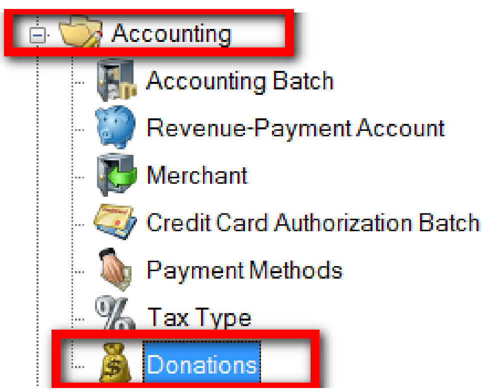
# Creating A Donation

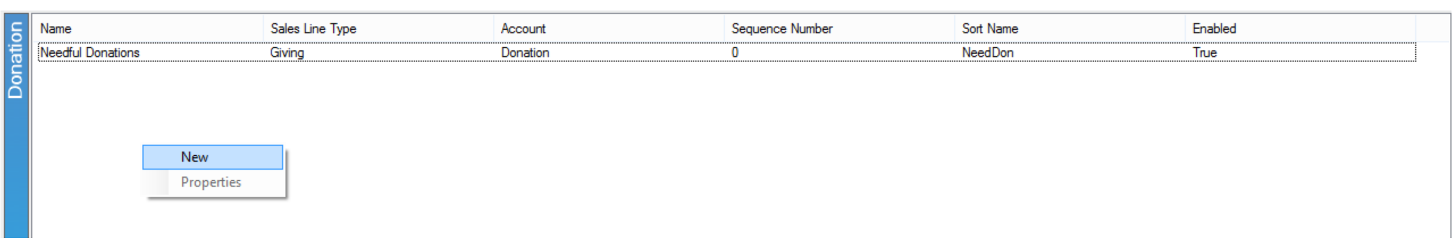
1. Log in to **Administration**.

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

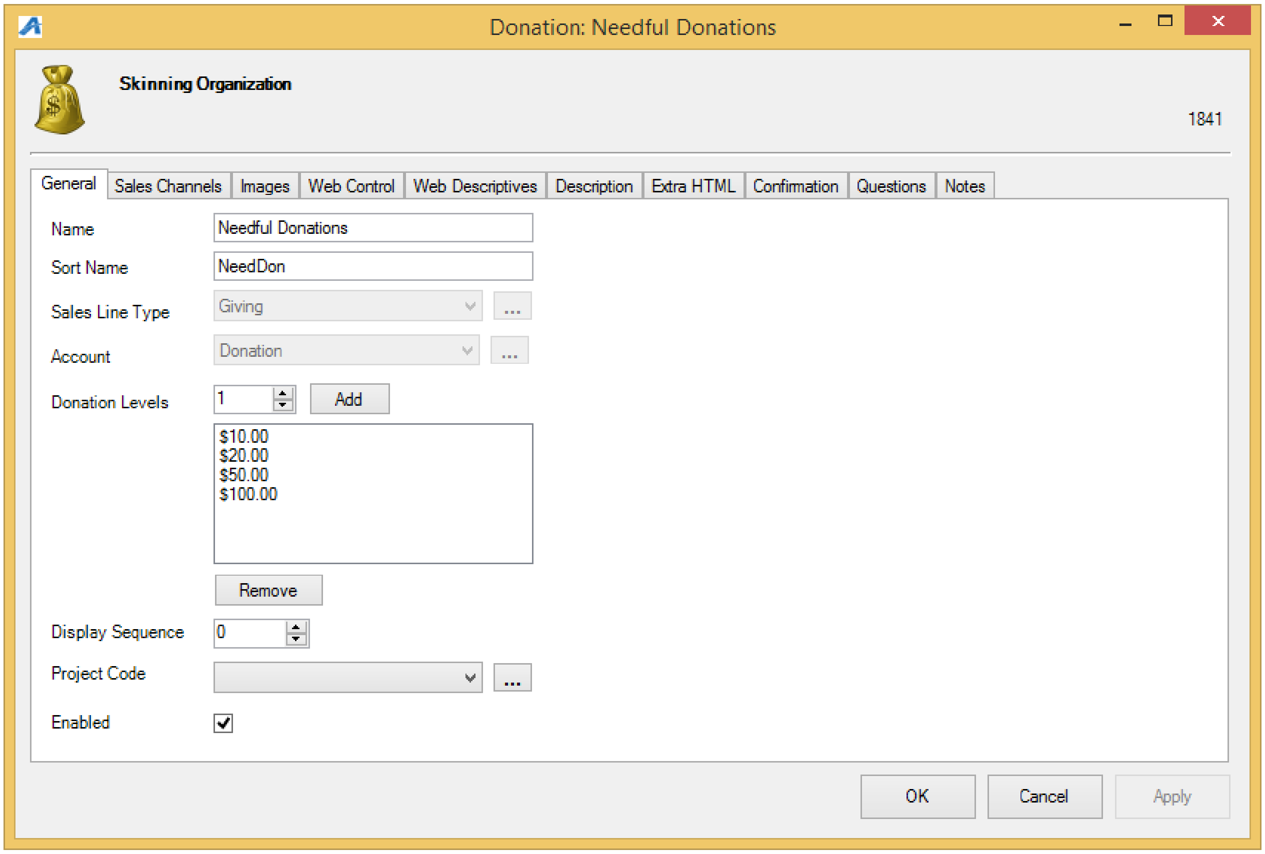
3. Open the **Accounting** folder and click on the **Donations** icon.




