



*Campaign Management Release Notes:
Volunteer Hours Match*

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Introduction

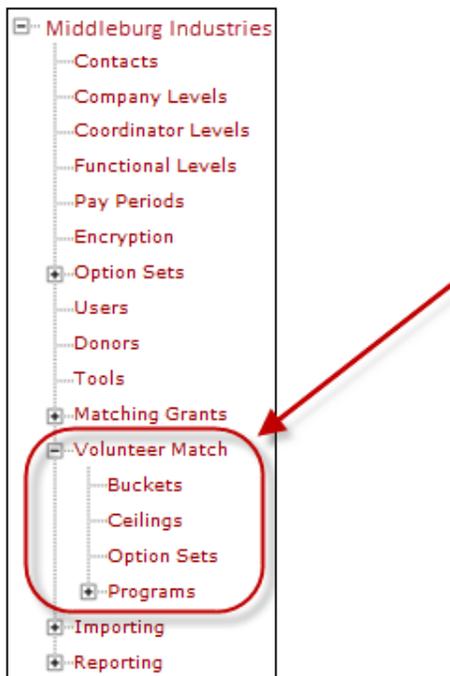
The Volunteer Match in Campaign Management enhancement allows users to log and submit hours volunteered to be approved for corporate match. With Volunteer Match, campaign administrators can set match rules, including minimum hours, rate per hour, exclusions, and ceilings. Volunteer Match is only available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

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

1. Create a Bucket
2. Create Program Ceilings (Optional)
3. Configure Volunteer Match Program
4. Create a Volunteer Match Option Set

Each of these steps is configured in the Volunteer Match section of the CM Company level.

1. Log in to Campaign Management and navigate to the left navigation tree. Select the  **Companies** node. Select and 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.

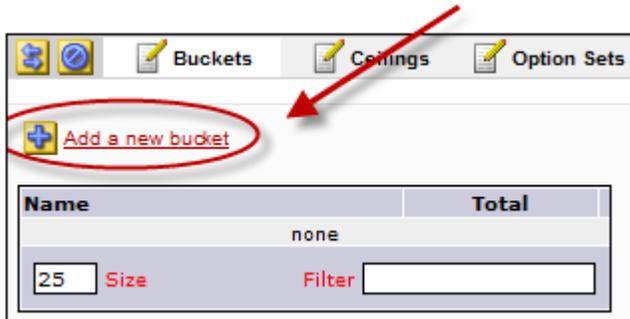
Create a Bucket

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 Match Programs.

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



2. Click the "Add a new bucket" link.



3. 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> Note: Because this is a required field, a value must be entered. If the company does not have a defined volunteer match funds bucket, enter "999999999" (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.

4. Repeat steps 2 & 3 to create additional buckets.

Create Program Ceilings (Optional)

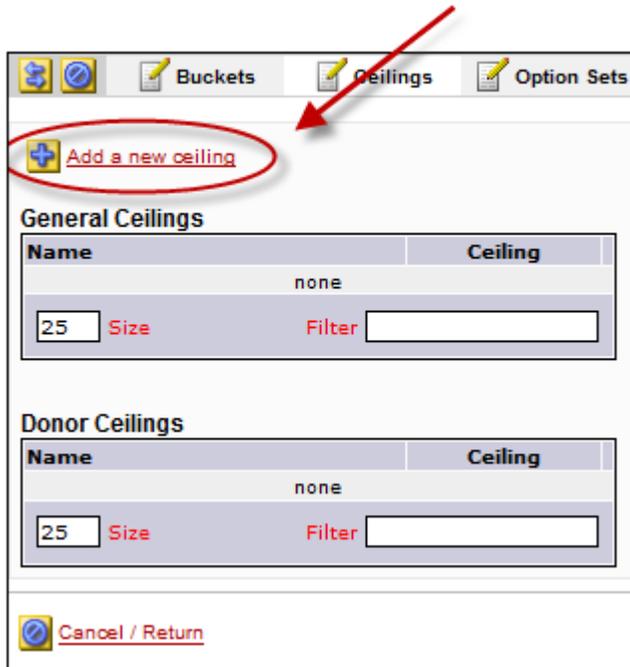
Ceilings define the maximum volunteer match funds that will be allocated in a program. Ceilings can be set as "General" (max for all requests) or "Donor" (max for all requests made by an individual donor). Ceilings can be established for a single Volunteer Match Program or to multiple programs. If the 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 Match Option Set.

Creating ceilings is an option feature that allows for complex Volunteer Match 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.



3. 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 – select 'General' or 'Donor' from the drop-down list.
*	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 – enter the dollar value into the text box. Do not include any commas or current symbols.
	Ceiling Adjustment	Allows you to adjust the total dollars available for users of the online system by either a positive or negative number.

4. Repeat steps 2 & 3 to create additional ceilings.

Configure Volunteer Match Program

The Volunteer Match Program allows for configuration of the basic volunteer match program rules (minimum donation amount, maximum match grant amount, and match rate), and once established, the Volunteer Match 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 Match Program" link.



3. 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. Note: 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> Note: 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. Note: 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> Note: 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

4. The **Content** tab will activate. Click here.

Content

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	

5. 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 Match 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.

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

7. The **Rules** tab will activate. Click here.

8. Click the "Add a new rule" link.

9. Fill in the fields provided to define the Volunteer Match 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 donations will be matched. The rate can be either a percentage of the donation or a flat amount per transaction – <i>enter the rate amount into the text box, then select either 'Dollars' or 'Percentage' from the dropdown list to indicate the rate type.</i> Note: The default rate type is 'Dollars.'
	Minimum Designation	Indicates the minimum donation amount that must be met in order for the gift to be matched. Note: Leave blank if there is no minimum amount required.
	Minimum Match	Indicates the minimum volunteer match amount that will be disbursed. Note: Leave blank if there is no minimum grant amount.
	Maximum Match	Indicates the maximum volunteer match amount that can be requested per donation. Note: Leave blank if there is no maximum amount.
*	Active	Indicates if this volunteer match rule is active or inactive. Note: 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.
	Payment Types	Indicates which standard payment type(s) this rule applies to – <i>check the box(es) next to the appropriate payment type(s) to include them.</i> Note: By default all payment types are 'inactive' (unchecked).
	Custom Payment Types	Indicates which of the available custom payment type(s) this rule applies to – <i>check the box(es) next to the appropriate payment type(s) to include them.</i>
	Agencies	Denotes which agency(ies) the volunteer match rule should be applied to - <i>follow the steps below to configure these:</i> <ul style="list-style-type: none"> • Use the search area to locate the desired agency • Click to highlight the desired agency(ies) in the Search Results box • Click <input type="checkbox"/> next to the highlighted agency(ies) to add it to the Selected Agencies box Note: If no agency is selected the Volunteer Match Rule will be applied to all agencies.
	Excluded Agencies	Denotes which agency(ies) are ineligible for volunteer match under this rule - <i>follow the steps below to configure these:</i> <ul style="list-style-type: none"> • Use the search area to locate the desired agency • Click to highlight the desired agency(ies) in the Search Results box • Click <input type="checkbox"/> next to the highlighted agency(ies) to add it to the Selected Agencies box Note: If no agency is selected, no agencies will be excluded and the Volunteer Match Rule will be applied to all agencies.

10. Click "Save/Update" and repeat steps 8 & 9 to create additional rules, if applicable.

11. 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.

12. The **Designation** tab will activate. Click here.