

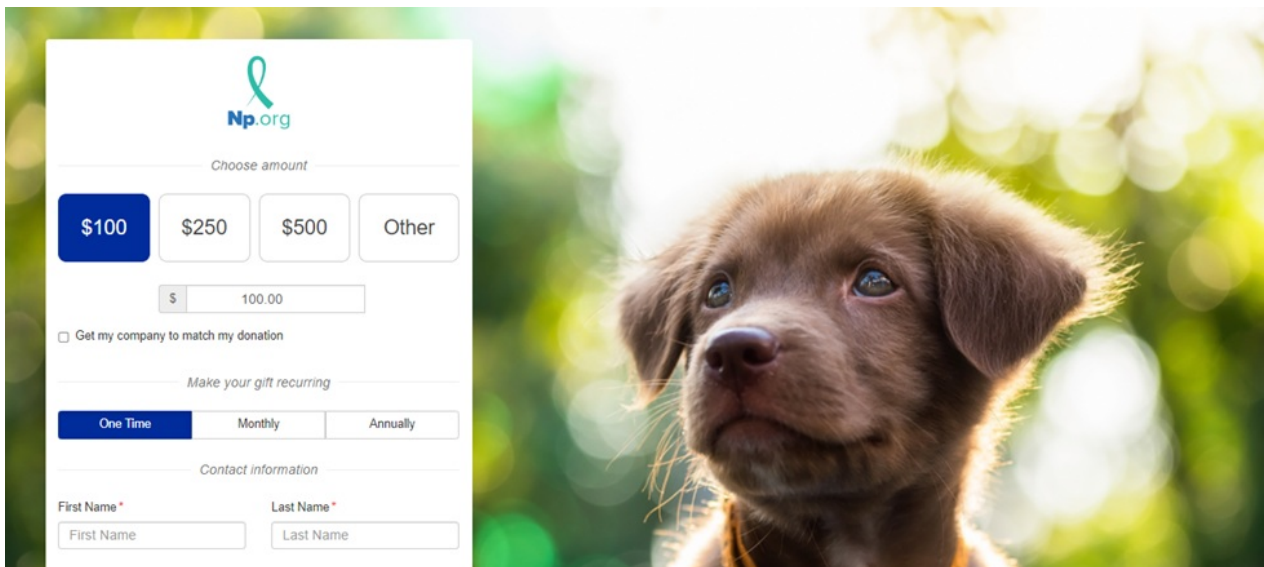
Text to Donate Activity Design

Last Modified on 09/25/2023 9:49 am PDT

The Text-to-Donate activity is essentially the core activity in GiveSmart Fundraise. Once you design a Text-to-Donate activity, you can design just about anything.

The Text-to-Donate activity is a Donation form that can be accessed via a web link (including a short link - usable anywhere, but specifically for mediums, like Twitter where every character is premium), a QR code that you can add to your marketing materials, including physical mail, and through texting.

The Text-to-Donate activity makes giving as easy as possible.



The image shows a mobile donation form for Np.org. The form is overlaid on a background image of a brown puppy. The form includes the following sections:

- Choose amount:** Buttons for \$100, \$250, \$500, and Other. A text input field shows \$ 100.00.
- Get my company to match my donation
- Make your gift recurring:** Radio buttons for One Time (selected), Monthly, and Annually.
- Contact information:** Input fields for First Name* and Last Name*.

Individuals who text your keyword immediately receive a text message reply with a secure link to a PCI-compliant mobile donation page. With just a few clicks, individuals can make a one-time or recurring gift to your organization. Individuals who do not complete their donation form receive TCPA-compliant reminder texts to encourage and optimize fulfillment.

Initial Text:

Thanks for supporting
GSFAcademy.

Click here to complete:
<https://igfn.us/l/2ly0os>

Msg&data rates may apply. 4
msgs/mo. Text HELP for help, Text
STOP to end

Following Day:

Thank you so much for initiating a gift yesterday! To complete your gift now, click <http://igfn.us/f/2huu7j>.

