**Donation Forms**

**Quick Start Guide**

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| **Donation Forms provide a secure online system to accept and process donations using the Harris Connect secure servers. An unlimited number of unique donation forms can be created. Summary and detailed custom reports can be generated.**  |

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| **Creating and Managing a Donation form will include some or all of the following steps:** |

**Choose a default template and name the Donation Form:** Each form requires a unique name

**Edit Donation Form Pages to include all donation information:** Create and/or modify each line that will appear on the donation form

**Edit Thank You Page and Confirmation Email:** Customize or use the default pages
**Edit Donation Form Configuration criteria**: Activate the donation form and set up processing details

**Preview and test a donation**: Ensure the donation displays and calculates correctly prior to going live

**Create Donation Reports:** Create custom reports to capture available information

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| **General Donation Form information** |

**Basic Donation Form Structure**

1. Each form is composed of at least one page containing donation-related items, a Thank You Page that appears on screen once the donation has been completed, and a Confirmation Email that is sent to the email address provided by the donor.
2. Each donation page is composed of multiple sections, for example: Introduction, Gift Information, Payment Information, etc.
3. Each section is composed of multiple components, for example: Donation Description Text, Billing Street Address, Appeal Code, etc.
4. Additional pages can be added to the form.
5. Additional sections can be added to pages.
6. Additional components can be added to sections.
7. Additional alternate Thank You Pages and Confirmation Emails can be created.
8. When only one donation amount is collected on a form then that is the amount that will be sent to the Payment Gateway for credit card processing. When more than one donation amount is collected on a form confirm that they are all included in the total amount sent to the Payment Gateway for credit card processing.

**Basic Donation Requirements if more than one donation option will be offered to donors**

1. A custom component must be created for each additional option
2. A Total Billable Amount custom component must be added to the page to calculate the total amount to be sent to the Payment Gateway for credit card processing.
3. Edit the Total Billable component to select the components to be used for calculating the total amount.
4. Select the new Total Billable Amount as the Billable Component in the Payment Processing tab.
5. All gift amount fields and the total billable amount field MUST be placed on the same Page; they CANNOT be distributed across multiple pages.

**Basic Form use:**

1. Use the Hide option for pages, sections and components not currently in use. Do not use the Delete option, as deleted items are difficult to restore.
2. Plan the donation form details and layout on paper prior to building online to save time and effort. Determine the Pages, Sections and Components required.

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| **Begin here: Logon to Administration Center** |

1. Log on to your Administration Center web site.
2. You will be prompted for your UserID and Password. For security purposes, three failed attempts to log in correctly will lock your account for up to 2 hours.
3. The screen will refresh with the Administration Center landing page.
4. Click **Forms Management>Donations>Create/Manage Donation Forms** (Note: If the Donations or Create/Manage Donations option is grayed out, this means you do not have proper access to this particular application. Contact your community administrator or your Client Relations Manager.)

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| **Step 1: Choose a default template and name the donation** |

**Create a new donation form:**

1. Select the default template.
2. Enter a donation form name and short description (these fields are seen only in the Admin Center) and click Create this form.
3. Once the new donation form appears at the top of the Donation Forms list, click the Edit link to begin customizing the form.
4. Choose the top white tab Edit Form Pages tab and the Page 1 blue tab.
5. To view the default format of the donation form, click the Preview Page (Customer View) button.

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| **Step 2. Use Visual Edit to customize donation details**  |

**Visual Edit mode allows admins to edit form layout and components visually, directly on the form. Using Visual Edit is not required but should be considered for modifying much of the form.**

1. On the Page tab, click the Visual Edit Mode button.
2. The donation form will appear in a new window.
3. Mouse-over the various components on the form. Any components that display highlighted in yellow can be edited.
4. Double-click on the component to be edited; a content box will appear. If the component supports html code the WYSIWYG editor will appear. If the component supports only plain text then the text editor will appear.
5. Make changes, click Save changes.
6. Items not customized using Visual Edit can be edited using the components Properties page.

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| **Step 3: Add and/or edit Page, Section and Component to include all donation information** |

**To add a Page:**

1. Locate at the top of each Page the button named “Create a new page”. Click on button. A new Page tab will display.
2. Remember that when offering multiple donation options those options and the total billable amount field must all reside on the same page. Additional pages can be used for displaying or collecting non-donation-item information.

**To add/edit a Section to a Page:**

1. Locate at the bottom of each Page the header “Add a new section to this page:”
2. Enter section name, placement, and click Add Section.
3. Click on Edit link beside section name.
4. New sections will include a section header title bar that may be edited. Additional sections are often added to collect specific information or to enhance the visual display of the form components.

