

DOCUMENTATION FOR DONOR FORCE

Version 1.12.9

INTRODUCTION

Welcome to the most extensive Joomla Donation Management available. By purchasing your Donor Force you have entered into an ever-evolving Donor management system that is both affordable and easy to use. This document covers the steps involved in installing, configuring and using Donor Force.

Setting “Options”

From the “Cpanel” Click on the “Options” button at the top right hand side of the screen just below the Joomla logo.

Configuration Tab:

Main configuration: Select whether you are going to use debit orders, recurring credit cards or just special gifts by debit order and credit card.

Admin name: The name of the person responsible for managing your donors

Admin Email: The email address of the person managing your donors.

Terms and Conditions Article ID: An article needs to be set up under Joomla Articles that contains the Terms and Conditions of your organisation and Merchant bank that will manage your account. Please place the article ID here.

Enable Bootstrap: Set to NO by default. This needs only be set to YES if your site template does not use Bootstrap.

Show Amount Raised: Set to YES this will show the amount raised for a project in the front end.

Snapscan Image on Projects: Set to YES this will show SNAPSCAN images on the front end.

Send Thank You Emails: Set to YES or NO.

Permissions Tab: You can use this to set who may have access to the component back end.

Payment Setting Tab:

Select a Currency: Set this to the currency of your country.

Select Payment Gateway: Donor Force has a number of plugins for gateway, but comes by default with PayPal and Paygate. Others can be ordered from us.

Once your settings have been set up save and close the options section and you will be back at the cPanel.

Set Up Your Projects Categories

Before adding donor's to Donor Force you will need to set up your Projects Categories.

Project Categories allow you to assign a category to a menu item and then list certain projects under this menu item only while assigning another category with its respective projects to that category.

From the cPanel, select the "Project Categories" button. This will take you into the "Project Categories Management" screen.

Click on the green "New" Button.

Give the Category a Title (Name) and click Save and Close.

Add your Projects

Your individual projects can be added and assigned to project categories or not. If you assign the projects to categories then if you select a Donor Force Category item under "Menu" in Joomla then all projects assigned to that category will be displayed on that page. If you do not select a Project Category then all projects will be listed under the Project List Item when chosen in "Menu" | Joomla.

From cPanel click on the "Projects" button This takes you to the Projects Management page.

1. Click on "New" to set up a new project.
2. If your project has a category select the category. Then give the project a name.
3. Add a short description. This displays in the project list.
4. Add a starting date and an end date. If the project does not have an end date leave this blank.
5. Add a fundraising goal amount.
6. Leave the Total Raised field blank.
7. Please select a project image for upload for the project. The size of this image needs to be 48px x 48px.
8. If you are using Snapscan for Projects please select the Snapscan image from your hard drive.
9. Once you have completed adding the information to the project click "Save and Close".

Repeat this process for each of your projects.

Setting Up Menu Items

Go to Menus and select the menu to which you would like to add your projects.

Click on New

Select "Menu Item Type"

From the pop-up Select "Project Category" to display a particular category of projects or "Projects" for a full list of projects.

Give the menu item a title and save and close the menu.

At this point in time the projects will display in the front end and the online donation system will be active.

DONORS

Donor Management Screen

This shows a list of donors, their contact details and the date of their last donation.

Donor Edit Screen

Donor Details Tab:

Lists basic donor details including whether the donor is an individual, church or business.

- Donors can also be assigned a donor level marked with a colour to distinguish them.
- If you have an exclusive donor club you can select whether the donor is part of this club or not.
- Login Details: If the donor came to you via the front end then he would already have set up his account login. If you add the donor in the back end you will need to assign the donor a login. This ties in with the Joomla User Manager.

Addresses Tab:

This tab lists the physical and postal addresses. The physical address fields are not mandatory. However, you will need to add the postal address.

Donations Tab:

Donation Subscription: This lists any debit order or recurring credit card monthly subscriptions that your donor may have set up.

Donation History: A history of all donations, whether successful or pending. There is the ability to reallocate a donation to a different project or to another donor. The “Total Donation” amount only lists successful donations.

Gifts in Kind History: Not everyone gives money. Some people will give items to an organisation. These gifts can be listed and thank you letters automatically sent.

Notes Tab: In the notes section you can list information about your donor – when last you called him etc.

E-mails Tab: If you have ACY Mailing Starter Edition installed Donor Force will list the newsletter lists so that you can assign the donor to one or more newsletters. Checking the box will subscribe the donor in ACY Mailing.

Debit Order Forms

Donations Management Screen:

Displays a list of Debit order forms. These are added by the donor in the front when selecting a project to donate funds to or by the admin in the back end.

Donation Edit:

Donor Details: Displays the donor name and the status of the debit order – active or inactive.

Banking Details: Contains all the information required for the bank in order to process a debit order. Credit card information can also be stored, however, the site needs to have SSL in order to use this feature.

Bequest Management

Bequest Management Screen:

Lists people that have indicated they would like to leave a bequest or legacy.

Bequest Edit

Lists the name of the person leaving the legacy and details about the legacy.

Donation Subscriptions

Donations Management

A List of recurring debit order and recurring debit order subscriptions added by donors in the front end or by the admin in the back end. Debit order Export and Import buttons for processing debit orders are included. When successful debit order runs are completed the results are available for processed and non-processed debit orders allowing you to see who needs to be followed up.

Add Once Off Donation

This allows you to add single donations you may have received through other means. These will be added to the donor records.

Add Gifts in Kind

Allows you to add non-financial gifts to DonorForce. A thank you letter will also be generated and sent to the donor (if this is enabled under "Options")

Select Donor: - from the list of donors in the system. If the donor does not exist you will need to add the donor first.

Select Project: Select a project to which the donor is giving. If the project does not exist you will need to create the project.

Date: The date on which the gift was given

Reference: Add if there is a specific reference you want to give.

Followed Up: has the donor been followed up and thanked? Please note that when this record is saved for the first time the donor will receive a system generated thank you letter.

Description: Describe the gift given.

Templates

This is the template for the Thank You letter that is emailed to the donor and the administrator.

Upload Logo: Upload a logo image not larger than 128px x 128px.

Header Address: Please your organisation's address here.

Body Bottom Text: This is for a small message of thanks.

Footer Slogan: For adding your organisation's slogan.

Footer Address: add your organisation's physical address here.

Reports

Search Tab:

Run reports by filtering donors, projects and gift status.

Display Reports:

Run reports on who has given and who has not over a period of time. Export the results as an Excel spread sheet.