

Online Giving Form Configuration

Updated Jul 19, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

Overview

The screenshot shows a web browser window with the URL <https://giving.veracross.com/vcsandbox/athletics>. The page features the Veracross School Information Management logo at the top. The main content is titled "2012 Athletic Help" and includes a table of "Annual Giving Levels" and a "GIFT TYPE" selection area.

Annual Giving Levels		
Leadership Giving Society		
Forum		\$25,000 or more
Pacesetters		\$15,000 - \$24,999
Forum		\$25,000 or more
Forum		\$25,000 or more
Forum		\$25,000 or more
Gift Clubs		
Forum		\$25,000 or more
Blue & gray Associates		\$15,000 - \$24,999
Forum		\$25,000 or more
Young Alumni/ae Leadership		

GIFT TYPE

Donation Pledge

HOW MUCH WOULD YOU LIKE TO GIVE?

\$15 T-SHIRT \$50 SWEATSHIRT \$150 ROUND OF GOLF

- 0 - OTHER AMOUNT

Powered by Veracross

The Online Giving Form provides donors with a way to make online donations and/or pledges to the school per individual campaign or fund. A link to the Online Giving Form can be placed on the school's website and on the parent portal. This form is accessible to users through normal web browsers and is optimized for mobile device access.

Using the personal information (i.e. donor information) submitted on the form, Veracross attempts to match the donor and the pledge/donation made with a current person in the database. If an existing person record is found, all pledge or donation information will be added to the person's record. If no match is found, Veracross will treat the donor as a new person in the system and create a new person

record. Development offices can then review and process the online gifts using the 'Pending Gifts' tab on the Online Giving Form detail screen. Learn more about [processing online gifts](#).

Online Giving works in conversation with [Veracross Checkout](#). Contact your Account Manager if this is not set up.

Please Note: The Online Giving Form is an extra cost, additional feature of the Development module. If your school is interested in setting up Online Giving, please contact your Account Manager.

Creating a New Online Giving Form


Online Giving is managed per campaign or fund. Forms can be viewed from the 'Online Gift Forms' query under the 'Configuration > Online Gifts' section on the Development homepage.

There are two options for setting up a new Online Giving form:

- 1. Reuse a Completed Annual Giving Fund or Campaign Form**

Use a completed annual giving fund or campaign Online Giving form by simply changing the Title and Form URL of the form. Reusing a form has the advantage of maintaining all the old donations and pledges (i.e. from the prior campaign(s) or fund(s)) on the Donations or Pledges tabs on the Online Giving form's detail screen.

- 2. Add a New Online Giving Form**

Add a new Online Giving form for the current annual fund or campaign from the Development homepage. Development offices can add as many Online Giving forms as they would like. To add a new form, hover over the  button in the top right hand corner of the Development homepage and select 'Online Giving Forms.'

Online Giving Form Configuration

There are four major steps to configuring an Online Giving Form.

- 1. Basic Form Configuration**

Set up for which campaign or fund the Online Giving form is receiving donations/pledges and how the form should capture gift and donor information.

- 2. Form Instructions**

Configure additional text or instructions for the Online Giving Form

- 3. Form Fields**

Configure which fields are available on the form, and, of those fields, which ones are required to make an online gift.

4. Amounts Options (optional)

The form can be configured to provide the donor pre-defined giving amount options. These options are presented as clickable buttons for quick and easy giving.

Basic Form Configuration

The general tab of the online giving form allows the school to configure the high-level settings for the form, including default campaigns and funds, what types of gifts can be made, and how payments are processed. The fields are grouped into several areas of configuration:

General

- **Title:** enter the title for the Online Giving Form. This displays in the title bar of the browser and at the top of the form.
- **Status:** specify the publication status of the form. While the form is being configured, mark the status as 'Draft.' When all the information is added and ready to be made available online, change the status to 'Published.'
- **Gift Type:** specify what type of gift a donor should be able to make using this form. Options include 'Donation or Pledge,' 'Donation Only,' or 'Pledge Only.'
- **Form URL:** enter the last part of the URL to create the web address for the form (e.g. gala_2013). Text entered must be lower case, contain no spaces, and no punctuation other than '-' or '_'.

This value must be unique. Having the same url for two different forms is not only confusing, but will cause errors.

- **Live URL:** the live URL populates automatically when the Online Giving Form is added or updated. As soon as the form status is set to 'Published,' this link becomes active and can be placed on the school's website or on the parent portal through a portal link.
- **Test URL:** the test URL populates automatically when the Online Giving Form is added. This link can be used to access a test version of the form while it is being configured. It is not made public until the status is changed to 'Published.'

Pledge Options

If a form is configured to allow online pledges, there are a few additional settings that allow the Development office to determine how pledge information will be displayed to the donor:

- **Installment Calculation:** determines how pledge amounts can be entered by the donor and how installment schedules are calculated. There are two options available:
 1. **Total Pledge Amount:** This configuration allows the donor to enter the total amount of their pledge. Donors will be given the option to select how much they would like to give based on the predefined amounts configured by the school (see the Adding Amount Options section

below), or they can enter another amount that they wish to pledge. Depending on the options selected for the frequency and number of installments, the system will automatically calculate the individual pledge installment amounts to equal the total pledge amount entered by the donor.

2. **Installment Amount & Frequency:** This configuration allows the donor to enter the amount that they would like each installment to be, and the system will then calculate the total pledge amount for them based on their selections for frequency and number of installments.
- **Installment Types Allowed:** This configuration allows the school to control if they want to allow single installment pledges only, multiple installment pledges only, or let the user pick the installment type.
 - **Max Number Installments:** allows the Development office to limit the number of pledge installments that can be selected by donors when making a pledge online (e.g. donors can select no more than 10 installments into which their pledge amount is distributed). The maximum number of installments that can be allowed is 30.

