

Parts Guide

2/21/2018 Blackbaud NetCommunity Spark Parts US

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In *Parts*, you can create, edit, and delete content for your website. For example, to include your organization's mission statement on your site, you can create a part in *Parts* and write the statement. You can also include your organization's logo in the part. Other examples of parts include navigation buttons, profile forms, event registration forms, and frames. After you save a part, you can display it on multiple web pages. This section describes how to create parts for your website.

Note: Content does not appear on the website until you add the part to a web page in *Pages & templates*. For information, see the *Website Design Guide*.

Create and Edit Parts

When you include a part on multiple web pages, you can edit and update it once for all pages. To ensure a new part's appearance, such as font size and style, is consistent with the rest of your website, you can copy an existing part. This retains the bulk of information required to create content.

The procedures in this section describe the tabs you use to create and edit parts. For information about how to design a specific part, see the section about that part type.

➤ Create a part

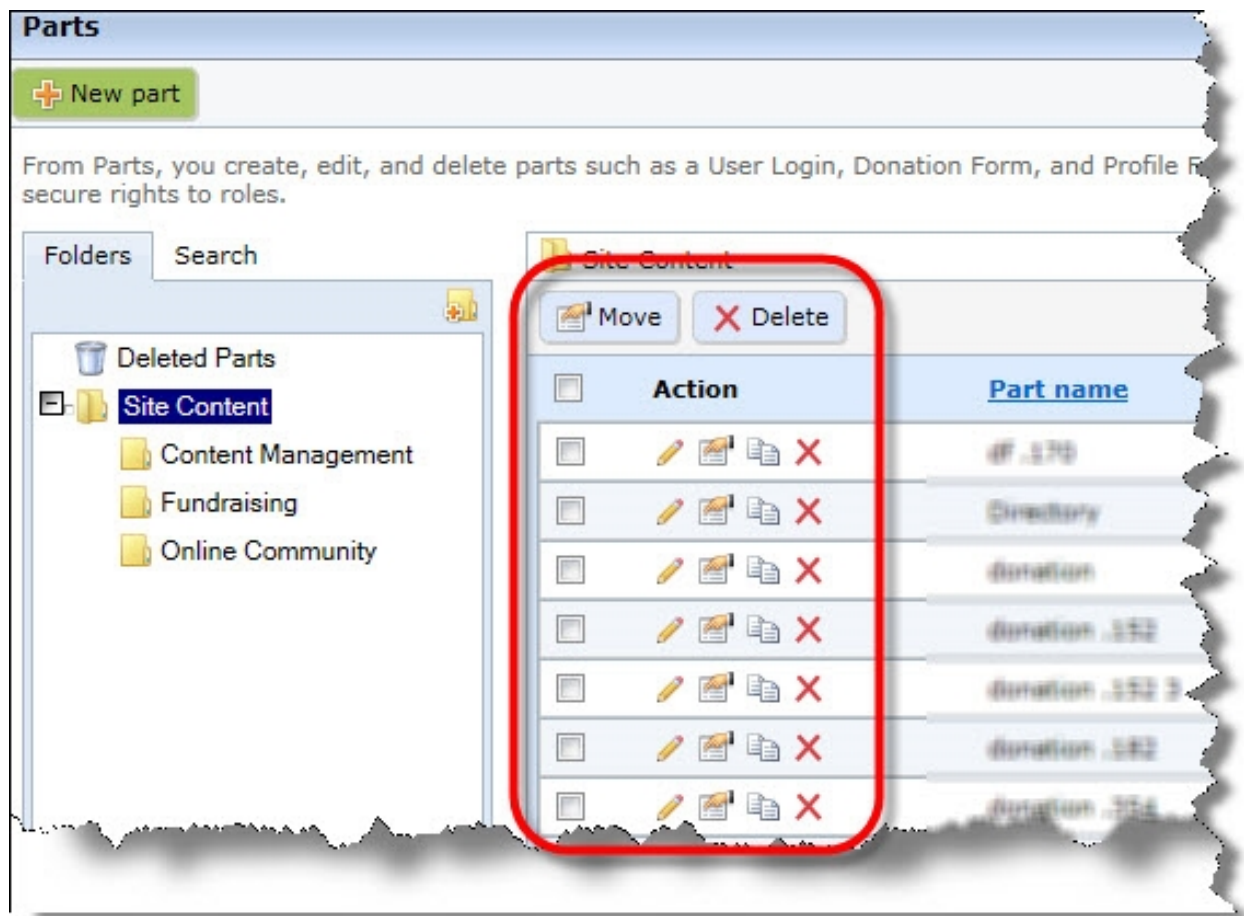
When you host multiple sites, you can create parts for individual sites. To do this, log in to the site and create the part. For more information, see the *Administration Guide*.

1. From *Site explorer*, click **Parts**. *Parts* appears.
2. Click **New part**. The New Part screen appears.
3. On the Properties tab, enter basic information that defines the part. For example, select the part type and enter a name for the part. For more information, see [Properties Tab on page 9](#).
4. Select the Targeting & Security tab. In the grid, assign view, edit, delete, and change security rights for users and roles. For more information, see [Targeting & Security Tab on page 11](#).
5. Click **Next**. The Design tab appears. For more information about the Design tab, see [Design Tab on page 11](#). For information about how to design a specific part, see the section for that part type.
6. Click **Save**. You return to *Parts*.

➤ Edit a part

To search for an existing part to edit in *Parts*, use the filter tools. For example, select a part type in the **Filter by Type** field or enter a full or partial name in the **Filter by Name** field.

1. From *Site explorer*, click **Parts**. *Parts* appears.



2. When you edit parts, you can perform the following actions:
 - To edit a part's design, click **Click here to edit this part**. The Edit Part screen appears on the Design tab. For information about how to design a specific part, see the section for that part type. For information about the Design tab, see [Design Tab on page 11](#).
 - To edit a part's properties, click **Click here to view/edit this part's properties** under **Action**. The Edit Part screen appears on the Properties tab. For information about part properties, see [Properties Tab on page 9](#).
 - To create a part based on an existing part, click **Click here to copy this part** under **Action**. The Copy Part screen appears. In the **New Part name** field, enter a new name and click **Next**. The Edit Part screen appears so you can edit the new part.

Note: If the original part contains tags, the copy inherits the tags. From the Tags tab, you can modify the copied tags.

Note: Blackbaud NetCommunity Spark does not support the Tags tab.

- To move a part to another folder, select the checkbox beside the part and click **Move**. The Move selected items screen appears for you to select a different folder.
- To delete a part, select the checkbox beside the part and click **Delete**. A message appears to confirm you want to delete the data. When you do this, the part is available for you to restore from the Deleted Parts folder.

Warning: To prevent you from inadvertently removing active content from your website, you can no longer delete parts when they are associated with web pages. When you attempt to delete a part that is associated with a single site, or shared across multiple sites, a message appears to inform you that you cannot remove it because it exists on a page. To identify the pages where the part appears, select the part's Usage tab. For information about the Usage tab, refer to [Usage Tab on page 16](#).

3. Click **Save**. You return to *Parts*.

Properties Tab

On the Properties tab, you enter basic information that defines the part.

➤ Define part properties

1. Select the Properties tab of a part.

The screenshot shows the 'Properties' tab for a part. The 'Part Type' is set to 'Donation Form' and the 'Part Name' is 'Alumni Donation'. The 'Part Description' field is empty. The 'Target Language' is set to '< All >'. There are two checkboxes: 'Test Mode' and 'Scheduled Publishing', both of which are checked. Below these, there are fields for 'Publish Date' (4/8/2010) and 'Expiration Date' (4/9/2010). A tooltip explains that 'Test Mode' allows for design, styling, and testing without saving or processing data. Another tooltip explains that 'Scheduled Publishing' allows for scheduling a begin and end date for displaying the part on a page.

2. In the **Part Type** field, select a part type, such as "Formatted Text and Images." This is the type of content to include on the web page. After you save the part, you cannot change the part type.

After you save a part, you can view its ID in the **Part ID** field. You can use this ID to identify the part in a URL for a traffic measurement service, such as *Google Analytics*. For more information, see the *Administration Guide*.

3. In the **Part Name** field, enter a name such as “Mission Statement” to allow users to quickly identify the information in *Parts*. The name is for internal use and does not appear on the website.
4. In the **Part Description** field, enter any additional information to identify the part.
5. In the **Target Language** field, select a language for content in the part. If the website user’s primary language for the Internet browser is selected to the same language in the field, the part appears on the web page. If the browser is selected to a different language, the part does not appear. If the part applies to all languages, leave the default “<All>” in the field.

The languages that appear in the drop down are those selected in the **Language** box on the Settings tab in *Sites & settings*. For more information, see the *Administration Guide*.

6. To design, style, and test a part on your website without creating transactions, generating emails, or communicating in any way with Blackbaud Services or The Raiser’s Edge, select **Test Mode**. For example, you can complete the fields on a donation form to ensure the confirmation page is styled and working properly. Although you submit the donation and receive a confirmation, a transaction does not appear on the NetCommunity page.

The **Test Mode** checkbox appears on the Payment, Donation Form, and Event Registration Form parts. Only users with supervisor rights can view parts in Test mode.

Note: Use Test mode to verify the user’s experience, *not* to test data processing. Test mode does not validate credit card numbers and merchant accounts.

7. To make the part available within a certain time frame, select **Scheduled Publishing**. When you select this checkbox, the date fields are enabled.

Note: If you do not select **Scheduled Publishing**, no time limits exists for the part.

- a. In the **Publish Date** field, enter the date and time the part first becomes available on your site.
- b. In the **Expiration Date** field, enter the date and time the part becomes unavailable on your site.

If an expired part exists on a live web page on your site, the part does not appear. The other parts on the page dynamically fill the space where the expired part previously appeared.

Note: When you host multiple sites and edit part properties, the **Assign to site** field appears so you can move a part from its current site to another site. If the part is in use on a web page on the source site, it continues to appear on that site. However, the part is now associated with the target site and its security. When you move a part, some parts require you to configure options again when you edit the part’s design after the move. For example, the eCards part requires you to select an eCard template before you save it. During this time, there are no disruptions to the part on your site. It maintains the original configuration until you edit the part.

8. If you plan to use the part on a site that is a template for multiple sites, you can create a single instance of the part when you copy the site so you only have to make changes to one instance. To create a single instance, select **Share part across sites**. To limit the users who can edit the shared content, assign security rights from the Targeting & Security tab. For information about how to copy a site, see the *Administration Guide*. For information about the Targeting & Security tab, see [Targeting & Security Tab on page 11](#).

Note: This option appears for the Formatted Text and Images, Slideshow, and Unformatted Text parts.

Note: Blackbaud NetCommunity Spark does not support the Slideshow part.

When you select **Share part across sites**, the **Allow users who do not have permission to edit content to create a local copy** checkbox appears. If you select this checkbox, users without permission to edit shared content can copy it.

9. Click **Next**. The Design tab appears. For more information about the Design tab, see [Design Tab on page 11](#). For more information about how to design a specific part, see the section for that part type.

Design Tab

The Design tab appears after you save a part's properties. On this tab, you set parameters defining the part's content, appearance, and processing. For example, on some parts you define required fields, allowable payment options, and how users navigate away from the part. For more information about the Design tab for a particular part, see the section for that part type.

Targeting & Security Tab

On the Targeting & security tab, you assign website security rights for users and roles. You can assign view, edit, delete, and change security rights.

By setting view rights, you target website content to only certain users. For example, on a Formatted Text and Images part, you can assign view rights to the Board Members role so only users in that role view the part on a web page.

Users with rights to edit and delete content can help manage the website. For example, on an Event Registration Form part, users with edit rights can update last year's golf tournament information with this year's information.

Users with change security rights have view, edit, and delete rights to the content. They can also change security on this tab. Only users with supervisor rights should have rights to change security.

➤ Select website security permissions

Follow this procedure for information about the Targeting & security tab on pages, templates, images, and other areas in the program.

1. On a part, select the Targeting & security tab. A grid appears that lists the Everyone role in the first row.

Targeting & security

To target this content to specific users, assign the appropriate permissions to roles.

Copy permissions

Action	User/Role Name	View	Edit	Delete	Change Security
	Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
X	Site Administrators	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
X	Content Authors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

+ Add users and roles

Note: You cannot edit a checkbox that you select for the Everyone role. All users inherit permissions from the Everyone role.

- To apply the same security permissions another part uses, click **Copy permissions**. The Select a Part screen appears to select the part.

When you copy permissions, you overwrite the current security settings on the Targeting & Security tab.

Tip: You cannot copy permissions from a different task. For example, when you select to copy permissions from a part, you must select permissions from another part. You cannot select permissions from a page or template. In addition, images do not support copying permissions.

- Select the part and click **Select** to return to the Targeting & security tab. The users and roles appear in the grid. You can adjust the permissions as necessary.
- To adjust the permissions for users and roles for this part, select **Add users and roles**. The Create new security permissions screen appears.

Create new security permissions

Select users and roles

To add users or roles, move them from **Available** to **Selected**. Up to 100 users and roles appear in alphabetical order. To search for additional users and roles, use the **Filter** field.

Filter:

Filter by type:
Both ▼
Available:

EE users
Email link
Gabriel
ImageOnly
Katie
Matthew
Members

Add >
Add all >>
< Remove
<< Remove all

Selected:

Assign permissions

View	Edit	Delete	Change Security
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Tip: When you create or edit a User Login part, you select the roles to assign to a user who signs up on that part for your website. This is commonly the way users become a part of the roles you assign permissions for on this screen. For more information about role assignments on the User Login part, see [User Login on page 157](#).

- a. In the **Filter** field, enter the first letter of the user or role to include.

Note: The **Available** box displays 30 users and roles in alphabetical order. Use the **Filter** field to find additional users and roles that do not appear in the box.

- b. Locate the user or role, and click **Add**. The user appears in the **Selected** box.
To select multiple users or roles, press **SHIFT** while you select the multiple users, and then click **Add all**. The users appear in the **Selected** box.
- c. Under **Assign permissions**, grant the users and roles view, edit, delete, and change security permissions.
- d. Click **OK**. You return to the Targeting & security tab. The users and roles appear in the grid.

5. To apply the permissions to the part, click **Save**. You return to *Parts*.

For more information about security, see the *Users & Security Guide*.

Parts That Require User Login Information

Users must log in to view some parts on your website. The following parts require user name and password information before website users can access them.

- Change User ID/ Password
- Chapter Links
- Email Forwarding Form
- My Friends
- Profile Display
- Profile Form
- Targeted Content
- Transaction Manager
- User Education Profile Form
- User Interests Form
- User Link Module
- User Networking Manager
- User Photos Form

Other parts, such as the Personal Page Manager part, allow any user to access some of the part but require user name and password information to view the rest. Parts, such as the Menu and Weblog parts, do not require any login information.

Language Tab

Use the Language tab to rename labels, headings, and other text on your web pages. For example, if you do not want the anonymous gift checkbox to display **I prefer to make this donation anonymously** on the donation page, you can change the text to **Anonymous gift**. For the Tag Display part, you can enter the header that appears before the list of tags. You can also choose the punctuation mark, or delimiter, that separates entries in displays that include only tags on the selected page.

Note: Blackbaud NetCommunity Spark does not support the Tag Display part.

You can also enter localized text in another language for the items that appear on the Language tab. For example, you can create a Donation Form part for English and enter localized text for Spanish. On the Language tab, you enter the localized text for each language. You use this tab in combination with other features to create international pages for your website.

➤ Rename and localize text

1. Select the Language tab of a part.

Tip: The Language tab appears on the Donation Form, eCards, Giving Search, Language Selector, Payment, Tag Display, Transaction Manager, User Email Preferences Form, and User Login parts.

Language

Specify any part text to be replaced with alternate text for a specific language.

Category: Language:

Item name	Item type	Default text	Text
Address Lines	Field label	Address lines:	<input type="text" value="Address lines:"/>
Country	Field label	Country:	<input type="text" value="Country:"/>

2. In the **Category** field, select the area of the part to rename text for.
 3. In the **Language** field, select the language to localize.
You select the languages that appear in the **Language** box on the Settings tab in *Sites & settings*.
 4. Refer to the **Item name** column to enter text in the **Text** column. This text replaces the default text.
 - Enter the text to replace the default label or heading. For example, for the Anonymous gift checkbox item, you do not want the checkbox to display **I prefer to make this donation anonymously** on the web page. In the **Text** column, enter "Anonymous gift" to change the name of the checkbox.
 - Enter localized text for selected languages. For example, to create a Spanish web page, you can change the text to "Donación anónimo." In the **Language** field, select the next language to localize. When you toggle the **Language** field between multiple languages, the localized text appears in the **Text** column for each language.
- For more information about multiple languages on your website, see [Add Localized Text For Web Pages on page 15](#).
- For the Tag Display part, you can enter a new delimiter to separate tag entries.

Note: The delimiter separates entries in tag displays that show only tags for the parts on a page. For tag displays that include all tags in use, entries appear on separate lines by default and the delimiter does not appear. To add a delimiter to a tag display for all tags, you must modify the BBTagDelimiterAll element under Tag Display for the appropriate style sheet. For information about how to manage style elements, see the *Website Design Guide*.

Add Localized Text For Web Pages

You use the Language tab in combination with other features to create international pages for your website. You can create localized text for pages on your website in two ways. You can enter the localized text to appear on the Language tab and create the Language Selector part. The Language Selector part allows the website user to render the localized text on the web page. You can also create a part specifically for a language. If a website user's primary language for the Internet browser is the same as the part, the part appears on the web page.

➤ Implement multiple languages on your website

1. On the Settings tab in *Sites & settings*, select the languages to associate with your website. For example, if your website audience includes Spanish and French users, select **Español (Mexico)** and **français (Canada)** in the **Language** box. For more information, see the *Administration Guide*.
2. Create a part specifically for a language. You can create localized pages in two ways.
 - On the part's Properties tab, in the **Target language** field, select the language for the part. If the website user's primary language for the Internet browser is selected to the same language in the **Target language** field, the part appears on the web page. If the browser is selected to a different language, the part does not appear. If the part applies to all languages, leave the default "<All>" in the field. For more information, see [Properties Tab on page 9](#).

OR

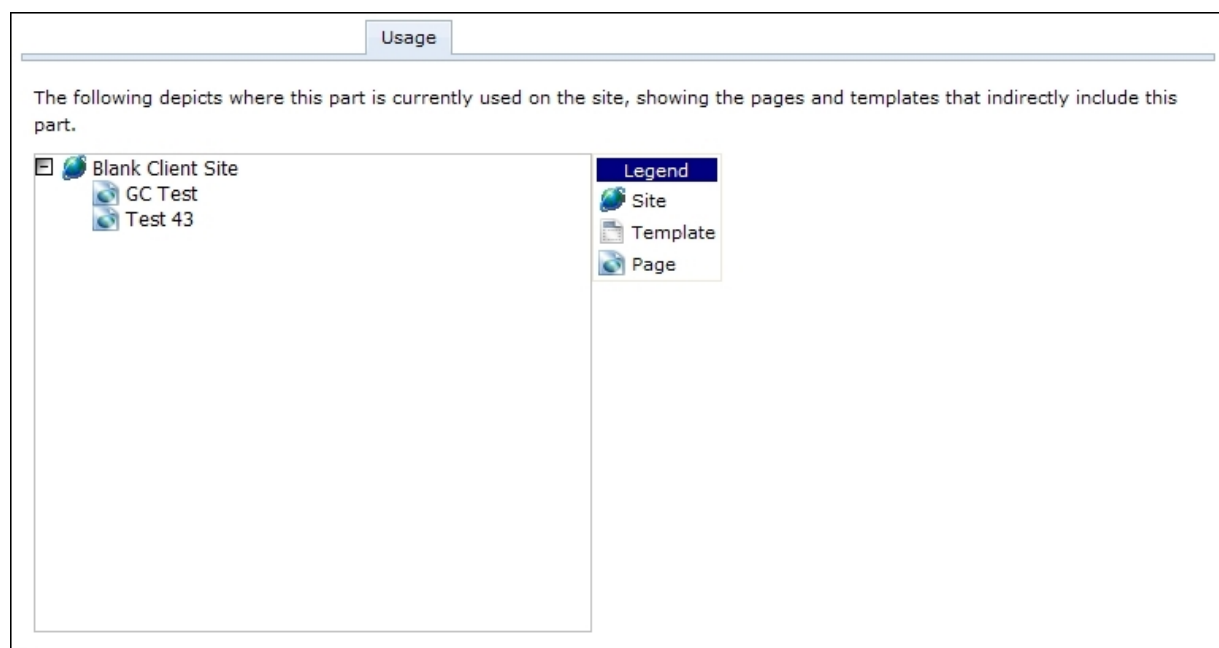
- On a part's Language tab, in the **Language** field, select the language to localize. In the **Text** column, enter the localized text for the web page. Create the Language Selector part. This part displays a **Language** drop down field on your website. A website user selects a language preference from the field on the web page. After the user selects the language, the page renders the localized text. For more information, see [Language Tab on page 14](#) and [Language Selector on page 1](#).

Note: Blackbaud NetCommunity Spark does not support the Language Selector part.

3. Add all applicable parts to a template or page in *Pages & templates*.

Usage Tab

After you save a part, the Usage tab appears. This tab displays the layouts, templates, and web pages that use the part. The information is for informational purposes only. If the part is not used, a "This part is not being used" message appears.



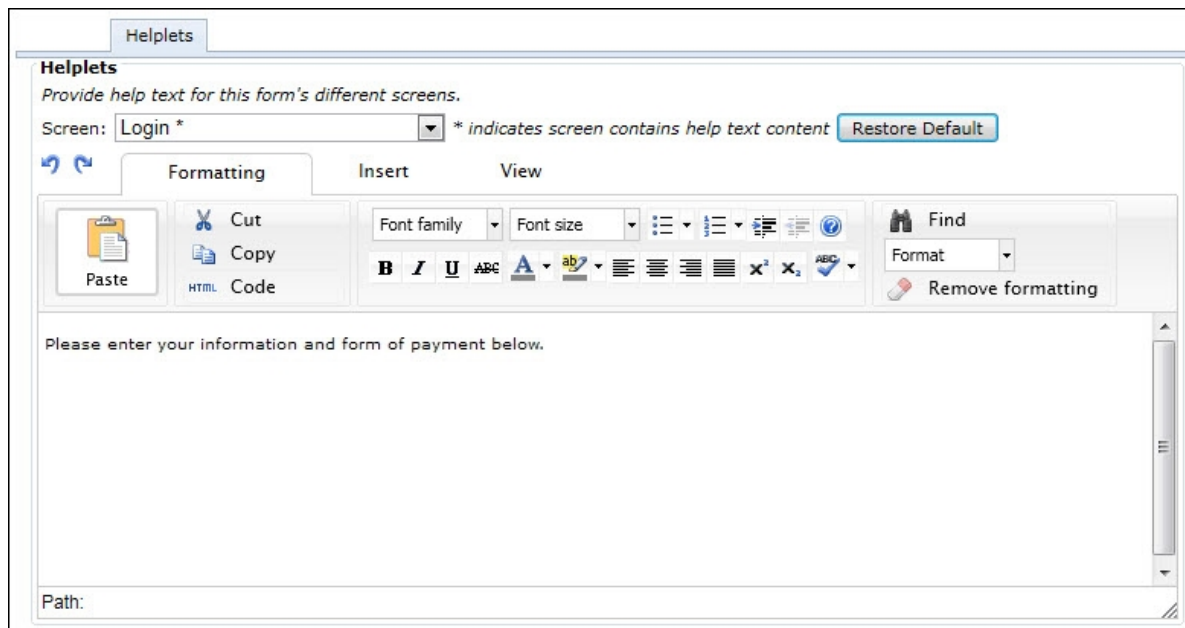
Helplets Tab

On the Helplets tab, you can add custom text to help users understand the features of certain parts on your website. For example, on the Personal Page Manager part, you can provide instructions for the various Dashboard buttons.

Tip: The Helplets tab appears on the Event Registration Form, Fundraiser, Payment, and Personal Page Manager parts.

> Add helplets

1. Select the Helplets tab.
2. In the **Screen** field, select the screen to add help text for.



Note: Some screens contain default helplet text. You can use the text provided or enter different text. If you overwrite the default text, you can click **Restore Default** to restore the original text.

3. In the box, enter the text to appear on the part. To format the content's appearance and layout, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.
4. To create help text for another screen, select it in the **Screen** field. The program automatically saves your changes, and an asterisk appears beside the screens in the field that have help content.

Content Approval Tab

Note: Blackbaud NetCommunity Spark does not support the Content approval tab.

When you design a Formatted Text and Images part or Formatted Text and Images (Secured) part, the Content Approval tab appears. On this tab, you select the approval status of the part and view its status within the selected workflow and its approval history. If you have rights to manage workflows, you can also assign the part to a different workflow.

When you revise a published part, the program automatically archives its earlier version. From the Content Approval tab, you can view its previously published versions. If you have rights to approve content, you can also restore the part to an earlier version.

➤ Select the workflow and approval status of a part from its Content Approval tab

1. On the Edit Part screen, select the Content Approval tab.


Content Approval

Set approval status and workflow for this part.

Approval Status: Draft ▼

Workflow: Default for FT&I * ▼ * denotes default workflow

Activity:

Action	Version	Status	Status Updated On	Status Updated By
	1	Draft	8/6/2009 3:41:50 PM	Supervisor
1 version meets selected criteria				

2. In the **Approval Status** field, select the part's status in the workflow.
 - When you first create or edit a part, the approval status is "Draft" until you complete its design and submit it for approval. Until the part is ready for approval, select this account status. In the **Activity** grid, parts with this status display "Draft" in the **Status** column. Parts with this status appear in *Approvals* and on the Approvals tab of the selected workflow.
 - When you complete the part's design and content, select "Ready for Approval" to submit it for approval. Users in the approval role for the workflow can review parts with this status and select whether to approve the content to appear on the website. In the **Activity** grid, parts with this status display "Pending" in the **Status** column. In *Approvals* and on the Approvals tab of the selected workflow, parts with this status display an approval status of "Pending."
 - To approve the part and its content, users in the approval role for the workflow select "Publish." Parts with this status appear on your website. In the **Activity** grid, parts with this status display "Published" in the **Status** column.
 - To reject the part and its content, such as if the content contains error or is inappropriate for your website, users in the approval role for the workflow select "Reject."
3. If you have rights to manage workflows, the **Workflow** field appears. Select the workflow to apply to the part. The workflow determines the users who review the part for approval.

Note: When you create a workflow in *Workflows*, you can select whether it is the default workflow for the selected part type. When you design a part and select its workflow in the **Workflow** field, an asterisk (*) appears next to the default workflow. For information about how to create a workflow, see the *Administration Guide*.

4. In the **Activity** grid, view the recent approval activity for the part, including its approval status and the date and owner of the more recent approval status update.

To view the part and its content, such as for review and approval, click **Click here to view this version** in the **Action** column. The part and its content appears. To return to the Content Approval tab, click **Close**.

To compose and send an email message to the most recent person to update the status of a draft or pending part, click **Click here to send email** in the **Action** column.
5. To continue to design the part and its content, select the Design tab. For information about how to design the Formatted Text and Images or Formatted Text and Images (Secured) part, see [Formatted Text and Images on page 101](#).

To return to *Parts*, click **Save**.

➤ Restore a published part to an archived version

When you revise a published part, the program archives its earlier version. On the Content Approval tab, the **Status** column displays “Archived” for earlier published versions of the part. From the Content Approval tab, users in the content approval role can restore the part to an earlier archived version.

1. On the Edit Part screen, select the Content Approval tab.

Action	Version	Status	Status Updated On	Status Updated By
	4	Published	4/4/2008 8:44:31 PM	supervisor
	3	Archived	4/4/2008 8:44:31 PM	supervisor
	2	Archived	4/4/2008 8:44:18 PM	supervisor
	1	Rejected	4/4/2008 8:43:45 PM	supervisor

2. In the grid, determine the version of the part to restore. To view the part and its content for an earlier version, click **Click here to view this version** under **Action**. The part and its content for that version appears. To return to the Content Approval tab, click **Close**.
3. Next to the version to restore, click **Click here to restore this version** under **Action**. A message appears to confirm the restoration of the version.
4. Click **OK**. You return to *Parts*.

Tags Tab

Note: Blackbaud NetCommunity Spark does not support the Tags tab.

On the Tags tab, you enter keywords or phrases to identify a part's content. You can also associate user interests with the part. When the part is on a web page with a Tag Display part, its tags and user interests appear as hyperlinks. Users can click the links to access similar content from a list of the web pages that contain parts associated with the tags and user interests. For information about how to display tags as hyperlinks, see [Tag Display on page 1](#).

➤ Add tags

1. Select the Tags tab.

Tags

Tags are keywords that describe the content on parts and allow you to link to similar content. The Search part uses tags when it searches your website. The Suggested Content and Tag Display parts use tags to link to similar content on your website.

Add tag:
 Add

Existing tags and interests

Tags currently attached to this part:

☐ Include on Suggested Content parts

To make this part eligible to appear on a Suggested Content part, select this checkbox. Suggested Content parts search for parts with similar tags and interests and then link to the pages with the closest matches.

- To view the tags and user interests, click **Existing tags and interests**. Links appear for existing tags and user interests.

Note: A number beside a tag or user interest indicates how many parts use it. This information also appears in autocomplete text in the **Add Tag** field.

Add tag:
 Add

Existing tags and interests

Click the tags and interests to add to this part.

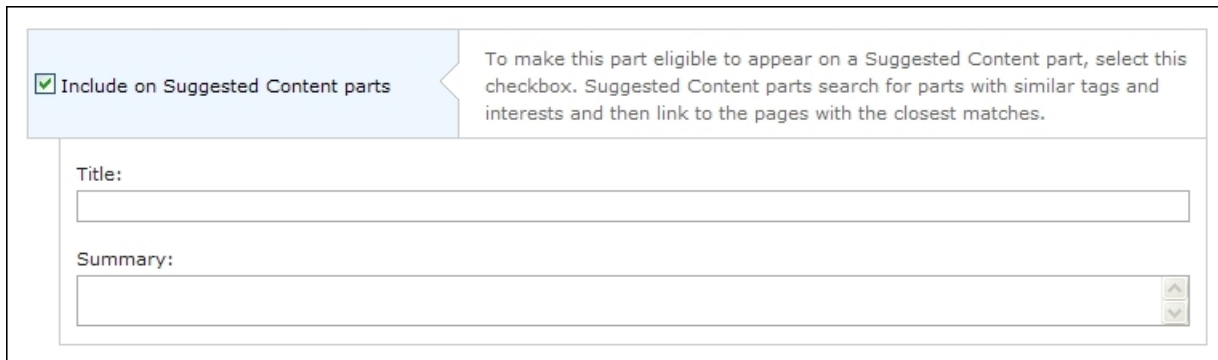
[Advocacy](#)
[Basketball \[Interest\]](#)
[Biking \[Interest\]](#)
[Cards \[Interest\]](#)
[Community](#)
[Contemporary art \[Interest\]](#)
[Cooking \[Interest\]](#)
[Cricket \[Interest\]](#)
[Donate](#)
[Events](#)
[Fishing \[Interest\]](#)
[Football \[Interest\]](#)
[Gardening \[Interest\]](#)
[Get Involved](#)
[Giving](#)
[Golf \[Interest\]](#)
[Horseback riding \[Interest\]](#)
[Local\(1\)](#)
[Membership](#)
[Multimedia](#)
[News](#)
[Newsletter](#)
[Outdoor activities \[Interest\]](#)
[Photography \[Interest\]](#)
[Photos](#)
[Profile](#)
[Recent Events](#)
[Rugby \[Interest\]](#)
[Sailing \[Interest\]\(2\)](#)
[Soccer \[Interest\]](#)

Tags currently attached to this part:

- To associate existing tags and user interests with the part, click the links. The items appear under **Tags currently attached to this part**.
- To create a tag, enter a word or phrase in the **Add tag** field and click **Add**. The tag appears under **Tags currently attached to this part**.

Note: To save data entry time, the program uses autocomplete to suggest existing tags from the Site Tags code table. When you add tags, the program adds them to the code table. For information about how to manage the Site Tags code table, see the *Administration Guide*.

- To remove a tag or user interest, click the “x” beside it under **Tags currently attached to this part**.



The screenshot shows a form section for 'Include on Suggested Content parts'. On the left, there is a checkbox labeled 'Include on Suggested Content parts' which is checked. To the right of the checkbox is a text box containing the instruction: 'To make this part eligible to appear on a Suggested Content part, select this checkbox. Suggested Content parts search for parts with similar tags and interests and then link to the pages with the closest matches.' Below the checkbox and text box are two input fields: 'Title:' and 'Summary:'. The 'Title:' field is a single-line text box. The 'Summary:' field is a multi-line text box with a vertical scrollbar on the right side.

- To allow Suggested Content parts to link to the part, select **Include on Suggested Content parts**. The Suggested Content part searches for parts with matching tags and user interests to recommend content to website users. For information about the Suggested Content part, see [Suggested Content on page 1](#).
- In the **Title** field, enter a header to display on a Suggested Content part when it recommends the part. The header links users to the part's web page.
- In the **Summary** field, enter a short description to appear on a Suggested Content part.
- Click **Save**. You return to *Parts*.

Anonymous Newsletter Subscription

With the Anonymous Newsletter Subscription part, you can offer a newsletter for website users to subscribe to without registering on your website. Because the subscriber does not create a user account, no sign-up transaction or constituent record is created in The Raiser's Edge. Typically, you may want to enable anonymous subscriptions for a particular newsletter, such as an introductory newsletter, that leads subscribers to become more involved with your organization and become active users and constituents.

Tip: To keep information for anonymous newsletter subscribers private, subscriber data is stored in the online database. You cannot view it on the administrative side of the website.

On the web page, the Anonymous Newsletter Subscription part appears as a box where users can enter their names and email addresses and click a button to subscribe.

➤ Design Anonymous Newsletter Subscription

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

- From the Design tab, in the **Newsletter** field, select the newsletter that users can anonymously subscribe to.

Anonymous Newsletter Subscription

Use this form to allow website users to subscribe to the newsletter without signing up for a user account. Because anonymous subscribers do not create user accounts, they do not appear as sign-up transactions in *The Raiser's Edge* to become new constituents.

Newsletter: * Select the newsletter that users can anonymously subscribe to.

Form title:

After subscribing navigate to: Select the page users are redirected to after subscribing.

2. In the **Form title** field, enter the text to appear at the top of the Anonymous Newsletter Subscription part on your website, such as "Get the Newsletter!"
3. In the **After subscribing navigate to** field, select the web page, such as a Welcome or Thank You page, to appear after the site user clicks **Subscribe**.

Note: If you do not select a web page in the **After subscribing navigate to** field, the website user returns to the Anonymous Newsletter Subscription part after he clicks **Subscribe**.

4. Click **Save**. You return to *Parts*.

Change User ID/Password

With the Change User ID/Password part, website users can change their usernames and passwords in the online database without affecting the usernames and passwords for other integrated Blackbaud programs. On the website, the user can update the username and password.

> Design Change User ID/Password

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, in the **After update navigate to** field, select the web page to appear after the website user changes the username and password.

Note: If you do not select a web page in the **After update navigate to** field, the Home Page selected on the Settings tab in *Sites & settings* automatically appears after the website user changes the username or password.

General

After update navigate to: *

User Profile Form Confirmation

Select the page users navigate to after they update their user ID or password.

Fields

Select the fields to include on form.

Include	Field	Editable	Required
<input checked="" type="checkbox"/>	Username	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Password	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Confirm Password	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Time Zone	<input type="checkbox"/>	<input type="checkbox"/>

- In the **Fields** grid, select the fields to display on your Change User ID/Password form. You can include the **User Name**, **Password**, **Confirm Password**, and **Time Zone** fields. For details about the grid, see [Change User ID/Password Fields Grid on page 24](#).

Note: If the site only collects email addresses for user logins, **Email Address** appears instead of **User Name** as the login field option.

- Click **Save**. You return to *Parts*.

Change User ID/Password Fields Grid

The table provides information about the options in the **Fields** grid on the Change User ID/Password part.

Option Program Administrator or Website User? Notes

Include	Program	Select the checkbox next to the fields to include on your Change User ID/Password form.
Field	N/A	Displays the default field name for your Change User ID/Password form.
Editable	Program and website	To enable other users to edit the field, select this checkbox.
Required	Website	To make a field required on the Change User ID/Password form, select this checkbox.

Communication Consent Part

The Communication Consent part enables you to capture explicit communication consent from your constituents — and to assist with General Data Protection Regulation (GDPR) compliance — on your Blackbaud NetCommunity Spark forms. Website users can make consent option preference selections on a web form. This includes specifically opting in or opting out of specific consent options.

Note: Raiser's Edge Patch 8 — where the communication channels and categories are configured — is required to use the new Communication Consent part in Blackbaud NetCommunity Spark. If you are not using Patch 8, the communication consent functionality is not enabled in Blackbaud NetCommunity Spark.