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




5. In the **General** tab:




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.

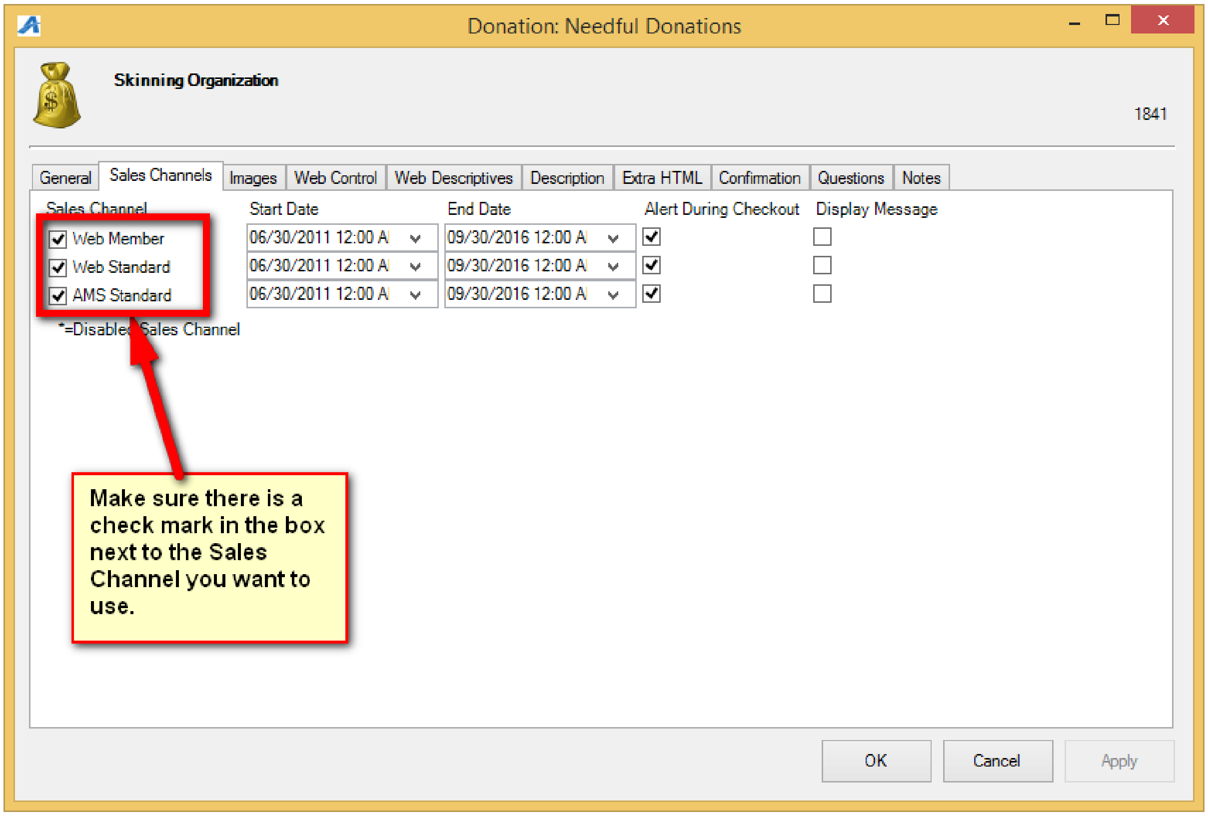
F) **Display Sequence**: places the donations in a specific order.

