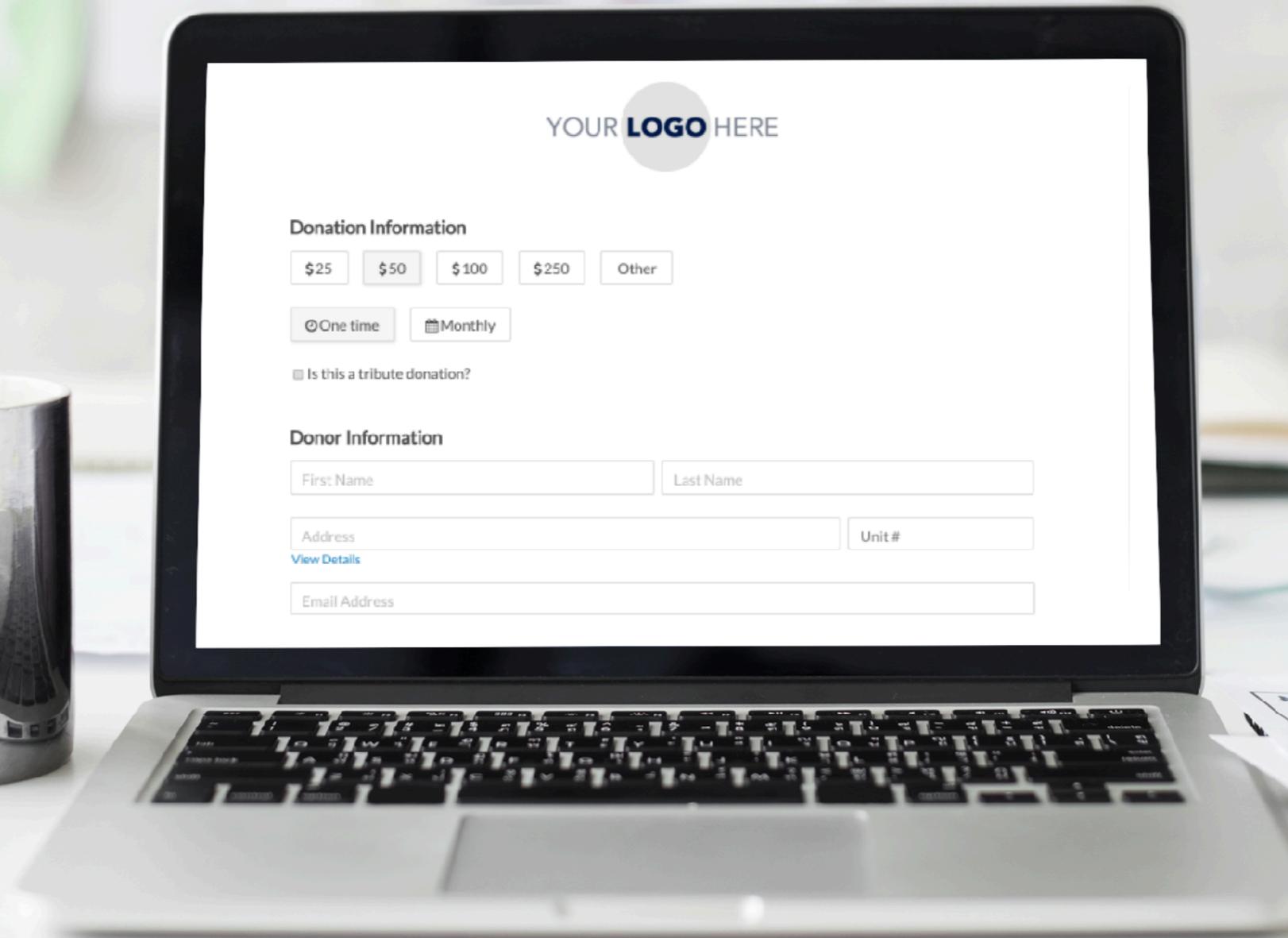


Create Forms

A CharityEngine Training Document



The image shows a laptop on a desk with a silver mug, a green box, and some papers. The laptop screen displays a donation form interface. At the top of the form is a placeholder for a logo, labeled "YOUR LOGO HERE". Below this is the "Donation Information" section, which includes five buttons for donation amounts: "\$25", "\$50", "\$100", "\$250", and "Other". There are also two buttons for frequency: "One time" (selected) and "Monthly". A checkbox labeled "Is this a tribute donation?" is present. The "Donor Information" section follows, with input fields for "First Name", "Last Name", "Address", "Unit #", and "Email Address". A "View Details" link is located below the "Address" field.

YOUR LOGO HERE

Donation Information

One time Monthly

Is this a tribute donation?

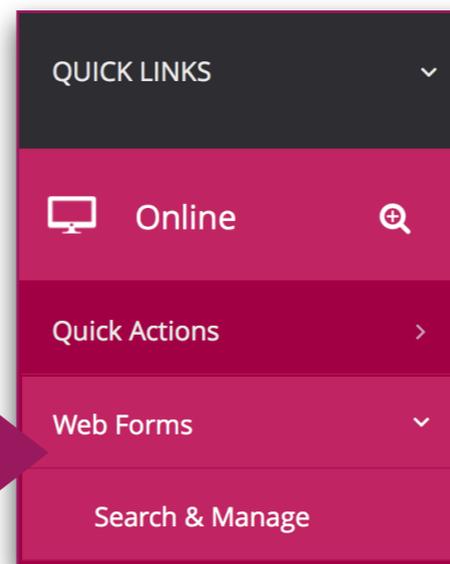
Donor Information

[View Details](#)

Table Of Contents

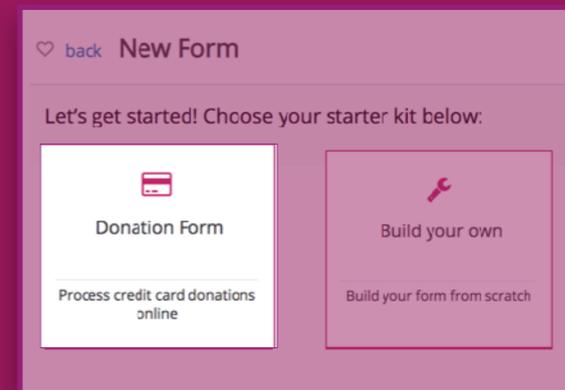
1. **Creating a Donation Form: What's Out of the Box?**
2. **Post Transaction: What's Out of the Box?**
3. **Pro Tips** (Good ideas worth doing when creating forms)
 - A. Tip 1! Rename Your Form
 - B. Tip 2! Edit the Set Tab
 - C. Tip 3! Add PayPal®
 - D. Tip 4! Add Tags, Groups & Lists for auto-creation
4. **Using Email Auto Responders**
 - E. Option 1: Use what's out of the box
 - F. Option 2: Select an already-created Favorite
 - G. Option 3: Design your own new one
5. **Using the WYSIWYG editor for Forms & Emails**
 - H. Designing with the WYSIWYG
 - I. Tips for Using the WYSIWYG
 - J. Working with Images
 - K. Forms: Adding Images or text
 - L. Forms: Editing Section & Field Labels
 - M. Editing Donation Amounts

Create New Forms in Quick Actions.
Once your form is created, find it in
Web Forms > Search & Manage

A screenshot of a donation form. At the top, it says 'YOUR LOGO HERE' with a placeholder circle. The form is divided into sections: 'Donation Information' with buttons for '\$25', '\$50', '\$100', '\$250', and 'Other', and radio buttons for 'One time' and 'Monthly'; a checkbox for 'Is this a tribute donation?'; 'Donor Information' with fields for 'First Name', 'Last Name', 'Address', and 'Unit #', a 'Show Details' link, and an 'Email Address' field; and 'Payment Information' with radio buttons for 'Credit Card' and 'Electronic Check', a 'Card Number' field with logos for Visa, Mastercard, American Express, and Discover, and a year dropdown set to '2018'. At the bottom, there is a checkbox for 'Is your billing info different?' and a 'Give \$50 One time' button.

