

Configuring Online Giving Forms 2.0

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 the 'RECURRING DONATIONS' configuration page in the Veracross system. The interface includes a navigation menu on the left with sections for CONFIGURATION, GIFT TYPES, ACTIVITY, and PROCESSED GIFTS. The main content area is divided into several tabs: General, Confirmation Email, Bank Accounts, and Credit Cards. The 'Giving Amounts' tab is active, displaying a table of recurring donation records. The table has columns for Color, Public Title, Amount, Schedule, Public Schedule Title, Public Schedule Subtitle, Public Notes, and Sort Key. There are four records listed, each with a unique color and schedule.

| Color | Public Title | Amount | Schedule | Public Schedule Title | Public Schedule Subtitle | Public Notes | Sort Key |
|---------|----------------------|------------|-----------|-----------------------|--------------------------|---------------------------------|----------|
| #80D9CD | Circle of Support | \$5.00 | Weekly | Every Week | On Mondays | This is a cup of coffee a week! | 5 |
| #2AA6B2 | Circle of Excellence | \$25.00 | Monthly | Every Month | 1st of the Month | | 10 |
| #165978 | Leadership Society | \$500.00 | Monthly | Every Month | 1st of the Month | | 20 |
| #032E61 | Trustee Society | \$2,500.00 | Quarterly | Every 3 Months | 1st of the Month | | 30 |

There are many options for configuring online giving forms from the online giving form record. This article details the options available to you, broken down by tab, as well as directions for creating new online giving forms.

All functionality surrounding recurring donations and saved payment methods via the wallet require that your school purchase the VCPay Core module. If you would like more information about this functionality, please speak with your account manager for further details.

Accessing and Creating Online Giving Forms

Accessing Existing Online Giving Forms

| ID | Description | Access Name | Status | Version | Enabled Gift Types | Internal Notes | View Live Form | View Test Form |
|----|------------------------------|------------------------|-----------|-----------|---|----------------|--------------------------|--------------------------|
| 1 | 2012 Athletic Help | athletics | Published | Version 1 | Donations, Pledges | For Testing | Click... | Click... |
| 2 | Advisory / Projects | spaces-are-not-allowed | Published | Version 1 | Donations | | Click... | Click... |
| 6 | The Fall Classic 2013 Spo... | fall-classic | Draft | Version 1 | Donations | | Click... | Click... |
| 7 | COPY - The Fall Classic 2... | fall-classic-1 | Draft | Version 1 | Donations | | Click... | Click... |
| 8 | Library Renovations | libraries | Published | Version 1 | Donations, Pledges | | Click... | Click... |
| 9 | Art Gallery | give-now | Published | Version 1 | Donations | | Click... | Click... |
| 11 | Alumni Form - Class of 2... | Class-of-2000 | Published | Version 1 | Donations | | Click... | Click... |
| 12 | Annual Fund 2013-2014 | AF2013 | Published | Version 1 | Donations, Pledges | | Click... | Click... |
| 13 | Soccer Field | Soccer_Field | Draft | Version 1 | Donations, Pledges | | Click... | Click... |
| 14 | L Test Form | success1 | Published | Version 2 | Donations, Recurring Donations | | Click... | |
| 15 | Veracross Academy Fund | test | Published | Version 1 | Donations, Pledges | | Click... | Click... |
| 16 | Online Giving | online-giving | Published | Version 2 | Donations, Pledges, Recurring Donations | | Click... | |
| 25 | Test Form | test-form | Draft | Version 2 | Donations, Pledges, Recurring Donations | | Click... | |
| 31 | Test4 | test45 | Draft | Version 2 | Donations, Pledges | | Click... | |
| 32 | test5 | test5 | Draft | Version 2 | Donations, Pledges | | Click... | |
| 33 | Test | test-v2 | Draft | Version 2 | Donations, Pledges | | Click... | |

To access existing online giving forms, begin on the Development homepage. click on the **Online Giving Forms** query in the Online Giving sub-section of the Configuration section. From the query results screen, all rows that are highlighted light blue are version 2.0 of Online Giving Forms, while non-highlighted rows are still using Online Giving Forms 1.0.

