How do I setup and use donations?

David H. - 2024-09-19 - Donations

The Donation module will allows your organization to accept online donations through your website. Features include:

- Complete customization of donation amounts. Allow pre-determined amounts or allow the user to input a custom amount.
- Customization of the confirmation email sent to the donor, as well as the ability to customize who the email is sent from and where replies should be directed.
- Fully integrated online payments, which allows for reports of donations and the ability to export the data in an Excel (CSV) format.
- Customized donation page based on the settings that have been configured within the module ensuring that donations can start to be accepted quickly and easily through the website.

In order to get started the module will need to be configured on the donation settings page.

Donation Settings

1. Click **Settings** or the **Gear icon** on the left menu.
2. Click on the **E-Commerce and Financial** tab.
3. Click the **Donation Settings** link in the **Donations** section.
4. This brings you to the Donation Settings page. From here you can review the donation settings to ensure they are correct. If you need to change any of the settings you can click on the **Edit** button to edit them.
5. After you click the **Edit** button, you will see the following fields:
    - **GL Account** - A drop down which allows you to select which GL Account receives the donated funds.
    - **Donation Listing Description -** The description which displays on the "Donations" page on the website. Eg. https://domain-name/donations.
    - **Title -** The title of the donation page on the website.
    - **Code** - Marks donation transactions within the integrated payment account's transactions report. The code is part of the transaction number.
    - **Description** - The description on the donation page.

- **Default Donation Campaign** - Allows you to select the donation campaign used on the donations page. This only displays if you have a Donation Campaign created.

- **Display Options** - These options allow you to control what data is displayed on the Donations Campaign list page and the Donation Campaign page.

    - **Show total donation amount** - Displays the total donation amount received.

    - **Show total number of donors** - Displays the total number of donations made.

    - **Allow Comment** - Allow the donor to comment when they donate.

- **Available Amounts** - The preset donation amounts. Each donation value has to be separated by a comma (,). Example: 10, 25, 50.

- **Allow Free Form Amount -** Allow users to input any custom donation amount, e.g,. $17 dollars.

- **Minimum Amount** - The minimum donation amount.

- **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** - Allow donor to pay by check.

- **Pay By Check Instructions** - 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.

- **Levels** - Allows you to set certain donation levels. Eg. Gold, Silver, etc. New ones can be added by clicking on the **Add** button.

    - **Title** - The title of the donation level.

    - **Max Amount** - The maximum range amount of the donation level.

    - **Min Amount** - The minimum range amount of the donation level.

    - **Icon** - The icon for the donation level.

    - **Remove Image** - If there is an icon saved, this option allows you to remove it.

- **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 once done.

Displaying the Donation page

In order to ensure visitors can easily make donations through the website, a direct link will need to be posted. For increased visibility, we recommend adding it to the main menu bar on the website.

There are three types of pages for donations. The donations setup must be complete in order to view these pages.

- https://domain-name/donate
- https://domain-name/donations
- https://domain-name/donate-campaign-permalink

To ensure the donate link stands out even further, we also recommend setting the menu link style to **Primary Button** or **Secondary Button**.

How to use the donate page

1. Open the donate page (https://domain-name/donate).
2. Select the donation amount you wish to donate.
3. Click the **Donate** button.
4. Enter in your personal and payment information. If you are logged in, the system will automatically fill in your personal information.
5. Select the **Submit** button.
6. After submitting the donation, you will see the confirmation message and you will receive a confirmation email shortly (if you have donation notification enabled).