

Process Donation User Guide

User Manual



Created: Friday, May 19, 2017

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Help Site

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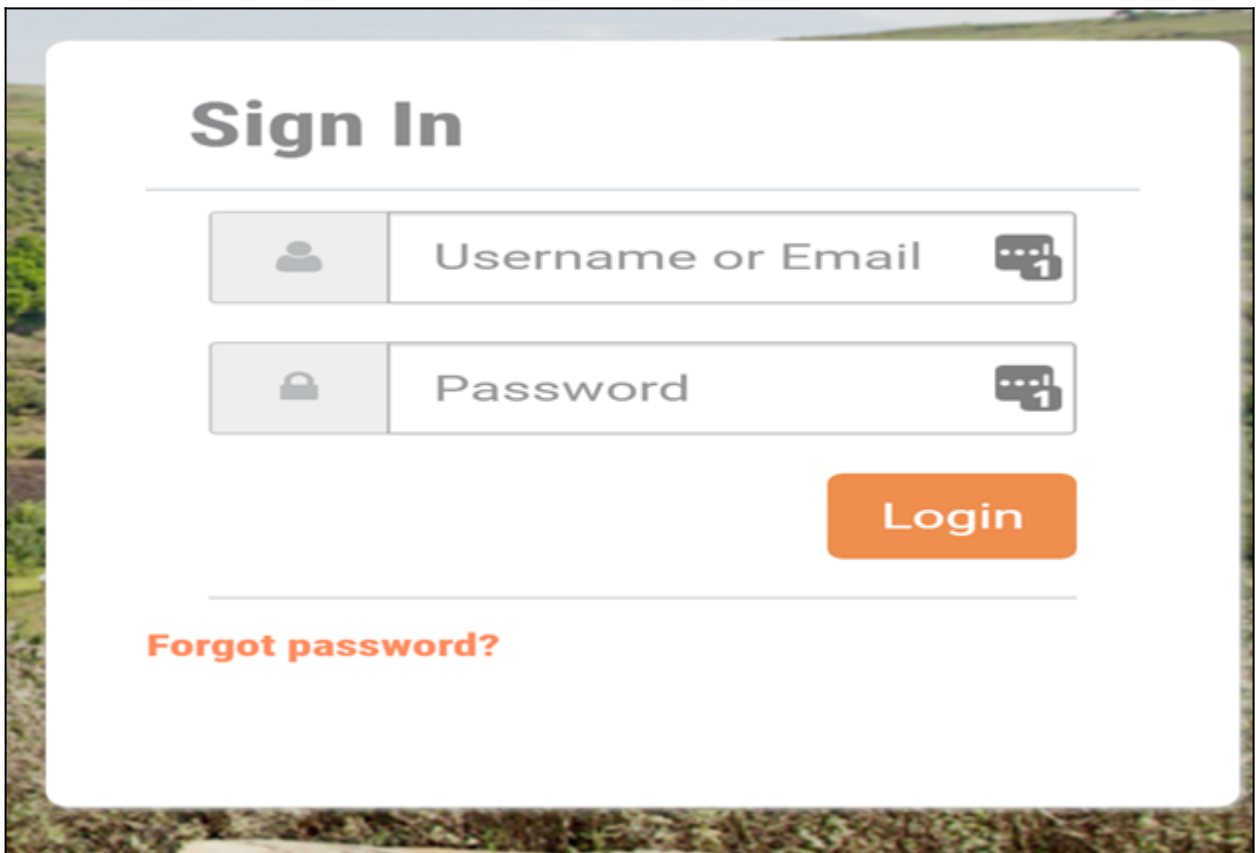
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LOGGING ON

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:



Sign In

Username or Email

Password

Login

[Forgot password?](#)

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.).

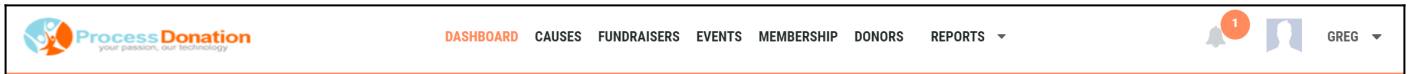
LINK PAYMENTS PAGE

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 & Ultimate)

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)

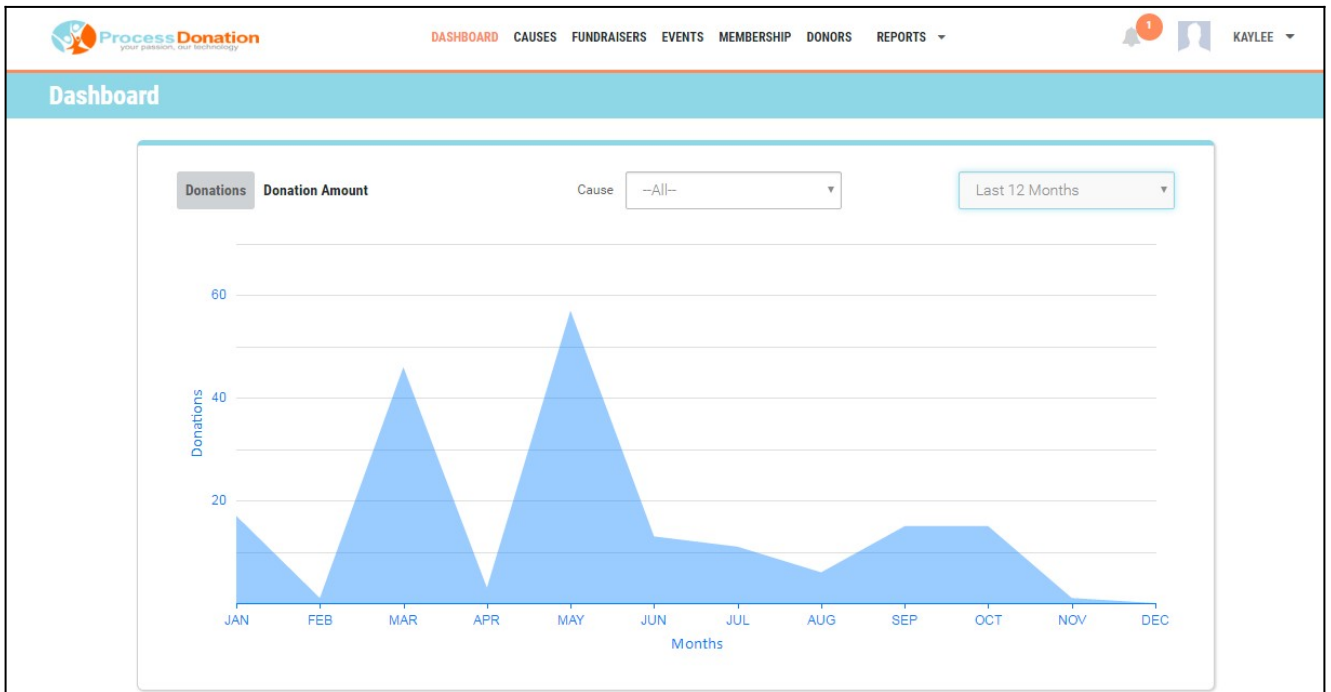
Reports - allows you to track email, manage your IRS letter obligations, and reports on your financial transactions. (Standard & Premium/limited access, Ultimate/full access)

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)

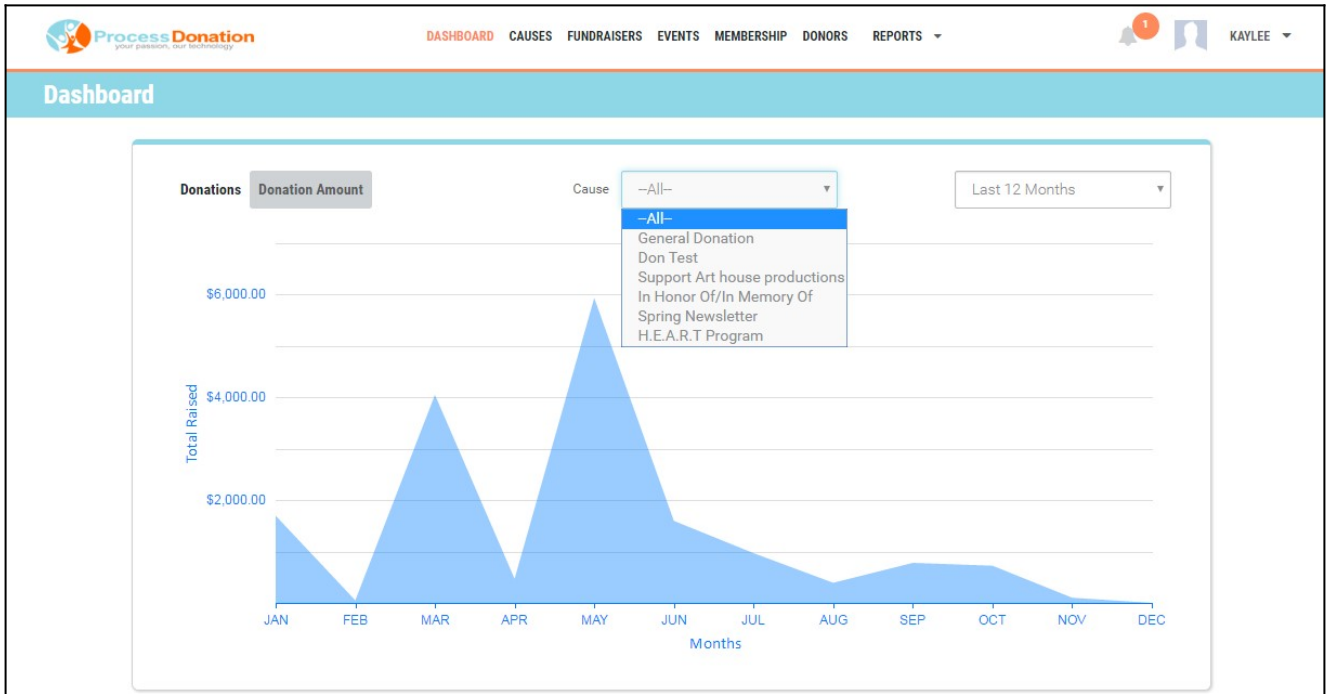
INTRODUCTION TO DASHBOARD

(Standard, Premium, & Ultimate)

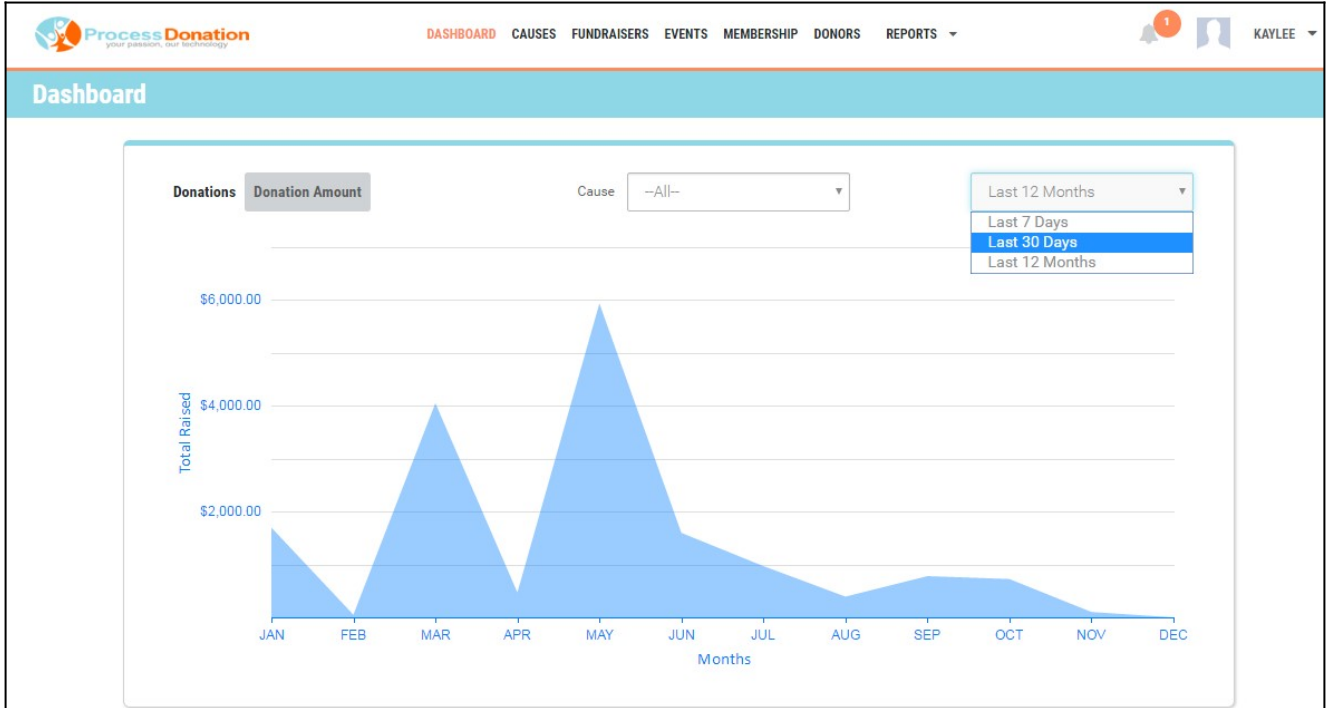
Dashboard is the landing page when you log on and is designed to give you the ability to see a pictorial view of the number of donations and total amount raised.



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:



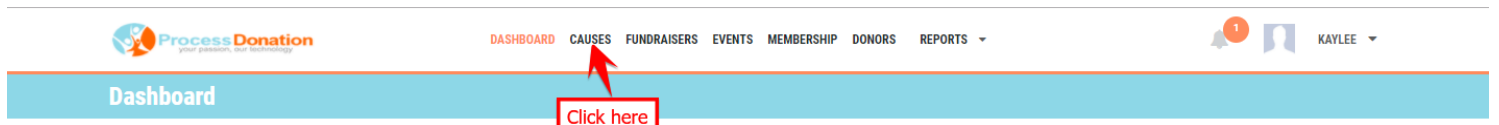
[NEXT: Causes](#)




INTRODUCTION TO CAUSES

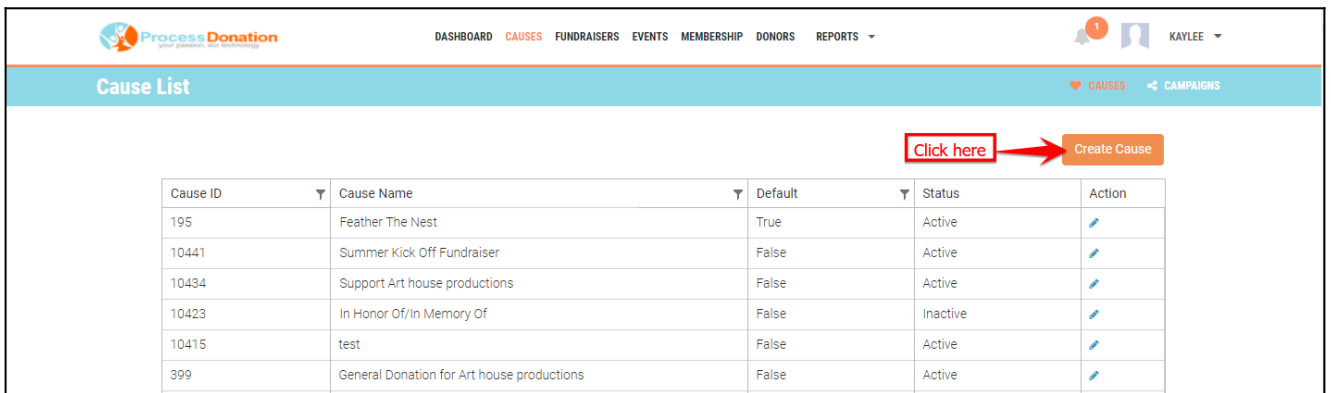
(Standard, Premium, & Ultimate)

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  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.


The screenshot shows the Process Donation dashboard. At the top, there is a navigation bar with the following items: DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. On the right side of the navigation bar, there is a user profile for KAYLEE. Below the navigation bar is a header for the 'Cause List' page. In the top right corner of this header, there are two buttons: 'CAUSES' and 'CAMPAIGNS'. Below the header is a table with the following columns: Cause ID, Cause Name, Default, Status, and Action. The table contains six rows of data. To the right of the table, there is a red box with the text 'Click here' and a red arrow pointing to an orange 'Create Cause' button.

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.

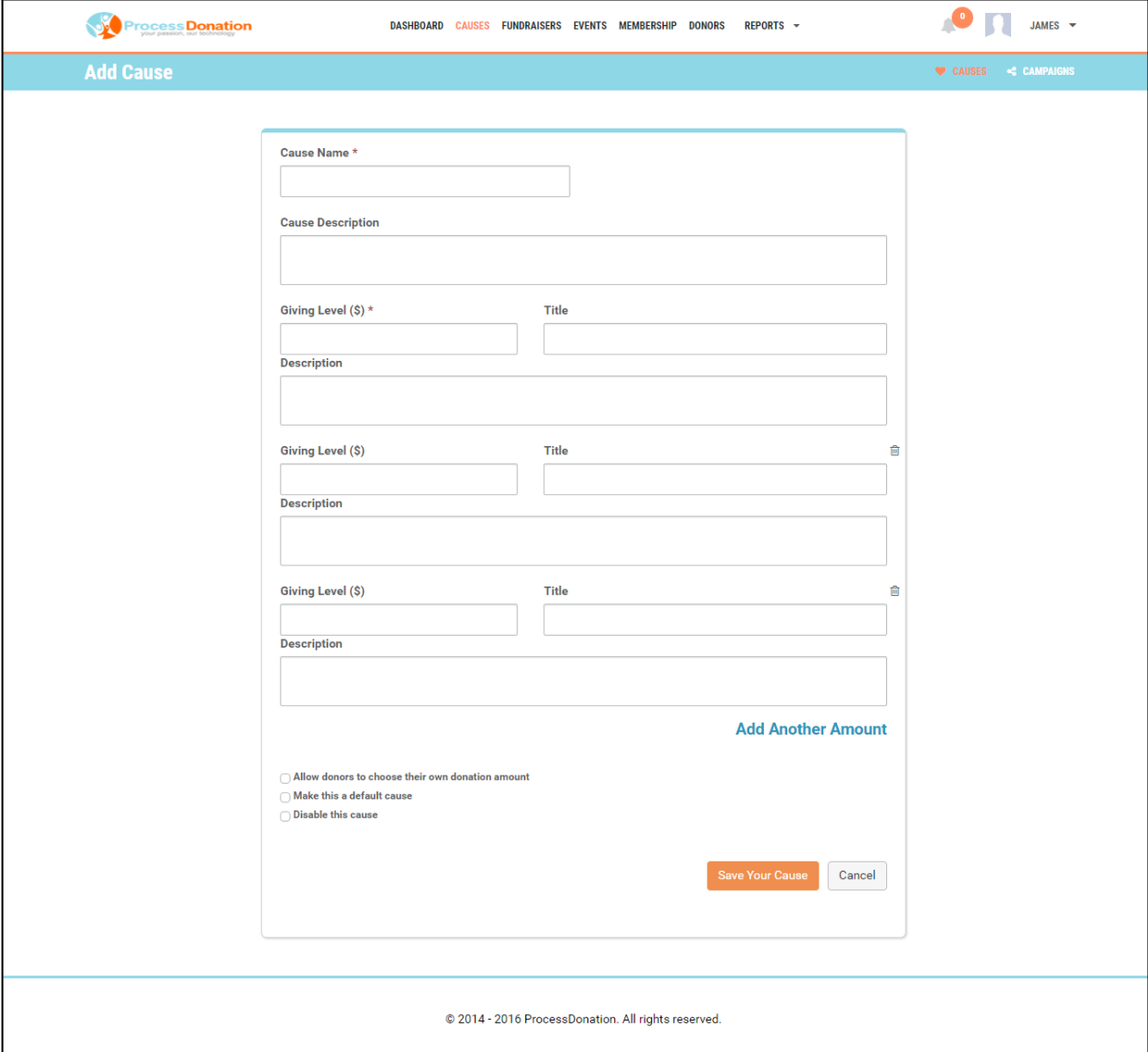
Additionally, you have the following options that you can manage at the Cause level (all Causes do not have to be treated the same):

[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  button.




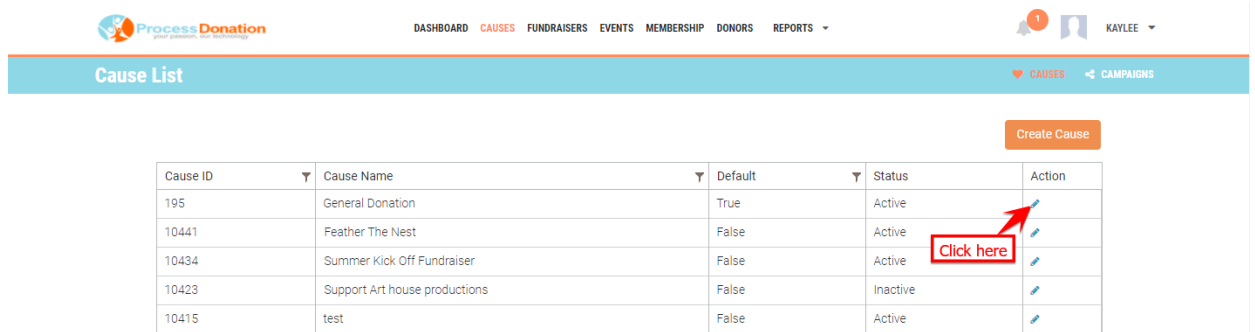
The screenshot shows the 'Add Cause' form in the Process Donation dashboard. The form is titled 'Add Cause' and is located in the top navigation bar. The form contains the following fields and options:

- Cause Name ***: A text input field.
- Cause Description**: A large text area for the main description.
- Giving Level (\$) ***: A text input field for the minimum donation amount.
- Title**: A text input field for the title of the giving level.
- Description**: A text area for the description of the giving level.
- Give Now**: A button to add the giving level.
- Remove**: A trash icon to remove the giving level.
- Repeatable**: A checkbox to allow donors to choose their own donation amount.
- Make this a default cause**: A checkbox to make this cause the default.
- Disable this cause**: A checkbox to disable the cause.
- Save Your Cause**: An orange button to save the cause.
- Cancel**: A button to cancel the form.

At the bottom of the form, there is a link that says 'Add Another Amount'.






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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.



Cause List

[Create Cause](#)

Cause ID	Cause Name	Default	Status	Action
195	General Donation	True	Active	
10441	Feather The Nest	False	Active	 Click here
10434	Summer Kick Off Fundraiser	False	Active	
10423	Support Art house productions	False	Inactive	
10415	test	False	Active	

[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  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:

The screenshot shows the 'Email' campaign creation page in the Process Donation system. The page has a navigation bar at the top with 'DASHBOARD', 'CAUSES', 'FUNDRAISERS', 'EVENTS', 'MEMBERSHIP', 'DONORS', and 'REPORTS'. The user is logged in as 'KAYLEE'. The main heading is 'Campaigns', and the sub-heading is 'Email'. There are tabs for 'Email', 'Facebook', and 'Twitter'. The 'Email' tab is active, showing a 'Compose' form. On the left, there is a sidebar with options: 'New Email', 'Sent Emails (12)', 'Customized (0)', and 'Upload CSV'. The 'Compose' form includes fields for 'Campaign Name *', 'Cause *' (a dropdown menu), 'Subject *', and 'Recipients *' (with a 'Choose Recipients' button). Below these is a rich text editor for the 'Body *' with a toolbar and a pre-filled template text. A 'Send Email' button is located at the bottom right of the form.


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.

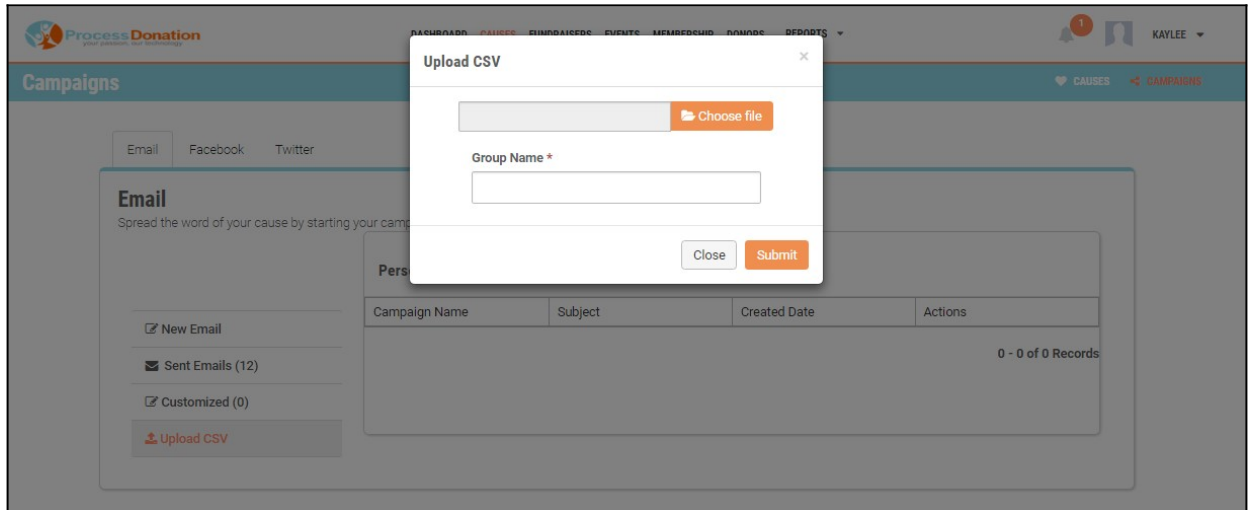
 When you click on  your message will be delivered to your Recipients.


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.

