

*Portal Prodigy*<sup>™</sup>  
**Donations Feature in Detail**

Chapter Excerpt from Software User & Administration Guide

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[www.portalprodigy.com](http://www.portalprodigy.com)

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## 1.1 Introduction

This chapter describes the Donations feature component in detail. This feature allows your organization to accept online credit card donations. It provides a simple easy to use donations entry form where contributors can specify the amount they wish to donate and provide payment information. The feature supports PortalProdigy's standard payment options including automated credit card authorization. Donations are administered using PortalProdigy's standard transaction and reporting features.

Benefits of the Donations feature include:

- Zero cost source of revenue.
- Simple and easy to use.
- Credit cards can be automatically processed.
- Contributor automatically tracked in contact database.
- Easy to administer.
- Automated tracking and donations reporting.

Some of the components, fields and settings of the Donations feature, discussed in detail in this chapter, are:

### **Donations Feature Management**

#### **Page**

Page Title

Instructions

HTML Edit Icon

Confirmation Checkbox Label

Auto Broadcast Template

Administrator Notification

Template

Administrative Notification Email

Browse Icon

Save button

Print button

Cancel button

Close button

Question

Amount

Payment Type

Account Number

Card Verification Number

Help finding CV Number

Name on Card

Expiration Date

Cancel button

Submit button

### **Donation Entry**

Your Name

Your Email Address

Your Address

City

State/Province

Country

Zip/Postal Code

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

## 1.2 The Visitor Experience

Visitors use the following page to submit their donation.

**Make a Donation**

Your support is greatly appreciated.

Donation Information	
Your Name:	<input type="text"/>
Email Address:	<input type="text"/>
Your Street Address:	<input type="text"/>
City:	<input type="text"/>
Country:	<input type="text" value="USA"/>
State/Province:	<input type="text" value="California"/>
Zip/Postal Code:	<input type="text"/>
<input type="checkbox"/> I'm a citizen of the USA and 18 years or older	
Amount:	<input type="text"/> \$
Payment Type:	<input type="text"/>
Account number:	<input type="text"/>
Card Verification Number:	<input type="text"/> ( <a href="#">Help finding your Card Verification Number</a> )
Name on Card:	<input type="text"/>
Expiration Date (Month/Year):	<input type="text" value="MM"/> <input type="text" value="YY"/>

The visitor provide basic contact information, enters the dollar amount they want to donate, and enters their credit card information. After submission a confirmation page is displayed and PortalProdigy automatically sends the contributor a thank you by email.




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## 1.3 Components

The following components are used to configure and manage the Ask the Expert feature.

### 1.3.1 Donations Features Management page:

To access the Donations Feature Management page click on the features

  icon located on the Site Management menu column of the Main Administration Menu (Ctrl-Alt-m). Then click on the [Donation](#) Link .



**Donations Features Management**

**Feature Options**

Page Title: Make a Donation


Instructions: Your support is greatly appreciated. 



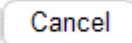
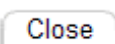
Confirmation Checkbox Label: I'm a citizen of the USA and 18 years or older

Auto Broadcast Template:

Administrator Notification Template:

Administrator Notification Email:

- **Page Title** – used to define the page title for the Donations Entry page.
- **Instructions** – used to define instructions that are displayed below the page title on the Donations Entry page. The  HTML Editor option can be used to create and edit the instructions.
- **Confirmation Checkbox Label** – used to have contributor confirm a statement by checking a checkbox. E.g. a political action organization might need to confirm “I’m a citizen of the USA and 18 years or older”; a winery might need to confirm “I’m 21 years or older”.
- **Auto Broadcast Template** – used to select a broadcast template used to format the email sent to the contributor.
- **Administrator Notification Template** – used to select a broadcast template used to format the email sent to the specified administrator.
- **Administrator Notification Email** – enter the email of an administrator to receive notification each time a donation is submitted.


	Saves the Donations Features Management settings entered on this page.
	Print the current page (contents of your browser window) according to your browser’s print settings.
	Close the page discarding all entries and edits.
	Close the page and save changes. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL

	response discards all entries and edits (same as Cancel button).
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### 1.3.2 Order Management page:

When a donation is submitted, an Order record and a Payment record are created.

**Order Management**

Order For: ☐ Events ☐ Ads ☐ Products ☐ PressReleases ☐ Membership ☐ ExchangeListings ☒ Donations 

Bill To: ☐ Company ☐ Individual Ship To: [Copy from Billing](#)

Name:

Attn:

Address 1:

Address 2:

City:

Country:

State/Province:

Zip/Postal Code:


Phone:  x   x

Fax:

Email:

Order Status:  Financial Status:  Ref. Order#:

Terms:  Payment Type:  P.O#:

Contact ID:  Order Type:  Order Date:  

Order ID:  Related Record:

Salesperson ID:   Placed By:

Ordered Qty	Shipped Qty	B.O. Qty	Canceled Qty	Part#	Product	Unit Price	Extended Price
1	0	0	0	DONATION		\$25.00	\$25.00

See the chapter of this guide titled Order Features in Detail for an explanation of how to manage and process orders.

