

# Maximize Your Online Donations with Customizable Donation Forms!

**Help us Better the World**  
With your support, we can help children across the globe get better access to education and nutrition.

**BETTER THE WORLD**  
BN: 8912912891002

Make a donation

**DONATION DETAILS**

**AMOUNT**

**MESSAGE FOR BETTER THE WORLD**

**DEDICATE YOUR DONATION**

#CanadaHelpsChats

# 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.

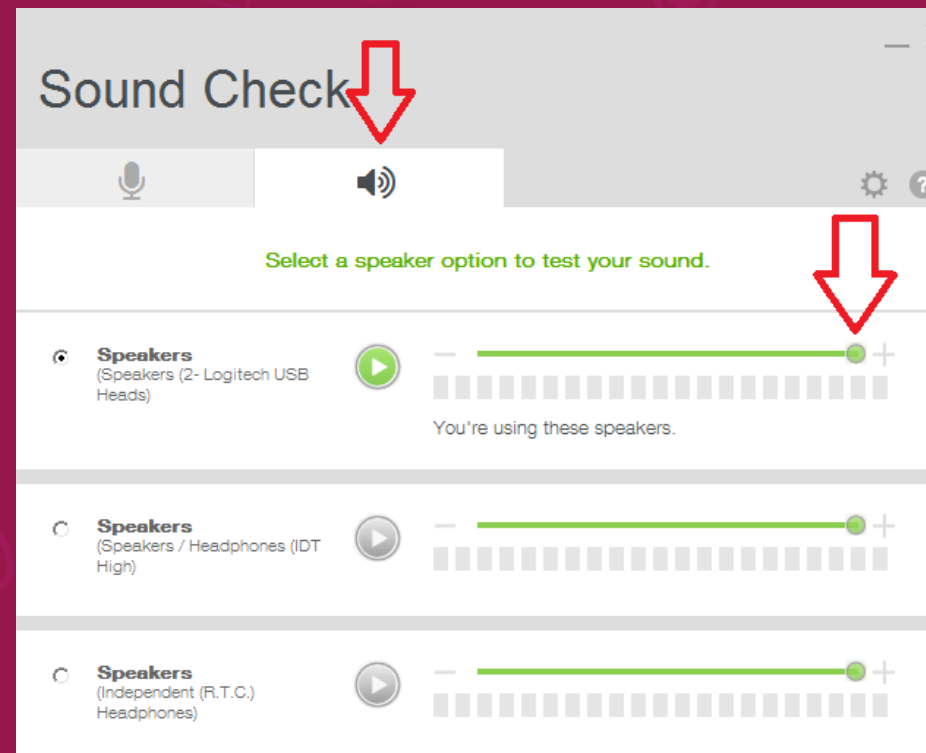
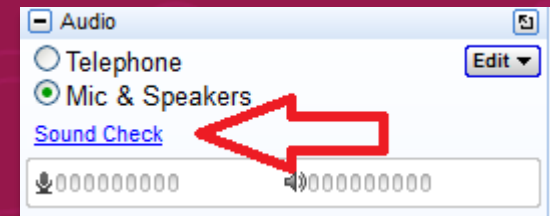


**At a glance:** Trusted for over 17 years, over 18,000 charities rely on our non-commercial online fundraising platform and more than 1.7 million Canadians have given using CanadaHelps. We have a spotless record for safe and secure payment processing & instant tax receipting.

