

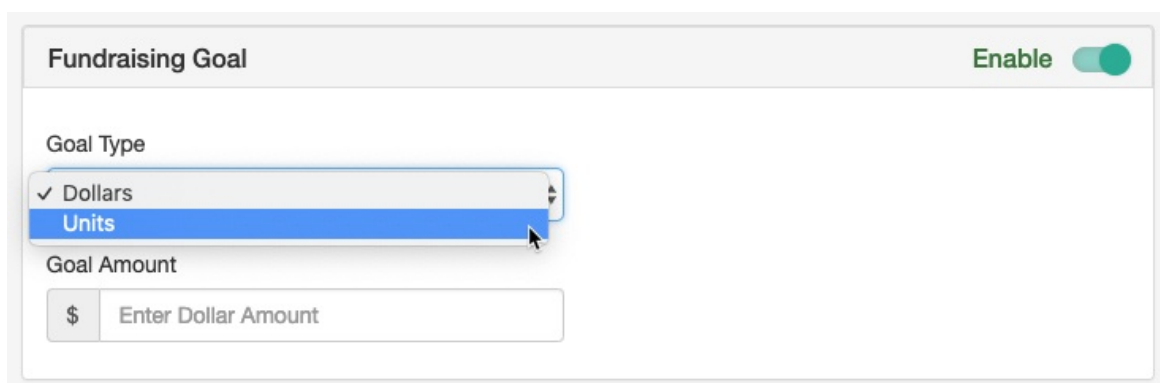
Units Based Goals

Last Modified on 05/20/2022 6:00 pm PDT

You have a goal, but it isn't for dollars. You want to make it for some kind of unit, whether it be pies or backpacks or blankets or books. With the Crowdfunding and Peer-to-Peer Fundraising Activity, you can choose to count those items (units) instead of just dollar amounts.

Change the Fundraising Goal Type

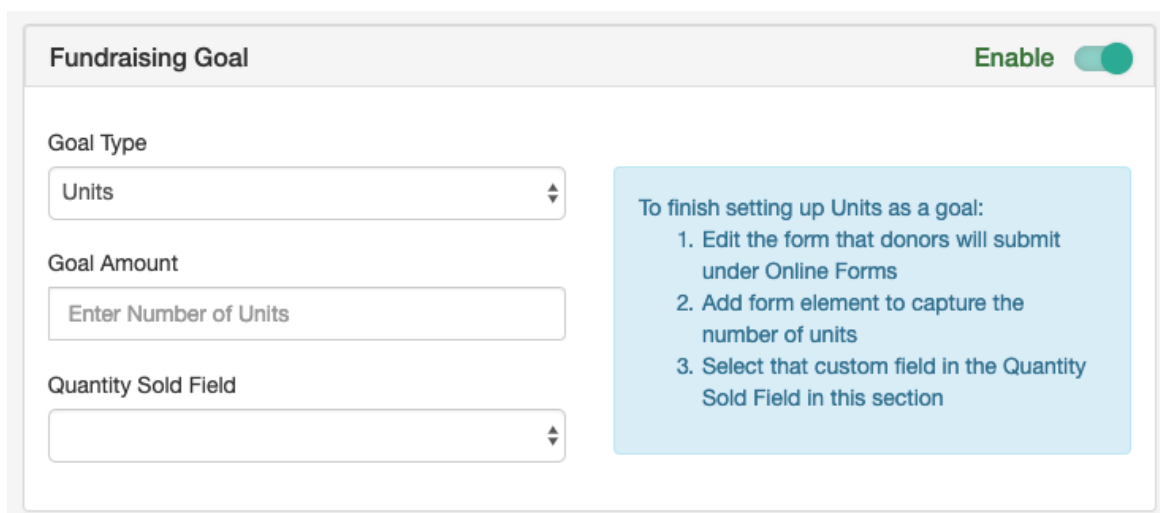
To count units, create a new Crowdfunding and Peer-to-Peer Fundraising activity and in the Fundraising Goal section of the Setup Keyword step, you can change the Goal Type from Dollars to Units.



The screenshot shows the 'Fundraising Goal' section of a setup form. At the top right, there is an 'Enable' toggle switch that is turned on. Below this, the 'Goal Type' dropdown menu is open, showing 'Dollars' with a checkmark and 'Units' selected. Below the dropdown is a 'Goal Amount' field with a '\$' icon and the placeholder text 'Enter Dollar Amount'.

When you do this, instead of a Dollar goal, you will be presented with a Goal Amount (Number of Units you wish to sell) and a Quantity Sold Field.