As an organization, you can create one Communication Consent part — or multiple versions of the part — to support the forms in Blackbaud NetCommunity Spark that collect constituent information and write the data to constituent records in The Raiser's Edge.

You can include a Communication Consent part on any of the following forms in Blackbaud NetCommunity Spark by configuring the **Consent** section on the form's Design tab:

- Donation Form
- Event Registration Form (Classic)
- Events Registration Form
- User Login Form
- User Email Preferences Form
- Payment 2.0 Form

Note: This form supports consent for all transactions types — donations, event registrations and memberships.

- Membership Form
- Profile Form
- Email Signup

After users submit the form, their consent information is downloaded to the BBNC plugin along with their transaction. After the transaction is processed, their constituent record is updated in The Raiser's Edge with their communication consent preferences. If the user is logged in when they submit the form and their BBNC account is linked to a constituent record in The Raiser's Edge, their communication consent preferences are written directly to their record in The Raiser's Edge.

Note: You can expect a lag time of approximately 5 minutes between the time you commit a donation or membership transaction batch and the time the consent preferences are written to the constituent's record in The Raiser's Edge.

After a user has already provided consent preferences, if they fill out a subsequent form that includes the Communication Consent part and they are logged into Blackbaud NetCommunity Spark, their consent preferences are automatically pre-populated. Users can modify their consent preferences, and the changes are then written to their constituent record when they submit the form.

If a transaction is canceled for any reason, the user's consent preference selections for that transaction are not written to their constituent record.

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

➤ Design Communication Consent Part

1. Under **General**, enter a title to display on the web page for the communication consent preferences or use the default title. This field is required.

General

Title: *
 Enter a consent title to appear on the web page.

Consent Statement *
 Please let us know how we should contact you in the future.
 Enter the instructions for the consent.

Consent Options *
 Add consent options to display as consent options on the web page.

Channel	Category	Caption	Required	
<input type="checkbox"/> Email		<input type="text" value="Email"/>	<input type="checkbox"/>	<input type="button" value="Remove"/>
<input type="checkbox"/> Auto-Phone		<input type="text" value="Auto-Phone"/>	<input type="checkbox"/>	<input type="button" value="Remove"/>

Email Opt-out checkbox
 The opt-out checkbox on the consent part allows website users to indicate that they do not want to receive email messages from your organization.

Opt-out checkbox label: *
 Enter a label for the checkbox to opt out of email messages.

Privacy Policy *
 Add a link to a privacy policy to display on the web page.

☐ None:
☒ Create link to Blackbaud NetCommunity Page:
☐ URL:

2. Under **Consent Statement**, enter customized instructions or use the default statement.

3. Under **Consent Options**, add the consent options you want to display on the web page.
 - a. Select **Add Option** to search for consent options that are configured in The Raiser's Edge, then choose the ones to include on the form. For each consent option, you can modify the caption that displays on the form, specify whether the option is required, or remove the option.
 - b. To add a divider to separate sections on the form — for example, to keep all email consent options together — select **Add Separator** and include a caption for the separator.

You can click and drag the consent options to reorder them and to move the corresponding separators.
4. Under **Email Opt-out checkbox**, enter the text to use for the **Email opt-out** option that's included on the consent part. When users select this option, it globally opts them out from receiving communication from your organization through any email channel. It also selects the **Requests no email** option on their constituent record in The Raiser's Edge.
5. Under **Privacy Policy**, select an option for including access to your organization's privacy policy on the web page. Select **Create link to Blackbaud NetCommunity page**, then click the binoculars to choose an existing page on your website that includes your privacy policy. Select **URL** to include an external link to the privacy policy, then enter the URL. If you don't want to include a link, select **None**.
6. Select **Save**.

Custom Parts

In *Administration, Custom parts*, you can create a new custom content part type or link to an existing framework part type. After you create or link to the part type, it is available for selection in *Parts*.

Note: *Custom parts* offer additional flexibility, but come with additional complexity. If you host your own website, we strongly recommend only developers knowledgeable in all areas of customizations design them. This includes writing HTML and JavaScript code. Users without this expertise should not design these parts. If Blackbaud hosts your website, customizations can only be completed by Blackbaud or one of our designated partners. For more information, please contact your Blackbaud Account Executive.

To create a custom content part type, click **New content part**. A custom content part uses JavaScript and HTML to create the part editor and define how to display the part on a web page. You can use custom content parts to create customizations such as slideshows, tabbed content, RSS Feed readers, accordion content, pop-up boxes, and callout boxes.

To link to an existing framework part type, click **New framework part**. To build custom framework parts for your website, you should understand Blackbaud NetCommunity Spark from a site designer's perspective and have a working technical knowledge of ASP.NET. The content for custom framework parts can come from a variety of sources and can be as simple as text or HTML stored in the Blackbaud NetCommunity Spark database, or it can be data from the back office such as constituent giving history. For example, you can use a custom framework part to create a custom individual search form or a custom pledge form for Blackbaud NetCommunity Spark.



Directory

Note: The Directory part is not a standard feature in Blackbaud NetCommunity Spark. To learn how to upgrade Blackbaud NetCommunity Spark to include online directories, please email solutions@blackbaud.com.

With a Directory part, you can allow website users to search for other website users in defined groups of constituents. Users can then view profile displays to learn more about constituents. To publish directories on your website, you use constituent queries to access information about website users. For example, you can create a constituent query for the Class of 2000 in The Raiser's Edge and use it to create a directory of users in that class. You can then select fields for website users to search against. For example, you can allow users to search the directory for data in the **First Name**, **Last name**, and **State** fields. You can also provide links from the directory to constituent personal pages.

Note: The directory search can return up to 500 results that match the criteria entered by a site user.

You also select the fields to appear on your web page when the user's search produces results. For example, you can select to display **First Name**, **Last name**, **Address Line 1**, **City**, and **State** fields for your directory results. The field you list first for results links to the constituent's published profile information.

You can also allow website users to send personal messages to others in the directory without sharing their email addresses.

➤ Design Directory

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, in the **Directory title** field, enter a name for the directory, such as "Class of 2000 Directory."

Directory title:

Records to Include

Limit to query:

Include:

Include Deceased: ☐

Search Form

Split search fields into: column(s).

☐ Load unfiltered results when this part is loaded

Results

Show navigation controls:

Results per page:

Show number of results:

☒ Enable alphabetical index for individual and organization name

Display text:

No records found message:

Linked profile page:

Include a page link for: (applies to Individuals only)

Include a send message link for:

☐ Allow messages to non-users

Fields to Include

2. Under **Records to Include**, specify the records to include in the directory's search results.
 - a. The **Limit to query** field displays the selected query of records included in the directory. By default, "All Constituents" appears.

Tip: For a query to appear as a selection, you must first create it in The Raiser's Edge. When you create a query, you may need to refresh the website for it to appear as a selection. To refresh, select **View, Refresh** from the menu bar.

To include information from all constituents in your database, leave the default database "All Constituents." To select another existing constituent query to use as the directory, click **Change**. The Query Search screen appears. For information about how to use the Search screen, see the *Program Basics Guide*.

- b. In the **Include** field, select the type of constituent records to include in the directory search results. You can select "Both Organizations & Individuals," "Individuals Only," or "Organizations Only."
 - c. To include deceased constituents in the directory search results, select **Include Deceased**.
3. Under **Search Form**, in the **Split search fields into** field, select how many columns of search fields to appear in the criteria table. You can display up to five columns.

To process a search while the user browses your Directory part, select **Load unfiltered results when this part is loaded**. When you select this checkbox, the directory search processes before the user enters criteria and clicks **Search** on your website.
4. Under **Results**, set up how search results appear on your Directory part.
 - a. In the **Show navigation controls** field, select whether the navigation buttons should appear above the results, below the results, or both above and below the results.

- b. The directory search can return up to 500 results that match the criteria entered by a site user. In the **Results per page** field, select the maximum number of results to appear on a page when a site user searches the directory. You can display up to 50 results per page.
- c. You can include in the search results the total number of records that met the user's search criteria. In the **Show number of results** field, select whether to display the total number of results above the results, below the results, or both above and below the results.
- d. To display an alphabetical index so that website users can filter search results by the first letter of last names and organization names, select **Enable alphabetical index for individual and organization name**. Then in the **Display text** field, enter the field label to display beside the alphabetical index.
- e. In the **No records found message** field, enter the message to appear if no records meet the search criteria the user enters to search the Directory on your website. By default, the message "No directory entries match your criteria" appears.
- f. Directory results can link to a page that contains a Profile Display part. In the **Linked profile page** field, select the page to link to. The field you list first in the **Listing Fields** box becomes the link to the page you select in **Linked profile page** field.

Note: When website users open profile pages from directory search results, a **Back to search results** link appears at the top of the page.

To display additional education profile information, link to a page that includes a User Education Profile Form part under a Profile Display part. A Profile Display part contains primary education information such as **Campus**, **GPA**, and **Major**. The User Education Profile Form part includes this information for all education records.

- g. To allow website users to view Team Fundraiser or Personal pages for individual constituents included in the results, in the **Include a page link for** field, select the Fundraiser or Personal Page Manager part to link to the directory results.
- h. To allow website users to send personal messages to constituents in the results, in the **Include a send message link for** field, select the User Networking Manager part to link to the directory results.

Note: If constituents opt out of email in The Raiser's Edge, website users can send them personal messages through the user networking site, but they cannot send them email messages.

- i. To allow website users to send personal messages through the User Networking Manager part to constituents who are not registered website users or who are registered but are not members of the user networking site, select **Allow messages to non-users**.

Warning: Constituents who do not have user networking accounts receive personal messages through email. To allow users to send email messages to these constituents, you must enable a Directory Message Notification in *Email* and select the User Networking Manager part for it. Without this notification, your users will not be able to send messages to constituents who are not registered website users or to constituents who do not have social networking accounts. For more information about notifications, see the *Email Guide*.

5. Under **Fields to Include**, select the fields the user uses to search the directory, such as **First Name** or **Last name**. Drag the field from the **Available Fields** box to the **Search Form Fields**

box, or select the field in the **Available Fields** box and click the right arrow to move it to the **Search Form Fields** box.

Note: The system administrator selects the attributes available on the Settings tab in *Sites & settings*. For information, see the *Administration Guide*.

Note: The **Education History** and **Primary Alumni** search fields appear only if you use *Alumni Tracking* in The Raiser's Edge. To allow website users to search only primary alumni information, use the **Primary Alumni** search fields. To allow users to search primary alumni and education history at the same time, use the **Education History** search fields and include the **Alumni Info** field.

To arrange the placement of a field in the **Search Form Fields** box, select the field and click the **Up** or **Down** button.

Note: The fields in the **Search Form Fields** list and the **Listing Fields** list do not have to match.

- Next, under **Fields to Include**, select the fields to appear in the directory display window. Drag the field from the **Available Fields** box to the **Listing Fields** box, or select the field in the **Available Fields** box and click the right arrow to move it to the **Listing Fields** box.

To arrange the placement of a field in the **Listing Fields** box, select the field and click the **Up** or **Down** button.

Warning: The listing field you put first for results acts as a link to the constituent record. However, if, on the Profile Form, the field's data is marked **Privacy edit** and the user selects to hide the data, no link exists. For example, if you select to list **First name** first, and the user selects to hide **First name** data, no link appears.

While you can link every field, the field you place first in the **Listing Fields** box automatically links to the page you select in the **Linked Page** field. For example, you select to display the alumni's last name, first name, birth date, and address. In this case, the last name is the link. When results appear, to indicate the last name is a link, it is underlined and changes color when you drag your mouse over it. When a website user clicks the alumnus's last name, the published profile information for that constituent appears.

7. To allow website users to send personal messages through the directory, select **Allow messaging between users** under **Messaging Fields**.
8. To enable anonymous messaging, select **Allow users who are not logged in to send messages**.


Note: You must have reCAPTCHA enabled on your site in *Administrator > Sites & settings* to use anonymous messaging. See [reCAPTCHA settings](#) for information on configuring reCAPTCHA.

If desired, configure the message's default text:

- a. In **Default subject**, edit the text that displays in the subject line of the email message.
- b. In **Confirmation message**, edit the text to display to the user after the message has been successfully sent.
- c. In **From address**, enter the sender's email address.

Note: To avoid having the email rejected or considered spam, the **From address** must be an email address on a domain that the organization owns and controls. This is necessary as some email providers, such as Yahoo and AOL, have strict DMARC policies that reject any emails with a yahoo.com or aol.com email address that have not originated from those domains.

- d. In **From name**, enter the sender's name.
- e. Configure the default email message and the default opt-out message.

Note: When messaging is enabled, an email icon () displays in the directory's Messaging column for users that have a primary email address and have not opted out of messaging. To send a message, click  beside the recipient's name. The email is sent via the organization to the recipient, and the recipient's email address is not visible to the sender. A confirmation message displays when the email is successfully sent. Website users can send a maximum of 10 messages per hour.

9. Click **Save**. You return to *Parts*.

Donation Form

Tip: For best practice information about donation forms, refer to [Best Practices for Donation Forms](#).

For a new Donation Form part, you select the constituent code, fund, and giving levels for web donations. When you select a Donation Form part for your web page, a canned donation form appears using the constituent code, fund, and giving level information you select.

The Donation Form part also contains an Acknowledgement screen. On this screen, you can create a standard email to send to donors who donate via your website.

When you download gifts from your website, you can create gift records for the donations in The Raiser's Edge. The gift records can include data such as amount, credit card number, billing address, an option to give anonymously, and comments.

Note: To design, style, and test a part on your website without creating transactions, generating emails, or communicating in any way with Blackbaud Services or The Raiser's Edge, select **Test Mode** on the Properties tab. For example, you can complete the fields on a donation form to ensure the confirmation page is styled and working properly. Although you submit the donation and receive a confirmation, a transaction does not appear on the NetCommunity page in The Raiser's Edge. Use Test mode to verify the user's experience, *not* to test data processing. Test mode does not validate credit card numbers and merchant accounts. Only users with supervisor rights can view parts in Test mode.

Note: We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the page.

- [Design Donation Form: General and Donor Gift Schedule Options on page 33](#)
- [Design Donation Form: Donor Options on page 35](#)
- [Design Donation Form: Designations and Giving Levels on page 36](#)
- [Design Donation Form: Sources \(Appeals\) and Required Fields on page 37](#)
- [Design Donation Form: Additional, Spouse, and Attribute Information on page 38](#)
- [Design Donation Form: Payments and Pledges on page 39](#)
- [Design Donation Form: eCards on page 41](#)
- [Design Donation Form: eReceipts on page 41](#)

➤ Design Donation Form: General and Donor Gift Schedule Options

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

Tip: For best practice information about donation forms, refer to [Best Practices for Donation Forms](#).

1. You can specify a constituent code to apply to new and existing constituents who use this part to contribute and select the minimum amount the donor can enter.
 - a. In the **Constituent Code** field, select a constituent code to assign to donors.
For more information about constituent codes, see the Constituent Codes section of the *Program Basics Guide*.
 - b. In the **Minimum Gift Amount** field, enter the minimum donation a donor can contribute. Enter "0" or leave this field blank to allow donors to contribute any gift amount.
2. To allow donors to contribute a single gift and pay the total amount at the time of the donation, select **Allow one-time gifts** under **Donor gift scheduling options**. A **One-time gift** option appears under **Type of gift** on the donation form.
3. To allow donors to contribute regular recurring gifts, select **Allow recurring gifts**. A **Recurring gift** option appears under **Type of gift** on the donation page. When a donor selects **Recurring gift**, **Frequency** options appear.

To allow the donor to determine the frequency of the recurring gift on the donation form, select **General**. Donors can select to make a contribution every week, month, quarter, or year.

To define the recurring gift schedules donors can choose, select **Specific**.

- a. Select "Weekly," "Monthly," "Quarterly," or "Annually" as the frequency.
- b. In the **On** field, select a day or date donors can choose to schedule the gift.

Tip: If a constituent donates a recurring gift and selects a start date that is not today's date, the transaction downloads to The Raiser's Edge. However, the transaction is not sent to your bank merchant when the donor submits the recurring gift. The merchant receives the transaction from the batch output you send to your bank for processing from The Raiser's Edge. For more information about bank merchants, see the *Administration Guide*.

- c. To add the frequency to the donation page, click **Add frequency**.
- d. Select **Allow donor to enter ending date**, if donors can specify when the recurring gift ends.

Note: To add multiple frequency options to the donation form, enter each custom schedule and click **Add frequency** to add the new schedule to the list. The selections you make appear in the **Frequency** grid on the Donation Form part.

4. To allow donors to create a pledge and define a pledge installment schedule, select **Allow pledge installment gifts**. An **Installment** option appears under **Type of gift** on the donation form. When a donor selects **Installments**, a **Number of Installments** field and frequency options appear on the donation form. Donors may enter up to "200" in this field.

To allow the donor to determine the frequency of the pledge payments on the donation form, select **General**. Donors can select to make payments in weekly, monthly, quarterly, or yearly installments.

To define the pledge installment schedules donors can choose, select **Specific**.

- a. Select "Weekly," "Monthly," "Quarterly," or "Annually" as the frequency.
- b. In the **On** field, select a day or date donors can choose to schedule the installments.

To add multiple frequency options to the donation form, enter each custom schedule and click **Add frequency** to add the new schedule to the list. The selections you make appear in the **frequency** grid on the Donation Form part.

The program calculates the installment amount and end date based on the number of installments, frequency, and date the donor specifies and displays this information on the donation page. For example, a donor contributes \$100 in four monthly installments and selects to pay each installment on the first day of the month beginning January 1. This generates four scheduled payments of \$25 ending April 1. Installment payments do not occur after the end date.

If a constituent selects a pledge installment start date that is not today's date, the transaction is sent to the merchant account when the gift is processed. For more information about bank merchants, see the *Administration Guide*.

- c. In the **Minimum installment amount** field, enter the minimum amount a donor can select to pay for each installment. For example, if you enter "10," in this field, when a donor selects a pledge installment schedule, each pledge payment must be at least ten dollars.

You can enter a minimum installment amount to prevent donors from making small payments over a long period of time. For example, if you do not enter a minimum amount, a donor may pledge twenty dollars and choose to pay one dollar each month for twenty months.

Note: You can configure the Transaction Manager part to allow payments toward outstanding pledges. However, when a donor selects to pay a pledge in installments and submits credit card or debit card payment information at the time the pledge is created, the **Pay** link in the Transaction Manager does not appear. The Raiser's Edge automatically charges the next pledge installment payment to the account provided. For information about pledge payments in the Transaction Manager, see [Transaction Manager on page 145](#).

➤ Design Donation Form: Donor Options

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. Under **Donor Options**, select the options to make available to donors.
 - a. To allow a company to donate, select **Allow corporate gifts**. When you select this checkbox, **This donation is on behalf of a company** appears on the donation form.
 - b. To allow donors to give anonymously, select **Allow anonymous gifts**. When you select this, **I prefer to make this donation anonymously** appears on the donation form.
 - c. To allow donors to enter comments on the donation form, select **Allow comments**.
Information from the **Comments** field on the donation form downloads to the Attributes tab on a gift record in The Raiser's Edge.
 - d. To allow donors to provide matching gift company information, select **Allow matching gifts**. When you select this checkbox, **My company will match my gift** appears on the donation form. Donors can select the checkbox and enter the company name in the **Company** field. If you use *MatchFinder Online*, **Look it up** appears next to the checkbox. Visitors click the link to access *MatchFinder Online* and search for the company.

Note: Blackbaud hosts the *MatchFinder Online* search page separately; it is not a page on your Blackbaud NetCommunity Spark website. Therefore, the page does not inherit the styles your site uses by default. Blackbaud can apply styles from your Web Developers to the search page so it integrates with your website. To contact Support about this, visit Blackbaud's [website](#).

MatchFinder Online contains information about matching gift companies, such as the minimum and maximum gift details and match ratio. It also integrates this data with The Raiser's Edge. For information about *MatchFinder Online* purchasing options, send an email to solutions@blackbaud.com.

For information about downloading matching gift information, see the "Download donations - single transaction process" procedure in the *Blackbaud NetCommunity Spark & The Raiser's Edge Integration Guide*.

For information about matching gifts in The Raiser's Edge, see *The Raiser's Edge Gift Records Guide*.

Note: The program does not support matching gifts for pledges and recurring gifts.

2. To create a tribute section on the donation form, select **Allow tribute gifts (one-time gifts only)**.

Note: If you use *Honor/Memorial Tracking* in The Raiser's Edge, select the **Allow tribute gifts** checkbox.

- a. To allow the donor to enter the tribute information, select **General**.
Select the checkbox for each tribute type to include in the tribute section. The tribute types listed are entries from the **Tribute Types** table in The Raiser's Edge.
- b. To have all tributes from the donation form go to a specific tribute, select **Specific**. When you select this, **Honor/Memorial** appears with a **Tribute** field.
To select an honor or memorial individual, click **Honor/Memorial**. A search screen appears so you can search for the individual.
In the **Tribute** field, select the tribute type and description to use. Information in this field is from the Honor/Memorial tab in The Raiser's Edge. The selections are a combination of the data from the **Tribute type** and **Description** fields.
- c. To remove the **Description** field from the **Tribute** section on the donation form, select **Hide tribute description** field.
If you select **Hide tribute description**, in the **Tribute Introductory Text** field on the Language tab, you can enter the text to appear at the beginning of the **Tribute** section on your donation form, such as "This gift is made in honor of someone special."
- d. If you select **General** so users can enter tributes themselves, you can select **Display tribute name fields as two fields (first/last name) to improve data entry**. When you select this checkbox, the **Tribute** section of the donation page displays **First name** and **Last name** fields so donors can enter information.

Note: If you do not select **Display tribute name fields as two fields (first/last name)**, the **Full name** field appears in the **Tribute** section of the donation form.

- e. Select **Display acknowledgee name fields as two fields (first/last name)** to create separate name fields for the acknowledgee. When a donor selects **Mail a letter on my behalf** on the donation page, the **First name** and **Last name** fields appear so the donor can enter an acknowledgee.

Note: If you do not select **Display acknowledgee name fields as two fields (first/last name)**, the **Full name** field appears on the donation form when a donor selects **Mail a letter on my behalf**.

Note: When you include tribute information on your donor page, **Mail a letter on my behalf** automatically appears on the page. When a donor selects this checkbox, name and address fields appear for the donor to enter information for use in a tribute letter.

➤ Design Donation Form: Designations and Giving Levels

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

Tip: For best practice information about donation forms, refer to [Best Practices for Donation Forms](#).

1. Under **Designations**, click **Add Designation** to choose each fund donors can associate with gifts. The Fund Search screen appears.
 - a. After you select a fund, in the **Display Name** field, enter the name of the fund to appear on the website.
 - b. Select the **Default** checkbox for the fund to apply gifts to if donors do not select funds.
To provide multiple funds for users to select from, click **Add designation** and repeat these steps to create another entry. When you do this, the **Support multiple designations** checkbox appears.
 - c. To allow users to write in funds other than those provided, select **Allow other designation**.
 - d. To include in the list the funds the donor has previously contributed to, select **Include donor's prior gift designations**.
If you select this checkbox, the list displays funds from the donor's last 50 gifts.
 - e. To allow users to donate to multiple funds, select **Support multiple designations**.
When you select this checkbox, **Add to Cart** appears on your website. Similar to purchasing items from a store, users select the funds to donate to.
2. Under **Giving levels**, to select a giving level for your donors, click **Add giving level**.
When you include giving levels and select **Support multiple designations**, each donation made to a fund is considered for the giving level. For example, if a \$500 donation is required for Gold status, and a donor donates \$250 to the 2008 Annual Fund and \$250 to the Building Equipment Fund, the donor does not receive Gold status. If the gift is one \$500 donation to the 2008 Annual Fund, the donor receives the Gold giving level status.
 - a. In the **Display name** field, enter the name of the giving level as it will appear on the website.
 - b. In the **Amount** field, enter the gift amount for the giving level.
 - c. To include a blank \$ **Other** field on the Donation page, select **Allow other amount**.

➤ Design Donation Form: Sources (Appeals) and Required Fields

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. Under **Sources**, to select an appeal for the gift, click **Add source**. With this information, your organization can manage how donors learn about donating through the website.
 - a. To include an appeal, click the binoculars in the **Appeal** column. The Appeal Search screen appears so you can select an appeal.
When you select source information, a **How did you hear about our site** field appears on the donation page. In this field, users can select from the appeals you select in this step.
 - b. In the **Display name** field, enter the name of the appeal as it will appear on the website. By default, the text entered in the **Appeal Name** field on the appeal record defaults in the **Display name** field.
 - c. In the **Default** column, select the checkbox for the appeal to use when the user does not select an appeal.

- d. To hide an appeal from the **How did you hear about our site** field, clear the checkbox for the appeal in the **Display** column.

When you do this, you can add source information to the end of a system generated URL in an email that navigates the recipient to your donation page. For example, create a link to your donation page in an email message. At the end of the system generated URL, add `&source=camp`. When the recipient clicks the link, the **How did you hear about our site** field does not appear on the page. The appeal stores the source information automatically based on the system generated URL.

Warning: To track source information this way, you must use a system generated URL. You cannot use unique URLs or friendly URLs created by a user.

The source information must include the appeal ID from The Raiser's Edge. For example, if the appeal ID in The Raiser's Edge is Annual2008, add `&source=Annual2008` to the end of the system generated URL. If the appeal ID includes a space, replace the space with a `%20`. For example, if the appeal ID is CAMP LETTER add `&source=CAMP%20LETTER`.

If the **Display** checkbox is selected for the appeal and a user navigates to the donation page via a URL without source information, the **How did you hear about our site** field appears on the page.

- e. To require users to select a source, select **Source is a required field**. If you select this checkbox, you must select the **Display** checkbox for at least one appeal.

To add additional appeals, click **Add source**. Another row appears in the grid for you to select another appeal.

2. Under **Required fields**, select the checkbox for each donor field to make required on the donation form. To ensure you download complete constituent information, we recommend that you make all of these fields required.

➤ Design Donation Form: Additional, Spouse, and Attribute Information

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. Under **Additional fields**, select the additional donor fields to include on the form.
 - a. In the **Include** column, select the checkbox for each additional field you want to appear on the form. If you require a field, you must also include it.
 - b. In the **Required** column, select the checkbox for each additional field website users must complete to submit the form.

Tip: We recommend you include **Middle name** so your organization meets the Canadian Revenue Agency's requirements for donation receipts.

2. Under **Attributes**, select gift attributes to associate with the donation page.

Tip: The gift attributes that appear in this frame are created in The Raiser's Edge. After you process a donation transaction, the attributes you select appear on the Attributes tab of a gift record.

3. In the **Display** column, select the checkbox beside the gift attribute to associate with the part. To make the attributes required, select the checkbox in the **Required** column. To change the text of the attribute on the donation page, enter the text to display in the **Caption** field.

➤ Design Donation Form: Payments and Pledges

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. Under **Payment setup**, select the payment options for website users.
 - a. To allow website users to pay for multiple transactions at one time, select **Use payment part**. The **Payment** frame appears. In the **Payment page** field, select the web page to use to process donations. The Payment part on the selected page determines the payment methods and merchant account used to process donations. For information about the Payment part, see [Payment on page 121](#).

In the box, enter the text to appear on the payment page after a donation is added. To format the content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.
 - b. To require website users to pay for donations one at a time, select **Proceed directly to payment**. Additional frames appear for you to select merchant account, payment type, and confirmation screen information.
2. In the **Merchant account** field, select the merchant account to use to process credit card transactions received through the donation form, such as your organization's IATS account. The system administrator sets up merchant accounts in *Administration*. For more information, see the *Administration Guide*.
3. Select the payment types donors can use to contribute to your organization.

Note: Donation forms that allow pledge payments must include credit card or direct debit as a payment method. For information about how to accept pledge payments, see [Transaction Manager on page 145](#).

4. Select options for the donation summary that appears after a user submits a donation.
 - a. To use the program's default confirmation screen, select **Use default confirmation screen**.
 - b. To customize a confirmation screen, select **Use custom confirmation screen**. The HTML editor appears with the default confirmation screen. You can edit it as necessary.

In the box, edit the content for the donation summary. To format the appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields. For more information, see the *Program Basics Guide*.

Tip: Customizations for the confirmation screen remain even if you select **Use default confirmation screen**. To remove your customizations for the screen, select **Use custom confirmation screen** and click **Restore default content**. The program's default confirmation screen appears in the HTML editor for you to customize again.

5. To enable users to specify their consent preferences for how they want to receive communication from your organization:

Consent

The Communication Consent part allows website users to specify their consent preferences for how they want to receive communication from your organization.

Consent part:
 Communication Consent Part ▼

Select how to display the consent options: ?

☐ Inline

☒ Overlay

- a. Under **Consent part**, select a saved Communication Consent part to include on the form.
- b. Select how you want the communication preference options to display — choose **Inline** to embed the options directly in the form itself or choose **Overlay** to display a pop-up window with the consent options when the form is submitted.

After users submit the form, their consent information is downloaded to the BBNC plugin along with their transaction. After the transaction is processed, their constituent record is updated in The Raiser's Edge with their communication consent preferences. If the user is logged in when they submit the form and their BBNC account is linked to a constituent record in The Raiser's Edge, their communication consent preferences are written directly to their record in The Raiser's Edge.

6. Under **Pledge payment**, select whether to display information about the next installment on the pledge payment donation form.

When donors access their giving history information with the Transaction Manager part, certain pledges with an outstanding balance include a link to the selected Donation Form page. Donors can use this link to enter a pledge payment. For information about how to link a page that includes a Donation Form part to the Transaction Manager part so donors can pay outstanding pledges, see [Transaction Manager on page 145](#).

Note: If your organization accepts electronic fund transfer (EFT) payments and the donor selects to pay a pledge in installments with a credit card or debit card at the time the pledge is created, the link to the donation form page does not appear. The link also does not appear if the pledge currently has a payment pending or if the pledge balance is zero.

Note: If a donor enters an amount greater than the installment amount due, the program automatically applies the overpayment to the next scheduled installment. If the a donor enters an amount greater than the total remaining pledge amount due, the program automatically creates a new gift with the overpayment.

- Select **Show next installment due date for pledges** to include information about the next scheduled installment. When you select this checkbox, a donor who selects to pay an outstanding pledge from the Transaction Manager can view the **Current balance**, **Amount due**, and **Due date** fields on the donation form. If you clear this checkbox, these fields do not appear.

- In the **Minimum pledge payment amount** field, enter the minimum amount a donor can pay toward an outstanding pledge. Enter "0" or leave this field blank to allow donors to enter any amount.

➤ Design Donation Form: eCards

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

Note: eCards is not a standard feature in Blackbaud NetCommunity Spark. To learn how to upgrade Blackbaud NetCommunity Spark to include online eCards, please email solutions@blackbaud.com.

1. Under **eCard options**, to associate an eCard with the donation web page, select **Include eCards**. For more information about eCards, see [eCards on page 51](#).

Note: When you edit a Donation Form part, click **eCard Email** to access the eCard design screen. You can use the default text provided or enter different text.

2. Click **Next**. The Acknowledgement Email screen appears.
3. Create an acknowledgement email for website users who use the donation form to donate to your organization. You can use the default text provided or enter different text.

Note: To include eReceipt information in an acknowledgement, use the **eReceipt Number** and **eReceipt Download URL** merge fields. If you include the **eReceipt Number** field, a receipt number is assigned to the donation. This number downloads to The Raiser's Edge. If you include the **eReceipt Download URL** field, the eReceipt contains a URL to a saved copy of the eReceipt PDF. For information about how to design the eReceipt, see [Design Donation Form: eReceipts on page 41](#).

Tip: To access the Acknowledgement Email screen, click **Acknowledgement Email** when you edit a Donation Form part. For information about how to design an acknowledgement, see the *Email Guide*.

4. To save the email, click **Save**. You return to the Edit Part screen.
5. Click **Save**. You return to *Parts*.

If receipt stack and number information exists for eReceipts on the Settings tab in *Sites & settings*, **Next** appears. To create and design the eReceipt for the part, click **Next**.

➤ Design Donation Form: eReceipts

After you create and design the eReceipt, a **Click here to view your eReceipt** link appears at the bottom of the donation confirmation screen. To view and print a PDF of the eReceipt, donors click this link.

1. From the Parts screen, select the Donation Form part for which you want to design an eReceipt.
2. In the **Action** column, click **Click here to edit this part**. The Edit Part screen appears displaying the Design tab.
3. Click **eReceipt**. The eReceipt design screen appears.

Note: To create eReceipts, you must establish the receipt stack and number information in *Sites & settings*. For more information, see the *Administration Guide*.

4. In the **eReceipt Options** frame, select whether to create an eReceipt for a **Credit card** or **Debit card**. You can create the eReceipt for both payment methods.
5. To mark the gift as receipted when you download it to The Raiser's Edge, select the **Mark gift as receipted in The Raiser's Edge** checkbox.

When you select this checkbox, the receipt stack and receipt number from Blackbaud NetCommunity Spark default in the **Receipt Stack** and **Receipt no.** fields on the gift record in The Raiser's Edge. Also, the URL for a copy of the eReceipt pdf defaults as a gift attribute.

Warning: If you use the Canadian version of The Raiser's Edge, the **Receipt Stack** field appears on the gift record. If you use the U.S. version of The Raiser's Edge, the receipt stack data does not appear on the gift record.

Warning: The program does not create a receipt number unless you include the **eReceipt Number** or **eReceipt Download URL** merge fields when you include eReceipt information in the acknowledgement.

6. In the **eReceipt Content** frame, enter the text to appear on the eReceipt. If you include the **eReceipt Number** field, the eReceipt contains the receipt number for the donation. To format the appearance and layout, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.
7. To preview the eReceipt, click **Preview PDF**.
8. To save the eReceipt, click **Save**. You return to the Edit Part screen.
9. Click **Save**. You return to *Parts*.

Donation Form - Mini (Beta)

The Donation Form - Mini (Beta) part is our beta release of a new Blackbaud NetCommunity Spark donation form that provides a new simplified checkout experience for campaign-based donations. The form has a modern, responsive HTML design that automatically adjusts to the device size, such as a smart phone or tablet, on which the page is being viewed.

When you create a Donation Form - Mini (Beta) part, you can customize the message displayed on the donation form, specify suggested giving levels, select a single designation and appeal to associate with donations made on the form, and customize the confirmation screen and email.

This new part allows donors to make a quick, basic donation by selecting a predefined giving level or, if configured, to enter their own gift amount. Because the form uses [PCI-compliant](#) Blackbaud Checkout, customers can be assured that credit card and merchant account information is processed and stored on a Blackbaud-hosted secure server.

Digital wallet options are available on the Donation Form - Mini (Beta) part for BBMS customers *only*.

- Visa Checkout and Masterpass are automatically available to donors as secure checkout options. Both support the same currencies as BBMS: USD, CAD, GBP, and EUR.

Note: The Apple Pay Early Adopter Program (EAP) is now closed and we are no longer onboarding any clients.

See the [Blackbaud Checkout FAQs](#) for more information.

Note: The Donation Form - Mini (Beta) part is considered a proof of concept and will transform into a full donation form in an upcoming Blackbaud NetCommunity Spark release.

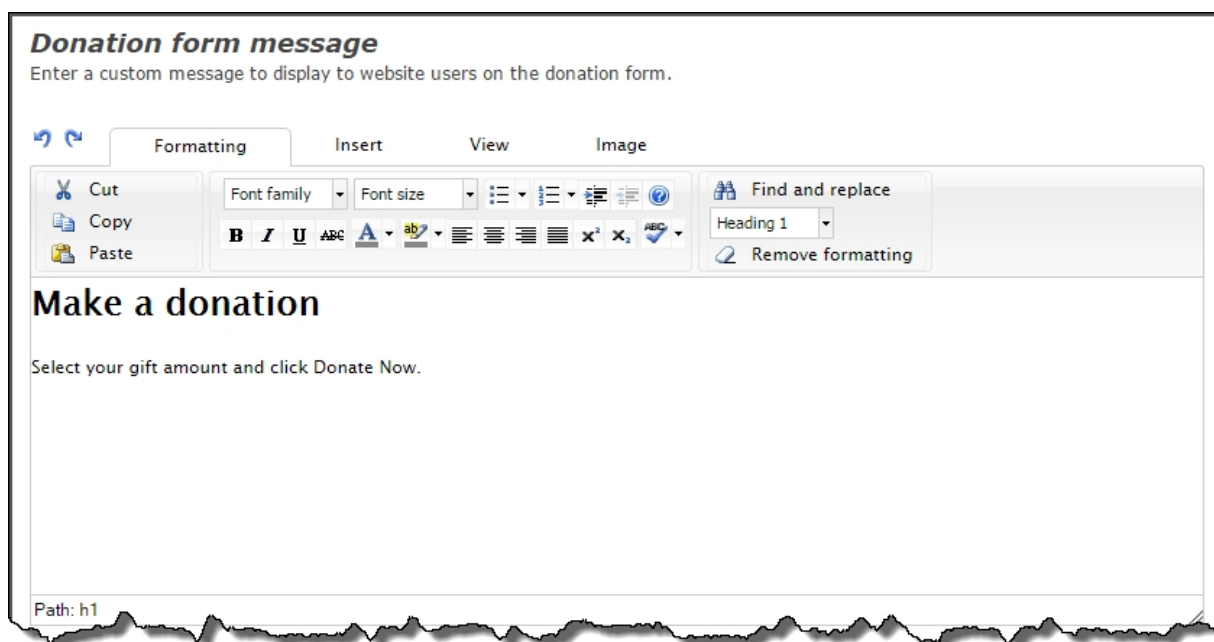
You download and manage transactions from the Donation Form - Mini (Beta) part in The Raiser's Edge the same way you download and manage transactions from the standard Donation Form. For information about how to process donation transactions in The Raiser's Edge, see the *Web Transactions Guide*.

