

Creating a Donation

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

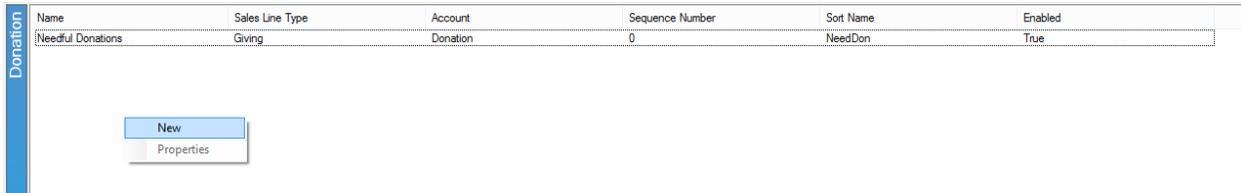


2. Click the **House** icon .

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



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



5. In the **General** tab:

Skinning Organization 1841

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

Name:

Sort Name:

Sales Line Type: ...

Account: ...

Donation Levels: Add

Remove

Display Sequence:

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:** 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.

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Sales Channel	Start Date	End Date	Alert During Checkout	Alert on Payment	Display Message
<input checked="" type="checkbox"/> Web Member	06/30/2011 12:00 A	09/30/2016 12:00 A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Web Standard	06/30/2011 12:00 A	09/30/2016 12:00 A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> AMS Standard	06/30/2011 12:00 A	09/30/2016 12:00 A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*=Disable Sales Channel

Make sure there is a check mark in the box next to the Sales Channel you want to use.

OK Cancel Apply

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

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Sales Channel	Start Date	End Date	Alert During Checkout	Alert on Payment	Display Message
<input checked="" type="checkbox"/> Web Member	06/30/2011 12:00 A	09/30/2016 12:00 A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Web Standard	06/30/2011 12:00 A	09/30/2016 12:00 A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> AMS Standard	06/30/2011 12:00 A	09/30/2016 12:00 A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*=Disabled Sales Channel

Click the down arrows to select different Start or End Dates.

OK Cancel Apply

- 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.

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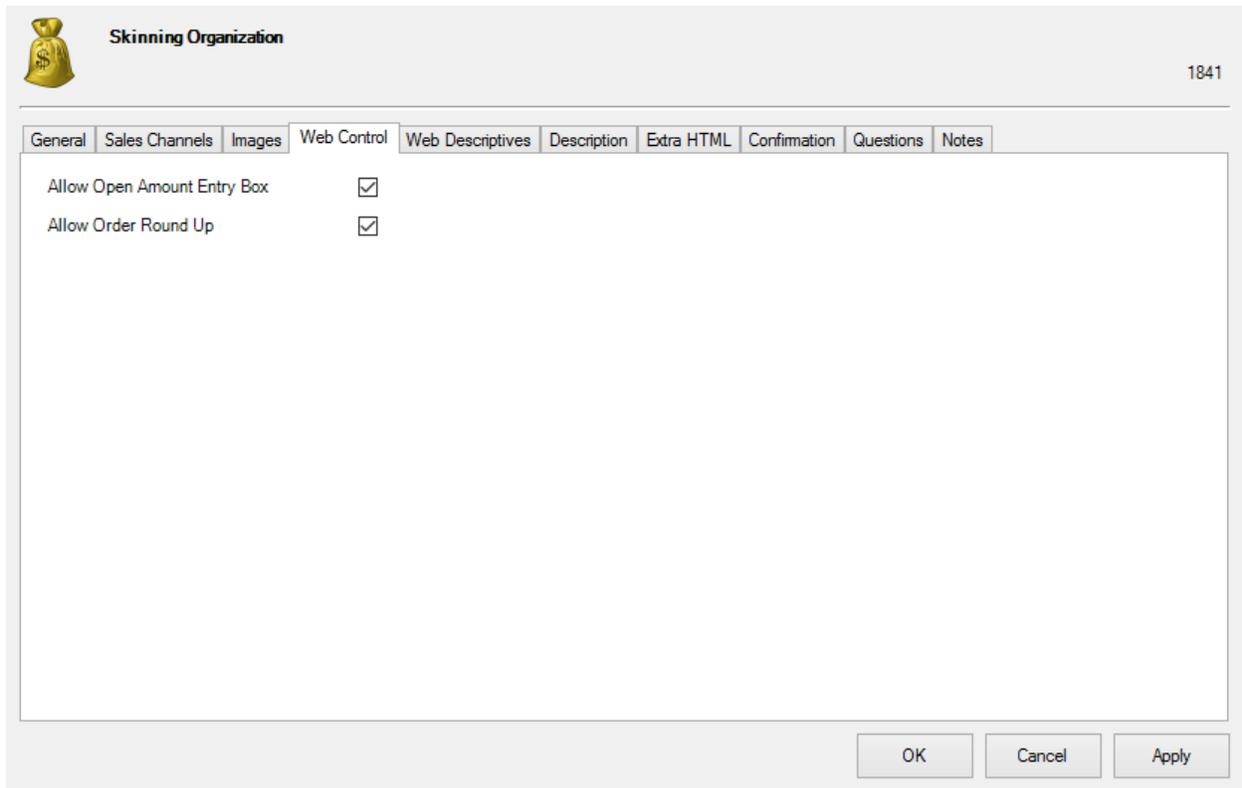
Selected Image: Donation Image

