# Scholarship & Donation Campaigns

## Section I: Configure Scholarship and Donation charges

### Lesson 1: Develop a scholarship charge

**Details:** Create a scholarship that takes funds from donations

* Add a new GL account and name it “Scholarships” with the account type, Income.
* Create a new Youth Scholarship Charge
  + Select the Scholarship Charge type with a prefill condition of always
  + Treat this scholarship as a payment and use donations to fund this scholarship
    - Note: Scholarships not linked to a donation can start with a fixed opening balance amount
  + The scholarship program is an annual program with 100% of the scholarship being applied to any enrollment
* *Tip: Administration > Financial Settings > Charges*

### Lesson 2: Select Activities that are applicable for the Scholarship

**Details:** Use global discounts to attach the scholarship to all activities

* Add a new Global Discount
  + Name it Youth Scholarship and select the previously scholarship as the charge
  + Apply this scholarship to all activities
* *Tip: Administration > Financial Settings > Charges*

### Lesson 3: Create the Donation campaign to fund the scholarship

**Details:** Create a fund for your youth scholarship

* Enter a description that promotes the fund, including a start and end date for the fundraising campaign.
* Enter a goal for $10,000 for the campaign with all funds directed to the Youth Scholarship
* Allow online donations and accept recurring payments
* Allow custom donation amounts and set up fixed amounts of $100 and $200
* *Tip: Administration > Campaign Settings > Campaigns*

## Section II: End User Training

### Lesson 1: Make a Donation

**Details:** Make a donation into the Youth Scholarship Fund

* Select your local celebrity as the donor
* Select the campaign fund and donate $500
* Make this a re-occurring monthly donation for 6 months
* *Tip: Front Desk > Donations > Make Donation*

### Lesson 2: Distribute scholarship to a customer

**Details:** Give a $200 scholarship to your favourite musician’s child. Scholarships do not become an account balance/credit, but it allows the customer to use

* Navigate to the customer functions account and select customer scholarships
* Add a new scholarship to the customer account with an amount of $200
* Enroll the customer into an activity and use the scholarship to pay for the entire activity
* *Tip: Front Desk > Population > Customers*

## Section III: Public Access

### Lesson 1: Make an online donation

**Details:** Using the public access site, make a donation to the youth scholarship fund

* Login to your online account and make a recurring $400 donation
* Select and appropriate frequency and duration
* Proceed throughout the checkout process and complete the donation
* *Tip: Public Access Site > Donations*

### Lesson 2: Enroll in an activity with a scholarship online

**Details:** Using the public access site, make enroll your favourite musician child

* Login with the child’s account through the “Access My account” link on their customer functions page
* Note: if the system does not allow you to access their account, you may need to create a login & password for them in their customer details page
* Enroll the participant in an activity and use the scholarship
* *Tip: Public Access Site > Activities*

## Section IV: Reports

### Lesson 1: Scholarship Report

**Details:** Run the scholarships report

* Filter the report to include the Youth Scholarship
* Note: This report is processed to understand the current balance and recipients of the scholarship.
* *Tip: Reports > Financial Reports > Scholarship*

### Lesson 2: Donations Report

**Details:** Create a donors list and run the donations report

* Create a new customer list called Donors and filter the list to include donors for the Youth Scholarship.
* Note: Include customers who selected “No Promotional E-mail” and “No Promotional Postal Mail”
* Include Drop-In Customer Donation and run the Donation report
* *Tip: Reports > Campaign Reports > Donation*