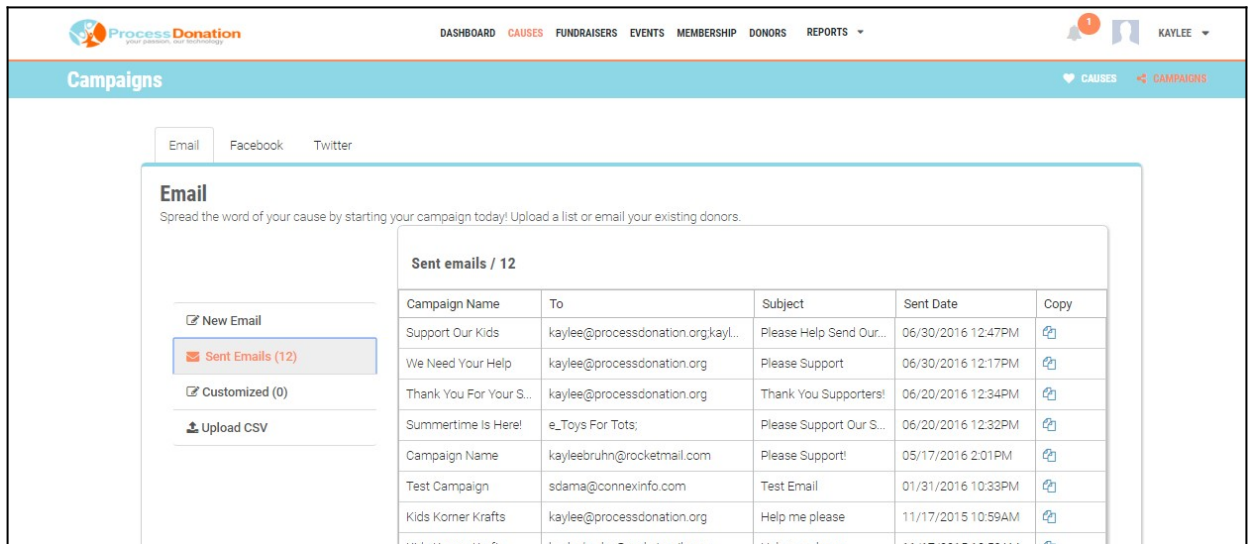
Recipients - You may enter in any email address and separate out multiple email addresses by a comma. Or you can import Recipients via our Upload CSV  file feature; when you click on Upload CSV a pop-up box (*see below and please make sure your web browser is set to enable pop-ups from Process Donation*),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




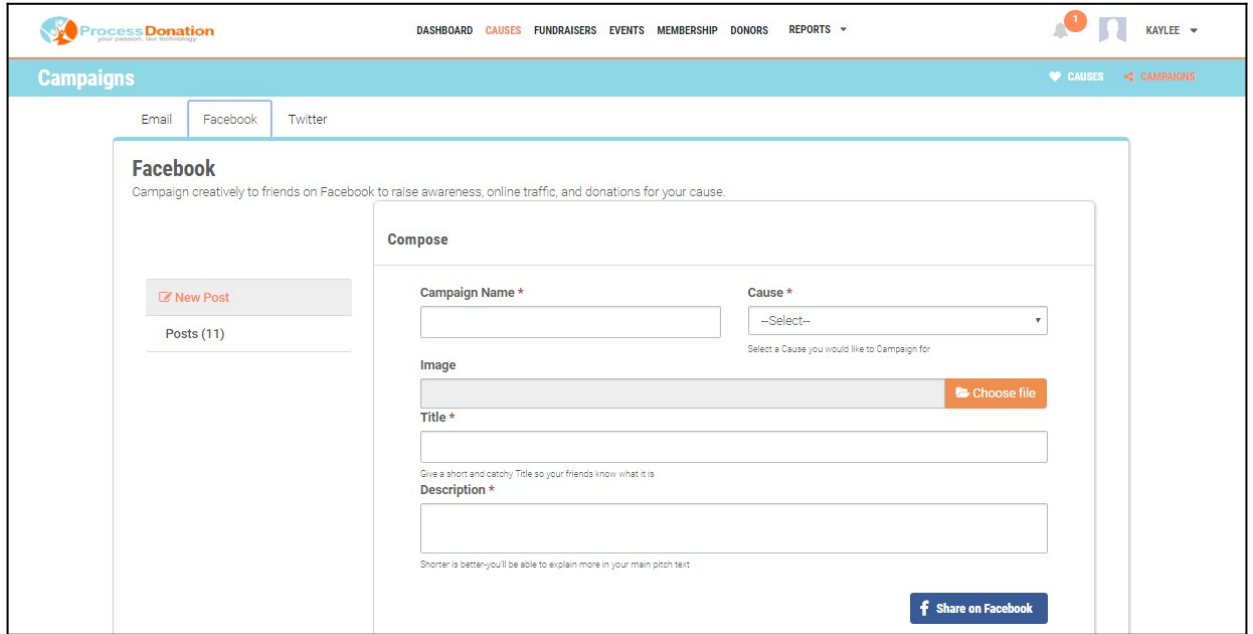
Keep a log of when you sent your Campaign emails and copy  a previously used Campaign email for easy and quick editing to generate a new outreach effort. This will take you to a screen to edit your copied email (see above).



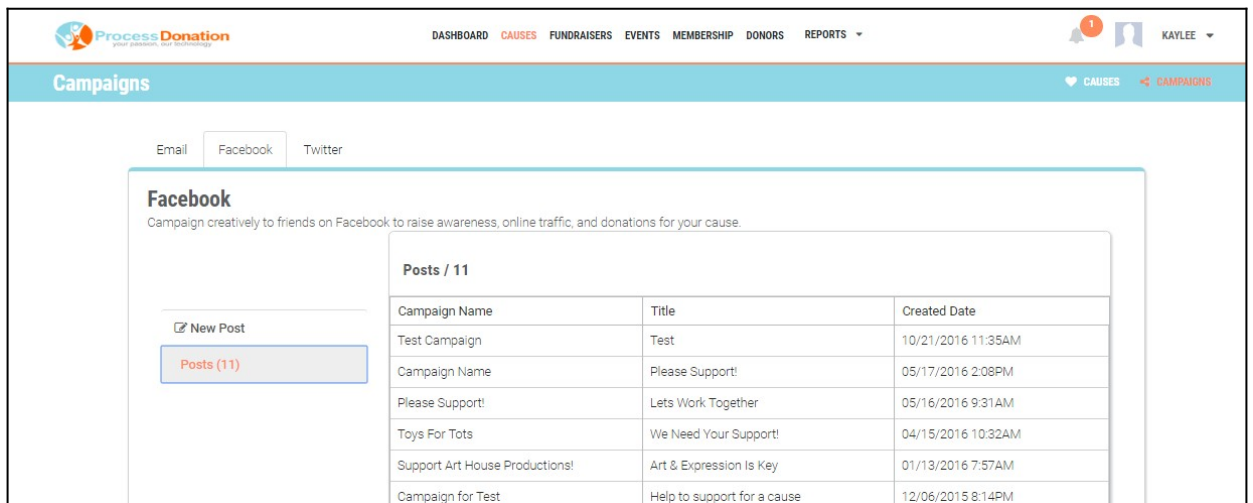
Facebook

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.



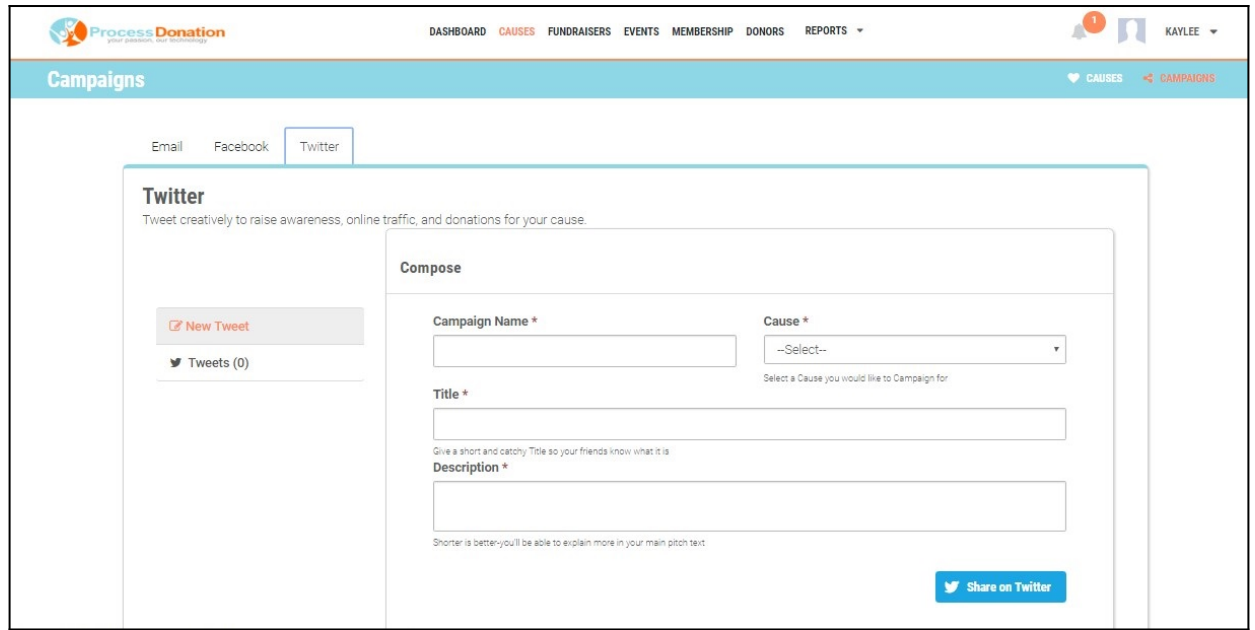
This section simply tracks the Facebook posts you have made through the Process Donation portal to make it easier to locate your previous posts through all of your normal and other Facebook activity.



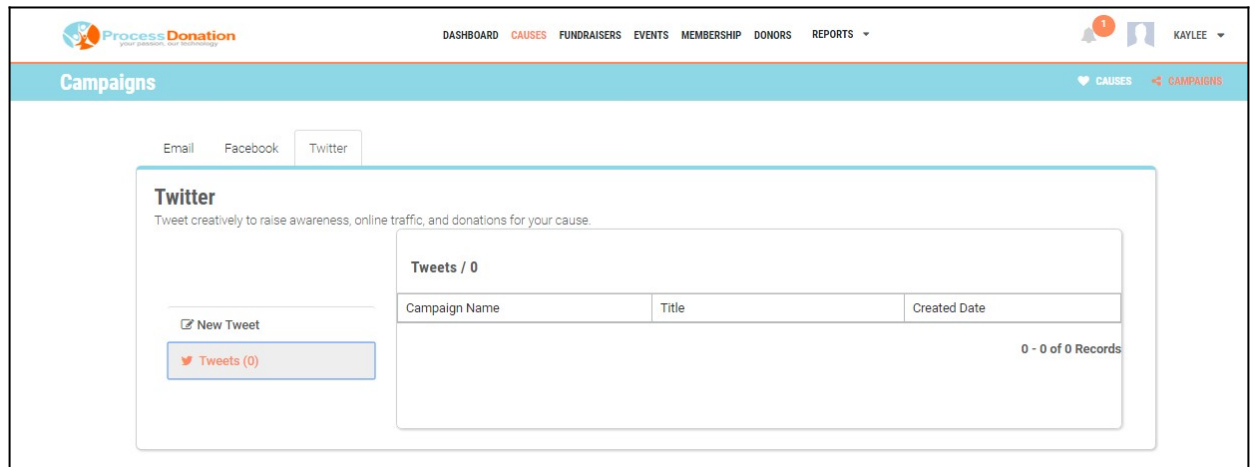
Twitter

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.

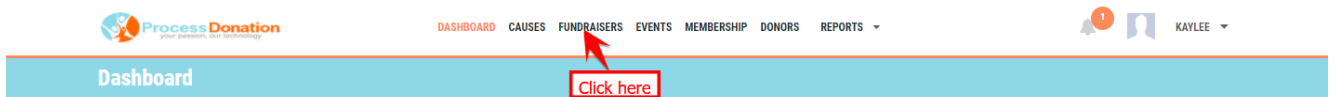
Process Donation will provide a URL to the donation page created and this unique URL will be used by you to link it to your website under a DONATE button or similar link.

[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.

The screenshot shows the 'Fundraisers' dashboard in the Process Donation system. The dashboard includes a navigation menu with options like DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. The main content area displays a table of fundraiser records with columns for First Name, Last Name, Email, Cause Name, Status, Goal Amount, Amount Raised, and Action. Below the table, it indicates '1 - 15 of 15 Records'.

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	kayleanna1@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


1 - 15 of 15 Records

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.

ART HOUSE
VISUAL • PERFORMING ARTS | JERSEY CITY | EST. 2001

Share Tweet Donate Now

Empower Our Youth



\$3,450 of \$1,500

Organizer
Marcus Reed **0** Days Left

Imagine spending a week in a community where everyone is actively supporting you to be your most creative; whe..Read More >>

DONATE NOW

Share On Facebook

Share via Email

4 Shares

Update #1 11 months ago

We hope you'll work with us toward our vision—a world in which all young people are seen, heard, and appreciated for the value they bring to their communities, giving them the confidence and inner motivation to pursue meaningful life paths as leaders and change-makers.

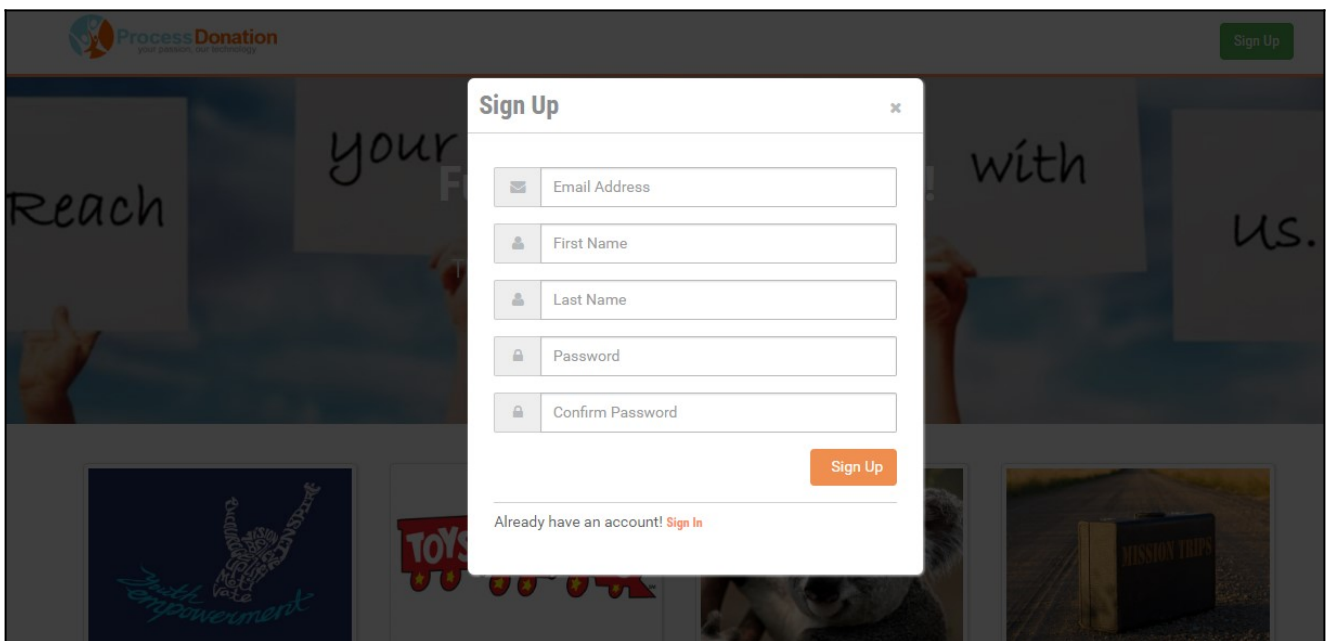
Teams View All


- Summer Art Program \$0 / \$1,500 **Join**
- Voices of Change \$1,565 / \$2,000 **Join**

NEXT: INVITE FUNDRAISERS

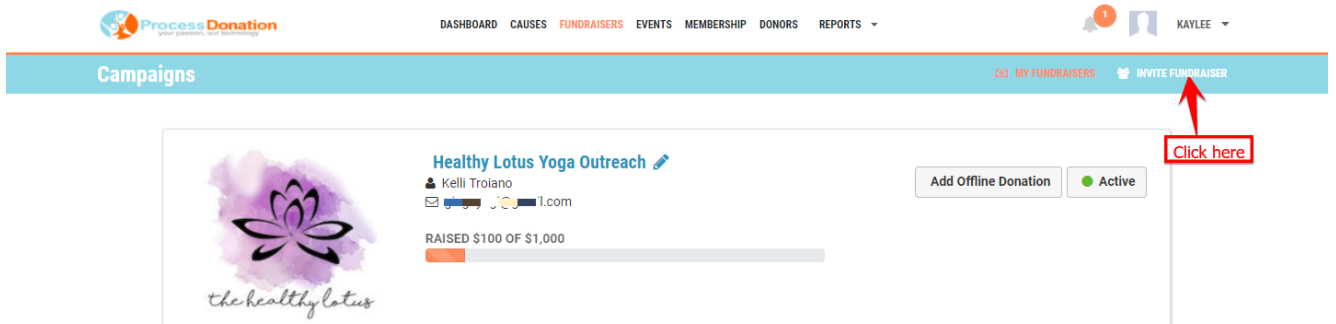
INVITE FUNDRAISERS

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 Squadron
CALIFORNIA WING CIVIL AIR PATROL
Auxiliary of the United States Air Force
Post Office Box 1434, Modesto CA 95301
Modesto Airport, 700 Tioga Drive
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
FUNDRAISER PAGE**](#)

[**NEXT: CREATE A**](#)

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.

The screenshot shows the 'CREATE CAMPAIGN' form in the Process Donation system. The form is titled 'Hi Steve, Enter your Goal, Title' and includes the following fields and options:

- Cause ***: A dropdown menu with 'Choose Cause' selected.
- Campaign Title ***: A text input field.
- Goal Amount ***: A text input field with a '\$' symbol.
- End Date ***: A date picker field.
- Zip / Postal code ***: A text input field with 'City:' and 'State:' sub-fields below it.
- Pick Your Theme**: A row of ten color swatches (green, blue, orange, red, purple, light blue, light green, yellow, pink, brown, grey).
- Save & Continue**: An orange button at the bottom right.

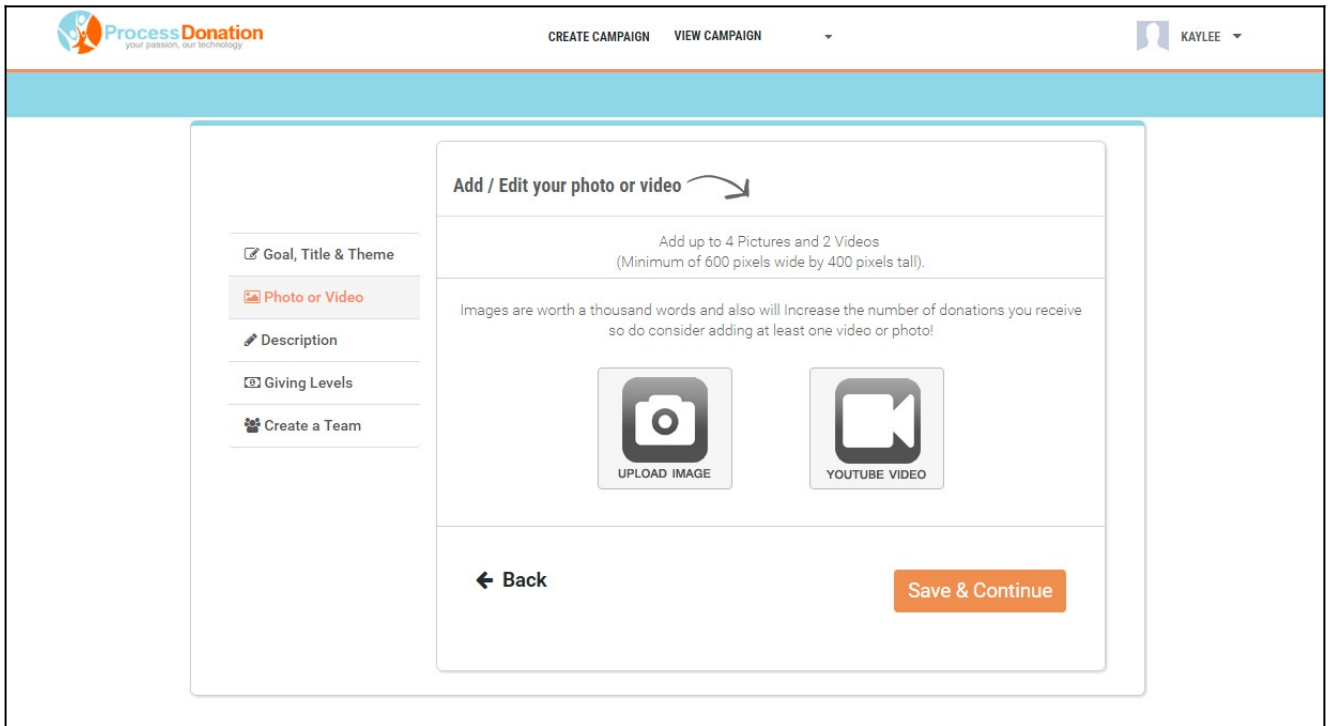
1. **Cause** - They can choose from any one Cause that you invited them to assist you in raising awareness and funds.
2. **Campaign Title** - A title for the Fundraiser page
3. **Goal Amount** - The Fundraiser sets a goal amount that they are seeking to raise on your behalf
4. **End Date** - Set the 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

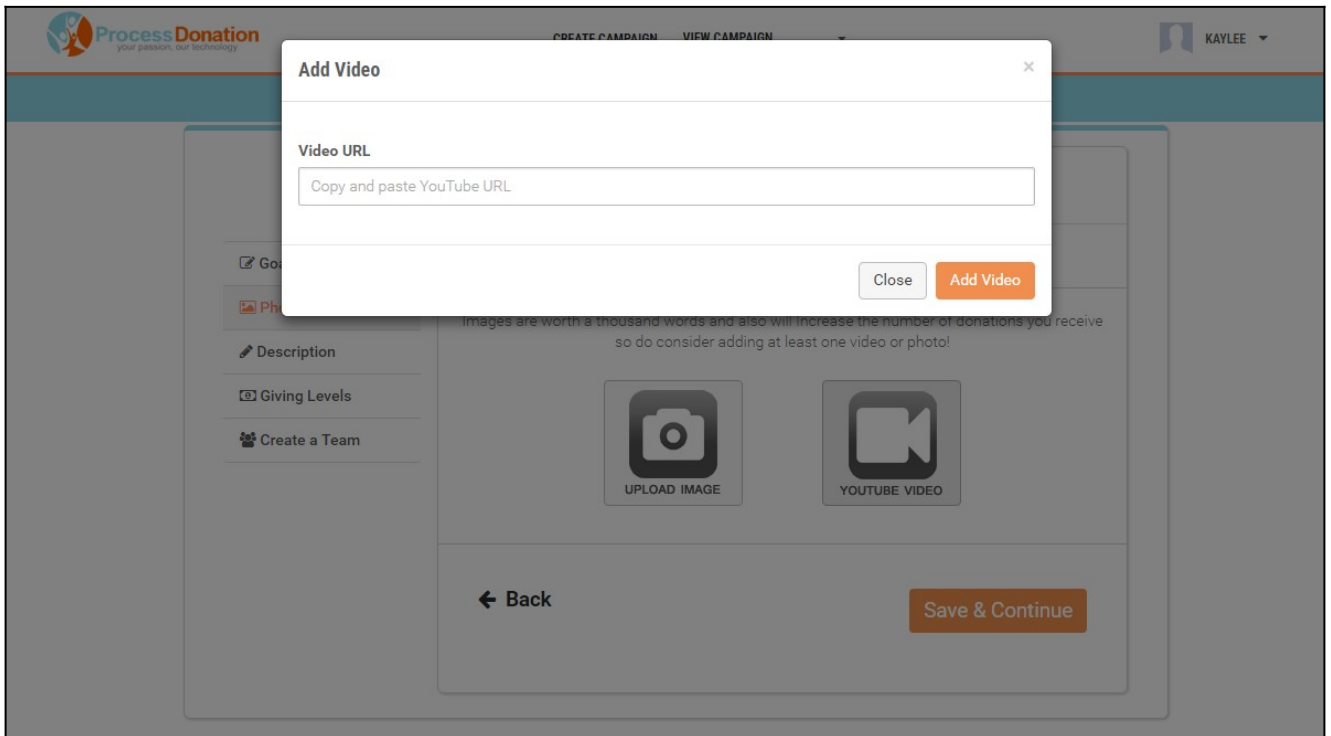
[PREVIOUS: CREATE A FUNDRAISER PAGE](#)

[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

The screenshot displays the 'Tell your story' section of the fundraiser creation process. On the left, a sidebar lists several steps: 'Goal, Title & Theme', 'Photo or Video', 'Description' (which is currently selected and highlighted in red), 'Giving Levels', and 'Create a Team'. The main content area is titled 'Tell your story' and features a text editor with a toolbar containing 'Bold', 'Italic', 'Under line', and 'Link' options. Below the toolbar is a large text input field. Underneath the text field is a section titled 'Customize Your URL (Optional)' with a URL input field containing the text 'http://fundraiser.helpadesi.com/Fundraiser/'. Below the URL field is a checkbox labeled 'Set "Monthly Recurring" as the default giving option'. At the bottom of the main content area, there are two buttons: a 'Back' button with a left-pointing arrow and a 'Save & Continue' button in orange.

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](#)

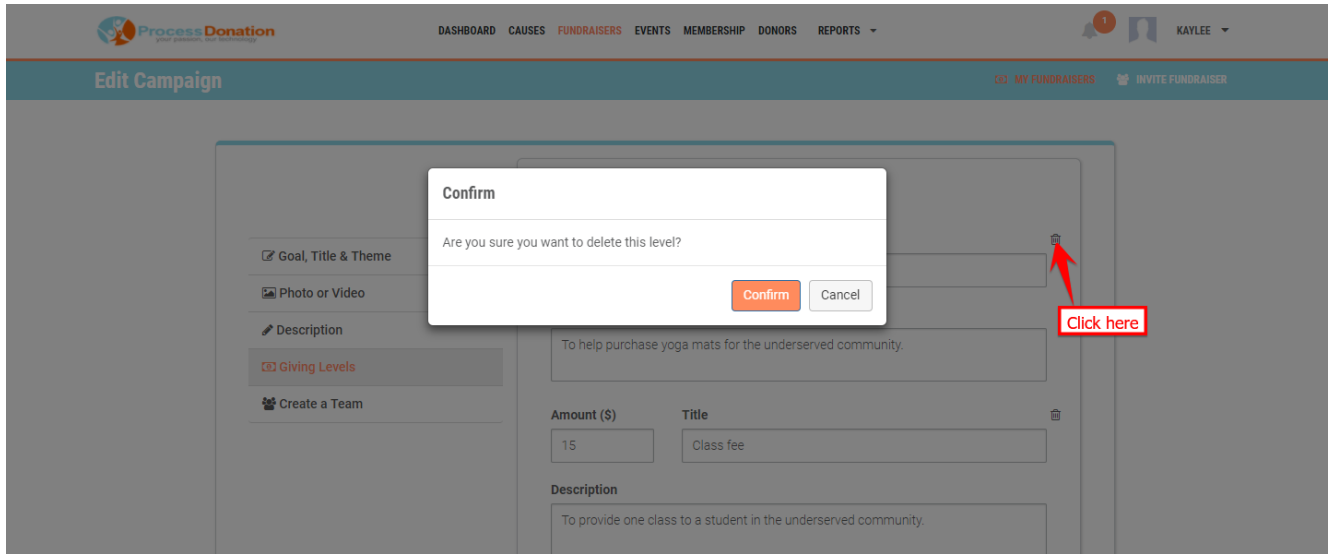
SETUP GIVING LEVELS

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.