## 1.4 Feature Administration

Using Donations Features Management, permitted Administrators can enable/disable and configure the PortalProdigy Donations feature component. When a donation is submitted, an Order record and a Payment record are created. Permitted Administrator use Order Management to manage and process Donation Orders. Depending on the payment options configured in Payment Features

Management, permitted users use Payments and Payments Authorization pages to process donation payments.

The following need to be configured before online Donations can be accepted:

- Create an email broadcast template for formatting thank you emails sent to Contributors.
- Create an email broadcast template for formatting Administrator notification sent each time a donation is submitted.
- Enable and configure Donations Feature Management options.
- Create a link to Donation Entry. Typically this is done using either Menu Builder or Mini Browser Builder.

Donation payments are processed the same as payments for other feature components. They follow the rules established in Payment Features Management.

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## 1.5 Tutorials

The following tutorials explain how to configure and use the Ask the Expert feature.

### 1.5.1 Configure the Donations Feature

#### Setup acceptance of online credit card Donations

1. Prerequisites that directly pertain to setup of Donations include:
  - a. Read chapter of Administrator Manual titled “Orders Features in Detail”.
  - b. Read chapter of Administrator Manual titled “Payments Features in Detail”.
  - c. Follow the steps outlined in the Quick Tutorial “Create Automatic Thank You Email for Donors”.
2. Go to Site Administration Menu.
3. Click on the Features Go To icon located in the Site Management section.
4. Enable Donations by checking the Donations checkbox.
5. Click on Donations link to go to the Donations Features Management page.
6. Enter a Title such as “Make a Donation”

7. Enter instructions, guidelines, and other applicable information. You may enter as text, cut and paste either HTML or text, or click the HTML Editor icon to use PortalProdigy's HTML WYSIWYG Document Editor. See the Quick Tutorial titled "Using the HTML Editor".
8. To enable a confirmation such as "I am a United States citizen or a permanent resident alien. (required)." Enter text up to 80 characters in length. The text along with a checkbox will be displayed on the Donation entry form.
9. Select an Auto Broadcast Template that was created by following the steps outlined in the Quick Tutorial "Create Automatic Thank You Email for Donors".
10. Select an Administrator Notification Template that will be used to format the administrator email notification sent each time a donation is submitted
11. Enter the email address of the administrator to send notification to each time donation is submitted
12. Click Close and confirm to save.
13. Go to Site Administration Menu.
14. Add a Link to the Donation Page:
  - a. Read Menu Builder section of chapter titled "Features Management Menu in Detail" of Administration Manual.
  - b. Click the Features edit icon on the Site Administration Menu Page.
  - c. Click on Menu Builder link.
  - d. Search for menus.
  - e. Select applicable menu by clicking on its title.
  - f. Click on Add Menu Item button (Lower right of Menu Items table)
  - g. If applicable select a Topic.
  - h. Enter the Items name such as "Make a Donation".
  - i. Enter a Sort Order number.
  - j. Menu Item Option provides four choices. Click the radio button corresponding to 'Option'.
  - k. Select "Donation Entry" from the Option list box.
15. Click Close button and confirm save.

16. You are finished.

## **1.5.2 Create Automatic Thank You Email for Donors**

The Auto Broadcast message is delivered when a donor submits a donation from the Donation Entry page.

1. Read the Quick Tutorial titled “Activate and Setup the Donations Feature”
2. Read the chapter titled “Broadcasting Features in Detail” in the Administration Manual.
3. Click the Broadcasting add icon on the Site Administration Menu page.
4. Select Type = Email
5. Set Object Type = Order
6. Enter a sender’s address in Sender’s Email field. Usually an address is set up on organizations mail server such as [donationsmgr@yourdomain.com](mailto:donationsmgr@yourdomain.com)
7. Enter *Your Organization Name* + “thanks you for your donation” into Subject field.
8. Type or copy and paste the following into message field:

Dear <%Order:ContactFirstName%> <% Order:ContactLastName%>

Thank you for your donation ...

Your continue support is greatly appreciated.

Feel free to contact:

*Name of Person*

*Email address*

*Phone number*

Sincerely,


*Your Organization Name* ☺

9. Click on Save button

## **1.5.3 Print a Donations Report**

This report contains all information submitted during Donation Entry.



1. Go to Site Administration Menu.
  2. Click on the Orders Report icon located in the Transaction Management section.
  3. Click on Donations Report.
  4. Enter criteria such as date range.
  5. Enter Order By criteria.
  6. Click the  button.
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