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

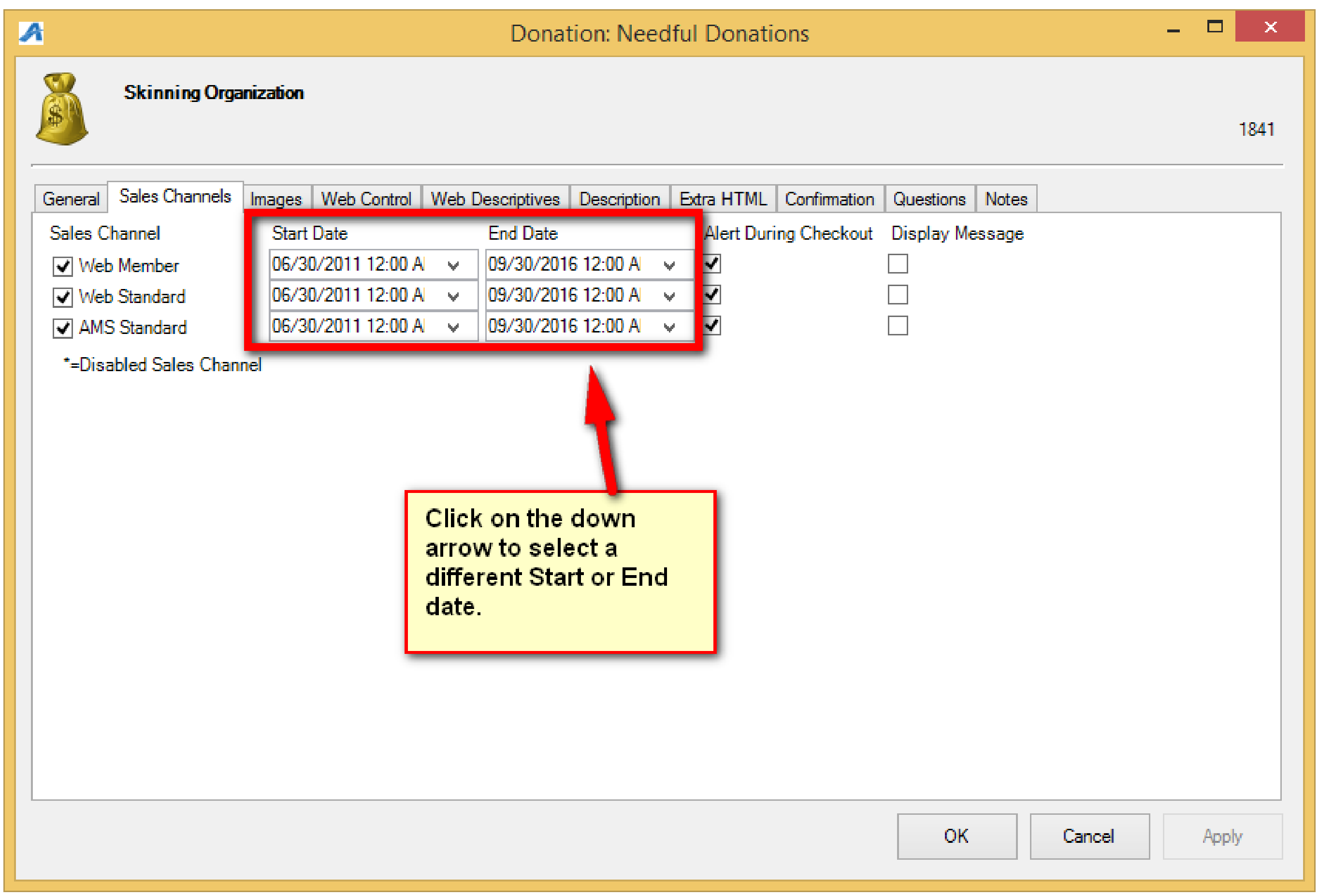
H) **Enabled**: make sure this is checked to make available.

***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.*

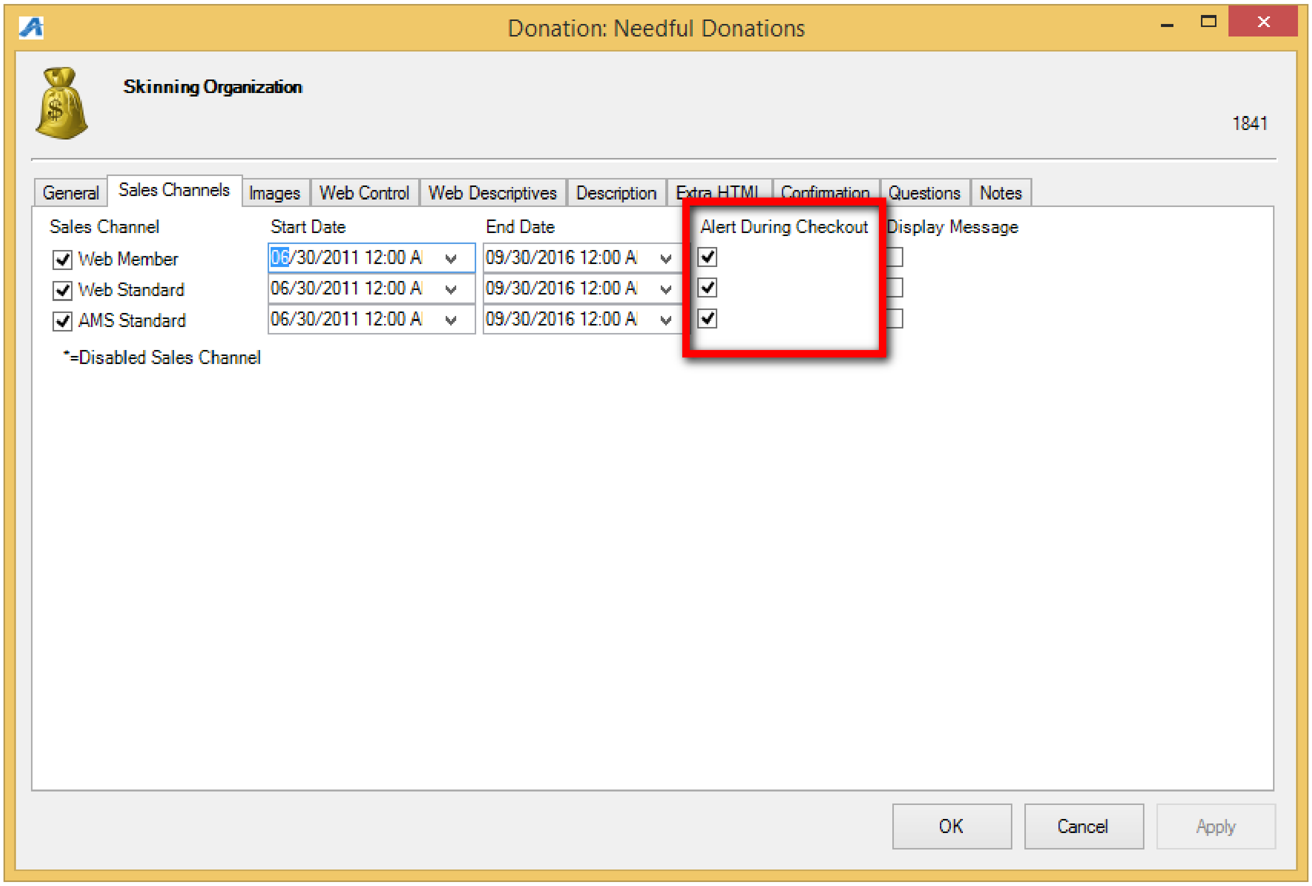
6. In the **Sales Channels** tab select the appropriate sales channels.



