



How to Build a Raisely Donation Page

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11 September 2023

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Introduction to Raisely

Raisely is a platform designed to help charities, non-profit and community organisations create and manage online fundraising campaigns and donation forms. It provides tools and features for creating customisable donation forms, campaign websites, and other fundraising assets.

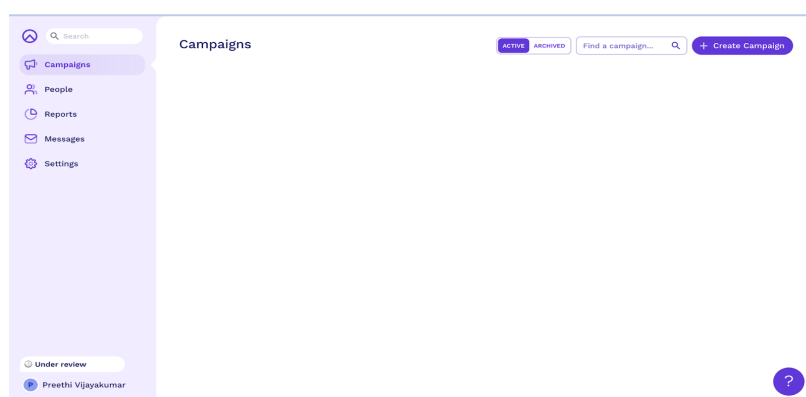
How to Register

Let's begin by going to the Raisely website (<https://raisely.com/>). There are two ways to get started.

- Login - If an account exists already.
- Get Started - If an account doesn't exist already, a free account can be created.

Log In

If an account already exists, we can log in directly which will take us to the Raisely Homepage.



Get Started

To get started and create a free account, the following details must be filled in.

Create your account

Let's start by creating your account that you'll use to sign into Raisely. With this account, you'll be able to create as many campaigns as you need!

Full Name

Preferred Name

Email

Password

Stay in the loop
Get regular updates with new features, fundraising tips, trends, and training to hit your fundraising goals. We'll be in your inbox about twice a month, and you can opt-out at any time.

Yes, send me Raisely's regular email updates

Create my account

Already have an account? [Login here](#)

Note: You will be asked to choose a template and create a campaign while setting up an account. This can also be done later using the Raisely Homepage.

Campaign and Fundraising

Once logged in, you must create a campaign to set up your donation form for fundraising. A New Campaign can be created by clicking the 'Create Campaign' button on the Raisely Homepage.

Campaigns

ACTIVE | ARCHIVED | Find a campaign... | + Create Campaign

Under review

Preethi Vijayakumar

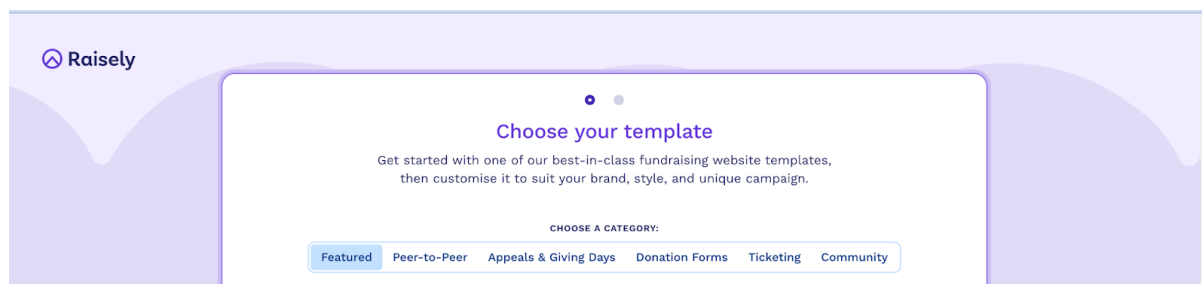
Organisation Country: Australia

How did you hear about us? is required

Who can use Raisely?
To use Raisely you need to be a charity, non-profit or community organisation. You also need to be aligned with our values, which [you can view here](#).
If you are an individual fundraising for charity, you need to contact the charity directly.

I am signing up on behalf of a registered charity, non-profit,

You will be asked to choose a template from the available category of templates to get started with.



Note: We are choosing 'Donation Forms' as we are trying to set up donation forms.

Creating a Campaign

Provide a name for the campaign (Example: General Donations, URL can include the Organisation's name to make it unique) and set a fundraising goal (Example: \$100,000,000). These can be changed by the Organisation at any time. Campaign Currency should always be set to Australian Dollars.

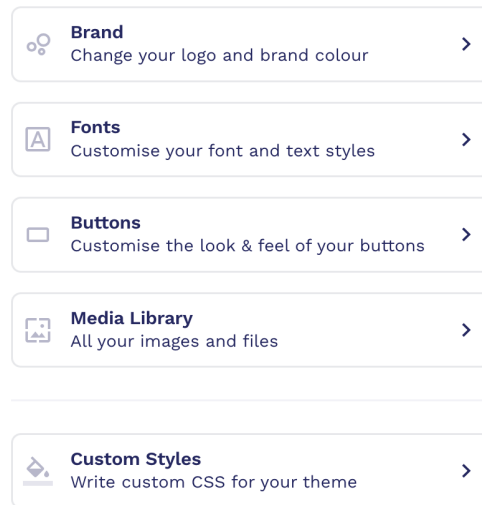
Customise your Donation Form

Following the campaign creation, you will be prompted to customise the Donation form.

