

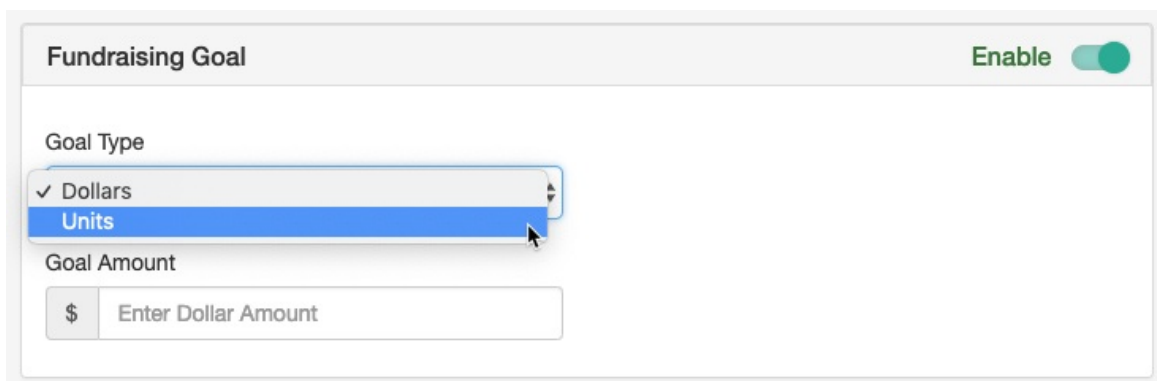
Units Based Goals

Last Modified on 09/07/2023 11:26 am PDT

You have a goal for something other than dollars. The goal can be some kind of unit. e.g. the number of backpacks, blankets, books, or brownies. With the Crowdfunding and Peer-to-Peer Fundraising Activity, you can choose to count items (units) instead of dollar amounts.

Change the Fundraising Goal Type

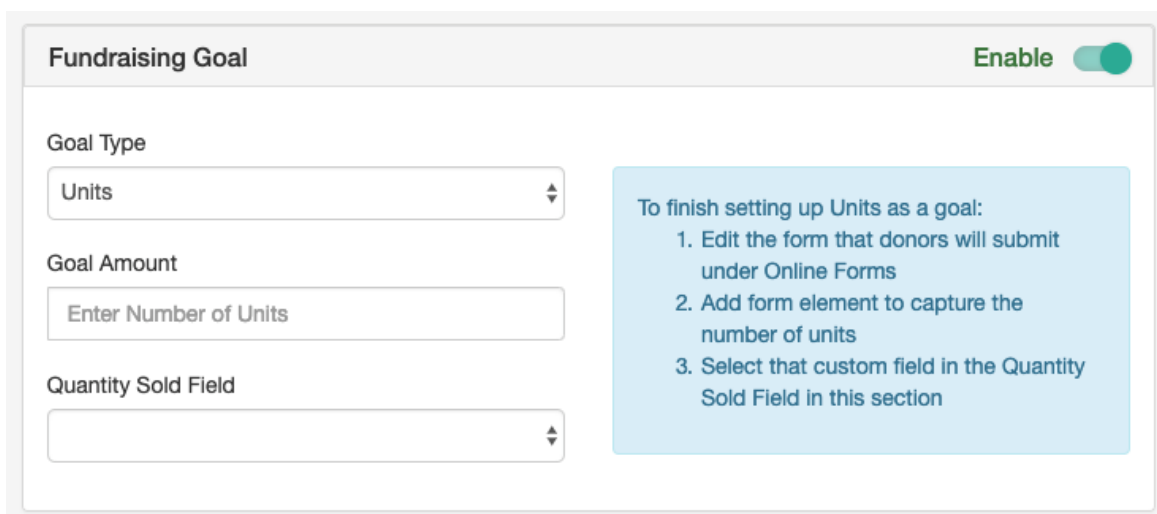
To count units, create a new **Crowdfunding and Peer-to-Peer Fundraising** activity, and in the **Fundraising Goal** section of the **Setup Keyword**, change the **Goal Type** from **Dollars** to **Units**.



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 dollar sign icon and the placeholder text 'Enter Dollar Amount'.

When you do this, 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**.

