



United
Methodist
Women

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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

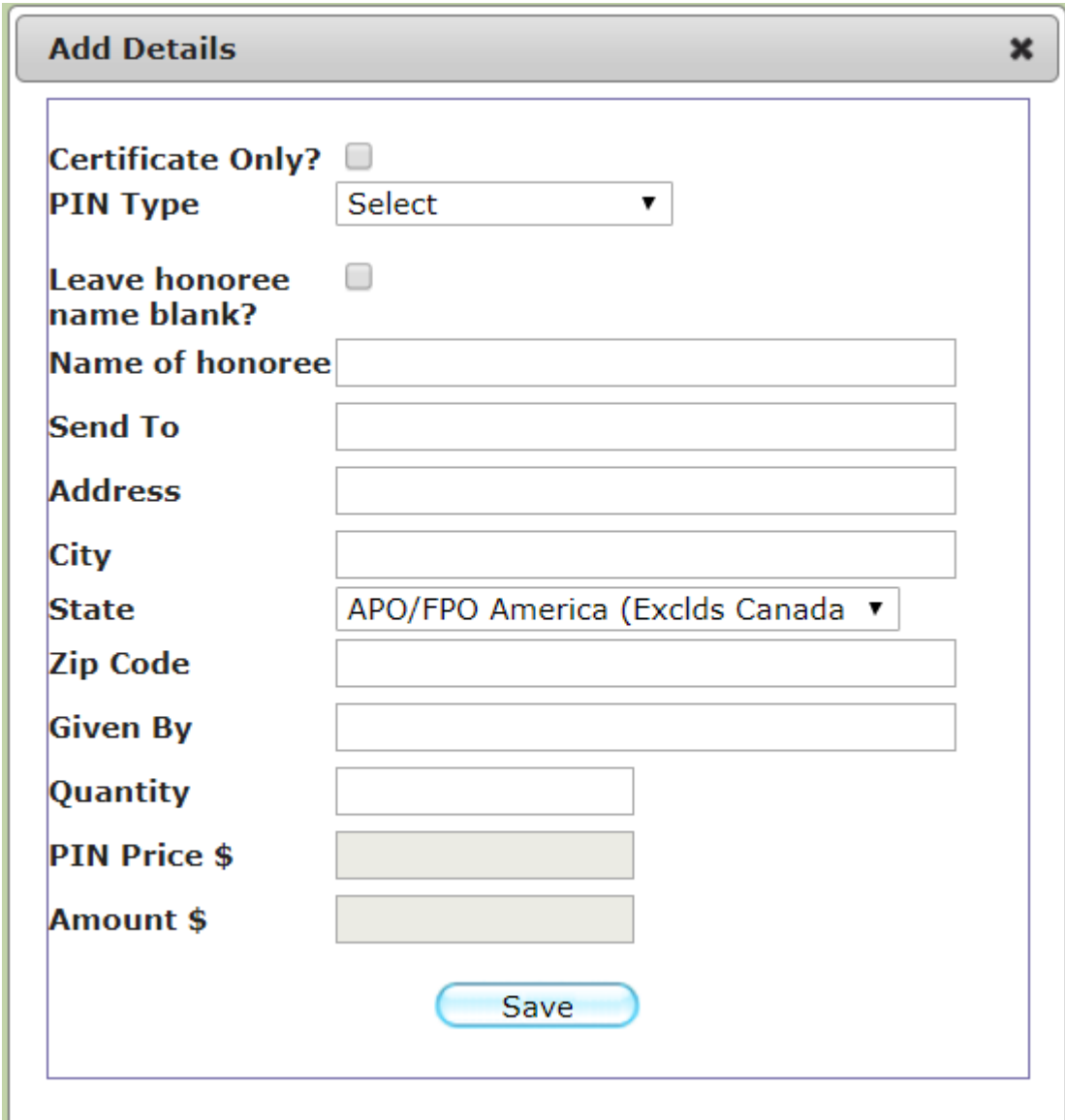
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Extra Certificates

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.



The screenshot shows a web form titled "Add Details" with a close button (X) in the top right corner. The form contains the following fields and options:

- Certificate Only?**
- PIN Type**
- Leave honoree name blank?**
- Name of honoree**
- Send To**
- Address**
- City**
- State**
- Zip Code**
- Given By**
- Quantity**
- PIN Price \$**
- Amount \$**

At the bottom center of the form is a blue "Save" button.