Creating New Online Giving Forms

ADD ONLINE GIVING FORM (v2)

GENERAL

General

DESCRIPTION:

ACCESS NAME:

STATUS:

VERSION:

STATUS:

DEFAULT CAMPAIGN:

DEFAULT FUND:

DEFAULT EVENT:

Preview

PUBLIC TITLE:

VIEW LIVE FORM: [Click...](#)

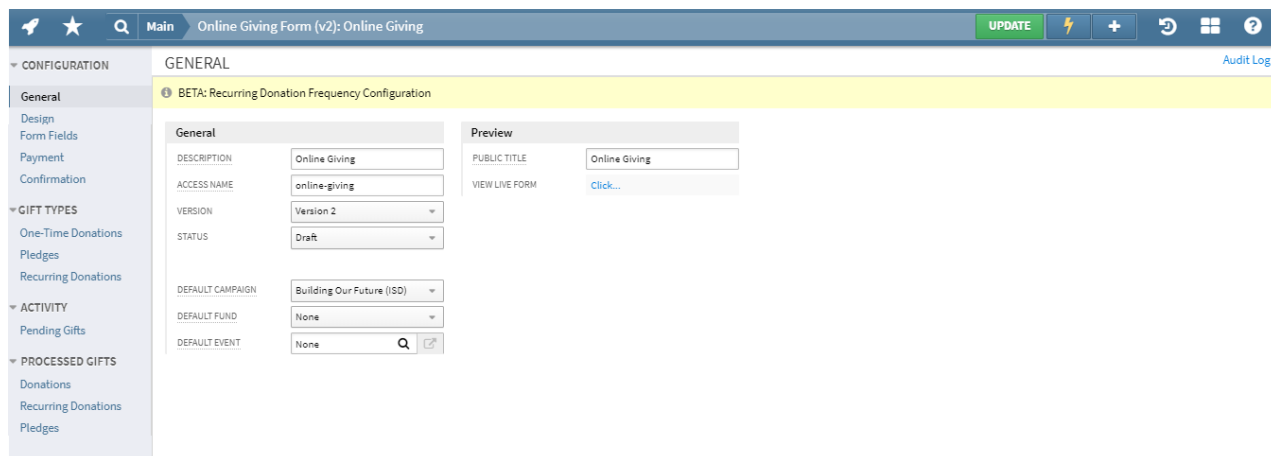
To create new online giving forms, start from the Development homepage and click on the **Add an Online Giving Form (v2)** link in the Online Giving sub-section of the Configuration section. This presents a blank detail screen (pictured above) that you should fill in as you wish. The only fields that are required upon initial creation are the Description field and the Access Name field. Clicking the Add Online Giving Form (v2) button automatically adjusts the version type to Version 2.

The Online Giving Form Record

Online giving forms can be customized almost entirely from their record. This section will go through each tab on the online giving form record and let you know what each field does. Additionally, many of the fields have helpful tool tips that can be accessed by hovering your mouse over the name of the field.

Configuration

General Tab



The following fields are on the General tab of the online giving form record.

| Field | Information |
|------------------------------------|--|
| Description | sets the internal name for the online giving form and has a character limit of 50 characters. This field is required. |
| Access Name | sets the "slug" that appears in the URL to designate this online giving form. This field is required. <i>Example: giving.veracross.com/schoolname/give/</i> |
| Version | drop-down menu that displays the version of the online giving form that this record is. Using this functionality, it should always read Version 2. |
| Status | drop-down menu that allows you to choose between "Published", "Draft", or "Archived". While working on this form, set the status as Draft, when it is live, set it as Published, and when you wish to take the form down, set the status as Archived. |
| Public Title | the name of the form that appears in the titlebar of the browser when viewed and has a character limit of 50 characters. This field is mirrored by the Public Title field in the Design content category. If this is left blank, this defaults to: + "Form". |
| View Live Form | a link that redirects opens a new tab to the live online giving form. |
| Default Campaign/Fund/Event | drop-down menus where you can select which campaign, fund, and group event gifts received through this online giving form are assigned to and associated with. |

| Field | Information |
|-------|-------------|
|-------|-------------|

Design Tab

The following fields are on the Design tab of the online giving form record.

| Field | Information |
|-------------------------|---|
| Public Title | the name of the form that appears in the titlebar of the browser when viewed; this has a character limit of 50 characters. This field is mirrored by the Public Title field in the General content category. If this is left blank, this defaults to: + "Form". |
| Public Notes | the header text that appears on the top segment of the online giving form . Basic HTML is accepted in this field, and there is no character limit. |
| View Live Form | a link that redirects opens a new tab to the live online giving form |
| Background Type | drop-down menu that allows you to select the background for the online giving form. Options are: <ul style="list-style-type: none"> • No Background: sets the background as a neutral grey color • Full Screen Color: sets the background as the color you select in the Background Color field • Full Screen Image: sets the background as the image you define in the Background Image URL field • Half Screen Color: sets the background as a split between the neutral grey described in the No Background option (bottom) and the color you selected in the Background Color field (top). • Half Screen Image & Color: sets the background as a spit between the Background Color field value (bottom) and the Background Image URL image (top). |
| Background Color | sets the color used in the background for all background type options that include color. The input must be hex code and a color picker may be opened by clicking the colored box next to the field |

| Field | Information |
|-----------------------------|---|
| Background Image URL | image link to set your background image in background type options that include images. A preview of the image is located beneath in the Background Image Preview section. |
| Display Header Text | toggle whether or not to display the Public Title and School Name in the header. |
| Banner Image URL | image link to set your banner image. A preview of the image is located beneath in the Banner Image Preview section. |
| Header Image URL | image link to set your header image. A preview of the image is located beneath in the Header Image Preview section. |

