

Web Forms Guide

12/02/2020Blackbaud Altru 5.19 Web Forms US

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In *Web*, you can create web forms to supplement your website and accept online payments. You can create donation forms to accept donations for designations, program forms to sell tickets for programs and their events, membership forms to sell memberships, and event registration forms to register guests for special events.

Before you create any web forms, you configure general settings such as the appearance of the web pages that display the forms and the shopping cart that processes transactions. For information about general settings, see:

- [Design Web Pages on page 46](#)
- [Browser Settings and Home Page URL on page 52](#)
- [Create Shopping Cart on page 55](#)
- [Design Acknowledgement Email on page 38](#)
- [Design Privacy Policy Page on page 51](#)
- [Design Email Preferences Page on page 42.](#)

After you configure the general settings, you configure form-specific settings for each type of web form. For example, you can set minimum gift amounts for donation forms, specify how long to keep tickets in shopping carts for program forms, select fields to include on membership forms, and select price types to include on event registration forms.

To manage web forms, go to *Web* and click the task for a form type. To create a form, select an item in the grid and click **Approve for website**. A green checkmark appears under **Live on website**, and the URL appears in the item details. Website users can access this URL to make donations, purchase tickets or memberships, or register for events.

Note: Designations, programs, memberships, and special events must be active when you click **Approve for website**. And the date range must also be current for designations.

Donation Forms

From *Web*, you can create and manage web forms to accept donations to your designations. These donation forms can complement your organization's existing website. For example, you can link to donation forms from your website. Other than the links, this requires no changes to your website, and if you stop accepting donations to a designation, you can remove its form from the web.

Note: The program displays each form on a web page with a standard design and format. Each form also shares a shopping cart, home page URL, and acknowledgement email message. To configure these settings, go to *Web* and select the tasks under **Configuration**. For information about these options, see [Design Web Pages on page 46](#), [Browser Settings and Home Page URL on page 52](#), [Create Shopping Cart on page 55](#), and [Design Acknowledgement Email on page 38](#).

To create donation forms, go to *Web* and click **Manage donation forms**. The Manage Donation Forms page appears. The grid displays your organization's designation hierarchy. You can access designation records, edit designations, create web forms for designations, and edit options for donation forms.

Manage Donation Forms

Designations (48) Filters

Public name: CAMP Live on website

Copy Edit Approve for website Options

Public name: CAMP Start date: End date:
Active: No Approved for website: No Live on website: No

- Campaign for Excellence
 - Campaign for Excellence...
 - Campaign for Excellence...
 - Campaign for Excellence...
 - Campaign for Excellence...

Under **Designations**, your organization's designation hierarchy from *Fundraising* appears. For information about designations and the designation hierarchy, see the *Fundraising Guide*. Under **Live on website**, green checkmarks appear for designations that have web forms. When you select an entry in the grid, details about the designation and its web form appear.

To create donation forms and manage existing web forms, select designations in the hierarchy and use the buttons on the Manage Donation Forms page.

- To open a designation record, click the name in the **Public name** column. The designation record appears.
- To edit a designation's properties, click **Edit**. The Edit designation screen appears. For a detailed explanation of the options on this screen, see the *Fundraising Guide*.
- To create a donation form for a designation, click **Approve for website**. If the designation is active and the current date is between its start and end dates, the program creates a donation form and a green checkmark appears under **Live on website**. The URL appears with the designation details in the grid. On the donation form, website users can donate to the designation and any child designations in the hierarchy that are approved for the website. If the green checkmark does not appear under **Live on website**, check the designation's status and its start and end dates to confirm that it is active and the date range is current.
- To remove a donation form, click **Exclude from website**. The designation still exists in the fundraising designation hierarchy, but its form is no longer active. If users attempt to access the form, the program redirects them to the home page you designate on the Website URL screen. For information about the home page, see [Browser Settings and Home Page URL on page 52](#).
- To configure donation form options such as minimum gift amount and whether to allow recurring gifts, click **Options**. The donation options screen appears. When you approve a designation for the website, it inherits the default donation form options. With the donation options, you can adjust the settings for each donation form. For more information, see [Donation Form Options on page 6](#).
- To filter the designations in the grid, use the filter tool. You can filter by the designation's name and whether it is approved for the website and whether a donation form is posted.

Donation Form Options

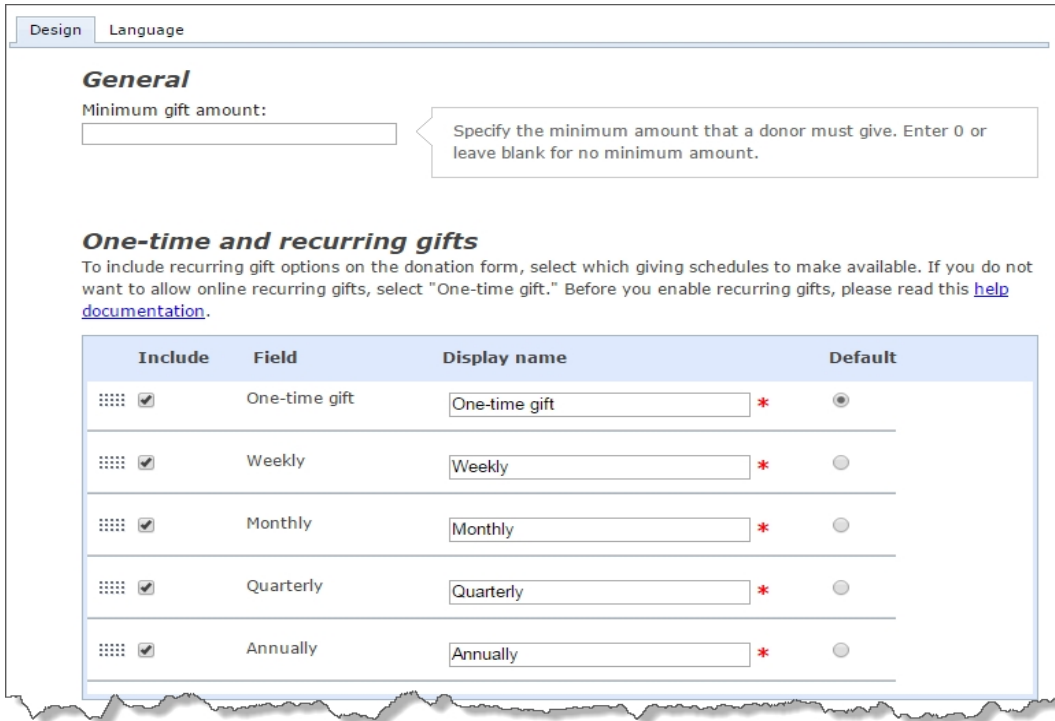
When you approve a designation for the website to create a web form, it inherits the default settings for donation forms. You can edit these settings as necessary for each donation form.

To configure donation form options, go to *Web* and click **Manage donation forms**. On the Manage Donation Forms page, select a designation with a web form and click **Options**. The donation form options appear. You can enter the minimum gift amount, select whether to allow recurring gifts, select the types of donations to allow, and set up your giving levels.

Note: The program routes all transactions through a shopping cart, and you must configure payment settings for the shopping cart before you process transactions. The program uses a single shopping cart for all web forms. To create the shopping cart, go to *Web* and click **Web payment settings** under **Configuration**. For more information, see [Create Shopping Cart on page 55](#).

➤ Configure options for a donation form

1. From *Web*, click **Manage donation forms**. The Manage Donation Forms page appears.
2. Under **Designations**, select a designation with a web form and click **Options**. The donation form options appear.



The screenshot shows the 'Options' page for a donation form. At the top, there are tabs for 'Design' and 'Language'. The page is divided into two main sections: 'General' and 'One-time and recurring gifts'.

General

Minimum gift amount:

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

One-time and recurring gifts

To include recurring gift options on the donation form, select which giving schedules to make available. If you do not want to allow online recurring gifts, select "One-time gift." Before you enable recurring gifts, please read this [help documentation](#).

Include	Field	Display name	Default
<input checked="" type="checkbox"/>	One-time gift	<input type="text" value="One-time gift"/>	<input checked="" type="radio"/>
<input checked="" type="checkbox"/>	Weekly	<input type="text" value="Weekly"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	Monthly	<input type="text" value="Monthly"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	Quarterly	<input type="text" value="Quarterly"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	Annually	<input type="text" value="Annually"/>	<input type="radio"/>

3. In the **Minimum gift amount** field, enter the minimum donation amount. To accept any gift amount, enter "0" or leave the field blank.
4. Under **One-time and recurring gifts**, you can allow recurring gifts. To include recurring gift options on the donation form, select which giving schedules to make available. If you do not want to allow online recurring gifts, only select "One-time gift." Select **Default** for the option you want selected by default on the web form.

Annually *

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

Allow comments

Giving levels
 You may set up 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**. If this form is supporting multiple designations, giving levels apply to each designation.

Display name	Amount (\$)
<input type="button" value="Add giving level"/>	

Note: You must use a responsive web from layout in *Page Designer* to enable online recurring gifts. If you are not using a responsive layout, the **One-time and recurring gifts** section is not available.

Note: If you include a recurring gifts schedule on a donation form for a top-level designation, those selected options do not automatically apply to donation forms for any lower-level designations in the hierarchy. You will have to configure each designation in the hierarchy individually.

Also, if you configure a recurring gifts schedule on the top-level designation, all designations in the hierarchy that are approved for the website are included as options in the Designation field on the web form. If you do not want users able to choose from all approved designations in the hierarchy, we recommend that you configure recurring gift schedules only on the lower-level designations you want to make available.

5. Under **Donor options**, select **Allow comments** to allow donors to enter comments on the donation form. A **Comments** field appears on the donation form. When you download user comments, they appear as notes on the Documentation tab of revenue records.
6. Under **Giving levels**, click **Add giving level** to create a giving level for your donors
 - a. Under **Display name**, enter the giving level name to appear on the website.
 - b. Under **Amount**, enter the minimum gift amount for the giving level.

- c. To include a blank field on the donation form for users to enter their own gift amounts, select **Allow other amount**.
7. To rename labels, headings, and other text on your donation forms, select the Language tab. You can also use this tab to enter localized text for other languages.

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

Category: Language:

Item name	Item type	Default text	Text
Additional Information	Heading	Additional Information	<input type="text" value="Additional Information"/>
Additional Information Introductory Text	Field label		<input type="text"/>

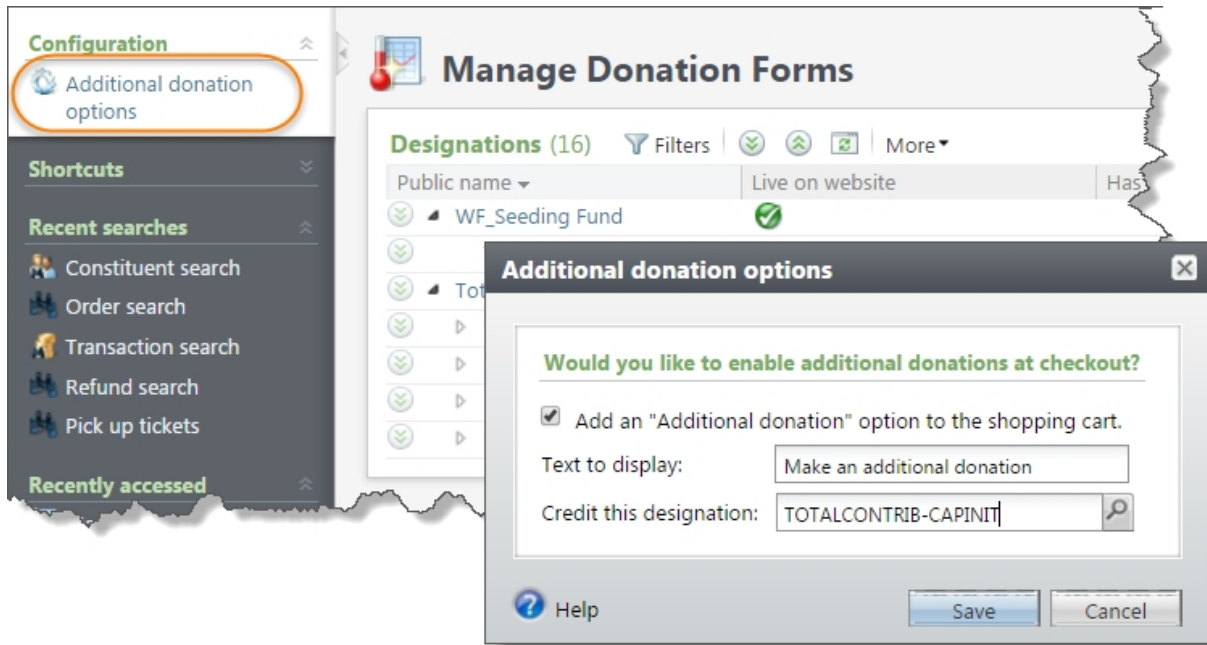
8. In the **Category** field, select the section of the donation form to edit.
9. In the **Language** field, select the language to localize.
10. The **Item name** and **Item type** columns identify items on the donation form, and the **Default text** column displays the default text. Under **Text**, rename the default labels, headings, and other text as necessary.
 For example, to change the **Amount** field label to "Total," enter the new label under **Text**. Likewise, to localize the field label, select a language in the **Language** field and enter localized text under **Text**.
11. Click **Save**. You return to the Manage Donation Forms page.