# 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.



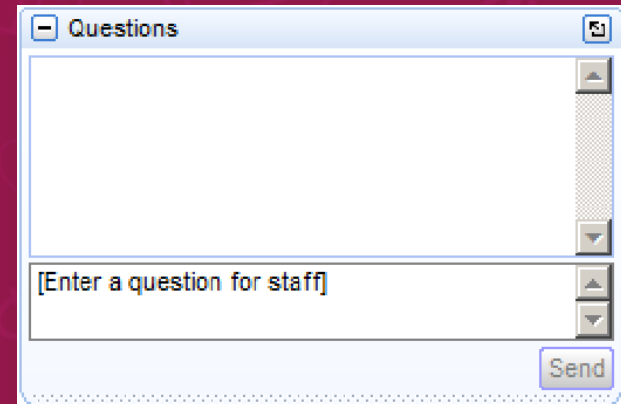
# Webinar Reminders

- 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



A screenshot of a web interface titled "Questions". It features a large text area for input, a smaller text area below it containing the placeholder text "[Enter a question for staff]", and a "Send" button at the bottom right. The interface has a light blue border and a small icon in the top right corner.

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

**Let's find out how.**

# You Will Need A CanadaHelps Account



**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!



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.



Want to use our Donate Now and P2P Campaign services? [Upgrade to a Full Fundraising Account Now](#)



# Quickly...

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.ORG

# Let's Dive In



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

The screenshot shows the 'Donate Now' section of a charity account on the Canada Helps.org website. The 'Donate Now' button in the top navigation bar is highlighted with a red box. Below the navigation bar, there are links for 'Custom Donate Now', 'Donate Now Link', 'Fundraise Now Link', and 'Donate Securities Link'. The main content area is titled 'Customizable Donation Forms' and includes a 'Create a New Form' button. The text explains that a Customizable Donation Form is used to accept donations online and provides three options for sharing it: embedding it on the website, adding a 'Donate Now' button, or getting the website URL. At the bottom, there are two tabs: 'Active(68)' and 'Deactivated(11)'.

Canada Helps.org giving made simple

Français Help 0 Giving Basket Jan Viernes ▾

Donate | Explore | Fundraise | Why CanadaHelps | Blog | For Charities

Home Profile **Donate Now** P2P Events Donations Funds Account Info

[Custom Donate Now](#) [Donate Now Link](#) [Fundraise Now Link](#) [Donate Securities Link](#)

### Customizable Donation Forms

[Create a New Form](#)

A Customizable Donation Form is a form that you can use to accept donations online. Once you've created your donation page, you have three options for sharing it. You can embed it directly on your website, link to it from your Donate Now button or share its URL.

**Embed the Form**

To embed the form on your website click "Get Embed Code" from the Actions column below. Then, copy and paste the code onto your website where you want your form to appear. Please note: It is recommended that donation forms be embedded on a secure page on your site.

[Learn More](#)

**Add a Donate Now Button.**

The button will link directly to your form. Choose from an array of Donate Now buttons in the Donate Now Link area, and then copy and paste the code onto your website.

**Get your donation form's website URL.**

Simply click "Get Link" from the Actions column below.

Active(68) Deactivated(11)



# Setting Up: Linked



**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



**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?



- 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?

Embed your  
forms: Donors  
never leave  
your site.



