CENTRAL TERRITORY: CLASSY FUNDRAISING QUICK-START GUIDE

DONATION FORM TEMPLATE

Each division has a template in their account that has already been optimized to meet brand standards and best practices, AND has been customized with your local information.

You retain the ability to edit everything when using the template. **The goal of the template is two-fold – 1)** Help us all optimize our use of the Classy technology by providing the donor with a consistent and positive experience, and **2)** Reduce the amount of work and time it takes for divisions to launch a donation form.

These local customizations have been made for each division:

- Logo at top of the donation form links to your divisional website
- Divisional service area, address and phone number in the footer of every step of the donor experience
- Divisional social media links added in Settings
- “Reply To” email set as your division’s Classy representative for the internal autoresponder, “Campaign administrator invite.” This is the email that deploys when you make someone an administrator of a campaign/donation form. All other emails reply to the customer service/organization email established in Settings.

These aspects of the form have been customized to meet best practices and brand standards:

- Donation options (communication opt-in, donor covering fees, default giving levels, etc.) set with regard to best practices within The Salvation Army
- FAQs that address some of our most common donor questions
- Optimized text for social sharing platforms and a pre-sized image for Facebook *(recommend updating per campaign, but not necessary)*
- Customized header and footer design – Including optimally sized logos, use of colors that align with brand standards, public-facing location names and information, etc.
- Language customized to match our brand voice and guide the donor throughout the giving experience, including: the thank you experience, all seven email autoresponders (including subject lines/preheader text/body copy), the ask for donor’s to cover fees, the tax clause, etc.

VIDEO BEST PRACTICES: As a best practice, Classy never recommends adding video to the donation form because it disrupts the gift completion process. Video can have a positive impact during the thank you experience though. For video added to the thank you page or emails, you should *always* disable the load of related videos. During our testing, we were not able to successfully do this, as pasting a video link that includes the needed code to disable related videos yielded no results. We have a support case in about this, so please wait to add any video until we have a resolution. The plan is for this video - https://www.youtube.com/watch?v=L01gpJomYrE&feature=youtu.be – to be included in the thank you page template for each division.

CREATING A LOCAL DONATION FORM

Here are the steps you'll need to take to create a new form using the provided template.

1. Log into your account at Classy.org and click on the Fundraising tab
2. Hover over the name of your division's template and click to duplicate it.
3. Rename the template with a name that uniquely identifies your appeal. Remember that local donation forms should only be created for one of the following uses: to designate funds to a specific program/service, a specific location, or both. They should also be used to track the effectiveness of your marketing efforts. They should not be used for undesignated giving, as that is the main purpose of the national form.
4. **Make these necessary updates:**
    - **Details – About**: Update the Program Designation. Program Designations must first be created from your login dashboard, under **Settings – Program Designation**. A new designation should be created for each appeal. Follow the format previously communicated, which is TER-DIV-CORPS + {appeal} + {source}. Brackets are not meant to be included. Example: **USC-EMI-ANN ARBOR-YOUTH-EMAIL**
    - **Pages – Donation Page**: Update the "Headline" and "Donation Appeal" fields – There is placeholder text to guide you for how to best write these.
    - **Pages – Donation Page**: Update the Background Image (1280x720 px at 72 dpi) to match the campaign. *(NOTE: We recommend using the Cover and Fixed display option. The preview for this image in set up is not how it will display if you use the suggested dimensions. To see a true preview of the background image, use the Preview button at the top of the page.)*
    - **Details – Sharing**: Update the six digit numbers in the links that will be included when a donor shares on their social media accounts about their giving experience. Otherwise, donors will be sharing the template form with placeholder text. To find the six digit code for your new appeal donation page, preview the page (go to the donation form editor, then use the preview links at the top). The code you are looking for is the only number in the URL. Optionally, update the social sharing text to match the specific appeal too. The current text was written to be broad enough to function for most appeals, even if it is not updated.
    - **Email – Email Dashboard – Donation Receipt/Recurring Donation Receipt**: Update the first paragraph language in these two emails so that they match the appeal the donor gave to (click on the title of the email to edit it). Include the location and fund use (program/service) that their donation will support to reaffirm that the funds will be going to the same place indicated on the form.