Create a Donation Form

Here's what you now get right out of the box when you click the Donation Form box on Create a New Form:



2. Donation Tools

Editable Donation Buttons
One-time or Monthly Giving
Tribute Donations w

4. Donor Fields

First & Last Name
Single-line entry address*
Email fields with validation
Tribute Donations

1. Your logo

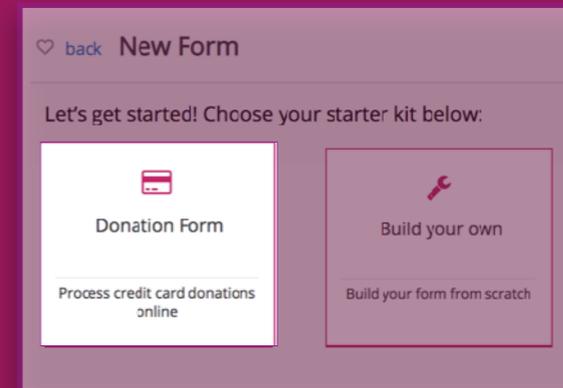
3. Tributes

Dynamic tribute button
Dynamic fields for gathering
mailing address, email address, or
Don't Send for acknowledgements

5. Billing Tools

Credit Card & ACH Billing
PayPal option *
Option for different billing address

Here are the Post Transaction Capabilities that will also be created right out of the box:



Auto-Created Success & Decline Transaction Pages

YOUR **LOGO** HERE

Your donation has been processed successfully.

Your Information
Name: ^^TRANSACTION_FIRSTNAME^^ ^^TRANSACTION_LASTNAME^^
Address: ^^TRANSACTION_ADDRESSLINE1^^ ^^TRANSACTION_ADDRESSLINE2^^
^^TRANSACTION_CITY^^, ^^TRANSACTION_STATE^^ ^^TRANSACTION_ZIP^^
^^TRANSACTION_COUNTRY^^
Email: ^^TRANSACTION_EMAIL_ADDRESS^^
Phone: ^^TRANSACTION_PHONE^^

Gift Information
Payment ID: ^^TRANSACTION_ID^^
Payment Date: ^^TRANSACTION_DATETIME^^ EST
Donation Amount: ^^TRANSACTION_AMOUNT^^

Auto-created Acknowledgement Email

Dear Charles,

Thank you for your contribution of \$50.00 received on 11/5/2018 5:06:19 PM.

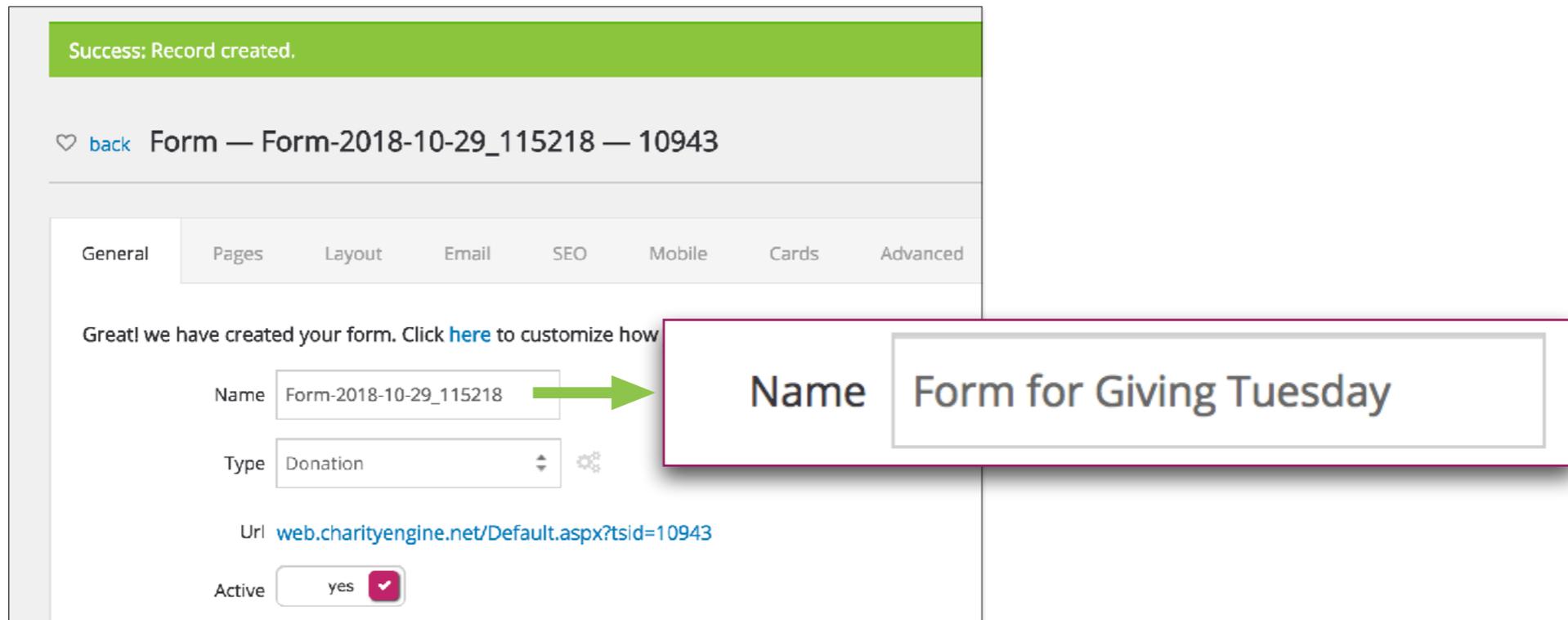
No goods or services were provided in return for the gift.

Here is your official receipt:

Your Information
Name: Charles Harrison
Address: 8200 GREENSBORO DR
MC LEAN, Virginia 22102-3892
United States
Email: charrison@charityengine.net
Phone:

Gift Information
Payment ID: 53044192
Payment Date: 11/5/2018 5:06:19 PM EST
Donation Amount: \$50.00

Pro Tip 1! Rename your form!



Success: Record created.

