**Creating a Donation**

1. [Log in](https://support.agiletix.com/hc/en-us/articles/200617005-Log-In) to **Administration**.

2. Click the **House** icon .

3. Open the **Accounting** folder and click 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**: Either select a pre-existing type that best fits the donation from or create a new type by clicking on the ellipses.

       D) **Account**: Either 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**: Either 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 the donation available to customers.

***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 Dates** can be specified for a later on-sale date.



* If **Alert During Checkout** is selected, this will allow a prompt during AMS and online sales.
* If**Alert on Payment** is selected, this will allow a prompt during the final payment process on AMS and Online sales

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



9. **Web Control** tab:

* "Allow Open Amount Entry Box" allows customers to enter in any amount.
* "Allow Order Round Up Box" allows the customer to round up their uneven purchase total amount by making a small donation.



10. **Web Descriptives** tab:

-Secondary Text: Text in this area will be placed between the name of the donation and the Short Description on the donation page. (Some organizations put a short thank-you message here. Others choose to leave Secondary Text blank.)

-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 which appears on your web page above the dollar values.





-Levels Area Description: allows you to present important information alongside Donation Levels as in image below.



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



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

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



14. **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](https://support.agiletix.com/hc/en-us/articles/205274254-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.

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



16. Once you have finished filling out the information in each tab, click **Apply** to save your changes and **OK**to close the window.