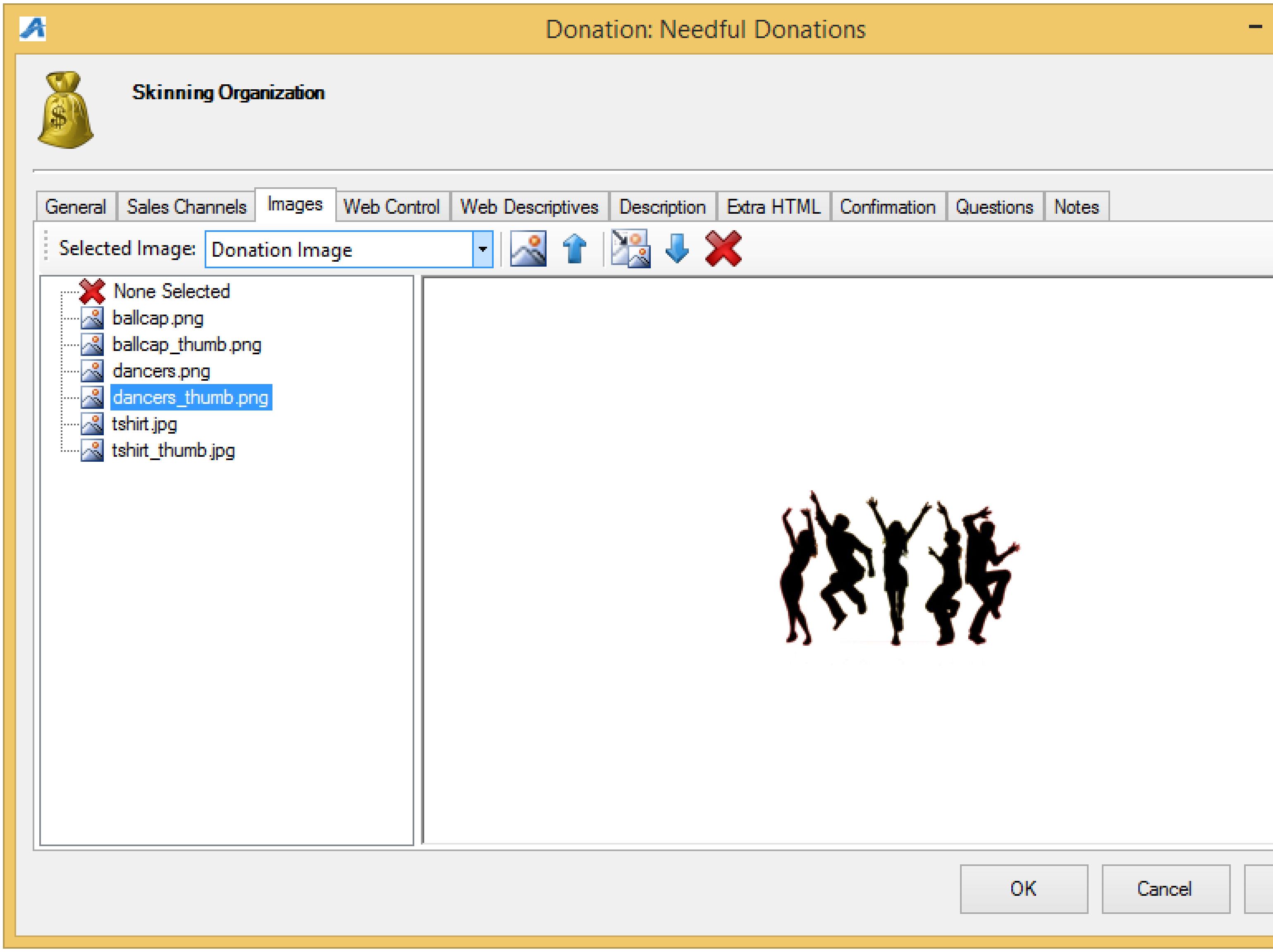

7. The **Start** and **End date** can be specified for a later on-sale date.




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

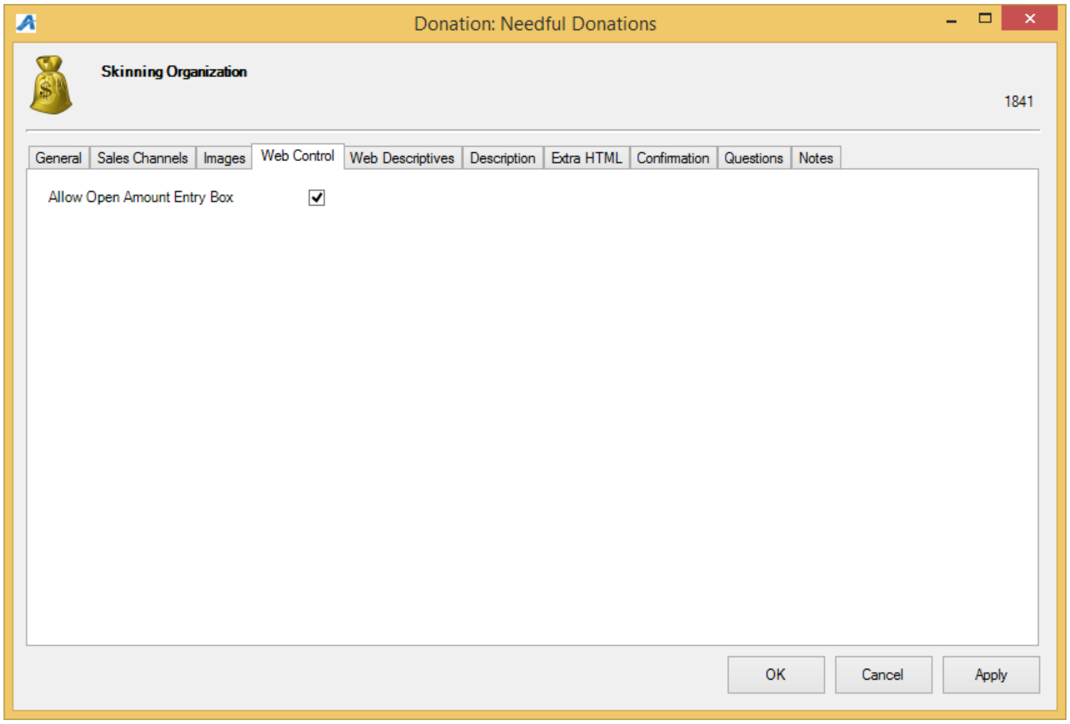



9. In the **Images** tab you are able to add an image for online viewing.