♥ [back](#) Form — Form-2018-10-29_115218 — 10943

General Pages Layout Email SEO Mobile Cards Advanced

Great! we have created your form. Click [here](#) to customize how

Name →

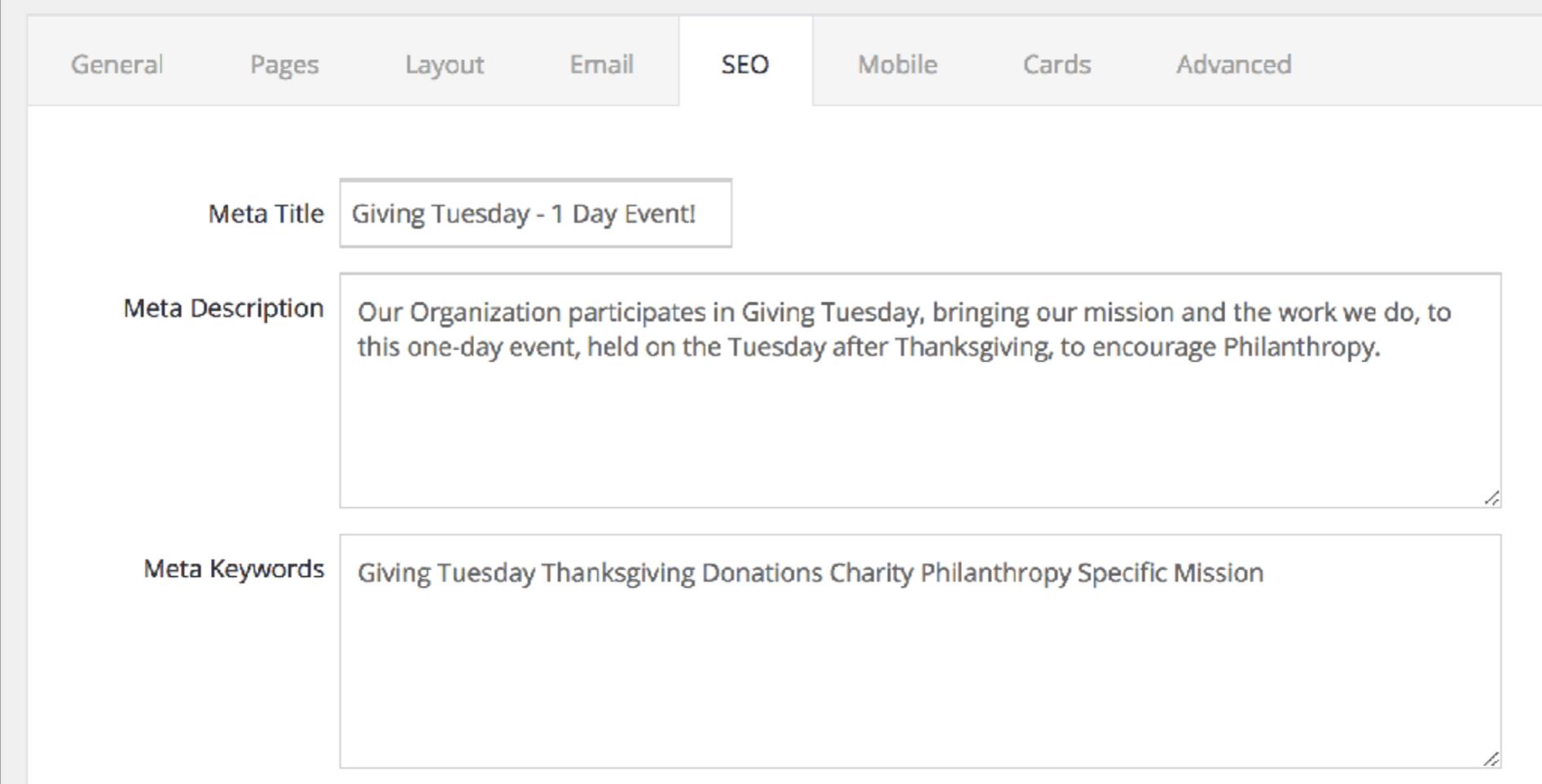
Type

Url web.charityengine.net/Default.aspx?tsid=10943

Active

When you create the form, it will automatically name it based on the date it was created. Before you do anything else, **rename it to something that's easier for you to remember in the future.** This name is not seen on the outside. This is only for your internal form management.

Pro Tip 2! Edit the SEO tab!



The image shows a screenshot of a CMS interface with the 'SEO' tab selected. The interface includes a navigation bar with tabs for 'General', 'Pages', 'Layout', 'Email', 'SEO', 'Mobile', 'Cards', and 'Advanced'. Below the navigation bar, there are three input fields for meta tags:

- Meta Title:** Giving Tuesday - 1 Day Event!
- Meta Description:** Our Organization participates in Giving Tuesday, bringing our mission and the work we do, to this one-day event, held on the Tuesday after Thanksgiving, to encourage Philanthropy.
- Meta Keywords:** Giving Tuesday Thanksgiving Donations Charity Philanthropy Specific Mission

Meta Tags are the names that appear on the browser Tab. Adding a Description and Keywords will help with Search Optimization.

Pro Tip 3! Add PayPal® if needed!

If you also want to have PayPal® as a payment option on the form, check the box on the Advanced>Payments>General Tab.

Enable PayPal



General | Pages | Layout | Email | SEO | Mobile | Cards | Advanced

Payments | Security | Promos | Data | Regions | Pledges | Sustainers

General | Processors

Enable Payment Processing

Enable One Click Giving

Enable PayPal

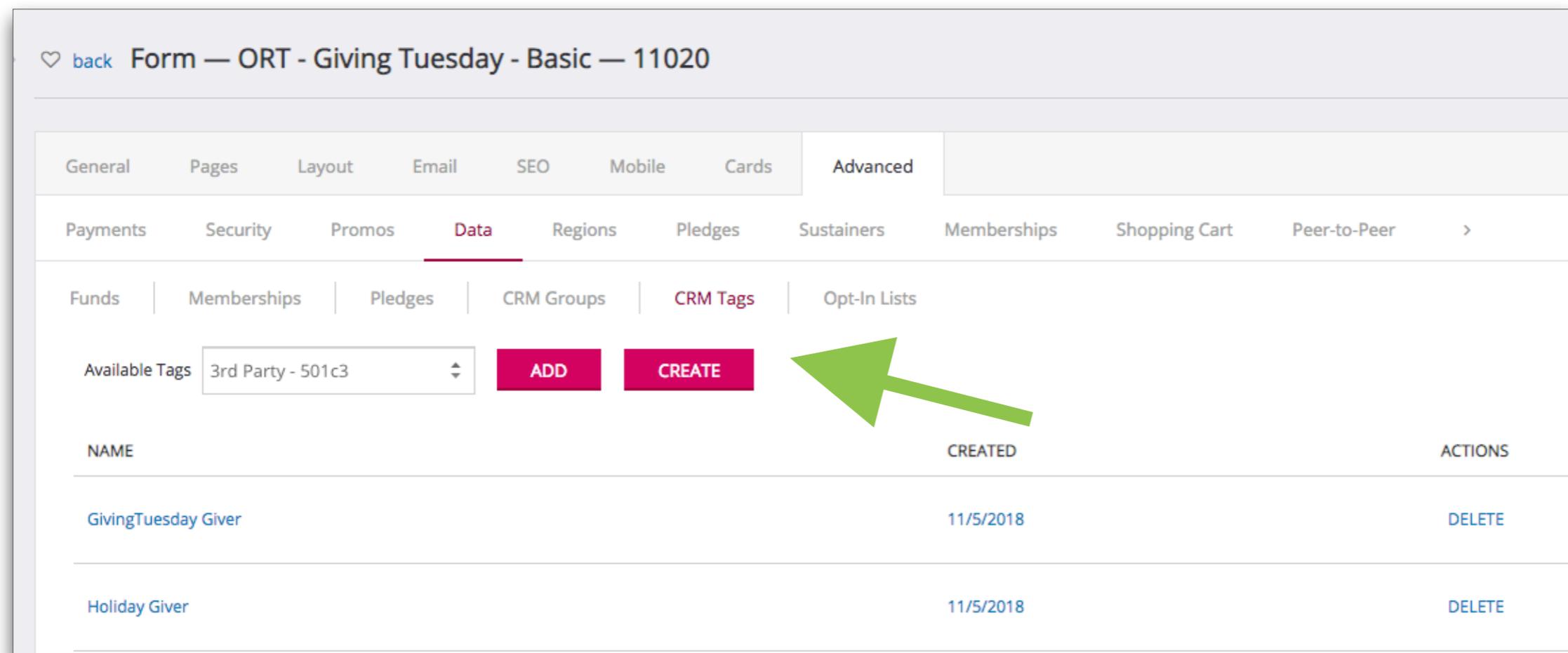
Force Minimum Amount 0.00 (optional, 0 = use default account settings)

Min. Amount Message (optional - overrides d

Pro Tip 4! Add Tags, Groups or Lists

You can **automatically add attributions like Tags, Groups or put people on Lists** by virtue of the form they filled out. Go To **Advanced>Data>** and then select the Data point to add.

In the sample below, since this is a GivingTuesday focused form, we are adding the tags “GivingTuesday Giver” and “Holiday Giver” so that we can easily communicate to them around those events in the future!



back Form — ORT - Giving Tuesday - Basic — 11020

General Pages Layout Email SEO Mobile Cards Advanced

Payments Security Promos **Data** Regions Pledges Sustainers Memberships Shopping Cart Peer-to-Peer >

Funds Memberships Pledges CRM Groups **CRM Tags** Opt-In Lists

Available Tags 3rd Party - 501c3 **ADD** **CREATE**

NAME	CREATED	ACTIONS
GivingTuesday Giver	11/5/2018	DELETE
Holiday Giver	11/5/2018	DELETE

Next: Using email autoresponders

When you create a form, a “Thank You” email will be included automatically.

- includes all of the tokens from the form
- includes tax information
- **ability to add personalization and branding**

[Return To Table of Contents](#)

Dear Charles,

Thank you for your contribution of \$50.00 received on 11/5/2018 5:06:19 PM.

No goods or services were provided in return for the gift.

Here is your official receipt:

Your Information

Name: Charles Harrison

Address: 8200 GREENSBORO

MC LEAN, Virginia 22102-389

United States

Email: charrison@charityengin

Phone:

Gift Information

Payment ID: 53044192

Payment Date: 11/5/2018 5:06

Donation Amount: \$50.00

Dear ^^TRANSACTION_FIRSTNAME^^,

On behalf of Gerry and everyone at the Giraffe sanctuary thank you for making **Giving Tuesday 2018** a success with your gift of ^^TRANSACTION_AMOUNT^^.

Sincerely,
Joe Gigantic



Here is your information for your personal records.