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



**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.**



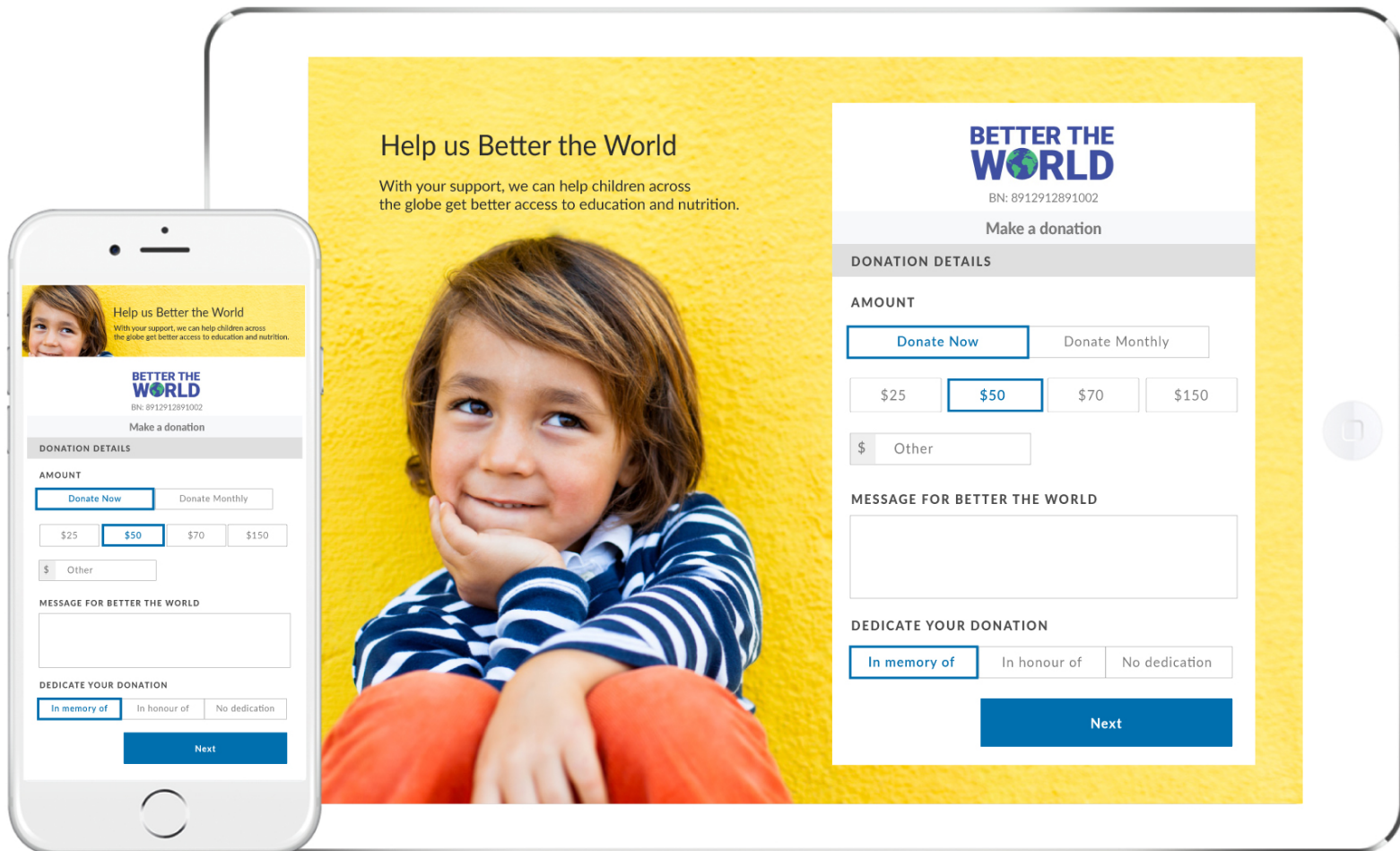
# Should I Link to the Form? Or Should it Live on my Website?



**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



**Help us Better the World**

With your support, we can help children across the globe get better access to education and nutrition.