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

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

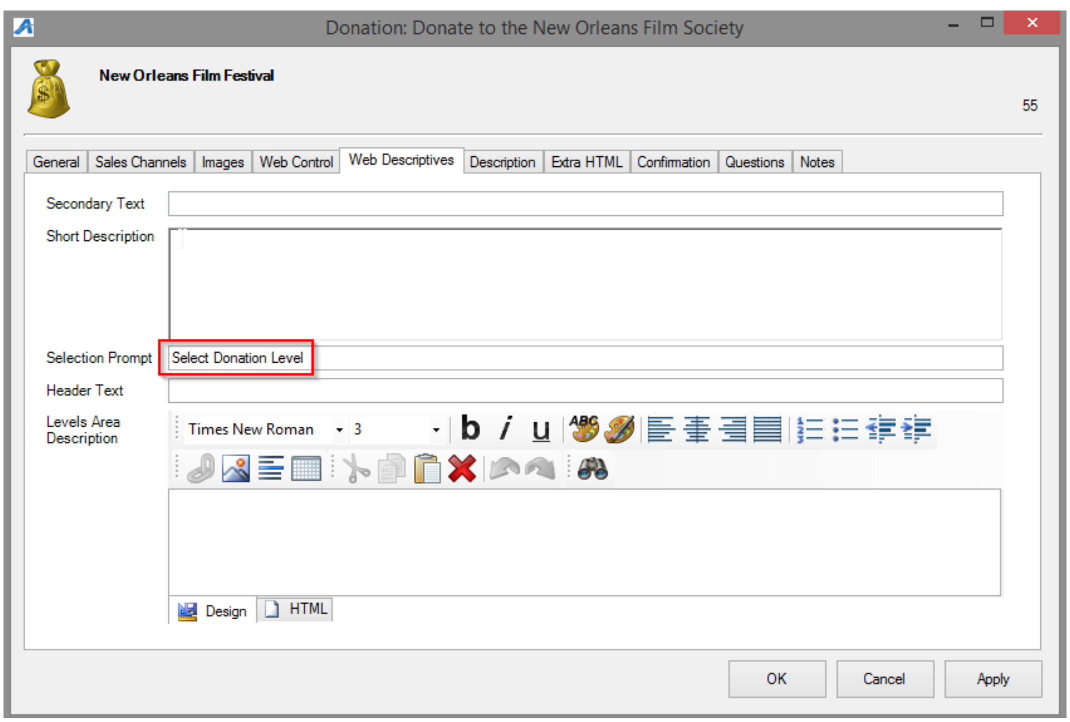


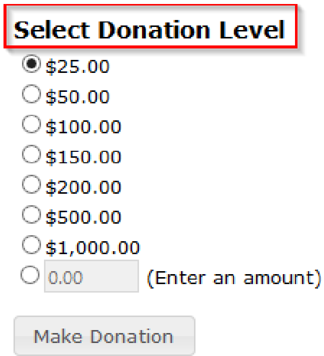

11. **Web Descriptives** tab:

-Secondary Text:

