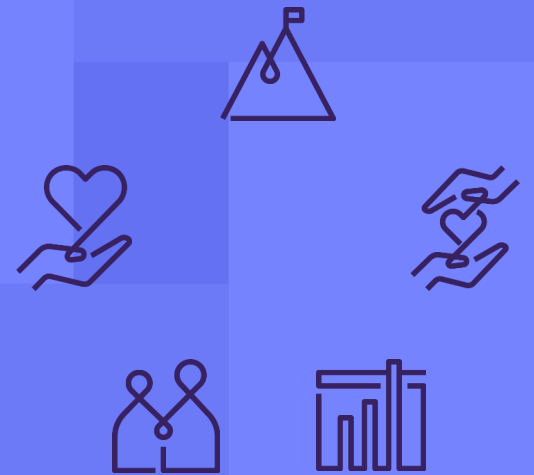


DONOR ENGAGEMENT

Designing Online Forms; A Best Practice Guide



Introduction & Learning Objective

Meet your Trainer...

Jaime

Training Specialist

Donor Engagement

EveryAction



Webinar Learning Goals

By the end of this webinar, I will:

- Review the variety of Online Actions forms to understand their functionality
- Understand how and when to use each Online Actions form and their use cases
- Learn how each form differs from the others in function and form



Agenda

1. Online Actions Introduction
2. Using Forms
3. Advocacy Forms
4. Contribution Forms
5. Ticketed Event Forms
6. Peer-to-Peer Fundraising Forms
7. Event Host Forms
8. Story Collection Forms
9. Q&A



Online Actions Introduction

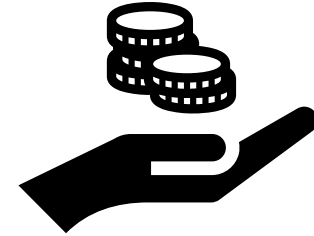
Online Actions Overview

With **Online Actions** you can gather information from and share information with new and existing supporters. **Create Forms** for advocacy, contributions, events, petitions, email and volunteer signups, and story collection. **Create Pages** to publicize organizational updates, events, and election data. You can also use them for attendee check-in.

These tools **support organizational growth, fundraising goals, and the success of your overall mission.** Basic performance metrics display on your Dashboard. You can also run reports for a comprehensive reading.



Online Actions Introduction



Online Actions:

- Successful network effect creates streamline form filling and supported by Fast Action
- Adaptable forms ensure your beautiful forms are compatible across devices
- Fast loading speeds and social media functionality engage audiences with prompt responses
- Limitless forms ensure you are reaching all your audiences for all your purposes
- 100% EveryAction integration means seamless data reporting and record updating in real time!

Online Actions

With **Online Actions** you can gather information from and share information with new and existing supporters.

Create Forms for advocacy, contributions, events, petitions, email and volunteer signups, and story collection.

Create Pages to publicize organizational updates, events, and election data. You can also use them for attendee check-in.

These tools **support organizational growth, fundraising goals, and the success of your overall mission.** Basic performance metrics display on your Dashboard. You can also run reports for a comprehensive reading.



Tracking Online Actions

Gather and share information with supporters using Online Actions forms that support organizational growth, fundraising goals, and the success of your overall mission. You can track supporters' engagement with your forms and create lists based on the information they shared, contributions given, or the events they signed up for.

There are many ways to track the results of your form submissions, including from:

- the Online Actions dashboard
- the Online Activity Report
- the Online Forms Comparison Report
- individual contact records

You'll also be able to use the results of form submissions to search for contacts using Create a List.



Using Forms

Using Forms

The forms available to you depend on which packages your organization purchased:

- **Advocacy** - available with the Advocacy package [Read more about creating Advocacy Forms](#)
- **Contribution** - available with EA Digital, NGP Digital, and Online Contributions packages [Read more about creating contribution forms](#)
- **Event Host** - available with EA Digital, NGP Digital, and Digital Organizing packages [Read more about creating Event Host Forms](#)
- **Ticketed Event** - available with EA Digital, NGP Digital, and Online Contributions packages [Read more about creating Ticketed Event forms](#)
- **Event Signup** - available with EA Digital, NGP Digital, and Digital Organizing packages [Read more about creating Event Signup Templates](#)
- **Peer-to-peer** - available with Peer-to-Peer package [Read more about creating Peer-to-Peer Fundraising forms](#)
- **Story Collection** - available with Digital Stories package [Read more about collecting and managing Stories](#)
- **Volunteer** - available with EA Digital, NGP Digital, and Digital Organizing packages
- **Petition** - available with EA Digital, NGP Digital, and Digital Organizing packages
- **Signup** - available with EA Digital, NGP Digital, and Digital Organizing packages

Advocacy Forms

Advocacy Forms

Advocacy forms make it easier for your supporters to amplify your message.