- Enter the number of units you wish to sell.
- *You will not have any choices for the Quantity Sold Field yet, you will have to come back after other settings have been applied.*
- Complete the rest of the Activity's Keyword Setup as normal and Save.

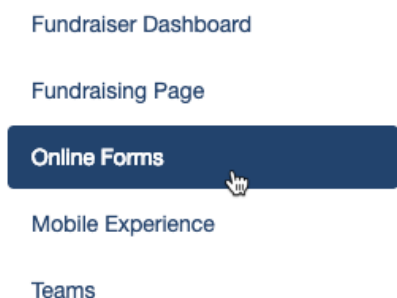


The screenshot shows the 'Fundraising Goal' section of a setup form. At the top right, there is an 'Enable' toggle switch that is turned on. Below this, the 'Goal Type' dropdown menu is set to 'Units'. Below the dropdown is a 'Goal Amount' field with the placeholder text 'Enter Number of Units'. Below that is a 'Quantity Sold Field' dropdown menu. To the right of these fields is a light blue callout box with the following text: 'To finish setting up Units as a goal: 1. Edit the form that donors will submit under Online Forms 2. Add form element to capture the number of units 3. Select that custom field in the Quantity Sold Field in this section'.

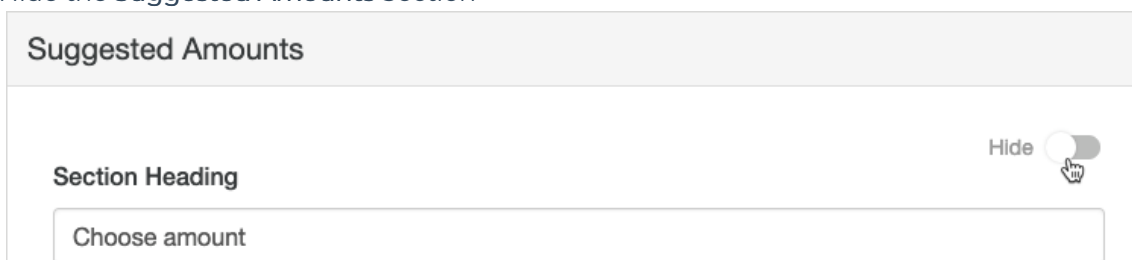
Crowdfunding and Peer-to-Peer Fundraising with Units

Many variations of this process can be used. This shows one method with the key elements. Feel free to experiment and personalize your own forms to suit your needs.

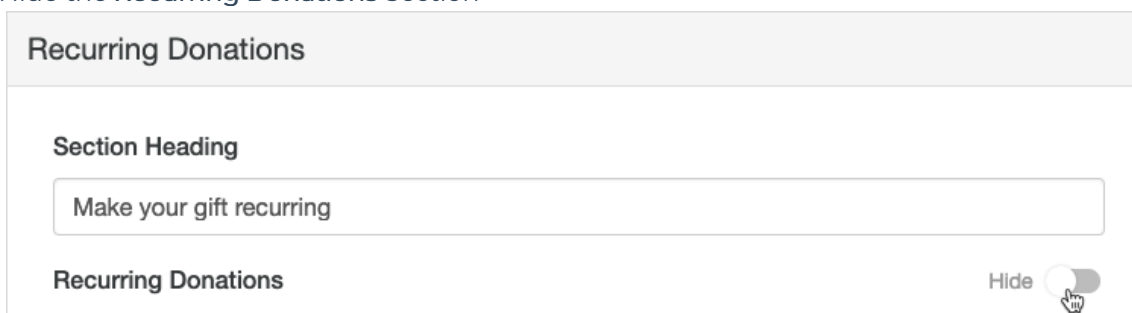
- Go to the Online Forms section in your Activity