5. **Optionally make these updates:**
   - **Settings – Organization Email (optional)**: This is not a necessary update and a process will be in place at THQ to ensure that customer service emails received through the current email address – donorcare@usc.salvationarmy.org – will be sent to your division in a timely manner. ***Only update this field if your division already has a generic customer service email for donors in Lotus Notes that is NOT tied to an individual.*** Never use an individual's email address. Read more about why under the Settings header below.
   - **Details – Campaign Contact (optional)**: Change this only if you meet the above criteria and have made a change in Settings – Organization Email. If you update this in the template before you duplicate it, it should replicate for any duplicate templates in all areas where an email address displays or is listed as the "Reply To" email. Double check this by looking at the email listed in the footer of the form/thank you page/emails and by editing all autoresponder emails to ensure the correct "Reply To" email is in place.
   - **Pages – Thank You Page (optional)**: Update the Background Image (1280x720 px at 72 dpi) if you want the image on the thank you page to match your appeal. If you do not update this, there is already a default image that should work for most appeals. *(NOTE: We recommend using the Cover and Fixed display option. The preview for this image in set up is not how it will display if you use the suggested dimensions. To see a true preview of the background image, use the Preview button at the top of the page.)*
   - **Details – Sharing (optional)**: Update the Facebook image (1200x630 px at 72 dpi) if you want the image donors can share on social media after giving to match the appeal. If you do not update this, there is already a default image that should work for most appeals. *(NOTE: The preview for this image in set up is distorted, but the image that is shared will not be if you use the suggested dimensions.)*
   - **Details – Donation Page (optional):** Turn on the option for donors to dedicate their gift. Then customize the additional fields that are revealed. ***Enabling this option is not recommended for every form that you create.*** If you turn this on, you will also want to update the email called Dedication Ecard under Email – Email Dashboard, as this is what the honoree receives to learn that someone has honored them. It is a best practice to only enable this when there is a specific reason for doing so and the option to honor or memorialize someone is being included in the marketing for the appeal. A good example would be enabling it on a form created for the Christmas season where donors are giving to purchase Christmas Day meals for families or individuals in need. Due to the type of that appeal and the time of year, there could be added benefit to offering donors the ability to honor someone with their donation. Promoting the option to make an honor gift as an alternative Christmas gift for the person who has everything would be a key piece in the marketing for the effort.

SETTINGS

The fields managed under your account Settings (found on the dashboard when you first log in) are more than just general account information. Most of the fields are also tied to public-facing information on the donation form and in the autoresponder emails. What is input here displays in multiple places throughout the donor experience and cannot be edited per appeal/form. For this reason, we have thoroughly tested where each field in Settings also displays and completed it for your division with the recommended format. We do not recommend making changes, as it will negatively impact the donor's full giving experience.

Here are some specific examples:

- **Name:** This field is public-facing on the thank you page and autoresponder emails, and cannot be edited per appeal. This was intentionally set as "The Salvation Army" and NOT your full division name. This field replicates in multiple places, but here's one example: When the donor completes a gift on a form that tells them the funds will be designated to a specific local unit, the thank you page and confirmation email will still display the divisional office name as the benefitting location if we enter the full division name in Settings. We want the donor to feel confident that when they give to us, we honor where we say the funds are going. Simply using "The Salvation Army" allows us to ensure we don't send them conflicting details about who/which location they are giving to.
- **Street Address:** Including your area of service here, written to be public-facing, is intentional and important. This field replicates in the footer of every step of the donation process. As opposed to just listing the divisional headquarters street address, since it's located in just one of the many communities we serve, we added the service area to help the donor understand they are in the right place and can receive help no matter where they live in the division.
- **Organizational Email**: The email listed here is very public, and intended to be the primary means for customer service. It displays on the thank you page (not editable) and is the default "Reply To" address for all email communications a donor receives (editable, but tedious to do). We are continuing the best practice we established in Luminate to NOT use an individual's email address for customer service. A primary reason for this is that if that individual is out of the office or leaves their role, there would be hundreds of places that their email address would be replicated and need updated across your division's donation forms. It's tedious and unnecessary. This should also always be a Lotus Notes email address. The email address entered currently – donorcare@usc.salvationarmy.org – is an email that will be monitored by the Central Territory headquarters. Donor inquiries will be forwarded to the appropriate division as they are received. If your division ***already has a generic customer service email for donors in Lotus Notes that is NOT tied to an individual***, you can input that here using the instructions under the Optional Updates above, but it is not necessary. In regard to ensuring your division's Classy account administrators receive the appropriate system notifications, we have the ability to control those under Settings – Notifications. Here you can separately determine which divisional user will receive notices of failed gifts, chargebacks, etc.

CREATING USERS

User accounts have been created for the Classy representative in each division. That person will have the ability to add other users to their divisional instance of Classy as needed, including reporting staff, content/form creators, vendors and finance team members.

To add a user, login at Classy.org and go to Settings – Account Admins. Read the access levels carefully. The most common level of access you should be granting is Campaign Manager. All vendors should only have Campaign Manager level access. They should not be given Global Admin access, as they do not need to update our account settings. There should only be one or two Global Admins at your division, and they should be internal staff. Keep in mind that, in addition to the user options listed here, you have the ability to add a campaign administrator to a specific appeal. In that case, they only have the ability to edit forms they are assigned to.