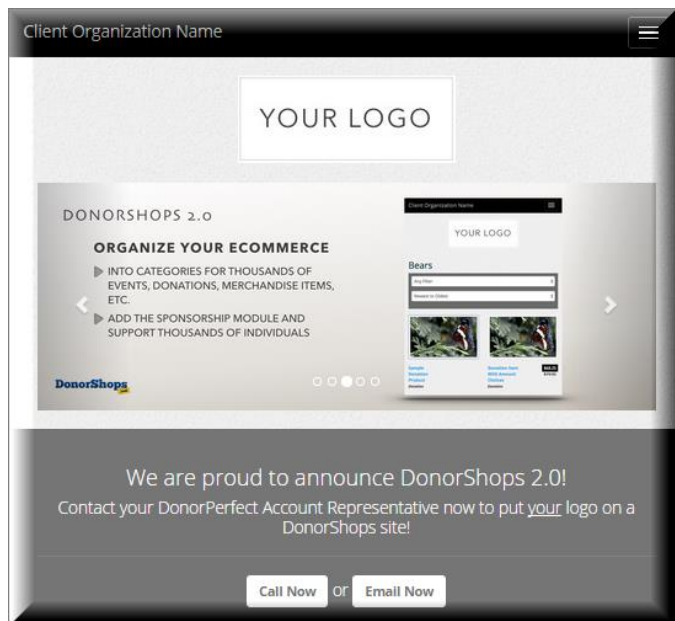


DonorShops 2.0 User Manual



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Introduction

About DonorShops.com

The DonorShops.com eCommerce platform provides complete integration with SofterWare DonorPerfect Online (DPO) using the DonorPerfect Application Programming Interface (API).

For a list of which features are included in each version of DonorShops (LITE, PRO, UNLIMITED), please see: <http://donorshops.com/pricing.php>

Audience

This User Manual supports version V.LIVE_14-06-16 of the DonorShops.com eCommerce platform and explains how to use the various features provided in this application. It has been written primarily for the users of the JPanel administration interface.

A Note to the Reader

DonorShops.com is founded on the principles of excellence and integrity. This manual is being updated to make it even more useful to you. We would be happy to receive any comments and/or suggestions you might have.

- Please submit comments, questions and suggestions via the DonorShops Service Request Portal at <http://support.donorshops.com>

Summary of changes in this version

This **major** update introduces:

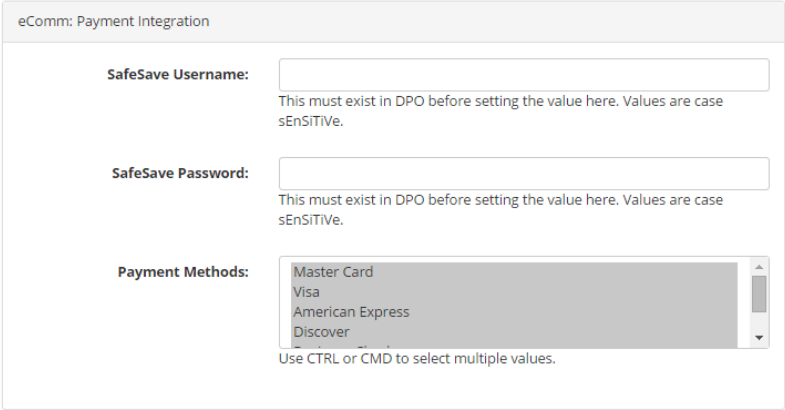
- The new DonorShops responsive administrative JPanel interface
- Provides documentation on the DonorShops Responsive Layout system including new section titled Theme Setup Options for customer theme setup/modification

Quick Start

Gather Information and Images

:

Item	Notes
<p>Organizational Logo</p>	<p>You will need a copy of your organizational logo in JPG/JPEG, AI (Adobe Illustrator), or PNG (with transparency) format for your DonorShops site.</p> <p>The preferred size for DonorShops 2.0 logo is 270 x 106</p> <p>This logo is uploaded via the DonorShops JPanel administrative interface Site Design > Customize screen</p>
<p>DonorPerfect Online Username & Password</p>	<p>Your DonorShops site connects to your DPO system with a DPO User ID and password that is entered in the JPanel administrative interface in:</p> <p>JPanel > Administration > Advanced > DonorPerfect Integration ></p> <div data-bbox="643 846 1377 1073" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>DonorPerfect Integration</p> <p>DPO Username: <input type="text"/></p> <p><small>This must exist in DPO before setting the value here. Values are case sEnSiTiVe.</small></p> <p>DPO Password: <input type="password"/></p> <p><small>This must exist in DPO before setting the value here. Values are case sEnSiTiVe.</small></p> </div>
<p>SafeSave Gateway Username & Password</p>	<p>Your DonorShops site also uses a SafeSave username and password to process financial transactions. You can use your existing SafeSave account username and password and do not need to create a separate one for DonorShops.</p> <p>PLEASE NOTE:</p> <p>If you are a new DonorPerfect Online client, we recommend you take the time now to make sure your SafeSave gateway and payment processor accounts have been submitted to DonorPerfect as these can take several weeks to process. You will need these in place in order to process financial transactions on your DonorShops site.</p> <p>The SafeSave username and password are entered in JPanel > Administration > Advanced > eComm Payment Integration ></p>

