Integrating a Holiday Donation Appeal into Your Web Site

User Brief

EM-DU-HDA-UB-1.0

Adding a Holiday Donation Appeal to Your Web Site

Year-end holidays are a crucial time for fundraising, with nearly one-third of all donations occurring in December and 12 percent of all donations occurring in the last three days of the month. This document contains instructions to set up a holiday donation appeal on your web site.

Overview

The general steps for creating a donation appeal are the following:

- Create a form for the donation appeal
- Set up a Dues event and assign the form to the event
- Test the donation appeal and make any necessary changes before making it visible to the public

Before You Start

Before you start creating the donation appeal, you should:

- Prepare the content of the donation appeal
- Decide on the donation amounts that you will ask for
- Decide whether you will allow customers to enter their own donation amounts

Setting Up the Donation Appeal Form

Follow the steps in these sections to set up the form for the donation appeal. This form contains your donation appeal and options for different levels of support.

WARNING: A donation appeal must be a one-page form. If you add additional items to the donation appeal form, they must all appear on the same page.

In the following illustration, all of the displayed text describes where the information was entered. This will help you understand how the text you enter in different parts of the form will be displayed to the customer. In this example, custom buttons are displayed for the customer to decline or agree to donate. Instructions on creating custom buttons are located at the end of this document.

Sample holiday donation appeal

Getting Started

To set up a form for a donation appeal, follow these steps:

1. In EVENT MANAGEMENT, click the **Forms** tab. The FORMS page will be displayed.
2. Click **New Form**. The CREATE FORM page will be displayed.
3. In the FORM TITLE field, enter a name that identifies the form as the donation appeal. The title is visible to Doubleknot administrators but will not be displayed to customers.
4. Click **Submit**. The form management page for the form will be displayed.

Entering the Contents of the Donation Appeal

To enter the contents of the donation appeal, follow these steps:

1. In the MANAGEMENT section, click **Edit Form.** The ADD ITEM TO PAGE options will be displayed.
2. In the ITEM TYPE pop-up menu, select **HTML**. A rich text editor window will be displayed on the page.
3. In the editor window, enter or paste the descriptive information for your appeal. Use the editor's text formatting text and support for graphics to create a visually appealing page.
4. At the bottom of the page, click **Submit**. The EDIT FORM page will be displayed.

Specifying Donation Amounts

To set up the donation amounts, follow these steps:

1. Beneath the PAGE 1 heading, click **Add Item to Page**. The ADD ITEM TO FORM page will be displayed.
2. In the ITEM TYPE pop-up menu, select **Radio Buttons**. The page will update to display options for radio buttons.
3. In the QUESTION TEXT field (in the Question/SubText section), enter text that describes what the customer should do—for example, "Please select a gift amount:"
4. For each donation amount option that you wish to configure, follow these steps:
   - In the ANSWER TEXT field, enter the description of the gift amount. For example, if your organization assigns names to donation levels, enter the name.
   - In the COST (IF APPLICABLE) field, enter the dollar amount of the donation.
   - In the OTHER OPTIONS section, in the ANSWER LAYOUT STYLE pop-up menu, select **Vertical**.
5. Choose one of the following:
   - To allow donors to enter a different donation amount, follow the steps in the next section, Allowing Customers to Enter a Donation Amount.
   - To require donors to choose one of the preset amounts, click **Add Item** and go to the section titled Creating the Donation Appeal Event.

   NOTE: We strongly recommend providing the option for donors to enter their own donation amount.

Allowing Customers to Enter a Donation Amount

To allow customers to enter the donation amount of their choice, carefully follow these steps:

1. In the OTHER OPTIONS section, click the checkbox to the right of "Allow Other"?
2. In the "OTHER" TEXT field, enter the description that will be displayed next to the option (such as "Other Gift Amount:"). This will be displayed in the same way as the text you entered in the ANSWER TEXT fields for the preset donation amounts.
3. At the bottom of the page, click **Submit Changes**. The item will be added and the EDIT FORM page will be displayed.
4. Beneath the Page 1 heading, click **Add Item to Page**.
5. In the ITEM TYPE menu, select **Variable Cost Display Text**. The page will update to display options for this type of item.
6. In the COST DISPLAY OPTIONS section, follow these steps:
   - In the DESCRIPTION field, enter a description for the option. This text is not displayed to customers.
   - In the LINE ITEM DESCRIPTION field, enter text for the option to be displayed to the customer, such as "Enter a custom gift amount here."
   - In the COST field, enter **1**. (The actual donation will be for the amount that the user enters.)
7. In the OTHER OPTIONS section, in the LINK TO OTHER ITEMS menu, select the name of the item for the radio buttons you created for the preset gift amounts.

NOTE: You must perform this step to allow customers to enter a custom donation amount in the field.

8. In the REPORTING LABEL field, enter a short description to use at the column heading for this item in reports. (If you leave this blank, all the text of the LINE ITEM DESCRIPTION will be displayed in the column heading.)
9. At the bottom of the page, click **Add Item**. The item will be added to the form and customers will be able to specify donation amounts if they wish.
10. At the bottom of the page, click **Continue**.
11. On the following page, click **Done**.

Creating the Donation Appeal Event

To create the dues event for the checkout donation request, follow these steps:

1. In EVENT MANAGEMENT, click the **Dues** tab.
2. At the right side of the page, click **New Dues**. The CREATE AND MODIFY A DUES CAMPAIGN page will be displayed.
3. At a minimum, the following items must be configured:
    - In the DESCRIPTION field, enter a name. This will not be displayed to customers.
    - In the CAMPAIGN BEGIN DATE and END DATE fields, enter or select the beginning and end dates for the checkout donation request campaign.
    - In the COST IS PER section, select **Registration (Skip Individual Registrants)**.
    - Scroll down the page to the SKIP REGISTRATION DETAILS pop-up menu, and select **Yes**.
    - In the PAYMENT TYPE section, select **Pay Online or By Mail**. This will ensure that the donation request is displayed correctly for any kind of customer purchase.
    - In the DEPOSIT PAYMENTS INTO menu, select the account where the funds from this donation request should be deposited.
4. At the bottom of the page, click **Save**. The Dues event will be created.

Attaching the Form

To attach the form to the event, follow these steps:

1. In the DUES tab, click the name of the event for the donation appeal. The MANAGE EVENTS page will be displayed.
2. At the left, click **Assign Forms**. The ASSIGN FORMS page will be displayed.
3. In the FORM: menu, select the form you created for the donation appeal.
4. Click **Assign**. The form will be attached to the event.
5. At the bottom of the page, click **Done**.

Testing the Donation Appeal

Before you publish the link to the donation page, you must test the request to make sure that the form is displayed correctly. To test the donation appeal page, follow these steps:

1. Display the MANAGE EVENTS page for the donation appeal.
2. Beneath the description of the event, select and copy the URL of the event.
3. Launch a different Web browser in which you are not logged in to Doubleknot. For example, if you are logged in using Internet Explorer, launch Firefox or Chrome.
4. Paste the URL into the address bar of the browser, and press **Enter**. The donation appeal page will be displayed.
5. Make sure that all of the text, pictures and options on the page are correct.
6. If needed, make changes to the form and test the donation appeal again.

When you are satisfied with the donation appeal, you can publish and promote the URL on your web site, in emails, in social media or anywhere else you choose.