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

Tip: For best practice information about donation forms, refer to [Best Practices for Donation Forms](#).

➤ Design Donation Form - Mini (Beta)


1. Under **Donation form message**, enter a custom message to display on the donation form.



The HTML editor shows the default message that displays on the donation form. You can use the default message or customize the content according to your needs.

2. In the **Designation** section, select the funds from The Raiser's Edge that you want associated with donations made using this form. The designations you specify display on the donation form in a drop-down list that users can select from.

Click the binoculars, search for the funds from The Raiser's Edge, then select the one you want to use.

For each additional fund to include, select **Add designation**, then browse to select the fund and enter a **Display Name**. You can select a designation to use as the default when users don't select one on the form. In the drop-down list on the form, the designations display in the order shown on the **Design** tab. To change the display order, select a designation's  and drag it to the desired position. To delete a designation, select **Remove**.

Designation

Select the designation to be associated with donations to this form. Note that the designation can be overridden by the URL used to access the donation form.

Designation

Campaign for Excellence



*

Designation

Set up the designation(s) available to donors when gifts are made. Click **Add designation** to add a new designation. Then, enter the **Display Name** that donors will see and select its corresponding fund from *The Raiser's Edge*. Also, indicate which designation to use as the **Transaction Default** if one is not selected by the donor.

Display name	Fund	Default
<div> <div></div> <input type="text" value="2017 Annual Fund"/> </div>	<div> <input type="text" value="Annual Fund - Library Services"/> </div>	<div> <input checked="" type="checkbox"/> <input type="button" value="Remove"/> </div>
<div> <div></div> <input type="text" value="Student Support"/> </div>	<div> <input type="text" value="Annual Fund - Student Support"/> </div>	<div> <input type="checkbox"/> <input type="button" value="Remove"/> </div>
<input type="button" value="Add designation"/>		

- To include an option on the form enabling donors to indicate that they're making a corporate donation, select **Allow corporate gifts** under **Donor options**. You can customize the option's caption that displays on the form by modifying the **Corporate gift checkbox** text on the **Language** tab.

When donors select this option on the form, they must also provide the name of the company on whose behalf they are making the donation.

- To include an option on the form enabling donors to indicate they're making an anonymous donation, select **Allow anonymous gifts** under **Donor options**. You can customize the option's caption that displays on the form by modifying the **Anonymous gift checkbox** text on the **Language** tab.

When donors select this option on the donation form, their donation is not recognized publicly but their information is available to the organization. The **Anonymous gift subcaption** default text — which you can modify — displays below the option to provide this explanation.

Donor options

Select the options to present to website users on the donation form.

☒ Allow corporate gifts

☒ Allow anonymous gifts

Giving levels
You may set up one or more suggested giving levels for this Donation Form. Click **Add giving level** to add a new level. Then, enter the **Display Name** and its corresponding gift **Amount**.

Amount (\$)	Display name	Default	
25.00 *		<input type="checkbox"/>	Remove
100.00 *		<input checked="" type="checkbox"/>	Remove
500.00 *		<input type="checkbox"/>	Remove

[Add giving level](#)

☒ **Allow other amount** Donor enters in the amount of the gift.

Minimum gift amount: Specify the minimum amount that a donor must give. Enter 0 or leave blank for no minimum amount.

Giving levels
You may set up one or more suggested giving levels for this Donation Form. Click **Add giving level** to add a new level. Then, enter the **Display Name** and its corresponding gift **Amount**.

Amount (£)	Display name	Default	
25.00 *		<input type="checkbox"/>	Remove
100.00 *		<input checked="" type="checkbox"/>	Remove
500.00 *		<input type="checkbox"/>	Remove

[Add giving level](#)

☒ **Allow other amount** Donor enters in the amount of the gift.

Minimum gift amount: Specify the minimum amount that a donor must give. Enter 0 or leave blank for no minimum amount.

To add a giving level, click **Add giving level**, then enter the gift **Amount** (required) for the giving level. You can also specify a **Display name** (optional) to show on the form for any of the giving levels. To have a specific giving level preselected on the donation form, select the corresponding **Default** option.

To remove a giving level, click **Remove** next to the one you want to remove.

To include a blank **\$ Other** field on the donation form, select **Allow other amount** to allow donors to contribute any gift amount. On the form, donors can enter the gift amount in the **Other** field. In **Minimum gift amount**, enter the minimum amount that donors must give. To specify no minimum amount, either leave the field blank or enter **0**.

- Under **Appeals**, select an appeal that you want to associate with all donations made using this form. This field is optional.

Appeal
Select the appeal to be associated with all donations made from this form. Note that the appeal can be overridden by the URL used to access the donation form.

Appeal

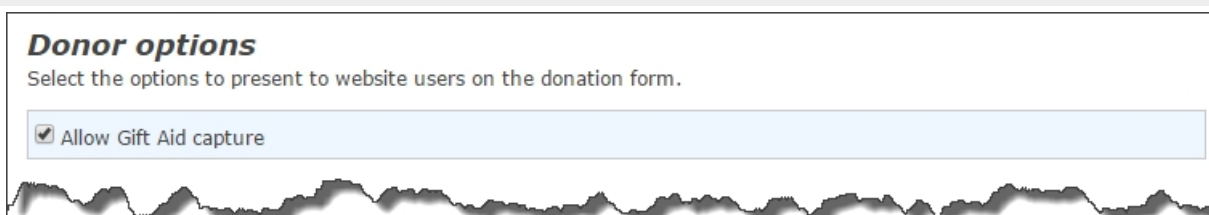
Direct Mailing [!\[\]\(d28ca9ce3e0e76b2108fafdd8e1b04fb_img.jpg\)](#) * [Remove](#)

Click **Add Appeal**, then click the binoculars. You can search for appeals from The Raiser's Edge, then select the one you want to use.

To remove the appeal, click **Remove**.

Note: The designation and appeal can be overridden by the URL used to access the donation form. You format this URL as `https://www.yourdomain.org/donate-now?aid=Appeal system record ID&did=Designation system record ID`.

Note: You can find the appeal and designation system record IDs to include in the URL by creating an ad-hoc query in The Raiser's Edge. In Analysis > Information Library, click **Add an ad-hoc query** on the Queries tab. In the Select a Source View window, select **Appeal** in Record type and in **Source view**, then click **OK**. In Select filter and output fields, select **Appeal record** and any other query criteria, and add to **Results fields to display**. Click the **Preview results** tab. For the desired appeal, copy the corresponding system record ID. This is what you'll use in the URL for the *Appeal system record ID*. To locate the *Designation system record ID*, create another ad-hoc query and follow the steps above, substituting **Designation** for **Appeal**.



Donor options
Select the options to present to website users on the donation form.

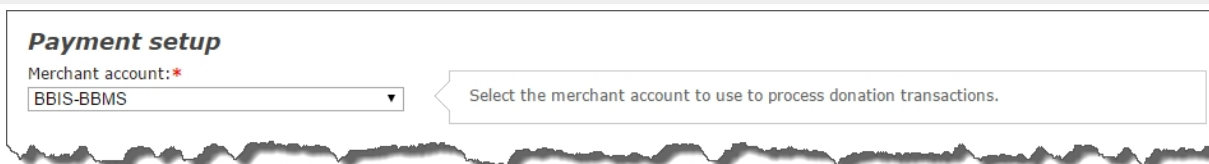
☒ Allow Gift Aid capture

You can customize the text that displays on the donation form for this option using the **Language** tab.

- Under **Payment Setup**, select the merchant account, such as your organization's Blackbaud Merchant Services (BBMS) account, to use to process credit card transactions received through the donation form.

Note: All merchant accounts support the Donation Form Mini - (Beta) part except for iATS and IP Payments. iATS and IP Payments will display as disabled in the **Merchant account** list.

Note: To take advantage of digital wallets like Apple Pay, Visa Checkout, and Masterpass, you must use BBMS. If your merchant account isn't BBMS, the system administrator can set it up in *Administration*. For more information, see the *Administration Guide*.

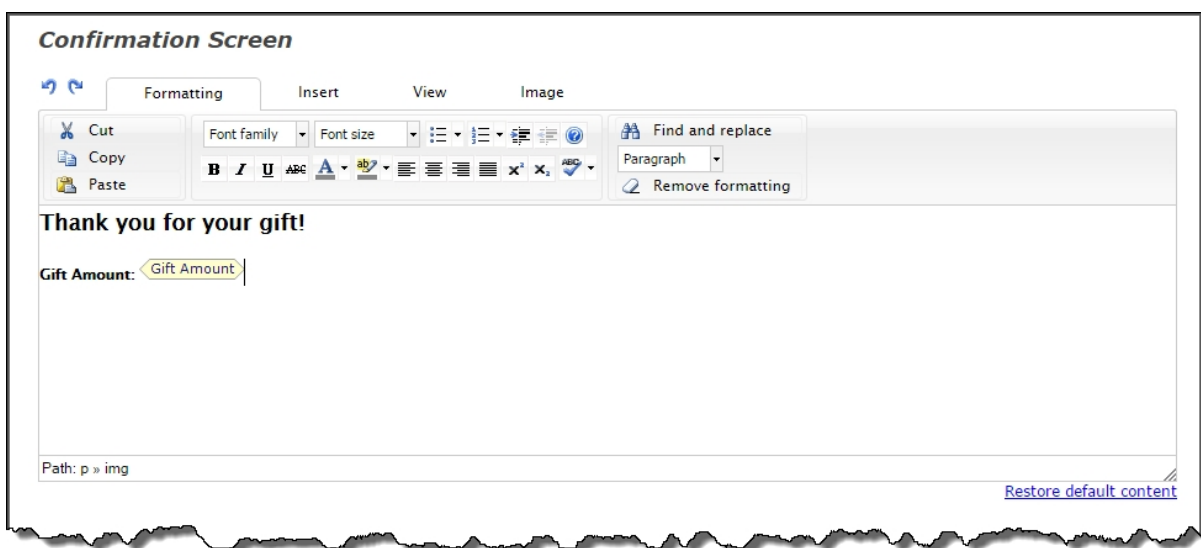


Payment setup

Merchant account: *
BBIS-BBMS ▼

Select the merchant account to use to process donation transactions.

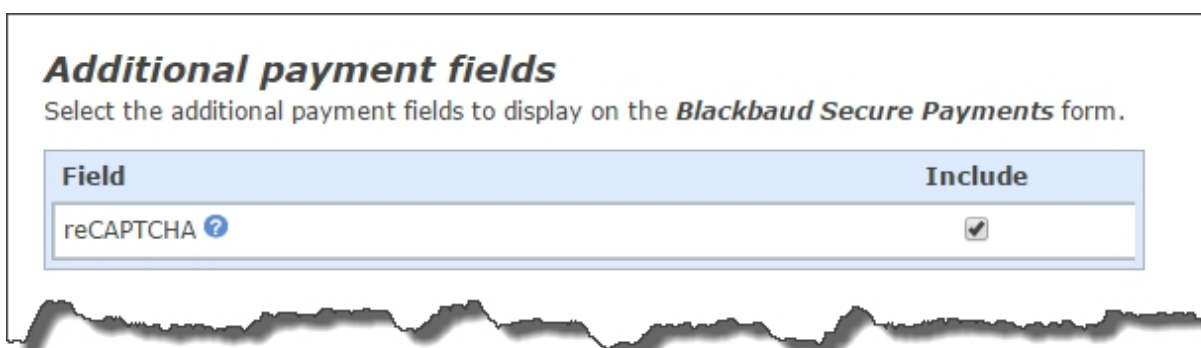
- Under **Confirmation Screen**, you can customize the message that displays to donors after their donation payment is made.



The HTML editor shows default content you can use for the confirmation screen message. If desired, you can customize it according to your needs. To format the content's appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields. Note that **Amount**, **Designation**, and **Appeal** are the only merge fields that can be displayed on the confirmation screen.

To remove your customizations for the screen, click **Restore default content**. The program's default confirmation screen appears in the HTML editor.

8. Optionally, under **Additional payment fields**, select **Include** to have a *reCAPTCHA* checkbox display on your Blackbaud Secure Payments form below the credit card payment fields. Users must select the *reCAPTCHA* checkbox before they can submit the form.



9. Click **Next**. You can design the email acknowledgment that's sent when a donor completes the payment transaction. You can select the fields to appear and format content appearance and layout.

For information about how to design an email to acknowledge a payment, see the *Email Guide*.

10. Click **Save**.

Blackbaud Checkout FAQs

Visa Checkout

➤ What is Visa Checkout?

Visa Checkout is a secure checkout option for donors accessing your website on any device. This secure payment option allows donors to skip filling out lengthy forms usually associated with online credit card transactions. For more information about Visa Checkout, visit <https://usa.visa.com/pay-with-visa/visa-checkout.html>.

➤ What do I need to do to enable Visa Checkout?

Nothing! Visa Checkout is automatically an available option for all BBMS customers. And, there's no onboarding process required. Once you enable Blackbaud Checkout in Blackbaud NetCommunity Spark, any donor making donations through that donation experience will have the Visa Checkout option available to them.

If you do not see the digital wallet options, you may not be using valid Blackbaud Payment Service (BBPS) credentials in the BBMS Web Portal.

To confirm:

- Log in to the Web Portal at <https://bbms.blackbaud.com>.
- Navigate to the Virtual Terminal using the top menu.
- Select one of the two options, either **Card Present** or **Card Not Present**.

If you receive an error message, you need to update your credentials before the digital wallets will appear on the checkout screen.

➤ What does it cost our organization to offer Visa Checkout?

There is no extra charge to use Visa Checkout. All transactions are processed via Blackbaud Merchant Services (BBMS) and are subject to the BBMS OneRATE.

➤ Will all donors see the Visa Checkout option?

Any donor accessing the donation form you create that uses Blackbaud Checkout will see the Visa Checkout payment option.

➤ Do my donors need Visa to use Visa Checkout?

Visa Checkout works with Visa, MasterCard, American Express, or Discover credit or debit cards. Donors can simply tap or click the Visa Checkout logo to enroll or make the purchase or donation.

➤ Does Visa Checkout work on any device?

Visa Checkout works on just about any device that can access the web, so your donor will see it on a smartphone, tablet, or computer.

Masterpass

➤ What is Masterpass by Mastercard?

Masterpass is a secure checkout option for donors accessing your website on any device. This secure payment option allows donors to skip filling out lengthy forms usually associated with online credit card transactions. For more information about Masterpass, visit <https://masterpass.com/en-us/>.

➤ What do I need to do to enable Masterpass?

Nothing! Masterpass is automatically an available option for all BBMS customers. And, there's no onboarding process required. Once you enable Blackbaud Checkout in Blackbaud NetCommunity Spark, any donor making donations through that donation experience will have the Masterpass option available to them.

If you do not see the digital wallet options, you may not be using valid Blackbaud Payment Service (BBPS) credentials in the BBMS Web Portal.

To confirm:

- Log in to the Web Portal at <https://bbms.blackbaud.com>.
- Navigate to the Virtual Terminal using the top menu.
- Select one of the two options, either **Card Present** or **Card Not Present**.

If you receive an error message, you need to update your credentials before the digital wallets will appear on the checkout screen.

➤ What does it cost our organization to offer Masterpass?

There is no extra charge to use Masterpass. All transactions are processed via Blackbaud Merchant Services (BBMS) and are subject to the BBMS OneRATE.

➤ Will all donors see the Masterpass option?

Any donor accessing the donation form you create that uses Blackbaud Checkout will see the Masterpass payment option.

➤ Do my donors need Mastercard to use Masterpass?

Any major credit or debit card can be added to the Masterpass account.

➤ Does Masterpass work on any device?

Masterpass works on just about any device that can access the web, so your donor will see it on a smartphone, tablet, or computer.

Apple Pay

➤ What is Apple Pay?

Apple Pay is a secure checkout option for donors who access your website on a device that supports Apple Pay.

Donors can use Touch ID or double-click an Apple Watch to provide their payment, shipping, and contact information to securely check out with just one touch.

Offering this option provides your donors the simplicity of Apple Pay, while enabling your mission to leverage increased user adoption and conversion rates.

➤ How do I set up Apple Pay as a payment option?

The Apple Pay Early Adopter Program (EAP) is now closed and we are no longer onboarding any clients.

➤ What are Apple's Terms and Conditions for our donation pages?

To offer Apple Pay as a checkout option, you must adhere to at least the minimum required Terms and Conditions by Apple.

If you implement the recommended method, you cover the minimum requirement as well.

Minimum requirement implementation

On a one-time donation form, display the Apple Pay payment mark next to other payment options.

The Apple Pay payment mark should be a link that directs the donor to the page that supports the Apple Pay donation experience.

Recommended implementation

On the homepage, include the detection code recommended by Apple to determine if the donor is on a device that supports Apple Pay. If the donor is on an Apple device and has set up Apple Pay, when they click the Donate button on the form, they'll be redirected to the page that supports the Apple Pay donation experience.

Contact Blackbaud for assistance, if needed.

➤ What does it cost our organization to offer Apple Pay?

There is no extra charge to use Apple Pay. All transactions are processed via Blackbaud Merchant Services (BBMS) and are subject to the BBMS OneRATE.

➤ Will all donors see the Apple Pay option?

No, only donors using an Apple Pay-enabled environment will see the option.

Donors who access your page from another environment can make a payment using a credit or debit card.

eCards

Note: The eCards part is not a standard feature in Blackbaud NetCommunity Spark. To learn how to upgrade Blackbaud NetCommunity Spark to include online eCards, please email solutions@blackbaud.com.

With the eCards part, your organization can enable website users to browse, personalize, and send eCards to others from your website. An eCard is an electronic greeting card that contains content from a selected template. Your users can send an eCard as an email message or as a printed copy in the mail. eCards can promote your organization and drive new visitors to your website to help build your online community. You can offer eCards as a free service for your website users or as an incentive to donate to your organization.

On your website, the eCards part includes multiple screens to step the user through the process to select, personalize, and send an eCard.

- **Choose** – On this screen, the website user selects the template to use to create an eCard. When you design the eCards part, you select the available eCard templates and how they appear on your website. Before you can add a template to the eCards part, the template must be available in *eCard Templates*. For information about *eCard Templates*, see the *Email Guide*.
- **Confirm** – After the website user selects an eCard template, this screen displays a preview of the selected template to verify it is the one to use to create an eCard. The website user can select to continue to create the eCard or return to the previous screen to select another template.

Note: When you design the eCard template, you can use merge fields to create additional content to appear when the preview of the template appears. For example, you can display a watermark you create over the preview of the eCard to prevent users who attempt to copy and send the free preview of the eCard to avoid a donation.

- **Personalize** – On this screen, the website user enters the recipients and email addresses to receive the eCard. The user can also enter a personal message for the recipients, select whether to send or print the eCard, and request to receive copies of the eCard email messages the program sends to each recipient.
- **Preview** – On this screen, the website user can view a preview of the personalized eCard before the program sends it. The website user can continue to send the eCard or return to the previous screen to adjust its personalization. From this screen, the user can print or generate a portable

document format (*.pdf) file of the eCard preview. If the user logged in to your website and you do not require a donation to send an eCard, the website user also sends the eCard from this screen.

- **Send** – If the user is anonymous or did not log in to your website, this screen appears. To help prevent automated abuse of your website, the Send screen provides a completely automated public turing test to tell computers and humans apart (CAPTCHA).

Note: The eCards part requires a completely automated public turing test to tell computers and humans apart (CAPTCHA). Visit <http://recaptcha.net/> to obtain free CAPTCHA functionality with *reCAPTCHA*. When you sign up for *reCAPTCHA*, you receive public and private keys, which your system administrator must enter on the Settings tab in *Sites & settings*. Without CAPTCHA functionality, you leave your website vulnerable to automated abuse. For more information, see the *Administration Guide*.

- **Donation** – If you require a donation from a user who sends an eCard, this screen appears. On this screen, the website user enters information about the donation. When you design the eCard part, you select the options that appear on this screen. After the website user completes the donation, the confirmation screen or Payment part page you select when you design the eCards part appears.
- **Finish** – If you do not require a donation to send an eCard, this screen appears to thank the user and confirm the program sent the eCard. From this screen, the user can select to print or generate a *.pdf file of the sent eCard. The user can also select to create another eCard.

Tip: To create reports about the eCards your users send through your website, design a Report (Email) part. For information about the Report (Email) part, see [Email Reports on page 55](#).

➤ Design eCards

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

Note: eCards do not apply to the web.config setting `BlockScheduledEmails`. Therefore, if you have this setting set to `True` to prevent email from sending from a test environment, recipients will continue to receive them.

1. From the Design tab, under **Available eCards**, browse the eCard template categories in *eCard Templates* and select the templates to make available to website users. The templates you select here appear on the Choose screen of the eCards part on your website.



Note: *eCard Templates* provides the eCard templates that appear under **Available eCards**. To add a template to an eCards part, the template must be in *eCards Templates*. For information about how to create an eCard template in *eCard Templates*, see the *Email Guide*.

2. Under **Display options**, enter how the selected templates appear on the Choose screen of the eCards part on your website.

Display options

Select whether templates will be selected from a single listing that spans all categories, or a listing for each category.

Specify the status of the survey:

- ☒ Display the templates in a single listing
☐ Display the templates in separate listings by category

Select whether the personal message field will be plain text or rich text:

- ☐ Plain text
☒ Rich text

Enter the maximum size for template thumbnails.

Maximum height (px):*

Maximum width (px):*

Sender and recipient options

Maximum recipients:*

Enter the maximum number of recipients per eCard. This number must be between 1 and 100.

Select whether to display sender and recipient name fields as single or separate fields:

- ☒ Display all as single fields
☐ Display all as separate first and surname fields

☐ Require eCard recipient's name

- a. Select how the selected eCard templates appear on the part's Choose screen on your website.

To display all the eCard templates together, select **Display the templates in a single listing**.

To display the eCard templates by category, select **Display the templates in separate listings by category**. When you select this option, your website users can browse for a template by its category.

- b. Select whether the personal message field on the part's Personalize screen on your website generates plain text or rich text.

Note: All email clients can easily read the plain text format, but it does not allow users to adjust the text's color, font, or format. With rich text, users can adjust the text's format and embed pictures and links, but not all email clients can easily read the rich text format. Email clients that do not support the rich text format convert the text to the plain text format.

- c. In the **Maximum height** and **Maximum width** fields, enter the maximum size, in pixels, of the thumbnail preview image of each template.
3. Under **Sender and recipient options**, you determine the maximum number of eCard recipients and whether to provide first and last name fields for senders and recipients.
 - a. In the **Maximum recipients** field, enter the maximum number of recipients for an eCard. You can allow website users to send eCards to a maximum of 100 recipients.
 - b. To provide one name field for the sender and one name field for recipients, select **Display all as single fields**. To provide **First name** and **Last name** fields for both the sender and recipient, select **Display all as separate first and last name fields**.
 - c. To require website users to enter first names for eCard recipients so merge fields are not blank, select **Require eCard recipient's name**.
4. To require website users to make a donation to send an eCard, select **Require a donation**. The options for the Donation Form part appear. For information about these options, see [Donation Form on page 32](#).
5. Under **Donation options**, select **Require a donation** to associate gift attributes with eCards for the part, under **eCard Attributes**, select attributes in the **Send date**, **Recipient first name**, and **Recipient last name** fields. Each field creates its own attribute in The Raiser's Edge. Website users do not view these attributes on the donation page.

Warning: If your eCard allows for multiple recipients and you select an attribute for the **Recipient first name** and **Recipient last name** fields, only the first recipient name information in the recipient list downloads to The Raiser's Edge. If the user enters one word for a recipient name, it downloads as the recipient first name attribute.

When you download a donation, some gift attributes can automatically add to the gift record. These attributes include NetCommunity Comments, NetCommunity Corporate Donation Contact, NetCommunity Email Source, NetCommunity Email Source ID, NetCommunity Page, and NetCommunity Page ID. You do not view these gift attributes in the **Attributes** frame or on the NetCommunity page in The Raiser's Edge. After the gift downloads, you can view the information on the gift record.

6. When website users send an eCard, the recipient receives an email message with the personalized content from the selected template or a link to a web page that contains the content. To create the email message for the eCards this part generates, click **eCard Email**. The eCard Email screen appears.
For information about how to create an eCard email message, see the *Email Guide*.
7. To customize the messages and labels that appear for the eCards part on your website, select the Language tab. For information about the Language tab, see [Language Tab on page 14](#).
8. Click **Save**. You return to *Parts*.

Email Reports

Using the Report (Email) part, you can create reports about email sent through the website.

Email Revenue Summary — The Email Revenue Summary displays the amount of donations collected through a link in the email to a donation page. Website users can filter the report results by date range, message type, and revenue type.

Email Activity Report — The Email Activity Report displays details for each email sent including the email title, type, sender's name, and date sent. Other details include the number of opened and bounced emails, and the number of page visits generated by each email. The report also contains a bar graph that shows the total number of opened, bounced emails, and page visits for all emails included in the report. Website users can filter the report results by email type, date range, and action.

Note: After you add the part to a page and send emails through the website, the report automatically generates results when you access the page.

This table explains the items included in the Email Activity Report.

Type	Type of message sent — Email, Acknowledgement, Newsletter, Fundraiser, Chapter, Personal Page, Campaign Appeals, and Scheduled
Sent	Number of emails sent
Opened	Number of emails sent that were tracked as opened
Bounced	Number of emails sent that were not delivered successfully
Page Visits	Number of web page visits generated by a link in the email

➤ Design Email Reports

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, in the **Report Type** field, select the type of report to create. Select **Email Revenue Summary** or **Email Activity Report**.
To view a pop-up preview of the report, click on the report type.
2. In the **Report Title** field, select the title to use for the report.
 - To use the report's name for the title, select **Default**.
 - To enter a custom report title, select **Other** and enter the title in the field.
3. To display the report title above the report, select **Show Report Title**.
4. To save the report, click **Save and Close**. You return to the Report (Email) design screen.
5. Click **Save**. You return to *Parts*.

Email Signup Form

The Email Signup Form part allows website users to sign up to receive email communication from your organization. After users complete the form, the program creates sign up requests in The Raiser's Edge so you can add their information to your constituent database. You use this part if your organization sends recurring emails from *Messages* and you want to allow users to sign up to receive them, but not

register for the website. When you configure the form, you include the constituent attributes from The Raiser's Edge that correspond to the lists you generate for recurring messages.

Note: The email sign ups create database constituent records, not website user records. The program only creates website user records when users sign up through the User Login, Personal Page Manager, or Fundraiser parts. It is possible for constituents to inadvertently complete the form multiple times, so we recommend you clear the **Send a unique email to each constituent who shares the same email address** checkbox in *Sites & settings*. When you clear the option, you prevent sending the same messages to duplicate constituents. For information about the checkbox, see the *Administration Guide*.

To configure the form, select the fields to appear and the constituent attributes to associate with the new records. Also select the page to appear after users submit the form and, if necessary, a constituent code to automatically apply to records.

When you select the fields, the **Email Address** and **Last Name** fields are required and selected by default because they are the minimum required fields to subscribe a new constituent to emails in The Raiser's Edge.

When you select the attributes, you select whether to display them on the form. Typically, you display attributes when you have multiple options and you want users to subscribe to emails that match their preferences. When you do not display attributes, the program automatically associates the attributes you select to new records. Constituent attributes are not required to configure the form, but we recommend you include them to comply with email opt-in best practices.

Note: When registered website users who are logged into your website complete the form, the program automatically populates their biographical information. The form adds constituent attributes to their records, but does not remove previous selections. To allow existing users to update their preferences, we recommend you include the User Email Preferences Form part on your website.

In The Raiser's Edge, you can look at the transactions for **Sign-up Requests** to see who subscribed to emails from your organization. In the Sign-up Requests Transactions window, use the new **Email Sign up Transactions** filter to view all transactions that originated from the email signup form. If there's no existing constituent, you can create a new constituent for linking, and then process the transaction. The constituent's information and any attributes entered on the email signup form are saved in the constituent record in The Raiser's Edge.

➤ Design Email Signup Form

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, under **Fields**, select which fields to include on the signup form and whether they are required. The **Last Name** and **Email Address** fields are required and are selected by default because they are the minimum required fields to subscribe a new constituent to emails in The Raiser's Edge.

Fields
Select the fields to include in your form.

	Include	Field Name	Label	Required
⋮	<input type="checkbox"/>	Title 1	<input type="text" value="Title 1"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	First Name	<input type="text" value="First Name"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Middle Name	<input type="text" value="Middle Name"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Maiden Name	<input type="text" value="Maiden Name"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Last Name	<input type="text" value="Last Name"/>	<input checked="" type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Email Address	<input type="text" value="Email Address"/>	<input checked="" type="checkbox"/>
⋮	<input type="checkbox"/>	Confirm Email Address	<input type="text" value="Confirm Email Address"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Formatted Address	<input type="text" value="Formatted Address"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Home Phone	<input type="text" value="Home Phone"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Gender	<input type="text" value="Gender"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Class of	<input type="text" value="Class of"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	School Name	<input type="text" value="School Name"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Birth Date	<input type="text" value="Birth Date"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Constituent ID	<input type="text" value="Constituent ID"/>	<input type="checkbox"/>

You can change the order in which the fields display on the form by clicking the field's row and dragging up or down in the list.

- Under **Attributes**, select **Include** for each constituent attribute you want to display on the form, and specify if it is a **Required** field. Typically, you display attributes when you have multiple options and you want users to subscribe to emails that match their preferences.

Note: All the constituent attributes you select in *Sites & settings* with a type of Yes/No are available, but we recommend you only include those your organization uses for recurring emails sent from *Messages*.

Attributes
Select the constituent attributes to display during the user registration process.

Constituent attribute options [View a video tutorial](#)

	Include	Field Name	Label	Required
⋮	<input type="checkbox"/>	Availability	<input type="text" value="Availability"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Origin	<input type="text" value="Origin"/>	<input type="checkbox"/>

- To enable users to specify their consent preferences for how they want to receive communication from your organization:

Note: Communication consent options are only visible to anonymous users — the options do not display on the Email Signup form for logged-in users.

Consent

The Communication Consent part allows website users to specify their consent preferences for how they want to receive communication from your organization.

Consent part:
 Communication Consent Part ▼

- a. Under **Consent part**, select a saved Communication Consent part to include on the form. This part can only be included inline on the Email Signup form and not as an overlay.

After users submit the form, their consent information is downloaded to the BBNC plugin along with their transaction. After the transaction is processed, their constituent record is updated in The Raiser's Edge with their communication consent preferences. If the user is logged in when they submit the form and their BBNC account is linked to a constituent record in The Raiser's Edge, their communication consent preferences are written directly to their record in The Raiser's Edge.

4. Optionally, you can select **Enable reCAPTCHA login** to display reCAPTCHA on the form or specify a **Constituent Code** to apply to users who sign up using the form.
5. Under **Constituent code**, select a constituent code to apply to new records.
6. Under **Navigation**, select the web page to display to users when the form is completed. Click the binoculars to display the list of pages on your site to choose from. This field is required.

reCAPTCHA

☒ Enable reCAPTCHA login Select this option to display reCAPTCHA on the Email Signup form.

Constituent Code

Select which constituent code you will apply to users who sign up through this form.

Constituent Code:
 Added in Blackbaud NetCommunity ▼

Navigation

Select the page that will appear after a user completes the sign up form.

Navigate to: *
 Home X 🔍

7. Configure the confirmation email that displays after users complete signing up.
 - a. Click **New Signup Confirmation Email**, then configure the email for your organization. The **Name of email**, **Subject**, **From address**, and **From name** fields are required.
 - b. Edit the default text for the email message.

The Raiser's Edge, their communication consent preferences are written directly to their record in The Raiser's Edge.

8. Click **Save**. You return to *Parts*.

Event Calendar

You can use the Event Calendar part to add a calendar to your website. Event Calendar parts can:

- Act as standalone calendars. For example, the academic departments at your school manage their own calendars on your website. Each department can create and maintain a separate Event Calendar part for its calendar.
- Work as sub-calendars that feed events to a larger organizational calendar. For example, your website has a main calendar that lists events for all areas of the school. With the Event Calendar Group part, each departmental calendar can feed events from their Event Calendar parts into the main calendar for the school. For more information about Event Calendar Groups, see [Event Calendar Group on page 1](#).

Note: Blackbaud NetCommunity Spark does not support the Event Calendar Group part.

When you include events from The Raiser's Edge on your website event calendar, you can also publish registration links to the website calendar directly from the corresponding Event Registration Form parts. For more information about how to publish event registration links, refer to [Design Event Registration Form on page 77](#).

You can use Event Calendar part properties to manage who views and manages each calendar. For example, a school may have a sub-calendar of faculty events that only users assigned to Administrator or Faculty roles can view or edit. You can also use Event Categories to manage the types of events added to the calendar and who manages them. For example, a soccer calendar may have categories such as Registration, Practice, and Games, and only users in the Coaches role have rights to add, edit, or delete events in these categories.

Calendar managers can create recurring events. When you edit recurring events, the manager can select whether to change all occurrences in the series, only the selected occurrence, or all future occurrences in the series including the selected occurrence. When you change an occurrence of an event, you cannot later make that occurrence part of a recurring series.

Calendar managers can select a time zone for the event. If an event does not have a time zone, the logged-in user's time zone setting determines the date and time displayed for the event. For anonymous users or any user who does not have a time zone specified, the event displays the time and date based on the system's setting. If your website users are all in the same time zone, we recommend managers leave the time zone field blank. If your website users are in multiple time zones, we recommend you set the time zone to the user's setting.

When you enter an address for the event, you can select to include a *Google* or *Yahoo!* map link to the location. On the Events screen, you can click **Preview map** under **Event Information** to verify that the location you entered is correct. Calendar managers can also use the HTML editor to add pictures and hyperlinks to the event listing and to format text.

To cancel an event, a manager can select **Mark Canceled**. In the List View and Calendar Highlights, the event title is appended with "- Canceled." In the Calendar View, the event name is struck through. For the calendar weblog, "Update" or "Removed" is added to the title, and readers who subscribe to the calendar weblog receive an updated calendar event posting through their RSS feed.

Website users have four views of the calendar: the Calendar View, the List View, Published Events, and Event Details View.

- The Calendar View displays a large monthly calendar. Dates with scheduled events are colored and list the events that occur that day. Users can click **Filter Events** to customize the categories of events that appear. Event names are hyperlinked so users can click them to read more information about the event. In this view, icons indicate whether an event is recurring, occurs in a time zone, or lasts longer than one day.
- The List View displays a list of all the events scheduled for the selected period of time. Event names are hyperlinked so users can click them to read more information about the event. Users can filter events by date or click **Filter Events** to select the types of events to view.
- If you enable the RSS (Really Simple Syndication) Event Publishing capabilities, calendar managers can post “stories” in a weblog form with details about upcoming events. Site users click **Published Events** to view the calendar weblog. Posted events also appear in site search results. Website users can subscribe to the RSS feed so they receive updates in their RSS reader about upcoming events.
- The Event Details View is the page that appears when a website user clicks on an event in the Calendar View or List View. It displays the details for the selected event.

In the Calendar View, List View, and the Event Details View, users can click **Print View** to open a window displaying the printer-friendly version of the calendar or event.

Also in the Calendar View, List View, and the Event Details View, users can click **Export as iCalendar** to export events in the iCalendar format (*.ics) so they can be opened in other calendar programs, such as Microsoft *Outlook* or Apple *iCal*. The export file includes only the events appearing currently in the calendar; if the calendar is filtered, filtered out events are not exported. If an event is time zone specific but not recurring, the event time is converted to UTC time in the export file. If an event is time zone specific and recurring, the export file includes the event time zone as well as the daylight savings rules for that time zone. The export file includes any *.html event descriptions but does not include event graphics. In the Event Details View, additional buttons appear so users can add the single event to their *Windows Live*, *Google*, or *Yahoo!* calendars.

Note: When using a version of Microsoft *Outlook* older than version 7, users should save the exported *.ics file to their local machine and use the **Import an iCalendar file** function in *Outlook*. If users with an older version attempt to import by double-clicking the saved *.ics file, it imports only the first event and discards any others. Users with *Outlook 7* can double-click the saved *.ics file to import all events with no issues.

In the Calendar View and List View, users can click **Import Events** to add multiple events to the calendar at one time. On the Select import file screen, in the **File** field, users browse to a *.csv file that contains header columns and the values to import. Only the **Start Date**, **End Date**, and **Title** fields are required, but the import file can include values for all fields that appear on the Add Event screen, except **Recurrence**.

