

Process Donation User Guide

User Manual



Created: Friday, May 19, 2017

Copyright © processdonation. All Rights Reserved.

Help Site

copyright © processdonation. All rights reserved.
<http://processdonation.helpdocsonline.com/>

The information contained in this document is subject to change without notice.
This document contains proprietary information which is protected by copyright.
All rights are reserved. No part of this document may be photocopied, reproduced,
or translated to another language without the prior written consent of processdonation.

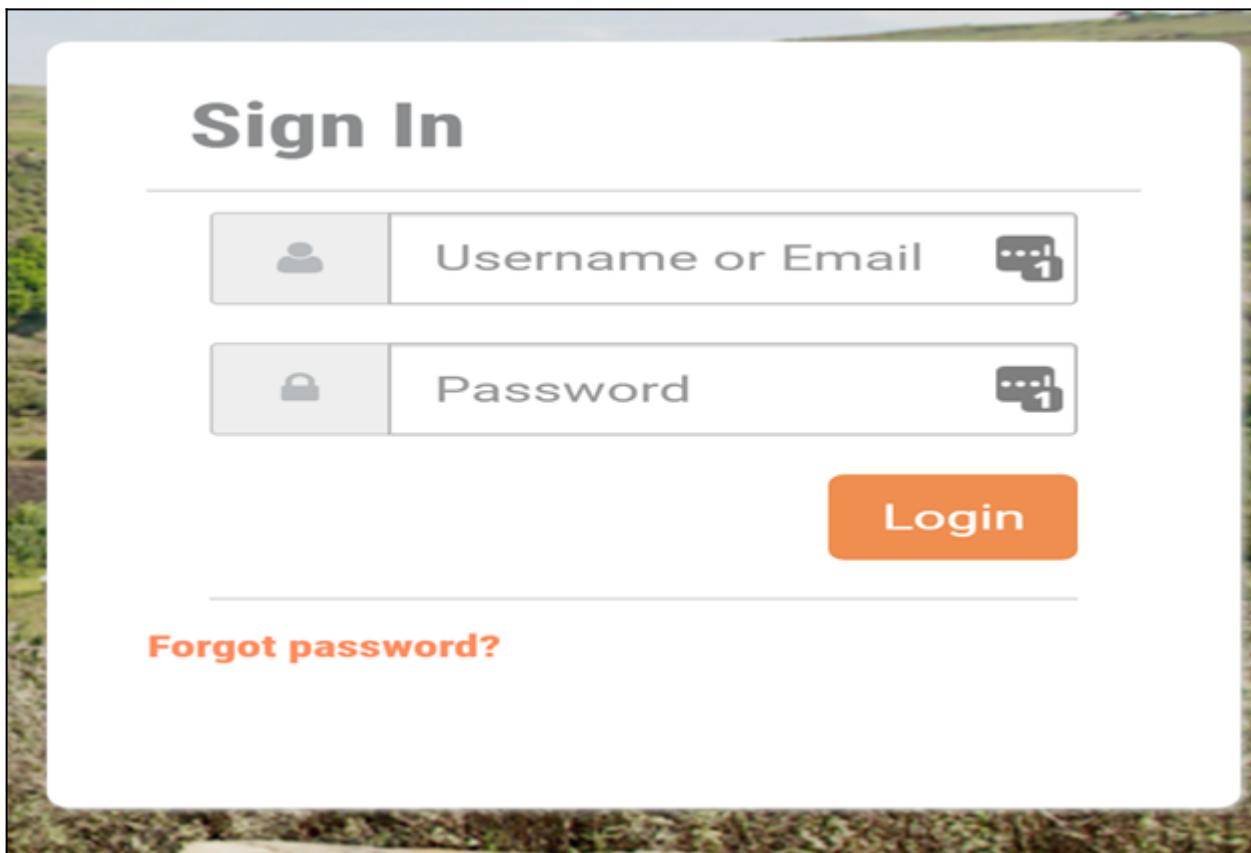
Table of Contents

Getting Started	1
Home	1
Logging On & Link Payments Page	1
Navigation Menu	3
Dashboard	5
Introduction to Dashboard	5
Causes	7
Introduction to Causes	7
Create / Edit a Cause	8
Create a Campaign	11
Custom Donation Page	17
Fundraisers	18
Introduction to Fundraisers	18
Invite Fundraisers	21
Create a Fundraiser Page	25
Setting Up a Goal	26
Upload Pictures and Videos	28
Fundraiser Description	30
Setup Giving Levels	31
Create and Manage Teams	33
Manage Fundraiser Page	36
Add Offline Donations	39
Events	41
Introduction to Events	41
Design a Custom Events Template	43
Create an Event	44
Setup Event Details	46
Add Tickets	51
Buyer / Attendee Info & Custom Questions	55
Link the Event Page to Your Website	66
Create / Manage Promo Codes for Events	67
Manage an Event	70
Deactivate an Event	71
Membership	72
Introduction to Memberships	72
Design a Custom Membership Template	73
Create a Membership Form	74
Setup Membership Details	75
Add Membership Levels	77
Request Member Information	79

Link Membership Form to Your Website	81
Manage a Membership Form	82
Deactivate a Membership Form	83
Create / Manage Promo Codes for Memberships	85
Donors	87
Donor	87
Add Donor	89
Manage Donor	92
Reports	100
Donation History	100
Recurring Donations	102
Donation Summary	104
Year End Tax Letter	105
Email History	106
Account Statement	107
Report Export and Filters	109
Settings	110
Introduction to Settings	110
Manage Users	111
Settings	113
Change Password	124

LOGGING ON

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



If you click on the **Forgot Password?** link, a password reset email will be sent to your email address. If you do not receive one promptly from us 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 & Ultmate)

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)

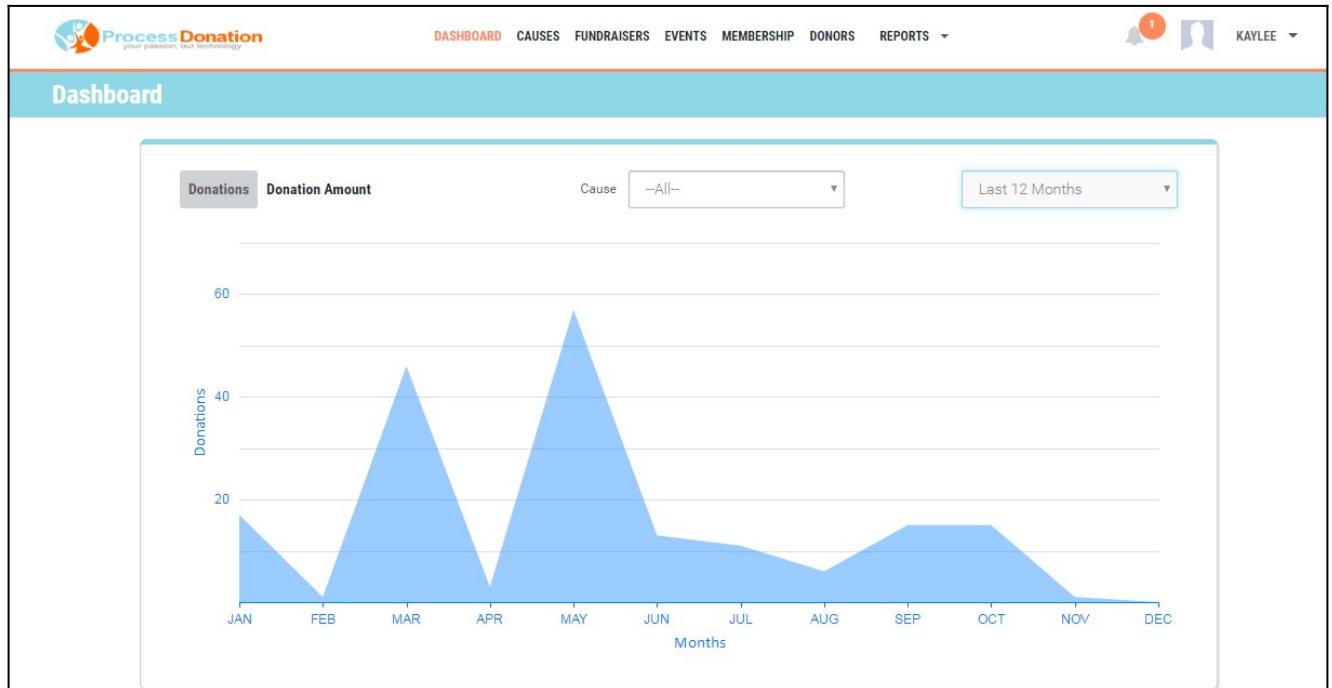
Reports - allows you to track email, manage your IRS letter obligations, and reports on your financial transactions. (Standard & Premium/limited access, Ultimate/full access)

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)

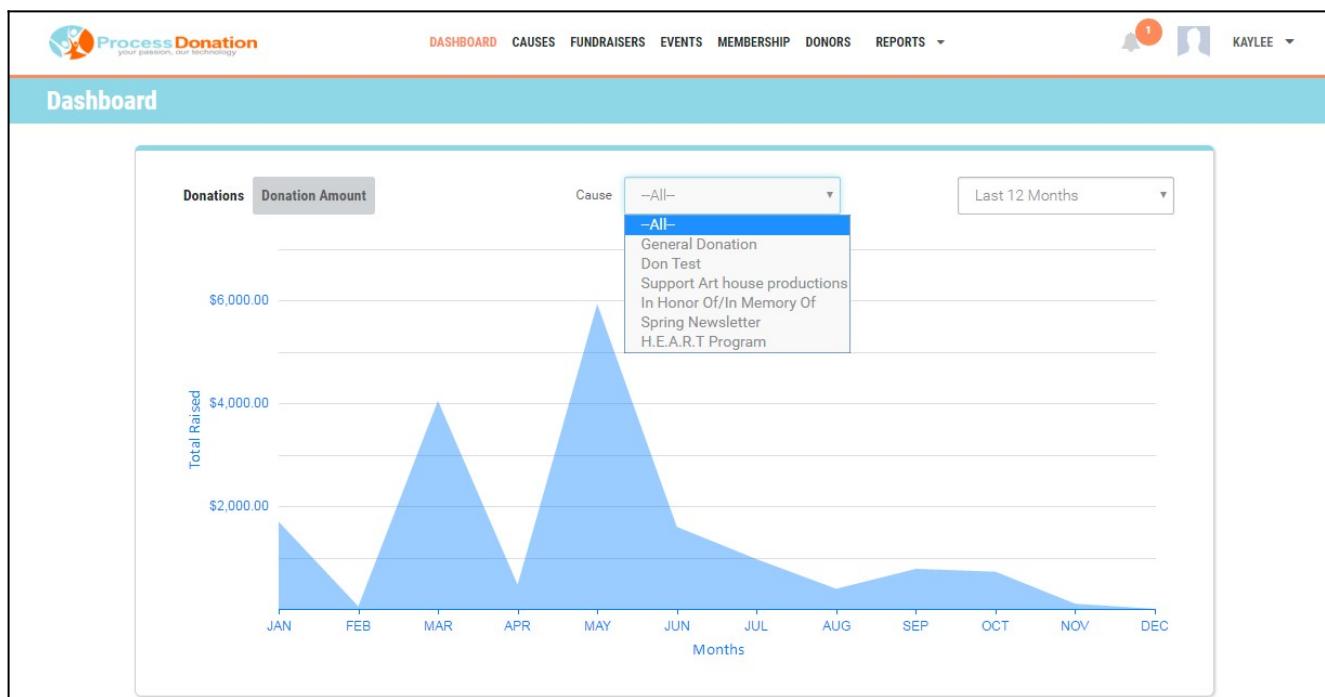
INTRODUCTION TO DASHBOARD

(Standard, Premium, & Ultimate)

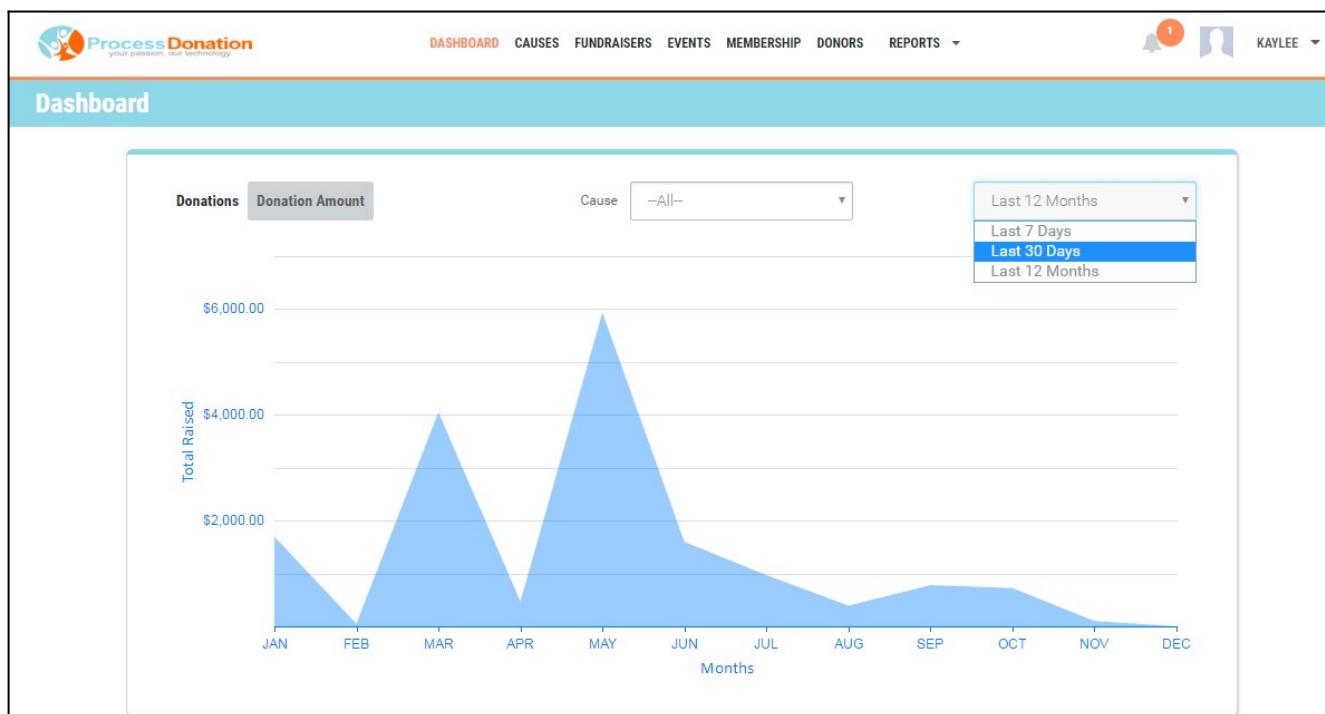
Dashboard is the landing page when you log on and is designed to give you the ability to see a pictorial view of the number of donations and total amount raised.



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:



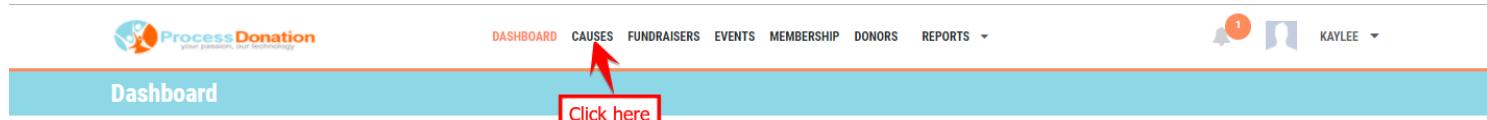
NEXT: Causes

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.

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	

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 'Cause List' page of the Process Donation software. At the top right, there is a user profile for 'KAYLEE'. Below the header, there are tabs for 'DASHBOARD', 'CAUSES' (which is highlighted in orange), 'FUNDRAISERS', 'EVENTS', 'MEMBERSHIP', 'DONORS', and 'REPORTS'. The main area is titled 'Cause List' and contains a table with the following data:

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	

A red box highlights the 'Create Cause' button at the top right of the table, with a red arrow pointing to it from the left.

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.

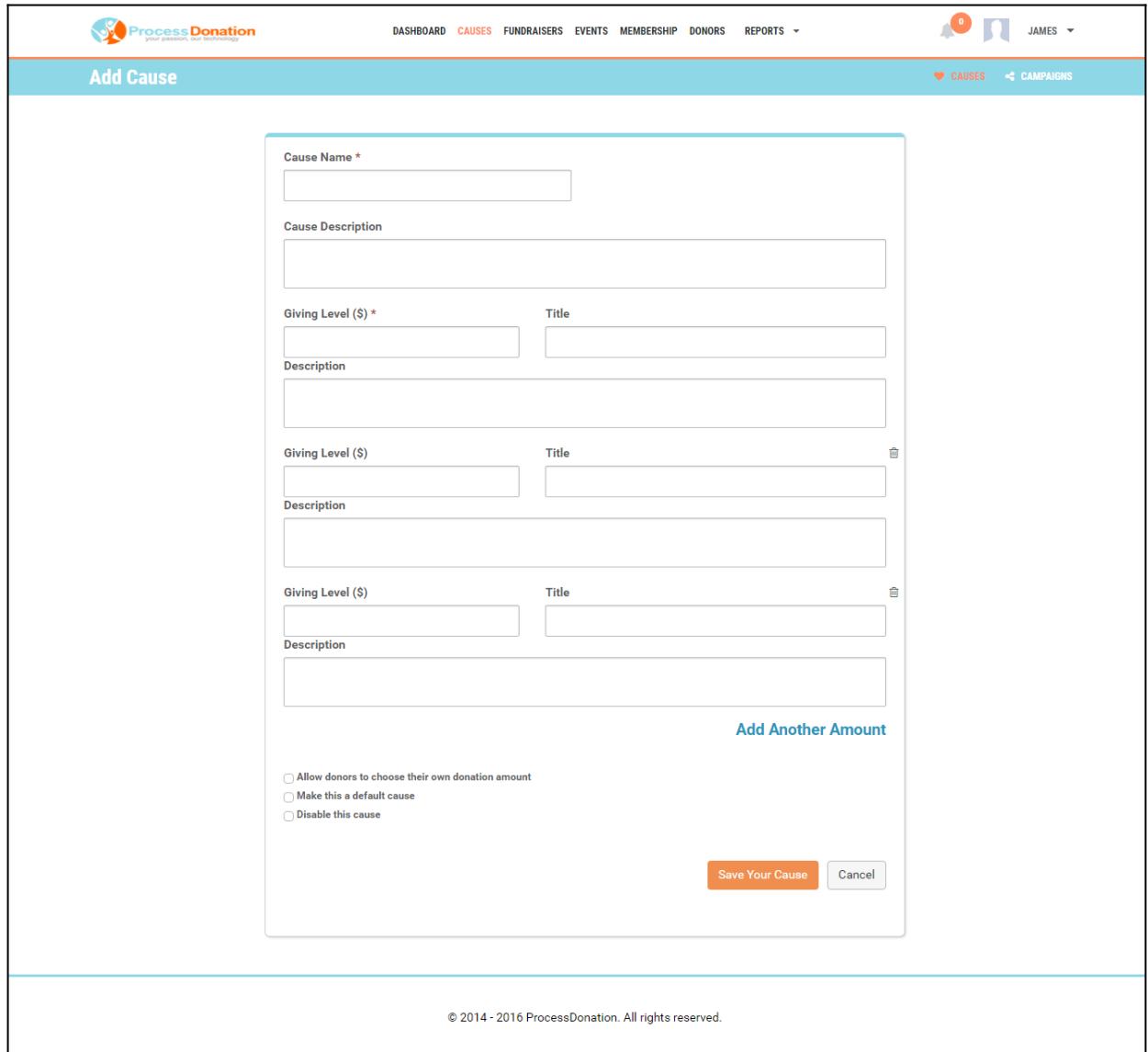
Additionally, you have the following options that you can manage at the Cause level (all Causes do not have to be treated the same):

[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' page of the Process Donation software. At the top, there's a navigation bar with links for DASHBOARD, CAUSES (which is highlighted in red), FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. On the far right, there are icons for notifications (0), user profile (JAMES), and campaign management.

The main content area is titled 'Add Cause'. It contains three identical sections for creating causes:

- Cause Name ***: A text input field.
- Cause Description**: A text input field.
- Giving Level (\$)**: A text input field.
- Title**: A text input field.
- Description**: A text input field.

Below these sections, there are three more rows of the same fields, each preceded by a small edit icon (pencil symbol).

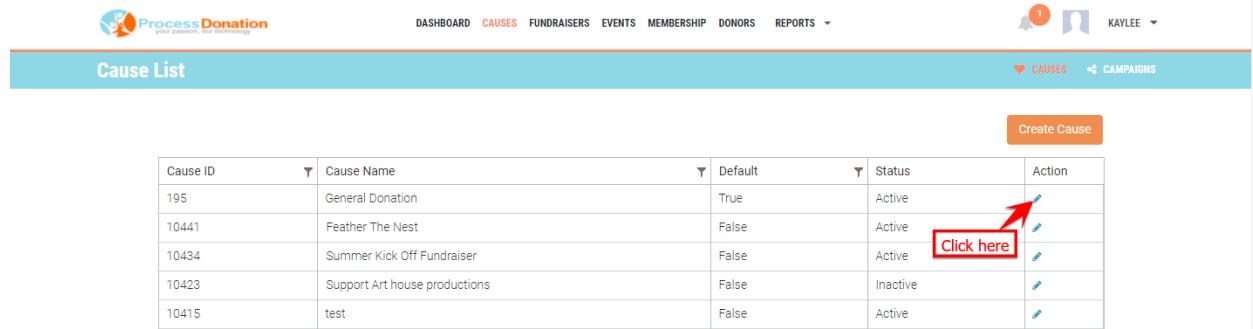
At the bottom of the form, there are three checkboxes:

- Allow donors to choose their own donation amount
- Make this a default cause
- Disable this cause

On the right side of the bottom section are two buttons: a blue 'Save Your Cause' button and a grey 'Cancel' button.

