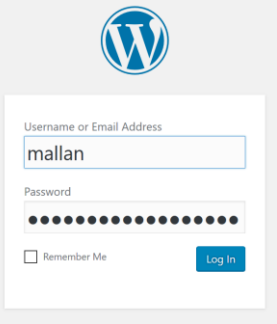
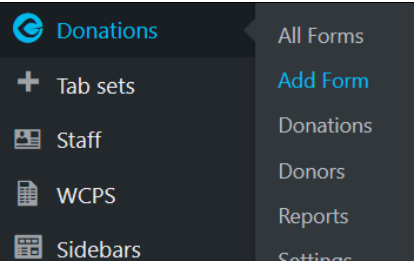


How do I create a new Donation / Fundraising campaign

Introduction

The purpose of this document is to explain and demonstrate how to create a new fundraising campaign

Instructions

| | |
|---|--|
|  <p>A screenshot of the WordPress login page. It features the WordPress logo at the top left. Below it is a form with two input fields: 'Username or Email Address' containing the text 'mallan' and 'Password' with masked characters. There is a 'Remember Me' checkbox and a 'Log In' button.</p> | <p>First you must sign into the dashboard of the site with your own userid and password.</p> <p>To get to the dashboard you click on the following link</p> <p>http://www.shatfordcentre.com/admin</p> |
|  <p>A screenshot of the WordPress dashboard sidebar menu. The 'Donations' item is highlighted in blue. A sub-menu is open, showing options: 'All Forms', 'Add Form', 'Donations', 'Donors', 'Reports', and 'Settings'.</p> | <p>From the dashboard hover over the “Donations” item and select “Add Form”</p> |
| | <p>Enter the title of the fundraising campaign. This is what will appear on the menu.</p> <p>An example would be “Garden of Hope”.</p> |

You will now need to enter information about the fundraising/ Donation campaign

Donation Options

Donation Form Options

| | |
|--|--|
| Donation Options | Donation Option <input checked="" type="radio"/> Multi-level Donation <input type="radio"/> Set Donation |
| Form Display | <i>Do you want this form to have one set donation price or multiple levels (for example, \$10, \$20, \$50)?</i> |
| Donation Goal | Display Style <input checked="" type="radio"/> Buttons <input type="radio"/> Radios <input type="radio"/> Dropdown |
| Form Content | <i>Set how the donations levels will display on the form.</i> |
| <input checked="" type="checkbox"/> Terms & Conditions | Custom Amount <input type="radio"/> Enabled <input checked="" type="radio"/> Disabled |
| Offline Donations | <i>Do you want the user to be able to input their own donation amount?</i> |
| Email Notifications | |

Donation Level

| | |
|---------|---|
| Amount | <input type="text" value="\$ 1.00"/> |
| Text | <input type="text" value="Donation Level"/> |
| Default | <input checked="" type="radio"/> Default |

[Add Level](#)

In this panel the fields are self-explanatory however, you need to indicate whether you want a customer to pick from a list of set amounts or whether they can enter their own amount.

To add levels of donation you enter the amount some text related to the amount and whether that level is the default amount that appears on the form.

Form Display

This panel requires no input unless you wish to change the text that appears on the button when a customer makes the donation.

Donation Goal

If you wish to have a donation goal (i.e. Stop taking donations once the goal is reached) then you need to enable donation goal. This will display more fields.

