

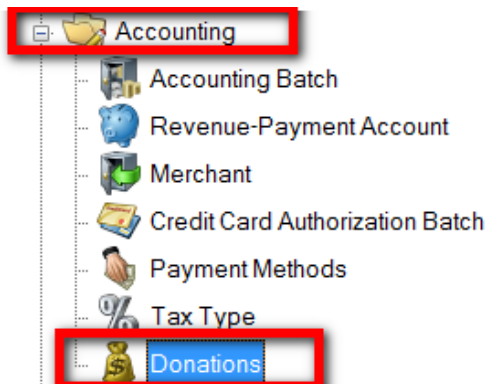
Creating A Donation

1. [Log in](#) to **Administration**.

2. Click on the **Corporate Organization** icon



3. Open the **Accounting** folder and click on the **Donations** icon.



4. Right click and select **New**.

Name	Sales Line Type	Account	Sequence Number	Sort Name	Enabled
Needful Donations	Giving	Donation	0	NeedDon	True

Donation

New
Properties

5. In the **General** tab:

Donation: Needful Donations

Skining Organization 1841

General Sales Channels Images Web Control Web Descriptives Description Extra HTML Confirmation Questions Notes

Name: Needful Donations

Sort Name: NeedDon

Sales Line Type: Giving

Account: Donation

Donation Levels: 1

- \$10.00
- \$20.00
- \$50.00
- \$100.00

Display Sequence: 0

Project Code:

Enabled:

OK Cancel Apply

A) **Name:** name of the donation, this will be visible online to customers.

B) **Sort Name:** name of the donation, donations will be sorted online with these names.

C) **Sales Line Type:** select the one that fits the donation the best or create a new one by clicking on the ellipses.

D) **Account:** select the correct Revenue-Payment Account or create a new one by clicking on the ellipses.

E) **Donation Levels:** enter in the different levels of the donation available. Click "Add" or "Remove" to edit these.

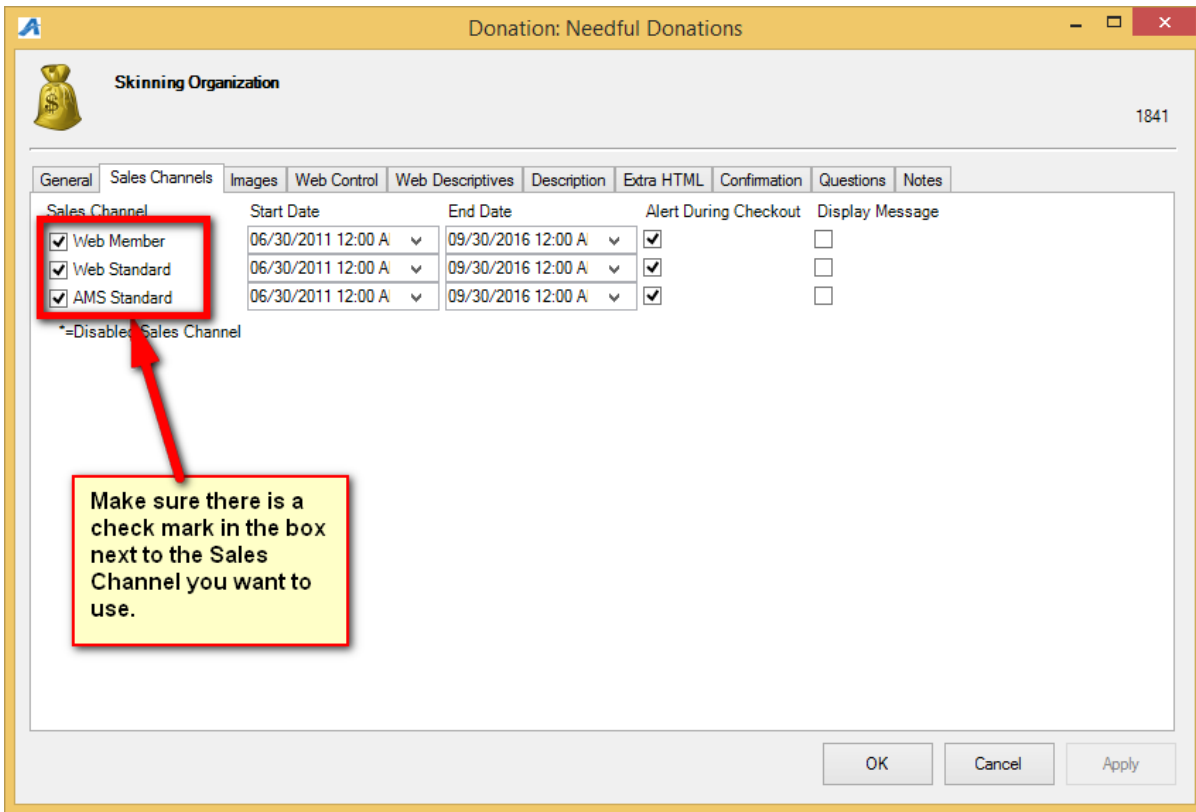
F) **Display Sequence:** places the donations in a specific order.

