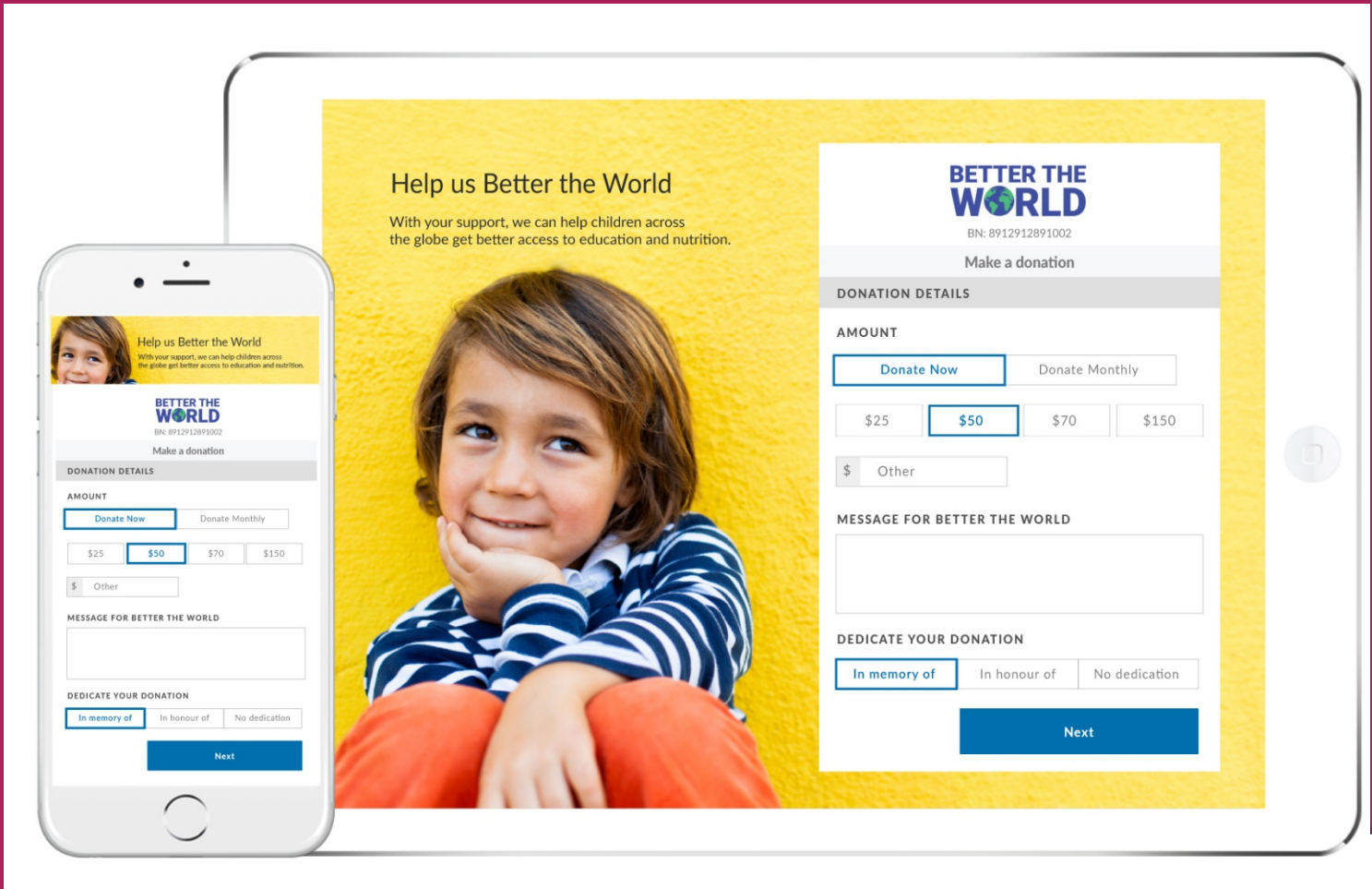
Maximize Your Online Donations with Customizable Donation Forms!



#CanadaHelpsChats

CanadaHelps.org
giving made simple

CanadaHelps is a non-profit social enterprise serving charities & donors.

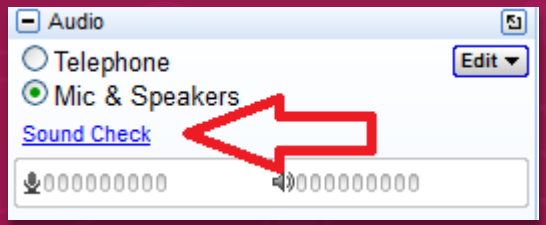
CanadaHelps is a charity that helps charities. We ensure all Canadian charities – most notably the smallest ones that need it the most – have access to the online fundraising tools, technology, and education they need to succeed. Because we're a charity, our fees are a fraction of those of the for-profit alternatives.

For donors, we offer a one-stop shop for supporting any registered Canadian charity online. CanadaHelps makes giving easy. Easily explore and discover new causes. Give once or monthly, donate securities, or increase your impact fundraising for charity. Enjoy instant or anytime access to all your charitable tax receipts.

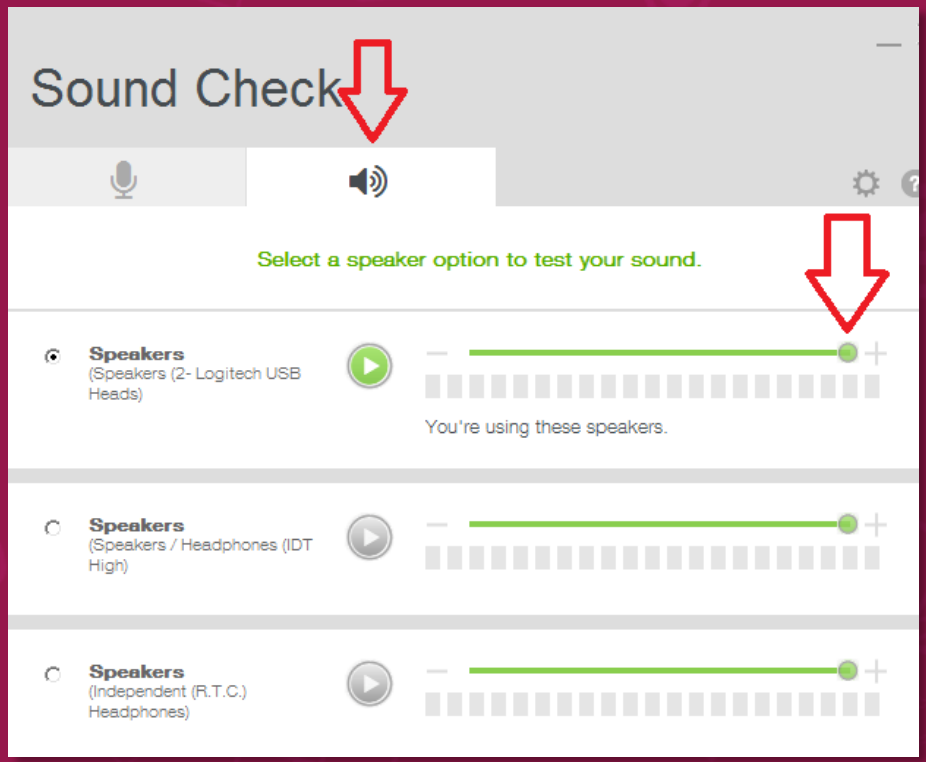
At a glance: Trusted for over 17 years, over 18,000 charities rely on our non-commercial online fundraising platform and more than 1.7 million Canadians have given using CanadaHelps. We have a spotless record for safe and secure payment processing & instant tax receipting.