Name: ^^TRANSACTION_FIRSTNAME^^
^^TRANSACTION_LASTNAME^^
Address: ^^TRANSACTION_ADDRESSLINE1^^
^^TRANSACTION_ADDRESSLINE2^^

Option 1. Use the **Out-of-the-box** responders

If you want to use out-of-the-box auto-responders... you're done!

Template — Form-2018-10-29_115218 Thank You Email — 3477

General HTML Email Content Text Email Content

File Edit View Insert Format Table

Undo Redo Bold Italic Strikethrough Verdana 11pt Text Color Background Color Link Image Bulleted List Numbered List Indent Decrease Indent Increase Paragraph

Insert Media

Dear ^^TRANSACTION_FIRSTNAME^^,

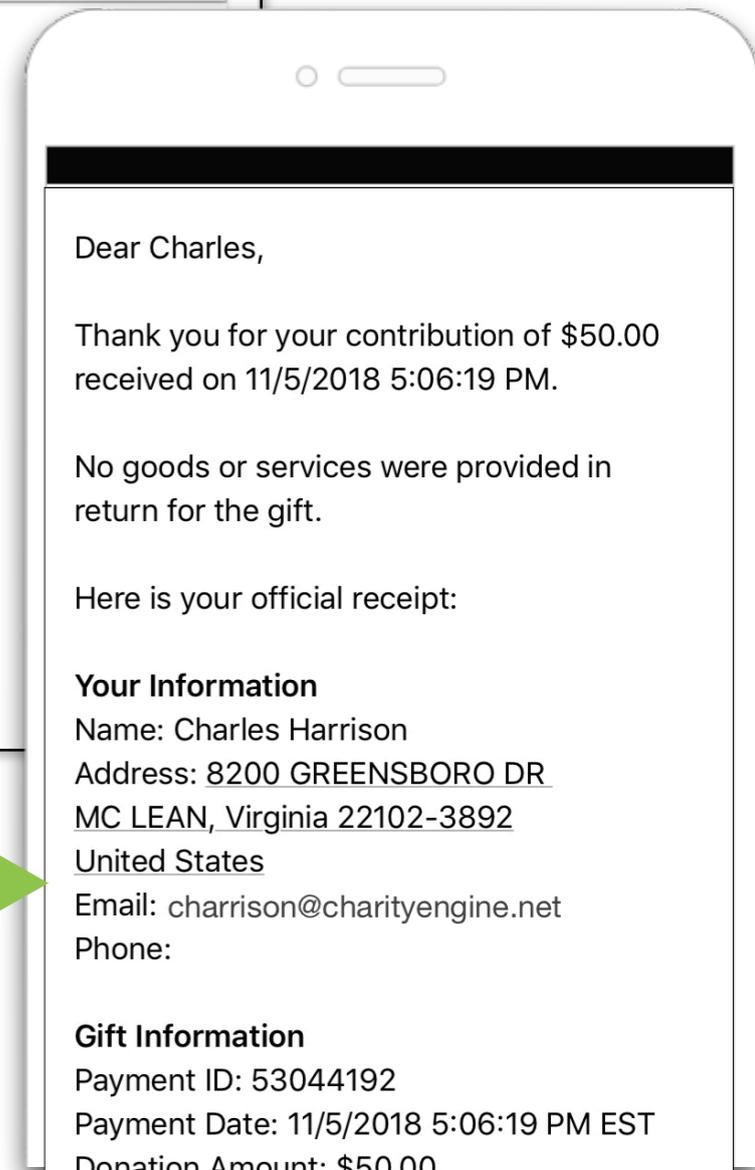
Thank you for your ^^recurringFrequencyFriendly^^ contribution of ^^TRANSACTION_AMOUNT^^ received on ^^TRANSACTION_DATETIME^^.

No goods or services were provided in return for the gift.

Here is your official receipt:

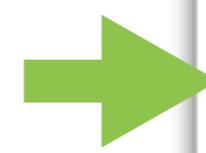
Your Information
Name: ^^TRANSACTION_FIRSTNAME^^ ^^TRANSACTION_LASTNAME^^
Address: ^^TRANSACTION_ADDRESSLINE1^^ ^^TRANSACTION_ADDRESSLINE2^^
^^TRANSACTION_CITY^^, ^^TRANSACTION_STATE^^ ^^TRANSACTION_ZIP^^
^^TRANSACTION_COUNTRY^^
Email: ^^TRANSACTION_EMAIL_ADDRESS^^
Phone: ^^TRANSACTION_PHONE^^

Gift Information
Payment ID: ^^TRANSACTION_ID^^
Payment Date: ^^TRANSACTION_DATETIME^^ EST
Donation Amount: ^^TRANSACTION_AMOUNT^^ ^^recurringFrequencyFriendly^^



The Standard Donation Email

The form will include a basic auto-responder called Standard Donation Email. It will be automatically triggered after donations are made, even if you don't do a thing!



Option 2. Use a favorite

If you already have a favorite auto-responder...**Select it from the drop down.**

back Form — Form for Giving Tuesday — 10943

General Pages Layout **Email** SEO Mobile Cards Advanced

▼ Donor or Constituent Auto-Responder

Send Confirmation yes (send message to constituent upon successful transaction)

Email Message

Subject

Display Name

Reply To (optional email if recipient clicks reply)

Log receipt acknowledgment both none
(both will log as receipt and mark transaction as do not acknowledge)

Email Message

- Donation Tribute Acknowledgement
- ✓ Standard Donation Email
- Fundraising Portal Registration
- Standard Thank You for Old Rag Trust**
- TY Volunteer Submission

Where do you find the Message Templates?
Look in **Configuration** under **Design & Message > Templates**

QUICK LINKS

- Design
- Pledges
- Sustainers
- Accounting
- Campaigns
- Events
- Advocacy
- Online
- Design & Messages
- Templates
- Mobile Pay

back Design Templates

ACTIVE FILTERS Active: yes

Search Old Rag

Class custom system

Type All

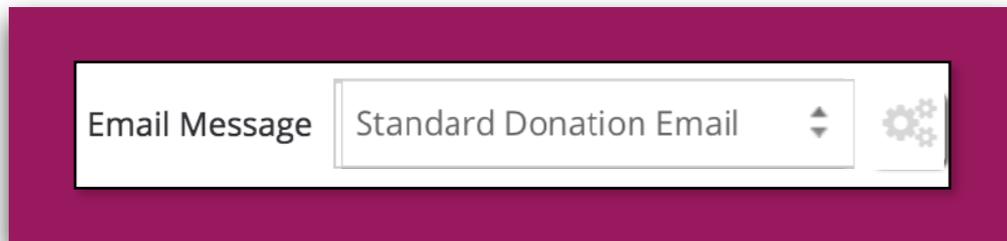
Dates All

Sort by Name

NAME	CLASS	TYPE	FORMS	ACTIVE	CREATED	ACTIONS
Old Rag- GivingTuesday Thank you - From Eleanor	Custom	Receipt or Acknowledgment Message	1	Yes	11/5/2018	...
Old Rag- GivingTuesday Thank you - From Eleanor-With Conditional Content	Custom	Receipt or Acknowledgment Message	1	Yes	11/6/2018	...
Old Rag Trust - General Acknowledgement	Custom	Receipt or Acknowledgment Message	0	Yes	11/5/2018	...
Old Rag Trust - General Acknowledgement from Word	Custom	Receipt or Acknowledgment Message	0	Yes	11/5/2018	...

Option 3. Design branded responders

To create a new auto-responder...roll over the **Grey Gears** next to **Email Message**



Click the Copy icon to start a new Message.
This will copy over the Tokens from your new form so you don't have to design from Scratch.

A screenshot of the 'Form for Giving Tuesday' configuration page. The 'Email' tab is selected. The 'Donor or Constituent Auto-Responder' section is expanded, showing the 'Email Message' dropdown set to 'Standard Donation Email' with a gear icon next to it. Other fields include 'Subject' (Thank you), 'Display Name' (Your Organization Name), and 'Reply To' (name@email.com). There are also radio buttons for 'Log' (receipt, acknowledgment, both, none).

Copy the Email Message Template

You cannot edit the **Standard Donation Email** that comes with the form. Instead, just click the copy icon. This will automatically bring up a copy to work from where you can make any edits.



Edit the Email Message Template

Once you've copied the Standard Donation Email to create a new one, this icon will allow you to make any edits in the future.

Create a new Email Message from Scratch



This button means Create a New Message. However, it's probably easiest to copy email messages you've already created since they will be pre-populated with the right fields for this form. That said, you can do whatever you want so if you want to create an entirely new one, go ahead!