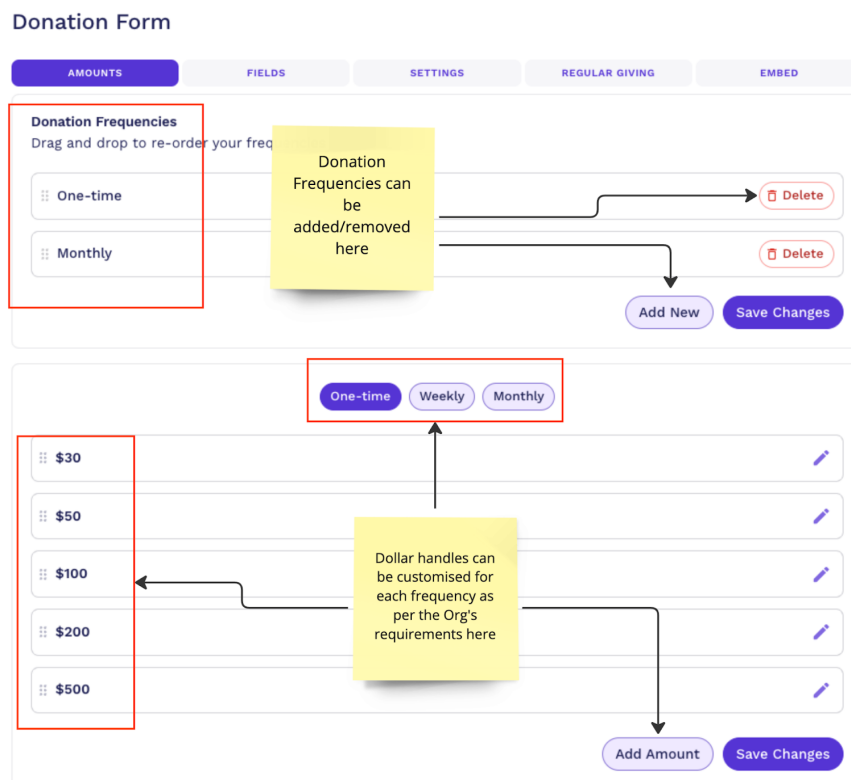
Customise the following elements

- A logo and a Campaign image can be included
- The donation form amounts can be customised to provide helpful suggestions and make it more convenient for donors.

Design



- **Design** - Choose the colours, fonts and styles that match your organisation's branding or the theme of your campaign. Only use colours and fonts mentioned in the Style Guide provided by the Organisation.
- **Dollar Handles**



- **Form Fields** – It is important to keep the Form Fields concise, and do not add Address field in the donation form – Kindly notify Jessica if they ask you to include it. Fields to include are First Name (Standard), Last Name (Standard), Email (Standard), Keep my donation anonymous (Standard).

Donation Form

AMOUNTS **FIELDS** SETTINGS REGULAR GIVING EMBED

Donation Form Fields
These custom fields will be gathered on each donation form

Visible

- First Name * CORE
- Last Name * CORE
- Email * CORE
- Mobile
- Is this donation in the name of a business?
- Business or Organisation Name
- Your Message CORE
- Keep my donation anonymous CORE
- Newsletter Sign Up

Hidden

You don't have any hidden fields.

Add New

Add New

miro

Please follow this standard order of Fields

- **Hidden Fields** – Hidden fields such as Salesforce Campaign ID, or Donation Type can be added to pass a certain default value on Raisely campaigns. These are useful to fulfil custom requirements inside Salesforce, as processes can be built around these hidden fields to execute a certain action based on process decisions.

- **Donation Form Settings** –

Donation Form

AMOUNTS FIELDS **SETTINGS** REGULAR GIVING EMBED

Donation Form Settings
Customise the global settings for all the donation forms across your site.

CURRENCY SETTINGS

Allow donors and fundraisers to choose a currency?

FORM STEP HEADINGS

Details Step Heading
Your Details

Payment Step Heading
Your Payment Details

THANK YOU

Thank You Title
Thank you for donating [donation.amount]

Thank You Message
Thank you so much [donation.firstName] for helping our fundraiser.

You can use the following merge fields to personalise your thank you title and message: [donation.amount], [donation.firstName], [donation.lastName], [donation.title], [donation.team]

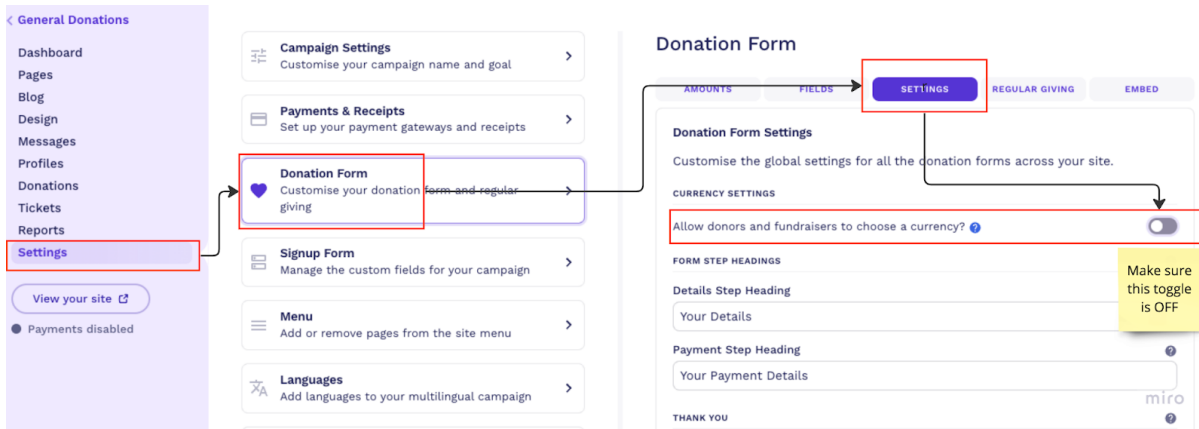
Share URL
If you'd like your donors to share a non-Raisely site after giving, paste the custom URL here.

