Process Donation User Guide

User Manual

Created: Friday, May 19, 2017

Help Site

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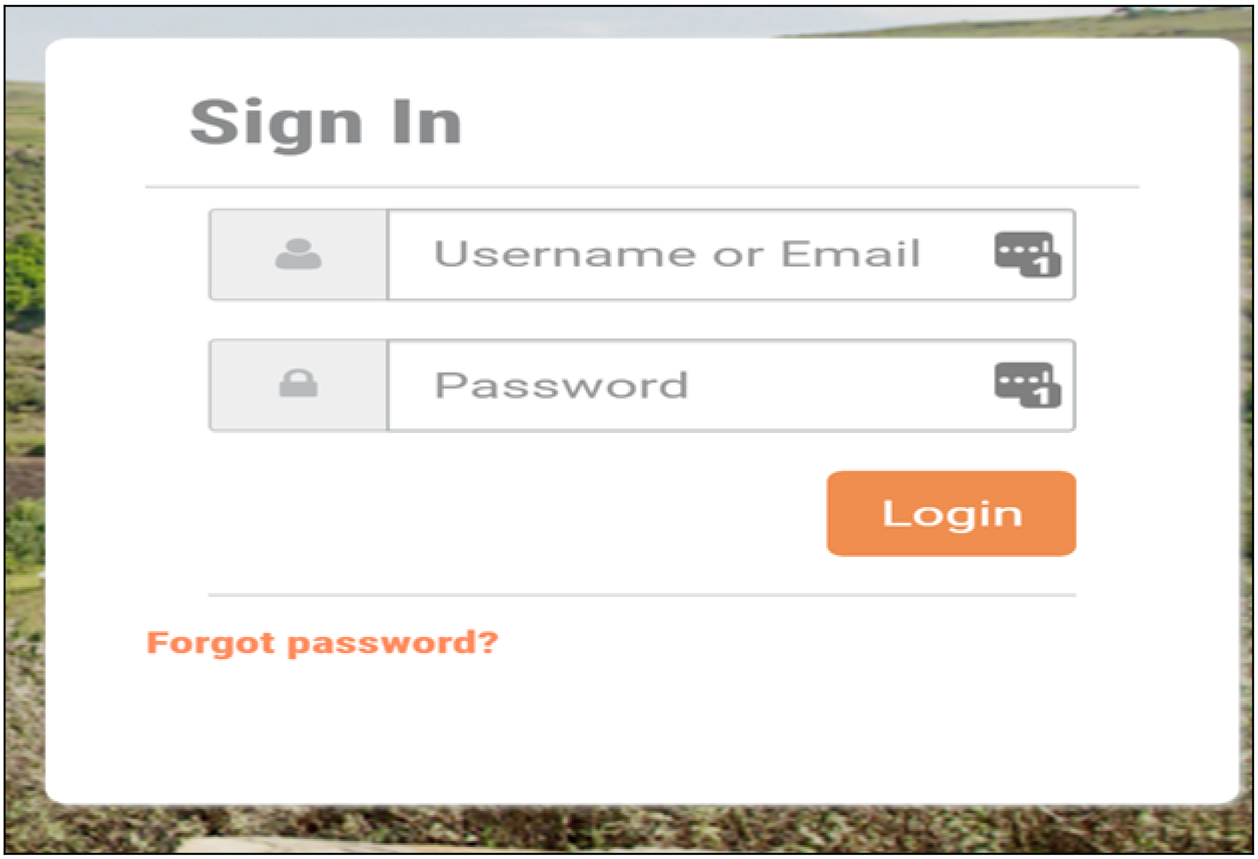
LOGGING ON

Once you have finished signing up you will receive an email with instructions on how to log into Process Donation for the first time. The instructions will inform you to go to https://portal.processdonation.org/ and input your email address and the password you created during Step 1 of the sign-up process. The login screen that will allow you access to our Management Portal looks like this:



If you click on the **Forgot Password?** link, a password reset email will be sent to your email address. If you do not receive one promptly from us the please check your Spam or Junk folders, or your email filters. All new passwords must be 6-10 characters long and need to include all of the following: A capital letter, a lowercase letter, a number, and a special character (#@! Etc.).

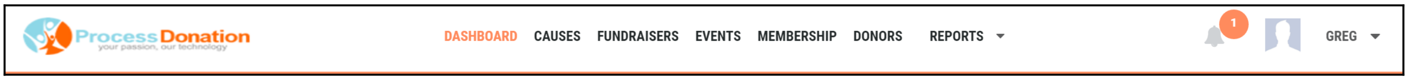
LINK PAYMENTS PAGE

Whether you selected a basic payments page or a custom one, the true value of the Process Donation platform is in integrating your donation acceptance and back office donor management, the first step is to link to your website the payments page you receive from Process Donation. When you choose a Custom Donation Page; including your logo, website images, fonts and sizes, and top / bottom website menu items, you offer your potential donors a seamless experience where your brand and mission are consistently represented and the donor can have confidence in their donation, and easily return to your website and promote their donation on Facebook and Twitter when they are done.

Whether you have a webmaster or use a Content Management System to manage your website's content, simply take the URL link we will email to you and attach it to your website, typically either on a DONATE button or a donation landing page.

NAVIGATION MENU

Across the top of every screen (including the entry screen after logging in) there is a Navigation Menu that can be used to access any and all functions within the Process Donation Management Portal:



Dashboard - shows you a graphical representation of both Donations by count and by dollar amount, by Cause, and over a period of time that you can define. (Standard, Premium, & Ultimate)

Causes - you can raise money attributed to one or many different reasons or programs that your organization may offer and support. This section allows you to describe the Cause in detail and define different giving levels. Through this section you may control how your organization promotes your Causes through our Campaign feature where you can communicate to your donors through email and social media such as Facebook, Twitter, and Google+. (Standard, Premium, & Ultimate)

Fundraisers - are the people that have agreed to help you promote your Causes. This section makes allows you to create a peer to peer fundraising program by creating online crowdfunding pages for anyone that wants to help you raise funds by promoting it within their social circle. Through our Management Portal it is easy to create a page, allow a fundraiser to tailor it to their personality, and invite people and your donors to help promote your Causes. (Premium & Ultimate)

Events - allows you to set a date and time for a gathering to raise awareness and money for your Cause(s). Manage event details, location, and event coordinator along with a robust ticketing management system, including a mobile app to scan attendees tickets at the gate. (Ultimate)

Membership - set-up different Membership levels and collect online dues (and donations!) on a recurring basis. Send out reminder emails and collect information. (Premium & Ulitmate)

Donors - a robust customer database that collects demographical information on your donors as well as their activities with your organization. You can take notes, track anniversaries, and manage their connections to other donors. (Ultimate)

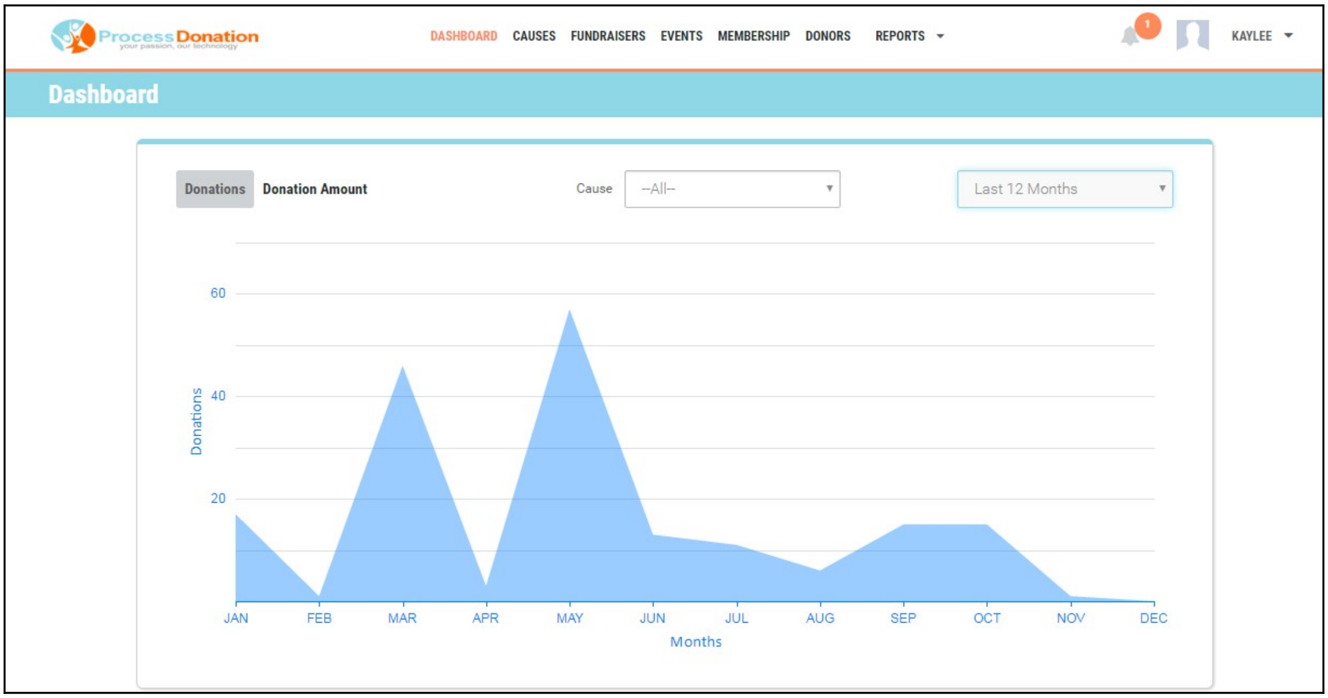
Reports - allows you to track email, manage your IRS letter obligations, and reports on your financial transactions. (Standard & Premium/limited access, Ultimate/full access)

Settings - are under your name in your profile off to the right and that is where you determine when and how Process Donation helps you communicate / email with your donors when they donate, attend events, sign-up for fundraising, etc... (Standard, Premium, & Ultimate)

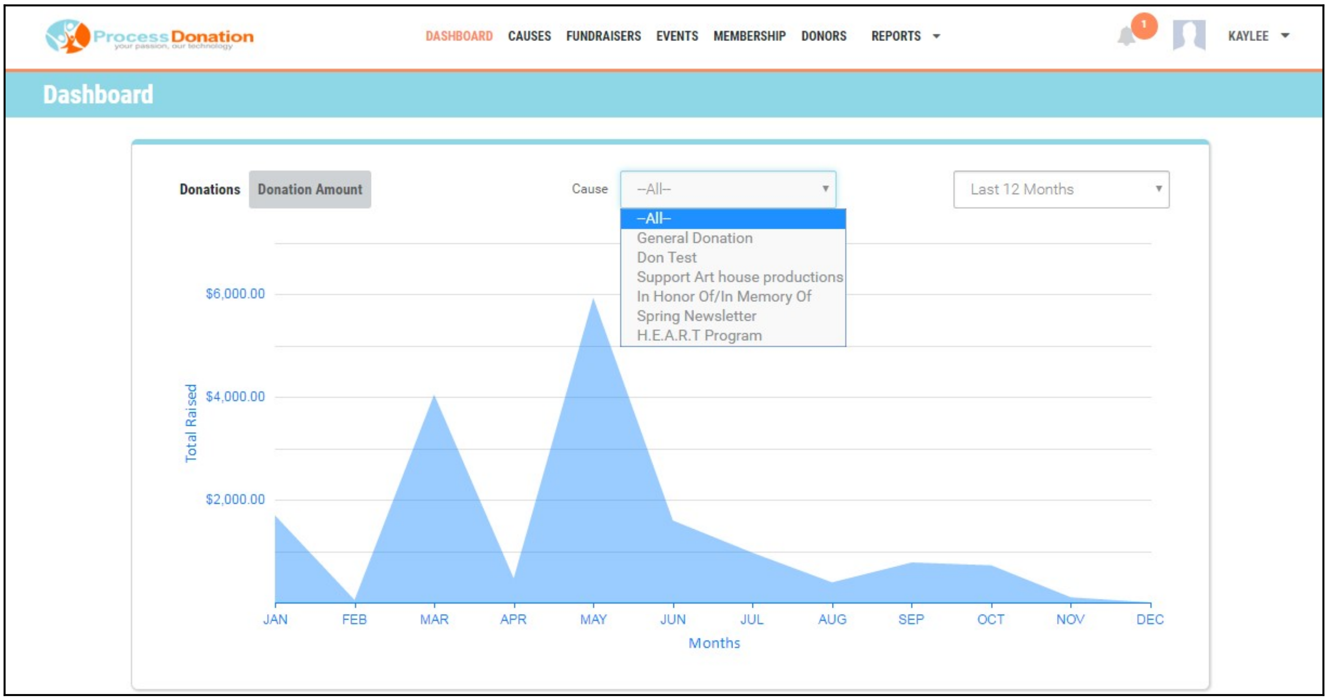
INTRODUCTION TO DASHBOARD

(Standard, Premium, & Ultimate)

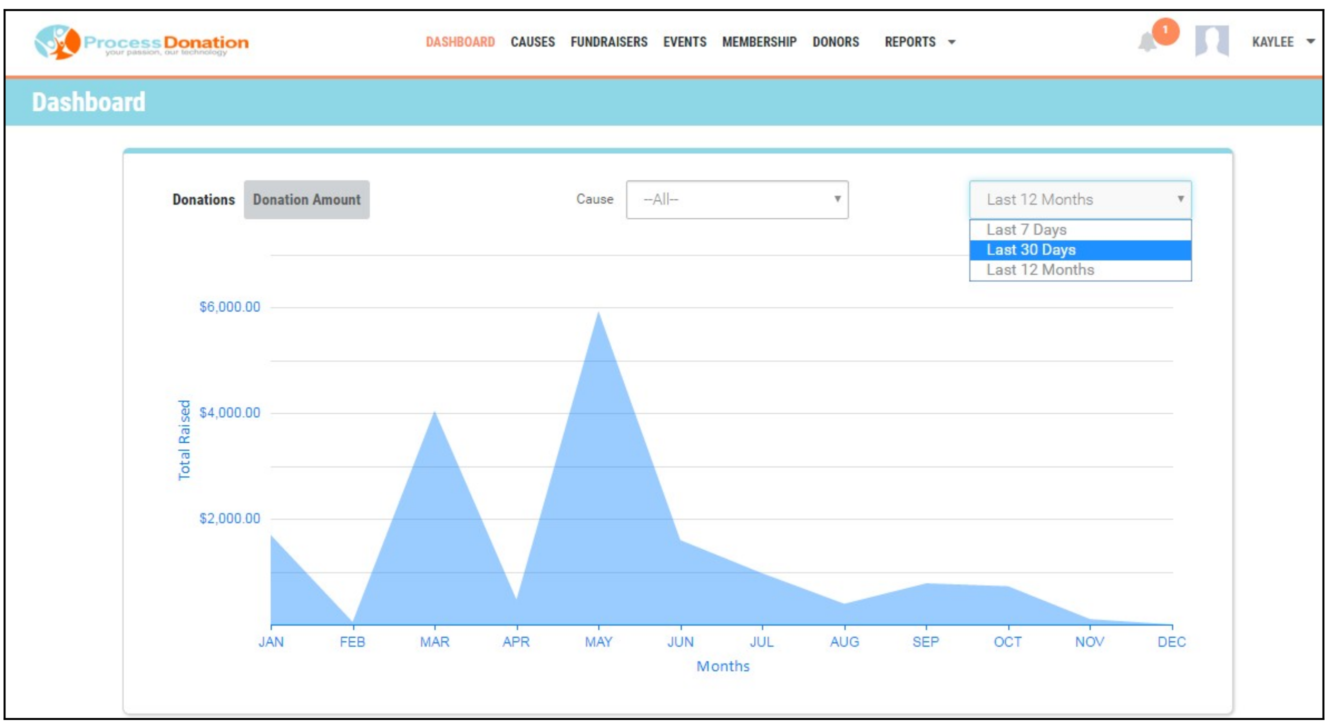
Dashboard is the landing page when you log on and is designed to give you the ability to see a pictorial view of the number of donations and total amount raised.



View all of your Causes or select a particular cause from the drop down option:



You can view your data relevant to a particular time period by selecting appropriate option from the **Last 7 days** drop down:



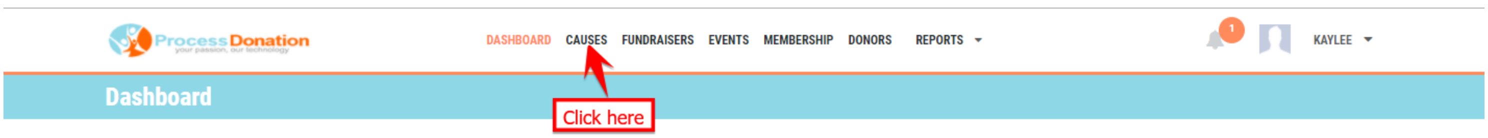
NEXT: Causes

INTRODUCTION TO CAUSES

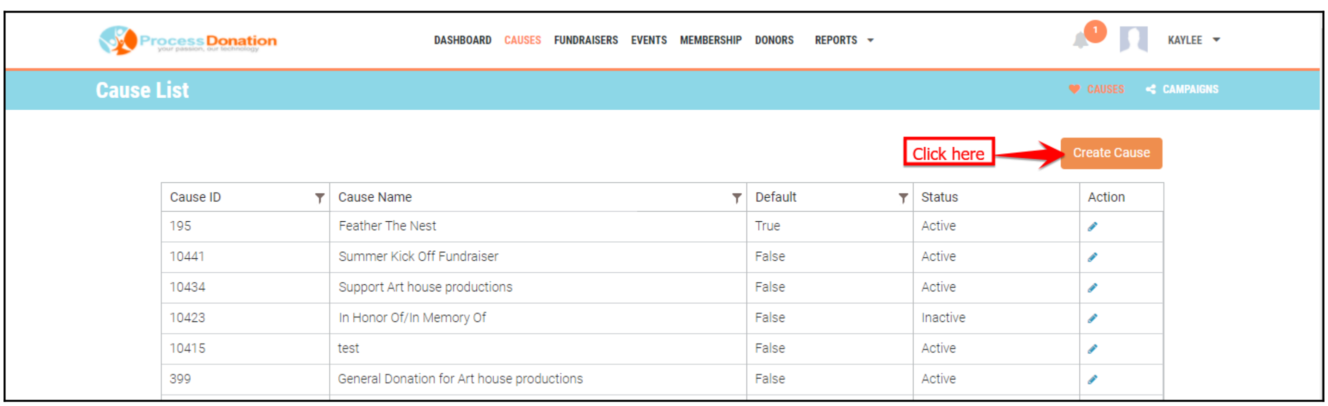
(Standard, Premium, & Ultimate)

Causes allow you to raise money attributed to one or many different reasons or programs that your organization may offer and support. This section allows you to describe the Cause in detail and define different giving levels. Through this section you may control how your organization promotes your Causes through our Campaign feature where you can communicate to your donors through email and social media such as Facebook and Twitter. Causes are designed to give you the ability to raise the donations and collect the donor information.

To access the page simply click on **CAUSES** link in the menu.



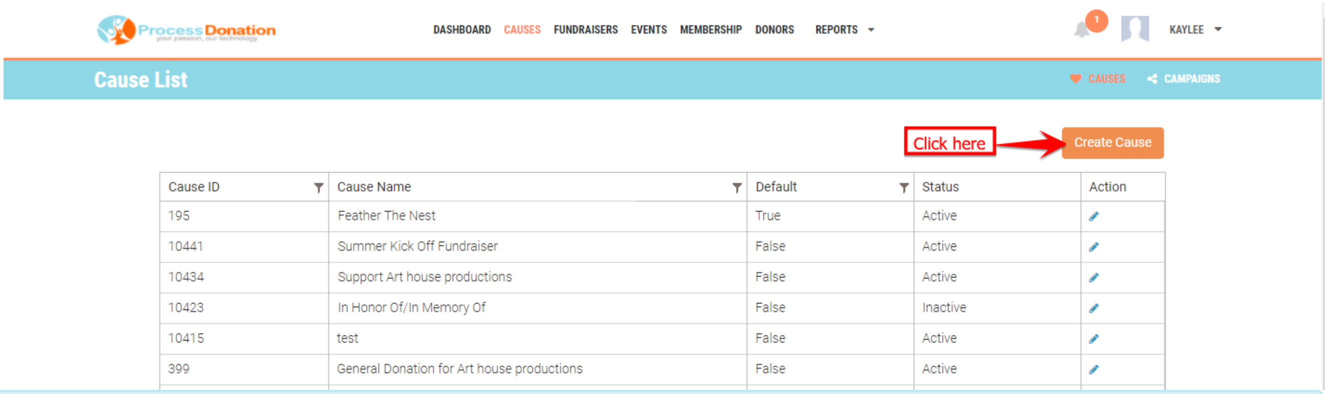
That will display a list of all of your Active and Inactive Causes (as defined by you). From here you can edit an existing Cause under the **Action** column by clicking on the icon or create a new Cause by clicking on the Create Cause icon. Any field that has an icon, can be filtered by clicking on the icon and typing in the value sought and those fields can also be sorted by clicking on the column heading.



NEXT: CREATE / EDIT A CAUSE

CREATE / EDIT A CAUSE

From the **CAUSES** link click on the Create Cause button to create a new Cause.



Cause ID	Cause Name	Default	Status	Action
195	Feather The Nest	True	Active	
10441	Summer Kick Off Fundraiser	False	Active	
10434	Support Art house productions	False	Active	
10423	In Honor Of/In Memory Of	False	Inactive	
10415	test	False	Active	
399	General Donation for Art house productions	False	Active	

From there you will be asked to enter information to build out your Cause for inclusion on a Process Donation hosted payments page for you to put on your website to collect donor demographics and credit / debit card information, banking for ACH payments, or to indicate a cash or check donation. For the page, please provide the following:

Cause Name - Provide a name for the reason you are raising money.

Cause Description - Provide a brief description about the Cause to communicate with your donors.

Giving Levels - You can pre-define levels for your donors to choose from; they may have a special meaning you can communicate in the **Title** field and further describe in **Description**. Click on the icon to remove a Giving Level or **Add Another Amount** to include more Giving Levels.

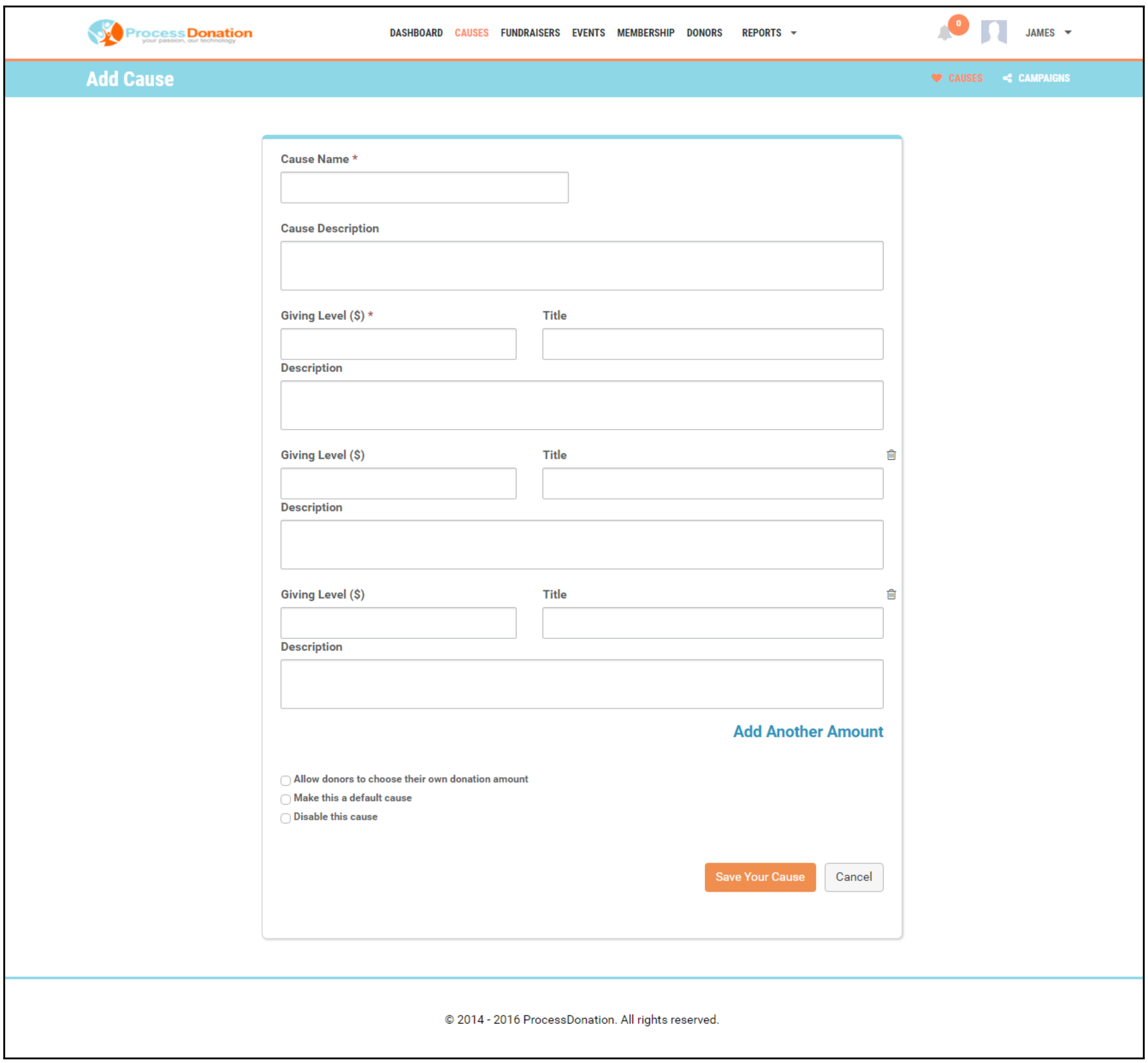
Additionally, you have the following options that you can manage at the Cause level (all Causes do not have to be treated the same):

[Allow Donors to choose their own donation amount] - In addition to your Giving Levels, you can allow your donors to input any amount they are comfortable donating.

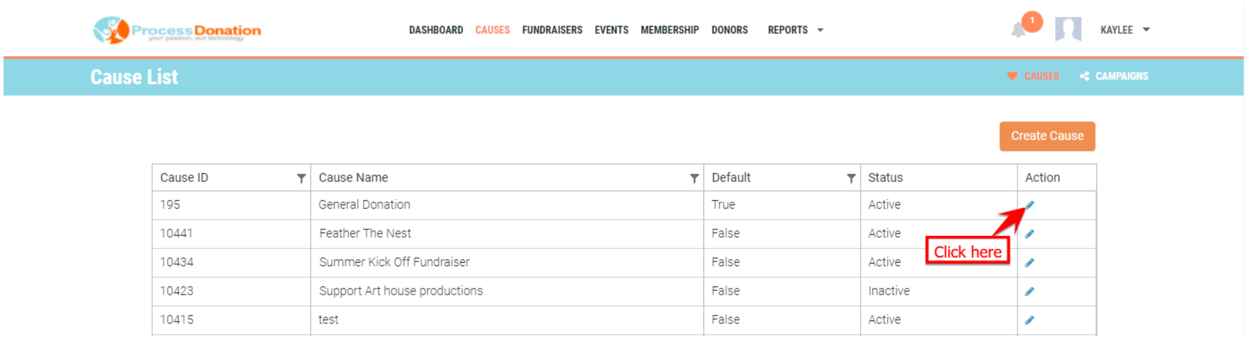
[Make this as default cause] - Check this box if you want this Cause to be the default one shown on your donation page.

[Disable this cause] - Check this box to disable the Cause and make it Inactive.

⚠ The creation of a new Cause or the changes to an existing Cause will not be applied to your Process Donation hosted payments page on your website until you click on the Save Your Cause button.



You can edit an existing Cause by clicking on the icon next to the Cause you would like to edit and you will be routed to a page similar to the Create Cause.



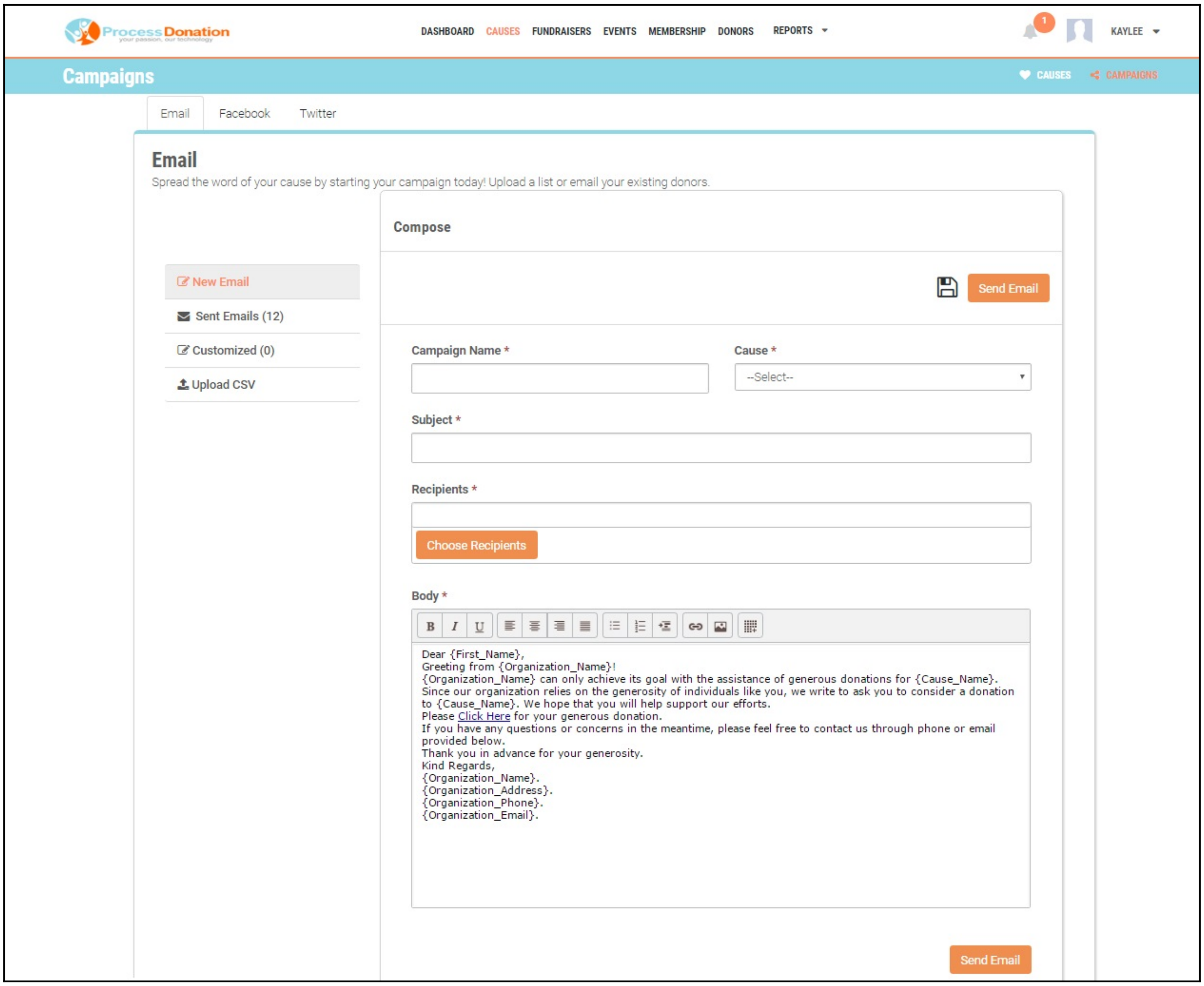
NEXT: CREATE A CAMPAIGN **PREVIOUS: INTRODUCTION TO CAUSES**

CREATE A CAMPAIGN

We provide an option for you to create Campaigns to proactively reach out to your donor base via email marketing and to a larger crowd by posting your efforts on Twitter and Facebook, allowing your followers to repost your custom built secure donation page URLs to anyone interested in contributing to your efforts. With this route you have the possibility of your message and mission reaching millions of potential donors. Here are the channels to spread the Campaign:

1. Email
2. Facebook
3. Twitter

From the **CAUSES** link click on the CAMPAIGNS button on the right hand side of the screen under your name and when you click it will turn orange and display the following screen:



Email

On the page above you will be able to assign the Email message a Campaign Name (that you can re-use on Facebook and Twitter) for tracking of your communication strategy. Select a Cause from the drop down to assign the Campaign to, include a Subject line, choose your Recipients, and begin work on the Body of your Email message.

At any time you may click on the save button to store your work under the Customized (1) folder to the left. Use this feature to save work in progress or templates to use for future Campaigns.

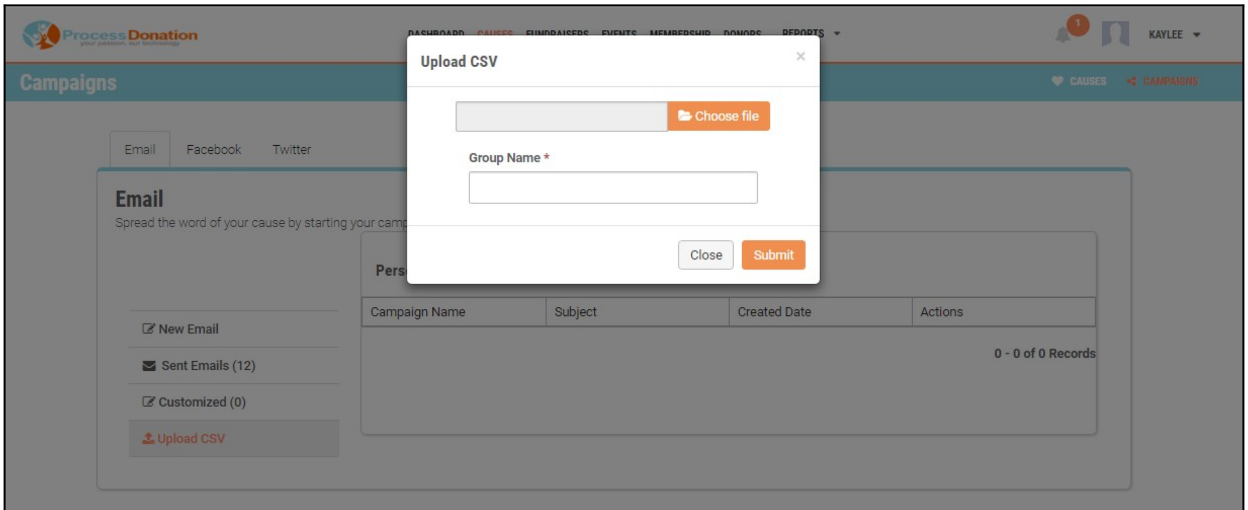
⚠ When you click on Send Email your message will be delivered to your Recipients.

Body - The Body of the email is where you can customize the message being delivered to your Recipients for this specific Campaign. Leverage our {tags} to further customize your message to the specific individual(s) you are trying to target, and we will take care of ensuring that Recipient receives a message personalized by your organization.

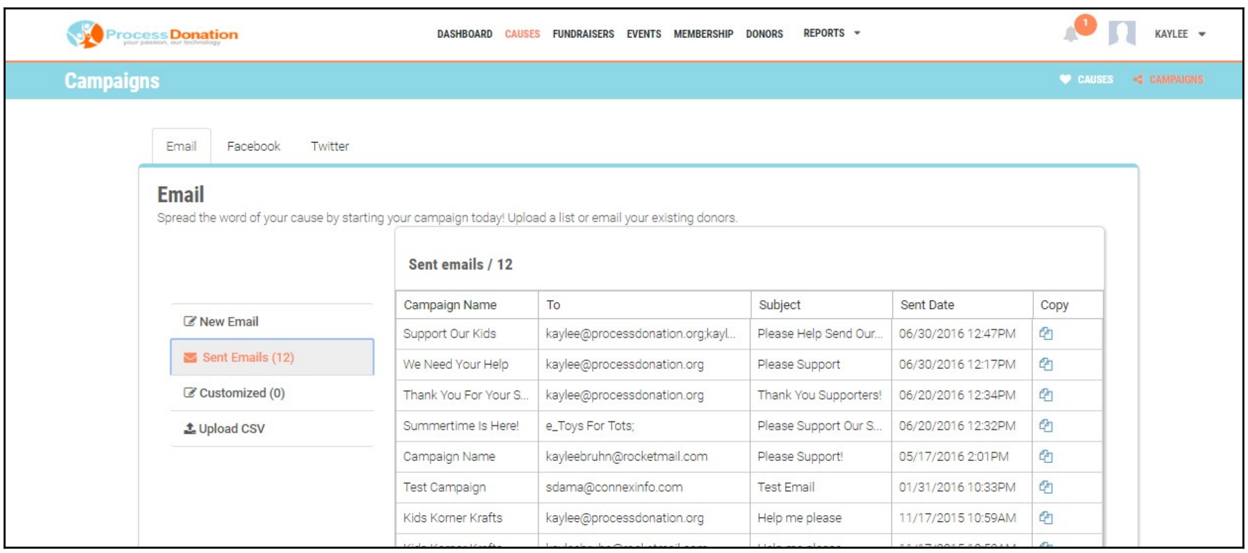
Recipients - You may enter in any email address and separate out multiple email addresses by a comma. Or you can import Recipients via our Upload CSV Upload CSV file feature; when you click on Upload CSV a pop-up box *(see below and please make sure your web browser is set to enable pop-ups from Process Donation),* it presents you with the ability find the file on your network or computer and assigns a Group Name.

CSV File Layout - Please ensure that your file contains three columns in the following order: Email, FirstName, LastName.

Group Name - The Group Name will remain in the system in the Campaign section only (it will not be available in the donor management system found under the Donors menu item) where you can select any Group Name you have created. *Please Note: the only way to add or remove contacts from a particular Group Name is to make the changes in your CSV file and re-upload to the portal through the process outlined in this section.*



Keep a log of when you sent your Campaign emails and copy a previously used Campaign email for easy and quick editing to generate a new outreach effort. This will take you to a screen to edit your copied email (see above).

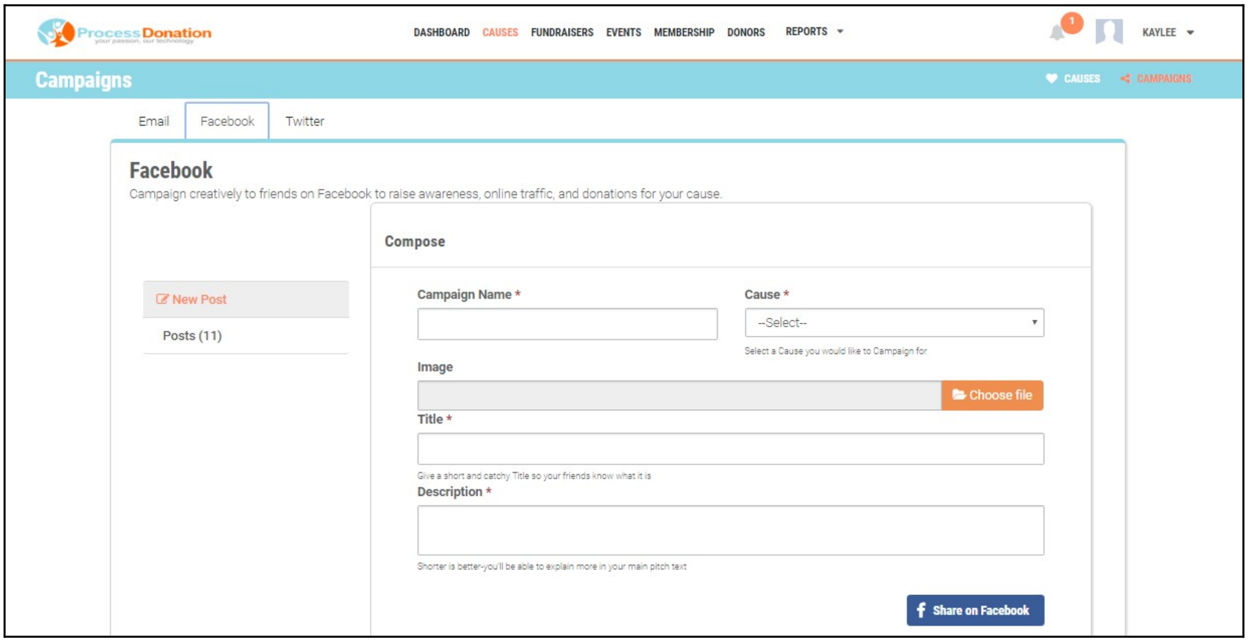


Facebook

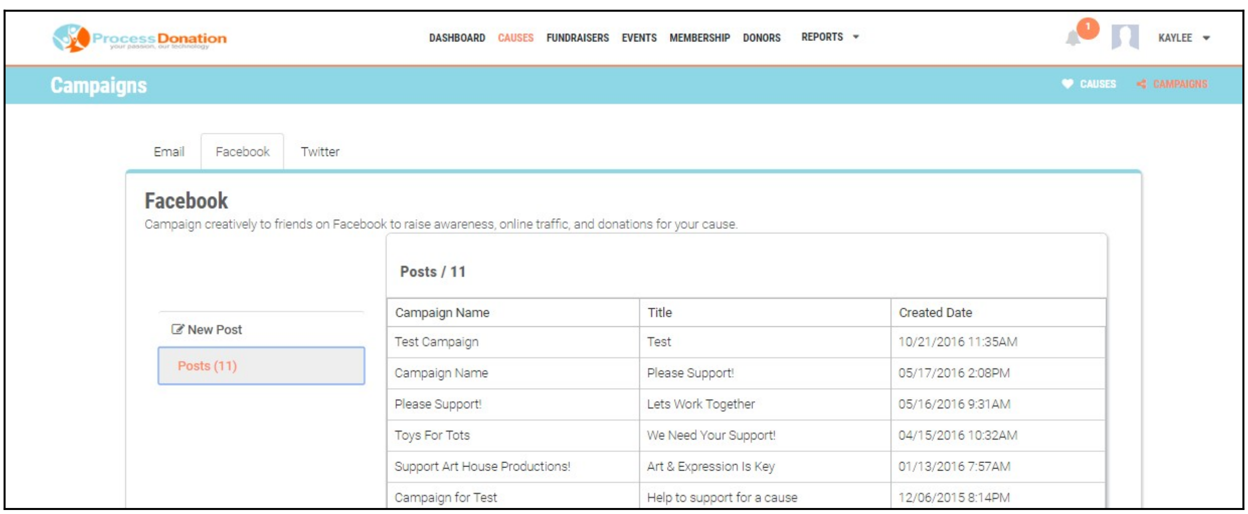
On the page below you will be able to assign the Facebook post a Campaign Name (that you can re-use on Email and Twitter) for tracking of your communication strategy. Select a Cause from the drop down to assign the Campaign to, include a Title line, a description of your Cause and Campaign goals, and upload an optional image file.

When you click on 

you will either be asked by Facebook to confirm your post or to sign in, depending upon your Facebook login status through the web browser you are using.

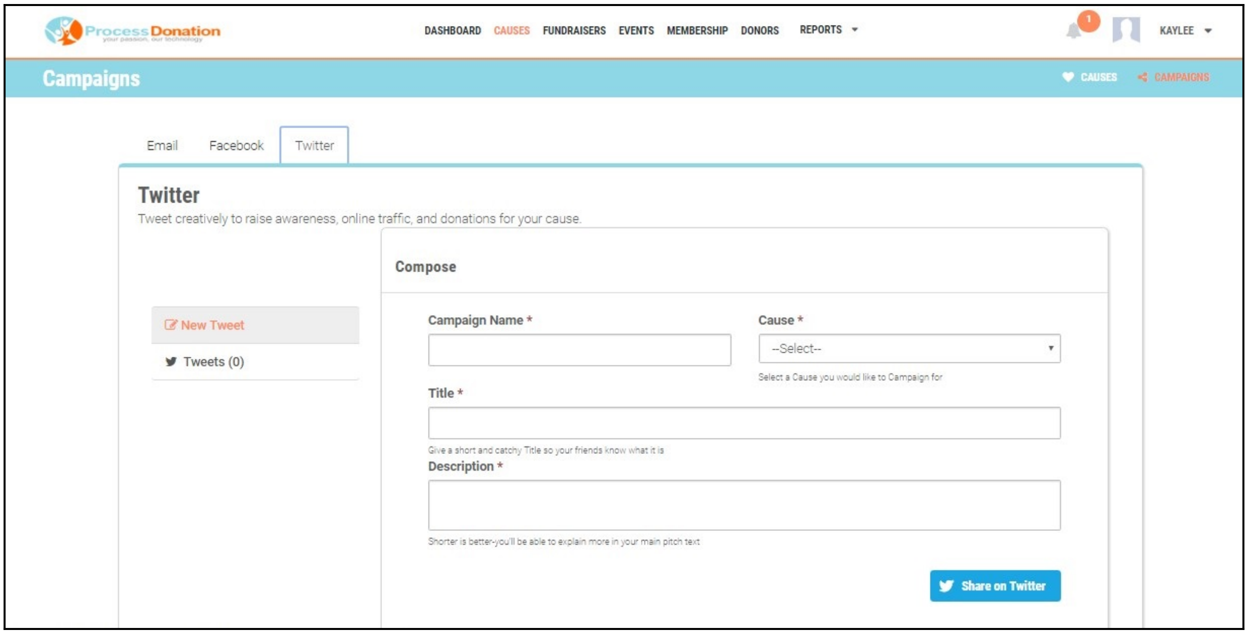


This section simply tracks the Facebook posts you have made through the Process Donation portal to make it easier to locate your previous posts through all of your normal and other Facebook activity.

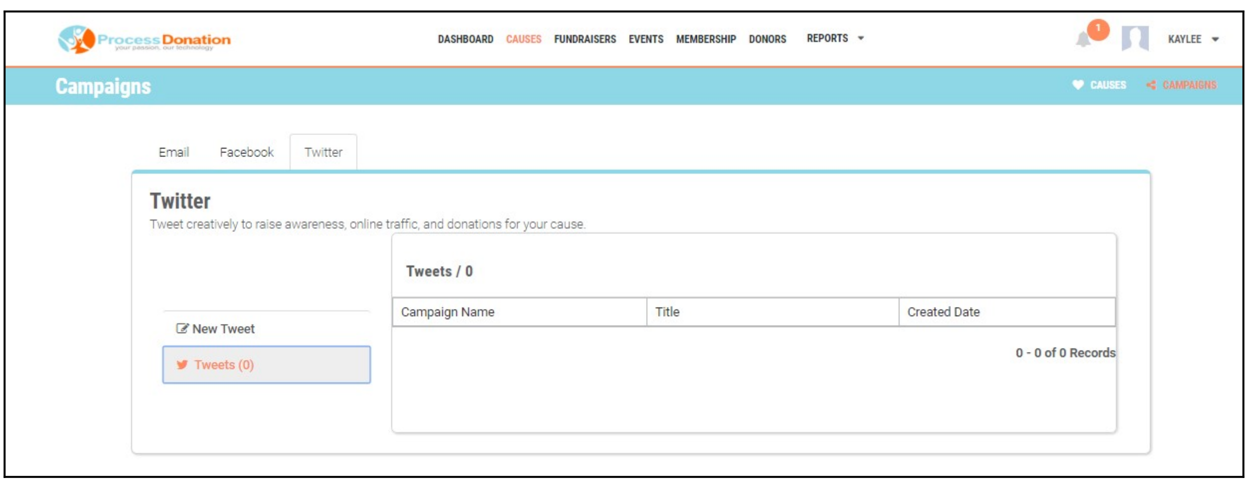


Twitter

On the page below you will be able to assign the Twitter post a Campaign Name (that you can re-use on Email and Facebook) for tracking of your communication strategy. Select a Cause from the drop down to assign the Campaign to, include a Title line, and a description of your Cause and Campaign goals.



This section simply tracks the Tweets you have made through the Process Donation portal to make it easier to locate your previous Tweets through all of your normal and other Twitter activity.