The screenshot shows the 'Giving Levels' configuration page. At the top, there is a navigation bar with the Process Donation logo, 'CREATE CAMPAIGN', 'VIEW CAMPAIGN', and a user profile for 'KAYLEE'. A sidebar on the left contains menu items: 'Goal, Title & Theme', 'Photo or Video', 'Description', 'Giving Levels' (highlighted), and 'Create a Team'. The main content area is titled 'Giving Levels' and contains three identical form sections. Each section has an 'Amount (\$)' input field (with values 2, 3, and 4), a 'Title' input field, and a 'Description' text area. Below the forms, there is a blue link 'Add Another Giving Level', a checkbox 'Allow donors to choose their own donation amount', a 'Back' button, and a 'Save & Continue' button.

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

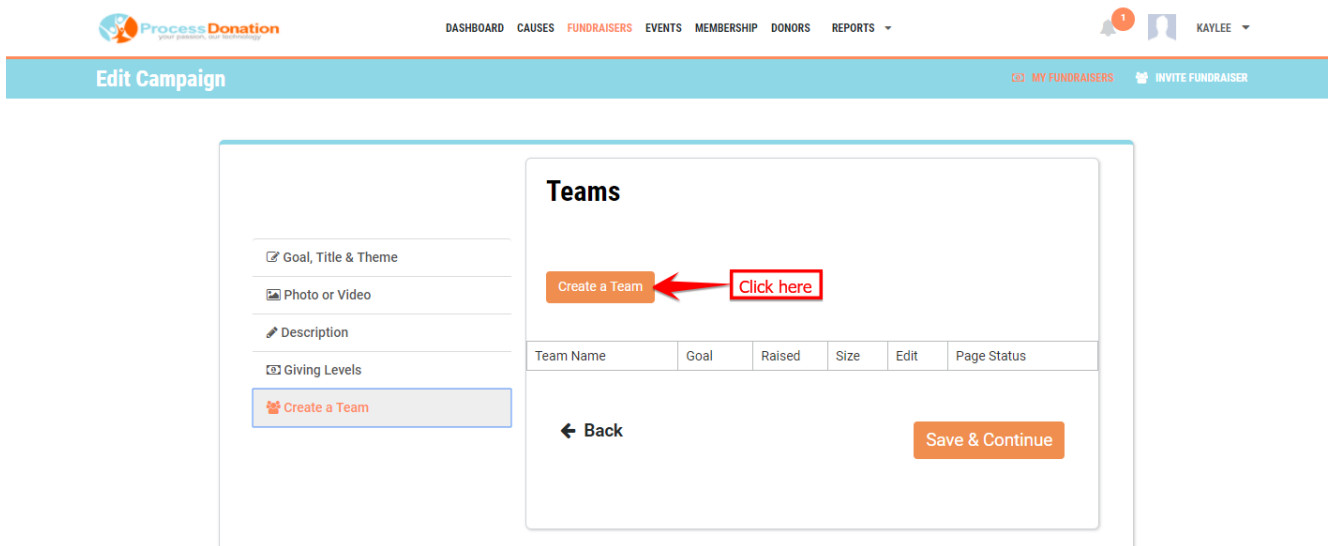
Save & Continue to proceed to creating fundraiser page

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

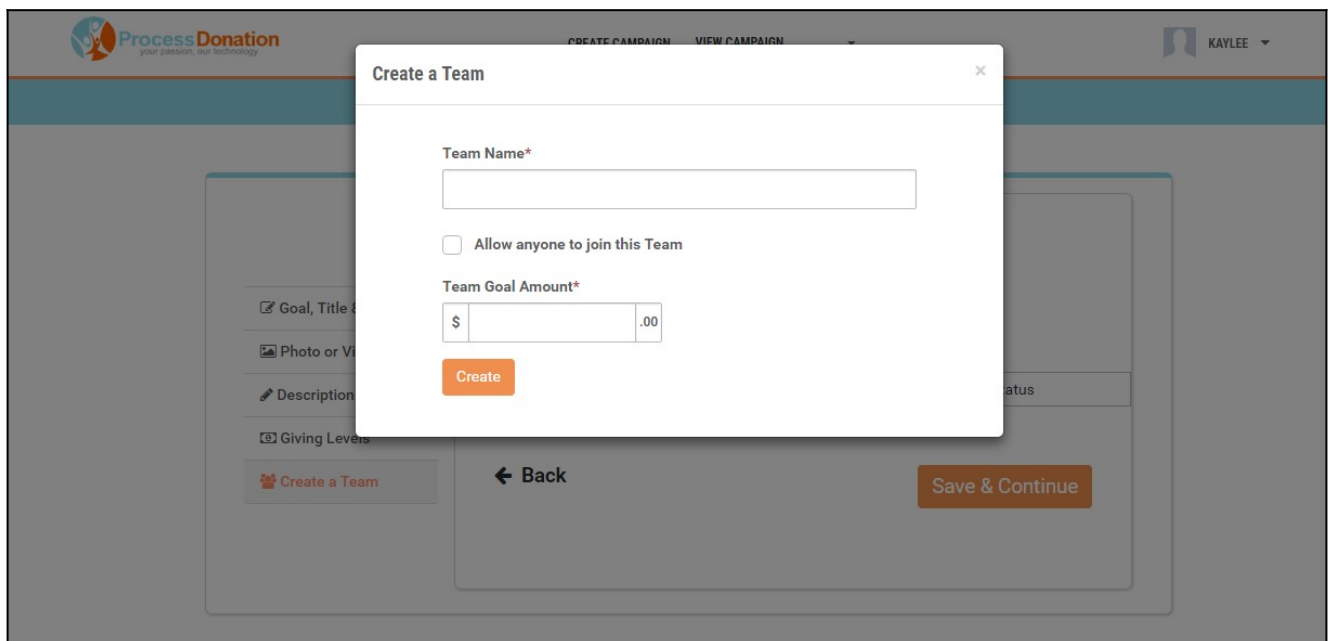
[**NEXT:**](#)

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.

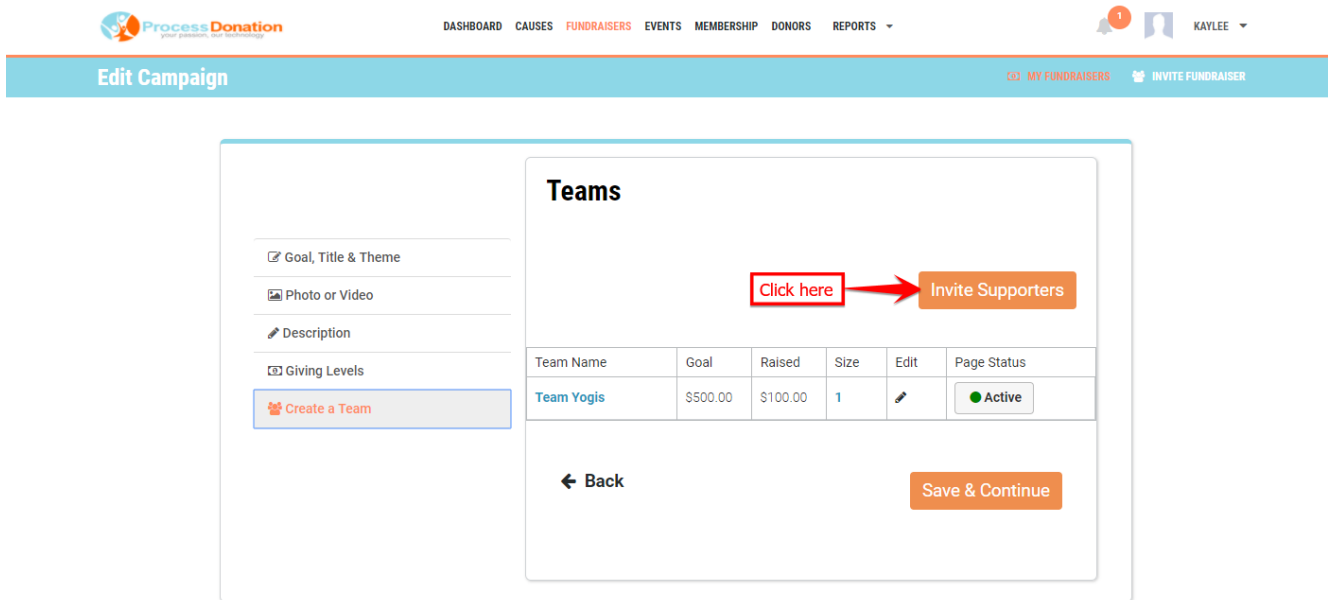


Team Name - Your Fundraiser can further personalize their efforts by giving their new

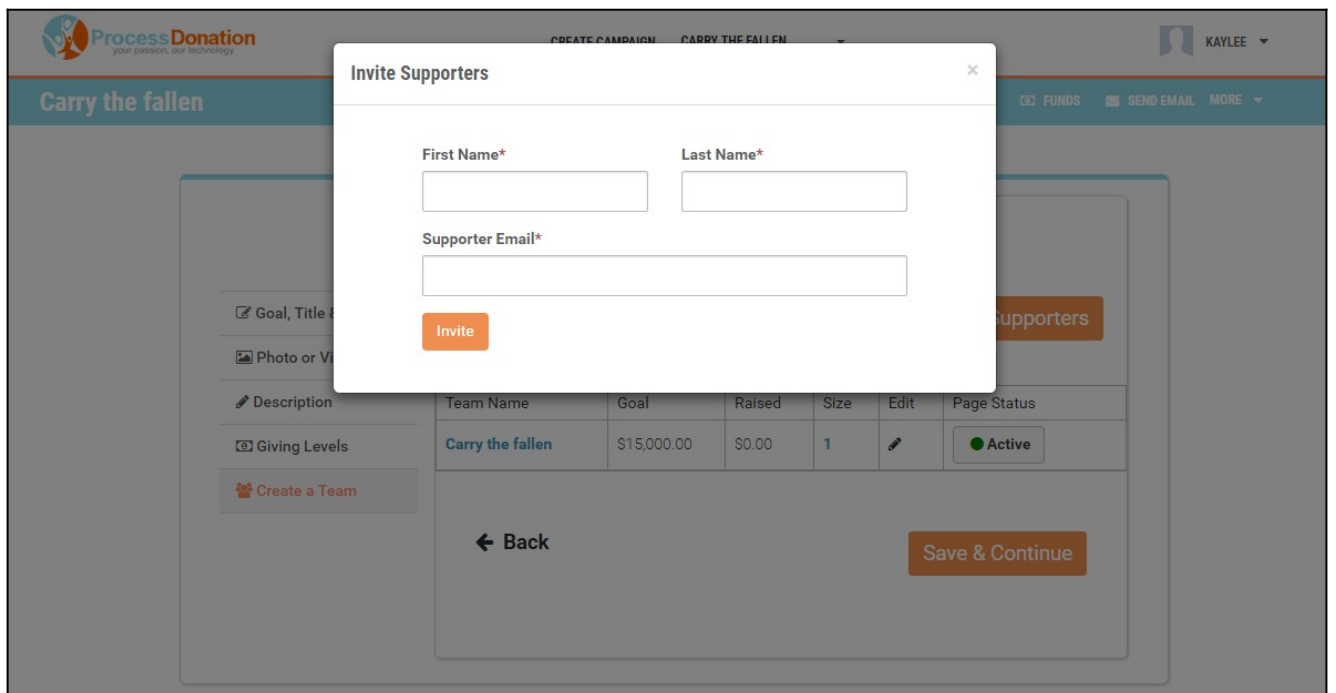
team a name

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

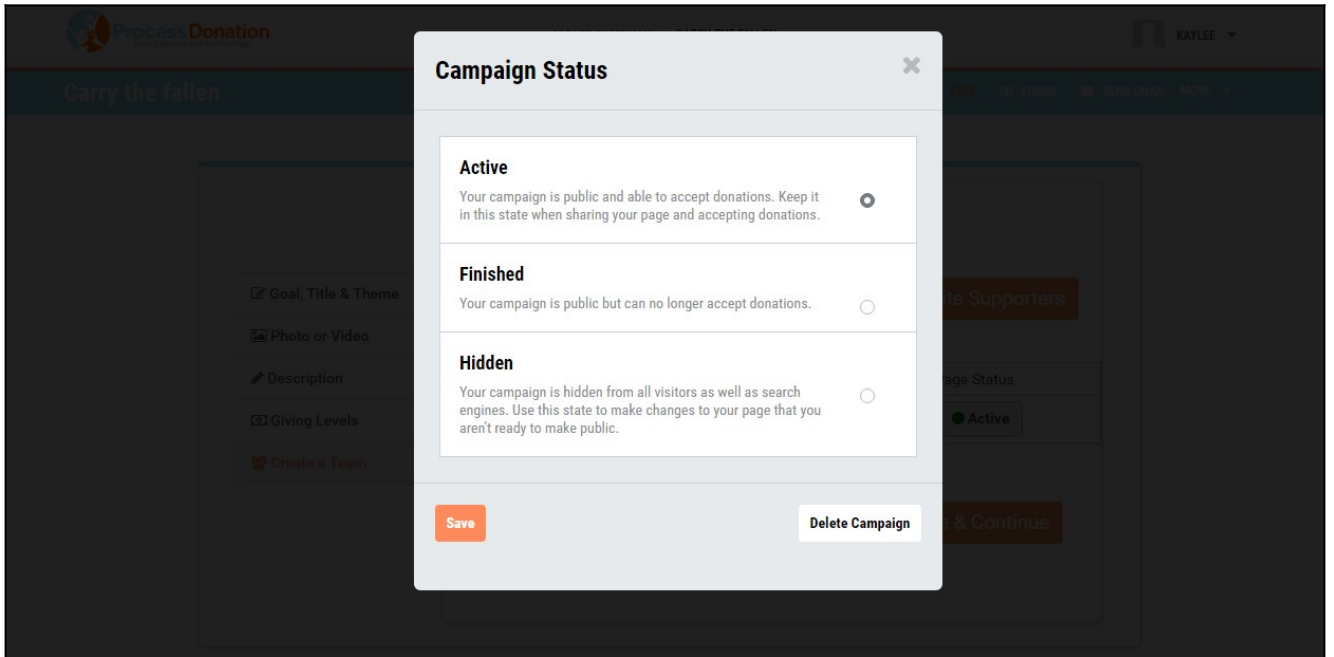
Team Goal Amount - Your Fundraiser can set any goal amount for the Team to make it competitive



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**](#)

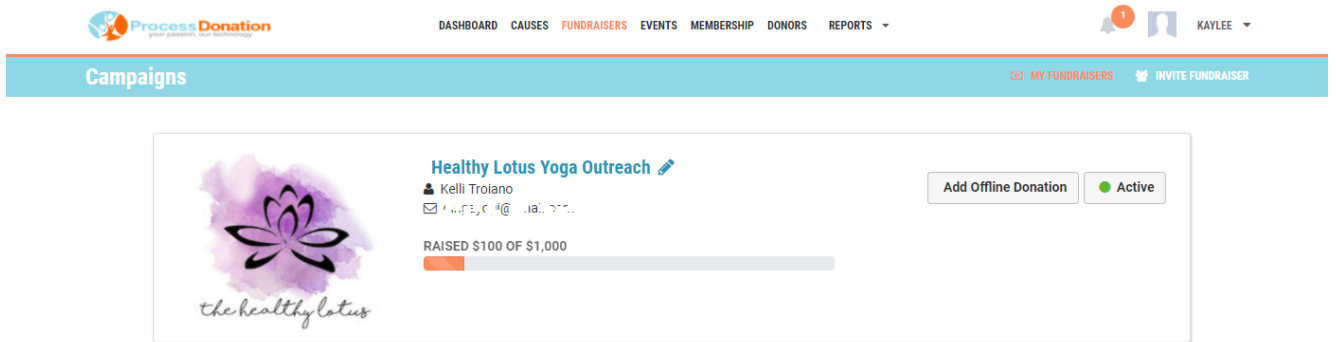
MANAGE FUNDRAISER PAGE

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.

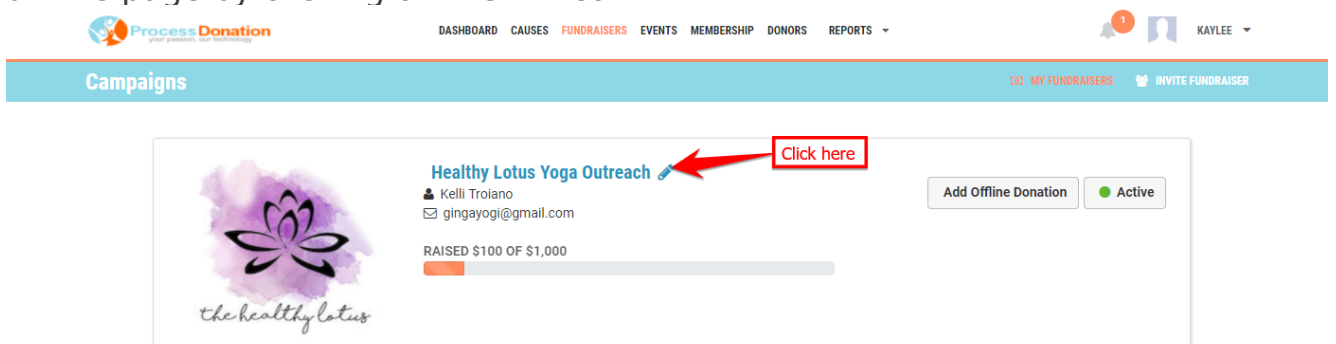
The screenshot shows the 'Fundraisers' management interface. At the top, there is a navigation bar with the Process Donation logo and menu items: DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. On the right, there is a user profile for 'KAYLEE' with a notification badge. Below the navigation bar, there is a header for 'Fundraisers' with two buttons: 'MY FUNDRAISERS' and 'INVITE FUNDRAISER'. The main content is a table with the following data:

First Name	Last Name	Email	Cause Name	Status	Goal Amount	Amount Raised	Action
Kelli	Troiano	g...@gmail.com	Healthy Lotus Yo...	Accepted	\$1,000.00	\$100.00	Manage
Kaylee	Bruhn	...@gml.com	General Donation...	Accepted	\$1,500.00	\$0.00	Manage
Kaylee	Bruhn	kt...@gmail.co...	General Donation	Accepted	\$15,000.00	\$0.00	Manage
Kaylee	Bruhn	kt...@gmail.com	Support Art hous...	Accepted	\$1,500.00	\$12.00	Manage
Prasad	Papudesi	pr...@processd...	General Donation	Accepted	\$500.00	\$0.00	Manage
Marcus	Reed	marcus...@yaho...	Summer Kick Off...	Accepted	\$650.00	\$300.00	Manage
Marcus	Reed	mar...@yaho...	Spring Newsletter	Accepted	\$5,000.00	\$0.00	Manage
Marcus	Reed	marc...@yaho...	H.E.A.R.T Program	Accepted	\$1,500.00	\$3,450.00	Manage
Sarah	Papudesi	sar...@yaho...	H.E.A.R.T Program	Accepted	\$1,000.00	\$50.00	Manage
Max	Klinedell	m...@yaho.c...	H.E.A.R.T Program	Accepted	\$1,100.00	\$0.00	Manage
Dave	Tissler	d...@yahoo.com	H.E.A.R.T Program	Accepted	\$200.00	\$0.00	Manage
Patrick	Fennel	pa...@yaho.c...	In Honor Of/In M...	Accepted	\$400.00	\$820.00	Manage
Layla	Davis	layla...@yaho.c...	In Honor Of/In M...	Accepted	\$1,000.00	\$1,735.00	Manage

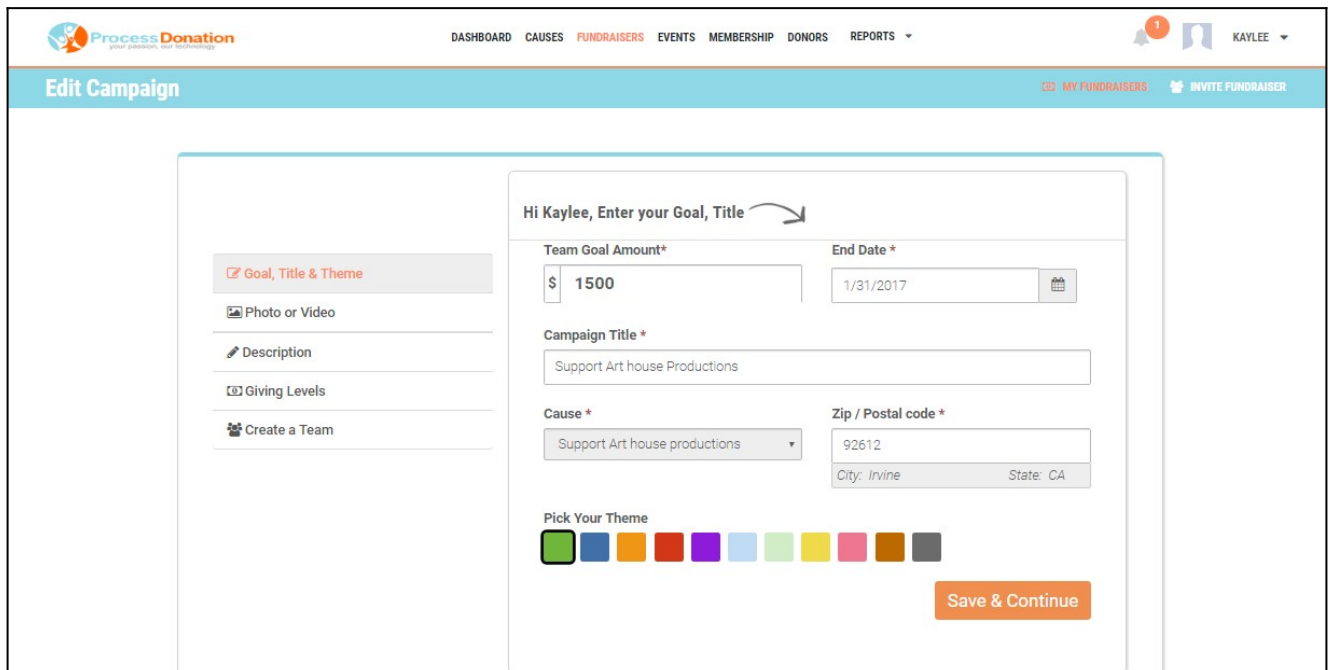
Once you have clicked MANAGE next to the Fundraiser's name, the system takes you to the following screen for further action:



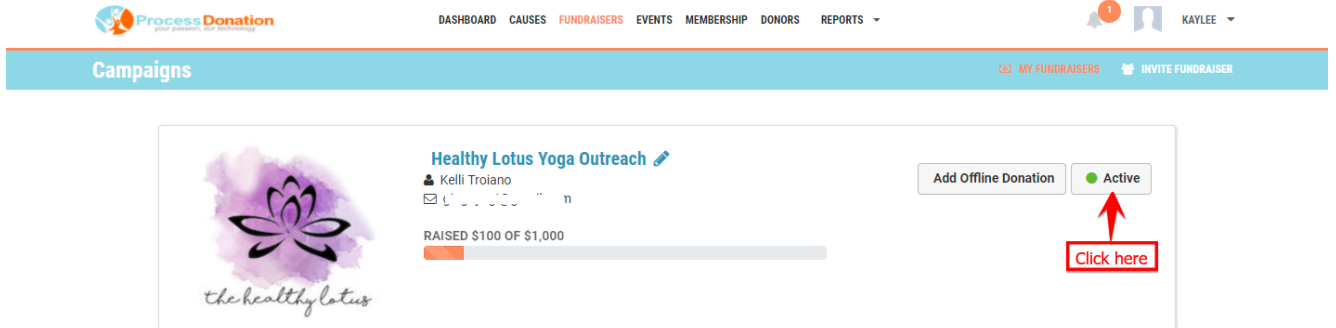
You can edit the page by clicking on the  icon.



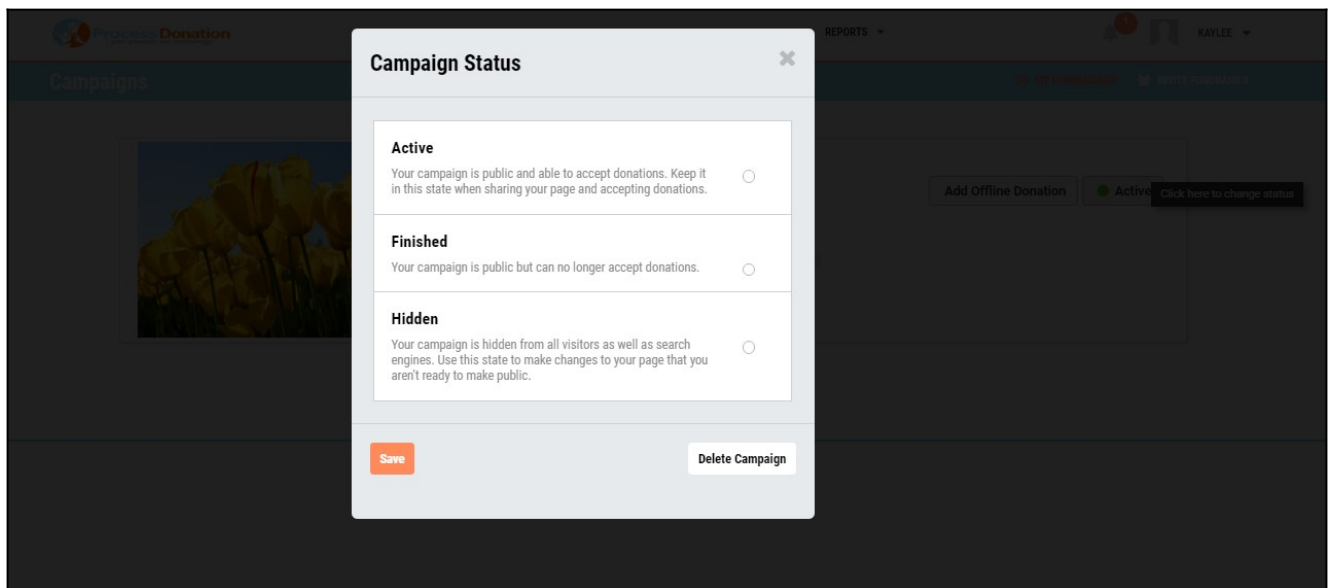
And you will be redirected to the page where you can edit the information, the flow will be similar to creating a new Fundraiser page.



