign alongside the variant.

n) Next, the price of the product must be entered, to do this:

I. Select the relevant Variant Price List from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



II. Peak Price and Off Peak Price fields will appear upon selecting the appropriate Variant Price List. In both the Peak Price and Off Peak Pricing fields the same price information should be entered for each of the variants that have been selected. For Donation type products the price of 0.00 should be entered.

o) Once the pricing details are complete select the Save icon in the bottom right hand corner of the screen. The product will now appear on the set channel and if the end customer wanted to make a donation, they would select the relevant donation product. This process is explained in the EPOS User Guide.

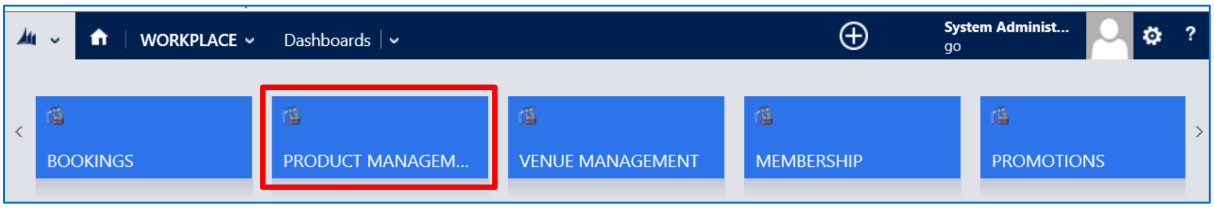
USING STOCK TYPE BOOKABLE PRODUCTS – THE DONATION AMOUNT IS PREDEFINED

A Stock type Bookable Product can be set up and used if a donation is to be defined to a certain amount. For example the set value of purchasing a certain product will go to the charity.

Before creating the Bookable Product a Variant type of Each, a valid Variant Price List, Sales Plan type of Other and a linked Channel Price List should be created. Information on these can be found in the Go CRM 2015 Product Management User Guide.

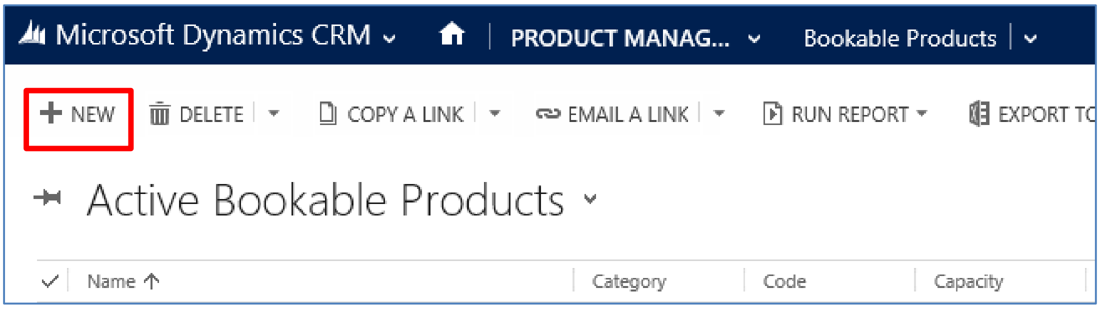
To create the Donation type Bookable Product, complete the following:

a) Select or hover over the **Microsoft Dynamics CRM** tab before scrolling across the drop down list of the navigation bar and selecting **Product Management**.