Next: Using the WYSIWYG editor for Forms & Emails

WYSIWYG refers to “What You See Is What You Get” and refers to designing emails and forms. It means the window in which you are laying out the design will look like what the final design will look like.

In this section, we will highlight tips on adding images and text design to your forms and emails.

[Return To Table of Contents](#)



#givingtuesday @oldragtrust



This Tuesday,
Invest in a world where access to
the diamond of the Blue Ridge is forever.

How much can we count on you for?

\$25

\$50

\$100

\$250

One time

Monthly

Is this a tribute donation?

Donor Information

Charles

Thank you George >

Eleanor Franklin, Old Rag Trust
to gwashington



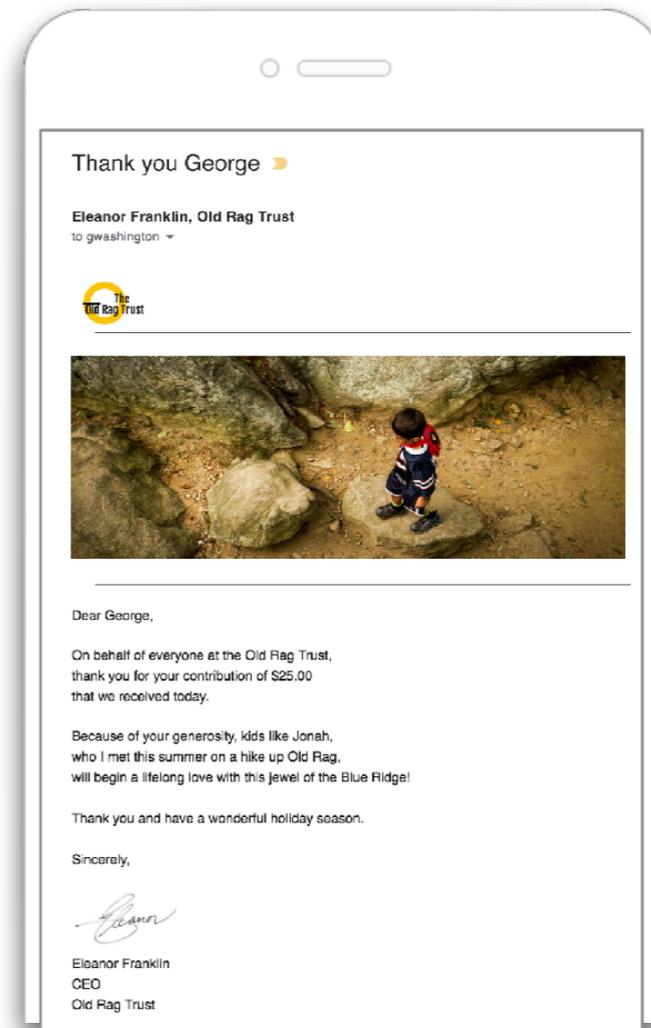
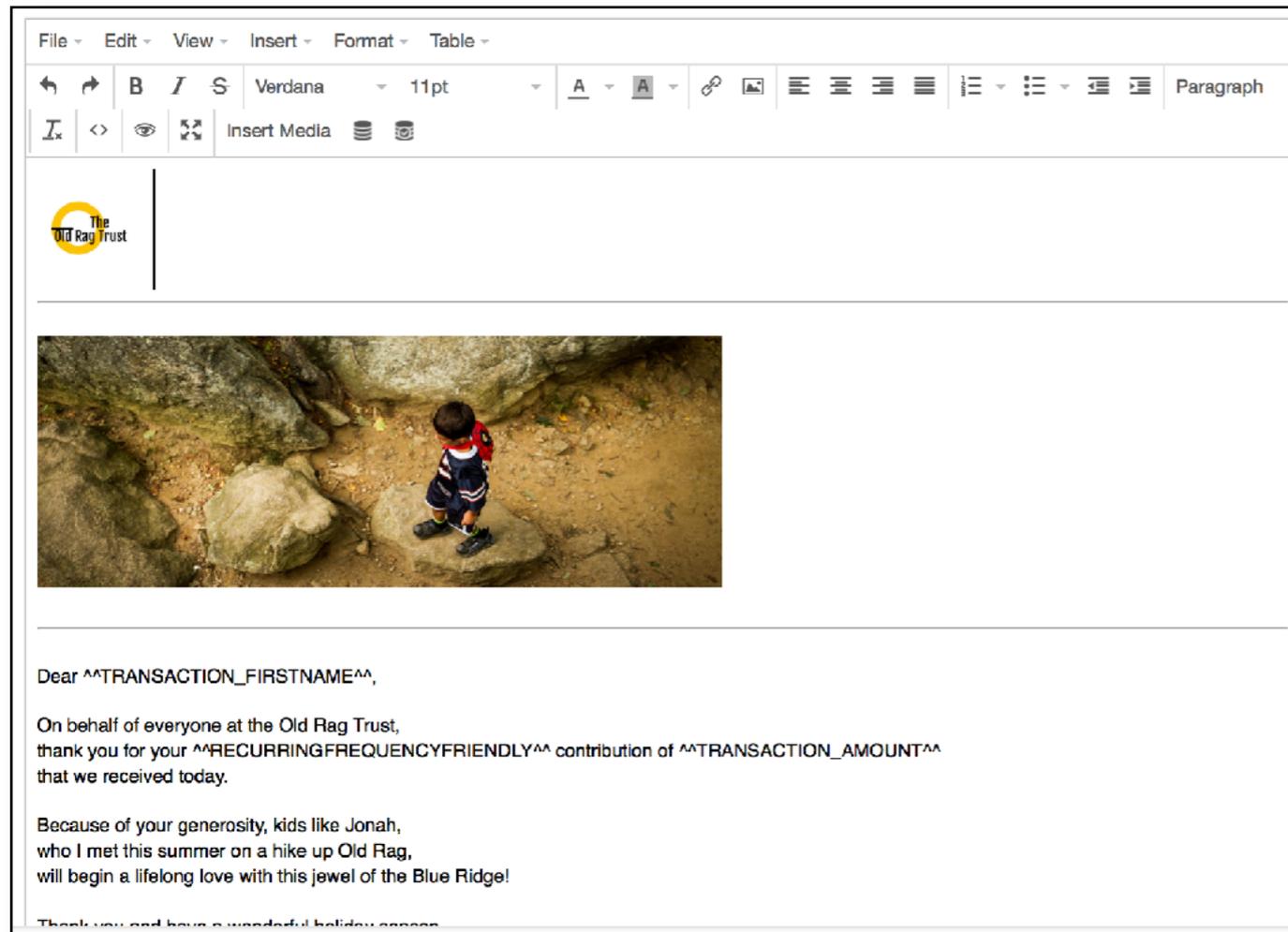
Dear George,

On behalf of everyone at the Old Rag Trust,
thank you for your contribution of \$25.00
that we received today.

Because of your generosity, kids like Jonah,

Designing with the WYSIWYG.

In this sample, we copied the Standard Donation Email and added our own language and an email to create a branded email for The Old Rag Trust that is more personalized and includes more targeted language. This was created entirely in the WYSIWYG.



- Added Old Rag Trust logo
- Changed the font size and color
- Inserted images
- inserted horizontal lines

- Inserted CEO's signature from .png
- Used the Transaction Tokens including the First Name in the Subject Line.

