How do I add a Check or Pledge Option to a Payment Form? (Pay Later)

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Considerations

(Read before continuing)

By default, GiveSmart Fundraise payment forms cannot be submitted without a monetary transaction being made. However, if you are looking to set up a payment form that allows someone to skip a monetary payment (credit card, PayPal, etc.) and instead submit their information to pay later, this article details the steps necessary to allow a payment form to record alternative payment methods such as cash, check, or a pledge.

For example, you are selling sponsorships and would like to give purchasers the option to mail a check. In this scenario, if the purchaser chooses the "check" payment method, they should not need to enter in their credit card details but should still be able to submit the form with their information.

> **Note:** GiveSmart Fundraise cannot directly process check, cash, or ACH payments, but our forms can help collect the necessary information for your organization to follow up to collect payments.
>
> See **here** for the current payment methods available through your forms. Payments accepted outside of GiveSmart Fundraise can be logged as an **Offline Donation** if needed.

In other words, this type of form setup can simply collect purchaser information noting their *intent* to give via check, pledge, etc., so that you can follow up with them how you see fit.

That being said, form submissions made without one of the **monetary payment methods listed here** will be logged as a **Non Payment** ($0) submission. Consider adding an **Offline Donation** if you wish to have these alternative form submissions reflect a monetary value on any public page or thermometer.

With all this in mind, it is important to include your mailing address, contact information, or additional instructions for how purchasers can submit their payment directly to your organization either on the form itself or in the receipt configuration.

> **TIP:** This is an advanced type of form setup and not suited for beginners. Consider reaching out to your Customer Success Manager to inquire about our smart setup or training services.

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1. Set Up Your Form

First, set up your payment form, whether that be a registration, sponsorship, ticketing, or other payment form type with all the elements you need. Click **here** for instructions on how to create a new form under an existing activity.

Important: If you're not using any Item or Ticket elements and would like to allow users to enter their own amount, create a **Short Answer** form element (e.g. "Enter Donation Amount") and check the "Number?" box to make it calculable.

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2. Set Up Your Payment Options

Determine the alternative payment options that you would like to offer through this form, such as check or pledge.

Create a **drop down** form element, where you can offer multiple payment options and even set conditional actions for other fields to appear. You may name this element something like "How would you like to pay?" or "Choose your Payment Method".

In this example, we will set up a drop down called "How would you like to pay?" with payment options for Credit Card and Check.

As shown below, the Option Label is what the donor will choose and see on the form. The **Option Value** on the right-hand column is the value that will help either show or hide the required credit card information.

The *Option Value* for your Drop Down options should be as follows:

- Credit Card: 1
- Check/alternative pay method: 0

By making the option value 1 for Credit Card, we can multiply the total amount by 1 and it will always be the same total (e.g. 100 x 1 = 100). By making the option value 0 for Check, when we multiply any value by it, it will always be 0 (e.g. 100 x 0 = 0). These values will be useful when we create the total calculation.

Important: Make sure to mark your Drop Down as required.

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3. Set Up Your Calculation

Next, we will need to setup a Calculated Element to tell the system how to calculate the final total.

Following the rules of Math (PEMDAS: Parenthesis, Exponents, Multiplication, Division, Addition, Subtraction), use parentheses to contain a calculated formula that adds up all of the form's monetary elements.

Using the example below, add all the payment elements together in parenthesis:

(Gold Sponsor + Silver Sponsor + Bronze Sponsor)

Next, you need to bring in your Payment Option element. Add an asterisk after the closed parathesis, and select your Payment Option element from the available fields. Your formula should look something like this:

> *(Golf Sponsor + Silver Sponsor + Bronze Sponsor)*How would you like to pay?*

That way, depending on which payment method they select, it will be multiplied by either 1 or 0 which will ultimately either show or hide the required credit card fields at the bottom of the form.

Prior to saving your calculated element, check the box for **"Make this calculation the final donation amount"**.

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4. Finalizing the Form

Enable Payment Section Visibility.

In the Payment/Card Information section of your form, check the Payment Section Visibility box to **Hide the Payment information section unless the Total Amount is greater than $0.00.**

This means that if the total amount calculates to $0, the required credit card information can be bypassed allowing for a non payment form submission.

> When **Payment Section Visibility** is selected, users who choose an alternative payment method will still be able to submit the form without entering in their credit card information.

Customizing the Receipt Email

Like with any GiveSmart Fundraise form, your constituents will receive an automated confirmation/receipt email. You may **customize this email** to include their payment method, specified amount, etc.

Since alternative payment methods such as Check, Cash, or Pledge will be considered Non Payment form submissions due to no monetary transaction taking place, you may consider removing the PDF tax receipt that is automatically attached to payment form submissions in order to prevent donors from receiving $0 tax receipts. More **here**.

Reporting for Form Submissions

Form submissions made without one of the **monetary payments method listed here** will be logged as a **Non Payment** submission in your reporting, with a Collected Amount and Donation Amount of $0. Consider adding an **Offline Donation** if you wish to have these alternative form submissions reflect a monetary value on any public pages or thermometer.

To include the results for those who selected the non payment options for check, pledge, etc., be sure to check the Non Payment box when building a report from *Existing Reporting > Search Transactions*.

Note: Non Payment form submissions will not count towards any monetary goals established, or appear on the Fundraising Thermometer or Donor Wall for your associated activity. Consider recording an Offline Donation if you wish to have these alternative form submissions reflect a monetary value on any public pages.