Preview Donation Form Save Changes

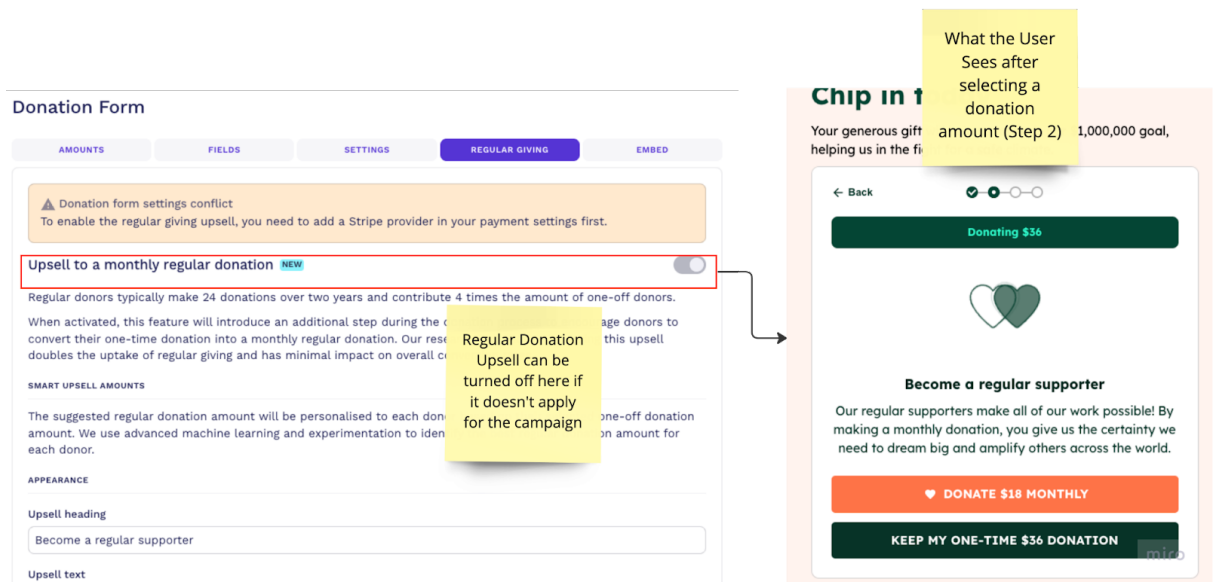
miro

Donation Form's headings for each tab can be customised here, but for most Orgs this won't be necessary.

- **Currency** – Always ensure to turn OFF the “Allow donors and fundraisers to choose a currency” option which can be found under the Settings Tab in the Donation form to prevent multiple currencies. This must be done in each Raisely campaign – So that it defaults to the Campaign Currency (AUD).



- **Regular Donation Upsell Setting**



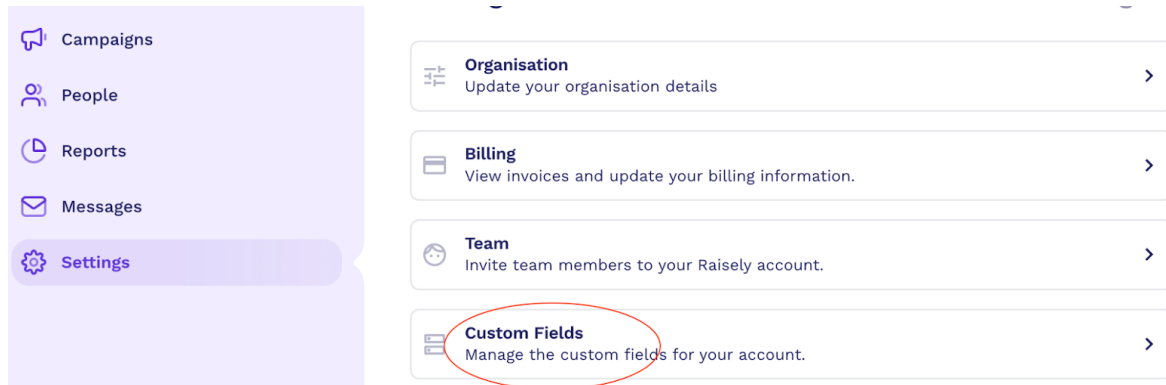
Note:

- *The campaign image, design and logo can also be updated by navigating to 'Design' on the Campaign menu.*

- The donation form can also be customised by navigating to 'Settings' on the Campaign menu.

Custom Fields

Set up the following Custom Fields in Settings at the top level



If Movedata is being used as the Integration platform between Raisely and Salesforce, the you MUST include the following fields

| Field ID | Label | Additional Comments |
|---|---|---|
| phone | Mobile or Mobile Phone | Type: Phone Number |
| Is this donation in the name of a business? | Is this donation in the name of a business? | Type: Checkbox Field |
| company | Business or Organisation Name | Type: Text Conditional Visibility = Only when "Is this donation in the name of a business?" is Checked TRUE |
| Newsletter Sign Up | Yes, sign me up for news and updates (Or something warm/greeting) | Type: Checkbox Field Default Value = Checked. Help Text: "Your privacy is |

| | | |
|--|--|--|
| | | <p>important to us. Please see our Privacy Policy.</p> |
|--|--|--|

Note: Please pay attention to the names as the Field ID is used by MoveData, but the label can be customised as per the business requirements/needs.

Create the Custom Fields as shown below:

Mobile Phone phone
CANCEL ^

Name

Field ID

Type

Enabled

Field Security

Default Country

Default Value

Placeholder

Info Text

You can add a small, explanatory note to your users (just like this one). This can be overridden per campaign.

Custom Validation

This lets you add your own regex to validate a form field against.

Delete
Cancel
Save ?

Is this donation is on behalf of a business, organisation or community group? isThisDonationIsOnBehalfOfABusin
CANCEL ^

Name

Field ID

Type

Enabled

Field Security

Default Value

Info Text

You can add a small, explanatory note to your users (just like this one). This can be overridden per campaign.