G) **Project Code:** select the correct item from the list or create a new one by clicking on the ellipses.

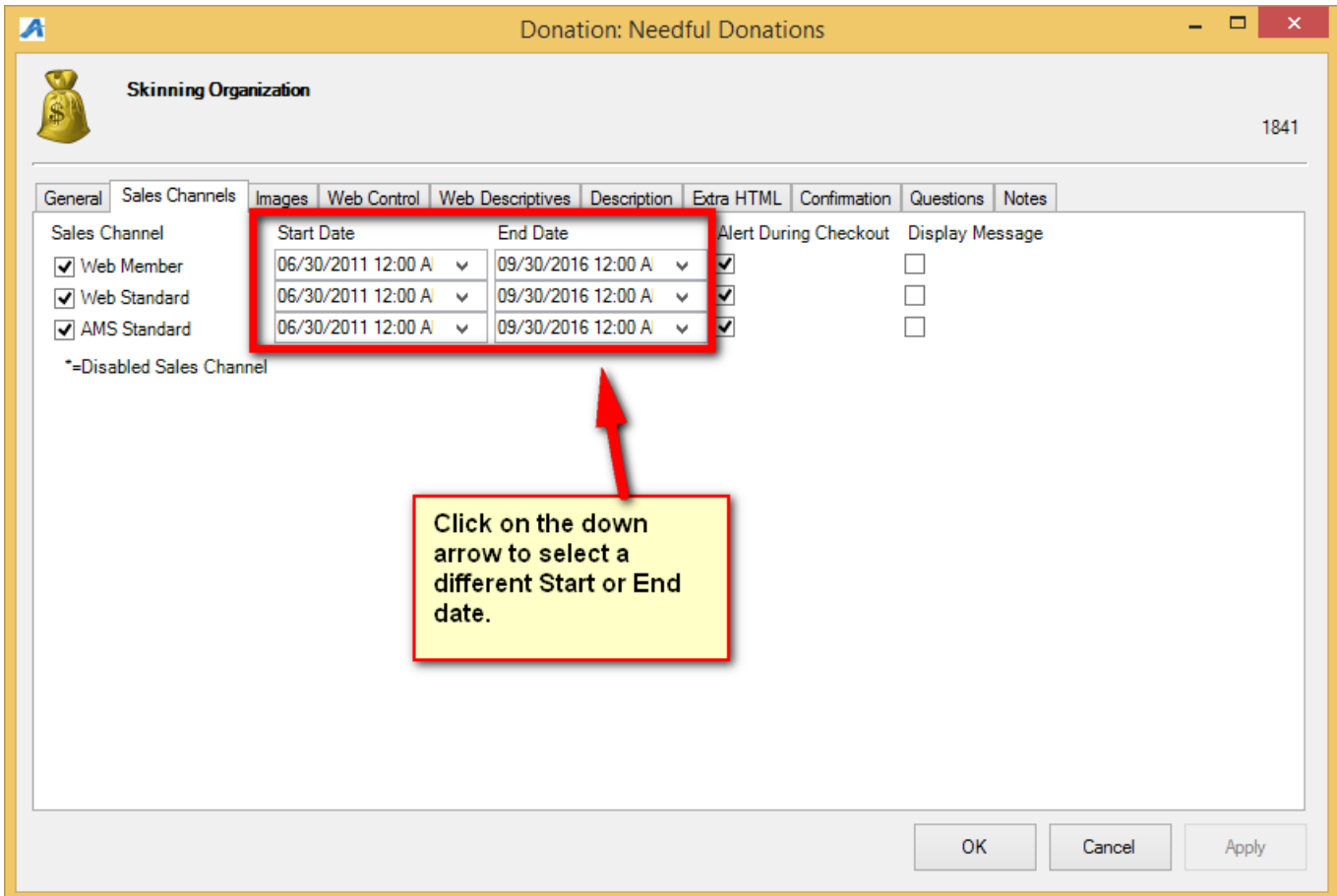
H) **Enabled:** make sure this is checked to make available.