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.

The screenshot shows the 'Add Offline Donation' form. The form is a modal window with a white background and a grey border. It contains several input fields: 'Members*' (a dropdown menu with '-- Select --'), 'Amount*' (a text box with a '\$' symbol), 'Payment Type' (a dropdown menu with 'Cash'), 'First Name*', 'Last Name*', 'Date' (with a calendar icon), 'Address', 'Check/Ref#' (with a text box), 'Postal / Zip' (with 'City:' and 'State:' sub-labels), 'Phone', 'Email' (with a lock icon), and a 'Comments' text area. There is a 'Save' button at the bottom right. The background shows a blurred view of the website's 'Campaigns' section with a yellow tulip image and navigation tabs like 'DASHBOARD', 'CAUSES', 'FUNDRAISERS', etc.

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
TO DESIGN A CUSTOM EVENTS PAGE?](#)**

[NEXT: HOW](#)

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.

Process Donation your passion, our technology

DASHBOARD CAUSES FUNDRAISERS **EVENTS** MEMBERSHIP DONORS REPORTS

KAYLEE

Events List

EVENTS

Click here → Create Event

Event Name	Starts On	Tickets Sold	Status	Actions
Spring Fundraising Event	05/06/2017 10:00 AM	0/100	Ongoing	Manage Promo Codes Deactivate
Benefit Concert Ed Shereen	05/30/2017 5:00 PM	2/60	Upcoming	Manage Promo Codes Deactivate
Annual Fundraising Event	03/03/2017 12:00 AM	0/250	Deactivated	Manage Promo Codes Activate
Cocktails Under The Stars	03/02/2017 12:00 AM	0/100	Deactivated	Manage Promo Codes Activate

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

Process Donation your passion, our technology

DASHBOARD CAUSES FUNDRAISERS **EVENTS** MEMBERSHIP DONORS REPORTS

Create Event

Go back to Events

Event Details

Tickets

Buyer Information

Event Title *

Event Description *

Starts On * Ends On *

12:00 AM

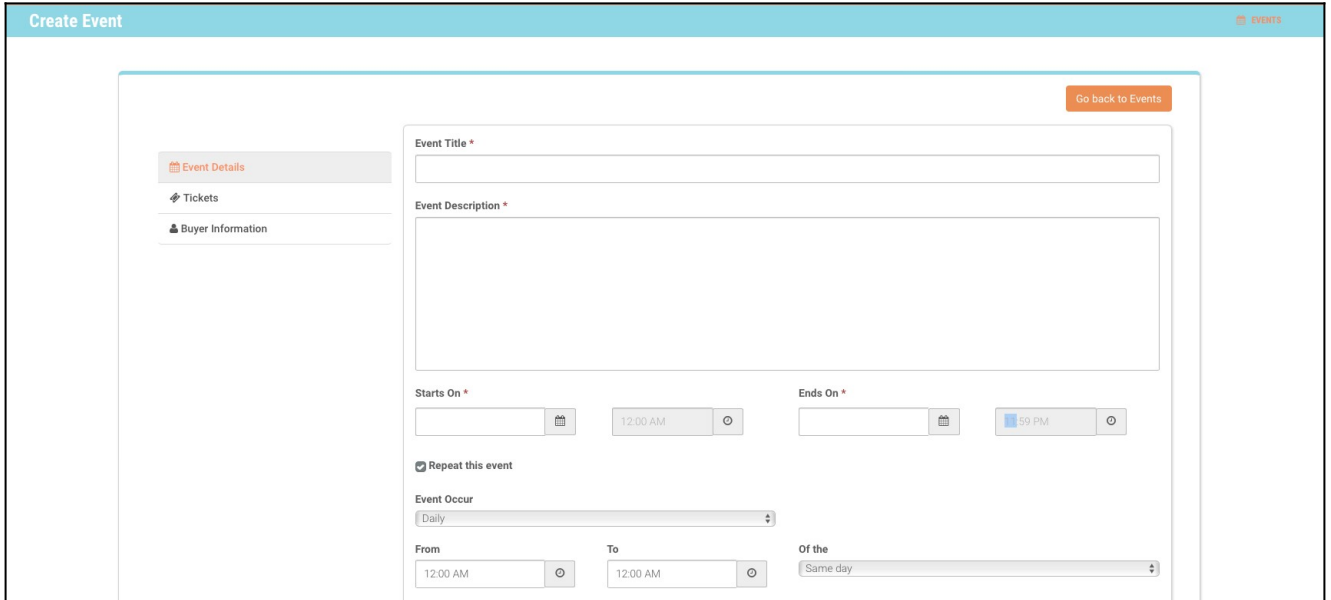
In order to create an Event, you will have to

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.



The screenshot shows a web interface for creating an event. At the top, there is a teal header with the text "Create Event" on the left and "events" on the right. Below the header is a main content area with a light blue border. On the left side of this area is a vertical sidebar with three menu items: "Event Details" (highlighted in orange), "Tickets", and "Buyer Information". On the right side is a form with several fields: "Event Title *" (a text input field), "Event Description *" (a larger text area), "Starts On *" (a date and time selector with a calendar icon and a dropdown menu showing "12:00 AM"), "Ends On *" (a date and time selector with a calendar icon and a dropdown menu showing "5:59 PM"), "Repeat this event" (a checked checkbox), "Event Occur" (a dropdown menu showing "Daily"), "From" (a time selector showing "12:00 AM"), "To" (a time selector showing "12:00 AM"), and "Of the" (a dropdown menu showing "Same day"). In the top right corner of the form area, there is an orange button labeled "Go back to Events".

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

ART HOUSE
VISUAL + PERFORMING ARTS | JERSEY CITY | EST. 2001

ABOUT SHOWS & TICKETS EXHIBITS CALENDAR EDUCATION SHOP PRESS CONTACT **DONATE TODAY!**

EVENTS

Image

11TH ANNUAL SNOW BALL 2017
SATURDAY, JANUARY 28TH, 2017
8PM

Snow Ball 2017: PRESALE TICKETS **Event Title**

1 Ticket Info 2 Registrant Info 3 Payment Info 4 Confirmation

Date & Time
Start & End Time
Starts On: 01/28/2017 8:00 PM
Ends On: 01/28/2017 11:00 PM

Venue Details
Location Details
Art House Productions
160 Newark Avenue
Jersey City, NJ 07310
Jersey City, NJ, 07306

Contact
Contact Details
Art House Productions, Inc.
160 Newark Avenue
Jersey City, NJ 07310
201-915-9911
info@arthouseproductions.org

Location Map

Click here for direction

Event Description
Art House Productions Snow Ball Gala Committee proudly presents the 11th Annual SNOW BALL on SATURDAY, JANUARY 28th, 2016 (Snow Date: Saturday, February 4th). SNOW BALL is a "black tie creative" gala to benefit the New York City Public Library. The evening will feature live music, light fare, open bar, silent auction and a festive, and merry crowd. VIP tickets include a 7pm champagne reception, with exclusive gift bags, first look at our silent auction, and a private concert by a cappella group Cabaret Sauvignon!

TICKET NAME	PRICE	QUANTITY	TOTAL PRICE
VIP Ticket	\$150.00	<input type="text" value="0"/>	\$0.00
SPECIAL PRESALE TICKET	\$80.00	<input type="text" value="0"/>	\$0.00

Tickets

Promo Code
APPLY

CONTINUE

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

The screenshot displays the 'Create Event' form in the Process Donation system. The form is divided into two main sections: 'Location Details' and 'Contact Details'. The 'Location Details' section includes fields for 'Venue *' (with an autocomplete prompt 'Enter a location'), 'Address 1 *', 'Address 2', 'Zip / Postal code *', 'City *', 'State *' (a dropdown menu currently showing '- Select -'), and a 'Banner Image' field with a 'Choose file' button. There is also a checkbox for 'Show map on the event page'. The 'Contact Details' section includes fields for 'Contact Person *', 'Contact Email*', 'Contact Address 1*' (pre-filled with '136 Magnolia Avenue'), 'Contact Address 2', 'Zip / Postal code *' (pre-filled with '07306'), 'City *' (pre-filled with 'Jersey City'), 'State *' (a dropdown menu currently showing 'Illinois'), and 'Contact Phone *' (pre-filled with '242-342-3423'). The top navigation bar includes links for 'DASHBOARD', 'CAUSES', 'FUNDRAISERS', 'EVENTS', 'MEMBERSHIP', 'DONORS', and 'REPORTS'. The user's name 'KAYLEE' is visible in the top right corner.

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

Set Payment Option

Pay Later
(This address will be displayed on the registration page if the buyer chooses the 'pay later' option.)

If you choose to send a check, please address it to:
Art House Productions
136 Magnolia Avenue,
Jersey City, IL, 07306

Be sure to include your full name and mobile number on the check.

If payment is not received before the event, you can pay by cash/credit card at the door.

Provide Registrant the Option to Cover the Processing Fee

Save & Next **Cancel**

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.

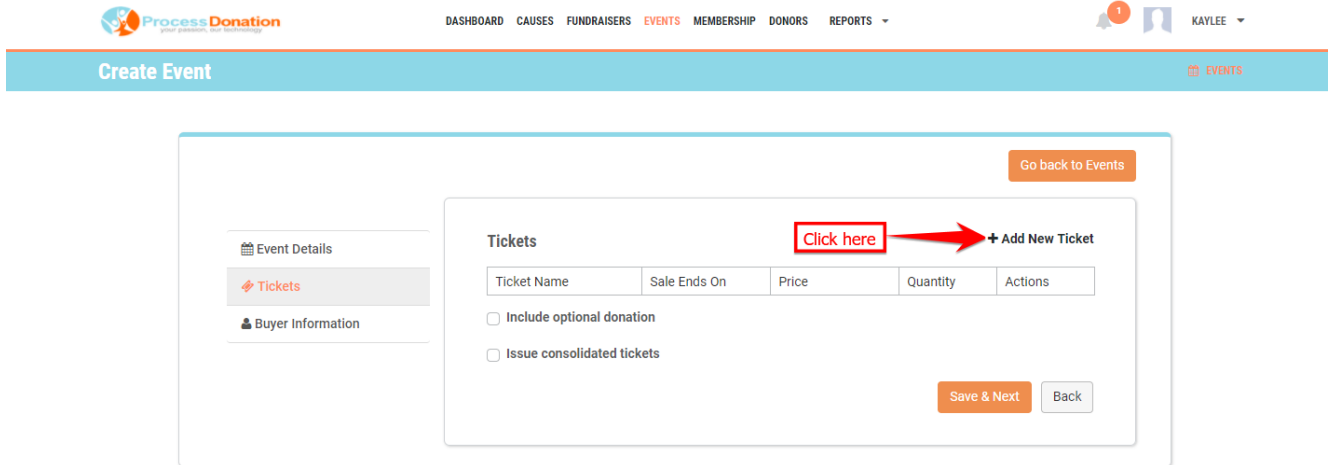
31. **Save & Next** - Click this button to save the information added and proceed to next phase of creating an Event i.e., creating Tickets for the Event.

32. **Cancel** - Click to cancel

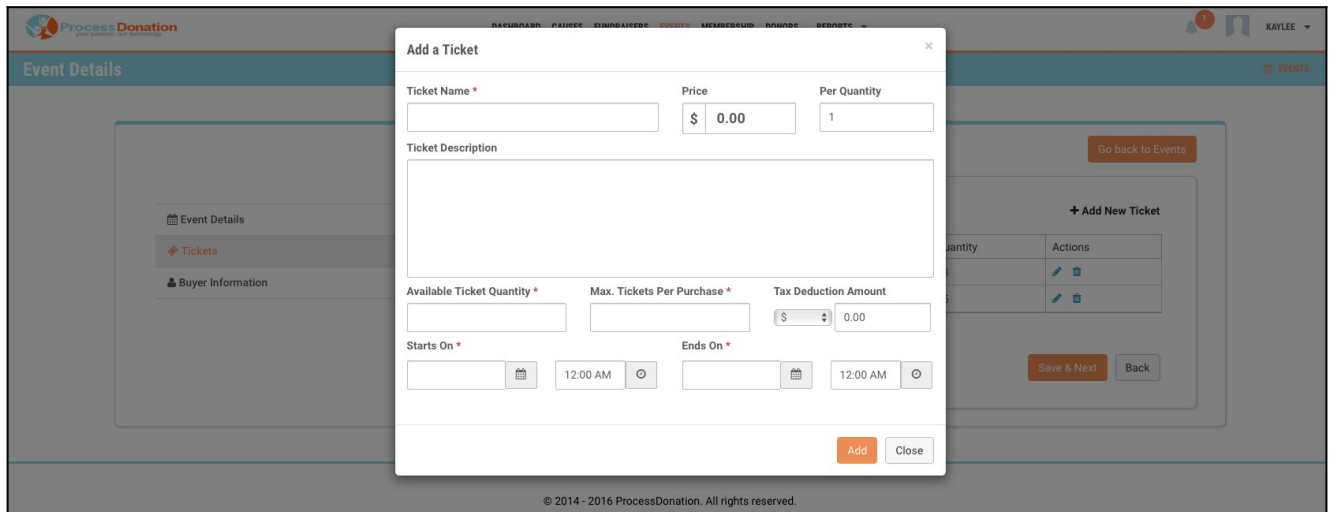
[Next Step: How to add tickets?](#)

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:

Annual Fundraising Event

1 Ticket Info 2 Registrant Info 3 Payment Info 4 Confirmation

Event test

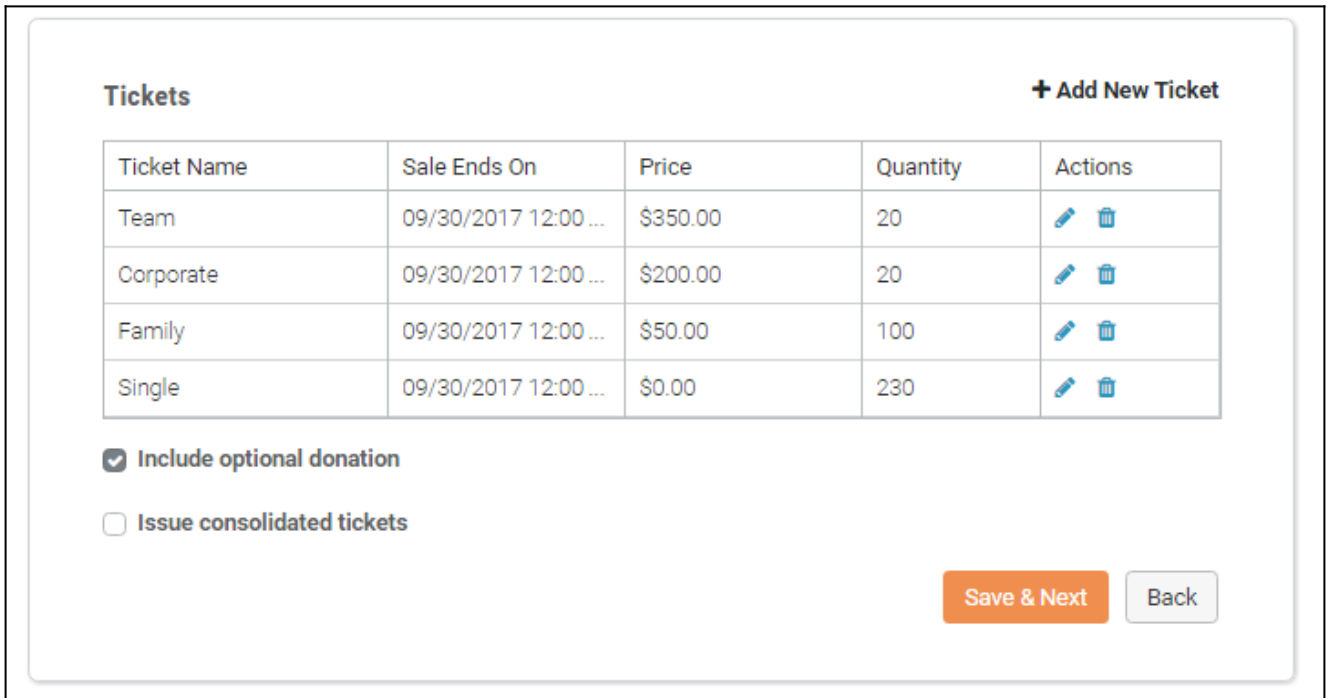
TICKET NAME	PRICE	QUANTITY	TOTAL PRICE
Team	\$350.00	<input type="text" value="0"/>	\$0.00
Corporate	\$200.00	<input type="text" value="0"/>	\$0.00
Family	\$50.00	<input type="text" value="0"/>	\$0.00
Single	\$0.00	<input type="text" value="0"/>	\$0.00









Promo Code:

APPLY

CONTINUE

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

Issue consolidated tickets

[Save & Next](#) [Back](#)

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](#)

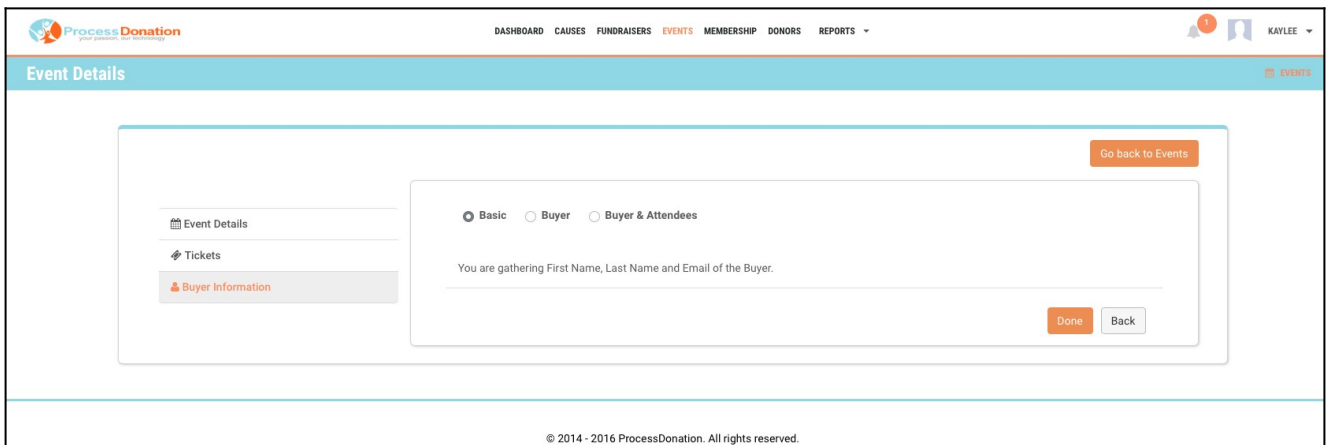
BUYER / ATTENDEE INFORMATION AND CUSTOM QUESTIONS

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.

Basic Buyer Buyer & Attendees

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.

Annual Fundraising Event

- 1 Ticket Info
- 2 Registrant Info
- 3 Payment Info
- 4 Confirmation

Guest Information

* First Name

* Last Name

* Email

[PREVIOUS](#) [NEXT](#)

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.

To include these pre-set questions on your registration form, simply check the box corresponding with the question.

Basic Buyer Buyer & Attendees

Personal Information			Business Information		
	Include	Required		Include	Required
Prefix	<input type="checkbox"/>	<input type="checkbox"/>	Job Role	<input type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Organization	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Middle Name	<input type="checkbox"/>	<input type="checkbox"/>	Industry Type	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Address 1	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Address 2	<input type="checkbox"/>	<input type="checkbox"/>
Alternative Email	<input type="checkbox"/>	<input type="checkbox"/>	City	<input type="checkbox"/>	<input type="checkbox"/>
Mobile	<input checked="" type="checkbox"/>	<input type="checkbox"/>	State	<input type="checkbox"/>	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>	Zip/Postal Code	<input type="checkbox"/>	<input type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>	Work Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>	Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address 1	<input type="checkbox"/>	<input type="checkbox"/>			
Address 2	<input type="checkbox"/>	<input type="checkbox"/>			
City	<input type="checkbox"/>	<input type="checkbox"/>			
State	<input type="checkbox"/>	<input type="checkbox"/>			
Zip/Postal Code	<input type="checkbox"/>	<input type="checkbox"/>			
Spouse Name	<input type="checkbox"/>	<input type="checkbox"/>			
Number of Children	<input type="checkbox"/>	<input type="checkbox"/>			

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

Annual Fundraising Event

1 Ticket Info 2 Registrant Info 3 Payment Info 4 Confirmation

Guest Information

* First Name

* Last Name

* Email

Mobile

Business Information

* Organization

Work Phone

* Website

PREVIOUS NEXT

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.

State

Zip/Postal Code

Spouse Name

Number of Children

Additional Information for Buyer

Custom Questions + Add your custom question(s)

Include Required

[Click here](#)

[Done](#) [Back](#)

Custom Question ✕

Title of your question *

Field type for this question *

- Radio Button (Single option selection) ▼
- Text Box (Free text)
- Radio Button (Single option selection)**
- Check Box (Multiple option selection)
- Drop Down (Single option selection)
- Date Picker (Date selection)
- Textarea (Free text)

[Add Choice](#)

[Save](#) [Cancel](#)



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

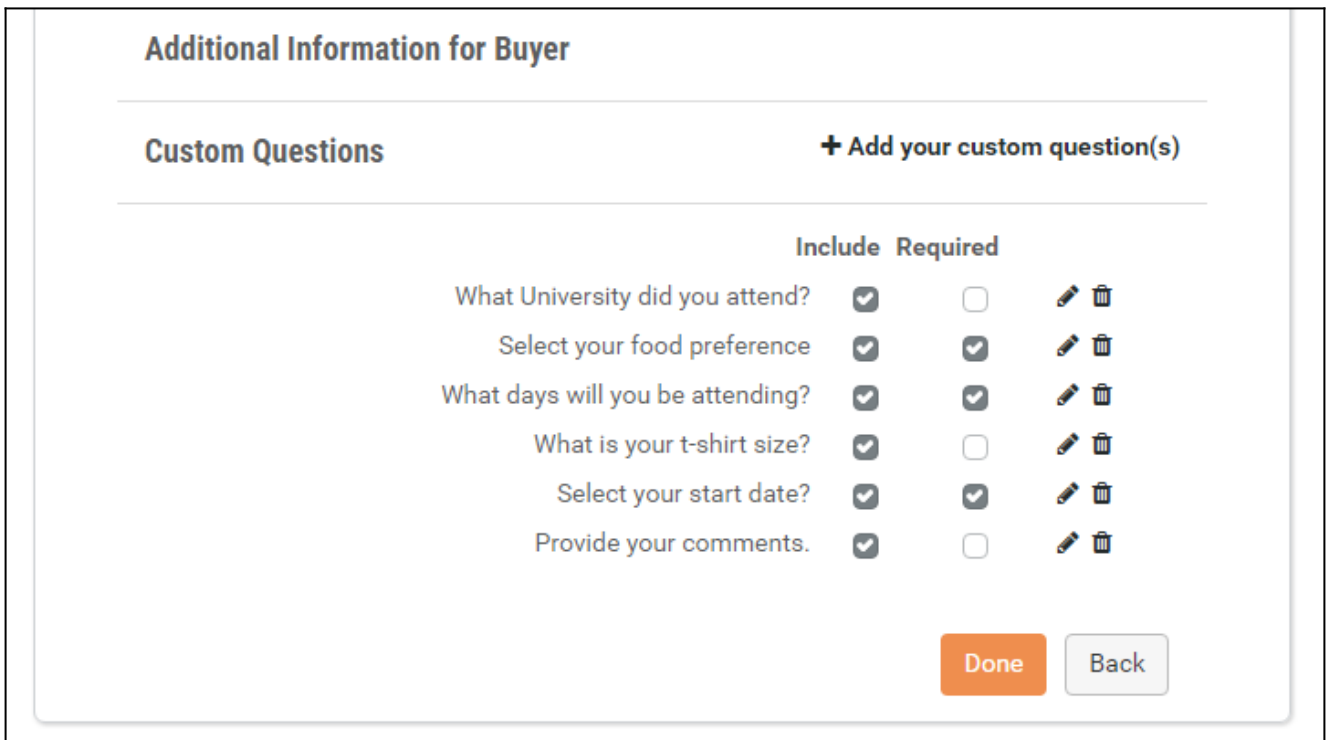
Field type for this question - This describes what type of answer you expect from the Buyer for this custom question.

- **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.



The screenshot shows a form titled "Additional Information for Buyer". Under the "Custom Questions" section, there is a list of six questions. Each question has two checkboxes: "Include" and "Required". To the right of each question are two icons: a pencil (edit) and a trash can (delete). At the bottom right of the form are two buttons: "Done" (orange) and "Back" (grey).

Question	Include	Required	Edit	Delete
What University did you attend?	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Select your food preference	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
What days will you be attending?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
What is your t-shirt size?	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Select your start date?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Provide your comments.	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

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

Additional questions

What University did you attend?

*** Select your food preference**


Italian Mexican Chinese Other

*** What days will you be attending?**

Day 1
 Day 2
 Day 3

What is your t-shirt size?

*** Select your start date?**

Provide your comments.

PREVIOUS **NEXT**

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:

To include these pre-set questions on your registration form, simply check the box corresponding with the question.

Basic Buyer Buyer & Attendees

Buyer Attendee

Personal Information				Business Information				
	Include	Required		Include	Required		Include	Required
Prefix	<input type="checkbox"/>	<input type="checkbox"/>	Job Role	<input type="checkbox"/>	<input type="checkbox"/>	Organization	<input checked="" type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Industry Type	<input type="checkbox"/>	<input type="checkbox"/>	Address 1	<input type="checkbox"/>	<input type="checkbox"/>
Middle Name	<input type="checkbox"/>	<input type="checkbox"/>	Address 2	<input type="checkbox"/>	<input type="checkbox"/>	City	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	State	<input type="checkbox"/>	<input type="checkbox"/>	Zip/Postal Code	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Work Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alternative Email	<input type="checkbox"/>	<input type="checkbox"/>						
Mobile	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>						
Gender	<input type="checkbox"/>	<input type="checkbox"/>						
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>						
Address 1	<input type="checkbox"/>	<input type="checkbox"/>						
Address 2	<input type="checkbox"/>	<input type="checkbox"/>						
City	<input type="checkbox"/>	<input type="checkbox"/>						
State	<input type="checkbox"/>	<input type="checkbox"/>						
Zip/Postal Code	<input type="checkbox"/>	<input type="checkbox"/>						
Spouse Name	<input type="checkbox"/>	<input type="checkbox"/>						
Number of Children	<input type="checkbox"/>	<input type="checkbox"/>						

And here is where you would enter the Attendee details.