Configure Options for Additional Donations in the Shopping Cart

Web site users can make an additional donation from the shopping cart as part of an online sales transaction.

From the Manage Donation Forms page in *Web*, click **Additional donation options** under **Configuration**.

Note: You must use a responsive web from layout in Page Designer to enable additional donations. If you are not using a responsive layout, the **Additional donation options** configuration task does not appear on the Manage Donation Forms page.



On the Additional donations options screen, select **Add an "Additional donation" option to the shopping cart** and select the designation to credit. If you'd like to use a different label for the option on the web form, enter it in the **Text to display** field.

Once enabled, the additional donation option appears in the shopping cart. Web site users can enter the amount they want to give.

The screenshot shows a web interface for 'Things & Stuff Museum'. On the left is a green navigation menu with links: Home, Admission, Family memberships, Event Rental, and Donate Now. The main content area has an orange header with the museum name. In the top right, there is an 'Empty Cart' button. Below this is a 'Tickets' section with two items: 'Daily Admission - Adult' (2 at \$5.00, total \$10.00) and 'Daily Admission - Child' (1 at \$2.00, total \$2.00). Each item has a 'Remove' button. Below the tickets is a 'Make an additional donation' section with a text input field, a dollar sign icon, and an 'Add' button. The total amount is displayed as 'Total: \$12.00'. At the bottom, there is a dropdown menu for 'How do you want us to deliver the tickets?' set to 'eTicket', and a 'Discount code:' field with an 'Apply' button.

Program Forms

From *Web*, you can create and manage web forms to allow website users to purchase tickets to your programs and events.

Note: The program form does not apply to program events that require registration. To sell tickets to program events that require registration, you use the event registration form.

Your program forms complement your organization's existing website. For example, you can create program forms and post links on your website. Other than the links, this requires no changes to your website, and when an event ends and you no longer want to sell tickets, you can exclude the event to remove the form from the web.

Note: Each form appears on a web page with a standard design and format. Each form also shares a shopping cart, home page URL, and acknowledgement email message. To configure these settings, go to *Web* and select the tasks under **Configuration**. For information about these options, see [Design Web Pages on page 46](#), [Browser Settings and Home Page URL on page 52](#), [Create Shopping Cart on page 55](#), and [Design Acknowledgement Email on page 38](#).

To create program forms, go to *Web* and click **Manage program forms**. The Manage Program Forms page appears. The grid displays your organization's programs and events. You can access

program and event records, edit programs and events, approve programs and events for the website to create web forms, and edit the program form options that apply to all program forms.

Under **Programs and events**, your organization's programs and events from *Tickets* appear. For information about programs and events, see the *Tickets Guide*. Under **Live on website**, green checkmarks appear for programs or events that have web forms. When you select an entry in the grid, details about the program or event and its web form appear.

To create program forms and manage existing web forms, select programs or events in the grid and use the buttons on the Manage Program Forms page.

- To open a program or event record, click the name in the **Name** column. The program or event record appears.
- To edit an event's properties, select it and click **Edit, Event**. The Edit event screen appears. For a detailed explanation of the options on this screen, see the *Tickets Guide*.
- To edit the description for an event's web form, click **Edit, Description**. The Edit event description for web forms screen appears. By default, events inherit descriptions from programs. For more information, see the *Tickets Guide*.
- To create a program form for a program or event, click **Approve for website**. If the program or event is active, the program creates a program form and a green checkmark appears under **Live on website**. The URL appears with the program or event details in the grid. On the program form, website users can purchase tickets for the program or event. For programs, they can also purchase tickets for any of its events that are approved for the website. If the green checkmark does not appear under **Live on website**, check the program or event's status to confirm that it is active.
- To remove a program form, click **Exclude from website**. The program or event still exists in the database, but its form is no longer active. If users attempt to access the form, the program redirects them to the home page you designate on the Website URL screen. For information about the home page, see [Browser Settings and Home Page URL on page 52](#).

- To filter the programs and events in the grid, use the filter tool. You can filter by event name or by when a program or event occurs.
- To configure program form options such as such as how far in advance to sell tickets and how long tickets can remain in shopping carts, click **Online settings for tickets** under **Configuration**. The program options screen appears. The settings on this screen apply to all program forms. For more information, see [Program Form Options on page 13](#).

Program Form Options

Before you approve a program or event for the website, you must configure program form options such as how far in advance to sell tickets and how long tickets can remain in shopping carts.

Note: Unlike donation forms and membership forms, you cannot edit settings for each program form. Settings for program forms apply to all programs and events that you enable for the website.

To configure program form options, go to *Web* and click **Manage program forms**. On the Manage Program Forms page, click **Online settings for tickets** under **Configuration**. The program options screen appears. You can select a thumbnail for tickets in the shopping cart, when to put tickets on sale, how many tickets website users can buy, how long tickets remain in shopping carts, when to indicate tickets are nearly sold out, and whether to display sold out events. You can also enter an email address for website users to contact.

Note: The program routes all transactions through a shopping cart, and you must configure payment settings for the shopping cart before you process transactions. The program uses a single shopping cart for all web forms. To create the shopping cart, go to *Web* and click **Web payment settings** under **Configuration**. For more information, see [Create Shopping Cart on page 55](#).

➤ Configure options for program forms

1. From *Web*, click **Manage program forms**. The Manage Program Forms page appears.
2. Under **Configuration**, click **Online settings for tickets**. The program form options appear.

Design
Language

Thumbnail:

No image selected

X
🔍

On-sale period:*
 (days)

Ticket limit:*

Timeout:
 (minutes)

Threshold for low availability:
 (tickets)

Continue to post events after tickets sell out.

Contact email address:

Allow users to filter summary lists by category

Select an image to appear with tickets in the shopping cart summary.

Enter how far in advance to sell tickets. For example, enter "7" to sell tickets to all events that occur during the week that starts with the current date.

Enter the maximum number of tickets that a website user can purchase. The limit applies to each event, but a user can buy additional tickets for other dates and times.

Enter how long tickets remain in shopping carts. After the time elapses, tickets return to the inventory that is available for sale.

To indicate an event is near maximum capacity when a limited number of tickets remain, enter the number of tickets to use as the threshold.

When you add programs and events to the website, the program creates summary lists for each. To allow users to filter the lists, select this checkbox. Dropdown lists appear on the web pages that display the programs and events lists.

3. To select an image to appear beside tickets in the shopping cart, click **Select** in the **Thumbnail** field. The Select Image From Image Library screen appears.
 - To select an image in a category folder, select the folder on the Categories tab. Images in the folder appear. To create, rename, or delete category folders, use the buttons on the Categories tab.
 - To search for an image, select the Search tab. You can search by name, ID, type, approval status, and category folder. Click **Search**. The images that meet your search criteria appear.
 - To upload an image, click **Add image(s)**. On the Add image(s) screen, click **Browse**. On the Choose file screen, select an image and click **Open**. Under **Name** and **Caption**, enter a name for the image and a caption to appear on the website. Under **Image options**, select a category folder or enter a name to create a folder.

To approve the image for the website, select **Approved**. Click **Upload Image(s)**. You return to Select Image From Image Library screen.

After you select an image, click **OK**. You return to the Program Forms Options screen.

4. In the **On-sale period** field, enter how far in advance to sell tickets.
5. In the **Ticket limit** field, enter the maximum number of tickets that a website user can purchase at a time for the program or event.

Note: Ticket limits set for members only programs and events override the ticket limit set here.

6. In the **Timeout** field, enter how long users can keep tickets in their shopping carts. If the time limit passes, the program removes tickets from shopping carts and returns them to the available pool of tickets so that other website users can purchase them.

Note: The minimum timeout is 15 minutes, but for no timeout, you can enter "0."

7. In the **Threshold for low availability** field, enter when to indicate that events are near maximum capacity. When the number of tickets falls below the threshold, the program indicates on program forms that the event is nearly sold out.
8. To continue to display events on program forms after tickets sell out, select **Continue to post events after tickets sell out**.
9. In the **Contact email address** field, enter the email address for website users to contact your organization with questions about events or programs.

Note: To display your contact email address on the program form, you must add a "MAILTO" href on the Language tab. For example, you can display the email address in the message that appears after an event sells out. On the Language tab, you can go to the **Text** column for the "Sold out availability label, long" entry and overwrite the default text with something like "This event has sold out. Please contact MAILTO for more information."

10. To allow users to filter the programs and events that appear on forms, select **Allow users to filter summary lists by category**.
11. To rename labels, headings, and other text on your program forms, select the Language tab. You can also use this tab to enter localized text for other languages.

Note: To edit date formats in the **Event Details, Events, and Programs** categories for programs and events, you must use valid date format specifiers. For information about specifiers, see <http://msdn.microsoft.com/en-us/library/8kb3ddd4.aspx>.

Design Language

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

Category: Price Types Language: English (United States)

Item name	Item type	Default text	Text
Name header	Message	Category	Category
Price header	Message	Price	Price
Quantity header	Message	Quantity	Quantity
Validator header	Message		

12. In the **Category** field, select the section of the program form to edit.
13. In the **Language** field, select the language to localize.
14. The **Item name** and **Item type** columns identify items on the program form, and the **Default text** column displays the default text. Under **Text**, rename the default labels, headings, and other text as necessary.
 For example, to change the first sold out message from "Sold Out!" to "Event is Sold Out," enter "Event is Sold Out" under **Text** in the **Sold Out availability label, long** field. Likewise, to localize the same message, select a language in the **Language** field and enter localized text under **Text** in the **Sold Out availability label, long** field.
15. Click **Save**. You return to the Manage Program Forms page.

Configure Options for Member Restricted Events

You can sell online tickets to members only events. For example, you can offer access to special events, such as a Behind the Scenes Tour or a Meet the Author Night, as a benefit of membership. On scheduled programs and events, you can specify which types of members are eligible to purchase tickets and set the maximum number of tickets they are allowed to buy.

Members must sign in to your website to verify their eligibility to purchase restricted tickets. If users are not eligible members, customizable text and options appear on the form to encourage them to purchase the required membership.

You must configure options for each members only program event you want to sell online. From the Manage Program Forms page in *Web*, expand the event to configure. Then click the **Options** button. This button appears only for programs and events with members only restrictions.

Manage Program Forms

Programs and events (25) More ▾

Event name: Date: Next 10 days ▾ From: 12/2/2015 To: 12/12/2015 Apply Reset

Name	Date	Start time	Live on website	Has active acknowledgeme...
<input type="checkbox"/> Daily Admission				
<input type="checkbox"/> Daily Admission Program				
<input type="checkbox"/> Fee program				
<input type="checkbox"/> Historic Gardens				
<input type="checkbox"/> nikki test				
<input type="checkbox"/> nikki's daily admission				
<input type="checkbox"/> Shark walk				
<input type="checkbox"/> Tax and fee program				
<input type="checkbox"/> Web Forms Admission				
<input type="checkbox"/> Members Only event				
<input checked="" type="checkbox"/> Members Only event	6/23/2016	7:00 PM		
Copy ▾ Edit ▾ Disable online sales Acknowledgement email ▾ Options				
Program: Members Only event Approved for website: Yes Event: Members Only event Web sale date: 6/22/2016 3:12:00 PM Remaining capacity: 200/200 URL: altrudemo.hostingtest.com/altrudemo/tickets?tab=2&txobjid=6520609e-34de-4e45-b3bb-5890a4b6e4a3				
<input type="checkbox"/> test2				
<input type="checkbox"/> Urban Green Spaces				

On the Options screen, you can customize the buttons and text that appear on the form for this event.

- You can include a sign-in button to verify membership eligibility. (You must have User Registration enabled in *Web*.)
- You can include a button that directs users to the page where they can purchase the required membership. Enter the URL for the eligible membership form or for your main membership page, if multiple types of memberships are eligible. If you do not enter a valid URL, the purchase button will not appear.
- You can customize the form's headings and error messages. The **Ticket limit per transaction** field displays a default message with the ticket limit and how many tickets the patron currently has in the cart. You can edit only the words in this message—if you edit the existing merge fields ({0} or {1}), or add new merge fields, you will receive an error.

Options

Buttons to include

- Include a "Sign in" button for users to verify their eligibility
Text on button:
- Include a button to direct ineligible users to another page
Text on button:
Direct ineligible users to this page:

Member event information

Event heading:

Event description:

Not eligible description:

Error messages

Ineligible to purchase:

Ticket limit per transaction:

Shopping cart

Member event information:

Here is an example of what the default options will look like on a form for non-members that are logged in.

- You must purchase the appropriate membership to be eligible to buy tickets to this event.

Behind the scenes tour

MEMBERS ONLY, please sign in

This is a members only or member pre-sale event. You must sign in to verify your eligibility.



Friday June 24



8:00 AM – 9:00 AM

Go behind the scenes and see where the magic happens! This is a members only event with limited tickets so get yours today!

[Sign in](#)

Not a member or not registered on this site, but still want to attend this event?