Text STOP to unsubscribe

4 Days Later:

We are so grateful for your support. Your gift is not yet complete. Click here to complete now: <http://igfn.us/f/2huu7j>.

Text STOP to unsubscribe

8 Days Later:

We noticed that you haven't had a chance to complete your gift yet. If you'd like to fulfill click here <http://igfn.us/f/2huu7j>.

Text STOP to unsubscribe

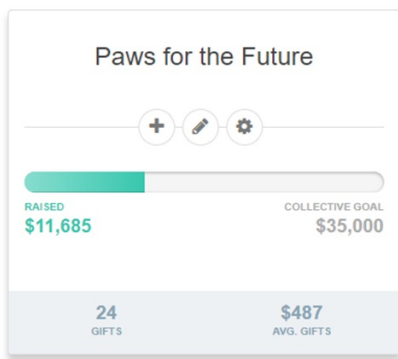
Text-to-Donate Quick Start Video

Watch this video to get started or scroll down for the written version of the process:

CREATE A TEXT-TO-DONATE ACTIVITY





To create a Text-to-Donate activity, you need to have a Campaign already created. If you do not have a Campaign or want to add this activity to a new one, click on New Campaign to create one and follow the process of creating a campaign, [as outlined here](#).

Then create a new activity from the New Activity button in the upper right corner of the dashboard or hover your mouse over the Campaign Tile and click on the Plus icon.




In the pop-up, click on Texting keyword and then Text-to-Donate.

What kind of activity do you want to create?

- 
Online form
 Collect donations, sell tickets, recruit volunteers, and more
- 
Texting keyword
 Capture texted donations and new subscribers
- 
Crowdfunding/Peer-to-Peer
 Recruit teams and individuals to fundraise
- 
Update to Event Pages
 Event Pages are now Activity Landing Pages. When you create an online form, an Activity Landing Page will be available by default in the left navigation of the Activity page.

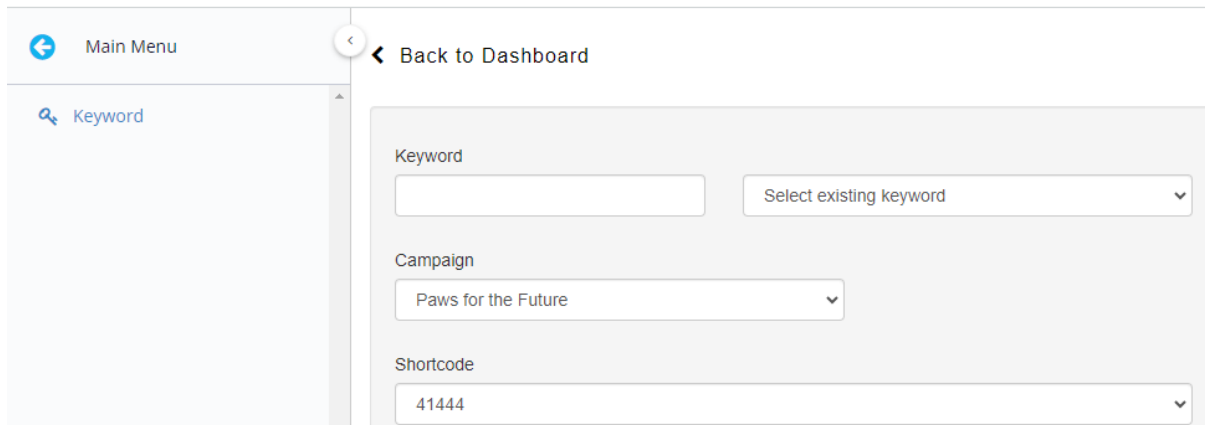


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Texting keyword
 Capture texted donations and new subscribers

[Text-to-Donate](#)

[Text-to-Subscribe](#)

