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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 <u>own email template</u>.
    - Select Template Use this dropdown to select your own <u>Custom Email Template</u>, or if using the **System** Template Type, select the Donation Confirmation email template.
    - **Select Profile** Select the <u>Sender Profile</u> that should be used when sending the Donation Confirmation email.
- 6. Click the **Save** button at the bottom of the page.