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| **Default sections that may be included in each donation:**  |
| Introduction | Displays this text: Please complete the following information. Required fields are marked with an asterisk (\*) |
| Java Script | Not for general use |
| Registered Member Prompt | Allows members to log in so that profile data is auto-filled |
| Personal Information | Captures Name, Email, Class Year, etc. |
| Billing Address | Captures Billing Address information |
| Home Address | Captures Home Address information |
| Gift Information | Captures Gift amount(s), Designations, Appeal Codes, Matching Gift, etc.  |
| Payment Information | Captures Credit Card processing information |
| Confirmation | Displays this text: Please check your information carefully for accuracy, and then click “Submit” |

**To add/edit a Component:**

1. Locate at the bottom of the Components Page the heading “Add a new component”
2. Choose the appropriate Custom Component.
3. Enter the label for display.
4. Enter the field identifier for the database. Identifier must be composed of letters, numbers and/or underscores (\_).
5. Indicate placement on page.
6. Click Add Component.
7. The component will be added to the list of components; click Edit next to the newly added component to enter additional information.
8. Components are used to add descriptive or instructional information, capture order quantities, etc.

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| **Custom Components that may be included in each donation:**  |
| **Component** | **Uses** |
| Text Input (Single Line)\* | To collect a single line of free-form input, either text (honoree’s name), monetary (amount of donation) or quantity of an item associated with a cost (number of raffle tickets for a prize) |
| Text Input (Multi Line) | To collect multiple lines of free-form input, upto 1000 characters |
| Checkbox | To select one or more options of a limited number of choices  |
| Radio Button List | To display multiple options when only one option can be chosen. Data can be text, numeric, price or quantity |
| Display Field | To display informative (plain) text or instructions  |
| Display Field (Custom HTML) | To display informative HTML text or instructions  |
| Display Field (Date/Time) | To display a pre-set date |
| Dropdown Menu (Custom) | Selections determined by admin; user can choose one or many options |
| Dropdown Menu (States/Provinces) | Pre-defined menu of states/provinces; can be edited |
| Dropdown Menu (Countries) | Pre-defined menu of countries; can be edited |
| Dropdown Menu (Years) | Pre-defined menu of years (use to collect Class Year), can be edited |
| Dropdown Menus (Credit Cards, Month, Expiration Years, Start Years) | Pre-defined menus; can be edited |
| Calendar Date | Calendar Date selectable by registrant |
| Total Billable Amount | Total charges sent to payment processor |

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| **Step 4: Edit Thank You Page and Confirmation Email** |

**Thank You Page**

1. Click on Thank You Page tab.
2. Click on “Preview this page” button.
3. If this page meets requirements no additional work is required.
4. If this page does not meet requirements additional alternate pages can be created and additional data tags can be added to the content.

**Confirmation Email**

1. Click on Confirmation Email tab.
2. Do not disable Confirmation Email(s) unless circumstances require. Donors should always receive an email confirmation of their donation.
3. Customize the Email Sender & Subject text.
4. Enter Blind Copy email addresses to send a copy of all donation confirmations to a staff member or other email box.
5. Click on “Preview Confirmation Email”. If this page meets your requirements then no additional work is required.
6. If this page does not meet your requirements, additional alternate confirmation emails can be

created and additional data tags can be added to the content.

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| **Step 5: Edit Form Configuration criteria** |

**Click on Edit Form Configuration tab**, then click on the following sub-tabs:

**Activation:** Forms must be Activated in order to accept and process donations

**Payment Processing:**

* Payment Processing Type ~ required
* Billable Component ~ required ~ use default if no other billable component has been added to the donation
* Currency ~ default is US Dollar
* Credit Cards ~ required unless No Payment Processing option is activated.
* Merchant ID ~ required unless No Payment Processing option is activated
* Processing Server ~ required ~ ALWAYS choose TEST until form goes live then switch to PRODUCTION
* Additional Payment Options ~ use this if you will accept other forms of payment either online or when an admin enters donations via the User Order Entry tool.

**Special Features & Functions**

* All features on this page are optional.
* Order Discount ~ Be sure to enable if refunds or cancellations will be offered.

**Campaigns**

* If this donation is to be associated with a Campaign, select from options on this page.

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| **Step 6: Preview and test the donation prior to Activation:** |

**All donation forms and reports should be tested prior to going live. These steps should be followed during the testing phase:**

1. Activate the donation (**Edit Donation Configuration>Activation**).
2. Confirm that the Processing Server to TEST server so that credit card functionality can be tested. For Cybersource gateways, use this test card: VISA, Card #4111111111111111, CVN: 123, Exp date: enter any date greater than day of testing (**Edit Donation Configuration>Payment Processing>Processing Server**).
3. Use small dollar amounts when testing.
4. Enable Confirmation Email(s) so that admin can verify information as it will be displayed in email confirmation that will be received by donors (**Edit Donation Pages>Confirmation Email**).
5. Test all order variations to ensure proper functioning.
6. When donation is ready to go live reverse item 2 above and replace Processing Server with Production server.

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| **Step 7: Create Donation Reports**  |

1. Click on Reporting>Donation Reports
2. Select Donation Form Name, choose either Detailed or Summary Report.
3. Select Date Range.
4. For Detailed Reports, choose fields to be reported on Select Report Criteria tab.
5. Click Display Report tab to see results on screen.
6. Download report to txt or csv format using buttons at bottom of screen.
7. For future use of same criteria assign a name to the query and enter into Save This Query box.