Custom Validation

This lets you add your own regex to validate a form field against.

Delete
Cancel
Save

Business Name company CANCEL ^

Name
Business Name

Field ID company **Type** Text

Enabled **Field Security**

Default Value

Placeholder ?

Info Text
Only use this is you do not want the receipt to be in your own name
You can add a small, explanatory note to your users (just like this one). This can be overridden per campaign.

Custom Validation
This lets you add your own regex to validate a form field against.

Newsletter Opt In newsletterOptIn ^

Name
Newsletter Opt In

Field ID newsletterOptIn **Type** Checkbox

Enabled **Field Security**

Default Value
Checked

Info Text
Sign up for our newsletter, so can learn all about the good your donation will do. Your privacy is important to us. Please see our&nbs
You can add a small, explanatory note to your users (just like this one). This can be overridden per campaign.

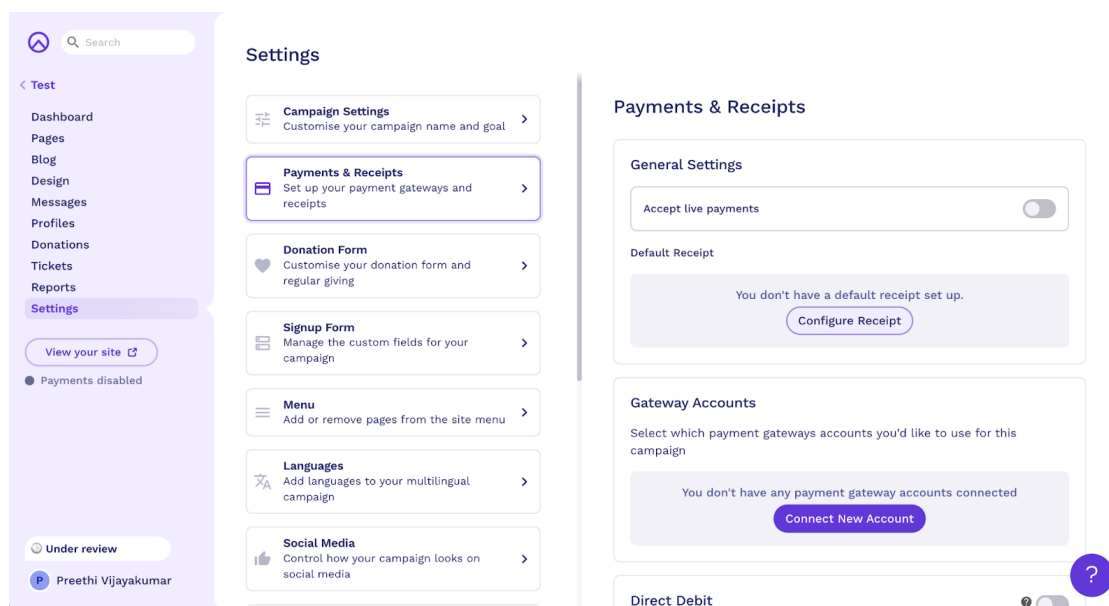
Custom Validation
This lets you add your own regex to validate a form field against.

UTM Fields

UTMs are tracked automatically in Raisely and parsed to Salesforce via MoveData, if the organisation has it. The Donation Extension Flow using Custom Fields on Opportunity will need to be created and updated to receive the data. Reports can then be built on Opportunities to assess the donations by UTM.

Set Up Payment

To collect donations, you will need to connect your Raisley account with a payment gateway account. Raisley supports various payment gateways like Stripe or Paypal.



Follow the prompts to link the payment processor account to Raisley. This allows you to securely process the donations.

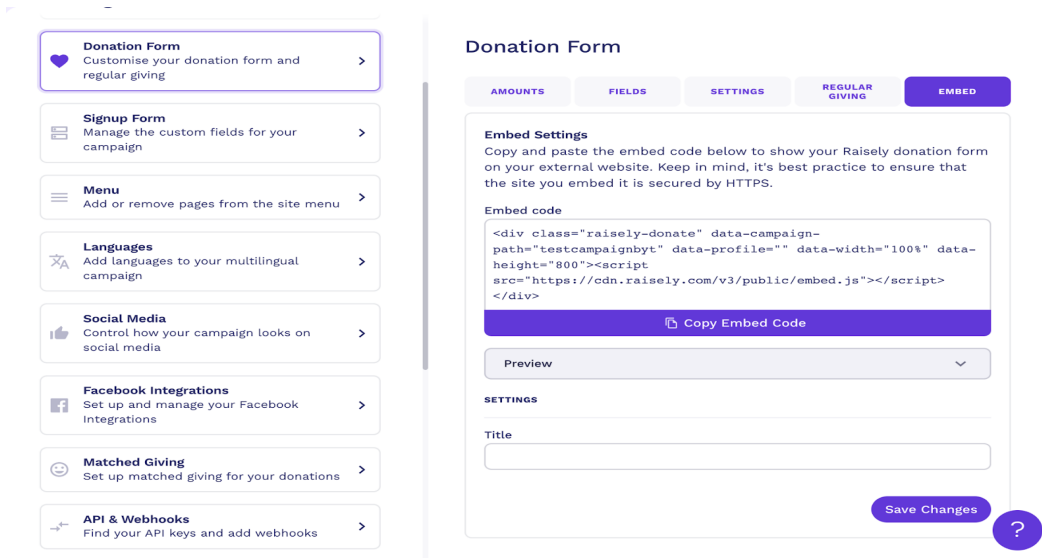
Out of the box, Raisley displays the accepted Credit Card symbols at the bottom of the payment form. To remove these, add the following to the Custom Styles (CSS) in Design:

// Hide Credit Card Logos on the Donation Form. Added by Name on Date

```
.donation-form__payment-logos {  
display: none !important;  
}
```

Adding Donation form to website

Raisley provides an 'Embed code' that can be easily added to your website or landing page. You can copy and paste the embed code, where you want the donation to appear.