Note: *Allow 12 month pledge* is an option only available to **Donor Perfect** clients and will allow donations to be divided between 12 months. The minimum pledge amount can also be specified.

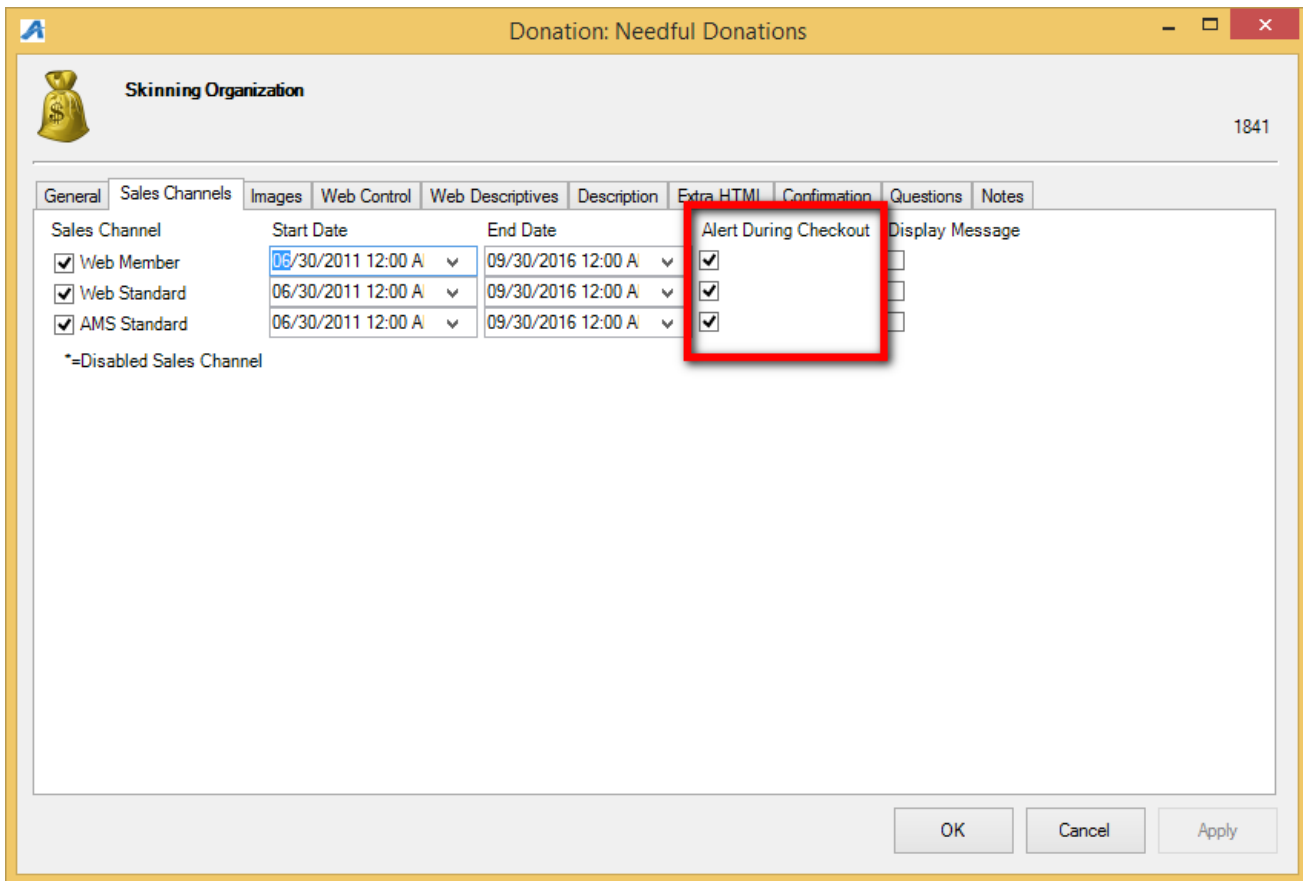
6. In the **Sales Channels** tab select the appropriate sales channels.