[Purchase membership](#)

Manage Combination Forms

Use combination web forms to sell ticket combinations online. With this web form, patrons can select which combinations to purchase, add them to the cart, enter payment information, check out, and then print tickets. Unlike other types of web forms, online combinations are configured directly from the combination record in *Tickets*. On the Web forms tab of the combination record, you can configure descriptions for the combination and all related programs and events. You can also create a custom acknowledgement email and select whether to allow event conflicts. For more information, refer to [Configure Combination Web Forms](#).

From *Web*, you can click **Manage combination forms** link to open the Combinations page. From this page, you can open online combinations to make adjustments to their web form configurations. The **Approved for web** column quickly identifies which combinations can be sold online.

Membership Forms

From *Web*, you can create and manage web forms to allow website users to purchase memberships from your organization. These membership forms complement your organization's existing website. For example, you can create membership forms and post links on your website. Other than the links, this requires no changes to your website, and if a

membership program ends, you can exclude the membership program to remove the form from the web.

Note: Each form appears on a web page with a standard design and format. Each form also shares a shopping cart, home page URL, and acknowledgement email message. To configure these settings, go to *Web* and select the tasks under **Configuration**. For information about these options, see [Design Web Pages on page 46](#), [Browser Settings and Home Page URL on page 52](#), [Create Shopping Cart on page 55](#), and [Design Acknowledgement Email on page 38](#).

To create membership forms, go to *Web* and click **Manage membership forms**. The Manage Membership Forms page appears. The grid displays your organization's membership programs and their membership levels. You can access membership program and level records, edit membership programs and levels, approve membership programs and levels for the website to create web forms, and edit the membership form options for your web forms.

Name	Description	Live on website
Aquarium membership		
Family		
Contribution Based		
Family		
Garden memberships		✓
Copy Exclude from website Options		
Program name: Garden memberships Active: Yes Approved for website: Yes		
URL: ptlr37.blackbaud.com/NetCommunity/Garden-memberships		
Family membership		✓
Recurring/Sustaining		
Family		
Standard Membership		✓
Family		✓
Super Family		

Under **Membership programs**, your organization's membership programs and their membership levels from *Fundraising* appear. For information about membership programs, see the *Fundraising Guide*. Under **Live on website**, green checkmarks appear for the membership programs and levels that have web forms. When you select an entry in the grid, details about the membership program or level and its web form appear.

To create membership forms and manage existing web forms, select membership programs or membership levels in the grid and use the buttons on the Manage Membership Forms page.

- To open a membership program or membership level record, click the name in the **Name** column. The membership program or level record appears.
- To edit a membership program or level's properties, click **Edit**. The Edit membership program screen or Edit membership level screen appears. For a detailed explanation of

the options on this screen, see the *Fundraising Guide*.

- To create a membership form for a membership program or membership level, click **Approve for website**. If the membership program is active, the program creates a membership form and a green checkmark appears under **Live on website**. The URL appears with the membership program or membership level in the grid. On the membership form, website users can purchase memberships. If the green checkmark does not appear under **Live on website**, check the membership program's status to confirm that it is active.

Note: Membership forms are only available for annual membership programs with dues-based membership levels. Other types of membership programs, such as recurring or lifetime memberships, may appear on the Manage Membership Forms page, but the **Approve for website** button is disabled when you select them.

- To remove a membership form, click **Exclude from website**. The membership program or level still exists in the database, but its form is no longer active. If users attempt to access the form, the program redirects them to the home page you designate on the Website URL screen. For information about the home page, see [Browser Settings and Home Page URL on page 52](#). Also, if you exclude a membership level but not its membership program, users can not select that level on the web form for the membership program.
- To configure membership form options such as the fields to include, click **Options**. The Membership Form Options screen appears. When you approve a membership program or level for the website, it inherits the default membership form options. With the membership form options, you can adjust the settings for each membership form. For more information, see [Membership Form Options on page 21](#).
- To filter the membership programs and levels in the grid, use the filter tool. You can filter by membership program name or by whether the membership programs are active.
- To configure renewal form options such as the fields to include, click **Renewal options** under **Configuration**. The Renewal options screen appears. The settings on this screen apply to all membership renewal forms. For more information, see [Membership Renewal Options on page 23](#).

Note: If an existing member purchases a membership for a membership program that only allows one membership per person, the membership form automatically renews the membership. But if the membership program allows multiple members, the membership form adds an additional membership to the patron record.

Warning: If a membership program has too many members available for a web form, you may encounter performance issues or a poor user experience. If these occur, reduce the number of possible members on the Levels tab of the membership program record. We recommend allowing no more than 10-15 members per level.

Membership Form Options

When you approve a membership program or level for the website to create a web form, it inherits the default settings for membership forms. You can edit these settings as necessary for

each membership form.

To configure membership form options, go to *Web* and click **Manage membership forms**. On the Manage Membership Forms page, select a membership program or level with a web form and click **Options**. The membership form options appear. You can select the fields to include and require and edit text that appears on the form.

Note: The program routes all transactions through a shopping cart, and you must configure payment settings for the shopping cart before you process transactions. The program uses a single shopping cart for all web forms. To create the shopping cart, go to *Web* and click **Web payment settings** under **Configuration**. For more information, see [Create Shopping Cart on page 55](#).

➤ Configure options for a membership form

1. From *Web*, click **Manage membership forms**. The Manage Membership Forms page appears.
2. Under **Membership programs**, select a membership program or level with a web form and click **Options**. The membership form options appear.
3. If the membership program is configured to allow automatic renewals, under **Automatically renew**, select **Automatically renew membership**. With this option selected, the **Renew this membership automatically when it expires** option appears on the membership web form.
4. Under **Fields to include**, select the optional fields to include on the form and whether to require website users to complete these fields.
You cannot exclude fields that are included by default, but you can select whether to require users to complete them.
5. Under **Add-ons**, select the add-ons to include on the form and how many to make available. Add-ons allow website users to add additional members or "benefit" type add-ons to their memberships. If your membership program does not include add-ons, the grid does not appear.

Note: Additional member add-ons do not affect the number of cards that are available for membership programs. You enter the number of available cards on membership programs, and add-on members only receive cards if they are still available after all other members receive their cards.

For more information about add-ons, see *Memberships Guide*.

6. On the Language tab, you can rename labels, headings, and other text for the membership form. You can also enter localized text for other languages.

Design Language

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

Category: Help text Language: English (United States)

Item name	Item type	Default text	Text
Membership	Message	Select your membership options.	Select your membership options.
Membership type	Message	Membership type:	Membership type:
Registration	Message	Enter the names to include on the membership.	Enter the names to include on the

- In the **Category** field, select the section of the membership form.
- In the **Language** field, select the language to localize.
- The **Item name** and **Item type** columns identify items on the membership form, and the **Default text** column displays the default text. Under **Text**, rename the default labels, headings, and other text as necessary.

For example, to change the **Membership Level Required** message to "Select a level for your membership," enter the new message under **Text**. Likewise, to localize the message, select a language in the **Language** field and enter localized text under **Text**.

- Click **Save**. You return to the Manage Membership Forms page.

Membership Renewal Options

In addition to the membership forms that you create to sell memberships online, the program also creates a membership renewal form. When you send membership renewal notices via email, you can include a link to the renewal form to allow website users to renew memberships online. Users can renew memberships online even when membership programs do not have membership forms.

For information about how to set up and process membership renewal notices, see the *Memberships Guide*.

Note: If website users try to renew memberships on a membership form, they may unintentionally purchase additional memberships. If the membership program only allows one membership per person, the web form automatically renews the membership. However, if the membership program allows multiple memberships, the web form adds an additional membership to the patron record.

To configure renewal form options, go to *Web* and click **Manage membership forms**. On the Manage Membership Forms page, click **Renewal options** under **Configuration**. The Renewal options screen appears. You can rename labels, headings, and other text that appear on the membership renewal form.

➤ Configure options for membership renewal forms

1. From *Web*, click **Manage membership forms**. The Manage Membership Forms page appears.
2. Under **Configuration**, click **Renewal options**. The Renewal options screen appears.
3. Under **Fields to include**, select the optional fields to include on the form and whether to require website users to complete these fields.

Design Language

Fields to include

Select the fields to include on the membership form. Then select whether to require users to complete these fields before they submit the form.

Primary member

Include	Field	Require
<input type="checkbox"/>	Title	<input type="checkbox"/>
<input checked="" type="checkbox"/>	First name	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Phone (gifts only)	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Email (gifts only)	<input checked="" type="checkbox"/>

Additional member

Include	Field	Require
<input type="checkbox"/>	Title	<input type="checkbox"/>
<input checked="" type="checkbox"/>	First name	<input checked="" type="checkbox"/>

Add-ons

The membership renewal form automatically inherits add-ons from membership forms. To allow members to purchase add-ons during renewals, you must include them on the membership web forms for your membership programs.

You cannot exclude fields that are included by default, but you can select whether to require users to complete them.

Note: When a website user opens a membership renewal form, the fields display data for existing members. To change the members for a membership, users can edit the data in the member fields as necessary.

4. On the Language tab, you can rename labels, headings, and other text for the membership renewal form. You can also enter localized text for other languages.

Design Language

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

Category: Gift information Language: English (United States)

Item name	Item type	Default text	Text
Gift checkbox	Field label	This membership is a gift	<input type="text" value="This membership is a gift"/>
Gift heading	Field label	Gift information	<input type="text" value="Gift information"/>
Recipient heading	Field label	Recipient information	<input type="text" value="Recipient information"/>
Renewal option 1: Recipient	Field label	Gift recipient	<input type="text" value="Gift recipient"/>
Renewal option 2: Gift giver	Field label	Myself	<input type="text" value="Myself"/>
Renewal option 3: Both	Field label	Both	<input type="text" value="Both"/>
Renewal options	Field label	Send renewal notice to	<input type="text" value="Send renewal notice to"/>

5. In the **Category** field, select the section of the membership renewal form.
6. In the **Language** field, select the language to localize.
7. The **Item name** and **Item type** columns identify items on the membership renewal form, and the **Default text** column displays the default text. Under **Text**, rename the default labels, headings, and other text as necessary.

For example, to change the **Membership Level Required** message to "Select a level for your membership," enter the new message under **Text**. Likewise, to localize the message, select a language in the **Language** field and enter localized text under **Text**.

8. Click **Save**. You return to the Manage Membership Forms page.

Event Registration Forms

From *Web*, you can create and manage web forms to allow website users to register for special events and pre-registered program events.

Note: The event registration form does not apply to program events that do not require registration. To sell tickets to program events that do not require registration, you use the program form.

Your event registration forms can complement your organization's existing website. For example, you can link to event registration forms from your website. Other than the links, this requires no changes to your website, and when an event ends, you can simply remove the form from the web and its link from your site.

Note: Each form appears on a web page with a standard design and format. Each form also shares a shopping cart, home page URL, and acknowledgement email message. To configure

these settings, go to *Web* and select the tasks under **Configuration**. For information about these options, see [Design Web Pages on page 46](#), [Browser Settings and Home Page URL on page 52](#), [Create Shopping Cart on page 55](#), and [Design Acknowledgement Email on page 38](#).

To create event registration forms, go to *Web* and click **Manage event registration forms**. The Manage Event Registration Forms page appears. The grid displays your organization's special events and program events that require registration. You can access event records, edit events, create web forms, and edit options for the forms.

Manage Event Registration Forms

Events (1) [Icons]

Date: Next 30 days From: 4/3/2012 To: 5/3/2012 [Apply] [Reset]

Only show live events Event name: [Text Box]

Name	Date	Start time	Live on website
[Icon] Annual Gala	8/31/2012	5:00 PM	[Green Checkmark]

[Edit] [Exclude selected events from website] [Options]

Event: Annual Gala Available capacity: 978 out of 1000 Date and time: 8/31/2012 5:00 PM - 10:00 PM
Active: Yes Approved for website: Yes Live on website: Yes
URL: ptlr37.blackbaud.com/NetCommunity/Annual-Gala

Under **Events**, your organization's special events from *Events* and program events that require registration appear. For information about special events, see the *Events Guide*. For information about program events, see the *Tickets Guide*. Under **Live on website**, green checkmarks appear for events that have web forms. When you select an entry in the grid, details about the event and its web form appear.

To create event registration forms and manage existing web forms, select events in the grid and use the buttons on the Manage Event Registration Forms page.

- To open an event record, click the name in the **Name** column. The event record appears.
- To edit an event's properties, click **Edit, Event**. The Edit event screen appears. For a detailed explanation of the options on this screen, see the *Events Guide* for special events or the *Tickets Guide* for program events.
- To edit the description for an event's web form, select it and click **Edit, Description**. The Edit event description for web forms screen appears. By default, program events inherit descriptions from programs. For more information, see the *Events Guide* for special events or the *Tickets Guide* for program events.
- To create a web form, click **Approve for website**. If the event is active, the program creates an event registration form and a green checkmark appears under **Live on website**. The URL appears with the event details in the grid, and website users can access this URL.

to register for the event. If the green checkmark does not appear under **Live on website**, check the event's status to confirm that it is active.