Using your form, supporters can deliver your pre-written messages to your selected targets via email or social media, or they can follow your scripts or audio instructions for speaking directly to chosen targets by phone.

Creating the forms is much like creating any other kind of form except you will have an added Configure Advocacy step to help you select your targets and pre-written message or script.

For a step-by-step walkthrough of creating an Advocacy form, reference [How to: Create Advocacy Forms](#)

Keystone XL Pipeline defeated in Senate vote

The Keystone XL Pipeline Act of 2014 was defeated in the Senate. Find out how your Senator voted and let them know that the future demands a clean energy solution -- one that protects our nation's security and economy and protects our planet for generations to come.

1 Details 2 Messages 3 Confirmation

Message Recipients

Send all messages

Send the following messages:



Tim Kaine
US Senator (D)

Thanks for your help in defeating the Keystone XL Pipeline

Dear Senator,

A barrel of oil-sands crude creates 17 percent more greenhouse-gas emissions than the average barrel of oil used in the United States. The Keystone Pipeline Act of 2014 would have had devastating effects on Alaskan wildlife while furthering our nation's oil addiction.

Personalize your message

We should invest in clean energy to create jobs, establish our economic independence, and protect the environment.

Your vote to defeat it was a vote for our future.

Sincerely,

Chester Tester
3201 Landover St Alexandria, VA 22305-1944
chester.testster@domain.com



Mark Warner
US Senator (D)

You should've voted against the Keystone XL Pipeline

Dear Senator,

The Keystone XL Pipeline would have had devastating effects on Alaskan wildlife while furthering our nation's oil addiction. Despite what you may have been told, this would "not" have lowered the cost of gasoline; it would, however, have increased our greenhouse-gas emissions.

Personalize your message

As your constituent, I am extremely disappointed that you voted in favor of the Keystone XL Pipeline.

Rather than get our oil from the Middle East, we should invest in clean energy, which would create thousands of jobs and protect our planet for generations to come.

Sincerely,

Chester Tester
3201 Landover St Alexandria, VA 22305-1944
chester.testster@domain.com