Webinar Reminders

Trouble hearing us?



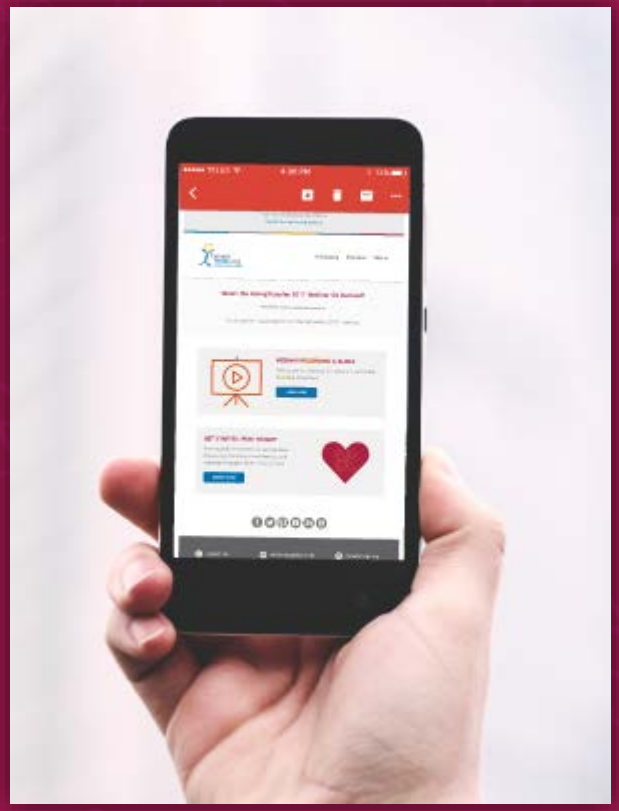
- Turn up your computer's volume.
- Click Sound Check under Audio in your GoToWebinar Panel.
- Select the speaker tab and then turn the volume on the speaker to the far right for maximum volume.



Webinar Reminders

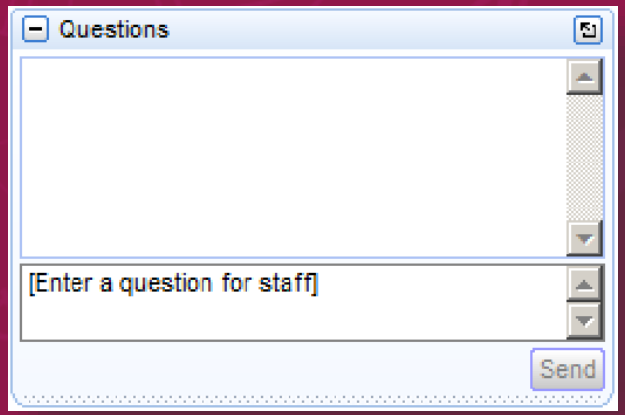
- For the best webinar experience, close all other applications.
- Yes!

  The links to the webinar slides and recording will be emailed to you within 24 hours. You'll be able to watch the recorded video on demand.



Webinar Reminders

- You can hear us, but we can't hear you.
- Have questions? Type them into the Questions Log at anytime.
- Join the conversation on Twitter using the hashtag #CanadaHelpsChats



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It’s easier than ever to collect donations from your charity’s website.

Let’s find out how.

You Will Need A CanadaHelps Account

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Register Here For Free:

http://bit.ly/FundraiseWithCanadaHelps

No-Up Front or Recurring Fees
Access to CanadaHelps.org Profile
Educational Resources
All of Our Fundraising Tools
For Custom Donation Forms, 3.5%
Instant Tax Receipting

Not Seeing the Tools? Upgrade!

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Home | Profile | Donations | Funds | Account Info

Welcome to Your MyCharity Account

From online fundraising tools to detailed donation reports, you have many tools at your fingertips to help you succeed.
Use the tabs above to navigate your MyCharity account. Below is a breakdown of what you can do in each tab.

Profile
Ensure that when donors search for your organization on CanadaHelps you are well represented with a media-rich profile page. Add photos, videos, and even launch campaigns.

Donations
Get information about donations made to your charity, and all the details of payments to your account.

Funds
Manage fund designations for donors to choose from.

Account Info
Change your admin email address and contact information. Link additional users to help manage your account.

Get Answers

Want to use our Donate Now and P2P Campaign services? Upgrade to a Full Fundraising Account Now

Quickly…

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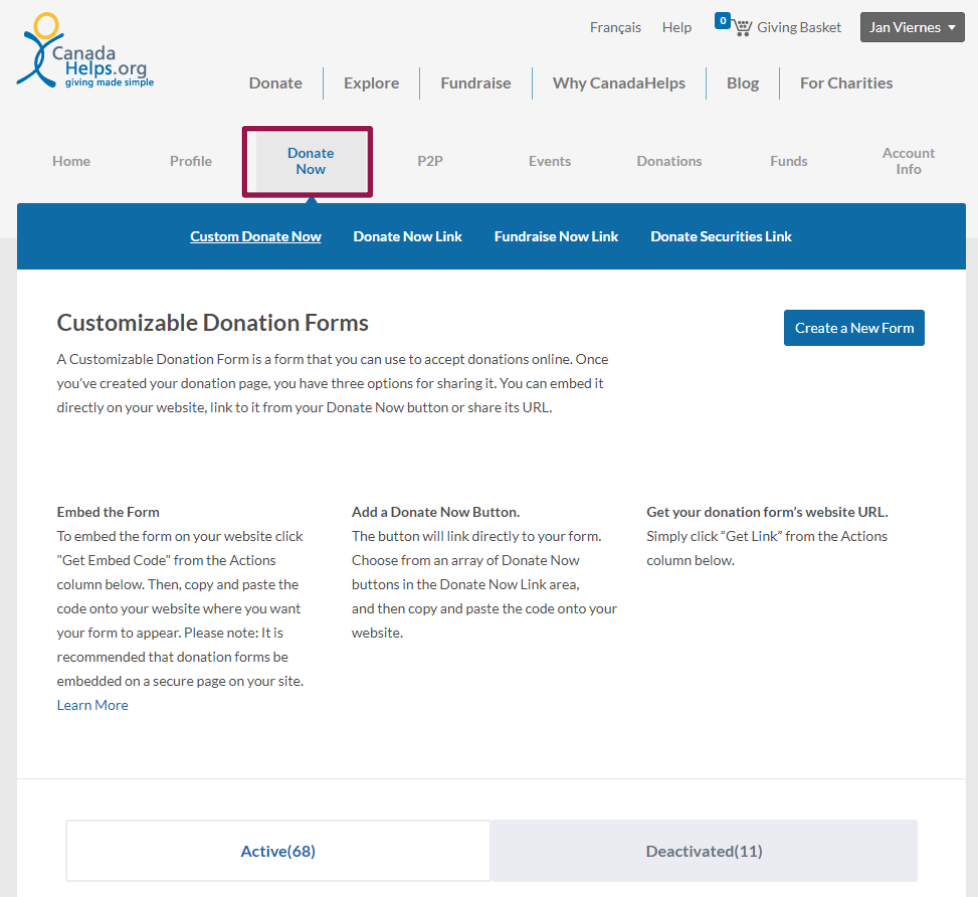
Online giving by credit card is preferred method for 60% of North Americans*
On CanadaHelps this year, 29% of traffic is from a mobile device and 8% is from a tablet.