- To remove an event registration form, click **Exclude from website**. The event still exists in the database, but its form is no longer active. If users attempt to access its URL, the program redirects them to the home page that you enter on the Website URL screen. For information about the home page, see [Browser Settings and Home Page URL on page 52](#).
- To configure options for the event registration form such as the price types to display and how many attendees website users can register, click **Options**. The event registration options screen appears. When you approve an event for the website, it inherits default settings, but you can edit these settings as necessary for each form. For more information, see [Event Registration Form Options on page 27](#).
- To filter the events in the grid by name, status, or date, use the filter tool.

Event Registration Form Options

When you approve a special event for the website to create a web form, it inherits default settings. You can edit these settings as necessary for each event registration form.

To configure the options for an event registration form, go to *Web* and click **Manage event registration forms**. On the Manage Event Registration Forms page, select an event with an active web form and click **Options**. The event registration form options appear. You can select a thumbnail for registrations in the shopping cart, the price types to display, the number of attendees that a website user can register, how long registrations remain in shopping carts, and when to indicate that an event is nearly sold out. You can also edit text that appears on the form.

Note: The program routes all transactions through a shopping cart, and you must configure payment settings for the shopping cart before you process transactions. The program uses a single shopping cart for all web forms. To create the shopping cart, go to *Web* and click **Web payment settings** under **Configuration**. For more information, see [Create Shopping Cart on page 55](#).

> Configure options for an event registration form

1. From *Web*, click **Manage event registration forms**. The Manage Event Registration Forms page appears.
2. Under **Events**, select an event with a web form and click **Options**. The event registration options appear.

Design Language

Display options

Thumbnail:

No image selected

✕ 📁

Select an image to appear with event registrations in the shopping cart summary.

Select the price types to include on the form. For each price type, select whether to require users to enter registrant information for guests. To edit the order of price types on the web form, click and drag them in the list.

Note: If an **Include** checkbox is disabled, the price type is not available for online sales.

	Include	Price type	Price	Guest details are optional
⋮	<input checked="" type="checkbox"/>	Family	\$50.00	<input checked="" type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Corporate Sponsor	\$500.00	<input checked="" type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Individual	\$25.00	<input checked="" type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Member - Family	\$100.00	<input checked="" type="checkbox"/>

Registration options

Ticket limit: *

Enter the maximum number of attendees that a website user can register for the event.

Timeout:

(minutes)

Enter how long registrations remain in shopping carts.

Threshold for low availability:

(tickets)

To indicate an event is near maximum capacity when a limited number of attendees can register, enter the number of remaining registrations to use as the threshold.

3. To select an image to appear beside registrations in the shopping cart, click **Select** in the **Thumbnail** field. The Select Image From Image Library screen appears.
 - To select an image in a category folder, select the folder on the Categories tab. Images in the folder appear. To create, rename, or delete category folders, use the buttons on the Categories tab. To upload an image, click **Add image(s)**. On the Add image(s) screen, click **Browse**. On the Choose file screen, select an image and click **Open**. Under **Name** and **Caption**, enter a name for the image and a caption to appear with it. Under **Image options**, select a category folder or enter a name to create a folder. To approve the image for the website, select **Approved**. Click **Upload Image(s)**. You return to Select Image From Image Library screen
 - To search for an image, select the Search tab. You can search by name, ID, type, approval status, and category folder. Click **Search**. The images that meet your search criteria appear.
 - To upload an image, click **Add image(s)**. On the Add image(s) screen, click **Browse**. On the Choose file screen, select an image and click **Open**. Under **Name** and **Caption**, enter a name for the image and a caption to appear with it. Under **Image**

options, select a category folder or enter a name to create a folder. To approve the image for the website, select **Approved**. Click **Upload Image(s)**. You return to Select Image From Image Library screen

After you select an image, click **OK**. You return to the event registration form options.

4. In the price type grid, select the price types to include on the event registration form. To edit the order of price types on the form, click and drag them within the grid.
5. In the **On-sale period** field, enter how far in advance to sell tickets for program events that require registration. This option is not available for special events.
6. In the **Ticket limit** field, enter the maximum number of attendees that a website user can register at a time for the event.
7. In the **Timeout** field, enter how long users can keep registrations in their shopping carts. If the time limit passes, the program removes registrations from shopping carts.

Note: The minimum timeout is 15 minutes, but for no timeout, you can enter "0."

8. In the **Threshold for low availability** field, enter when to indicate that the event is near maximum capacity. When the number of openings for attendees falls below the threshold, the program indicates on the form that the event is nearly sold out.

Note: You must enter a low-availability message on the Language tab. In the **Event details** category, enter this message in the **Low availability** field. You can also enter a message in the **Ample availability** field to display before the event reaches low availability.

Fields to include
Select the fields to include on the event registration form. Then select whether to require users to complete these fields before they submit the form.

Individual

Include	Field	Require
<input type="checkbox"/>	Title	<input type="checkbox"/>
<input checked="" type="checkbox"/>	First name	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Email address	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Phone number	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Address	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Meal Preference	<input type="checkbox"/>
<input checked="" type="checkbox"/>	T-Shirt Size	<input type="checkbox"/>

9. Under **Fields to include**, select the optional fields to include on the form for each price type and whether to require website users to complete these fields.

The grid does not display required fields. Likewise, you cannot exclude fields that are included by default, but you can select whether to require users to complete these fields.

10. To rename labels, headings, and other text on your event registration form, select the Language tab. You can also use this tab to enter localized text for other languages.

Design Language

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

Category: Page Language: English (United States)

Item name	Item type	Default text	Text
Add to cart	Button	Add to cart	Add to cart
Register	Button	Register	Register
Update cart	Button	Update cart	Update cart
Update quantities	Button	Update quantities	Update quantities

11. In the **Category** field, select the section of the event registration form to edit.
12. In the **Language** field, select the language to localize.
13. The **Item name** and **Item type** columns identify items on the form, and the **Default text** column displays the default text. Under **Text**, rename the default labels, headings, and other text as necessary.

For example, to change the sold out message from "Sold Out!" to "This event is sold out," enter "This event is sold out" under **Text** in the **Sold out availability** field. Likewise, to localize the same message, select a language in the **Language** field and enter localized text under **Text** in the **Sold out availability** field.

14. Click **Save**. You return to the Manage Event Registrations Forms page.

Configure Options for Member Restricted Preregistered Events

You can sell online tickets to members only events. For example, you can offer access to special events, such as a Behind the Scenes Tour or a Meet the Author Night, as a benefit of membership. On preregistered programs and events, you can specify which types of members are eligible to purchase tickets and set the maximum number of tickets they are allowed to buy.

Members must sign in to your website to verify their eligibility to purchase restricted tickets. If users are not eligible members, customizable text and options appear on the form to encourage them to purchase the required membership.

You must configure options for each members only preregistered program event you want to sell online. From the Manage Event Registration Forms page in *Web*, expand the preregistered event and click **Options**.

On the Design tab, you can include a sign-in button to verify membership eligibility. (You must have User Registration enabled in *Web*.) You can also include a button that directs users to the page where they can purchase the required membership.

Design Language

Membership fields to include

You can include a sign in button to require users to verify that their membership level qualifies them for the promotion. You can also include a button that directs ineligible users to another page, such as a membership form, so they can purchase the correct membership level to qualify.

Include	Field	Field type
<input checked="" type="checkbox"/>	Sign in to verify eligibility	Button
<input checked="" type="checkbox"/>	Direct ineligible users to another page	Button

On the Language tab, you can customize the form's headings and error messages. In the **Category** field, select "Membership - Member event and sign in information" or "Membership - Not eligible to purchase information" to customize those sections of the form.

- In the **Direct ineligible users to another page URL** field, enter the URL to the eligible membership form or to your main membership page, if multiple types of memberships are eligible. If you do not enter a valid URL, the purchase button will not appear.
- You can customize the form's headings and error messages. The **Ticket limit per transaction** field displays a default message with the ticket limit and how many tickets the patron currently has in the cart. You can edit only the words in this message—if you edit the existing merge fields ({0} or {1}), or add new merge fields, you will receive an error.

Design Language

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

Category: Language:

Item name	Item type	Default text	Text
Member only/Presale description	Message	This is a members only or member pre-sale event. You must sign in to verify your eligibility.	<input type="text" value="This is a members only or member"/>
Member only/Presale information	Message	MEMBERS ONLY, please sign in	<input type="text" value="MEMBERS ONLY, please sign in"/>
Sign in to verify eligibility	Button	Sign in	<input type="text" value="Sign in"/>

Design **Language**

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

Category: Language:

Item name	Item type	Default text	Text
Direct ineligible users to another page button caption	Button	Purchase membership	<input type="text" value="Purchase membership"/>
Direct ineligible users to another page URL	Message	<Enter a valid URL>	<input type="text" value="<Enter a valid URL>"/>
Non-member or non-registrant caption	Field label	Not a member or not registered on this site, but still want to attend this event?	<input type="text" value="Not a member or not registered on"/>

Here is an example of what the default options will look like on a form for non-members that are logged in.

Things & Stuff Museum

Home
News
Contact
About

[Register](#)
[Sign in](#)

- You must purchase the appropriate membership to be eligible to buy tickets to this event.

Behind the scenes tour

MEMBERS ONLY, please sign in

This is a members only or member pre-sale event. You must sign in to verify your eligibility.

Friday June 24

8:00 AM – 9:00 AM

Go behind the scenes and see where the magic happens! This is a members only event with limited tickets so get yours today!

Sign in

Not a member or not registered on this site, but still want to attend this event?

Purchase membership

Event Package Forms

From *Web*, you can create and manage web forms to allow website users to register for event packages.

Note: The event package form only applies to programs that require registration and contain event packages. To sell tickets to programs that do not contain packages, use the program form or event registration form.

Your event package forms can complement your organization's existing website. For example, you can link to event package forms from your website. Other than the links, this requires no changes to your website, and when an event ends, you can simply remove the form from the web and its link from your site.

Note: Each form appears on a web page with a standard design and format. Each form also shares a shopping cart, home page URL, and acknowledgement email message. To configure these settings, go to *Web* and select the tasks under **Configuration**. For information about these options, see [Design Web Pages on page 46](#), [Browser Settings and Home Page URL on page 52](#), [Create Shopping Cart on page 55](#), and [Design Acknowledgement Email on page 38](#).

To create event package forms, go to *Web* and click **Manage event package forms**. The Manage Event Package Forms page appears. The grid displays your organization's preregistered programs with event packages and their associated events.

To enable event package forms and manage existing web forms, select packages in the grid and use the buttons on the Manage Event Package Forms page. If **Allow patrons to register for individual events sold online or through Daily Sales** is selected on a package record, you can also select events in the grid to manage web form settings for the individual events.

- To open a package or event record, click the name in the **Name** column. The selected record appears.
- To edit a package or event's properties, click **Edit, Package** or **Edit, Event**. The Edit screen appears.
- To edit the description for a package or event web form, select it and click **Edit, Description**. The Edit event description for web forms screen appears.
- To create a web form, click **Approve for website**. If the package or event has an active web form, a green checkmark appears under **Live on website**. The URL appears with the event details in the grid, and website users can access this URL to register for the package or event.

Note: If **Allow patrons to register for individual events sold online or through Daily Sales** is selected on a package record, you'll need to approve each individual event you want to sell on the website.

- To remove a package or event registration form, click **Exclude from website**. The record still exists in the database, but its web form is no longer active. If users attempt to access its URL, the program redirects them to the home page that you enter on the Website URL screen. For information about the home page, see [Browser Settings and Home Page URL on page 52](#).

- To configure options for package and event forms, such as the price types to display and how many attendees website users can register, click **Options**. The event registration options screen appears. When you approve an event for the website, it inherits default settings, but you can edit these settings as necessary for each form. For more information, see [Configure options for an event package form on page 34](#).
- To create a custom default acknowledgment email, select the item in the grid, and click **Acknowledgment email, Edit**. The Acknowledgment screen appears. For information about the Acknowledgement screen, see [Design an acknowledgement email message on page 39](#).
- To filter the events in the grid by name, status, or date, use the filter tool.

Event Package Form Options

When you approve an event package for the website to create a web form, it inherits default settings. You can edit these settings as necessary for each form.

To configure the options for an event package form, go to *Web* and click **Manage event package forms**. On the Manage Event Package Forms page, select a package with an active web form and click **Options**. The event package form options appear. You can select a thumbnail for registrations in the shopping cart, the price types to display, the number of attendees that a website user can register, how long registrations remain in shopping carts, and when to indicate that an event is nearly sold out. You can also edit text that appears on the form.

Note: The program routes all transactions through a shopping cart, and you must configure payment settings for the shopping cart before you process transactions. The program uses a single shopping cart for all web forms. To create the shopping cart, go to *Web* and click **Web payment settings** under **Configuration**. For more information, see [Create Shopping Cart on page 55](#).

> Configure options for an event package form

1. From *Web*, click **Manage event package forms**. The Manage Event Package Forms page appears.
2. Under **Packages**, select a package with a web form and click **Options**. The event package options appear.

Note: If **Allow patrons to register for individual events sold online or through Daily Sales** is selected on a package record, you can also select events in the grid to manage options for the individual events.