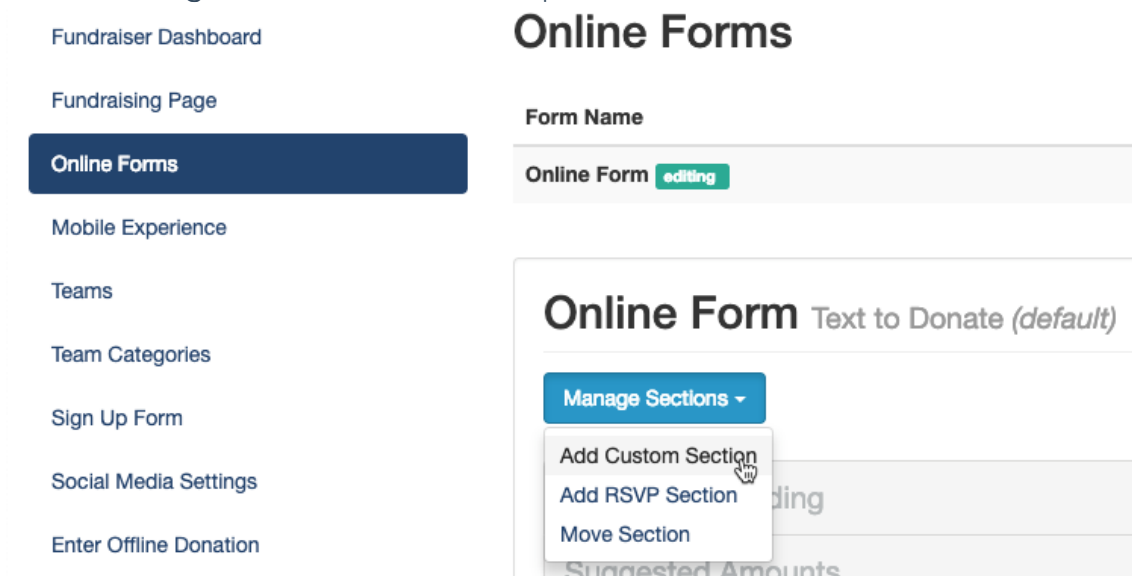
- Set up the Logo and Branding for your Donation Form
- Hide the Suggested Amounts Section



- Hide the Recurring Donations Section



- Adjust the Contact Information as needed
- Adjust the Payment Information as needed
- Click the Manage Sections button at the top and select Add Custom Section



- - Name the Section something appropriate

- Move the Section to the top of the list of sections

Add Custom Section ✕

New Section Title *

Position Your Section

<Your New Section>

Suggested Amounts

Recurring Donations

Contact Information

Payment Information

Footer Message

Form Submit

- If you don't want the form to have the title of your section, open the section and delete or rename the **Section Heading**.

Select Pies

Section Heading 🗑️

- **Add Design Elements:** This is where you can provide information, pictures or video to describe the cost of each item.
 - Click on **Add Form Element** and personalize your form with desired **Design Elements**

Select Pies

Section Heading 🗑️

Select Pies

Suggested Amounts

Recurring Donations

Contact Information

Payment Information

Footer Message

Form Submit

Embed Code

+ Add Form Element ▾

Collect Information

- 👁️ Agree to Terms
- 📊 Calculated
- ☑️ Checkbox
- 📅 Date
- 📄 Drop-Down
- 👁️ Hidden
- ☰ Long Answer
- 🔒 Password
- Short Answer

Design Form

- 🖼️ Image
- A Text 👤
- 📺 Video

- Create a **Hidden** form element for the cost of each unit.
 - *Note: By putting the costs of each unit as a Hidden form element makes the Calculation process much easier*

Add Form Element - Hidden ✕

Reporting Label ⓘ

Cherry Pie Cost

Hidden Field Value

20

Number? This will make the entry calculable

Cancel Save

- Click **Add Form Element** and select **Hidden**.
- Choose a **Reporting Label** - this will be the Name of the unit, like Raspberry Pie Cost vs. Lemon Meringue Pie Cost, etc.
- Choose the **Hidden Field Value** - this is the cost per unit sold. This means if a supporter buys five blankets at \$10 each, it will be registered on the display as five blankets, but the total *price* would be \$50.
- *Make sure to put a checkmark in Number so this can be calculated.*

- **Save** the Unit Cost Hidden item
- Repeat for any other types of units you are using.
- Add a Form Element to allow your Supporters to select how many of the items they wish to buy. This could be in the form of a Drop-Down or a Short Answer. We'll use Short Answer in this guide so your donors can select any number they like.

x

Add Form Element - Short Answer

Display Label [?](#)

How many Cherry Pies do you wish to buy?

Reporting Label: Cherry Pies [edit](#) [?](#)

Number? This will make the entry calculable

Cancel Save

- Write a **Display Label** - This will be what is shown on the form itself.
- Create a **Reporting Label** - This will be how you can retrieve the number for reporting and for the actual counting of the units. By default, it will use the Display Label, but you can change this to anything you like.
- ***Make sure to put a checkmark in Number so this can be calculated.***
- Repeat for any other types of units you are using.
- Add a **Calculated** Form Element to determine the final number of Units.
 - *Note: If you are only selling one type of unit, like Books, then you can skip this step and go to calculating the total cost.*
 - Provide a **Reporting Label** for the *Total Units*
 - If you wish to show the total number of units on the donation form, you can select **Show Results on Form**.
 - Since this is just adding the number of units together, you don't need to check in the other two options
 - Select the first unit from the Drop-Down
 - Click the plus (+) symbol
 - Select the next unit, and add all the Units by name. Your formula should appear in the grey box.