*2018 Global Trends in Giving Report – GIVINGREPORT.NGO

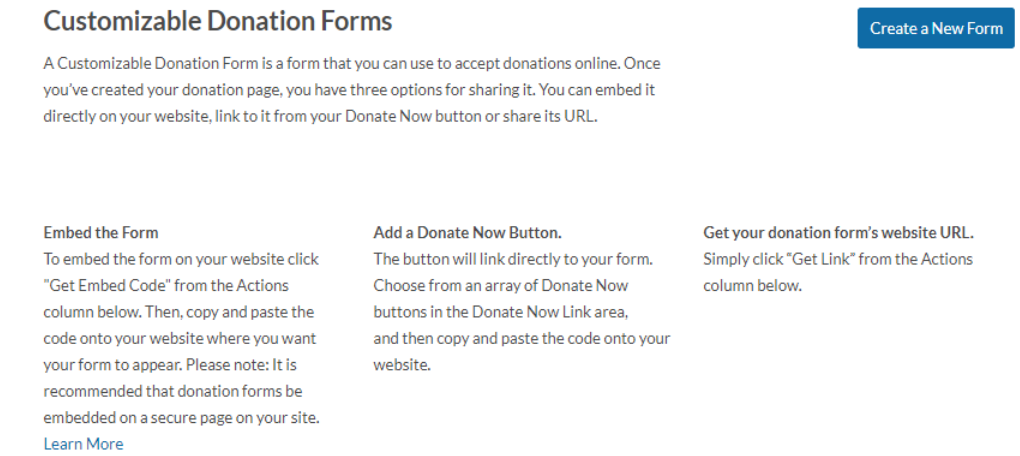
Let's Dive In

Everything related to Custom Donation Forms is in the "Donate Now" section of your charity account.

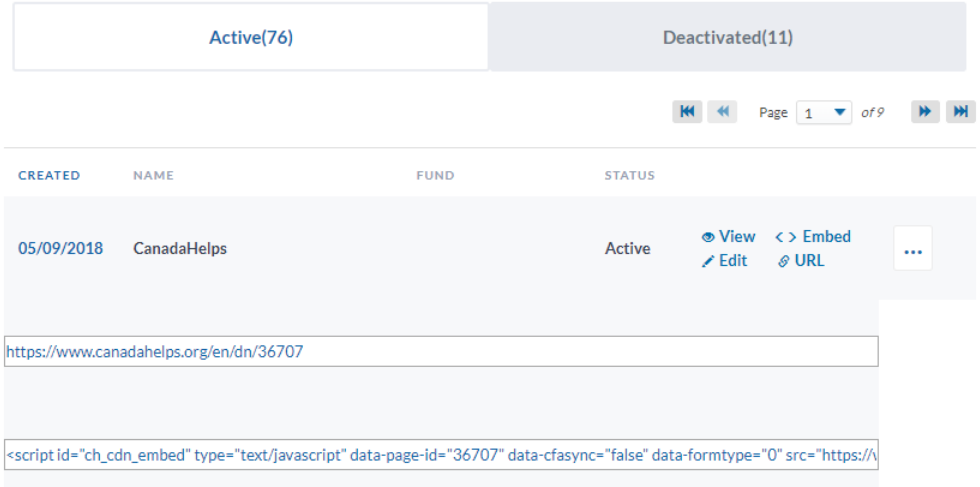


I Know We Said 60 Seconds, But…

- **You already have a form ready-to-go in your account**!
- Basic colours
- Logo is what you have uploaded into your Charity Profile



- Click the URL button if you want to link from your website directly to the form
- Click the "Embed" button if you want the form to live on your website



Setting Up: Linked

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If you do not have a “Donate” button or menu option on your website, add one.

Preferably, you want to choose a colour that stands out and you want the button to be in the main navigation or “above the fold” – meaning a visitor does not have to scroll down the page to see the button. It is visible right on arrival.

Each menu option or button on your website brings your visitor to a specific page. In order to bring the visitor to the linked donation form when they click the donate button or menu option, direct them to the URL that we’ve generated and copied from the “Donate Now” section of your charity account.

Setting Up: Embedded

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Again, if you do not have a “Donate” button or menu option on your website, add one. The same specifications apply as on the previous slide.

Then, create a new “Page” in your website. You can name this page “Donate”, or “Give, or “Support Us”, etc.

Paste the line of code that you’ve generated and copied from the “Donate Now” section of your account into the newly created page.

Each menu option or button on your website brings your visitor to a specific page. In order to bring the visitor to the embedded donation form when they click the donate button or menu option, direct them to the newly created page where you have embedded the form.

Should I Link to the Form? Or Should it Live on my Website?

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- Best practice and best donor experience would be for the form to live on your website
- Donors don't leave your website to complete the transaction
- Donation form can be customized to match the branding of the website
- More integrated feel

BUT

Only if your website is mobile-optimized!

Should I Link to the Form? Or Should it Live on my Website?

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Embed your forms: Donors never leave your site.

What is Mobile Optimization and How Do I Know If My Website Is Designed That Way?

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Basically, if your website is mobile-optimized it is built so that it adjusts itself to give visitors a great experience no matter which device they are using (Computer, Phone, Tablet, etc.)

Is your website mobile-optimized?

Visit your website in your browser and then visit it on a phone. Is it presented in a new way that is easier to navigate on your phone? Or is it cumbersome to navigate on the phone?

There's your answer.

Should I Link to the Form? Or Should it Live on my Website?