Confirmation Email Templates

- **Donation Template:** select a custom email template that is used to send a confirmation email to the user when they make a donation. By default the form will use the Online_Giving_Donation_Confirmation system email template.
- **Pledge Template:** select a custom email template that is used to send a confirmation email to the user. By default the form will use the Online_Giving_Pledge_Confirmation system email template.

Gift Defaults

- **Default Campaign:** select a campaign to which pledges or donations created by the Online Giving form should be applied.
- **Default Event:** select an event to which pledges or donations created by the Online Giving form should be applied.
- **Default Fund:** select a fund to which pledges or donations created by the Online Giving form should be applied.

Payment Overrides

Schools have the option of overriding which payment providers they would like to use for processing online gifts. Selecting a payment provider for either Credit Card or ACH will override the school's default payment provider. Do *not* set these fields if no override is needed.

Design

- **Logo URL:** include a link to any size logo. This logo appears at the top of the page. The logo displays best if it is a transparent .png file, or has the background color #EFEFEF. While this logo

can technically be any size, it is assumed to be a part of the top background image, which has a height of 350 pixels. However, if the "Full Screen BG?" toggle is set to YES, the background populates the entire screen and the 350 pixel limit no longer applies.

- **Background Image URL:** Schools can change the background image that appears on the giving form. The image must be a hosted jpg image.
- **Button Color:** change the color of the buttons (pledge or donation amount buttons, Continue to Payment button, etc.) on the form. Colors should be in [hex value](#) (e.g. #FFFFFF).

Form Instructions

The form instructions tab of the online giving form allows the school to add description text to the top of the form and change the prompt text that users see.

- **Public Notes:** Additional text or instructions for the Online Giving Form can be added below the title using the 'Public Notes' field. This notes box supports [HTML](#) syntax for text formatting. See note below.
- **Prompt Text:** By default, the user will see the text "How much would you like to give?" before entering an amount. The school can override this text with a different value using this field.

Note on HTML Editing: Click the <> button to edit the HTML of the Public Notes directly. Before clicking Update, click the <> button again to return to the visual interface, at which point any changes should be reflected. Click Update to confirm changes.

Form Fields

The form fields tab of the online giving form allows the school to configure which gift and donor information fields are displayed on their form, as well as which fields are required for the donor to complete.

Gift

Additional information about the pledge or donation being made may be captured at the time the form is submitted. Set the flag next to each field under the Gift section to 'yes' or 'no' to display or hide the field on the form.

- **Display In Honor Of/Display In Memory Of:** set the flag to 'yes' to display a text field on the Online Giving Form in which donors can enter 'in honor of' or 'in memory of' information.
- **Display Notes:** set the flag to 'yes' to display a text field in which donors can enter additional notes about their pledge or donation.
- **Display Anonymous:** set the flag to 'yes' to display an anonymous checkbox option on the Online Giving Form.
- **Display Matching Organization:** set the flag to 'yes' to display a matching organization checkbox

and amount option on the Online Giving Form.

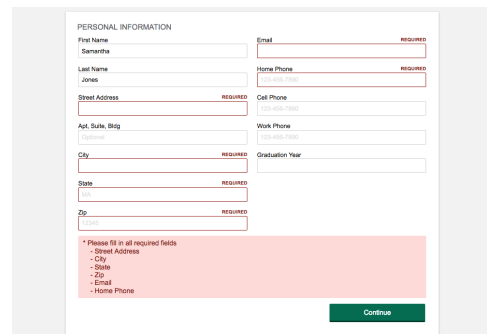
- **Profile Code Category 1 and 2:** if the field is set to, the drop-down profile code field will not display on the form. If the field is set to a value, the profile code category will appear on the form with a drop-down menu containing any profile codes within that category. If the donor selects an option from the drop-down menu (e.g. Annual Gift Designation), the profile code will be applied to the pledge or donation.

Donor

In order for a donor to be able to continue to payment, the address, email, graduation year, and phone home fields must be selected to display on the online form. Cell and business phone information can also be collected.

Required Fields

- **Required Fields Textbox:** can be used to override which fields donors should be required to fill out on the form. As a default, the First Name, Last Name, Address, City, State, Zip, Email, and Home Phone fields are required. To change the required fields from the default, enter the field alias names into the 'required fields' text box (see below for a list of field aliases). Field names must be entered in a comma delimited list with a comma and single space separating each field name. To keep the default required fields for the form, leave the text box blank.



The screenshot shows a form titled "PERSONAL INFORMATION" with the following fields: First Name (Samantha), Last Name (Jones), Street Address, Apt. Suite, Bldg, City, State, Zip, Email, Home Phone, Cell Phone, Work Phone, and Graduation Year. A red box at the bottom contains the text: "* Please fill in all required fields" followed by a list: "- Street Address", "- City", "- State", "- Zip", "- Email", "- Home Phone". A green "Continue" button is at the bottom right.

The field alias names that can be used for 'required fields' are: first_name, last_name, address_1, city, state, zip, email, phone_home, phone_mobile, phone_business, and graduation_year.

Adding Amount Options

Pre-defined giving amounts can be added to the Online Giving Form using the 'Giving Amounts' tab of the online giving form detail screen. Enter the amount and a description (e.g. \$50 | If you give this amount you earn a free t-shirt!). These amounts will appear as live buttons on the form which donors can choose when selecting an amount, or donors can enter their own amount.

Access

Once an Online Giving Form has been published, schools can access the links to the forms by selecting the "Online Giving Forms" link located under the Configuration section on the Development homepage. Form links are available in the "Live URL" column.