**BETTER THE WORLD**  
BN: 8912912891002

Make a donation

**DONATION DETAILS**

**AMOUNT**

**MESSAGE FOR BETTER THE WORLD**

**DEDICATE YOUR DONATION**

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



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

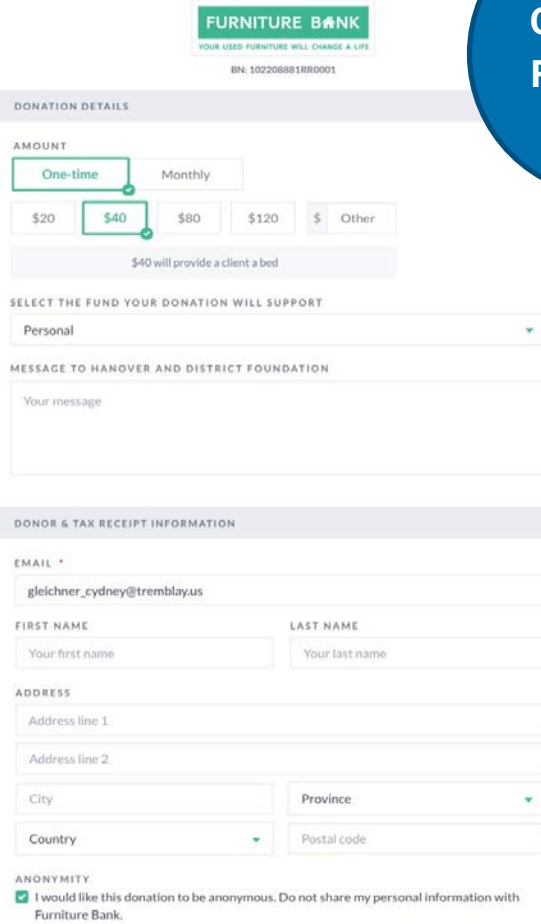
Then, select your form type.