At the very bottom of the page, a footer note reads: © 2014 - 2016 ProcessDonation. All rights reserved.

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.



The screenshot shows the 'Cause List' page of the Process Donation software. At the top, there's a navigation bar with links for DASHBOARD, CAUSES (which is highlighted in orange), FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. On the right side of the header, there are user profile icons and a dropdown menu for 'KAYLEE'. Below the header, a teal bar displays 'Cause List' and 'Create Cause' buttons. The main area is a table with columns: Cause ID, Cause Name, Default, Status, and Action. The table contains five rows of data. A red box highlights the 'Action' column of the second row, which contains a blue pencil icon. An arrow points from this red box to the text 'Click here'.

Cause ID	Cause Name	Default	Status	Action
195	General Donation	True	Active	
10441	Feather The Nest	False	Active	
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:

Email

Spread the word of your cause by starting your campaign today! Upload a list or email your existing donors.

Compose

Campaign Name *

Cause *

Subject *

Recipients *

Body *

Dear {First_Name},
 Greeting from {Organization_Name}!
 {Organization_Name} can only achieve its goal with the assistance of generous donations for {Cause_Name}.
 Since our organization relies on the generosity of individuals like you, we write to ask you to consider a donation
 to {Cause_Name}. We hope that you will help support our efforts.
 Please consider giving for your generous donation.
 If you have any questions or concerns in the meantime, please feel free to contact us through phone or email
 provided below.
 Thank you in advance for your generosity.
 Kind Regards,
 {Organization_Name},
 {Organization_Address},
 {Organization_Phone},
 {Organization_Email}.

Email

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

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

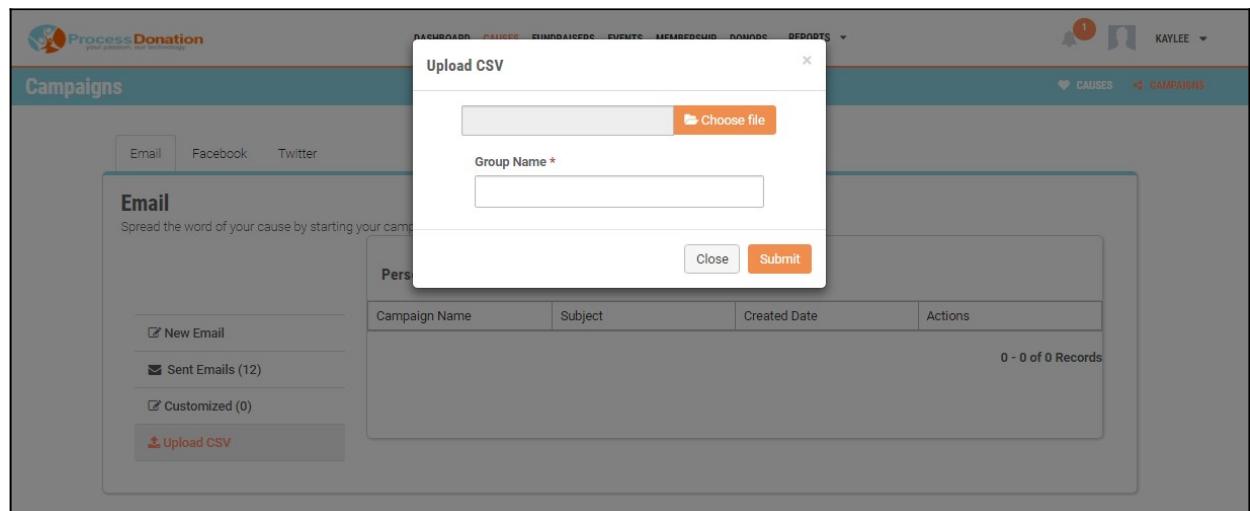
 When you click on [Send Email](#) your message will be delivered to your Recipients.

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

Recipients - You may enter in any email address and separate out multiple email addresses by a comma. Or you can import Recipients via our Upload CSV 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).

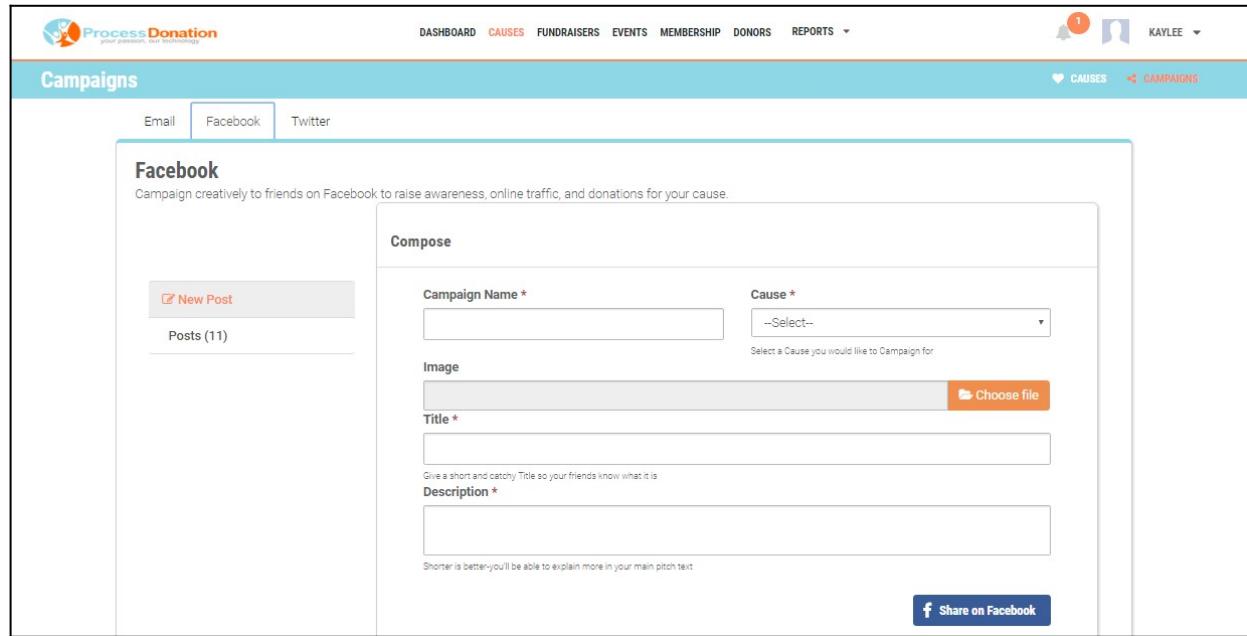
The screenshot shows the Process Donation software's 'Email' section. On the left, there is a sidebar with options like 'Email', 'Facebook', and 'Twitter'. The main area has a heading 'Email' and a sub-instruction 'Spread the word of your cause by starting your campaign today! Upload a list or email your existing donors.' Below this, there is a table titled 'Sent emails / 12'. The table has columns for 'Campaign Name', 'To', 'Subject', 'Sent Date', and 'Copy'. The data in the table includes:

Campaign Name	To	Subject	Sent Date	Copy
Support Our Kids	kaylee@processdonation.org,kayl...	Please Help Send Our...	06/30/2016 12:47PM	
We Need Your Help	kaylee@processdonation.org	Please Support	06/30/2016 12:17PM	
Thank You For Your S...	kaylee@processdonation.org	Thank You Supporters!	06/20/2016 12:34PM	
Summertime Is Here!	e_Toys For Tots;	Please Support Our S...	06/20/2016 12:32PM	
Campaign Name	kayleeburhn@rocketmail.com	Please Support!	05/17/2016 2:01PM	
Test Campaign	sdama@connexinfo.com	Test Email	01/31/2016 10:33PM	
Kids Korner Krafts	kaylee@processdonation.org	Help me please	11/17/2015 10:59AM	

Facebook

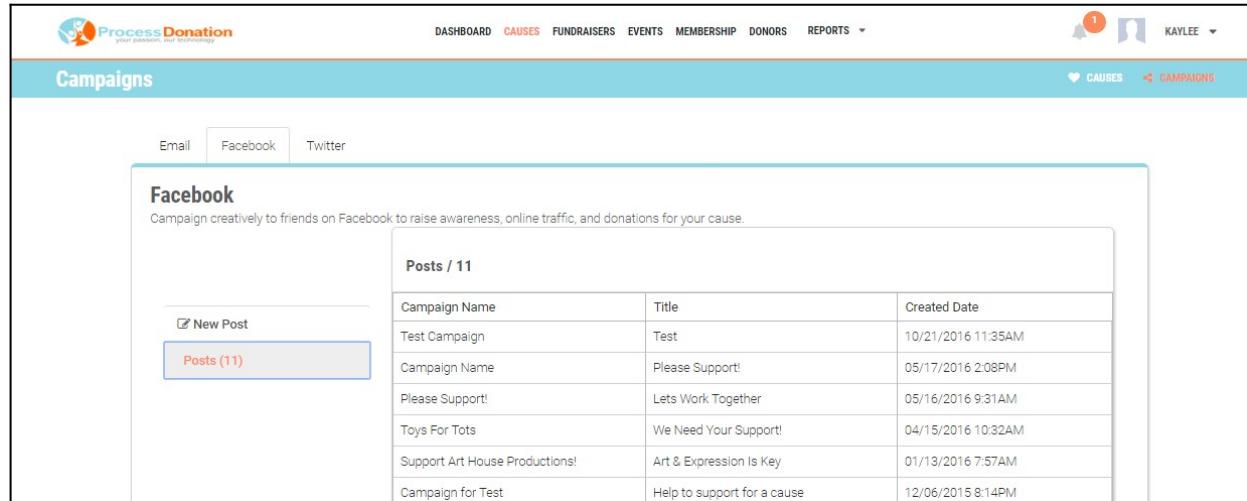
On the page below you will be able to assign the Facebook post a Campaign Name (that you can re-use on Email and Twitter) for tracking of your communication strategy. Select a Cause from the drop down to assign the Campaign to, include a Title line, a description of your Cause and Campaign goals, and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

When you click on  **Share on Facebook** 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.



The screenshot shows the 'Compose' section for a Facebook campaign. It includes fields for 'Campaign Name *' (with a placeholder 'New Post'), 'Cause *' (with a dropdown menu labeled 'Select...'), 'Image' (with a file upload button 'Choose file'), 'Title *' (with a placeholder 'Give a short and catchy Title so your friends know what it is'), and 'Description *' (with a placeholder 'Shorter is better—you'll be able to explain more in your main pitch text'). At the bottom right is a blue button with the text 'Share on Facebook'.

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.



Posts / 11		
Campaign Name	Title	Created Date
Test Campaign	Test	10/21/2016 11:35AM
Campaign Name	Please Support!	05/17/2016 2:08PM
Please Support!	Lets Work Together	05/16/2016 9:31AM
Toys For Tots	We Need Your Support!	04/15/2016 10:32AM
Support Art House Productions!	Art & Expression Is Key	01/13/2016 7:57AM
Campaign for Test	Help to support for a cause	12/06/2015 8:14PM

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.

The screenshot shows the 'Campaigns' section of the Process Donation portal. At the top, there are navigation links: DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. On the right, there are notifications (1), a profile icon for 'KAYLEE', and links for 'CAUSES' and 'CAMPAIGNS'. Below the navigation, the 'Campaigns' tab is selected. Underneath it, there are three buttons: Email, Facebook, and Twitter, with Twitter being the active tab. The main area is titled 'Twitter' and contains instructions: 'Tweet creatively to raise awareness, online traffic, and donations for your cause.' On the left, there's a 'New Tweet' button and a link to 'Tweets (0)'. On the right, there's a 'Compose' form with fields for 'Campaign Name *' (with a placeholder 'Select...'), 'Cause *' (placeholder 'Select a Cause you would like to Campaign for'), 'Title *' (placeholder 'Give a short and catchy Title so your friends know what it is'), and 'Description *' (placeholder 'Shorter is better--you'll be able to explain more in your main pitch text'). A 'Share on Twitter' button is at the bottom right of the form.

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.

The screenshot shows the 'Campaigns' section of the Process Donation portal. The layout is identical to the previous screenshot, with the same navigation and tabs. The 'Twitter' section is active, showing a summary: 'Tweets / 0'. Below this, there's a table with columns for 'Campaign Name', 'Title', and 'Created Date'. A note at the bottom right says '0 - 0 of 0 Records'. On the left, there's a 'New Tweet' button and a link to 'Tweets (0)'.

[**NEXT: DESIGN A CUSTOM DONATION PAGE**](#)

[**CREATE / EDIT A CAUSE**](#)

[**PREVIOUS:**](#)

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**](#)

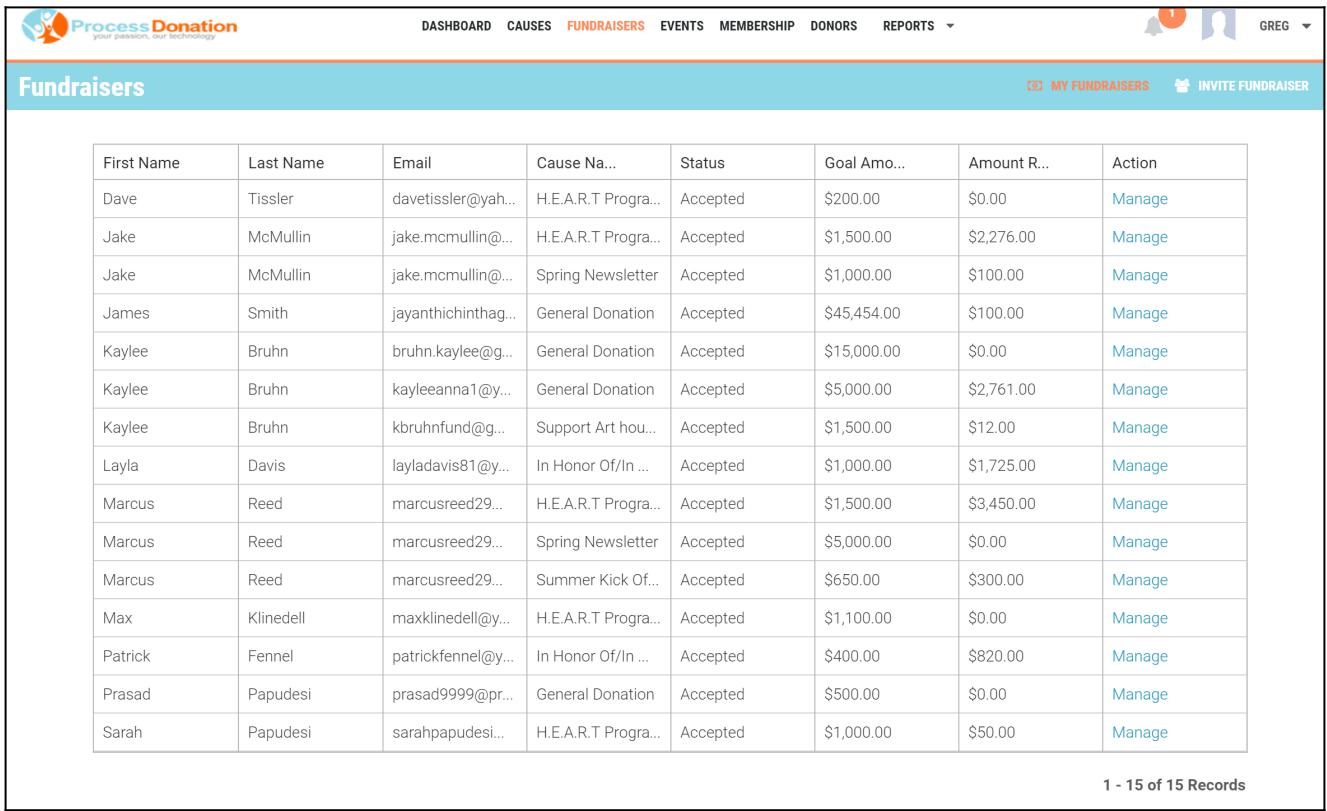
INTRODUCTION TO FUNDRAISERS

(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 a web application interface for managing fundraisers. At the top, there's a navigation bar with links for Dashboard, Causes, Fundraisers (which is highlighted in orange), Events, Membership, Donors, and Reports. On the far right of the top bar, there are icons for notifications (with a red badge), user profile (Greg), and settings. Below the navigation bar, a blue header bar says "Fundraisers". Underneath it is a table with 15 rows of data. The columns are: First Name, Last Name, Email, Cause Na..., Status, Goal Amo..., Amount R..., and Action. Each row contains a "Manage" link in the last column. At the bottom of the table, it says "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	kayleeanna1@y...	General Donation	Accepted	\$5,000.00	\$2,761.00	Manage
Kaylee	Bruhn	kbruhrnfund@g...	Support Art hou...	Accepted	\$1,500.00	\$12.00	Manage
Layla	Davis	layladavis81@y...	In Honor Of/In ...	Accepted	\$1,000.00	\$1,725.00	Manage
Marcus	Reed	marcusreed29...	H.E.A.R.T Progra...	Accepted	\$1,500.00	\$3,450.00	Manage
Marcus	Reed	marcusreed29...	Spring Newsletter	Accepted	\$5,000.00	\$0.00	Manage
Marcus	Reed	marcusreed29...	Summer Kick Of...	Accepted	\$650.00	\$300.00	Manage
Max	Klinedell	maxklinedell@y...	H.E.A.R.T Progra...	Accepted	\$1,100.00	\$0.00	Manage
Patrick	Fennel	patrickfennel@y...	In Honor Of/In ...	Accepted	\$400.00	\$820.00	Manage
Prasad	Papudesi	prasad9999@pr...	General Donation	Accepted	\$500.00	\$0.00	Manage
Sarah	Papudesi	sarahpapudesi...	H.E.A.R.T Progra...	Accepted	\$1,000.00	\$50.00	Manage

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

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](#)

Teams [View All](#)

Team	Progress	Action
Summer Art Program	\$0 / \$1,500	Join
Voices of Change	\$1,565 / \$2,000	Join

4 Shares

f 4 **0** **g+ 0**

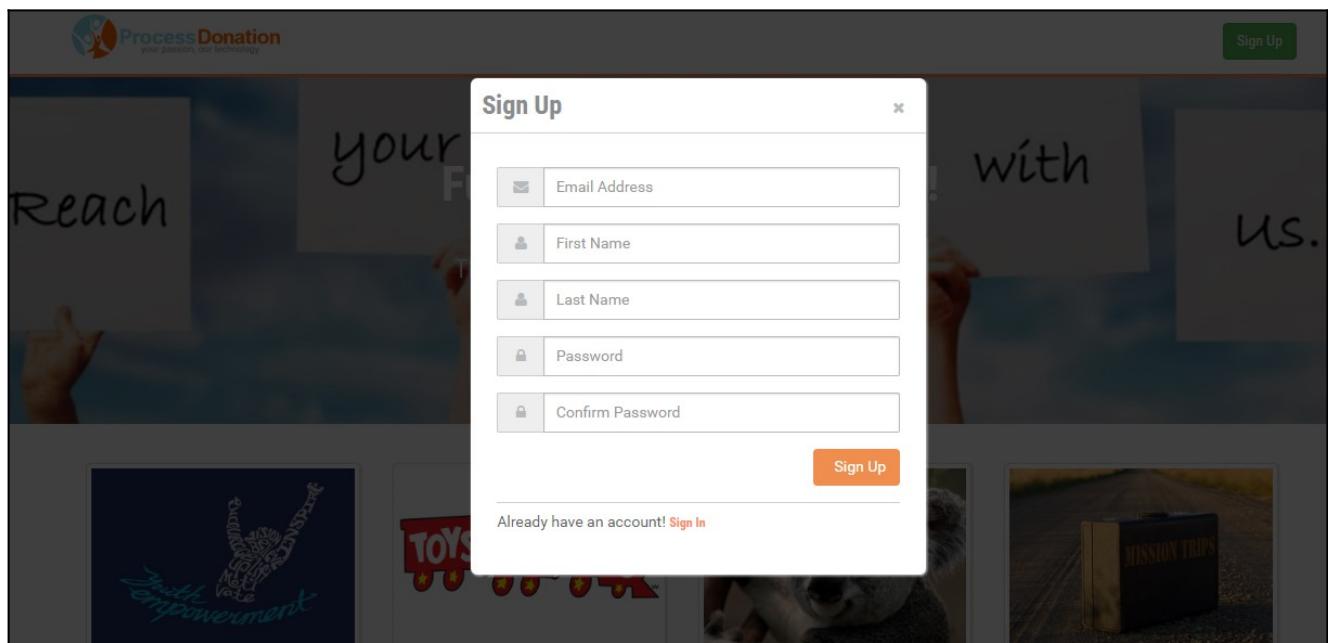
Update #1 **11 months ago**

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.