3. To select an image to appear beside registrations in the shopping cart, click **Select** in the **Thumbnail** field. The Select Image From Image Library screen appears.
 - To select an image in a category folder, select the folder on the Categories tab. Images in the folder appear. To create, rename, or delete category folders, use the buttons on the Categories tab. To upload an image, click **Add image(s)**. On the Add

image(s) screen, click **Browse**. On the Choose file screen, select an image and click **Open**. Under **Name** and **Caption**, enter a name for the image and a caption to appear with it. Under **Image options**, select a category folder or enter a name to create a folder. To approve the image for the website, select **Approved**. Click **Upload Image(s)**. You return to Select Image From Image Library screen

- To search for an image, select the Search tab. You can search by name, ID, type, approval status, and category folder. Click **Search**. The images that meet your search criteria appear.
- To upload an image, click **Add image(s)**. On the Add image(s) screen, click **Browse**. On the Choose file screen, select an image and click **Open**. Under **Name** and **Caption**, enter a name for the image and a caption to appear with it. Under **Image options**, select a category folder or enter a name to create a folder. To approve the image for the website, select **Approved**. Click **Upload Image(s)**. You return to Select Image From Image Library screen

After you select an image, click **OK**. You return to the event package form options.

4. In the price type grid, select the price types to include on the event package form. To edit the order of price types on the form, click and drag them within the grid.
5. In the **On-sale period** field, enter how far in advance to sell tickets for event packages.
6. In the **Ticket limit** field, enter the maximum number of attendees that a website user can register at a time for the event package.
7. In the **Timeout** field, enter how long users can keep registrations in their shopping carts. If the time limit passes, the program removes registrations from shopping carts.

Note: The minimum timeout is 15 minutes, but for no timeout, you can enter "0."

8. In the **Threshold for low availability** field, enter when to indicate that the event package is near maximum capacity. When the number of openings for attendees falls below the threshold, the program indicates on the form that the package is nearly sold out.

Note: You must enter a low-availability message on the Language tab. In the **Event details** category, enter this message in the **Low availability** field. You can also enter a message in the **Ample availability** field to display before the event reaches low availability.

Fields to include

Select the fields to include on the event registration form. Then select whether to require users to complete these fields before they submit the form.

Individual

Include	Field	Require
<input type="checkbox"/>	Title	<input type="checkbox"/>
<input checked="" type="checkbox"/>	First name	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Email address	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Phone number	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Address	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Meal Preference	<input type="checkbox"/>
<input checked="" type="checkbox"/>	T-Shirt Size	<input type="checkbox"/>

- Under **Fields to include**, select the optional fields to include on the form for each price type and whether to require website users to complete these fields.

The grid does not display required fields. Likewise, you cannot exclude fields that are included by default, but you can select whether to require users to complete these fields.

- To rename labels, headings, and other text on your event registration form, select the Language tab. You can also use this tab to enter localized text for other languages.

Item name	Item type	Default text	Text
Add to cart	Button	Add to cart	<input type="text" value="Add to cart"/>
Register	Button	Register	<input type="text" value="Register"/>
Update cart	Button	Update cart	<input type="text" value="Update cart"/>
Update quantities	Button	Update quantities	<input type="text" value="Update quantities"/>

- In the **Category** field, select the section of the event package form to edit.
- In the **Language** field, select the language to localize.
- The **Item name** and **Item type** columns identify items on the form, and the **Default text** column displays the default text. Under **Text**, rename the default labels, headings, and other text as necessary.

For example, to change the sold out message from "Sold Out!" to "This event is sold out," enter "This event is sold out" under **Text** in the **Sold out availability** field. Likewise, to localize the same message, select a language in the **Language** field and enter localized text under **Text** in the **Sold out availability** field.

- Click **Save**. You return to the Manage Event Package Forms page.

Approve and Exclude from Website

To create a web form for a designation, event, program, or membership program, go to the applicable page in *Web*, select the item in the grid, and click **Approve for website**. To create a web form, the item you select also must have an active status and the current date must fall between its start and end dates.

For example, to create a donation form, go to on the Manage Donation Forms page, select a designation under **Designations** and click **Approve for website**. If the designation is active and the current date is between its start and end dates, the program creates a donation form and a green checkmark appears under **Live on website**. On the donation form, website users can donate to the designation and to any of its child designations in the hierarchy that are approved for the website. Similarly, on the Manage Program Forms page, you can select a program or event and click **Approve for website** to create a program form. And on the

Manage Membership Forms page, you can select a membership program and click **Approve for website** to create a membership form.

The URL for the web form you create appears under **Details**. If the URL does not appear and the green checkmark does not appear under **Live on website**, check the status and start and end dates under **Details** to confirm that the item is active and the date range is current.

To remove a web form from your website, select it and click **Exclude from website**. The designation, event, program, or membership program still exist in your database, but the web form is no longer active. If users attempt to access the form, the program redirects them to the home page you enter on the Website URL screen. For information about how to designate the home page, see [Browser Settings and Home Page URL on page 52](#).

Custom Acknowledgment Emails for Web Forms

After you setup a default Acknowledgement email for your web forms, you can edit it so it can be used for specific designations, event programs, and membership programs. For information about how to create a default Acknowledgement email, see [Design Acknowledgement Email on page 38](#).

To create a custom default acknowledgment email, go to the applicable page in *Web*, select the item in the grid, and click **Acknowledgment email, Edit**. The Acknowledgement screen appears. Make the necessary changes and click **Save**. For information about the Acknowledgement screen, see [Design an acknowledgement email message on page 39](#).

To enable an acknowledgement email for a specific designation, event or membership level, select the item in the grid, and click **Acknowledgment email, Enable**.

Note: If you do not edit the default acknowledgement email for a specific item, the default acknowledgement email is sent. If you edit an acknowledgement email for a top-level program it applies to the programs below it. Any enabled acknowledgement email specific to an item overrides any of the defaults.

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Before you create web forms in *Web* to supplement your organization's website, you must configure general settings for the web pages where the forms appear. You use the page designer to format the appearance of the pages. When you create web forms, the program creates web pages to display the forms and uses the design settings from the page designer. You also create a shopping cart to process transactions, and the program routes all transactions from your web forms to the shopping cart. You can also enter a URL for when the program needs to redirect users, design an acknowledgement message, edit your privacy policy, and edit the email preferences page.

After you configure these general settings for all web pages, you also configure settings for donation, program, and membership web forms. For example, you can set minimum gift amounts for donation forms, specify how long to keep tickets in shopping carts, and rename labels on membership forms. For information about these form types and their individual settings, see [Donation Forms on page 5](#), [Program Forms on page 11](#), or [Membership Forms on page 19](#).

Design Acknowledgement Email

Before you create web forms in *Web*, we recommend that you design an acknowledgement message to send after users check out. After website users donate on donation forms or purchase tickets and memberships on program forms and membership forms, the program directs users to shopping carts to process their transactions. If you design an acknowledgement message, the program emails it to users after they check out.

To design the acknowledgement message, go to *Web* and click **Acknowledgement email** under **Configuration**. The Acknowledgement email screen appears. On this screen, you use the HTML editor to design and format your email message.

You can also edit the default Acknowledgement message on a specific designation, event program, and membership program. For information about how to edit an Acknowledgement message, see [Custom Acknowledgment Emails for Web Forms on page 37](#).

In addition to the acknowledgement message, you also must configure the appearance and format of your web pages and create a shopping cart to process transactions. For information about these options, see [Design Web Pages on page 46](#) and [Create Shopping Cart on page 55](#). You can also enter a URL for when the program needs to redirect users, edit your privacy policy, and edit the email preferences page. For information about these options, see [Browser Settings and Home Page URL on page 52](#), [Design Privacy Policy Page on page 51](#), and [Design Email Preferences Page on page 42](#).

➤ Design an acknowledgement email message

1. From *Web*, click **Acknowledgement email** under **Configuration**. The Acknowledgement screen appears.

Acknowledgement email
Design the acknowledgement email to send users after they check out.

Name of email: *

Subject: *

From address: * From name: *

Reply address:

Notifications are to be sent to the following address

Failures:

Hide options

Formatting Insert View Image

Cut Copy Paste

Font family Font size

B I U ABC A ab

Find and replace

Format

Remove formatting

Dear ,

Thank you for your contribution. To achieve our mission, we rely on the generous support of individuals like you. We are grateful for your generosity and hope you take great pride in the difference it makes.

Here is a summary of your contribution:

Total:

Path: p

2. Under **Acknowledgement email**, enter a name for the acknowledgement email message, a subject to include in the **Subject** field of the email message, and an email address and name to include in the **From** field of the email message.
3. To receive responses at a different email address than the one you use to send the message, enter a return address in the **Reply address** field.

Tip: Most of the fields under **Acknowledgement email** are also used for system email messages. The name and subject are specific to the acknowledgement email, but the other fields apply to confirmation emails that website users receive after they register and to eTicket emails that users receive after they purchase tickets online for program events.

4. In the HTML editor, enter the content for the acknowledgement email message and format the appearance and layout. To include personalized information, use merge fields.

For information about the buttons and menus on the HTML editor toolbar, see the *General Features Guide*.

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

Best Practices for Acknowledgement Emails

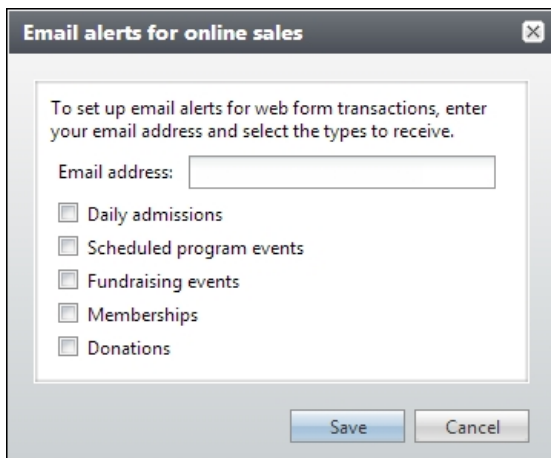
- Include the name of your organization in the subject line.
- Click **More Options** link and select the option to receive failures. Enter the email address you want to receive failure alerts. This allows you to follow up with constituents that are missing confirmation for transactions.
- Use the HTML editor to insert your organization's logo or banner to reinforce your visual brand.
- Use a table to restrict the width of the email to 580 px to display on a mobile screen without horizontal scroll.
- Include merge fields such as the user's name to personalize the message.
- Always include a link back to your organization's website and event calendar.
- Include text that explains how the transaction will appear on the user's credit card statement.

Email Alerts for Online Sales

From *Web* and *Sales*, you can set up email alerts for online sales to notify you when website users submit orders on your web forms. You can use these alerts to track activity on your web forms and to access registrant information and sales order information outside of the program. For example, you can use alerts to monitor how quickly events fill up so that you can adjust capacity or resources as necessary, or you can use them as prompts to follow up with registrants, major donors, or other website users who submit web forms.

To set up email alerts, you specify an email address to send the alerts to and then select the types of online transactions that prompt alerts. For example, to receive alerts after online donations, include the donation transaction type so that you will receive alerts after any online sales order that includes a donation.

To set up email alerts, go to *Web* or *Sales* and click **Email alerts for online sales** under **Configuration**. The Email alerts for online sales screen appears.



In the **Email address** field, enter an email address to send alerts to after web form transactions.

Note: Application users can only set up email alerts for one email address per user, and they cannot set up alerts for email addresses that already receive alerts.

In the list of checkboxes, select the types of transactions to receive alerts for. You can receive alerts for ticket sales, event registrations, membership sales, and donations.

Note: The **Daily admissions**, **Scheduled program events**, and **Fundraising events** checkboxes all relate to events. To receive alerts when you sell tickets to program events on your program forms, select **Daily admissions**. To receive alerts when you sell tickets to pre-registered program events on your event registration forms, select **Scheduled program events**. And to receive alerts when you sell registrations to special fundraising events from *Events* on your event registration forms, select **Fundraising events**.

Manage Email Alerts

After you set up email alerts in *Web* or *Sales* to notify you about transactions on web forms, you can use the Email alerts management page to view email alert settings and remove alerts for email addresses as necessary. For example, if employees leave your organization, you can remove the alerts for their email addresses.

To access the Email alerts management page, go to *Web* and click **Email alerts management** under **Configuration**. The Email alerts management page appears.

Email alerts management

Subscriptions (5) [Icons]

Search [Input] Columns Save list Open list Page 1 of 1

	Email address	Application user	Daily adm...	Scheduled pr...	Fundraising ev...	Memberships	Donations
<input type="checkbox"/>	chris@blackbaud.com	ChristopherRoAL...	Yes	Yes	Yes	Yes	Yes
<input type="checkbox"/>	dan@blackbaud.com	DanielleWiALTRU3	Yes	Yes	Yes	Yes	Yes
<input type="checkbox"/>	jon@blackbaud.com	JonathonLeALTRU3	Yes	Yes	Yes	Yes	Yes
<input type="checkbox"/>	allen@blackbaud.com	TuiAALTRU3	Yes	Yes	Yes	Yes	Yes
<input type="checkbox"/>	sarah@blackbaud.com	SarahKaALTRU3	Yes	No	No	No	No

The **Subscriptions** grid displays a list of the email addresses that receive email alerts and the types of alerts that they receive. To remove alerts for an email address, select its entry in the grid and click **Delete**.