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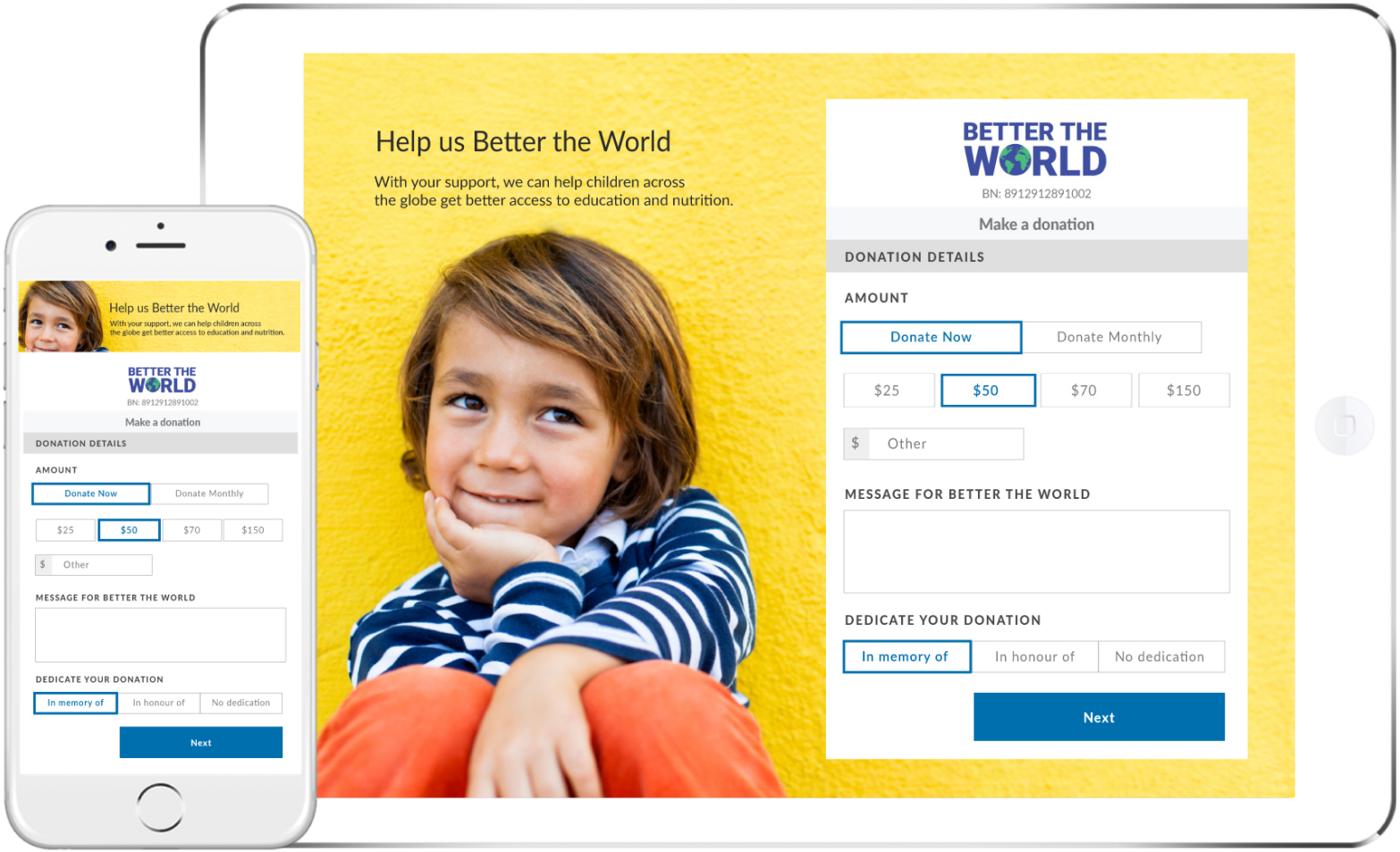
If your website is not mobile-optimized and your donation form lives on your website, it will be challenging not only for people to navigate the webpage, but also for people to complete a donation.

In this situation, you will want to link directly to our mobile-optimized donation forms.

Mobile-Optimized Form



Once We've Figured That Out, What Style of Form?