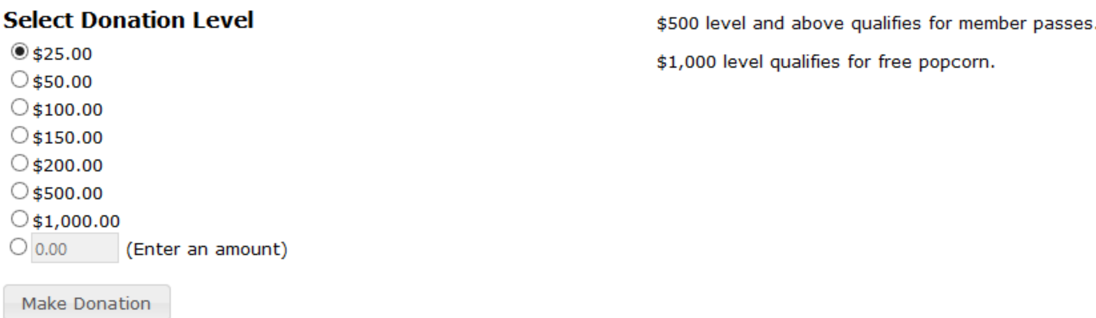
-Short Description: Recommended to enter a short descriptive that will be seen under Donation Fund Name (*more info will appear when longer descriptions are necessary).*

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

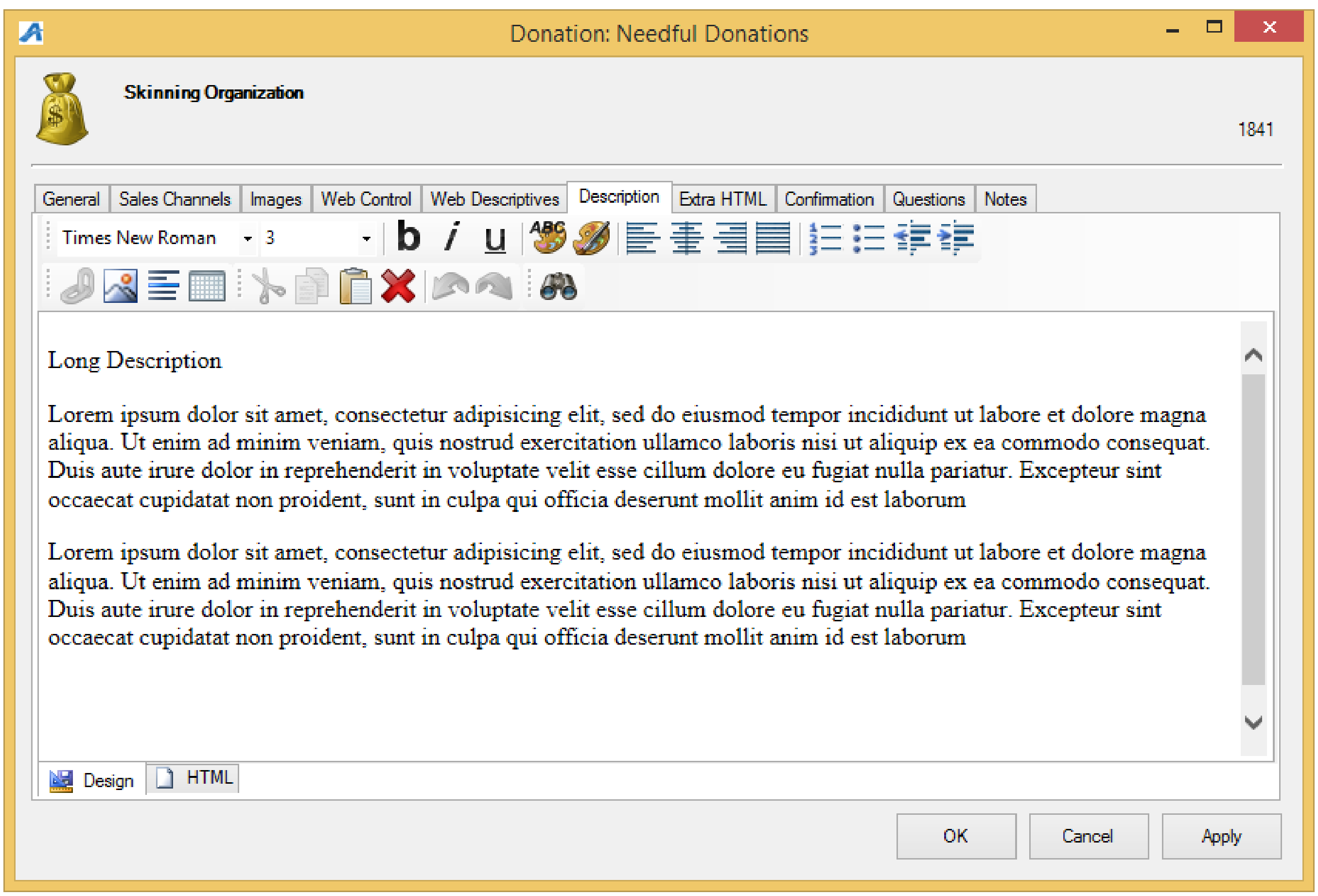





-Levels Area Description: allows you to enter important information as in image below.