To include these pre-set questions on your registration form, simply check the box corresponding with the question.

Basic Buyer Buyer & Attendees

Buyer **Attendee**

Personal Information			Business Information		
	Include	Required		Include	Required
Prefix	<input type="checkbox"/>	<input type="checkbox"/>	Job Role	<input type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Organization	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Middle Name	<input type="checkbox"/>	<input type="checkbox"/>	Industry Type	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Address 1	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Address 2	<input type="checkbox"/>	<input type="checkbox"/>
Alternative Email	<input type="checkbox"/>	<input type="checkbox"/>	City	<input type="checkbox"/>	<input type="checkbox"/>
Mobile	<input type="checkbox"/>	<input type="checkbox"/>	State	<input type="checkbox"/>	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>	Zip/Postal Code	<input type="checkbox"/>	<input type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>	Work Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>	Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address 1	<input type="checkbox"/>	<input type="checkbox"/>			
Address 2	<input type="checkbox"/>	<input type="checkbox"/>			
City	<input type="checkbox"/>	<input type="checkbox"/>			
State	<input type="checkbox"/>	<input type="checkbox"/>			
Zip/Postal Code	<input type="checkbox"/>	<input type="checkbox"/>			
Spouse Name	<input type="checkbox"/>	<input type="checkbox"/>			
Number of Children	<input type="checkbox"/>	<input type="checkbox"/>			

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

Additional Guests

You can add **1** additional guest(s). **ADD GUEST**

TICKET NAME	FIRST NAME	EMAIL	ACTIONS

PREVIOUS **NEXT**

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.

Guest Information

* First Name	* Last Name
<input type="text"/>	<input type="text"/>
Please enter first name	

Business Information

Organization	Work Phone
<input type="text"/>	<input type="text"/>

Additional questions

What is name of your University?

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

Event Name	Starts On	Tickets Sold	Status	Actions
Help for Education	05/26/2017 12:00 AM	0/200	Upcoming	Manage Promo Codes Deactivate
13th Annual Evening of Chocolat...	05/06/2017 10:00 AM	0/100	Ongoing	Manage Promo Codes Deactivate
Best of the music	05/30/2017 5:00 PM	2/60	Upcoming	Manage Promo Codes Deactivate
Spring Fundraising Event	03/03/2017 12:00 AM	0/250	Deactivated	Manage Promo Codes Activate
Benefit Concert Ed Shereen	03/02/2017 12:00 AM	0/100	Deactivated	Manage Promo Codes Activate
Annual Fundraising Event	03/01/2017 12:00 AM	1/100	Completed	Manage Promo Codes Deactivate

age.

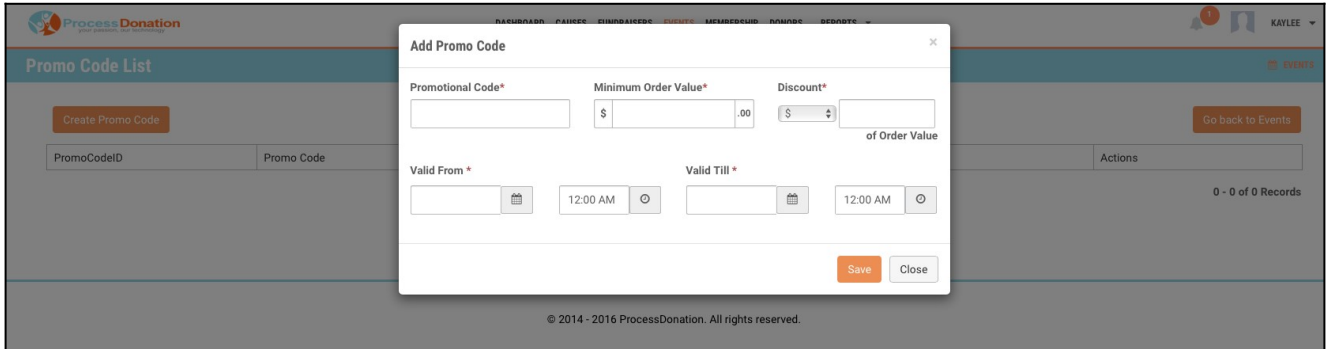
On the next page i.e., **Promo Code List** page click on **Create Promo Code** button

PromoCodeID	Promo Code	Valid From	Valid Till	Status	Actions
-------------	------------	------------	------------	--------	---------

0 - 0 of 0 Records

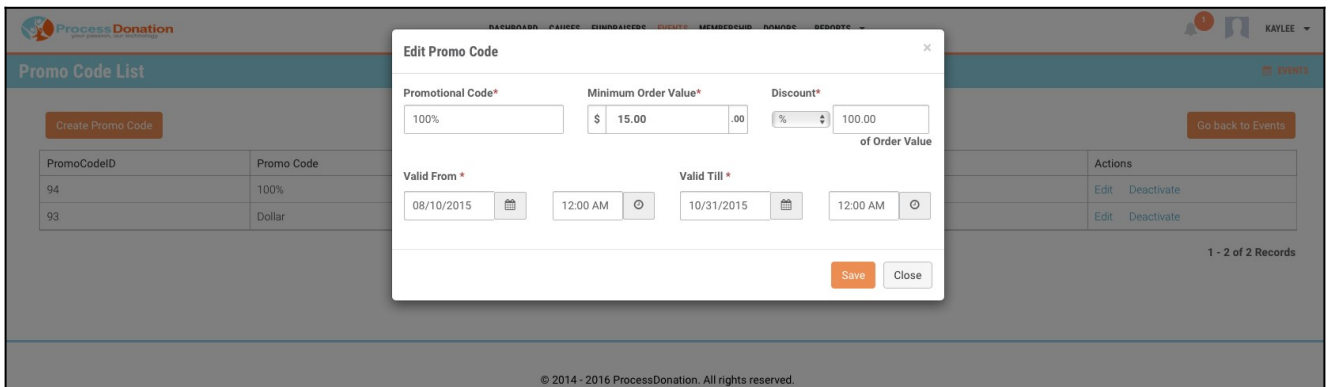
- **Promotional Code** – Enter name/code you want to assign to a Promotional Code

- **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 **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 Deactivate link corresponding to the Promo Code ID and confirm your action.

The screenshot shows the 'Promo Code List' interface in the Process Donation system. A confirmation dialog box is overlaid on the page, asking 'Are you sure you want to deactivate this promo code?' with 'Yes' and 'No' buttons. The background shows a table with columns for PromoCodeID, Promo Code, Value, Start Date, End Date, Status, and Actions. Two records are visible: one for '100%' and one for 'Dollar'. A 'Create Promo Code' button is on the left, and a 'Go back to Events' button is on the right. The footer contains the copyright notice: '© 2014 - 2016 ProcessDonation. All rights reserved.'

PromoCodeID	Promo Code	Value	Start Date	End Date	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

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.

Event Name	Starts On	Tickets Sold	Status	Actions
Help for Education	05/26/2017 12:00 AM	0/200	Upcoming	Manage Promo Codes Deactivate
13th Annual Evening of Chocolat...	05/06/2017 10:00 AM	0/100	Ongoing	Manage Promo Codes Deactivate
Best of the music	05/30/2017 5:00 PM	2/60	Upcoming	Manage Promo Codes Deactivate
Spring Fundraising Event	03/03/2017 12:00 AM	0/250	Deactivated	Manage Promo Codes Activate
Benefit Concert Ed Shereen	03/02/2017 12:00 AM	0/100	Deactivated	Manage Promo Codes Activate
Annual Fundraising Event	03/01/2017 12:00 AM	1/100	Completed	Manage Promo Codes Deactivate

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.

Event Name	Starts On	Tickets Sold	Status	Actions
Help for Education	05/26/2017 12:00 AM	0/200	Upcoming	Manage Promo Codes Deactivate
13th Annual Evening of Chocolat...	05/06/2017 10:00 AM	0/100	Ongoing	Manage Promo Codes Deactivate
Best of the music	05/30/2017 5:00 PM	2/60	Upcoming	Manage Promo Codes Deactivate
Spring Fundraising Event	03/03/2017 12:00 AM	0/250	Deactivated	Manage Promo Codes Activate
Benefit Concert Ed Shereen	03/02/2017 12:00 AM	0/100	Deactivated	Manage Promo Codes Activate
Annual Fundraising Event	03/01/2017 12:00 AM	1/100	Completed	Manage Promo Codes Deactivate
Test Event	01/01/2017 12:00 AM	0/200	Completed	Manage Promo Codes Deactivate

Confirm your action by clicking on Yes.

Confirm

Are you sure you want to deactivate this event?

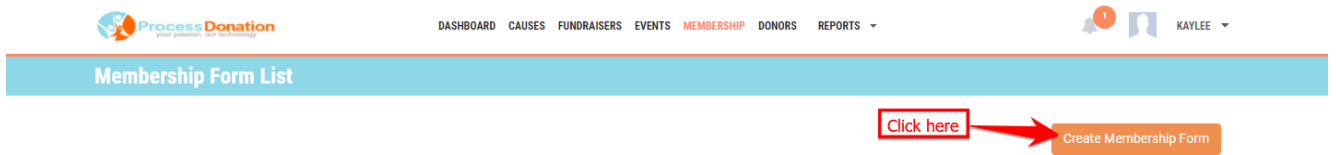
[Click here](#)

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):

The screenshot shows a website header for 'ART HOUSE' with the tagline 'VISUAL + PERFORMING ARTS | JERSEY CITY | EST. 2001'. Below the header is a navigation menu with links for ABOUT, SHOWS & TICKETS, EXHIBITS, CALENDAR, EDUCATION, SHOP, PRESS, and CONTACT, along with a 'DONATE TODAY!' button. The main content area is titled 'MEMBERSHIP' and features a 'Become a Member!' section with a three-step progress indicator: 1. Member Info, 2. Payment Info, and 3. Confirmation. To the left of the form is the 'Contact Information' for Art House Productions, Inc., including the address and phone number. The 'Membership Form' itself contains a dropdown menu for 'Membership Levels' with the text 'Please Select' and a small downward arrow. A red asterisk and the text '*Required field' are visible in the top right corner of the form area.

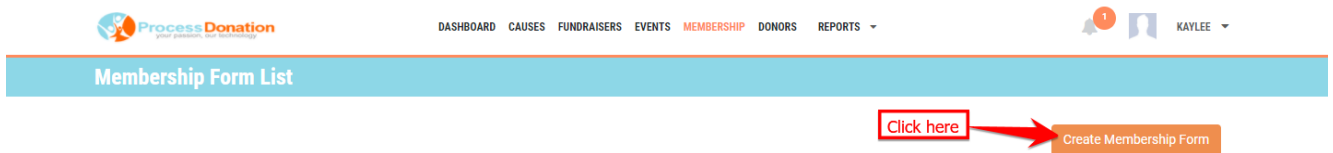
[NEXT: CREATE A MEMBERSHIP FORM](#)

[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.

The screenshot shows the 'Membership Details' form in the Process Donation system. The form is titled 'Membership Details' and is located in the 'MEMBERSHIP' section of the dashboard. The form includes the following fields and options:

- Title ***: A text input field containing 'Become a Member!'.
- Description ***: A text area containing 'You are invited and encouraged to attend our meetings and participate in our projects. Donations are gratefully accepted and always welcome. As a member you get to learn about and be apart of our community history!'.
- Reminder Days**: A text input field and a checkbox labeled 'Daily Reminder'.
- Contact Details**: A section containing several fields:
 - Contact Person***: A text input field.
 - Contact Email***: A text input field.
 - Contact Address 1***: A text input field containing '136 Magnolia Avenue'.
 - Contact Address 2**: A text input field.
 - Zip / Postal code ***: A text input field containing '07306'.
 - City ***: A text input field containing 'Jersey City'.
 - State ***: A dropdown menu showing 'Illinois'.
 - Contact Phone ***: A text input field containing '242-342-3423'.
- Provide Member the Option to Cover the Processing Fee**: A checkbox.

Buttons: 'Go back to Membership Form List' (top right), 'Save & Next' (bottom right), and 'Cancel' (bottom right).

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

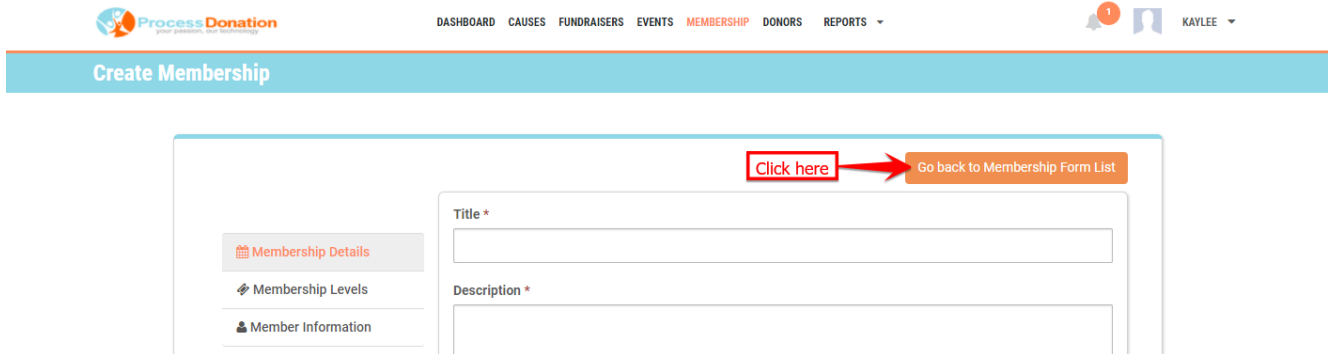
[**NEXT: ADD MEMBERSHIP LEVELS**](#)

[**PREVIOUS:**](#)

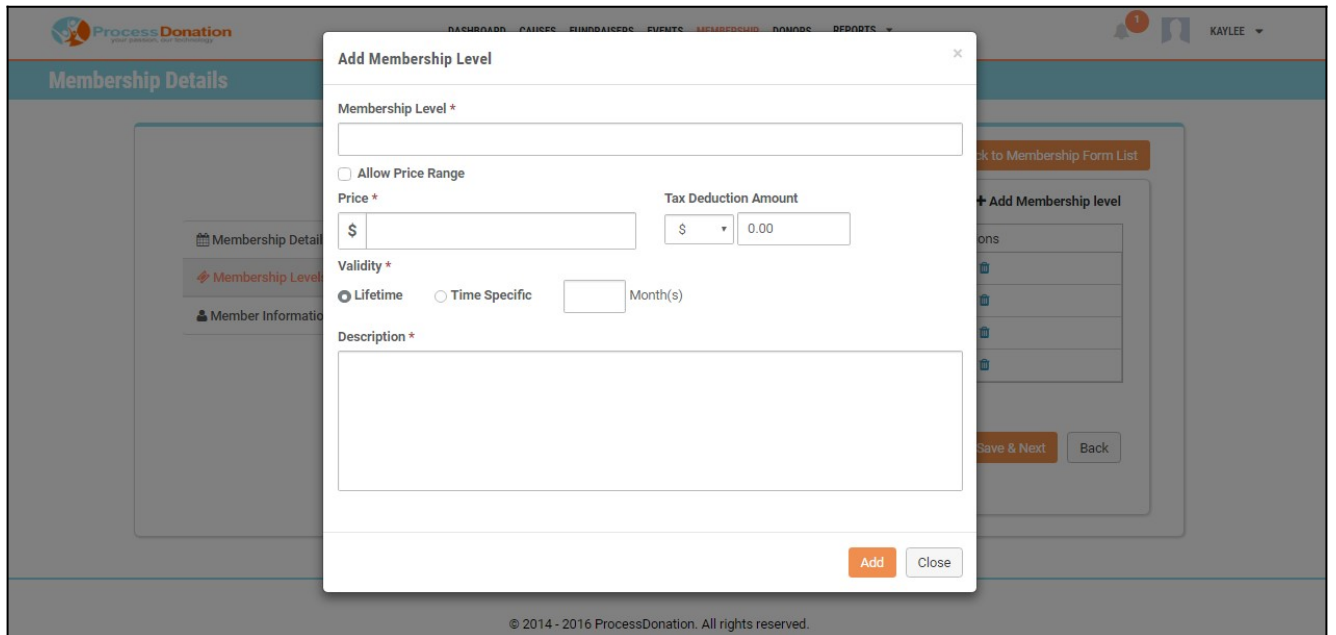
[**CREATE A MEMBERSHIP FORM**](#)

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.

Process Donation
your passion. our commitment.

DASHBOARD CAUSES FUNDRAISERS EVENTS MEMBERSHIP DONORS REPORTS

KAYLEE

Membership Details

Go back to Membership Form List

To include these pre-set questions on your membership form, simply check the box corresponding with the question.

Personal Information		Business Information	
Include	Required	Include	Required
Prefix	<input type="checkbox"/>	Job Role	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	Organization	<input type="checkbox"/>
Middle Name	<input type="checkbox"/>	Industry Type	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	Address 1	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	Address 2	<input type="checkbox"/>
Alternative Email	<input type="checkbox"/>	City	<input type="checkbox"/>
Mobile	<input type="checkbox"/>	State	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>	Zip/Postal Code	<input type="checkbox"/>
Gender	<input type="checkbox"/>	Work Phone	<input type="checkbox"/>
Date of Birth	<input type="checkbox"/>	Website	<input type="checkbox"/>
Address 1	<input type="checkbox"/>		
Address 2	<input type="checkbox"/>		
City	<input type="checkbox"/>		
State	<input type="checkbox"/>		
Zip/Postal Code	<input type="checkbox"/>		
Spouse Name	<input type="checkbox"/>		
Number of Children	<input type="checkbox"/>		

Additional Information for Member

Custom Questions + Add your custom question(s)

Include Required

Done Back

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.

This screenshot shows a form titled "Additional Information for Buyer". It contains several fields with checkboxes: "State", "Zip/Postal Code", "Spouse Name", and "Number of Children". Below these fields is a section for "Custom Questions" with a button labeled "+ Add your custom question(s)". A red box highlights this button, and a red arrow points to it from the text "Click here". At the bottom of the form are "Done" and "Back" buttons.

This screenshot shows the "Membership Details" page with a modal dialog titled "Custom Question" open. The dialog has two input fields: "Title of your question *" and "Field type for this question *". The "Field type" dropdown is set to "Text Box (Free text)". There are "Save" and "Cancel" buttons at the bottom of the dialog. The background shows the same form as the previous screenshot, but it is dimmed.

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.

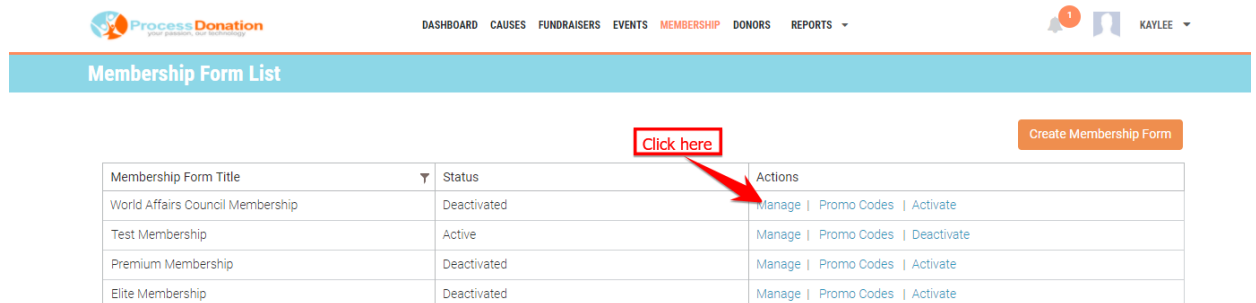
[**NEXT: MANAGE A MEMBERSHIP FORM**](#)

[**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.



The screenshot shows the 'Membership Form List' page. At the top, there is a navigation bar with 'MEMBERSHIP' highlighted. Below the navigation bar is a table with the following data:

Membership Form Title	Status	Actions
World Affairs Council Membership	Deactivated	Manage Promo Codes Activate
Test Membership	Active	Manage Promo Codes Deactivate
Premium Membership	Deactivated	Manage Promo Codes Activate
Elite Membership	Deactivated	Manage Promo Codes Activate

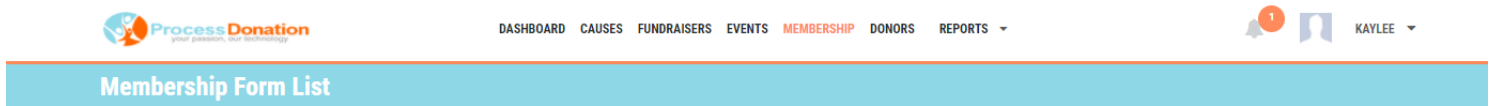
To manage an existing membership click on **Manage** link corresponding to the membership form title and you will be redirected to the page where you could edit the information, where the flow will be similar to creating a new Membership Form.

[NEXT: DEACTIVATE A MEMBERSHIP FORM](#)
[MEMBERSHIP FORM TO YOUR WEBSITE](#)

[PREVIOUS: LINK](#)

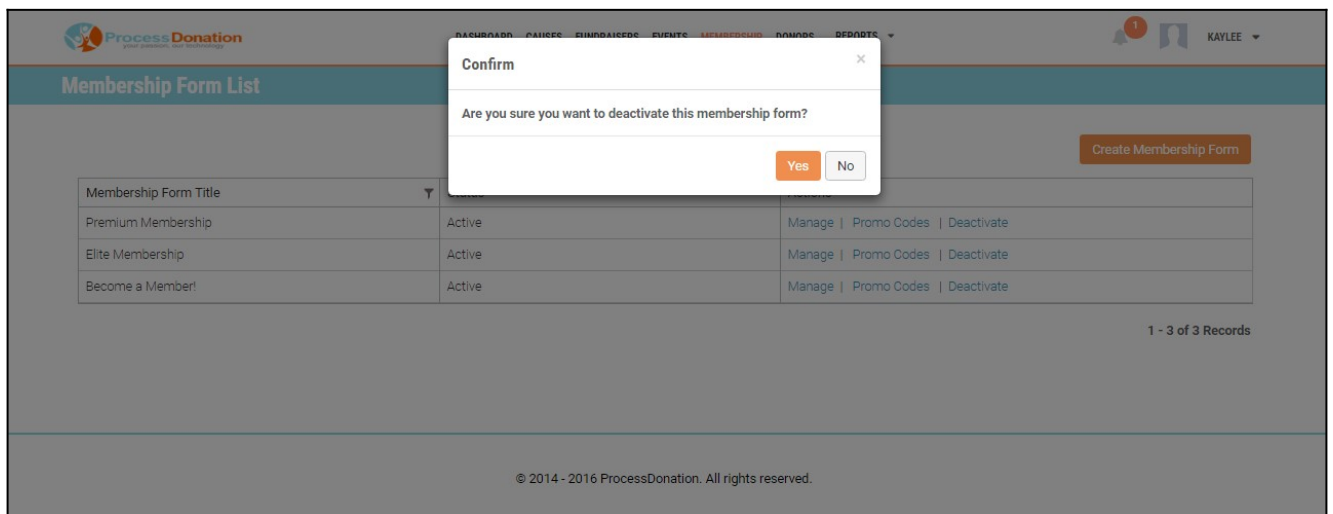
DEACTIVATE A MEMBERSHIP FORM

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.



Membership Form Title	Status	Actions
World Affairs Council Membership	Deactivated	Manage Promo Codes Activate
Test Membership	Active	Manage Promo Codes Deactivate
Premium Membership	Deactivated	Manage Promo Codes Activate
Elite Membership	Deactivated	Manage Promo Codes Activate

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.

Membership Form Title	Status	Actions
World Affairs Council Membership	Deactivated	Manage Promo Codes Activate
Test Membership	Active	Manage Promo Codes Deactivate
Premium Membership	Deactivated	Manage Promo Codes Activate
Elite Membership	Deactivated	Manage Promo Codes Activate

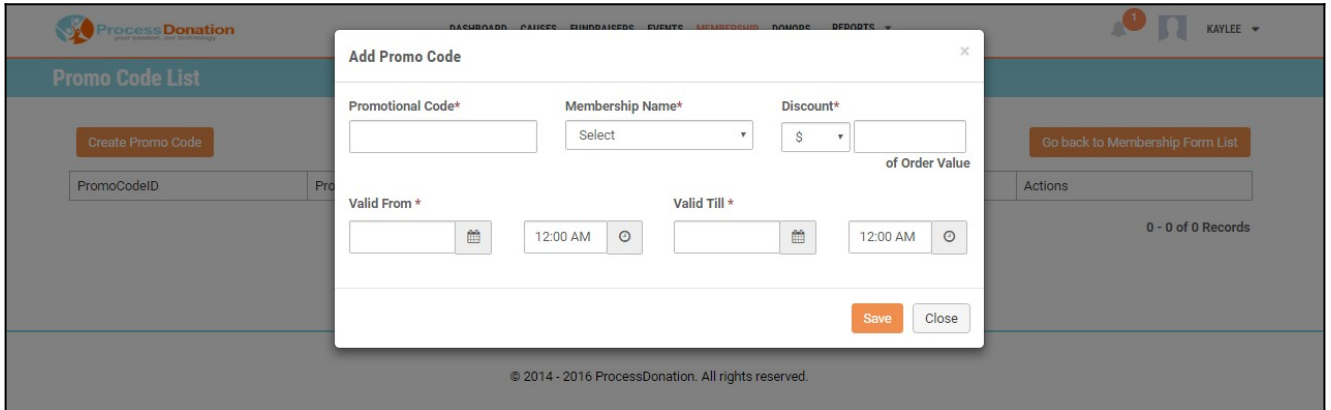
On the next page i.e., **Promo Code List** page click on **Create Promo Code** button

PromoCodeID	Promo Code	Membership Name	Status	Actions
-------------	------------	-----------------	--------	---------

0 - 0 of 0 Records

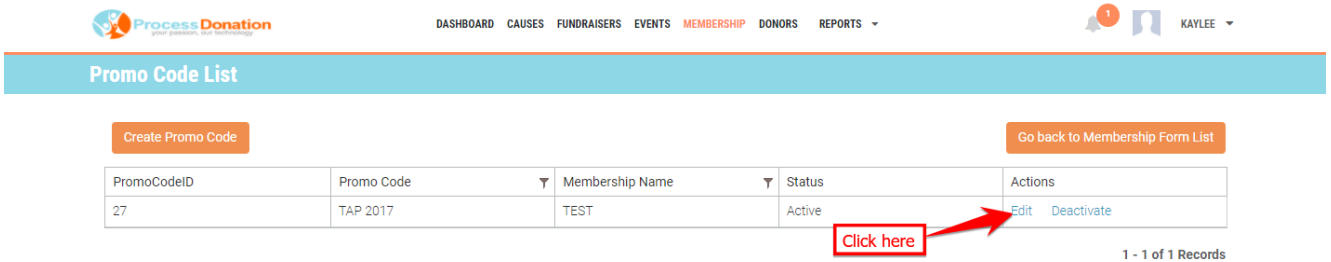
- **Promotional Code** – Enter name/code you want to assign to a promotional code
- **Membership Name** – Choose the Membership name you want the promo code to be applicable
- **Discount** – Define the discount you want to allow for users, using this promotional code
- **Valid From** – Select the start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

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

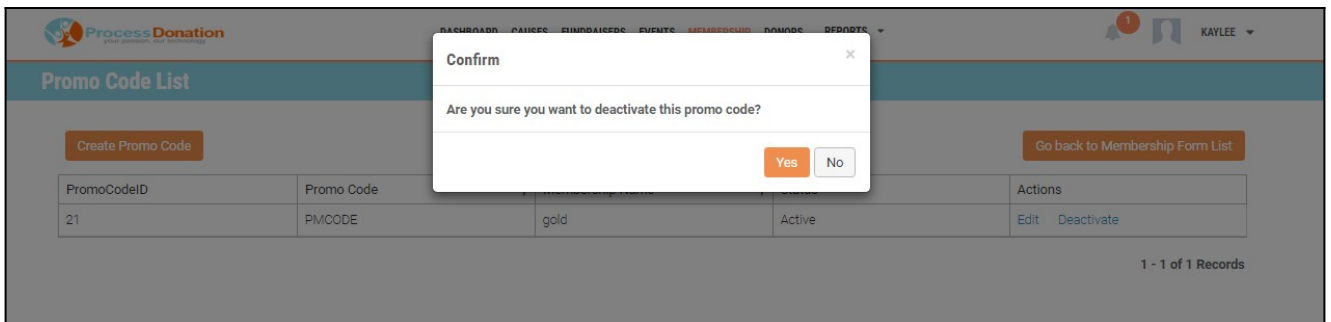


Upon clicking on **Save** button the Promo Code will be saved.