Start Over

Send all messages

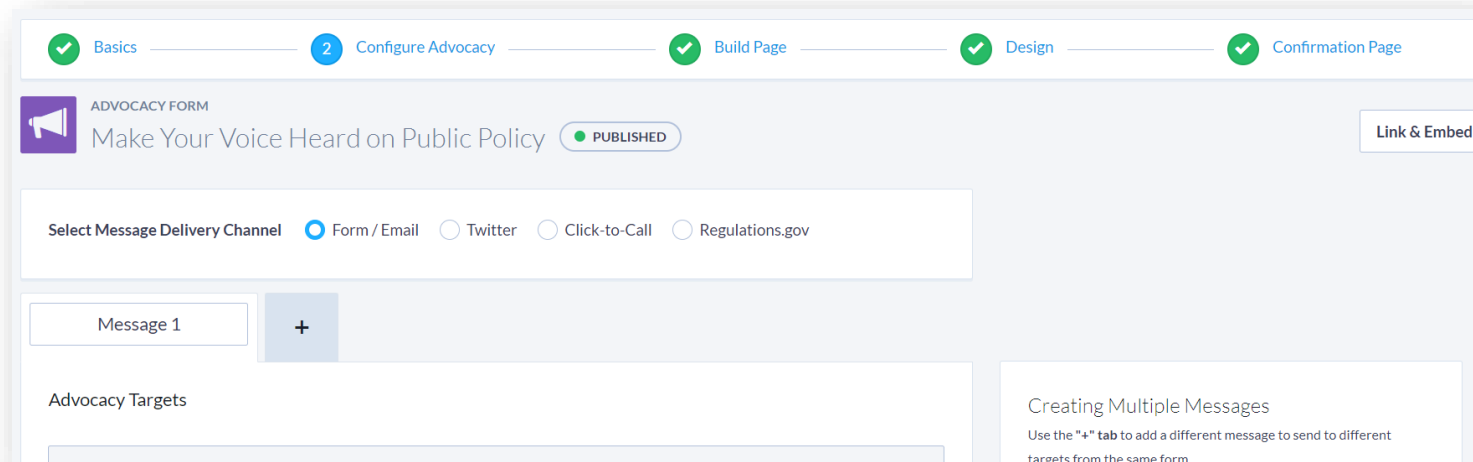
Configuring Advocacy

On the **Configure Advocacy step**, you will be prompted to select an advocacy message delivery method. **Forms/Email is the default method**, which posts to the target's contact form, if one is available. If not, the message is delivered to the target's email address. Alternatively, you can select Twitter, Click-to-Call, or Regulations.gov as a channel.

If you wish to deliver different messages to different targets using a single form, you can do so by creating additional messages.

For example, if you want to thank some U.S. Senators for voting against a bill and shame other U.S. Senators for voting in favor of that same bill, click **Add message for different targets** to create a second message to be delivered to the second set of targets. Doing so will save the values for the first message and copy them over to the second (except for the targets), allowing you to tweak your content for the second message as needed.

You can edit the name of your message (not visible to supporters) to keep track of which message has which content/targets. You can create up to 4 messages for a single **Advocacy** form.



The screenshot shows the 'Configure Advocacy' step in a multi-step process. The progress bar at the top indicates the following steps: Basics (completed), 2 Configure Advocacy (current step), Build Page (completed), Design (completed), and Confirmation Page (completed). The main content area is titled 'ADVOCACY FORM' and 'Make Your Voice Heard on Public Policy' with a 'PUBLISHED' status. A 'Link & Embed' button is visible in the top right. Below this, there is a 'Select Message Delivery Channel' section with radio buttons for 'Form / Email' (selected), 'Twitter', 'Click-to-Call', and 'Regulations.gov'. A 'Message 1' tab is active, and a '+' button is used to add more messages. The 'Advocacy Targets' section is partially visible at the bottom. A help box titled 'Creating Multiple Messages' explains: 'Use the "+" tab to add a different message to send to different targets from the same form.'

Contribution Forms

Contribution Forms

Online Actions **contribution forms help you collect donations** for each of your efforts with customizable features, *plus* the tools to drive donors to your forms through many different channels, including Targeted Email, Digital Ads, Mobile Messaging, phone campaigns, and more.

Like all of our Online Actions forms, **you can customize the look and feel and set up tracking** that will help you measure your success in reaching supporters.

Please note: *Selecting a Designation and Gateway to process donations must be done before creating a contribution form.*

For a step-by-step walkthrough of creating a Contribution form, reference [How to: Create Contribution Forms](#)



Setting Up the Basics: Establishing a Designation and Gateway

Building your form begins on the Basics page of the form builder. Here is where you will provide a Name and Title for your form and set up other important features to make collecting donations more efficient.

One of the most important first steps in creating your form is selecting the correct **Designation** and **Gateway** to process your donations. You can select these under the **Connect a Gateway to Accept Contributions** section.

Connect a Gateway to Accept Contributions

Select the designation and gateway account(s) you will use to accept credit cards, PayPal, or other payment methods from your supporters.

Designation *

--Select a Designation--

[+ Show Advanced Fraud Protection Options](#)

Payment Methods

Our forms are designed to work with many different kinds of payment methods, including credit cards, EFT, and online payment platforms like Apple Pay, and PayPal. You can begin the setup process yourself for the following vendors and payment methods:

- [Bonterra Payments](#)
- [Apple Pay](#) (available as an additional payment method on Paragon gateways)
- [PayPal](#)

For non-US currencies, you will need to set up Stripe.

- [Read more about setting up Stripe Connect in EveryAction](#)
- [Read more about setting up Stripe Connect in NGP](#)

Fast Action

You can also **make it easier for supporters to engage and donate with FastAction Auto Fill and Auto Processing**. The FastAction network of saved profiles pre-fills supporters' data on your forms and allows them to contribute or take action in a single click.

[Read more about our FastAction network](#)

Enable One Click Conversions With FastAction

FastAction allows supporters to securely store their contact information and tokenized credit card, to make submitting forms easier across the network of FastAction clients.