NEXT: DESIGN A CUSTOM DONATION PAGE PREVIOUS: CREATE / EDIT A CAUSE

CUSTOM DONATION PAGE

All plans allow you to choose a donation page (event or membership pages are available on certain plans) that looks as much as a part of your website as possible while still maintaining the payments security standards required. Process Donation will create these custom donation pages for you including your logo, website images, fonts and sizes, and top / bottom website menu items. These pages are compatible for mobile screen resolutions as well. This is a onetime task and once completed, you can create as many Causes as you need and start raising funds.

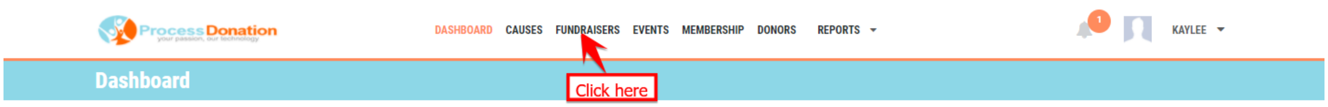
Process Donation will provide a URL to the donation page created and this unique URL will be used by you to link it to your website under a DONATE button or similar link.

PREVIOUS: CREATE A CAMPAIGN

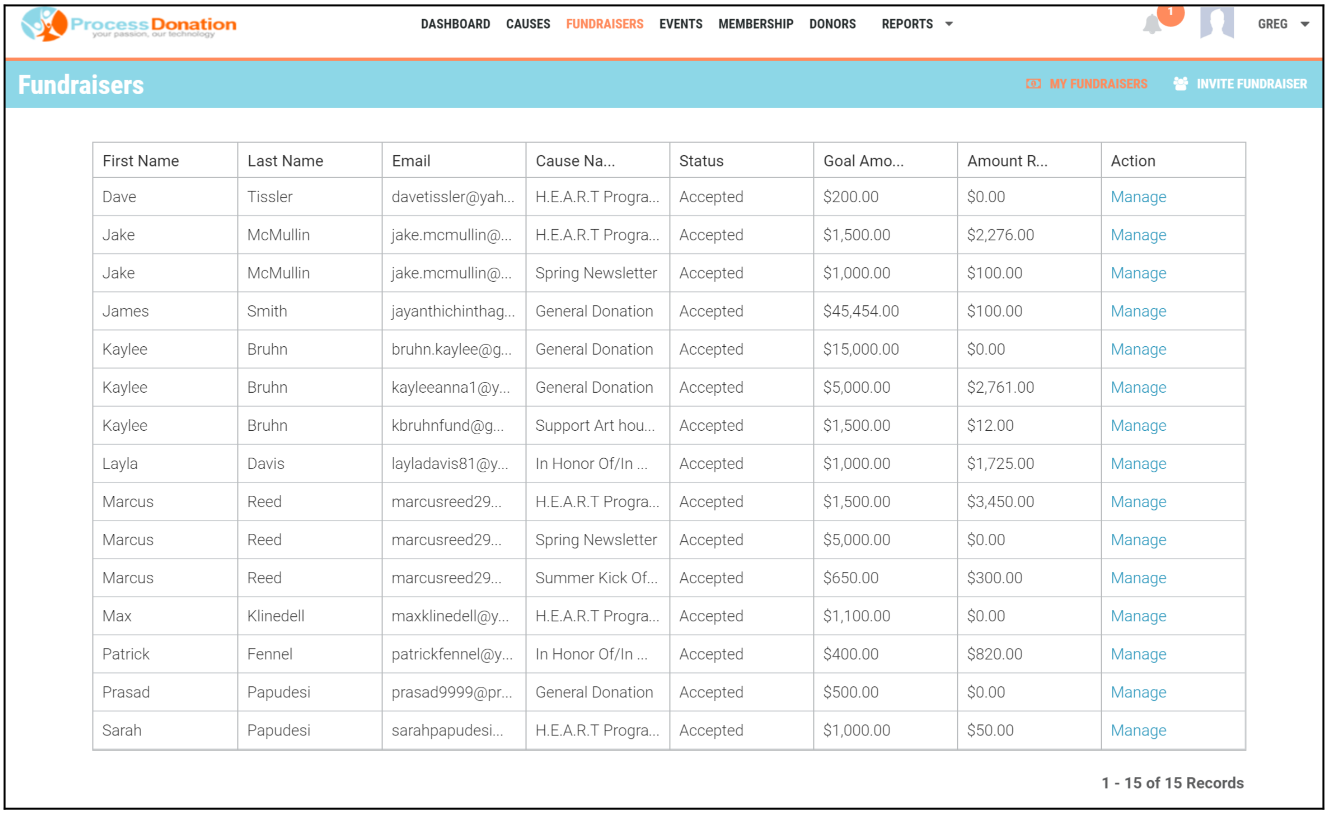
INTRODUCTION TO FUNDRAISERS

(Premium & Ultimate)

Fundraisers are the people that have agreed to help you promote your Causes. This section allows you to create a peer-to-peer fundraising program by creating online crowdfunding pages for anyone that wants to help you raise funds by promoting it within their social circle. Through our Management Portal it is easy to create a page, allow a fundraiser to tailor it to their personality, and invite people and your donors to help promote your Causes. To access the page simply click on the **FUNDRAISERS** link in the menu.

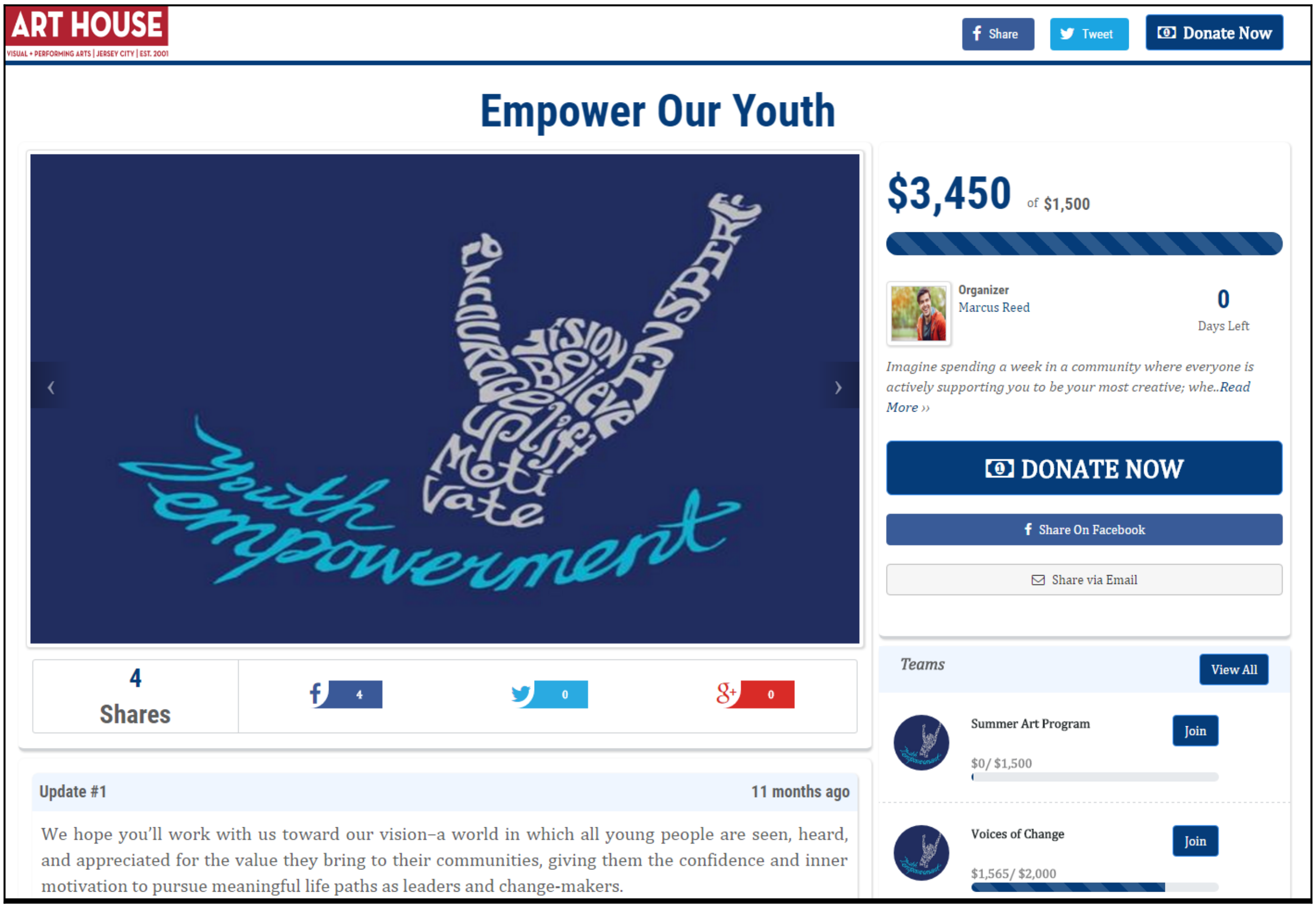


That will display a list of all of your Accepted and Not Accepted Fundraisers. You can sort the columns A-Z or Z-A and you can manage your Fundraisers by clicking on the Manage link under the Action column in the table as shown below. Or you can invite new Fundraisers.



First Name	Last Name	Email	Cause Na...	Status	Goal Amo...	Amount R...	Action
Dave	Tissler	davetissler@yah...	H.E.A.R.T Progra...	Accepted	$200.00	$0.00	Manage
Jake	McMullin	jake.mcmullin@...	H.E.A.R.T Progra...	Accepted	$1,500.00	$2,276.00	Manage
Jake	McMullin	jake.mcmullin@...	Spring Newsletter	Accepted	$1,000.00	$100.00	Manage
James	Smith	jayanthichinthag...	General Donation	Accepted	$45,454.00	$100.00	Manage
Kaylee	Bruhn	bruhn.kaylee@g...	General Donation	Accepted	$15,000.00	$0.00	Manage
Kaylee	Bruhn	kayleeanna1@y...	General Donation	Accepted	$5,000.00	$2,761.00	Manage
Kaylee	Bruhn	kbruhnfund@g...	Support Art hou...	Accepted	$1,500.00	$12.00	Manage
Layla	Davis	layladavis81@y...	In Honor Of/In ...	Accepted	$1,000.00	$1,725.00	Manage
Marcus	Reed	marcusreed29...	H.E.A.R.T Progra...	Accepted	$1,500.00	$3,450.00	Manage
Marcus	Reed	marcusreed29...	Spring Newsletter	Accepted	$5,000.00	$0.00	Manage
Marcus	Reed	marcusreed29...	Summer Kick Of...	Accepted	$650.00	$300.00	Manage
Max	Klinedell	maxklinedell@y...	H.E.A.R.T Progra...	Accepted	$1,100.00	$0.00	Manage
Patrick	Fennel	patrickfennel@y...	In Honor Of/In ...	Accepted	$400.00	$820.00	Manage
Prasad	Papudesi	prasad9999@pr...	General Donation	Accepted	$500.00	$0.00	Manage
Sarah	Papudesi	sarahpapudesi...	H.E.A.R.T Progra...	Accepted	$1,000.00	$50.00	Manage

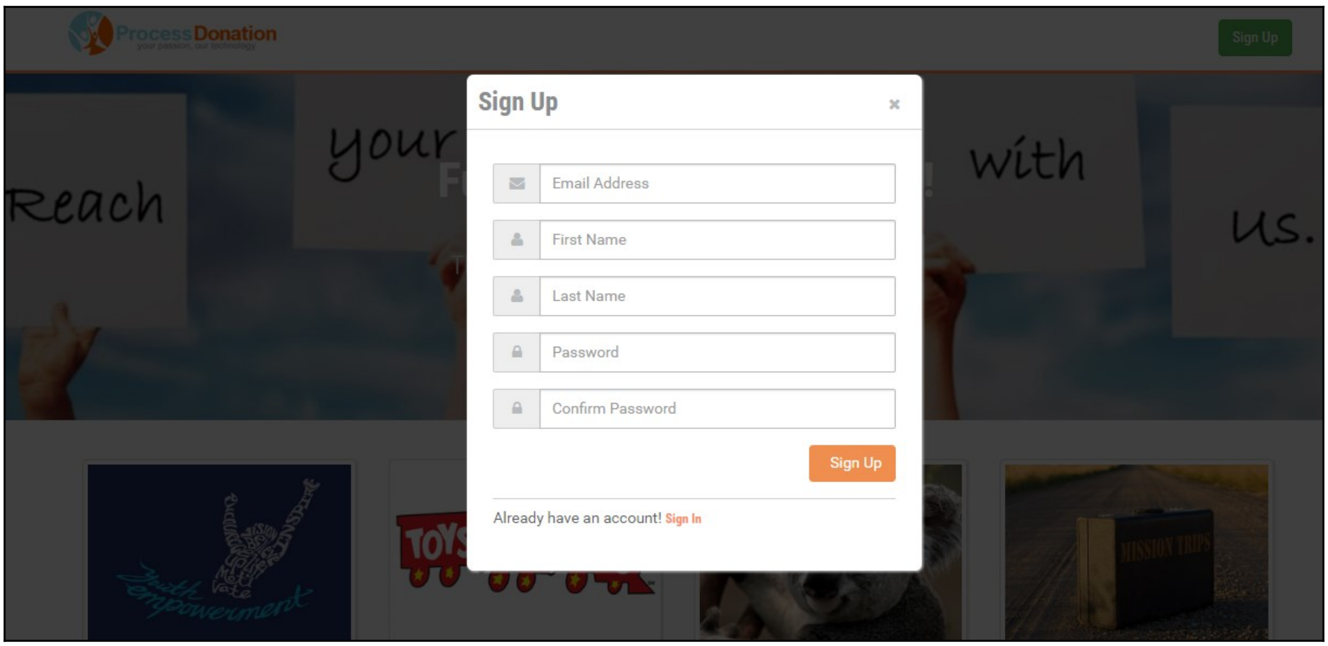
Fundraisers create pages similar in format to the one shown here, although they (and you) have the ability to change colors, add pictures / videos, and customize the message and appeal to potential donors. This page becomes the Fundraiser's to promote in their social circles, through email, Facebook, or Twitter to drive potential donors to a site that can take in donations on your behalf.



[**NEXT: INVITE FUNDRAISERS**]

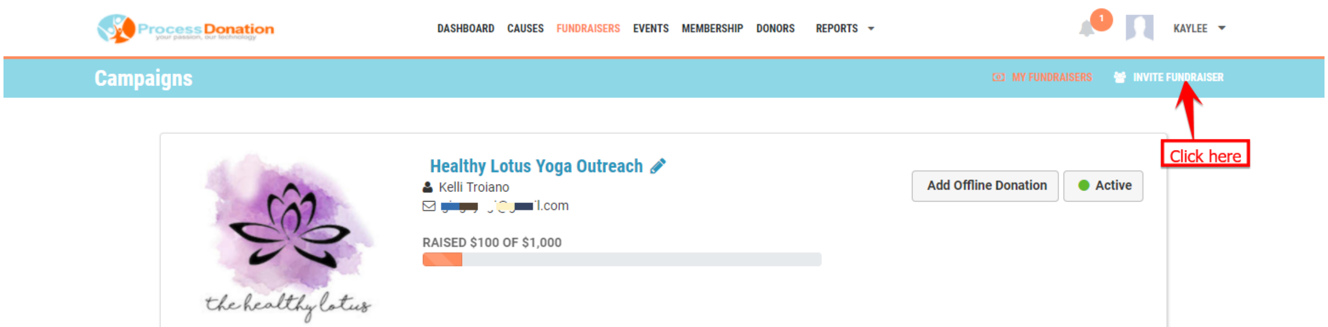
INVITE FUNDRAISERS

With Process Donation, it is simple and easy to sign-up and get people involved in helping you raise funds for your Causes. You simply leverage our technology to invite people to participate by asking them for their Email, First Name, Last Name, and for them to create their password. Once they complete those steps, their name will appear in your list of Fundraisers and you can begin getting them involved a message that can be unique and tailored to them. Here is what our sign-up page looks like:



To drive potential Fundraisers to that sign-up page you can either go to the **FUNDRAISERS** menu item and use our **INVITE FUNDRAISER** link that will send an invite to the Fundraiser profile you create, or we can create a custom Fundraiser link for you to share via the Email Campaign feature described in the Causes section (an example can be found at the end of this section) or via another referral source such as a link from your webpage.

Invite Fundraiser



Cause - This section will display a list of Active Causes next to a check box. By selecting one or more check boxes, you will assign your Fundraiser to the checked Causes and you will need to specify a Goal Amount and End Date (Optional for NPO). These can be modified and adjusted at any time and will be visible to any potential donors that visit your Fundraiser's page.

First Name – First Name of the Fundraiser

Last Name – Last Name of the Fundraiser

To – Email Address of the Fundraiser

Additional Message (Optional) – Include a message and a description of your Cause

⚠ By clicking on Send Invitation, it will send an email to your Fundraiser similar to the example found under the **Send Email** image below.

When the Fundraiser clicks on the link from the email, it will take them to a screen similar to the Sign Up screen at the top of this page.

Send Email

Search this User Guide and under the **Create a Campaign** topic, follow the instructions on Email generation within the **CAUSES** menu item. You can use that functionality coupled with a custom Fundraiser link (Eg: http://fundraiser.helpadesi.com/@Merchantshortname/) to invite people to become a

Fundraiser for select Causes. The Invitation could look like this:

Lt Col Arthur King Composite Sq
CALIFORNIA WING CIVIL AIR
Auxiliary of the United States Air
Post Office Box 1434, Modesto CA 9
Modesto Airport, 700 Tioga D
Modesto, California 95354

Dear Kaylee,

You are cordially invited to join us as a supporter for the cause(s) mentioned below.

General Donation
H.E.A.R.T Program
Support Art house productions

Please click on the link below to Sign Up and start accepting funds from your family and friends instantly by creating fundraising pages for your favorite causes.

http://fundraiser.helpadesi.com/Signup.aspx?Auth=HABGHC9F57B36B16I910

For any questions, please contact our customer support via the email address mentioned below. Thank you very much for your support!

Regards,

Art House Productions
136 Magnolia Avenue
Jersey City, IL 07306
Ph:242-342-3423
NPO-arthouseproductions@connexinfo.com

When the Fundraiser clicks on the link from the email, it will take them to a screen similar to the Sign Up screen at the top of this page.

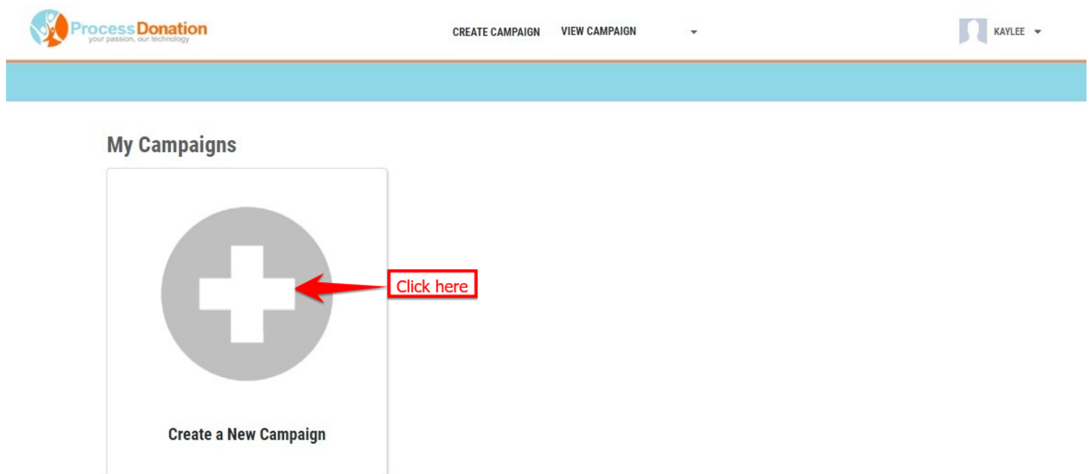
Other Referral Source

You may choose to have your website or social media site direct people to a Fundraiser sign up page that we can host on your behalf. It would look similar to the picture at the top of this page. Your Fundraiser would just need to fill in the fields and an account would be created for them.

PREVIOUS: INTRODUCTION TO FUNDRAISERS **NEXT: CREATE A FUNDRAISER PAGE**

CREATE A FUNDRAISER

Once a Fundraiser has received their login credentials and has successfully logged in to the portal, then they will be asked to create their own fundraiser page, by following the simple steps displayed on their landing page. Simply click on the **Create a New Campaign** box of **CREATE CAMPAIGN** link at the top to get started.

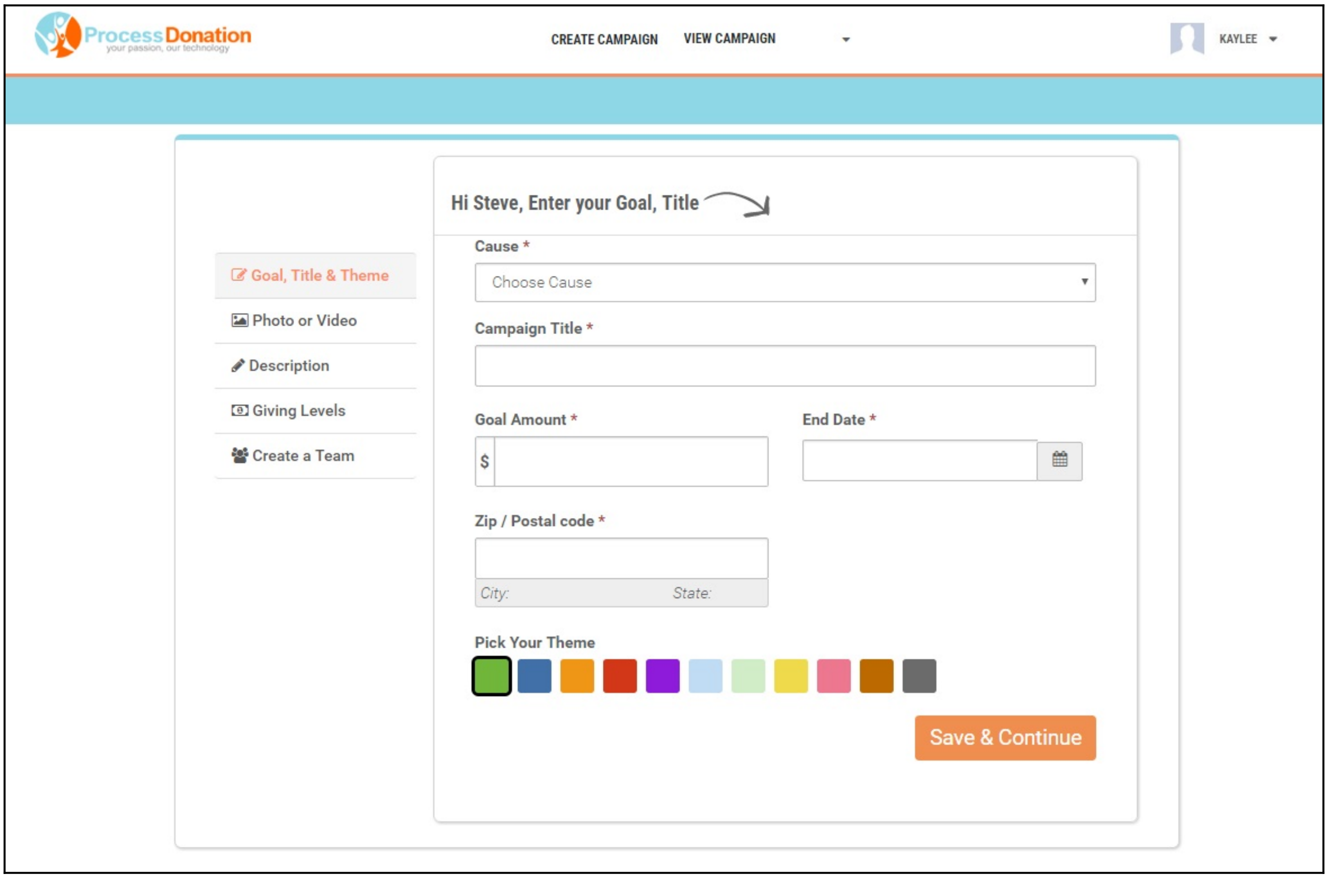


PREVIOUS: INVITE FUNDRAISER

NEXT: SETTING UP A GOAL

SETTING UP A GOAL

Your Fundraiser can begin customizing their Campaign.



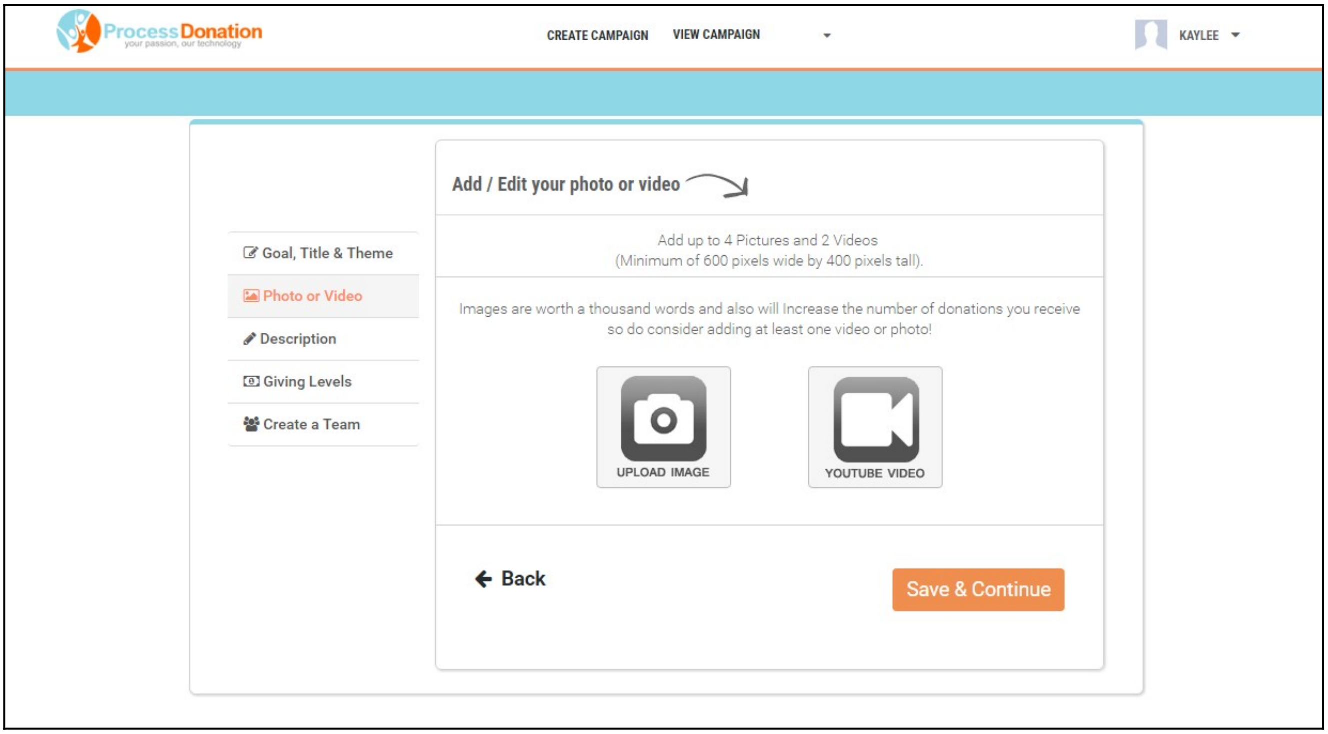
1. **Cause** – They can choose from any one Cause that you invited them to assist you in raising awareness and funds.
2. **Campaign Title** – A title for the Fundraiser page
3. **Goal Amount** – The Fundraiser sets a goal amount that they are seeking to raise on your behalf
4. **End Date** – Set the end date for their involvement in your campaign
5. **Zip / Postal code** – This is a field that will accept a postal code and automatically populate the City and State fields
6. **Pick Your Theme** - The Fundraiser can choose from the colors available to set a particular color as the theme color of the page

Save & Continue to proceed to creating Fundraiser page

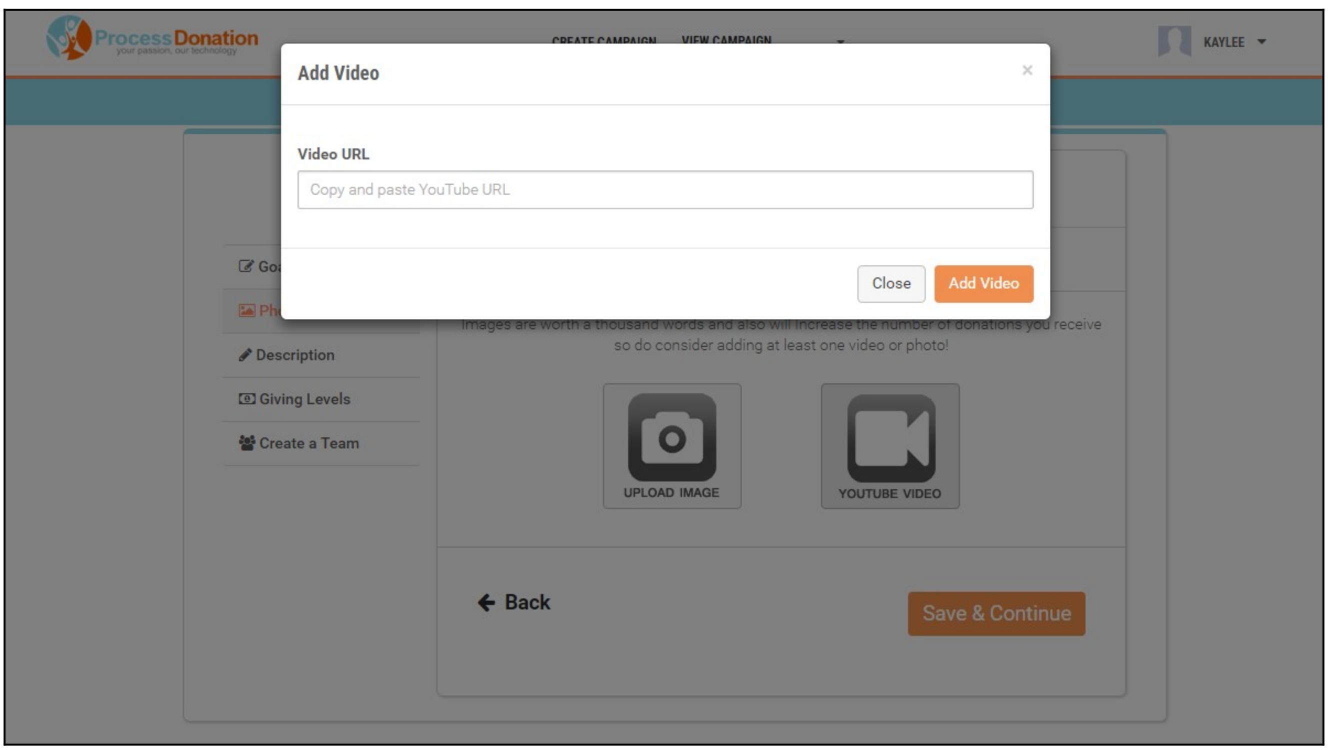
PREVIOUS: CREATE A FUNDRAISER PAGE

NEXT: UPLOAD PICTURES AND VIDEOS

UPLOAD PICTURES AND VIDEOS



UPLOAD IMAGE – Click in this icon to upload images for the fundraiser page



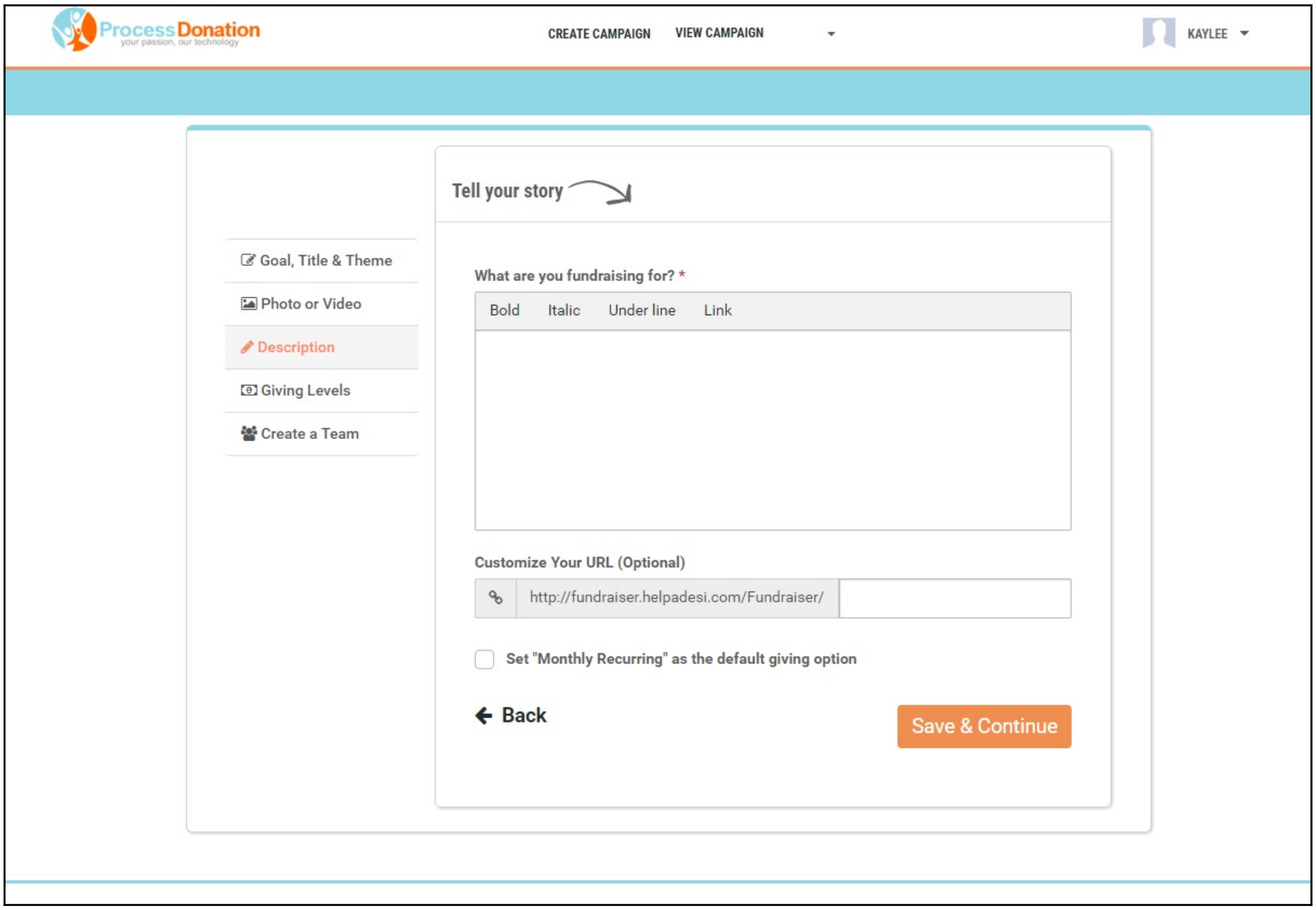
YOUTUBE VIDEO – Click to add video URL of your choice

Back – You may choose to go back to previous window by clicking on back

Save & Continue to proceed to creating fundraiser page

PREVIOUS: SETTING UP A GOAL **NEXT: FUNDRAISER DESCRIPTION**

FUNDRAISER DESCRIPTION



1. **Why are you raising money?** – In this section your Fundraiser can put together a write up as to why they are raising funds, who is getting benefited and what is your objective
2. **Customize Your URL (Optional)** – Here you can customize your URL
3. **Set "Monthly Recurring" as the default giving option** – You may choose to make the default donation type as recurring

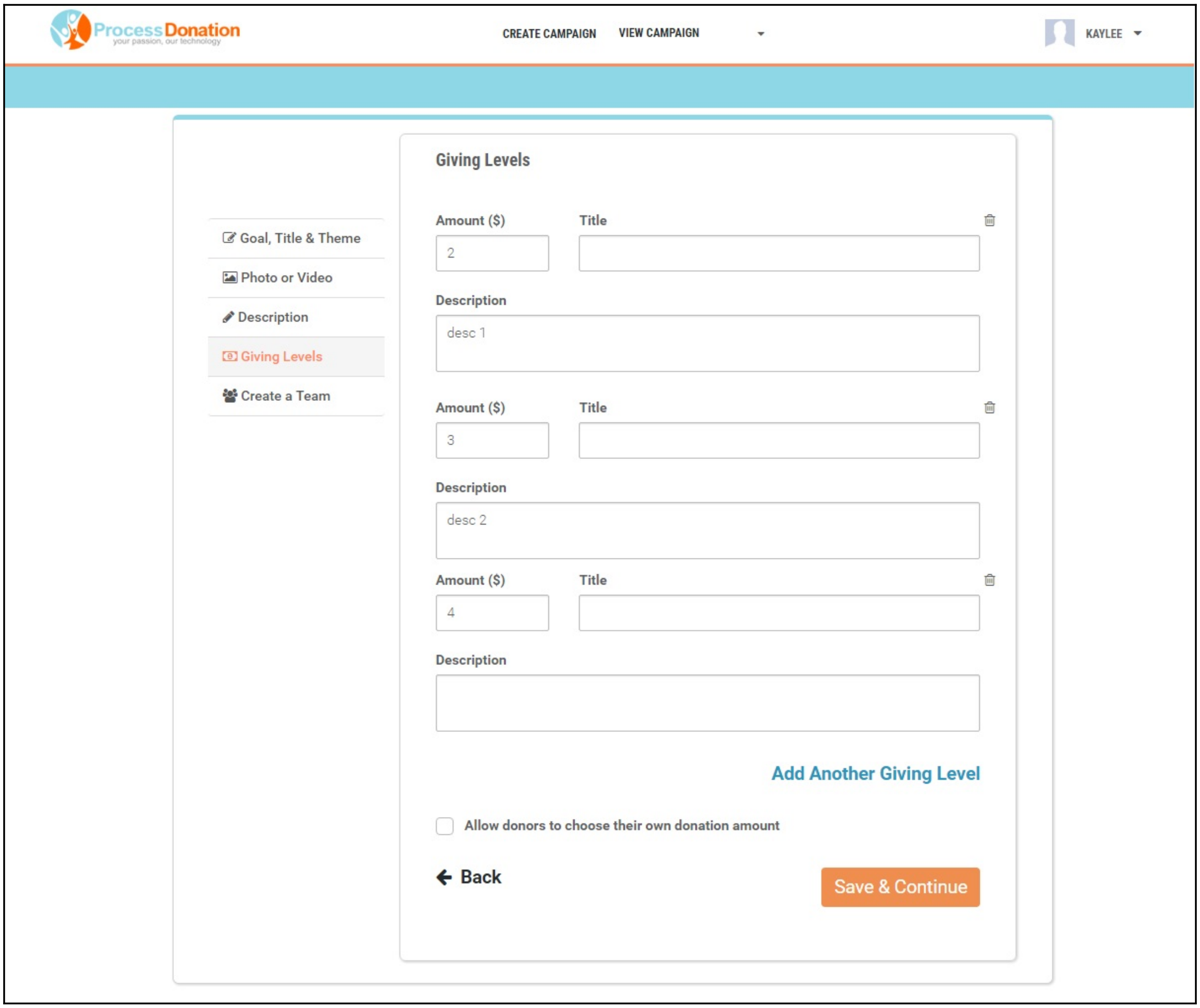
Back – You may choose to go back to previous window by clicking on back

Save & Continue to proceed to creating fundraiser page

PREVIOUS: UPLOAD PICTURES AND VIDEOS NEXT: SETUP GIVING LEVELS

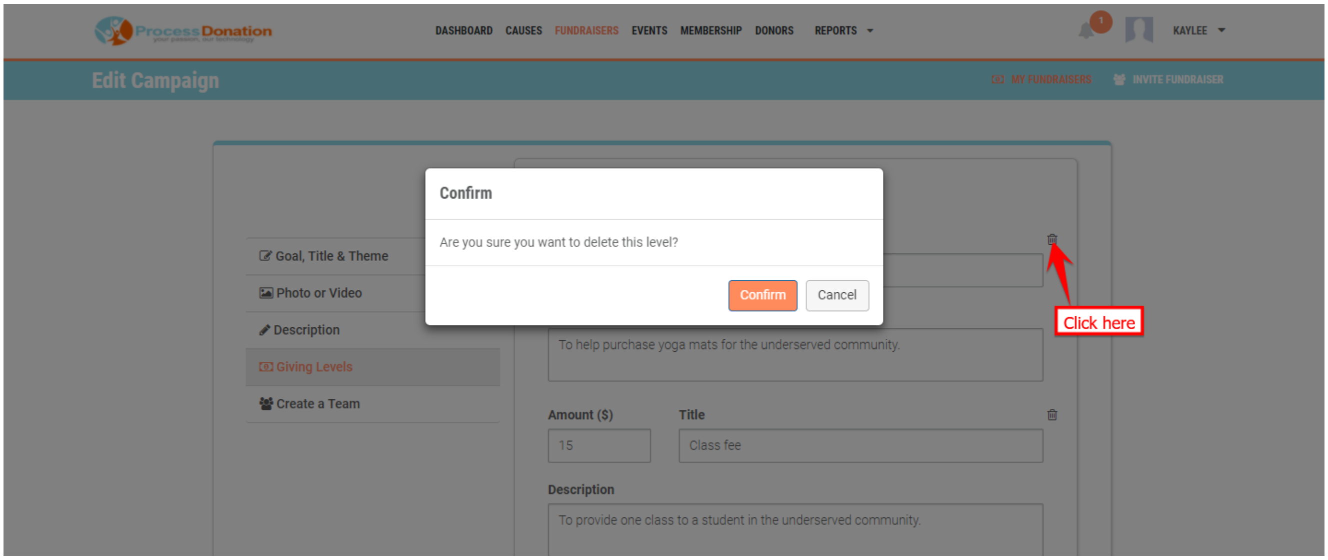
SETUP GIVING LEVELS

This is where your Fundraiser can define the Giving Levels they want to allow potential donors to contribute.   Although the Fundraiser sets this up, through the Manage feature you can edit any Fundraiser campaign; instructions can be found in the Manage Fundraiser page section of this User Guide.



1. **Amount** – Enter the dollar amount for the Giving Level
2. **Title** – Here they can give a title to the Giving level
3. **Description** – They may leave a brief note for this Giving Level
4. **Add Another Giving Level** – You could add more Giving Levels

5. **Delete Icon -** You could also delete a particular Giving Level when you decide that you no longer need it



Allow donors to choose their own donation amount

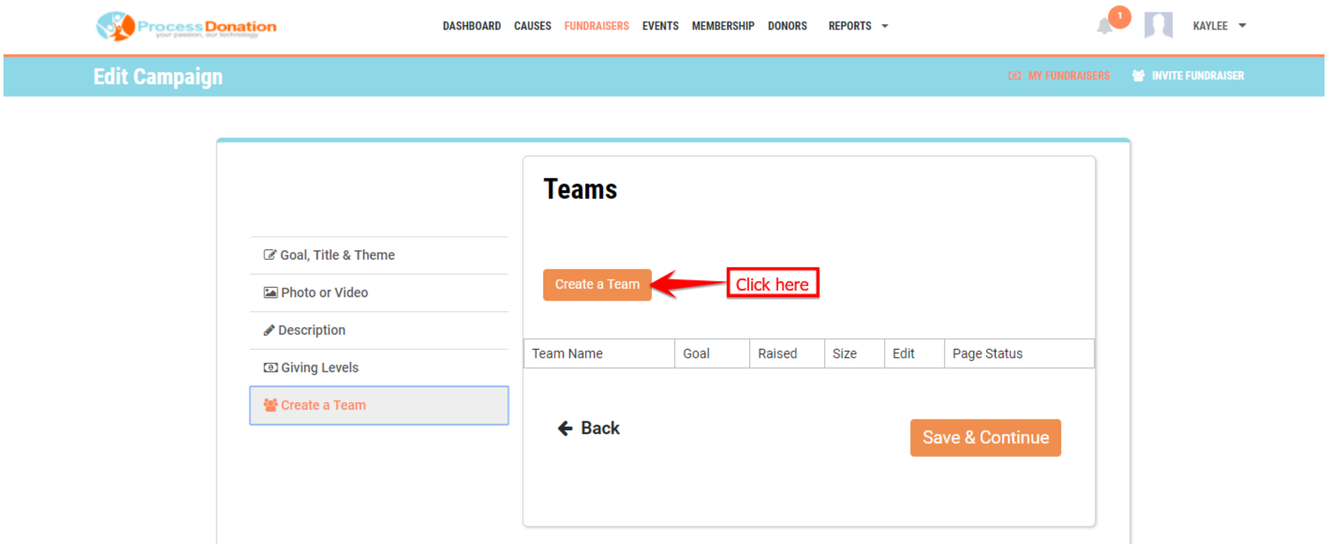
Back – You may choose to go back to previous window by clicking on back

Save & Continue to proceed to creating fundraiser page

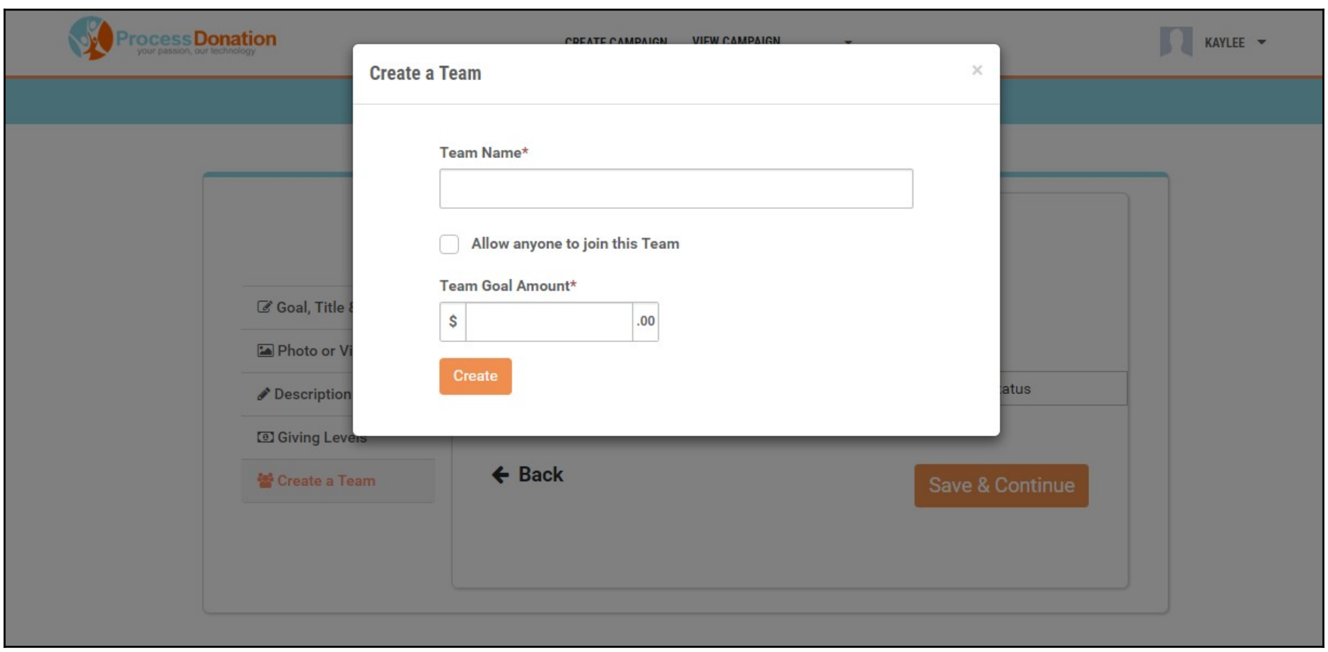
[PREVIOUS: FUNDRAISER DESCRIPTION](#) [NEXT: CREATE AND MANAGE TEAMS](#)

CREATE AND MANAGE TEAMS

Your Fundraiser can use this section to finalize and post their page on a Process Donation hosted page and invite others to not only donate, but also become a fundraiser for your Fundraiser. They do this by creating a Team.