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		testdonation48@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		john DOE@processdonation.org	\$100.00	09/14/2016
Prasad	Papudesi		prasad@processdonation.org	\$150.00	09/12/2016
Elliott	James		ejames@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.

Process Donation
your passion, our commitment

DASHBOARD CAUSES FUNDRAISERS EVENTS MEMBERSHIP DONORS REPORTS

KAYLEE

Donors List Click here DONORS

Add Donor Export

First Name	Last Name	Organization Name	Email	Amount Transacted	
Dwight	Dwight			\$50.00	
James	Smith			\$175.00	
Lindy	Gardner			\$100.00	
John	Doe			\$150.00	
Prasad	Papudesi			\$50.00	

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:

Add Donor

First Name *

Last Name *

Organization Name

Date Of Birth

Email

Alternate Email

Preferred Phone

Mobile Phone

Home Phone

Work Phone

Address1

Address2

City

State

Zip / Postal Code

Country

Best time to call

Category *

Interest Area

About Donor

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.

The screenshot shows the 'Donors List' page. At the top, there is a navigation bar with 'DONORS' highlighted. Below the navigation bar, there is a header for 'Donors List' and a 'DONORS' icon. The main content area contains a table of donors. The table has the following columns: First Name, Last Name, Organization Name, Email, Amount Transacted, and Donor Since. The first row is highlighted in orange and contains the following data: Nancy Taylor, Connex info systems, j.taylor@connexinfo.com, \$15.93, 02/23/2017. The second row contains: PD Sales, Process Donation, sales@processdonation.org, \$175.00, 12/11/2015. The third row contains: Kash Weinberger, Wells Fargo Bank, kash@wellsfargo.com, \$100.00, 12/09/2015. Above the table, there are buttons for 'Add Donor', 'Click here', 'Excel', and 'Export'. A red box highlights the 'Last Name' column header with a red arrow pointing to the 'Taylor' entry in the first row.

First Name	Last Name	Organization Name	Email	Amount Transacted	Donor Since
Nancy	Taylor	Connex info systems	j.taylor@connexinfo.com	\$15.93	02/23/2017
PD	Sales	Process Donation	sales@processdonation.org	\$175.00	12/11/2015
Kash	Weinberger	Wells Fargo Bank	kash@wellsfargo.com	\$100.00	12/09/2015

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

Notes
+

📄 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](#)

📄 12/14/2015 8:00 AM Donor pledged \$50 a month

[View All](#)

Reminders

Recurring Donations
+

Wednesday, January 20, 2016
🕒 10:00 AM
✉ Send email
Encourage donor to renew recurring donation

[View All](#)

📄 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

Activities
+

👤 Kaylee Bruhn (Wife)

[View All](#)

📄 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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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.

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DASHBOARD CAUSES FUNDRAISERS EVENTS MEMBERSHIP DONORS REPORTS

KAYLEE

Donor Details

DONORS

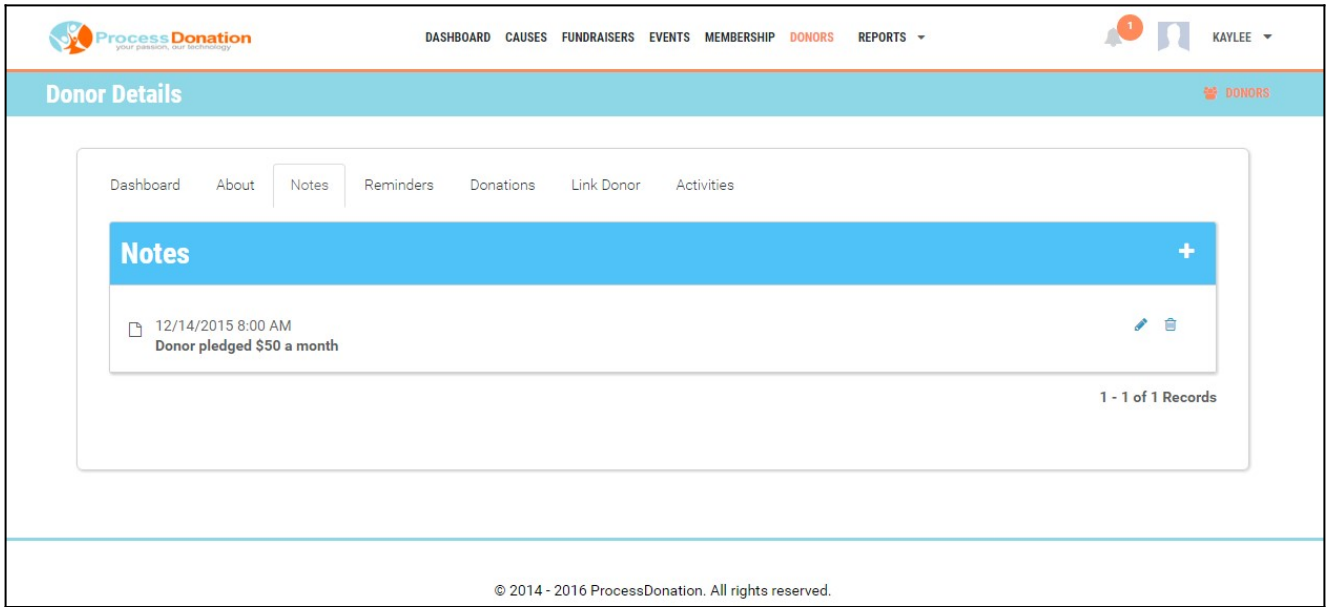
Dashboard About Notes Reminders Donations Link Donor Activities

Donor Details [Click here](#) [Edit](#)

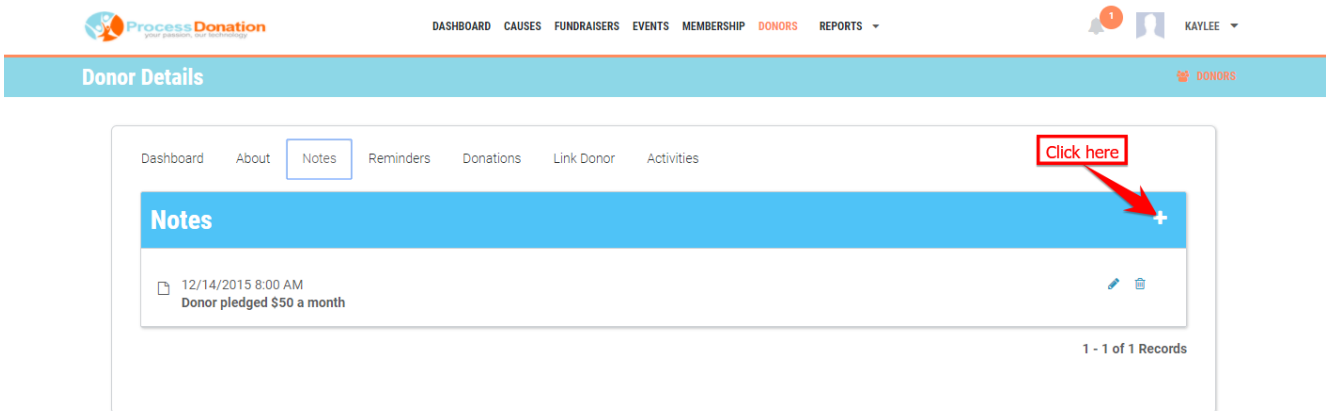
First Name	Kash	Last Name	Weinberger
Organization Name	Wells Fargo Bank	Date Of Birth	03/03/1981
Email	kash@rocketmail.com	Alternate Email	kashw@wellsfargo.com
Preferred Phone	Home Phone	Mobile Phone	619-436-7553
Home Phone	619-224-8893	Work Phone	619-222-3454
Address1	327 San Fernando Street	Address2	
City	San Diego	State	CA
Zip / Postal Code	92106	Country	United States
Best time to call	Mornings (between 9am & 12pm)	Category	Donor
Interest Area	Volunteer Days Attending Spring Gala	About Donor	Kash has been working at Wells Fargo corporate for 15 years. He is the representative for every gala we host.

Notes

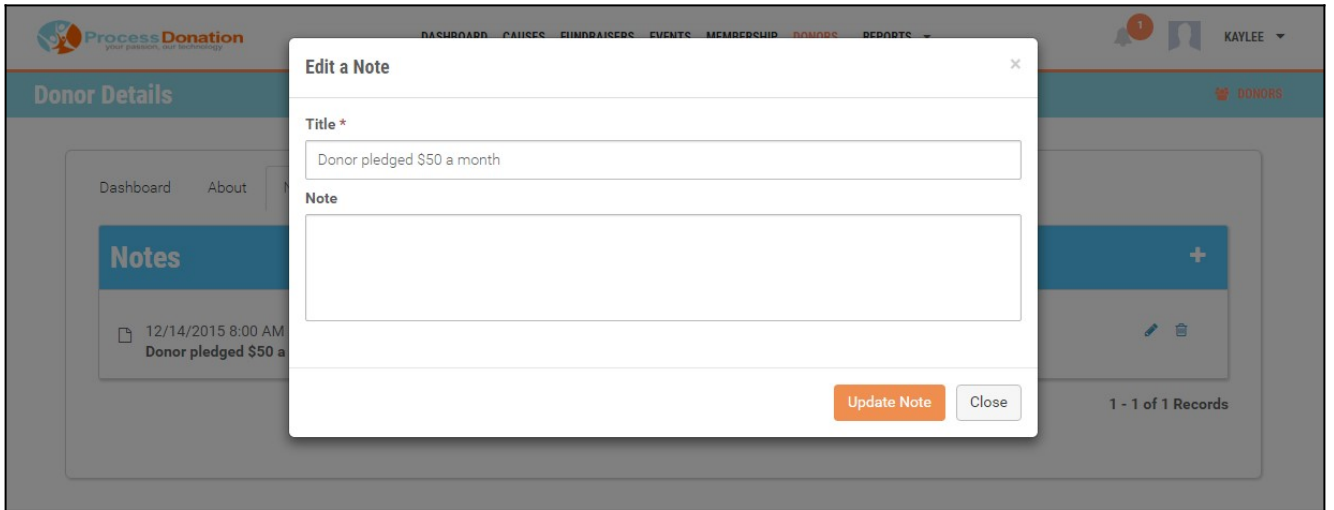
Here is where you would put in some notes about the Donor, maybe to document a conversation. Provide a title to the note to be able to understand the content of the note at a glance.



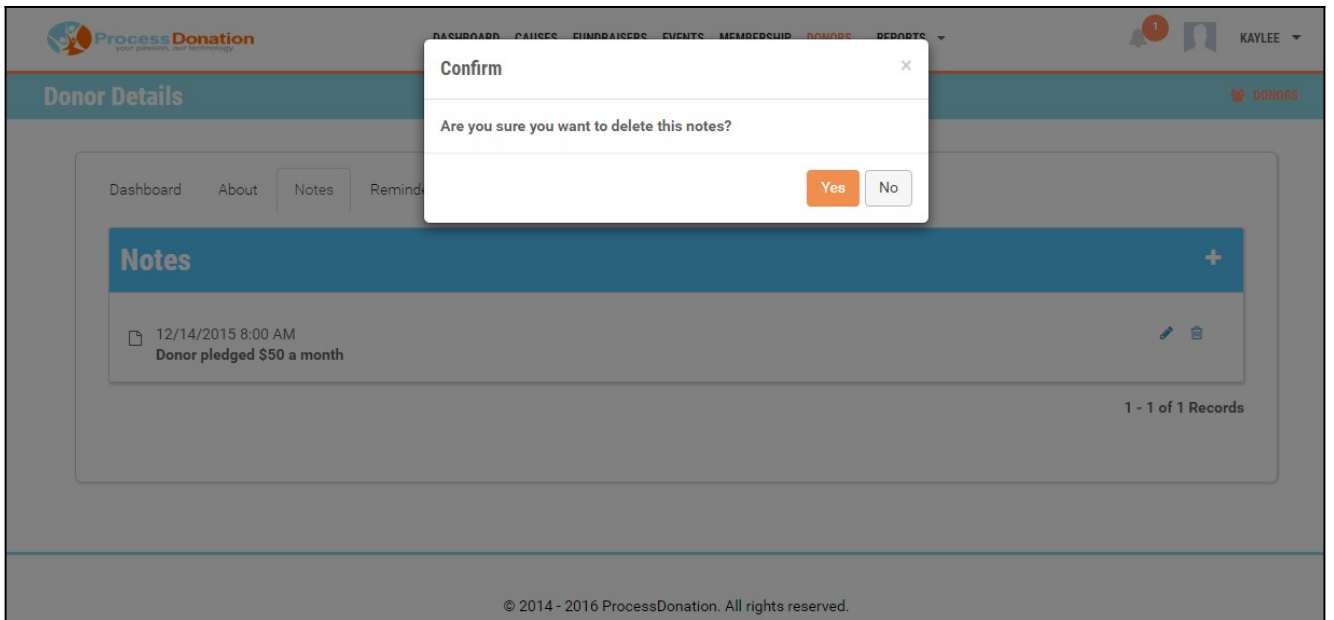
To add a new Note simply click on the plus symbol corresponding to the Notes in the window.



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.

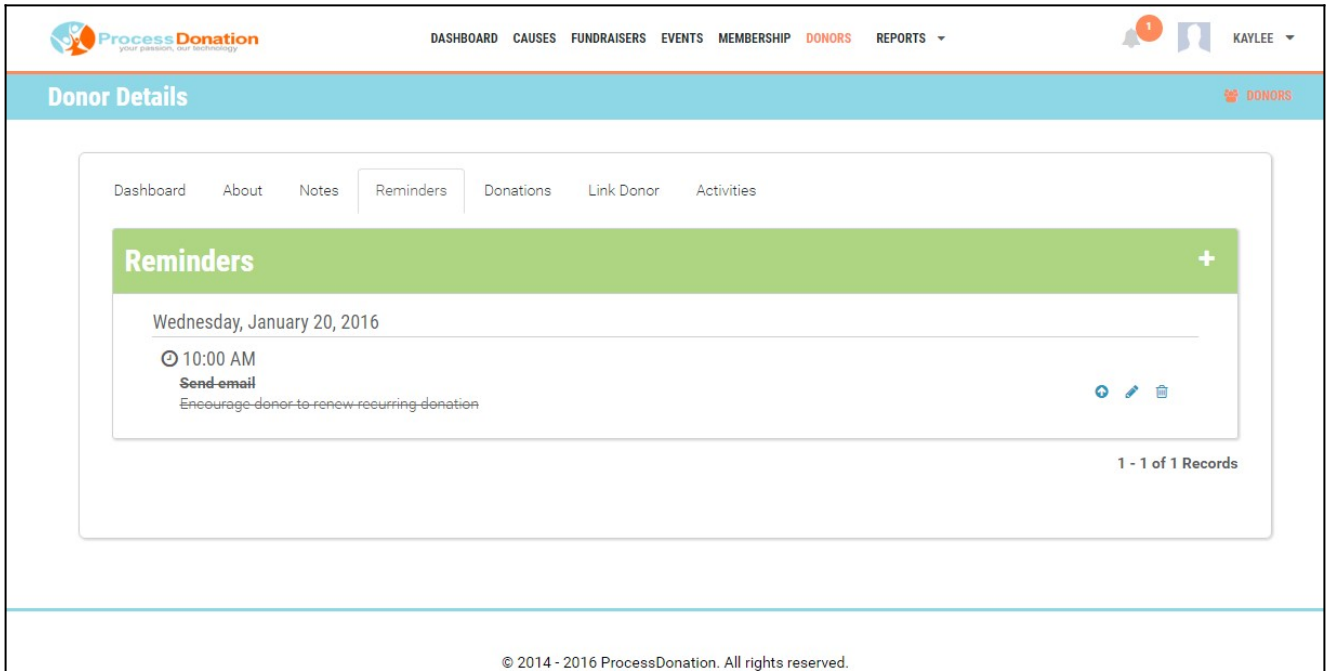


And to delete a Note you could click on the delete icon that is corresponding to the Note you wish to delete and confirm by appropriate action.

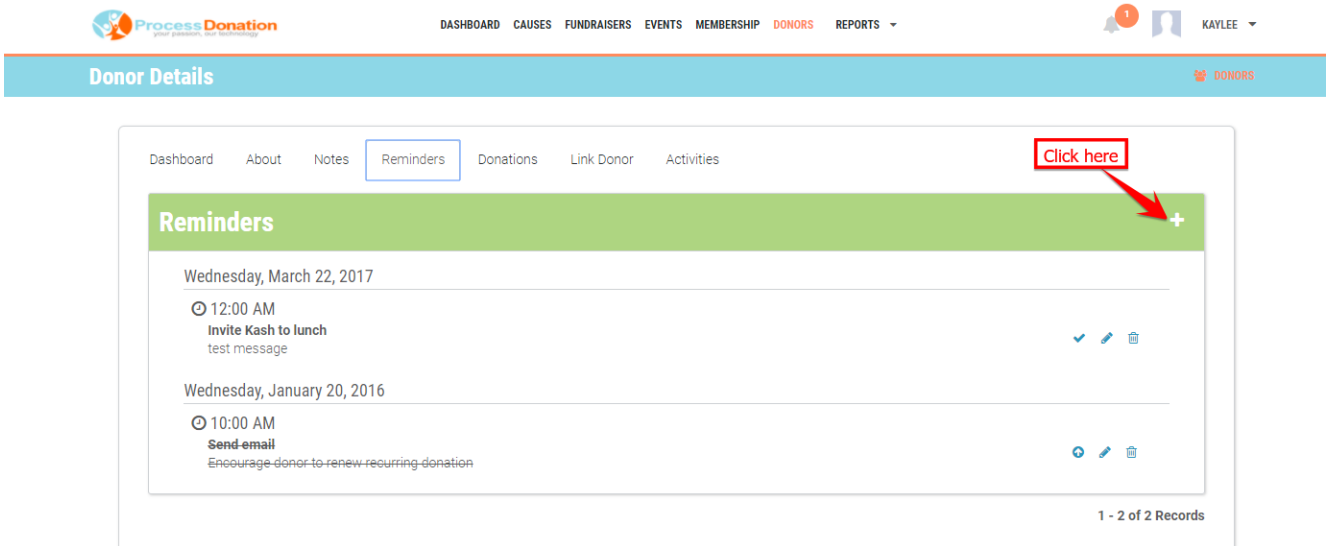


Reminders

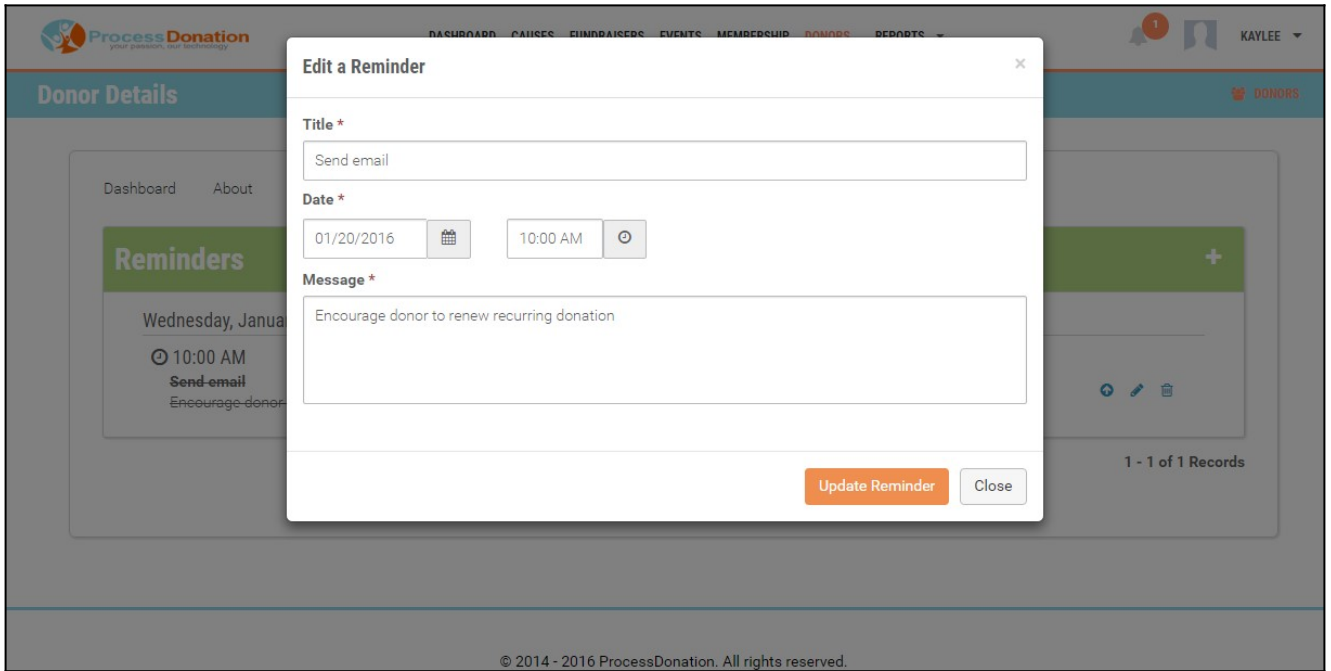
You can set important Reminders for you related to specific Donors; when the Reminder is due you will be notified by the bell icon in the upper right hand corner of the screen (see below, in the picture there is "1" notification).



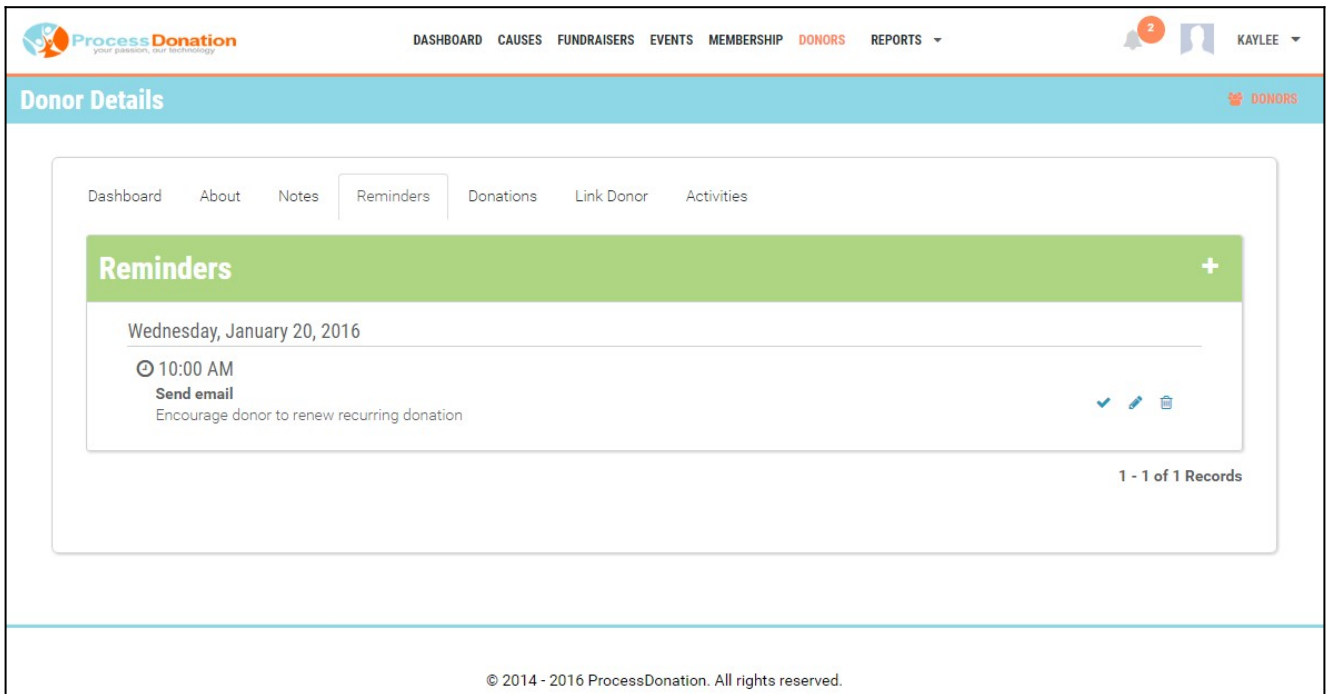
To add a new Reminders simply click on the plus symbol corresponding to the Reminders in the window.