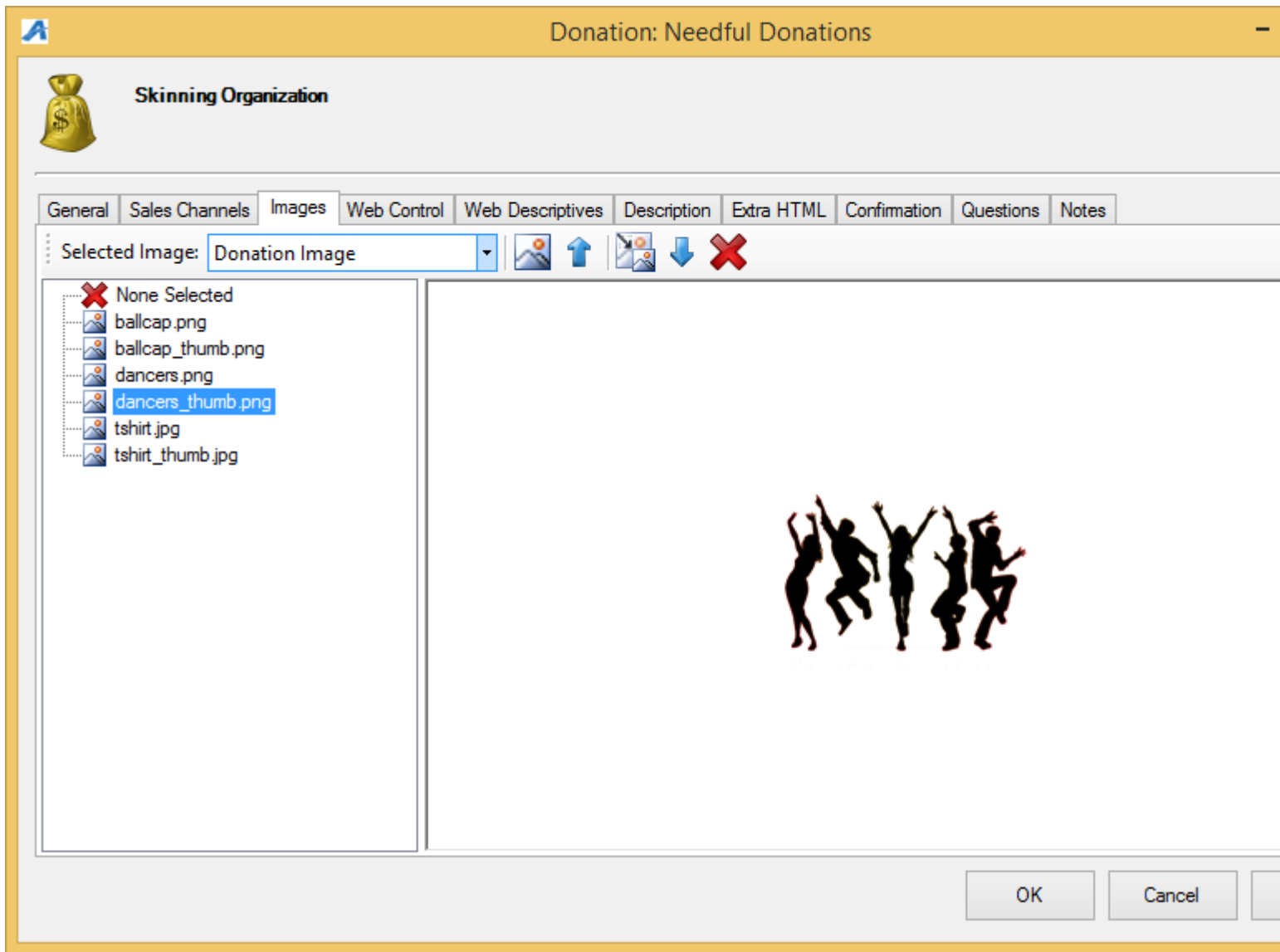
7. The **Start** and **End date** can be specified for a later on-sale date.