Enable FastAction Auto Fill

Allow FastAction to prefill the contact information sections of your forms. Supporters will also be able to create and manage their FastAction account.

Enable FastAction Auto Processing

Allow supporters to donate with one click via a SmartLink sent in Targeted Email. Supporters will also be able to create and manage their FastAction account.

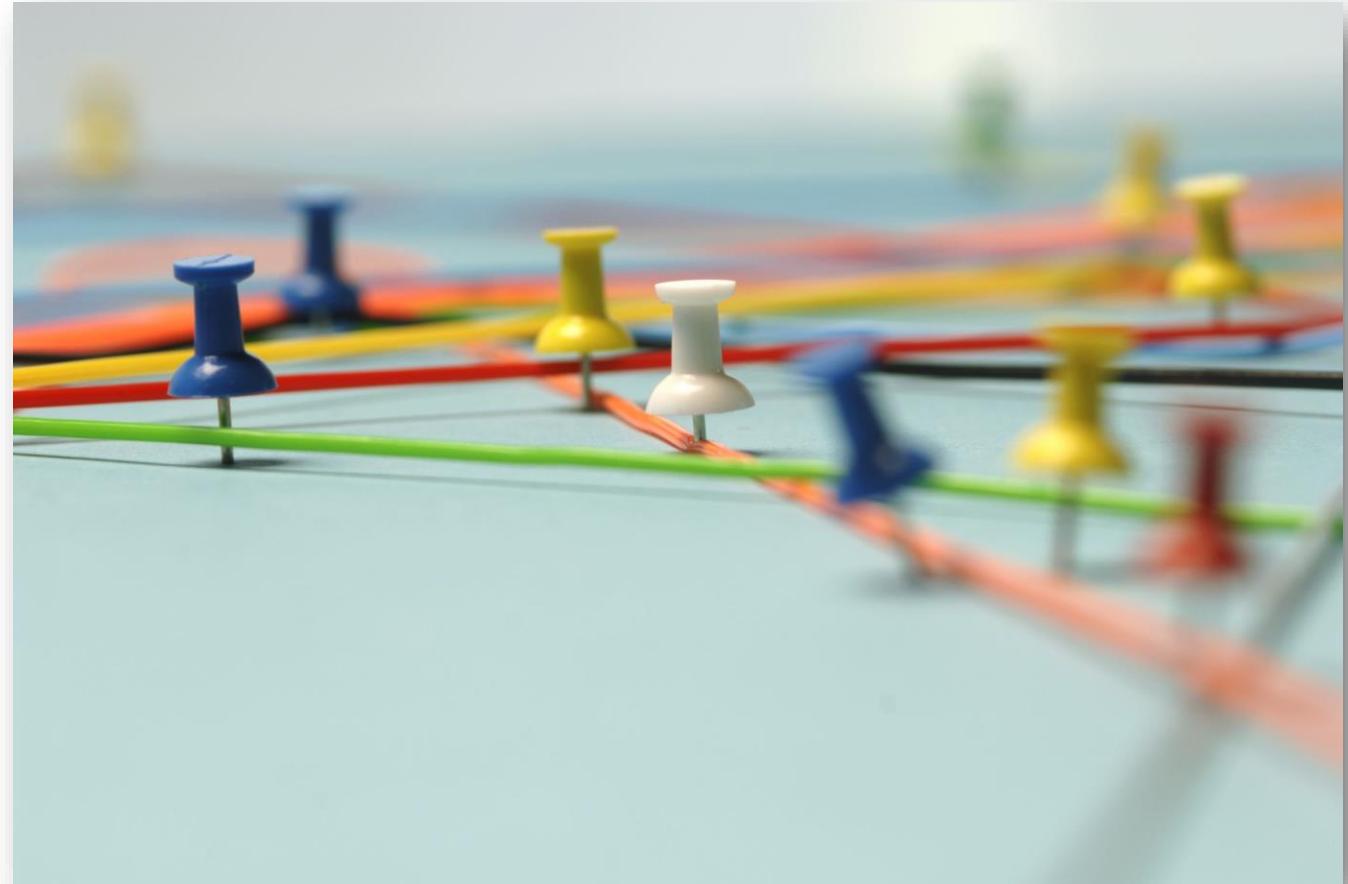
Smart Links and Track Your Efforts

Create a more personalized experience by using **Smart Links** in your Targeted Email to override the one-time amounts that display on your form based on your donor's previous giving history. This will help you customize the amounts in your form to better match your donor's current level of giving.