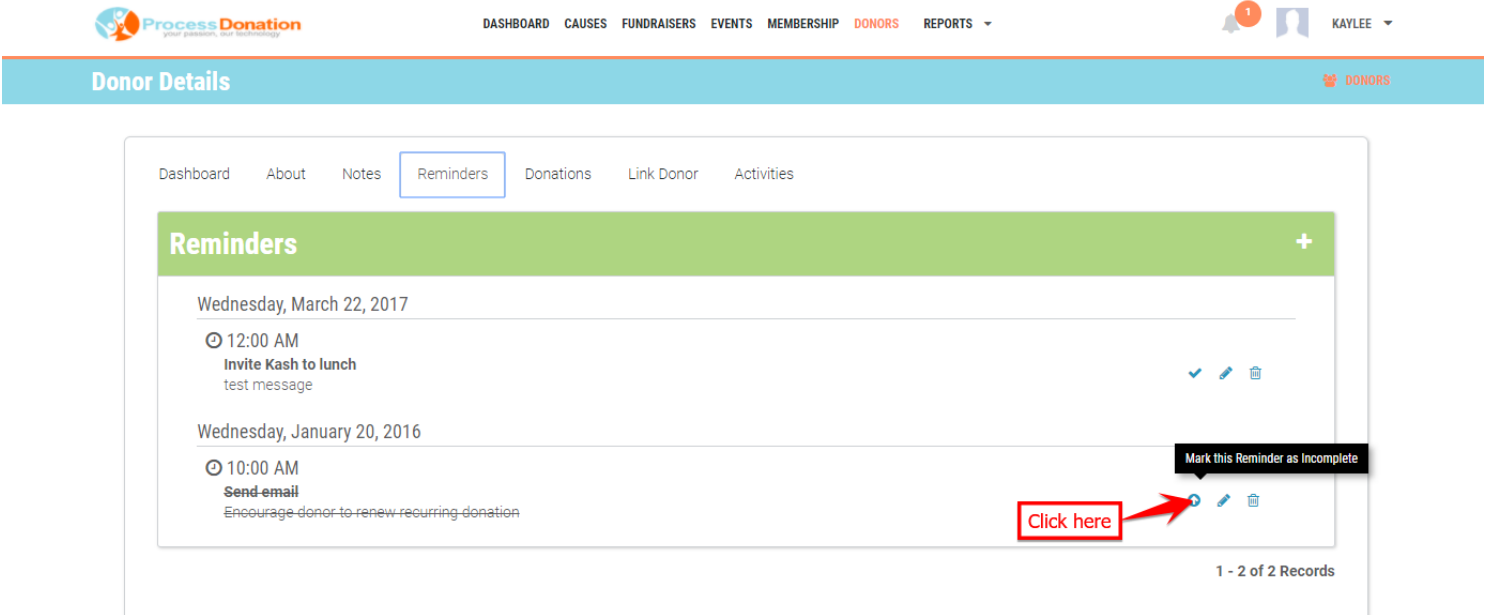


To edit an existing Reminder you could click on the edit symbol corresponding to the Reminder you want to edit, which would launch the Reminders window with information already present.

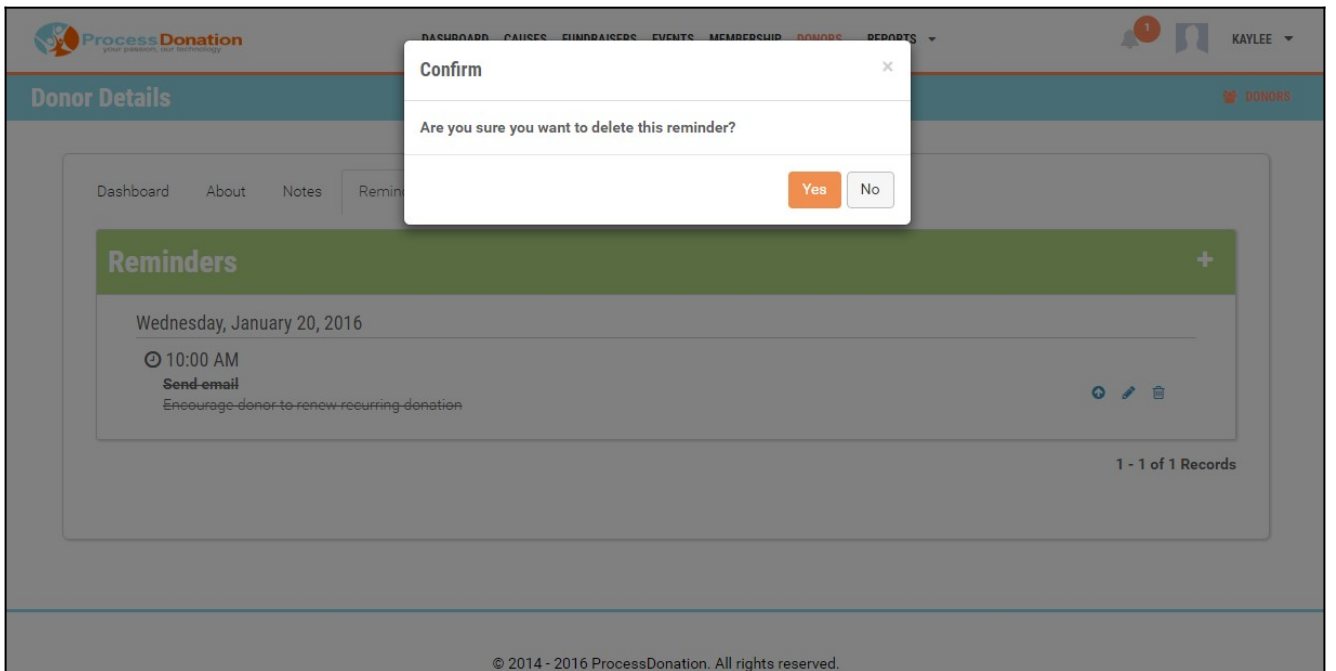


To mark a Reminder complete, you could click on the tick mark corresponding to the Reminder you want to mark as complete, which would change the Reminder as complete.





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.

Donation ID	Date & Time	Name	Category	Title	Payment Type	Amount	Source	State	Status
13094	11/25/2016 00:45:55	Kenly DavidW	Donation	General Dona...	Credit Card	\$51.85	Web	MA	Approved
13093	11/25/2016 00:45:54	Kenly David	Donation	In Honor Of/L...	Credit Card	\$12.52	Web	MA	Approved
13092	11/25/2016 00:45:54	Peter D	Donation	General Dona...	Credit Card	\$51.85	Web	MA	Approved
13025	11/22/2016 06:54:14	Kenly David	Registration	Annual Fundr...	Credit Card	\$101.00	Web	MA	Approved
12962	11/21/2016 00:45:51	James Smith	Donation	Support Art h...	Credit Card	\$26.91	Web	MA	Approved
12932	11/19/2016 00:45:52	Lindy Gardner	Donation	Support Art h...	Credit Card	\$25.00	Web	MA	Approved
12911	11/18/2016 00:45:55	Kenly DavidW	Donation	General Dona...	Credit Card	\$51.85	Web	MA	Approved
12910	11/18/2016 00:45:54	Kenly David	Donation	In Honor Of/L...	Credit Card	\$12.52	Web	MA	Approved
12909	11/18/2016 00:45:54	Peter D	Donation	General Dona...	Credit Card	\$51.85	Web	MA	Approved
12901	11/17/2016 00:45:51	Mark Peters	Donation	General Dona...	Credit Card	\$97.30	Fundraiser	CA	Approved

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

Donation ID	Date & Time	Name	Category	Title	Payment Type	Amount	Sourc...	State	Status
36511	05/17/2017 05:10:...	Mark Peters	Donation	General Dona...	Credit Card	\$207.30	Fundraiser	CA	Declined
36499	05/16/2017 05:10:...	Kenly David	Donation	General Dona...	Credit Card	\$3.21	Web	RI	Declined
36489	05/16/2017 05:10:...	Smith Peter	Donation	General Dona...	Credit Card	\$3.20	Web	MA	Declined
36410	05/15/2017 05:10:...	Kenly David	Donation	General Dona...	Credit Card	\$6.42	Web	MA	Declined
36398	05/15/2017 05:10:...	Smith Peter	Donation	General Dona...	Credit Card	\$6.42	Web	MA	Declined
36372	05/14/2017 05:10:...	Kenly DavidR	Donation	General Dona...	Credit Card	\$51.85	Web	MA	Declined

Sort by any field, and filter the transaction details.

Donation ID	Date & Time	Name	Category	Title	Payment Type	Amount	Sourc...	State	Status
36511		Peters	Donation	General Dona...	Credit Card	\$207.30	Fundraiser	CA	Declined
36499		David	Donation	General Dona...	Credit Card	\$3.21	Web	RI	Declined
36489		h Peter	Donation	General Dona...	Credit Card	\$3.20	Web	MA	Declined
36410	05/15/2017 05:10:...	Kenly David	Donation	General Dona...	Credit Card	\$6.42	Web	MA	Declined
36398	05/15/2017 05:10:...	Smith Peter	Donation	General Dona...	Credit Card	\$6.42	Web	MA	Declined
36372	05/14/2017 05:10:...	Kenly DavidR	Donation	General Dona...	Credit Card	\$51.85	Web	MA	Declined
36337	05/12/2017 07:30:...	manish s	Donation	H.E.A.R.T Pro...	Credit Card	\$4.30	Fundraiser	NJ	Declined

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.

The screenshot shows the 'Recurring Donations' report interface. At the top, there is a navigation bar with 'REPORTS' selected, and a dropdown menu showing 'Recurring Donations' as the active option. Below the navigation, there is a table with the following data:

Recurring ID	Donor Name	Payment Type	Next Process Date	Applied Payments	Amount	Status	Action
919	Kenly DavidW	Credit Card	11/25/2016	6		Active	Edit
917	Kenly DavidR	Credit Card	11/14/2016	1	\$50.00	Active	Edit
916	Kenly David	Credit Card	11/25/2016	6	\$12.00	Active	Edit
913	Peter D	Credit Card	11/25/2016	6	\$50.00	Active	Edit
840	Sharon Banuelos	Credit Card	09/19/2016	0	\$50.00	Active	Edit
839	Jennifer Berlin	Credit Card	09/19/2016	0	\$25.00	Active	Edit
838	Lindy Gardner	Credit Card	11/19/2016	2	\$25.00	Active	Edit
837	James Smith	Credit Card	11/21/2016	9	\$25.00	Active	Edit
706	James Smith	Credit Card	11/11/2016	4	\$50.00	Active	Edit
705	Mitchel Marsh	Credit Card	11/11/2016	4	\$50.00	Active	Edit

Click here

Recurring ID	Donor Name	Payment Type	Next Process Date	Applied Payments	Amount	Status	Action
21354	Smith Peter	Credit Card	06/15/2017	3	\$6.00	Active	Edit
21353	Kenly David	Credit Card	06/15/2017	3	\$6.00	Active	Edit
11316	Nancy Taylor	Credit Card	05/23/2017	3	\$5.31	Active	Edit
11237	Smith Peter	Credit Card	06/16/2017	4	\$3.00	Active	Edit
11234	Peter David	Credit Card	01/16/2018	1	\$3.00	Active	Edit
11233	Peter David	Credit Card	07/16/2017	2	\$3.00	Active	Edit
11232	Kenly David	Credit Card	06/16/2017	4	\$3.00	Active	Edit

Process Donation		DASHBOARD CAUSES FUNDRAISERS EVENTS MEMBERSHIP DONORS REPORTS						KAYLEE	
Recurring Donations									
							Excel	Export	
Recurring ID	Donor Name	Payment Type	Next Process Date	Applied Payments	Amount	Status	Action		
919	Kenly DavidW	Credit Card	11/25/2016	6	\$50.00	Active			
Donation ID	Date	Cause	City	State	Status				
13094	11/25/2016 12:45AM	General Donation	Boston	MA	Approved				
12911	11/18/2016 12:45AM	General Donation	Boston	MA	Approved				
12731	11/11/2016 12:45AM	General Donation	Boston	MA	Approved				
12541	11/04/2016 12:45AM	General Donation	Boston	MA	Approved				
12332	10/28/2016 12:45AM	General Donation	Boston	MA	Approved				
11863	10/14/2016 6:20AM	General Donation	Boston	MA	Approved				
								1 - 6 of 6 items	
917	Kenly DavidR	Credit Card	11/14/2016	1	\$50.00	Active			
916	Kenly David	Credit Card	11/25/2016	6	\$12.00	Active			
913	Peter D	Credit Card	11/25/2016	6	\$50.00	Active			
840	Sharon Banuelos	Credit Card	09/19/2016	0	\$50.00	Active			
839	Jennifer Berlin	Credit Card	09/19/2016	0	\$25.00	Active			

[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.

The screenshot displays the 'Donation Summary' report interface. At the top, there is a navigation bar with 'REPORTS' selected. Below this, a search filter is set to 'Donation Summary'. The report shows a table with the following data:

Cause/Event	Raised Amount	Fee Amount	Donations	Refund Amount	Refunds	Net Amount
Annual Fundraising Event	\$101.00	\$0.00	1	\$0.00	0	\$101.00
General Donation	\$103.70	\$3.70	2	\$0.00	0	\$103.70
In Honor Of/In Memory Of	\$12.52	\$0.52	1	\$0.00	0	\$12.52
Total	\$217.22	\$4.22	4	\$0.00	0	\$217.22

At the bottom of the page, there is a copyright notice: © 2014 - 2016 ProcessDonation. All rights reserved.

[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

The screenshot shows the 'Year End Tax Letter' scheduling page in the Process Donation system. The page has a teal header with the 'Process Donation' logo and navigation links: DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. The 'REPORTS' menu is open, showing options like Donation History, Recurring Donations, Donation Summary, Year End Tax Letter (highlighted), Email History, and Account Statement. The main content area is titled 'Year End Tax Letter' and contains a form with the following fields:

- Schedule Date ***: A date picker field.
- Subject ***: A text input field.
- Message ***: A rich text editor with 'Bold', 'Italic', and 'Under line' options.
- Tags**: A section with placeholders for '(Donor Name)' and '(Total Amount)'.
- Schedule Email**: An orange button to submit the form.

[NEXT: EMAIL HISTORY](#)

[PREVIOUS:](#)

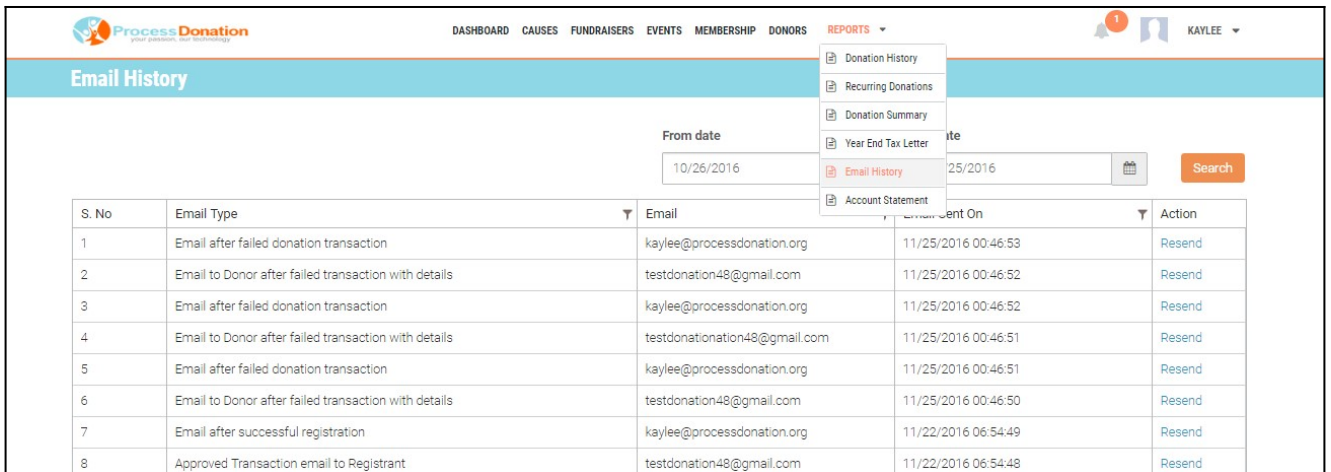
[DONATION SUMMARY](#)

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.



S. No	Email Type	Email	Sent On	Action
1	Email after failed donation transaction	kaylee@processdonation.org	11/25/2016 00:46:53	Resend
2	Email to Donor after failed transaction with details	testdonation48@gmail.com	11/25/2016 00:46:52	Resend
3	Email after failed donation transaction	kaylee@processdonation.org	11/25/2016 00:46:52	Resend
4	Email to Donor after failed transaction with details	testdonation48@gmail.com	11/25/2016 00:46:51	Resend
5	Email after failed donation transaction	kaylee@processdonation.org	11/25/2016 00:46:51	Resend
6	Email to Donor after failed transaction with details	testdonation48@gmail.com	11/25/2016 00:46:50	Resend
7	Email after successful registration	kaylee@processdonation.org	11/22/2016 06:54:49	Resend
8	Approved Transaction email to Registrant	testdonation48@gmail.com	11/22/2016 06:54:48	Resend

[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.

The screenshot shows the 'Account Statement' report interface. At the top, there is a navigation bar with the Process Donation logo and menu items: DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. A user profile for 'GREG' is visible in the top right. The main heading is 'Account Statement'. Below this, there is a 'Date' dropdown menu set to 'March, 2017' and a 'Search' button. To the right, there is an 'Excel' dropdown menu and an 'Export' button. Below these controls is a table with the following columns: Date, Donation Amount, Refund Amount, Chargeback Amount, Chargeback Fee, Processing Fee, Net Donations, and Deposits.

[**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.

The screenshot shows the 'Donation History' report interface. At the top, there is a navigation bar with 'Process Donation' logo and menu items: DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. A user profile 'KAYLEE' is visible in the top right. Below the navigation bar, the report title 'Donation History' is displayed. The main area contains a search and filter section with 'From date' (04/19/2017) and 'To date' (05/18/2017) fields, a 'Search' button, and an 'Excel' dropdown menu. A table of donation records is shown below. A red box labeled 'Click here' points to a dropdown arrow in the 'Name' column of the first row. A filter dropdown menu is open, showing 'Show items with value that:' and a list of names: Peters, David, and h Peter. The table data is as follows:

Donation ID	Date & Time	Name	Category	Title	Payment Type	Amount	Sourc...	State	Status
36511		Peters	Donation	General Dona...	Credit Card	\$207.30	Fundraiser	CA	Declined
36499		y David	Donation	General Dona...	Credit Card	\$3.21	Web	RI	Declined
36489		h Peter	Donation	General Dona...	Credit Card	\$3.20	Web	MA	Declined
36410	05/15/2017 05:10:...	Kenly David	Donation	General Dona...	Credit Card	\$6.42	Web	MA	Declined
36398	05/15/2017 05:10:...	Smith Peter	Donation	General Dona...	Credit Card	\$6.42	Web	MA	Declined
36372	05/14/2017 05:10:...	Kenly DavidR	Donation	General Dona...	Credit Card	\$51.85	Web	MA	Declined
36337	05/12/2017 07:30:...	manish s	Donation	H.E.A.R.T Pro...	Credit Card	\$4.30	Fundraiser	NJ	Declined

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

The screenshot shows the 'Donation History' report interface, similar to the previous one. A red box labeled 'Click here' points to the 'Excel' dropdown menu. The dropdown menu is open, showing options: Excel, CSV, and PDF. The table data is as follows:

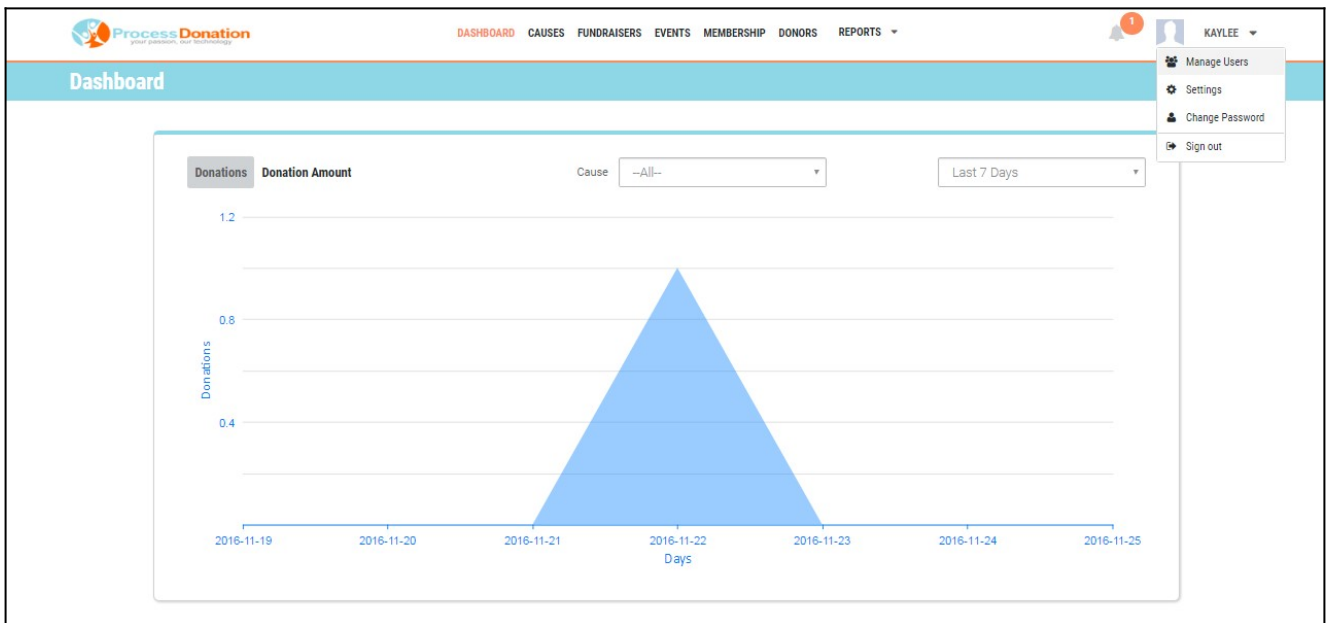
Donation ID	Date & Time	Name	Category	Title	Payment Type	Amount	Sourc...	Status
36511	05/17/2017 05:10:...	Mark Peters	Donation	General Dona...	Credit Card	\$207.30	Fundraiser	Declined
36499	05/16/2017 05:10:...	Kenly David	Donation	General Dona...	Credit Card	\$3.21	Web	Declined
36489	05/16/2017 05:10:...	Smith Peter	Donation	General Dona...	Credit Card	\$3.20	Web	Declined
36410	05/15/2017 05:10:...	Kenly David	Donation	General Dona...	Credit Card	\$6.42	Web	Declined
36398	05/15/2017 05:10:...	Smith Peter	Donation	General Dona...	Credit Card	\$6.42	Web	Declined
36372	05/14/2017 05:10:...	Kenly DavidR	Donation	General Dona...	Credit Card	\$51.85	Web	Declined

[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

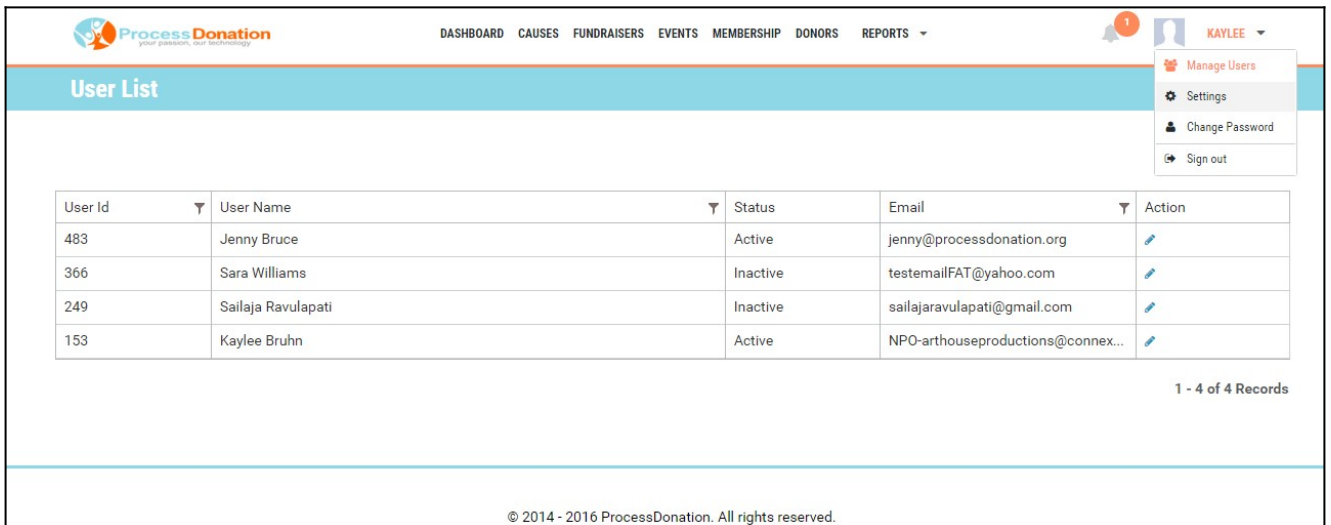
The User module is designed to give you the ability to create the users with Admin and User role permissions.

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.



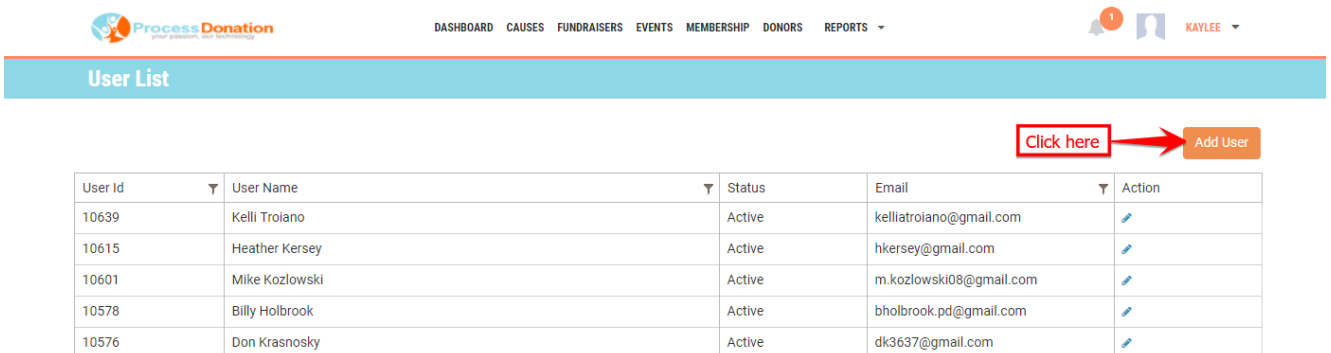
User Id	User Name	Status	Email	Action
483	Jenny Bruce	Active	jenny@processdonation.org	✎
366	Sara Williams	Inactive	testemailFAT@yahoo.com	✎
249	Sailaja Ravulapati	Inactive	sailajaravulapati@gmail.com	✎
153	Kaylee Bruhn	Active	NPO-arthouseproductions@connex...	✎

1 - 4 of 4 Records

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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.