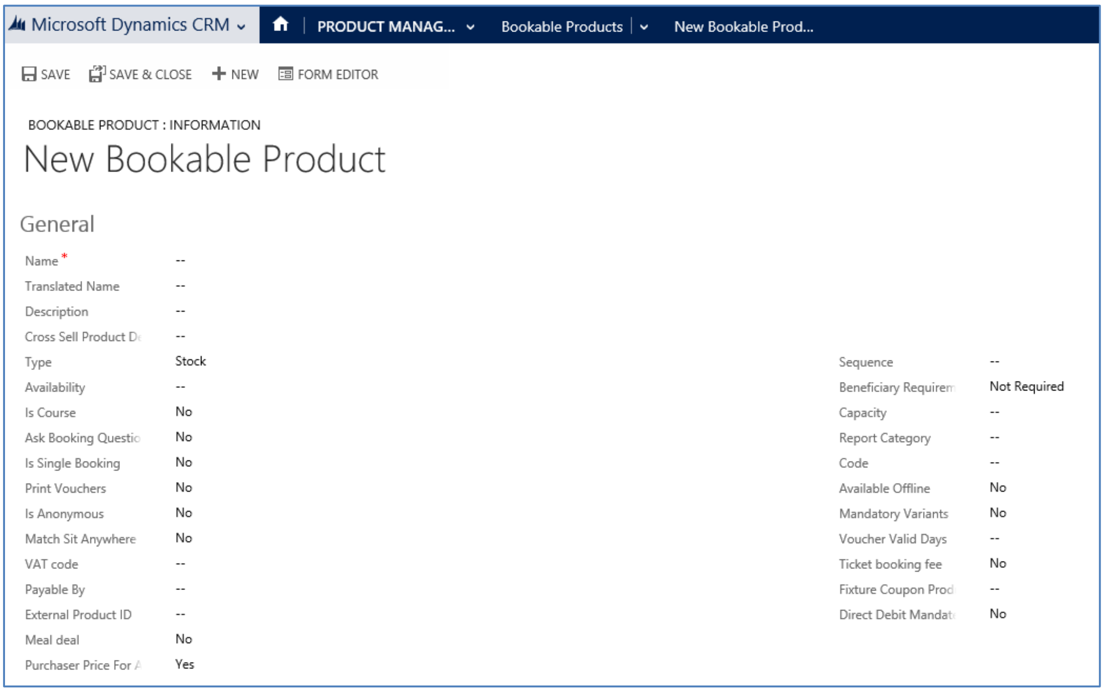


b) Next, in the Product Management area of CRM, select the **Product Management** tab before selecting **Bookable Products** from the drop down.

c) A list of the currently active Bookable Products will be displayed. Select **New** in the ribbon to create a new Bookable Product.



d) A blank Bookable Product form will be displayed. Complete the following fields:



General

- **Name.** Enter a name for the product. The name will be visible to customers, and should therefore reflect the nature of the product.
- **Translated Name.** If applicable, this field can be used for translated implementations. See the Go CRM 2015 Product Management User Guide for more information.
- **Description.** Enter a description of the product.
- **Type.** Use the drop-down list to select **Stock** product type.
- **Category.** Use the Look Up to capture the Category against which this product will be sold or select **New** to create a new category, for example Donations.
- **Sequence.** If applicable, enter a sequence number for the product. The sequence number is used to determine the order in which products are displayed in the POS and Web channels.

Donation

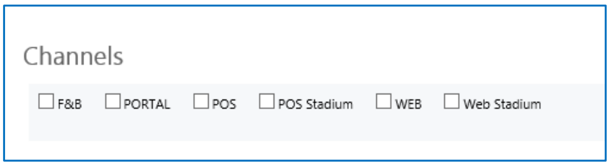
- **Donation Percentage.** This field should be set to 100%.
- **Default Donation Amount.** This is an optional field and relates to the set-up of the Shopping Basket Donation process. If the bookable product being set up is for the Shopping Basket Donation process the amount entered here would be the default donation amount that the end customer would be prompted for when in the shopping basket. This amount would only show if a Donation Percent has not been captured against the Channel. If this field is left blank, the default donation amount that the end customer would be prompted with would be zero. The Donation Percent amount overrides this amount. This is explained further in the Shopping Basket Donation Process section of this document.
- **Fund.** Using the Look Up, capture the Fund against which the Donation amount will be allocated. Information on creating a Fund can be seen in Step 1 of section 1 of this document
- **Gift Aid.**
    - Select **Mandatory** if Gift Aid must be applied to the Donation Product, if the end customer cannot complete a Gift Aid Declaration, this product will have to be removed from the shopping basket.
    - The default setting is **Optional** as it is implied that the end customer will be prompted for a Gift Aid Declaration if the Donation Percentage for any product in the shopping basket is greater than zero.

e) Select **Save** on the ribbon to save the product.

f) Next, it is necessary to indicate which **Channels** the product can be bought. To set the Channels carry out the following:

IV. Scroll down to the **Channels** section of the Bookable Product form

V. The Channels which have been set up during the configuration on your system will be listed. Select the checkbox alongside each Channel through which the product will be sold, for example POS and Web.