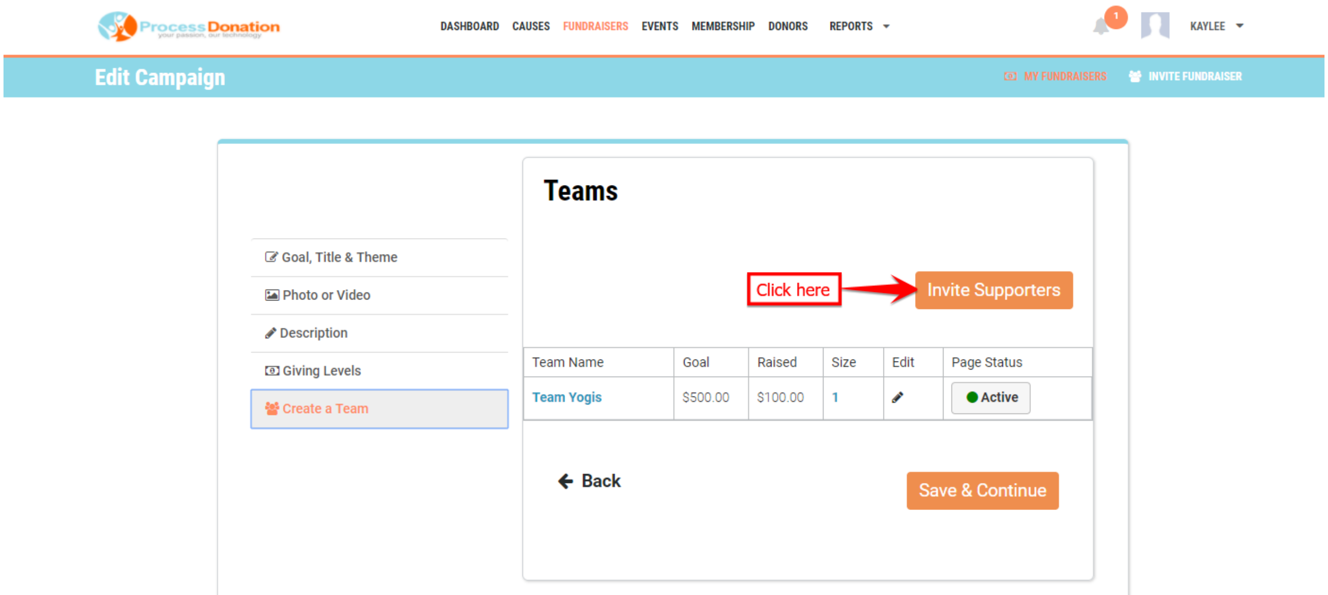
Create a Team - When your Fundraiser clicks on the button to create a team they can invite any number of people to join their team and help them raise funds for your Cause.



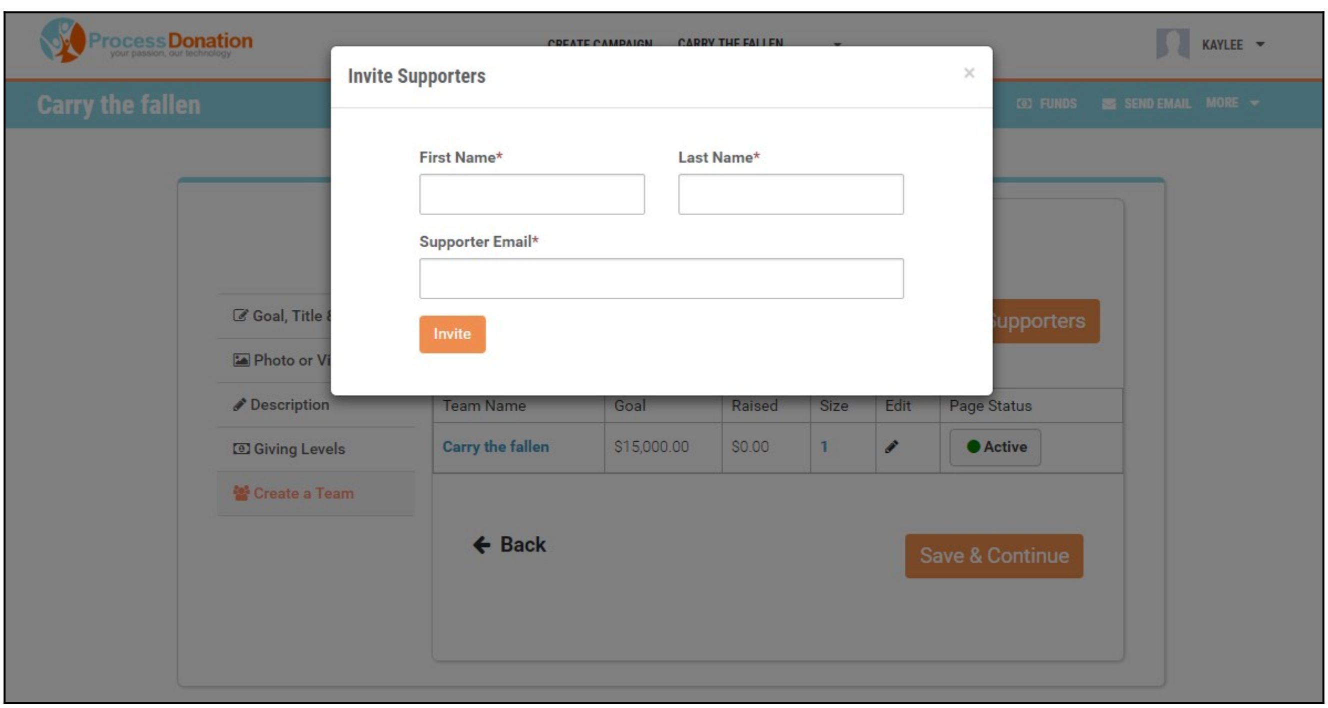
Team Name - Your Fundraiser can further personalize their efforts by giving their new team a name

Allow anyone to join this team - By enabling this checkbox your Fundraiser can choose to allow anyone/supporter to join and help raise funds

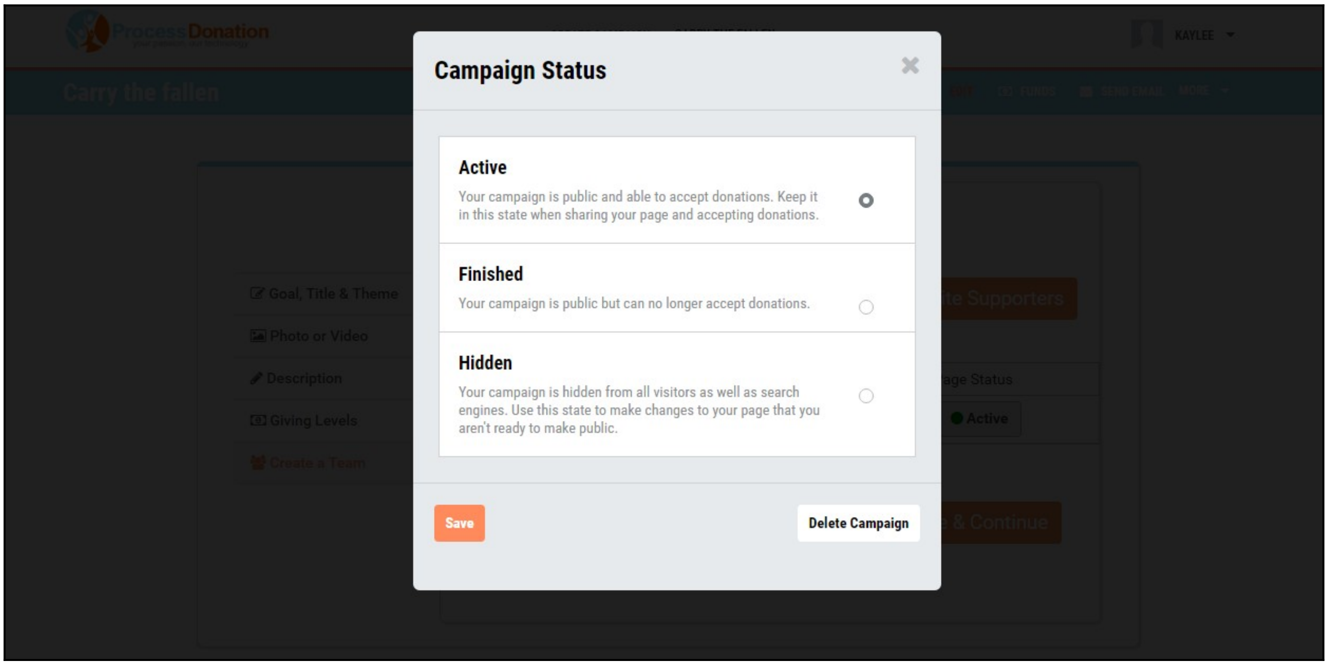
Team Goal Amount - Your Fundraiser can set any goal amount for the Team to make it competitive



Invite Supporters - Your Fundraiser can Invite Supporters



Active - By clicking on the green Active button next to the Team name, your Fundraiser can the status of the Campaign.



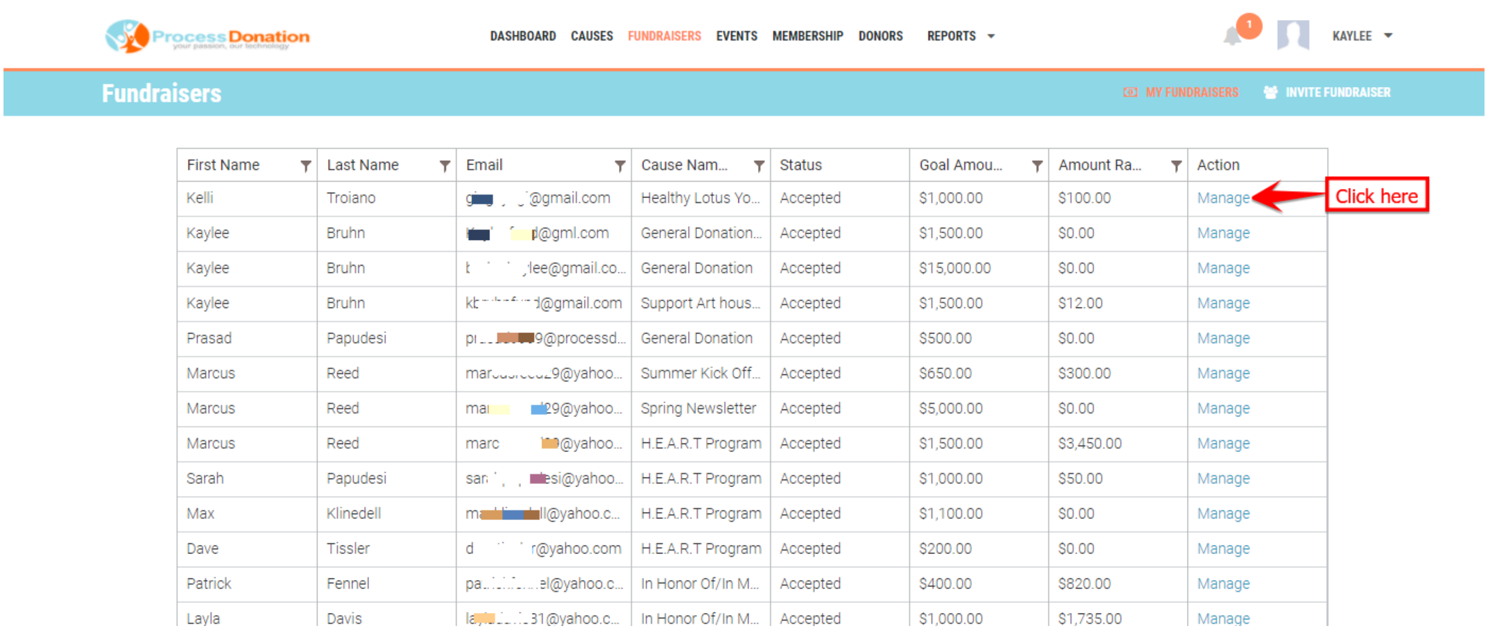
Save & Continue to proceed to creating fundraiser page

[PREVIOUS: SETUP GIVING LEVELS]

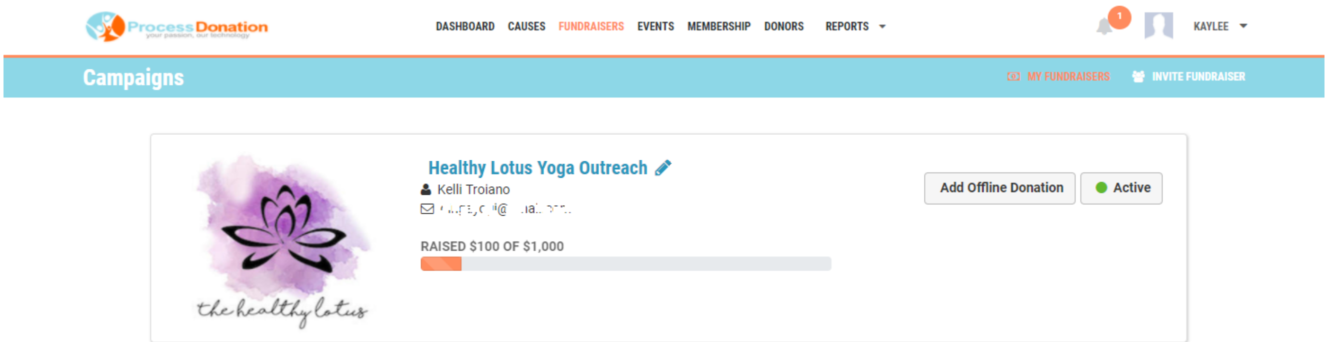
[NEXT: MANAGE FUNDRAISER PAGE]

MANAGE FUNDRAISER PAGE

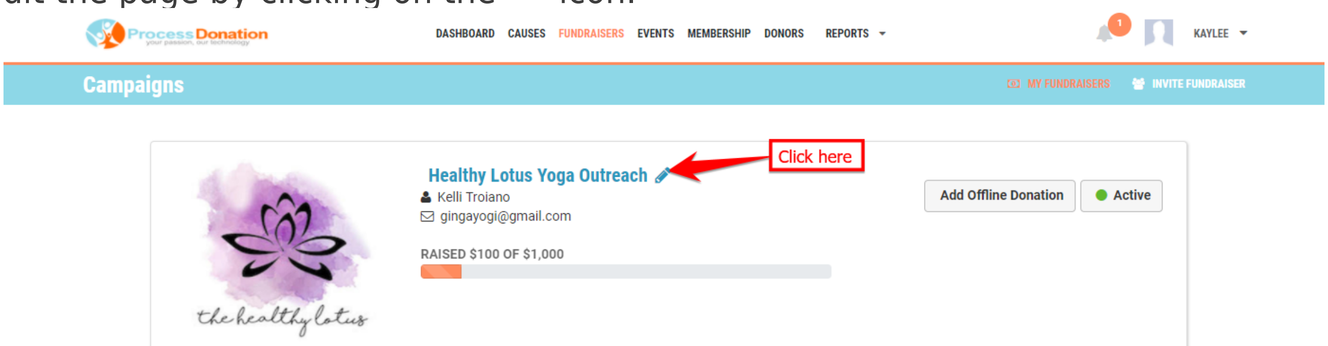
Once you have invited people to help you raise money or they found the sign-up form on your website, you can use the Fundraisers section to manage the various efforts underway to help you raise funds by providing you with a quick snapshot of your Fundraisers' activities and allows you to take action. On this view, you can edit a Campaign / Fundraiser page (whether you created the page or they did), create Teams, Invite more supporters to become Fundraisers, access specific Fundraiser pages using title hyperlink, change the page status to Active, Finished, Hidden, or Delete.



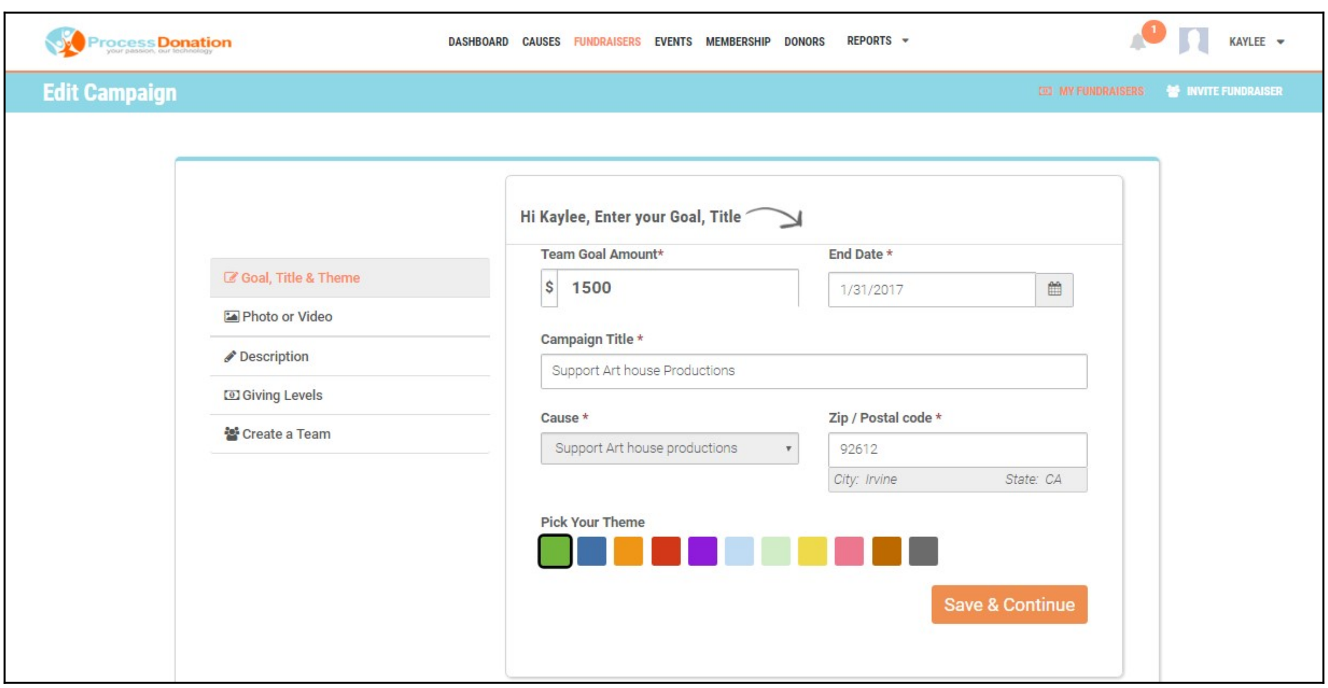
Once you have clicked MANAGE next to the Fundraiser's name, the system takes you to the following screen for further action:



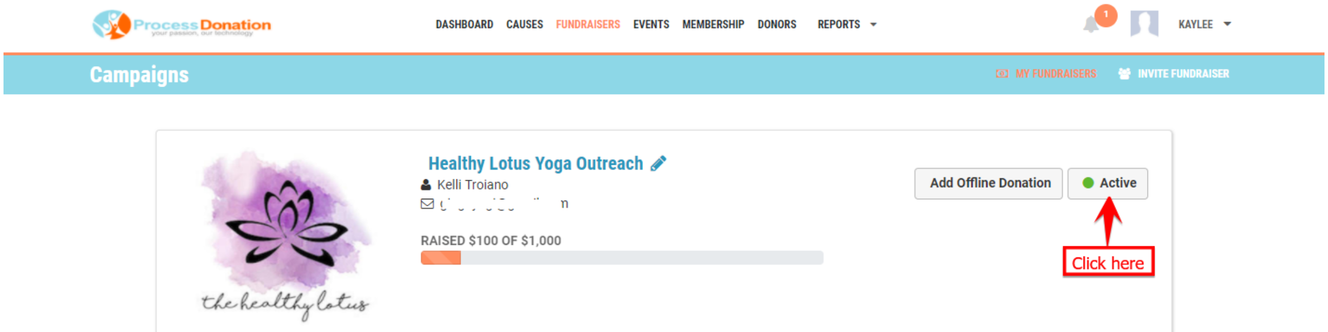
You can edit the page by clicking on the icon.



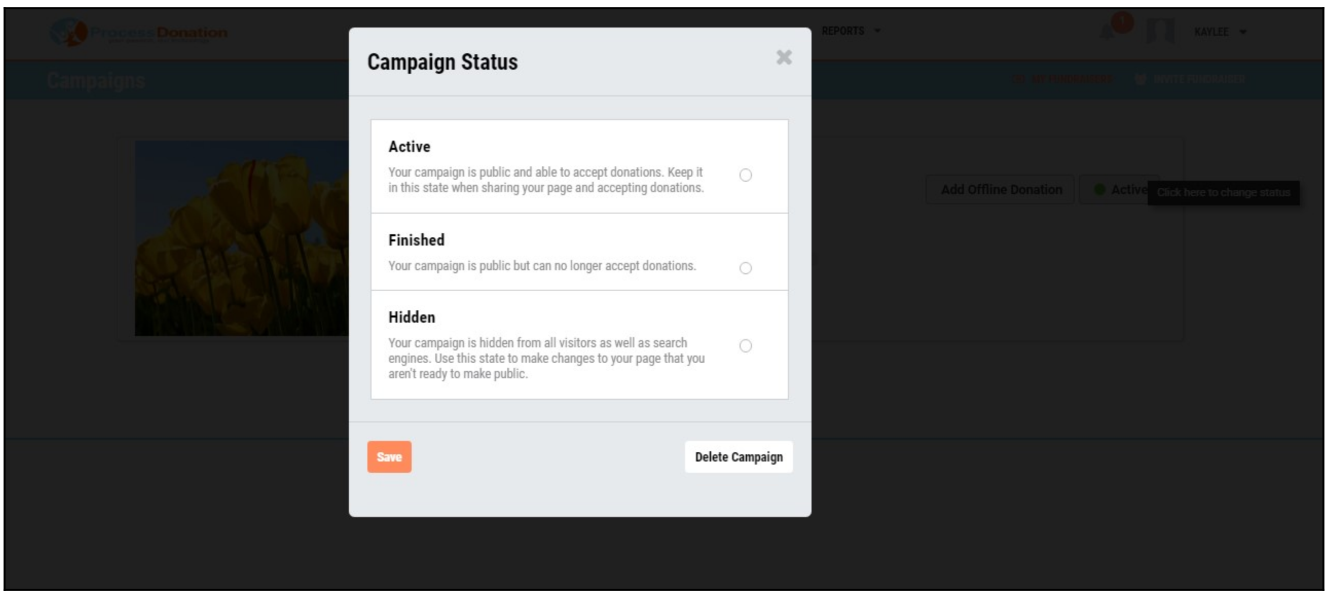
And you will be redirected to the page where you can edit the information, the flow will be similar to creating a new Fundraiser page.



To deactivate an existing Campaign / Fundraiser page you can simply click on the Active button:



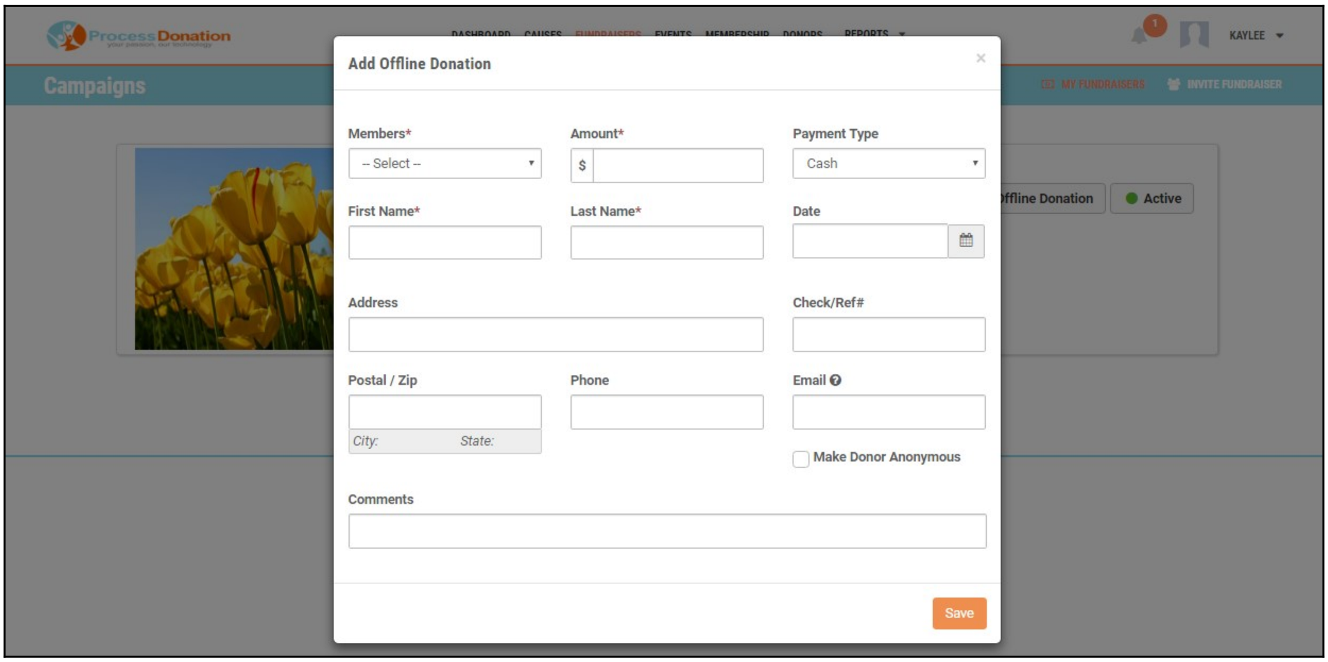
And take necessary action:



PREVIOUS: CREATE AND MANAGE TEAMS **NEXT: ADD OFFLINE DONATIONS**

ADD OFFLINE DONATIONS

A Fundraiser can collect funds through the online page they (or you) create. Also, there might be donors that hand you or your Fundraiser a check or cash to contribute towards your Fundraiser's efforts. In that case, you or your Fundraiser (but Team Members do not have this ability) will be able to Add Offline Donations for Fundraiser and Team Members. The following is a data entry screen, once Saved, the transaction will appear in the reporting like any online transaction and will be available for year end tax reporting.



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1. **Members** - Select the Member / Donor from the drop down
2. **Amount** - Enter the amount
3. **Payment Type** - Select the payment type as Cash or Check
4. **First Name** - Enter first name
5. **Last Name** - Enter last name
6. **Date** - Select the date of payment (you can make this an "Effective Date"; typically important around year end)
7. **Address** - Enter the address

8. **Check/Ref#** - Enter a reference number to track the payment
9. **Postal / Zip** - Enter Zip code, this will auto populate the city and state
10. **Phone** - Enter phone number
11. **Email** - A receipt will be sent to the email ID provide in this field
12. **Make Donor Anonymous** - If the donor chooses to remain anonymous, simply check this box
13. **Comments** - Leave a comment for reference if you wish

Click on Save to save the offline donation

PREVIOUS: MANAGE FUNDRAISER PAGE

INTRODUCTION TO EVENTS

(Ultimate)

The Process Donation Events module allows you to easily organize and promote events, sell tickets, collect information from the registrants online and then check them in at the venue using our mobile app. You can create multiple Ticket types (for General, VIP, Member, etc...) and the system also supports Promo Codes to offer discounts to registrants. You have the ability to view the list of registrants and the tickets sold as well as export them to Excel, CSV, or PDF. And just like Causes and Fundraiser functionality, all of the data you collect is available in our Reporting and Donor Management System.

You can organize free events or paid events and you also have the ability to let the registrants pay later, either by mail or pay at the venue.

Here is how Events module works.

1. **Design a custom events page template**

   Process Donation will create a custom Events page template that matches the look and feel of your website. This is a one-time task. Once the custom Events page template is created, you can create as many Events as you would like. This is similar to the Custom Donation Page. Learn more.

2. **Create an Event**

   In order to create an Event, you need to have the Event details including the name, description, start and end dates, contact information, ticket pricing, type of information to collect from registrant etc. Creating an Event is a simple 3-step process. Learn more.

3. **Connect the event page to your website**

   When you create an Event, it generates a URL for the Event page automatically. This URL should then be connected to the appropriate tab or button on your website. Learn more.

4. **Create/manage Promo Codes**

   You can create Promo Codes to offer discounts. You can set up start and end dates for the Promo Codes. You have the flexibility to offer discounts by certain amount or percentage of the order value. Learn more.

5. **Manage an event**

   You can always update the Event information like name or description. You can also add/remove ticket types or update ticket pricing. You can also deactivate the Event. Learn more.

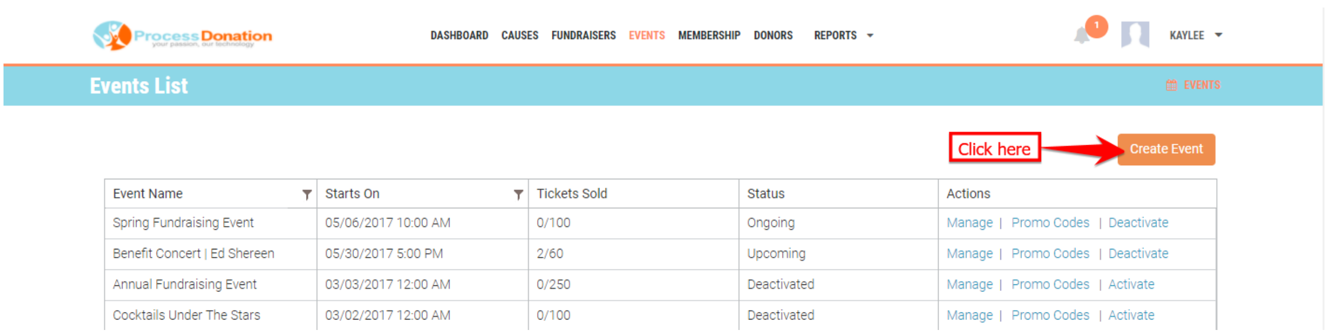
PREVIOUS: INTRODUCTION TO FUNDRAISERS **NEXT: HOW TO DESIGN A CUSTOM EVENTS PAGE?**

DESIGN A CUSTOM EVENTS TEMPLATE

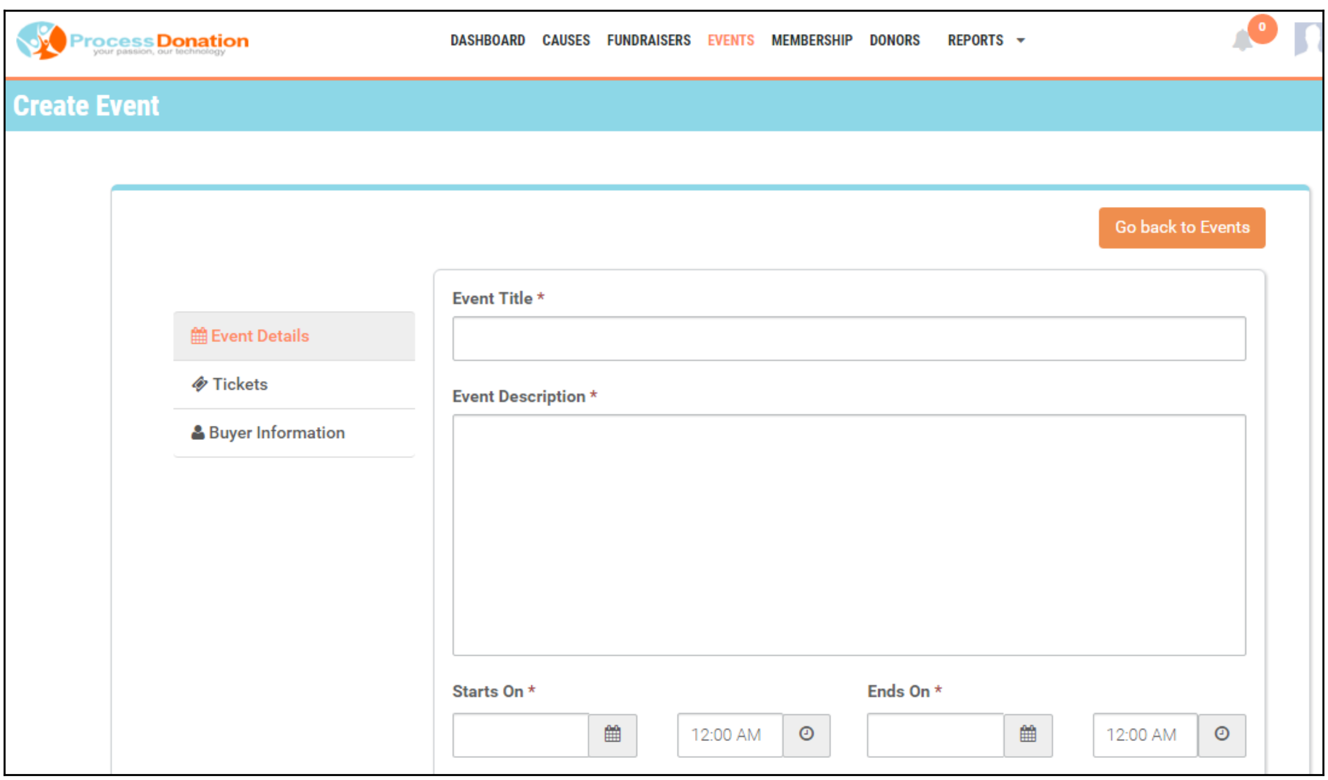
Similar to the Custom Donation Page, Process Donation will create a Custom Events Page template that matches the look and feel of your website. This is a one-time task. Once the Custom Events Page template is created, you can create as many Events as you would like leveraging the already created template. This allows you to keep your donors and registrants on a page that looks like it's as part of your website as possible while still maintaining the payments security standards required. Process Donation will create these Custom Event Pages for you including your logo, website images, fonts and sizes, and top / bottom website menu items. These pages are compatible for mobile screen resolutions as well. This is a onetime task and once completed, you can create as many Events as you need. Process Donation will provide a URL to the Event page created and this unique URL will be used by you to link it to your website.

CREATE AN EVENT

To create an Event, first make sure you have requested a Custom Events Template / Page from Process Donation. You will have requested this during the sign-up process or by emailing Process Donation at support@processdonation.org. Whether you have a Custom Events Template page created or you are waiting for Process Donation to send you a unique URL, you can begin creating your Event. Click on Events on the menu bar. This will display a list of Events, whether they are Active or Closed. Simply click on the Create Event button.



Then the page below will appear and you can begin filling out information about your Event.



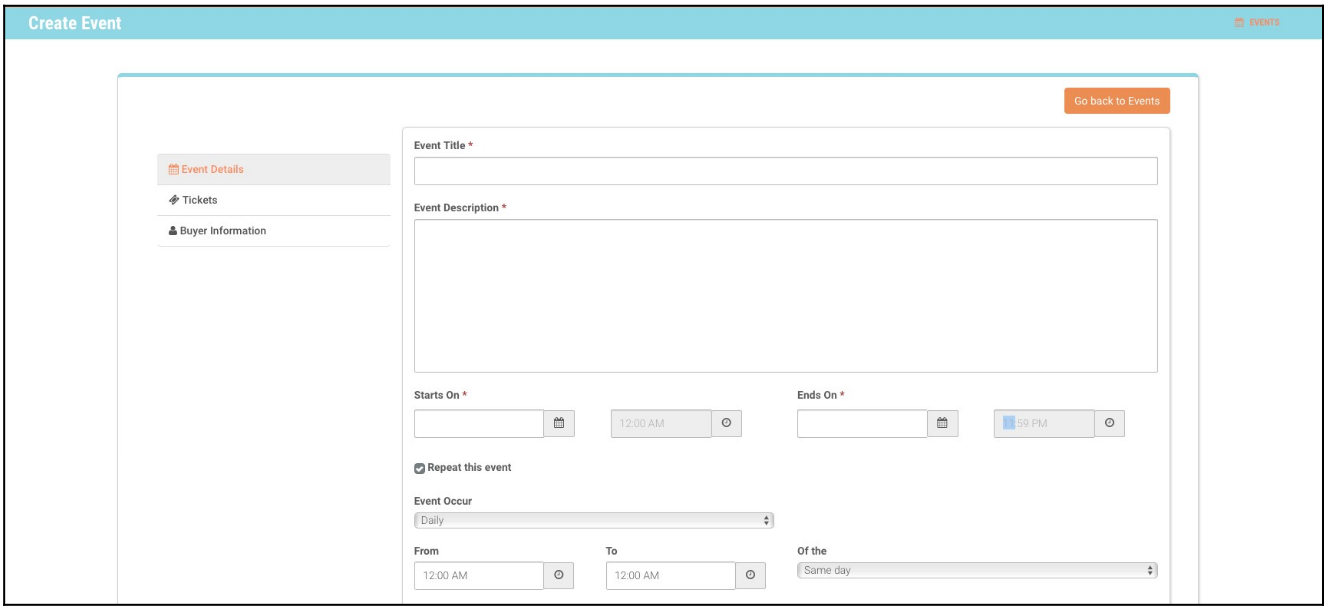
In order to create an Event, you will have to

1. Setup Event Details
2. Create Tickets
3. Request Buyer Information

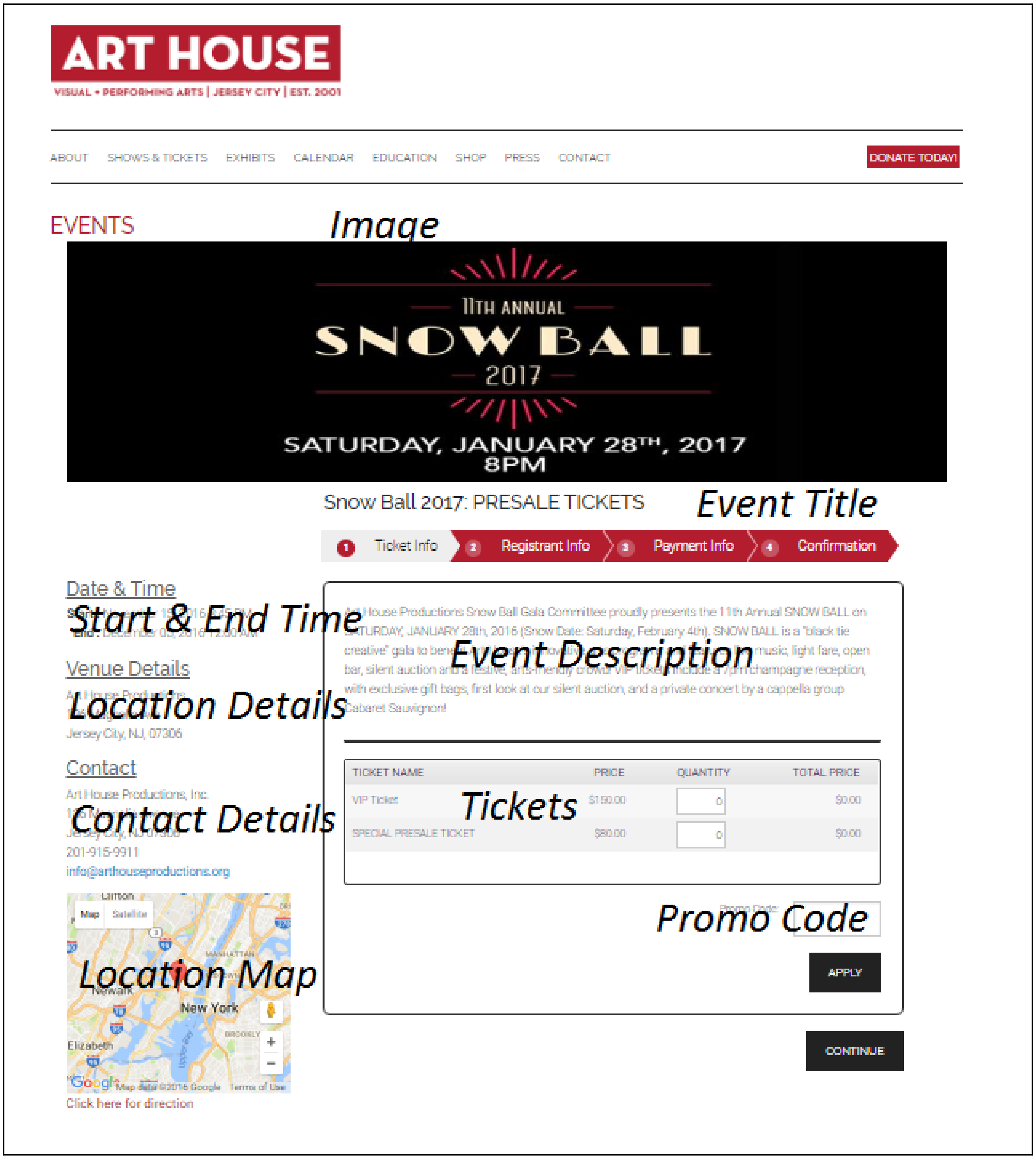
NEXT: HOW TO SETUP EVENT DETAILS?

SET-UP EVENT DETAILS

When you create an Event, a form opens for you to begin entering the details of your event.



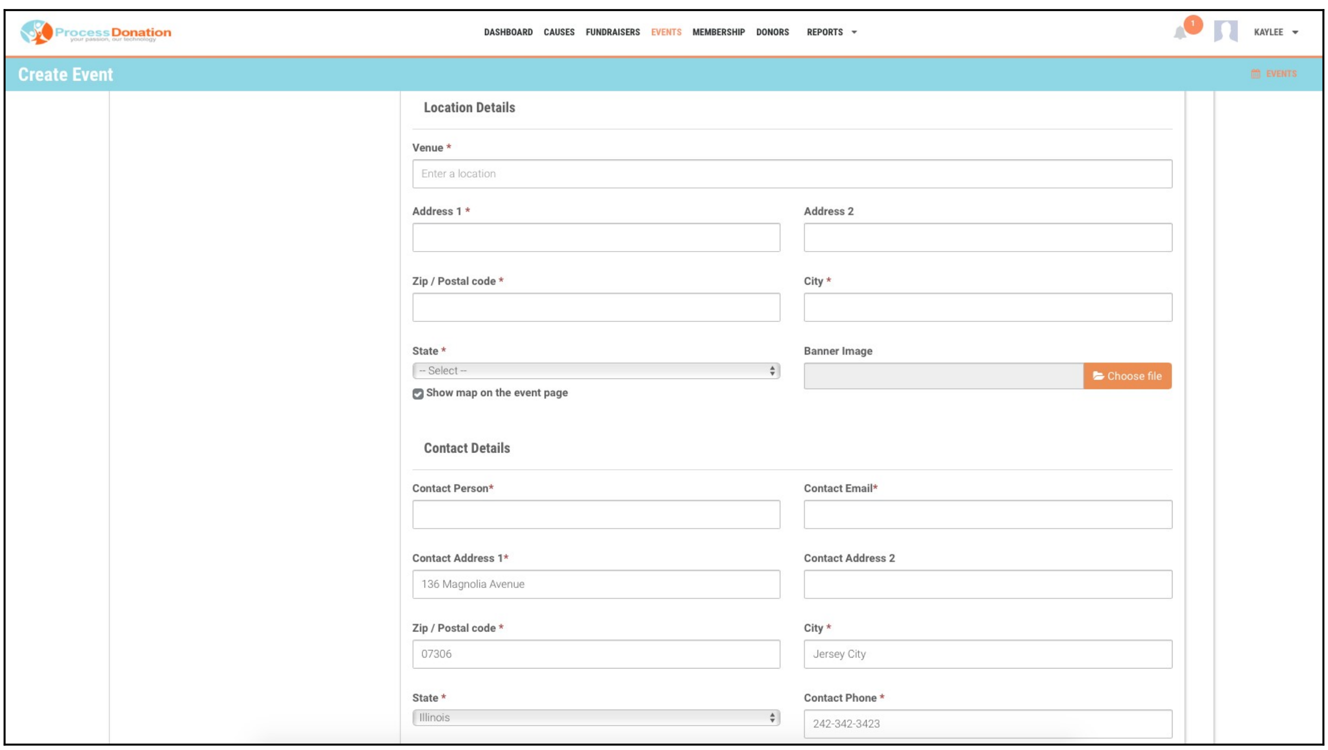
Here is an example of how an Event layout would look on the page. Of course, your website's unique branding will be represented.



1. **Event Title** – The name of your Event
2. **Event Description** – A description of the Event
3. **Starts On** – Set the start date and time of the Event

4. **Ends On** – Set the end date and time of the Event
5. **Repeat Event** – Check this box if this is a recurring Event, otherwise skip to Location Details.
6. **Event Occur** - Choose from the dropdown options - Daily, Weekly, Monthly
7. **Day of the Week** - Select the day of the week the event repeats (Only for Weekly events)
8. **Day** - Select the day of the month the Event repeats (Only for Monthly events)
9. **From** - Set the start time
10. **To** - Set the end time
11. **Of the** - Set if the Event is going to end the same day or the next day of the set end time

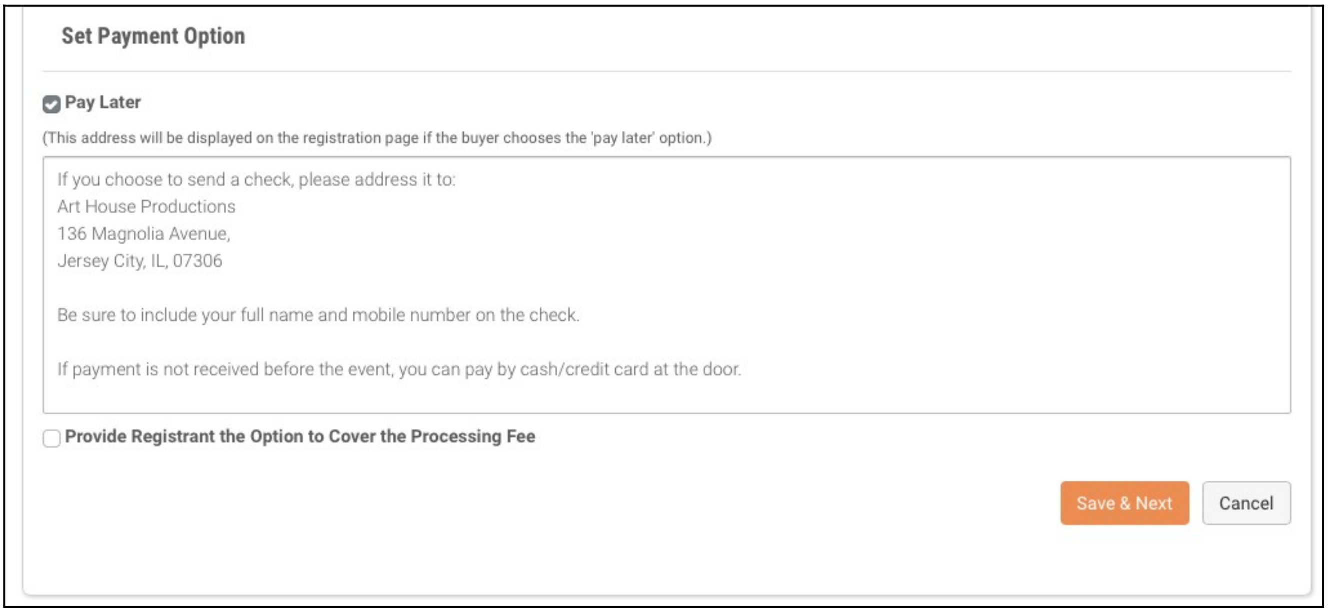
Location Details & Contact Details



12. **Venue** – Enter location of the venue, this will suggest appropriate addresses via autocomplete feature

13. **Address 1** – Address for the Event
14. **Address** 2 – Continuation of address for the Event
15. **Zip /Postal code** – Enter Postal code
16. **City** – Enter City
17. **State**– Enter State
18. **Banner Image** – Upload an image for the banner
19. **Show map on the Event page** – Show a map for the venue (from Google Maps)
20. **Contact Name** – Contact Person for the Event
21. **Contact Email** – Email address for the contact person
22. **Contact Address 1** – Address for the contact person
23. **Contact Address 2** – Address for the contact person
24. **Zip / Postal Code** - ZIP Code for the contact person
25. **City** - City for the contact person
26. **State** - State for the contact person
27. **Contact Phone** - Contact person's phone number

Set Payment Options



28. **Pay Later** – Check if you chose to have a pay later option if you are allowing a check to be mailed in instead of paying through the website.