8. If **Alert During Checkout** is selected, this will allow a prompt during AMS and online sales.

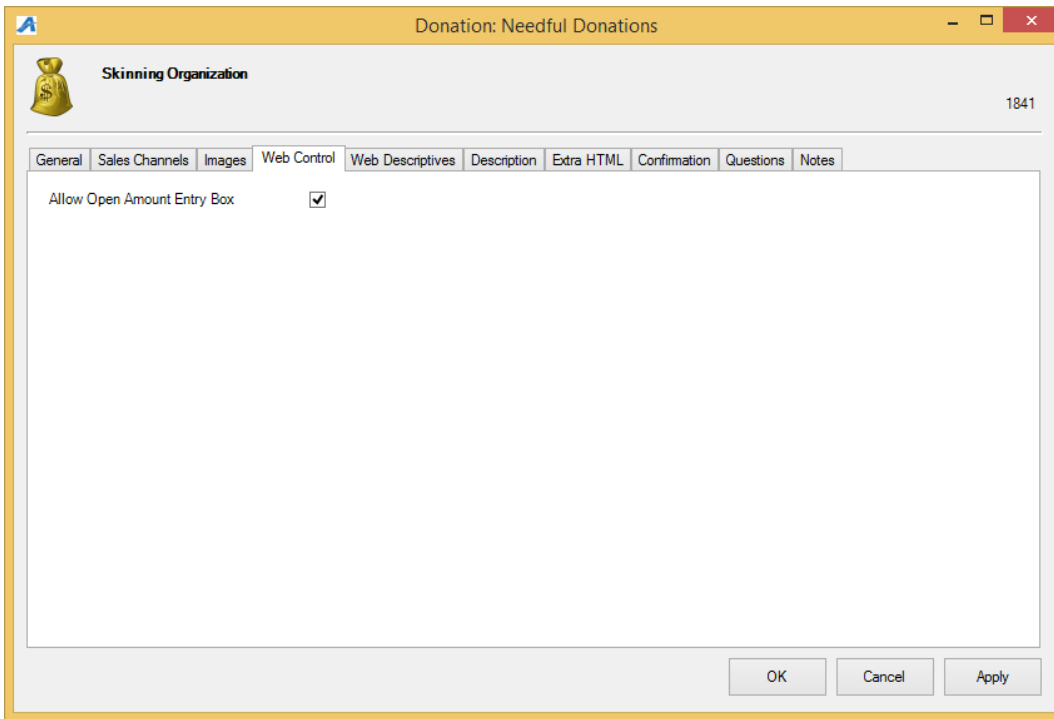


9. In the **Images** tab you are able to add an image for online viewing.



10. **Web Control** tab: "Allow Open Amount Entry Box" allows customers to enter in any amount.

Note: All donations must be \$2 or greater.

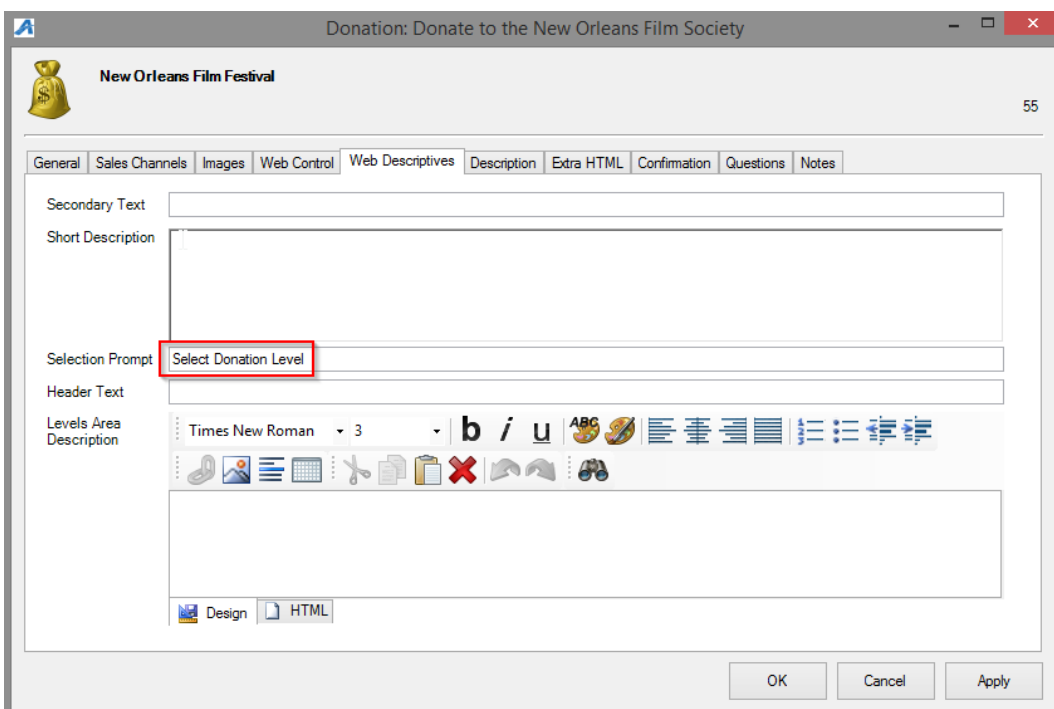


11. **Web Descriptives** tab:

-Secondary Text:

-Short Description: Recommended to enter a short descriptive that will be seen under Donation Fund Name (*more info will appear when longer descriptions are necessary*).