[Read more about adding Smart Links to prefill forms](#)

In the **Track Your Efforts** section, you can create customized forms that can be shared by your fundraising partners and then track how much they raised by adding them as Attributed Contacts.

[How to: Add Attributions and Soft Credits](#)



Ticketed Event Forms

Ticketed Event Forms

Once you have created a **Ticketed Event** you can publish up to 10 different Ticketed Event forms for that event to let attendees register and purchase tickets online. You will be able to control how the ticket levels display to your supporters on the form.

[Read more about creating ticketed events](#)

You can also create publicly available **Event Signup Forms** for your non-paid events.

[Read more about creating other kinds of event forms](#)

For a step-by-step walkthrough of creating a Ticketed Event Form, reference [How to: Create Ticketed Event Forms](#)



Tickets

In the **Tickets** section, you can select which ticket levels and labels should display on the form. The ticket levels available, along with their description, price, and max per transaction values are all read-only values that you previously configured when setting up your event. If you wish to edit these values, you must edit your event and re-publish any forms associated with the event.

In the **Additional Event Information** section, you can configure if the supporter should be prompted to:

- select a **Host Committee** member (and if a selection should be required); and
- provide a **Guest Name** for each ticket (and if a name is required); and
- make an **Additional Contribution**

The labels for all 3 fields are configurable and you can select a default value for both the **Host Committee** and the **Additional Contribution** fields.

The screenshot displays the configuration interface for event tickets and additional information. It is divided into two main sections: 'Tickets' and 'Additional Event Information'.

Tickets Section:

	Name	Label	Description	Price	Max per Transaction
<input checked="" type="checkbox"/>	Gold	Gold	Best	\$50.00	5
<input checked="" type="checkbox"/>	Silver	Silver	Better	\$25.00	15
<input checked="" type="checkbox"/>	Bronze	Bronze	Good	\$15.00	25

Additional Event Information Section:

	Label	Req?	Default
<input type="checkbox"/>	Host Committee	<input type="checkbox"/>	--Host Committee--
<input checked="" type="checkbox"/>	Guest Names	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Additional Contribution		\$0.00

Cost Covering on Ticketed Events Forms

You can enable **Cover Costs** and ask your donors to help you cover the cost for processing their donation. This is one effective way to boost your donations.

Once you enable **Cover Costs**, your donors will see the check box under the ticket selection and guest names, if applicable.

Cover Costs
Prompt supporters to increase their contribution amount. This can be used to cover fees charged by payment processors, shipping costs for items sent to the supporter, or other administrative costs.

Field Type	Field Label	Default Value
<input checked="" type="checkbox"/>	Cover Costs	<input type="checkbox"/> I'd like to help cover the transaction fees f Formula: $3.25\% + \$0.20$ Edit Formula

Ticket & Guest Information

Ticket Level	Quantity
Gold (\$25)	<input type="text" value="2"/>
Silver (\$15)	<input type="text" value="- Quantity -"/>
Bronze (\$5)	<input type="text" value="- Quantity -"/>

Additional Contribution (Optional)

I'd like to help cover the transaction fees for my contribution. My total amount will be **\$51.83**

Payment Information

Card Number Expiration Date Security Code

Customizing Your Confirmation

The **Confirmation Page** step is largely similar to other forms but you will see additional Event-related merge fields available.

The {{EventTickets}} merge field will generate an HTML table that consists of the **Guest Names** (if provided), **Ticket Levels**, **Quantities**, and **Prices**. This merge field is available for both the **Thank You** page and the **Confirmation Email**.

You can also use the {{AddToCalendarLinks}} merge field to generate **Add to Calendar** links that will allow your attendees to automatically add the event to their Apple, Google, Outlook, Outlook.com, or Yahoo calendar.