Map imported fields

Import Field	File Field
Event Category	EventCategory
All Day Event	AllDayEvent
Time Zone	TimeZone
Start Date	StartDate
Start Time Hour	StartTimeHour
Start Time Minute	StartTimeMinute
Start Time AM/PM	StartTimeAMPM

After selecting the import file, the user must map the import fields to those in the program. However, if the *.csv file’s column headers use the same names as the corresponding fields in Blackbaud NetCommunity Spark, the program automatically maps the import file fields to the event fields.

Note: You can import data for all event calendar fields, except **Recurrence**. After you import the *.csv file, you can manually set an event’s recurrence.

Use the table below to set up *.csv files with values the program can automatically map to the corresponding event fields in Blackbaud NetCommunity Spark.

Field Name	Field Values
Event Category	Enter a category for the event. Your entry must match a category you previously created on the Code Tables page in <i>Administration</i> .
All Day Event	Enter "Yes" or "No," "True" or "False" to indicate whether the event will last the entire day.
Time Zone	Enter the geographical location associated with the time zone where the event occurs, such as "Chicago" or "Los Angeles," so the start and end times accurately reflect the scheduled time of the event for a viewer in a different time zone.

Field Name	Field Values
Start Date	Enter the start date in any standard date format. For example, you can enter January 1, 2011 as "01/01/11" or "1/1/2011." This field is always required.
Start Time Hour	Enter a whole number for the hour. If you entered "No" or "False" in the All Day Event column, this field is required.
Start Time Minute	Enter "0," "15," "30," or "45." When you manually create an event in Blackbaud NetCommunity Spark, you must enter this time in fifteen-minute increments. If you entered "No" or "False" in the All Day Event column, this field is required.
Start Time AM/PM	Enter "AM" or "PM." If you entered "No" or "False" in the All Day Event column, this field is required.
End Date	Enter the end date in any standard date format. This field is always required.
End Time Hour	Enter a whole number for the hour. If you entered "No" or "False" in the All Day Event column, this field is required.
End Time Minute	Enter "0," "15," "30," or "45." When you manually create an event in Blackbaud NetCommunity Spark, you must enter this time in fifteen-minute increments. If you entered "No" or "False" in the All Day Event column, this field is required.
End Time AM/PM	Enter "AM" or "PM." If you entered "No" or "False" in the All Day Event column, this field is required.
Title	Enter the name of the event. This field is always required.
Subtitle	If the event has a subtitle, enter this information.
Location	Enter the address for the event. If you plan to include a <i>Google</i> or <i>Yahoo!</i> map link, enter the street address, state, and zip code so the program includes accurate directions to the event's location.
Map Link	If you entered a location for the event, you can enter "Google" or "Yahoo" as the web mapping service. After you import the event, a Map link appears next to the location in the event's details.
Details	Enter information about the event.
Fees	Enter the fees associated with the event as a number (\$10.00) or as text (ten dollars).
Contact Info	Enter a contact name or email address.
More Info URL	Enter the URL that includes additional information about the event. This entry appears as a More info link when you open the event from the calendar.

➤ Design Event Calendar

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, refer to [Create and Edit Parts on page 7](#).

1. From the Design tab, under **General options**, enter a name for the calendar in the **Calendar title** field.
2. Under **Default display**, select the default view of the calendar. You can select **Calendar view** or **List view**. Website users can always select a different view when they open the calendar.
3. To integrate the calendar with events that have been created in The Raiser's Edge, select **Include events from The Raiser's Edge**. Click the binoculars to select an existing event query in The Raiser's Edge. When you include events from The Raiser's Edge on your website event calendar, the events appear after the next integration. To integrate the calendar with events from the query, include frequency information under **The Raiser's Edge integration in Administration**. The calendar updates according to the frequency unless you click **Refresh events** to immediately integrate the calendar with events. For information about frequency settings, refer to the *Administration Guide*.

Tip: We recommend that you add an event attribute to the event records in The Raiser's Edge that you want to display on your website event calendar. You can then create an event query for events with that attribute.

4. Under **Uncategorized events management rights**, select the roles with rights to manage any events not associated with a category.
5. Under **Event Categories**, select the event categories to associate with the calendar. After you add a category, click **Assign rights to the category**. The Event Category Security screen appears so you can assign rights to users and roles for the event category. For example, a Soccer calendar may have the Registration, Practice, and Games categories, and only users in the Coaches role can add, edit, or delete events in these categories. Also, when the coach adds a new event, they can assign its category from those you select for the calendar. For example, the coach specifies whether the new event is Registration, Practice, or Games. You can use these categories to filter the types of events that appear in calendar groups and calendar highlights. For example, you can set a calendar highlights part to display only events included in the Game category. For information about how to add event categories, refer to the *Administration Guide*.
6. To include a weblog for the Event Calendar part, select **Enable RSS**. Additional fields for the weblog appear.
 - a. In the **Date format** field under **Appearance**, select a date format for the weblog.
 - b. Under **RSS publishing properties**, in the **Title** field, enter a title for the weblog.
 - c. In the **Link URL** field, enter a website address news readers can use to link to the calendar weblog. Also, if your website has a News Reader part, add this link to your news reader so it displays new events when they are posted. For more information about the News Reader part, refer to [News Reader on page 1](#).

Note: Blackbaud NetCommunity Spark does not support the News Reader part.

- d. In the **Description** field, enter a description for news readers about the types of events posted on the calendar. For example, if your organization supports the environment, enter "Upcoming Local and National Events Supporting the Environment."
- e. In the **Copyright** field, enter a copyright notice for the weblog, if you have one.
- f. In the **Editor's email** field, enter the email address for the person responsible for the content of calendar postings.
- g. To approve weblog posts before they appear on your site, select **Moderated**.
7. To add a picture to the calendar weblog, click **Select Image** under **Image properties**. The Select Image from Image Library screen appears. For information about how to insert an image, refer to the *Program Basics Guide*.
8. In the **Link URL** field, enter the web address to open when a user clicks the image. The link can access another page on your site or an outside website.
9. Under **Security rights**, define the roles with post and manage rights for the published events.
 - a. In the **Post** column, select the checkbox to assign post rights for users and roles allowed to post to the weblog. This does not include rights to edit or delete postings.

Note: If the list is marked **Moderated**, posts are pending until a user with Manage rights approves them. A user with Post rights views his or her pending posts, but not those of other Post users. Only users with Manage rights view all pending posts.

- b. In the **Manage** column, select the checkbox to assign manage rights for users and roles allowed to add, edit, and delete weblog postings. If the list is marked **Moderated**, this grants rights to approve postings.
- c. To include additional users and roles, select **Add users and roles**.
10. Click **Save**. You return to *Parts*.

Event Registration Form

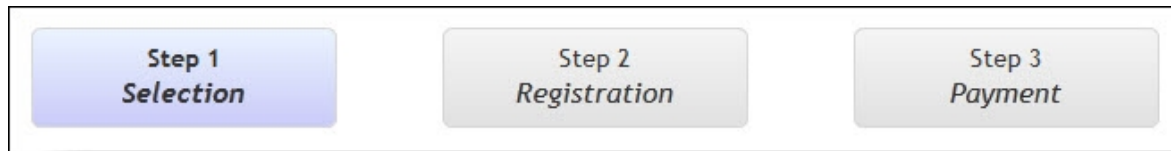
If you use The Raiser's Edge *Event Management*, use the Event Registration Form part to allow website users to register for events online. When you create an Event Registration Form part, you can select to include one or more event records from The Raiser's Edge on the part. After users submit event transactions online, you can download registration information directly to the event record.

Note: This new Event Registration Form part includes improvements such as organization registration, enhanced free event support, and an optimized registration experience. The original Event Registration Form is now called Event Registration Form (Classic) and it remains available. Consider using Event Registration Form (Classic) when your event requires a shopping cart (Payment 2.0 part integration).

Note: We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the page.

Event Registration Steps on Your Website

When you place the Event Registration Form part on a web page, registration options appear on three separate pages. Each page includes a status bar so website users can view their progress as they complete the event registration process. Users can return to the previous or next page by clicking the button in the status bar.



Note: The Step 3 *Payment* button appears when a user selects a paid event type on the Step 1 *Selection* page and then clicks **Continue**.

Step 1 Selection — The first page of the event registration process displays event details from The Raiser's Edge such as the descriptions, start dates, and times for events. Website users select events to attend and the number of registrants, and if you include a field for donations, they can also make additional gifts. The summary of the user's selections at the bottom of the page dynamically updates as the user enters information.

If the Event Registration Form is configured to do so, website users can optionally select to register as an organization. This allows users to make multiple ticket purchases for the same event. In The Raiser's Edge, the payment for the event is tied to the organization.

Step 1 Selection

Step 2 Registration

☒ Afternoon Tea

Saturday June 20



2:00 PM - 5:00 PM

We will be meeting at the playground site for a brief meeting and introduction. We will then be taking the shuttle to Cobblestone House for tea and desserts

Category	Quantity	Price	
Child 1 registrant	<input type="text" value="0"/>	\$50.00	
Adult 1 registrant	<input type="text" value="2"/>	\$75.00	

☒ Winter Ball

Monday December 20



5:00 PM - 9:00 PM

Winter Ball to be held at the People's Palace

Category	Quantity	Price	
Corporate Sponsor 1 registrant	<input type="text" value="0"/>	\$225.00	
Individual 1 registrant	<input type="text" value="2"/>	\$100.00	

Event registration summary

Afternoon Tea:	Adult	2	\$75.00
Winter Ball:	Individual	2	\$100.00
Total:			\$350.00

☐ Register as an organization

Continue

Step 2 Registration — On the second page, website users enter details for all registrants. This includes entering contact information and selecting registrant options that are participant attributes in your database. For example, a registrant may select a T-shirt size or a diet preference for your event.

To copy contact information, users can select the **Use this address for all registrants** checkbox and click the **Apply to all registrants** link for certain fields. After users enter registrant information for an event, links for the registrants appear on the next event, and users can click the links to autofill registrant information.

If users select **Register as organization**, the Step 2 Registration page displays with the **Organization information** fields that were configured on the Event Registration Form part. If users forget to register as an organization on the Step 1 Selection page, they can click **Register as an organization?** at the top of the Step 2 Registration page and the applicable organization registration fields appear on the page.

Users can click **Register as individual?** if they did not intend to register as an organization on the Step 1 Selection page.

In the following screenshot, you can view the checkboxes and links that allow users to autofill additional registrant information.

Step 1 Selection

Step 2 Registration

Step 3 Payment

Afternoon Tea

Saturday June 20 2:00 PM - 5:00 PM

We will be meeting at the playground site for a brief meeting and introduction. We will then be taking the shuttle to Cobblestone House for tea and desserts

[Register as an organization?](#)

Afternoon Tea

Registrant 1 - Adult

First name:

Elizabeth

Last name:

Smith

[Apply to all registrants](#)

Email:

esmith@abc123.org

[Apply to all registrants](#)

Phone:

[Apply to all registrants](#)

Address

Country:

United States

Address lines:

124 Maple Street

City:

Charleston

State:

SC

ZIP:

29492

☒ Use this address for all registrants☒ Use this as my billing information

Afternoon Tea

Registrant 2 - Adult

☐ Register later (The guest can provide this information when checking in to the event.)

First name:

Julian

Last name:

Smith

[Same as above](#)

Email:

jsmith@abc123.org

[Same as above](#)

Phone:

[Same as above](#)☐ Use this as my billing information

In the following screenshot, you can see that in addition to the checkboxes and quick links that are available on the first event, the next event also includes links for previously entered registrants. When users click these links, registrant information autofills in the registrant's box.

Winter Ball

Monday December 20 5:00 PM - 9:00 PM

Winter Ball to be held at the People's Palace

Winter Ball

Registrant 1 - Individual

Same as a previous registrant?

[Elizabeth Smith](#)

[Julian Smith](#)

First name:

Elizabeth

Last name:

Smith

[Apply to all registrants](#)

Email:

esmith@abc123.org

[Apply to all registrants](#)

Phone:

[Apply to all registrants](#)

Address

Country:

United States

Address lines:

124 Maple Street

City:

Charleston

State:

SC

ZIP:

29492



Use this address for all registrants



Use this as my billing information

Winter Ball

Registrant 2 - Individual

Same as a previous registrant?

[Elizabeth Smith](#)

[Julian Smith](#)



Register later (The guest can provide this information when checking in to the event.)

First name:

Julian

Last name:

Smith

[Same as above](#)

Email:

jsmith@abc123.org

[Same as above](#)

Phone:

[Same as above](#)



Use this as my billing information

Winter Ball

Monday 19 December 19:00 - 02:00

Winter Ball to be held at the People's Palace

Winter Ball

Registrant 1 - Individual

Same as a previous registrant?

[Elizabeth Smith](#)

[Julian Smith](#)

First name:

Elizabeth

Last name:

Smith

[Apply to all registrants](#)

Email:

esmith@abc123.org

[Apply to all registrants](#)

Phone:

[Apply to all registrants](#)

Address

Country:

Address lines:

City:

☒ Use this address for all registrants

☐ Use this as my billing information

Winter Ball

Registrant 2 - Individual

Same as a previous registrant?

[Elizabeth Smith](#)

[Julian Smith](#)

☐ Register later (The guest can provide this information when checking in to the event.)

First name:

Julian

Last name:

Smith

[Same as above](#)

Email:

jsmith@abc123.org

[Same as above](#)

Phone:

[Same as above](#)

☐ Use this as my billing information

When you select to include participant attributes for an event type, users select these options for each registrant for each applicable event on the page.

Winter Ball

Registration options**Registrant 1:**

Handicap:

Shirt Size:

Dietary Preference:

- ☐ Low Fat
- ☐ Low Sodium
- ☐ Vegan
- ☐ Vegetarian
- ☐ Diabetic

Registrant 2:

Handicap:

Shirt Size:

Dietary Preference:

- ☐ Low Fat
- ☐ Low Sodium
- ☐ Vegan
- ☐ Vegetarian
- ☐ Diabetic

Event registration summary

Afternoon Tea:	Adult	2	\$75.00
Winter Ball:	Individual	2	\$100.00
Total:			\$350.00

[Previous](#)[Continue](#)

Winter Ball

Registration options

Registrant 1:
Handicap:

Shirt Size:

Dietary Preference:
☐ Low Fat
☐ Low Sodium
☐ Vegan
☐ Vegetarian
☐ Diabetic

Registrant 2:
Handicap:

Shirt Size:

Dietary Preference:
☐ Low Fat
☐ Low Sodium
☐ Vegan
☐ Vegetarian
☐ Diabetic

Event registration summary

Afternoon Tea:	Adult	2	£75.00
Winter Ball:	Individual	2	£100.00
Total:			£350.00

[Previous](#)[Continue](#)

Step 3 Payment — On the third page of the event registration process, the program renders the secure payment page on the Blackbaud server to process transactions for event registration payments. When website users select multiple events with multiple charges, the total cost automatically defaults on the secure payment page. For information about the secure payment page, refer to [Secure Payment Page on page 131](#).

Note: When you include free events on the part and a website user registers only for free events, this page does not appear.

➤ Design Event Registration Form

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, refer to [Create and Edit Parts on page 7](#).

Show Me: Watch [how to create an event registration form for complex events](#).

1. From the Design tab, to publish a link to the registration form directly on your website event calendar, select **Publish to online event calendar**. When you select this, a **Register Now** button appears when visitors on your website view an event on the online calendar. For more information about the website event calendar, refer to [Event Calendar on page 60](#).
2. To select an event to use for the part, click **Add an event** under **Add events**. The Event Search screen appears for you to select an event. After you select one, the Edit configuration screen appears.

Event configuration: Alta Tennis Tournament

Event display options

Name: *
 Alta Tennis Tournament

Description: *
 This year's tournament will be held at the Garfield Tennis Center.

☐ Use event capacity

Select this option to use the event capacity from *The Raiser's Edge* as the registration limit. **The event's capacity is 1000.**

Event price options

Select the event types to include on the web page and enter information for each type. The types appear on the page in the same order that they appear in the grid. To reorder them, drag the dotted button.

Type	Include	Name	Price	No. registrants ?
Group	<input type="checkbox"/>	Group	\$50.00	5
Foursome	<input checked="" type="checkbox"/>	Foursome	\$40.00	4
Individual	<input checked="" type="checkbox"/>	Individual	\$20.00	1

- In the **Name** and **Description** fields, enter the event name and event description to appear on the web page. This information defaults from The Raiser's Edge event record, but you can change it for the web page.
- To use the capacity from The Raiser's Edge as the maximum number of registrations the form can accept, select **Use event capacity**. Under **Sold out message**, enter the text to appear after all the registrations are reserved. If you do not configure a message, the program uses a default.

Note: The sold out message appears when the number of processed and unprocessed registrations in The Raiser's Edge and the number of in-progress registrations online are greater than the event capacity on the The Raiser's Edge event record.

The program reserves in-progress registrations after users complete the Step 1 Selection page of the form. For each additional step, the program indicates the length of time users have to submit their information before it releases the reservations to other users. The program also releases registrations when users return to the Step 1 Selection page.

Note: When website users select to process payments by credit card, they must submit information within 10 minutes on the Step 2 Registration page and 15 minutes on the Step 3 Payment page. If users need to return to the Step 2 Registration page from the Step 3 Payment page, then the form continues the 10 minute timer. When users select Bill Me Later, they must submit information for the Step 2 Registration and Step 3 Payment pages within 10 minutes.

- Under **Event price options**, the event's types, names, and prices default from The Raiser's Edge event record. In the **Include** column, select the types to make available on the web page. In the **Name** column, enter the type name to appear on the page. In the **No.**

registrants column, enter the number of registrants for the type. For example, enter "2" for a Couple type. Next, click the arrow beside the type. In the **Description** field that appears, enter a type description to appear on the page. For example, you can enter VIP package information.

Tip: You can enter HTML in the **Description** fields to format and style text. For example, enter "<i>Family</i> packages include 5 tickets and free admission to the hospitality room" so that "*Family* packages include **5** tickets and **free** admission to the hospitality room" renders on page.

To limit the availability of an event type, click the arrow beside the type and select **Limit date availability**. Specify the dates and times for it to appear on the web page. For example, create an event type with a discount price for individuals who register early and indicate the date to remove it from the web page. To inform website users of the dates the event type is available, enter them in the event's **Description** field under **Event display options**.

For information about the event record, refer to the The Raiser's Edge *Event Management Data Entry Guide*.

- d. Under **Registrant options**, the price types for the event appear. For each event type you include, select the arrow beside it to include fields and participant attributes for the type.

Note: Types in these grids appear as the original default regardless of your selections in the **Event price options** grid. For example, when you remove a type or reorder the list in the **Event price options** grid, it does not affect the types in this grid. If you do not include a type in the **Event price options** grid, disregard it in this grid.

Registrant options

To select registrant options for each event type you include on the web page, click the arrow beside it. Types in this grid appear as the original default regardless of your selections in the **Event price options** grid. For example, when you remove a type or reorder the list in the **Event price options** grid, it does not impact the types in this grid.

Type

Group

☒ Allow anonymous

To allow the person who pays to register additional registrants as anonymous, select this checkbox.

Field options

Include	Field	Caption	Required
<input type="checkbox"/> Participant <input type="checkbox"/> Guest	Title	Title	<input type="checkbox"/> Participant <input type="checkbox"/> Guest
<input checked="" type="checkbox"/> Participant <input checked="" type="checkbox"/> Guest	First Name	First Name	<input type="checkbox"/> Participant <input type="checkbox"/> Guest
<input checked="" type="checkbox"/> Participant <input checked="" type="checkbox"/> Guest	Last Name	Last Name	<input checked="" type="checkbox"/> Participant <input checked="" type="checkbox"/> Guest
<input type="checkbox"/> Participant <input type="checkbox"/> Guest	Email	Email	<input type="checkbox"/> Participant <input type="checkbox"/> Guest
<input checked="" type="checkbox"/> Participant <input checked="" type="checkbox"/> Guest	Address	Address	<input type="checkbox"/> Participant <input type="checkbox"/> Guest

Additional options

Include	Field	Caption	Required
<input type="checkbox"/> Participant <input type="checkbox"/> Guest	Special Request Attribute	Special Request	<input type="checkbox"/> Participant <input type="checkbox"/> Guest

Individual

- e. To allow users who pay to register additional registrants as anonymous, select **Allow anonymous**. When you select this, a **Register later** checkbox appears on the web page for each additional registrant. When users do not know who is attending the event, they select the checkbox and the biographical fields and participant attributes remove so the registration page does not require the information.
- f. Under **Field options** and **Additional options**, select the biographical fields and participant attributes to appear on the web page in the **Include** column. To change the text to appear on the web page, enter it in the **Caption** field and to make it required, select its checkbox in the **Required** column. To reorder a field or attribute in the list, click and drag the dotted button on the far left.

Tip: Constituent attributes are not available for the Event Registration Form. You can only select one-per-record participant attributes with a type of Date, Text, Number, Currency, and Yes/No. Table type participant attributes are available without being marked as one per record. Fuzzy Date and Constituent Name types are not available for the part. If you recently added a new participant

attribute in The Raiser's Edge and it does not appear in the **Participant attribute options** grid or in *Sites & settings* for you to make it available on the web page, click **Refresh code tables** in *Code tables*. This updates code tables from The Raiser's Edge in Blackbaud NetCommunity Spark. For more information about how to update code tables, refer to the *Administration Guide*.

- g. To save your event options and return to the Design tab, click **Save**.

You can use this part for more than one event. To add another event to the form, click **Add an event** and repeat these steps.

3. To include an attendee list for an event:

Note: Before configuring the Event Registration Form part, you first need to specify a participant attribute in The Raiser's Edge to use for tracking attendee list opt-ins. This participant attribute must have a type of Yes/No. In *Administrator, Sites & settings*, on the **Settings** tab, select **Enable the attendee list for events** and then specify the desired participant attribute.

- a. Under **Add events**, select the **Include Attendee List** checkbox for the event.
- b. Under **Attendee List options**, clear **Registrants will be opted in by default** if you do not want users to automatically be included in the attendee list.
- c. From the drop-down list, select the **Directory Page** to use for the attendee lists.

The attendee list is implemented using the existing Directory functionality. You should set up one directory part with the desired fields, add it to a page, and then use that same directory page for all attendee lists across multiple event registration forms.

Once you've included the Event Registration Form part on a web page, you can click **Copy Link** to copy the attendee list URL for the event and publish it elsewhere on your website.

- d. Click the Language tab, then select **Registration** in the **Category** drop-down to edit the default text for the **Attendee list** link and the **Attendee list -- opt-in** option that display on the Event Registration Form.

The attendee list link displays on the Event Registration Form above each event. When there are multiple events, a corresponding attendee list link displays for each event. However, you can't customize the link name per event; the same text displays for all events.

4. Under **Fund**, click the binoculars to select the fund to associate with the event.
5. To select additional information for the part, click **Options**.

▼ Options

Total registrants
Maximum registrants available per checkout:
50

Select constituency
Apply a constituency to registrants:
▼

Additional donations
☐ Allow additional donations

- a. Under **Total registrants**, enter the maximum number of registrants to allow a user to enter on your website during a single transaction. You cannot enter a number greater than 50.
- b. Under **Select constituency**, select a constituency to apply to registrants. For more information about constituent codes, refer to the *Program Basics Guide*.
- c. Under **Additional donations**, to include an additional contribution field on the event page, select **Allow additional donations**. In the grid that appears, click the binoculars in the **Fund** column to select a fund. In the **Display name** column enter the fund name. To include a **Designation** field so participants can select from a list of funds, click **Add designation** and select a fund for each option. In the **Default** column, select the checkbox for the fund to use when the user does not select a fund. The gift links to the participant's constituent record, but not to the event record.

To include the Gift Aid option, select **Allow Gift Aid capture**. The Gift Aid option displays beneath **Make an additional donation** on the Event Registration Form. If desired, edit the default caption, checkbox text, and confirmation text for the Gift Aid option using the Language tab.

Note: When you enable Gift Aid, ensure that you select a different fund for the additional donation than the one used for the event registration fee. Otherwise, the gift will include the full amount of the event registration fee plus the additional donation. Since event registration fees are exempt from Gift Aid, your organization won't be able to claim any Gift Aid for the donations.

Note: You can allow users to select from a list of up to twenty-five designations.

- d. Under **Organization options**, select **Allow individual to register on behalf of organization** so users can register as an organization. In the grid below, select the fields to appear on the

web page in the **Include** column. To change the text to appear on the web page, enter it in the **Caption** field and to make it required, select its checkbox in the **Require** column.

When you allow organization registration, the person who pays the registration fee links to the organization in The Raiser's Edge.

Note: In the corresponding batch in The Raiser's Edge, two new columns are included for the organization: **Organization name** and **Linked organization auto-match**. In Web Transactions > Configure Integration, on the **Auto-match** tab, you can specify matching criteria for the batch to auto-match and update the **Linked organization auto-match** column. After you commit the batch, the **Registrations** tab on the Event record displays the organization record.

- e. Under **Free events**, select whether to display the **Price** column and enter text to appear in place of the price.

Free events

The part displays prices in the **Price** column. For free events, select whether to display the column and enter text to appear in place of the price.

<input type="checkbox"/> Hide column	When every type you include for the event is free, select Hide column to remove the Price column from the page. If one or more types for an event have a fee, the column cannot be removed.
<input type="checkbox"/> Display text	Enter the text to appear in the Price column for free events. For example, you can enter "Free."

Enter the text to display for free event prices.

To remove the column from the page when every type is free, select **Hide column**. If one or more types for an event have a fee, the column cannot be removed. To enter your own custom text, select **Display text**. In the field below, enter the text to appear in the column for free events. For example, you can enter "\$0" or "Free."

- f. Under **Additional fields**, select the additional fields to include on the form. In the **Include** column, select the checkbox for each additional field you want to appear on the form. If you require a field, you must also include it. In the **Required** column, select the checkbox for each additional field website users must complete to submit the form.

Note: When you select **Hide column** and a website user selects all free events on the Step 1 Selection page of the event registration process, prices and the total amount also do not appear on the selection summary at the bottom of the Step 1 Selection and Step 2 Registration pages.

6. To enable users to specify their consent preferences for how they want to receive communication from your organization:

Consent

The Communication Consent part allows website users to specify their consent preferences for how they want to receive communication from your organization.

Consent part:

Select how to display the consent options: ?

☐ Inline
☒ Overlay

- a. Under **Consent part**, select a saved Communication Consent part to include on the form.
- b. Select how you want the communication preference options to display — choose **Inline** to embed the options directly in the form itself or choose **Overlay** to display a pop-up window with the consent options when the form is submitted.

After users submit the form, their consent information is downloaded to the BBNC plugin along with their transaction. After the transaction is processed, their constituent record is updated in The Raiser's Edge with their communication consent preferences. If the user is logged in when they submit the form and their BBNC account is linked to a constituent record in The Raiser's Edge, their communication consent preferences are written directly to their record in The Raiser's Edge.

7. Under **Payment options**, select the payment options for website users.

Payment options

Merchant account: *

Select the merchant account to use to process event transactions.

Select at least one payment method for event registrants to use.

☒ Credit Card
☐ Pledge (Bill me later)

- a. In the **Merchant account** field, select the merchant account to use to process credit card transactions received through the event registration form, such as your organization's Blackbaud Merchant Services account.

The system administrator sets up merchant accounts in *Administration*. For more information, see the *Administration Guide*.

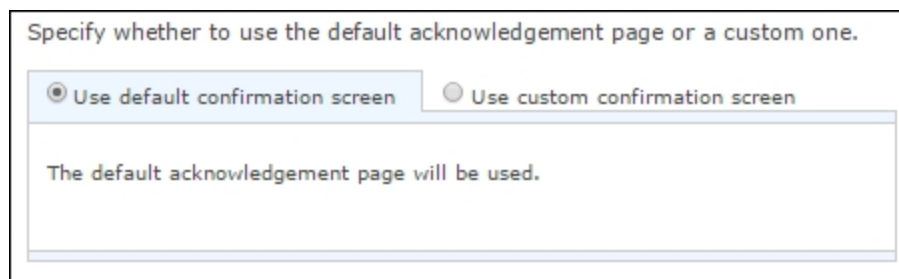
- b. For the payment method, select **Credit Card**, **Pledge (Bill me later)**, or both payment options.

When you select to include pledges, a **Bill me later** checkbox appears on the Step 2 Registration page. When a user selects it and navigates to the Step 3 Payment page, the user

enters biographical information for billing purposes, but the credit card fields do not appear so the transaction submits successfully.

Note: When a website user selects **Bill me later** on the Step 2 Registration page, the Step 3 Payment page does not render the program's secure payment page because a credit card payment is not included in the transaction.

8. Select whether the default confirmation screen or a custom confirmation screen displays the summary after a user registers for an event.



A screenshot of a web form titled "Specify whether to use the default acknowledgement page or a custom one." It contains two radio button options: "Use default confirmation screen" (which is selected) and "Use custom confirmation screen". Below the options is a text box containing the message "The default acknowledgement page will be used."

If you select **Use custom confirmation screen**, the HTML editor appears and displays the default confirmation screen. Customize the default confirmation screen according to your needs. To format the content's appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields.

The date and time merge fields do not display schedule information for events with a category of **Class** in The Raiser's Edge. As you design your confirmation screen for classes, we recommend you enter schedules in the content.

Tip: If you customize the default confirmation screen, the customizations remain even if you later select **Use default confirmation screen**. To remove your customizations for the screen, select **Use custom confirmation screen** and click **Restore default content**. The program's default confirmation screen appears in the HTML editor.

9. Click **Next**. The Acknowledgement Email screen appears.

10. Create the email to acknowledge the registration. You can use the default text provided or enter different text.

The date and time merge fields do not display schedule information for events with a category of **Class** in The Raiser's Edge. As you design your event acknowledgement for classes, we recommend you enter schedules in the content of your email.

For information about event registration loop merge fields, refer to [Event Registration Loop Merge Fields on page 97](#).

You can design your email to include a link to the event that populates the registration page with the recipient's biographical details such as name, address, phone number. To do this, select **Use email links to autofill forms** in *Sites & settings* and make sure the message's query-based email list uses Constituents as the data source. When a recipient navigates to the event from the email, the recipient's name appears as a link on the registration page. The recipient clicks the link to autofill the biographical details. For more information about how to use an email to autofill a form, refer to the *Administration Guide*.

Tip: When you edit an Event Registration Form, you can click **Acknowledgement Email** to access the Acknowledgement Email screen.

11. Click **Save**. You return to *Parts*.

Event Registration Form (Classic)

Note: The original Event Registration Form is now called Event Registration Form (Classic). This part still exists for you to use on your website, but we encourage you to use the [Event Registration Form on page 65](#). There are a few features the Event Registration Form (Classic) includes that the new Event Registration Form part does not, such as Payment 2.0 part integration and the ability to link to another page from the event. You may want to consider this when you create the new part.

Note: The Event Registration Form part is not a standard feature in Blackbaud NetCommunity Spark.

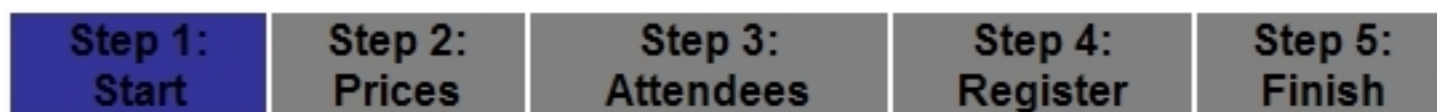
To learn how to upgrade Blackbaud NetCommunity Spark to include online events, please email solutions@blackbaud.com.

To allow website users to register for events online, you can create event registration forms. You can link your online and offline events and download online registration information directly to event records.

Note: If you use The Raiser's Edge *Event Management*, use the Event Registration Form part type.

You can set up the event registration form so that when members register for events online, their relationships from The Raiser's Edge appear as available participants, making online registration easy for members and adding personal details to their registration forms.

When the Event Registration Form part is added to a web page, the registration options appear on separate pages. You can include a status bar for the user to view their progress while they complete the event registration process.



- **Step 1: Start** — This is the Event Selection page. Information about each event appears, including the description, date, and time of the event. By default, the website user selects their events on this page and enters the registration quantity and pricing information on another page. If your Event Registration form includes only a few events, you can exclude the first step of registration to minimize steps for your registrants. When you exclude the first step, the progress indicator displays the event registration as four steps: Prices, Attendees, Register, and Finish. In a four step registration, the user selects the events and enters the quantities of event units as part of the Prices step.
- **Step 2: Prices** — This is the Quantity and Pricing page. The pricing options and units for the selected events appears. On this page, the website user enters the quantities of event units to register. If you exclude the first step of registration, the user selects their events on this step too.
- **Step 3: Attendees** — This is the Attendees page. On this page, the website user enters who will attend the selected events and selects any participant attributes you add to the Event Registration form.
- **Step 4: Register** — This is the Payment page. A summary of the event registration appears. On this page, the website user verifies the registration options selected are correct and enters any billing and payment information.
- **Step 5: Finish** — This is the Confirmation page. A summary of the billing and payment information appears.

Note: To design, style, and test a part on your website without creating transactions, generating emails, or communicating in any way with Blackbaud Services or The Raiser's Edge, select **Test mode** on the Properties tab. For example, you can complete the fields on an Event Registration Form to ensure the confirmation page is styled and working properly. Although you submit the registration and receive a confirmation, a transaction does not appear on the NetCommunity page in The Raiser's Edge. Use Test mode to verify the user's experience, *not* to test data processing. Test mode does not validate credit card numbers and merchant accounts. Only users with supervisor rights can view parts in Test mode.

Note: We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the page.

➤ Design Event Registration Form

Tip: For optimal performance, include only one Event Registration Form part for each web page.

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, under **Fund from The Raiser's Edge**, select the fund to associate with the event.

Fund from The Raiser's Edge

For registration fees that are collected, select the fund to use when registration fee gifts are created.

Fund:


(no Fund selected) 

When you download information, registration fees paid online through this form apply directly to the designated fund. For more information, see the Event Registrations section of the *The Raiser's Edge and Blackbaud NetCommunity Spark Integration Guide*.

2. Under **General Options**, select a constituent code to apply to registrants. For more information about constituent codes, see the *Program Basics Guide*.

General options

Constituent Code:



The constituent code specified will be applied to both new and existing constituents.

Note: If a registrant already exists in the database, the constituent record updates to include gift and event data from the downloaded event.

3. Under **Donor options**, specify whether to allow website users to provide matching gift claims through the website. If you select **Allow matching gifts**, the **My company will match my gift** checkbox appears on the web page. Site visitors can select this checkbox and enter the company name in the **Company** field. If you use *MatchFinder Online*, a **Look it up** link appears next to the checkbox. Visitors click the link to access *MatchFinder Online* and search for the company. *MatchFinder Online* contains information about matching gift companies, such as the minimum and maximum gift details and match ratio.

Donor options

☒ Allow matching gifts

Data from *MatchFinder Online* integrates with The Raiser's Edge. For information about

MatchFinder Online purchasing options, send an email to solutions@blackbaud.com.

For information about how to download matching gift information, see the Event Registrations section of *Blackbaud NetCommunity Spark & The Raiser's Edge Integration Guide*. For information about matching gifts in The Raiser's Edge, see the *The Raiser's Edge Gift Records Guide*.

4. Under **Registration Options**, select **Display progress indicator** to display a progress status bar for the user to view during the event registration.

Registration options	
<input type="checkbox"/> Display progress indicator	Check to display a progress status bar for the user to view during the event registration.
<input type="checkbox"/> Exclude first step of registration	Check to exclude the first Event Info/Selection page from the registration process. If the registration contains one or few events, you can remove this page to minimize steps for registrants.

5. To allow the website user to select both events and registration options on one page, select **Exclude first step of registration**. If you do not select this option, a five step progress indicator appears at the top of the event registration form and the website user selects the events to register for on one page and enters the registration quantity and pricing information on another page.

Tip: If you select **Exclude first step of registration**, Step 1: Start does not appear on the progress indicator. The progress indicator displays the event registration as four steps: Prices, Attendees, Register, and Finish. In a four step registration, the user selects the events and enters the quantities of event units as part of the Prices step.

Note: If your Event Registration form includes one or few events, we recommend you select **Exclude first step of registration** to minimize steps for your registrants. If your Event Registration form includes multiple events, a second event information and selection page may be helpful to your website users.

6. Under **Required fields**, select the checkbox for each donor field to make required on the event registration form. To ensure you download complete constituent information, we recommend that you make all these fields required.

Required fields

Specify whether the following registrant fields are required.

☐ First Name

☐ Title

☐ Phone
Captions

Provide captions for the following form items.

Item name	Text
Previous Button	<input type="text" value="Previous"/>
Next Button	<input type="text" value="Next"/>
Register Button	<input type="text" value="Register"/>
Registrants/Unit Label	<input type="text" value="Attendees"/>
No Charge Label	<input type="text" value="No Charge"/>
Sold Out Label	<input type="text" value="(Sold Out)"/>

- Under **Captions**, for each button or label listed, enter the text to appear on the Event Registration form.
- Under **Events from The Raiser's Edge**, select the event to use.

