Updated Change and Designs Elements
United Methodist Women
Remittance Entry Portal
Changes and Explanations
December 2019

Prepared for
United Methodist Women

Project
United Methodist Women – Remittance Entry Portal Change Order
Contents

Extra Certificates .................................................................................................................................................. 1
A&MD Caption Change ........................................................................................................................................ 2
A&MD Calculation change .................................................................................................................................... 3
Consolidate Transactions – A&MD Calculation ..................................................................................................... 4
Legacy Fund change................................................................................................................................................ 4
Report Modification ................................................................................................................................................ 4
Appendix A – SMR PIN Codes............................................................................................................................ 5
Extra Certificates

Requirement

- Once you choose Certificate there should be a drop down showing the type of certificate you need to order.
- Treasures need to order extra certificates and they don’t have any place to do so.
- The price for a replacement certificate is $5.00
- Updated Pricing for replacement pins, please see below:
- The date on the certificate should be blank this should be entered by the Treasures only after the certificate is received.

![Add Details](image)

a- The following PIN Type values should be available for the user to select:
1. PLAIN – GOLD
2. SAPPHIRE
3. PEARL
4. EMERALD
5. RUBY
6. DIAMOND
7. DOUBLE DIAMOND
b- Whenever an Extra Certificate is ordered, the price needs to be set to $5.00 (five dollars). All PINs share the same cost.

c- Below is the updated prices for Extra Certificate PINs the system will show:

<table>
<thead>
<tr>
<th>PIN</th>
<th>COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLAIN - GOLD</td>
<td>$5.00</td>
</tr>
<tr>
<td>SAPPHIRE</td>
<td>$5.00</td>
</tr>
<tr>
<td>PEARL</td>
<td>$5.00</td>
</tr>
<tr>
<td>EMERALD</td>
<td>$5.00</td>
</tr>
<tr>
<td>RUBY</td>
<td>$5.00</td>
</tr>
<tr>
<td>DIAMOND</td>
<td>$5.00</td>
</tr>
<tr>
<td>DOUBLE DIAMOND</td>
<td>$5.00</td>
</tr>
</tbody>
</table>

**Note:** The above prices ONLY apply to Extra Certificate PINs, normal PINs are not affected by this logic.

**A&MD Caption Change**

The Remittance Entry form has a field called “Administrative, Membership & Development” has been named to A&MD. The page currently looks like this:
A&MD Calculation change

The Remittance Entry form has been modified to include a new Checkbox field inside the Mission Giving section to allow the user to assign the entire A&MD amount to the project called “Pledge to Mission”. The system currently distributes the A&MD amount through the different projects of the Mission Giving section.

As the following screenshot shows, a new checkbox needs to be added to the A&MD section of the form:

![Screenshot of Mission Giving Form](image)

This new field includes the text “Apply A&MD only to Pledge to Mission?” and once checked the system will automatically update the values and assign the proper amounts to each project line.

![Screenshot of Mission Giving Form](image)

As we can see above, the A&MD amount now only affects the Pledge to Mission project leaving the other projects unaffected.
Consolidate Transactions – A&MD Calculation

When a Conference Treasurer decides to consolidate remittances the portal shows the following screen:

Report Modification

The current system shows a textbox with the Mission Giving total amount as can be seen below:

This amount needs to appear on the printed version (PDF) of the remittance transaction:
A new row has been added to the above report to show the Mission Giving total amount.

**Appendix A – SMR PIN Codes**

The following list includes all PIN Codes agreed with PBD:

**EXTRA CERTIFICATES:**

<table>
<thead>
<tr>
<th>PIN</th>
<th>Cost</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLAIN - GOLD</td>
<td>$5</td>
<td>68.J501CR</td>
</tr>
<tr>
<td>SAPPHIRE</td>
<td>$5</td>
<td>68.J502CR</td>
</tr>
<tr>
<td>PEARL</td>
<td>$5</td>
<td>68.J503CR</td>
</tr>
<tr>
<td>EMERALD</td>
<td>$5</td>
<td>68.J504CR</td>
</tr>
<tr>
<td>RUBY</td>
<td>$5</td>
<td>68.J505CR</td>
</tr>
<tr>
<td>DIAMOND</td>
<td>$5</td>
<td>68.J506CR</td>
</tr>
<tr>
<td>DOUBLE DIAMOND</td>
<td>$5</td>
<td>68.J507CR</td>
</tr>
</tbody>
</table>