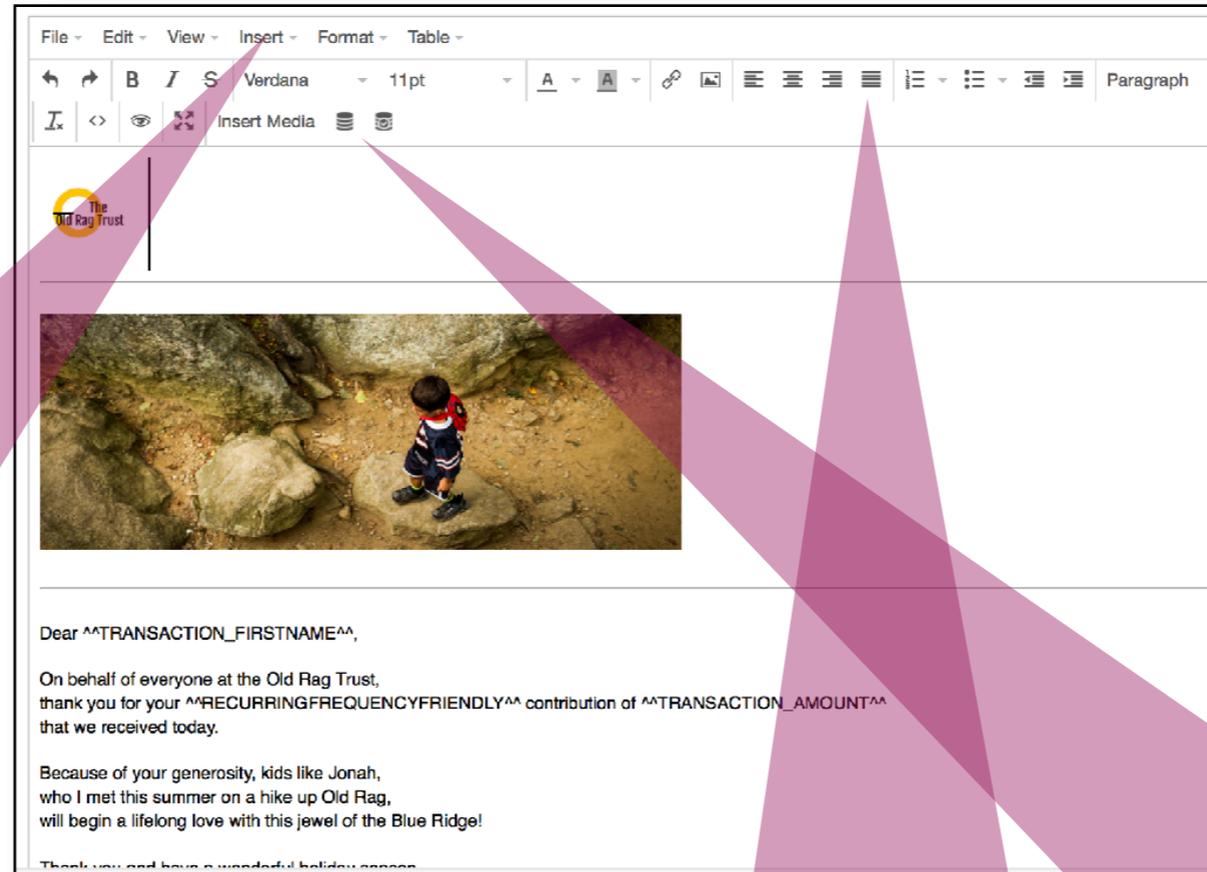
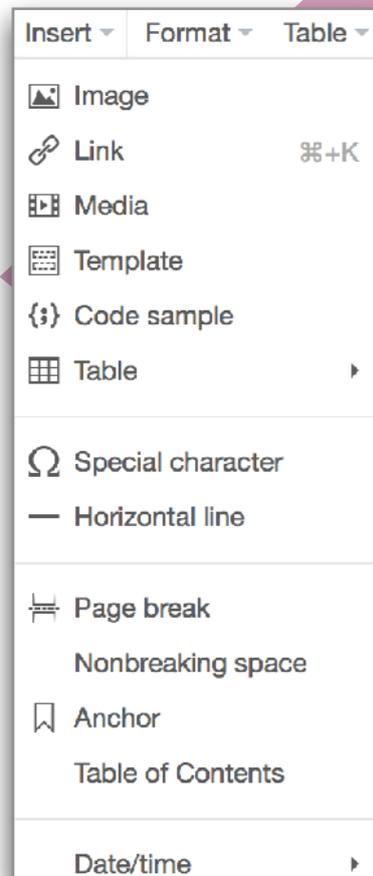
Tips for using the WYSIWYG.

The WYSIWYG editor works relatively similarly for emails and forms. This slide shows Emails.

Insert Menu

Use this dropdown for adding design elements:

- Images
- Tables
- Media
- Horizontal Lines

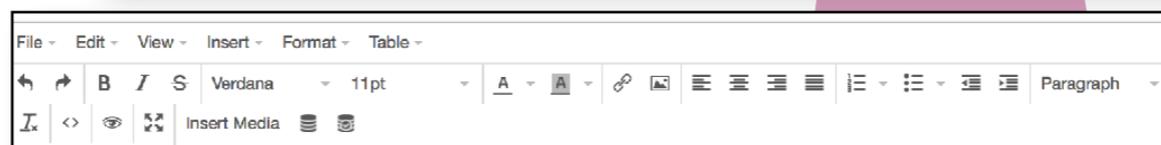


Insert Merge Tokens

Use this dropdown for adding dynamic tokens that will fill in based on the transaction data:

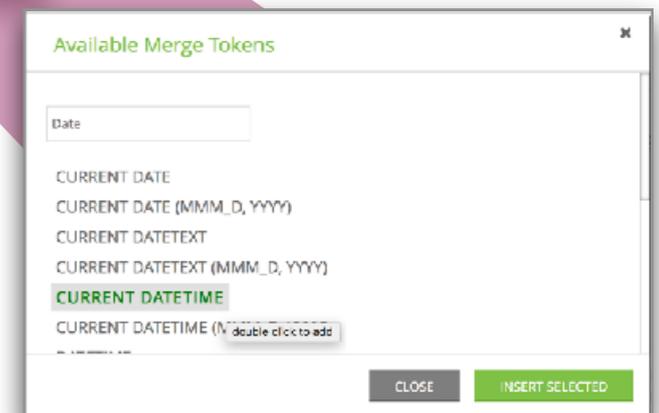
Select the fields you want to add. Fields highlighted in green will be inserted. Then click Insert Selected.

You can continue to add merge tokens as needed.



Layout Bar

If you've ever created a word document, you'll know how to use this for layouts!

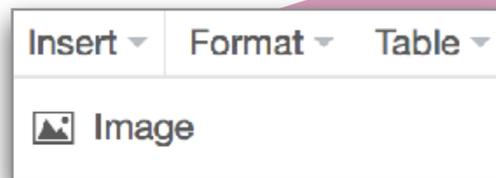


Working with Images

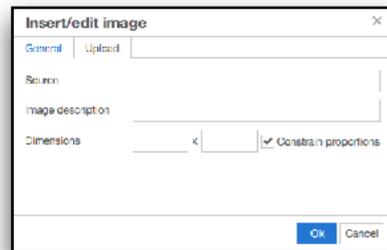
If you want to include images, here are some tips on adding and editing:

Insert Image

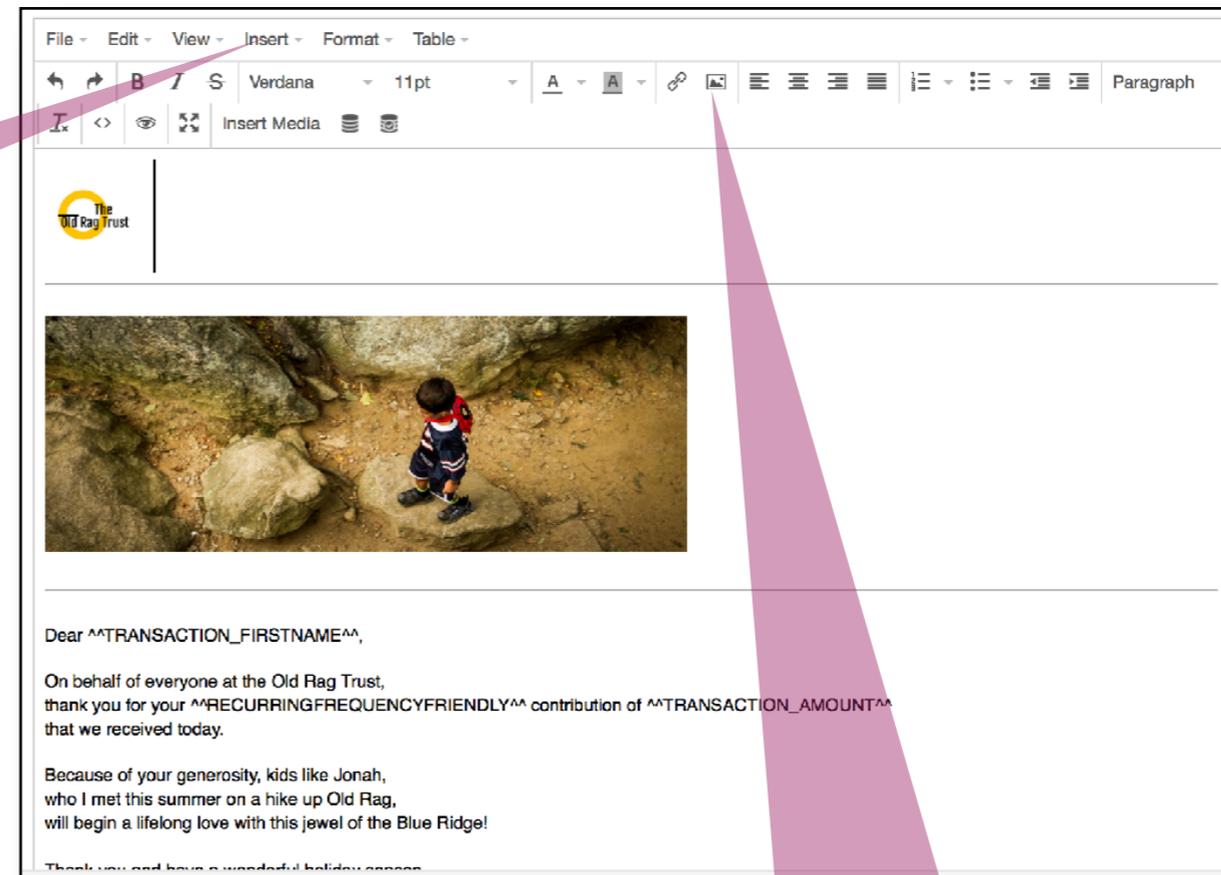
The first time you insert an image, do it from the Insert Menu.



