How to create a donation campaign?

Omar S. - 2024-09-19 - Donations

Donation Campaigns are used to collect donations for different projects. To create a new Donation Campaign:

1. Click **Settings** or the **Gear** icon on the left menu.
2. Click the **E-Commerce & Financial** tab.
3. Click the **Donation Campaigns** link in the **Donations** section.
4. On the Donation Campaign List page, click the **Add** button.
5. On the Add Donation Campaign page, you will have these options:
    - **General Donation Settings**
        - **GL Account** - A drop down menu which allows you to select which GL Account receives the donated funds.
        - **Title** - The title of the Donation Campaign page on the website.
        - **Permalink -** The URL of the Donation Campaign. For the example organization.org, the donation campaign will appear as: https://organization.org/donate/**[Permalink]** without the square brackets.
        - **Code -** The donation code. This code will appear in the list of transactions for your online payment processor and GL Account.
        - **Description -** Description of the Donation Campaign.
        - **Image** - Click **Choose File** or **Browse** to select an image for the Donation Campaign.
        - **Display Options** - Control what data is displayed on the Donations Campaign list page and the Donation Campaign page.
            - **Show total donation amount -** Shows total funds received from all donors on the Donation Campaign's public page.
            - **Show total number of donors** - Shows the total number of donors on the Donation Campaign's public page.
            - **Show on public donations page** - Shows the Donation Campaign on the Donations List page.
            - **Allow Comment** - Allow the donor to comment when they donate.

- **Available Amounts** - The preset donation amounts separated by commas, e.g., 10, 25, 50.
- **Allow Free Form Amount -** Checking this option allows a donor to submit their own custom amount.
    - **Minimum Amount** - If **Allow Free Form Amount** is enabled, enter the minimum amount a Donor can submit.
- **Payment Account** - Which payment account will process and receive the funds.
- **Add Service Fee to donations from this campaign** - Allows the ability to add a percentage and fixed service fee to donation transactions within the selected donation campaign.
- **Allow Pay By Check** - If the donor is allowed to pay by check.
    - **Pay By Check Instructions** - Use this textbox to enter the check instructions for the donor. For example your organization's mailing address and whom the check should be made out to.
- **Use Custom Confirmation Message** - Allows you to create your own Confirmation Message, instead of using the default system message.

- **Donation Notifications** - Allows the system to send a confirmation email to the donor after the donor made a donation.
    - **Donation Confirmation** - Used to either enable or disable the ability for the system to send an email to confirm the Donor's donation. If enabled, you will have the following options.
        - **Select Template Type** - Select **System** to use the System default Donation Confirmation email template. Select **Custom** to select your own email template.
        - **Select Template** - Use this dropdown to select your own Custom Email Template, or if using the **System** Template Type, select the Donation Confirmation email template.
        - **Select Profile** - Select the Sender Profile that should be used when sending the Donation Confirmation email.

6. Click the **Save** button at the bottom of the page.