29. **Text area -** Provide the address to mail check and instructions for the check.

30. **Provide Registrant the Option to cover the Processing Fee** - Provides you with the option of asking the registrant to cover the processing fee; once checked here, the default on the registration page will be to have the box checked. Registrant may uncheck the box to not cover the processing cost.

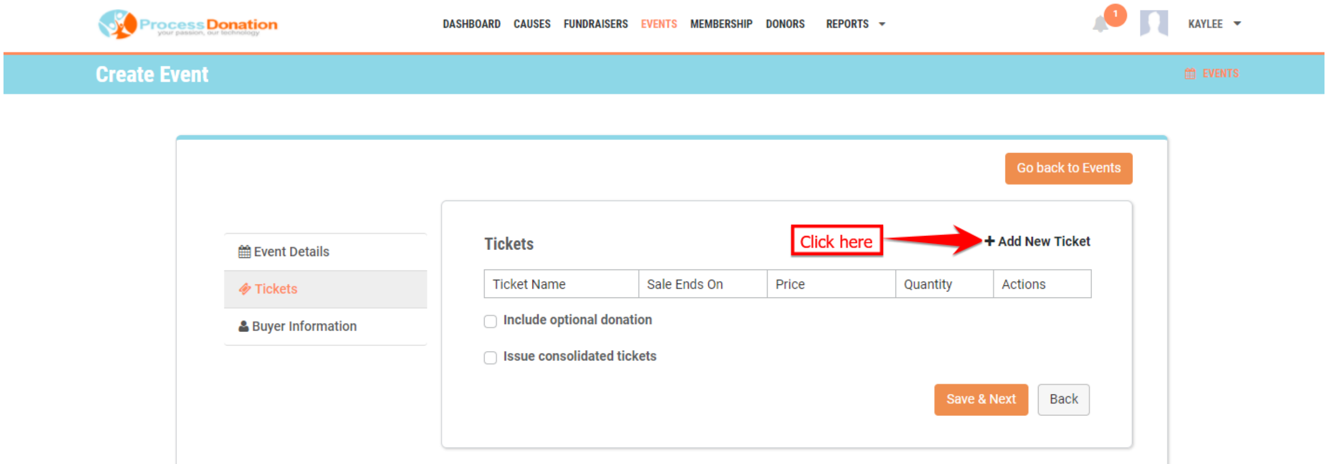
31. **Save & Next -** Click this button to save the information added and proceed to next phase of creating an Event i.e., creating Tickets for the Event.

32. **Cancel** - Click to cancel

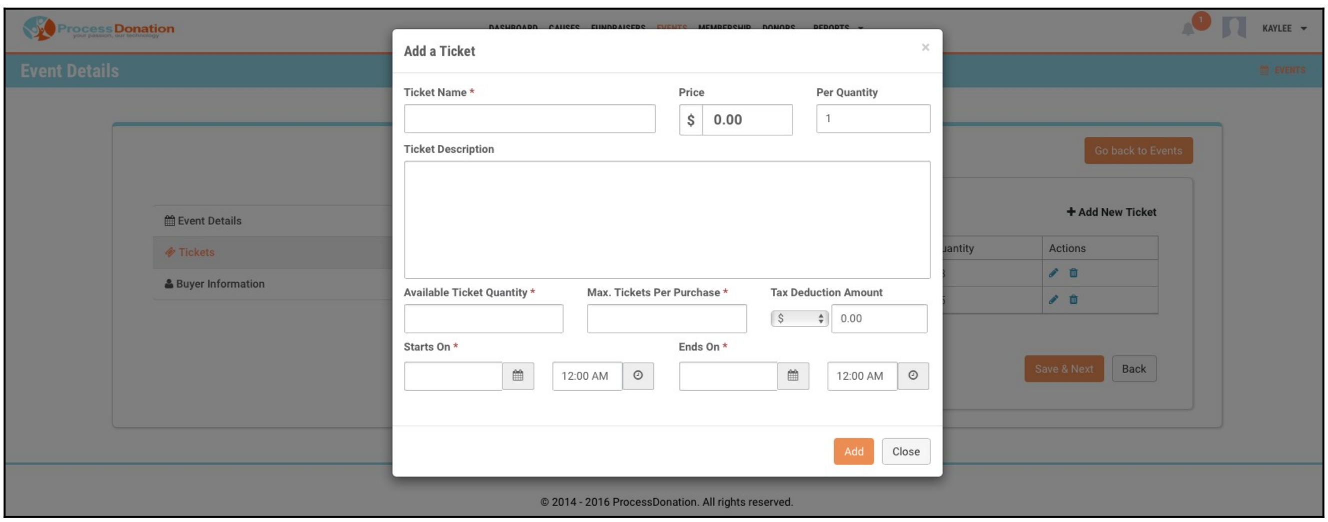
Next Step: How to add tickets?

ADD / EDIT TICKETS

To add a Ticket, click on **+Add New Ticket.**



That will create a pop-up box for you to fill out the Ticket details.

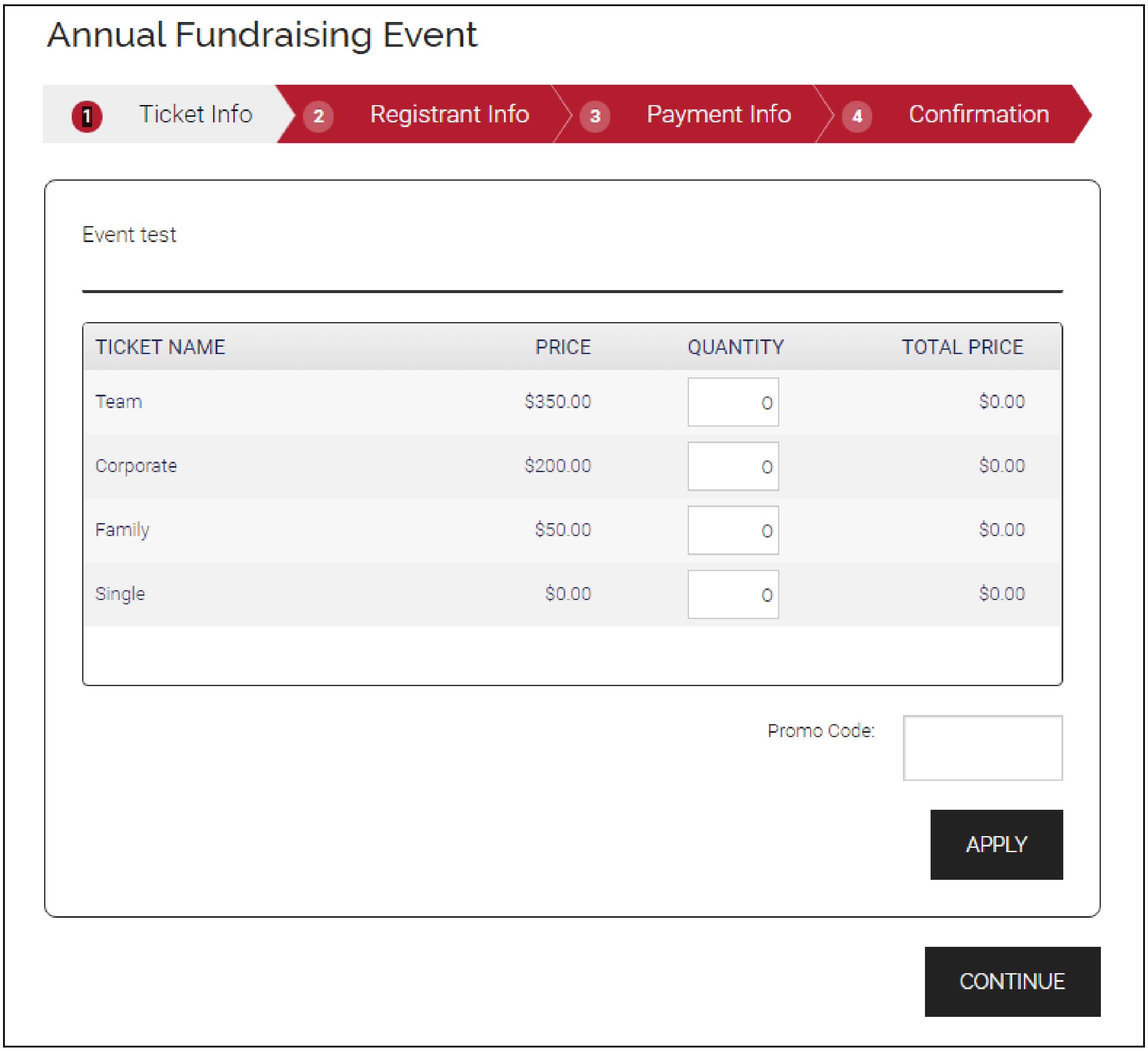


1. **Ticket Name** – Enter Ticket name so you can distinguish between different Tickets.
2. **Price** – Enter the Ticket price.
3. **Per Quantity** – Enter the number of Tickets you want to issue for the price. Generally, use a quantity of 1.
4. **Ticket Description** – Enter the description for the Ticket.
5. **Available Ticket Quantity** – Enter the total number of Tickets you want to sell for this Ticket type for this Event.
6. **Max. Tickets Per Purchase** – Enter the number of Tickets you want to limit to per

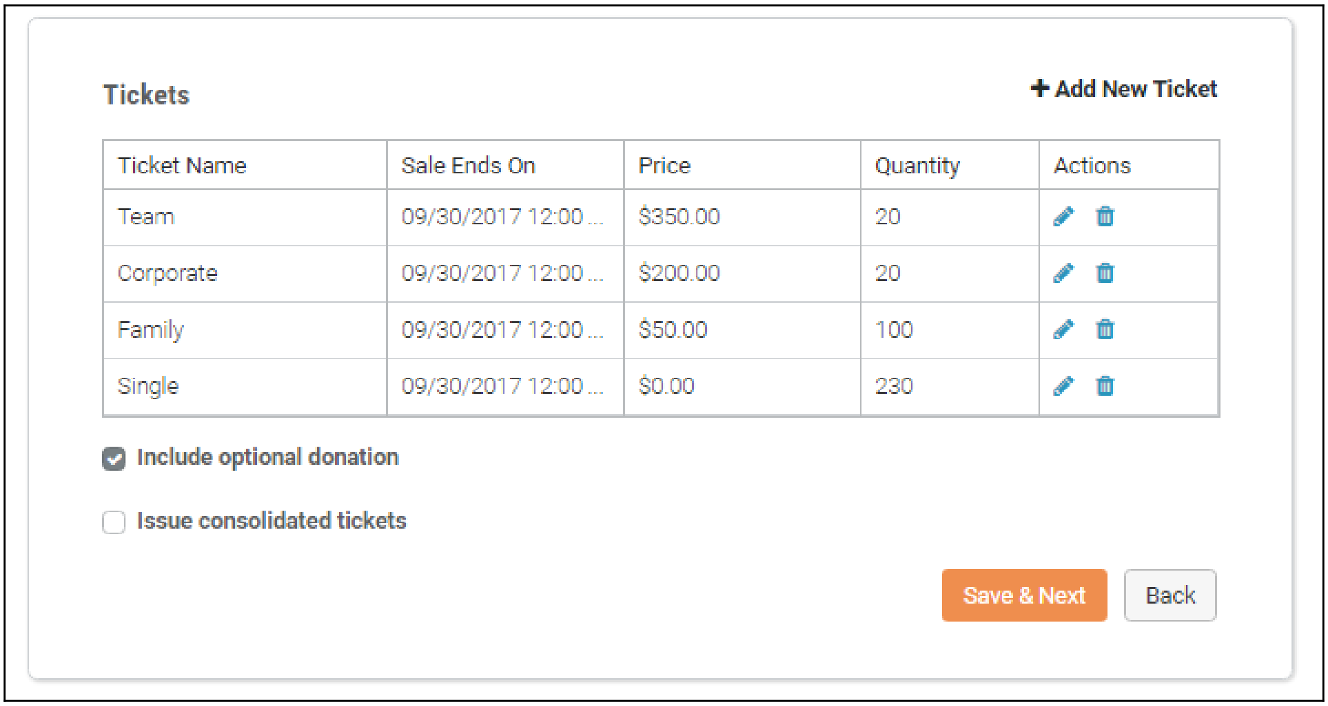
purchase.

7. **Tax Deduction Amount** – Enter the portion of Ticket price that is tax deductible either as an amount or a percentage; if 100% then leave it blank.
8. **Starts on** – Enter the date and time you want to start selling this Ticket type.
9. **Ends on** – Enter the date and time you want to end selling this Ticket type.
10. **Add** or **Close -** Click to Add to add this Ticket type or Close to cancel the action.

Here is how Tickets appear on the Event registration page:



You can also edit or delete existing Tickets by clicking on the appropriate icon.



Ticket Name	Sale Ends On	Price	Quantity	Actions
Team	09/30/2017 12:00 ...	$350.00	20	
Corporate	09/30/2017 12:00 ...	$200.00	20	
Family	09/30/2017 12:00 ...	$50.00	100	
Single	09/30/2017 12:00 ...	$0.00	230	

Include optional donation - Checking this box will give the registrant an option to donate to your nonprofit in addition to buying the Event Tickets.

Issue consolidated tickets - Checking this box will consolidate the ticket confirmation received by the registrant as a PDF attachment in the email. The registrant will receive one confirmation per Ticket type instead of one confirmation per attendee.

As an example using the picture above, if the registrant buys three Tickets of type Team, the ticket confirmation will include on page with the quantity specified as 3 instead of three separate pages.

Every Ticket confirmation page will have a unique QR code along with the registrant details for you to identify the registrant at the time of check in by using our mobile app.

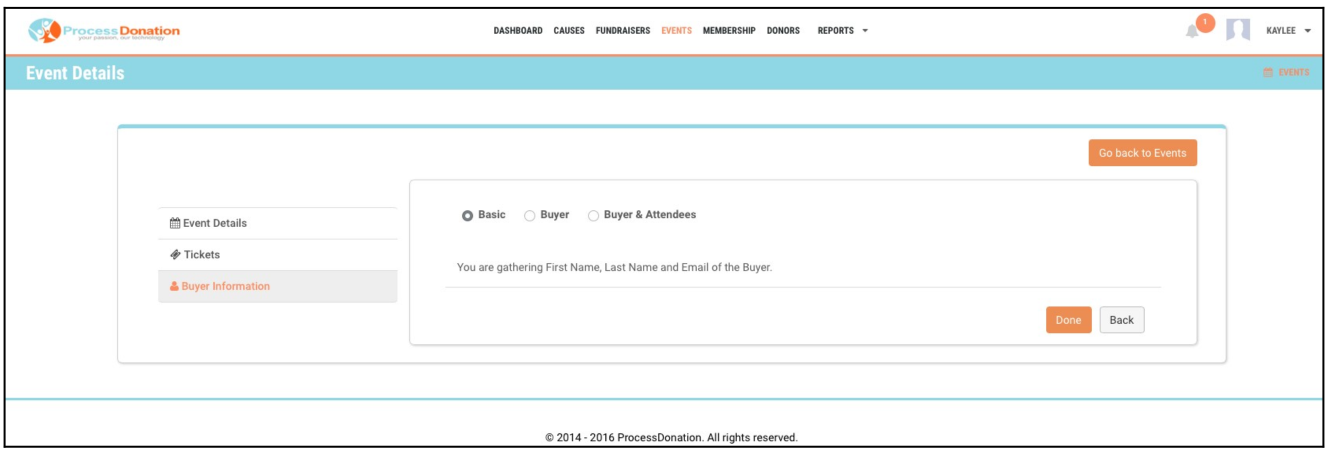
Next Step: Add Buyer Information

BUYER / ATTENDEE INFORMATION AND CUSTOM QUESTIONS

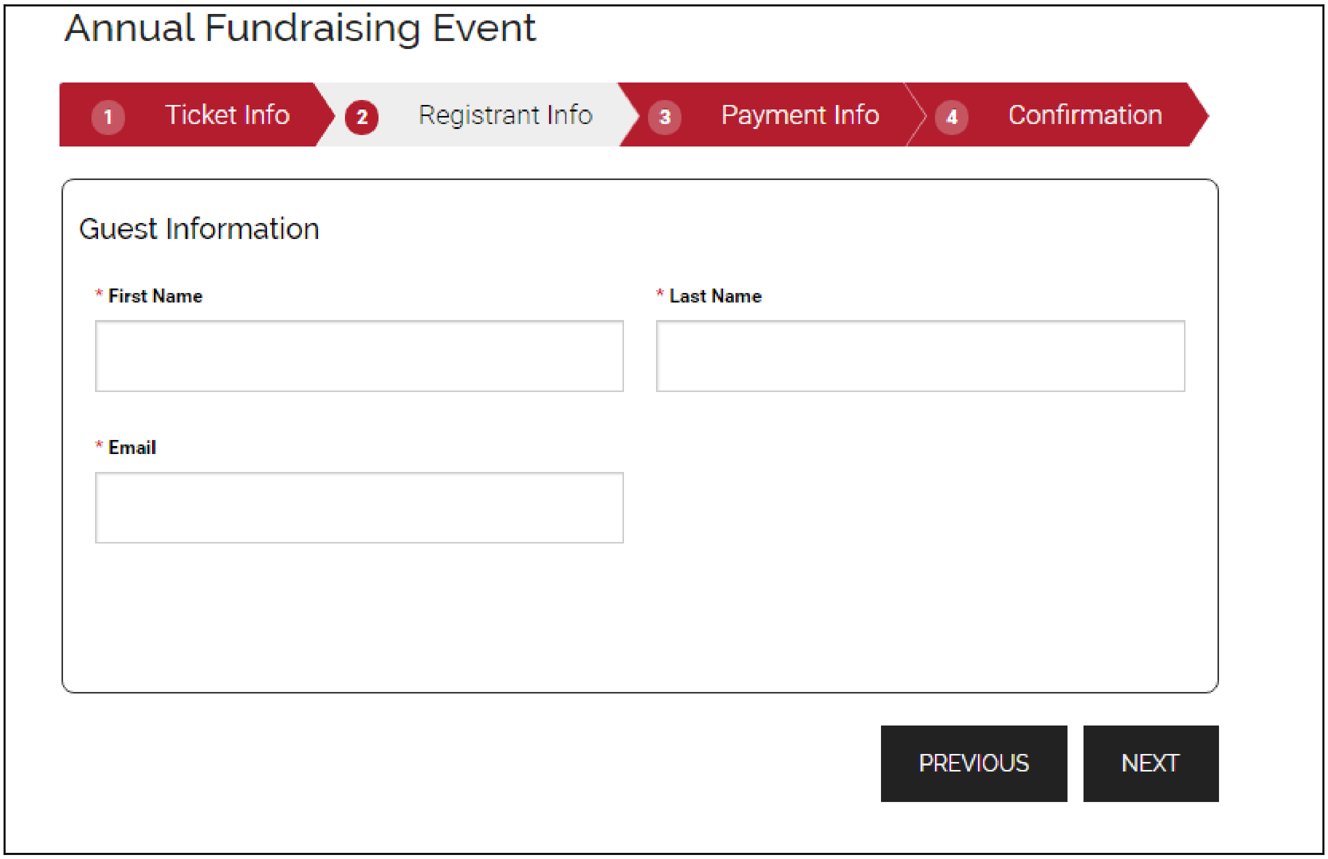
In this step, you get to choose what information to collect from the registrants. The registrant who buys the tickets is the Buyer and if they buy the tickets for others as well, those other people are termed as Attendees. You can collect different set of information for the Buyer and Attendees. There are three ways you can collect this information.

1. **Basic**

Under **Basic**, the information gathered will be First Name, Last Name and Email of the Buyer.

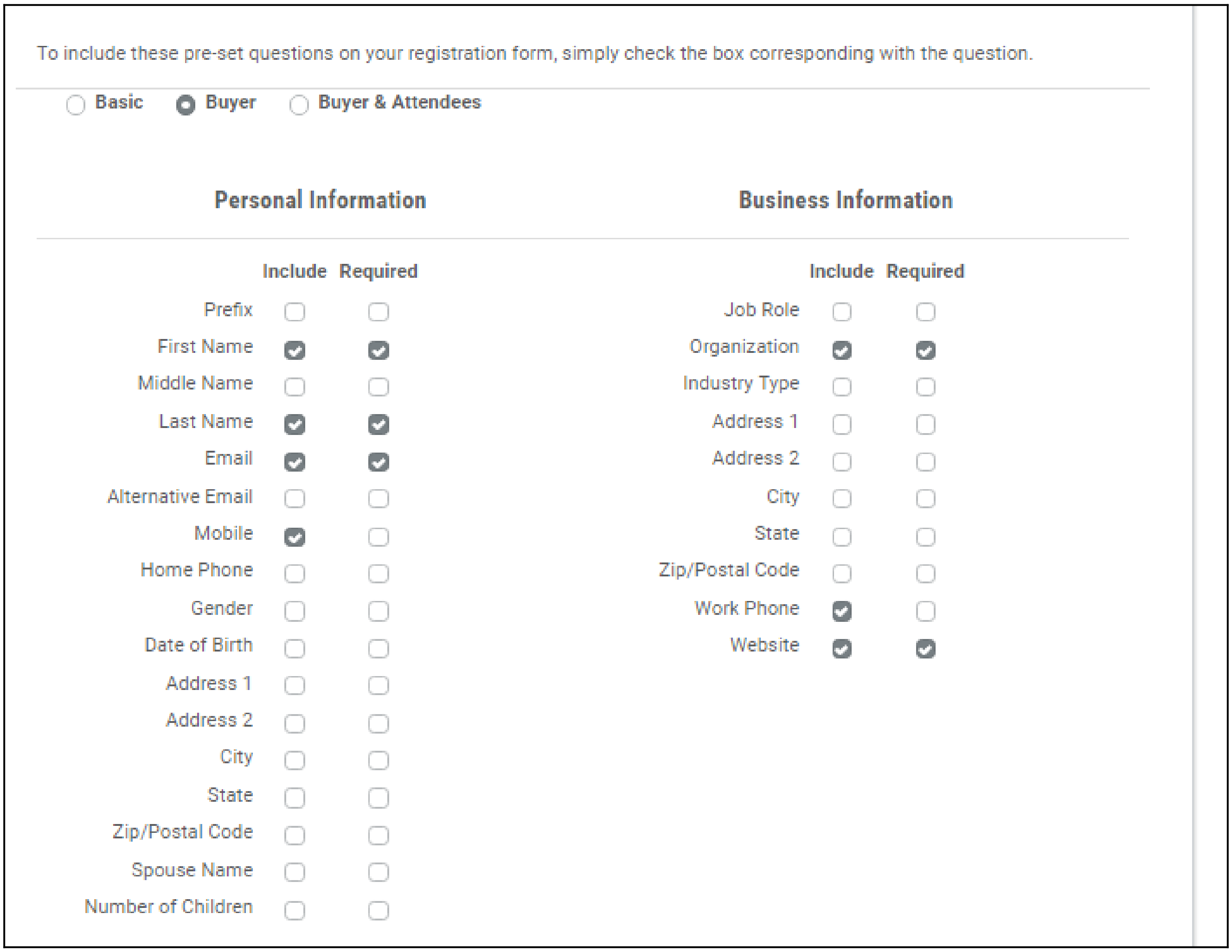


In the event registration page, the Buyer will be prompted to enter First Name, Last Name and Email as shown below.

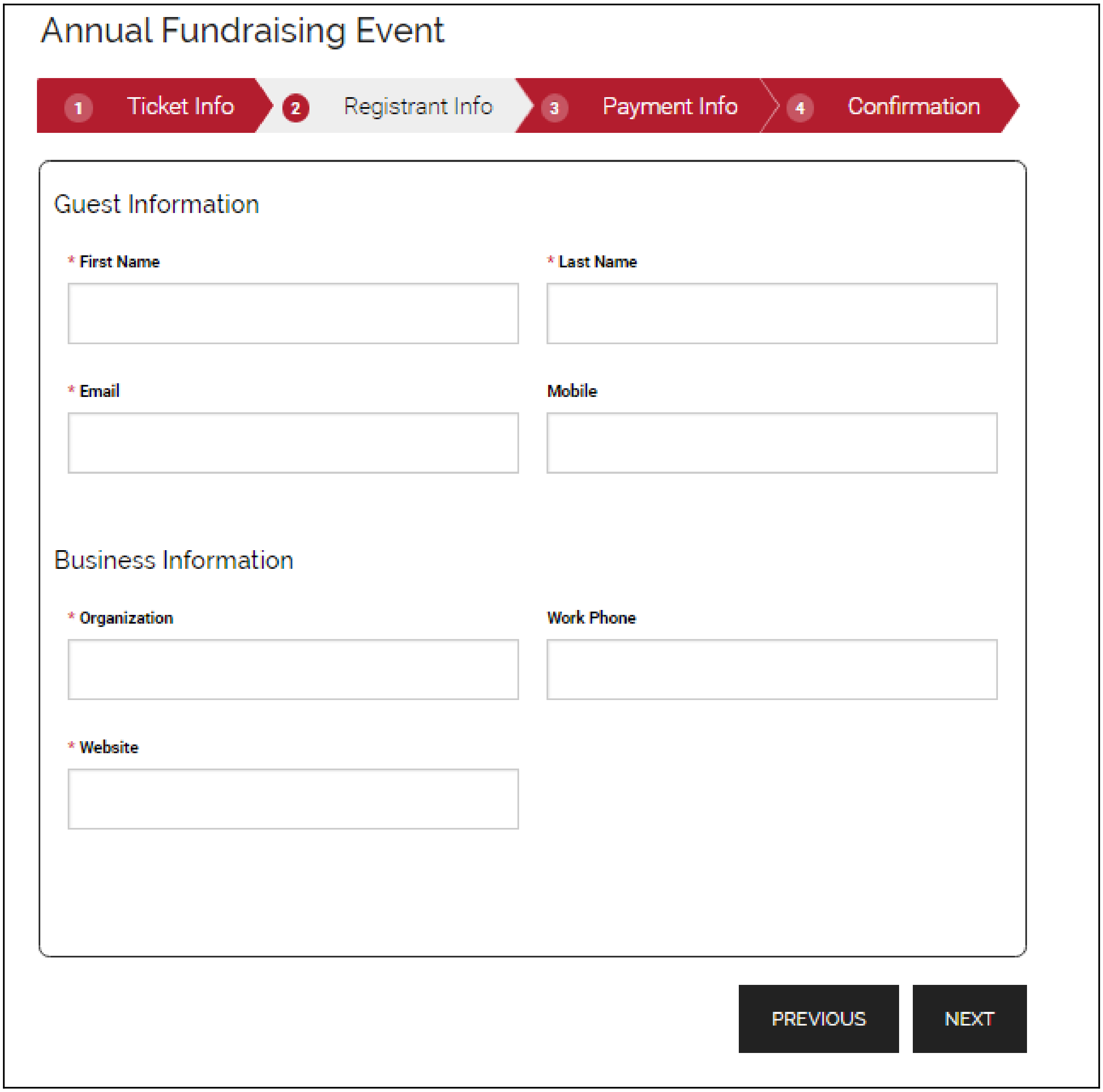


2. Buyer

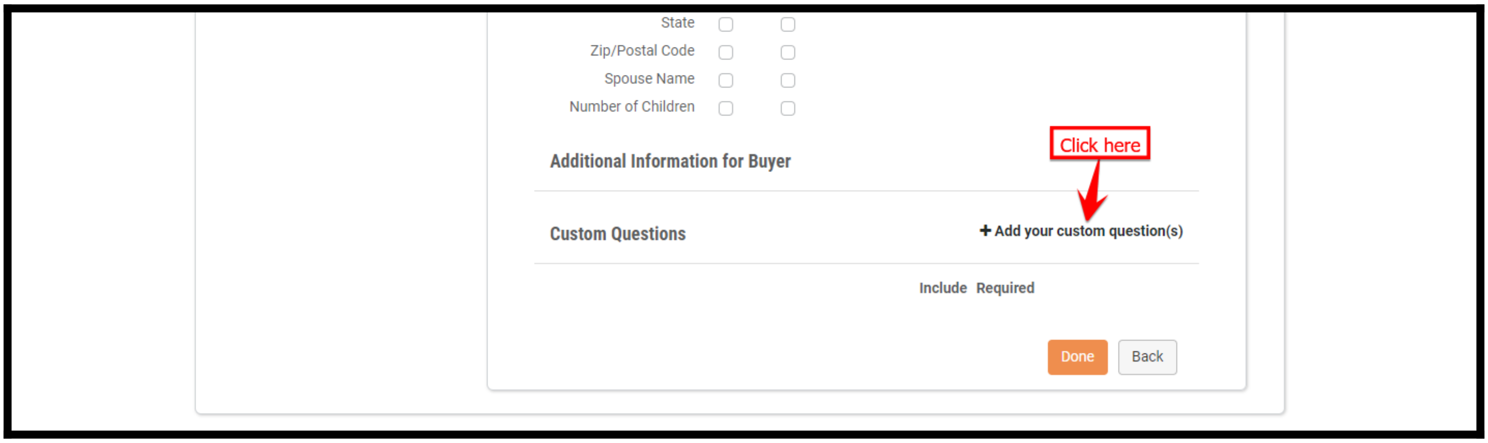
You can choose to collect the listed fields from the Buyer. You can also add custom questions if you do not find the fields you need. Check Include next to the field to make it optional for the Buyer to fill in and check Required if you want to make it a mandatory field. You can exclude a field by unchecking both the check boxes next to the field.

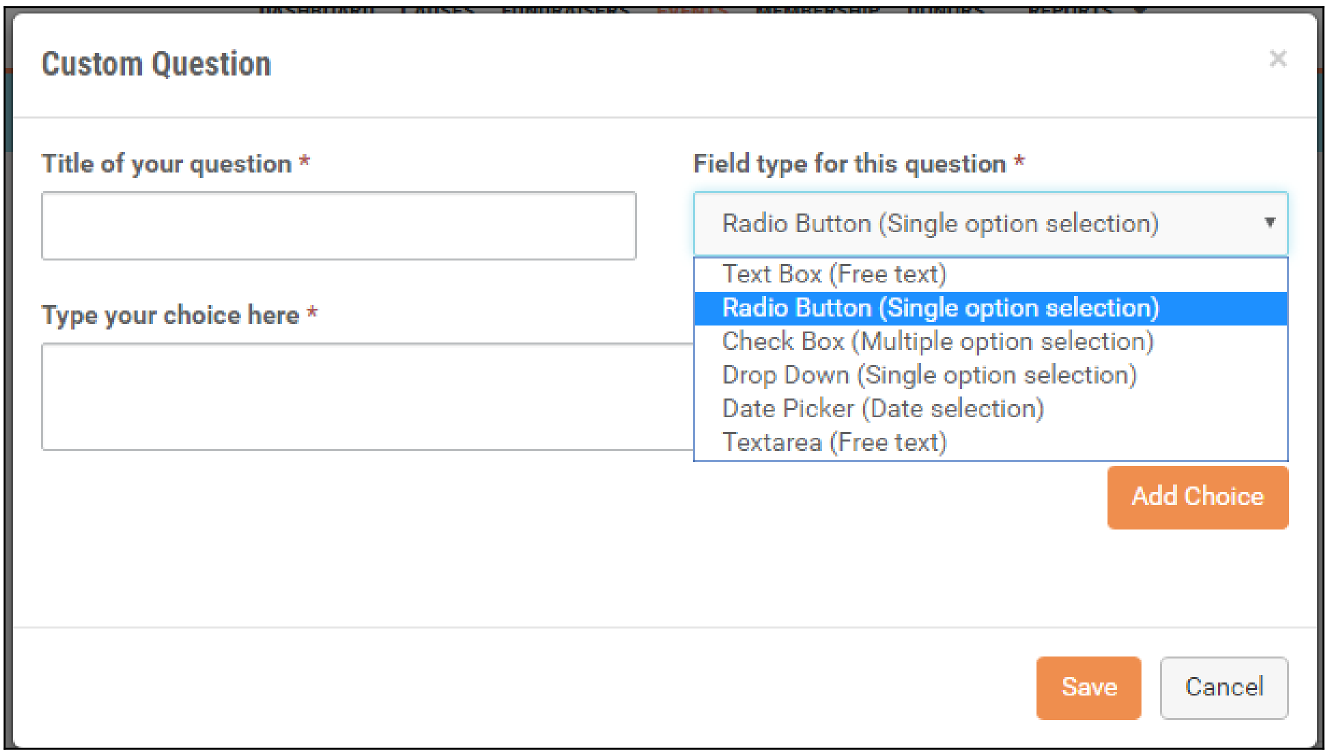


Personal Information and Business Information appears in two different sections in the event registration page as shown below.



You can always add a custom question(s) to collect information from the Buyer. To add a custom question, click on Add your custom question as shown below.





Title of your question - This will appear as the label for the information you are requesting from the Buyer.

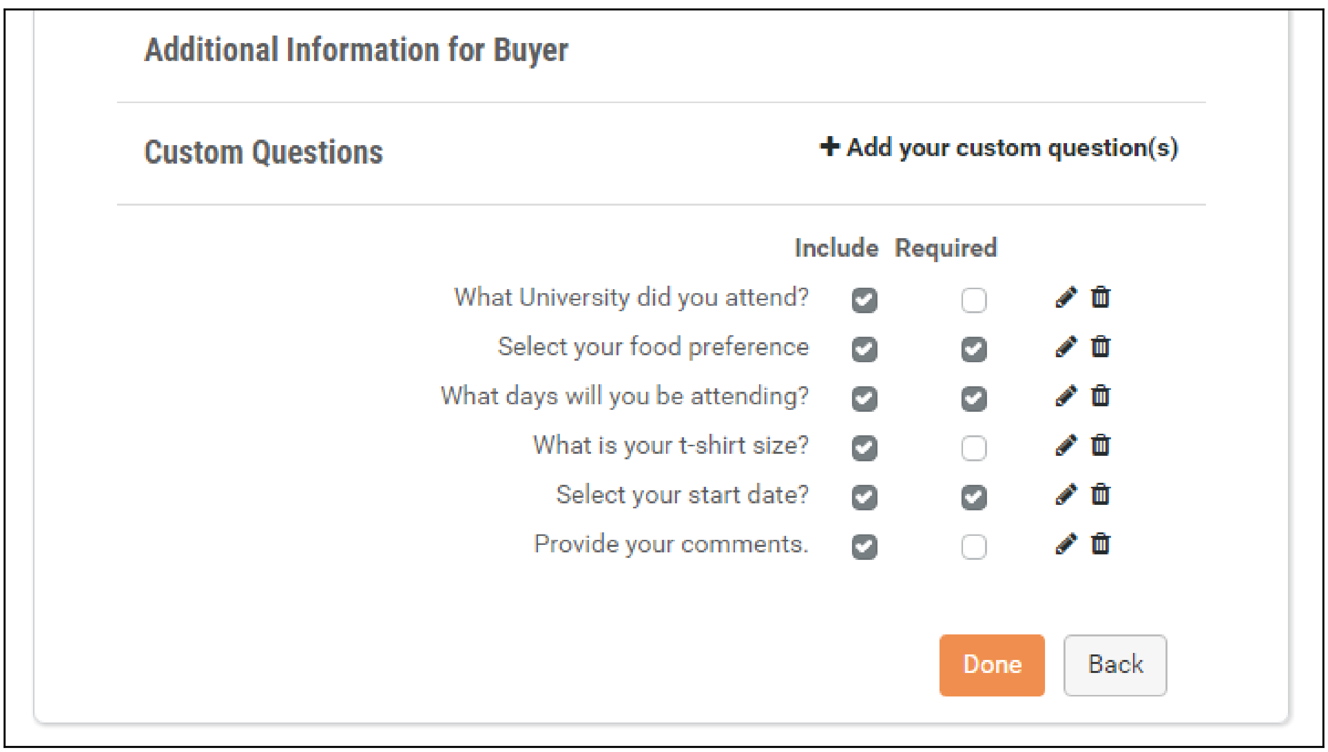
Field type for this question - This describes what type of answer you expect from the Buyer for this custom question.

- **Text Box (Free text)** - This will create a text box for an answer.
- **Radio Button (Single option selection)** - This will create a Radio Button with different options customized by you.

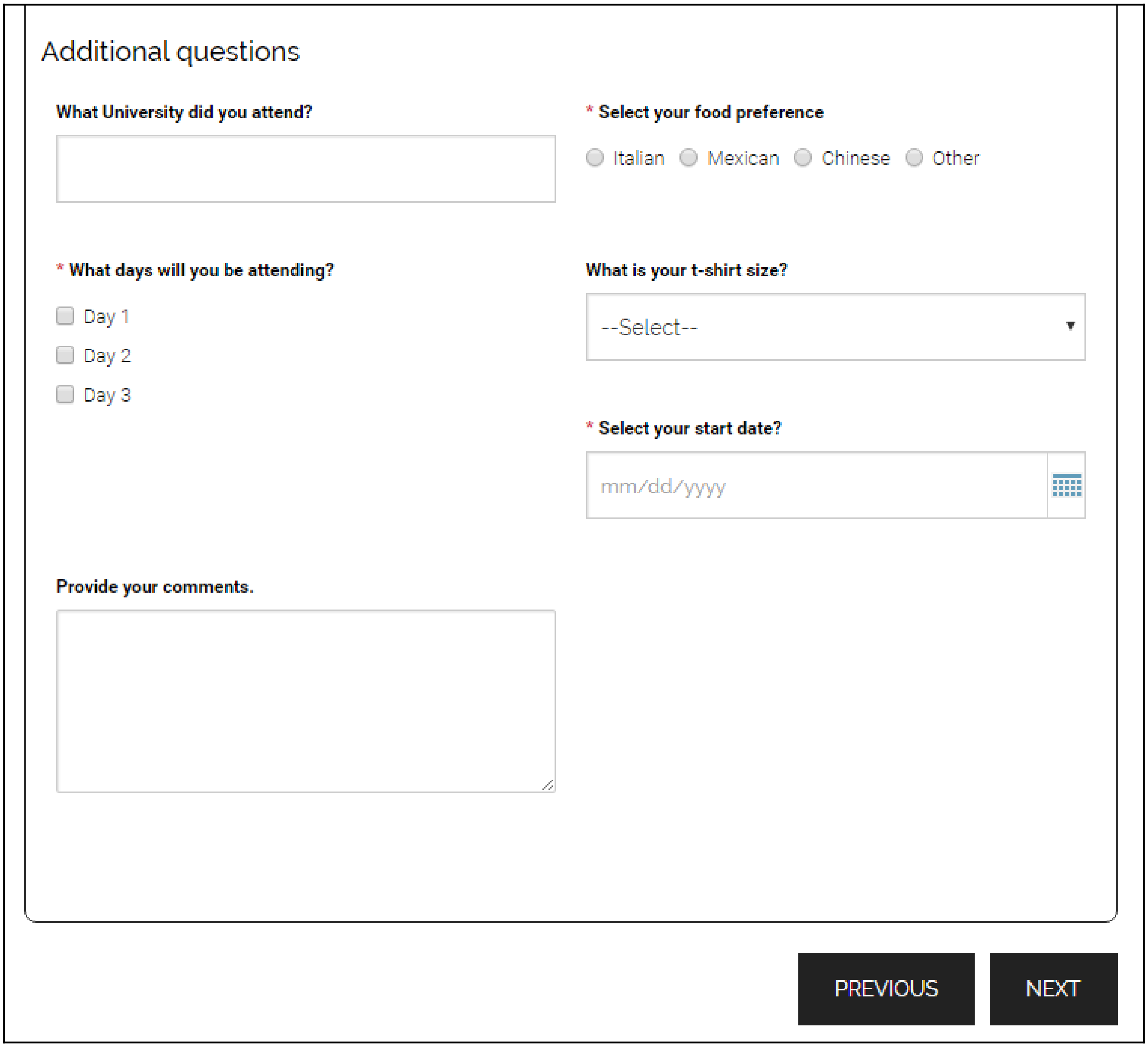
- **Check Box (Multiple option selection)** - This will create a Check Box where the Buyer can select multiple options customized by you.
- **Drop Down (Single option selection)** - This will create a Drop Down where the Buyer can select a value from a list you create.
- **Date Picker (Date selection)** - This will create a Date Picker control where the Buyer can select a date.
- **Textarea (Free text)** - This will create a much bigger text box if the expected answer is too long to fit in a Text Box.

Type your choice here - This is where you add different options for the Buyer to select from. This only applies when you select Radio Button, Check Box, or Drop Down in Field type for this question. You can add one or more options by clicking Add Choice button each time.

You can make the custom questions optional or required by checking the appropriate box right next to the custom question. You can also edit or delete a custom question by clicking on the appropriate icon.



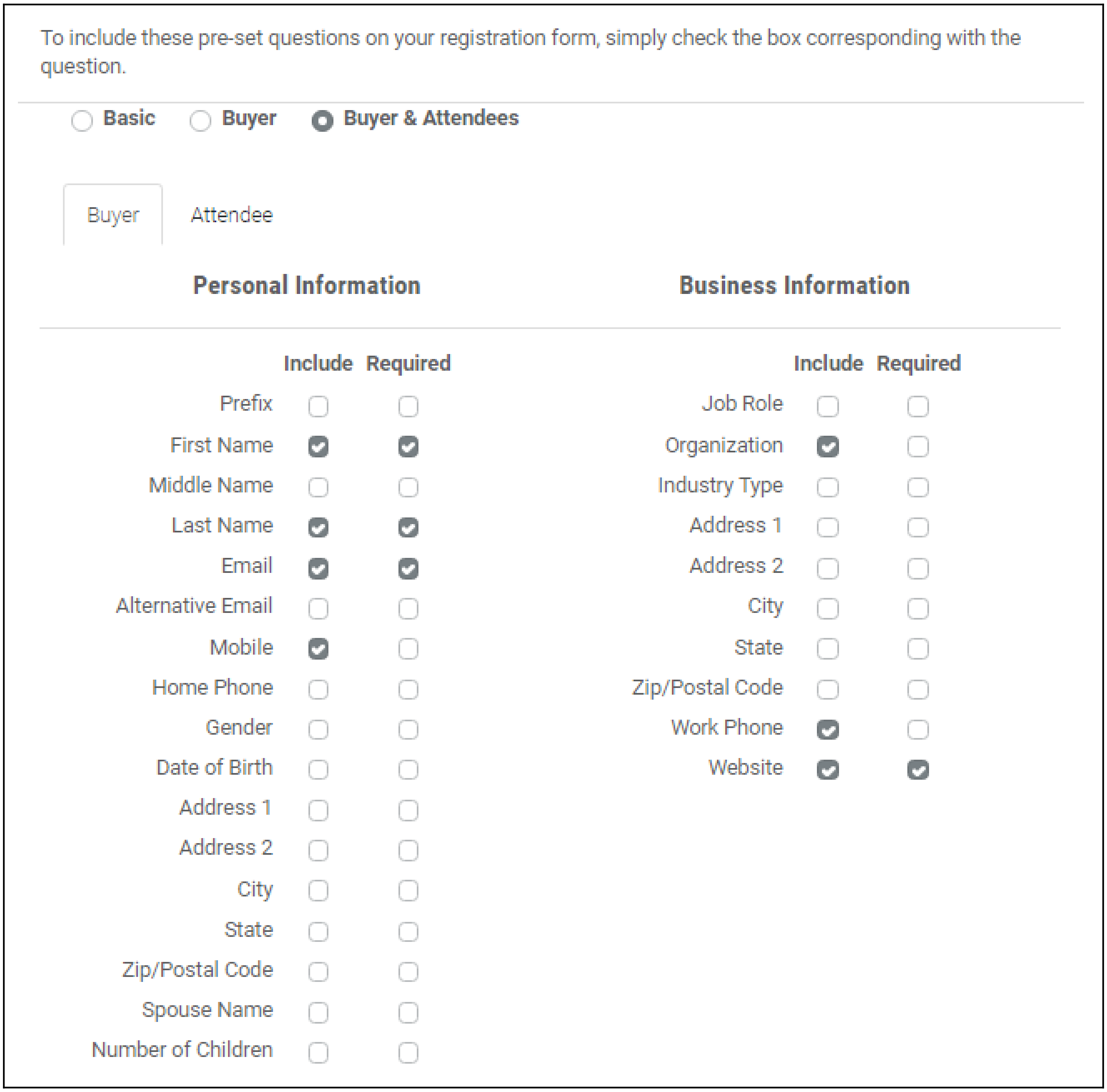
Here is how the questions appear in the event registration page.



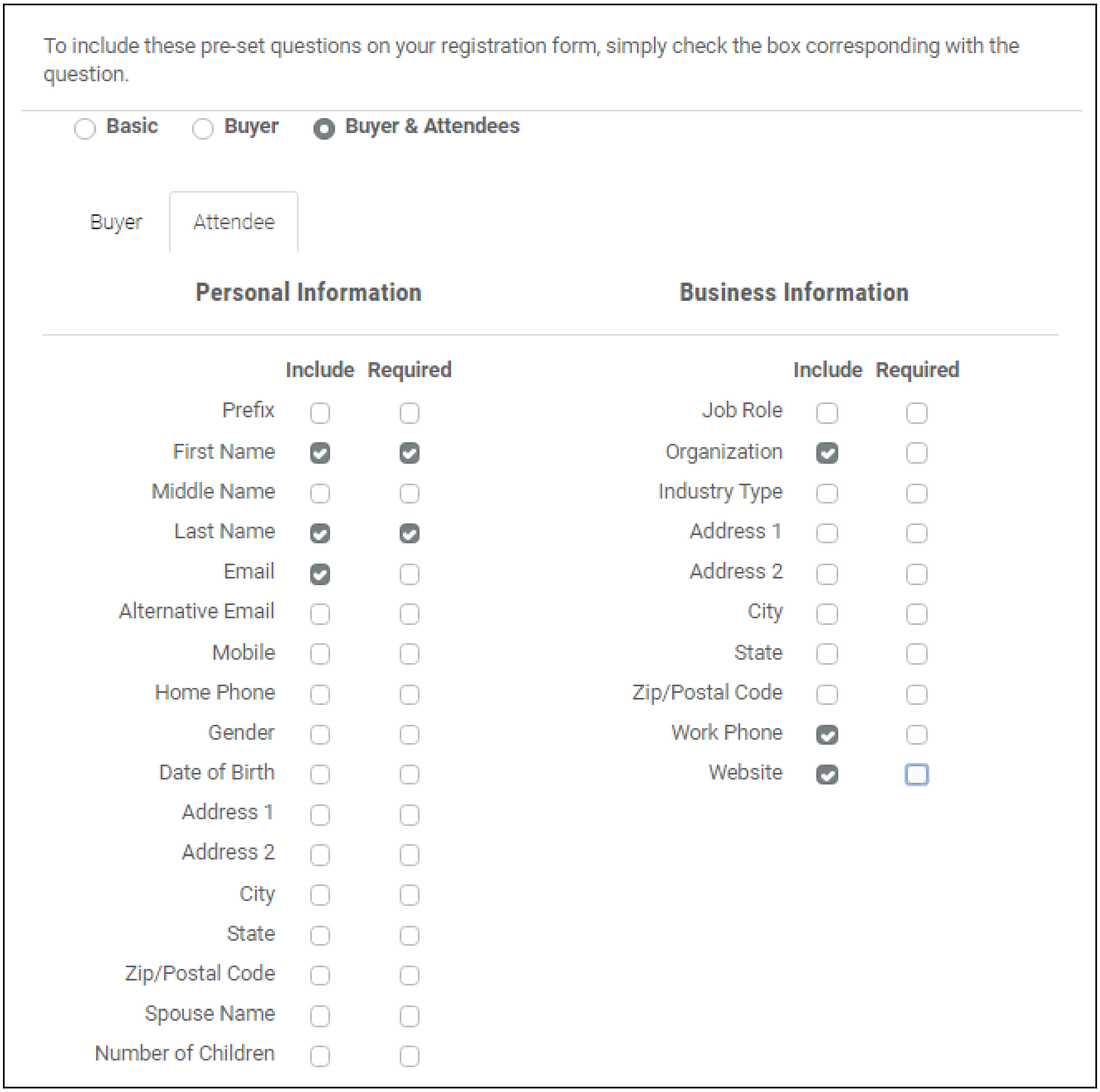
3. **Buyer & Attendees**

You can choose to collect the listed fields from the Buyer as well as the Attendees. You can also add custom questions if you do not find the fields you need. Check Include next to the field to make it optional for the Buyer to fill and check Required if you want to make it a mandatory field. You can exclude a field by unchecking both the check boxes next to the field.