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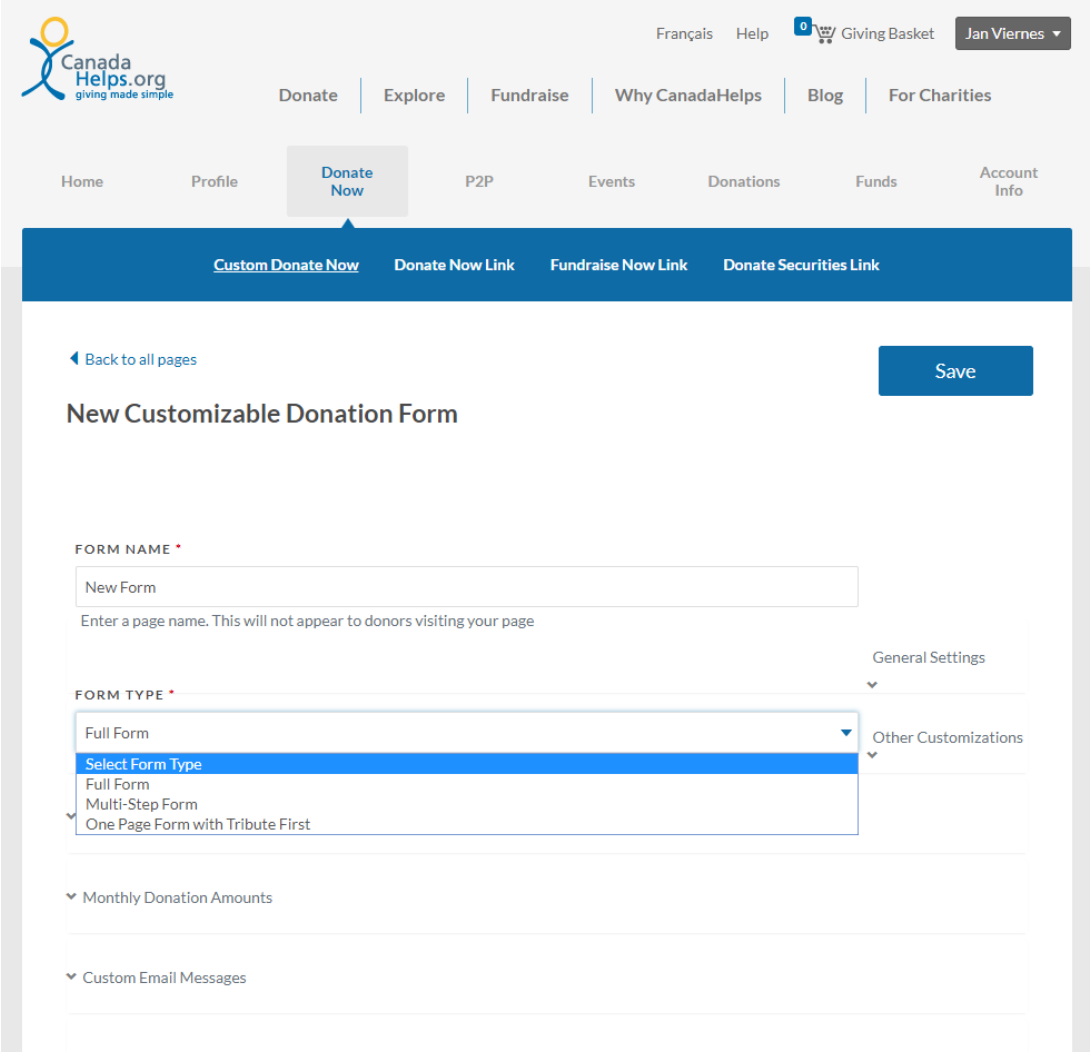
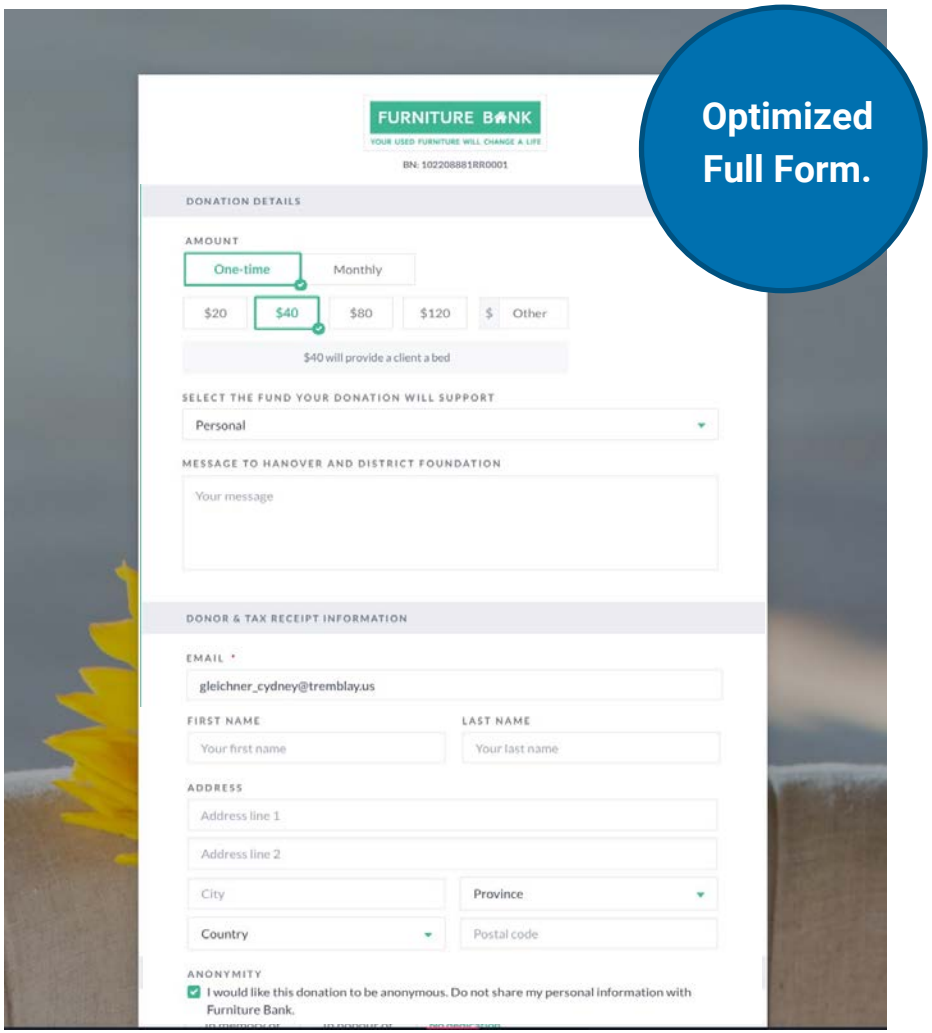
First, edit your existing page or create a new one.

Then, select your form type.



Custom Donation Form Types



Optimized Full Form.

- **Clean Look**
- **Minimize Clicks**

Custom Donation Form Types

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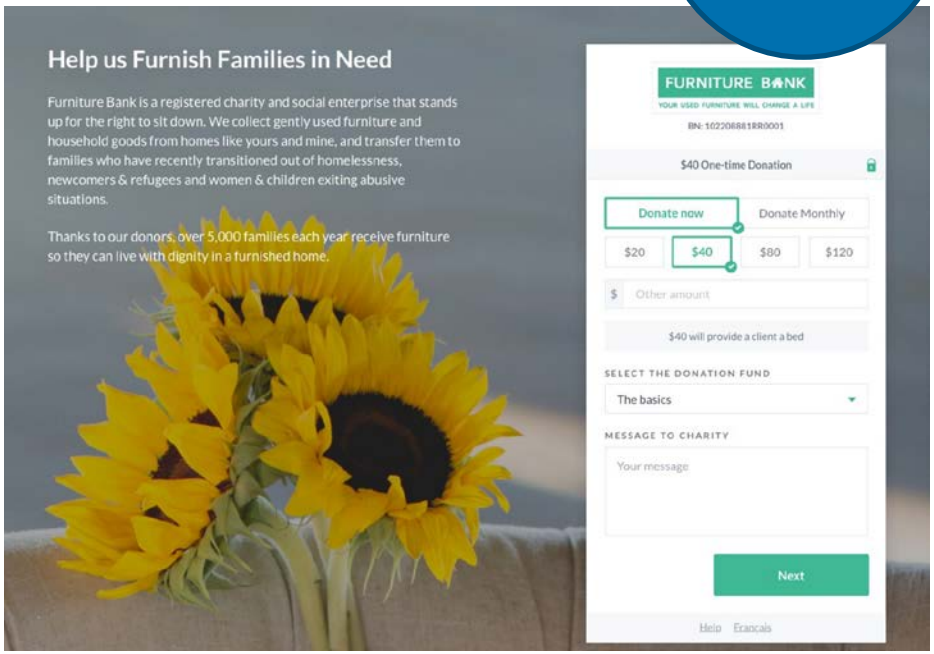
- Feature an image and case for support
- Breaks the donation down into three smaller steps

High Impact 3-Step Form.