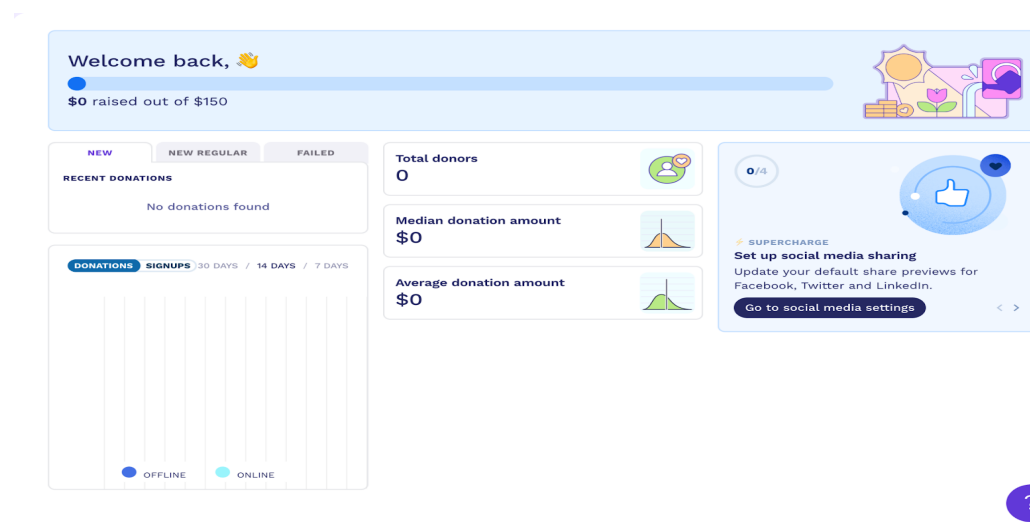
Test the form on the website to ensure it functions properly.

Promoting the Campaign

Your campaign can be shared on social media, through email newsletters and on your organisation’s website. Supporters can also be encouraged to share the campaign with their networks to broaden their reach.

Monitor and Engage

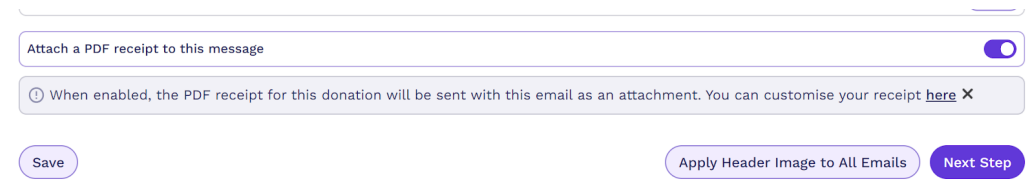
Raisely Dashboard needs to be regularly checked for updates on donations and donor information. Donors need to be kept updated regarding the campaign’s progress and they can also be appreciated for their donations by sending thank you emails.



Say Thank You

Pages can be customised to show gratitude for donors by sending personalised thank you messages. Once the donor makes a payment the campaign can be set up to redirect to the 'Thank you page where a warm personalised message can be displayed.

Your Donation Receipt should include attaching the PDF Receipt:



The screenshot shows a user interface for configuring a donation receipt. At the top, there is a toggle switch labeled "Attach a PDF receipt to this message" which is currently turned on. Below this is a help text box that reads: "When enabled, the PDF receipt for this donation will be sent with this email as an attachment. You can customise your receipt [here](#) ✕". At the bottom of the form, there are three buttons: "Save", "Apply Header Image to All Emails", and "Next Step".

PDF Receipt

When you attach the PDF receipt, there is no need to mention the receipt details in the body of the message where you can instead share information about your organisation, your mission or be profuse in your thank you. You can also include the option for your donor to share the Campaign on their socials. A big hero image at the top, that matches your campaign, can be meaningful. Examples below:



Thank you

Dear {{reveal donation.firstName}}

Thank you for testing the Donation Form on the Blaze Your Trail demo.

Blaze Your Trail provides free training and work experience for migrants, and pro bono projects for small but mighty charities.

We believe that our workplaces should reflect the communities we serve, and that by helping people who are locked out of the job market due to lack of local work experience, we can make the world kinder and fairer.

This is a test donation receipt only and is not tax deductible.

Warm wishes,
Jessica Macpherson OAM
Founder
Blaze Your Trail



Thanks {{reveal donation.firstName}}!

You donated #Donation Amount!

Thanks so much for your generous donation of #Donation Amount to Olivia's Place in support of Gippsland families.

Your donation will help us provide new and expectant parents with social and emotional support, as well as all the material items they need to provide a safe home for their new baby.

Would you like to **run your own fundraiser** to help Olivia's Place? You can get together with your friends, family or work colleagues to have a morning tea or other fundraising activity. [Sign up here](#) if this sounds like something you would love to do.

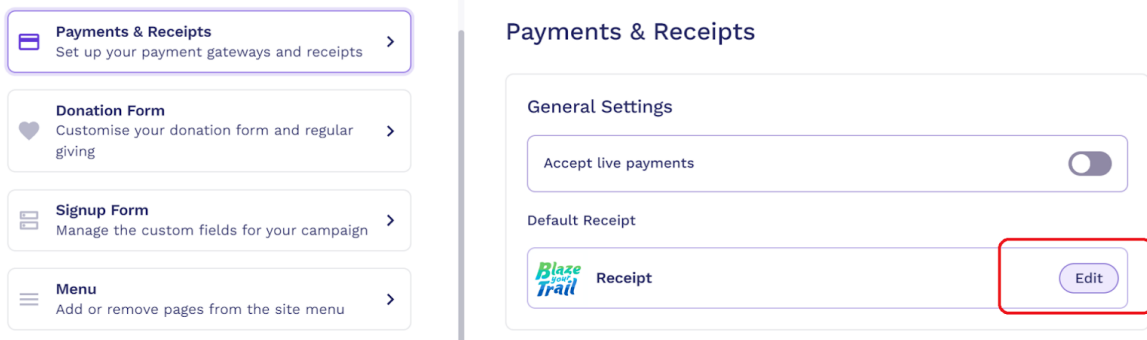
You could make your donation go even further by sharing your donation with friends and encouraging them to donate too.