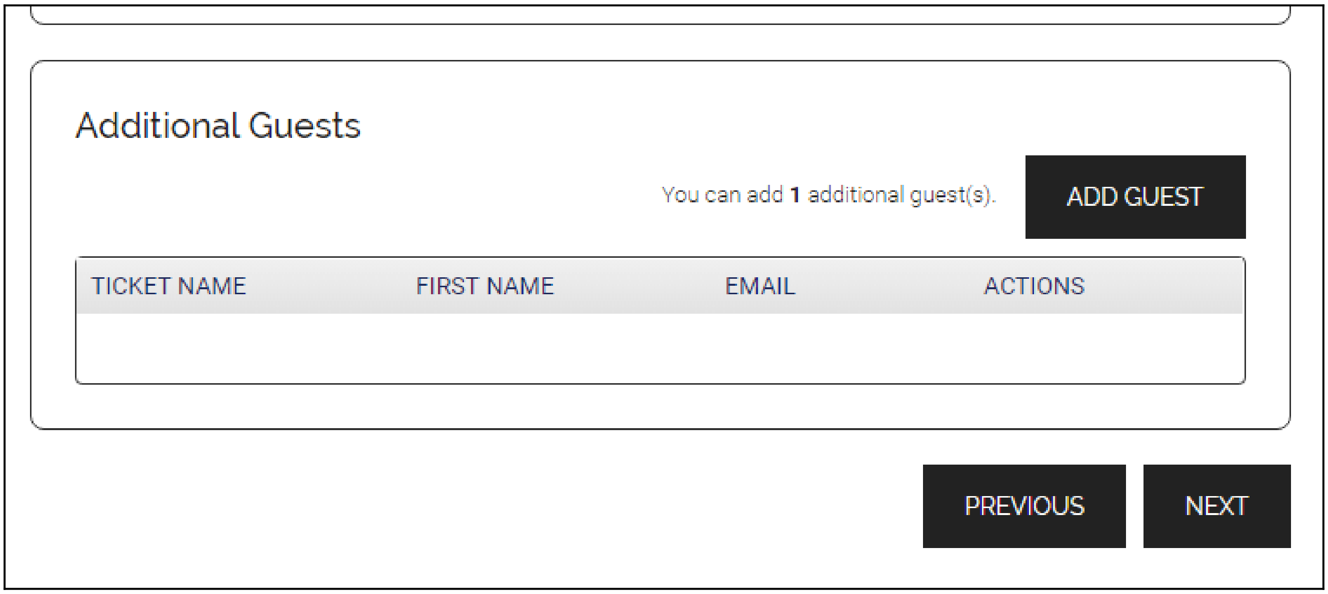
Notice the Buyer tab is selected:



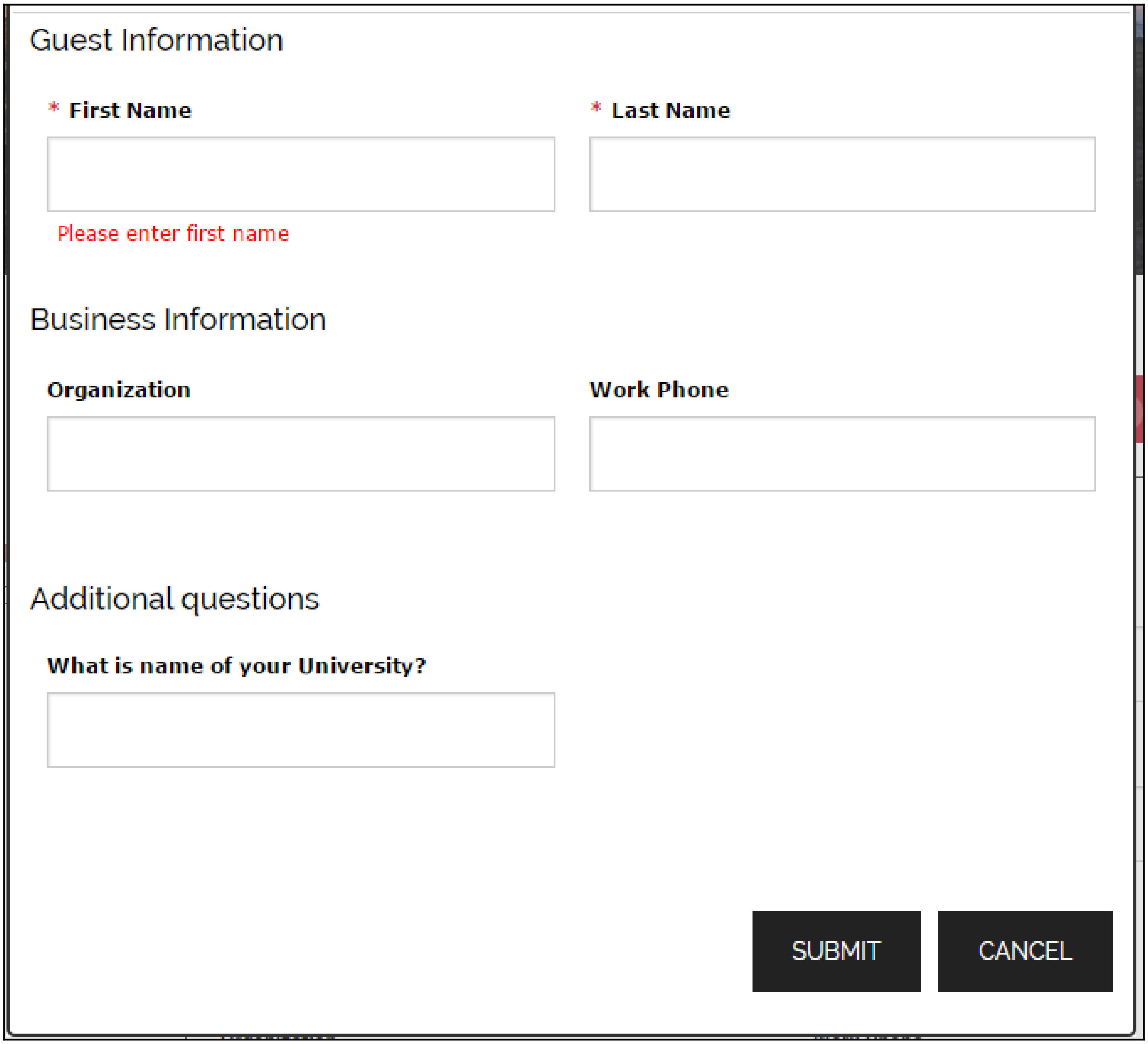
And here is where you would enter the Attendee details.



When the Buyer buys more than one ticket, the event registration page will automatically request the Attendee information.



Depending on the type of information you want to collect for the Attendee, the Event registration page will prompt for that information when the Buyer clicks on Add Guest as shown below.



After you are done with the last step in creating an Event, click on Done. You will be prompted to confirm your action by clicking on OK button in the pop up that confirms the Event is saved.

[NEXT: HOW TO LINK THE EVENT PAGE TO YOUR WEBSITE?]

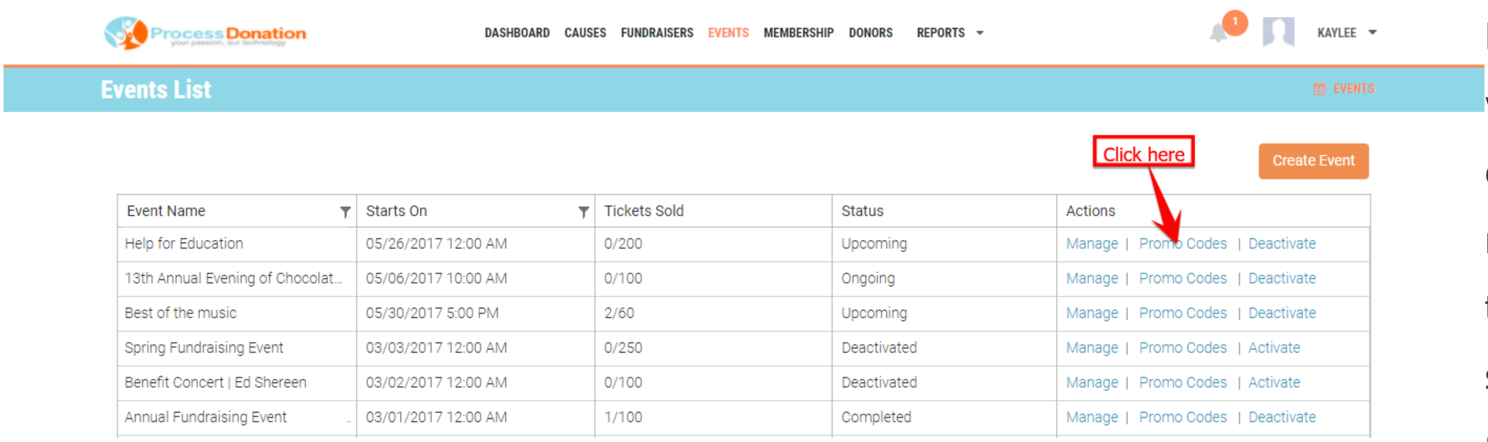
LINK THE EVENT PAGE TO YOUR WEBSITE

Once we have created your Custom Events Template, after you create an Event, it generates a URL for the Event page automatically. This URL should then be connected to the appropriate tab or button on your website.

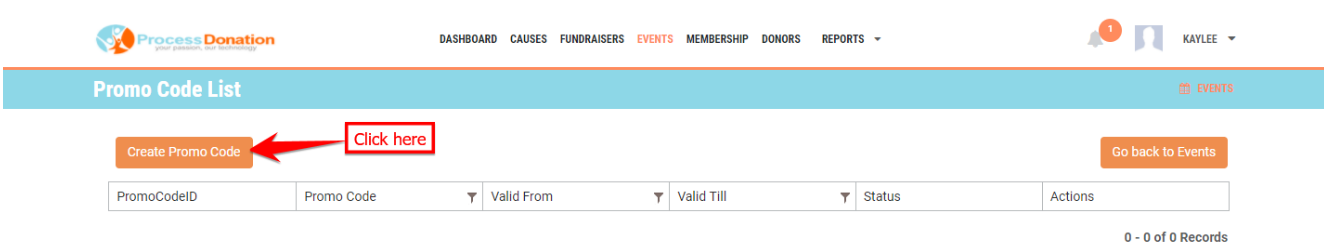
CREATE / MANAGE PROMO CODES FOR EVENTS

Promo Codes (Aka Discount Codes) can help you attract supporters in large numbers in order to make your Events successful. Promo Codes (such as an early bird discount), incentives for participants on sign up, track which social media channel is the most productive in bringing attendees to your Event, below are the steps that will help you add this feature.

To create Promo Codes for the Event that way the users can avail certain benefits while purchasing Event Tickets, click on **Promo Codes** link corresponding to the Event from the Events page.

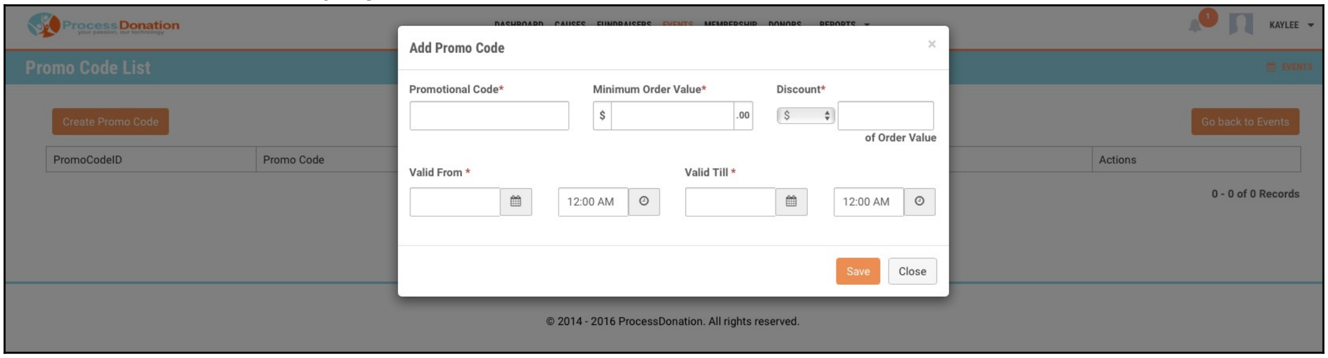


On the next page i.e., **Promo Code List** page click on **Create Promo Code** button



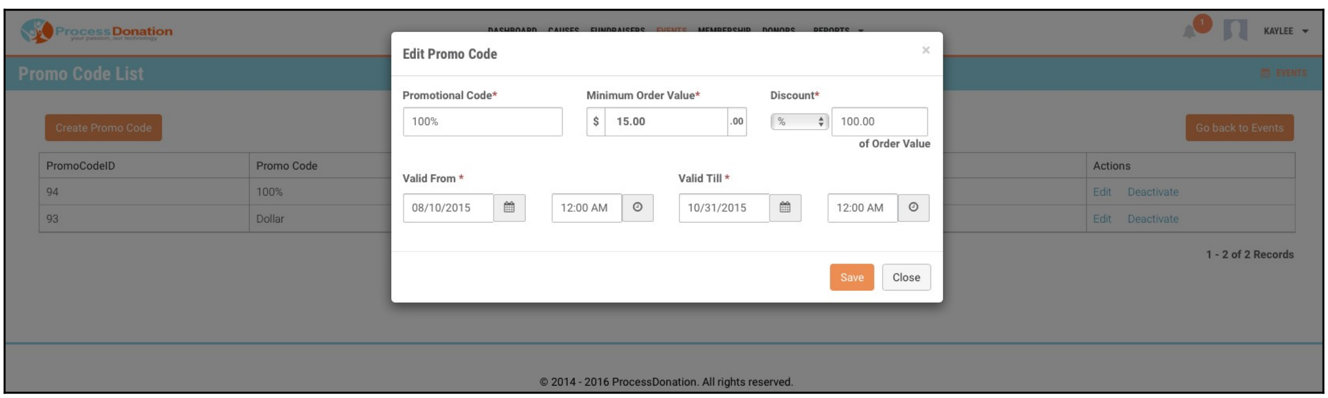
- **Promotional Code** – Enter name/code you want to assign to a Promotional Code

- **Minimum Order Value** – Define the condition
- **Discount** – Define the discount you want to allow for users, using this Promotional Code
- **Valid From** – Select the start date and time for the Promotional Code
- **Valid Till** – Select the expiry date and time for the Promotional Code

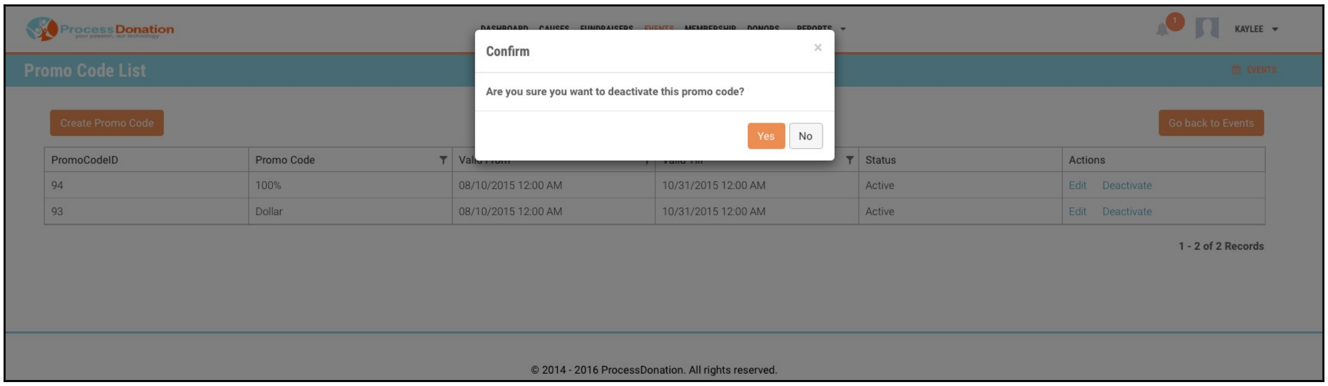


Upon clicking on S**ave** button the Promo Code will be saved.

With the option to Edit you may choose to edit a Promo Code.



You may choose to deactivate an existing Promo Code by simply clicking on Deactivate link corresponding to the Promo Code ID and confirm your action.


Promo Code List
Create Promo Code
Go back to Events
Confirm
Are you sure you want to deactivate this promo code?
Yes
No
PromoCodeID
Promo Code
Status
Actions
94
100%
08/10/2015 12:00 AM
10/31/2015 12:00 AM
Active
Edit
Deactivate
93
Dollar
08/10/2015 12:00 AM
10/31/2015 12:00 AM
Active
Edit
Deactivate
1 - 2 of 2 Records
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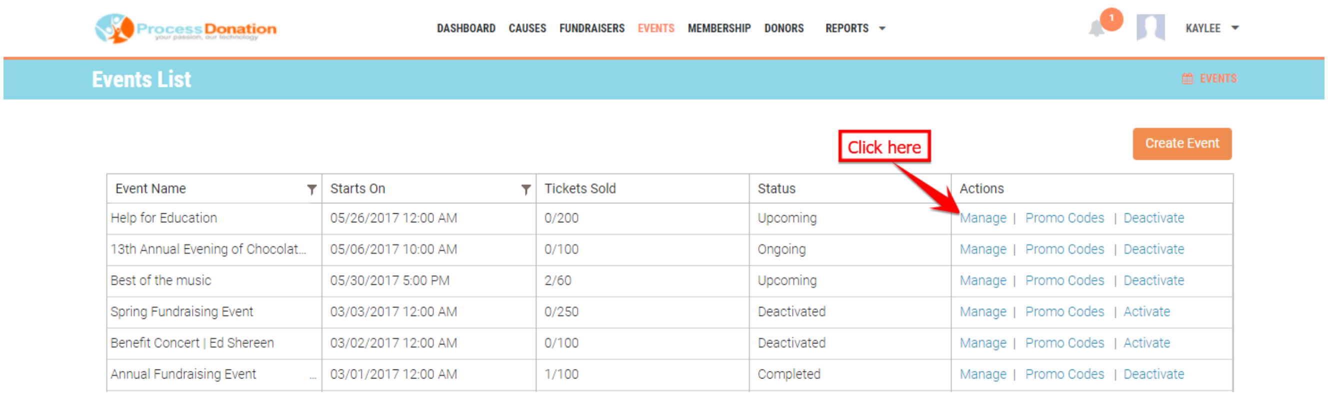
MANAGE AN EVENT

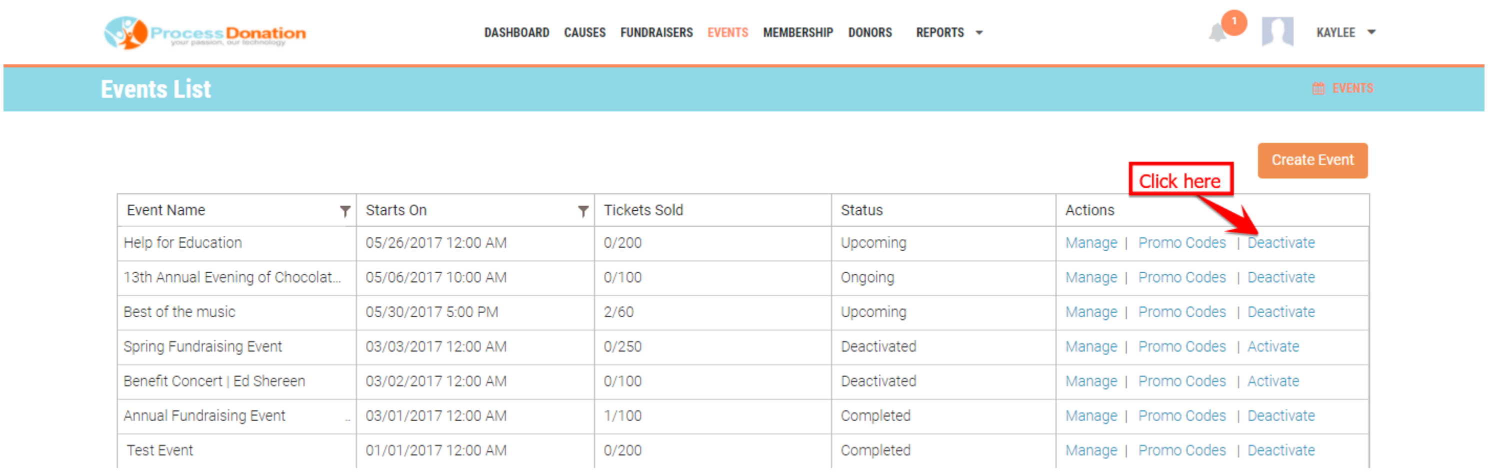
You can always update the Event information like name or description. You can also add/remove Ticket types or update Ticket pricing. You can also deactivate the Event by clicking on Manage under Actions.



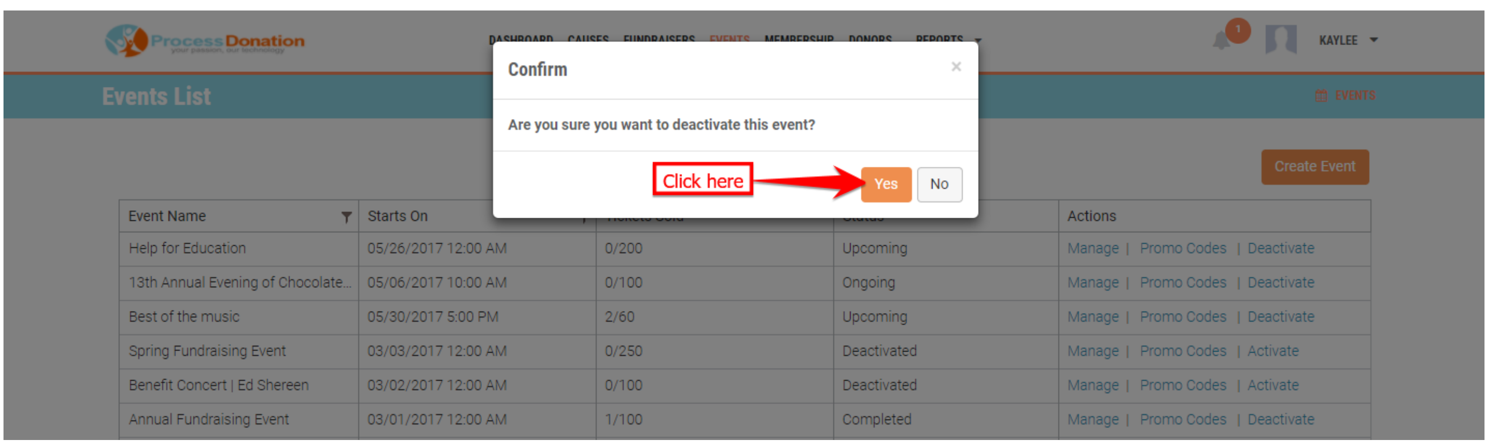
DEACTIVATE AN EVENT

To deactivate an existing Event, simply click on the **Deactivate** link corresponding to the Event and confirm the action by clicking on Yes. There is no option to delete an Event because if an Event were deleted it would ruin the Reporting, so instead you will need to Deactivate the Event.

If you wish you deactivate an existing Event, simply click on **Deactivate** link corresponding to the Event.



Confirm your action by clicking on Yes.

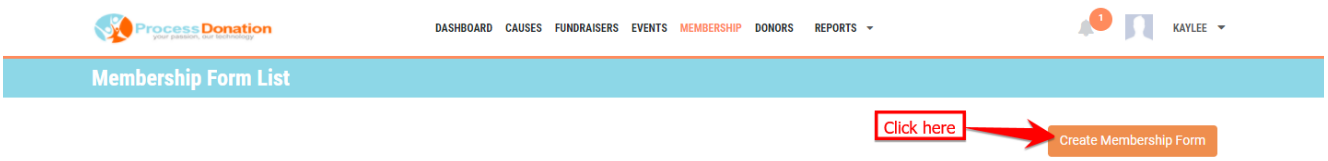


Deactivated Events will continue to appear in the Events page with Activate link in place of Deactivate. So you can toggle the status between active and inactive by clicking on the link with the opposite word. An Active Event can be Deactivated and an Inactive Event can be Activated.

INTRODUCTION TO MEMBERSHIPS

(Premium & Ultimate)

The Membership module is designed to give you the ability to easily group the members to organization, sell Membership levels and collect information from the Members. It also supports Promo Codes to offer discounts for Memberships. With the ability to view the list of Members and the Membership levels sold as well as export them to Excel, CSV, or PDF.

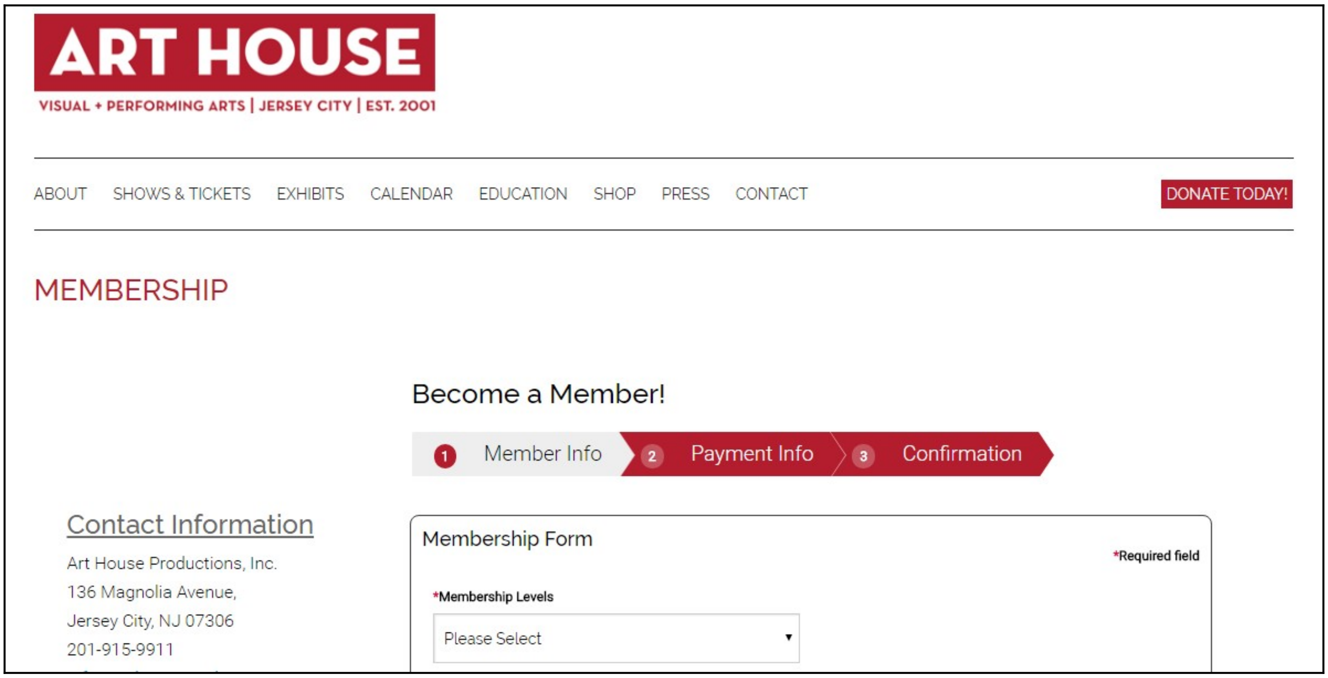


Click on **Create Membership Form** to create a membership form.

NEXT: DESIGN A CUSTOM MEMBERSHIP TEMPLATE

DESIGN A CUSTOM MEMBERSHIP TEMPLATE

Similar to Causes (Donation Pages) and Events, Process Donation will create a custom Membership page template that matches the look and feel of your website. This is a onetime task AND Process Donation will provide a URL to the Membership page created, this unique URL will be used by you to link it to your website. Once the custom Membership template is created, you can create as many Memberships as you would like. Here is an example of what a template would look like (based on how your website is formatted):



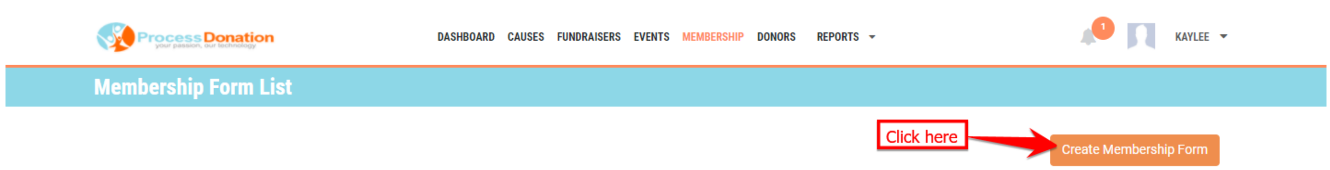
NEXT: CREATE A MEMBERSHIP FORM

PREVIOUS: INTRODUCTION TO MEMBERSHIPS

CREATE A MEMBERSHIP FORM

To create a Membership form, first make sure you have requested a Custom Membership Template / Page from Process Donation. You will have requested this during the sign-up process or by emailing Process Donation at support@processdonation.org. Whether you have a Custom Membership Template page created or you are waiting for Process Donation to send you a unique URL, you can begin creating your Membership form. Click on Membership on the menu bar. This will display a list of Memberships, whether they are Active or Deactivated.

Simply click on the Create Membership Form button. You will need to have the Membership details including the title, description, and Reminder days for recurring (Optional), contact information, Membership level pricing, and Member information to collect from Members etc. Creating a Membership is a simple 3-step process.

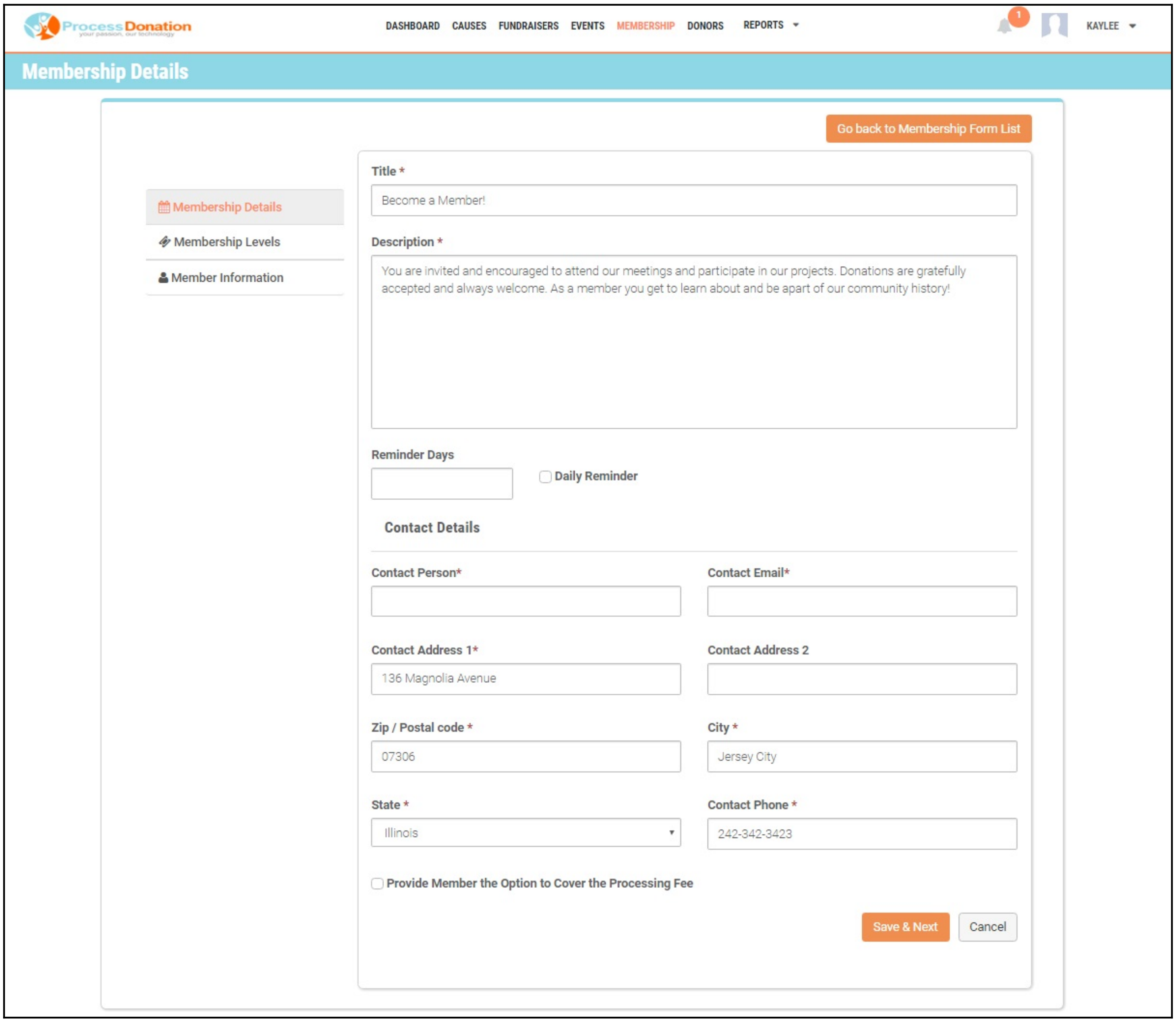


NEXT: SETUP MEMBERSHIP DETAILS

PREVIOUS: CREATE A MEMBERSHIP FORM

SET-UP MEMBERSHIP DETAILS

Whether you are building a new Membership or editing an existing, you will be taken to a screen like the one below.



1. **Title** - Give a title to the Membership Form
2. **Description** - You may enter a brief description about the Membership
3. **Reminder Days** - Process Donation will provide an option for Recurring Reminder emails for Members. If you set the Reminder day based on selection, Members will

receive the reminder emails from you.

4. **Daily Reminder** - This box will allow to set up a daily reminder to you

Contact Details: In this section we will capture details pertaining to contact person within your organization

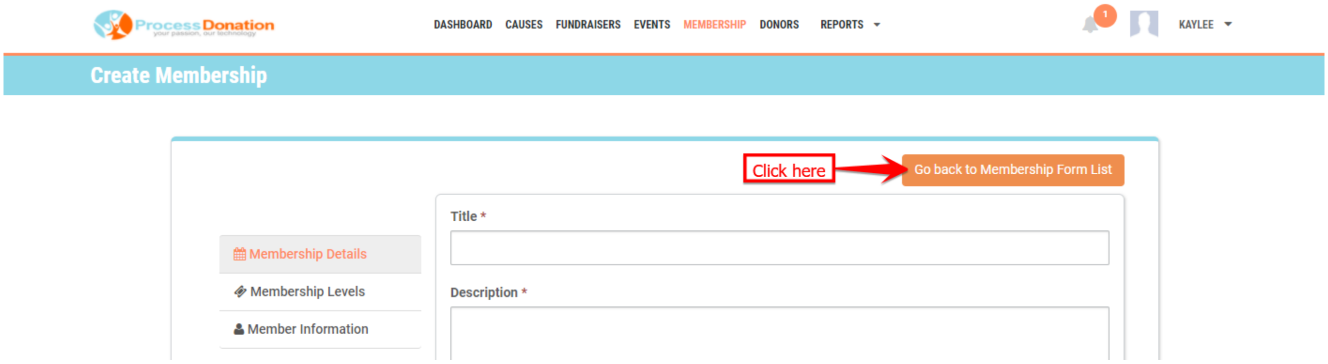
1. **Contact Person** - Enter the name of the contact person
2. **Contact Email** - Enter the email ID
3. **Contact Address 1** - Enter the address
4. **Contact Address 2** - Enter the address
5. **Zip / Postal code** - Enter zip code
6. **City** - Enter city
7. **State** - Enter state
8. **Contact Phone** - Enter phone number
9. **Provide Member the Option to Cover the Processing Fee** - Provides you with the option of asking the Member to cover the processing fee; once checked here, the default on the Membership page will be to have the box checked. Member may uncheck the box to not cover the processing cost.

Save & Next click on this button to proceed creating membership form

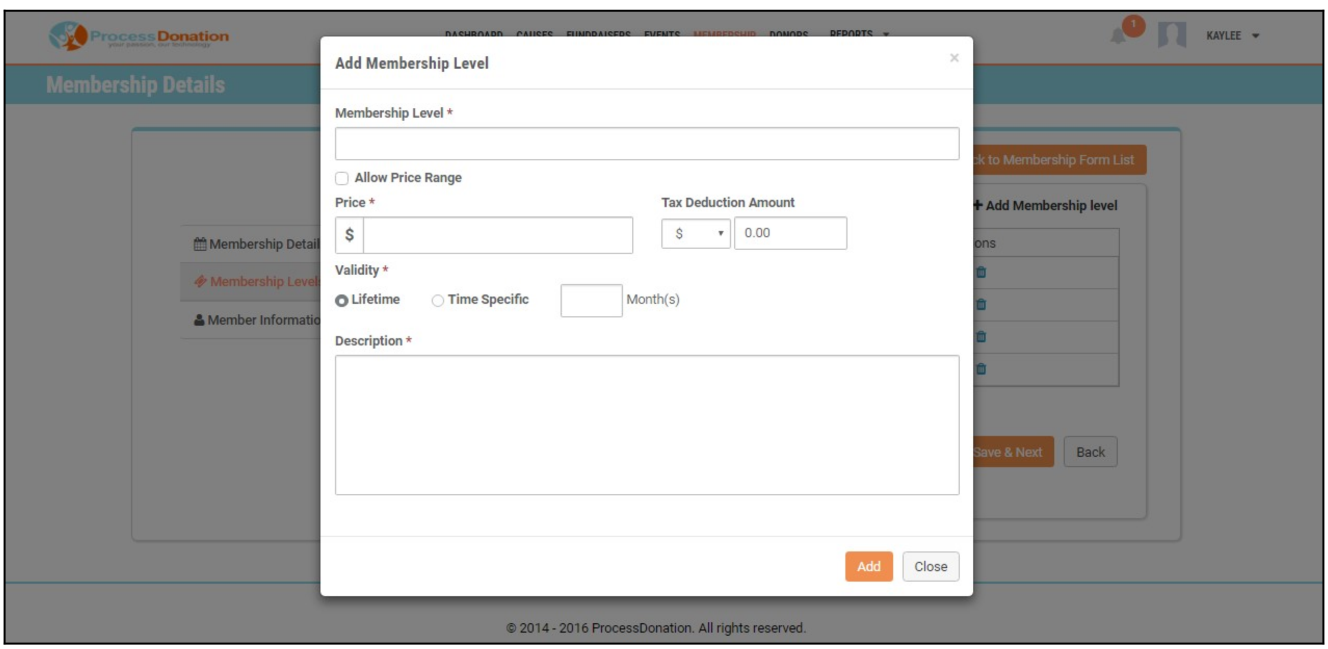
NEXT: ADD MEMBERSHIP LEVELS **PREVIOUS: CREATE A MEMBERSHIP FORM**

ADD MEMBERSHIP LEVELS

You can always go back to membership details to edit the filled details, including adding levels.



Include donation option along with Memberships - Also, if you wish to include an option for accepting donations, you can do so by simply enabling the check box (pictured above)



Membership Level - Enter a name for the Membership Level

Allow Price Range - If you set the Allow Price Range check box to checked, then you need to provide the Price From and Price To fields that will appear (not pictured). Based on the price ranges, you can collect the amount in between the amount ranges.

Price From - Enter value to set minimum price

Price To - Enter value to set maximum price

Tax Deducted Amount - Enter either a percentage of the amount or an actual dollar value to allow for tax-deductible amount for the Membership; our IRS Tax Letter will use this amount when calculating the year-end notification (if applicable).

Validity - If you select the Lifetime option, then the Membership Level will be bestowed on the Member with no end date; there will be no additional fees due from the Member after the initial collection. The Time Specific option sets up a recurring member dues situation, so every month for a period of time you set (x months) you can send reminder emails to your Members and if on the Membership sign-up page they checked "Renew my membership automatically" the system will collect the dues from them monthly.

Description - Enter a brief description about the Membership Level

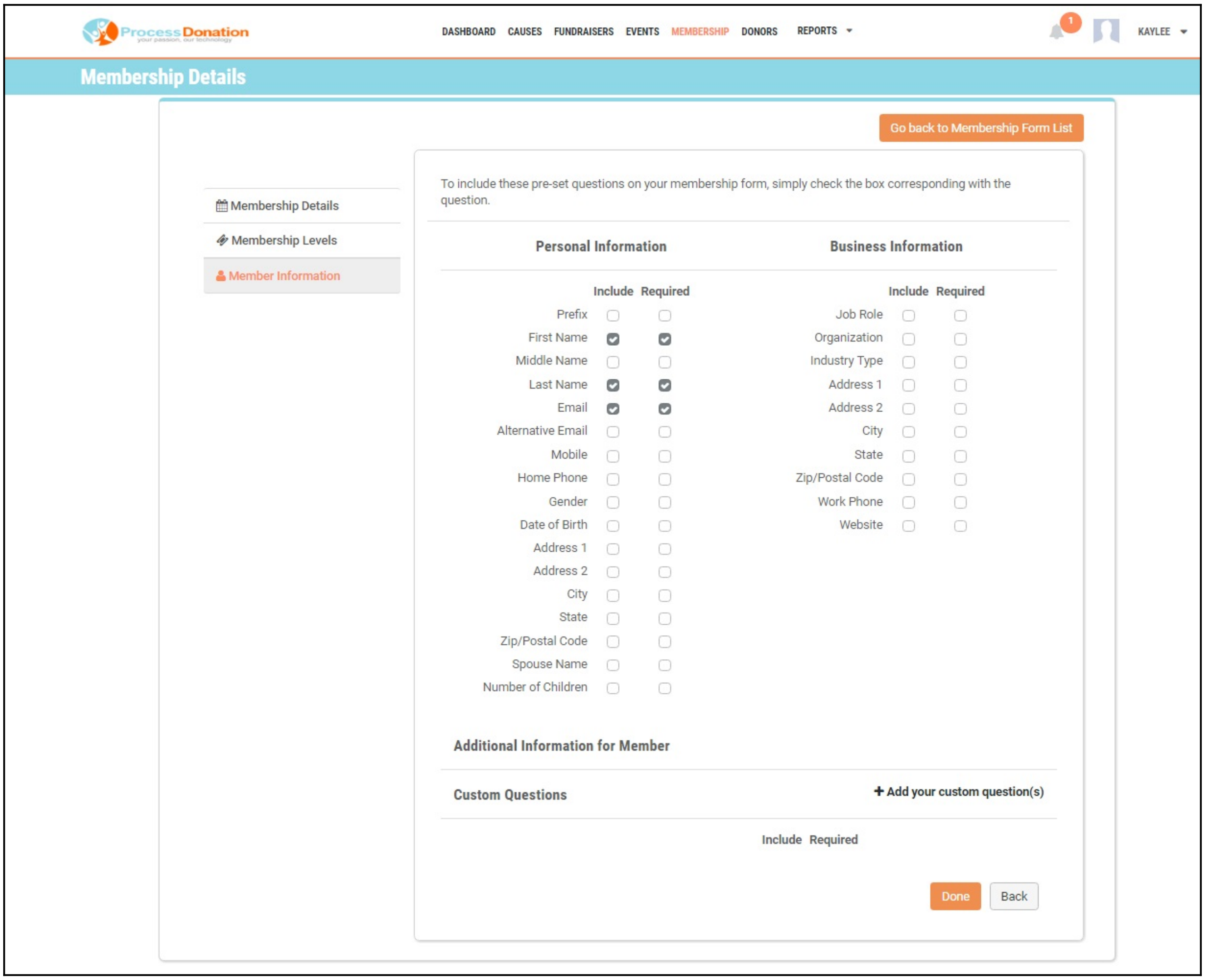
Add / Close - Add makes it an active level. Close rejects any changes made.

Save & Next - Click on this button to proceed creating a Membership Form.

NEXT: REQUEST MEMBER INFORMATION **PREVIOUS: SETUP MEMBERSHIP DETAILS**

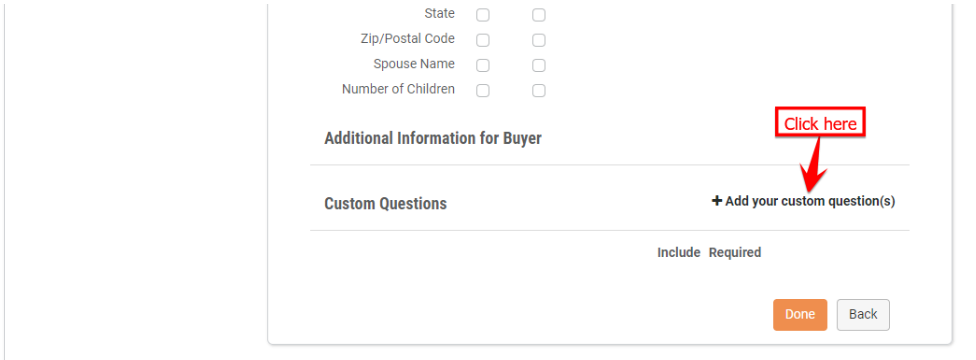
REQUEST MEMBER INFORMATION

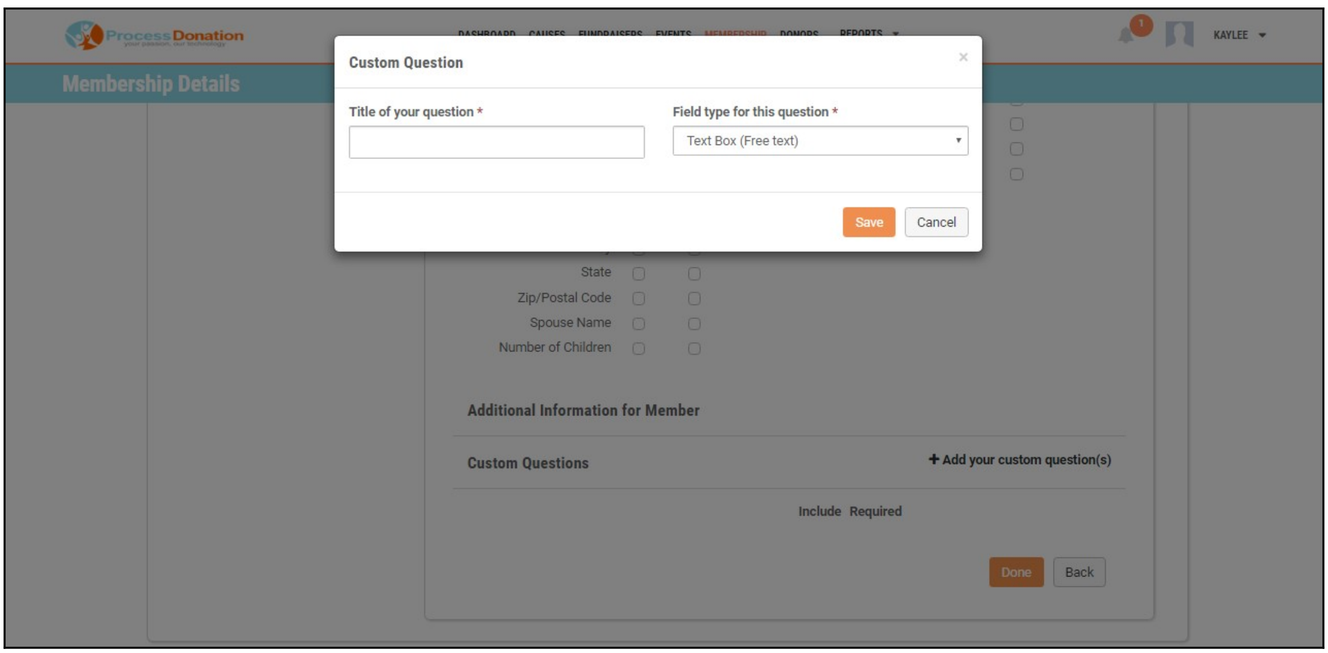
In this step, you get to choose what information to collect from the Member during from the Membership Form.