Events from The Raiser's Edge

Set up the event(s) for this Event Registration Form. Click **Add event** to search for an event.

Select event:

Event category:
Dinner

Date:
Saturday, June 20, 2009 at 2:00 PM

Description:
We will be meeting at the Playground Site for a brief meeting and introduction. We will then be taking the shuttle to Cobblestone House for tea and desserts.

To add an event to the field list, click **Add Event**. The Event Search screen appears so you can select an event.

You can use this event registration form for more than one event. To add another event to the form, click **Add Event** and select an additional event. After you select an event, additional options appear for you to set up how its registration appears on the form.

- a. Under **Event options**, in the **Display Name** field, enter the name of the event as it will appear on the website.

Event options

Display name: *

Enter the name of the event as it will appear on the website.

Display description: *

We will be meeting at the Playground Site for a brief meeting and introduction. We will then be taking the shuttle to

▲

▼

Enter the description of the event as it will appear on the website.

Page link:

🔍

Create a link from Afternoon Tea to another web page.

☐ Restrict registrations to capacity

Select this option to limit registrants based on the event's capacity. **Capacity for event is 50.**

☒ Display relationships

Select to display any relationship records linked to a member's constituent record for selection.

- b. In the **Display Description** field, enter the description of the event as it will appear on the website.
- By default, the text in the **Description** field appears in the **Display Description** field.
- c. Under **Page Link**, to add a link to another web page, click the binoculars. The Create Page Link screen appears. For information about how to create a page link, see the *Program Basics Guide*.
- d. The help text displays the capacity entered offline for the event. To limit how many registrants can sign up for the event using the event registration form online, select **Restrict registrations to capacity**.
- e. To display any relationship records linked to a member's constituent record in The Raiser's Edge for selection in participant fields, select **Display relationships**.
- For example, Mark Adamson has a constituent record. His wife Vicki has a relationship linked to Mark's constituent record. If you select **Display relationships**, when Mark registers for the Annual Golf Tournament on your website, Vicki's name appears in the drop-down list when Mark assigns participants. He can select Vicki or enter another name.
- f. Under **Pricing Options**, select the prices to appear on the registration page for each event unit. To display a listed price, select its checkbox in the **Include** column.

Pricing options

Include	Unit	Description	Registrants/Unit	Max units	Allow anonymous	Price (gift amount)	Receipt amount
<input checked="" type="checkbox"/>	Adult	Adult *	1 *	4 ▼	<input type="checkbox"/>	\$75.00	\$60.00
<input type="checkbox"/>	Child	Child *	0 *	4 ▼	<input type="checkbox"/>	\$50.00	\$40.00

In the **Description** column, enter the text to appear on the registration page for each event unit, such as "Individual" or "Couple."

In the **Registrants/Unit** column, enter the number of people allowed for the unit.

In the **Max units** column, select the maximum number of each unit allowed for each registration. By default, this value is "4."

To allow participants to register for an event unit anonymously, select its checkbox in the **Allow anonymous** column. When you select this checkbox, the **Name** field is not required when the website user registers for the event unit.

In the **Price (gift amount)** and **Receipt amount** columns, data from the Prices tab of the event record appears and is disabled. You cannot change this information on the website. To change the price or receipt amount, edit the event record offline.

- g. Under **Attributes**, select the participant attributes to appear on the event registration page. To display a participant attribute, select its checkbox in the **Display** column.

Attributes

Select the participant attributes to display.

Display	Attribute	Required	Caption
<input type="checkbox"/>	Special Requests	<input type="checkbox"/>	Special Requests
<input type="checkbox"/>	Dietary Preference	<input type="checkbox"/>	Dietary Preference
<input type="checkbox"/>	Source	<input type="checkbox"/>	Source
<input type="checkbox"/>	Partner Request	<input type="checkbox"/>	Partner Request

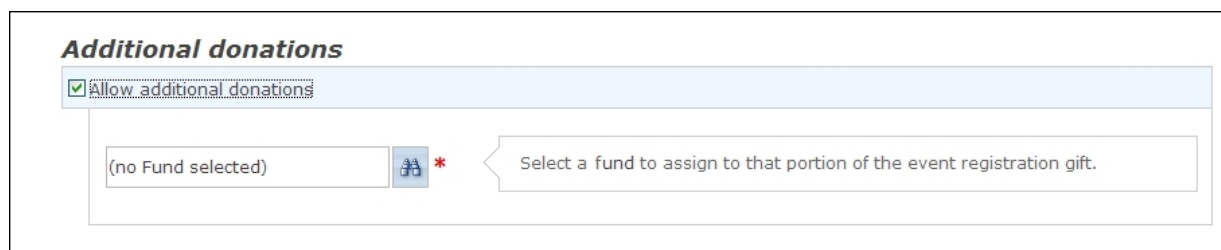
Tip: Constituent attributes are not available for the Event Registration Form. You can only select one-per-record participant attributes with a type of Date, Text, Number, Currency, and Yes/No. Table type participant attributes are available without being marked as one per record. Fuzzy Date and Constituent Name types are not available for the part. If you recently added a new participant attribute in The Raiser's Edge and it does not appear in the **Participant attribute options** grid or in *Sites & settings* for you to make it available on the web page, click **Refresh code tables** in *Code tables*. This updates code tables from The Raiser's Edge in Blackbaud NetCommunity Spark. For more information about how to update code tables, see the *Administration Guide*.

To make a selected participant attribute required, select its checkbox in the **Required** column.

To change the text of the participant attribute on the registration page, in the **Caption** field, enter the text to appear.


Note: When you download an event registration, the Online registrant? participant attribute automatically adds on the participant record. You do not view this attribute in the **Attributes** frame or on the Web Transactions page in The Raiser's Edge. After the event registration downloads, this information appears on the Attributes/Notes tab of the participant record. "Online registrant?" appears in the **Category** column, "Yes" appears in the **Description** column, and "Blackbaud Internet Solutions" appears in the **Comments** column.

9. When you include more than one event, **Display order** appears so you can change the event display order. To do this, click and drag an event to the desired location.
10. Under **Additional Donations**, to include an additional contribution field on the event registration page, select **Allow additional donations**. In the field that appears, select the fund to credit for additional donations. The gift is linked to the participant's constituent record, but not directly to the event record.



Additional donations

☒ Allow additional donations

(no Fund selected)  *

Select a fund to assign to that portion of the event registration gift.

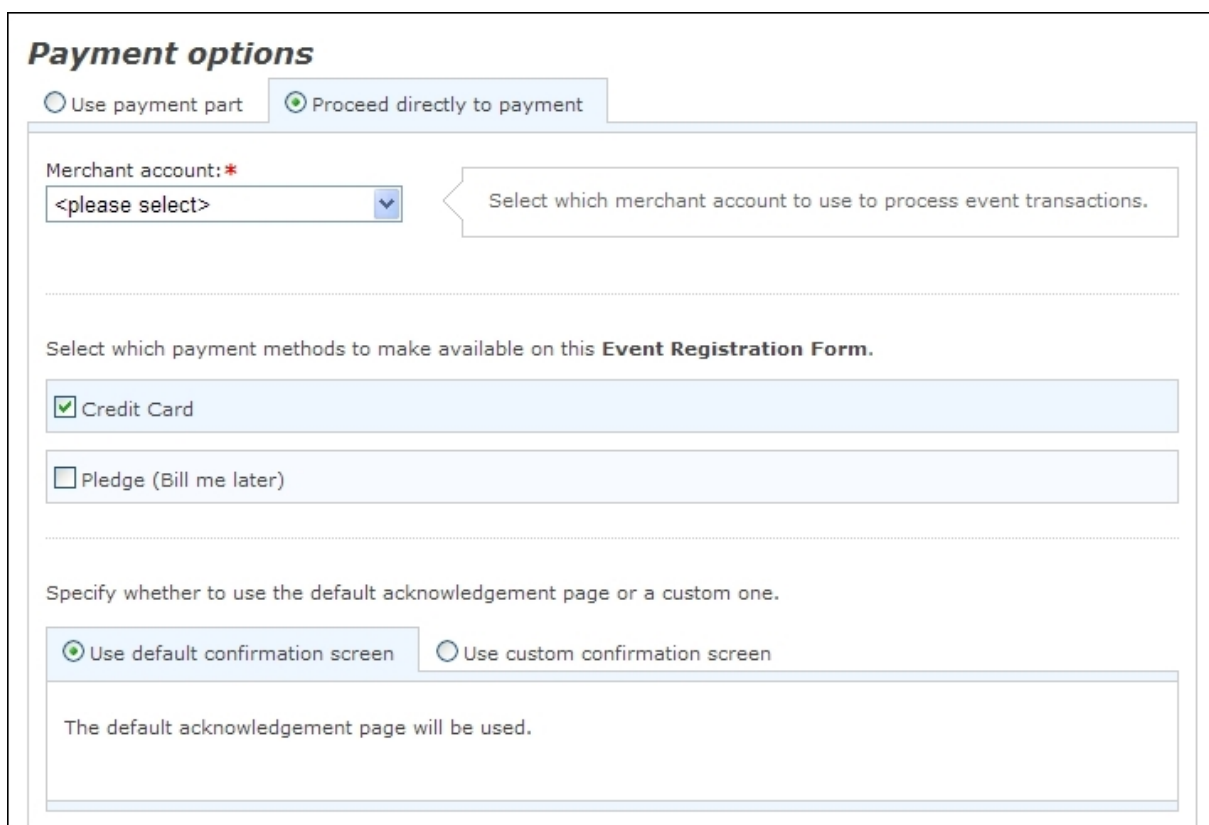
11. Under **Payment Options**, select the payment options for website users.
 - a. To allow website users to pay for multiple transactions at one time, select **Use payment part**. The **Payment** frame appears.

In the **Payment page** field, select the web page to use to process event registrations. The Payment part on the selected page determines the payment methods and merchant account used to process event registrations. For information about the Payment part, see [Payment on page 121](#).

Note: If your payment page uses a Payment 2.0 part, the payment method for it and this part must match. For example, you cannot select a payment page that accepts direct debits because this part only accepts pledges and credit cards.

In the box, enter the text to appear on the payment page after an event registration is added. To format the content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.

- b. To require website users to pay for event registrations one at a time, select **Proceed directly to payment**. Additional options appear.



Payment options

☐ Use payment part
 ☒ Proceed directly to payment

Merchant account: *
 <please select>
 Select which merchant account to use to process event transactions.

Select which payment methods to make available on this **Event Registration Form**.

☒ Credit Card
☐ Pledge (Bill me later)

Specify whether to use the default acknowledgement page or a custom one.

☒ Use default confirmation screen
 ☐ Use custom confirmation screen

The default acknowledgement page will be used.

In the **Merchant Account** field, select the merchant account to use to process credit card transactions received through the event registration form, such as your organization's Blackbaud Merchant Services account.

The system administrator sets up merchant accounts in *Administration*. For more information, see the *Administration Guide*.

Select the payment methods that website users can use on the Event Registration Form. You can select **Credit Card** or **Pledge (Bill me later)**.

Select whether the default confirmation screen or a custom confirmation screen displays the summary after a user registers for an event. If you select **Use custom confirmation screen**, the HTML editor appears and displays the default confirmation screen. Customize the default confirmation screen according to your needs. To format the content's appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields.

Tip: If you customize the default confirmation screen, the customizations remain even if you later select **Use default confirmation screen**. To remove your customizations for the screen, select **Use custom confirmation screen** and click **Restore default content**. The program's default confirmation screen appears in the HTML editor.

12. Click **Next**. The Acknowledgement Email screen appears.

13. Create the email to acknowledge the registration. For information about how to design an email acknowledgement for an event registration, see the *Email Guide*.

For information about event registration loop merge fields, see [Event Registration Loop Merge Fields on page 97](#).

Tip: When you edit an Event Registration Form, you can click **Acknowledgement Email** to access the Acknowledgement Email screen.

14. To enable users to specify their consent preferences for how they want to receive communication from your organization:

- a. Under **Consent part**, select a saved Communication Consent part to include on the form.
- b. Select how you want the communication preference options to display — choose **Inline** to embed the options directly in the form itself or choose **Overlay** to display a pop-up window with the consent options when the form is submitted.

After users submit the form, their consent information is downloaded to the BBNC plugin along with their transaction. After the transaction is processed, their constituent record is updated in The Raiser's Edge with their communication consent preferences. If the user is logged in when they submit the form and their BBNC account is linked to a constituent record in The Raiser's Edge, their communication consent preferences are written directly to their record in The Raiser's Edge.

15. Click **Save**. You return to *Parts*.

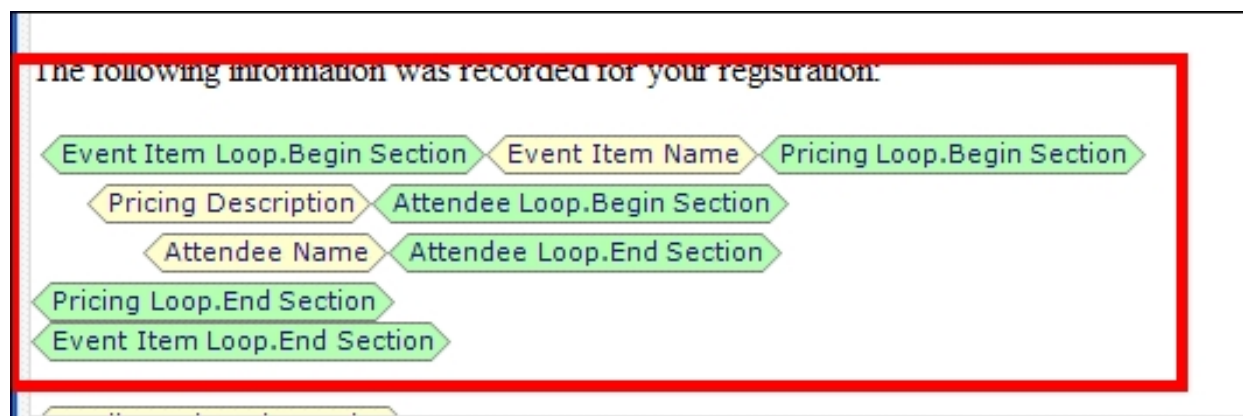
Event Registration Loop Merge Fields

Several merge fields output the same registration data, but in different ways. To merge all registration data into one table without the ability to format and change labels, select the **Registrations Block** merge field. To merge registration data in loops for multiple events, registrant types, and attendees, select the **Event Item** loop merge fields, **Pricing** loop merge fields, and **Attendee** loop merge fields. These loop fields merge data so you can change labels and use format options to customize the information.

For example, you create an email acknowledgement for a golf tournament that includes attendees in the Individual and Family registrant type. When you use the loop merge fields, the program makes the following loops to merge data.

- **Event Item** loop merge fields — The program first checks the number of events to include in the acknowledgement. In this example, there is one loop because your merge includes data for just the golf tournament event.
- **Pricing** loop merge fields — Next, the program merges data through loops for registrant types. In this example, the program makes two loops, one for the Individual type and one for the Family type.
- **Attendee** loop merge fields — Lastly, the program loops the actual list of attendees for each registrant type. This happens multiple times depending on the number of attendees. The program first loops through the Individual registrant type to merge data for the attendee list. Next, the program loops through the Family registrant type to merge data for the attendee list.

Event registration loop fields must be nested in the order they appear in the merge field list. The nesting order is **Event Item** loop fields, **Pricing** loop fields, and **Attendee** loop fields. If you list the fields out of order, for example you list the **Attendee** loop fields outside of the **Event Item** loop fields, or as standalone fields, the data does not merge correctly.



Form Display

Note: The Form Display part is not a standard feature in Blackbaud NetCommunity Spark. To learn how to upgrade Blackbaud NetCommunity Spark to include the part, please email solutions@blackbaud.com.

You use the Form Display part to create a landing page for users to access online forms. With these online forms, you can collect various data from your website users.

Tip: You create forms in *Forms*. For information about how to create and design forms, see *Online Forms Guide*.

On the Form Display part, you select the online forms to include on the web page, enter display names for the forms, and set the display order. You also configure user login options for the web page. To ensure the data you collect is associated with user profiles, we recommend that you require website users must log in to your site to access forms.

On your website, users access the page with the Form Display part to view a list of available forms. To fill out a form, users click a link beside it. A second list on the page displays the forms that users started. In this list, the status of each form appears, along with links to resume, delete, and print the forms.

➤ Design Form Display

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, click **Add Form** under **Forms** to add an entry to the list of forms on the part.

Forms

Select the forms to include on the form landing page. To add a form, click **Add Form**, and then click **Select** under **Form**. Under **Display Name**, enter a form title to display on the page. Under **Action**, use the arrows to adjust the display order, and click Remove to remove a form from the list.

Display Name	Form	Action
<input type="text"/>	(no Form selected)	

2. To select a form, click the binoculars in the **Form** column. The Select a Form screen appears. Locate the form and click **Select**. The form appears in the field.

Note: To save the Form Display part, you must add at least one form to the part. You create and manage forms in *Forms*. If you create a Form Display part before you create the forms for it, you must select an existing form as a placeholder. For information about how to create and design forms, see the *Forms Guide*.

3. Under **Display Name**, enter a name for the form to appear in the list of available forms on your website.
4. Under **Captions and Properties**, select whether to include links for users to request forgotten passwords and user IDs. By default, the program includes links for users to log in or register for the site.

Captions and Properties

Select form titles and hyperlink captions to include. Their contents may be edited via the **Language** tab.

	Enabled
Login	<input checked="" type="checkbox"/>
New User Registration	<input checked="" type="checkbox"/>
Forgotten Password/User ID	<input checked="" type="checkbox"/>
Forgotten Password	<input checked="" type="checkbox"/>
Forgotten User ID	<input type="checkbox"/>

Note: The Form Display part requires you to configure a new user registration email message and a forgotten password/user ID email message. The part requires these email messages even if the forms you include on the part do not require users to log in or register.

To change the text for the links, select the Language tab. For information about the Language tab, see [Language Tab on page 14](#).

5. Under **Constituent Code**, select the constituent code to assign to users who register for your website through this part.

Constituent Code

Constituent Code:

Select a constituent code to assign to users who sign up via this form.

For information about constituent codes, see the *Program Basics Guide*.


6. Under **Navigation**, browse to the web page you want to appear after users log out. If you do not select a page, the home page from the Settings tab in *Sites & settings* appears by default.

Navigation

Select which page to present to the user upon successful completion of the specified task.

Logout:

Sample Default Page

 *

7. Under **Additional Fields**, select the biographical fields to include on the new user registration form. In the grid, select **Include** for each field to include on the form. To make a field required, select **Required**. When you select **Include** for the **Address block** and **Gender** fields, they are automatically required.

Additional Fields

Select which additional fields will be displayed during the user registration process.

Field	Include	Required
Title 1	<input type="checkbox"/>	<input type="checkbox"/>
Address block	<input type="checkbox"/>	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>
Maiden name	<input type="checkbox"/>	<input type="checkbox"/>
Class of	<input type="checkbox"/>	<input type="checkbox"/>
Birth date	<input type="checkbox"/>	<input type="checkbox"/>
ID	<input type="checkbox"/>	<input type="checkbox"/>

8. In the **Role Assignment** frame, select **Member** for each role to assign to users who register for your website through this part.

Role Assignment

Select which roles to assign to users registering or joining via this form.

Role	Member
All Rights	<input type="checkbox"/>
Content Authors	<input type="checkbox"/>
Create Forms	<input type="checkbox"/>
Form Gallery Access	<input type="checkbox"/>
Members	<input type="checkbox"/>
Site Administrators	<input type="checkbox"/>

9. Click **Save**. You return to *Parts*.

Formatted Text and Images

To include text and images from *Image library* on your web pages, such as your organization's mission statement and logo, use the Formatted Text and Images part. You can also use the Formatted Text and Images part to create a footer for your website that includes your webmaster's contact information. On the Content tab of the Formatted Text and Images part, use the HTML editor to create and format the text and images to appear.

On the Options tab, you can specify whether website users can copy the content from your website, such as from a personal page, to use on another web page. For example, the site user can copy the HTML code necessary for the content on her personal page to appear on a social networking profile page, family website, or weblog.

Each new and revised Formatted Text and Images part must pass a content approval workflow to appear on your website. For information about the content approval workflow, see the *Administration Guide*. You can add approved Formatted Text and Images parts to each web page in *Pages & templates*. For more information about how to add content parts in *Pages & templates*, see the *Website Design Guide*.

With *Blackbaud NetAdvocacy*, you can download advocacy action data. This data includes alerts, email information, and attributes. *Blackbaud NetAdvocacy* is used with *Capwiz* subscription service to include pages on your site where users can email influential individuals (such as Congressional, state, and local officials) to encourage their influence on particular causes, such as grant funding for a nonprofit. To include links to landing pages on your website for advocacy functionality, use the Formatted Text and Images part. In addition, when you send advocacy alert email from the website, the advocate's actions automatically link to their record in The Raiser's Edge after the action is complete. For information about how to use *Blackbaud NetAdvocacy* and *Capwiz* and to set up action alerts on your site, see your *Capwiz Site Control* page.

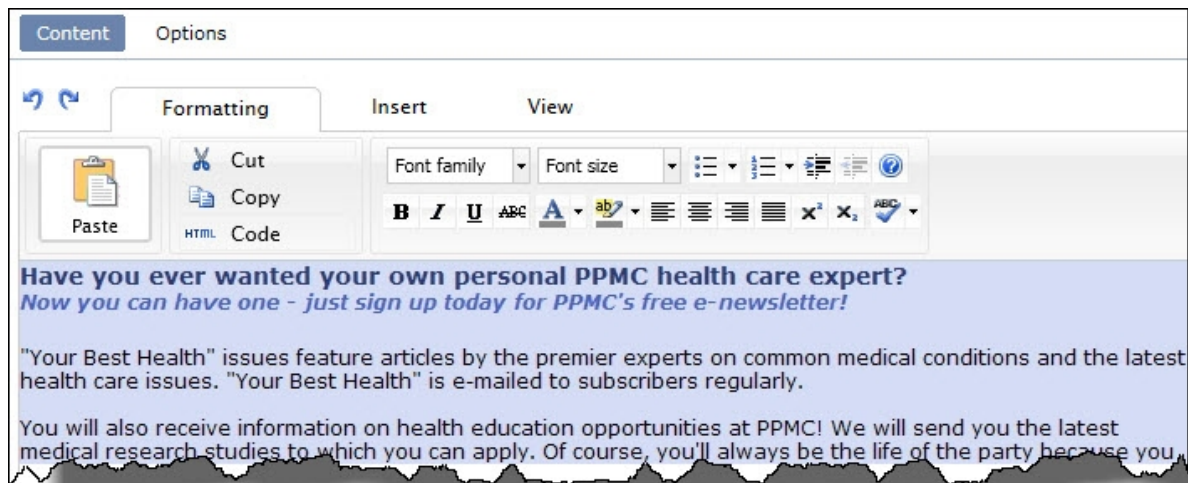
Warning: You cannot use HTML to embed your own form via HTML in a Formatted Text and Images part.

The Formatted Text and Images (Secured) part is the same as the Formatted Text and Images part with the additional ability to secure the page's content using encryption such as Secure Sockets Layer (SSL) or Transport Layer Security (TLS). When the secured part is on a page, the page's URL starts with "https". To design a Formatted Text and Images (Secured) part type, follow the same steps as the Formatted Text and Images part.

➤ Design Formatted Text and Images

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, select the Content tab.



2. In the HTML editor content area, enter the content and format its appearance and layout. For example, you can manually enter or copy and paste your organization's mission statement. For more information about the HTML editor, see the *Program Basics Guide*.
3. To allow site users to copy and paste the content's HTML code:
 - a. Select the Options tab.



- b. Select **Enable HTML code publishing**.
 - c. In the **Help text** field, enter custom text to appear on the web page to help site users understand how and why to copy the HTML code. By default, the message "Copy and Paste the following code where you would normally publish HTML content" appears.
4. Select the content approval workflow to use with the part and its approval status in the workflow.
 - a. On the Edit Part screen, select the Content Approval tab. For information about the items on this tab, see [Content Approval Tab on page 18](#).

Note: Blackbaud NetCommunity Spark does not support workflows, approvals, and the Content approval tab.

Content Approval

Set approval status and workflow for this part.

Approval Status:

Workflow: * denotes default workflow

Activity:

Action	Version	Status	Status Updated On	Status Updated By
	1	Draft	8/6/2009 3:41:50 PM	Supervisor

1 version meets selected criteria

- b. If you have rights to manage workflows, the **Workflow Name** field appears. In this field, select the workflow to apply to the part.

When you create a workflow in *Workflows*, you can select whether it is the default workflow for the selected part type. When you design a part and select its workflow in the **Workflow Name** field, an asterisk (*) appears next to the default workflow. For more information, see the *Administration Guide*.

- c. When you complete the design of the part and its content, in the **Approval Status** field, select "Ready for Approval." Until the part is complete and ready for approval, select the approval status of "Draft."

5. Click **Save**. You return to *Parts*.

Formatted Text and Images (Secured) - (Deprecated)

Note: The Formatted Text and Images (Secured) part is now deprecated. While the deprecated part continues to operate for backwards compatibility on your website, you can no longer create or copy Formatted Text and Images (Secured) parts. Instead, you can use the Formatted Text and Images part.

The Formatted Text and Images (Secured) part is the same as the Formatted Text and Images part with the additional ability to secure the page's content using encryption such as Secure Sockets Layer (SSL) or Transport Layer Security (TLS). When the secured part is on a page, the page's URL starts with "https". To design a Formatted Text and Images (Secured) part type, follow the same steps as the Formatted Text and Images part. For more information, see [Formatted Text and Images on page 101](#).

LinkedIn Group Join (Deprecated)

Note: Due to *LinkedIn* API changes, the LinkedIn Group Join part has been deprecated and no longer works on your website. If the part exists on any of your websites, we recommend you remove it as soon as possible.

Membership Form

Note: The Membership Form part is not a standard feature in Blackbaud NetCommunity Spark. To learn how to upgrade Blackbaud NetCommunity Spark to include online memberships, please email solutions@blackbaud.com.

With the Membership Form part, you can design a membership web page and solicit new members on your website. When you design the membership page, you select the membership categories to advertise online. You can create links to renew existing memberships, allow gifts of membership, and customize your confirmation message for web users.

Note: In *Pages & templates*, we recommend you do not add more than one Membership Form part on a page. We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the page.

From a membership form on your website, users enter the appropriate information for each section of the membership process. The user then clicks **Next** to complete the next section of the membership form.

- Current Membership displays a website user's current membership information. You can select not to display this page on your website.
- Join/Renew contains the available membership categories you select to display on your website.
- Cards/Guest Pass displays the options the user can select to include additional cards or guest passes. You can select not to display this page on your website.
- Transaction displays the member's name and financial information.
- The acknowledgement message displays the message you created on the Membership Form part so the site user can read the message once the membership has been submitted. The website automatically sends an acknowledgement email to the member.

To generate a Membership Form part from the beginning, start with [Design the Current Membership section on page 104](#). After you complete the steps in this procedure, follow the remaining procedures for this part to create your membership form.

Note: If you use The Raiser's Edge *Membership Management*, use the Membership Form part.

➤ Design the Current Membership section

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, in the **Title** field, enter the title for the membership screens on your website, such as "Smith Museum Membership Program."

Note: The **Membership Options** frame affects the Join/Renew page. For more information about this frame, see [Design the Join/Renew section on page 105](#).

2. To display the member's current membership, select **Show Current Membership(s)**.

If you do not select this checkbox, the membership form on your website starts with the Join/Renew section. For more information, see [Design the Join/Renew section on page 105](#).

3. To allow members to view program and subcategory information, select **Include Program** and **Include Subcategory**.
4. In the **Caption** field, enter the text to appear on your website to explain what is being viewed, such as "Your Current Membership Information."
5. In the **Message** box, enter any additional information to provide for website users, such as "If you have questions about your current membership, please contact us at 323-555-5555."
6. In the **Join Button** and **Renew Button** fields, enter the text to appear on each button, such as "Join Now" and "Renew Now," respectively.
7. In the **Program - Category** table, select the membership categories to include on your website. To include a membership category, select the checkbox in the **Show** column. To allow a membership category to be renewed, select the checkbox in the **Allow Renew** column.
8. To display current benefits for your memberships, select **Show Benefits**. To show details of the benefits, select **Show Quantity**, **Show Total Value**, **Show Comments**, or **Show Notes**.

Note: The Raiser's Edge determines the available membership benefits.

If you select **Show Benefits** and a member waives benefits, a message appears on your website to inform the member that the benefits have been waived.

➤ Design the Join/Renew section

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, to allow members to enter comments, select **Allow Comments**. When you select this checkbox, a text box for user comments appears in the Transaction section.
If you mark this checkbox, comments appear in the **Comment** field on the Membership tab on a membership record.

Note: The Join/Renew section displays the available membership categories you select for your website. This way, a website user can select the membership to join or renew from the available categories in the list.

Note: If you do not display the Current Membership section, your member cannot renew a membership on your Membership Form part. For more information about Current Membership, see [Design the Current Membership section on page 104](#).

2. To allow matching gifts, select **Allow Matching gifts**. Site visitors can select **My company will match my gift** and enter the company name in the **Company** field. If you use *MatchFinder Online*, a **Look it up** link appears next to the checkbox. Visitors click the link to access *MatchFinder Online* and search for the company. *MatchFinder Online* contains information about matching gift companies, such as the minimum and maximum gift details and match ratio.

Data from *MatchFinder Online* integrates with The Raiser's Edge. For information about *MatchFinder Online* purchasing options, send an email to solutions@blackbaud.com.

For information about how to download matching gift information, see the *Blackbaud*

NetCommunity Spark & The Raiser's Edge Integration Guide. For information about matching gifts in The Raiser's Edge, see *The Raiser's Edge Gift Records Guide*.

3. To renew memberships on your website, select **Allow the donor to automatically renew a membership**.

When you select **Allow the donor to automatically renew a membership**, an **Auto Renewal** section appears. If the website user selects direct debit for the payment method, the **Starting on** field appears. For more information about processing renewal memberships automatically, see the *Blackbaud NetCommunity Spark & The Raiser's Edge Integration Guide*.

Tip: When you select **Allow pledge installment gifts** and a user creates a pledge and defines a pledge installment schedule, the **Auto Renewal** information no longer appears.

4. In the **Donor message** box, enter a message to appear on the website to notify users the automatic membership renewal option charges direct debits and credit cards for future renewals. For example, you can enter "By selecting this option, I understand that my account is charged automatically when my membership expires."
5. To allow members to create a pledge and define a pledge installment schedule, select **Allow pledge installment gifts**. An **Installments** option appears under **Type of gift** on the membership form. When a member selects **Installments**, a **Number of Installments** field and frequency options appear on the membership form.

Note: Members cannot enter a number that goes beyond the term of the membership in the **Number of Installments** field. For example, a member cannot select to pay an annual membership in 15 monthly installments; the member may enter only 1 through 12 in the field.

To allow the member to determine the frequency of the pledge payments on the membership form, select **General**. Members can select to make payments in weekly, monthly, quarterly, or yearly installments.

To define the pledge installment schedules members can choose, select **Specific**.

- a. Select "Weekly," "Monthly," "Quarterly," or "Annually" as the frequency.
- b. In the **On** field, select a day or date members can choose to schedule the installments.

Tip: If a constituent donates a recurring gift and selects a start date that is not today's date, the transaction downloads to The Raiser's Edge. However, the transaction is not sent to your bank merchant when the donor submits the recurring gift. The merchant receives the transaction from the batch output you send to your bank for processing from The Raiser's Edge. For more information about bank merchants, see the *Administration Guide*.

- c. To add multiple frequency options to the membership form, enter each custom schedule and click **Add Frequency** to add the new schedule to the list. The selections you make appear in the **Frequency** grid on the web page.

The program calculates the installment amount and end date based on the number of installments, frequency, and date the member specifies and displays this information on the donation page. For example, a member may contribute \$100 in four monthly installments and select to pay each installment on the first day of the month beginning January 1. This generates four scheduled payments of \$25 ending April 1. No installment payments occur after the end date.

Note: If the number of installments for the pledge does not result in equal payment amounts, the final scheduled payment contains the remainder. For example, a \$100 pledge with three installments has two payments of \$33.33 and a final payment of \$33.34.

Warning: If a constituent selects a pledge installment start date that is not today's date, the transaction is sent to the merchant account when the gift is processed. For more information about bank merchants, see the *Administration Guide*.

Note: The **Show Current Membership(s)** options appear in the Current Membership section. For more information about these options, see [Design the Current Membership section on page 104](#).

6. Under **Required Fields**, select the checkbox for each donor field to require on the donation form. To ensure you download complete constituent information, we recommend that you make all fields required.
7. Under **Additional fields**, select the additional fields to include on the form.
 - a. In the **Include** column, select the checkbox for each additional field you want to appear on the form. If you require a field, you must also include it.
 - b. In the **Required** column, select the checkbox for each additional field website users must complete to submit the form.
8. In the **Constituent Code** field, select a constituent code to add for new members. Your website users do not view the constituent code, but you can download it. For more information, see the *Program Basics Guide*.
9. To allow website users to purchase gifts of membership, select **Allow gifts of membership**. You can select a constituent code for these membership recipients and allow the donor to decide whether the member or the donor receives the benefits and renewal notices. You can also include a text box on your website so donors can include a special message for the gift of membership recipient.

When you download the membership to The Raiser's Edge, the gift of membership message appears on the site user's membership record in the **Special message** field. This field can contain 255 characters in The Raiser's Edge.

10. To include an additional contribution field on the membership page, select **Allow additional donations**. In the grid that appears, click the binoculars in the **Fund** column to select a fund. In the **Display name** column enter the fund name. To include a **Designation** field so participants can select from a list of funds, click **Add designation** and select a fund for each option. In the **Default** column, select the checkbox for the fund to use when the user does not select a fund. The gift links to the participant's constituent record, but not to the membership record.

Note: You can allow users to select from a list of up to twenty five funds.

11. In the **Button Text** field, enter the text to appear on the button for users to click to purchase a gift of membership, such as "Give a gift of membership."

Note: The button that users click to purchase gifts of membership appears in the Current Membership section. When users click this button, the Join/Renew section appears.

12. When you select **Allow additional donations**, an additional contribution field appears on your website. For members who contribute an additional donation, in the **Fund** field, select the fund to credit.

To include the Gift Aid option, select **Allow Gift Aid capture**. The Gift Aid option displays beneath **Make an additional donation** on the Membership Form. If desired, edit the default text in the **Gift Aid checkbox label**, **Gift Aid checkbox text**, and **Gift Aid confirmation label** fields.

13. To track why a website user joins the membership, select **Include Join Reasons**. Select the reasons to show as possible answers for your website users, such as **Interested in supporting the program**.

Note: The Raiser's Edge determines the available join reason information.

14. To track why a website user renews a membership, select **Include Renew Reasons**. Select the reasons to show as possible answers for your website users, such as **Special Interest**.
15. In the **Join Message** box, enter a message that appears when the website user clicks your join button, such as "Welcome to the ABC Museum!"
16. In the **Renew Message** box, enter a message that appears when a website user clicks your renew button, such as "Welcome Back!"
17. In the **Submit Button** field, enter the text to appear on your submit button, such as "I want to join now!"

➤ Design the Transaction section

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, under **Memberships to Include**, select the membership to appear on your website.

Note: The Transaction section displays options for your member to join or renew a membership, request additional cards and guest passes, and view benefit information.

Note: When a website user completes the Transaction section before the membership card information.

- a. Click **Insert New**. The Membership Categories screen appears.
- b. Beside the membership category to include on your website, click **Select**. The Membership Categories screen closes, and you return to the Membership Form part.

Note: You must add each membership category separately for your Membership Form part.

To remove a membership category from your website, click **Remove** next to the category name selected in the **Membership Category** field.

2. For each membership category you select, membership category data appears on the Membership Form part design screen. The Raiser's Edge stores this data. View the integrated data and select whether to include the program and subcategory information (if it exists) on your website, enter a text message, and enter a dues amount.
3. Select **Allow member to specify the card/guest pass information** so members can request additional cards and guest passes.

Note: An individual membership Cards/Guest Pass section on your site uses the information created in this procedure. If you create the Membership Form part for the first time, the information in this

section does not appear on the Membership Form until you select a membership in the **Memberships to Include** frame.

Note: Card and guest pass creation is not a one time task for the Membership Form. To provide this for your website users, you must create card and guest pass information for each membership category included on your Membership Form.

4. In the **Message** box, enter the text to appear for the website user to read, such as the maximum number of cards each primary member should have.
5. Enter the number of additional cards available to the member in **Maximum no. of cards for primary member**.
6. To allow members to identify who the additional cards or guests are, select **Allow member to specify the names and relationships of additional members**.

You can designate the maximum number of additional members in the **No. of additional members** field and select the relationship types to include as options for your website users. The Raiser's Edge determines the available relationship types.