[Share On Facebook](#)

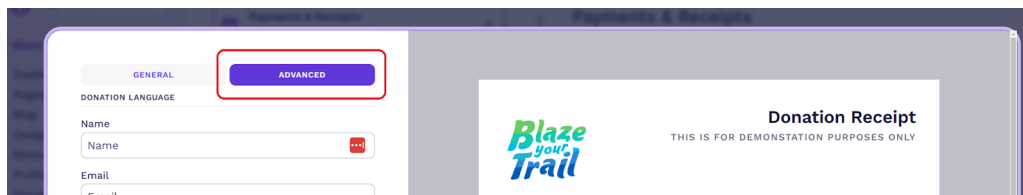
Please find your tax receipt attached

ABN: 53 439 178 710

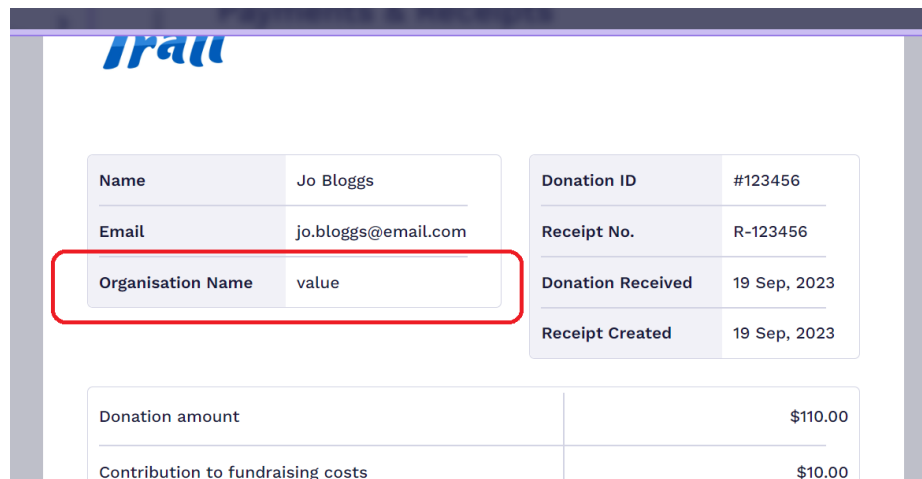
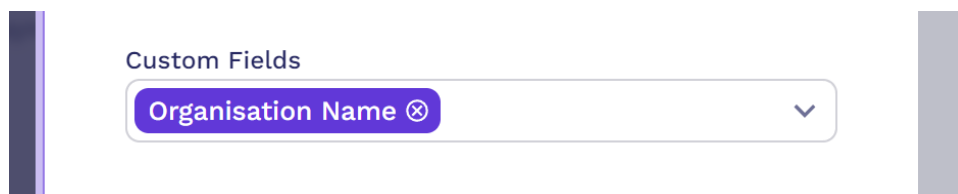
Your PDF Receipt is configured in Payments (in Settings).



After setting all of the fields (including signature) in the **General** tab, switch to **Advanced**:



Scroll to the bottom and ensure that you add the field for Business Name in the Custom fields section. This is so that the Business Name will appear on the PDF Receipt if the donor has chosen to make a donation in the name of a business:



Regular Donor Thanks

Regular donors should have clear communication as to what they have agreed and committed to in their welcome email. You can do this in either of the following ways:

Thank you

Thanks Leila!

You're our newest regular giver.

You've started a donation of \$26.25 every 1 month to support Blaze Your Trail. You can manage your donation at any time from your account, or by clicking the button below.

As a regular donor, we won't send you donation receipts every month but you WILL receive a tax statement in July of each year showing all donations made in the previous financial year.

[Manage my Donations](#)

Regular Donation Details

Olivia's Place ABN 53 439 178 710

Reference: 12345

Date: 03/12/2020

| | |
|-----------------------------------|----------------|
| Donation to Blaze Your Trail Demo | \$25.00 |
| Contribution to processing costs | 1.25 |
| Frequency | Every 1 month |
| Total | \$26.25 |

Donation Received from:

Leila de Lima

harveymilk@example.com

If you choose to include the following paragraph, make sure you **turn off** the **Regular Donation Receipt**:

The image shows a thank you email template. At the top, there is a blue header with the text "Thank you" in a white, cursive font. Below this, the text reads "Thanks Leila!" and "You're our newest regular giver." The main body of the email explains that the donor has started a regular donation of \$26.25 every 1 month to support "Blaze Your Trail". It provides instructions on how to manage the donation. A red-bordered box highlights a specific paragraph: "As a regular donor, we won't send you donation receipts every month but you WILL receive a tax statement in July of each year showing all donations made in the previous financial year." Below this box is a green button labeled "Manage my Donations". A horizontal line separates this section from the "Regular Donation Details" section. This section includes the organization's name "Olivia's Place ABN 53 439 178 710", a reference number "12345", and a date "03/12/2020". A table follows, listing the donation details: "Blaze Your Trail Demo" for \$25.00, "Contribution to processing costs" for 1.25, and a frequency of "Every 1 month". The total amount is listed as \$26.25. At the bottom, it states "Donation Received from: Leila de Lima" with an email address "harveymilk@example.com".