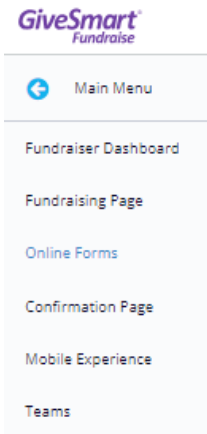


The screenshot shows the 'Fundraising Goal' section of a setup form. At the top right, there is an 'Enable' toggle switch that is turned on. Below this, the 'Goal Type' dropdown menu is set to 'Units'. Below it is a 'Goal Amount' field with the placeholder text 'Enter Number of Units'. Below that is 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'.

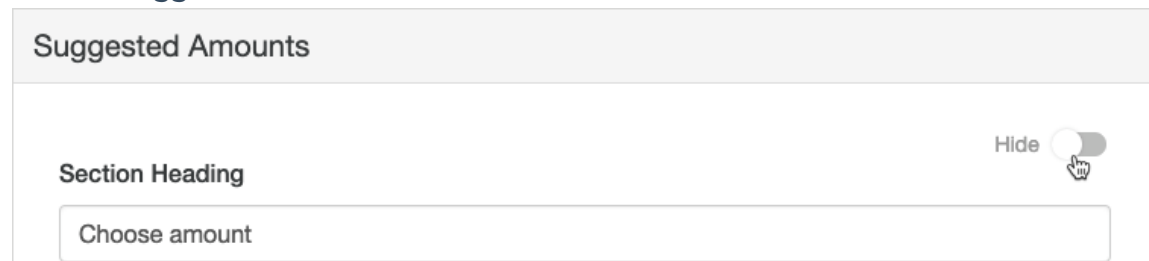
Crowdfunding and Peer-to-Peer Fundraising with Units

There are many variations of this process. The example below shows one method with the key elements. Feel free to experiment and personalize your own forms to suit your needs.

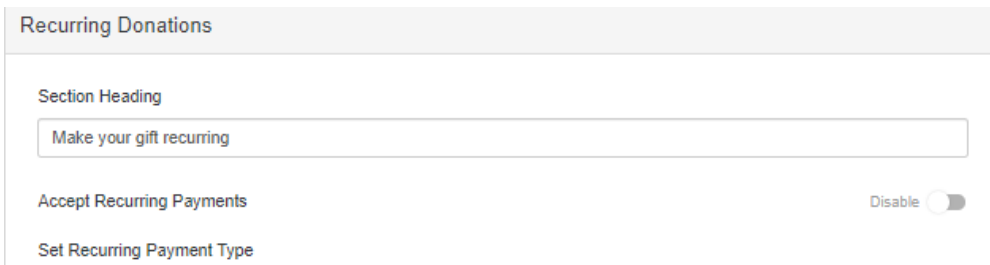
- Go to the **Online Forms** section in the Activity



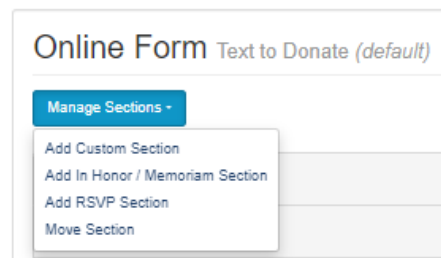
- Set up the **Logo and Branding** for the Donation Form
- Hide the **Suggested Amounts** Section



- Hide the **Recurring Donations** Section



- Adjust the **Contact & Card Information** sections as needed
- Click the **Manage Sections** button at the top and select **Add Custom Section**



Add Custom Section

New Section Title*

Position Your Section

Heart Cookie Order
Suggested Amounts
Recurring Donations
Contact Information
Card Information
Promotional Codes
Footer Message
Form Submit
<Your New Section>

↑ Up ↓ Down

Cancel Save

- Name the Section something appropriate
- Move the Section to the top of the list

Add Custom Section

New Section Title*

Select Pies

Position Your Section

<Your New Section>
Suggested Amounts
Recurring Donations
Contact Information
Payment Information
Footer Message
Form Submit

↑ Up ↓ Down

Cancel Save

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

Select Pies

Section Heading 🗑️

Select Pies I

[+ Add Form Element ▾](#)

- **Form Elements:** Where you can provide information, pictures, or video to describe each item.