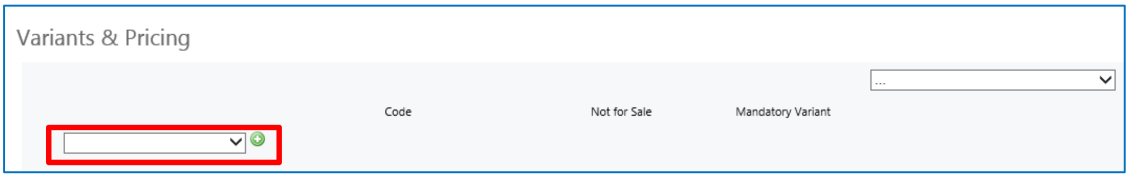


VI. Select **Save** on the ribbon.

g) Next, it is necessary to identify the Product Variants and Prices:

IV. Scroll down to the **Variants & Pricing** section of the Bookable Product form.

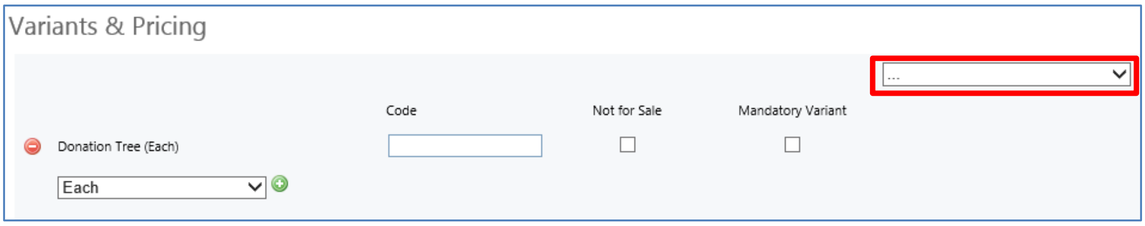
V. To select a Variant, in the drop-down list on the left hand side (highlighted below), select the appropriate option, the Variant of Each should be chosen.



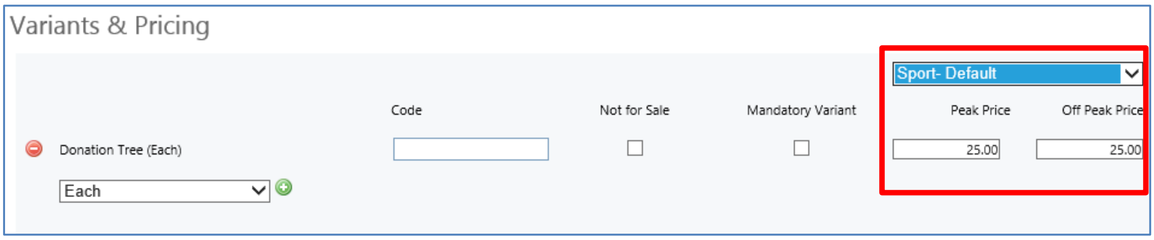
VI. Select the green cross alongside the Variant name to add a new Variant. If you need to remove a variant, click the red minus sign alongside the variant.

h) Next, the price of the product must be entered, to do this:

III. Select the relevant Variant Price List from the drop down at the right hand side of the Variants & Pricing section (highlighted below).



IV. Peak Price and Off Peak Price fields will appear upon selecting the appropriate Variant Price List. In both the Peak Price and Off Peak Pricing fields the same price information should be entered for each of the variants that have been selected.



i) Once the pricing details are complete select the Save icon in the bottom right hand corner of the screen.

The product will now appear on the set channel at the price set up (£25 in this example). In this example, Gift Aid was set to Mandatory when purchasing this product so cannot be sold if a Gift Aid Declaration is not completed by the end customer.

2.2. SHOPPING BASKET DONATION PROCESS

The Shopping Basket donation refers to a number of options that appear which allows a user to donate within the Shopping Basket area of the relevant sales Channel. The Shopping Basket Donation allows a certain percentage of a booking to be offered as a donation, the ability to allow a customer to offer their own donation amount, as well as enabling the donation to be rounded up to the nearest whole number.