You can either use a URL of that image:



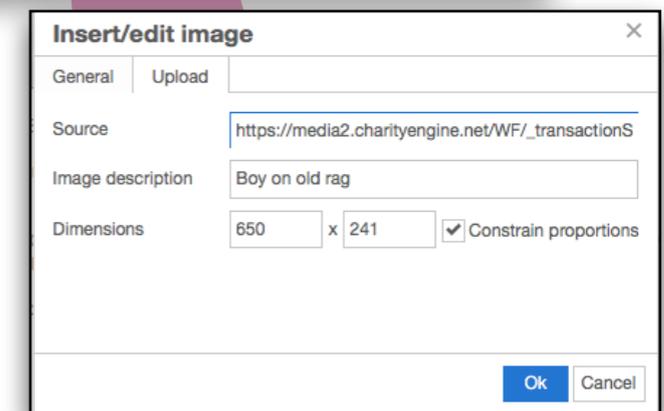
Or upload from your desktop.



Edit Image

Once you've inserted the image, you can edit it using the Image icon in the Layout bar.

You can also use the Left, Center, and Right Justification icons to place the image in the email window.



Important!
To ensure that the image fits properly in the email, make sure that the dimensions of the image, when you upload, are configured to no more than 700 pixels wide.



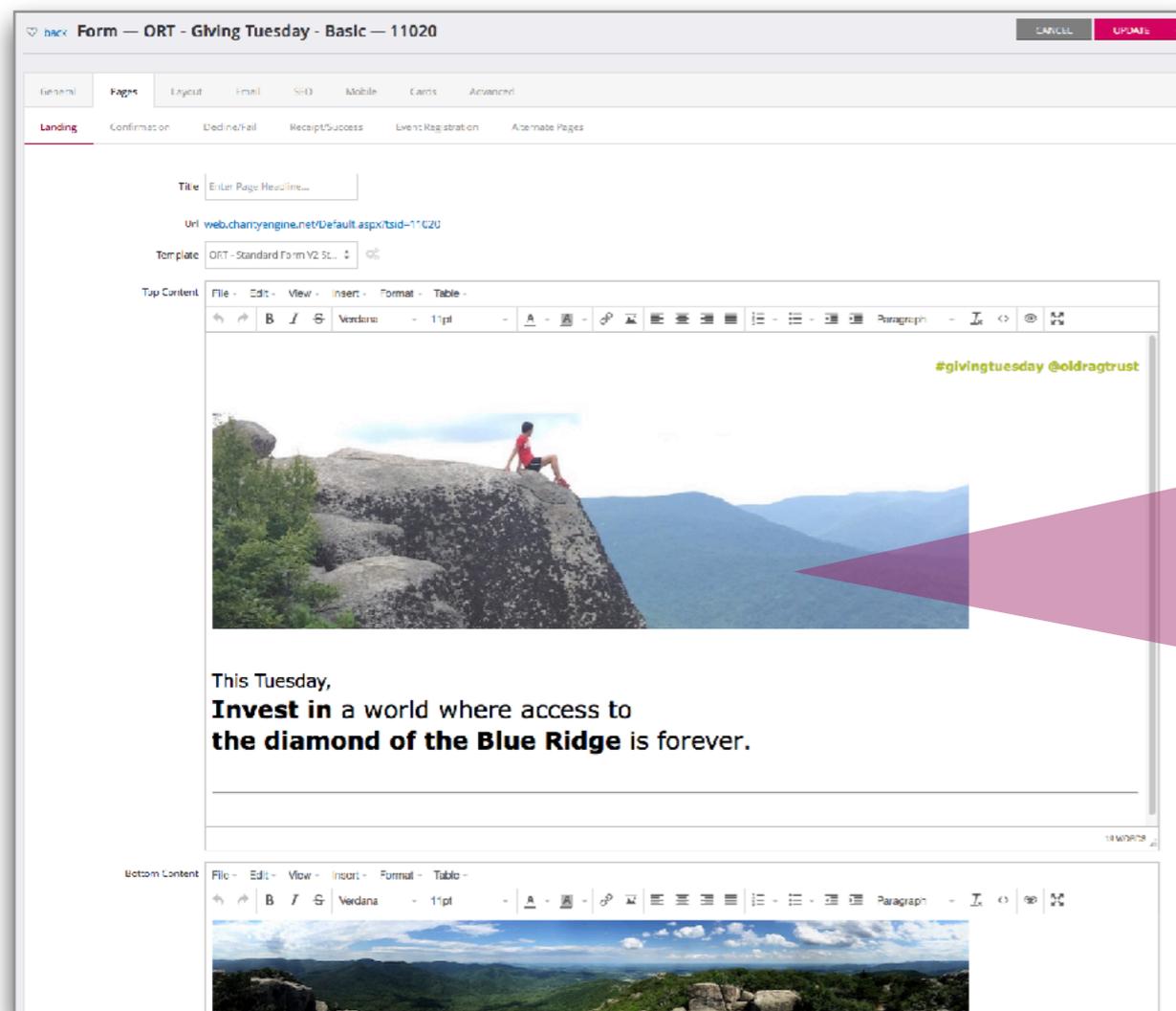
FORMS: Adding Images & Text

To add images or text to the form, go to the Pages Tab.