NEXT: INVITE FUNDRAISERS

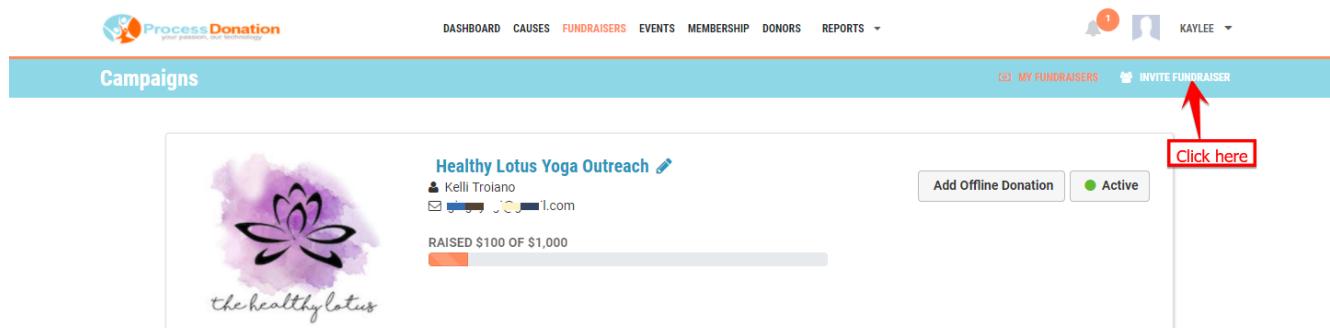
INVITE FUNDRAISERS

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:



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**](#)

[**GOAL**](#)

[**NEXT: SETTING UP A**](#)

SETTING UP A GOAL

Your Fundraiser can begin customizing their Campaign.

The screenshot shows the 'Process Donation' website interface. At the top, there's a navigation bar with 'CREATE CAMPAIGN' and 'VIEW CAMPAIGN' buttons, and a user profile for 'KAYLEE'. The main content area has a light blue header bar with the text 'Hi Steve, Enter your Goal, Title' and a small arrow icon. Below this, there are several input fields and options:

- Cause ***: A dropdown menu labeled 'Choose Cause'.
- Campaign Title ***: An input field for the campaign title.
- Goal Amount ***: An input field with a '\$' sign and a numeric keypad, next to a date picker labeled 'End Date *'.
- Zip / Postal code ***: An input field with 'City:' and 'State:' dropdowns.
- Pick Your Theme**: A row of colored squares (green, blue, orange, red, purple, light blue, light green, yellow, pink, brown, grey) for selecting a theme color.
- Save & Continue**: An orange button at the bottom right of the form.

A sidebar on the left contains links: 'Goal, Title & Theme' (which is selected), 'Photo or Video', 'Description', 'Giving Levels', and 'Create a Team'.

- Cause** - They can choose from any one Cause that you invited them to assist you in raising awareness and funds.
- Campaign Title** - A title for the Fundraiser page
- Goal Amount** - The Fundraiser sets a goal amount that they are seeking to raise on your behalf
- End Date** - Set the end date for their involvement in your campaign
- Zip / Postal code** - This is a field that will accept a postal code and automatically populate the City and State fields
- 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

The screenshot shows a user interface for adding media to a campaign. On the left, there's a sidebar with options: Goal, Title & Theme (checkbox), Photo or Video (button), Description (button), Giving Levels (button), and Create a Team (button). The main area has a title 'Add / Edit your photo or video' with a curved arrow icon. It includes instructions: 'Add up to 4 Pictures and 2 Videos (Minimum of 600 pixels wide by 400 pixels tall)'. Below this is a note: 'Images are worth a thousand words and also will increase the number of donations you receive so do consider adding at least one video or photo!'. There are two buttons: 'UPLOAD IMAGE' with a camera icon and 'YOUTUBE VIDEO' with a video camera icon. At the bottom are 'Back' and 'Save & Continue' buttons.

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

This screenshot shows a 'Add Video' modal window. Inside, there's a 'Video URL' input field with placeholder text 'Copy and paste YouTube URL'. At the bottom right of the modal are 'Close' and 'Add Video' buttons. The background of the main page is dimmed. The main page features the same sidebar and central instructions as the previous screenshot, along with 'UPLOAD IMAGE' and 'YOUTUBE VIDEO' buttons at the bottom.

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 shows the 'Fundraiser Description' section of the Process Donation platform. At the top, there's a navigation bar with the Process Donation logo, 'CREATE CAMPAIGN', 'VIEW CAMPAIGN', and a user profile for 'KAYLEE'. On the left, a sidebar lists options: 'Goal, Title & Theme' (selected), 'Photo or Video', 'Description', 'Giving Levels', and 'Create a Team'. The main area has a title 'Tell your story' with a red arrow pointing to it. Below it is a text editor with a toolbar for 'Bold', 'Italic', 'Under line', and 'Link'. A placeholder text 'What are you fundraising for?*' is present. Underneath is a 'Customize Your URL (Optional)' field containing a placeholder URL 'http://fundraiser.helpadesi.com/Fundraiser/'. There's also a checkbox for 'Set "Monthly Recurring" as the default giving option'. At the bottom are 'Back' and 'Save & Continue' buttons.

- 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.

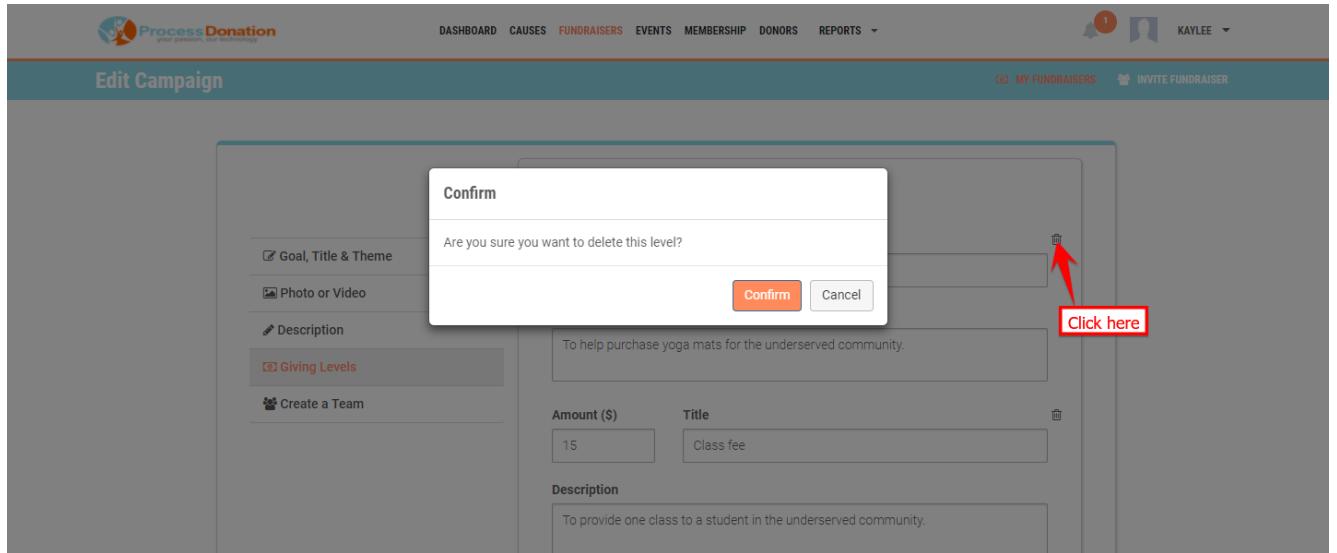
The screenshot shows a web interface for managing giving levels. On the left, there's a sidebar with options: Goal, Title & Theme, Photo or Video, Description, Giving Levels (which is selected and highlighted in red), and Create a Team. The main content area is titled 'Giving Levels' and contains three entries:

Amount (\$)	Title
2	
3	
4	

Each entry has a 'Description' field below it, containing 'desc 1', 'desc 2', and an empty field respectively. At the bottom of the list is a link 'Add Another Giving Level'. Below the list is a checkbox 'Allow donors to choose their own donation amount'. At the very bottom are 'Back' and 'Save & Continue' buttons.

- Amount** - Enter the dollar amount for the Giving Level
- Title** - Here they can give a title to the Giving level
- Description** - They may leave a brief note for this Giving Level
- 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

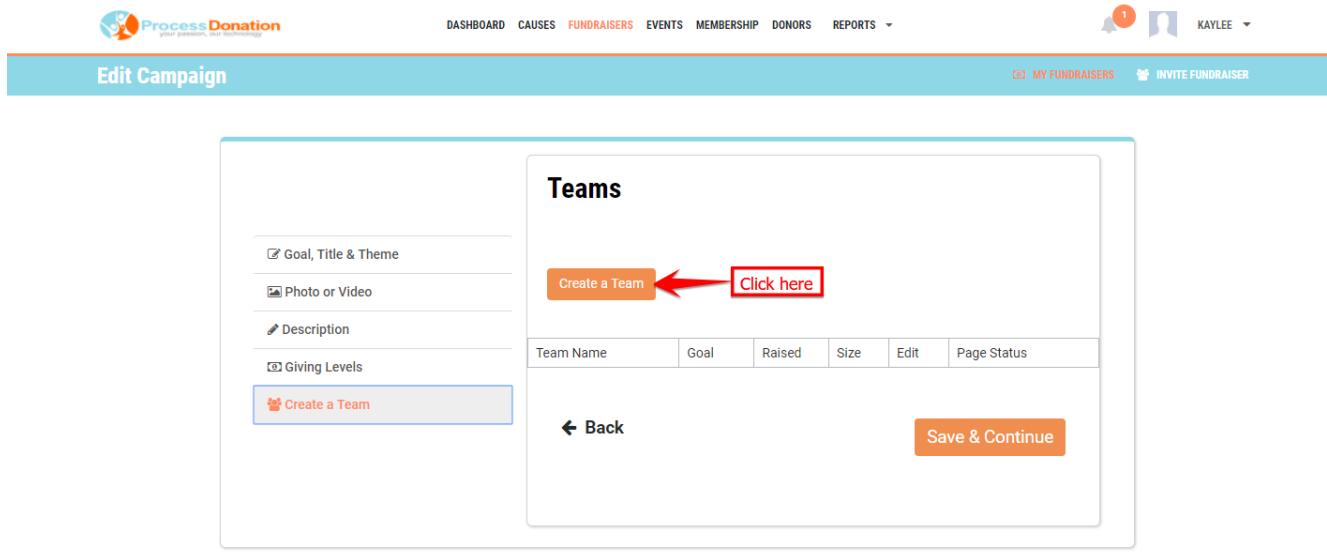
[**PREVIOUS: FUNDRAISER DESCRIPTION**](#)

[**CREATE AND MANAGE TEAMS**](#)

[**NEXT:**](#)

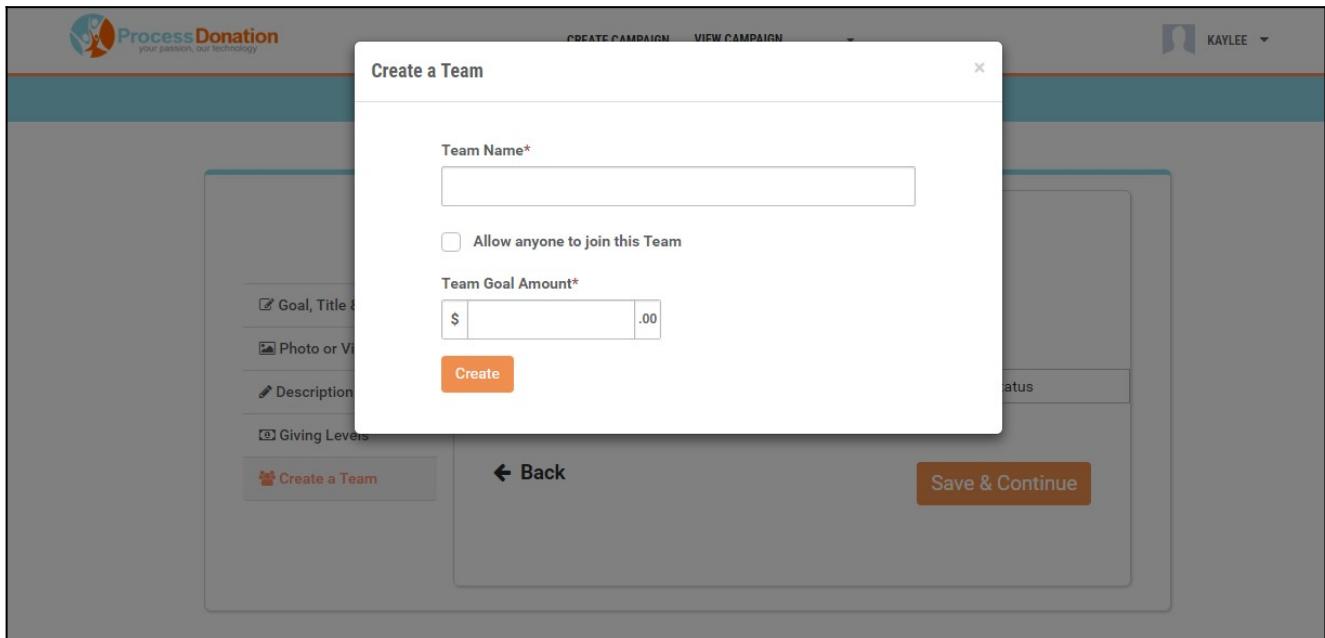
CREATE AND MANAGE TEAMS

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.



The screenshot shows the 'Edit Campaign' interface. On the left, there's a sidebar with options like 'Goal, Title & Theme', 'Photo or Video', 'Description', and 'Giving Levels'. Below these is a blue button labeled 'Create a Team'. The main area is titled 'Teams' and contains a table with columns for 'Team Name', 'Goal', 'Raised', 'Size', 'Edit', and 'Page Status'. At the top of this section is a red-bordered button labeled 'Create a Team' with a red arrow pointing to it from the left. To its right is another red-bordered button labeled 'Click here'. At the bottom of the 'Teams' section are 'Back' and 'Save & Continue' buttons.

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.



The screenshot shows a modal window titled 'Create a Team'. It has fields for 'Team Name*' (with a required asterisk), a checkbox for 'Allow anyone to join this Team', and a 'Team Goal Amount*' field with a dollar sign and a '.00' placeholder. At the bottom is an orange 'Create' button. The background of the modal is white, while the rest of the page is grayed out. The 'Edit Campaign' interface is visible in the background.

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

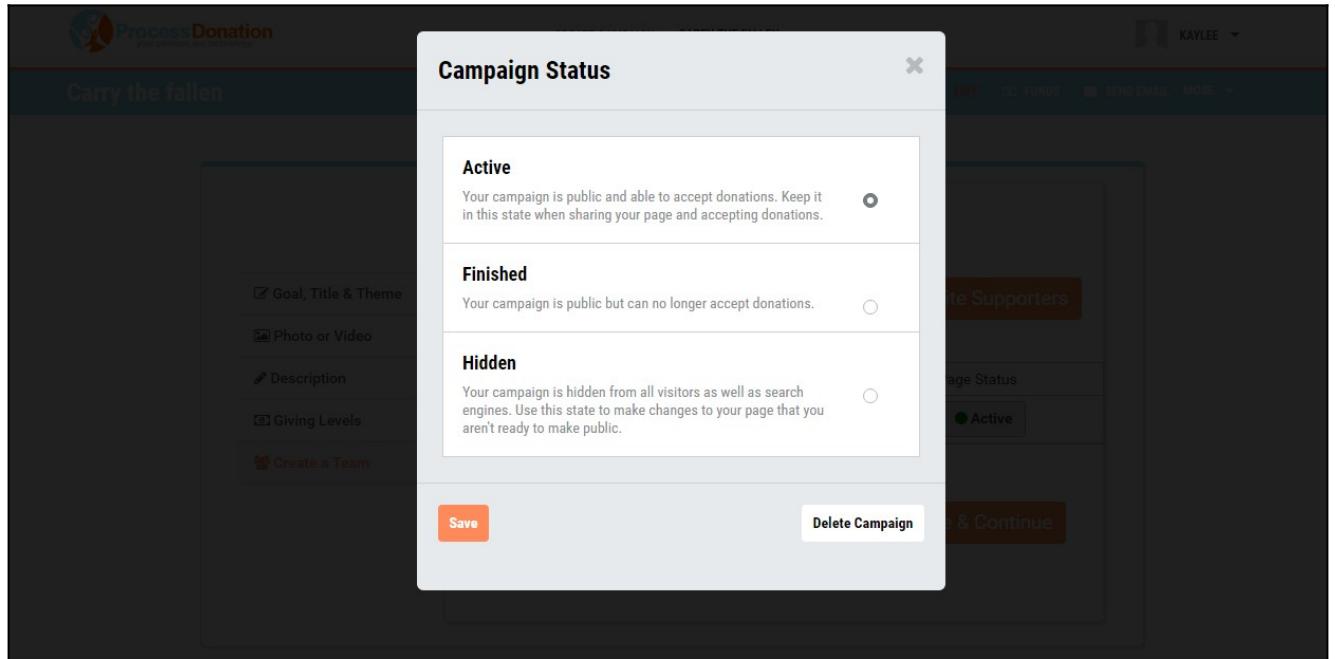
Team Goal Amount - Your Fundraiser can set any goal amount for the Team to make it competitive

The screenshot shows the 'Edit Campaign' interface. On the left, there's a sidebar with fields for 'Goal, Title & Theme', 'Photo or Video', 'Description', and 'Giving Levels'. Below these is a blue button labeled 'Create a Team'. The main area is titled 'Teams' and contains a table with one row. The table columns are 'Team Name', 'Goal', 'Raised', 'Size', 'Edit', and 'Page Status'. The row shows 'Team Yogis' with '\$500.00' in the Goal column, '\$100.00' in the Raised column, '1' in the Size column, an edit icon in the Edit column, and 'Active' in the Page Status column. To the right of the table is an orange button labeled 'Invite Supporters'. A red box and arrow point to the 'Click here' text above the 'Invite Supporters' button. At the bottom of the main area are 'Back' and 'Save & Continue' buttons.

Invite Supporters - Your Fundraiser can Invite Supporters

The screenshot shows a modal window titled 'Invite Supporters'. It contains three input fields: 'First Name*' with a placeholder, 'Last Name*' with a placeholder, and 'Supporter Email*' with a placeholder. Below these is an orange 'Invite' button. In the background, the 'Carry the fallen' campaign page is visible, showing the same 'Teams' table as the previous screenshot. The table has one row for 'Carry the fallen' with the same details as before. The 'Edit' and 'Page Status' columns are also visible.

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



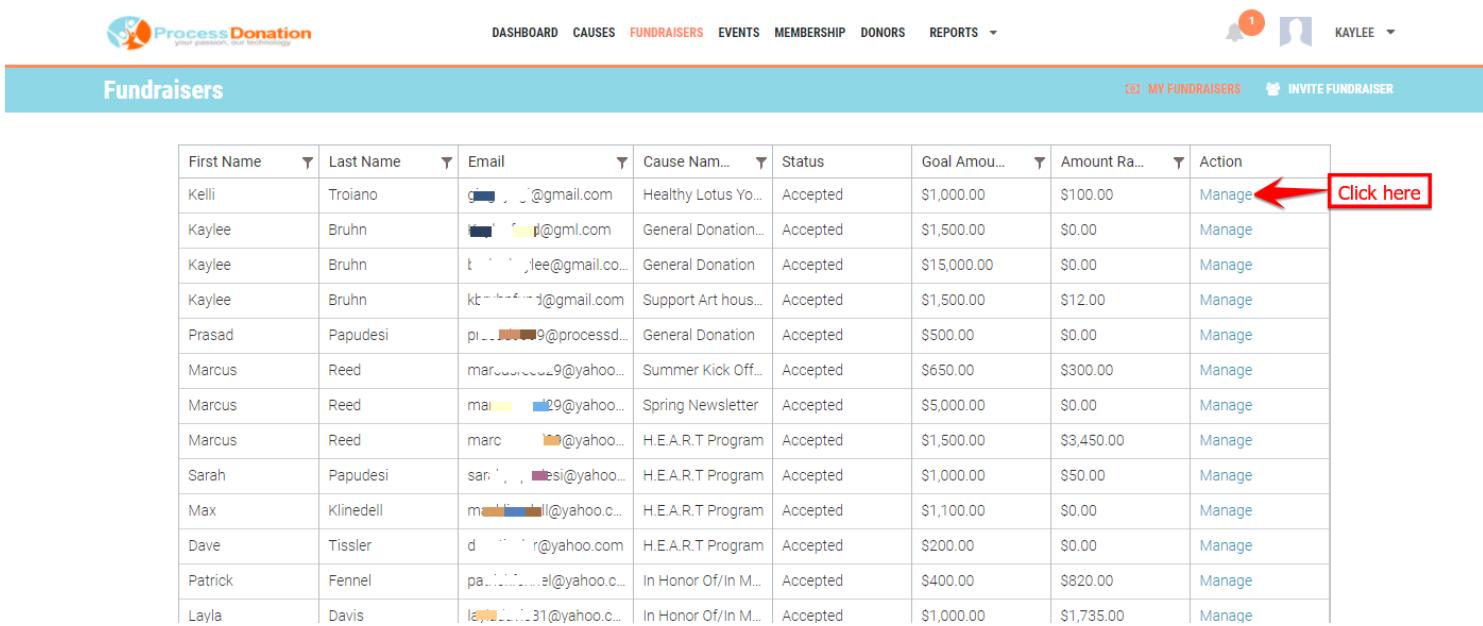
Save & Continue to proceed to creating fundraiser page

[**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' section of the Process Donation platform. At the top, there's a navigation bar with links for DASHBOARD, CAUSES, FUNDRAISERS (which is highlighted in red), EVENTS, MEMBERSHIP, DONORS, and REPORTS. To the right of the navigation is a user profile for 'KAYLEE' with a notification icon showing '1'. Below the navigation is a secondary header with 'MY FUNDRAISERS' and 'INVITE FUNDRAISER' buttons. The main content area is titled 'Fundraisers' and displays a table of fundraiser details. The columns include First Name, Last Name, Email, Cause Name, Status, Goal Amount, Amount Raised, and Action. The 'Action' column contains a 'Manage' link for each row. A red arrow points from the text 'Click here' to the 'Manage' link for the first row, which corresponds to Kaylee Bruhn.