You can choose to collect the listed fields from the Member. Check Include next to the field to make it optional for the Member to fill and check Required if you want to make it a mandatory field. You can exclude a field by unchecking both the check boxes next to the field.

You can always add a custom question to collect information from the Member if you do not find the fields you need. To add a custom question, click on Add your custom question as shown below; please review Events - Buyer / Attendee Info & Custom Questions for instructions on the custom questions feature.





Click on **Done** when the changes are to be saved.

NEXT: LINK MEMBERSHIP FORM TO YOUR WEBSITE **PREVIOUS: ADD MEMBERSHIP LEVELS**

LINK MEMBERSHIP FORM TO YOUR WEBSITE

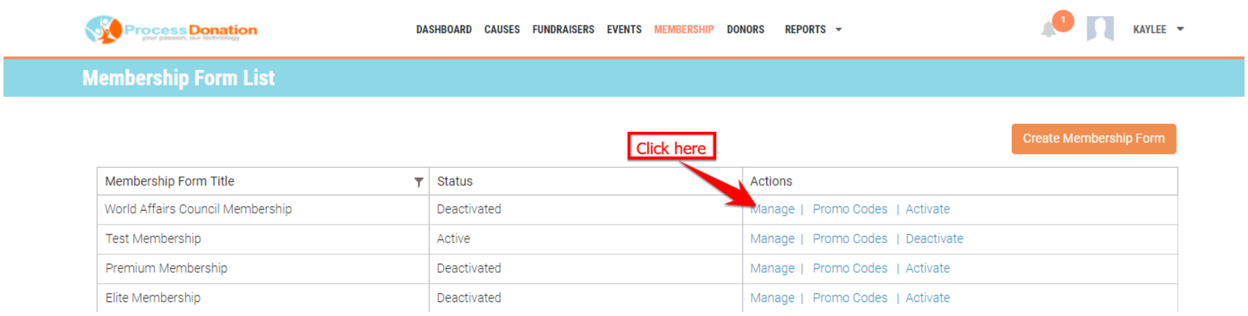
When you create a membership, it generates a URL for the membership page automatically.

This URL should then be connected to the appropriate tab or button on your website.

NEXT: MANAGE A MEMBERSHIP FORM **PREVIOUS LINK MEMBERSHIP FORM TO YOUR WEBSITE**

MANAGE A MEMBERSHIP FORM

You can always update the Membership information like name, description and Contact Information. You can also add/remove Membership levels or Membership levels pricing. You can also deactivate the Membership, but you cannot delete the membership level once a Member purchases a Membership level, and this is due to the Reporting.

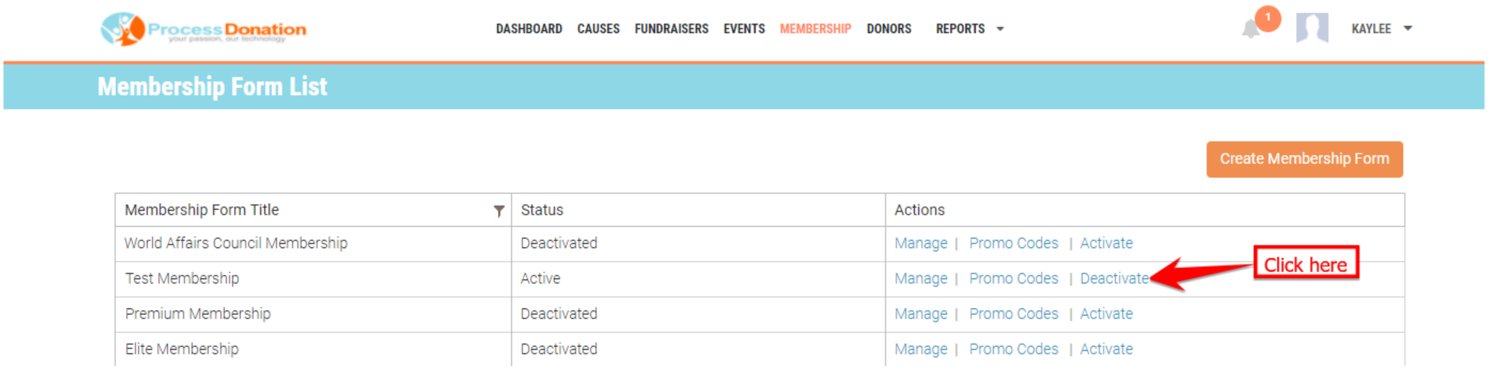


To manage an existing membership click on **Manage** link corresponding to the membership form title and you will be redirected to the page where you could edit the information, where the flow will be similar to creating a new Membership Form.

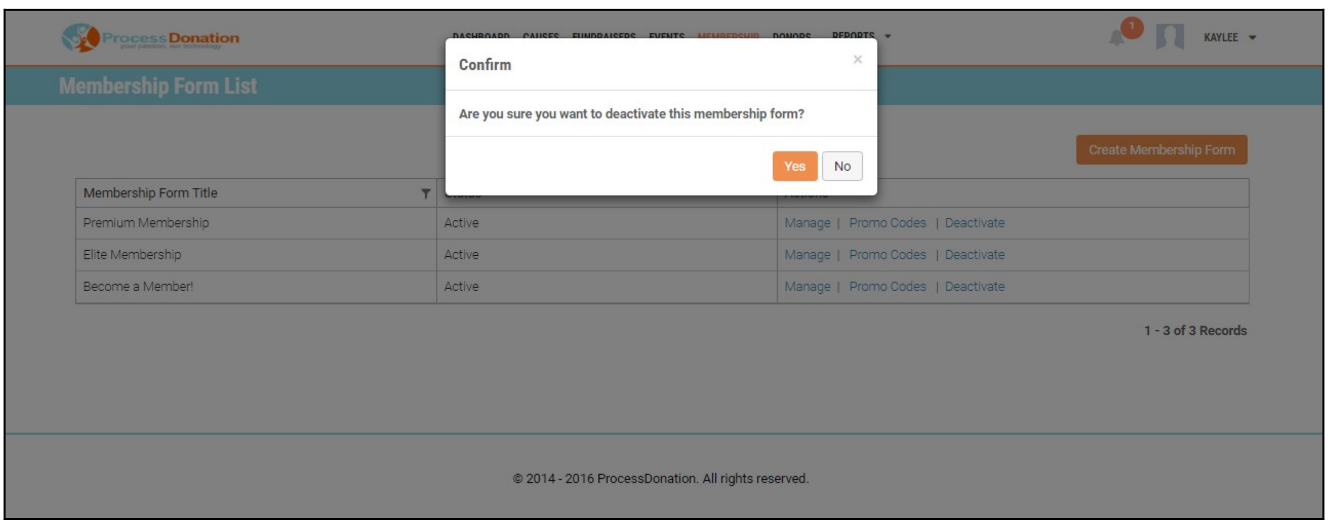
NEXT: DEACTIVATE A MEMBERSHIP FORM **PREVIOUS: LINK MEMBERSHIP FORM TO YOUR WEBSITE**

DEACTIVATE A MEMBERSHIP FORM

To deactivate an existing Membership, simply click on the **Deactivate** link corresponding to the Membership and confirm the action by clicking on Yes. There is no option to delete a Membership because if a Membership was deleted it would ruin the Reporting, so instead you will need to Deactivate the Membership.



Confirm your action by clicking on Yes:



Deactivated Memberships will continue to appear in the Memberships page with Activate link in place of Deactivate. So you can toggle the status between active and inactive by clicking on the link with the opposite word. So an Active Membership can be Deactivated and an Inactive Membership can be Activated. Deactivated Membership

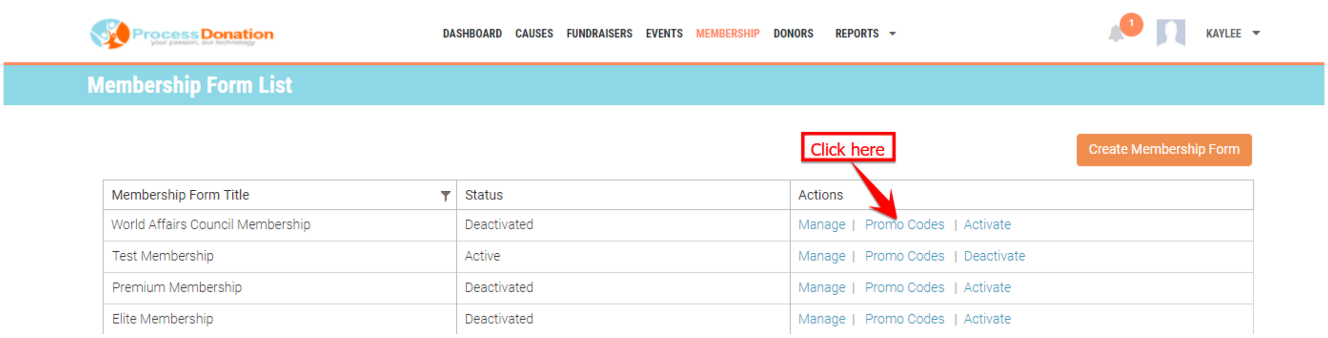
Forms will continue to appear in the Membership page.

NEXT: CREATE/MANAGE PROMO CODES **PREVIOUS: MANAGE A MEMBERSHIP FORM**

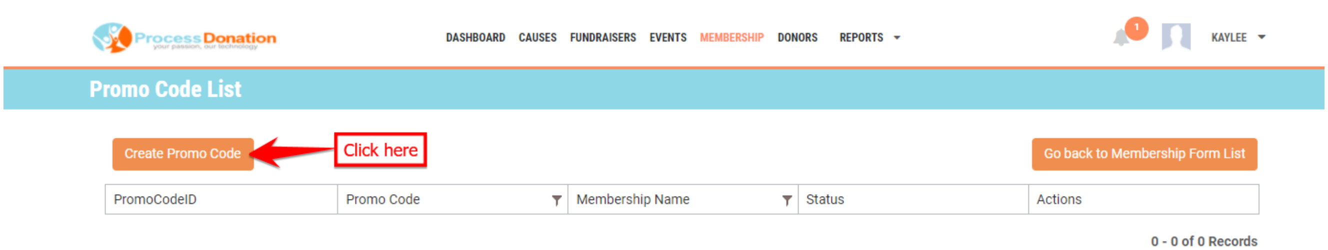
CREATE / MANAGE PROMO CODES FOR MEMBERSHIPS

Promo Codes (Aka Discount Codes) can help you attract Members in large numbers in order to make your Membership program successful. Promo Codes (such as discount for prior donors), incentives for participants on sign up, track which social media channel is the most productive in bringing people to become Members, below are the steps that will help you add this feature.

To create Promo Codes for the Membership, click on **Promo Codes** link corresponding to the Membership from the Membership page.

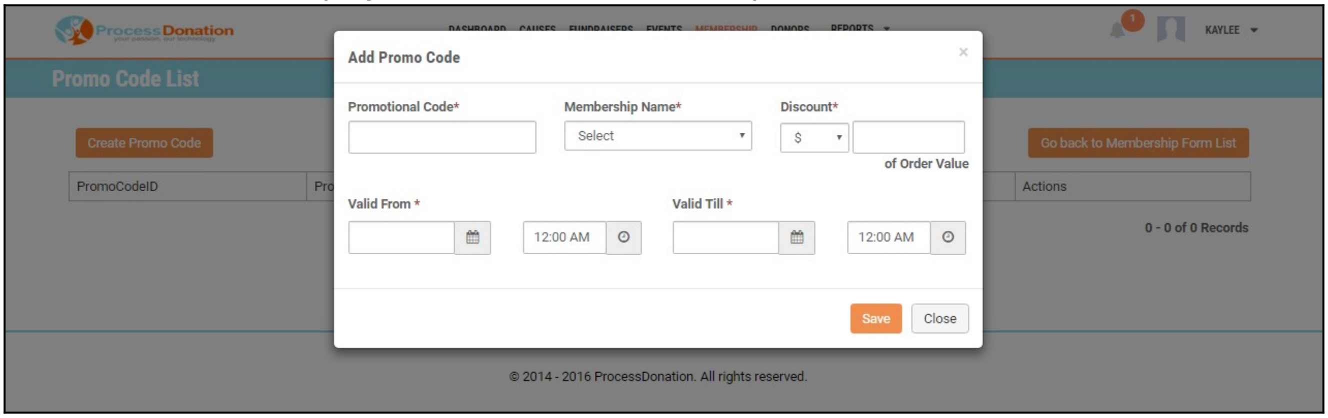


On the next page i.e., **Promo Code List** page click on **Create Promo Code** button



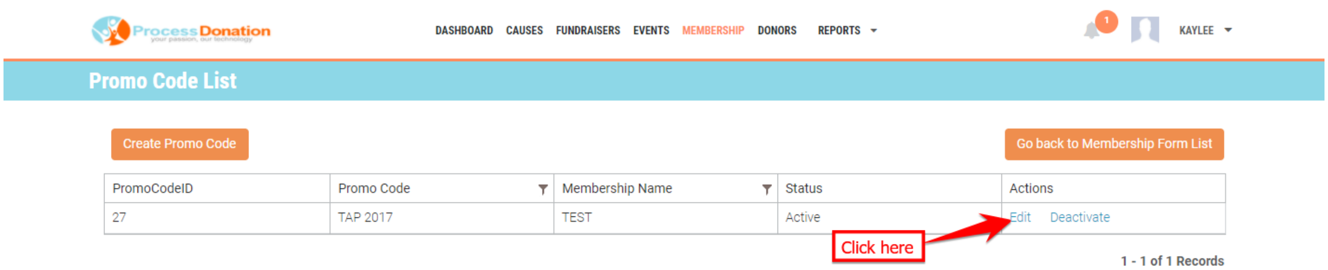
- **Promotional Code** – Enter name/code you want to assign to a promotional code
- **Membership Name** – Choose the Membership name you want the promo code to be applicable
- **Discount** – Define the discount you want to allow for users, using this promotional code
- **Valid From** – Select the start date and time for the promotional code

- **Valid Till** – Select the expiry date and time for the promotional code

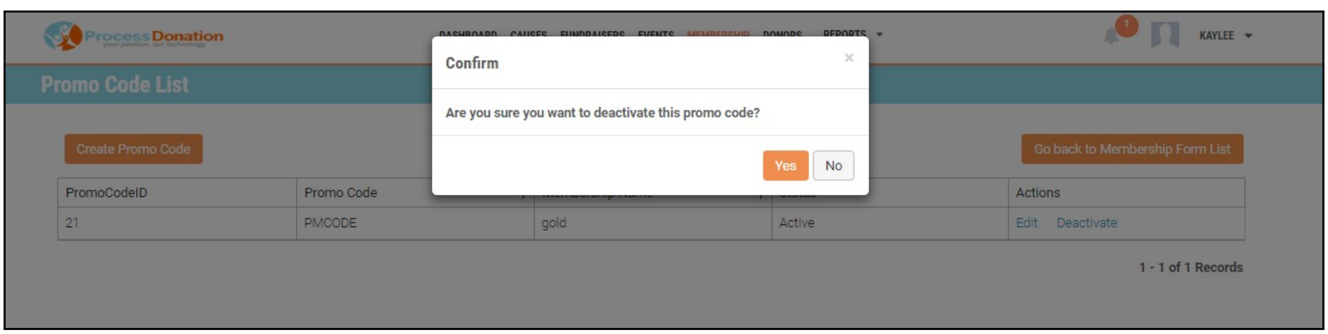


Upon clicking on **Save** button the Promo Code will be saved.

With the option to Edit you may choose to edit a Promo Code



You may choose to deactivate an existing Promo Code by simply clicking on the Deactivate link corresponding to the Promo Code ID and confirm your action.

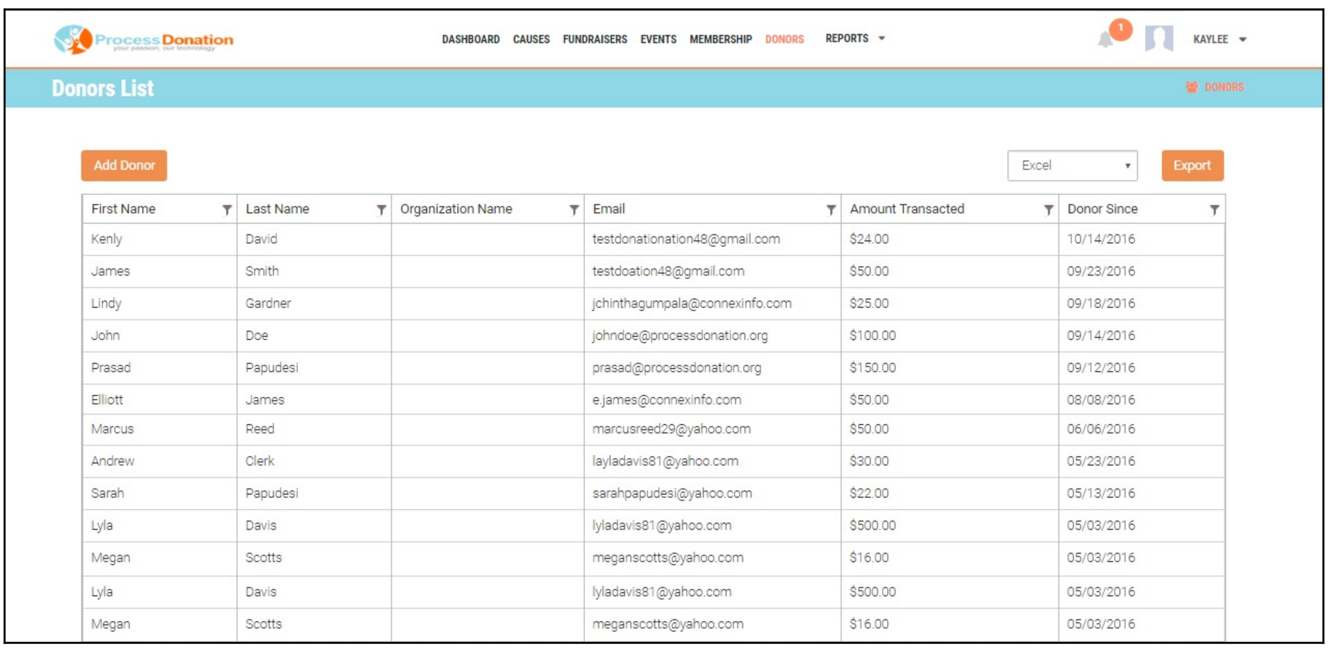


[PREVIOUS: DEACTIVATE A MEMBERSHIP FORM]

DONOR

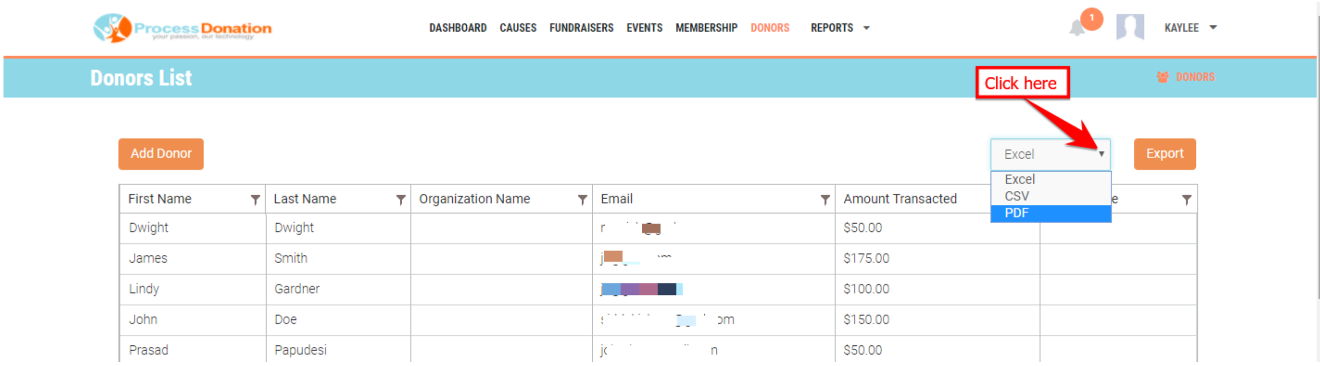
(Ultimate)

Donors functionality is designed to give you the ability to view information related to donors that is entered while making a Donation on your Custom Donation Page or one of your Fundraisers' pages, buying Tickets in Events, and while signing up for a Membership. Transaction specific to those activities can be found under those menu items to provide you with a quick look, but under Donors is where you go to see a complete listing of all the contact information and activities that have been logged. This view provides you with a basic listing that you can Export or search to pull up the Donor's complete information history onto a single page (see Manage Donor).



First Name	Last Name	Organization Name	Email	Amount Transacted	Donor Since
Kenly	David		testdonationation48@gmail.com	$24.00	10/14/2016
James	Smith		testdoation48@gmail.com	$50.00	09/23/2016
Lindy	Gardner		jchinthagumpala@connexinfo.com	$25.00	09/18/2016
John	Doe		johndoe@processdonation.org	$100.00	09/14/2016
Prasad	Papudesi		prasad@processdonation.org	$150.00	09/12/2016
Elliott	James		e.james@connexinfo.com	$50.00	08/08/2016
Marcus	Reed		marcusreed29@yahoo.com	$50.00	06/06/2016
Andrew	Clerk		layladavis81@yahoo.com	$30.00	05/23/2016
Sarah	Papudesi		sarahpapudesi@yahoo.com	$22.00	05/13/2016
Lyla	Davis		lyladavis81@yahoo.com	$500.00	05/03/2016
Megan	Scotts		meganscotts@yahoo.com	$16.00	05/03/2016
Lyla	Davis		lyladavis81@yahoo.com	$500.00	05/03/2016
Megan	Scotts		meganscotts@yahoo.com	$16.00	05/03/2016

To Export your information from the Process Donation platform simply follow the instructions from the picture below.

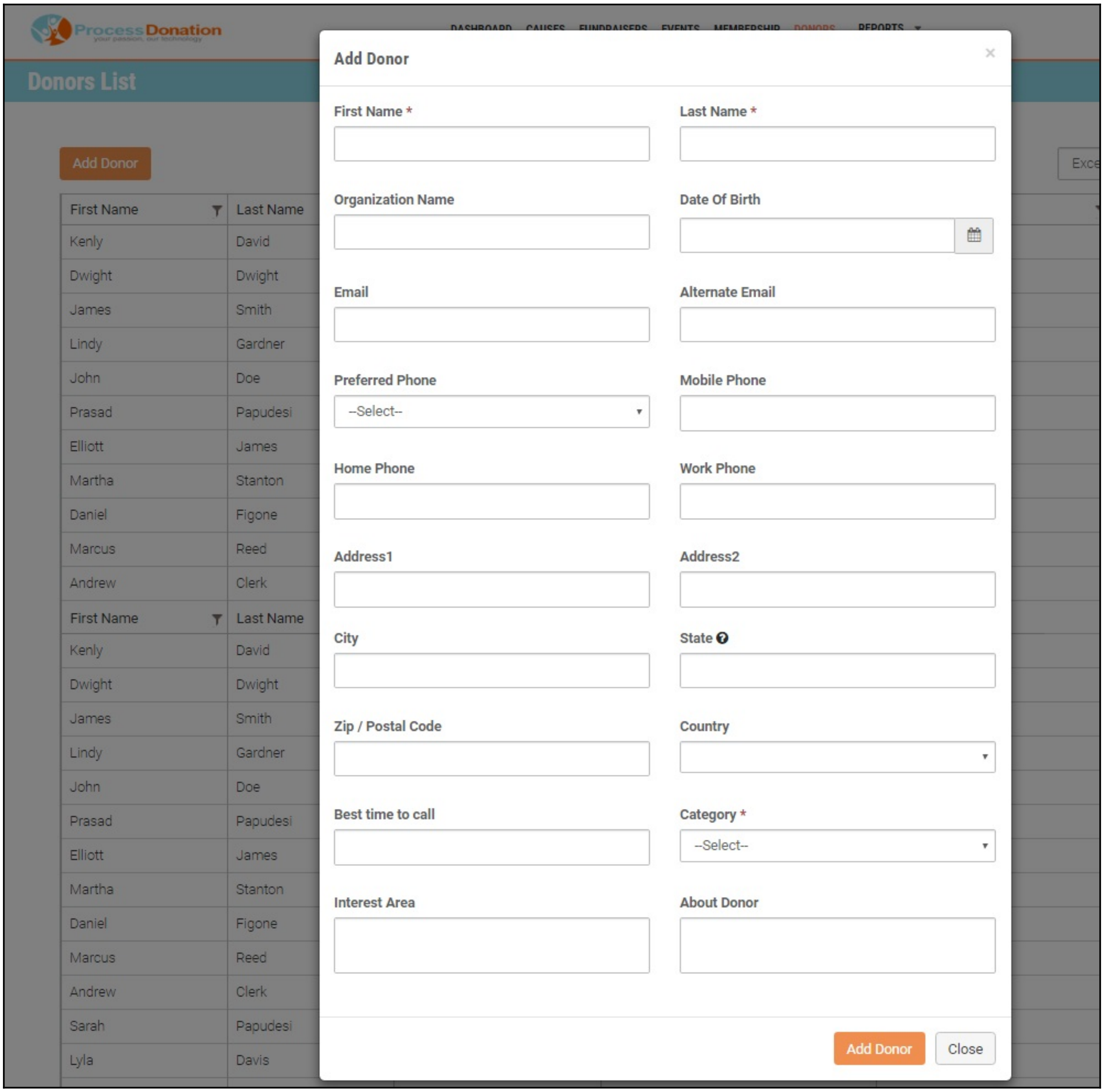


[NEXT: ADD DONOR]

ADD DONOR

You can populate your Donor list a few of different ways: automatically upon an action being performed by the Donor, contact Process Donation to upload a large list, or manually enter the Donor (see picture below).

1. **Automatically:** When a Donor performs a transaction via the secure Donation / Fundraiser / Event / Membership pages built by Process Donation, then basic information of the donor will be added into the system and you can further enhance.
2. **Donor List Upload**: Contact us at support@processdonation.org and provide us with an Excel or CSV file in an agreed upon format and we will upload your information.
3. **Manually:** Through the portal, you can add (or modify) Donors, see picture below:



First Name - Donor's first name

Last Name - Donor's last name

Organization Name - Enter if the Donor belongs to an organization

Date Of Birth - Donor's Date of Birth

Email - Donor's email address

Alternate Email - Donor's alternate email address

Preferred Phone - Donor's preferred phone is to select the correct one (either Mobile, Home, or Work) from the drop down field

Mobile Phone - Donor's mobile phone number

Home Phone - Donor's home phone number

Work Phone - Donor's work phone number

Address1 - Donor's address

Address2 - Donor's address

City - Donor's city

State - Donor's state

Zip / Postal Code - Donor's postal code

Country - Donor's country

Best time to call - Best time to call the Donor

Category - Choose the correct option from the drop down

Interested Area - This is a field for you to tailor to your organization, collect any information that might be helpful to categorize and sort later

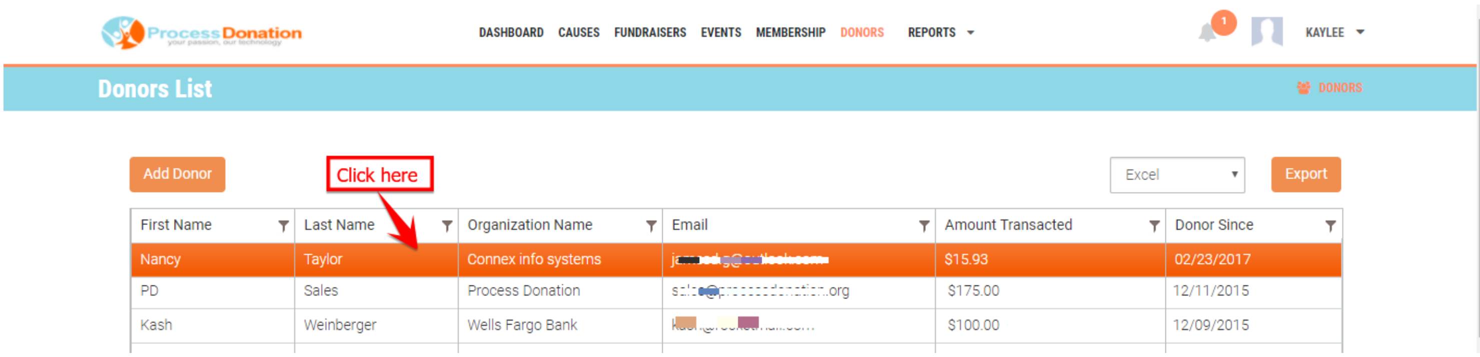
About Donor - Another text area that can be used to write a short note about the Donor

NEXT: MANAGE DONOR

PREVIOUS: DONOR

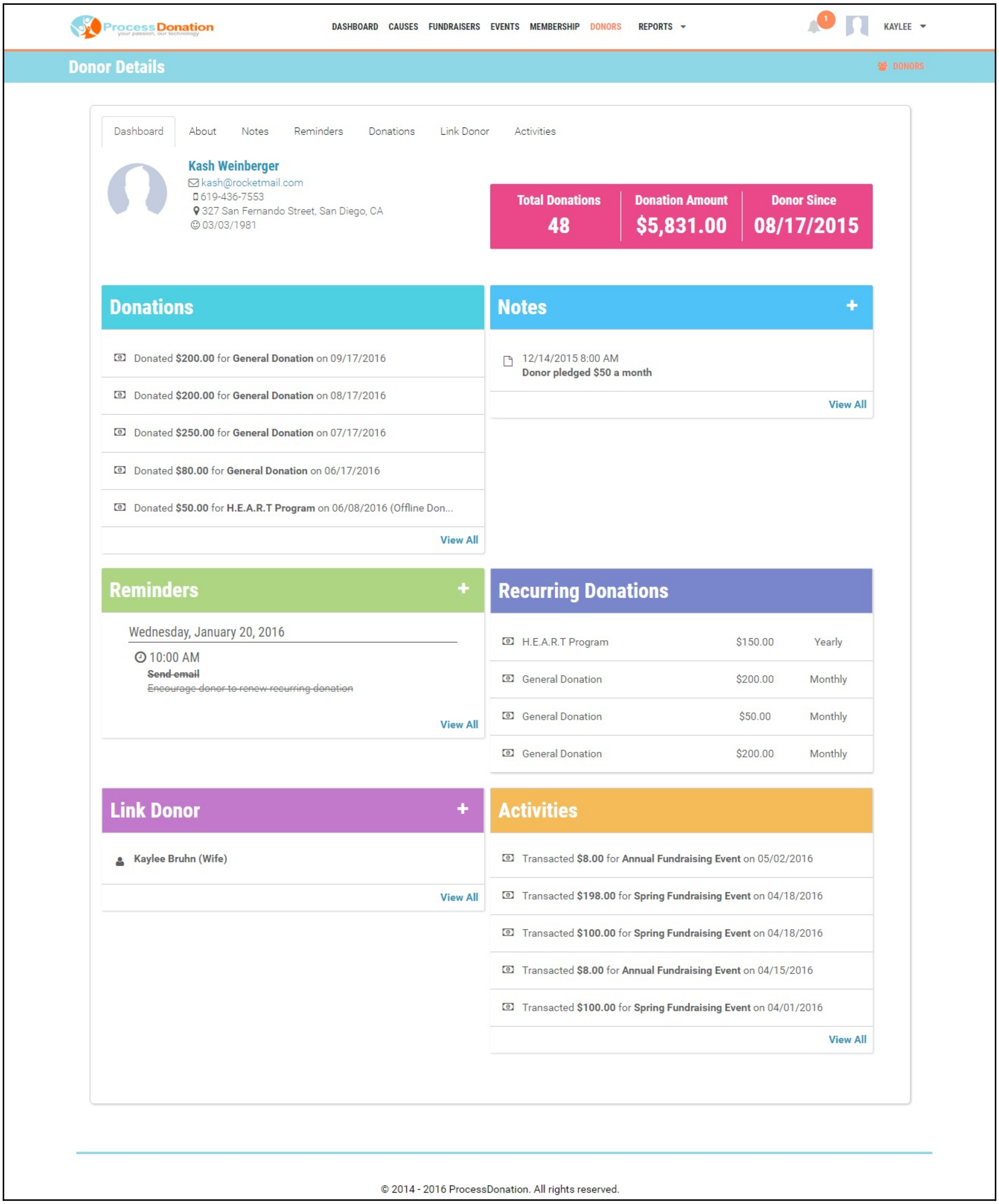
MANAGE DONOR

You can update Donor information after a Donor has been added into the system. To edit a particular Donor, click on the Donor record from the list. You will be routed to Donors Dashboard.



Donors Dashboard

Donors Dashboard will enable you to view the list of Donations, Notes, Reminders, Recurring Donations, Link Donor and Activities that are related to the Donor.


DASHBOARD CAUSES FUNDRAISERS EVENTS MEMBERSHIP DONORS REPORTS
KAYLEE
Donor Details
DONORS
Dashboard About Notes Reminders Donations Link Donor Activities
Kash Weinberger
kash@rocketmail.com
619-436-7553
327 San Fernando Street, San Diego, CA
03/03/1981
Total Donations 48
Donation Amount $5,831.00
Donor Since 08/17/2015
Donations
Donated $200.00 for General Donation on 09/17/2016
Donated $200.00 for General Donation on 08/17/2016
Donated $250.00 for General Donation on 07/17/2016
Donated $80.00 for General Donation on 06/17/2016
Donated $50.00 for H.E.A.R.T Program on 06/08/2016 (Offline Don...
View All
Notes
12/14/2015 8:00 AM
Donor pledged $50 a month
View All
Reminders
Wednesday, January 20, 2016
10:00 AM
Send email
Encourage donor to renew recurring donation
View All
Recurring Donations
H.E.A.R.T Program $150.00 Yearly
General Donation $200.00 Monthly
General Donation $50.00 Monthly
General Donation $200.00 Monthly
Link Donor
Kaylee Bruhn (Wife)
View All
Activities
Transacted $8.00 for Annual Fundraising Event on 05/02/2016
Transacted $198.00 for Spring Fundraising Event on 04/18/2016
Transacted $100.00 for Spring Fundraising Event on 04/18/2016
Transacted $8.00 for Annual Fundraising Event on 04/15/2016
Transacted $100.00 for Spring Fundraising Event on 04/01/2016
View All
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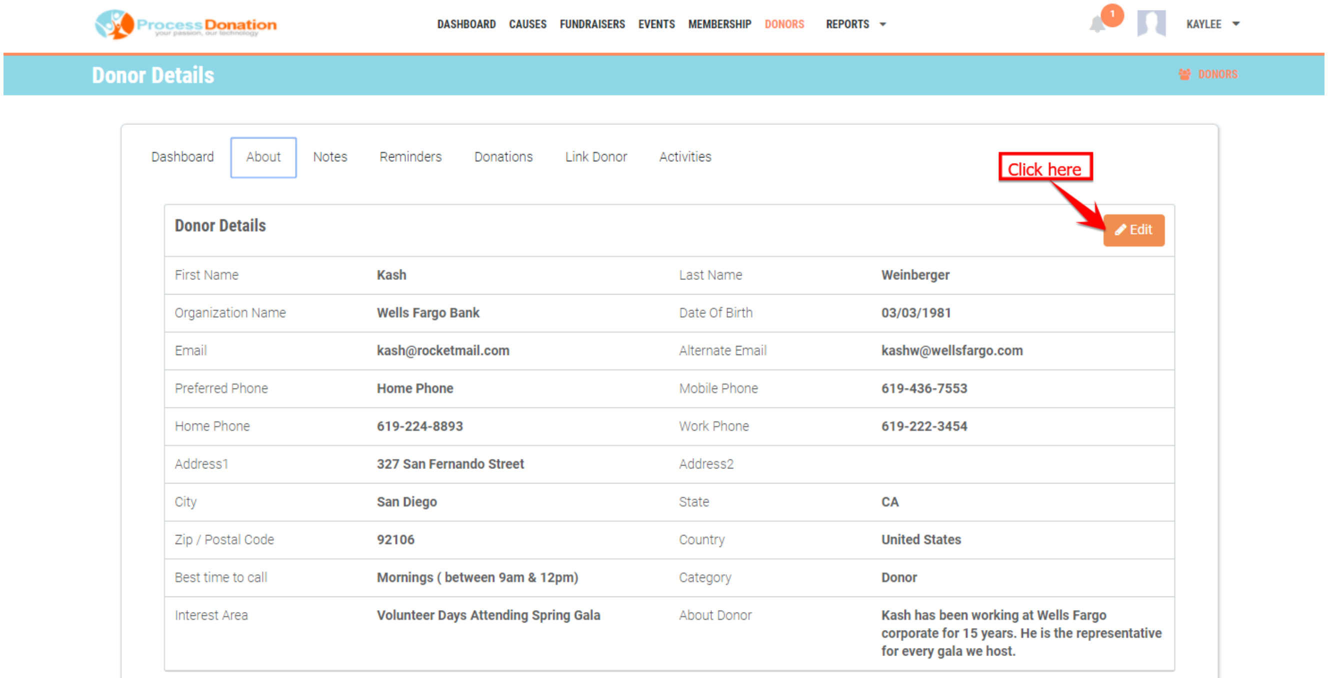
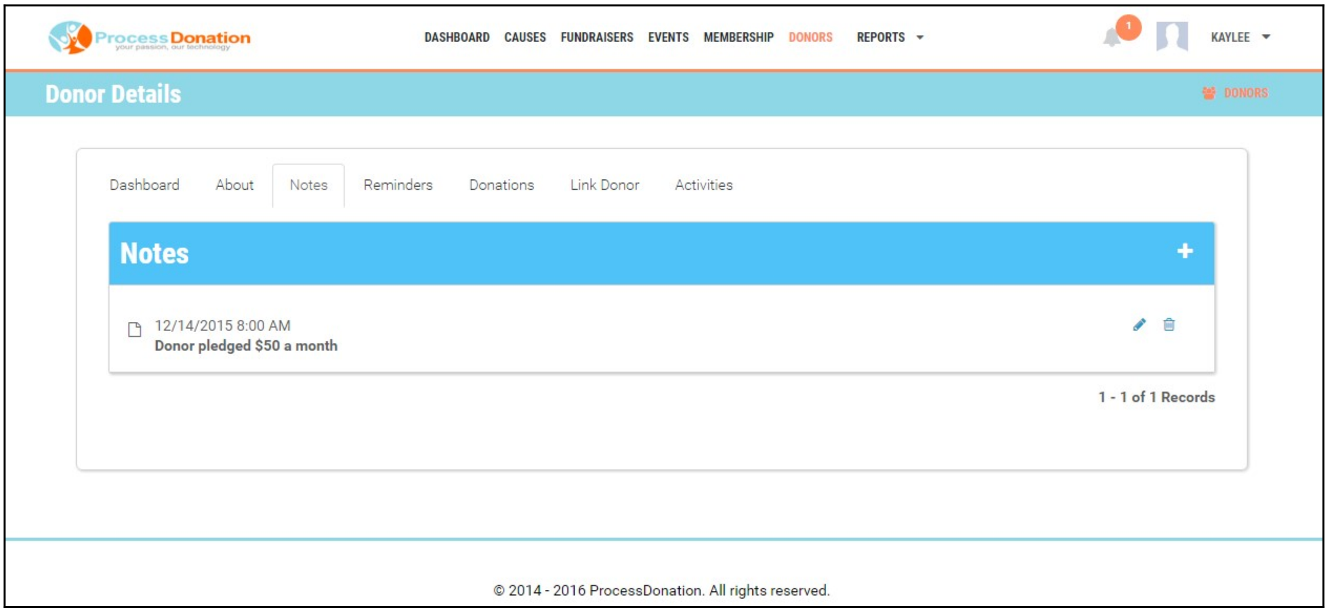
About

This is the section where you can view the Donor's demographic and contact information and also provided an option to be able to update the Donor information by simply clicking on edit button.

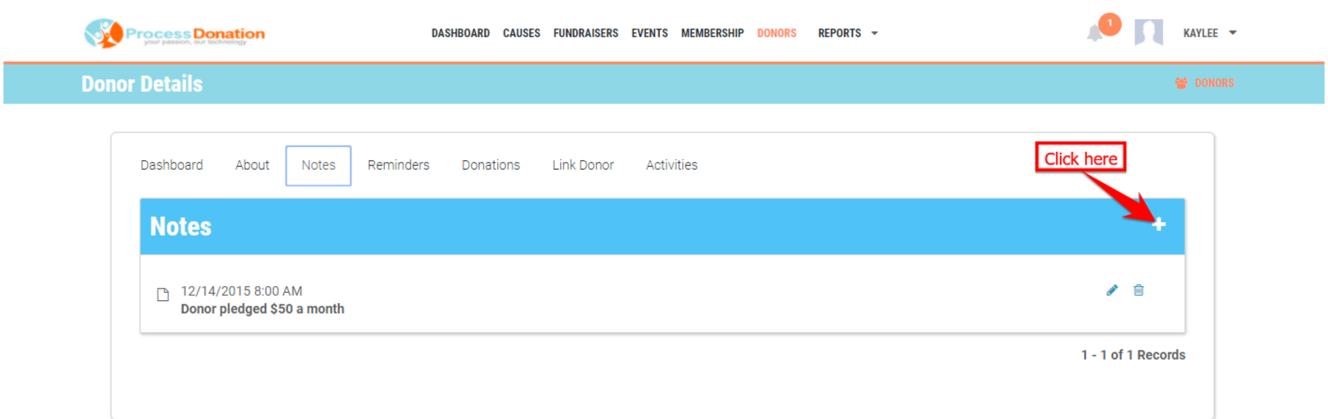


Notes

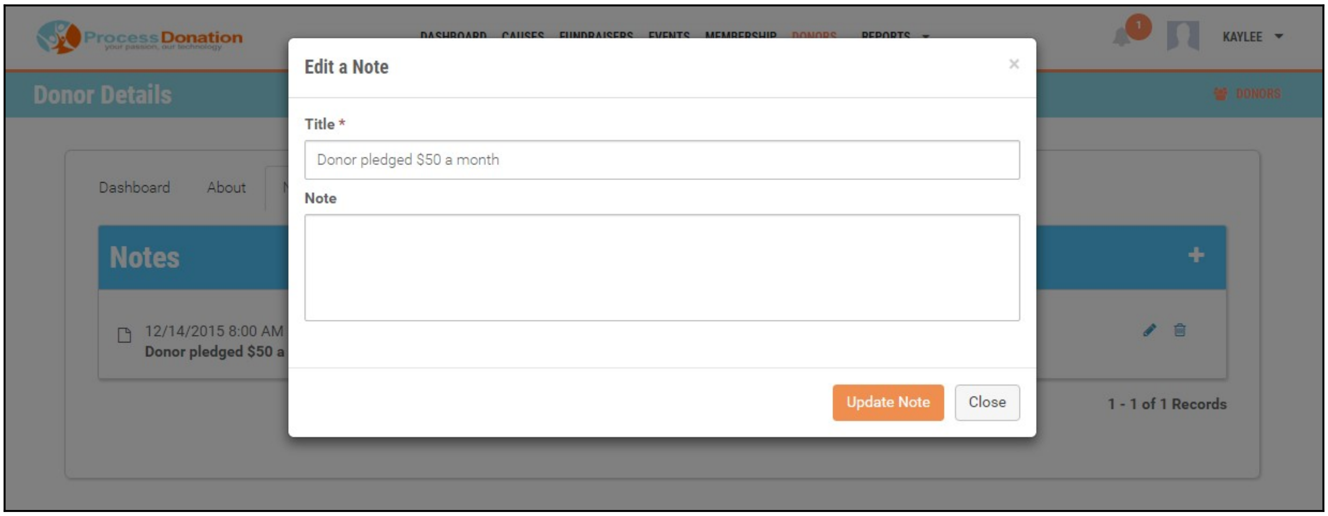
Here is where you would put in some notes about the Donor, maybe to document a conversation. Provide a title to the note to be able to understand the content of the note at a glance.



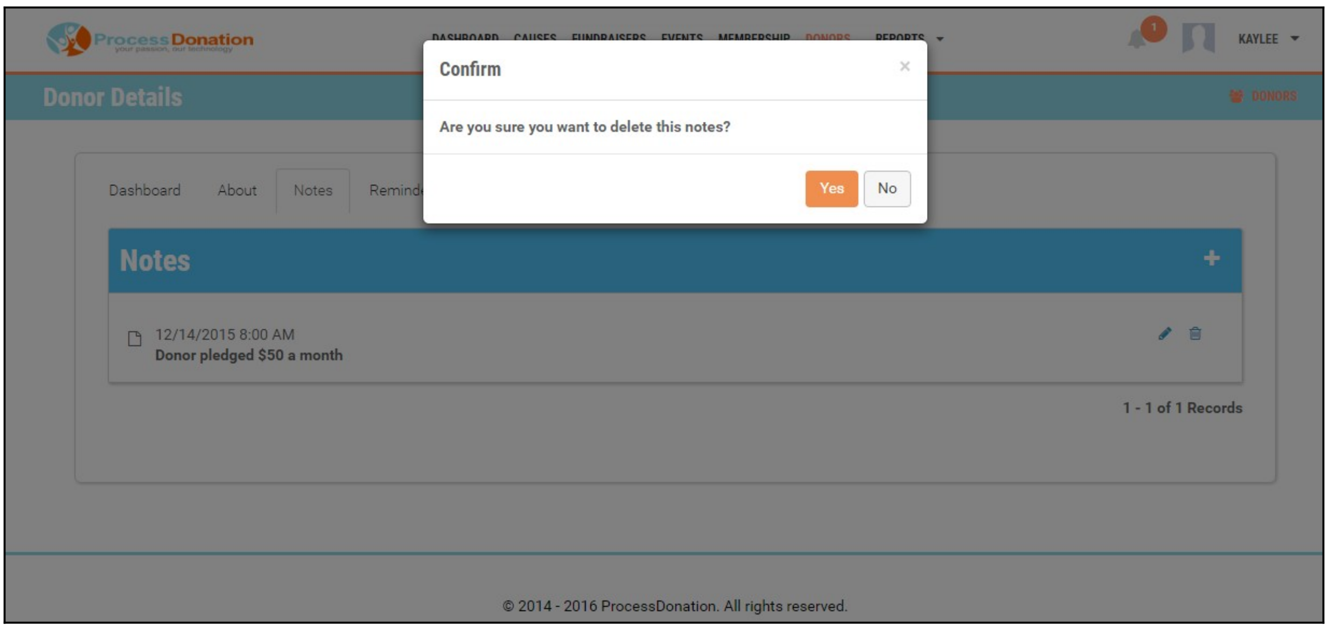
To add a new Note simply click on the plus symbol corresponding to the Notes in the window.



To edit an existing note you could click on the edit symbol corresponding to the note you want to edit, that would launch the note window with information already present.