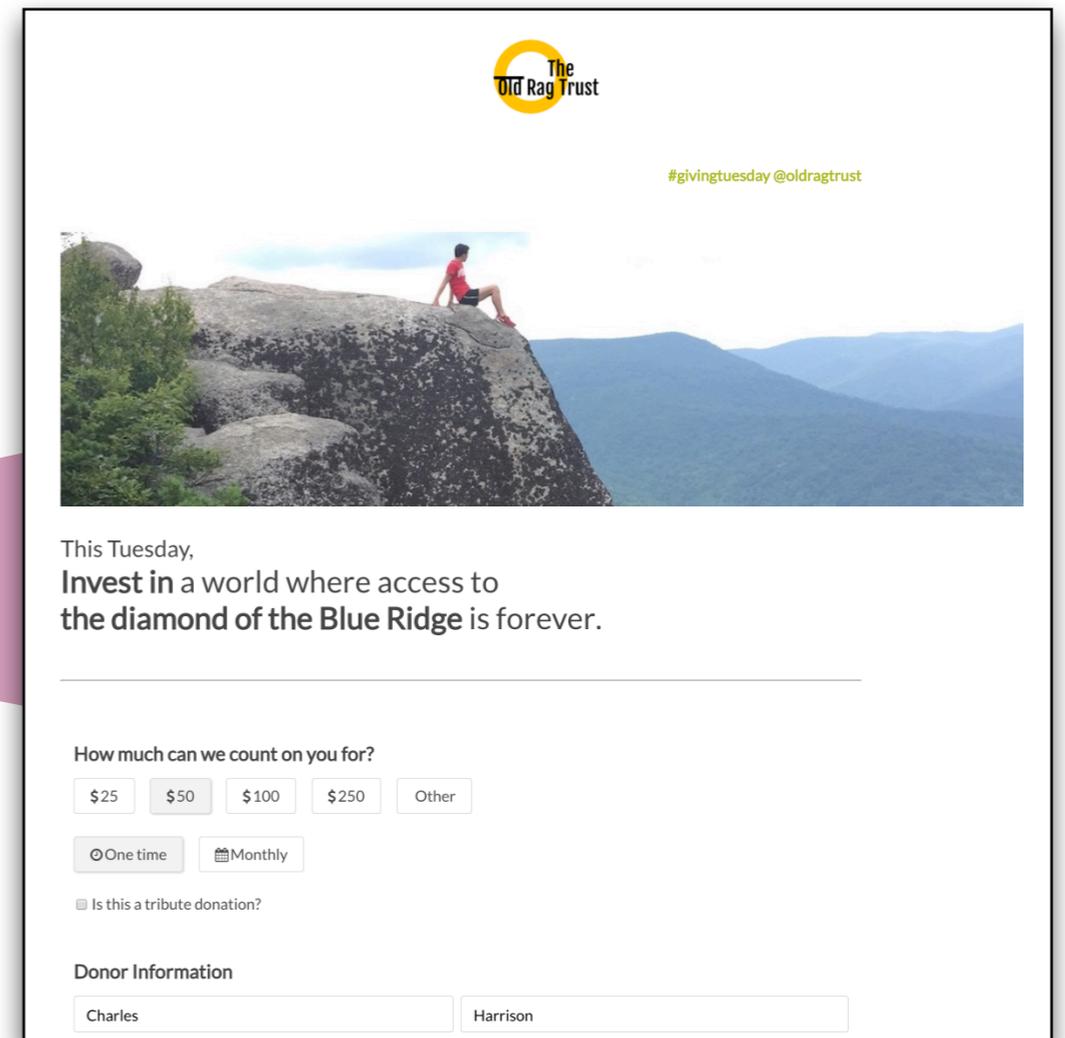
You can add images and text to the Landing, Decline and Receipt Success Pages.

As you can see in the image, **the editing for the Top part of the form was done in the Top Content Section.** You can also add content on the bottom of the form and that will go in Bottom Content.

When done designing, Click **UPDATE.**



The screenshot shows a web form editor interface. At the top, there's a navigation bar with tabs: 'General', 'Pages', 'Layout', 'Email', 'SEO', 'Mobile', 'Events', and 'Advanced'. The 'Pages' tab is active, and a sub-menu shows 'Landing', 'Confirmation', 'Decline/Fail', 'Receipt/Success', 'Event Registration', and 'Alternate Pages'. The 'Landing' page is selected. Below the navigation, there are fields for 'Title' (with a placeholder 'Enter Page Headline...'), 'Url' (web.charityengine.net/Default.aspx?tsid=11020), and 'Template' (ORT - Standard Form V2 St...). The main editing area is divided into 'Top Content' and 'Bottom Content'. The 'Top Content' section has a rich text editor toolbar and contains a large image of a person sitting on a rock overlooking a mountain range, with the hashtag #givingtuesday @oldragtrust overlaid. Below the image is the text: 'This Tuesday, Invest in a world where access to the diamond of the Blue Ridge is forever.' The 'Bottom Content' section also has a rich text editor toolbar and contains a smaller image of a mountain landscape.



The screenshot shows the final form layout. At the top right is the 'The Old Rag Trust' logo. Below it is the hashtag #givingtuesday @oldragtrust. The main image is the same as in the editor, showing a person on a rock overlooking a mountain range. Below the image is the text: 'This Tuesday, Invest in a world where access to the diamond of the Blue Ridge is forever.' Below this is a section titled 'How much can we count on you for?' with radio buttons for '\$25', '\$50', '\$100', '\$250', and 'Other'. There are also radio buttons for 'One time' and 'Monthly'. Below that is a checkbox for 'Is this a tribute donation?'. The 'Donor Information' section has two input fields: 'Charles' and 'Harrison'.

FORMS: Editing Section & Field Labels

Out of the box, the labels on the form match the labels in the sections and on the fields. However, you can edit them yourself.

In this example, we changed the label of the section Donation Information to “How much can we count on you for?”

The Old Rag Trust
#givingtuesday@oldragtrust

This Tuesday,
Invest in a world where access to
the diamond of the Blue Ridge is forever.

How much can we count on you for?
\$25 \$50 \$100 \$250 Other

One time Monthly

Is this a tribute donation?

Donor Information
Charles Harrison

How much can we count on you for?

\$25 \$50 \$100 \$250 Other

One time Monthly

To make changes to Section or Field Labels:

back Form — ORT - Giving Tuesday - Basic — 11020

General Pages Layout Email SEO Mobile Cards Advanced

CREATE NEW SECTION CREATE NEW FIELD

Donation Information

Donation Amount

Frequency

Tribute Information

Donor Information

Payment Information

1. Go to **Layout Tab** on the form.

CREATE NEW SECTION CREATE NEW FIELD

Donation Information

Donation Amount

Frequency

Add Field
Manage
Delete

2. **Go to the Section or Field** that you want to Edit or Remove.

Click the Manage button.

back Form Section — Donation Information — 17135

General Forms

* Name Donation Information

* Label How much can we count on you

* Display Order 1

Display Header

Display Landing Page

Display Confirmation Page

2. **Change the Label and Click Update.**

In our sample, we changed the default label, Donation Information to “How much can we count you for?”

Note, we did not change the name of the section.

FORMS: Editing Donation Amounts

You can change donation amounts or other items that have multiple selections/data inputs.

How much can we count on you for?

\$25 \$50 \$100 \$250 Other

One time Monthly

To find Donation Amount Options, from the Form Screen:

1. Go to Layout
2. Select field Donation Amount
3. Click Display > Data Options

Basic Mapping Display Developer

General Data Options

back Form Field — Donation Amount — 243399

Basic Mapping Display Developer

General Data Options

Default Field Value

CRM Custom Field Mapping

CRM Field Mapping Type: None Create Only Create & Update Update Only

Default System Field Option

Select Data Template: States USE TEMPLATE

Dynamic Increment Type: none (optional)

Label	Value	Default	
25	25	0	Manage Remove
50	50	1	Manage Remove
100	100	0	Manage Remove
250	250	0	Manage Remove

To make changes to Donation Amounts

1. Select the Value to Change

On Data Options, Click Manage next to the value you want to edit.

Manage | Remove

Label	Value	Default	
25	25	0	Manage Remove
50	50	1	Manage Remove
100	100	0	Manage Remove
250	250	0	Manage Remove

2. Change the Amounts

If you want to change the amount on the button, i.e. instead of \$25, you want the first amount to be \$18, **change both the Option Value and Option Value fields to \$18 and click Update.**

Field: Donation Amount

Option Label: 18

Option Value: 18

back Manage Form Field Option

CANCEL UPDATE

General

Field: Donation Amount

Option Label: 25

Option Value: 25

Default Option:

Dynamic Increment Value: 0.00 (optional - supplements base increment)

OnClick

If you want it to be the default selection, click Default Option.

(Note: You can only have 1 default. The standard forms are defaulted to \$50, the second amount option)

You're done! Enjoy your Coffee. :)



#givingtuesday@oldragtrust



This Tuesday,
Invest in a world where access to
the diamond of the Blue Ridge is forever.

How much can we count on you for?

One time Monthly

Is this a tribute donation?

Donor Information

Charles

Harrison

Thank you George >

Eleanor Franklin, Old Rag Trust
to gwashington



Dear George,

On behalf of everyone at the Old Rag Trust,
thank you for your contribution of \$25.00
that we received today.

Because of your generosity, kids like Jonah,
who I met this summer on a hike up Old Rag,
will begin a lifelong love with this jewel of the Blue Ridge!

Thank you and have a wonderful holiday season.

Sincerely,

Eleanor Franklin
CEO
Old Rag Trust

[Return To Table of Contents](#)

Don't Forget to Check Out...

Send Acknowledgements

A CharityEngine Training Document

[Return To Table of Contents](#)

[Click Here to Go To Acknowledgements](#)

Saying **Thank You** is easy. It's also the best part.