Design Email Preferences Page

In addition to the web forms you create in *Web*, the program also creates a page where website users can opt out of email messages from your organization. You can include a link to this page in the email messages you send. The page consists of a page header and a checkbox for users to refuse email. When a website user selects the opt-out checkbox, the program updates the constituent record to select the **Do not send email to this address** checkbox for the email address.

To edit the email preferences page, go to *Web* and click **Email preferences** under **Configuration**. The Email preferences screen appears. On this screen, you can edit the page title and the label for the opt-out checkbox.

In addition to the email preferences, you also must configure the appearance and format of your web pages and create a shopping cart to process transactions. For information about these options, see [Design Web Pages on page 46](#) and [Create Shopping Cart on page 55](#). You can also enter a URL for when the program needs to redirect users, design an acknowledgement message, and edit your privacy policy. For information about these options, see [Browser Settings and Home Page URL on page 52](#), [Design Acknowledgement Email on page 38](#), and [Design Privacy Policy Page on page 51](#).

> **Edit email subscription preferences**

1. From *Web*, click **Email preferences** under **Configuration**. The Email preferences screen appears.

2. In the **Title** field, enter a header for the web page.
3. In **Opt-out checkbox label** field, enter the label for the checkbox that users select to opt out of email messages from you organization.

For verification purposes, users who opt out of email messages must enter their email addresses. If email addresses are not registered, user cannot opt out because they are not on the email list.

4. To customize the message that appears after users opt out of email messages, select the Language tab. You can also use this tab to enter localized text for other languages.

Item name	Item type	Default text	Text
Email Opt-In Confirmation	Message	We added the email address to our mailing lists.	We added the email address to ou
Email Opt-Out Confirmation	Message	We removed the email address from our mailing lists.	We removed the email address fro
Global Email Opt-Out	Message	You have selected to globally opt out of all email communications. This will remove any subscriptions that you have selected above.	You have selected to globally opt c
Invalid email address	Message	Please enter a valid email address.	Please enter a valid email address.
Opt-out limit reached	Message	This option is temporarily unavailable. Please try again later.	This option is temporarily unavailat
Unidentified email address	Message	To no longer receive email from us, please enter your email address:	To no longer receive email from us,

5. In the **Category** field, "Messages" is the only option.

6. In the **Language** field, select the language to localize.
7. Under **Text**, edit the confirmation messages that appear when users opt in or out of email messages. The **Default text** column displays the default messages.
8. Click **Save**. You return to *Web*.

Design eTickets Page

The eTickets page allows patrons to access tickets for programs and events that they purchase through Advance Sales or Online Sales. When a patron chooses the eTickets delivery method, **Altru** automatically sends them an email message with a link to the eTickets page. On this page, they can view their tickets and print them from home to present at program events. Tickets include the ticket number and a barcode that allows you to scan tickets. The ticket number and barcode ensure that a ticket cannot be used twice.


Note: Note: To enable eTickets, you must include it as a delivery method under the sales method configuration. From *Tickets*, select **Sales methods**, then select Advance Sales or Online Sales. Under **Delivery methods**, add the eTickets delivery method. If you don't want to use the default eTickets delivery method, you can create your own delivery method to deliver tickets via email. For information about how to manage delivery methods and sales methods, see the *Tickets Guide*.

On the editor for the eTickets page, you can edit the page's default text as necessary and add additional text above or below the tickets. For example, you can include instructions about how users should present their tickets or additional information about tickets.

> Edit the eTickets page

1. From *Web*, click **eTickets** under **Configuration**. The eTickets screen appears.

The screenshot shows the 'Design' tab of the eTickets configuration editor. At the top, there are tabs for 'Design' and 'Language'. Below the tabs is a header instruction: 'Edit the header, body text, and footer for the eTickets page where website users can print tickets from home.' The main area contains a 'Logo' section with a placeholder box that says 'No image selected' and a binoculars icon. Below the logo is a 'Click here to preview' link. The body text area contains a text box with the default message: 'Thank you for your purchase. To use your tickets for admission, please click print.' To the right of this text is a 'Print' button with a printer icon. Below the body text is another text box for additional information. The footer section contains a sample ticket layout with fields for 'Order # 12345678', 'Organization name', 'Event name', 'Event location', 'Event date (Day, Month, Year)', 'Event start time', 'Ticket # 12345678', and 'Ticket price type - Price'. At the bottom of the editor are 'Save' and 'Cancel' buttons.

2. To add an image to the eTickets page, under **Logo**, select the binoculars . Choose the image from the image library, or upload a new file from your device or network.
3. In the text box at the top of the editor, a default header for the eTickets page appears. You can edit it as necessary.
4. In the text boxes below the header and the sample ticket, you can enter additional text for the body and footer of the eTickets page. For example, you can provide instructions or communicate special considerations about tickets. By default, no text appears in these text boxes.

Note: The **Print** button and sample ticket on the editor are for display only, and you cannot edit them.

5. To edit the error messages associated with the eTickets page, select the Language tab. You can also use this tab to enter localized text for other languages.

Design Language

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

Category: Validation Language: English (United States)

Item name	Item type	Default text	Text
Canceled order	Message	We're sorry, but no tickets are available for this URL. Your tickets may have been cancelled, or an error may have occurred during the transaction. For assistance in resolving your sales order, please contact us directly by phone or email.	We're sorry, but no tickets are avai
		We're sorry, but your tickets aren't available. An error occurred during the transaction. We were no	

6. In the **Category** field, the "Validation" section of the eTickets page is selected by default.
7. In the **Language** field, select the language to localize.
8. The **Item name** and **Item type** columns identify items on the eTickets page, and the **Default text** column displays the default text. In the **Text** column, edit the text as necessary.
9. Click **Save**. You return to *Web*.

Design Web Pages

Before you create web forms in *Web*, you must configure design settings to determine the appearance and format of the web pages where the forms appear. The pages that display donation, program, and membership web forms all inherit these design settings.

Note: The secure payment page that processes credit card transactions also inherits your design settings. However, to help you comply with the Payment Card Industry Data Security Standard (PCI DSS), the program analyzes the secure payment page for compliance purposes and removes content that is not PCI DSS compliant. The program removes active content such as script tags, inline data in custom stylesheets, buttons, and dynamic HTML markup. As a result, if you include active content in the header, footer, or columns of your web page design, the secure payment page's appearance differs slightly from the pages that contain your web forms.

To configure the design settings, go to *Web* and click **Page designer** under **Configuration**. The page designer appears. On the Select Layout tab, select a layout to organize the items on your web pages. Each layout is "responsive" which means it automatically adjusts the page's size and format to accommodate all screen sizes, including mobile devices. The layout shifts the form's fields and options neatly into a row to fit the narrow width of a mobile device and the fonts are enlarged to make it easier to read text and complete transactions.

Warning: If your organization implemented **Altru** before November 2015, the Page Designer will also include non-responsive layouts. If your web forms are still using a non-responsive layout, we recommend that you convert to get the benefits and features provided by responsive layouts.

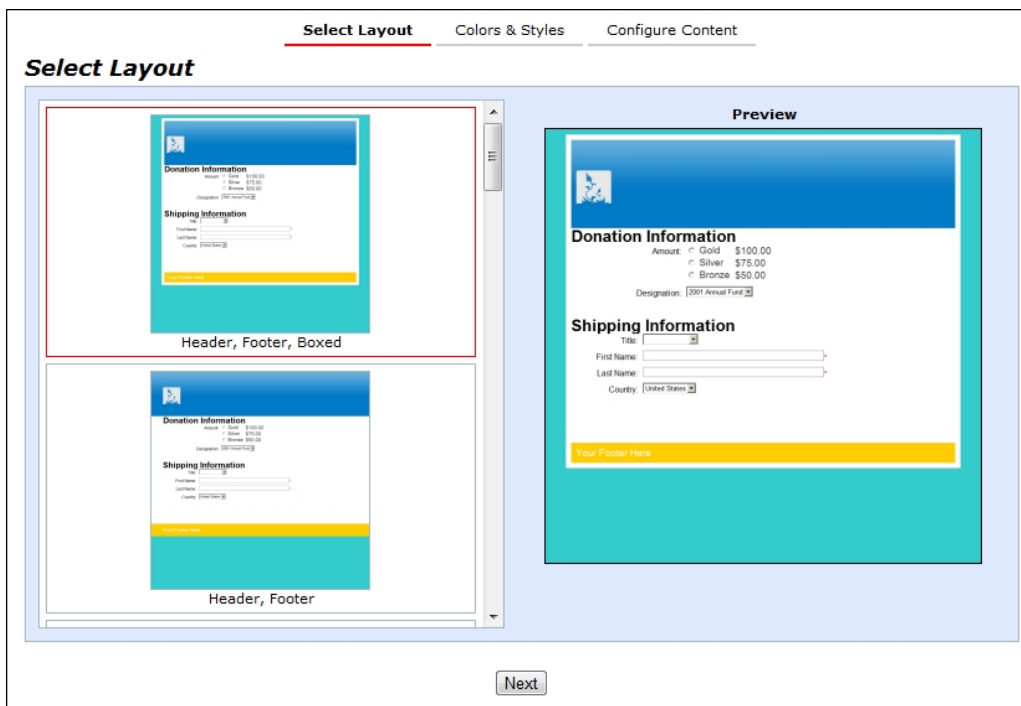
If your current layout is customized, you will need to modify the responsive layout's design to match your website. Making these updates requires significant knowledge of HTML and CSS. Contact your account manager for professional design assistance.

On the Color & Styles tab, edit the background colors and fonts. On the Configure Content tab, edit the content in the header, footer, and side columns.

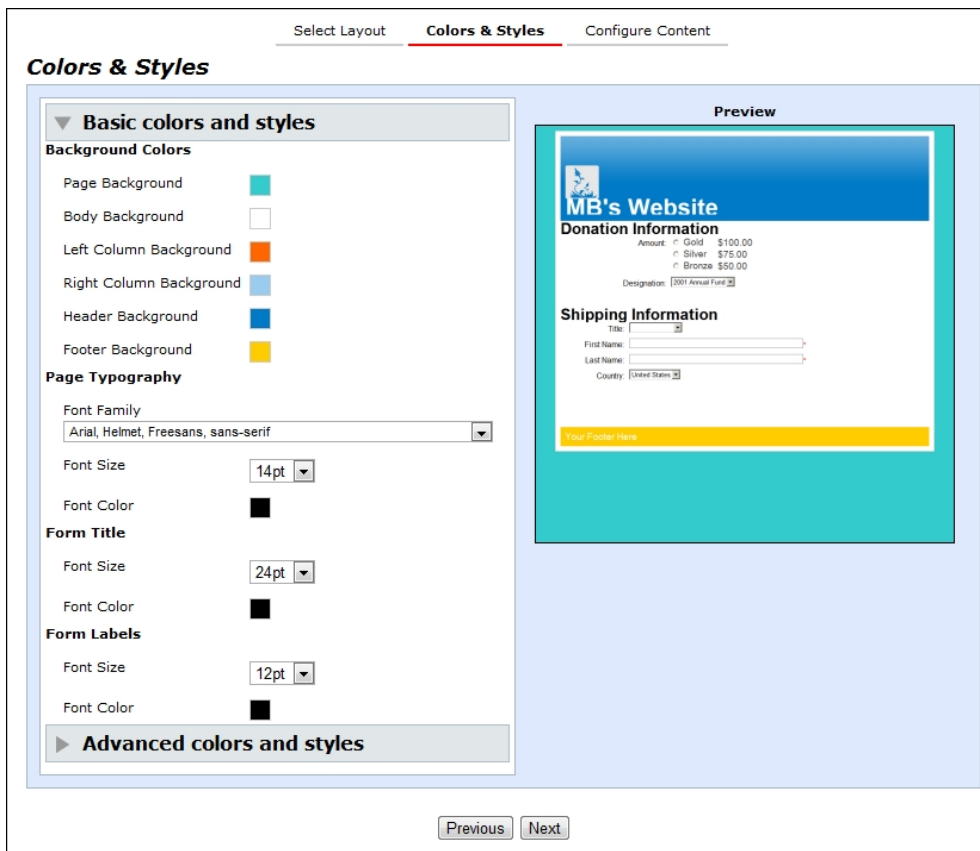
In addition to the design settings for your web pages, you also must create a shopping cart to process transactions. For information, see [Create Shopping Cart on page 55](#). You can also enter a URL for when the program needs to redirect users, design an acknowledgement message, edit your privacy policy, and edit the email preferences page. For information about these options, see [Browser Settings and Home Page URL on page 52](#), [Design Acknowledgement Email on page 38](#), [Design Privacy Policy Page on page 51](#), and [Design Email Preferences Page on page 42](#).