As well as a Donation type Bookable Product having to be set up for the Shopping Basket Donation, the following additional fields need to be completed in the Donation section of the Channel form.

Note: A Donation type Bookable Product has to be set up for this process

Ensure product type is set to Donation and Variant with a zero price has been added.

This section assumes that all relevant Channels have been created, for more information see the Go CRM 2015 Infrastructure Setup User Guide.

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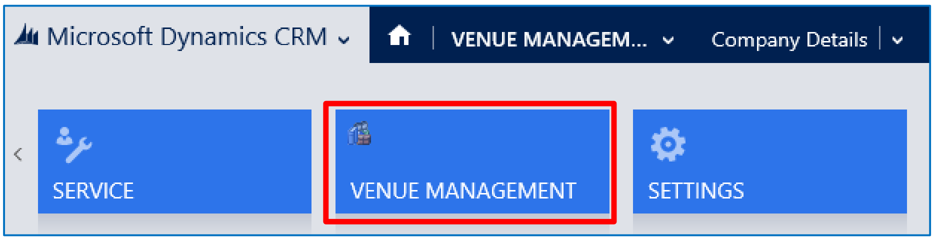
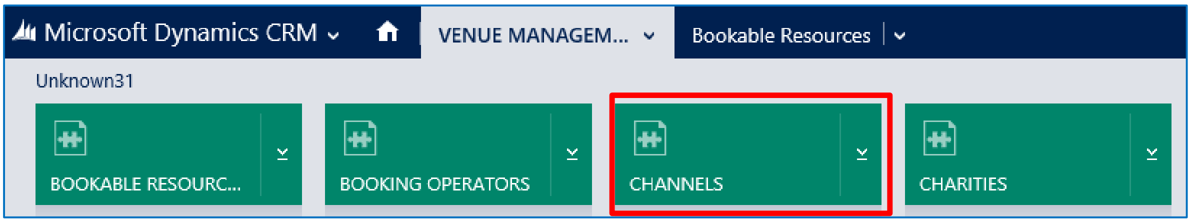
a) Within CRM, select the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and choosing **Venue Management** from the drop down.

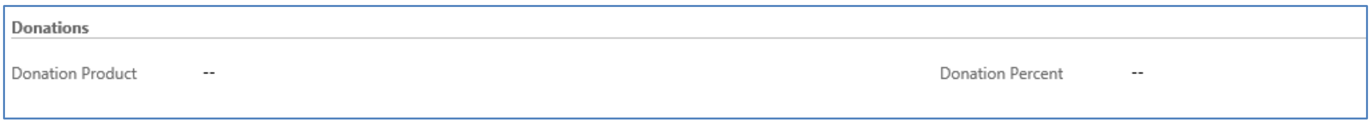


b) Next select the **Venue Management** tab in the navigation bar and from the drop down choose **Channels.**



c) The Active Channels view will be displayed, select and open the Channel that the Shopping Basket Donation process is to take place within.

d) Within the Channel form scroll down to the **Donations** section and complete the following:



- **Donation Product.** Using the Look Up, select the Donation type Bookable Product set up to prompt for the donation. The system will then prompt for an additional donation to be made when all products are added to the Shopping Basket.

- **Donation Percent.** The percentage captured in this field will calculate the suggested donation amount which will be a percentage of the total booking value. For example, if 20.00 is entered in this field, the suggested shopping basket donation will be calculated as Booking Value /100 * 20%. This amount can be changed or cancelled by the end customer.

  If this field is left blank, the Shopping Cart Donation process will use the amount entered in the **Default Donation Amount** field that is set up against Donation type Bookable Product as shown below. In this example, if the Donation Percent field was not filled in with 20%, the system will prompt for a donation of £1.

Note: If both the **Donation Percent** field in the Channel and the **Default Donation Amount** field in the Bookable Product are blank, the Shopping Cart Donation defaults to 0.00 allowing the end customer to select their own amount

2.3. PAYMENT METHODS

A CAF payment method is available for use when donors make a donation from a CAF (Charities Aid Foundation). The options Yes or No are available to select when a donation is made. If the option Yes is selected, no additional Gift Aid can be collected. If No is selected, Gift Aid can be collected.

END OF DOCUMENT