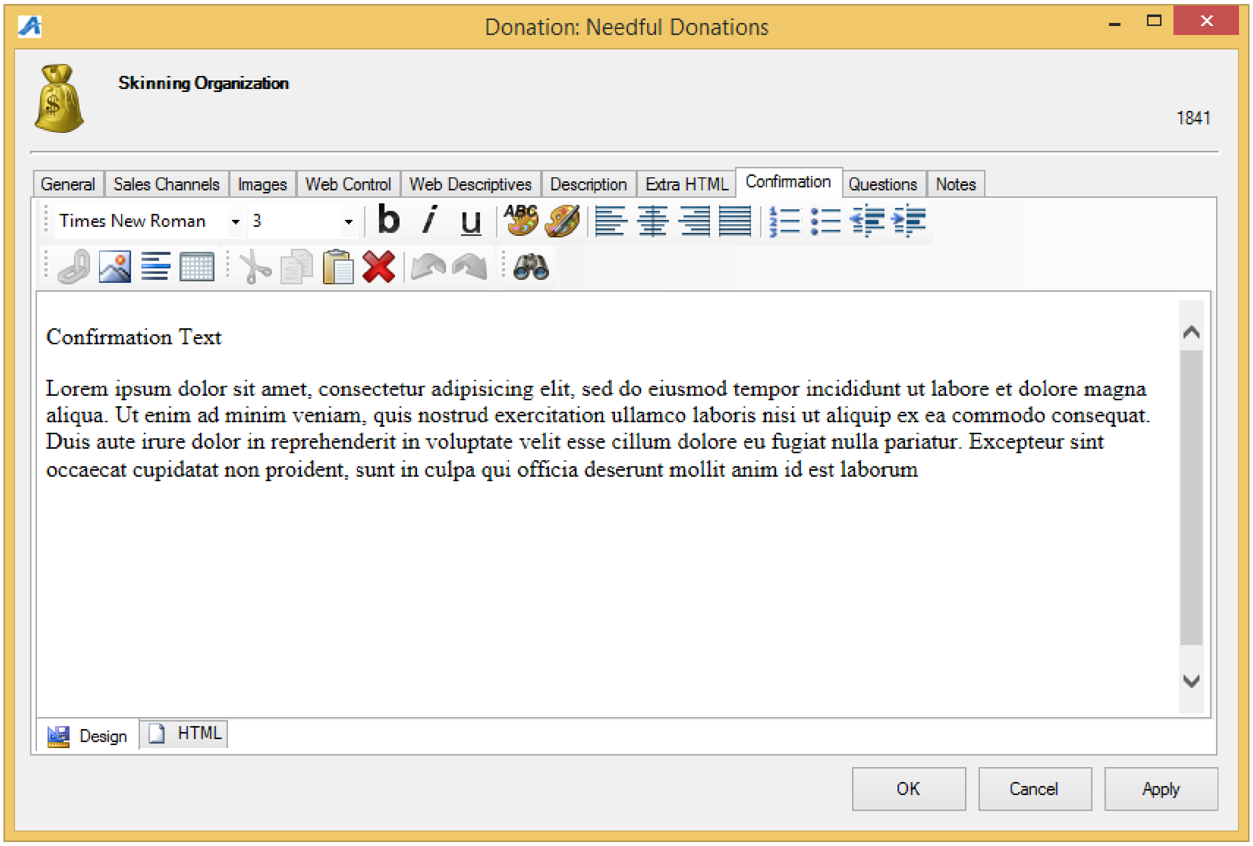



12. **Description** tab: enter in more information regarding the donation.