SET UP YOUR KEYWORD



← Main Menu

← Back to Dashboard

Keyword

Keyword

Select existing keyword

Campaign

Paws for the Future

Shortcode

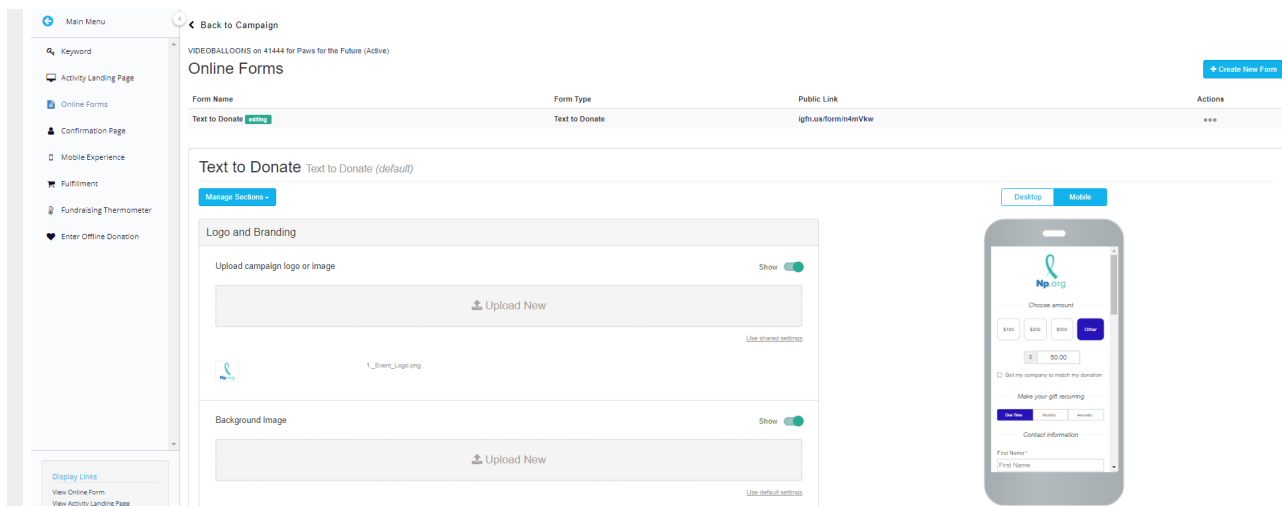
41444

1. Either type in a new **Keyword**, or select an existing one to reset and start from scratch.
 - For more information about reusing, moving, or reassigning a keyword, [click here](#).
2. Select a **Campaign**.
 - If you create your activity from the Campaign Tile or within the campaign, it automatically selects the campaign for you.
3. Choose what **Shortcode** you would like to use: 41444 or 91999.
 - The shortcode is the phone number that donors will text the keyword to. We have two options to choose from and since all GiveSmart Fundraise customers share the same two options, keywords can be limited. This allows for two of the same keyword to exist, just on separate shortcodes.
4. Click Save to create your activity and start it.

Detailed Keyword Info

CREATE YOUR ONLINE (Gift/Donation) FORM

The Online Form is where donors will be directed when placing donations. This is where you will choose what information you collect and how the general donor experience will look. As you edit the form, you will see a mobile preview to the right of the editable sections. You can also preview the desktop and tablet views.



Logo and Branding

The Logo and Branding section changes the look of the form by adding a logo or background image specific to this activity or selecting a color for the button or background by either entering a hex color code or selecting a color in the circle. You can also move the placement of the form on the webpage.

[Detailed Logo and Branding Info](#)

Suggested Amounts

The Suggested Amounts section allows you to create a Section Heading, choose three different donation quantities, and set a default amount to provide supporters with various choices for their donations.

Tip: We recommend that the middle amount be slightly higher than the average online gif and the Default Donation Amount be a quantity somewhere in the middle of the suggested amounts.

[Detailed Suggested Amounts Info](#)

Matching Donations

The Matching Donations section allows you to turn on or off the option for donors to have their company give a matching gift if they are a participating organization.

