

# The Recommitment Process

Sometimes a fundraiser may not raise enough money to cover the cost of their participation in your event. We understand that this is quite a delicate situation, and have therefore developed tools you may use to communicate with the fundraiser and possibly charge them the difference (or some other defined amount).

## Enabling Recommitment

For instructions on enabling the Recommitment feature, please click [here](#).

## Auto Responders


These are the recommitment email auto responders, which are automatically sent upon recommitment actions (be sure to customize them before using the recommitment process):

- Recommitment Request
- Recommitment Confirmation
- Recommitment Charged
- Recommitment Charge Failed

## The Recommitment Process

Recommitment can be done per user or can be done for many users in bulk.

### To recommit individual registrants, follow these steps:

1. Log in to the Admin at [admin.rallybound.com](http://admin.rallybound.com)
2. Locate the relevant registrant's record (under People > Registrants, or by searching)
3. **Step 1: Request Recommitment:** At the top of the window, click "Request Recommitment" (under the "menu" dropdown: ) , and confirm. At this point—
  - a. The registrant is sent the "Recommitment Request" auto responder
  - b. The registrant's recommitment state is changed to **Pending** (in their registrant record and under the Recommitment column in the People > Registrants tab)
4. **Step 2: Registrant Submits Payment Information:** The auto responder directs the registrant to submit their payment information, which is captured and held by your payment processor. Once the registrant submits their payment information—
  - a. The "Recommitment Confirmation" auto responder is emailed
  - b. The registrant's recommitment state is changed to **Card on File**
5. **Step 3: Charge Recommitment:** When you're ready to charge the registrant, locate the relevant registrant record, and at the top of the window, click "Charge Recommitment". You will be asked to enter either a maximum charge amount\* or a specific amount\*\*. Enter your desired amount and confirm. Once this is done—
  - a. The registrant's card on file is charged
  - b. The "Recommitment Charged" auto responder is sent
  - c. The registrant's recommitment state is changed to **Charged**
6. If the charge is not successful—
  - a. The "Recommitment Charge Failed" auto responder is emailed
  - b. The registrant's recommitment state is changed to **Charge Failed**.
  - c. To recharge the registrant, follow Step 3 above. To resend the "Recommitment Request" auto responder, the registrant's recommitment status must be manually changed to either "None" or "Pending". This is done by clicking "Edit" on the registrant's record and changing their Recommitment State.

### To recommit for multiple registrants at once, follow these steps:

1. Log in to the Admin at [admin.rallybound.com](http://admin.rallybound.com)
2. Navigate to People > Registrants
3. **Step 1: Request Recommitment:** Select the registrants to whom you'd like to send the "Recommitment Request" auto responder.
  - a. This is done in one of two ways:
    - i. Select all the relevant registrants manually by checking the checkboxes to the left
    - ii. Filter the list to include only those to whom you'd like to send the recommitment request. Using this option, you can set parameters to determine whether a registrant will be included. For example, the list can be filtered to include only those registrants who have raised under \$500. *Note: by default, the recommitment request will only be sent to eligible registrants, excluding non-fundraisers and those whose recommitment state is "Card on File", "Charged", or "Charge Failed". It will be sent to registrants whose recommitment state is "Pending".* Click "Mass Action" > "Request Recommitment" in the top of the window.
  - b. At this point—
    - i. The "Recommitment Request" auto responder is sent to the relevant registrants
    - ii. The recommitment state is changed to **Pending** (in their registrant record and under the Recommitment column in the People > Registrants tab).
4. **Step 2: Registrant Submits Payment Information:** The auto responder directs the registrants to submit their payment information, which is captured and held by your payment processor. Once each registrant submits their payment information—
  - a. The "Recommitment Confirmation" auto responder is emailed to them
  - b. The registrants' recommitment state is changed to **Card on File**

- 5. Step 3: Charge Recommittment:** Each registrant may be charged individually by following Step 3 in the instructions above, or multiple registrants can be charged at once.
- Select all the registrants you'd like to charge in one of two ways:
    - Select all the relevant registrants manually by checking the checkboxes to the left
    - Filter the list to include only those to whom you'd like to charge. Using this option, you can set parameters to determine whether a registrant will be included. For example, the list can be filtered to include only those registrants who have raised under \$500. *Note: by default, the charge will only apply to registrants whose recommittment state is "Card on File" or "Charge Failed".* Click "Mass Action" > "Charge Recommittment" in the top of the window.
  - Enter a maximum charge amount and confirm. Once this is done—
    - The selected registrants' card on file is charged
    - The "Recommittment Charged" auto responder is sent
    - The registrants' recommittment state is changed to **Charged**
- 6.** If the charge is not successful for any of the registrants—
- The "Recommittment Charge Failed" auto responder is emailed to the affected registrants
  - The affected registrants' recommittment state is changed to **Charge Failed**.
  - To recharge the registrant/s, follow Step 3 above. To resend the "Recommittment Request" auto responder, the registrant's recommittment status must be manually changed to either "None" or "Pending". This is done by clicking "Edit" on the registrant's record and changing their Recommittment State.

Requesting and charging recommittment for multiple registrants can also be initiated from the Registrants with Reg Fields, Donation and Contacts Summary Report. To do so, first filter the report as desired, then click "Recommitt" and choose either "Request Recommittment" or "Charge Recommittment", and follow the ensuing flow.

\* With the Maximum Charge Amount, the registrant is charged the difference between the amount entered and the amount raised by the registrant (for example, if the registrant raised \$500 and the maximum charge amount is \$750, the registrant will be charged \$250).

\*\* The Specific Amount is charged as entered.