Donation Form Options

| | |
|--|---|
| <ul style="list-style-type: none"> Donation Options Form Display Donation Goal Form Content Terms & Conditions Offline Donations Email Notifications | <p>Donation Goal <input checked="" type="radio"/> Enabled <input type="radio"/> Disabled</p> <p><i>Do you want to set a donation goal for this form?</i></p> |
| | <p>Goal Format <input checked="" type="radio"/> Amount Raised</p> <p><input type="radio"/> Percentage Raised</p> <p><input type="radio"/> Number of Donations</p> <p><input type="radio"/> Number of Donors</p> <p><i>Do you want to display the total amount raised based on your monetary goal or a percentage? For instance, "\$."</i></p> |
| | <p>Goal Amount <input type="text" value="\$ 1.00"/></p> <p><i>This is the monetary goal amount you want to reach for this form.</i></p> |
| | <p>Progress Bar Color <input type="color" value="#008000"/> <input type="button" value="Select Color"/></p> <p><i>Customize the color of the goal progress bar.</i></p> |
| | <p>Close Form <input type="radio"/> Enabled <input checked="" type="radio"/> Disabled</p> <p><i>Do you want to close the donation forms and stop accepting donations once this goal has been met?</i></p> |

1. Goal format – What is your goal and how will it be displayed on the site
2. The amount of the goal
3. A progress bar can be shown as donations are made and this field allows you to pick the colour of the progress bar
4. Lastly indicate that the form be closed when the goal is met.

Form Content

Donation Form Options


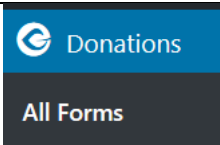
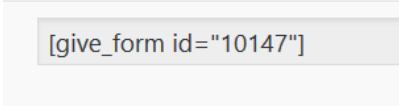
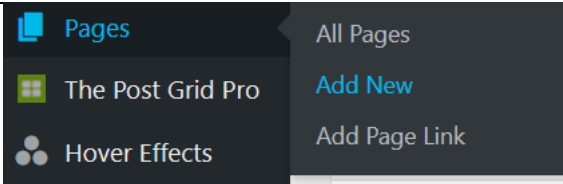
| | |
|--|---|
| ♥ Donation Options | Display Content <input checked="" type="radio"/> Enabled <input type="radio"/> Disabled <i>Do you want to add custom content to this form?</i> |
| 🖨 Form Display | |
| 🎯 Donation Goal | Content Placement <input checked="" type="radio"/> Above fields <input type="radio"/> Below fields <i>This option controls where the content appears within the donation form.</i> |
| ✍ Form Content | |
| ✔ Terms & Conditions | Content <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Add Media Insert Video Add slider [] ADD EVENTON Give Shortcodes ▼ </div> <div style="border-bottom: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Paragraph ▼ B <i>I</i> ☰ ☰ “ ☰ ☰ ☰ 🔗 ☰ ABC ✂ 📄 ⏪ FAQs </div> <div style="height: 150px;"></div> </div> </div> <p><i>This content will display on the single give form page.</i></p> |
| 📄 Offline Donations | |
| ✉ Email Notifications | |