- 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:

PIN	COST
PLAIN - GOLD	\$5.00
SAPPHIRE	\$5.00
PEARL	\$5.00
EMERALD	\$5.00
RUBY	\$5.00
DIAMOND	\$5.00
DOUBLE DIAMOND	\$5.00

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:

MISSION GIVING

	Original Amount	New Amount
PLEDGE TO MISSION	150.00	<input type="text" value="150.00"/>
GIFT TO MISSION	655.00	<input type="text" value="655.00"/>
GIFT IN MEMORY	0.00	<input type="text" value="0.00"/>
WORLD THANK OFFERING	0.00	<input type="text" value="0.00"/>

Project	Fundraising Initiative	Amount	Actions

Apply the A&MD only to Pledge To Mission?

\$

Mission Giving Total

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:

MISSION GIVING			
	Original Amount	New Amount	
PLEDGE TO MISSION	150.00	<input type="text" value="150.00"/>	
GIFT TO MISSION	655.00	<input type="text" value="655.00"/>	
GIFT IN MEMORY	0.00	<input type="text" value="0.00"/>	
WORLD THANK OFFERING	0.00	<input type="text" value="0.00"/>	

Project	Fundraising Initiative	Amount	Actions

Apply the A&MD only to Pledge To Mission?

\$

Mission Giving Total

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.

MISSION GIVING			
	Original Amount	New Amount	
PLEDGE TO MISSION	100.00	<input type="text" value="60.00"/>	
GIFT TO MISSION	100.00	<input type="text" value="100.00"/>	
GIFT IN MEMORY	100.00	<input type="text" value="100.00"/>	
WORLD THANK OFFERING	100.00	<input type="text" value="100.00"/>	

Project	Fundraising Initiative	Amount	Actions

Apply the A&MD only to Pledge To Mission?

\$

Mission Giving Total

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:

<input checked="" type="checkbox"/>	Type	Trx #	Conference	District	Date	Check #	Created By	Total
<input checked="" type="checkbox"/>	REM	21613	Dakota				ldsmith	2,981.00
<input checked="" type="checkbox"/>	REM	21646	Dakota			1232	rbell	3,597.00
<input checked="" type="checkbox"/>	REM	21703	Dakota				srussell	1,609.20
<input checked="" type="checkbox"/>	REM	21873	Dakotas	Southeast	10/22/2019		ldsmith	6,486.50
<input checked="" type="checkbox"/>	REM	21926	Dakotas	Southwest	11/11/2019	1240	rbell	2,416.00
<input checked="" type="checkbox"/>	REM	22082	Dakotas	Southeast	11/30/2019		ldsmith	5,630.50
<input checked="" type="checkbox"/>	REM	22211	Dakotas	Southwest	11/22/2019	1242	rbell	6,655.10
<input checked="" type="checkbox"/>	REM	22279	Dakotas	Southeast	11/22/2019		ldsmith	8,000.00
<input checked="" type="checkbox"/>	REM	22285	Dakotas	Southwest	11/22/2019	1243	rbell	6,839.50

Confirmation Required ✕

Report Modification

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

MISSION GIVING		
	Original Amount	New Amount
PLEDGE TO MISSION	10.00	<input type="text" value="10.00"/>
GIFT TO MISSION	12.00	<input type="text" value="12.00"/>
GIFT IN MEMORY	0.00	<input type="text" value="0.00"/>
WORLD THANK OFFERING	0.00	<input type="text" value="0.00"/>

Project	Fundraising Initiative	Amount	Actions

Apply the A&MD only to Pledge To Mission?

\$

Mission Giving Total

This amount needs to appear on the printed version (PDF) of the remittance transaction:

Remittance Form					
Remittance Number	3355	Date	09/29/2014		
Conference	Northern Illinois	Period From	09/29/2014	To	09/29/2014
District					
Check Number	Total Amount				\$22.00

Projects		
Project Name	Notes	Amount
MISSION GIVING		
PLEDGE TO MISSION		\$10.00
SPECIAL MISSION RECOGNITION		\$0.00
GIFT TO MISSION		\$12.00
GIFT IN MEMORY		\$0.00
WORLD THANK OFFERING		\$0.00
SUPPLEMENTARY GIFTS		

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:

PIN	Cost	Code
PLAIN - GOLD	\$5	68.J501CR
SAPPHIRE	\$5	68.J502CR
PEARL	\$5	68.J503CR
EMERALD	\$5	68.J504CR
RUBY	\$5	68.J505CR
DIAMOND	\$5	68.J506CR
DOUBLE DIAMOND	\$5	68.J507CR