First Name	Last Name	Email	Cause Name	Status	Goal Amou...	Amount Ra...	Action
Kelli	Troiano	[REDACTED]@gmail.com	Healthy Lotus Yo...	Accepted	\$1,000.00	\$100.00	Manage
Kaylee	Bruhn	[REDACTED]@gmail.com	General Donation...	Accepted	\$1,500.00	\$0.00	Manage
Kaylee	Bruhn	[REDACTED]@gmail.co...	General Donation	Accepted	\$15,000.00	\$0.00	Manage
Kaylee	Bruhn	[REDACTED]@gmail.com	Support Art hous...	Accepted	\$1,500.00	\$12.00	Manage
Prasad	Papudesi	[REDACTED]@processd...	General Donation	Accepted	\$500.00	\$0.00	Manage
Marcus	Reed	[REDACTED]@yahoo...	Summer Kick Off...	Accepted	\$650.00	\$300.00	Manage
Marcus	Reed	[REDACTED]@yahoo...	Spring Newsletter	Accepted	\$5,000.00	\$0.00	Manage
Marcus	Reed	[REDACTED]@yahoo...	H.E.A.R.T Program	Accepted	\$1,500.00	\$3,450.00	Manage
Sarah	Papudesi	[REDACTED]@yahoo...	H.E.A.R.T Program	Accepted	\$1,000.00	\$50.00	Manage
Max	Klinedell	[REDACTED]@yahoo.c...	H.E.A.R.T Program	Accepted	\$1,100.00	\$0.00	Manage
Dave	Tissler	[REDACTED]@yahoo.com	H.E.A.R.T Program	Accepted	\$200.00	\$0.00	Manage
Patrick	Fennel	[REDACTED]@yahoo.c...	In Honor Of/In M...	Accepted	\$400.00	\$820.00	Manage
Layla	Davis	[REDACTED]@yahoo.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:

The screenshot shows a campaign page for "Healthy Lotus Yoga Outreach". The page includes a logo for "the healthy lotus", the campaign name, contact information for Kelli Troiano, a progress bar showing "\$100 RAISED OF \$1,000", and buttons for "Add Offline Donation" and "Active".

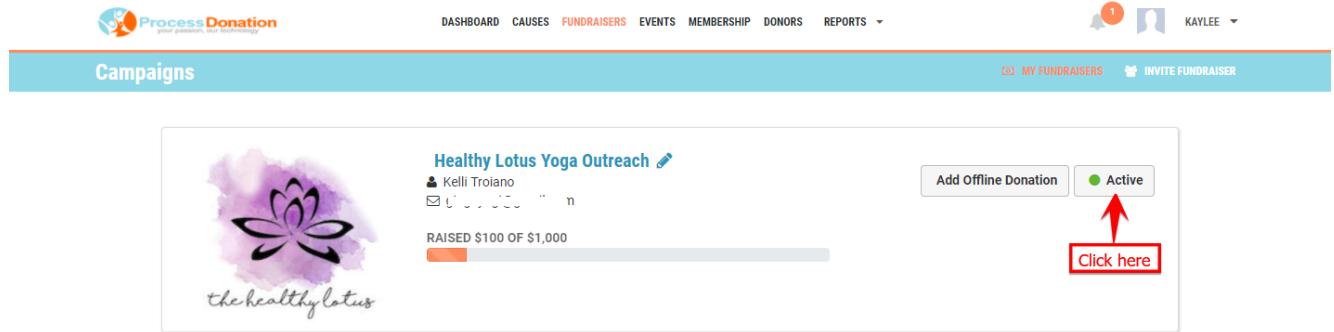
You can edit the page by clicking on the icon.

The screenshot shows the same campaign page as above, but with a red arrow pointing to the pencil icon next to the campaign name "Healthy Lotus Yoga Outreach". This indicates where the user should click to edit the campaign information.

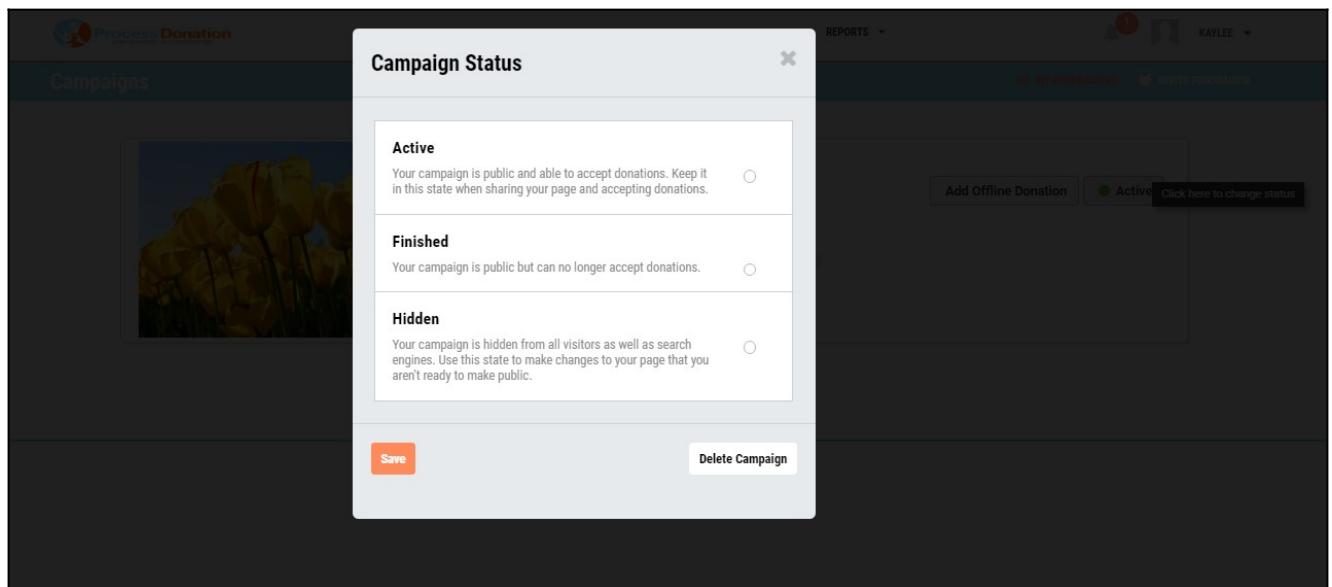
And you will be redirected to the page where you can edit the information, the flow will be similar to creating a new Fundraiser page.

The screenshot shows the "Edit Campaign" page. It features a sidebar with options like "Goal, Title & Theme", "Photo or Video", "Description", "Giving Levels", and "Create a Team". The main form area contains fields for "Team Goal Amount" (\$1500), "End Date" (1/31/2017), "Campaign Title" ("Support Art house Productions"), "Cause" ("Support Art house productions"), "Zip / Postal code" (92612), "City" (Irvine), and "State" (CA). Below the form is a "Pick Your Theme" section with a color palette and a "Save & Continue" button.

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



And take necessary action:



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

[**ADD OFFLINE DONATIONS**](#)

[**NEXT:**](#)

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 a software application window titled "Add Offline Donation". The window is centered over a background that appears to be a campaign dashboard for "Campaigns". The dashboard features a large image of yellow tulips. The modal window contains fields for entering donation details:

- Members***: A dropdown menu labeled "-- Select --".
- Amount***: An input field with a dollar sign (\$) prefix.
- Payment Type**: A dropdown menu set to "Cash".
- First Name***: An input field.
- Last Name***: An input field.
- Date**: A date input field with a calendar icon.
- Address**: An input field.
- Check/Ref#**: An input field.
- Postal / Zip**: An input field.
- Phone**: An input field.
- Email**: An input field with a link icon.
- City:** and **State:** dropdown menus.
- Comments**: A text area for notes.
- Make Donor Anonymous**: A checkbox.
- Save**: A button at the bottom right.

On the right side of the modal, there are buttons for "Offline Donation" and "Active". The background dashboard has tabs for DASHBOARD, CAUSES, CAMPAIGNS, EVENTS, MEMBERSHIPS, DONORS, and REPORTS. On the far right, there are user profile icons and links for "MY FUNDRAISERS" and "INVITE FUNDRAISER".

- 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.

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.

[Go back to Events](#)

Event Details

- [Tickets](#)
- [Buyer Information](#)

Event Title *

Event Description *

Starts On *

12:00 AM

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 'Create Event' form with the following fields:

- Event Details:** A tabbed section with 'Event Details' selected, containing fields for 'Event Title *' and 'Event Description *'.
- Tickets:** A tabbed section.
- Buyer Information:** A tabbed section.
- Starts On ***: Date and time input fields for the event start.
- Ends On ***: Date and time input fields for the event end.
- Repeat this event:** A checkbox.
- Event Occur:** A dropdown menu set to 'Daily'.
- From:** A date and time input field.
- To:** A date and time input field.
- Of the:** A dropdown menu set to 'Same day'.

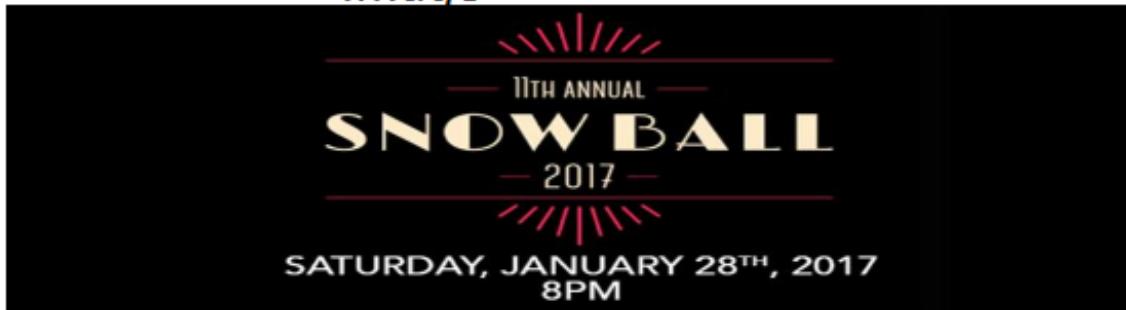
Here is an example of how an Event layout would look on the page. Of course, your website's unique branding will be represented.



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
 Saturday, January 28, 2017
 End: Saturday, January 28, 2017 12:00 AM

Venue Details
 Art House Productions, Inc.
 101 Morris Avenue
 Jersey City, NJ 07306
 Jersey City, NJ, 07306

Location Details
 Art House Productions, Inc.
 101 Morris Avenue
 Jersey City, NJ 07306
 201-915-9911
 info@arthouseproductions.org

Contact
 Art House Productions, Inc.
 101 Morris Avenue
 Jersey City, NJ 07306
 201-915-9911
 info@arthouseproductions.org

Contact Details

Location Map 

Event Description
 Art House Productions Snow Ball Gala Committee proudly presents the 11th Annual SNOW BALL on SATURDAY, JANUARY 28th, 2017 (Show Date: Saturday, February 4th). SNOW BALL is a "black tie creative" gala to benefit Art House Productions. The evening will feature live music, light fare, open bar, silent auction and a festive, arts-friendly 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!

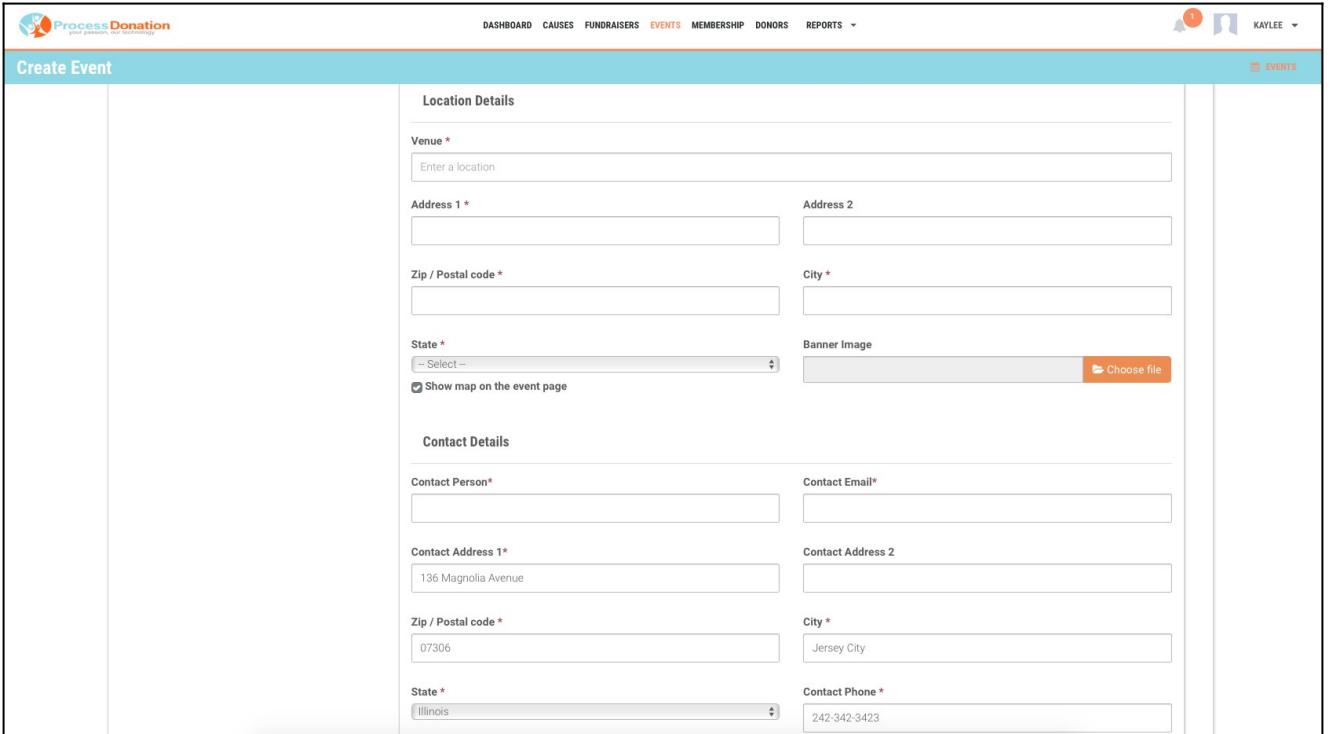
TICKET NAME	PRICE	QUANTITY	TOTAL PRICE
VIP Ticket	\$150.00	<input type="text" value="0"/>	\$0.00
Tickets			
SPECIAL PRESALE TICKET	\$80.00	<input type="text" value="0"/>	\$0.00

Promo Code:

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 shows the 'Create Event' form on the Process Donation website. The 'Location Details' section contains fields for Venue, Address 1, Address 2, Zip / Postal code, City, State, and Banner Image. The 'Contact Details' section contains fields for Contact Person, Contact Email, Contact Address 1, Contact Address 2, Zip / Postal code, City, State, and Contact Phone.

Location Details	
Venue *	<input type="text"/>
Address 1 *	<input type="text"/>
Zip / Postal code *	<input type="text"/>
City *	<input type="text"/>
State *	<input type="text"/>
Banner Image	<input type="file"/> Choose file
<input checked="" type="checkbox"/> Show map on the event page	
Contact Details	
Contact Person*	<input type="text"/>
Contact Email*	<input type="text"/>
Contact Address 1*	<input type="text"/>
Contact Address 2	<input type="text"/>
Zip / Postal code *	<input type="text"/>
City *	<input type="text"/>
State *	<input type="text"/>
Contact Phone *	<input type="text"/>

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, NJ, 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.

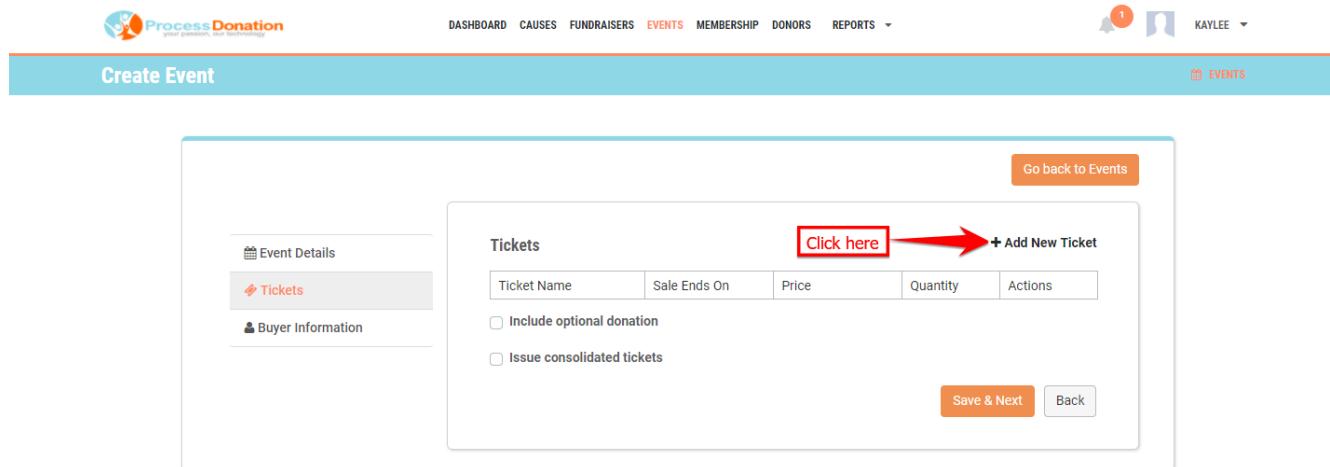
31. Save & Next - Click this button to save the information added and proceed to next phase of creating an Event i.e., creating Tickets for the Event.

32. Cancel - Click to cancel

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

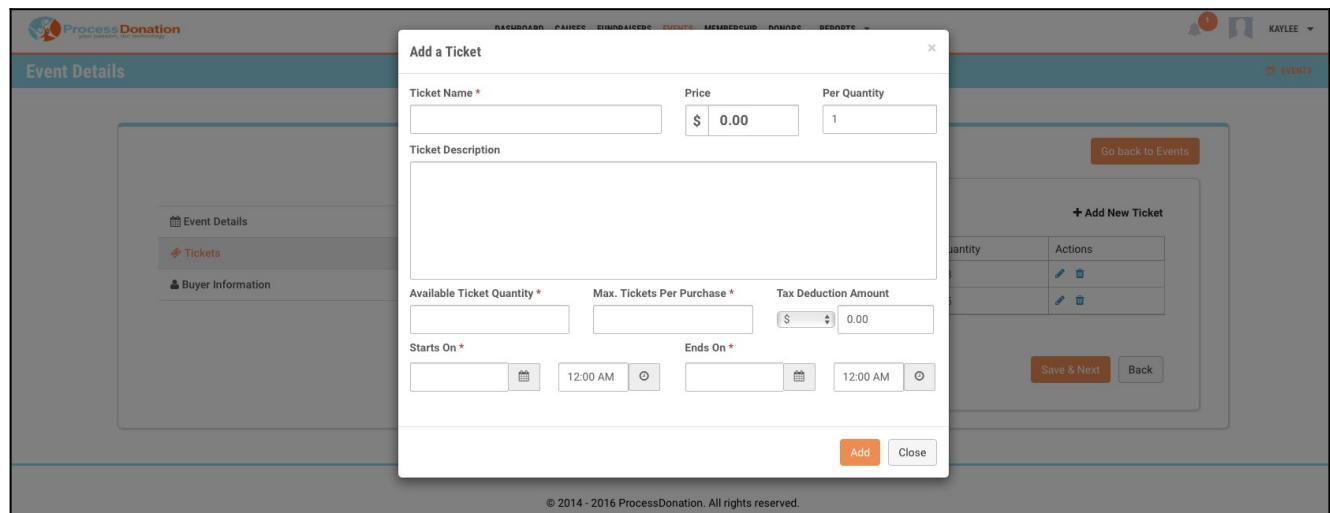
ADD / EDIT TICKETS

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



The screenshot shows the 'Create Event' screen. On the left, there's a sidebar with 'Event Details', 'Tickets' (which is highlighted in orange), and 'Buyer Information'. The main area is titled 'Tickets' and contains a table with columns for 'Ticket Name', 'Sale Ends On', 'Price', 'Quantity', and 'Actions'. Below the table are two checkboxes: 'Include optional donation' and 'Issue consolidated tickets'. At the bottom right of the main area are 'Save & Next' and 'Back' buttons. A red arrow points from the text above to the '+ Add New Ticket' button in the top right corner of the main area.