[Detailed Matching Donations Info](#)

Recurring Donations

The Recurring Donations section gives donors the option to set up their donation as a recurring gift. You can choose if you would like to turn this feature on or off, the payment type (Ongoing, Fixed Term, or Pay Over Time) to cover different giving strategies, the frequency, and the default frequency. The form has the capability of four choices, and there are five options to choose from: One Time, Weekly, Monthly, Quarterly, and Annually.

Usually, you want to leave Default Frequency as One Time, unless everything about this activity is designed with a recurring donation in mind.

Lastly, your one-time donors can be prompted to change their donation to recurring with the Encourage Recurring Donations options.

Detailed Recurring Donations Info

Contact Information

The Contact Information section is where you collect information about the donor, such as their first and last name, mobile number, email address, and address. We highly recommend that you select one or more methods of communication as a required item so you have at least one way to reach out to your supporters in the future.

Making the email a required item will ensure that donors receive a copy of their receipt for their donation.

Detailed Contact Information Info

Payment Information

The Payment Information section gives you options for the payment transaction. If you have [PayPal](#) connected to your account, then you can choose a default payment method. You can also choose to give donors the option to cover the payment processing fee and/or decide if they would like to be anonymous on public-facing pages, such as the [Fundraising Thermometer](#) and the [Activity Landing Page](#).

If the only payment method you have on your account is for credit or debit cards, then the section is listed as **Card Information** instead of Payment Information.

Detailed Payment Information Info

Promotional Codes

The Promotional Codes section isn't used on a Donation page. This provides discounts for things like Ticketing or any other payment form.

Detailed Payment Information Info

Footer Message

The Footer Message section is a text box to add any last items before the donor submits their donation. It is not often used, which is why it is hidden by default. Remember to switch it to **Show** if you are using the section.

[Detailed Footer Info](#)

Form Submit

The Form Submit section is the last area to customize the form. The main function is to show the total donation amount and the SUBMIT button. You can change the Button Text to make it more personal.

[Detailed Form Submit Info](#)

Receipts and Notifications

The Receipts and Notifications section allows you to control automated communication with your constituents. You can choose to use both SMS (texting) and/or Email. Both types of notifications are enabled by default.

[Detailed Receipts and Notifications Info](#)

Embed Code

Use the code in the Embed Code section to add the form to a secure section on your website.

If you do not have a secure webpage and are not looking for one at this time, you can simply link the form to Donate button on your site.

[Detailed Embed Code Info](#)

PERSONALIZE THE CONFIRMATION PAGE

The Confirmation Page thanks the donors for their donations and provides different calls to action for them. There are two sections on the Confirmation Page:

- **Content**
 - This is where you can thank your supporters by name, let them know their payment was billed, and provide text, images and/or videos.
- **Actions**
 - Here, you can add buttons to direct your donors to other pages, such as a Volunteer Signup activity or your website. You can also provide ways for them to follow you on different social media platforms and ask them to sign up to receive text or email messages from your organization.

[Detailed Confirmation Page Info](#)

DECIDE THE MOBILE EXPERIENCE

This is where you can choose which page your guests will see when they text in the Keyword to the shortcode. The two options are either the Activity Landing Page or the Text-to-Donate site.

The screenshot shows a configuration page for the keyword "VIDEOBALLOONS" on shortcode "41444" for "Paws for the Future (Active)". The page title is "Mobile Experience".

Your Organization Short Name: GSFAcademy

Choose Keyword Reply:

- Activity Landing Page - Thanks for supporting GSFAcademy. Click here to complete: <https://igfn.us/>
- Text to Donatre - Thanks for supporting GSFAcademy. Click here to complete: <https://igfn.us/exam>

Three mobile phone screens illustrate the user experience:

- A text message from "VIDEOBALLOONS" thanking the user for supporting GSFAcademy and providing a link to complete the donation: <https://igfn.us/exam>. It also includes a note about applicable rates and a "Text HELP" option.
- A donation form on the Np.org website with fields for "Choose amount" (options: \$100, \$250, \$500, Other), a text input for the amount (set to \$ 50.00), a checkbox for "Get my company to match my donation", and a "Make your gift recurring" section with "New Rec", "Monthly", and "Annually" options.
- A "Thank You" confirmation screen with the user's first name, a note that their card ending in "**** 41" has been billed for the amount, and a message encouraging further support through social media or a mailing list. Buttons for "Volunteer" and "Call to Action" are visible.