-Selection Prompt: text appears on your web page above the dollar values.



Select Donation Level

- \$25.00
- \$50.00
- \$100.00
- \$150.00
- \$200.00
- \$500.00
- \$1,000.00
- 0.00 (Enter an amount)

Make Donation

-Levels Area Description: allows you to enter important information as in image below.

Select Donation Level

- \$25.00
- \$50.00
- \$100.00
- \$150.00
- \$200.00
- \$500.00
- \$1,000.00
- 0.00 (Enter an amount)

Make Donation

\$500 level and above qualifies for member passes.

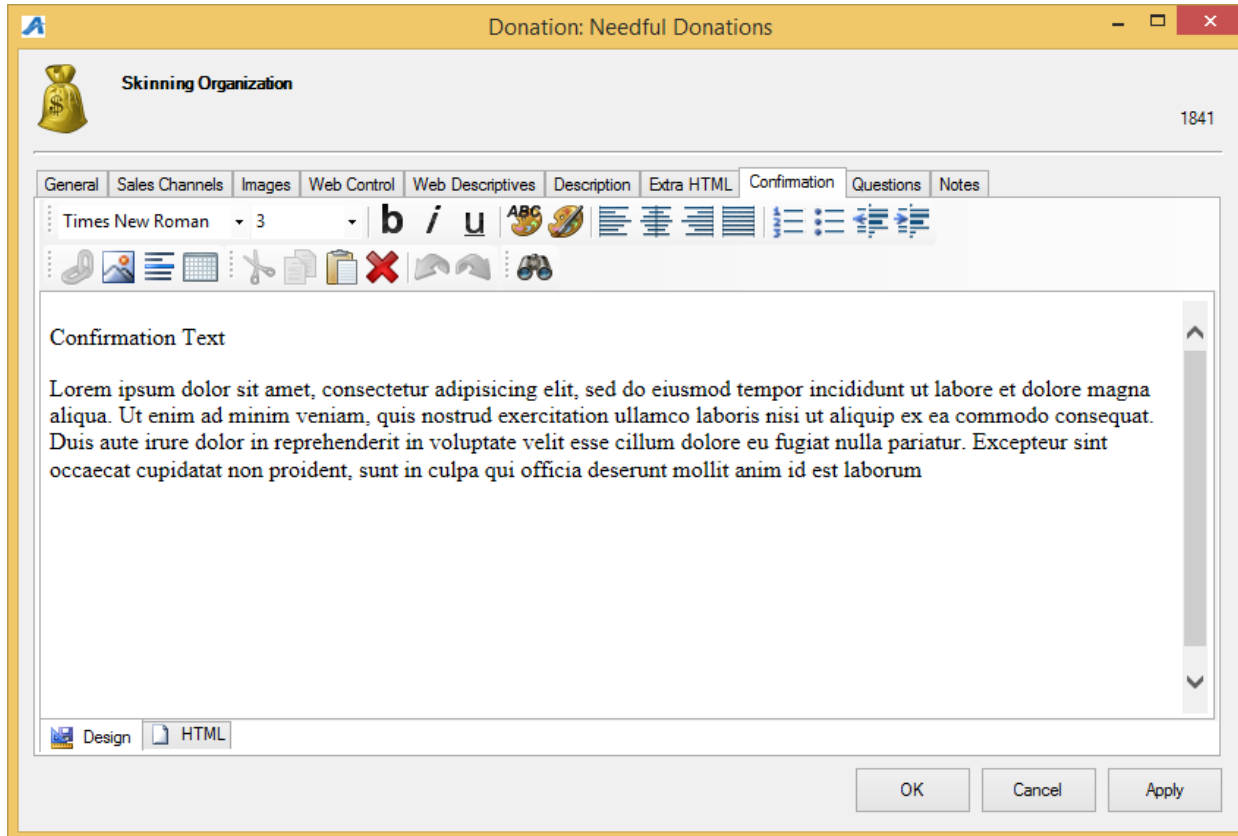
\$1,000 level qualifies for free popcorn.