Thank you

Thanks Leila!

You're our newest regular giver.

You've started a donation of \$26.25 every 1 month to support Blaze Your Trail. You can manage your donation at any time from your account, or by clicking the button below.

As a regular donor, we won't send you donation receipts every month but you WILL receive a tax statement in July of each year showing all donations made in the previous financial year.

[Manage my Donations](#)

Regular Donation Details

Olivia's Place ABN 53 439 178 710

Reference: 12345

Date: 03/12/2020

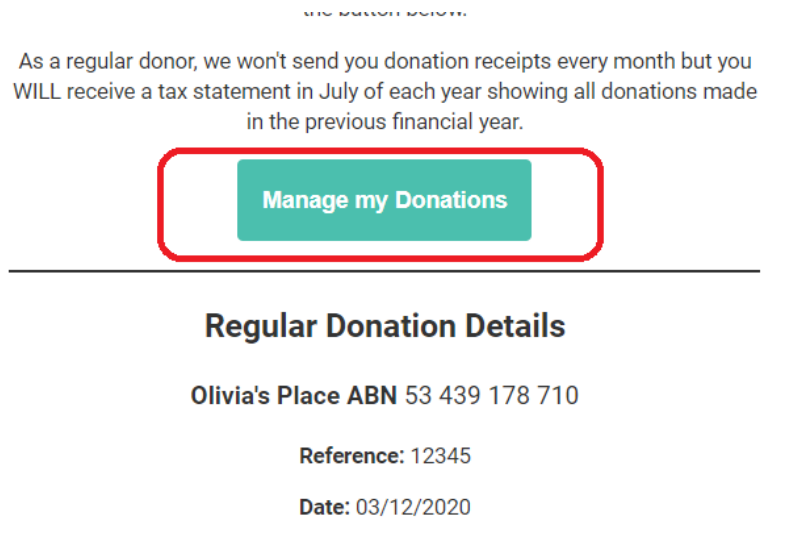
| | |
|-----------------------------------|----------------|
| Donation to Blaze Your Trail Demo | \$25.00 |
| Contribution to processing costs | 1.25 |
| Frequency | Every 1 month |
| Total | \$26.25 |

Donation Received from:

Leila de Lima

harveymilk@example.com

Remember to include the button for **Manage my Donations**. You can update the colour of this button (and all messages buttons) to be the branding color:



Here is the content for the table:

Edit this block

Base table alignment
Left

Edit table

| | |
|---|---|
| Donation to {{campaign.name}} | {{money donation.amount currency=donation.currency}} |
| Contribution to processing costs | {{donation.fee}} |
| Frequency | Every {{subscription.schedule}} |
| | |
| Total | {{money donation.total currency=donation.currency}} |

Delete
Cancel
Save

| | |
|---|---|
| Donation to {{campaign.name}} | {{money donation.amount currency=donation.currency}} |
|---|---|

| | |
|----------------------------------|---|
| Contribution to processing costs | {{donation.fee}} |
| Frequency | Every {{subscription.schedule}} |
| | |
| Total | {{money donation.total currency=donation.currency}} > |

If you are **KEEPING** the Regular Donation Receipts **on** every month, make sure that you update the Subject Line in the Message (as well as the content), because out of the box it says, 'Thanks for becoming a regular donor'. The subject line should instead say something like, 'Receipt for your regular donation to Charity Name'.

Step 2
Set your sender and subject line

Sender Name
Blaze Your Trail

Sender Email
jessica@blazeyourtrail.org

Subject
Thanks for becoming a regular donor!

Save Apply Sender to All Emails Next Step Done

Step 2
Set your sender and subject line

Sender Name
Blaze Your Trail

Sender Email
jessica@blazeyourtrail.org

Subject
Your receipt for your regular donation to Blaze Your Trail

Save Apply Sender to All Emails Next Step Done

Redirects


Redirects are used when a Campaign or Appeal is complete and you want to redirect a donor who uses the campaign's link to make a donation, i.e. your Christmas Appeal is complete but a donor has clicked that link in their email to

make a donation so you redirect them to your current / everyday appeal. For this to work, the Christmas Appeal (or any redirected appeal) **must** remain Active and NOT Archived. If you Archive the Campaign, the redirect won't work and the donor will instead be taken to the Raisely Login screen.

Redirects

Your Redirects

Create permanent redirects from old pages to new pages on your Raisely website.

/thankyou > /thankyou 

Add a Redirect

Redirect From

Redirect To

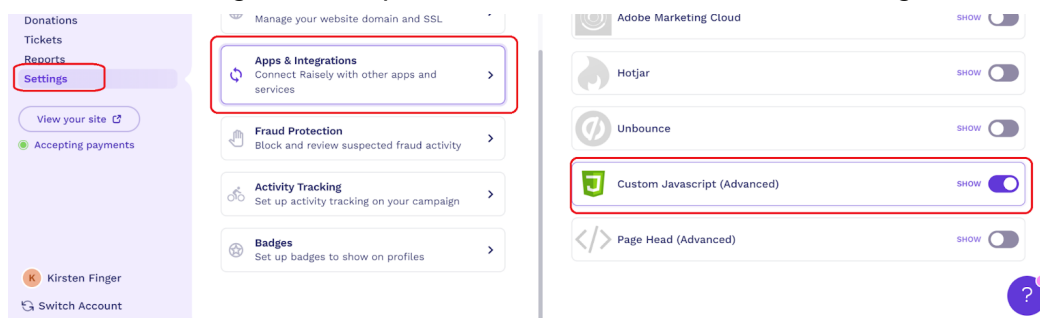
Custom Path

[Add Redirect](#)


Before setting up a redirect we must customise the 'Thank you' page under pages.