➤ Design the appearance and format of web pages

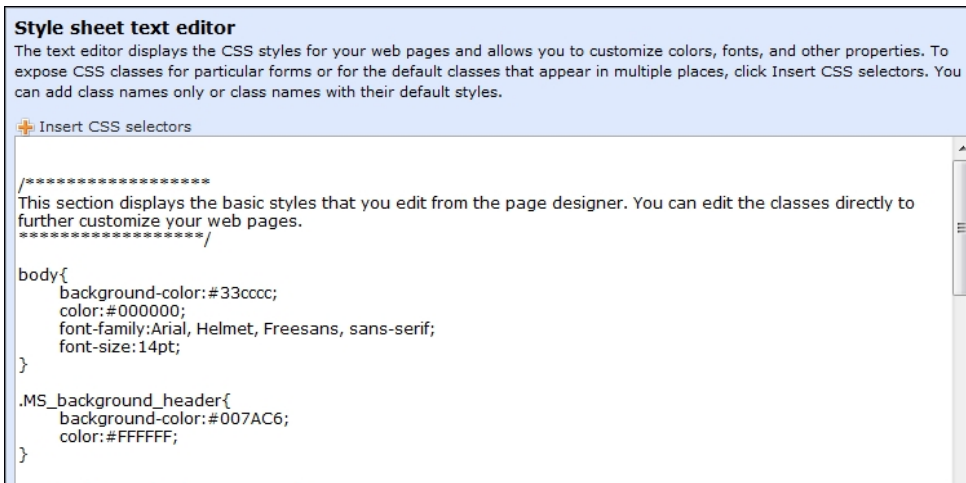
1. From *Web*, click **Page designer** under **Configuration**. The page designer appears.



2. On the Select Layout tab, select a layout for your web pages. The layout appears under **Preview**. The layout determines where items appear on your web pages. You cannot design a custom layout; you must select from the default options.
3. Click **Next**. The Color & Styles tab appears. The **Basic colors and styles** section allows you to make basic tweaks to fonts and colors, while the **Advanced colors and styles** section allows you to edit the style sheet directly.

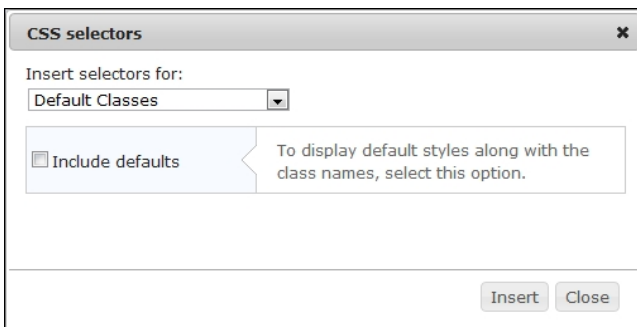


4. Under **Background Colors**, select background colors for sections of your web pages. When you click a checkbox, a color palette appears.
5. Under **Page Typography**, select the font for all text on your web pages, and select the size and color for body text.
6. Under **Form Title**, select the font size and color for section headers.
7. Under **Form Labels**, select the font size and color for field labels.
8. To use Cascading Style Sheets (CSS) to edit the web page's appearance, select **Advanced colors and styles** and click **Edit stylesheet**. The Stylesheet text editor appears.



On this screen, you can edit properties through CSS. For example, you can edit the web page's fonts, colors, backgrounds, and other properties. You can also insert HTML tags and apply styles to them.

- To load the CSS selectors that allow you to edit the appearance of forms, click **Insert CSS selectors**. The CSS Selectors screen appears. You can access this screen multiple times to add multiple selectors.



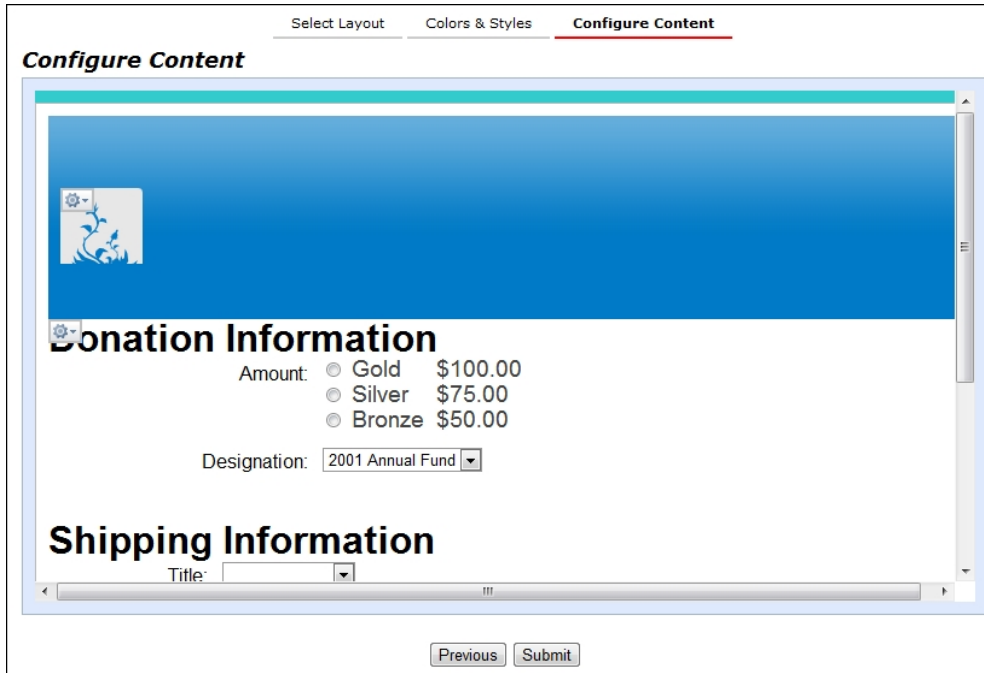
- In the **Insert selectors for** field, select the CSS selector to load in the Stylesheet text editor. To include the default styles along with class names, select **Include defaults**.
- Click **Insert**. You return to the Stylesheet text editor, and the selectors appear in a new section within the editor. Edit the styles as necessary.
- To save your edits and return to the page designer, click **Save**. Or to save your edits and keep the Stylesheet text editor open, click **Apply**.

Warning: When you save or apply changes in the Stylesheet text editor, the changes go into effect immediately. Website users who access forms can view your changes. We recommend that you check your web forms when you save or apply changes to confirm that the changes have the desired effect.

- To erase all changes to the style sheet and restore the design settings in the **Basic color and styles** section, click **Reset**.

- Click **Next**. The Configure Content tab appears. On this tab, you can edit the header, footer and columns for the web pages where your forms appear.

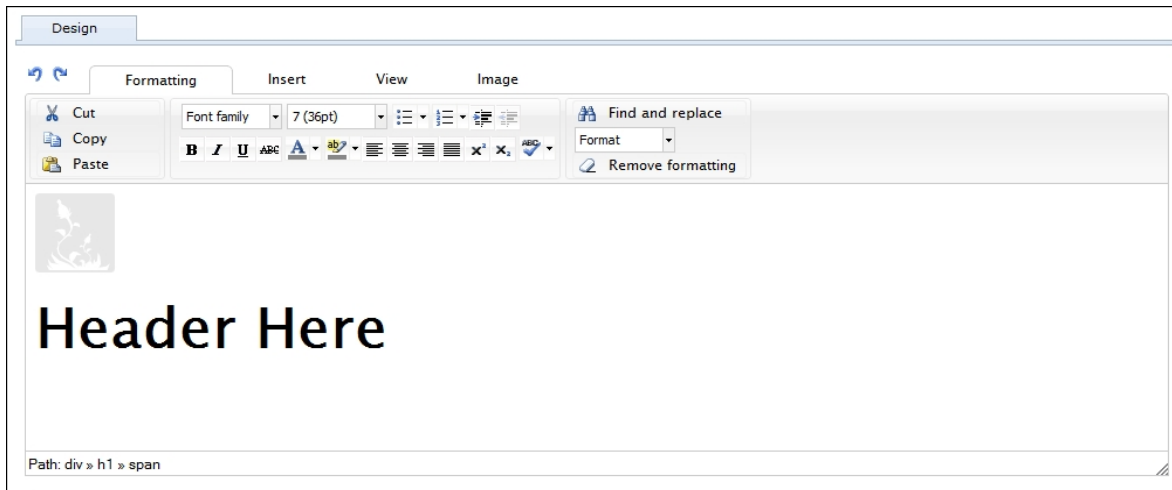
Tip: If you expect website users to print web pages, you should keep this in mind when you style headers, footers, and columns. For example, if you include a menu with many links and website users print the confirmation page, the printed output may be spread over multiple pages. On the Colors & Styles tab, you can select **Advance colors and styles** to address this scenario with a CSS media query in the style sheet.



The screenshot shows a web designer interface with three tabs: "Select Layout", "Colors & Styles", and "Configure Content". The "Configure Content" tab is active and displays a preview of a web form. The form has a blue header with a logo and the text "Donation Information". Below the header, there are three radio buttons for "Amount": "Gold \$100.00", "Silver \$75.00", and "Bronze \$50.00". Below the radio buttons, there is a "Designation:" label and a dropdown menu with "2001 Annual Fund" selected. Below the "Donation Information" section, there is a "Shipping Information" section with a "Title:" label and a dropdown menu. At the bottom of the form, there are "Previous" and "Submit" buttons.

- Click a header, footer, or side column. An HTML editor appears.

Note: You cannot edit content in the center of the page with the page designer because this section displays your web forms and payment forms. If you click this section, the screen that appears does not include an HTML editor. To edit this content, you edit the payment settings and web forms. For more information, see [Create Shopping Cart on page 55](#), [Donation Forms on page 5](#), [Program Forms on page 11](#), or [Membership Forms on page 19](#).



16. In the HTML editor, edit the content for your web pages. You can format the appearance and layout to make the pages that you create in *Web* look similar to the rest of your website. For example, you can include the same images and text in the header that you include in the header of your organization’s website.

Note: If you include links to web pages that do not secure content with Secure Sockets Layer (SSL), a warning appears when website users click the links.

For information about the buttons and menus on the HTML editor toolbar, see the *General Features Guide*.

Warning: If you use the **Edit HTML source** button to edit the HTML source code for your web forms, do not include a reference to load jQuery. Web forms already include a recent version of jQuery, so any additional reference is unnecessary and could conflict with the basic features of web forms.

Tip: If you use the **Insert image** button to upload images to match your website, remember that the program does not reflect any changes on your website. To update images on the web pages you create in *Web*, open the page designer and upload updated versions of the images.

17. After you review the format and appearance of your web pages, click **Submit**. You return to *Web*.

Note: Design settings are active as soon as you select them in the page designer, but to apply them to the secure payment page, you must click **Submit**. To help you comply with PCI DSS, the program analyzes the design settings for compliance purposes and removes content that is not PCI DSS compliant. To apply your design settings to the secure payment page, click **Submit**.

Design Privacy Policy Page

In addition to the web forms that you create in *Web*, the program also creates a page to display your organization’s privacy policy.

Note: When the program creates the web page with the privacy policy, it automatically includes a generic policy. We strongly recommend that you review this default policy to ensure that it is right

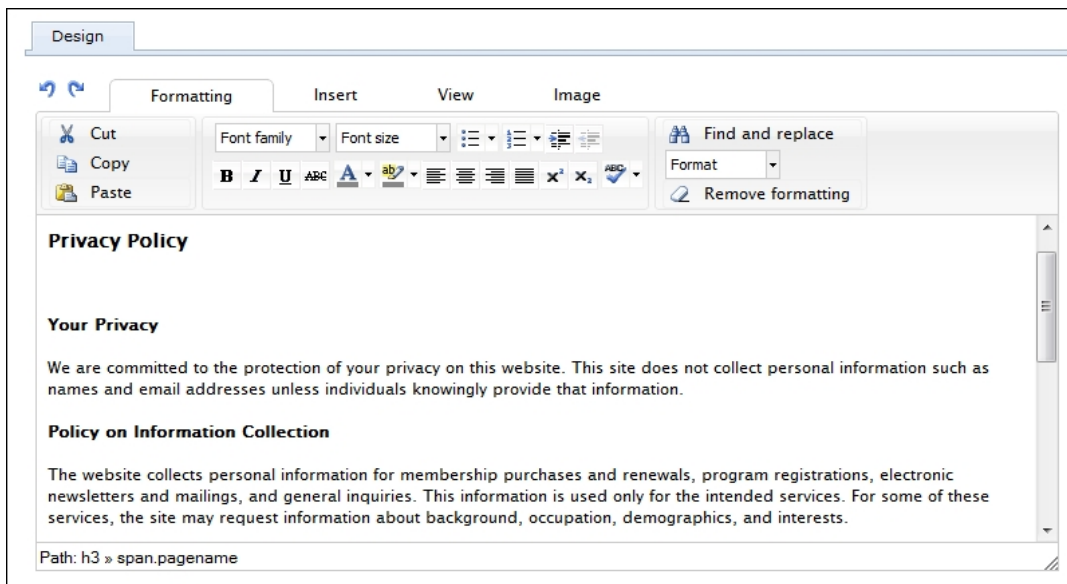
for your organization. If the generic policy does not match your organization's privacy policy, you can edit it as necessary.

To edit the privacy policy, go to *Web* and click **Privacy policy** under **Configuration**. The Privacy policy screen appears. On this screen, use the HTML editor to design and format the privacy policy that appears on the web page that the program creates.