On the left, a "Main Menu" sidebar includes options like Keyword, Activity Landing Page, Online Forms, Confirmation Page, Mobile Experience (selected), Fulfillment, Fundraising Thermometer, and Enter Offline Donation. Below the menu is a "Display Links" section with links to view online forms, activity landing pages, fundraising thermometers, and Facebook share/debug views. A shareable link is provided: igfn.us/f/2tmc/n.

[Detailed Mobile Experience Info](#)

SET FULFILLMENT MESSAGES

Those who texted the Keyword but have not completed their donation will receive up to three reminders to complete their gift. You can select which **Fulfillment Messages** you want for this keyword by checking or unchecking each option and clicking **Save**.

← Main Menu

← Back to Campaign

📄 Online Forms

👤 Confirmation Page

📱 Mobile Experience

📧 Fulfillment

🌡️ Fundraising Thermometer

❤️ Enter Offline Donation

VIDEOBALLOONS on 41444 for Paws for the Future (Active)

Fulfillment

Send this text reminder to my donors if they have not fulfilled their pledge after 1 day.

Thank you so much for initiating a gift yesterday! To complete your gift now, click <link to donation>.

Send this text reminder to my donors if they have not fulfilled their pledge after 4 days.

We are so grateful for your support. Your gift is not yet complete. Click here to complete now: <link to donation>.

Send this text reminder to my donors if they have not fulfilled their pledge after 8 days.

We noticed that you haven't had a chance to complete your gift yet. If you'd like to fulfill click here <link to donation>.



We use multiple points of fulfillment data to determine the content & frequency of our text reminders.

Display Links

- View Online Form
- View Activity Landing Page
- View Fundraising Thermometer
- Facebook Share View
- Facebook Debug View

Detailed Fulfillment Info

DESIGN THE FUNDRAISING THERMOMETER

Your organization can easily project a real-time thermometer during live events to build and maintain momentum during the giving portion of the event. Mobile pledges appear live on-screen as the thermometer rises toward the goal.

When you first click on Fundraising Thermometer in the left side menu, you will see your blank default thermometer like this one.

The screenshot displays the 'Fundraising Thermometer' interface. At the top, there are four tabs: 'Thermometer', 'Welcome', 'Instructions', and 'Thank You'. The main area shows a thermometer with a blue liquid level, a goal of '\$0 RAISED', and a background of hands holding sparklers. A customization panel on the right includes sections for 'Header' (with options for 'Display Header', 'Header Text', 'Header Text Color', and 'Header Background Color') and 'Thermometer' (with 'Display Options' and 'Donor Wall'). A left sidebar contains navigation options like 'Activity Landing Page', 'Online Forms', 'Confirmation Page', 'Mobile Experience', 'Fulfillment', 'Fundraising Thermometer', and 'Enter Offline Donation'. A 'Display Links' section is also present at the bottom left.

To learn how to design and customize the thermometer click the link below.

[Detailed Fundraising Thermometer Info](#)

Viewing the Live Fundraising Thermometer

To view the live version of the thermometer, click **View Fundraising Thermometer** in the left menu below **Display Links** and it will open in a new window.

To display the thermometer at an event, double-click anywhere on the webpage to enlarge it to full screen.

The Fundraising Thermometer During an Event

Once donors text your keyword, a space, the donation amount, another space, and their name – their donation will appear on the live thermometer and they will receive a text to complete the donation. The link in the text will automatically redirect them to the donation page. On the donation page, the amount pledged appears as the donation amount.

All participants that do not fulfill their pledge receive reminder texts. These reminders dramatically increase pledge fulfillment.