Add Form Element - Calculated

Reporting Label ⓘ

Total Pies

- Show Results on Form - *appears below calculated field*
- Show Results as Amount - *display result in \$.xx format*
- Make this calculation the final donation amount - *this will override the default donation count and will remove all suggested donation amounts*

<Cherry Pies>+<Apple Pies>+<Raspberry Pies>

Select an available numeric custom field to insert into calculation

Delete

+	-	*	/	()					
0	1	2	3	4	5	6	7	8	9	.

Cancel

Save

- Add a **Calculated** Form Element to determine the *final cost* of all the units added together.
 - With this Calculated element, you will want to put checkmarks in:
 - **Show Results as Amount**, since this is the total price
 - **Make this calculation the final donation amount**, since this will add the number of pies and their costs to provide the amount your donor will pay.
 - Select the first Unit amount (from the short answer or drop down you created) from the drop-down
 - Click on the multiply (*) button
 - Select the first Unit's cost (from your Hidden form element)
 - If you have more than one unit, click on the plus (+) and add the next unit amount multiplied by that unit's cost.

Add Form Element - Calculated

Reporting Label ⓘ

Total Pie Cost

- Show Results on Form - *appears below calculated field*
- Show Results as Amount - *display result in \$x.xx format*
- Make this calculation the final donation amount - *this will override the default donation count and will remove all suggested donation amounts*

<Cherry Pies>*<Cherry Pie Cost>+<Apple Pies>*<Apple Pie Cost>+<Raspberry Pies>*

- Select an available numeric custom field to insert into calculation
 - Book Units
 - Cherry Pies
 - Apple Pies
 - Raspberry Pies
 - Book Cost
 - Cherry Pie Cost
 - Apple Pie Cost
 - Raspberry Pie Cost

Delete

Cancel

Save

Note: At this point, it is always wise to test the numbers to make absolutely sure your calculations are correct. Try several amounts and make sure the totals are accurate. If not, you may have made a mistake in the calculations.

- Change the wording of the **Form Submit** section, both the Section Heading and the Button Text to match what you are doing, such as the cost of pies sold, or Purchase Socks, etc.
 - Make sure to **Configure the Email Receipt** from the normal donation email to also reflect that your donors are purchasing these units.

Form Submit

Section Heading

Total Cost of Pies

Button Text

Buy your Pies!

14 character limit

14 / 14

Enter Units for the Activity

- Go back to your Activity Setup section by clicking on **Keyword** in the left column.

Fundraiser Dashboard

Fundraising Page

Online Forms

Mobile Experience

Teams

Team Categories

Sign Up Form

Social Media Settings

Enter Offline Donation

Keyword

- The **Quantity Sold Field** should now have the options from your added Form Elements to choose from.
 - Select the Total calculated Units (Calculated) if you had more than one type of unit to sell, or select the Collected information (either Text Box or Drop-Down) if you only had one type of unit. Make sure you are not selecting the calculated costs.

Fundraising Goal Enable

Goal Type
Units

Goal Amount
5000

Quantity Sold Field

- ✓ Online Form
 - Cherry Pie Cost (Hidden)
 - Apple Pie Cost (Hidden)
 - Raspberry Pie Cost (Hidden)
 - How many Cherry Pies do you wish to buy? (Textbox)
 - How many Apple Pies do you wish to buy? (Textbox)
 - How many Raspberry Pies do you wish to buy? (Textbox)
 - Total Pies (Calculated)**
 - Total Pie Cost (Calculated)

To finish setting up Units as a goal:
1. Edit the form that donors will submit under Online Forms
2. Add form element to capture the number of units
3. Select that custom field in the Quantity Sold Field in this section

- Make sure to scroll down and click **Save**.

Personalize your Crowdfunding and Peer-to-Peer Fundraising pages

At this point, you are ready to go with counting the units instead of counting a dollar amount. Follow the normal Crowdfunding and Peer-to-Peer Fundraising setup options to personalize your:

- Fundraising Page

- Other Online Forms
 - Sign Up Form
 - Social Media Settings
 - Team and Fundraiser Setting
-