- None Selected
- ballcap.png
- ballcap_thumb.png
- dancers.png
- dancers_thumb.png
- tshirt.jpg
- tshirt_thumb.jpg

OK Cancel Apply

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.



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

Allow Open Amount Entry Box

Allow Order Round Up

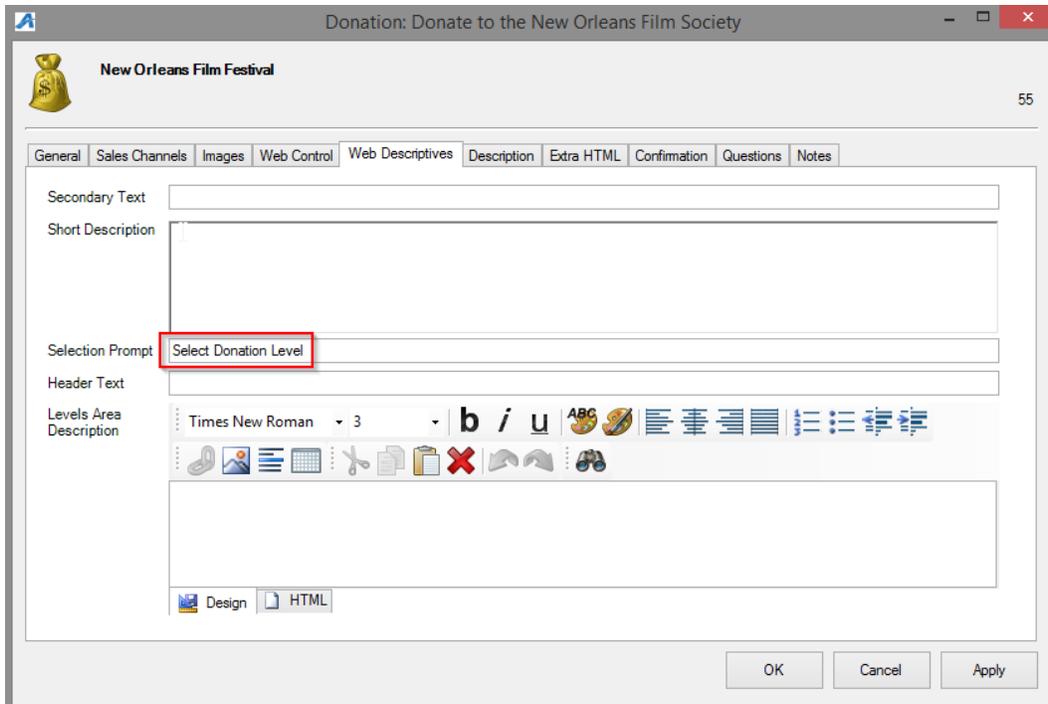
OK Cancel Apply

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.



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 present important information alongside Donation Levels as in image below.