Your Tickets

Name	Level	Quantity	Price Each
Eva Rodriguez	Gold	1	\$25.00
Manny Rodriguez	Gold	1	\$25.00
Subtotal			\$50.00

When

Friday, October 15, 2021

5:00 PM to 6:00 PM ET

Add to Calendar

[Apple Calendar](#) - [Google](#) - [Outlook](#) - [Outlook.com](#) - [Yahoo](#)

Peer-to-Peer Fundraising Forms

Peer-to-Peer Fundraising Forms


The **Peer-to-Peer** fundraising add-on tool allows users to create a social media based fundraising campaign that engages and empowers an organization's supporters. Supporters are able to create a personalized campaign based upon the template created and shared by users.

Creating a **Peer-to-Peer** fundraising campaign begins by selecting the **Peer-to-Peer** form type within **Online Actions**. Set up closely mirrors the process of a normal [Online Action form](#) with the added step of **Configure Peer-to-Peer**.

For a step-by-step walkthrough of creating a Peer-to-Peer Fundraising Form, reference [How to: Create Peer-to-Peer Fundraising Forms](#)

Help me raise money as part of my marathon run!

Next month I will be running in the Boston Marathon and need your help raising money for a great cause.



fastAction

Contact Information

First Name: John
Last Name: McPerson
Street Address: 48 Grove St
Zip Code: 02144
City: Somerville
State: MA
Email: jmcperson@ngpvan.com
Home Phone (Optional): 2026869330

Employer Information

This information is required by law.

Occupation: Seltzer Stocker
Employer: NGP VAN

If you are self-employed, please list the name of the entity that is on your paycheck. Please list your line of work. "Business Person" is not acceptable, please enter the type of business instead. We respectfully request that Partners of Partnerships and Members of LLC's contribute individually, instead of through their respective business entity.

Contribution Information

Payment Information

Card Number: **** * 1111
 Update my FastAction profile with this information

Setting Up Peer-to-Peer

Select an existing **Contribution Form** that will be used to display contribution options to donors.

The next section sets up the **Default Fundraising Page**. These fields will become the default values on the landing page that your supporters can customize for their own fundraising campaigns.

The default **Title**, **Description**, and **Goal** can all be edited by users to personalize the messaging that you put here.

Select Contribution Form

All Peer-to-Peer Fundraising pages generated from this signup form will use the selected contribution form.

Available Contribution Forms *

Create a Default for Peer-to-Peer Fundraising Pages


Default Title

Default Description

Default Goal *

Upload Default Image

[Upload new](#) bostonstrong500.jpg x



The recommended image width is around 300-400px. Image size should be 30kb-80kb for optimum page display.

Setting Up Peer-to-Peer

The **Fundraiser Notification Email** will be sent to your supporters when a donor contributes to their campaign. Donors will receive the confirmation email from the contribution form that was selected above.

Finish configuring the remaining form sections as you would any other form. The **Build Page** will capture information from the people that sign up to fundraise for you, while the underlying contribution form will capture the data from their donors.

The screenshot shows the configuration interface for a "Fundraiser Notification Email". At the top, there is a title "Fundraiser Notification Email" and a checked checkbox labeled "Send Fundraiser Notification Email". Below this, there are three input fields: "From Name" with the value "Runners for Good", "From Email Address" with the value "info@runners.com", and "Reply-To Email Address" with the value "info@runners.com". A "Subject Line" field contains the text "You have received a new donation for your fundraiser". Under the heading "HTML Email Content", there is a "Merge Fields" dropdown menu and a "Preview" button. The main content area is a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and image. The text in the editor reads: "Congratulations!
Your fundraiser has received a {{ContributionAmount}} contribution from {{DonorFullName}}.
Make sure to share your [fundraising page](#) with friends. You can also visit your [fundraiser portal](#) to see a full list of contributions you've raised and update your settings."