- Click on **Add Form Element** at the bottom and personalize with the desired **Design Form** elements

Select Pies

Section Heading 🗑️

Select Pies

[+ Add Form Element ▾](#)

- Collect Information
 - 👁️ Agree to Terms
 - 📊 Calculated
 - ☑️ Checkbox
 - 📅 Date
 - 📄 Drop-Down
 - 👁️ Hidden
 - ☰ Long Answer
 - 🔒 Password
 - Short Answer
- Design Form
 - 🖼️ Image
 - 📄 Text 👤
 - 📺 Video

Suggested Amounts

Recurring Donations

Contact Information

Payment Information

Footer Message

Form Submit

Embed Code

- Create a **Hidden Form Element** for the cost of each unit.
 - Click **Add Form Element** and select **Hidden**.

Add Form Element - Hidden

Reporting Label ⓘ

Cherry Pie Cost

Hidden Field Value

20

Number? This will make the entry calculable

Cancel

Save

- Create a **Reporting Label**. This will be the name of the unit like Raspberry Pie Cost, Lemon Meringue Pie Cost, etc.
- Add the **Hidden Field Value**. This is the cost per unit sold. For example, if a supporter buys five lemon meringue pies at \$10 each, it will show on the display as five pies with a total *price* of \$50 (5 x \$10).
- **Make sure to put a checkmark next to Number so this can be calculated.**
- **Save** the Unit Cost Hidden item
- Repeat for any other types of units you are using.
- **Note:** *Putting the cost of each unit as a Hidden Form Element makes the Calculation process easier.*
- Add either a **Drop-Down** or **Short Answer Form Element** to allow supporters to choose how many of each item they wish to buy. Using the Drop-Down option allows you to predetermine which options they can choose from and Short Answer allows your donors to write any number they wish.

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 shown on the form itself.
- **Reporting Label** - This will be shown on reports for the actual counting of units.

- By default, it will use the Display Label, but you can change this by clicking edit.
 - **Make sure to put a checkmark next to Number so it can be calculated.**
 - Repeat for any other types of units.
- Add a **Calculated Form Element** to determine the total 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.

✕

Add Form Element - Calculated

Reporting Label ⓘ

Total Pies

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>+<Apple Pies>+<Raspberry Pies>

Select an available numeric custom field to insert into calculation

Delete

+

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(

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0

1

2

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9

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Cancel
Save

- Provide a **Reporting Label** for the *Total Units*
 - If you wish to show the total number of units on the donation form, select **Show Results on Form**.
 - This is only adding the total number of units, you don't need to check the other two options.
 - Select the first unit from the Drop-Down menu in the Select an available numeric custom field to insert into calculation section.
- Select an available numeric custom field to insert into calculation

Delete
- Click the plus (+) symbol
 - Select the next unit and then the (+) symbol and continue doing so until all the Units are used. Your formula will appear in the grey box.
- 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.

x

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*

$\langle \text{Cherry Pies} \rangle * \langle \text{Cherry Pie Cost} \rangle + \langle \text{Apple Pies} \rangle * \langle \text{Apple Pie Cost} \rangle + \langle \text{Raspberry Pies} \rangle *$

- ✓ 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

Note: At this point, it is always wise to test the numbers to make sure the calculations are correct. Try several amounts and make sure the totals are accurate. If not, there might be 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 socks purchased, etc.
 - Make sure to **Configure the Email Receipt** from the normal donation email to reflect that your donors are purchasing these units.

Form Submit

Section Heading

Total Cost of Pies

Button Text

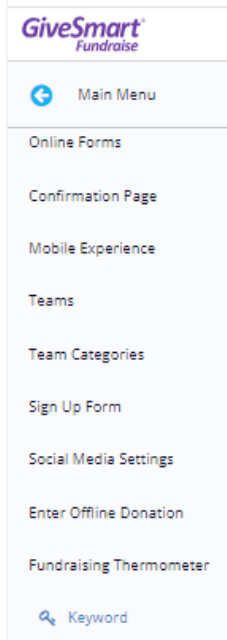
Buy your Pies!

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.



- 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

Goal Amount

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

U \$ [Icons]

- 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 the

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