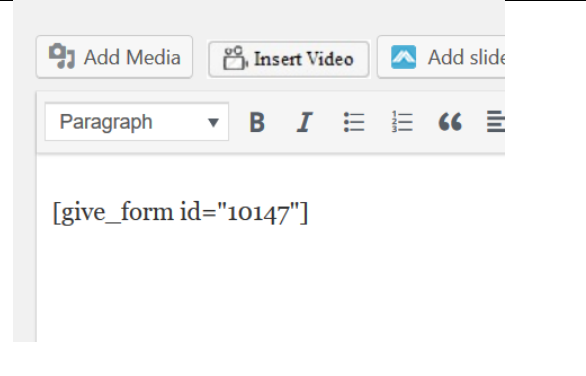

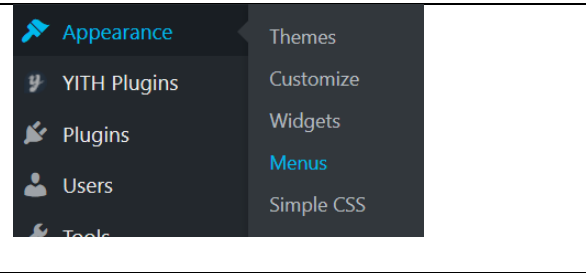
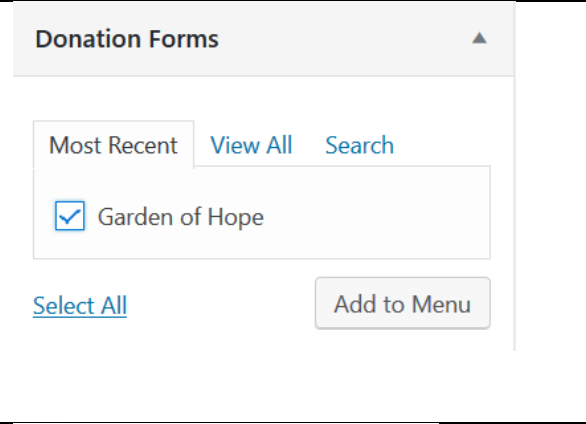
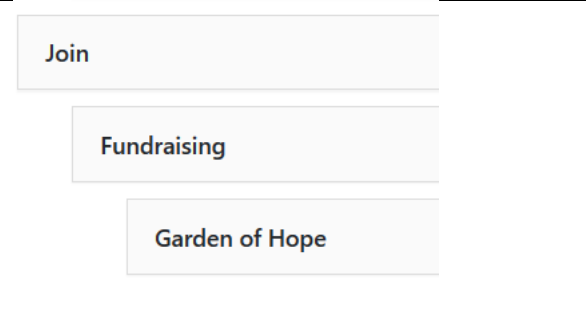

The form content is simply the description of why you are raising funds. You can include links and media in this description if required.

Miscellaneous

The remaining panels should just be left as is

| | |
|--|---|
| <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Post Expirator ▲ </div> <p><input type="checkbox"/> Enable Post Expiration</p> <p>Year Month Day</p> <p>2018 ▼ August ▼ 21</p> <p>Hour(PDT) Minute</p> <p>@ 07 ▼ 38</p> <p>How to expire: Draft ▼</p> | <p>If you wish the donation form to expire after a certain amount of time then you can fill in a future date and time in the Post Expirator section</p> |
|--|---|

| | |
|--|--|
|  | <p>Once you have completed all the necessary information then publish the donation form</p> <p>An example would be “The Shatford Centre Garden of Hope”.</p> |
| | <p>Now that the form has been created. You need to create a page on the site that will display the donation form.</p> <p>Before doing that you need to copy the short code.</p> <p>In a nutshell, a shortcode is a small piece of code, indicated by brackets like [this], that performs a dedicated function on your site. You can place it just about anywhere you’d like, and it will add a specific feature to your page, post, or other content. For example, you can use shortcodes to display galleries, videos, or even playlists.</p> |
|  | <p>Do get the short code of your donation form select Donations / All Forms from the dashboard.</p> |
| <p>Shortcode</p>  | <p>From this list you will see all the donation forms that were created along with their corresponding short code .</p> |
|  | <p>Now you will need to create a page on the site and enter the short code to display.</p> <p>To do this select Page / Add New from the Dashboard.</p> |
| | <p>Enter the title of the Fund Raiser (this will ultimately appear on the menu</p> |

| | |
|---|--|
|  | <p>Paste the short code into the text/ description area of the page</p> |
|  | <p>Publish the page</p> |
|  | <p>We now must have the page appear on the home page menu</p> <p>From the dashboard select Appearance / Menus</p> |
|  | <p>On the left-hand side expand the panel that says "Donation Forms". Select the form you required and press "Add to Menu"</p> |
|  | <p>Once the page has been added to the menu drag it from the bottom of the list and place it under "Fundraising" slightly indented as shown.</p> |
|  | <p>Save the Menu</p> |

| | |
|------------------------------------|--|
| Join ▾ News ▾ OSA Courses ▾ Events | This will place the page (with the donation form) on the main menu under fundraising |
| Fundraising > Garden of Hope | |
| Become a Member | |
| Newsletter | |
| Volunteer | |