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



The screenshot shows a 'Add a Ticket' modal window. It has fields for 'Ticket Name *' (with a placeholder 'Ticket Name'), 'Price' (\$ 0.00), 'Per Quantity' (1), 'Ticket Description' (empty), 'Available Ticket Quantity *' (empty), 'Max. Tickets Per Purchase *' (empty), 'Tax Deduction Amount' (\$ 0.00), 'Starts On *' (empty), and 'Ends On *' (empty). At the bottom are 'Add' and 'Close' buttons. The background shows the 'Create Event' screen with the 'Tickets' tab selected.

- Ticket Name** - Enter Ticket name so you can distinguish between different Tickets.
- Price** - Enter the Ticket price.
- Per Quantity** - Enter the number of Tickets you want to issue for the price.
Generally, use a quantity of 1.
- Ticket Description** - Enter the description for the Ticket.
- Available Ticket Quantity** - Enter the total number of Tickets you want to sell for this Ticket type for this Event.
- 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	0	\$0.00
Corporate	\$200.00	0	\$0.00
Family	\$50.00	0	\$0.00
Single	\$0.00	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.

The screenshot shows the Process Donation software interface. At the top, there's a navigation bar with links for DASHBOARD, CAUSES, FUNDRAISERS, EVENTS (which is the active tab), MEMBERSHIP, DONORS, and REPORTS. On the right side, there are user profile icons for 'KAYLEE' and a dropdown menu labeled 'EVENTS'. The main content area has a teal header bar labeled 'Event Details'. Below it, there are two sections: 'Event Details' and 'Buyer Information'. Under 'Event Details', there are fields for 'Event Details' and 'Tickets'. Under 'Buyer Information', there is a button labeled 'Buyer Information'. In the center, there's a large white box containing three radio buttons: 'Basic' (selected), 'Buyer', and 'Buyer & Attendees'. Below the radio buttons, a message reads: 'You are gathering First Name, Last Name and Email of the Buyer.' At the bottom right of this box are 'Done' and 'Back' buttons. At the very bottom of the page, a small copyright notice says: '© 2014 - 2016 ProcessDonation. All rights reserved.'

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		
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

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.

Additional Information for Buyer

Custom Questions	+ Add your custom question(s)
Include Required	
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"/>  

Done **Back**

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--

*** Select your start date?**

mm/dd/yyyy

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
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 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"/>			

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
Please enter first name

Business Information

Organization Work Phone

Additional questions

What is name of your University?

SUBMIT **CANCEL**

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?](#)

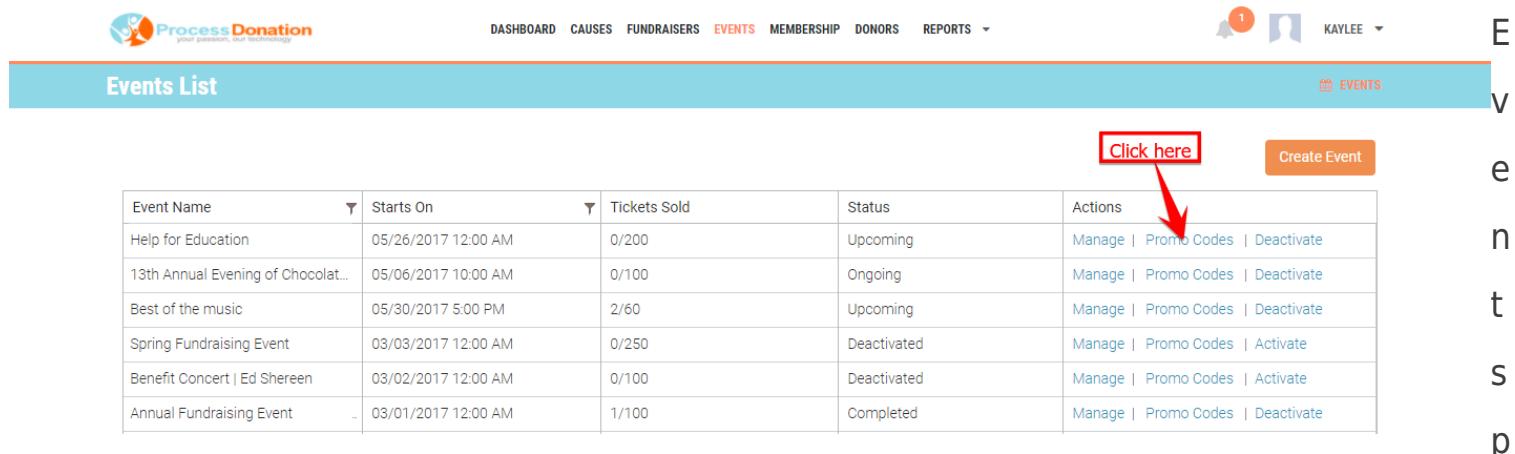
LINK THE EVENT PAGE TO YOUR WEBSITE

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.

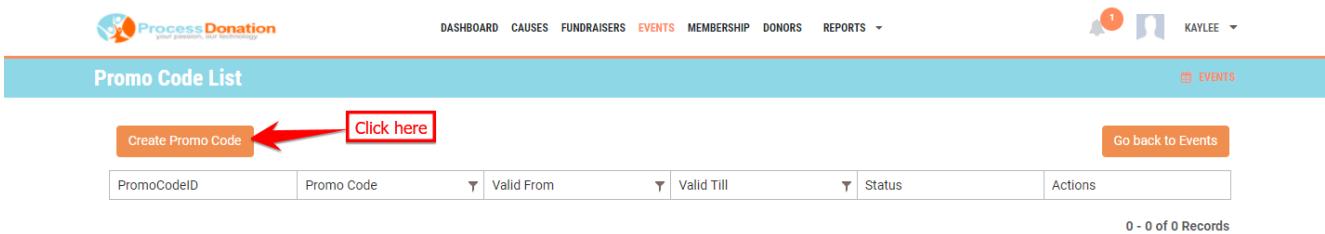
To create Promo Codes for the Event that way the users can avail certain benefits while purchasing Event Tickets, click on **Promo Codes** link corresponding to the Event from the



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.

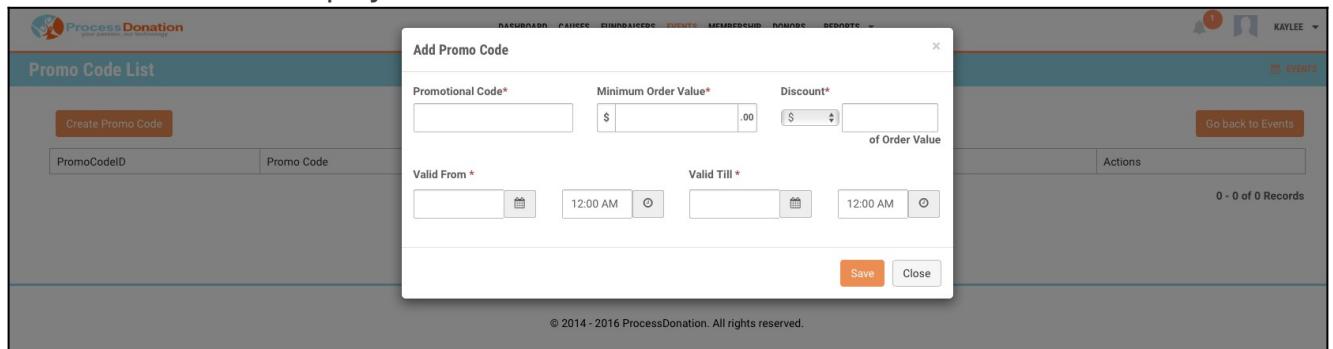
On the next page i.e., **Promo Code List** page click on **Create Promo Code** button



PromoCodeID	Promo Code	Valid From	Valid Till	Status	Actions
0 - 0 of 0 Records					

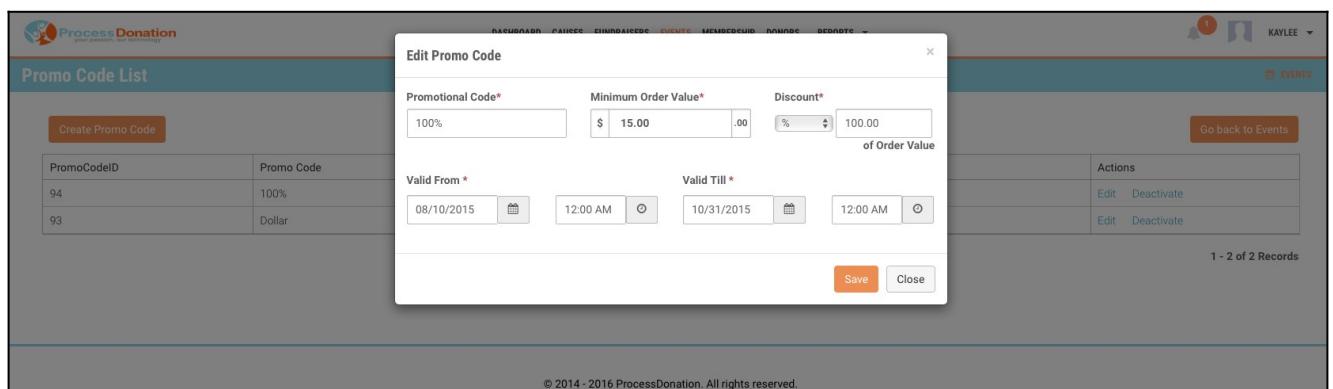
- **Promotional Code** - Enter name/code you want to assign to a Promotional Code

- **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

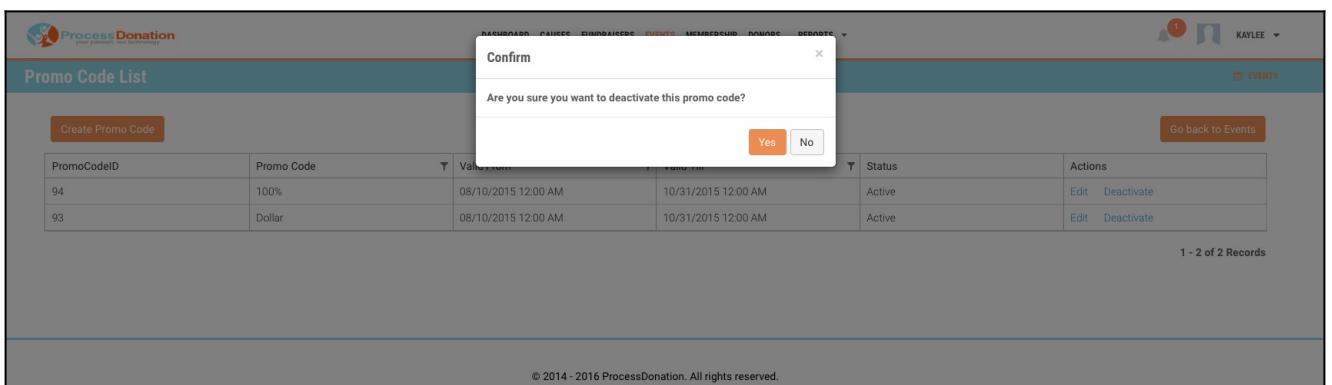


Upon clicking on **Save** button the Promo Code will be saved.

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

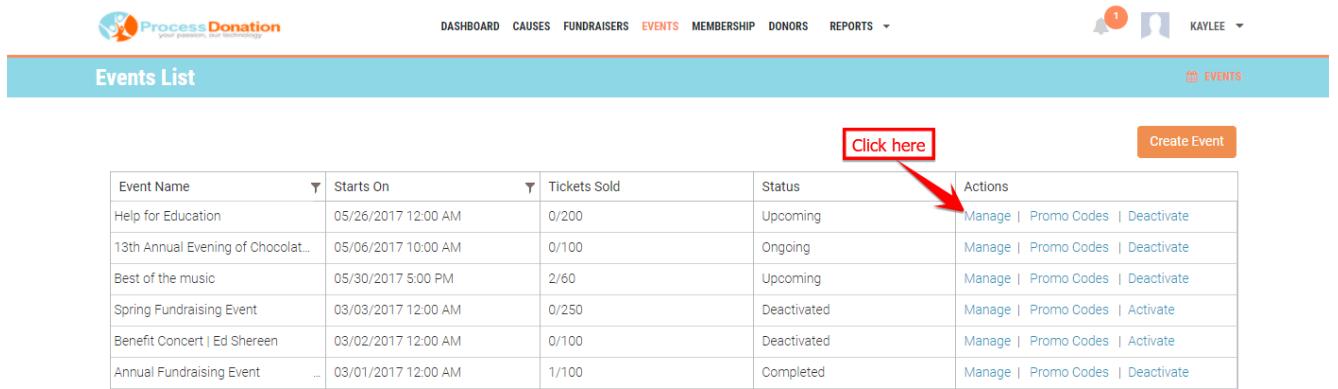


You may choose to deactivate an existing Promo Code by simply clicking on Deactivate link corresponding to the Promo Code ID and confirm your action.



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.



The screenshot shows the 'Events List' section of the Process Donation platform. At the top, there's a navigation bar with links for DASHBOARD, CAUSES, FUNDRAISERS, EVENTS (which is highlighted in orange), MEMBERSHIP, DONORS, and REPORTS. On the far right, there's a user profile for 'KAYLEE' with a notification icon showing '1'. Below the navigation is a teal header bar with 'Events List' on the left and a 'Create Event' button on the right. The main area contains a table with the following data:

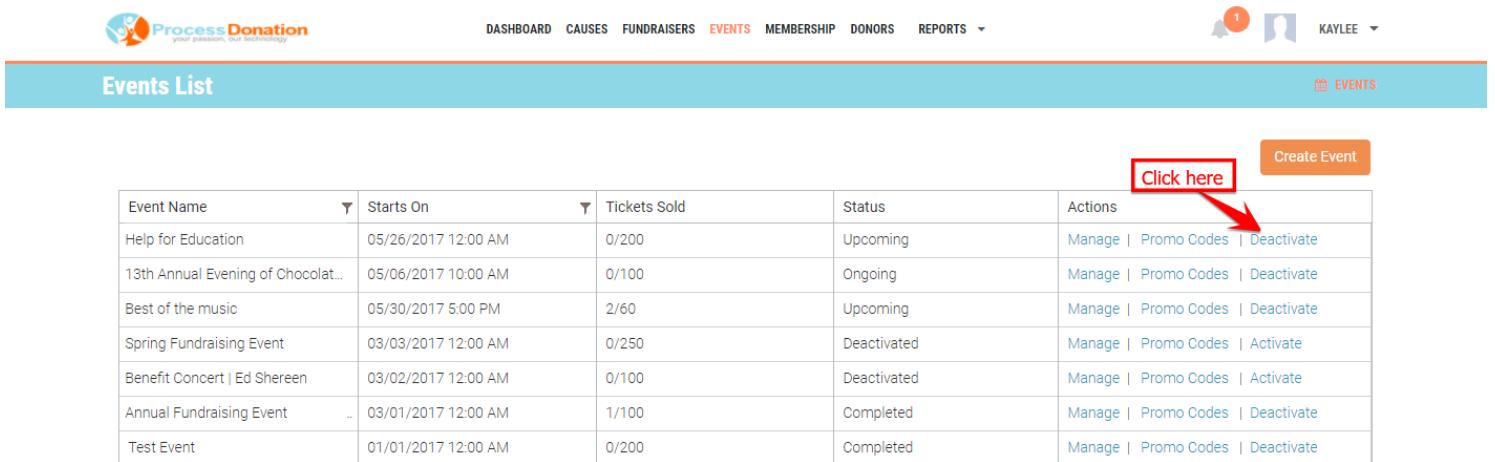
Event Name	Starts On	Tickets Sold	Status	Actions
Help for Education	05/26/2017 12:00 AM	0/200	Upcoming	Manage Promo Codes Deactivate
13th Annual Evening of Chocolate	05/06/2017 10:00 AM	0/100	Ongoing	Manage Promo Codes Deactivate
Best of the music	05/30/2017 5:00 PM	2/60	Upcoming	Manage Promo Codes Deactivate
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

Click here

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.

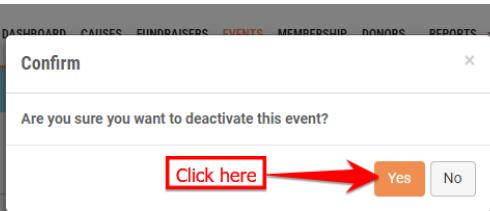
If you wish you deactivate an existing Event, simply click on **Deactivate** link corresponding to the Event.



The screenshot shows the 'Events List' page of the Process Donation software. At the top right, there is a 'Create Event' button. Below it, a table lists several events with columns for 'Event Name', 'Starts On', 'Tickets Sold', 'Status', and 'Actions'. In the 'Actions' column for each event, there is a link labeled 'Deactivate'. A red box highlights this link for the first event, and a red arrow points from it to the 'Click here' label above the table.

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 Chocolate...	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.



The screenshot shows the 'Events List' page again, but with a 'Confirm' dialog box overlaid. The dialog box has a title 'Confirm' and the question 'Are you sure you want to deactivate this event?'. It contains two buttons: 'Click here' (highlighted with a red box and arrow) and 'Yes'. A red arrow also points from the 'Click here' label on the main page to this 'Click here' button in the dialog.

Are you sure you want to deactivate this event?

[Click here](#) [Yes](#) [No](#)

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 Chocolate...	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

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 the homepage of the Art House website. At the top, there is a red header with the text "ART HOUSE" in white, bold letters. Below the header, in smaller red text, is "VISUAL + PERFORMING ARTS | JERSEY CITY | EST. 2001". The main navigation menu below the header includes links for "ABOUT", "SHOWS & TICKETS", "EXHIBITS", "CALENDAR", "EDUCATION", "SHOP", "PRESS", and "CONTACT". To the right of the menu, there is a red button labeled "DONATE TODAY!". Below the menu, the word "MEMBERSHIP" is written in red capital letters. Further down the page, there is a section titled "Become a Member!" with three numbered steps: "1 Member Info", "2 Payment Info", and "3 Confirmation". To the left of this section, there is a "Contact Information" block containing the address: "Art House Productions, Inc. 136 Magnolia Avenue, Jersey City, NJ 07306 201-915-9911". To the right of the "Become a Member!" section, there is a "Membership Form" block. It includes a label "Membership Levels" with a note "*Required field" and a dropdown menu with the placeholder "Please Select".

[**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**](#)

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

[**PREVIOUS:**](#)

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' setup page. At the top, there's a navigation bar with links for DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP (which is highlighted in orange), DONORS, and REPORTS. On the far right, there's a user profile for 'KAYLEE' with a notification icon. The main content area has a teal header 'Membership Details'. On the left, there's a sidebar with three options: 'Membership Details' (selected and highlighted in red), 'Membership Levels', and 'Member Information'. The main form area contains fields for 'Title *' (with 'Become a Member!' entered), 'Description *' (with a note about attending meetings and participating in projects), 'Reminder Days' (with a checkbox for 'Daily Reminder'), 'Contact Details' (including fields for 'Contact Person*', 'Contact Email*', 'Contact Address 1*', 'Contact Address 2', 'Zip / Postal code*', 'City*', 'State*', and 'Contact Phone*'), and a checkbox for 'Provide Member the Option to Cover the Processing Fee'. At the bottom right are 'Save & Next' and 'Cancel' buttons.

- Title** - Give a title to the Membership Form
- Description** - You may enter a brief description about the Membership
- 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.

The screenshot shows the 'Create Membership' interface. On the left, there's a sidebar with 'Membership Details' (highlighted in red), 'Membership Levels' (highlighted in red), and 'Member Information'. The main area has fields for 'Title *' and 'Description *'. At the top right, there's a red arrow pointing to a button labeled 'Click here' which is enclosed in a red box. Next to it is another button labeled 'Go back to Membership Form List'.

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)

The screenshot shows the 'Add Membership Level' dialog box. It includes fields for 'Membership Level *', 'Allow Price Range' (unchecked), 'Price *' (with a '\$' sign and a dropdown menu), 'Tax Deduction Amount' (with a '\$' sign and a dropdown menu showing '0.00'), 'Validity *' (with radio buttons for 'Lifetime' and 'Time Specific' and a 'Month(s)' input field), and a 'Description *' text area. At the bottom are 'Add' and 'Close' buttons. The background shows the 'Membership Details' page with a sidebar.

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.

The screenshot shows the 'Membership Details' page. On the left, there's a sidebar with 'Membership Details', 'Membership Levels', and 'Member Information'. The main area has two tabs: 'Personal Information' and 'Business Information'. Both tabs have columns for 'Include' and 'Required' with checkboxes. Fields include First Name, Middle Name, Last Name, Email, Alternative Email, Mobile, Home Phone, Gender, Date of Birth, Address 1, Address 2, City, State, Zip/Postal Code, Spouse Name, and Number of Children. At the bottom, there's a section for 'Additional Information for Member', 'Custom Questions', and a button to 'Add your custom question(s)'. There are also 'Include' and 'Required' checkboxes for these questions. At the very bottom are 'Done' and 'Back' buttons.