7. Select the fund to credit the dues amount.
8. To allow your members to view subcategory information, select **Include Subcategories**.
9. In the **Caption** field, enter the text to appear on your website to inform the member that the subcategory is being viewed, such as "Membership Subcategory."

Select the checkbox for each subcategory you want to appear on your website. The offline membership record determines the available subcategories.

10. Select the benefits included with this membership category.

Benefits appears next to the membership category on your website. To view benefit details, the site user can click this link.

11. Select **Show Quantity**, **Show Total Value**, and **Show Comments** to display these details for the benefits of your membership categories. The Raiser's Edge determines the available membership benefit information.

12. In the **Benefits Form Message** box, enter the text to appear on the Benefits screen. When a user clicks **Benefits**, the text appears on the screen that appears under the membership category name.

13. To display benefit notes on the Benefits screen, select **Show Benefit Notes**. In the view only box, the benefit notes text from the membership record in The Raiser's Edge displays.

14. Under **Payment Options**, select whether to allow website users to pay for memberships with other transactions, such as donations or event registrations.

- a. To allow website users to pay for multiple transactions at one time, select **Use payment part**. The **Payment** frame appears. In the **Payment page** field, select the web page to use to process donations. The Payment part on the selected page determines the payment methods and merchant account used to process memberships. For information about the Payment part, see [Payment on page 121](#).

In the box, enter the text to appear on the payment page after a membership is added. To format the content's appearance and layout, use the HTML editor. For more information

about the HTML editor, see the *Program Basics Guide*.

- b. To require website users to pay for memberships one at a time, select **Proceed directly to payment**. The **Confirmation Screen**, **Merchant Account**, and **Payment Methods** frames appear. Enter the necessary information in these frames, as described in the following steps.
15. Under **Confirmation Screen**, select options for the membership summary that appears after a user submits a membership.
 - a. To use the program's default confirmation screen, select **Use default confirmation screen**.
 - b. To customize a confirmation screen, select **Use custom confirmation screen**. The HTML editor appears. The program's default confirmation screen appears in the HTML editor for you to customize according to your needs.

In the box, edit the content to appear for the membership summary. To format the content's appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields. For more information, see the *Program Basics Guide*.

Tip: Customizations for the confirmation screen remain even if you select **Use default confirmation screen**. To remove your customizations for the screen, select **Use custom confirmation screen** and click **Restore default content**. The program's default confirmation screen appears in the HTML editor for you to customize again.

16. Under **Merchant Account**, select the merchant account to use to process credit cards, such as your Blackbaud Merchant Services account.

The system administrator sets up merchant accounts in *Administration*. For more information, see the *Administration Guide*.

17. Under **Payment Methods**, select the payment methods to offer to website users.
18. Click **Next**. The Acknowledgement Email screen appears.
19. Create an acknowledgement email for website users who use the membership form to join or renew a membership. You can use the default text provided or enter different text.

Tip: When you edit a Membership Form, you can click **Acknowledgement Email** to access the Acknowledgement Email screen. For information about how to design an email to acknowledge a membership transaction, see the *Email Guide*.

20. To enable users to specify their consent preferences for how they want to receive communication from your organization:

Consent

The Communication Consent part allows website users to specify their consent preferences for how they want to receive communication from your organization.

Consent part:
 Communication Consent Part ▼

Select how to display the consent options: ?

☐ Inline
☒ Overlay

- a. Under **Consent part**, select a saved Communication Consent part to include on the form.
- b. Select how you want the communication preference options to display — choose **Inline** to embed the options directly in the form itself or choose **Overlay** to display a pop-up window with the consent options when the form is submitted.

After users submit the form, their consent information is downloaded to the BBNC plugin along with their transaction. After the transaction is processed, their constituent record is updated in The Raiser's Edge with their communication consent preferences. If the user is logged in when they submit the form and their BBNC account is linked to a constituent record in The Raiser's Edge, their communication consent preferences are written directly to their record in The Raiser's Edge.

21. Click **Save**. You return to *Parts*.

Menu (Deprecated)

Warning: The Menu (Deprecated) part was replaced with the more powerful Menu part. The Menu (Deprecated) part type appears in *Parts* only if you have saved Menu (Deprecated) parts. While the deprecated part continues to operate for backwards compatibility on your website, you can no longer create or copy Menu (Deprecated) parts. The Menu part includes all the functionality of the Menu (Deprecated) part. In addition, the Menu part supports standards for Website Accessibility (WAI) and includes a number of standard style options without the use of CSS. It also includes an import tool to help upgrade your Menu (Deprecated) parts. For more information, see [Menu on page 111](#).

Menu

With the Menu part, you can create a menu and a popup menu for your website. For example, when you visit Blackbaud's website and hover over the **Products** menu, a popup menu appears. The popup menu includes menu items such as **Internet Solutions** and **Fundraising**. You can create a similar menu for your website using Menu.

Note: Some mobile devices do not support popup menus. If you use popup menus on your website,

we recommend that you also create an alternate menu for mobile devices. In *Layouts*, you can insert a content placeholder pane for the menu with popups on a layout for desktop browsers. And on a layout for mobile devices, you can insert a content placeholder pane for the menu without popups. You can then select the layouts for a template and place only the appropriate Menu part in each pane. This way, only the correct menu will appear in desktop browsers and mobile devices. For information about how to create layouts and select them for templates, see the *Website Design Guide*.

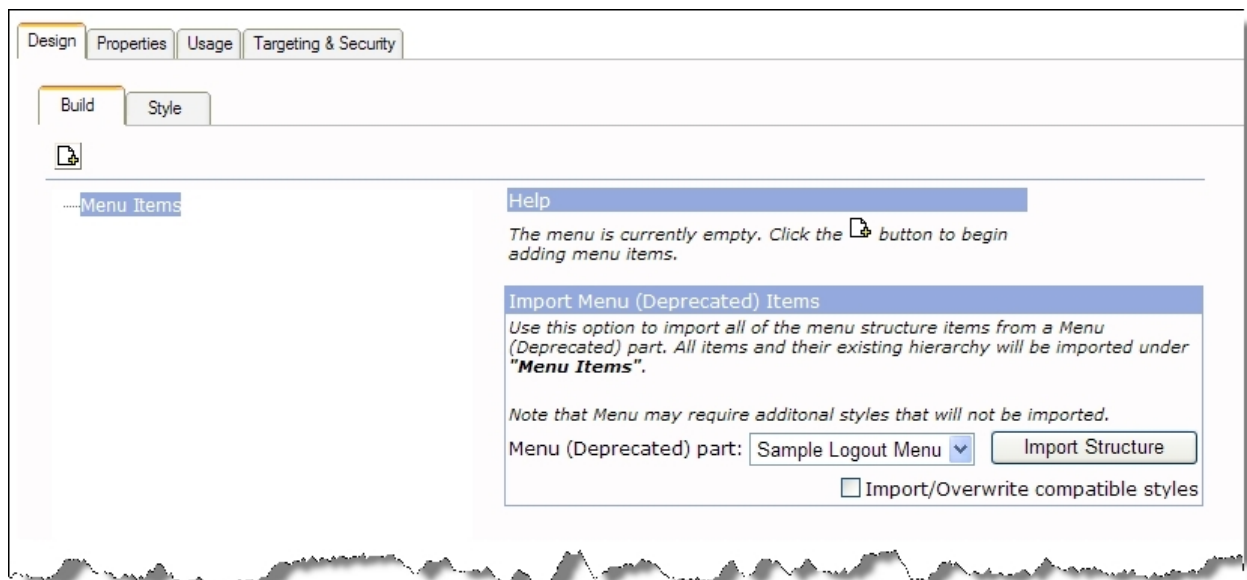
You create the Menu part in two steps. One step is to add the menu definitions, such as **Home** and **About Us**. For each main menu item, you can define popup menu items. The second step is to create the style and format for the menus using tables or an unordered list. For table-based menus, you can select a color and font size to appear for a menu item when a website user hovers over the menu item. You select standard CSS style options easily on the Edit Part screen in fields such as **Border color** and **Font color**. You can also create custom styles if necessary. For menus based on unordered lists, you assign the custom class for the menu.

Note: You can add log in and log out links to your menu. On the menu part for the log in link, use the **Create link to special page** option to select a page that includes a User Login part. For the log out link, use the **Create link to Blackbaud NetCommunity Spark page** option to select the log out page that includes the User Login part. Users view these links in the menu based on whether they are logged in or out.

➤ Upgrade a Menu (Deprecated) part

To upgrade a Menu (Deprecated) part for Website Accessibility and more style options, import the part in a Menu part. When you upgrade a Menu (Deprecated) part, be aware that some style options may not convert to Menu. Also, additional styles may be required for Menu. We recommend you fully test a converted menu and re-create style options if necessary.

1. From the Design tab, select the Build tab. The **Import Menu (Deprecated) Items** frame appears.



2. In the **Menu (Deprecated) part** field, a list of the existing Menu (Deprecated) parts appear. Select the Menu (Deprecated) part to upgrade to Menu.
3. To import CSS styles from the Menu (Deprecated) part, select **Import/Overwrite compatible styles**. If you do not select this checkbox, only the menu items and structure upgrade to Menu.
4. Click **Import**. The Menu (Deprecated) part upgrades to Menu.
5. Select the Style tab. The **Styling Options** frame appears. For more information about these options, see [Design a Menu definition on page 113](#).
6. Click **Save**. You return to *Parts*.

➤ Design a Menu definition

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

Show Me: Watch a video about [how to add a web page to a menu](#).

1. From the Design tab, select the Build tab.
2. To add a menu item, click **Add item**. The menu item appears under the top-level parent menu item, and the **Menu item properties** frame appears.

The screenshot shows the 'Build' tab of a menu editor. On the left, a tree view shows 'Menu items' with a sub-item 'New menu item'. An 'Add item' button is in the top right of the tree. On the right, the 'Menu item properties' panel is visible, containing the following fields and options:

- Label:** A text input field containing 'New menu item'.
- Tooltip:** An empty text input field.
- Link:** An empty text input field with a binoculars icon to its right.
- Target window:** An empty text input field.
- Styling class:** An empty text input field.
- [Apply to sibling menu items](#)
- [Apply to all menu items at this level](#)

Tip: To rearrange menu items, select them and click the arrows.

- a. In the **Label** field, enter a menu item name to display in the menu.
- b. In the **Tooltip** field, enter a description to display when the cursor hovers over the menu item.
- c. In the **Link** field, click the binoculars to link the menu item to a web page. The Create Page

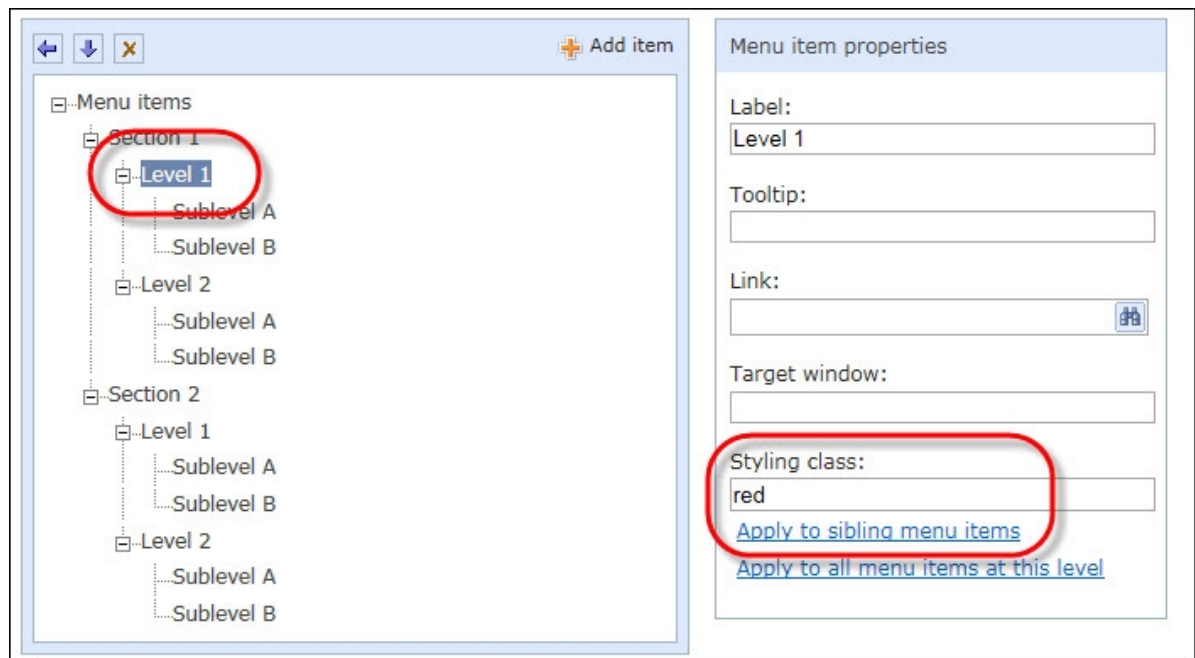
Link screen appears. For information about how to create a page link, see the *Program Basics Guide*.

- d. If you enter a window in the **Open in another window named** field on the Create Page Link screen, the **Target window** field displays the name of the window. To change the window, click the binoculars in the **Link** field.
- e. If you select **Use unordered list menu** on the Style tab, the **Styling class** field and two links appear. In the **Styling class** field, enter the class name from your style sheet for the menu item. For example, you can enter "red" or "blue" to change the item's color.

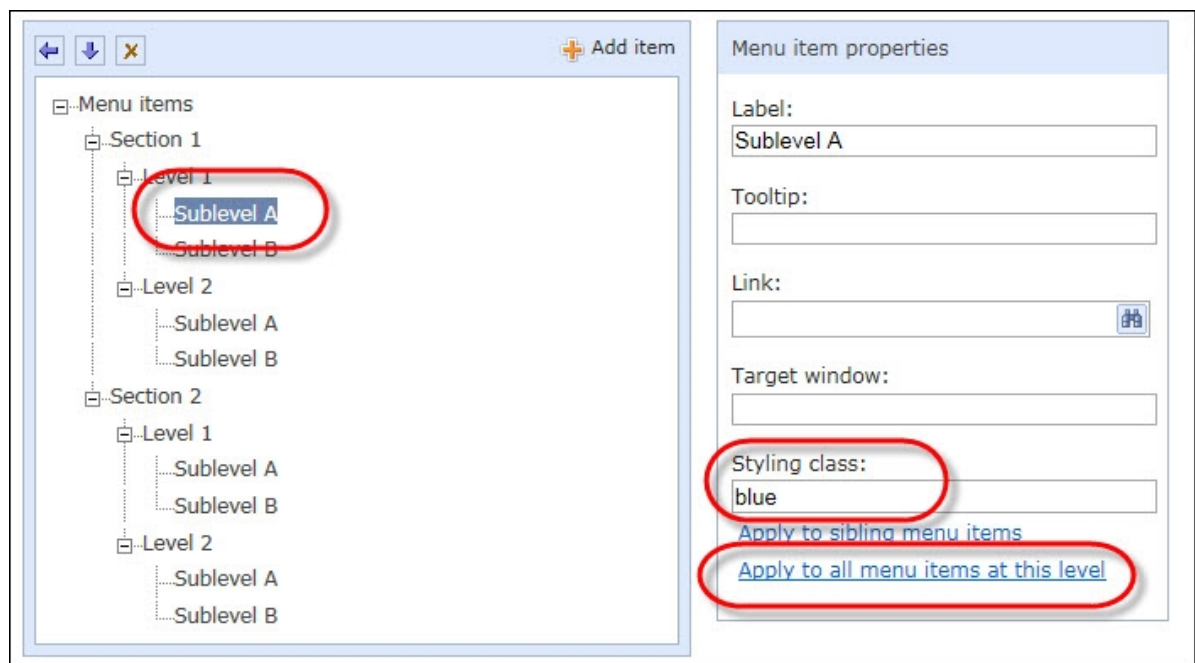
For more information about style sheets, see the *Website Design Guide*.

- To apply the class to sibling menu items *within the same menu node*, click **Apply to sibling menu items**.
- To apply the class to *all menu items in the part on the same level*, click **Apply to all menu items at this level**.

For example, enter "red" for Level 1 and click **Apply to sibling menu items**.



Then enter "blue" for Sublevel A and click **Apply to all menu items at this level**.



On your web page, the Level items are red in Section 1 only. Level items in Section 2 are not because you only applied the style to siblings within the same node. All Sublevel items are blue because you applied the style to all items on the same level regardless of the parent node.

- Section 1
 - Level 1
 - Sublevel A
 - Sublevel B
 - Level 2
 - Sublevel A
 - Sublevel B
- Section 2
 - Level 1
 - Sublevel A
 - Sublevel B
 - Level 2
 - Sublevel A
 - Sublevel B

3. To add an additional menu item, click **Add item**, and repeat the steps in this procedure. You can add as many menu items as necessary.
4. On the Style tab, select whether to style the menu with tables or with an unordered list formatted by CSS.
5. To style the menu with tables, select **Use table-based menu**.

Build
Style

☒ Use table-based menu
☐ Use unordered list menu

Category:
General

Select whether to apply style options to the entire menu, submenus, menu items or submenu items. For example, select "Main Menu" to apply a background color to the entire menu, and select "Main Menu Selected Item" to apply a background color to menu items after users select them.

Orientation:
Vertical
Text wrap:
No

Display popup image on main menu:
No
Display popup image on submenus:
Yes

Static levels:
1
Static level indent:
20px

Preview background color:
#ffffff (White)
Custom glyph:

No image selected

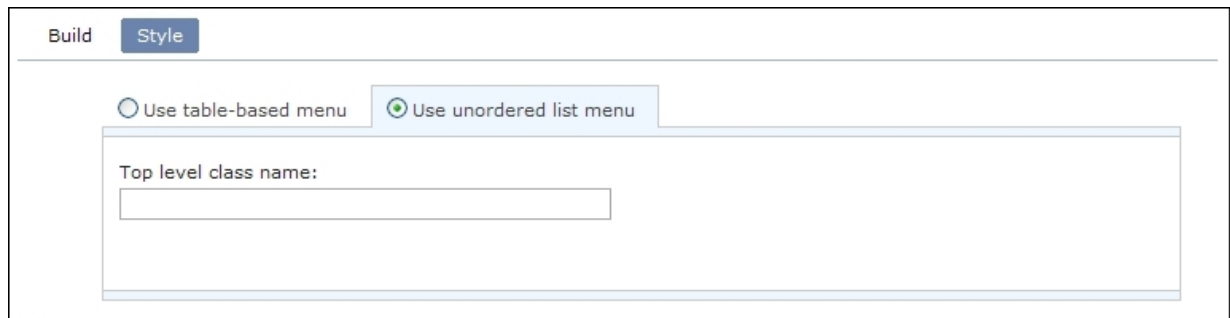
Preview:

Apply changes

- In the **Category** field, select a style category to apply style options. For information about the style categories, see [Style Categories for the Menu on page 120](#).
- To create a custom class for CSS style options, select **Enable custom CSS**.
In the **Custom class** field, enter a custom class such as ".navMenuItem." You enter the CSS for the custom class in *Style sheets*. For information, see the *Website Design Guide*.
- To select standard CSS style options, select **Enable standard CSS**.

The available style options depend on the style category. For information about the standard CSS styles, see [Standard CSS Style Options for Menu on page 118](#).

- d. After you select style options for a style category, select another style category. The program saves your changes.
6. To style the menu with an unordered list formatted by CSS, select **Use unordered list menu**.



7. In the **Top level class name** field, enter the custom class name. You enter the CSS for the custom class in *Style sheets*.
For information, see the *Website Design Guide*.
8. Click **Save**. You return to *Parts*.

Standard CSS Style Options for Menu

Standard CSS style options vary depending on the category you select. Refer to the following tables for standard CSS styles for each Menu category. For information about applying standard CSS style options, see [Design a Menu definition on page 113](#).

Style category: General

Orientation	Display popup image on submenus
Static levels	Custom glyph
Static level indent	Preview background color
Display popup image on main menu	Text wrap

Style category: Main Menu or Popup Menu

Background color	Font size
Border color	Font underline
Border style	Font color
Border width	Height
Bold	Horizontal padding
Italic	Vertical padding
Font name(s)	Width

Style category: Main Menu Item or Popup Menu Item and Main Menu Selected Item or Popup Menu Selected Item

Background color	Font size
Border color	Font underline
Border style	Font color
Border width	Height
Bold	Item spacing
Italic	Width
Font (names)	

Style category: Main Menu Item Hover or Popup Menu Item Hover

Background color	Font name(s)
Border color	Font size
Border style	Font underline
Border width	Font color
Bold	Height
Italic	Width

Style Categories for the Menu

In the **Category** field of the Menu part, you select style categories to apply style options. Style categories include the various menu types. This table describes the available style categories.

Style Category	Description
General	This applies to your entire menu. For example, Blackbaud's menu is horizontal at the top of every web page.
Main Menu	This is your main menu. For example, Home , Products , and Services are a part of the main menu on Blackbaud's website.
Main Menu Item	This is your main menu in its natural state. For example, you browse Blackbaud's website, but you are not currently hovering or clicking a menu item.
Main Menu Item Hover	This applies to a main menu item when a user hovers the cursor over it. For example, when you hover the mouse over Blackbaud's Products menu item, the menu button changes to a darker shade of grey.
Main Menu Selected Item	This affects a main menu item after a user clicks it. For example, when you click Blackbaud's Products menu, you land on the Products page and the Products menu button has a bright yellow background to indicate it is for the current web page.
Popup Menu	This applies to your popup menu. For example, when you hover over Blackbaud's, Products menu, a popup menu appears with menu items such as Fundraising , Forms , and Solutions by Industry .
Popup Menu Item	This is your popup menu in its natural state. For example, you hover over Blackbaud's Products menu to view the items on the popup menu for it, but you are not currently clicking or hovering over a popup menu item.

Style Category	Description
Popup Menu Item Hover	This applies to a popup menu item when a user hovers over the popup menu item. For example, you hover your mouse over Blackbaud's Fundraising popup menu item. When you do this, the popup menu button changes to a lighter shade of blue.
Popup Menu Selected Item	This affects a popup menu item when a user navigates to the web page for that menu item. For example, you click Blackbaud's Fundraising popup menu item. You land on the Fundraising page. You can select to style the Fundraising popup menu button with a bright yellow background to indicate to a user he or she is on the web page for that popup menu item.

Payment

With the Payment part, website users can pay for multiple transactions with a single charge. For example, when a user registers for an event, makes a donation, or renews a membership, the program adds the transactions to a payment page. If the user leaves the website without paying, the transactions remain on the payment page. To clear unpaid payment pages that have not been modified within a specified time period, you can set an expiration date.

Note: Anonymous website users can create payment pages. When an anonymous user adds a transaction to a payment page, the page remains after the user leaves the website. To identify anonymous users, the program uses cookies. To access a payment page, an anonymous user must use the same computer used to add the transactions. If multiple anonymous users add transactions from the same computer, the program adds the transactions to the same payment page.

You can use a payment page with the Donation Form, Event Registration Form, and Membership Form parts. To create a payment page, you add a Payment part to a web page. You can then link the payment page to each form part. For information about the Donation Form part, see [Donation Form on page 32](#). For information about the event registration form, see [Event Registration Form \(Classic\) on page 86](#). For information about the membership form, see [Membership Form on page 104](#).

When you add a payment page to a donation form, event registration form, or membership form, the user does not proceed directly to payment. Instead, the program adds items to the payment page. When the user clicks **Continue** on the form, the payment page appears with the new item. The Payment part determines the available payment methods and the merchant account. To provide a link on your website for users to access payment pages without adding items, use the Payment Summary part. For information about the Payment Summary part, see [Payment Summary on page 124](#).

Note: To design, style, and test a part on your website without creating transactions, generating emails, or communicating in any way with Blackbaud Services or The Raiser's Edge, select **Test Mode** on the Properties tab. For example, you can complete the fields on a Payment form to ensure the confirmation page is styled and working properly. Although you submit the payment and receive a confirmation, a transaction does not appear on the NetCommunity page in The Raiser's Edge. Use Test mode to verify the user's experience, *not* to test data processing. Test mode does not validate credit card numbers and merchant accounts. Only users with supervisor rights can view parts in Test mode.

> Design Payment

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, under **General**, set an expiration date for payment pages.
 - To clear unpaid payment pages that website users have not modified, select **Clear unpaid transactions** and enter the number of days to wait before you clear the pages.
 - To keep all payment pages regardless of when last modified, select **Never clear unpaid transactions**.

General

Select whether to automatically clear unpaid transactions after an expiration period.

☒ Clear unpaid transactions days after the transaction group was last modified

☐ Never clear unpaid transactions

When viewing the pending transactions, the payment form can be displayed immediately or after clicking 'Checkout'.

☒ Display the payment form after clicking 'Checkout'

☐ Display the payment form immediately

Specify whether to send a summary acknowledgement email.

☒ Send the acknowledgement email defined for Donations, Event Registrations, Memberships or eCards that use this payment part

☐ Send summary acknowledgement email

2. Select when to display the payment form for users to enter payment information.
 - To display the payment form on the payment page, select **Display the payment form immediately**.
 - To display the payment form on a separate page, select **Display the payment form after clicking 'Checkout'**.
3. You can determine if a donor receives a summary email to acknowledge one or more payments made with this Payment part or individual acknowledgement emails for each payment.
 - To send a summary acknowledgement email for donations, event registrations, and memberships a donor pays for with this Payment part, select **Send summary acknowledgement email**.

Note: From a Donation, Event Registration, or Membership part, you can choose to always send the acknowledgement email defined for the part. If you add a Payment part with **Send summary acknowledgement email** selected to one of these parts, the donor receives the acknowledgement email you designed for the donation, event registration, or membership payment, as well as the summary acknowledgement email you defined for the Payment part.

- To send donors an acknowledgement email for each payment, select **Send the acknowledgement email defined for Donations, Event Registrations, or Memberships that use this payment part**.

4. Under **Required Fields**, select the checkbox for each donor field to make required on the payment page. To ensure you download complete constituent information, we recommend that you make all these fields required.

Required fields
Specify whether the following fields are required.

☐ First name

☐ Title

☐ Phone

5. Under **Additional fields**, select the additional fields to include on the payment page.
 - a. In the **Include** column, select the checkbox for each additional field you want to appear on the payment page. If you require a field, you must also include it.
 - b. In the **Required** column, select the checkbox for each additional field website users must complete to submit their payments.

Tip: We recommend you include **Middle name** so your organization meets the Canadian Revenue Agency's requirements for donation receipts.

6. Under **Payment Methods**, select the payment methods to offer to website users.

Payment methods
Select which payment methods the user will be allowed to choose from at checkout.

☒ Credit card

☐ Direct Debit

☐ Pledge (Bill me later)

Merchant account: *
<please select>

Select which internet merchant account to use to process donation transactions.

7. Under **Merchant Account**, select the merchant account to use to process credit cards. For example, select your IATS account. The system administrator sets up merchant accounts in *Administration*. For information, see the *Administration Guide*.
8. Click **Next**. The Acknowledgement Email screen appears.

The screenshot shows an email creation form with the following fields and options:

- Name:** test Acknowledgement *
- Subject:** test Acknowledgement *
- From Address:** *
- From Name:** *
- Reply Address:**
- Notifications are to be sent to the following address**
- Failures:** ☐
- Hide Options** button
- Rich Text Editor:** Includes a toolbar with icons for undo, redo, bold, italic, underline, text color, background color, link, unlink, list, indent, outdent, and a text area with the following content:

Dear **First Name**,

Thank you for your contribution of **Summary Gift Amount** to our organization. The advancements we have made can be attributed in many ways to people like you who have generously supported our mission. We are grateful for your generosity and hope that you will take great pride in the important difference that your contribution makes.

Below is a summary of your contribution:

Donation.Begin Section **Gift Information:** **Donation Begin Loop**

Amount: **Gift Amount**

Designation: **Designation**

Recurring Information.Begin Section

Frequency

Path:

9. Create an acknowledgement email for website users who make a payment with this Payment part. You can use the default text provided or enter different text. For information about how to design an email acknowledgement, see the *Email Guide*.

Note: You must select **Send summary acknowledgement email** under **General** for donors to receive the summary email you create for the Payment part. For information about how to send both a summary and individual acknowledgement emails, see the *Email Guide*.

The summary acknowledgement email includes loop merge fields for donations, memberships, and event registrations. For information about how to use loop merge fields, see [Event Registration Loop Merge Fields on page 97](#).

Tip: When you edit a Payment part, you can click **Acknowledgement Email** to access the Acknowledgement Email screen. For information about how to create this email message, see the *Email Guide*.

10. Click **Save**. You return to *Parts*.

Payment Summary

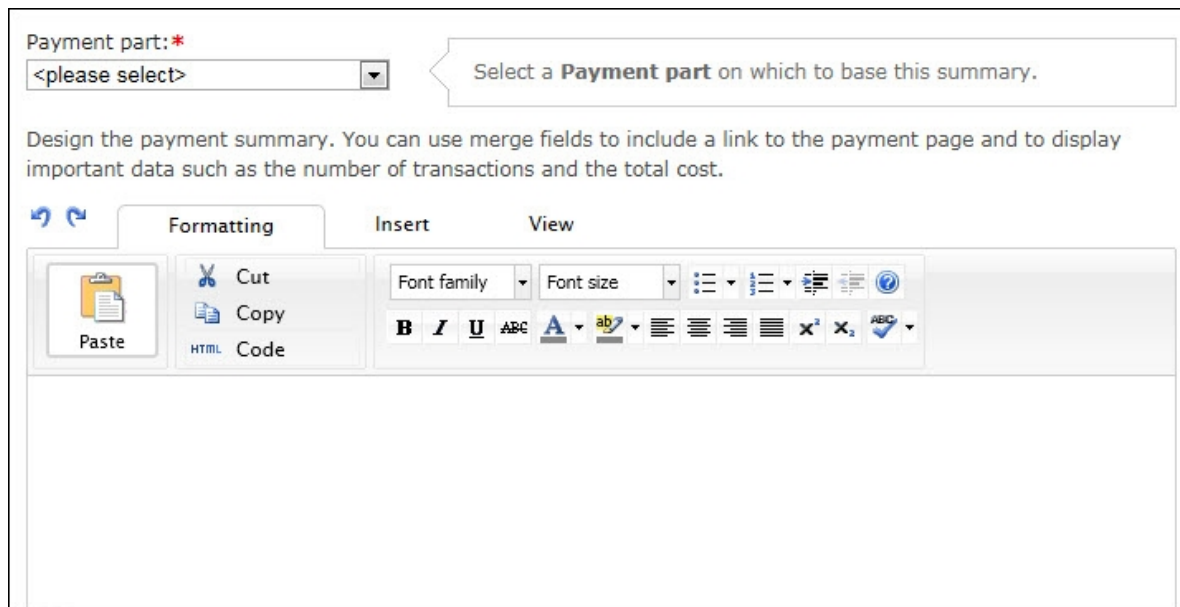
With the Payment Summary part, website users can view useful information about their payment pages. The payment summary can display the number of items on a payment page and the total cost for the items. It can also provide a link to view the payment page and pay for transactions. When you add a link and place the summary on a page template, a website user can access the payment page from any web page that uses that template. You can also use merge fields to create two versions of the summary: one for an empty payment page and one for a page with transactions.

When you create a payment summary, you select a Payment part to connect to the summary. For information about the Payment part, see [Payment on page 121](#).

➤ Design Payment Summary

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, in the **Payment part** field, select the Payment part to connect to the summary.



2. Under **Display text**, enter the text to appear in the payment summary. You can use merge fields to display the number of transactions on a website user's payment page and the total cost, as well as to provide a link to the page. You also can use merge fields to create conditional statements that appear according to whether the payment page contains transactions. To format the content's appearance and layout, use the HTML editor.

For more information about the HTML editor, see the *Program Basics Guide*.

3. Click **Save**. You return to *Parts*.

Payment 2.0

With the Payment 2.0 part, website users can pay for multiple transactions with a single charge. For example, when users register for events, make donations, or renew memberships, the program can add the transactions to their shopping carts. If users leave the website without paying, the transactions remain in the shopping carts.

Note: Website users who do not log in to your site can still add items to shopping carts. To identify these anonymous users, the program uses cookies. To return to their shopping carts, users who did

not log in must use the same computer as when they added transactions. If multiple users add transactions from a computer without logging in, the program adds all the transactions to a single shopping cart.

The Payment 2.0 part shopping cart can process transactions for the following parts. It cannot process transactions from other sources.

- Donation Form
- eCards
- Event Registration Form (Classic)
- Membership

After you place the Payment 2.0 part on a web page and route transactions to the shopping cart for other parts that integrate with Payment 2.0, the parts then send users to the shopping cart during transactions and the Payment 2.0 part determines the merchant account and available payment methods. After users add items to the shopping cart, they can click links to edit individual transactions. When users pay with credit cards, the program collects user information on secure payment pages to help you comply with the Payment Card Industry Data Security Standard (PCI DSS).

➤ Design Payment 2.0

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, under **General**, enter how long to maintain shopping carts for users who add transactions but do not log in to your website.

General

Days to keep anonymous carts:

Enter how long to maintain the cookies that identify shopping carts for anonymous users

Warning: If you enter "0" in the **Days to keep anonymous carts** field, the program does not maintain cookies to identify users who are not logged in. If one of these anonymous user adds items to a shopping cart and does not check out, the user cannot return to the cart later. Depending on the browser, the cart is cleared either when the browsing session times out or when the user closes the browser.

For registered users on your website, the Payment 2.0 part maintains shopping carts until they process the items in their carts. However, the program can remove individual items such as event registrations when the parts place time limits on how long the items can remain in shopping carts.

2. Under **Confirmation screen**, design the payment summary that appears after user check out in the shopping cart.

Confirmation screen
Design the confirmation screen that appears after users check out.

[Load Confirmation Template](#)

Formatting Insert View

Paste Cut Copy HTML Code

Font family Font size **B** *I* U ABC A ab

Dear **First Name**,

Thank you for your contribution of **Summary Gift Amount** to our organization. The advancements we have made can be attributed in many ways to people like you who have generously supported our mission. We are grateful for your generosity and hope that you will take great pride in the important difference that your contribution makes.

Below is a summary of your contribution:

Total: **Summary Gift Amount**

Date: **Gift Date**

Summary:

Receipt Grid

Combined Acknowledgements

On behalf of our entire organization, thank you again for your generous contribution.

In the HTML editor, enter content for the payment summary and format the appearance and layout. To include personalized information, use merge fields. To remove the changes you make to the default confirmation screen, click **Load Confirmation Template**.

For more information, see the *Program Basics Guide*.

- Under **Required Fields**, select the checkbox for each field to make required on the payment form. To ensure you download complete constituent information, we recommend that you make all these fields required.

Required fields
Specify whether the following fields are required.

☐ First name

☐ Title

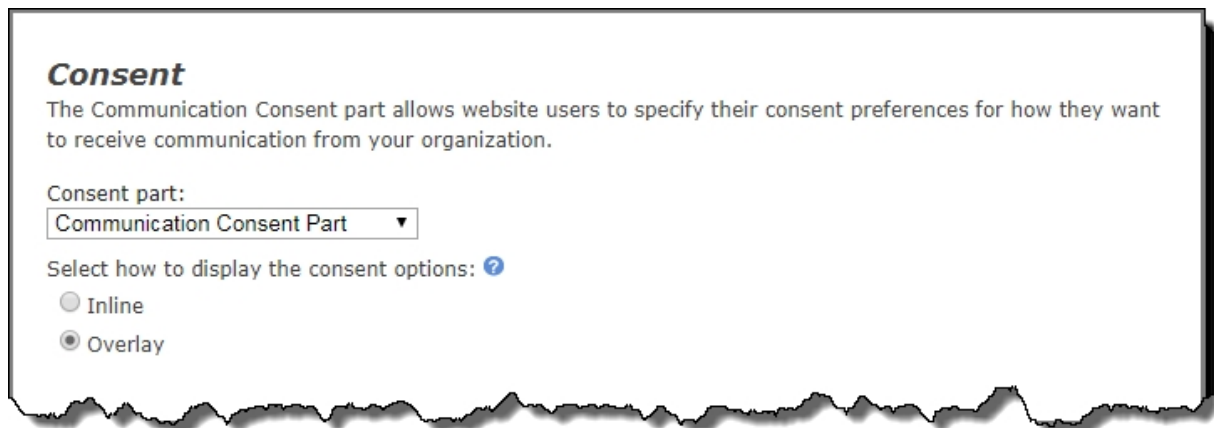
☐ Phone

- Under **Additional fields**, select the additional fields to include on the payment page.

- a. In the **Include** column, select the checkbox for each additional field you want to appear on the payment page. If you require a field, you must also include it.
- b. In the **Required** column, select the checkbox for each additional field website users must complete to submit their payments.

Tip: We recommend you include **Middle name** so your organization meets the Canadian Revenue Agency's requirements for donation receipts.

5. To enable users to specify their consent preferences for how they want to receive communication from your organization:



Consent

The Communication Consent part allows website users to specify their consent preferences for how they want to receive communication from your organization.