The screenshot shows the 'New Customizable Donation Form' page on the Canada Helps.org website. The page has a header with the logo, navigation links (Donate, Explore, Fundraise, Why CanadaHelps, Blog, For Charities), and user information (Français, Help, Giving Basket, Jan Viernes). A secondary navigation bar includes Home, Profile, Donate Now (highlighted), P2P, Events, Donations, Funds, and Account Info. Below this is a blue bar with links: Custom Donate Now, Donate Now Link, Fundraise Now Link, and Donate Securities Link. The main content area has a 'Back to all pages' link and a 'Save' button. The 'FORM NAME' field is labeled 'New Form' with a note: 'Enter a page name. This will not appear to donors visiting your page'. The 'FORM TYPE' dropdown menu is open, showing options: Full Form, Select Form Type (highlighted), Full Form, Multi-Step Form, and One Page Form with Tribute First. To the right of the dropdown are expandable sections for 'General Settings' and 'Other Customizations'. At the bottom, there are expandable sections for 'Monthly Donation Amounts' and 'Custom Email Messages'.

# Custom Donation Form Types

Optimized  
Full Form.

- Clean Look
- Minimize Clicks



**FURNITURE BANK**  
YOUR USED FURNITURE WILL CHANGE A LIFE  
BN: 10220881RR0001

**DONATION DETAILS**

**AMOUNT**

☒ One-time ☐ Monthly

Other

\$40 will provide a client a bed

**SELECT THE FUND YOUR DONATION WILL SUPPORT**

Personal

**MESSAGE TO HANOVER AND DISTRICT FOUNDATION**

Your message

**DONOR & TAX RECEIPT INFORMATION**

**EMAIL \***

gleichner\_cydney@tremblay.us

**FIRST NAME** **LAST NAME**

Your first name Your last name

**ADDRESS**

Address line 1

Address line 2

City Province

Country Postal code

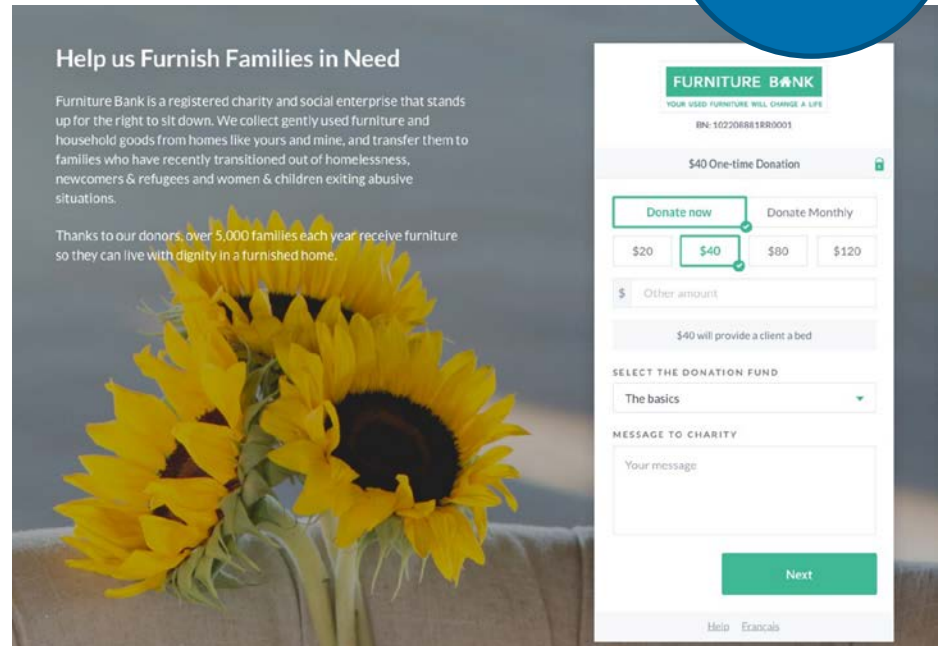
**ANONYMITY**

☒ I would like this donation to be anonymous. Do not share my personal information with Furniture Bank.

# Custom Donation Form Types

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

High Impact  
3-Step Form.



The screenshot shows a donation form for Furniture Bank. The background features a close-up of yellow sunflowers. The form is titled "Help us Furnish Families in Need" and includes a paragraph about the organization's mission. Below this, it states "Thanks to our donors, over 5,000 families each year receive furniture so they can live with dignity in a furnished home." The form is divided into three main sections: 1. Donation Type: A toggle switch for "Donate now" (selected) and "Donate Monthly". 2. Amount: Radio buttons for \$20, \$40 (selected), \$80, and \$120. Below this is a text input field for "Other amount" and a statement "\$40 will provide a client a bed". 3. Donation Fund: A dropdown menu labeled "SELECT THE DONATION FUND" with "The basics" selected. Below this is a text area for "MESSAGE TO CHARITY" with the placeholder "Your message". At the bottom right is a green "Next" button. At the bottom left are links for "Help" and "FAQs".

Help us Furnish Families in Need

Furniture Bank is a registered charity and social enterprise that stands up for the right to sit down. We collect gently used furniture and household goods from homes like yours and mine, and transfer them to families who have recently transitioned out of homelessness, newcomers & refugees and women & children exiting abusive situations.

Thanks to our donors, over 5,000 families each year receive furniture so they can live with dignity in a furnished home.