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.

State
Zip/Postal Code
Spouse Name
Number of Children

Additional Information for Buyer

Custom Questions [+ Add your custom question\(s\)](#)

Include Required

Done Back

Custom Question

Title of your question *

Field type for this question * Text Box (Free text)

Save Cancel

Membership Details

Custom Question

Title of your question *

Field type for this question * Text Box (Free text)

Save Cancel

Additional Information for Member

Custom Questions [+ Add your custom question\(s\)](#)

Include Required

Done Back

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

[**NEXT: LINK MEMBERSHIP FORM TO YOUR WEBSITE**](#)

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

[**PREVIOUS:**](#)

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
FORM TO YOUR WEBSITE**](#)

[**PREVIOUS LINK MEMBERSHIP**](#)

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. The top navigation bar includes links for DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP (which is highlighted in blue), DONORS, and REPORTS. On the right, there are user icons for KAYLEE and a notification bell with one new message. The main content area has a teal header bar with the text 'Membership Form List'. Below it is a table with columns for 'Membership Form Title', 'Status', and 'Actions'. The 'Actions' column contains three links: 'Manage | Promo Codes | Activate'. A red box surrounds the 'Click here' button in the first row's 'Actions' column, and a red arrow points from this box to the 'Manage' link in the table row for the 'World Affairs Council 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

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

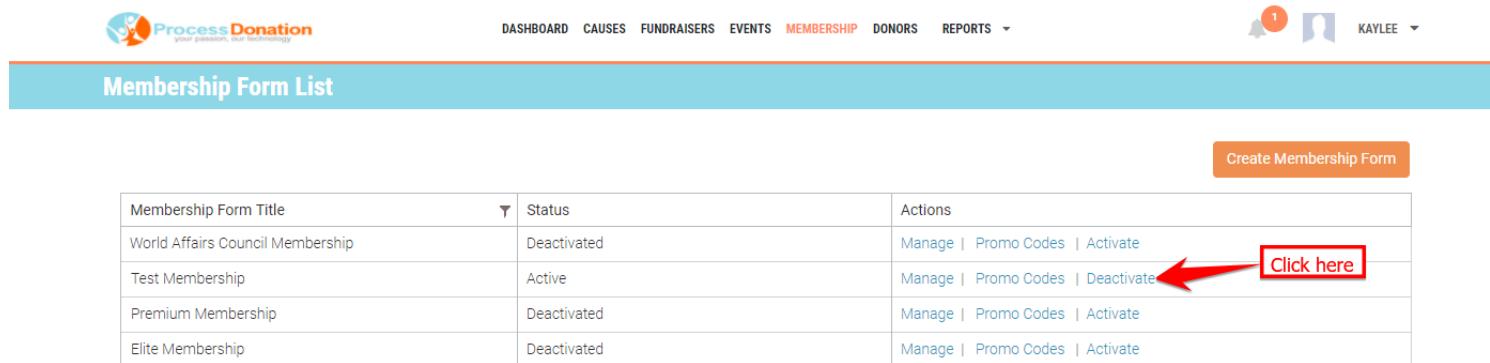
[**NEXT: DEACTIVATE A MEMBERSHIP FORM**](#)

[**PREVIOUS: LINK**](#)

[**MEMBERSHIP FORM TO YOUR WEBSITE**](#)

DEACTIVATE A MEMBERSHIP FORM

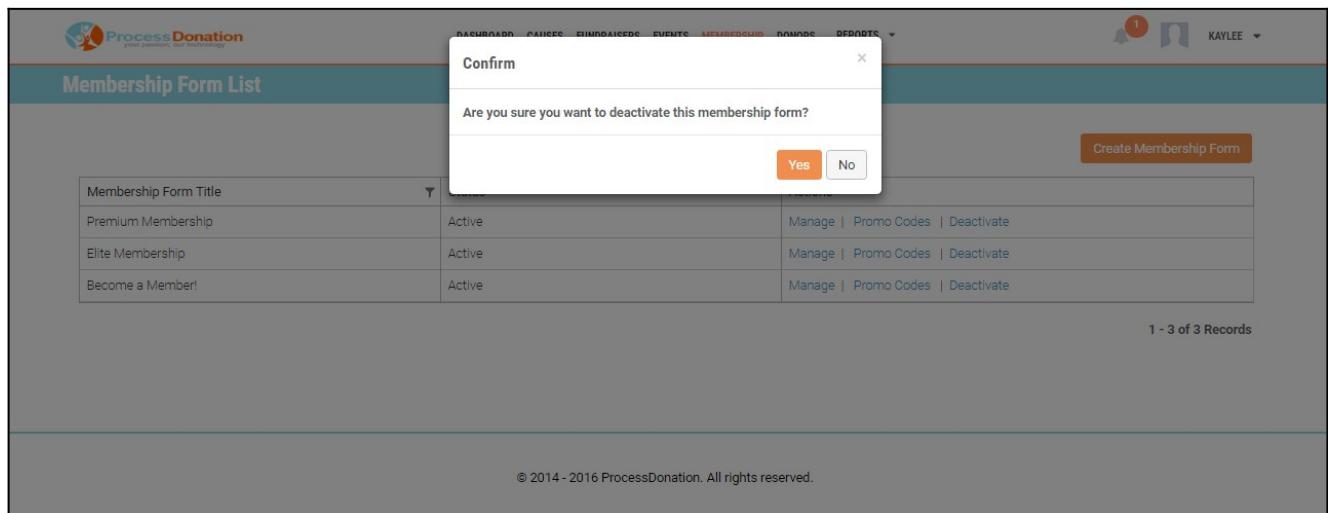
To deactivate an existing Membership, simply click on the **Deactivate** link corresponding to the Membership and confirm the action by clicking on Yes. There is no option to delete a Membership because if a Membership was deleted it would ruin the Reporting, so instead you will need to Deactivate the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



The screenshot shows the 'Membership Form List' page. At the top right, there is a 'Create Membership Form' button. Below it is a table with columns for 'Membership Form Title', 'Status', and 'Actions'. The 'Actions' column contains links for 'Manage', 'Promo Codes', and 'Activate/Deactivate'. A red box highlights the 'Deactivate' link for the 'Test Membership' row, and a red arrow points to it from the left.

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

Confirm your action by clicking on Yes:



The screenshot shows a 'Confirm' dialog box in the center of the screen, asking 'Are you sure you want to deactivate this membership form?'. Below the dialog is the 'Membership Form List' table. The table has three rows, each with a 'Status' column showing 'Active'. The 'Actions' column for each row contains links for 'Manage', 'Promo Codes', and 'Deactivate'. The 'Deactivate' link for the first row is highlighted with a red box and a red arrow pointing to it from the left.

Membership Form Title	Status	Actions
Premium Membership	Active	Manage Promo Codes Deactivate
Elite Membership	Active	Manage Promo Codes Deactivate
Become a Member!	Active	Manage Promo Codes Deactivate

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**](#)

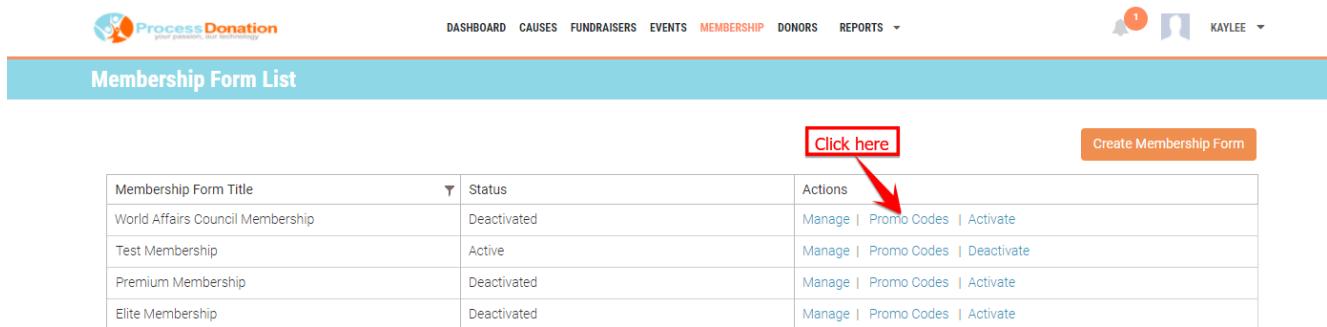
[**MANAGE A MEMBERSHIP FORM**](#)

[**PREVIOUS:**](#)

CREATE / MANAGE PROMO CODES FOR MEMBERSHIPS

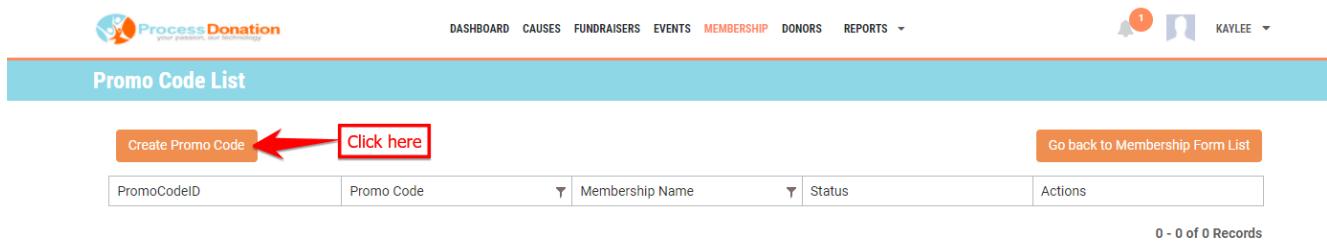
Promo Codes (Aka Discount Codes) can help you attract Members in large numbers in order to make your Membership program successful. Promo Codes (such as discount for prior donors), incentives for participants on sign up, track which social media channel is the most productive in bringing people to become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

- **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

Promo Code List

Add Promo Code

Promotional Code*	Membership Name*	Discount*
<input type="text"/>	Select	\$ <input type="text"/>
of Order Value		
Valid From *	12:00 AM	Valid Till *
<input type="text"/> <input type="button" value=""/>	12:00 AM <input type="button" value=""/>	<input type="text"/> <input type="button" value=""/>
<input type="button" value="Save"/> <input type="button" value="Close"/>		

© 2014 - 2016 ProcessDonation. All rights reserved.

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

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

Promo Code List

PromoCodeID	Promo Code	Membership Name	Status	Actions
27	TAP 2017	TEST	Active	Edit Deactivate

Click here

1 - 1 of 1 Records

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.

Promo Code List

Confirm

Are you sure you want to deactivate this promo code?

PromoCodeID	Promo Code	Membership Name	Status	Actions
21	PMCODE	gold	Active	Edit Deactivate

1 - 1 of 1 Records

[**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		johndoe@processdonation.org	\$100.00	09/14/2016
Prasad	Papudesi		prasad@processdonation.org	\$150.00	09/12/2016
Elliott	James		e.james@connexinfo.com	\$50.00	09/08/2016
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.

The screenshot shows the 'Donors List' page of the Process Donation application. At the top right, there is a user profile for 'KAYLEE'. Below the header, there is a red box labeled 'Click here' with a red arrow pointing to a dropdown menu. The dropdown menu contains three options: 'Excel', 'CSV', and 'PDF', with 'PDF' being the selected option. The main content area displays a table with columns: First Name, Last Name, Organization Name, Email, and Amount Transacted. The table contains five rows of data.

First Name	Last Name	Organization Name	Email	Amount Transacted
Dwight	Dwight		r@processdonation.com	\$50.00
James	Smith		j@processdonation.com	\$175.00
Lindy	Gardner		l@processdonation.com	\$100.00
John	Doe		j@processdonation.com	\$150.00
Prasad	Papudesi		p@processdonation.com	\$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:

The screenshot shows the 'Process Donation' software interface. On the left, there's a 'Donors List' grid with columns for First Name and Last Name. A 'Donor' button is visible above the grid. On the right, a modal window titled 'Add Donor' is open, containing fields for 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, and About Donor. There are also 'Add Donor' and 'Close' buttons at the bottom right of the modal.

First Name	Last Name
Kenly	David
Dwight	Dwight
James	Smith
Lindy	Gardner
John	Doe
Prasad	Papudesi
Elliott	James
Martha	Stanton
Daniel	Figone
Marcus	Reed
Andrew	Clerk
First Name	Last Name
Kenly	David
Dwight	Dwight
James	Smith
Lindy	Gardner
John	Doe
Prasad	Papudesi
Elliott	James
Martha	Stanton
Daniel	Figone
Marcus	Reed
Andrew	Clerk
Sarah	Papudesi
Lyla	Davis

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.

First Name	Last Name	Organization Name	Email	Amount Transacted	Donor Since
Nancy	Taylor	Connex info systems	[REDACTED]	\$15.93	02/23/2017
PD	Sales	Process Donation	[REDACTED]	\$175.00	12/11/2015
Kash	Weinberger	Wells Fargo Bank	[REDACTED]	\$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

Kash Weinberger



Email: kash@rocketmail.com
Phone: 619-436-7553
Address: 327 San Fernando Street, San Diego, CA
Birthday: 03/03/1981

Total Donations	Donation Amount	Donor Since
48	\$5,831.00	08/17/2015

Donations

- ② Donated \$200.00 for General Donation on 09/17/2016
- ② Donated \$200.00 for General Donation on 08/17/2016
- ② Donated \$250.00 for General Donation on 07/17/2016
- ② Donated \$80.00 for General Donation on 06/17/2016
- ② Donated \$50.00 for H.E.A.R.T Program on 06/08/2016 (Offline Don...)

[View All](#)

Notes

- ② 12/14/2015 8:00 AM
Donor pledged \$50 a month

[View All](#)

Reminders

Wednesday, January 20, 2016

- ② 10:00 AM
[Send email](#)
Encourage donor to renew recurring donation

[View All](#)

Recurring Donations

② H.E.A.R.T Program	\$150.00	Yearly
② General Donation	\$200.00	Monthly
② General Donation	\$50.00	Monthly
② General Donation	\$200.00	Monthly

Link Donor

 Kaylee Bruhn (Wife)

[View All](#)

Activities

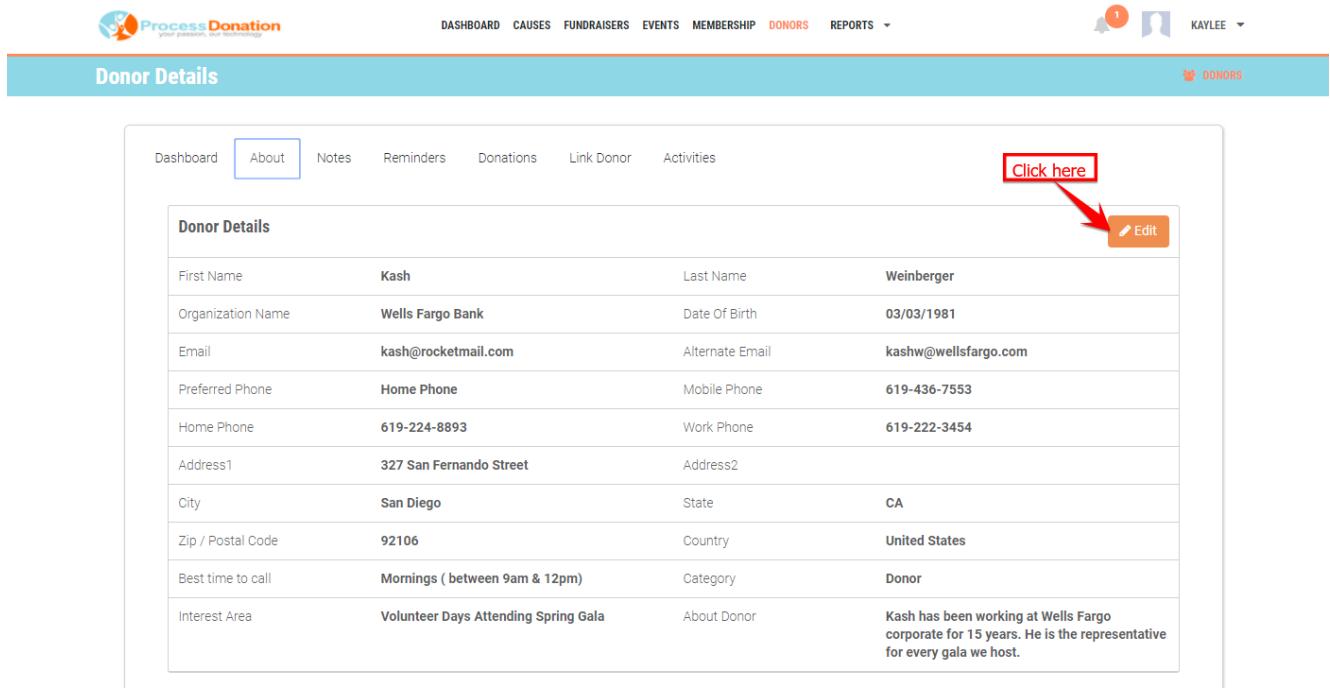
- ② Transacted \$8.00 for Annual Fundraising Event on 05/02/2016
- ② Transacted \$198.00 for Spring Fundraising Event on 04/18/2016
- ② Transacted \$100.00 for Spring Fundraising Event on 04/18/2016
- ② Transacted \$8.00 for Annual Fundraising Event on 04/15/2016
- ② Transacted \$100.00 for Spring Fundraising Event on 04/01/2016

[View All](#)

© 2014 - 2016 ProcessDonation. All rights reserved.

About

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



The screenshot shows the 'Donor Details' page of the Process Donation software. At the top, there is a navigation bar with links for DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. On the far right, there are icons for notifications (with a count of 1), user profile (KAYLEE), and a dropdown menu. Below the navigation bar, the title 'Donor Details' is displayed. Underneath the title is a horizontal menu with links: Dashboard, About (which is selected and highlighted in blue), Notes, Reminders, Donations, Link Donor, and Activities. To the right of this menu, there is a red box with the text 'Click here' and an orange 'Edit' button with a pencil icon. The main content area is a table titled 'Donor Details' with the following data:

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

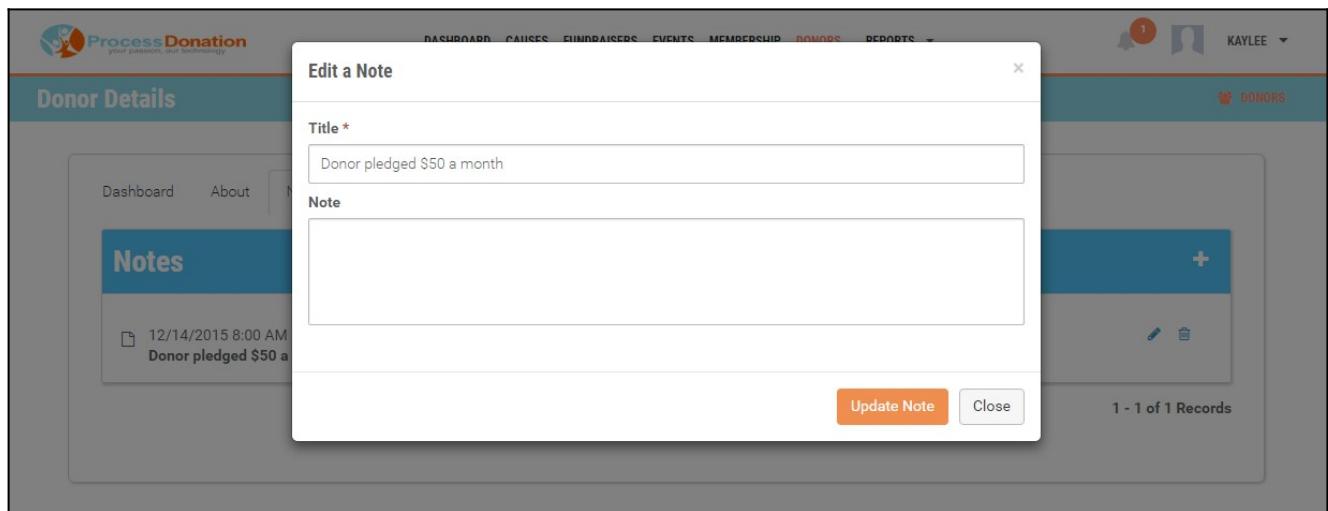
Here is where you would put in some notes about the Donor, maybe to document a conversation. Provide a title to the note to be able to understand the content of the note at a glance.

The screenshot shows the 'Donor Details' page of the Process Donation software. The top navigation bar includes links for DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS (which is highlighted in orange), and REPORTS. On the right side, there's a user profile for 'KAYLEE' with a notification badge showing '1'. Below the navigation, a blue header bar says 'Donor Details'. Underneath, a sub-menu has 'Notes' selected. A list area titled 'Notes' contains one item: '12/14/2015 8:00 AM Donor pledged \$50 a month'. To the right of this item are edit and delete icons. At the bottom right of the list area, it says '1 - 1 of 1 Records'. The footer of the page reads '© 2014 - 2016 ProcessDonation. All rights reserved.'