12. **Description** tab: enter in more information regarding the donation.

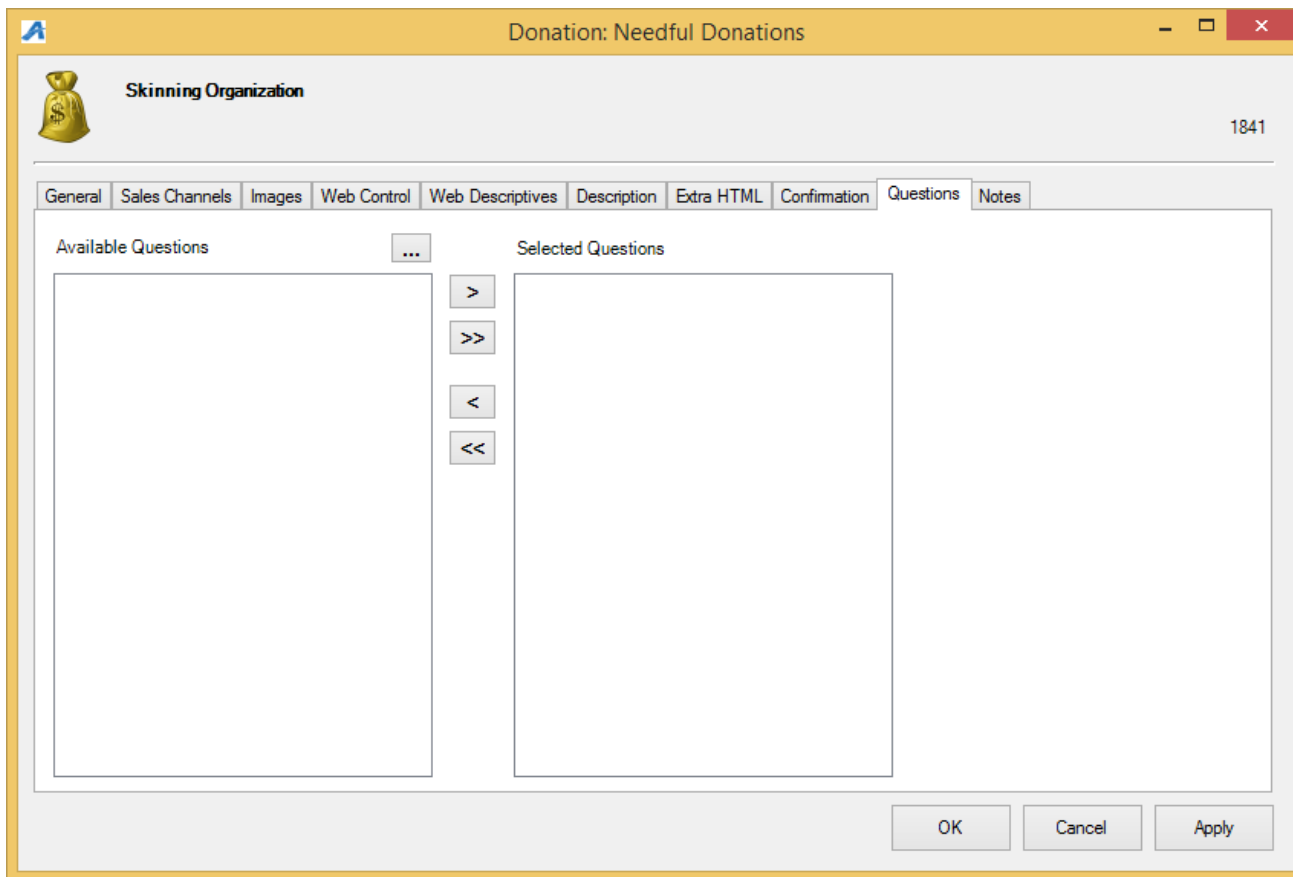
The screenshot shows a software window titled "Donation: Needful Donations" with a yellow border. The window contains a "Skinning Organization" header with a money bag icon and the number "1841". Below the header is a tabbed interface with tabs for "General", "Sales Channels", "Images", "Web Control", "Web Descriptives", "Description", "Extra HTML", "Confirmation", "Questions", and "Notes". The "Description" tab is active, showing a rich text editor with a toolbar containing icons for font selection (Times New Roman, size 3), bold, italic, underline, link, unlink, list, and other text formatting options. The main text area contains two paragraphs of placeholder text: "Long Description" followed by two paragraphs of Lorem ipsum text. At the bottom of the window, there are "Design" and "HTML" view toggles, and "OK", "Cancel", and "Apply" buttons.