Select Donation Level

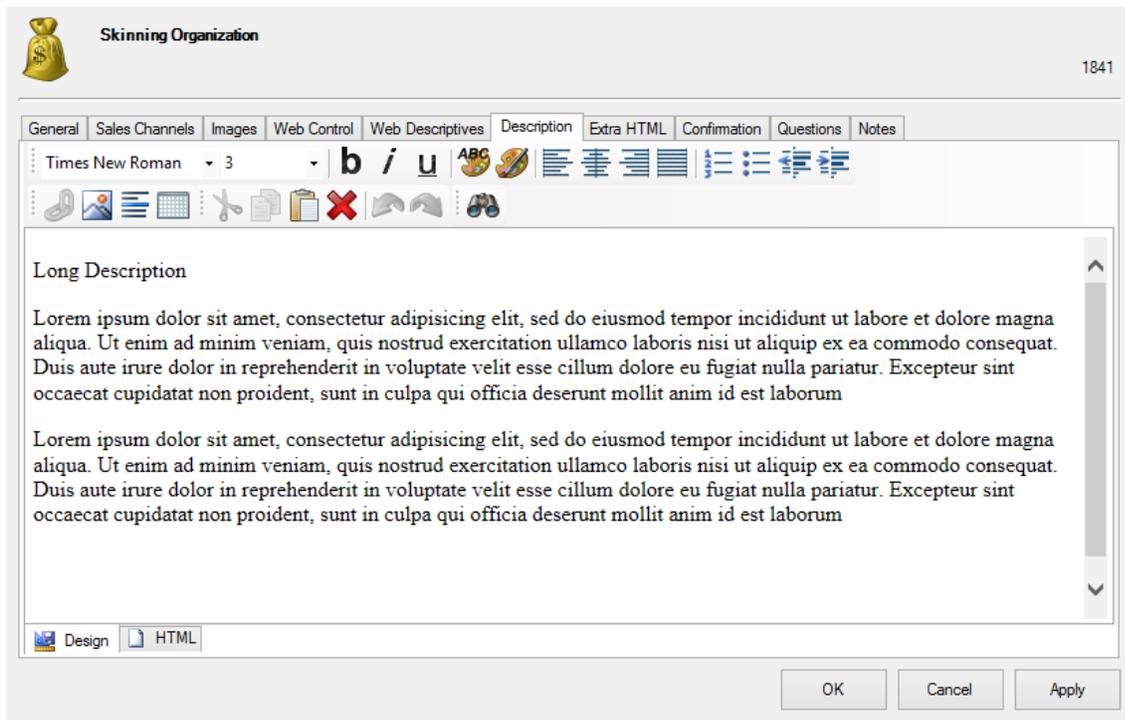
- \$25.00
- \$50.00
- \$100.00
- \$150.00
- \$200.00
- \$500.00
- \$1,000.00
- 0.00 (Enter an amount)

Make Donation

\$500 level and above qualifies for member passes.

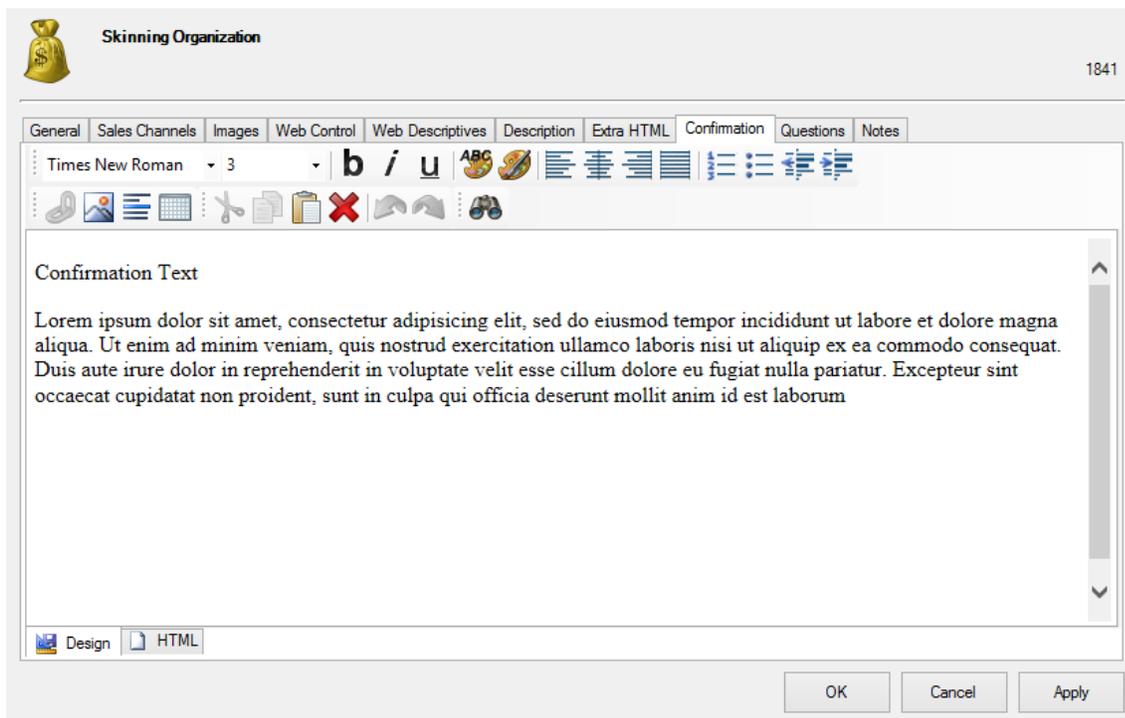
\$1,000 level qualifies for free popcorn.

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](#).

The screenshot shows a software window titled "Skinning Organization" with a gold money bag icon and the number "1841". The "Questions" tab is active, displaying two columns: "Available Questions" and "Selected Questions". Between these columns are four arrow buttons: ">", ">>", "<", and "<<". At the bottom of the window are "OK", "Cancel", and "Apply" buttons.

*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.

The screenshot shows the same "Skinning Organization" window with the "Notes" tab selected. The main area is a large, empty text box. At the bottom are "OK", "Cancel", and "Apply" buttons.

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