Custom Donation Form Types

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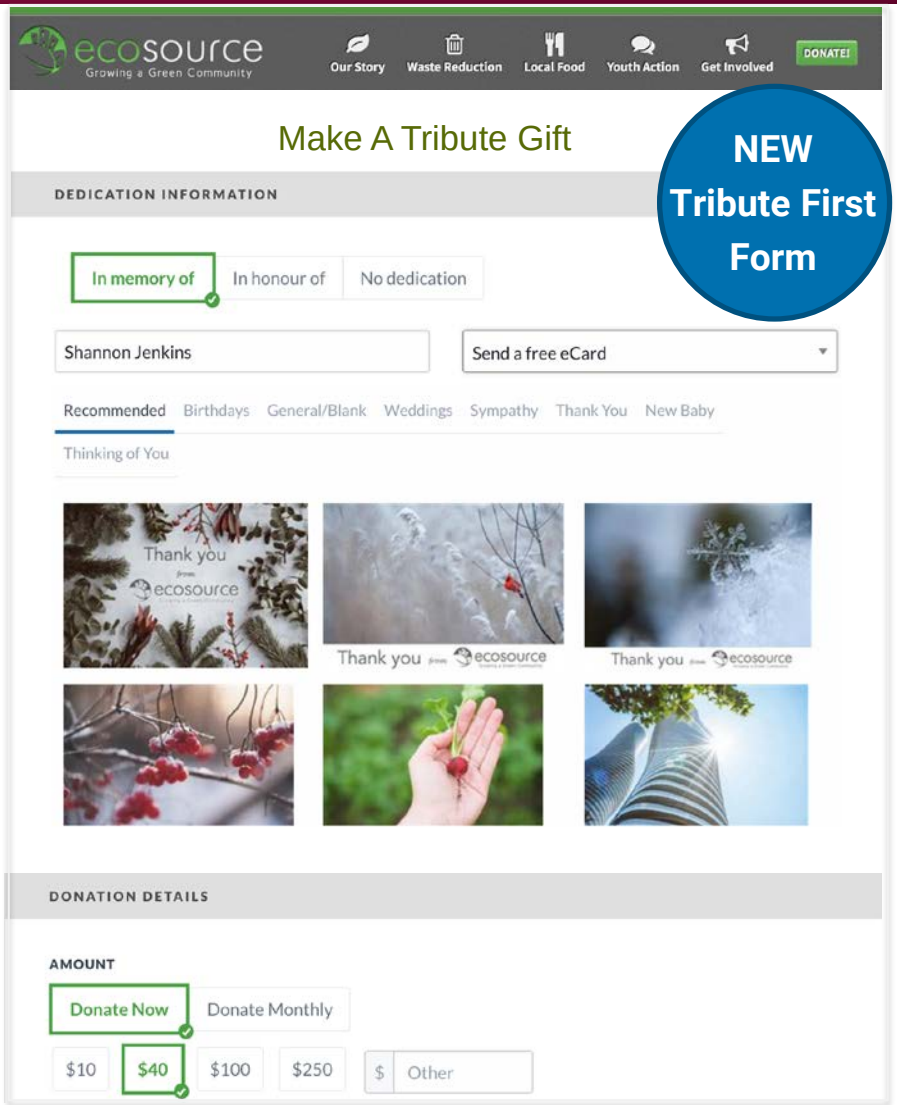
- **For Tribute Donations**
- **Add your own custom e-cards!**