Redirects using JavaScript


To set a redirect using JavaScript, follow the below to access the right area:



When you click on Custom JavaScript (Advanced) it will open and give you the option to instruct the URL to be redirected elsewhere.

 Custom Javascript (Advanced) HIDE

Run custom JavaScript on different events throughout your Raisely website.

 **Subscribing to events**
You can use JavaScript to hook into events like page views, donations and sign-ups across your Raisely website. [View the available events.](#)

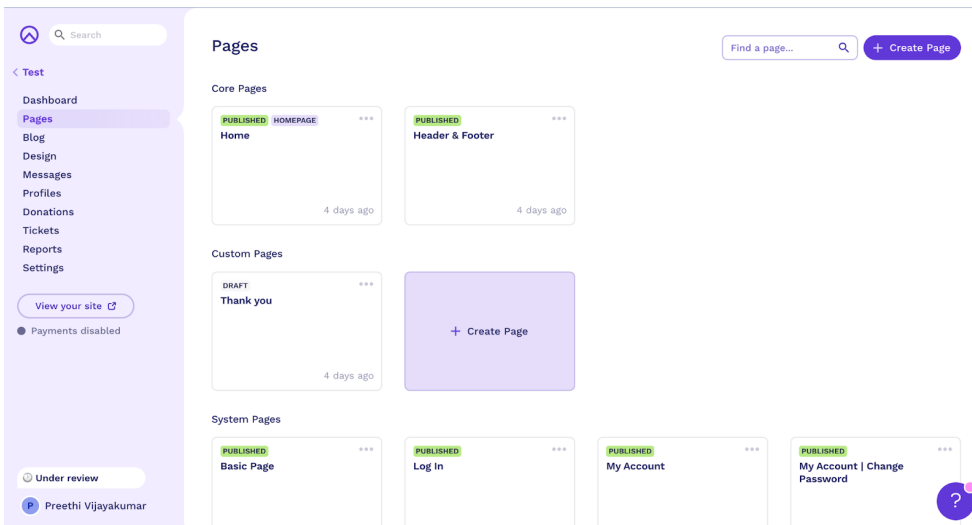
```
1 const current_path = window.location.pathname; if (current_path === "/")  
  {window.location.replace("https://yournewappeal.raisely.com/");}
```

Here is the code:

```
const current_path = window.location.pathname; if (current_path ===  
"/"){window.location.replace("https://yournewappeal.raisely.com/");}
```

Customise the Thank you page

- In the campaign menu, click on pages and click on Create page.



- Provide a title for the page.

New Page

Page Title ?

Internal Page Title

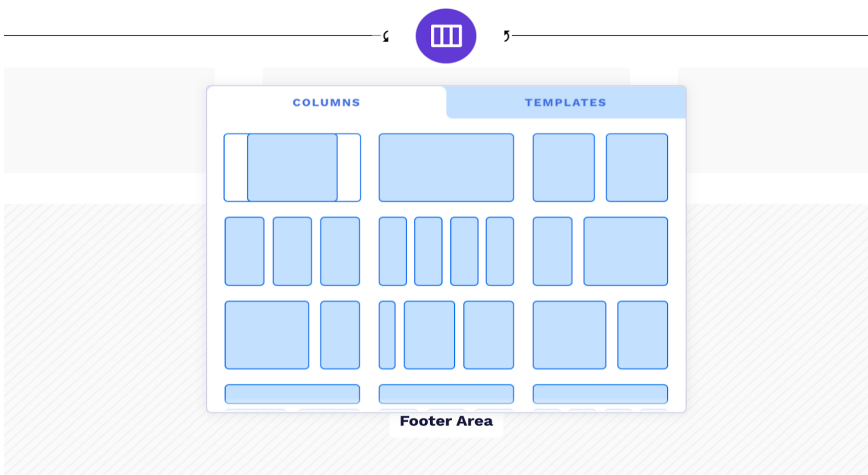
Path ?

Clone page from

None v

Cancel
Create Page

- Open the page and customise the page.



- After you are satisfied with the page, save it and publish it.
- Once published this can be used in the redirect above.

Integration

Settings

- Campaign Settings**
Customise your campaign name and goal
- Payments & Receipts**
Set up your payment gateways and receipts
- Donation Form**
Customise your donation form and regular giving
- Signup Form**
Manage the custom fields for your campaign
- Menu**
Add or remove pages from the site menu
- Languages**
Add languages to your multilingual campaign
- Social Media**
Control how your campaign looks on social media
- Facebook Integrations**
Set up and manage your Facebook Integrations
- Matched Giving**
Set up matched giving for your donations
- API & Webhooks**
Find your API keys and add webhooks
- Redirects**
Redirect pages in your Raisely site
- Domains**
Manage your website domain and SSL
- Apps & Integrations**
Connect Raisely with other apps and services
- Fraud Protection**
Block and review suspected fraud activity

API & Webhooks

API Keys
Use these credentials to access the Raisely API.

API Documentation
Using the Raisely API, references and authentication.

API Key
raisely-sk-194c5c04df5c55f81231ee15472b1ff2

Campaign UUID
3a75dd20-51d9-11ee-ad64-b74a402935f8

Campaign Profile UUID
3a77d8f0-51d9-11ee-844e-fde7857832c3

[Reset Private Key](#)

Webhooks
Notify your application of events in Raisely in realtime.

Webhook Documentation
Understanding the events Raisely sends to your webhook.

Add a Webhook

URL
Webhook URL from the Integrating platform

Shared Secret

Events

[Add Webhook](#)

These keys must be copied and pasted inside the appropriate fields inside the Integrating Platform (Zapier or Movedata for example)

Events are the triggers for the webhook. Example: Donation Succeeded, Donation Created, Subscription Updated etc.

Depending on the Integration, MoveData or Zapier, the events will be different

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