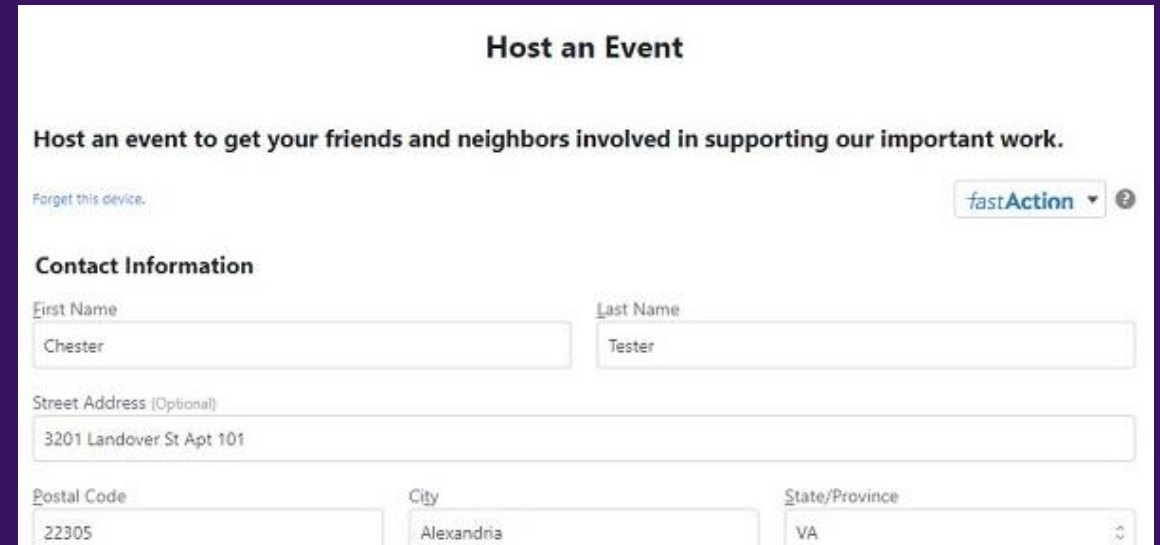
Event Host Forms

Event Host Forms

If you plan to encourage your supporters to host events on your behalf, you can track their efforts by encouraging them to signup using your **Event Host Form**.

Once you create these forms in **Online Actions**, you will be able to share these forms with potential hosts. Once they submit their **Event Requests** you can then approve or deny the request.

For a step-by-step walkthrough of creating an Event Host Form, reference [How to: Create Event Host Forms](#)



The screenshot shows a web form titled "Host an Event". Below the title is a sub-header: "Host an event to get your friends and neighbors involved in supporting our important work." There is a "Forget this device." link and a "fastAction" button with a help icon. The form is divided into a "Contact Information" section with fields for "First Name" (Chester), "Last Name" (Tester), "Street Address (Optional)" (3201 Landover St Apt 101), "Postal Code" (22305), "City" (Alexandria), and "State/Province" (VA).

Story Collection Forms

Collect and Manage Stories

A heartfelt personal story can encourage your supporters to engage emotionally with your message and move them to take further action.

The **Stories** feature makes it easier for you to collect these testimonials and verify their details before sharing them with your campaigns or marketing staff.

In addition to collecting the content, you will be able to:

- Invite supporters to share their anecdotes using an Online Actions form
- Assign staff to follow-up and verify the stories you receive
- Associate the stories with specific campaigns and view them on contact records
- Attach additional photos, documents, video links, and private notes to each story



How has our program impacted your community?

First Name

Hester


Last Name

Good

Email

email@address.com

Mobile Phone (Optional)

 (415) 555-5555

Share Your Story

Add a headline for your story (Optional)

From the Food Bank to the Boardroom!

Tell us your story!

I went through a rough time right after high school. I made some bad choices that left me homeless and hungry. But when I met Matilda at People for Good, things started to change for the better for me. She made sure I always had a warm meal and she reached out to her college friends to see if they could help me apply for the local community college.

Today I run a large corporation and I am forever grateful for her help and the stability People for Good gave me at a rough time in my life.

Submit

Collecting Stories Using Online Forms

An easy way to begin adding stories to your collection is to create an **Online Actions** form that supporters can submit. (Stories are limited to 8,000 characters.) You can then share that link with supporters or add it to your website.

Creating a **Story Collection** form is similar to creating other kinds of forms.

For a step-by-step walkthrough of creating a Story Collection Form, reference [How to: Collect and Manage Stories](#)



Q&A

Q & A



Additional Resources

Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



Additional Training

- Bonterra Academy:
<https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>
- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



Help Center Resources

- [Overview: Online Actions](#)
- [How to: Create Online Actions Forms](#)
- [How to: Create Advocacy Forms](#)
- [How to: Create Contribution Forms](#)
- [How to: Create Ticketed Event Forms](#)
- [How to: Create Peer-to-Peer Fundraising Forms](#)
- [How to: Create Event Host Forms](#)
- [How to: Collect and Manage Stories](#)



Thank You for Attending!