Creating and Editing Your Form: A Map

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Select Fund Choices

Collect mailing preference and phone numbers

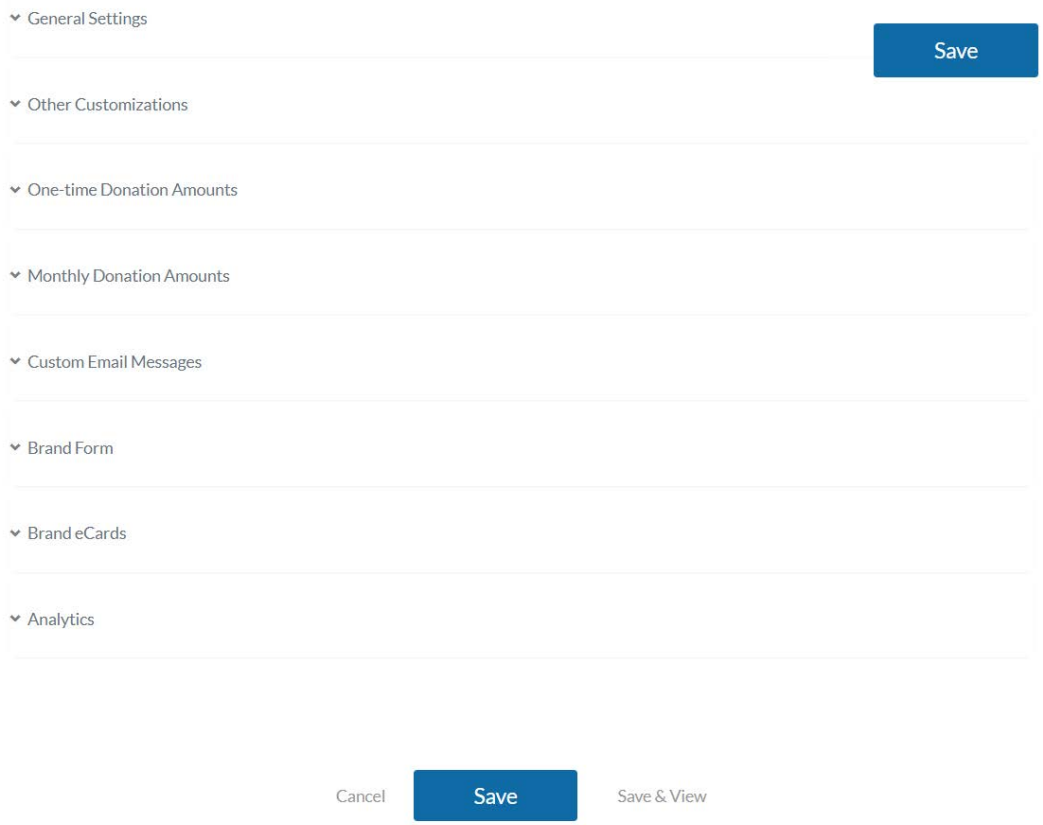
Pre-Set Donation Amounts

Custom Thank You Message

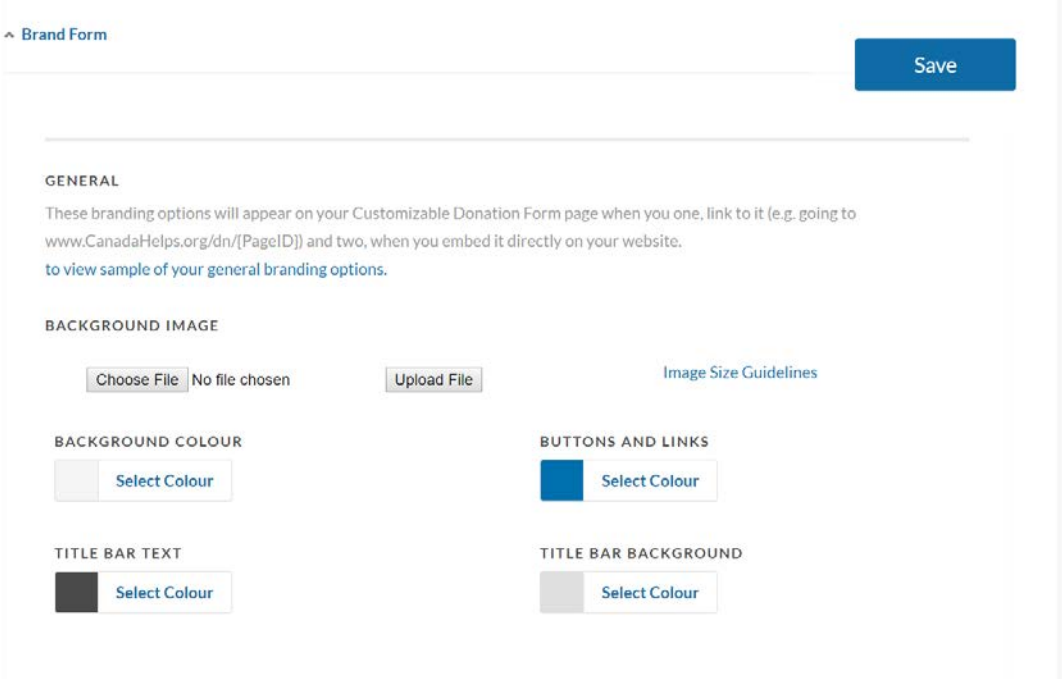
Customize Colours and Images

Include Custom E-Cards

Google Analytics Tracking



Brand Your Form!



Some Suggestions…

Background Colour: Match your website's background!

Title Bar Background: Match your website's, primary, menu, or navigation colour.

Title Bar Text: Make it easy to read! Contrast it from your Title Bar Background. Often a simple white or black is best!

Buttons and Links: Match it to your website's accent colour and to your "Donate" button!

Brand Your Form! A Note On Embedded vs. Linked

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In the Brand Form section, you will be able to customize your form's images and text.

How a form appears embedded is different than when it is linked.

There are two separate sections within the "Brand Form" tab to customize both versions of the form.

Thank Your Donors!

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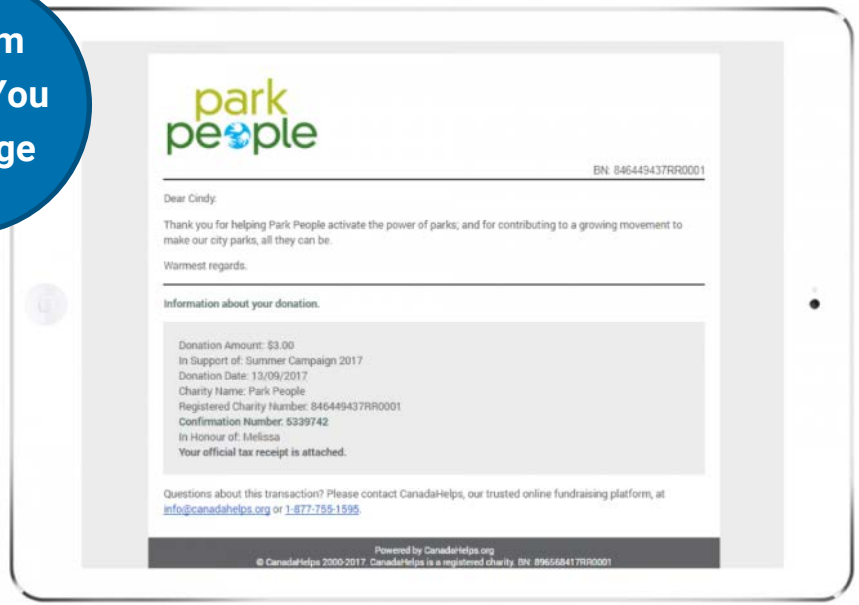
Custom Thank You Message



park people

BN: 846449437RR0001

Dear Cindy:

Thank you for helping Park People activate the power of parks; and for contributing to a growing movement to make our city parks, all they can be.

Warmest regards.

Information about your donation.

Donation Amount: $3.00
In Support of: Summer Campaign 2017
Donation Date: 13/09/2017
Charity Name: Park People
Registered Charity Number: 846449437RR0001
Confirmation Number: 5339742
In Honour of: Melissa
Your official tax receipt is attached.

Questions about this transaction? Please contact CanadaHelps, our trusted online fundraising platform, at info@canadahelps.org or 1-877-755-1595.

Powered by CanadaHelps.org
© CanadaHelps 2000-2017. CanadaHelps is a registered charity. BN: 896568417RR0001

Automatic Branded Receipts

In the **Custom Email Messages** section, set up automated “thank you” messages for both your One-Time and Monthly Donors that are sent out along with your branded Tax Receipt!

Each form can have it’s own custom messages!

Have a Monthly Giving Program? Or a Project/ Campaign?

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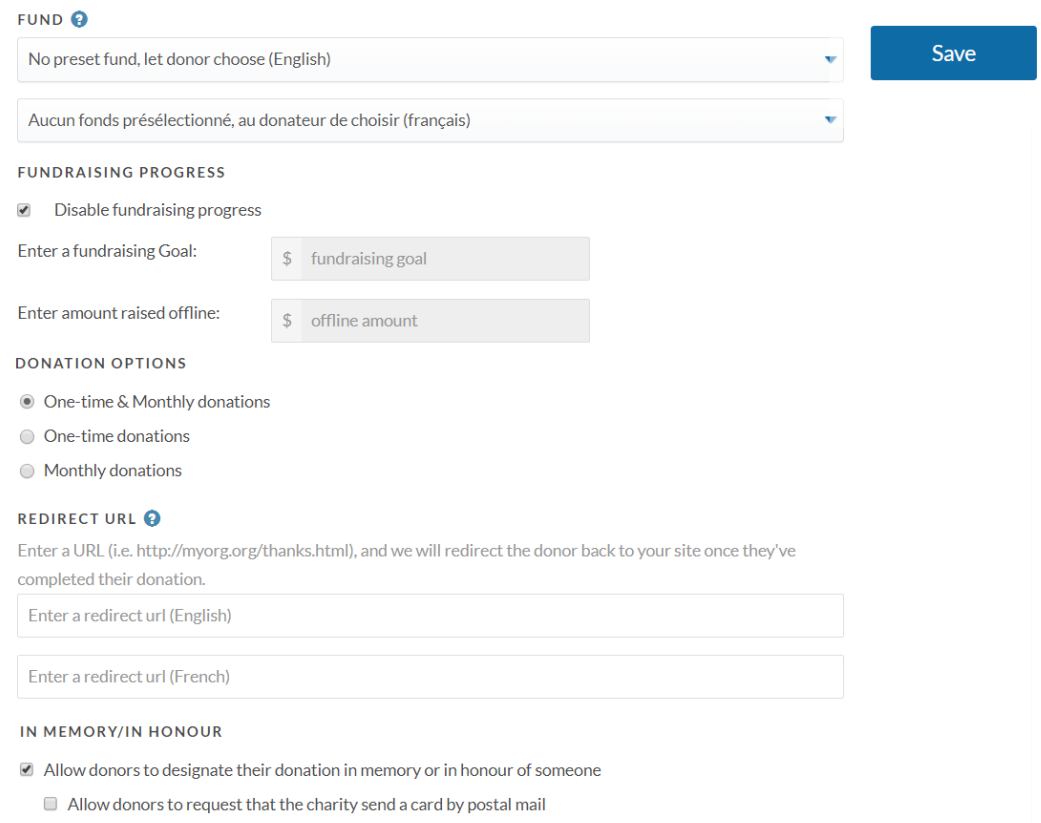
- Create a form special for the project and pre-select a fund so donors don't have to
- Turn on a fundraising thermometer and add offline donations
- Pre-set the form to monthly donations to give a tailored experience
- Say "Thank You" again with a re-direct landing page