**FURNITURE BANK**  
YOUR USED FURNITURE WILL CHANGE A LIFE  
BN: 102208818R0001

\$40 One-time Donation

Donate now Donate Monthly

\$20 \$40 \$80 \$120

\$ Other amount

\$40 will provide a client a bed

SELECT THE DONATION FUND  
The basics

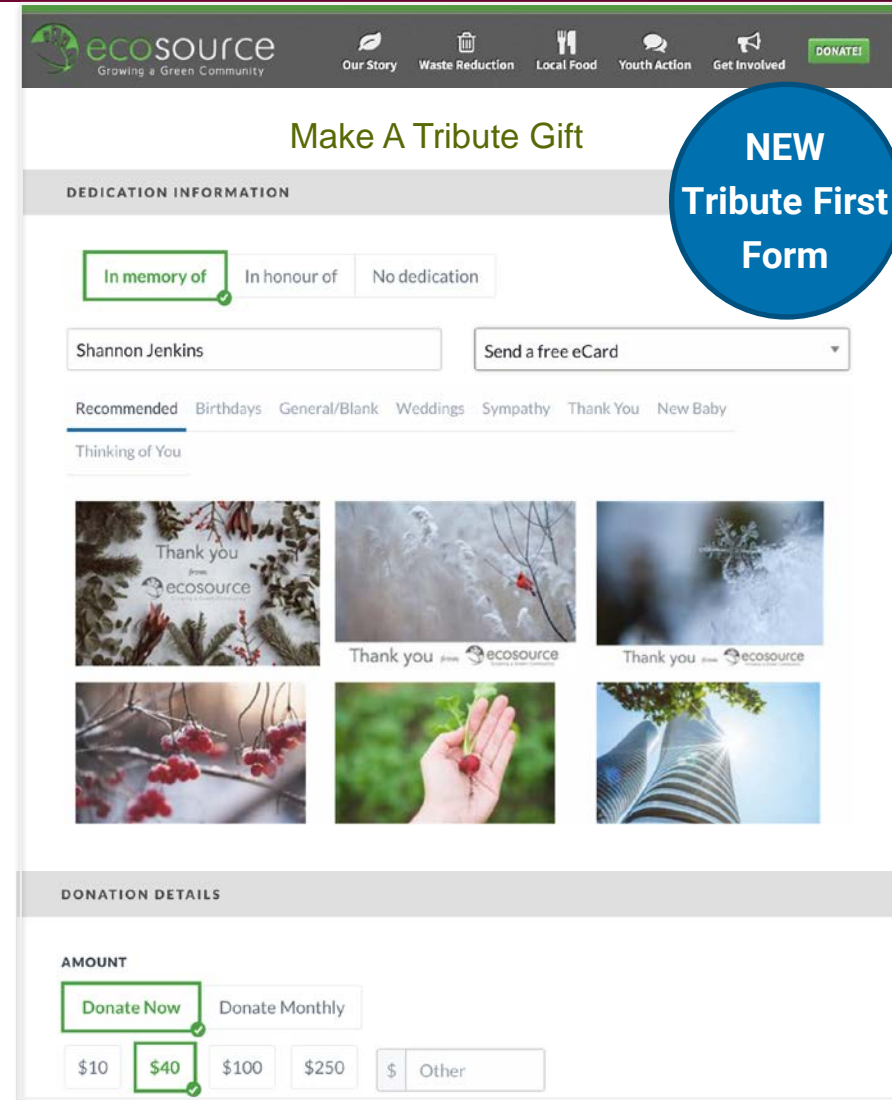
MESSAGE TO CHARITY  
Your message

Next

Help FAQs

# Custom Donation Form Types

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



The screenshot shows the 'Make A Tribute Gift' form on the ecosource website. The form is titled 'Make A Tribute Gift' and has a 'DEDICATION INFORMATION' section. In this section, the 'In memory of' option is selected, and the name 'Shannon Jenkins' is entered. There is a 'Send a free eCard' dropdown menu. Below this, there are tabs for 'Recommended', 'Birthdays', 'General/Blank', 'Weddings', 'Sympathy', 'Thank You', and 'New Baby'. The 'Thank You' tab is selected, showing a grid of six custom e-card designs. The 'DONATION DETAILS' section at the bottom has an 'AMOUNT' section with 'Donate Now' selected and a dropdown menu showing '\$40' as the chosen amount. Other options include 'Donate Monthly' and a list of preset amounts: '\$10', '\$40', '\$100', '\$250', and '\$ Other'.

**NEW Tribute First Form**

**ecosource**  
Growing a Green Community

Our Story Waste Reduction Local Food Youth Action Get Involved **DONATE!**

## Make A Tribute Gift

**DEDICATION INFORMATION**

☒ In memory of ☐ In honour of ☐ No dedication

[Recommended](#) [Birthdays](#) [General/Blank](#) [Weddings](#) [Sympathy](#) [Thank You](#) [New Baby](#)

Thinking of You

Thank you from ecosource

Thank you from ecosource

Thank you from ecosource

Thank you from ecosource

Thank you from ecosource

Thank you from ecosource

**DONATION DETAILS**

**AMOUNT**

☒ Donate Now ☐ Donate Monthly

# Creating and Editing Your Form: A Map



**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**

▼ General Settings

▼ Other Customizations

▼ One-time Donation Amounts

▼ Monthly Donation Amounts

▼ Custom Email Messages

▼ Brand Form

▼ Brand eCards

▼ Analytics

Save

Cancel

Save

Save & View



# Brand Your Form!

Brand Form

Save

## GENERAL

These branding options will appear on your Customizable Donation Form page when you one, link to it (e.g. going to [www.CanadaHelps.org/dn/\[PageID\]](http://www.CanadaHelps.org/dn/[PageID])) and two, when you embed it directly on your website, to view sample of your general branding options.