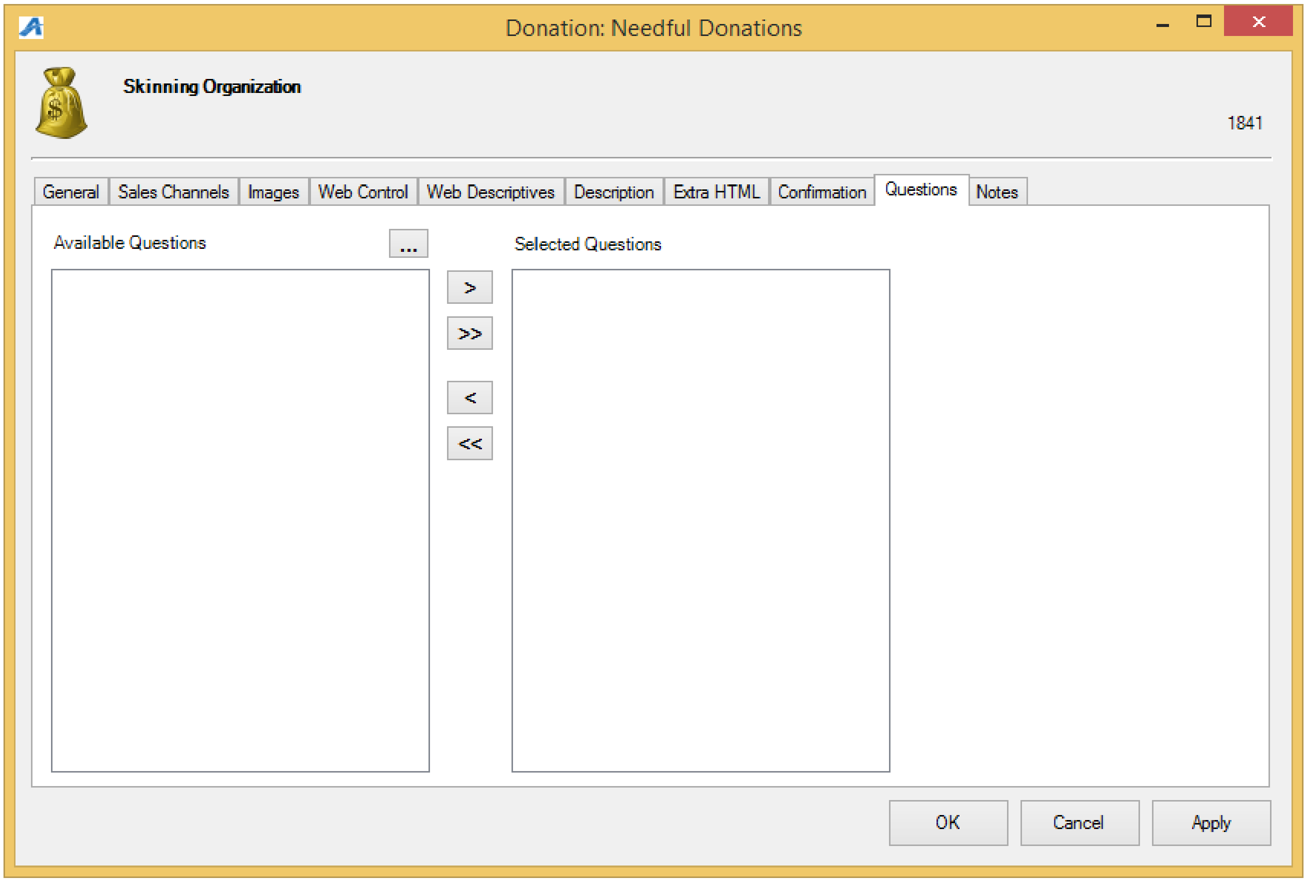


13. **Extra HTML** tab: can include more information about the donation.

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

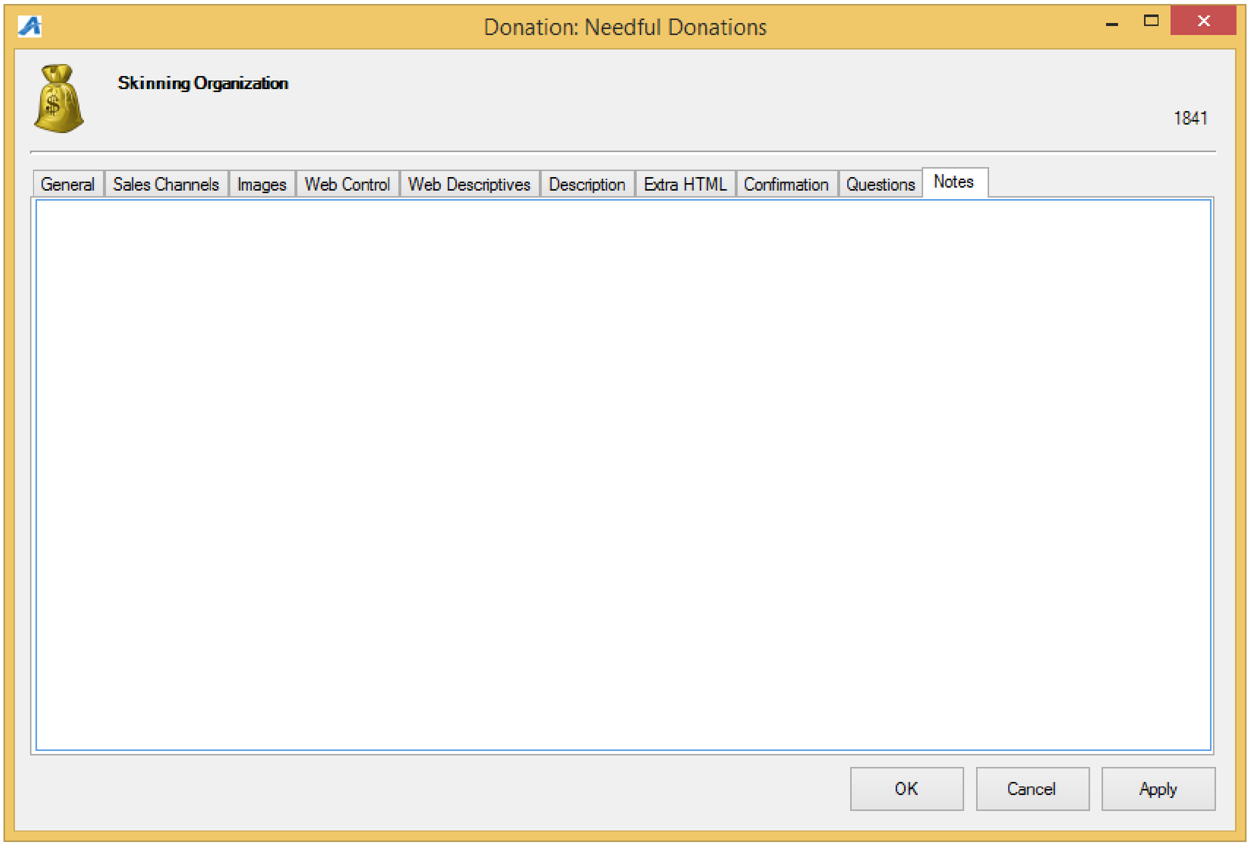



15. **Questions** tab: add questions in here to be asked of the customer. Move the questions from the "Available Questions" column to the "Selected Questions" column. For more information see [Creating Order Questions](#).




*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**.