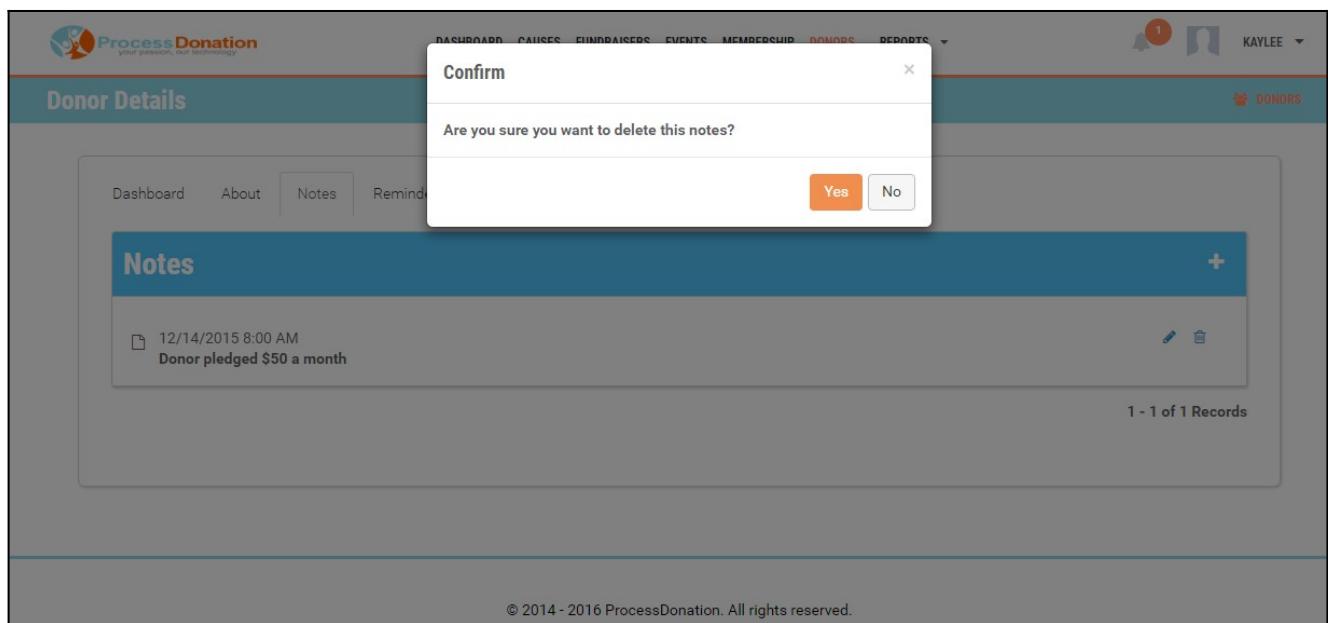
To add a new Note simply click on the plus symbol corresponding to the Notes in the window.

This screenshot is similar to the previous one, showing the 'Donor Details' page. The 'Notes' tab is selected. A note is listed: '12/14/2015 8:00 AM Donor pledged \$50 a month'. A red box highlights the '+' icon at the top right of the notes section, with a red arrow pointing to it. The footer reads '© 2014 - 2016 ProcessDonation. All rights reserved.'

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

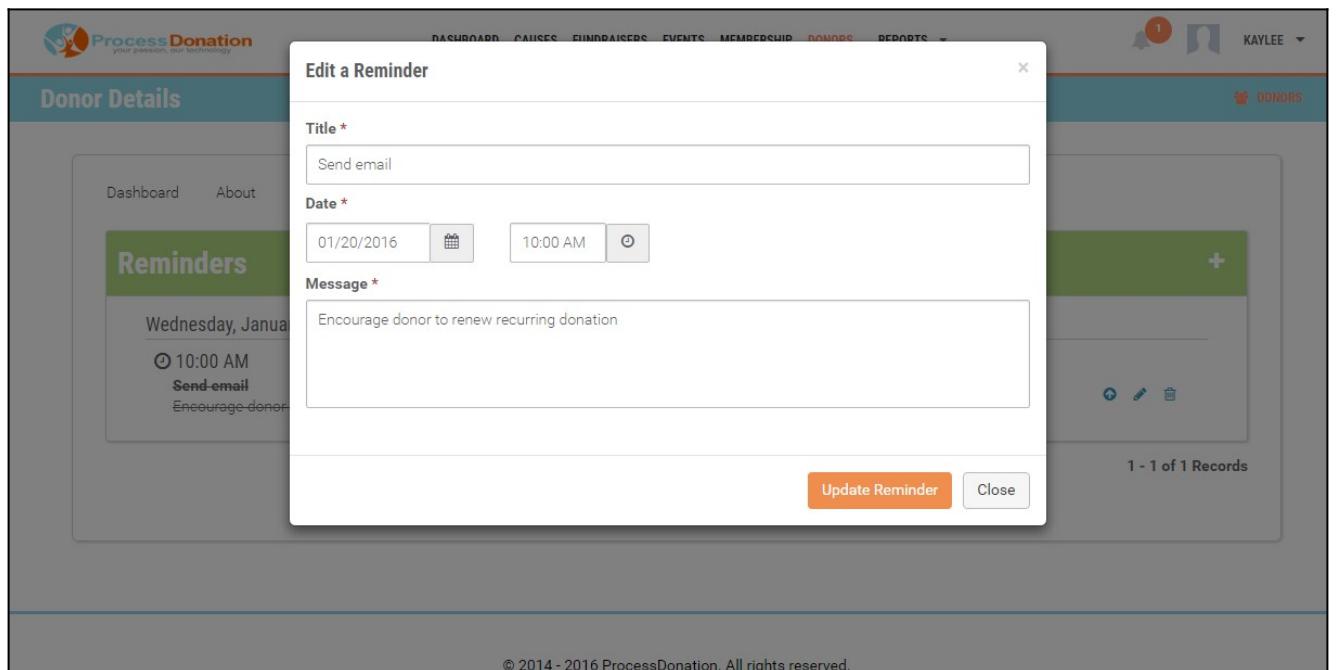
You can set important Reminders for you related to specific Donors; when the Reminder is due you will be notified by the bell icon in the upper right hand corner of the screen (see below, in the picture there is "1" notification).

The screenshot shows the 'Donor Details' page for a donor named 'KAYLEE'. The top navigation bar includes links for DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. A notification bell icon shows one new message. The 'DONORS' section is highlighted. The main content area is titled 'Reminders' and displays a single record: 'Wednesday, January 20, 2016' at '10:00 AM' with the action 'Send-email' and the note 'Encourage donor to renew recurring donation'. There are edit and delete icons next to the reminder. At the bottom right of the content area, it says '1 - 1 of 1 Records'.

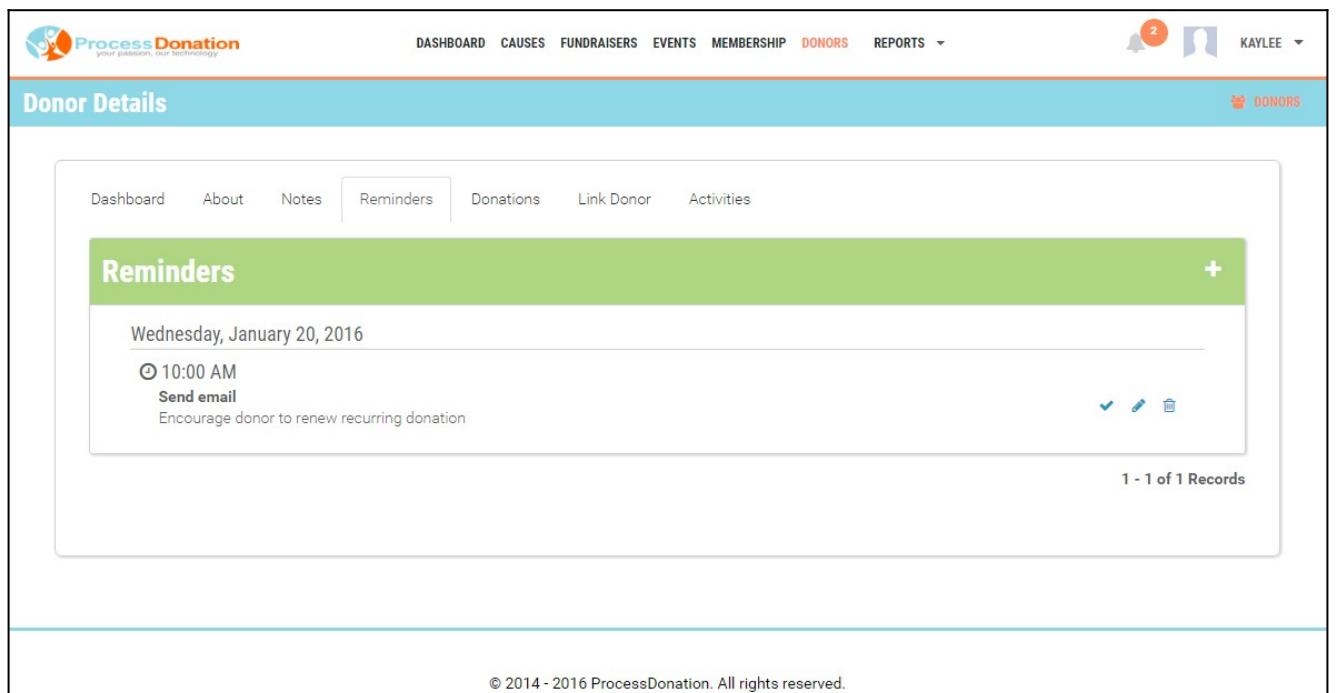
To add a new Reminders simply click on the plus symbol corresponding to the Reminders in the window.

The screenshot shows the 'Donor Details' page for a donor named 'KAYLEE'. The top navigation bar and 'DONORS' section are identical to the previous screenshot. The main content area is titled 'Reminders' and displays two records. The first record is for 'Wednesday, March 22, 2017' at '12:00 AM' with the action 'Invite Kash to lunch' and the note 'test message'. The second record is for 'Wednesday, January 20, 2016' at '10:00 AM' with the action 'Send-email' and the note 'Encourage donor to renew recurring donation'. A red box highlights the green '+' icon at the top right of the 'Reminders' section, with a red arrow pointing to it from the text above. At the bottom right of the content area, it says '1 - 2 of 2 Records'.

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.



The screenshot shows the 'Donor Details' section of the Process Donation software. The top navigation bar includes links for DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. A user profile for 'KAYLEE' is visible on the right. The main content area is titled 'Reminders'. It lists two items:

- Wednesday, March 22, 2017**
🕒 12:00 AM
Invite Kash to lunch
test message
Actions: checkmark, edit, delete
- Wednesday, January 20, 2016**
🕒 10:00 AM
Send email
Encourage donor to renew recurring donation
Actions: checkmark, edit, delete

A red box highlights the 'Click here' link next to the second reminder's actions. Another red box highlights the 'Mark this Reminder as Incomplete' button above the second reminder's actions. The bottom right corner of the screen shows '1 - 2 of 2 Records'.

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.

The screenshot shows the 'Donor Details' section with a 'Reminders' list. A confirmation dialog box is overlaid on the screen, asking 'Are you sure you want to delete this reminder?'. It has 'Yes' and 'No' buttons. The background shows the same list of reminders as the previous screenshot, with one item visible: 'Wednesday, January 20, 2016' at 10:00 AM. The bottom right corner shows '1 - 1 of 1 Records'. The footer of the page includes the copyright notice '© 2014 - 2016 ProcessDonation. All rights reserved.'

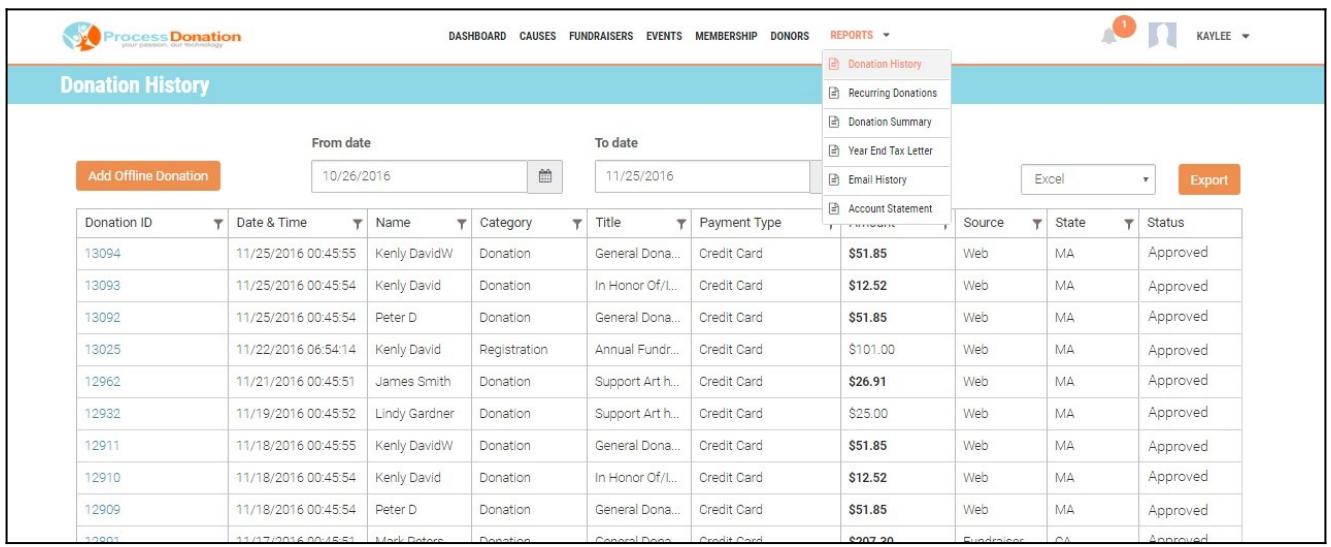
[PREVIOUS: DONOR](#)

DONATION HISTORY

(Standard, Premium, & Ultimate)

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

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



The screenshot shows the 'Donation History' report page. At the top, there is a navigation bar with links for DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. The REPORTS menu is open, showing options like 'Donation History' (which is selected), Recurring Donations, Donation Summary, Year End Tax Letter, Email History, and Account Statement. On the right side, there are buttons for 'Excel' and 'Export'. Below the navigation bar, there is a search bar with fields for 'From date' (10/26/2016) and 'To date' (11/25/2016), and a 'Search' button. A 'Add Offline Donation' button is also present. The main area displays a table of donation records:

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	Mandi Dutton	Donation	General Dona...	Credit Card	\$207.20	Fundraiser	CA	Approved

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

Donation History

From date: 04/19/2017 To date: 05/18/2017

Add Offline Donation | Search | Excel | CSV | PDF | Export

Donation ID	Date & Time	Name	Category	Title	Payment Type	Amount	Source	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 History

From date: 04/19/2017 To date: 05/18/2017

Add Offline Donation | Search | Excel | CSV | PDF | Export

Donation ID	Date & Time	Name	Category	Title	Payment Type	Amount	Source	State	Status
36511	Show items with value that:	Peters	Donation	General Dona...	Credit Card	\$207.30	Fundraiser	CA	Declined
36499		Kenly David	Donation	General Dona...	Credit Card	\$3.21	Web	RI	Declined
36489	Filter	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
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.

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

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	
▶ 21353	Kenly David	Credit Card	06/15/2017	3	\$6.00	Active	
▶ 11316	Nancy Taylor	Credit Card	05/23/2017	3	\$5.31	Active	
▶ 11237	Smith Peter	Credit Card	06/16/2017	4	\$3.00	Active	
▶ 11234	Peter David	Credit Card	01/16/2018	1	\$3.00	Active	
▶ 11233	Peter David	Credit Card	07/16/2017	2	\$3.00	Active	
▶ 11232	Kenly David	Credit Card	06/16/2017	4	\$3.00	Active	

The screenshot shows the 'Recurring Donations' section of the Process Donation software. At the top, there's a navigation bar with links for DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, and REPORTS. A user profile for 'KAYLEE' is visible on the right. Below the header, a blue banner says 'Recurring Donations'. On the right, there are buttons for 'Excel' and 'Export'. The main area is a table with columns: Recurring ID, Donor Name, Payment Type, Next Process Date, Applied Payments, Amount, Status, and Action. One row is highlighted in blue, showing Recurring ID 919, Donor Name Kenly DavidW, Payment Type Credit Card, Next Process Date 11/25/2016, Applied Payments 6, Amount \$50.00, Status Active, and Action (with a pencil icon). Below this table is another table with columns: Donation ID, Date, Cause, City, State, and Status. It lists six items: 13094 (Approved), 12911 (Approved), 12731 (Approved), 12541 (Approved), 12332 (Approved), and 11863 (Approved). A footer at the bottom of this section says '1 - 6 of 6 items'. At the very bottom of the screenshot, there are two links: 'NEXT: DONATION SUMMARY' and 'PREVIOUS: DONATION HISTORY'.

	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	
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 shows the 'Donation Summary' report page. At the top, there are date selection fields ('From date' and 'To date') with values '10/26/2016' and '11/25/2016' respectively, and a 'Search' button. There is also a checkbox for 'Include unpaid donations'. To the right of these fields is a dropdown menu under 'REPORTS' containing options: 'Donation History', 'Recurring Donations', 'Donation Summary' (which is highlighted in orange), 'Year End Tax Letter', 'Email History', and 'Account Statement'. Further to the right are buttons for 'Excel' (with a dropdown arrow) and 'Export'. Below the search area is a table with the following data:

Cause/Event	Raised Amount	Fee Amount	Donations	Refund	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 table, it says '1 - 3 of 3 Records'. At the very bottom of the page, there is a copyright notice: '© 2014 - 2016 ProcessDonation. All rights reserved.'

[**NEXT: YEAR END TAX LETTER**](#)

[**RECURRING DONATIONS**](#)

[**PREVIOUS:**](#)

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' page within the Process Donation software. At the top, there's a navigation bar with links for 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 (which is highlighted in red), Email History, and Account Statement. Below the navigation, the main content area has fields for 'Schedule Date *' (with a date input field and calendar icon), 'Subject *' (text input field), and 'Message *' (rich text editor with Bold, Italic, Underline buttons). At the bottom of the message area, there are 'Tags', '(Donor Name)', and '(Total Amount)' placeholder fields. A large orange 'Schedule Email' button is at the bottom right.

[**NEXT: EMAIL HISTORY**](#)

[**DONATION SUMMARY**](#)

[**PREVIOUS:**](#)

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' page of the Process Donation website. At the top, there is a navigation bar with links for DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, REPORTS (which is currently selected), and a user profile for GREG. Below the navigation is a search bar with a dropdown for 'Date' set to 'March, 2017', a 'Search' button, and an 'Excel' export button. Below the search bar is a table header row with columns for Date, Donation Amount, Refund Amount, Chargeback Amount, Chargeback Fee, Processing Fee, Net Donations, and Deposits. The main area below the header is currently empty, indicating no data has been loaded for the specified date range.

[**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.

Donation ID	Date & Time	Name	Category	Title	Payment Type	Amount	Source	State	Status
36511	04/19/2017 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
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.