User Id	User Name	Status	Email	Action
10639	Kelli Troiano	Active	kelliatroiano@gmail.com	✎
10615	Heather Kersey	Active	hkersey@gmail.com	✎
10601	Mike Kozlowski	Active	m.kozlowski08@gmail.com	✎
10578	Billy Holbrook	Active	bholbrook.pd@gmail.com	✎
10576	Don Krasnosky	Active	dk3637@gmail.com	✎

Add User

First Name * [text input]
Last Name * [text input]
Email * [text input]
Phone Number * [text input]
Address1 * [text input]
Address2 [text input]
City * [text input]
Zip / Postal Code * [text input]
State * -- Select -- [dropdown]
Role * -- Select -- [dropdown]

Make this user as inactive

Save Your User Cancel

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 on the edit icon corresponding to the user name.

User List

Add User

User Id	User Name	Status	Email	Action
10639	Kelli Troiano	Active	kelliatroiano@gmail.com	Click here
10615	Heather Kersey	Active	hkersey@gmail.com	
10601	Mike Kozlowski	Active	m.kozlowski08@gmail.com	

[Next: Settings](#)

[Previous:](#)

[Introduction to Settings](#)

SETTINGS

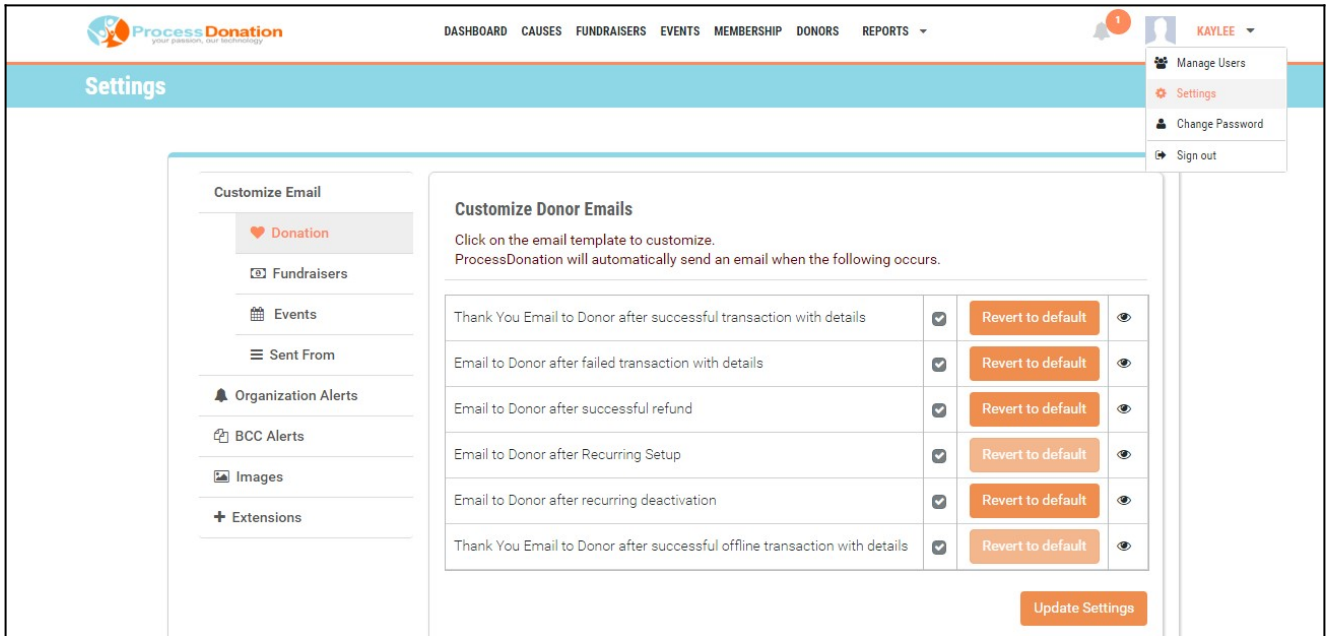
Customize Email

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:

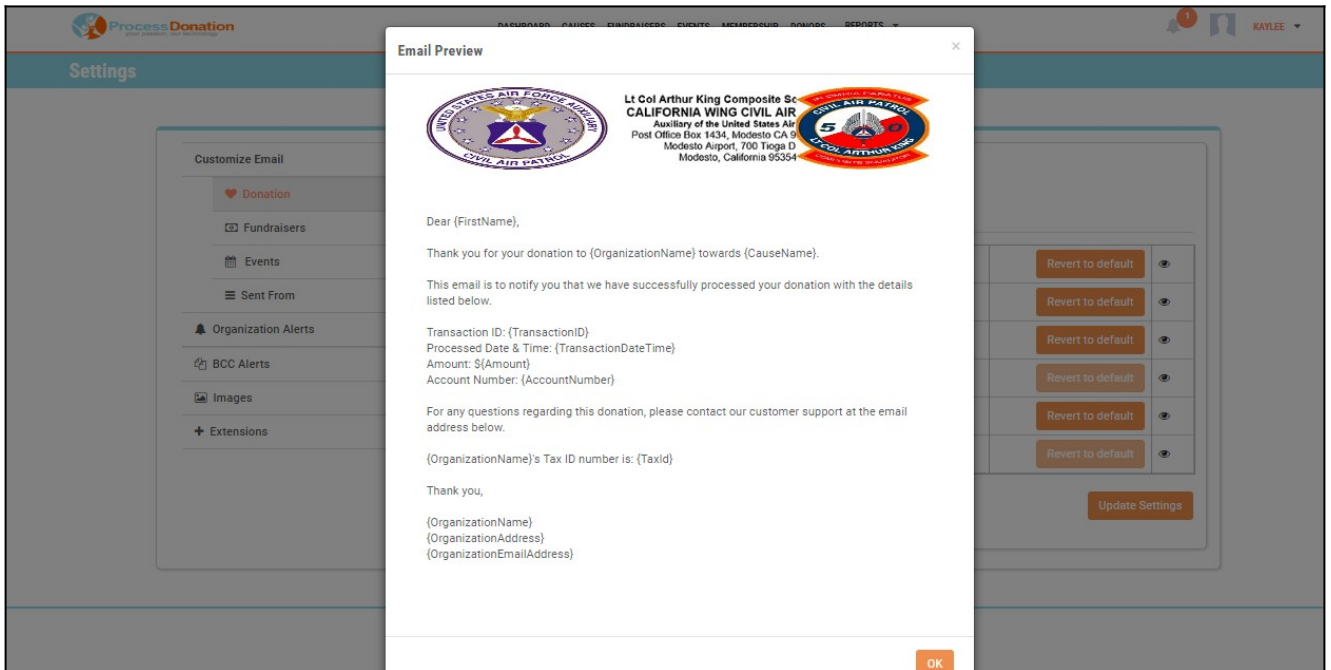
1. Customize the Email message by clicking on the email template name.
2. View a preview of the Email by clicking on the eyeball icon to the right.
3. Toggle auto delivery on or off by clicking on the check box.
4. Revert the Email template to the Process Donation default (for that particular action)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

Process Donation

DASHBOARD CAUSES FUNDRAISERS EVENTS MEMBERSHIP DONORS REPORTS

KAYLEE

Settings

Customize Email

- Donation
- Fundraisers
- Events
- Sent From
- Organization Alerts
- BCC Alerts
- Images
- Extensions

Customize Donor Emails

Click on the email template to customize.
ProcessDonation will automatically send an email when the following occurs.

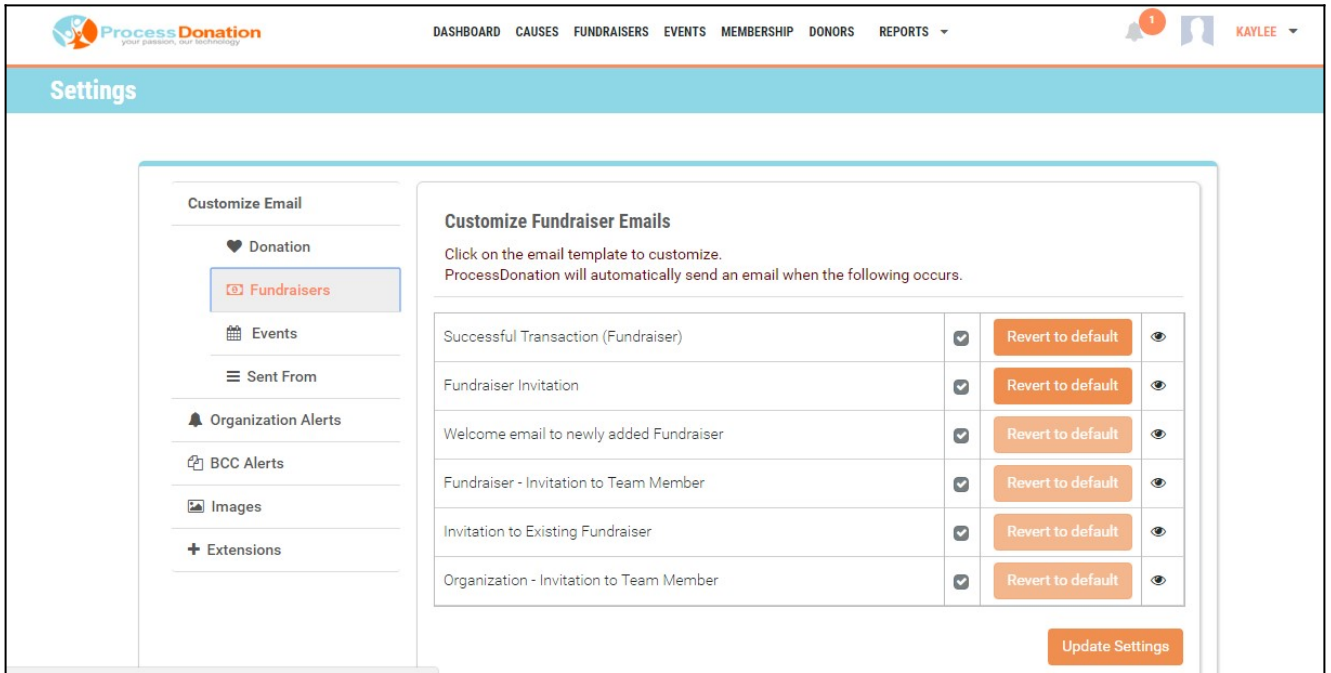
Thank You Email to Donor after successful transaction with details	<input checked="" type="checkbox"/>	Revert to default	👁
Email to Donor after failed transaction with details	<input checked="" type="checkbox"/>	Revert to default	👁
Email to Donor after successful refund	<input checked="" type="checkbox"/>	Revert to default	👁
Email to Donor after Recurring Setup	<input checked="" type="checkbox"/>	Revert to default	👁
Email to Donor after recurring deactivation	<input checked="" type="checkbox"/>	Revert to default	👁
Thank You Email to Donor after successful offline transaction with details	<input checked="" type="checkbox"/>	Revert to default	👁

[Click here](#) → [Update Settings](#)

Fundraisers

(Premium & Ultimate)

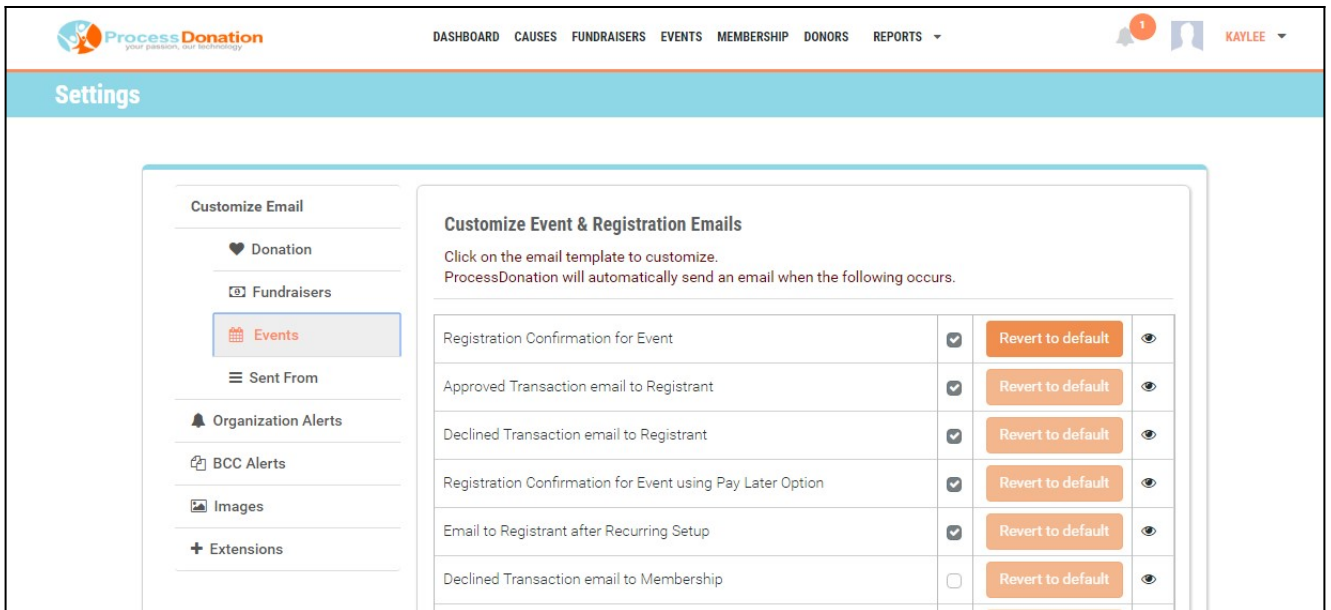
Just like the other sections, we provide default templates that can be used to share with your fundraisers, and we have templates that are relevant to different activities related to your Fundraisers.



Events

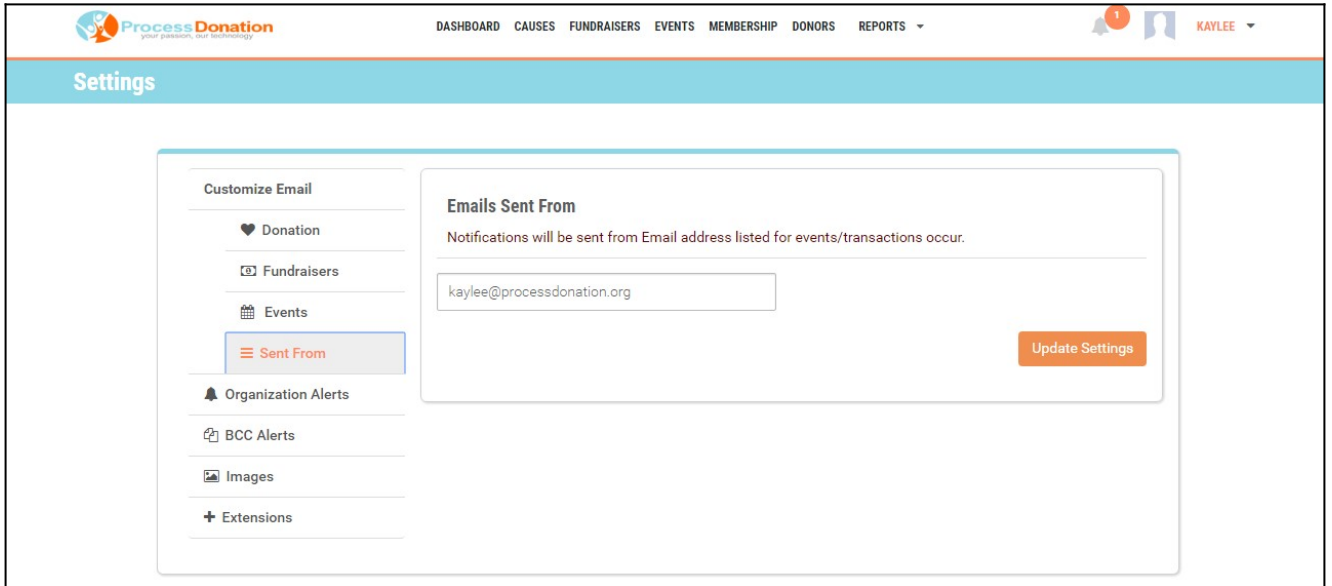
(Ultimate)

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



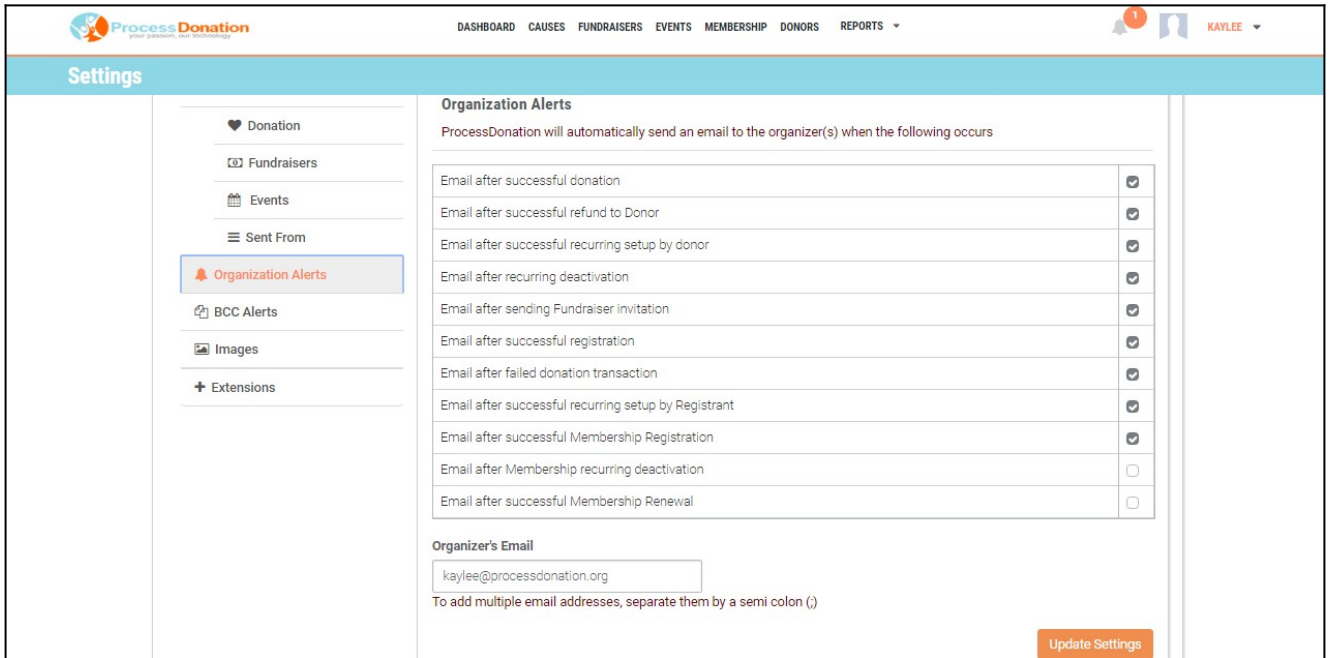
Sent from

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 (;).

The screenshot shows the 'Settings' page for Process Donation. The top navigation bar includes 'DASHBOARD', 'CAUSES', 'FUNDRAISERS', 'EVENTS', 'MEMBERSHIP', 'DONORS', and 'REPORTS'. The user's name 'KAYLEE' is visible in the top right. The left sidebar contains a menu with 'Customize Email' (sub-items: Donation, Fundraisers, Events, Sent From), 'Organization Alerts' (sub-item: BCC Alerts), 'Images', and 'Extensions'. The main content area is titled 'BCC Alerts' and contains a table of email alerts with checkboxes for enabling or disabling them. Below the table is a section for 'Organizer's Email' with a text input field containing 'kaylee@processdonation.org' and a note: 'To add multiple email addresses, separate them by a semi colon (;)'. An 'Update Settings' button is located at the bottom right of the settings area.

Alert Type	Enabled
Thank You Email to Donor after successful transaction with details	<input checked="" type="checkbox"/>
Email to Donor after failed transaction with details	<input checked="" type="checkbox"/>
Email to Donor after successful refund	<input checked="" type="checkbox"/>
Email to Donor after Recurring Setup	<input checked="" type="checkbox"/>
Successful Transaction (Fundraiser)	<input checked="" type="checkbox"/>
Fundraiser Invitation	<input checked="" type="checkbox"/>
Email to Donor after recurring deactivation	<input checked="" type="checkbox"/>
Registration Confirmation for Event	<input checked="" type="checkbox"/>
Approved Transaction email to Registrant	<input checked="" type="checkbox"/>
Declined Transaction email to Registrant	<input checked="" type="checkbox"/>
Registration Confirmation for Event using Pay Later Option	<input checked="" type="checkbox"/>
Email to Registrant after Recurring Setup	<input checked="" type="checkbox"/>
Welcome email to newly added Fundraiser	<input checked="" type="checkbox"/>
Fundraiser - Invitation to Team Member	<input checked="" type="checkbox"/>
Declined Transaction email to Membership	<input type="checkbox"/>
Approved Transaction email to Membership	<input type="checkbox"/>
Subscription Confirmation for Membership	<input type="checkbox"/>
Thank You Email to Donor after successful offline transaction with details	<input checked="" type="checkbox"/>
Invitation to Existing Fundraiser	<input checked="" type="checkbox"/>
Organization - Invitation to Team Member	<input checked="" type="checkbox"/>
Email to Member after recurring deactivation	<input type="checkbox"/>
Subscription Renewal Confirmation for Membership	<input type="checkbox"/>
Email Reminder For Membership Renewal	<input type="checkbox"/>
Approved Transaction email to Membership Renewal	<input type="checkbox"/>

Images

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

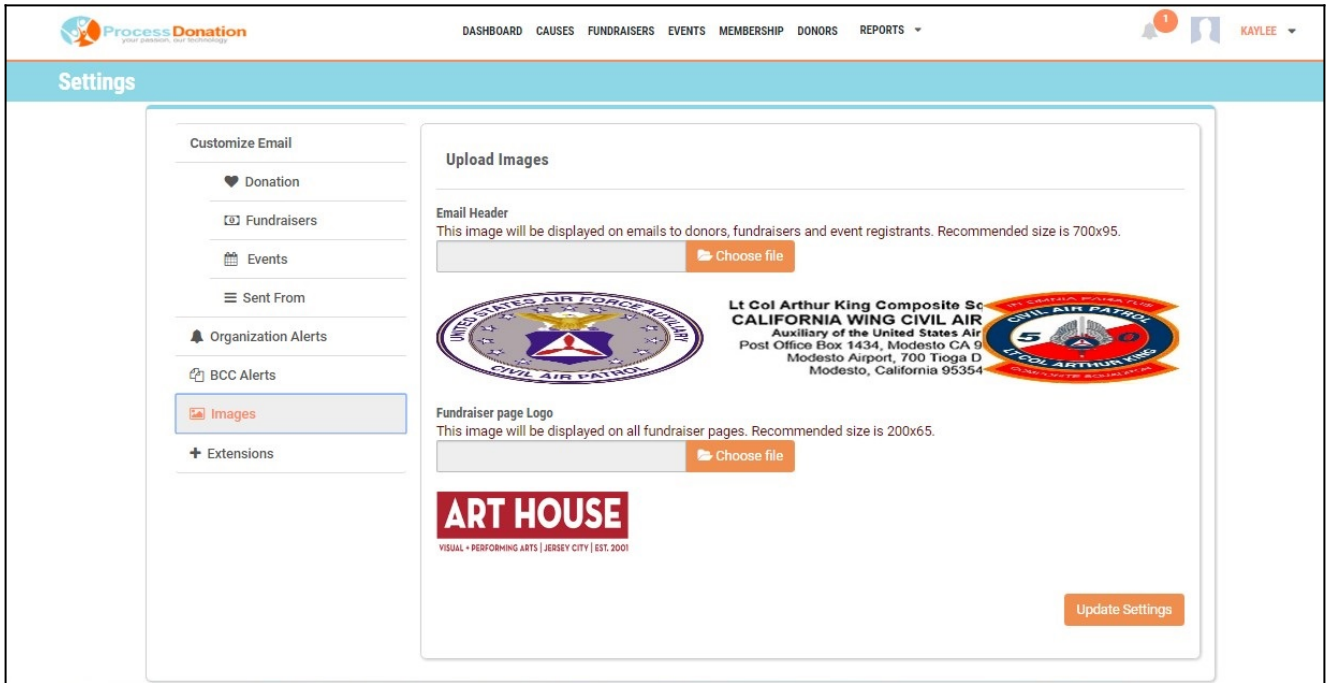
Email Header

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.

The screenshot shows the 'Settings' page in the Process Donation user interface. On the left is a sidebar menu with options: 'Customize Email', 'Donation', 'Fundraisers', 'Events', 'Sent From', 'Organization Alerts', 'BCC Alerts', 'Images', and '+ Extensions'. The main content area is titled 'Constant Contact' and features an orange 'Disconnect Constant Contact' button at the top. Below this is a descriptive sentence: 'By connecting your account, you can sync your supporters' contact information with your Constant Contact email lists.' There are three dropdown menus: 'Donors *' (set to 'ProcessDonation Contacts'), 'Fundraiser *' (set to 'ProcessDonation Contacts'), and 'Registrants *' (set to 'ProcessDonation Contacts'). Below these is a 'Quick Books' section with a 'CONNECT TO QuickBooks' button. The 'Double the Donation' section has a toggle switch set to 'On' and the text 'Disable Double the Donation'. The 'MailChimp' section has an orange 'Disconnect MailChimp' button and a descriptive sentence: 'With the ProcessDonation and MailChimp integration, you can import your supporters' contact information to your MailChimp account.' An orange 'Update Settings' button is located at the bottom right of the main content area. At the very bottom of the page, there is a copyright notice: '© 2014 - 2016 ProcessDonation. All rights reserved.'

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.

The screenshot shows the 'Change Password' page in the Process Donation system. The page header includes the Process Donation logo and navigation links: DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. The user's name, KAYLEE, is displayed in the top right corner. The main content area contains a form with three password input fields: 'Current Password*', 'New Password*', and 'Confirm Password*'. A 'Submit' button is located at the bottom right of the form. To the right of the form, a list of password requirements is displayed:

- ✓ Password between 6-14 characters
- ✓ At least one uppercase letter
- ✓ At least one lowercase letter
- ✓ At least one number
- ✓ At least one special character

At the bottom of the page, the copyright notice reads: © 2014 - 2016 ProcessDonation. All rights reserved.

[Previous: Settings](#)