Consent part:
 Communication Consent Part ▼

Select how to display the consent options: ?

☐ Inline

☒ Overlay

- a. Under **Consent part**, select a saved Communication Consent part to include on the form.
- b. Select how you want the communication preference options to display — choose **Inline** to embed the options directly in the form itself or choose **Overlay** to display a pop-up window with the consent options when the form is submitted.

After users submit the form, their consent information is downloaded to the BBNC plugin along with their transaction. After the transaction is processed, their constituent record is updated in The Raiser's Edge with their communication consent preferences. If the user is logged in when they submit the form and their BBNC account is linked to a constituent record in The Raiser's Edge, their communication consent preferences are written directly to their record in The Raiser's Edge.

6. Under **Payment methods**, select the payment methods to offer to website users. You can allow users to pay with credit card and direct debit, or to make pledges to pay later.

Warning: If you select **Direct debit** only, the Payment 2.0 part cannot process event registrations because the Event Registration Form part does not accept direct debit payments. You must either select an additional payment method or direct event registration transactions to a different Payment 2.0 part.

Payment methods

Select the payment methods to offer users when they check out.

Merchant account: *

<please select> ▼

Select the Internet merchant account to process credit card transactions.

☒ Credit card

☐ Pledge (Bill me later)

☐ Direct debit

Note: To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), the Payment 2.0 part directs users who pay with credit cards to the secure payment page to process payments. It does not direct users to this page when they make pledges or pay with direct debit. For information about the secure payment page, see [Secure Payment Page on page 131](#).

- In the **Merchant account** field, select the merchant account to use to process credit card transactions. For example, you can use your organization's Blackbaud Merchant Services account. The system administrator sets up merchant accounts in *Administration*. For more information, see the *Administration Guide*.

Warning: If you create multiple Payment 2.0 parts for your website, you should use the same merchant account for each part. If you use multiple merchant accounts and users purchase items through more than one Payment 2.0 part, the program processes all items with the merchant account for the last item. If you set up merchant accounts for different currencies, this means users may pay for some items with the wrong currency.

- Under **Additional payment fields**, select whether to include *reCAPTCHA* on the form. When you select this option, a *reCAPTCHA* checkbox displays below credit card payment fields on your Blackbaud Secure Payments form. Users must select the *reCAPTCHA* checkbox before they can submit the form.

Additional payment fields

Select the additional payment fields to display on the form.

Field	Include
reCAPTCHA ?	<input type="checkbox"/>

- Click **Next**. The **Acknowledgement email** section appears.

Acknowledgement email
Design the acknowledgement email to send users after they check out.

Name of email: *

Subject: *

From address: * From name: *

Reply address:

[Hide options](#)

Notifications are to be sent to the following address

Failures: ☐

Formatting Insert View

Paste Cut Copy HTML Code

Font family Font size

B *I* U ABC **A** **ab** **1** **2** **3** **4** **5** **6** **7** **8** **9** **0** **x²** **x₂** **ABC**

Dear ,

Thank you for your contribution of to our organization. The advancements we have made can be attributed in many ways to people like you who have generously supported our mission. We are grateful for your generosity and hope that you will take great pride in the important difference that your contribution makes.

Below is a summary of your contribution:

Total:

Date:

Summary:

On behalf of our entire organization, thank you again for your generous contribution.

10. Enter a name for the acknowledgement, a subject, and an address and name to include in the **From** field of the email message.
11. To receive responses from recipients at a different email address than the one you use to send the message, enter the return address in the **Reply Address** field.
12. Under **Notifications are to be sent to the following addresses**, select **Failures** to receive failure messages for email messages that are not delivered. In the field beside the checkbox, enter an email address to receive failure messages.

Note: Failures are email addresses that do not receive the acknowledgement email. Failures can also be called non-delivery receipts, bouncebacks, UnDeliverables, or Delivery Status Notifications (DSN).

13. In the HTML editor, enter content for the acknowledgement email message and format the appearance and layout. To include personalized information, use merge fields.
For more information, see the *Program Basics Guide*.

Note: You design acknowledgement messages for each part that routes transactions to a shopping cart. To include all these acknowledgements messages in the email message you design for the Payment 2.0 part, use the **Acknowledgement Block** merge field. For example, you can add the merge field to a Payment 2.0 part acknowledgement email message and then route transactions to the part from Donation Form and Membership Form parts. After website users check out, they receive a single Payment 2.0 acknowledgement email that includes acknowledgment messages from the Donation Form, and Membership Form parts. You can also use this merge field on the Payment 2.0 part's confirmation screen.

14. Click **Save**. You return to *Parts*.

Secure Payment Page

To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), the program uses a secure payment page to process biographical billing information and payment information for the Event Registration and Payment 2.0 parts. Users enter the information on a secure payment web page that is hosted on a separate Blackbaud server from your website.

Note: Whether you host your site or Blackbaud hosts your site, the secure payment page on the hosted Blackbaud server processes credit card payments only.

When a user submits a credit card payment on the Payment 2.0 part, the user navigates through a series of pages. First, a user enters the amount and biographical information on your site. When the page is complete, the user clicks **Check out**.

The program uses the style sheet, layout, template, and page for desktop browsers and mobile devices to display the secure payment page on the Blackbaud server. On this page, the user enters billing and payment information, such as credit card details.

Note: Your organization can use the Template 1.0 static page or Template 2.0 responsive page for your secure payment page. However, if you are using the static page, we recommend you upgrade to the responsive page to provide an optimal experience for website users on various devices. For information about upgrading an individual static secure payment page to a responsive one, refer to the *Website Design Guide*.

To complete the transaction, the user clicks **Pay now**. The secure payment page uses Blackbaud *Payment Service* to transmit the users's information and process the credit card transaction. For more information about Blackbaud *Payment Service*, see the *Payment Application Data Security Standards Implementation Guide*.

Warning: Your code tables in The Raiser's Edge for countries and their subdivisions, such as States and provinces, must follow the International Organization for Standardization's ISO 3166 standards. The secure payment page uses ISO 3166-1 for countries and ISO 3166-2 for subdivisions such as states. If your code tables do not match these standards, Blackbaud *Secure Payment* changes selections to the closest abbreviation when it processes transactions, and this can lead to incorrect address information. For example, if your countries table includes "United Kingdom," The secure payment page changes this to the United States abbreviation "US" because it is the closest abbreviation to "Un." In ISO 3166-1, the abbreviation for the United Kingdom is "GB," and your code table must match this. For information about how to edit your code tables in The Raiser's Edge for countries and their subdivisions, see the *Configuration and Security Guide*.

The user returns to your site and your confirmation page appears.

Secure Payment Page: Important Considerations

There are several important items to remember about the secure payment page for the Payment 2.0 part. The secure payment page uses your style sheets, layouts, templates, and pages for desktop browsers and mobile devices to render the page. Make sure you consider this information to enhance accessibility for both options.

- When you use the same Payment 2.0 part on two web pages that use two different templates, the secure payment page renders using the template for the page the website user navigates from. For example, your payment page for an event registration uses a template with a red background and your payment page for a donation uses a template with a blue background. When a user navigates from the event registration payment page to the secure payment page, the page renders using the red template. When a user navigates from the donation payment page to the secure payment page, the page renders using the blue template.
- Some parts, such as Formatted Texts & Image and Menu, appear on the secure payment page. Images also appear. However, you may notice that some parts, including Unformatted Text, do not appear on the page.
- When you include targeted content on your page, be aware that it does not apply to the secure payment page. No matter the role the user is in, the secure payment page renders the view for an anonymous user the same way your page appears for anonymous users. Anonymous users are users not logged in to your website.
- We recommend you remove parts that contain a Flash file. These files include JavaScript that the secure payment page removes for PCI DSS compliance. If you do not remove the part, an Adobe download message likely appears in its place on the secure payment page.
- Likewise, we recommend you remove graphics that include JavaScript. The secure payment page removes these graphics for PCI DSS compliance. If you do not remove the graphic, the page likely renders incorrectly.
- We recommend you remove third-party social media sharing widgets from your page. These links typically include JavaScript that the secure payment page removes for PCI DSS compliance.
- External style sheets including those you import in *Stylesheets* do not appear. Only styles from the default style sheet or inline on a part appear.
- To enhance performance between your site and Blackbaud's server, the program holds design and property updates you make to the style sheet, layout, template, and page for your payment page in a queue. When this content remains static for five minutes, the updates push to the Blackbaud server within one hour. You cannot change this process. However, you can click **Update templates** in *Sites & settings* to manually update the changes for your secure payment page. For more information, refer to the *Administration Guide*.
- A generic template exists for the secure payment page. It is unlikely you want to use it because it does not match the rest of your website. However, Flash and JavaScript content does not upload to the secure payment page for PCI DSS compliance. If your page, template, or layout includes this content and the absence of it heavily impacts the appearance of your secure payment page, you may want to use the generic template. You can also use the generic template if you need to temporarily revert your template updates to the page. When you are ready to use your template

again, you select **Enable secure payment template updates** and click **Update templates** in *Sites & settings*. For more information, refer to the *Administration Guide*.

Note: The program does not send updates to the Blackbaud secure payment server for Payment 2.0 and Event Registration pages that do not accept credit cards.

Secure Payment Page: Transaction Processing Safeguards

When users navigate from an Event Registration Form or Payment 2.0 web page to the secure payment page and an interruption unexpectedly occurs before the transaction is submitted, your payment processor receives the payment and the information from the Payment 2.0 web page creates a transaction to process in The Raiser's Edge.

Note: An interruption can occur when your website server refreshes while a user attempts to submit a transaction. An interruption can also occur when a user leaves your secure payment page for a time that exceeds the session login and then returns to the page and submits the transaction.

To support this feature, database processes check the secure payment page for unprocessed data every 24 hours.

- For Payment 2.0, the payment page can still include information after The Raiser's Edge transmits data to the database if users complete payment fields on the secure payment page but do not submit their transactions. Your system administrator can access the page to provide you with a list of these users so you can follow up with them.

The remaining data is stored for 30 days unless your system administrator changes the `UnprocessedBBSPTTransactionLifeSpanInDays` web.config setting to increase or decrease the number of days. For example, to increase the number of days to 60, enter `<UnprocessedBBSPTTransactionLifeSpanInDays = 60>` in the `<appSettings>` node of web.config.

Your system administrator can also use the `ArchiveUnprocessedBBSPTTransactions` web.config setting to specify whether the process should move the remaining data from the table to the `CMS_UnprocessedBBSPTTransaction` archive table in the database, or delete it permanently. For example, to move Payment 2.0 data to the archive table, enter `ArchiveUnprocessedBBSPTTransactions=True` in the `<appSetting>` node of web.config. Otherwise, enter `False`.

- For the Event Registration Form, the process checks for unprocessed data between 12-01-2014 and the current date. Your system administrator can change the `Event2_MaxGiftDate` web.config setting to specify a different beginning date. The value for the date must be in UTC format. For example, to change the date to 12-15-2014, enter `< add key="Event2_MaxGiftDate" value="2014-12-15" />`.

Payment Summary 2.0

Payment Summary 2.0 part works with Payment 2.0 parts to provide website users a summary view of their payments. The payment summary can display the number of items on a payment page and the total cost for the items. It can also provide a link to view the payment page and pay for transactions. You can also include a summary grid that lists the items added to the cart and provides a brief description of each. When you add a link and place the summary on a page template, a website user

can access the payment page from any web page that uses that template. You can also use merge fields to create two versions of the summary: one for an empty payment page and one for a page with transactions.

When you create a payment summary, you select a Payment 2.0 part to connect to the summary. For information about the Payment 2.0 part, see [Payment 2.0 on page 125](#).

➤ Design Payment Summary 2.0

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, in the **Payment 2.0 part** field, select the Payment 2.0 part to connect to the summary.

General options

Payment 2.0 part: *
 Payment 2.0 ▼ Select a Payment 2.0 part on which to base this summary.

☒ Include shopping cart summary grid To include a summary grid that lists the items in the shopping cart, select this option. The grid appears below the payment summary content.

Payment summary content

Design the payment summary. You can use merge fields to display important data such as the number of transactions and the total cost.

Formatting Insert View

Paste Cut Copy HTML Code Font family Font size B I U ABC A ab X² X₂ ABC

Number of items in cart: Cart Summary Fields.Item count

Total: Cart Summary Fields.Total cost Cart Summary Fields.Begin content for no pending transactions

No Pending Transactions Cart Summary Fields.End content for no pending transactions

Cart Summary Fields.Begin content for pending transactions

Pending: Cart Summary Fields.End content for pending transactions

[Pay now](#)

2. To include a summary grid that lists the items in the shopping cart, select **Include shopping cart summary grid**. The grid appears below the payment summary content.
3. Under **Payment summary content**, enter the text to appear in the payment summary. You can use merge fields to display the number of transactions on a website user's payment page and the total cost, as well as to provide a link to the page. You also can use merge fields to create

conditional statements that appear according to whether the payment page contains transactions. To format the content's appearance and layout, use the HTML editor.

For more information about the HTML editor, see the *Program Basics Guide*.

4. Click **Save**. You return to *Parts*.

Profile Display

Use the Profile Display part to display a read-only profile page for website users to view profile details about an individual or organization. You select the fields to include in the profile display. For example, for an individual, you can display biographical, address, and contact information about the user. You can also create separate Profile Display parts for individual constituents, organization constituents, and user networking groups.

Note: The Profile Display part displays profile information the user enters on a Profile Form part. For information about how to create an editable profile form, see [Profile Form on page 137](#).

You can use the Profile Display part to display information for only the logged-in user or to link to a directory so it displays information for any person or organization selected in the directory. For more information about directories, see [Directory on page 28](#).

Warning: You cannot use HTML to embed your own form via HTML in a Profile Display part.

➤ Design Profile Display

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, in the **Source** field, select the profile type to appear when the website user clicks the link.

Source: *
Current user

Select the profile type to appear for a website user. "Current user" displays the profile for the logged-in user. "Directory" displays on a page that links from a directory.

Max height/width for full-size image:
px

When you select to include the **Profile image** merge field in the HTML editor, enter the maximum display height and width for profile images when users click thumbnails on the web page.

Max height/width for thumbnails:
px

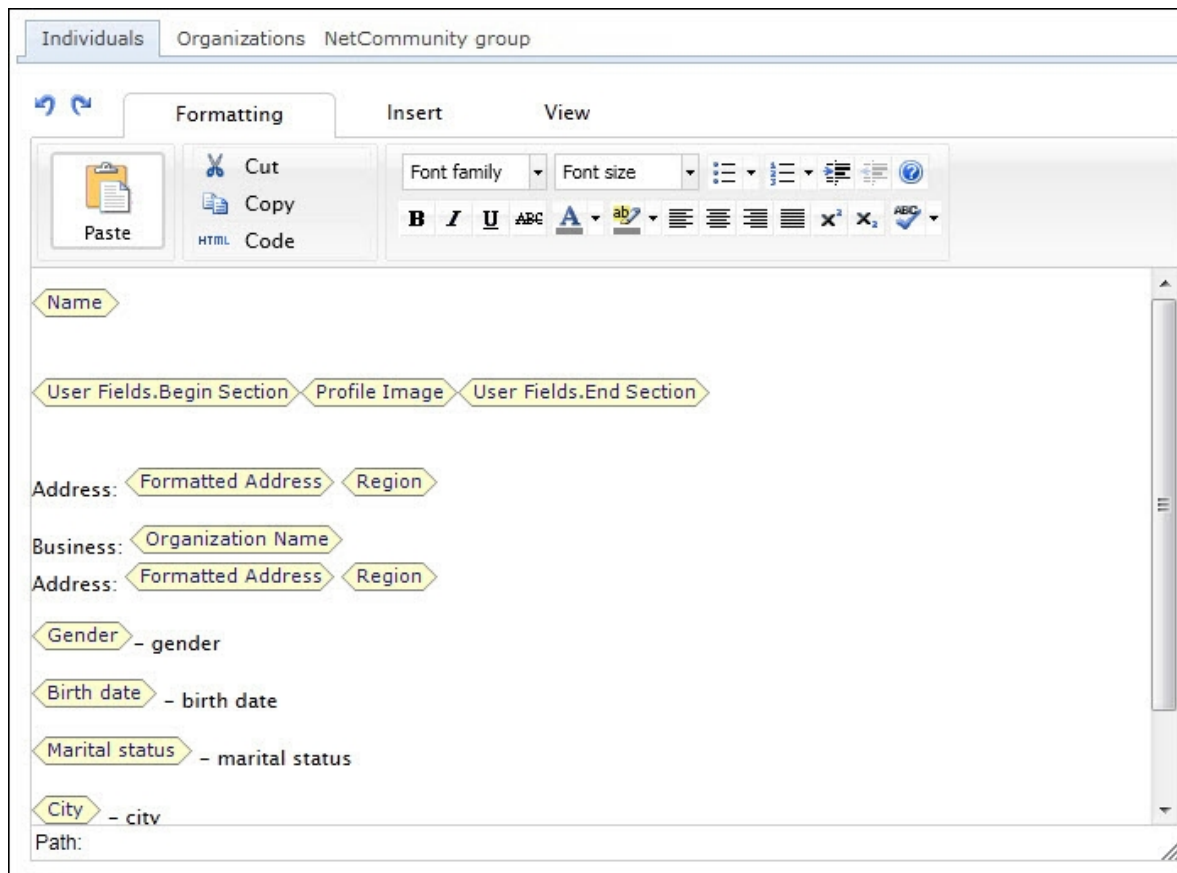
When you select to include the **Profile image** merge field in the HTML editor, enter the maximum thumbnail height and width for profile images on the web page.

- "Current User" — Select this to display the profile for the logged-in user.
 - "Directory" — Select this if this profile part is added to a page linked to a directory. When a profile is linked to a directory, users can click a field in the directory to display the profile for the selected person. For more information about directories, see [Directory on page 28](#).
2. In the **Max height/width for full-size image** field, enter the maximum display height and width for full-size profile images that display when users click thumbnails on the web page.

3. In the **Max height/width for thumbnails** field, enter the maximum height and width for profile image thumbnails on the web page.

Tip: When you leave the **Max height/width for full-size image** and the **Max height/width for thumbnails** fields blank, the default size to display full-size and thumbnail profile images on a web page is 200 px. To include profile images on the page, make sure you include the **Profile image** merge field in the HTML editor design box.

4. On the HTML editor, select whether to create profile display content for an individual or organization constituent or for a user networking group.



- To design content to appear for an individual constituent, select the Individuals tab.
 - To design content to appear for an organization constituent, select the Organizations tab.
 - To design content to appear for a group on your user networking site, select the Blackbaud NetCommunity Spark group tab.
5. To enter and format the profile content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.
 - When you design content to appear for an individual or organization constituent, you can add merge fields for personalized information to appear.

- When you design content to appear for a user networking group, you can add merge fields for personalized information from the User Networking Manager part to appear.

Note: On your website, email address merge fields on a Profile Display part appear as links users can click to send an email message to the address.

6. Click **Save**. You return to *Parts*.

Profile Form

With the Profile Form part, you can create profile forms for constituents and organizations to update their biographical, address, and contact information. For example, Jane Compton is a member of the Class of 1988. When she visits your website, she navigates to the user profile page and enters the information you selected to appear on the individual Profile Form part, such as her full name, current address, and spouse information. You can download the information she enters on your website to The Raiser's Edge.

You select the fields of information to appear in each section of the form. The user can select whether profile information is public (all users can view it) or private (only the user can view it). We recommend you use the profile form on password-protected pages only.

Note: When users update their profiles, the changes appear in profile displays or directory listings automatically, even before the changes are downloaded.

If a user is a relationship type with appropriate rights, he or she can edit profile information for an organization. For example, you can specify that only constituents with a relationship type of "Administrator" or "Primary Contact" can edit their organization's profile.

Note: To edit an organization's profile, in addition to the relationship type set on the Settings tab in *Sites & settings*, the website user must be established as a contact for the organization in The Raiser's Edge.

➤ Design Profile Form

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, under **Select the type of constituents to use the Profile Form**, select either **Individual** or **Organization**.

Select the type of constituents to use for the Profile Form.

☒ Individual ☐ Organization

Profile form options

After update navigate to: *

Profile fields

Section to edit:

Bio

Heading of section:

Fields to include:

Include	Field	Edit	Required	Privacy edit	Use code table	Alternate caption
<input type="checkbox"/>	Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Title 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	First	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

2. Under **Profile form options**, in the **After update navigate to** field, browse to the web page to appear after website users submit their profile information.
If you do not select a page, the profile form appears after users submit profile information.
3. If you select **Organization**, the **Message to display when there are no organization records** box appears. In the box, enter the message to appear when website users who navigate to a page with the profile form part do not have an organization record or are not a relationship type with **Edit Org Profile** marked on the Settings tab in *Sites & settings*. For example, enter "There are no organizations associated with your record." For more information, see the *Administration Guide*.
4. Add each section to the profile form as required.
 - a. In the **Section** field, select the type of section to add to the form. Fields appear in the grid for the section type you selected.
The system administrator selects the attributes available on the Settings tab on the Settings tab in *Sites & settings*. For more information, see the *Administration Guide*.
 - b. In the **Heading** field, enter the text to appear at the top of the section. For example, for the Bio section of an individual profile, enter "Personal Information."

To specify the order of sections, add a number to the beginning of each section heading. For example, if you select “Preferred Address” in the **Section** field and enter “2. Preferred Address” in the **Heading** field, the Preferred Address section appears second in the profile.

- c. In the **Fields** grid, select the fields to include in the section and options for the fields.

Note: To protect user passwords, users cannot change their user IDs, passwords, or email addresses on profile forms unless they confirm their passwords first. When users attempt to change the **Preferred Email** field in the Phones and Email section or the **User ID** and **Password** fields in the User Login section, a field requests their current password. Users must enter their passwords so that other users cannot change their credentials or receive email messages with their unencrypted passwords.

Option	Function
Include	Select the checkbox next to each field to include in the profile display grid.
Field	This column displays the fields from The Raiser's Edge you can include in the section.
Edit	To allow the user to edit a field, select this checkbox. If you do not select this checkbox, the field appears in the profile but the user cannot change its value.
Required	To make a field required, select this checkbox. If you select this checkbox, the user must select or enter a value for the field to complete the form.
Privacy edit	<p>To allow users to hide the content of a field, select this checkbox. For example, to allow users to hide their birth dates on the profile display, select this checkbox for the Birth date field. On the profile display, “{private}” appears when users hide the field. For organizations, this column is disabled.</p> <p>Note: By default, the Profile Form part uses privacy settings from <i>Field Options</i> to determine whether to display content on the form display. After you process users and they visit the profile display, the program locks in these default privacy settings, and future changes in <i>Field Options</i> do not affect privacy settings for the users. However, users can still change the settings for the fields where you select Privacy edit.</p>
Use code table	If a field has code table values, this checkbox appears. If you select this checkbox, the field on the form displays the code table values from The Raiser's Edge. If you do not select this checkbox, the user must enter a value in the field.
Edit codes	If a field has code table values, this checkbox appears. To enable the user to enter a value other than a code table value, select this checkbox. On the form, an Other field appears next to the field so users can enter a value other than those provided.
Alternate caption	To edit a field name, enter a new name in this column. For example, you can call the Birth date field the Birth date (mm/dd/yyyy) field.

5. To enable users to specify their consent preferences for how they want to receive communication from your organization:

Consent

The Communication Consent part allows website users to specify their consent preferences for how they want to receive communication from your organization.

Consent part:
 Communication Consent Part ▼

Select how to display the consent options: ?

☐ Inline

☒ Overlay

- a. Under **Consent**, in **Consent part**, select a saved Communication Consent part to include on the form.
- b. Select how you want the communication preference options to display — choose **Inline** to embed the options directly in the form itself or choose **Overlay** to display a pop-up window with the consent options when the form is submitted.

When the Communication Consent part is included on the Profile form, note the following: Consent options do not display for organizations, the profile update transaction does not include any Request No Email attribute information, and the **Request No Email** checkbox is not displayed on the form, whether or not the Request No Email attribute is included on the form via the **Bio** fields.

If the Communication Consent part is not included on the Profile form, then the **Request No Email** checkbox will display on the Profile form provided that the Request No Email attribute is included on the Profile form via the **Bio** fields.

After users submit the form, their consent information is downloaded to the BBNC plugin along with their transaction. After the transaction is processed, their constituent record is updated in The Raiser's Edge with their communication consent preferences. If the user is logged in when they submit the form and their BBNC account is linked to a constituent record in The Raiser's Edge, their communication consent preferences are written directly to their record in The Raiser's Edge.

6. Click **Save**. You return to *Parts*.

Targeted Content

With a Targeted Content part, you can target information or features on a web page to different users based on roles or the individual user. For example, you may want Major Donors to see a donation form designed specifically for them, but you want all other users see the standard donation form. Use a Targeted Content part to attach both donation forms on the same web page. When a major donor accesses the page, the first donation form appears. When other users access the page, the second donation form appears.

➤ Design Targeted Content

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, create a part or add an existing part.

When a user visits a page with targeted content, the first part that has targeted Roles that match the user's group membership will be displayed. If the user's membership does not match any of the Roles in the parts below, nothing will be displayed.

Drag and drop the parts to reorder them. Parts with a ~~strickethrough~~ part name will never be displayed.

Part Name	Targeted Roles
Community Health - Members	Major Givers; Members;
Community Health - Nonmembers	Everyone;

Add New Part Add Existing Part

- To create a part to appear on the web page for a targeted audience, click **Add New Part**. The New Part screen appears.
- To select an existing part for a targeted audience, click **Add Existing Part**. The Select a Part screen appears.
 - a. Select the part for the targeted audience, such as "Major Donor Donation Form."
 - b. Click **Select**. You return to the Design tab. The **Targeted Roles and Users** column displays the roles and users associated with the selected part. This determines who sees the targeted content on the web page with the Targeted Content part.

To display a complete list of roles and users associated with a part, hover over the row in the **Targeted Roles and Users** column.

Note: The first part in the list appears first on the web page for the roles and users associated with the part. For example, the Major Donor Donation Form you selected has view rights for the Major Givers role. When users in this role log into the website and access the donation page, they see a form designed specifically for them that other user roles do not see.

2. Create additional parts or include existing parts as necessary for the targeted content. You can include as many parts as you want. For example, you can include the "Healthcare Donation Form" for users in the healthcare profession and the "Simple Donation Form" for the rest of your donors.

Note: When a user accesses a page with a Targeted Content part, the first part in the list that includes that user or the user's role appears. For example, Mark Adamson is a member of the Board Members role. When he accesses the donation page, he does not view the Major Donor Donation Form or Healthcare Donation Form parts because those parts are not associated with the Board Members role. Mark views the Simple Donation Form part because he is a user in the Board Members role. If the users or user's role is not included in any parts on the Targeted Content part, nothing appears in that area on the web page.

3. On the Design tab, the first column displays three action buttons.
 - a. To move a part in the list, click and drag the dotted button on the far left.



Tip: If you move a part, remember that users with multiple roles see the first part in the list that is associated with one of their roles. For example, Renee Wilson is a major donor, cardiologist, and board member. When she accesses the donation page, she views the Major Donor Donation Form because that part is listed before the other parts on the Design tab.

- b. To edit a part, click **Click here to edit this part**. For example, to add a role to view the targeted content, click this button to access the Targeting & Security tab for the part.

For information about users and roles, see the *Users & Security Guide*.

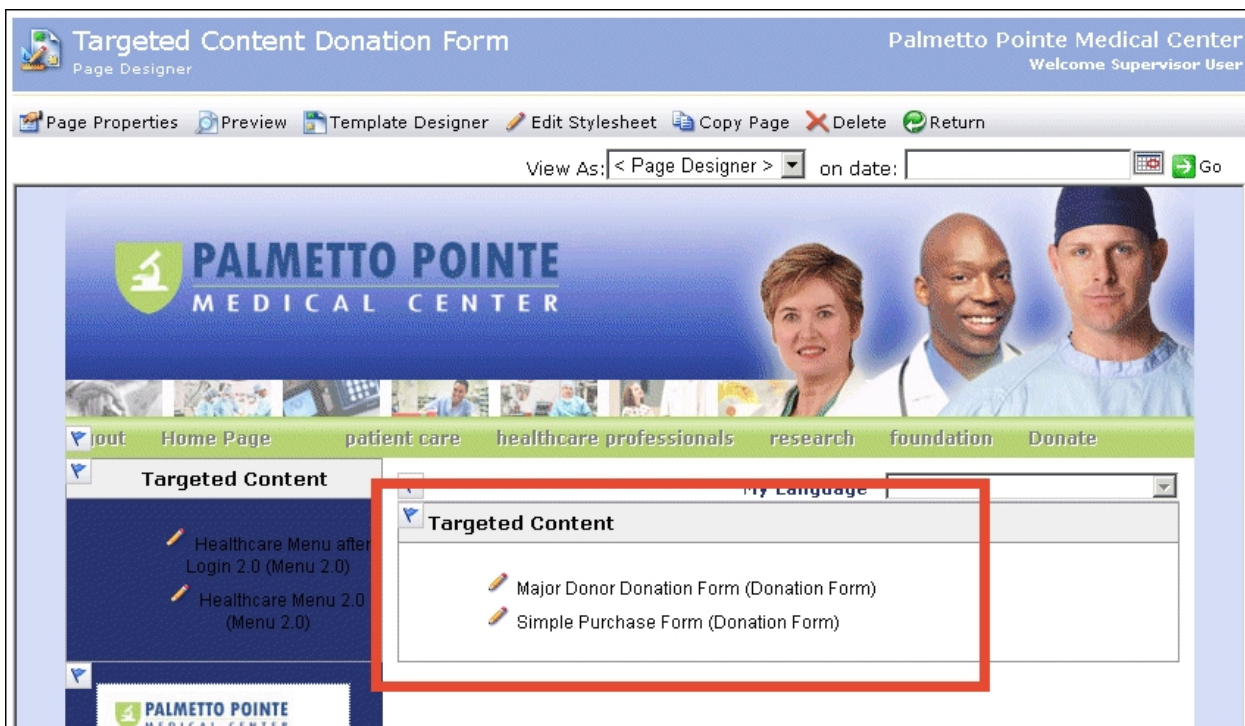
- c. To remove a part from the Targeted Content part, click **Click here to remove this part**.

Tip: If a part in the list appears in red with a strikethrough, it never appears on a web page because all roles and users are included in previous parts in the list. This occurs if you include the Everyone role, which includes all users, in a part that is not last in the list for the targeted content.

4. Click **Save**. You return to *Parts*.

Targeted Content On a Web Page

In *Pages & templates*, when you include a Targeted Content part on a web page, the part appears with **Page part** and **Edit part** buttons.



To edit the Targeted Content part, click **Page part**. This button appears as a blue flag icon. To edit a part included in the Targeted Content part, click the **Edit part** button. This button appears as a pencil icon. For more information about *Pages & templates*, see the *Website Design Guide*.

When a user accesses a page with a Targeted Content part, the first part in the list that includes that user's role appears. Using the examples in [Targeted Content on page 140](#), the following donation page appears for users in the Major Givers and Site Administrator roles.

The screenshot shows the Palmetto Pointe Medical Center website. The header features the logo and a banner with three medical professionals. The navigation bar includes links for Home Page, patient care, healthcare professionals, research, foundation, and Donate. A left sidebar lists user options like My Profile, Events Calendar, and Volunteer. The main content area is titled 'Major Donor Donation Form' and includes a language dropdown set to 'English (United States)'. The form sections are: 'Major Donor Donation Form' with an 'Amount' field marked with a red asterisk; 'Additional Information' with 'Frequency' set to 'One time' and checkboxes for 'Corporate' and 'Anonymous' donations; and 'Billing Information' with fields for 'Title', 'First name' (Supervisor), 'Last name' (User), 'Country' (United States), and 'Address Lines' (marked with a red asterisk). A small promotional graphic for the 29th Annual Bridge Run for Cancer Prevention is in the bottom left.

PALMETTO POINTE MEDICAL CENTER

logout Home Page patient care healthcare professionals research foundation Donate

My Profile
Events Calendar
Staff Intranet
Health Headlines
Bridge Run Dashboard
Shopping
Staff Directory
Volunteer
Ways I can Help
Take Action
Current Alerts

My Language English (United States)

Major Donor Donation Form

Amount: \$ *

Additional Information

Frequency: One time

Corporate: ☐ This donation is on behalf of a company

Anonymous: ☐ I prefer to make this donation anonymously

Billing Information

Title:

First name: Supervisor

Last name: User *

Country: United States

Address Lines: *

PALMETTO POINTE MEDICAL CENTER
29th Annual Bridge Run for Cancer Prevention

For users in the Cardiologists and Medical Staff roles, the following donation page appears.

The screenshot displays the Palmetto Pointe Medical Center website. The header features the center's logo and a banner with three medical professionals. A green navigation bar includes links for 'logout', 'Home Page', 'patient care', 'healthcare professionals', 'research', 'foundation', and 'Donate'. A left sidebar lists various user options like 'My Profile', 'Events Calendar', and 'Volunteer'. The main content area is titled 'Healthcare Donation Form' and includes a language selector set to 'English (United States)'. The form contains sections for selecting a donation amount (Bronze, Silver, Gold, Platinum, or Other), designating the donation (Area of Greatest Need), and providing additional information such as frequency (One time), corporate status, and anonymity.

PALMETTO POINTE
MEDICAL CENTER

logout Home Page patient care healthcare professionals research foundation Donate

My Profile
Events Calendar
Staff Intranet
Health Headlines
Bridge Run Dashboard
Shopping
Staff Directory
Volunteer
Ways I can Help
Take Action
Current Alerts

My Language English (United States)

Healthcare Donation Form

Amount:

☐ Bronze Donor \$50.00

☐ Silver Donor \$100.00

☐ Gold Donor \$500.00

☐ Platinum Donor \$1,000.00

☐ Other \$

Designation: Area of Greatest Need

Additional Information

Frequency: One time

Corporate: ☐ This donation is on behalf of a company

Anonymous: ☐ I prefer to make this donation anonymously

PALMETTO POINTE
MEDICAL CENTER
29th Annual Bridge Run
for Cancer Prevention

For users in roles such as Board Members and Everyone, the following donation page appears.



The screenshot shows the Palmetto Pointe Medical Center website. The header features the logo and a banner with three medical professionals. A navigation bar includes links for logout, Home Page, patient care, healthcare professionals, research, foundation, and Donate. A left sidebar lists various user options like My Profile, Events Calendar, and Staff Intranet. The main content area displays a 'Simple Donation Form' with fields for Amount, Frequency, and Billing Information (Title, First name, Last name, Country, Address Lines, City, State). A 'My Language' dropdown is set to 'English (United States)'. A small promotional graphic for the 29th Annual Bridge Run for Cancer Prevention is also visible.

PALMETTO POINTE MEDICAL CENTER

logout Home Page patient care healthcare professionals research foundation Donate

My Profile
Events Calendar
Staff Intranet
Health Headlines
Bridge Run Dashboard
Shopping
Staff Directory
Volunteer
Ways I can Help
Take Action
Current Alerts

My Language English (United States)

Simple Donation Form

Amount: \$ *

Additional Information

Frequency: One time

Billing Information

Title:

First name: Supervisor

Last name: User

Country: United States

Address Lines: *

City:

State: <Please Select> *

PALMETTO POINTE MEDICAL CENTER
29th Annual Bridge Run for Cancer Prevention

Transaction Manager

With the Transaction Manager part, you can create and display a giving history for donors. When a website user logs in to your website, the Transaction Manager part uses the user's login information to filter his donor information and display it as a customized giving history. With this part, users can view their offline and online gifts, as well as any pending online transactions that have not been processed.

On the website, the Transaction Manager part can display one of two tabs, or both. The Active tab displays current pledges.

Active

History

Date Range: All dates

Designations: All designations

Group By:

Apply

Date	Gift Type	Amount	Pay Method	Balance	Installment Frequency	Installment Schedule
11/20/2006	Pledge	\$1,000.00	Cash	\$1,000.00	Single Installment	Installments due on 11/20/2006
		(Pay)				
		Balance Remaining:	\$1,000.00			

Page 1 of 1

Currency	Gift Total	Pledge Total	Remaining Pledge Total
USD	\$0.00	\$1,000.00	\$1,000.00

The History tab displays all gifts the user made to the organization for the selected time period or fund. Users can also select how transactions are grouped in the grid. For example, they can group by date or payment method.