13. **Extra HTML** tab: can include more information about the donation.

14. **Confirmation** tab: include information specific to the donation that you want added in the confirmation email.

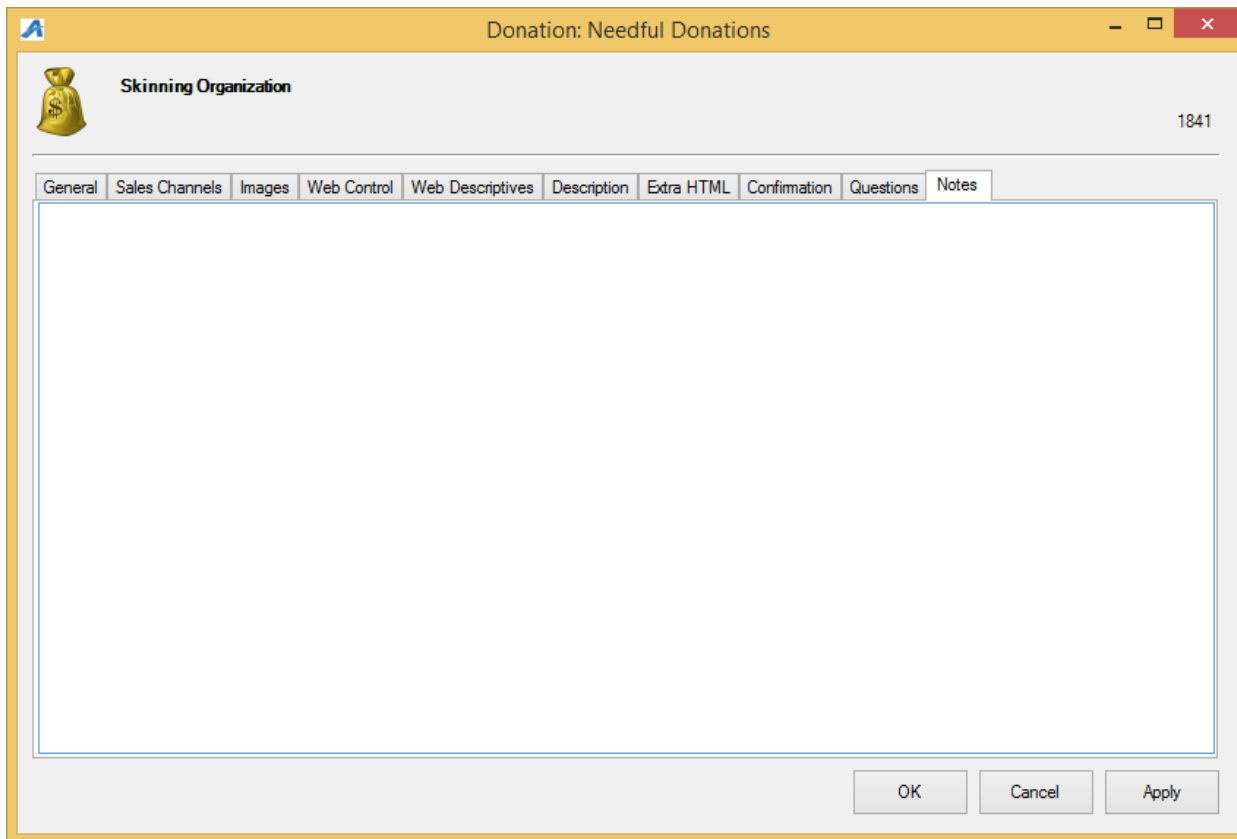


15. **Questions** tab: add questions in here to be asked of the customer. Move the questions from the "Available Questions" column to the "Selected Questions" column. For more information see [Creating Order Questions](#).



*Note: The **Donor Management** tab is for Donor Perfect clients only. Select the correct options from the drop-downs. These items draw from your Donor Perfect items. You can add new campaigns by clicking on the green plus sign.*

16. **Notes** tab: this area is for internal use only and will not be seen by the customer.



17. Once you have filled out all of the information in each tab click **Apply** then **OK**.