Form Fields Tab

This tab allows you to configure which gift and donor information you wish to have displayed on the online giving form. Additionally, it allows you to further configure options for gifts and profile codes. The options are:

Gift Details

- Display Anonymous
- Display Matching Organization
- Display In Honor Of
- Display In Memory Of
- Display Notes

Personal Details

- Home Address
- Home Phone
- Email
- Mobile Phone

- Work Phone
- Graduation Year

The **Required Fields** field allows you to designate which fields on your online giving form are required for the donor to fill out. Each field listed in this text box should be separated with a comma and a single space. Options for this field are:

- first_name
- last_name
- address_1
- city
- state
- zip
- email
- phone_home
- phone_mobile
- phone_business
- graduation_year

Payment Tab

Payment related fields will be moving to Gift Type tabs on 12/17/20 and the payments tab will be removed.

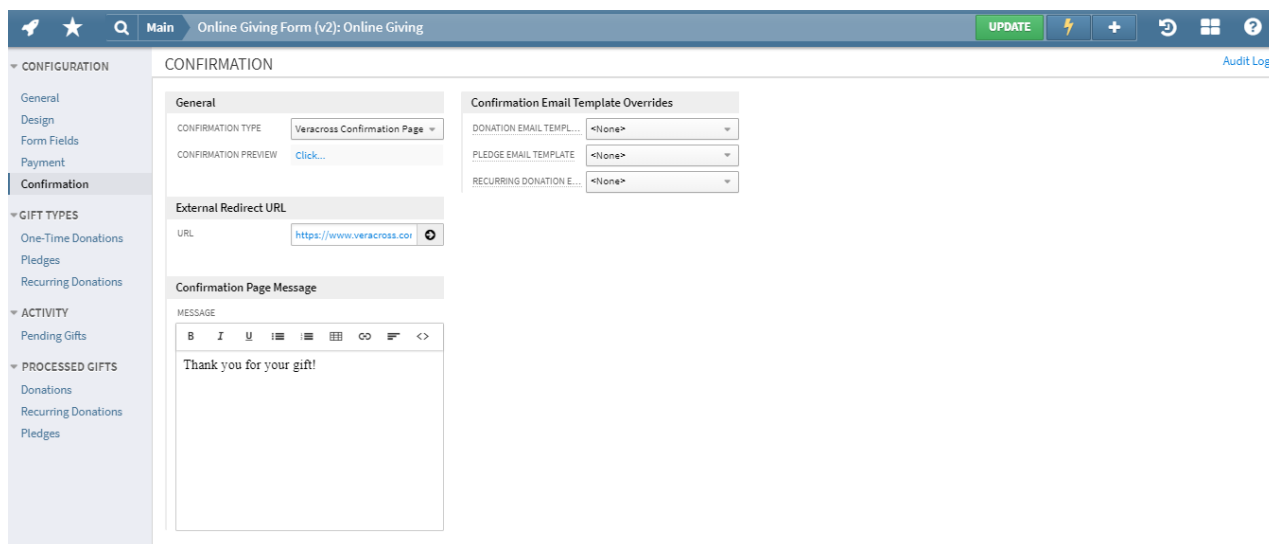
One-Time Donations

The Payment tab allows you to set an override for **One-Time Donations only**. Toggle whether or not this form accepts credit cards or ACH payments. If no override is configured, the default gateway configurations (see Checkout Gateways on the System homepage) will be used for processing One-Time Donations.

Recurring Donations

Submit a ticket in the Veracross support portal to configure a gateway for processing all **Recurring Donations**.

Confirmation Tab



The screenshot shows the 'CONFIRMATION' configuration tab in the Veracross system. The left sidebar lists navigation options: CONFIGURATION (General, Design, Form Fields, Payment, Confirmation), GIFT TYPES (One-Time Donations, Pledges, Recurring Donations), ACTIVITY (Pending Gifts), and PROCESSED GIFTS (Donations, Recurring Donations, Pledges). The main content area is titled 'CONFIRMATION' and includes an 'Audit Log' link. It features several configuration sections: 'General' with 'CONFIRMATION TYPE' set to 'Veracross Confirmation Page' and a 'CONFIRMATION PREVIEW' link; 'External Redirect URL' with a URL field containing 'https://www.veracross.co'; 'Confirmation Page Message' with a rich text editor containing 'Thank you for your gift!'; and 'Confirmation Email Template Overrides' with dropdown menus for 'DONATION EMAIL TEMPL...', 'PLEDGE EMAIL TEMPLATE', and 'RECURRING DONATION E...' all set to '<None>'. A top navigation bar includes 'Main', 'Online Giving Form (v2): Online Giving', and buttons for 'UPDATE', '+', and a help icon.