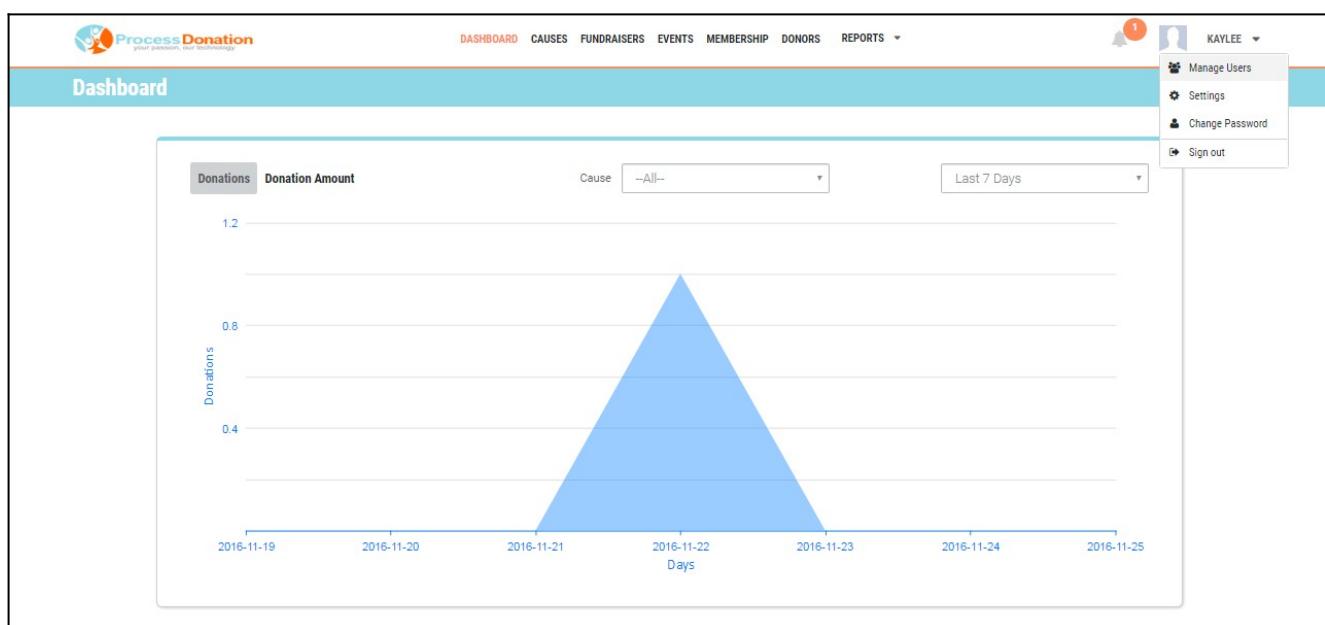
Donation ID	Date & Time	Name	Category	Title	Payment Type	Amount	Source	State	Status
36511	05/17/2017 05:10...	Mark Peters	Donation	General Dona...	Credit Card	\$207.30	Fundraiser	CA	Declined
36499	05/16/2017 05:10...	Kenly David	Donation	General Dona...	Credit Card	\$3.21	Web	RI	Declined
36489	05/16/2017 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

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

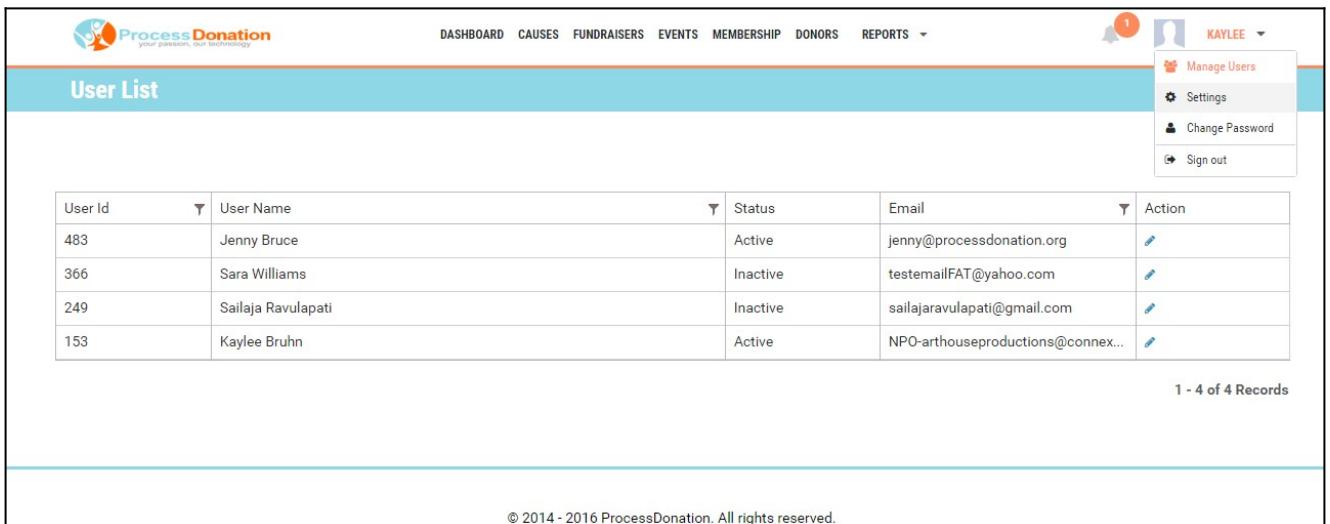
The User module is designed to give you the ability to create the users with Admin and User role permissions.

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.

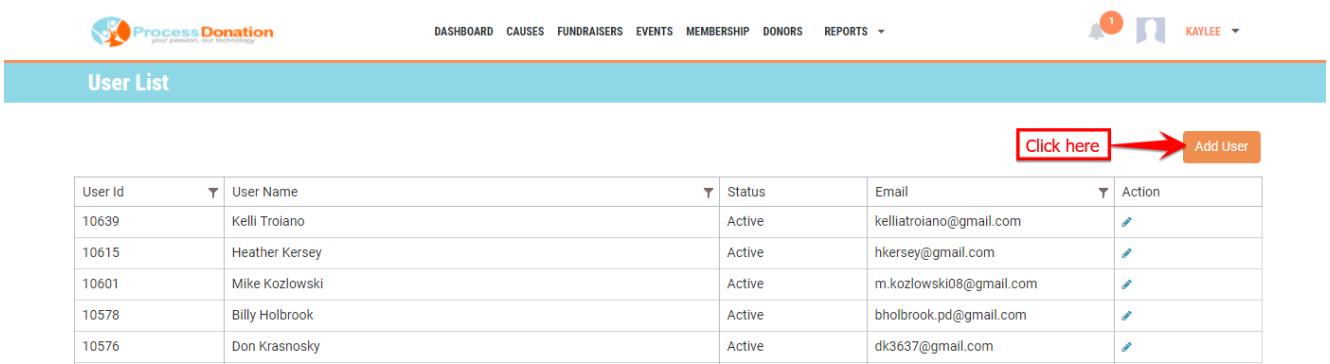


The screenshot shows the 'User List' page of the Process Donation application. The header includes the logo, navigation links (Dashboard, Causes, Fundraisers, Events, Membership, Donors, Reports), and a user dropdown for 'KAYLEE'. A red box highlights the 'Manage Users' link in the dropdown menu. The main content is a table with columns: User Id, User Name, Status, Email, and Action. The table contains five rows of user data. At the bottom, it says '1 - 4 of 4 Records' and '© 2014 - 2016 ProcessDonation. All rights reserved.'

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...	

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.



The screenshot shows the 'User List' page with a red arrow pointing from the 'Click here' label to the 'Add User' button. The rest of the page is identical to the previous screenshot, showing the user list table and the footer copyright information.

The screenshot shows the 'Add User' form. At the top, there is a header with the Process Donation logo and navigation links: DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, REPORTS, and a user profile for KAYLEE. Below the header, the form has fields for First Name, Last Name, Email, Phone Number, Address1, Address2, City, Zip / Postal Code, State, Role, and a checkbox for 'Make this user as Inactive'. At the bottom right are 'Save Your User' and 'Cancel' buttons.

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.

The screenshot shows the 'User List' page. At the top, there is a header with the Process Donation logo and navigation links: DASHBOARD, CAUSES, FUNDRAISERS, EVENTS, MEMBERSHIP, DONORS, REPORTS, and a user profile for KAYLEE. Below the header, the page title is 'User List'. A table lists users with columns for User Id, User Name, Status, Email, and Action. The 'Action' column contains edit icons. The second row's edit icon is highlighted with a red box and an arrow pointing to it.

User Id	User Name	Status	Email	Action
10639	Kelli Troiano	Active	kelliattroiano@gmail.com	
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.

The screenshot shows the 'Settings' page with the 'Customize Email' sidebar open, specifically the 'Donation' section. On the right, there's a table titled 'Customize Donor Emails' with six rows, each representing a different email template for donations. Each row has a checkbox, a 'Revert to default' button, and an eye icon. An 'Update Settings' button is at the bottom right of the table.

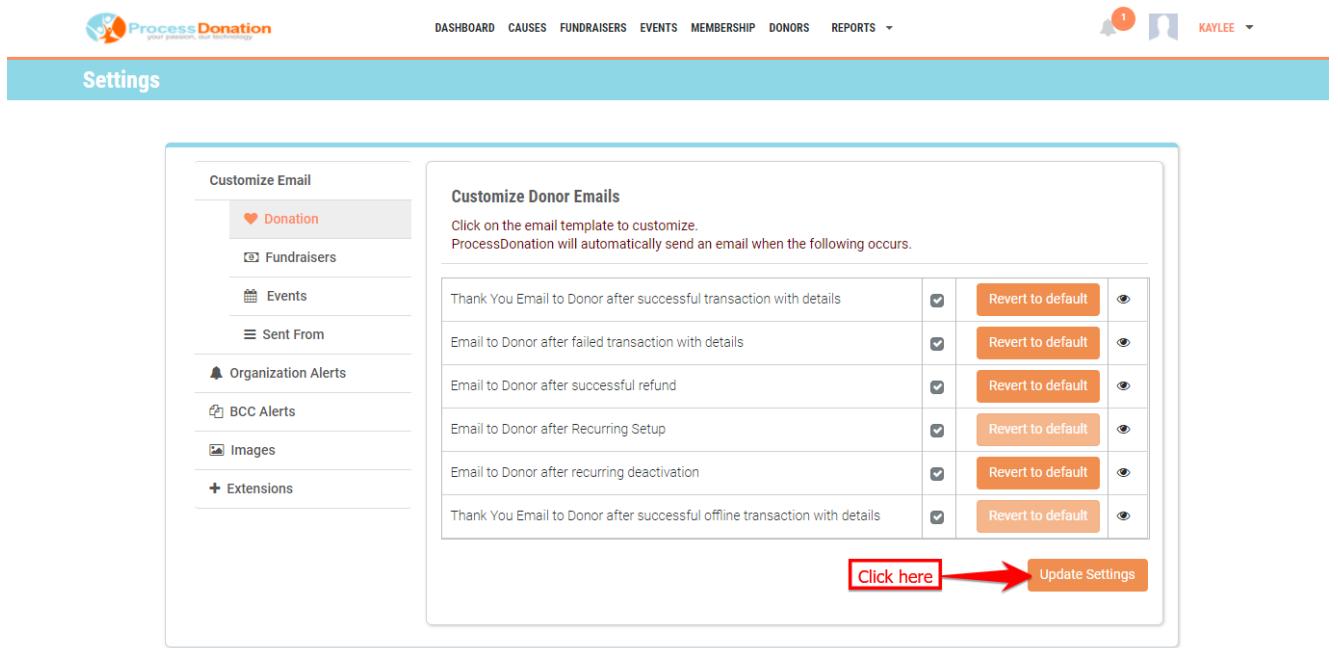
Email Template	Action	Action
Thank You Email to Donor after successful transaction with details	<input checked="" type="checkbox"/>	Revert to default
Email to Donor after failed transaction with details	<input checked="" type="checkbox"/>	Revert to default
Email to Donor after successful refund	<input 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

Update Settings

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

The screenshot shows the 'Email Preview' dialog box overlaid on the settings page. The dialog displays a sample email for a donation to 'Lt Col Arthur King Composite Squadron California Wing Civil Air Patrol'. The email includes the recipient's first name, a thank you message, processing details, and contact information. At the bottom of the dialog is an 'OK' button.

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



The screenshot shows the 'Customize Email' section for 'Fundraisers'. On the left, there's a sidebar with options like 'Customize Email', 'Donation', 'Fundraisers', 'Events', 'Sent From', 'Organization Alerts', 'BCC Alerts', 'Images', and 'Extensions'. The 'Fundraisers' option is selected. On the right, under 'Customize Donor Emails', there's a list of email templates with checkboxes and 'Revert to default' buttons. A red arrow points from the 'Click here' button to the 'Update Settings' button at the bottom.

Email Template	Action	Link
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.

The screenshot shows the 'Settings' page for 'Fundraisers'. On the left, a sidebar lists options: 'Customize Email' (with 'Donation', 'Fundraisers' selected, 'Events', 'Sent From', 'Organization Alerts', 'BCC Alerts', 'Images', and 'Extensions'), 'Customize Fundraiser Emails' (with a note about automatically sending emails for various events like successful transactions and invitations), and a 'Revert to default' button for each item. A 'Update Settings' button is at the bottom right.

Event Type	Status	Action
Successful Transaction (Fundraiser)	<input checked="" type="checkbox"/>	Revert to default
Fundraiser Invitation	<input checked="" type="checkbox"/>	Revert to default
Welcome email to newly added Fundraiser	<input checked="" type="checkbox"/>	Revert to default
Fundraiser - Invitation to Team Member	<input checked="" type="checkbox"/>	Revert to default
Invitation to Existing Fundraiser	<input checked="" type="checkbox"/>	Revert to default
Organization - Invitation to Team Member	<input checked="" type="checkbox"/>	Revert to default

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.

The screenshot shows the 'Settings' page for 'Events'. The sidebar and main content are identical to the 'Fundraisers' settings page, showing the 'Events' tab selected under 'Customize Email' and a list of customizable event-related emails with 'Revert to default' buttons.

Event Type	Status	Action
Registration Confirmation for Event	<input checked="" type="checkbox"/>	Revert to default
Approved Transaction email to Registrant	<input checked="" type="checkbox"/>	Revert to default
Declined Transaction email to Registrant	<input checked="" type="checkbox"/>	Revert to default
Registration Confirmation for Event using Pay Later Option	<input checked="" type="checkbox"/>	Revert to default
Email to Registrant after Recurring Setup	<input checked="" type="checkbox"/>	Revert to default
Declined Transaction email to Membership	<input type="checkbox"/>	Revert to default

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.

The screenshot shows the 'Settings' page of the Process Donation application. On the left, there is a sidebar titled 'Customize Email' with several options: 'Donation', 'Fundraisers', 'Events', 'Sent From' (which is highlighted with a blue border), 'Organization Alerts', 'BCC Alerts', 'Images', and 'Extensions'. On the right, there is a main panel titled 'Emails Sent From' with the sub-instruction 'Notifications will be sent from Email address listed for events/transactions occur.' Below this is a text input field containing 'kaylee@processdonation.org'. At the bottom right of the panel is an orange 'Update Settings' button.

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 (;).

The screenshot shows the 'Organization Alerts' section of the Process Donation settings. It lists various alert types with checkboxes for enabling them. The 'BCC Alerts' section is also visible.

Alert Type	Description	Status
Email after successful donation	ProcessDonation will automatically send an email to the organizer(s) when the following occurs	<input checked="" type="checkbox"/>
Email after successful refund to Donor		<input checked="" type="checkbox"/>
Email after successful recurring setup by donor		<input checked="" type="checkbox"/>
Email after recurring deactivation		<input checked="" type="checkbox"/>
Email after sending Fundraiser invitation		<input checked="" type="checkbox"/>
Email after successful registration		<input checked="" type="checkbox"/>
Email after failed donation transaction		<input checked="" type="checkbox"/>
Email after successful recurring setup by Registrant		<input checked="" type="checkbox"/>
Email after successful Membership Registration		<input checked="" type="checkbox"/>
Email after Membership recurring deactivation		<input type="checkbox"/>
Email after successful Membership Renewal		<input type="checkbox"/>

Organizer's Email: kaylee@processdonation.org
To add multiple email addresses, separate them by a semi colon (;)

Update Settings

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 of the Process Donation software. On the left, there's a sidebar with 'Customize Email' sections: 'Donation', 'Fundraisers', 'Events', 'Sent From', 'Organization Alerts', 'BCC Alerts' (which is selected and highlighted in blue), 'Images', and 'Extensions'. The main content area is titled 'BCC Alerts' and contains a list of email types with checkboxes. Most checkboxes are checked, indicated by a blue checkmark. The list includes:

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

Below this is a section for 'Organizer's Email' with an input field containing 'kaylee@processdonation.org' and a note: 'To add multiple email addresses, separate them by a semi colon (;)'. At the bottom right is an orange 'Update Settings' button.

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.

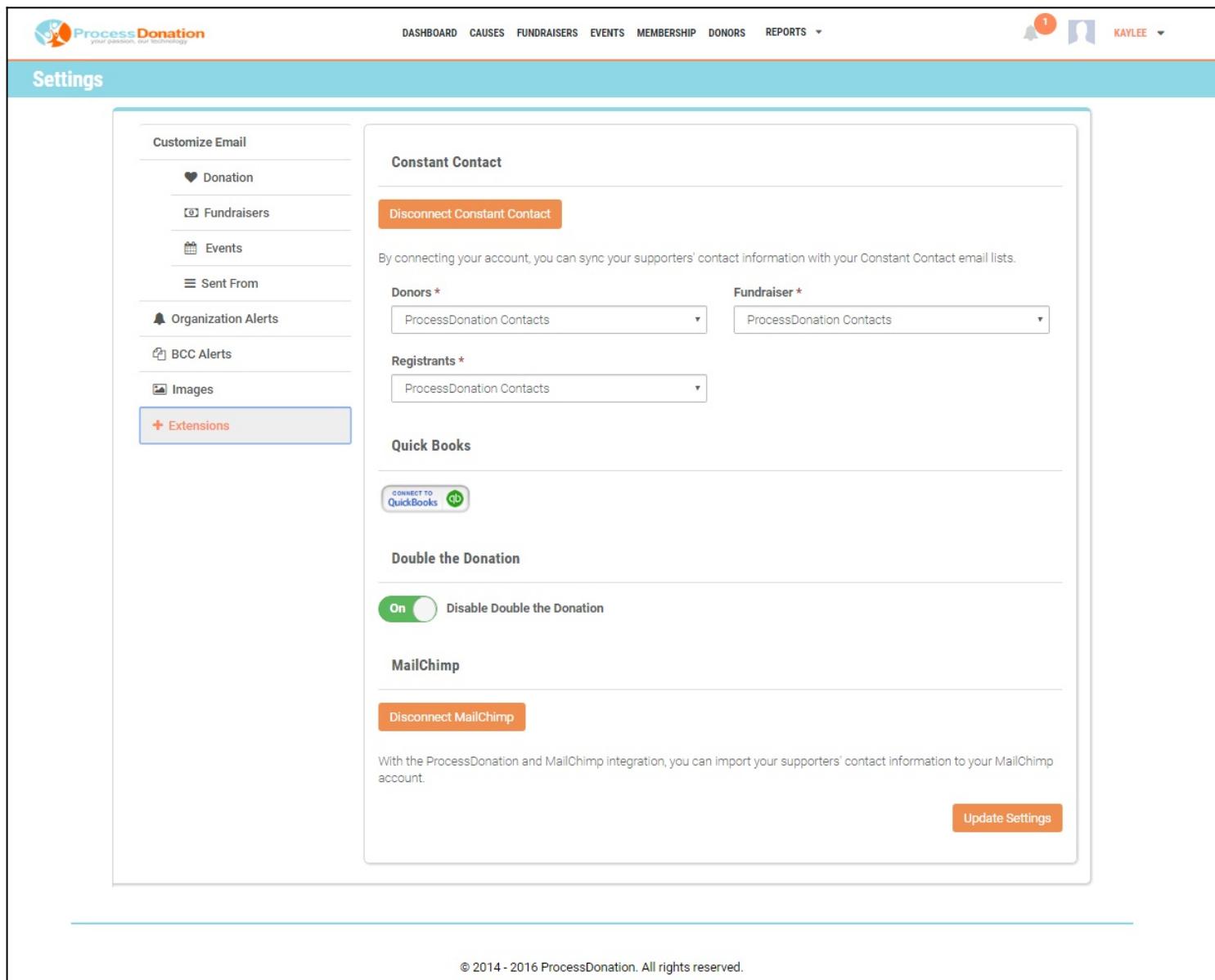
Fundraiser Page Logo

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

The screenshot shows the 'Settings' page of the Process Donation platform. On the left, there's a sidebar with options like 'Customize Email', 'Fundraisers', 'Events', 'Sent From', 'Organization Alerts', 'BCC Alerts', and 'Images'. The 'Images' option is highlighted with a blue border. The main area has a teal header 'Upload Images'. Under 'Email Header', it says 'This image will be displayed on emails to donors, fundraisers and event registrants. Recommended size is 700x95.' Below this is a file input field with a 'Choose file' button. Two logos are shown: one for 'Lt Col Arthur King Composite Sq CALIFORNIA WING CIVIL AIR' and another for 'Lt Col Arthur King Composite Sq CALIFORNIA WING CIVIL AIR'. Under 'Fundraiser page Logo', it says 'This image will be displayed on all fundraiser pages. Recommended size is 200x65.' Below this is another file input field with a 'Choose file' button. A logo for 'ART HOUSE' is shown. At the bottom right is an orange 'Update Settings' button.

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 of the Process Donation application. On the left, there's a sidebar with 'Customize Email' options: Donation, Fundraisers, Events, Sent From, Organization Alerts, BCC Alerts, Images, and Extensions (which is highlighted with a blue box). The main area has two sections: 'Constant Contact' and 'Quick Books'. Under Constant Contact, there's a 'Disconnect Constant Contact' button. Below it, there are dropdown menus for 'Donors *' (set to 'ProcessDonation Contacts') and 'Fundraiser *' (set to 'ProcessDonation Contacts'). There's also a dropdown for 'Registrants *' (set to 'ProcessDonation Contacts'). A 'CONNECT TO QuickBooks' button is present. Under 'Quick Books', there's a 'Double the Donation' section with an 'On' toggle switch (which is turned on) and a 'Disable Double the Donation' link. Below that is a 'MailChimp' section with a 'Disconnect MailChimp' button. A note says: 'With the ProcessDonation and MailChimp integration, you can import your supporters' contact information to your MailChimp account.' At the bottom right of this section is an 'Update Settings' button. At the very bottom of the page, a copyright notice reads: '© 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' form on the Process Donation website. The form includes fields for 'Current Password*', 'New Password*', and 'Confirm Password*'. To the right of the 'New Password*' field is a callout box detailing password requirements: 'Password must meet the following requirements:' followed by six items: 'Password between 6-14 characters', 'At least one uppercase letter', 'At least one lowercase letter', 'At least one number', 'At least one special character', and 'At least one character'. A 'Submit' button is located at the bottom right of the form area. At the very bottom of the page, there is a copyright notice: '© 2014 - 2016 ProcessDonation. All rights reserved.'

[Previous: Settings](#)