Active

History

Date Range:

All dates

▼

Apply

Date	▼ Gift Type	Amount	Pay Method	Balance	Installment Frequency	Installment Schedule
11/14/2008	Cash	\$5,000.00	Credit Card		Single Installment	
4/8/2007	Cash	\$500.00	Credit Card		Single Installment	
⊕ 11/20/2006	Pledge	\$1,000.00 (Pay)	Cash	\$1,000.00	Single Installment	Installments due on 11/20/2006
10/29/2006	Cash	\$200.00	Personal Check		Single Installment	
6/15/2006	Cash	\$25.00	Cash		Single Installment	
2/1/2006	Cash	\$10,000.00	Credit Card		Single Installment	

Page 1 of 1

Gift Total	Pledge Total	Pending Total	Remaining Pledge Total
\$23,427.50	\$1,000.00	\$0.00	\$1,000.00

On the Transaction Manager part's Edit Part screen, you select the tabs to display and the gifts to include in the giving history. You can include all gifts, filter gifts by gift type or purpose, or use an offline gift query to filter gifts. The giving history includes a donor's original gift, but it does not include any matching gift from the donor's employer. In addition to your filtering criteria, you can select whether to include recognition credits, also called soft credits, and pending online transactions in the giving history. When you include pending gifts, the gifts appear regardless of any filtering criteria you apply.

You can also choose whether to allow website users to make payments from the giving history toward outstanding pledges. This option is available for donors who select the Pledge (Bill Me Later) payment method or donors for whom you enter a pledge offline. If you allow pledge payments and the pledge will be paid in installments, a **Pay** link appears in the **Amount** column with the pledge entry on the Active and History tabs. The user clicks this link to view a donation form for the pledge and make a payment online. The **Pay** link also appears for unpaid event registration fees.

Tip: The **Pay** link does not appear if a pledge installment is pending, if the total pledge balance is zero, or if the donor submitted credit card or direct debit payment information at the time the pledge was created.

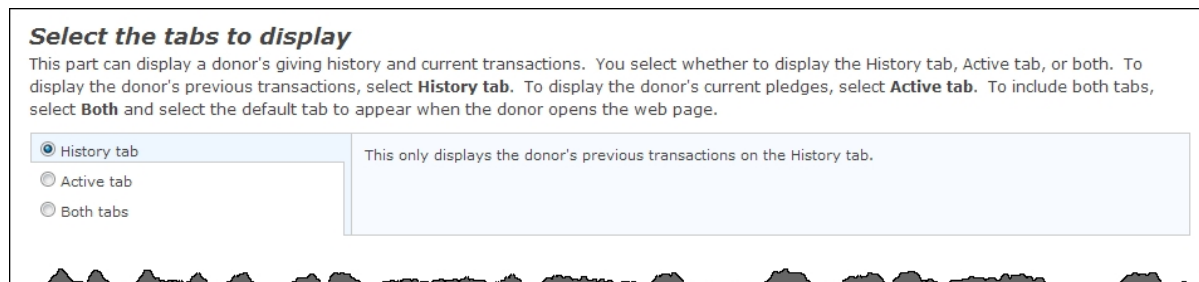
Note: Pledges and pledge payments appear as separate entries on the History tab. From a pledge entry, you can view the remaining balance and the most recent payment. From a pledge payment entry, you can view the date, amount, and balance of the pledge. However, pledge payments include pledge information only when the pledge appears in the giving history. If you filter gifts and exclude a pledge, payments do not include information about the pledge. For example, you can use a gift query to exclude gifts before a certain date. If a pledge is made before that date, the giving history shows subsequent pledge payments but not the pledge details.

To customize the appearance and content of the giving history, you can select the columns to display for the donor, edit column headings, and add or remove columns. You can also add a gift summary section.

➤ Design Transaction Manager

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. Under **Select the tabs to display** on the Design tab, select whether to display the History tab, Active tab, or both.



Select the tabs to display

This part can display a donor's giving history and current transactions. You select whether to display the History tab, Active tab, or both. To display the donor's previous transactions, select **History tab**. To display the donor's current pledges, select **Active tab**. To include both tabs, select **Both** and select the default tab to appear when the donor opens the web page.

☒ History tab
☐ Active tab
☐ Both tabs

This only displays the donor's previous transactions on the History tab.

- To display the donor's previous transactions, select **History tab**.
 - To display the donor's current pledges, select the **Active tab**.
 - To display the donor's giving history and current transactions, select **Both tabs**. In the field that appears on the right, select the default tab to display when the donor opens the web page.
2. Under **Configure results**, in the **Results per page** field select how many gifts to include on each page of the giving history.



Configure results

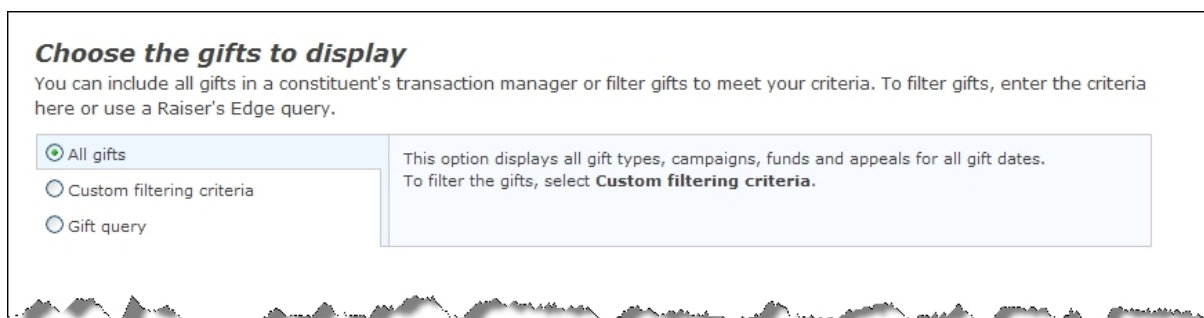
Select the maximum number of gift records to appear in the transaction manager. You can display up to 100 records per page.

Results per page:

25

3. Under **Choose the gifts to display**, select the gifts to include in the giving history.

- To include all gifts, select **All gifts**.



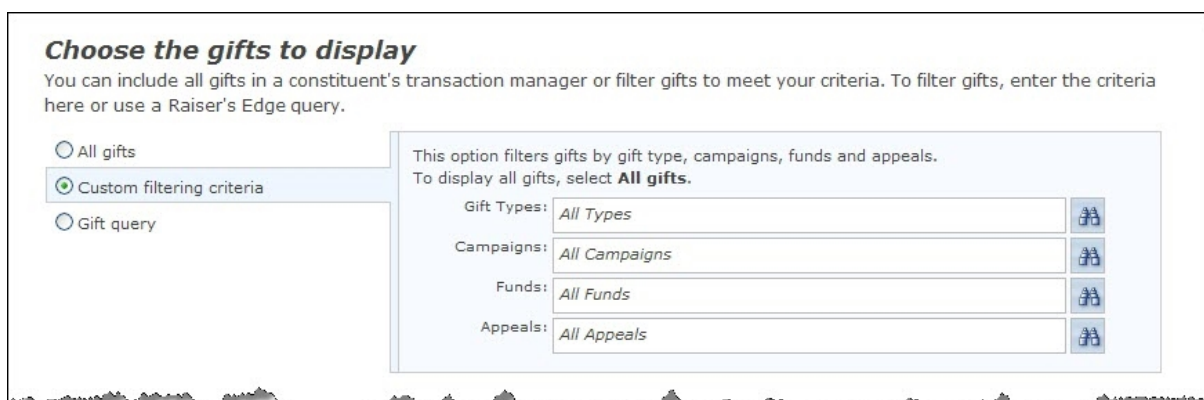
Choose the gifts to display

You can include all gifts in a constituent's transaction manager or filter gifts to meet your criteria. To filter gifts, enter the criteria here or use a Raiser's Edge query.

☒ All gifts
☐ Custom filtering criteria
☐ Gift query

This option displays all gift types, campaigns, funds and appeals for all gift dates. To filter the gifts, select **Custom filtering criteria**.

- To filter the gifts on the Transaction Manager part, select **Custom filtering criteria**.







Choose the gifts to display

You can include all gifts in a constituent's transaction manager or filter gifts to meet your criteria. To filter gifts, enter the criteria here or use a Raiser's Edge query.

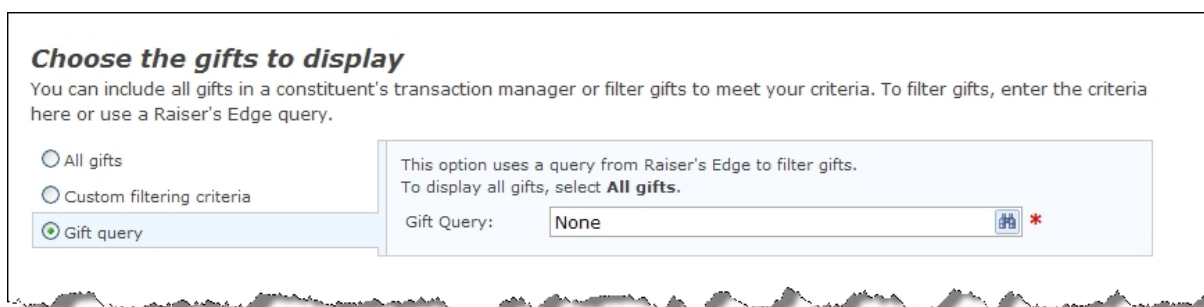
☐ All gifts
☒ Custom filtering criteria
☐ Gift query

This option filters gifts by gift type, campaigns, funds and appeals. To display all gifts, select **All gifts**.

Gift Types: 
 Campaigns: 
 Funds: 
 Appeals: 

To select the gift types, campaigns, funds, or appeals to include in the giving history, click the binoculars. On the screen that appears, select your filter criteria.

- To use a gift query from The Raiser's Edge to filter gifts, select **Gift query**.




Choose the gifts to display

You can include all gifts in a constituent's transaction manager or filter gifts to meet your criteria. To filter gifts, enter the criteria here or use a Raiser's Edge query.

☐ All gifts
☐ Custom filtering criteria
☒ Gift query

This option uses a query from Raiser's Edge to filter gifts. To display all gifts, select **All gifts**.

Gift Query:  *

To select a query, click the binoculars. On the search screen that appears, select a query. For information about the search screen, see the *Program Basics Guide*.

- To include soft credits, select **Include soft credits**.

☒ Include soft credits

If you include soft credits, the total gift amount may exceed the amount given by the user because soft credits acknowledge multiple donors for a single gift. For information about soft credits, [click here](#).

☐ Include pending online transactions

If you include pending transactions, the transaction manager displays gifts you receive on your website that have not yet been processed. These online transactions appear regardless of any filters you apply to the transaction manager data.

- To include pending transactions from your website, select **Include pending online transactions**.

Note: For pending online transactions, only the gift amount, payment method, and gift date appear in the giving history. Other details do not appear until you process gifts.

- To include unpaid event registration fees, select **Include unpaid event registrations**. When you select this option, the **Configure event fee payment** field appears.
4. Under **Choose the columns to display**, select the columns to include in the giving history.
- To display the default **Date**, **Gift Type**, **Fund Description**, and **Amount** columns, select **Default**.

Choose the columns to display

You can customize the appearance and content of the transaction manager. You can add and remove columns, and you can rearrange the order. To rename the column headings, use the Language tab.

☒ Default

☐ Custom

This option displays the default transaction manager configuration. To customize the columns, select **Custom**.

Date Gift Type Fund Description Amount

Note: The **Gift Type** column includes pending transactions. To avoid redundancy, you can exclude the **Pending** column if you include the **Gift Type** column.

- To include specific columns, select **Custom**.

Choose the columns to display

You can customize the appearance and content of the transaction manager. You can add and remove columns, and you can rearrange the order. To rename the column headings, use the Language tab.

☐ Default

☒ Custom

This option allows you to customize the appearance of the transaction manager page. You can remove columns, add columns to display additional information, and reposition columns.

Date Gift Type Amount Pay Method Balance Receipt Date

+ Add Column

Click **Add Column** and select each column to include in the giving history. To edit a column, click the column title in the list that appears. You can reposition the column or delete it from the giving history.

Note: An **Export** button appears on the web page so a user can export his active gifts and his giving history. The columns you select to display from this option are the columns that appear in the export output.

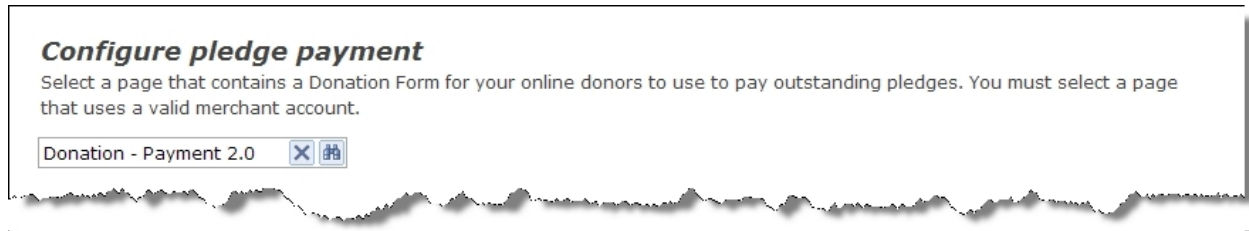
- Under **Choose the summary information to display**, select **Include gift totals section** to include a summary section that displays gift totals.

Additional options appear so you can select the columns to include in the summary section.

<input checked="" type="checkbox"/> Include gift totals section	This option adds a summary section for gift totals. The date range and designation filters also apply to this section.
<input checked="" type="checkbox"/> Include currency types	This option adds a column that displays all currencies the constituent used.
<input checked="" type="checkbox"/> Include gift total	This option adds a column that displays the total gift amount. This excludes all pending gifts, pending pledged gifts, and non-pending pledged gifts.
<input checked="" type="checkbox"/> Include soft credits total	This option adds a column to display the total soft credits amount.
<input checked="" type="checkbox"/> Include donation amount total	This option adds a column to display the total donation amount. This total excludes pending gifts, pledges, and soft credits.
<input checked="" type="checkbox"/> Include pledged gifts total	This option adds a column that displays the total pledged gift amount.
<input checked="" type="checkbox"/> Include pending gifts total	This option adds a column that displays the total pending gift amount. You cannot select this option if you did not select include pending online transactions.
<input checked="" type="checkbox"/> Include remaining pledge balance total	This option adds a column that displays the total remaining pledge amount.

Tip: The **Include soft credits total** and **Include donation amount total** checkboxes appear when you select **Include soft credits** under **Choose the gifts to display**.

- To allow website users to make payments against outstanding pledges, under **Configure pledge payment**, select the web page that contains the donation form to use for pledge payments.



Warning: You must select a donation form that includes a valid merchant account. You should not select a donation form that requires only the Pledge (Bill me later) payment method because website users cannot pay a pledge with another pledge. For more information about bank merchants, see the *Administration Guide*.

- Click **Save**. You return to *Parts*.

Unformatted Text

Use the Unformatted Text part to embed HTML text or scripts on a page. For example, you can paste in the embed code provided by *YouTube* to display a video. You can also use this part to enable Google *Analytics* E-Commerce tracking features.

For more information about how to configure the program to use Google *Analytics*, see the *Administration Guide*.

Warning: Code and scripts that you include in this part are beyond of the scope of Blackbaud Support.

> Design Unformatted Text

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

- From the Design tab, enter the HTML code or script in the box.
- To select additional options for the code, select **Show advanced options**.
- In the **Placement in HTML** field, select where to place the code in the page's HTML. You can place it in the <head> tag, at the bottom of the <body> tag, or within the <body> tag according to where you place this part on the page.

Warning: Code and scripts that you include in this part are beyond of the scope of Blackbaud Support.

Design Properties Usage Targeting & security Tags

Enter the HTML and/or script for the page. Click [here](#) for code examples you can use with this part.

```

if(LOGGEDIN){
  _gaq.push(['_setCustomVar', 1, 'userName', LOGGEDIN, 2]);
}else{
  _gaq.push(['_setCustomVar', 1, 'userName', 'Visitor', 2]);
}

```

☒ Show advanced options

Placement in HTML:
 In the <body> tag with the part ▼

Save Cancel

4. Click **Save**. You return to *Parts*.

User Email Preferences Form

Design the User Email Preferences Form to provide a way for website users to subscribe to and unsubscribe from email for chapters, newsletters, or notifications. You can also select constituent attributes from The Raiser's Edge to appear in an email preference list so users can subscribe to emails such as monthly or quarterly recurring messages.

Each email you create in Blackbaud NetCommunity Spark requires a link to a web page that includes this part. When a user clicks the link to view or change subscriptions, the program displays your organization's email options, and if the user has a constituent record in The Raiser's Edge, their subscription information automatically displays. For example, the user receives your monthly newsletter so its checkbox is selected on the page. When a user accesses the email preferences page directly on your site, they must log in so the program knows the identity of the user. Once logged in, the page displays the email options along with applicable subscription information.

A global opt-out checkbox always appears on the part so users can opt out of all email communications. When a user selects or clears this checkbox, a profile update transaction generates in The Raiser's Edge for you to process to the constituent record. After you process the transaction, the **Requests no email** checkbox updates according to the user's selection. Email preference changes for

chapter email, newsletters, notifications, and constituent attribute preferences automatically update constituent records without requiring you to process transactions.

➤ User Email Preferences Form Part Considerations

- When there are no email messages in your database for an email option, its section does not appear on the part. For example, if you do not use the Chapter Manager part on your website, the chapter email section does not appear on the email preferences web page.
- To provide at least one web page so users can subscribe to or unsubscribe from newsletters, you must grant the Everyone role view rights for at least one User Email Preferences Form part on a page. You can create other user email preferences form pages that exclude view rights for the Everyone role, but you must grant view rights for Everyone for at least one part on a page for newsletters.
- Newsletter subscriptions also derive from sending them. The program sends subscription newsletters to constituents on the assigned email lists, plus additional subscribers from the email preferences page. Explicit unsubscribers and users with **Requests No Email** do not receive the newsletters. The program prevents a duplicate email to the same record in The Raiser's Edge. It does not prevent duplicate emails when The Raiser's Edge query contains duplicate records unless you clear the **Send a unique email to each constituent who shares the same email address** checkbox in *Sites & settings*.
- The program automatically configures chapter email under the opt-out section. Blackbaud NetCommunity Spark groups "Chapter Manager part name — Chapter name List" for the list. For example, "Alumni Chapter Manager — San Diego List" is the Chapter Manager part named (Alumni Chapter Manager) — Chapter name (San Diego) List.

Chapter emails derive from the Chapter Manager part.

This information informs you of the email options that appear on the email preferences page based on whether the user has a constituent record in The Raiser's Edge and is a member of your website. The only option that appears at all times is the global opt-out checkbox so users can opt out of email communications from your organization.

- When a website user has a constituent record in The Raiser's Edge, but is not a member of your website, the email preferences page appears along with the user's subscription information. The user does not have to log in to your site because the link in the email automatically identifies the user.

In this scenario, the user is not a member of your site and cannot subscribe to chapter email or notifications. The user can subscribe to newsletters and constituent attribute based emails.

- When a website user has a constituent record in The Raiser's Edge and is also a member of your website, the email preferences page appears along with the user's subscription information. The user does not have to log in to your site because the link in the email automatically identifies the user.

In this scenario, the user can subscribe to chapter email, newsletters, notifications, and constituent attribute based emails.

- When a website user does not have a constituent record in The Raiser's Edge and is also not a member of your website, the user can subscribe to newsletters.

In this scenario, after the user creates an account and you process the sign-up request transaction to The Raiser's Edge, the user can return to the email preferences page and subscribe to chapter email, notifications, and constituent attribute based emails.

➤ Design User Email Preferences Form

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. Select the Design tab.
2. To enable users to specify their consent preferences for how they want to receive communication from your organization:

Consent

The Communication Consent part allows website users to specify their consent preferences for how they want to receive communication from your organization.

Consent part:

Communication Consent Part ▼

Under **Consent Preference**, select a saved Communication Consent part to include on the form. This part can only be included inline on the User Email Preferences form and not as an overlay.

Note: When the Communication Consent part is included on the User Email Preferences form, no profile update transaction is created in The Raiser's Edge when a user submits the form. The constituent's consent information is written directly to their record in The Raiser's Edge.

3. Under Email Preference, in the **Title** field, enter a title to appear on the web page for email preferences.

General

Title:

User Email Preference

Enter a user email preferences title to appear on the web page.

After update navigate to:

Select the page to appear after a website user updates the subscription.

4. In the **After update navigate to** field, browse to the page to appear after website users update subscription information. If you do not select a page, the page designated as the Home Page in *Sites & settings* appears for users.
5. Under **Attributes**, select the constituent attributes to appear as email preference options on the web page in the **Include** column. To change the text that appears for the attribute on the

web page, enter it in the **Caption** field, and to move an attribute in the list, click and drag the dotted button on the far left.

Attributes
Select the constituent attributes to display as email preference options on the web page. You can only use constituent attributes with a type of Yes/No and Table with this part.

Constituent attribute options

Include	Field	Caption
<input checked="" type="checkbox"/>	Planned Giving	Do you want to receive planned giving information?
<input checked="" type="checkbox"/>	eMessages	eMessages

You can only use constituent attributes with a type of Yes/No and Table with this part. Table type attributes are available without being marked as one per record. If you recently added a new constituent attribute in The Raiser's Edge and it does not appear in the grid or in *Sites & settings* for you to make it available on the web page, click **Refresh code tables** in *Code tables*. This updates code tables from The Raiser's Edge in Blackbaud NetCommunity Spark. For more information about how to update code tables, see the *Administration Guide*.

Tip: You may want to consider including the same constituent attributes on your User Login part for new registrations so that users can subscribe to emails as they register for your site.

- Under **Opt-out checkbox**, customize the instructions that appear for the opt-out section of the User Email Preferences form. In the **Opt-out checkbox label** field, enter the text to appear for the global opt-out checkbox on the website, such as "To no longer receive email from us, select the checkbox."

Opt-out checkbox
The opt-out checkbox on the email preferences form allows website users to indicate that they do not want to receive email messages from your organization.

Opt-out checkbox label: *

Enter a label for the checkbox to opt out of email messages.

For verification purposes, if a user selects to opt out of a newsletter, the user is asked to enter his or her email address. If the email address is not registered with the program, the user cannot opt out of the newsletter.

Note: Even when a user selects the global opt-out checkbox on the website, he or she continues to receive requested notifications and acknowledgment emails.

- Under **Subscriptions**, customize the instructions that appear for the subscriptions section of the User Email Preferences form. In the **Subscribe instructions** field, enter the text to appear for the newsletter subscription checkboxes on the website.

Subscriptions

Customize the email subscriptions text that is presented to users. Users can use this option to specify which subscriptions they want to receive.

Subscribe instructions:*

Please select the communications you would like to see from us. Your current subscriptions are already checked. Uncheck the box for

Enter the instructions for the subscriptions.

- Under **Directory messages opt-out**, select **Include opt-out for directory messages on this form** to enable website users to opt out of receiving email messages sent from other directory users. In the **Directory opt-out checkbox label** field, you can customize the text that displays for the opt-out checkbox on the User Email Preferences form.

Directory messages opt-out

This checkbox allows website users to indicate whether or not they want to receive email messages sent from other directory users on a Directory part.

☐ Include opt-out for directory messages on this form

Directory opt-out checkbox label:*

I do not want to receive messages from directory website users.

Enter a custom checkbox label for the option to opt out of directory email messages.

For verification purposes, if a user selects to opt out of directory messaging, the user is asked to enter his or her email address. If the email address is not registered with the program, the user cannot opt out of the messaging.

- To customize section titles with help text and additional messages that appear for the part, select the Language tab. For information about the Language tab, see [Language Tab on page 14](#).
- Click **Save**. You return to *Parts*.

User Login

To control the areas users can access on your website, create a User Login part. When a user logs in, the user login determines the roles that the user belongs to and the features that the user has security rights to access.

There are several important items to remember about the User Login part. Make sure you consider this information when you design the part.

- The part automatically includes sections for the login and logout pages. You can design the part to also include sections for the new user registration page and the forgotten password page.
- You create emails to acknowledge registrations and provide forgotten usernames.
- When you have multiple websites, create multiple login pages to provide access to each site.

- The Fundraiser part has its own user login. For information about how to create the user login for a Fundraiser, refer to the *Team Fundraising Guide*.
- **Note:** Blackbaud NetCommunity Spark does not support the Fundraiser part.
- You can enable social media to allow new users to register with their social network login. When you use the social media login option, you can indicate where to display the social media icons on login forms.
- Multiple users can use the same email address when they sign up for your site. This makes it easy for an entire family to sign up for a fundraiser or other event. If a family shares an email address and one user forgets a password or username, the reminder email contains all usernames associated with that email address. The password reset link connects to a page where the user can select the username that needs a new password.
- When you include a link to this part in an email message, you can create a special page link to send users to the login page and you can also create a special page link to send users to the forgotten password page. When you include this link in a message and an email recipient clicks the link, a secure page appears with a **Forgotten Password** field for the user to enter their email address. This link remains active in the email for the user to take action to reset the password any time. After the email address is submitted on the web page, another email sends to the user. That email contains another link that returns the user to the reset password page on your website. For more information about how to create a special page link, refer to the *Program Basics Guide*.

➤ Design User Login

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, when you configure social media for third-party authentication with social networks such as Facebook and Twitter, **Social website login** appears with the **Enable social website login** checkbox. To enable social media options for the login, select the checkbox. Additional options appear.
 - a. In the **Sign in text** field, enter the text to display for standard and social network login options.
 - b. In the **Social website sign in text** field, enter the text to display above the social site icons.
 - c. Under **Display options**, specify where to place the social site icons relative to the standard login fields.

Note: For more information about social media for third-party authentication, refer to the *Administration Guide*.

2. Under **Captions and properties**, select whether to include forms for new registrations or forgotten logins. To include a form, select its checkbox in the **Enabled** column.

Captions and properties

Select titles and hyperlink captions for the web page. You can edit the text to appear on the page on the *Language* tab.

Enabled	
Login	<input checked="" type="checkbox"/>
New User Registration	<input checked="" type="checkbox"/>
Forgotten Password/User ID	<input checked="" type="checkbox"/>
Forgotten Password	<input checked="" type="checkbox"/>
Forgotten User ID	<input type="checkbox"/>

Note: To change the caption for a form, select the *Language* tab. For information about the *Language* tab, see [Language Tab on page 14](#).

We recommend you clear **New User Registration** if you import records from The Raiser's Edge into the website. Imported users are registered automatically, so they do not need to register a second time with the User Login part. For information about how to import users, see the *Users & Security Guide*.

Note: After you create a login page with the User Login part, select it in the **Member Login Page** field in the **Registration and Login Options** frame on the *Settings* tab in *Sites & settings*. For more information, see the *Administration Guide*.

3. In the **Constituent code** field, select the constituent code to assign to users who use this form on your website. For more information about constituent codes, refer to the *Program Basics Guide*.
4. Under **Navigation**, select the web page to appear after users log in, log out, register, or reset passwords.
 - By default, the Login, Logout, and New user registration forms are set to the default home page you selected on the *Settings* tab in *Sites & settings*, and the Password reset form is set to blank.
 - To clear the web page selected for a form, click **Remove page** for that form. If you do not select a page for **New user registration**, users are directed to the page selected for the login form. If you do not select a page for **Password reset**, the program does not redirect users to another page. Instead, a message appears to indicate the password is reset.
5. Under **Additional fields**, select the biographical fields to include on the new user registration form.

Additional fields

Select which additional fields will be displayed during the user registration process.

Field	Include	Required
Title	<input type="checkbox"/>	<input type="checkbox"/>
Address block	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>
Middle name	<input type="checkbox"/>	<input type="checkbox"/>
Maiden name	<input type="checkbox"/>	<input type="checkbox"/>
Class of	<input type="checkbox"/>	<input type="checkbox"/>
Birth date	<input type="checkbox"/>	<input type="checkbox"/>
Lookup ID	<input type="checkbox"/>	<input type="checkbox"/>

- a. In the **Field** grid, select **Include** for each field to include on the form. To make a field required, select **Required**. When you select **Include** for the **Address block** field, it is automatically required.
- b. In the **Attribute** grid, select **Include** for each constituent attribute to include on the form. To change the text to appear on the web page, enter it in the **Caption** field. To make the attribute required, select its checkbox in the **Require** column. To move an attribute in the list, click and drag the dotted button on the far left.

The Raiser's Edge provides these constituent attributes. To add a new attribute for your part, create it in The Raiser's Edge. For example, you can use a constituent attribute to track t-shirt sizes for participants. To track this information, create a t-shirt size attribute. If you know an attribute exists, but do not see it online, check the Settings tab in *Sites & settings* to verify the attribute is available.

6. To enable users to specify their consent preferences for how they want to receive communication from your organization:

Consent

The Communication Consent part allows website users to specify their consent preferences for how they want to receive communication from your organization.

Consent part:
 Communication Consent Part ▼

Select how to display the consent options: ?

☐ Inline

☒ Overlay

- a. Under **Consent part**, select a saved Communication Consent part to include on the form.
- b. Select how you want the communication preference options to display — choose **Inline** to embed the options directly in the form itself or choose **Overlay** to display a pop-up window with the consent options when the form is submitted.

After users submit the form, their consent information is downloaded to the BBNC plugin along with their transaction. After the transaction is processed, their constituent record is updated in The Raiser's Edge with their communication consent preferences. If the user is logged in when they submit the form and their BBNC account is linked to a constituent record in The Raiser's Edge, their communication consent preferences are written directly to their record in The Raiser's Edge.

7. Under **Role assignment**, select the checkbox under **Member** for each role to assign to users who sign up through this User Login part.

Role assignment

Select which role to assign to users registering or joining on this page.

Role	Member
Content Authors	<input type="checkbox"/>
Members	<input checked="" type="checkbox"/>
Site Administrators	<input type="checkbox"/>

8. To create a reminder email to send to members who click **Forgotten Password/Username** or **Forgotten Password**, click **Forgotten Password/Username Email** on the action bar. The HTML editor appears. You can use the default text provided or enter different text.

Note: When you include the **Password Reset Link** merge field in the reminder email, the field displays as a secure link that remains active for 24 hours. When a user clicks the link, a secure page appears to enter and confirm a new password.

9. To create an email to send to new users after they register, click **New User Registration Email** on the action bar. The New User Registration Email screen appears. You can use the default

text provided or enter different text. Use the merge fields to include the username, password, and other personalization.

For information about how to create an email, refer to the *Email Guide*.

10. To create instructions to appear on the Login, New User Registration, and Forgot Password screens of the part, select the Helplets tab. For information about this tab, see [Helplets Tab on page 17](#).
11. To customize the messages and labels that appear for the part on your website, select the Language tab. For information about the Language tab, see [Language Tab on page 14](#).
12. Click **Save**. You return to *Parts*.

Volunteer Opportunity

Note: The Volunteer Opportunity part is not a standard feature in Blackbaud NetCommunity Spark. To learn how to upgrade Blackbaud NetCommunity Spark to include online volunteering, please email solutions@blackbaud.com.

If you use *Volunteer Management* for The Raiser's Edge, you can create a Volunteer Opportunity part to show a list of jobs on your website. A website user can learn about the volunteer jobs, sign up for a job position, and enter data that is relevant to the position. For example, the volunteer can provide emergency contact information, special skills and needs, and medical needs.

Note: For more information about volunteers and jobs in The Raiser's Edge, see the **Records** section in the Raiser's Edge help file.

With the Volunteer Opportunity part, you can create a volunteer page that includes a list of volunteer jobs at your organization. Once the user selects a job from the job list, details about the job appear, such as its description, start date, and position. After the user clicks the sign-up button, the volunteer sign-up form appears. The user completes this form to submit to your organization.

Volunteer transactions appear on the NetCommunity page in The Raiser's Edge. When a volunteer transaction processes, the data appears on the Volunteer tab on the user's constituent record and a job assignment for the user appears on the job record. For more information, see the *Blackbaud NetCommunity Spark & The Raiser's Edge Integration Guide*.

➤ Design Volunteer Opportunity

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see [Create and Edit Parts on page 7](#).

1. From the Design tab, in the **Constituent Code** field, select a constituent code to add for volunteers. For more information about constituent codes, see the *Program Basics Guide*.
2. In the **Volunteer Type** field, select a volunteer type to assign to the user, such as Coordinator or Gift Shop Staff. A volunteer type denotes how a volunteer serves your organization. The Raiser's Edge determines the volunteer types available in this field.

The Raiser's Edge determines the volunteer types available in this field. To add a type, create it in **Volunteer Types** table in The Raiser's Edge. For information, see *The Raiser's Edge Configuration & Security Guide*.

3. Under **Job List**, in the **Title** field, enter the title for the job list. Leave the default part name, or enter your own title, such as "Outside Volunteer Jobs." This title appears at the top of the volunteer web page.

Note: The **Job List** frame creates the first volunteer section of the web page.

- a. In the **Instructions** field, enter content to instruct the user on how to use the job list step. Leave the default instructions, or enter your own.
- b. You can select a job query that contains the jobs to appear in the job list for this part. For information about how to use the Query Search screen, see the *Program Basics Guide*.

Tip: For a query to appear as a selection, you must first create it in The Raiser's Edge. When you create a query, you may need to refresh the website for it to appear as a selection. To refresh, select **View, Refresh** from the menu bar.

- c. In the box under the **Jobs to Include** field, enter the text to appear if the query does not return job results, such as "There are no volunteer jobs at this time. Please check back next month." Leave the default message, or enter your own.
 - d. Under **Specify how you'd like the list to appear**, specify how job results appear. Select the number of jobs to appear per page, whether page links for the job appear above or below the results (or both), whether the job start and end dates appear, whether users can search the list, and whether to use the field names from The Raiser's Edge.

In the box under **Allow this list to be displayed**, enter the text to appear if no jobs match the user's job search, such as "Please search our volunteer jobs again! Your criteria did not return any jobs." Leave the default message, or enter your own.
 - e. To display custom field names from The Raiser's Edge, select **Use field names from The Raiser's Edge**. When you select this, text in the **Display As** column from *Configuration, Fields* in The Raiser's Edge appears on the web page for jobs. Otherwise, default field names appear. For more information, see *The Raiser's Edge Configuration Guide*.
4. Under **Job Detail**, in the **Instructions** field, enter content to instruct the user on how to use the job details step. These instructions appear after a user selects a job from the job list. Leave the default instructions, or enter your own.

Note: The **Job Detail** frame creates the second volunteer section of the web page.

- a. In the **Button Text** field, enter the text to appear on the button that creates the sign-up form for the job the user selects. You can leave the default text or write your own button text.
 - b. To display custom field names from The Raiser's Edge, select **Use field names from The Raiser's Edge**. When you select this, text in the **Display As** column from *Configuration, Fields* in The Raiser's Edge appears on the web page for jobs. Otherwise, default field names appear. For more information, see *The Raiser's Edge Configuration Guide*.
 - c. In the **Display** column, select the checkbox beside the volunteer attribute to appear. To change the text of the attribute on your donation page, enter the text in the **Caption** field.
5. Under **Volunteer Sign-Up Form**, in the **Instructions** field, enter content to instruct the user on how to use the sign-up step. These instructions appear after the user clicks the sign-up button on the job detail step.

If the **Minimum age** field on the job record in The Raiser's Edge contains an age, a required **Date of Birth** field appears after the instructions.

To display custom field names from The Raiser's Edge, select **Use field names from The Raiser's Edge**. When you select this, text in the **Display As** column from *Configuration, Fields* in The Raiser's Edge appears on the web page for volunteers. Otherwise, default field names appear. For more information, see *The Raiser's Edge Configuration Guide*.

Note: The **Volunteer Sign-Up Form** frame creates the third volunteer section of the web page.

In the **Button Text** field, enter the text to appear on the sign-up button. This button submits the sign-up form to your organization. You can leave the default text or write your own button text.

Tip: To sign up for a job, the user must be registered to your website.

6. To store volunteer emergency contact information, select **Emergency Contact Information**. To make this a required field on the sign-up form, select **Require emergency contact name and phone number**.
7. To display a **Vehicle** section on the sign-up step, select **Vehicle Information**.
In the **Available Checkbox Caption** field, enter text to appear beside the vehicle checkbox on the sign-up step. Leave the default text, or enter your own. On the sign-up step, a **Vehicle Type** field appears with this checkbox. The **Volunteer Vehicle Type** table in The Raiser's Edge determines the selections in this field.
8. To include an additional information section on the sign-up step, select **Additional Information**.
 - a. In the **Section Title** field, enter the text to appear at the top of the additional information section. Leave the default title, or enter your own.
 - b. In the **Instructions** field, enter content to instruct the user on how to use the additional information section. Leave the default instructions, or enter your own.
9. The job record determines the remaining sections available to add to the sign-up step. For example, you can create sections for skills and experience, courses and training, medical information, special needs, interests, or checklist items. To add a section to the sign-up step, select its checkbox and, in the **Section Title** and **Instructions** fields, enter the information to appear for the section.
10. Under **Navigation**, browse to the web page to appear after users submit volunteer sign-up requests. If you do not select a page, the home page from the Settings tab in *Sites & settings* appears by default.
11. Click **Next**. The Acknowledgement Email screen appears.
12. Create an acknowledgement email for website users who use the volunteer opportunity form to submit a volunteer sign-up request. You can use the default text provided or enter different text.

Tip: When you edit a Volunteer Opportunity part, you can click **Acknowledgement Email** to access the Acknowledgement Email screen. For information about how to design an email to acknowledge a volunteer sign-up request, see the *Email Guide*.

13. Click **Save**. You return to *Parts*.