

Get Started with Online Giving for COVID-19

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Introduction

For the scope of this class we're going to focus on getting online giving set up with Bloomerang as quickly as possible, so that you can continue to fundraise during this difficult time. With that in mind, we've broken down the topics of this class into 3 main sections:

1. Essentials for Getting Started with Online Giving
 - a. These are the bare essentials you need to create opportunities for constituents to contribute financially to your organization online
 - i. Creating a Campaign
 - ii. Adding a Transaction Processor
 - iii. Adding Fraud Prevention tools
 - iv. Creating an Online Form
2. Getting Your Form to Your Constituents
 - a. Here we'll be looking at different ways of delivering an Online Giving Form to your constituents
 - i. Adding an Online Giving Form to a website
 - ii. Bloomerang-hosted Forms
 - iii. Adding either of the above to an email template
3. Keeping Track & Following Up
 - a. These are ways you can keep track of online giving
 - i. Campaign progress on the dashboard
 - ii. Reporting on Forms or Campaigns
 - iii. First Time Donor Calls

Essentials for Getting Started with Online Giving

Create a Campaign in Bloomerang for Crisis Fundraising

Campaigns track large fundraising efforts aimed at raising a goal amount of money. You can associate Campaigns with Online Giving Forms, so everything that is raised via an Online Form would go towards this Campaign.

Help Article:

[Create and Manage Funds, Campaigns, and Appeals - HDV](#)

Add a Transaction Processor

Bloomerang integrates with two transaction processors.

- Stripe: credit card only
 - Email nonprofit@stripe.com to get nonprofit pricing
- Moolah, which you might know as Authorize.Net: credit card and EFT

Help articles:

[Pricing comparison between Stripe and Moolah](#)

[Add Stripe to Bloomerang - HDV](#)

[Add Moolah/Authorize.Net to Bloomerang - HDV](#)

Fraud Prevention Tools

Help articles:

[Prevent Fraudulent Transactions - HD](#)

[ReCAPTCHA - Sign Up and Increase Form Security - HD](#)

Create an Online Form

Online Giving Form

- Create transactions on the constituent's timeline when the form is submitted
- Need at least \$1 to go through
- Allows you to receive donations online
- No limit to the number of forms you can create
- Make sure there is only one form of each type on a page

Help article:

[Create Online Giving Forms - HDV](#)

Getting Your Form to Your Constituents

Add a Giving Form to your website

If your website has a security certificate and you have ReCAPTCHA enabled, the form populates directly on your website.

Help article:

[Add Bloomerang Forms to Your Website - HD](#) (This may vary depending on your website's CMS.

Chat with our Support team if you need help!)

- Security certificate
 - With a security certificate, the form populates directly on the website
 - If you don't have a security certificate, Bloomerang still has you covered. A button that says "Donate securely via Bloomerang" is displayed. Where does this go?

Bloomerang-hosted Forms

If you don't have a security certificate, Bloomerang still has you covered. A button that says "Donate securely via Bloomerang" is displayed. This goes to a secure portal hosted by Bloomerang.

How to get to Bloomerang-hosted form:

1. Go to Settings > Website Integration > Online Giving Forms.
2. Click the blue drop down arrow beside the form name and go to View Hosted Form
 - a. You can use any button, image, text to hyperlink directly to this page

Add your Form to an Email

Create an email in Bloomerang and insert a button to your online giving form.

1. Drag and drop a button block onto your template, or click an existing button block to edit.
2. Change the text of the button and use the toolbar to apply formatting.
3. Edit the button properties in the content properties panel as needed.

Check out our brand new, ready-to-use [COVID-19 Email Templates](#).

Keeping Track & Following Up

Campaign Progress

[How do I make a campaign visible on my dashboard? - FAQ](#)

Report on Online Giving

Create a report to:

- Keep track of online donations
- Monitor Campaign progress
- Determine follow-up action (e.g. acknowledgement letters, phone calls)

Create a new Transaction-based report from scratch

- Include Filter:
Online Form is... COVID19 Online Donations (or whatever you named the form)
OR Campaign is COVID19 (or whatever you named the campaign)

If they're getting donations to the Campaign in other ways, this will cover all the donations to the Campaign

- Other filters to consider: Date, Fund, Appeal, etc.

If you need help setting up your report, please contact support@bloomerang.co or initiate a live chat online.

First Time Donor Calls

You may be seeing many new first time donors on the dashboard, and you can take action with them from there.

1. Click the donor name for more information
 - a. Assign a Task to another user to make the call
 - b. Add an interaction by clicking Enter a Call
2. Click Enter a call to add an interaction for the call
3. Click See full report to see a report of all of these first time donors

Help article:

[First-Time Donor Calls Basics - HDV](#)