In addition to the privacy policy, you also must configure the appearance and format of your web pages and create a shopping cart to process transactions. For information about these options, see [Design Web Pages on page 46](#) and [Create Shopping Cart on page 55](#). You can also enter a URL for when the program needs to redirect users, design an acknowledgement message, and edit the email preferences page. For information about these options, see [Browser Settings and Home Page URL on page 52](#), [Design Acknowledgement Email on page 38](#), and [Design Email Preferences Page on page 42](#).

➤ Edit the privacy policy

1. From *Web*, click **Privacy policy** under **Configuration**. The Privacy policy screen appears.



2. In the HTML editor, edit the content of the privacy policy and format the appearance and layout as necessary.

For information about the buttons and menus on the HTML editor toolbar, see the *General Features Guide*.

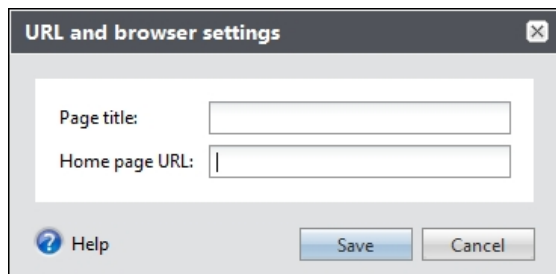
3. Click **Save**. You return to *Web*.

Browser Settings and Home Page URL

From *Web*, you can enter a label such as your organizations's name to display in the title bar of web browsers when users access your web forms.

You can also designate a home page to redirect users when necessary. For example, donation forms are only available online when designations are active and the start and end dates are current. If a designation becomes inactive or out of date, the program removes the donation form. If website users attempt to access the form, the program redirects them to the home page you designate.

To enter the title bar label and home page URL, go to *Web* and click **URL and browser settings** under **Configuration**. The URL and browser settings screen appears.



In the **Page title** field, enter the label to display in the title bar when users access your web forms.

In the **Home page URL** field, enter the URL to redirect website users to when a donation, program or membership form is not available.

In addition to the home page, you also must configure the appearance and format of your web pages and create a shopping cart to process transactions. For information about these options, see [Design Web Pages on page 46](#) and [Create Shopping Cart on page 55](#). You can also design an acknowledgement message, edit your privacy policy, and edit the email preferences page. For information about these options, see [Design Acknowledgement Email on page 38](#), [Design Privacy Policy Page on page 51](#), and [Design Email Preferences Page on page 42](#).

Design User Registration

In addition to the web forms that you create in *Web* for online transactions, you can also create a registration form that allows website users to register with your organization. When you enable registration, website users can create login credentials for your web forms and provide their contact information. The program uses email addresses as user names, and users enter their own passwords.

Login credentials for website users are associated with constituent records in your database. When registered users access web forms and log in, data from their constituent records automatically appears on the web forms.

Note: A user may receive an error message during online registration if the program is unable to create a new user account, the user cannot be linked to a constituent, or if the user name is already taken because the user attempted to register with the same email address earlier. Because these are issues that need to be fixed by your organization, the default error message the user receives is, "We cannot process your registration. For more information, please contact us by phone or email." To update this message, go to *Web* and click **User registration settings**. On the Language Tab, select "Validation" for the **Category**. In the **Text** field, edit the error message. For example, you can include a specific phone number or email address to contact for assistance. Or, you can provide more detailed instructions. For example, if the error is the user is already registered or the user name is already taken, you can tell the user to click **Sign in** to access the password reset page.

➤ Edit user registration settings

1. From *Web*, click **User registration settings** under **Configuration**. The User registration settings screen appears.
2. To allow users to create login credentials for your web forms, select **Enable registration**. The program uses email addresses as user names, and users enter their passwords. Login credentials for website users are associated with constituent records, and when users log in, data from their constituent records automatically appears on web forms.

The registration form is available at the URL in the **Registration form URL** field, and users can click **Register** on web forms to access the URL. In addition, a **Registration information** section appears in the shopping cart and allows users to register during checkout.

3. Under **Confirmation email**, select whether to send users a default confirmation email message after they register. The email thanks registrants and reminds them of their usernames.
4. Under **Required fields**, select whether to require users to enter first names, titles, or phone numbers when they register. To ensure you download complete constituent information, we recommend that you make all these fields required.
5. To rename labels, headings, and other text on the registration form, select the Language tab. You can also use this tab to enter localized text for other languages.

Item name	Item type	Default text	Text
Registration request	Message	Register to receive any member discounts or benefits.	Register to receive any member dis
Registration succeeded	Message	Thank you for registering, {0}.	Thank you for registering, {0}.

6. In the **Category** field, select the section of the registration form to edit.
7. In the **Language** field, select the language to localize.
8. The **Item name** and **Item type** columns identify items on the registration form, and the **Default text** column displays the default text. Under **Text**, rename the default labels, headings, and other text as necessary.

For example, to change the **Confirm password** field label to "Enter password again," enter the new label under **Text**. Likewise, to localize the field label, select a language in the **Language** field and enter localized text under **Text**.

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

Create Shopping Cart

Before you create web forms in *Web*, you must create a shopping cart to process transactions. The program uses the shopping cart for all the web forms you create, and it routes all transactions to the shopping cart.

To create the shopping cart, go to *Web* and select **Web payment settings** under **Configuration**. The Web payment settings screen appears. On this screen, you can:

- set how long to maintain shopping carts for anonymous users.
- enable reCAPTCHA on the **Blackbaud Checkout** payment form.
- enable a "Continue shopping" button.
- design a confirmation screen to appear after users check out.
- select required fields for when users check out.
- choose which merchant account to process credit card payments.
- select payment methods for website users.

In addition to the shopping cart, you also must configure the appearance and format of your web pages. For information, see [Design Web Pages on page 46](#). You can also enter a URL for when the program needs to redirect users, design an acknowledgement message, edit your privacy policy, and edit the email preferences page. For information about these options, see [Browser Settings and Home Page URL on page 52](#), [Design Acknowledgement Email on page 38](#), [Design Privacy Policy Page on page 51](#), and [Design Email Preferences Page on page 42](#).

Note: When a website user makes a payment on a web form without logging in, the program checks your database for records that matches the user. If the program finds a match, it associates the transaction with that record. If not, the program creates a constituent record for the website user. To determine whether a match exists, the program uses the match settings from the Constituent matching page in *Administration* unless the transaction is a special event registrations. For information about the Constituent matching page, see the *Administration Guide*. For information about matching criteria for special even registrations, see [Matching Criteria on page 57](#).

➤ Create the shopping cart

1. From *Web*, click **Web payment settings** under **Configuration**. The Web payment settings screen appears.
2. Under **General**, enter how long to maintain shopping carts for website users who are not logged in.

Warning: If you enter "0" in the **Days to keep anonymous carts** field, the program does not maintain cookies to identify website users. If users add items to shopping carts and do not check out, they cannot return to the cart later. Depending on the browser, the carts are cleared either when the browsing session times out or when users close the browser.

3. To include a **Continue shopping** button in the cart, under **Continue Shopping settings**, select **Display "Continue shopping" button** and then select the web form or URL to redirect the patron to. For example, you can redirect them to the web form page they were on before checkout or to a specific URL on your website.
4. Under **Confirmation screen**, design a confirmation screen to display after users check out.

In the HTML editor, edit the content for the confirmation and format the appearance and layout. To include personalized information, use merge fields. To clear your changes and use the program's default confirmation, click **Restore default message**.

Tip: Keep in mind that some users may want to print the confirmation page. If headers, footers, or columns on your web pages include items that print differently than they render in web browsers, this can cause problems when these users print. On the Colors & Styles tab of the page designer, you can add a CSS media query to the style sheet to address this scenario.

For information about the buttons and menus on the HTML editor toolbar, see the [General Features Guide](#).

5. Under **Required fields**, select whether to require users to enter first names, titles, or phone numbers when they check out. To ensure you download complete constituent information, we recommend that you make all these fields required.

The screenshot shows two configuration sections. The first section, titled "Required fields", has the instruction "Specify whether the following fields are required." and contains three checkboxes: "Title", "First name", and "Phone". The second section, titled "Payment methods", has the instruction "Select the payment methods to offer users when they check out." It includes a "Merchant account:" label with an asterisk, a dropdown menu currently showing "Blackbaud Merchant Services", and a callout box that says "Select the Internet merchant account to process credit card transactions." Below this is a checkbox labeled "Credit card" which is checked.

6. Under **Payment methods**, select a merchant account to process credit card transactions. For example, you can use your organization's BBMS account. The system administrator sets up merchant accounts.
7. Select the payment methods to offer to website users. By default, the shopping cart accepts credit card payments. If your organization processes credit cards through *Blackbaud Merchant Services*, you can choose to include digital wallet payment solutions to accept payments from Apple Pay, Masterpass, and Visa Checkout.

Note: To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), the shopping cart directs credit card transactions to *Blackbaud Checkout* to process payments. The secure payment form uses *Blackbaud Payment Service* to securely process biographical billing information and payment information for the shopping cart.

8. To rename labels, headings, and other text in your shopping cart, select the Language tab. You can also use this tab to enter localized text for other languages.

Design Language

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

Category: Language:

Item name	Item type	Default text	Text
Cart processing error	Message	An item in the cart caused an error and prevented checkout. To determine the cause, please click the link to the highlighted item in your cart.	<input type="text" value="An item in the cart caused an error"/>
New shipping address instructions	Message	Please enter your shipping information.	<input type="text" value="Please enter your shipping informa"/>
Shipping information header	Field label	Shipping Information	<input type="text" value="Shipping Information"/>
Shipping instructions	Message	Please select a shipping address below, or enter a new one	<input type="text" value="Please select a shipping address t"/>
Shipping instructions link	Message	here	<input type="text" value="here"/>

9. In the **Category** field, select the section of the shopping cart to edit.
10. In the **Language** field, select the language to localize.
11. The **Item name** and **Item type** columns identify items on the shopping cart, and the **Default text** column displays the default text. In the **Text** column, rename default labels, headings, and other text as necessary.

For example, to change the **Empty Cart** button label to "Clear cart," enter the new label under **Text**. Likewise, to localize the button label, select a language in the **Language** field and enter localized text under **Text**.

12. Click **Save**. You return to *Web*.

Matching Criteria

Note: The matching criteria in this section only apply to special event registrations. All other web form transactions now use match settings from the Constituent matching page in *Administration*. Special event registrants will continue to use the current criteria until the new algorithm is implemented in a future release. The one exception for special event registrations is the host (the order patron). The shopping cart determines the host, and since it uses the new matching algorithm, hosts on special event registrations are matched based on the match settings on the Constituent matching page. For information about the match settings, see the *Administration Guide*.

When website users submit payments for special events on your web forms, the program associates the transactions with constituent records. To determine whether website users match existing constituents in your database, the program uses matching criteria to compare data on web forms to the corresponding data on constituent records. If the program finds a match, it associates the record with the transaction and updates it with any new data on the payment form. Otherwise, it creates a record and associates the transaction with that new record.

Note: When the program creates a constituent, address, phone, or email address record based on a web form, it selects "Web Forms" in the **Information source** field and does not allow you to edit the selection. In queries, you can use the **Origin** and **Origin information** fields to include the information

source in query results or to filter queries based on whether records were created manually by program users or automatically based on web forms.

To determine whether a matching record exists, the program compares the following fields on the payment form with the corresponding fields on constituent records.

- **Title**
- **First Name**
- **Last Name**
- **Address**
- **City**
- **Country**
- **State**
- **Zip**
- **Email Address**
- **Phone**

For a website user to be considered a match for an existing constituent, these fields must all match exactly according to the following matching criteria.

- The program only compares website users to individual constituent records. It does not consider organizations or groups. It also does not compare website users to constituents who are inactive or deceased.
- Matching criteria is not case-sensitive, so the program treats "Smith" and "SMITH" as an exact match.
- Because the **Title**, **First Name**, and **Phone** fields are not always required fields, the program treats them as matching fields when data exists in one location but not the other. If the fields contain data on both the payment form and the constituent record, then an exact match is required.
- The program compares first names on payment forms to the **First Name**, **Nickname**, and **Alias** fields on constituent records. If an exact match exists to any of these fields, the program treats it as a match.
- The program does not consider types such as Home or Business when it compares addresses, phone numbers, and email addresses. If an address, phone number, or email address on a payment form matches any address, phone number, or email address of any type on a record, the program treats it as a match.
- For Zip codes, the program only compares the first five digits.
- For addresses, the program treats the primary street names and standard abbreviations in the U.S. Postal Service's list of street suffix abbreviations as exact matches. So if a user enters a Postal Service abbreviation but an address record includes the full name, the program treats this an exact match. For example, if a website user enters "123 Main St" but an address record uses "123 Main Street," the program treats these fields as a match. For the list of Postal Service abbreviations, go to http://pe.usps.gov/text/pub28/pub28apc_002.htm.

If the fields on a payment form and constituent record match exactly according to these matching criteria, the program associates the online transaction with the constituent record and updates the record with any new data from the payment form.

If the fields are not exact matches, the program creates a constituent record for the website user and associates the transaction with that new record.

Note: The program can only match a website user to a single record. If your database includes duplicate records and the website user matches multiple constituents, the program disregards the matches and creates a new record for the website user.