## BACKGROUND IMAGE

Choose File No file chosen

Upload File

[Image Size Guidelines](#)

## BACKGROUND COLOUR

Select Colour

## BUTTONS AND LINKS

Select Colour

## TITLE BAR TEXT

Select Colour

## TITLE BAR BACKGROUND

Select Colour

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

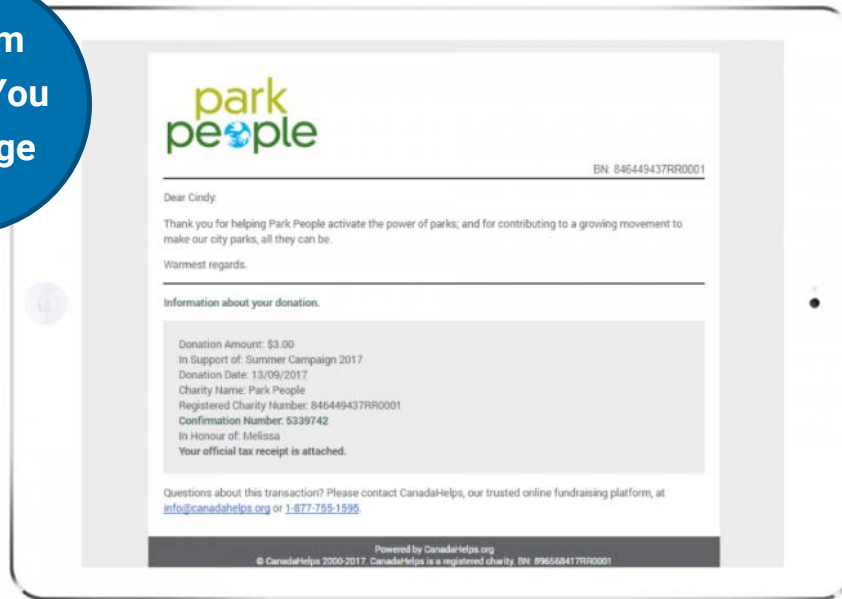
**In the Brand Form section, you will be able to customize your form's images and text.**

**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!

Custom  
Thank You  
Message



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?

- 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

## FUND ?

No preset fund, let donor choose (English)

Aucun fonds présélectionné, au donateur de choisir (français)

Save

## FUNDRAISING PROGRESS

☒ Disable fundraising progress

Enter a fundraising Goal:

\$ fundraising goal

Enter amount raised offline:

\$ offline amount

## DONATION OPTIONS

- ☒ One-time & Monthly donations  
☐ One-time donations  
☐ Monthly donations

## REDIRECT URL ?

Enter a URL (i.e. <http://myorg.org/thanks.html>), and we will redirect the donor back to your site once they've completed their donation.

Enter a redirect url (English)

Enter a redirect url (French)

## IN MEMORY/IN HONOUR

- ☒ Allow donors to designate their donation in memory or in honour of someone  
☐ Allow donors to request that the charity send a card by postal mail

# Pre-Set Donation Amounts



**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!**

## DONATION DETAILS

### ONE-TIME DONATION

Your donation of \$100 will provide school supplies for 5 children!

You can also make a monthly donation

### FUND

Area of Greatest Need ▼

### MESSAGE FOR CANADAHELPS

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

# Using Google Analytics?

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

## ^ Analytics

### GOOGLE ANALYTICS ?

### GOOGLE TAG MANAGER ?

# Want to Edit A Form You Are Already Using?



**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!



## 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%, including credit card fees.**

# Questions or Comments?

## Get in touch!



Jacob O'Connor  
Charity Engagement at CanadaHelps  
[jacobo@canadahelps.org](mailto:jacobo@canadahelps.org)



@CanadaHelps  
@CharityLifeCa





# 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.