Pre-Set Donation Amounts

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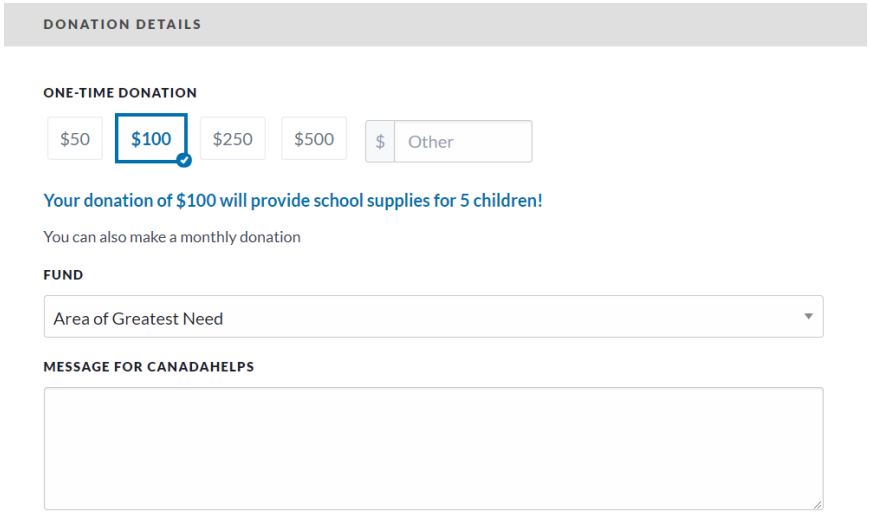
Do you know the tangible impact of a given donation amount?
73% of Canadians said they would give more if they knew the impact of their donation.
Set a pre-set amount and share an impact statement!



Trying to boost your online giving?
Find your average online gift and set your minimum suggested amount slightly higher!

Using Google Analytics?

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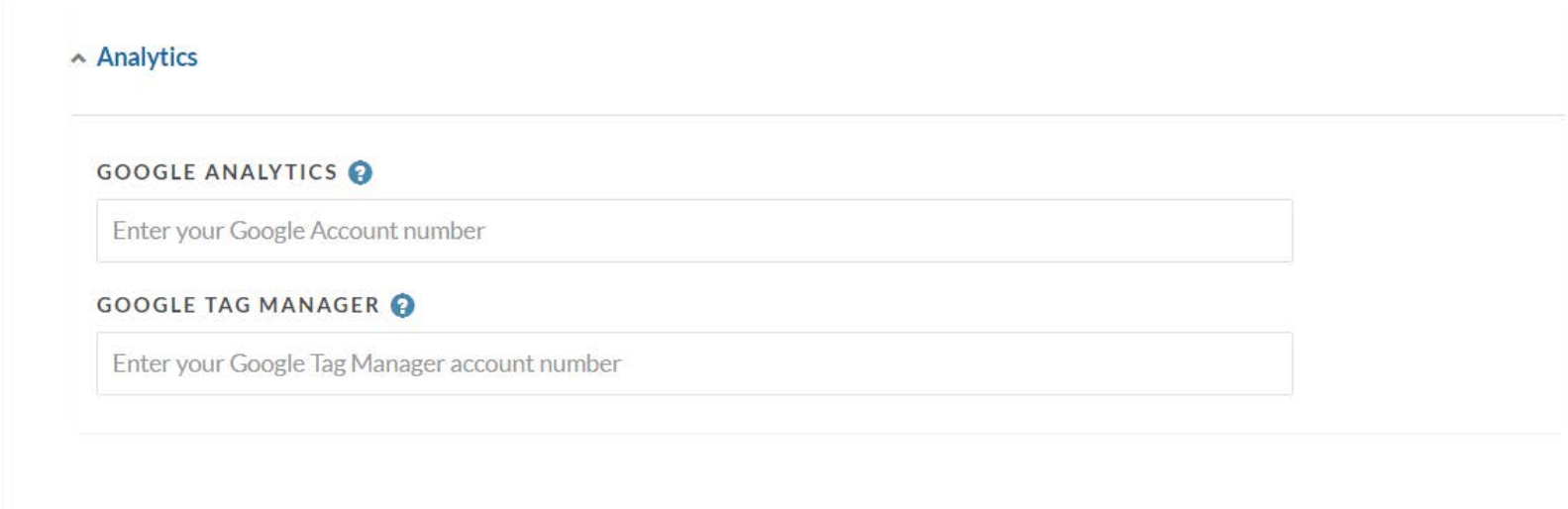
Enter your GA or GTM account numbers to start tracking conversion and where your donors are coming from!



Want to Edit A Form You Are Already Using?

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You will not have to change anything on your website!

Any changes made to your form within your CanadaHelps account reflect live on the form.

No need to call your web designer or put on your developer hat!

CanadaHelps Custom Donation Forms: Ready to go!

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What You Need To Take Home:

- Can be created in MINUTES
- Can create an UNLIMITED number of forms at no cost
- Customizable Branding and Thank You Messaging
- Can live ANYWHERE
  - Corporate Websites – Employee Giving and Matching
  - Partner/ Affiliate Websites
  - Personal Websites
  - Stand-Alone
- Optimized for ANY device
- Get Strategic – Projects, Monthly Giving, Tribute Giving, Direct Mail, Email, Social

Just 3.5%, <u>including</u> credit card fees.

Questions or Comments?

Get in touch!

Jacob O'Connor
Charity Engagement at CanadaHelps
jacobo@canadahelps.org

@CanadaHelps
@CharityLifeCa

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Our Cause is Every Cause

At CanadaHelps, we work with charities from every province and territory across the country, and from every charitable sub-sector. We're invested in ensuring all charities have access to effective technology and education they need to be successful fundraisers.