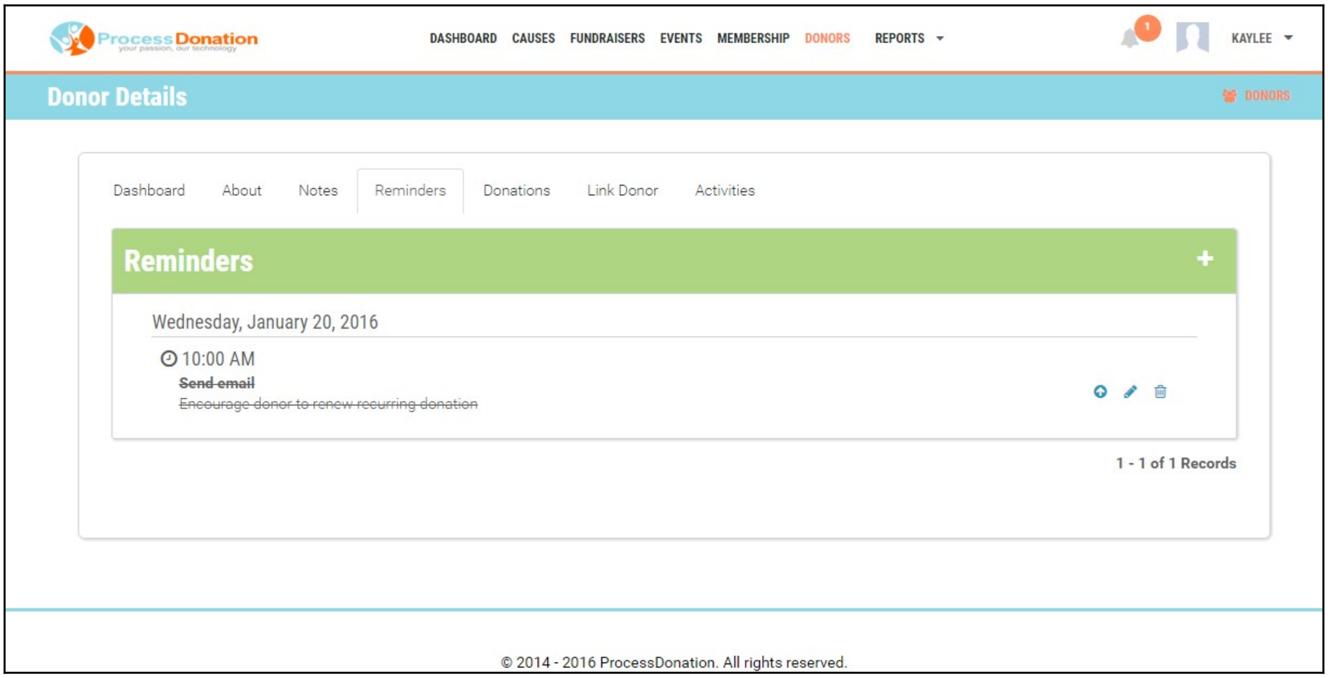


And to delete a Note you could click on the delete icon that is corresponding to the Note you wish to delete and confirm by appropriate action.

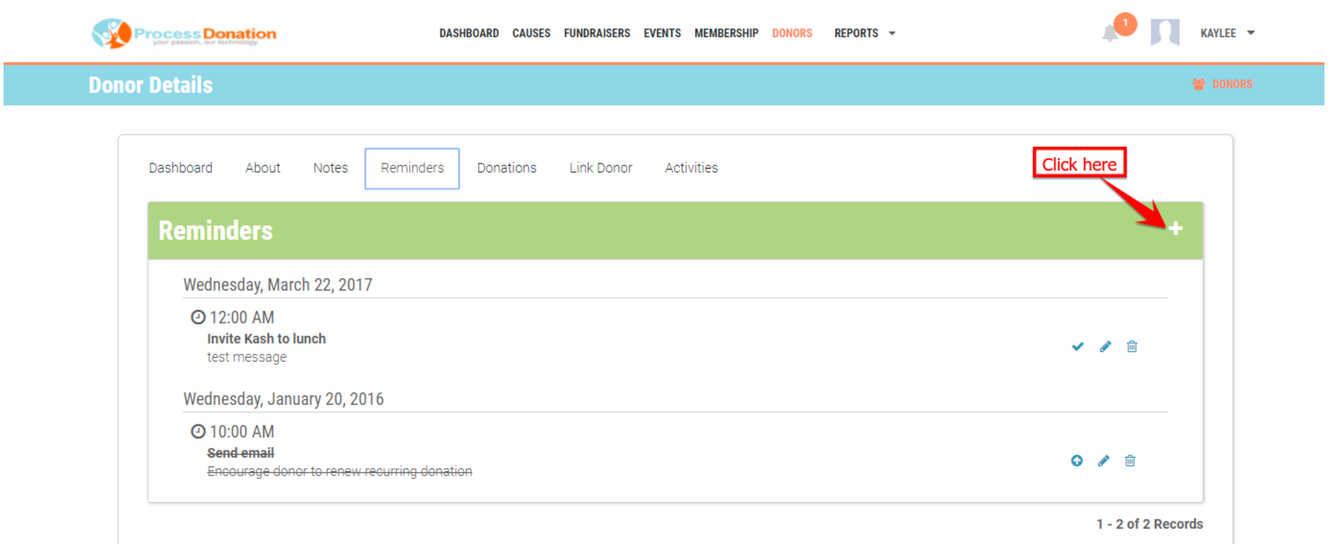


Reminders

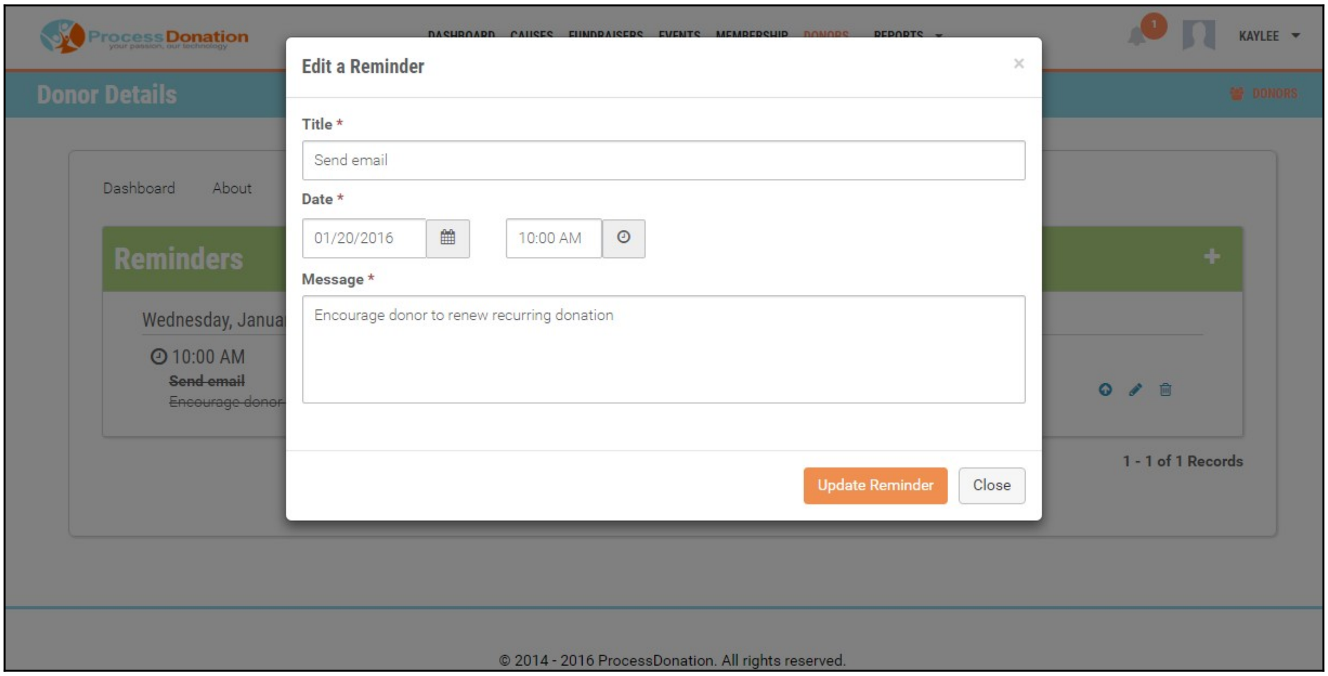
You can set important Reminders for you related to specific Donors; when the Reminder is due you will be notified by the bell icon in the upper right hand corner of the screen (see below, in the picture there is "1" notification).



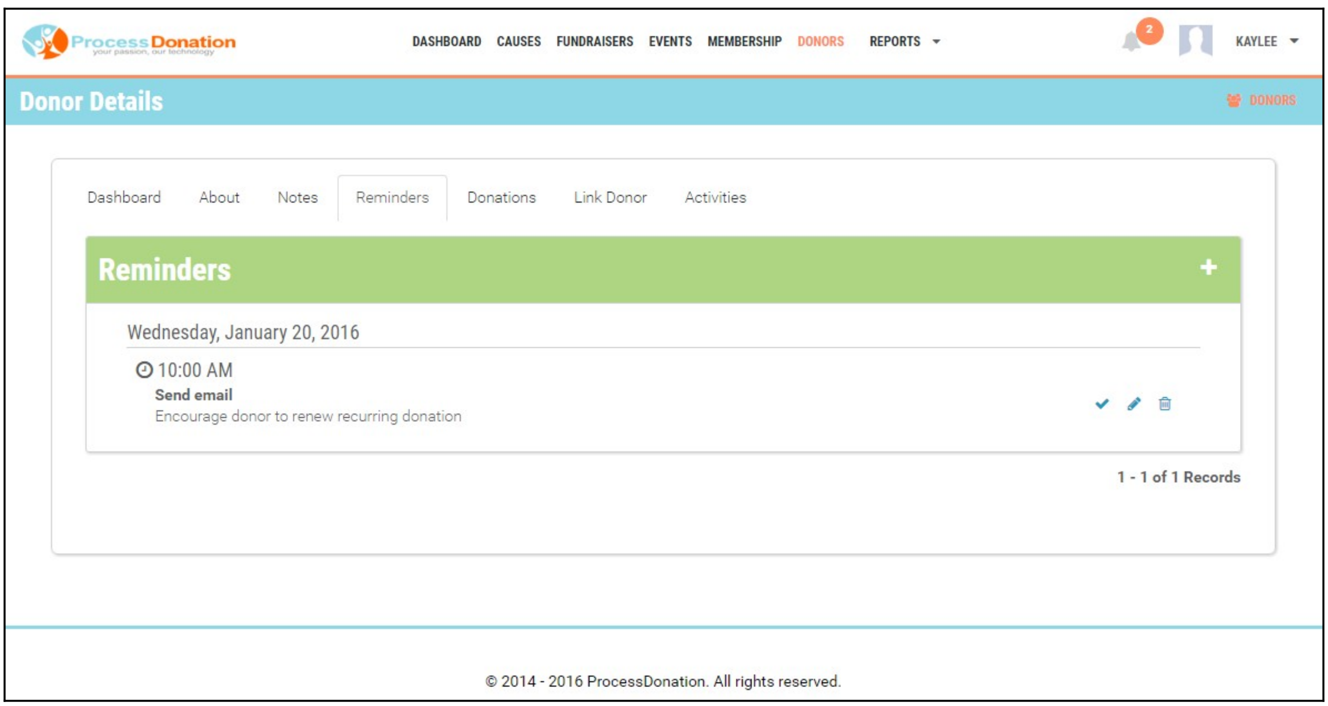
To add a new Reminders simply click on the plus symbol corresponding to the Reminders in the window.

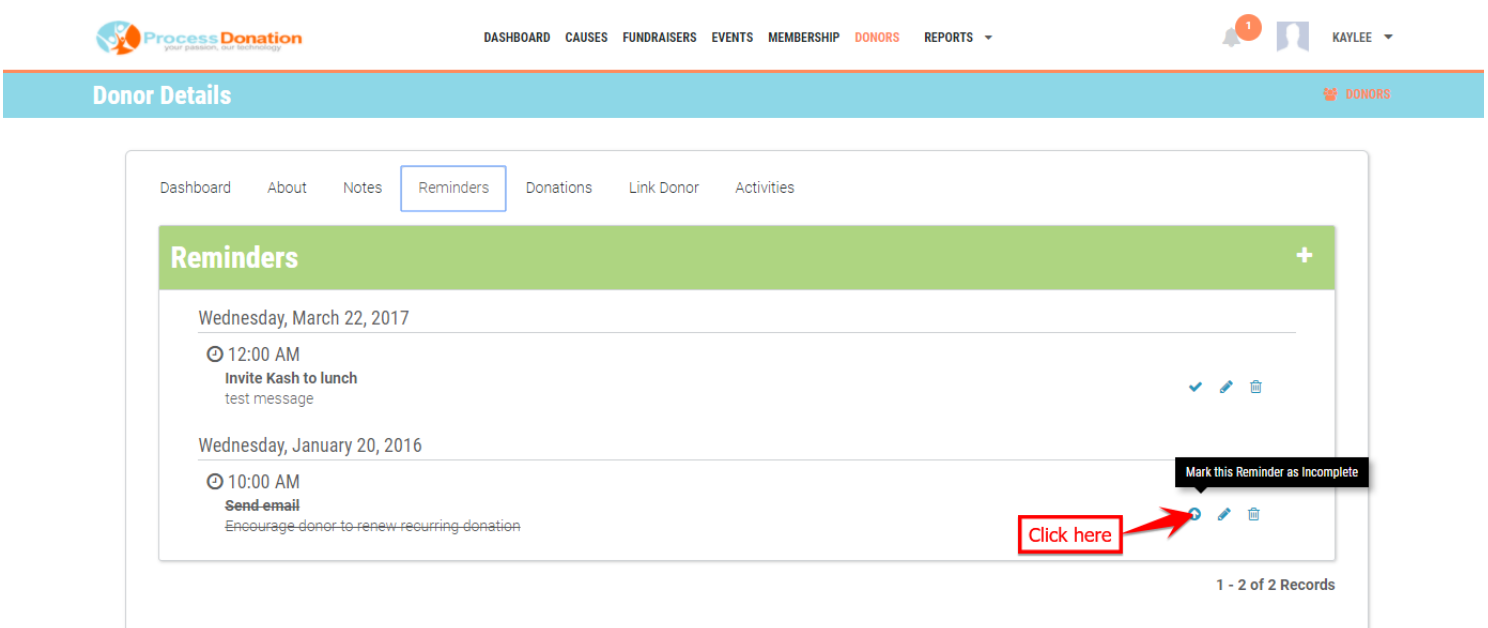


To edit an existing Reminder you could click on the edit symbol corresponding to the Reminder you want to edit, which would launch the Reminders window with information already present.

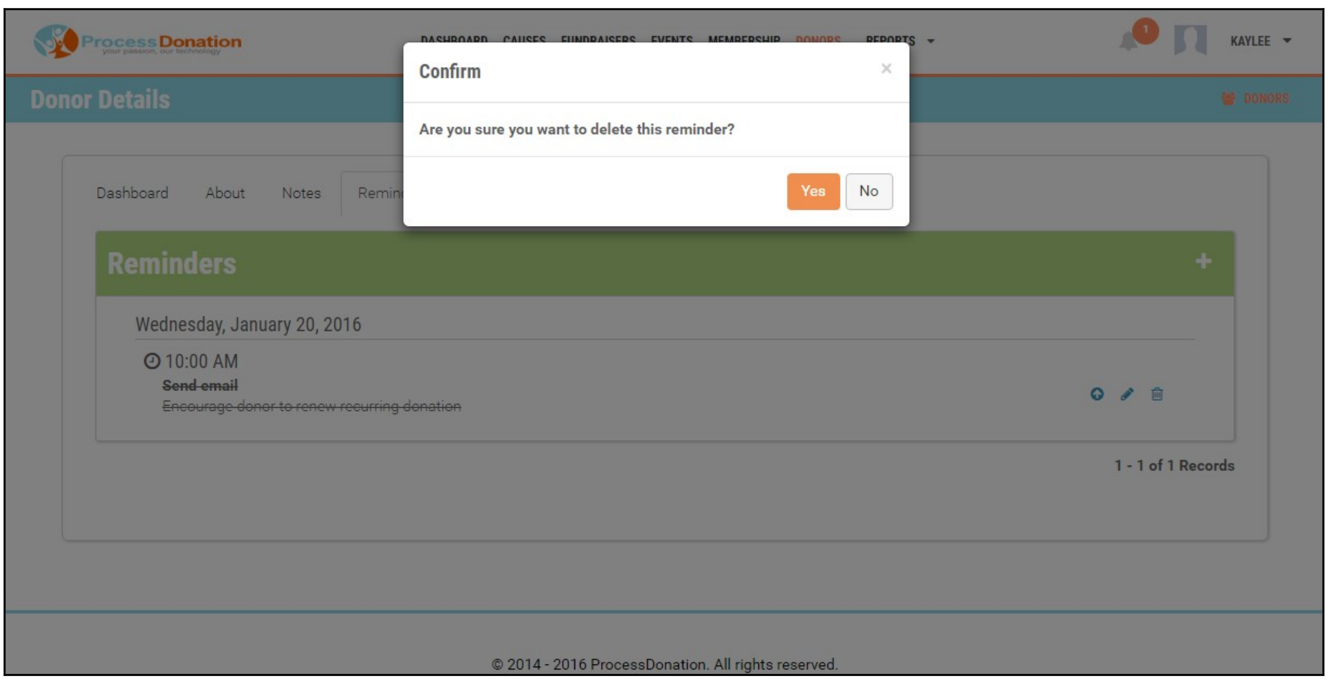


To mark a Reminder complete, you could click on the tick mark corresponding to the Reminder you want to mark as complete, which would change the Reminder as complete.





And to delete a Reminder you could click on the delete icon that is corresponding to the Reminder you wish to delete and confirm by appropriate action.



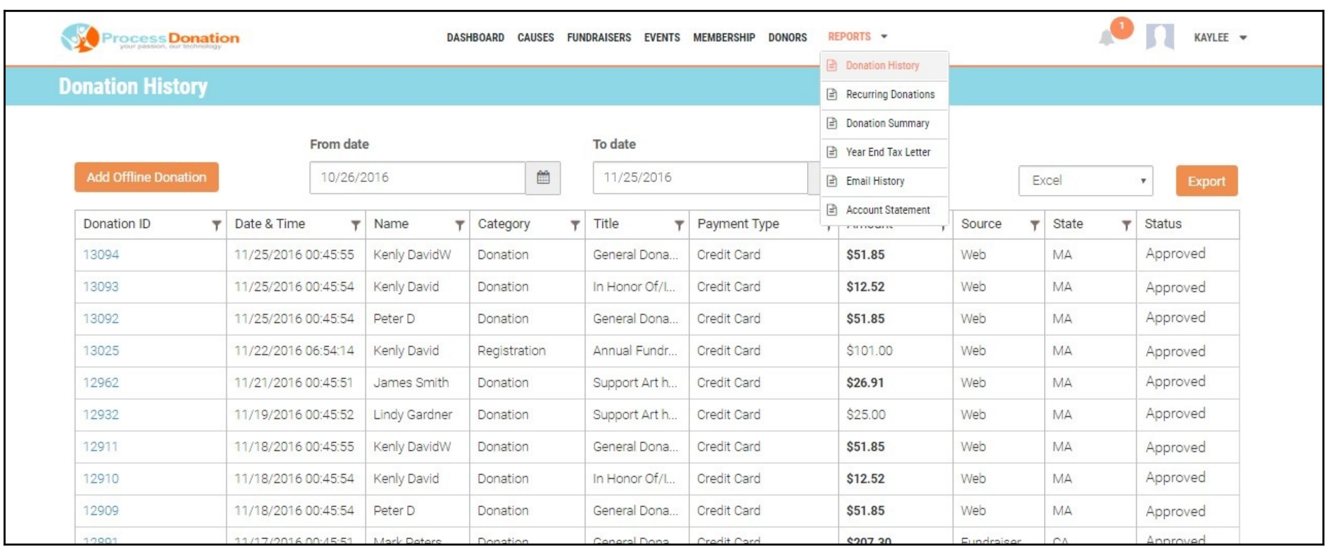
[PREVIOUS: DONOR]

DONATION HISTORY

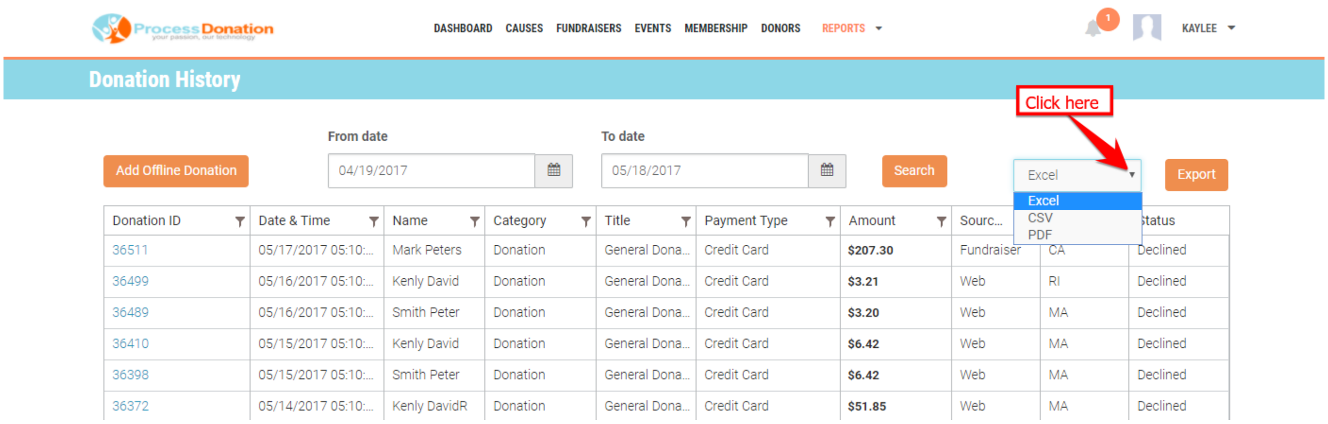
(Standard, Premium, & Ultimate)

You will be able to view and Export all of your transactions under the Donation History Report; the default view is a rolling prior 30 days in a grid format with the most recent transactions displayed at the top, see below. From here, you can:

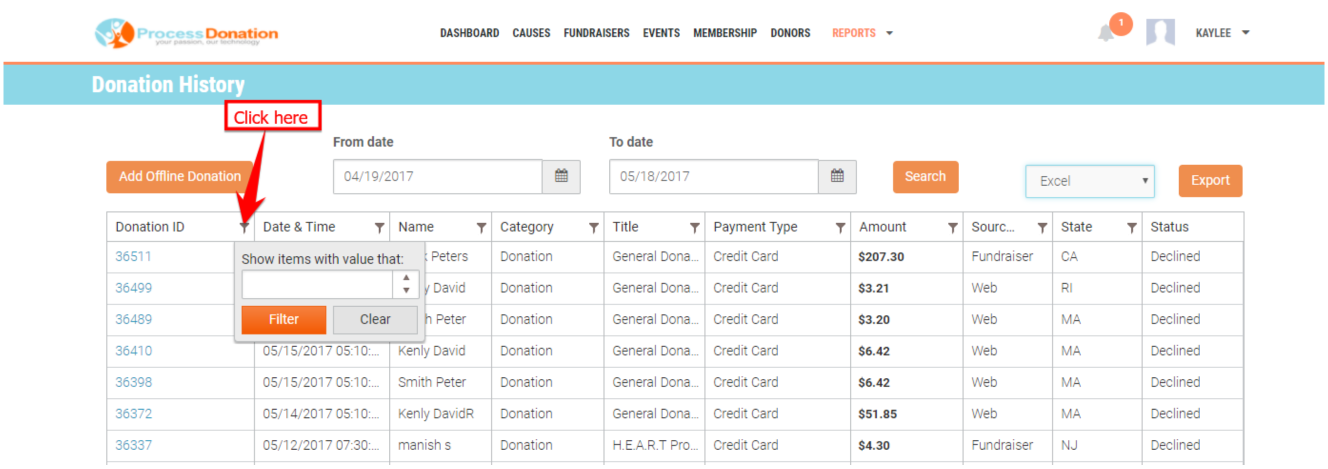
1. Change the particular date range by selecting **From Date** and **To Date** and clicking on the **Search** button.
2. View the details of a specific transaction by clicking on the Donation ID link.
3. Add Offline Donations, which are transactions not captured through a Donation / Fundraiser / Events / Membership page (aka "Online" transactions). You can set the date you want to attribute to the donation; you are not forced to using today's date.
4. Refund any Online Transaction.
5. Delete / Edit Offline Donations.
6. Update the Cause name for the Donations.
7. Print the transaction details of particular transaction.



The Donation History Report is exportable to Excel, CSV and PDF formats.



Sort by any field, and filter the transaction details.



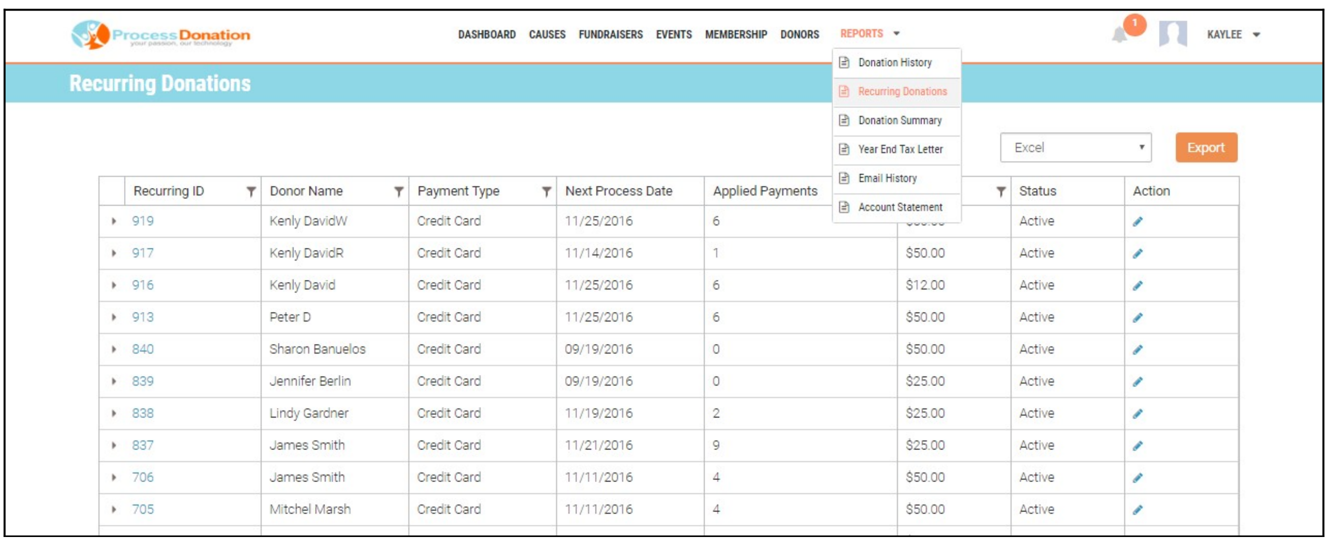
[NEXT: RECURRING DONATIONS]

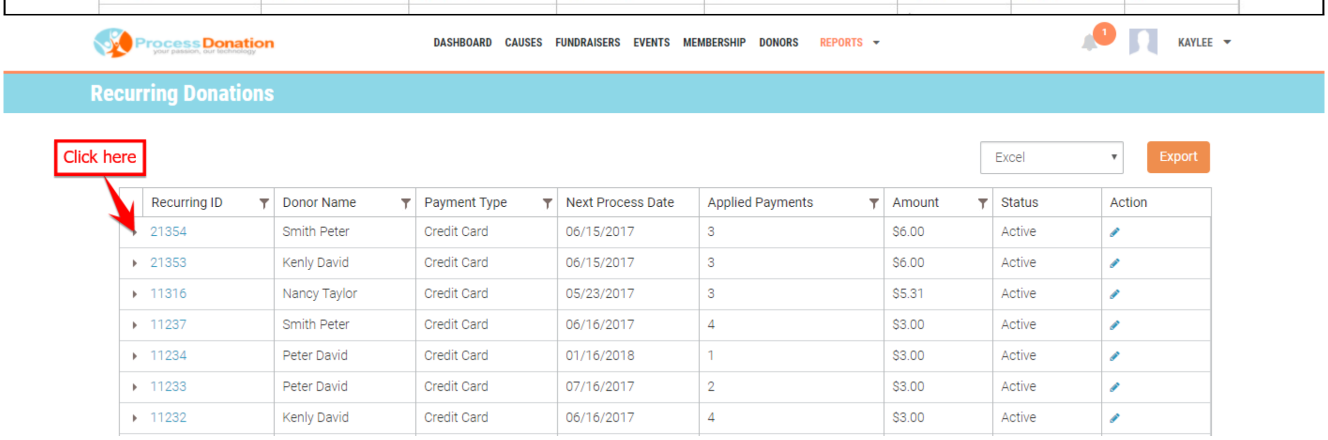
RECURRING DONATIONS

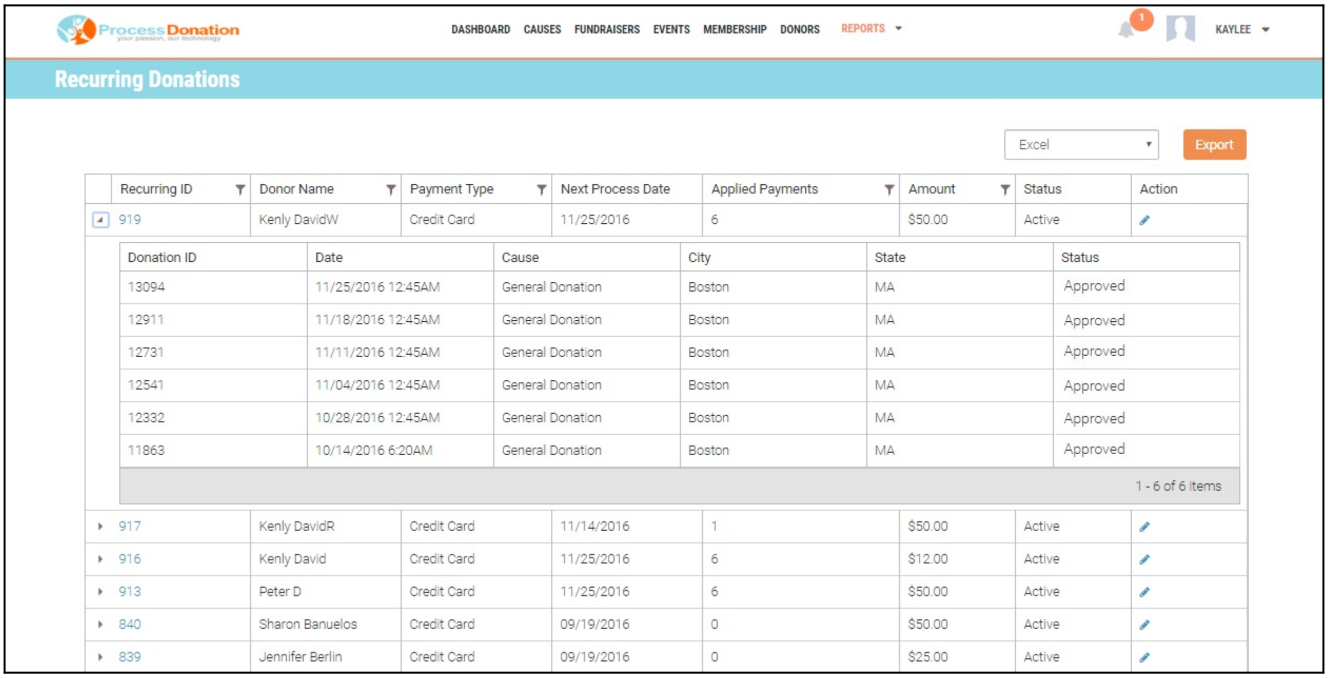
(Standard, Premium, & Ultimate)

The Recurring Donations Report will have a list of all the recurring transaction records available and displayed in a grid format in the order of most recent records first.

1. It is exportable to Excel, CSV and PDF formats.
2. You can sort or filter the Recurring details.
3. View the Recurring details by clicking on Recurring ID link.
4. Deactivate any Recurring Profile.
5. Edit any Recurring Profile by clicking on Edit icon.
6. View the list of all transactions processed for that particular recurring profile by clicking on hierarchy cell.







NEXT: DONATION SUMMARY

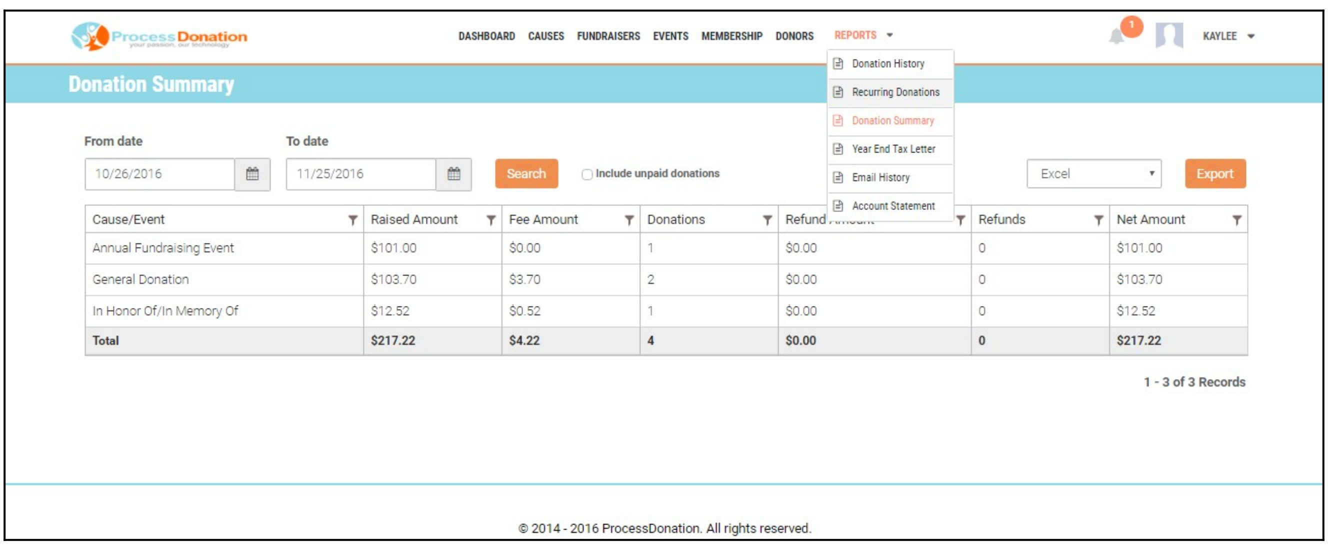
PREVIOUS: DONATION HISTORY

DONATION SUMMARY

(Standard, Premium, & Ultimate)

The Donation Summary Report will provide the transaction summary of each particular Cause/Event/Membership. By default, the Donation Summary Report will be generated for all the paid transaction records available for a rolling 30 days in a grid format in the order of most recent records first.

1. Generate a Donation Summary Report for a particular date range by selecting **From Date** and **To Date** and clicking on the **Search** button.
2. Generate a Donation Summary Report for both paid and unpaid transactions also by checking **Include unpaid donations** and clicking on the **Search** button.
3. The Donation Summary Report can be exported in the Excel, CSV and PDF formats.
4. You can sort and filter the Donation Summary details.



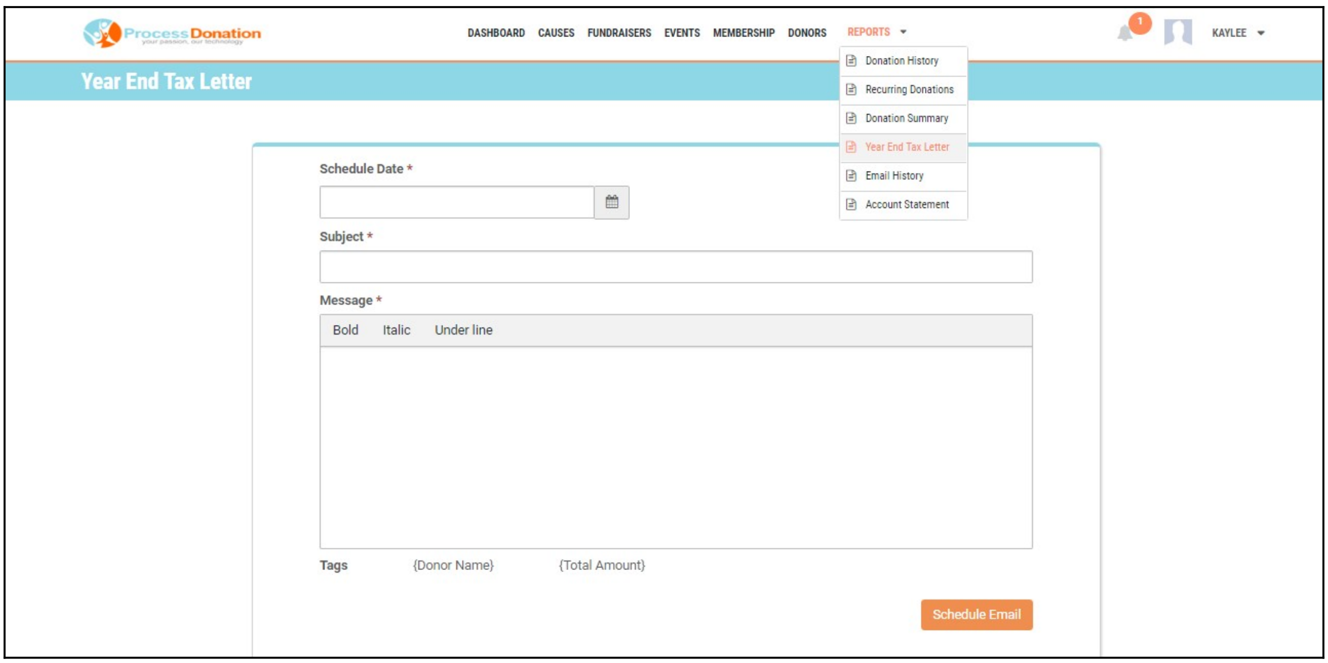
NEXT: YEAR END TAX LETTER
PREVIOUS: RECURRING DONATIONS

YEAR END TAX LETTER

(Ultimate)

You can schedule an email with transactions; here is what the report will have...

1. The Year End Tax report will be generated based on Donor Email IDs
2. Donations received from Fundraiser Portal
3. Donations received from Donation Pages
4. Offline Donations from all portals
5. Donation amount received from Registration and Membership Pages
6. Exclude Refund transactions



NEXT: EMAIL HISTORY

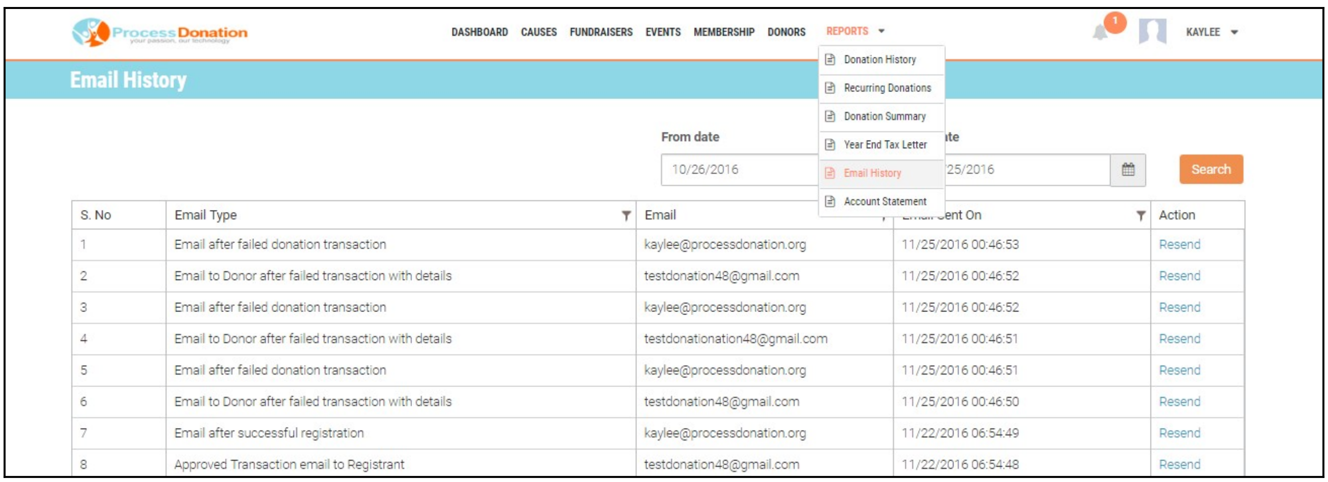
PREVIOUS: DONATION SUMMARY

EMAIL HISTORY

(Standard, Premium, & Ultimate)

You can view the list of all of your Emails triggered from our system, whether they are sent to Donors, Registrants, Fundraisers, or Members. By default, the Email History Report is generated for all the Email records available for a rolling 30 days in a grid format in the order of most recent records first.

1. Generate an Email History Report for particular date range by selecting **From Date** and **To Date** and clicking on the **Search** button.
2. Resend the particular email to the listed email address.



NEXT: ACCOUNT STATEMENT **PREVIOUS: YEAR END TAX LETTER**

ACCOUNT STATEMENT

(Standard, Premium, & Ultimate)

The Account Statement displays a summary of your transactions to be settled to your bank account, which is not the same as your authorized transactions. Most transactions are the same and it is a one to one relationship. Information on the Account Statement may show as delayed compared to when the other reports that display the information. However, if you received a donation that you refunded the same day then the numbers might be different. Your report when you have activity will list all of the Dates during the month. This is only for Online transactions, Offline transactions are not included. Please note the amount settled to your bank account can be a total of many transaction including sales and refunds, please see below under 7 - Net Donations for a more thorough explanation.

1. **Date:** This is the Date when the transaction was made online. Click on the Date to see the details.
2. **Donation Amount:** A sum total of the amount(s) your Donor(s) contributed during that Date.
3. **Refund Amount:** Typically any Donation you have provided back to the Donor during a Date different than the original Donation Date.
4. **Chargeback Amount:** If a Donation from a different Date is now being disputed by the Donor or their bank, then we will receive a Chargeback for you and deduct the amount of the disputed Donation from your Deposits until it's resolved.
5. **Chargeback Fee:** Whenever we process a Chargeback for you we charge a fee per your contract, that fee is listed here and deducted from your Deposit.
6. **Processing Fee:** The Processing Fees you have incurred from your Donations today.

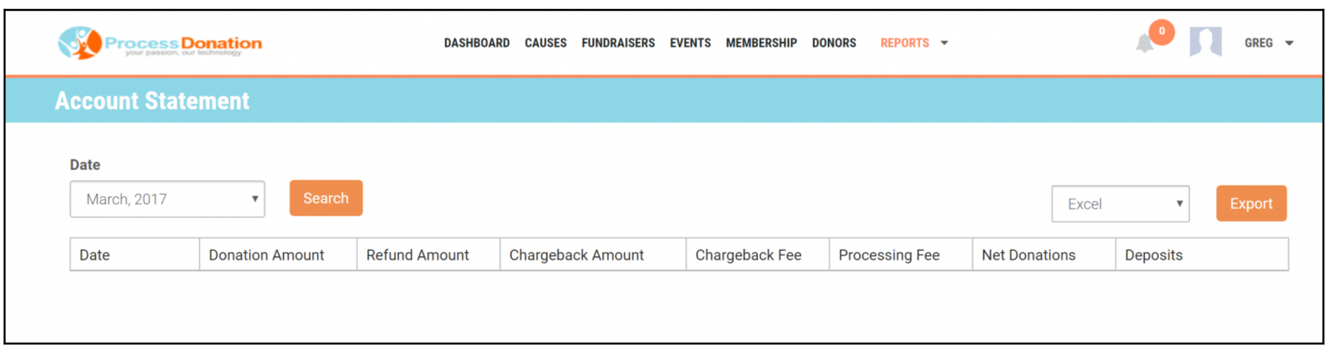
7. **Net Donations:** A field that adds fields 2 (Donation Amount) through 6 (Processing

Fee) to arrive at a dollar amount that will be deposited into your bank account in the future, which is typically 2 business days later. In rare circumstances your deposit may be delayed. To help us avoid delays, please make us aware of larger events or donations you are expecting.

8. **Deposits:** These are dollars received from activity from prior days. Due to the nuances of the banking system (i.e., federal holidays, banking days vs. non banking days, your particular bank's ACH policies, etc...) the Date these Deposits are listed on is our best guess as to when you will receive your funds in your bank account. If you do not receive your funds on the indicated Date, please wait until the next business day and check your account before contacting us.

By default, Account Statement Report is generated for current month in a grid format in the order of most recent day.

You can generate an Account Statement Report for particular Month & Year by selecting **Month & Year** and clicking on the **Search** button.



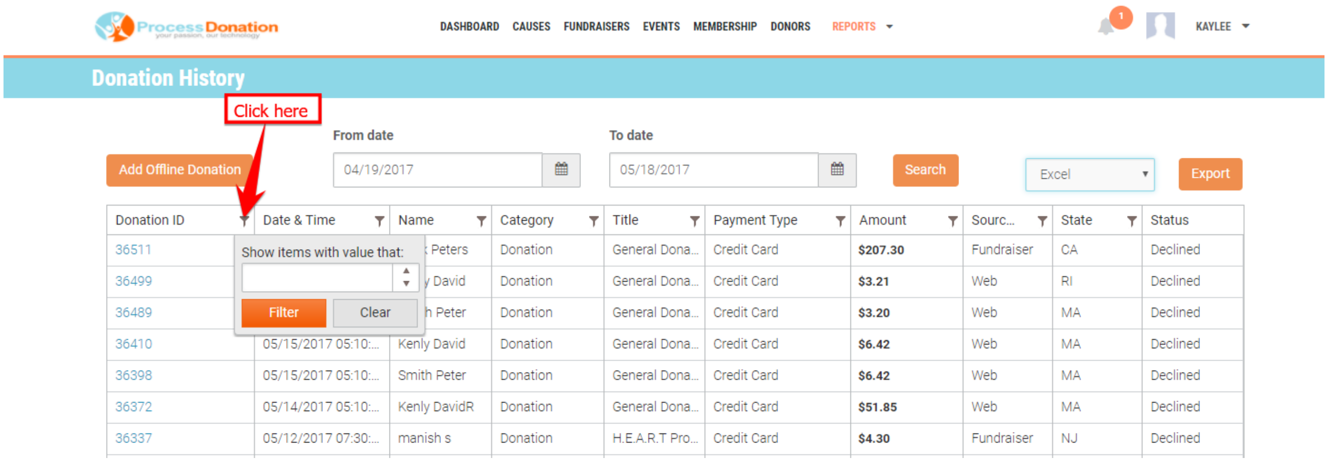
NEXT: REPORT EXPORT AND REPORT FILTERS

PREVIOUS: EMAIL HISTORY

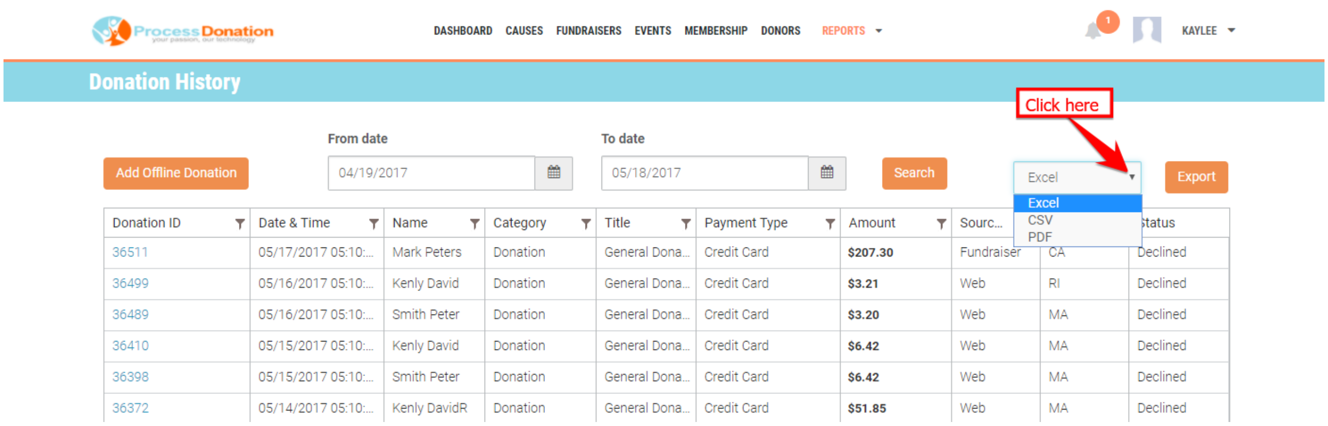
REPORT EXPORT AND FILTERS

(Standard, Premium, & Ultimate)

You pull particular set of records using filter option available in all of the reports.