The Confirmation tab is where you configure the confirmation a donor receives after giving or pledging money with the giving form. The two options are set via the **Confirmation Type** drop-down menu and are:

| Type | Setup & Considerations |
|-----------------------------|---|
| Veracross Confirmation Page | At completion of the form, user is directed to a page with a short message, which is defined in the Confirmation Page Message field. |
| External Redirect | At completion of the form, user is redirected to an external URL that can be populated in the External Redirect URL field. |

Regardless of the confirmation type selected, preview them by clicking on the **Confirmation Preview** link.

Additionally, this tab has options available for overriding confirmation email templates that are also mirrored on the Confirmation tab. These only need to be set if you do not want to use the default email templates for sending confirmation emails – if you'd like to use the default templates, leave these values as .

Gift Types

There are many options for configuring gift types on online giving forms. This article details the options available to you, broken down by gift type including recurring gifts and recurring donation

schedules. Learn about the options by reading [the article here](#).

Activity

Pending Gifts Tab

| Online Gift ID | Status | Amount | Gift Type | Paid? | Receipt Date | Donor | First Name | Last Name | Home Phone | Email | Match? | Matching Organization |
|----------------|---------|-------------|--------------------|-------|--------------|---------------|------------|-----------|--------------|-------------------------|--------------------------|-----------------------|
| 935 | Pending | \$5.50 | Donation | NO | Sep 30, 2019 | Shah, Kinnell | Kinnell | Shah | | f4p7z2u7n9k9v3q2@ver... | <input type="checkbox"/> | None |
| 936 | Pending | \$45.00 | Recurring Donation | NO | Sep 30, 2019 | Shah, Kinnell | Kinnell | Shah | 508-393-9300 | f4p7z2u7n9k9v3q2@ver... | <input type="checkbox"/> | None |
| 938 | Pending | \$5.50 | Donation | NO | Sep 30, 2019 | test, test | test | test | 5785412589 | test@test.com | <input type="checkbox"/> | None |
| 939 | Pending | \$25.00 | Recurring Donation | NO | Sep 30, 2019 | Shah, Kinnell | Kinnell | Shah | 508-393-9300 | f4p7z2u7n9k9v3q2@ver... | <input type="checkbox"/> | None |
| 940 | Pending | \$25.00 | Recurring Donation | NO | Sep 30, 2019 | Shah, Kinnell | Kinnell | Shah | 508-393-9300 | f4p7z2u7n9k9v3q2@ver... | <input type="checkbox"/> | None |
| 941 | Pending | \$50.00 | Recurring Donation | NO | Sep 30, 2019 | Shah, Kinnell | Kinnell | Shah | 508-393-9300 | f4p7z2u7n9k9v3q2@ver... | <input type="checkbox"/> | None |
| 942 | Pending | \$25,000.01 | Donation | NO | Sep 30, 2019 | test, test | test | test | 5785412589 | test@test.com | <input type="checkbox"/> | None |
| 943 | Pending | \$5.00 | Recurring Donation | NO | Sep 30, 2019 | Shah, Kinnell | Kinnell | Shah | 508-393-9300 | f4p7z2u7n9k9v3q2@ver... | <input type="checkbox"/> | None |
| 944 | Pending | \$5.00 | Recurring Donation | NO | Sep 30, 2019 | Shah, Kinnell | Kinnell | Shah | 508-393-9300 | f4p7z2u7n9k9v3q2@ver... | <input type="checkbox"/> | None |
| 932 | Pending | \$5,000.00 | Pledge | NO | Sep 25, 2019 | None | | asd | | asd@gmail.com | <input type="checkbox"/> | None |
| 933 | Pending | \$50.50 | Recurring Donation | NO | Sep 25, 2019 | Shah, Kinnell | Kinnell | Shah | 508-393-9300 | f4p7z2u7n9k9v3q2@ver... | <input type="checkbox"/> | None |
| 934 | Pending | \$5,000.00 | Pledge | NO | Sep 25, 2019 | Test, Test | est | test | | f4p7z2u7n9k9v3q2@ver... | <input type="checkbox"/> | None |
| 927 | Pending | \$5.00 | Donation | NO | Sep 20, 2019 | Shah, Kinnell | Kinnell | Shah | 508-393-9300 | f4p7z2u7n9k9v3q2@ver... | <input type="checkbox"/> | None |

This tab contains an embedded query of all gifts gathered through this online giving form that:

- do not have a Status of Complete
- have a gift type of Pledge, Pledge Payment, Recurring Donation **OR**
- have a "Paid?" value of YES

Processed Gifts

Processed Gifts Tabs

These tabs show all processed gifts obtained through this online giving form, split between gift type.