You can download a copy of the report in CSV, Excel and PDF formats.

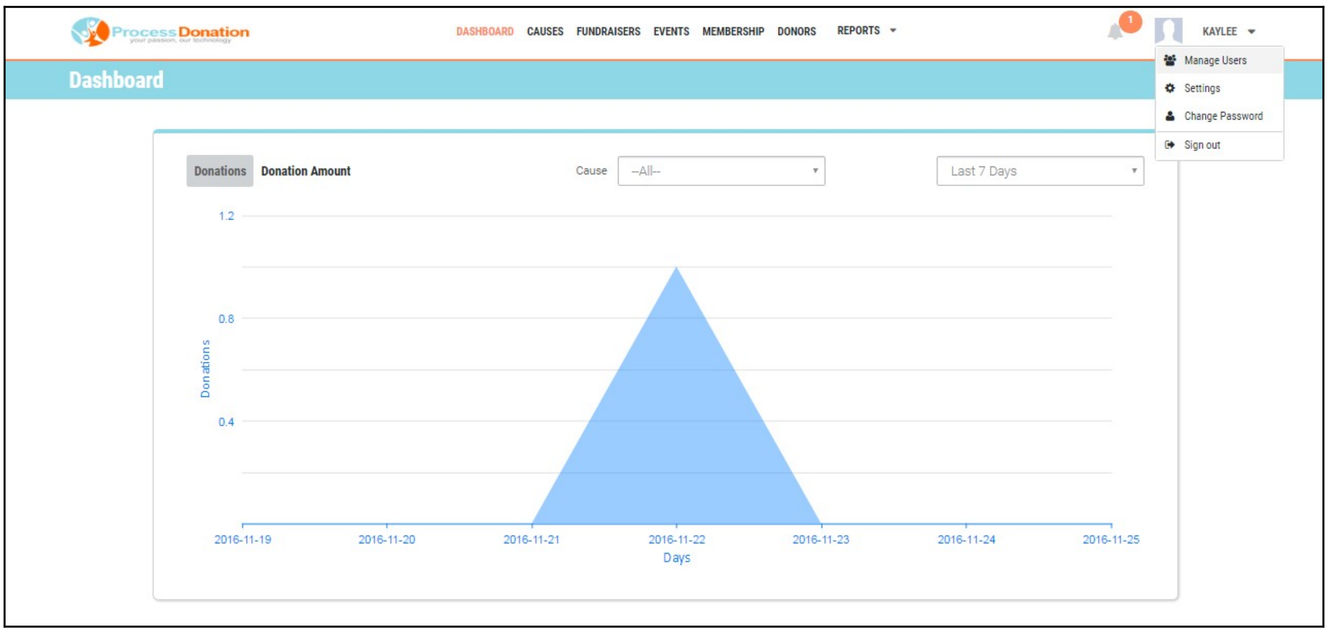


PREVIOUS: ACCOUNT STATEMENT

INTRODUCTION TO SETTINGS

(Standard, Premium, & Ultimate)

With the help of the Settings page, you can change your password, create new users; define their role thereby restricting their access levels and customize the automatic emails that Process Donation's platform will send upon triggering, such as Organization alerts, BCC alerts, Donation, and Events. Also, you can upload images and enable Extensions to third party solutions. These features will help you to further customize your use of our platform.



NEXT: Manage Users

MANAGE USERS

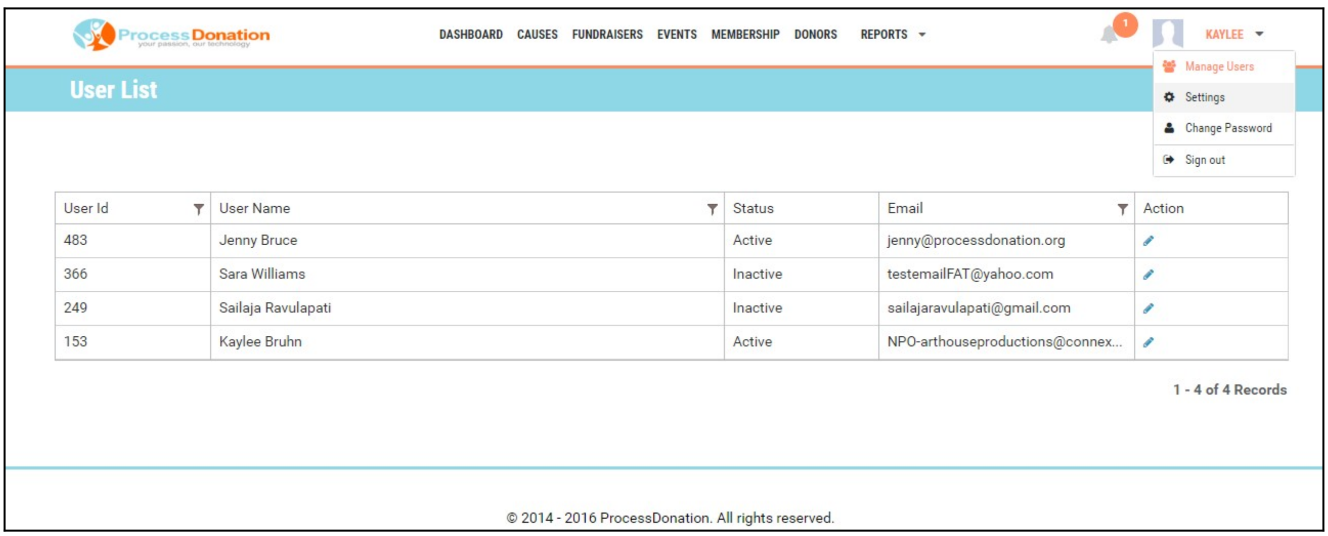
The User module is designed to give you the ability to create the users with Admin and User role permissions.

Admin Role:

You can add the admin role user; the user will have read/write permissions for entire application;

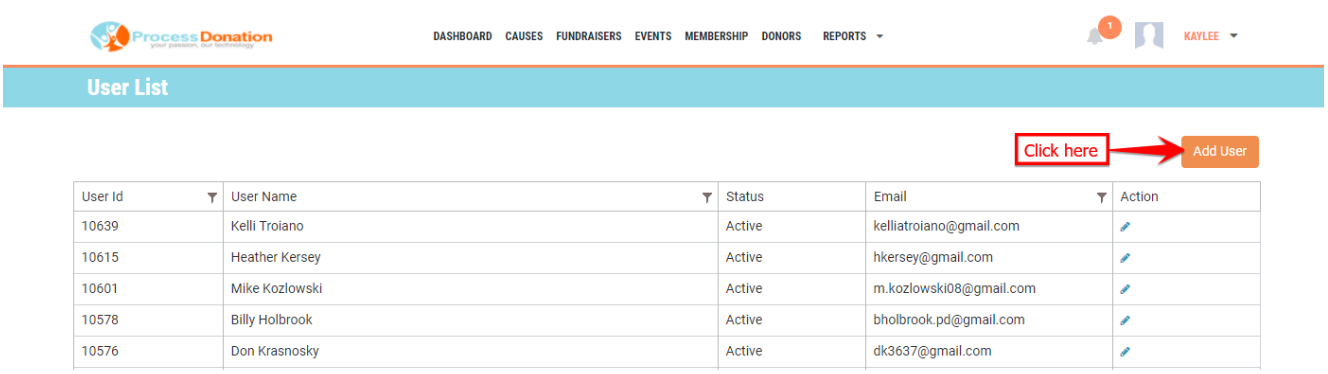
User Role:

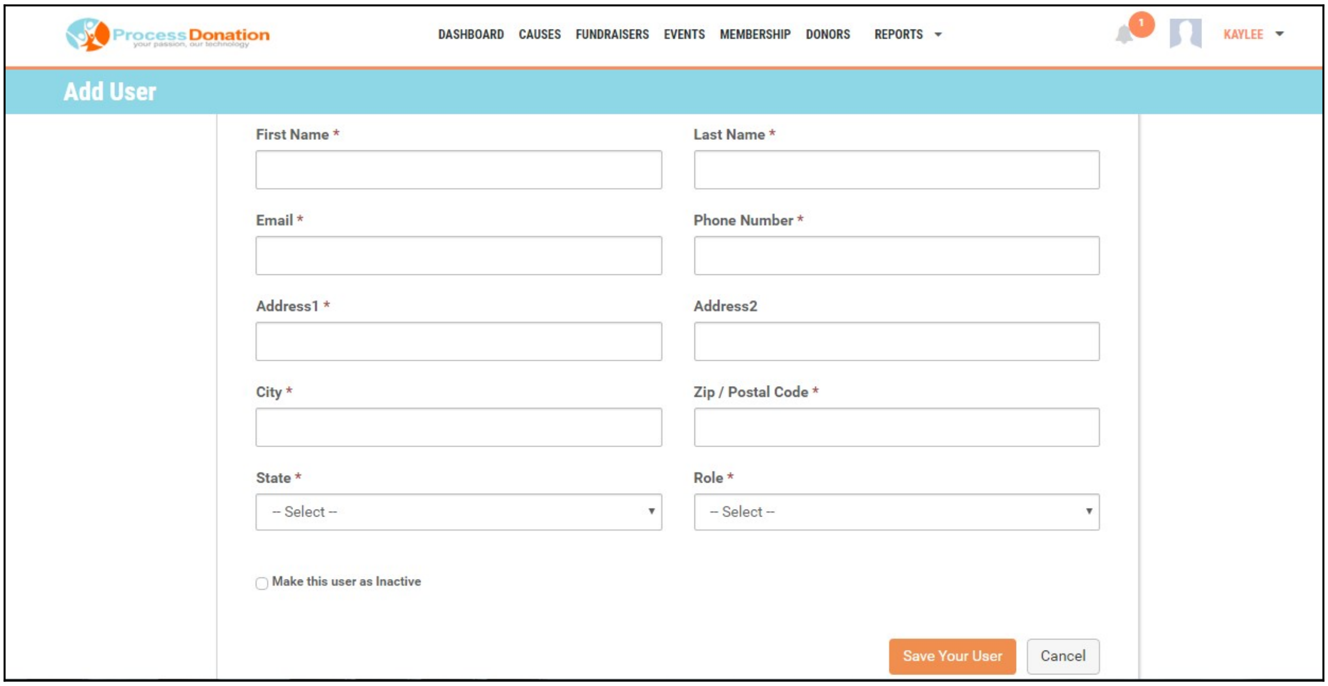
You can add the user role; the user will have read permissions for entire application.



Add User

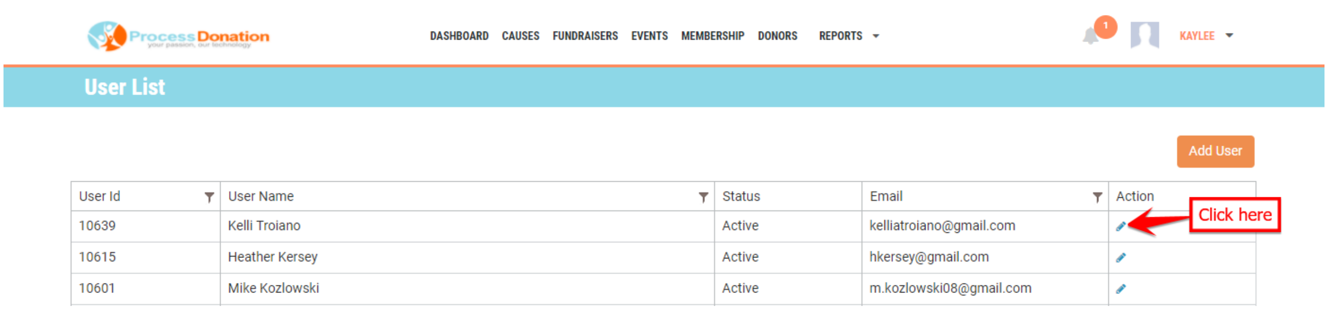
In Order to add a user, you need to provide the user First Name, Last Name, Email, Phone Number, Address and User Role.





Edit User:

You can always edit the user information like first name, last name, phone number, Address, Active/Inactive and User role, and to achieve this you simply have to click o the edit icon corresponding to the user name.



Next: Settings **Previous:**

Introduction to Settings

SETTINGS

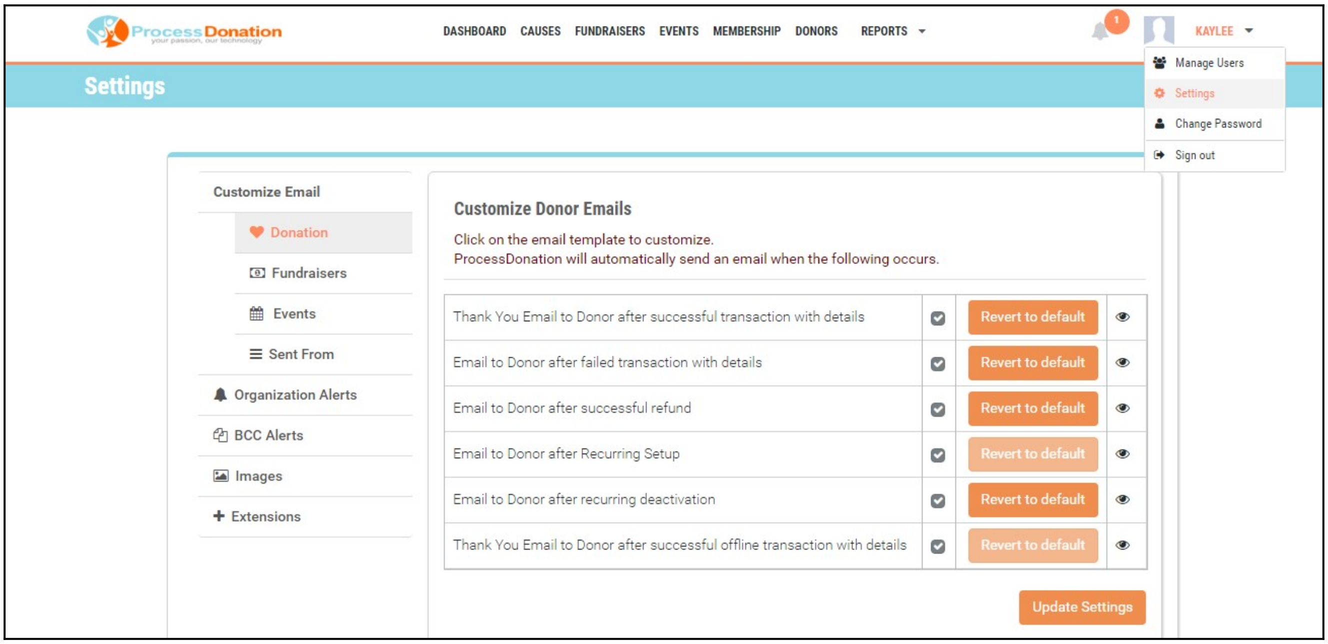
Customize Email

You can customize not only the content of the auto email notifications the Process Donation platform can generate for you, but also whether or not the platform generates the Email. The process of triggering emails is automatic and the system will handle this for you, but here you are provided with the ability to customize email templates per your need and you have an option to preview each of them before finalizing and updating the changes. For each of the different Email categories: Donation, Fundraiser, Events (and Memberships), and Organization Alerts, you can control:

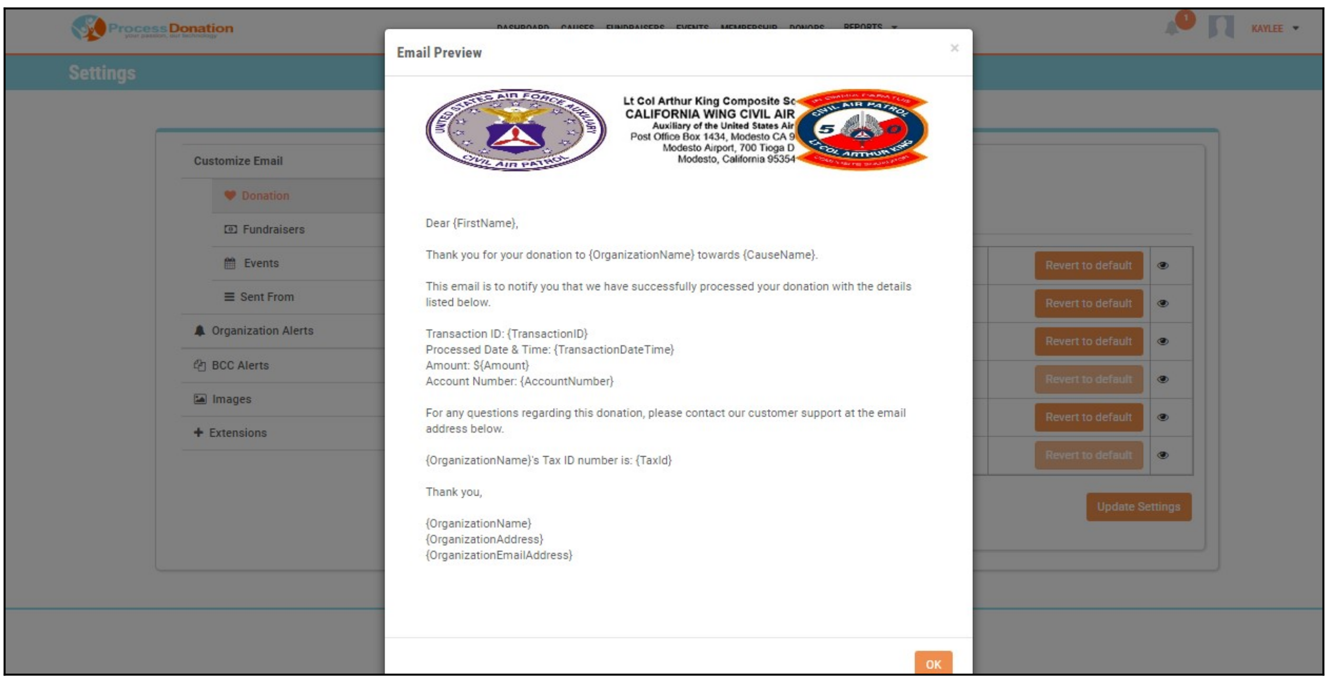
1. Customize the Email message by clicking on the email template name.
2. View a preview of the Email by clicking on the eyeball icon to the right.
3. Toggle auto delivery on or off by clicking on the check box.
4. Revert the Email template to the Process Donation default (for that particular action) by clicking on the Revert to Default button

Donation

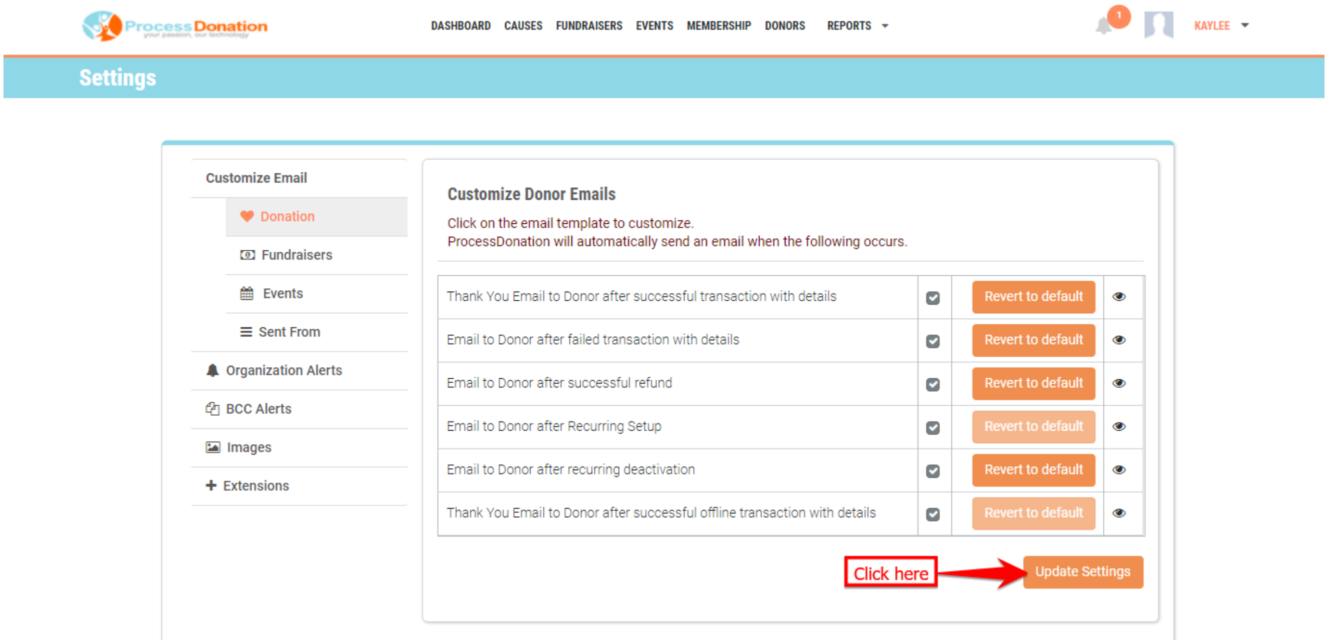
Process Donation will provide a default template to send an email automatically to donors for different activities related to donations based on the direction you set in this section. You can uncheck all of the boxes if you do not want emails going out, or you can pick and choose the automatic emails that make the most sense for your organization.



To view an email template simply click on the eye icon that is corresponding to the email template.



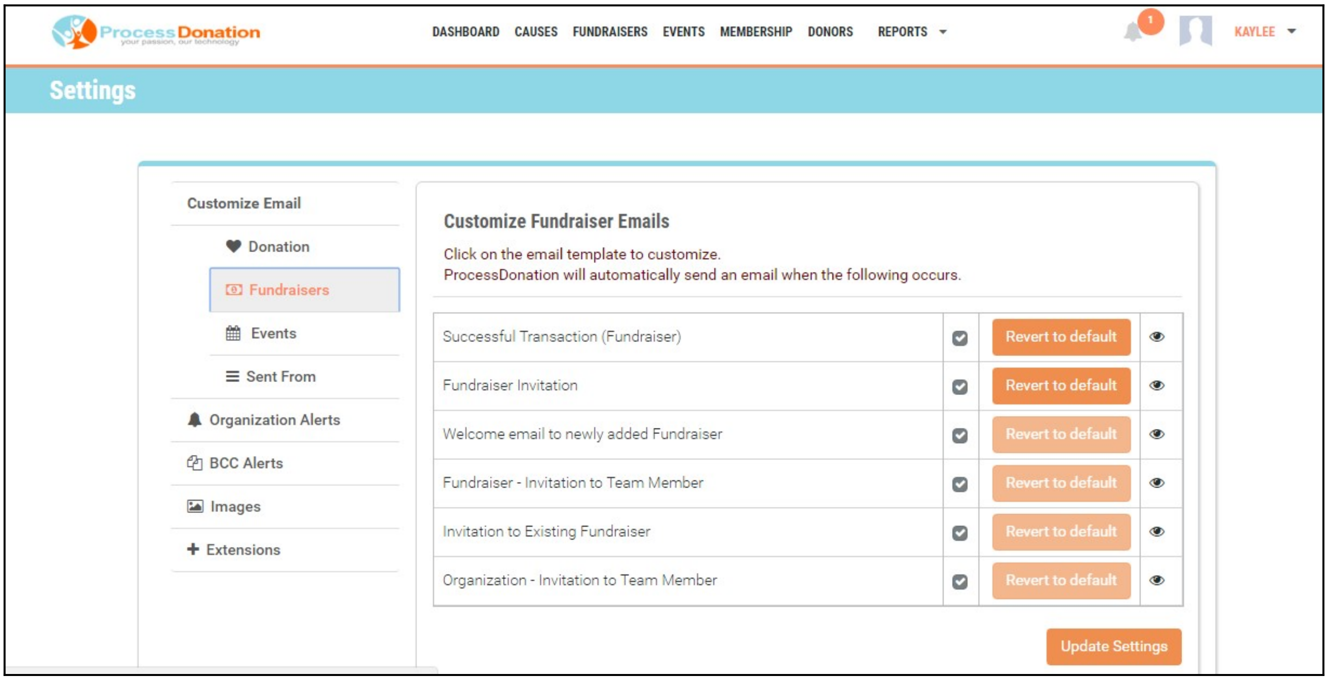
After you are done with your changes in this page please **do not** ignore clicking the on **Update Settings** button to save changes.



Fundraisers

(Premium & Ultimate)

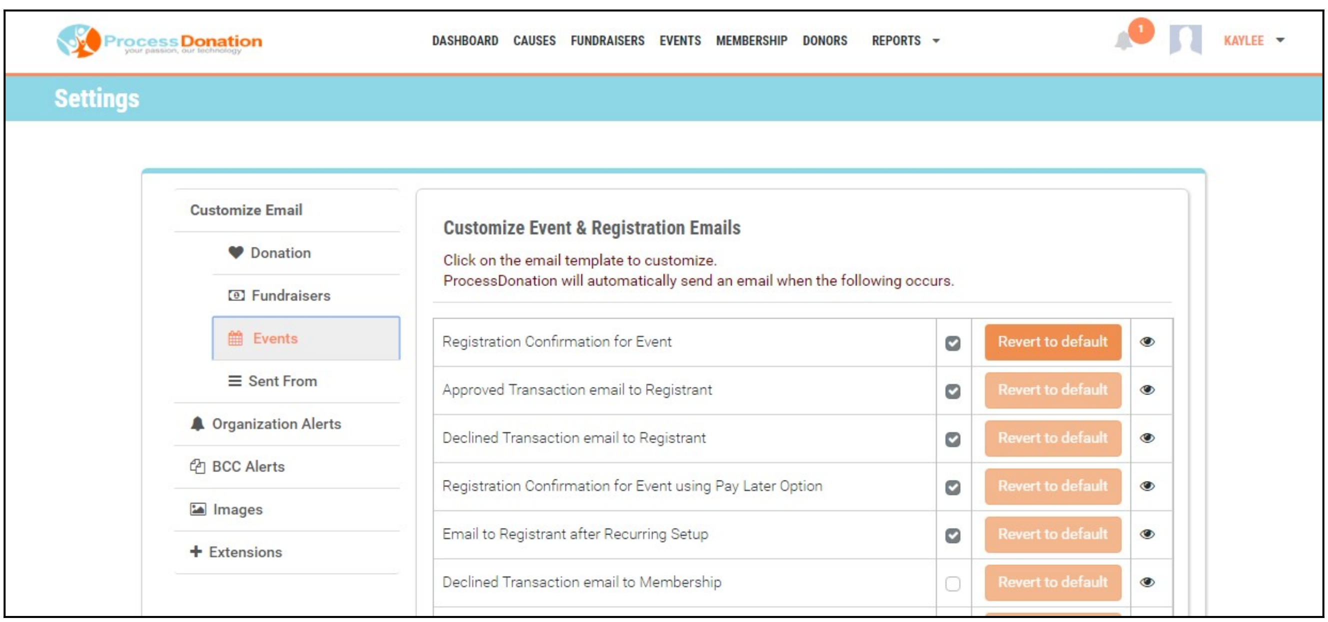
Just like the other sections, we provide default templates that can be used to share with your fundraisers, and we have templates that are relevant to different activities related to your Fundraisers.



Events

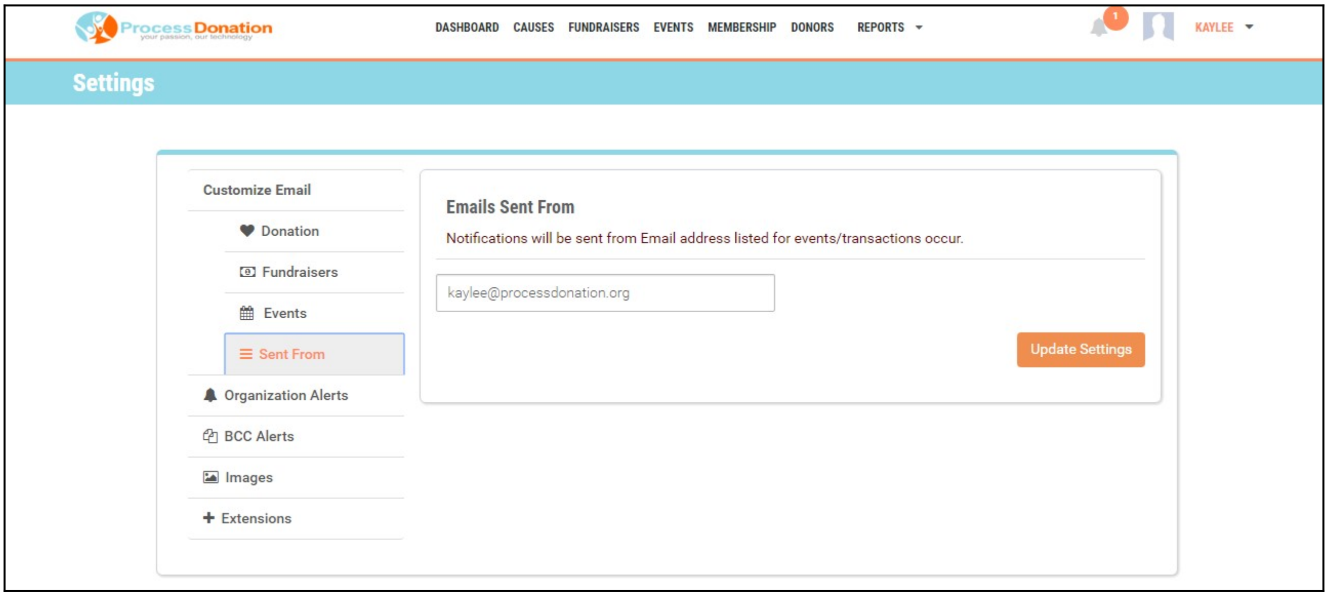
(Ultimate)

Similar to Fundraisers, we provide default templates that can be used to share with your Registrants, with templates that are relevant to different activities.



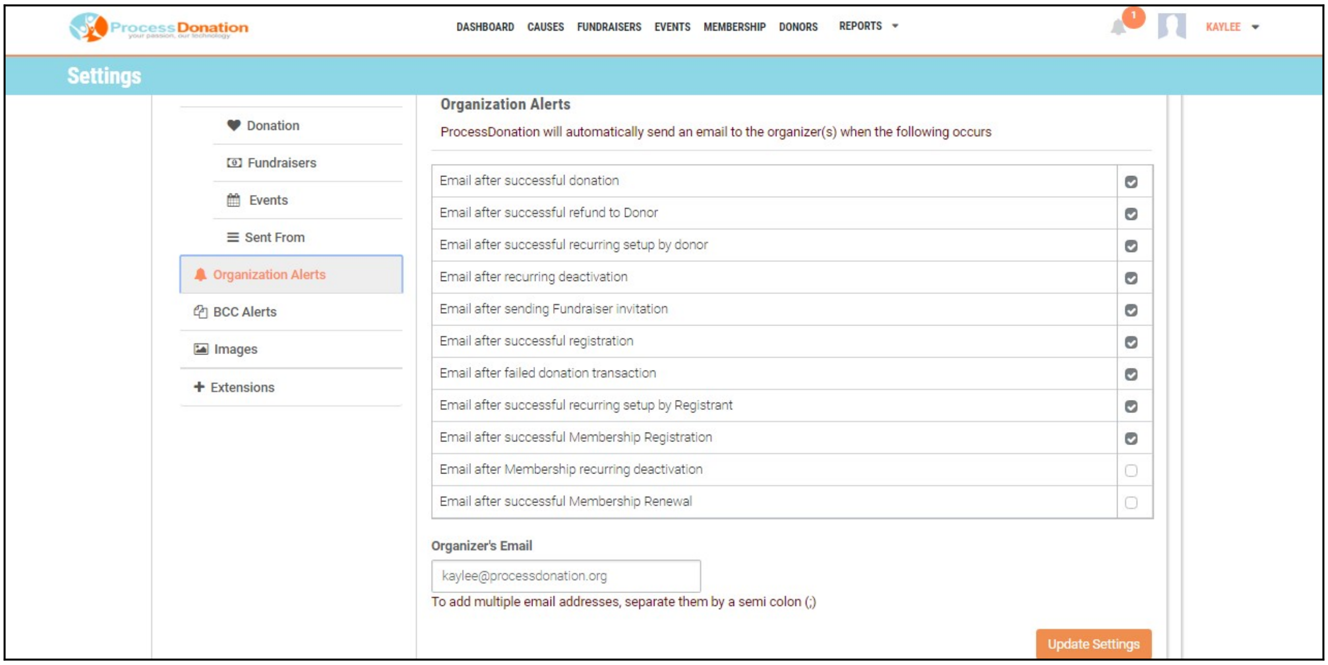
Sent from

Email address entered in **Email Sent From** section will appear as the from address on all the Notification emails triggered by the system. You can always change the from email address.



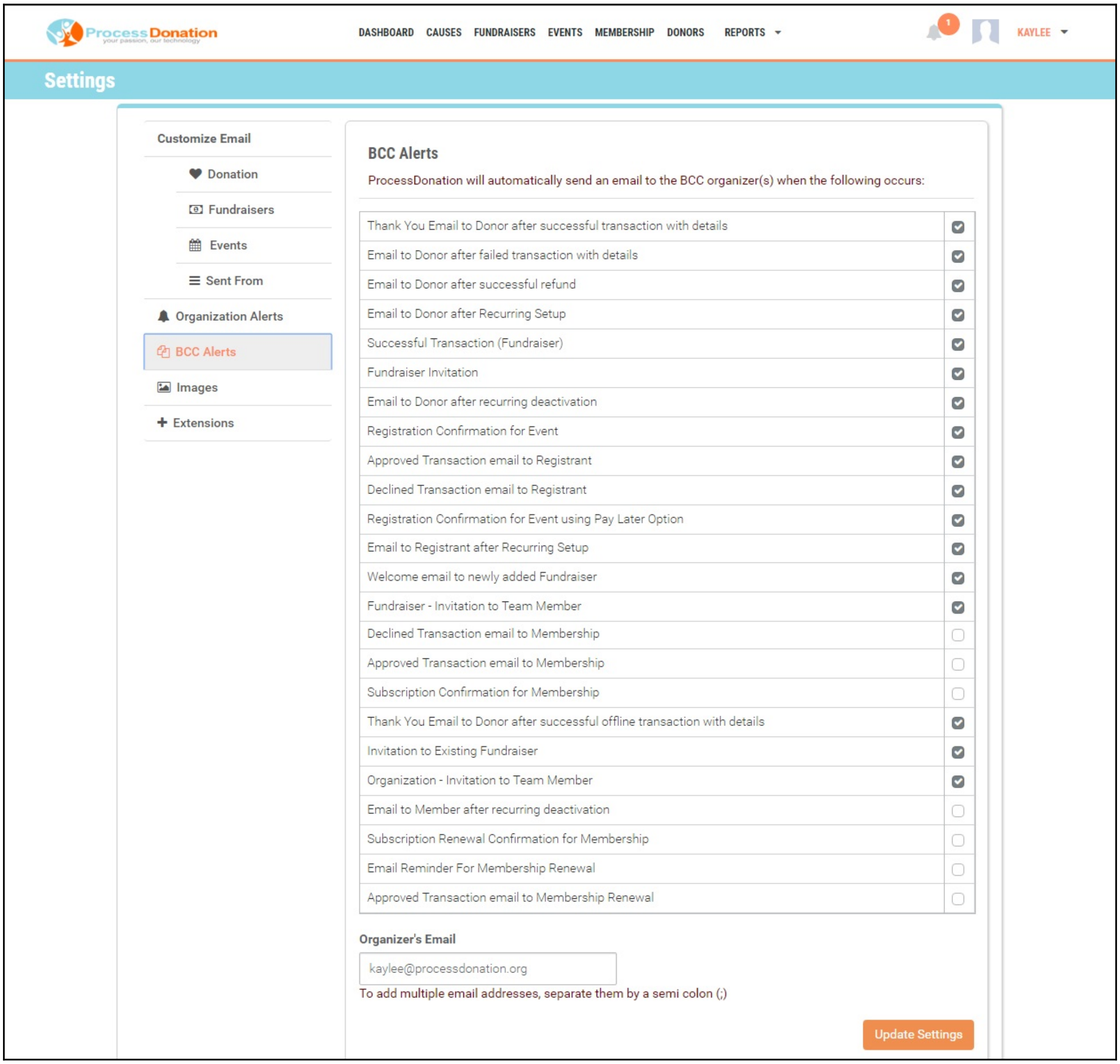
Organization Alerts

Process Donation will automatically send emails to the emails IDs mentioned under **Organizer(s) Email** field, you can select which alerts to receive by simply enabling the check box corresponding to the email template. You can provide more than one email ID separated by semicolon (;).



BCC Alerts

We will automatically send emails to the emails IDs mentioned under **Organizer(s) Email** field, you can select which alerts to receive by simply enabling the check box corresponding to the email template. You can provide more than one email ID separated by semicolon (;).



Images

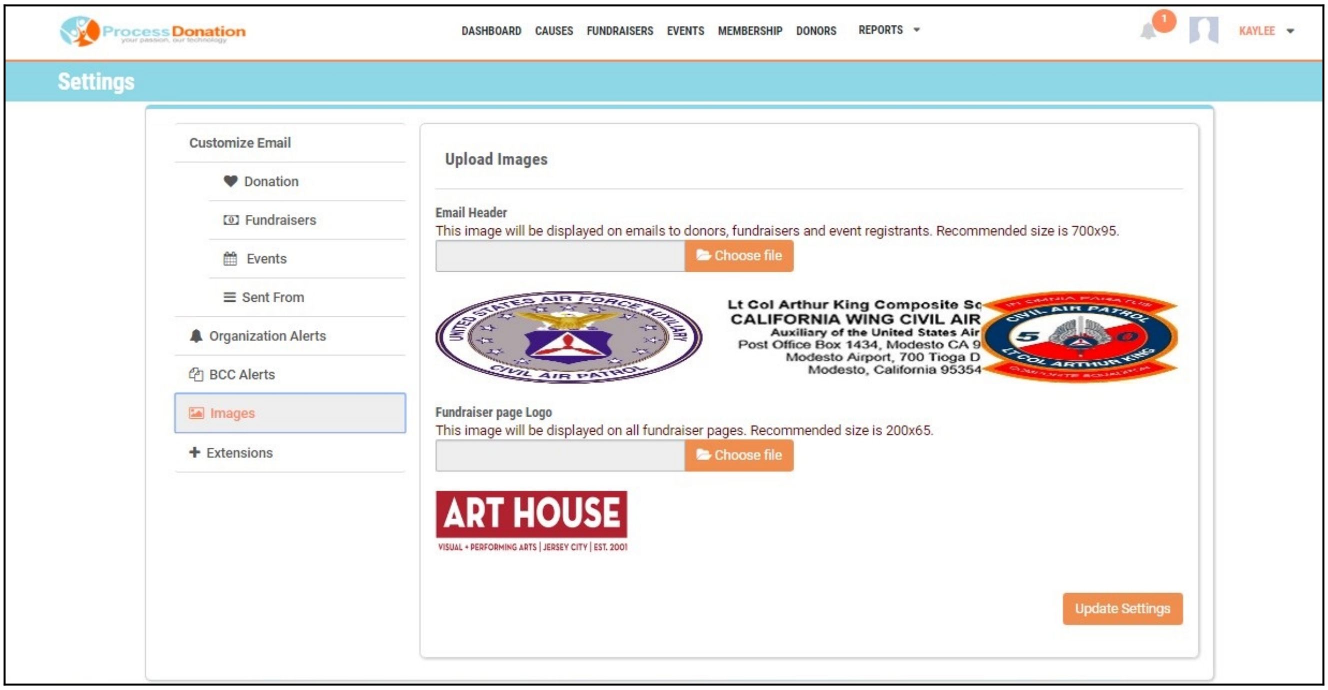
You can upload the images to customize your Email Header and Fundraiser page logo.

Email Header

This image will be displayed on emails that are sent to donors, fundraisers and event registrants. Recommended size is 700x95.

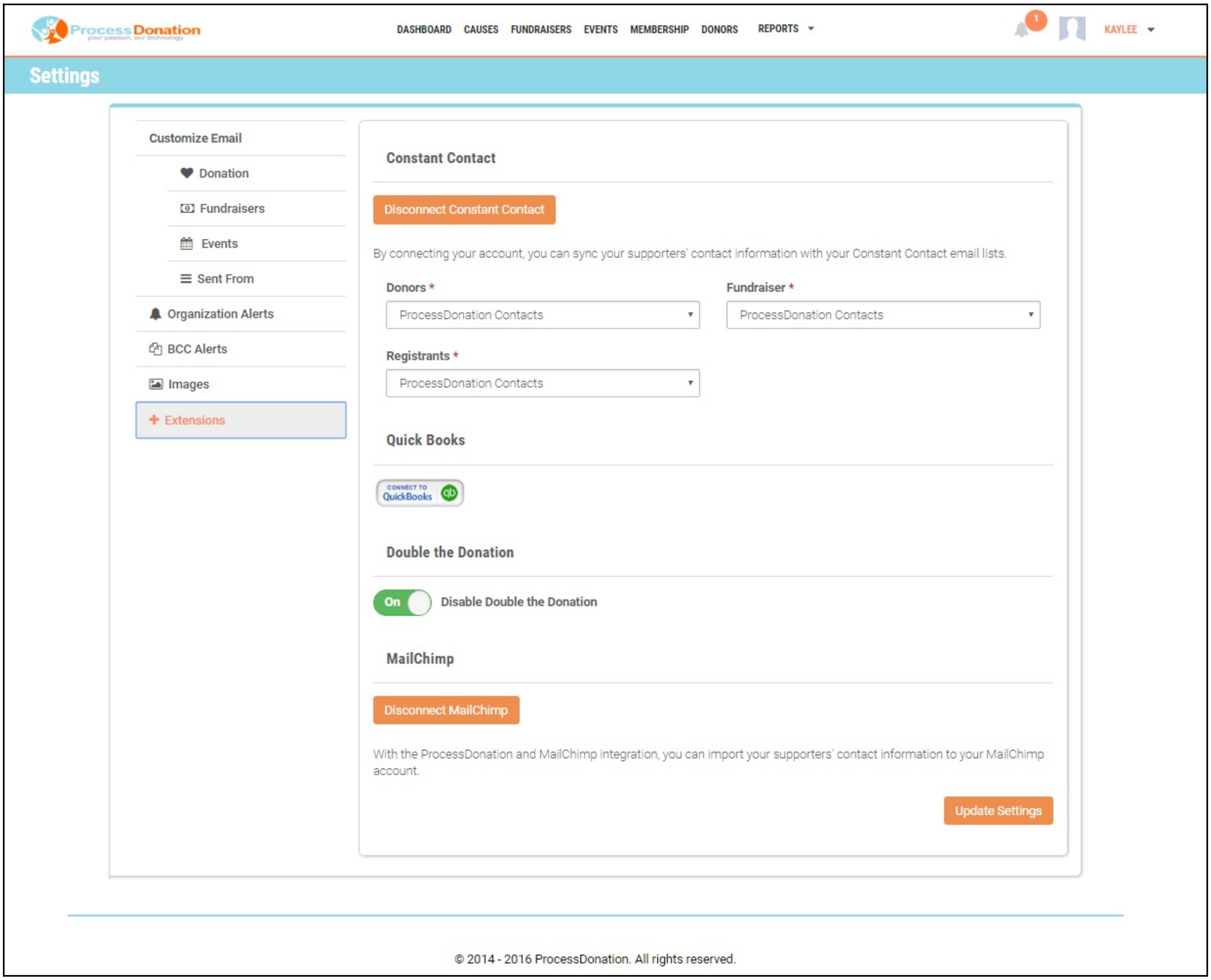
Fundraiser Page Logo

This image will be displayed on all fundraiser pages. Recommended size is 200x65.



Extensions

Extensions section will have the list of third party integrations that empower you to seamlessly integrate our services with other top tier services providers to get even more out of using Process Donation. Here you will find the list of third party integrations that you can choose to switch on or off.



Constant Contact

(Ultimate)

Syncing your Process Donation account with Constant Contact will help you sync your supporters' contact information with your Constant Contact mailing lists, where the application enables you to organize your contacts, by creating groups, sub-groups etc. When you click on the button you will be taken to a Constant Contact hosted screen asking you to Sign In or Sign up for Constant Contact; Process Donation has no involvement in your Constant Contact relationship. After connecting to Constant Contact you have an option to create lists.

Quick Books Online

(Ultimate)

By connecting your account, you can sync your supporters' contact information with your Quick Book emails list and customers list.

Double the Donation

(Ultimate)

We have partnered with an organization that enables you to offer your Donors a Matching Gift Program. It is defined as “A type of corporate giving program in which company matches donations made by employees to eligible nonprofit organizations." Every time your donation page(s) is displayed to a potential donor you can ask them to participate in searching the corporate database to see if their employer participates. If they do, then the donor will receive instructions on how to instruct their employer to match the donor's contribution to you.

Mail Chimp

(Ultimate)

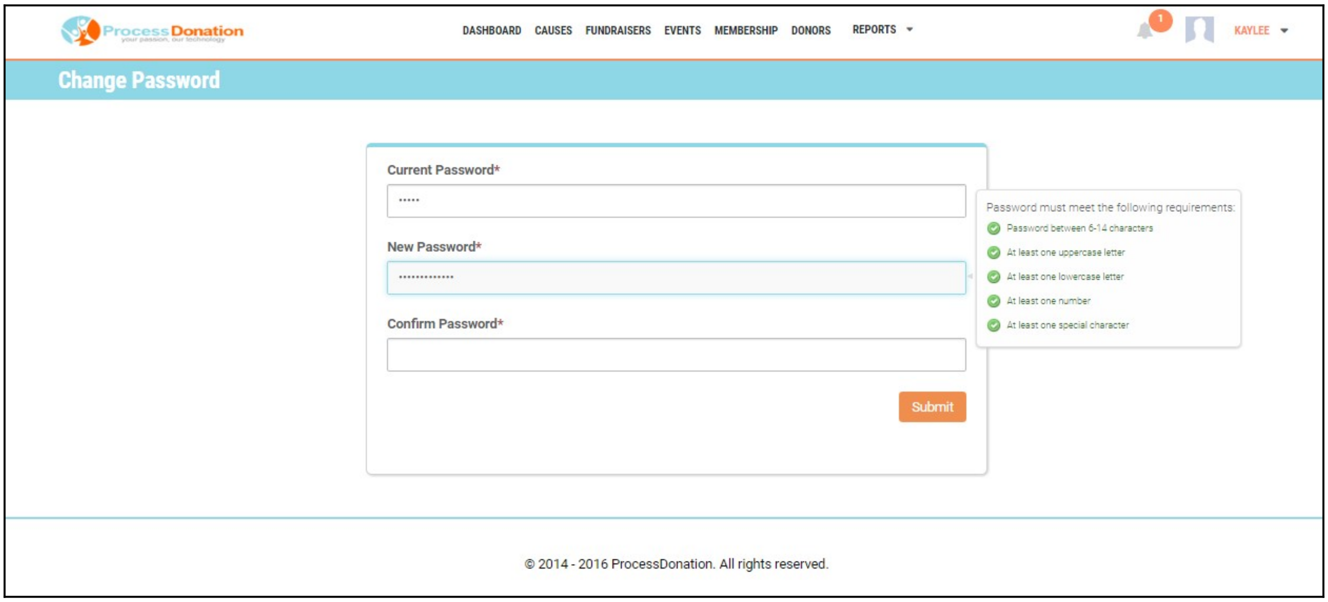
Syncing your Process Donation account with Mail Chimp will help you sync your supporters' contact information with your Mail Chimp mailing lists, where the application enables you to organize your contacts, by creating groups, sub-groups etc. When you click on the button you will be taken to a Mail Chimp hosted screen asking you to Sign In or Sign up for Mail Chimp; Process Donation has no involvement in your Mail Chimp relationship. After connecting to Mail Chimp you have an option to create lists.

Next: Change Password **Previous:**

Manage Users

CHANGE PASSWORD

Any user can change their password when they wish to. They will be required to follow the password generation standards listed in the picture below.



[Previous: Settings](#)