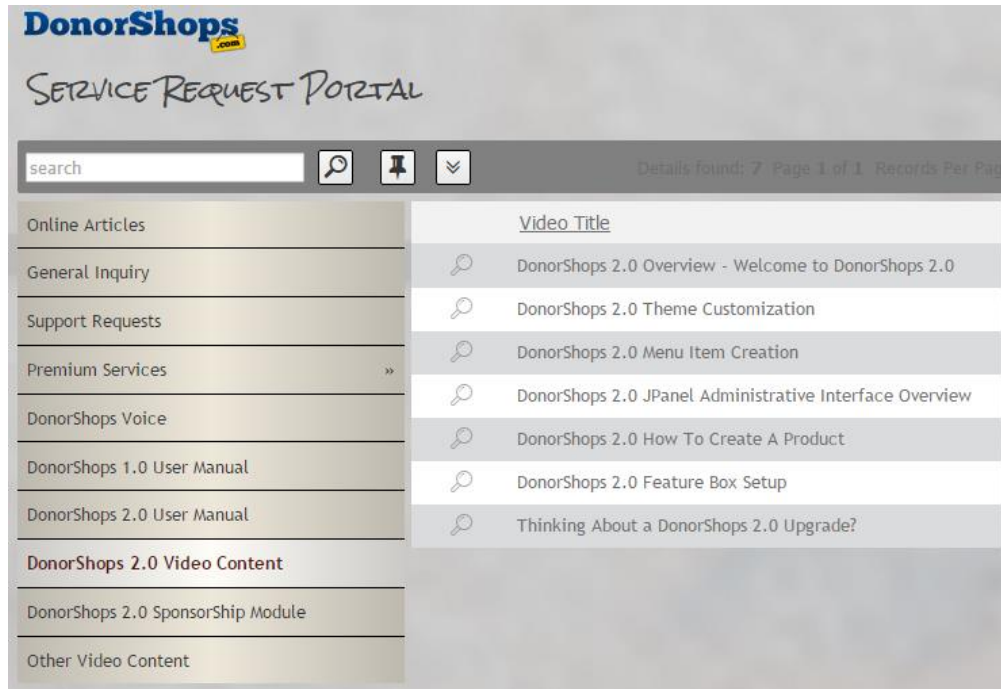
	
<p>Images</p>	<p>We strongly recommend you save your images with 70 percent quality. The image quality setting in image processing software refers to the amount of compression applied to an image (not the dpi). The image quality will appear to be the same as an uncompressed image, but the images will load much faster (up to 20 times faster) so your DonorShops site will load much more quickly for your visitors.</p>
<p>Front page banner images</p>	<p>You can have as many as you like – the system will switch between them in the order you specify.</p> <p>Previous version of DonorShops: All banner images must be 950 x 400 px JPG image files.</p> <p>DonorShops 2.0: The ideal size for images is 1170 x 430 px but you now have flexible resizing images so it is the ratio of height to width that is more significant – to avoid having some images appear stretched or compressed. You can still use all existing 950 x 400 images if you like, they will all show nicely.</p>
<p>Product images</p>	<p>You will want an image representing each product that will appear on your site. The size is flexible, but if you make the image files too small, they will tend to pixelate and not look great. You can use 400 x 600 as a rough guideline for your JPG product images, but you have a lot of flexibility here as the system will resize the images automatically.</p>
<p>DPO GL Codes, Solicitation Codes, Sub-Solicitation Codes, Campaign Codes</p>	<p>Before your site is activated, you may want to think about how you are going to use these DPO fields to help you track DonorShops orders.</p>

Resources

The primary support resources for DonorShops are

- The DonorShops User Manual
- Our Service Request Portal at <http://support.donorshops.com>.

You can access the Service Request Portal either directly via the above link or through your DonorShops JPanel interface by clicking the HELP menu item:



There are videos in the DonorShops Service Request Portal (<http://support.donorshops.com>) that will help you get started. These are under the DonorShops 2.0 Video Content heading.

Theme Your Site

Build the 'look' of your DonorShops site using the tools in your DonorShops JPanel administrative interface Site Design > Customize screen. Be sure and watch the video on theme customization.

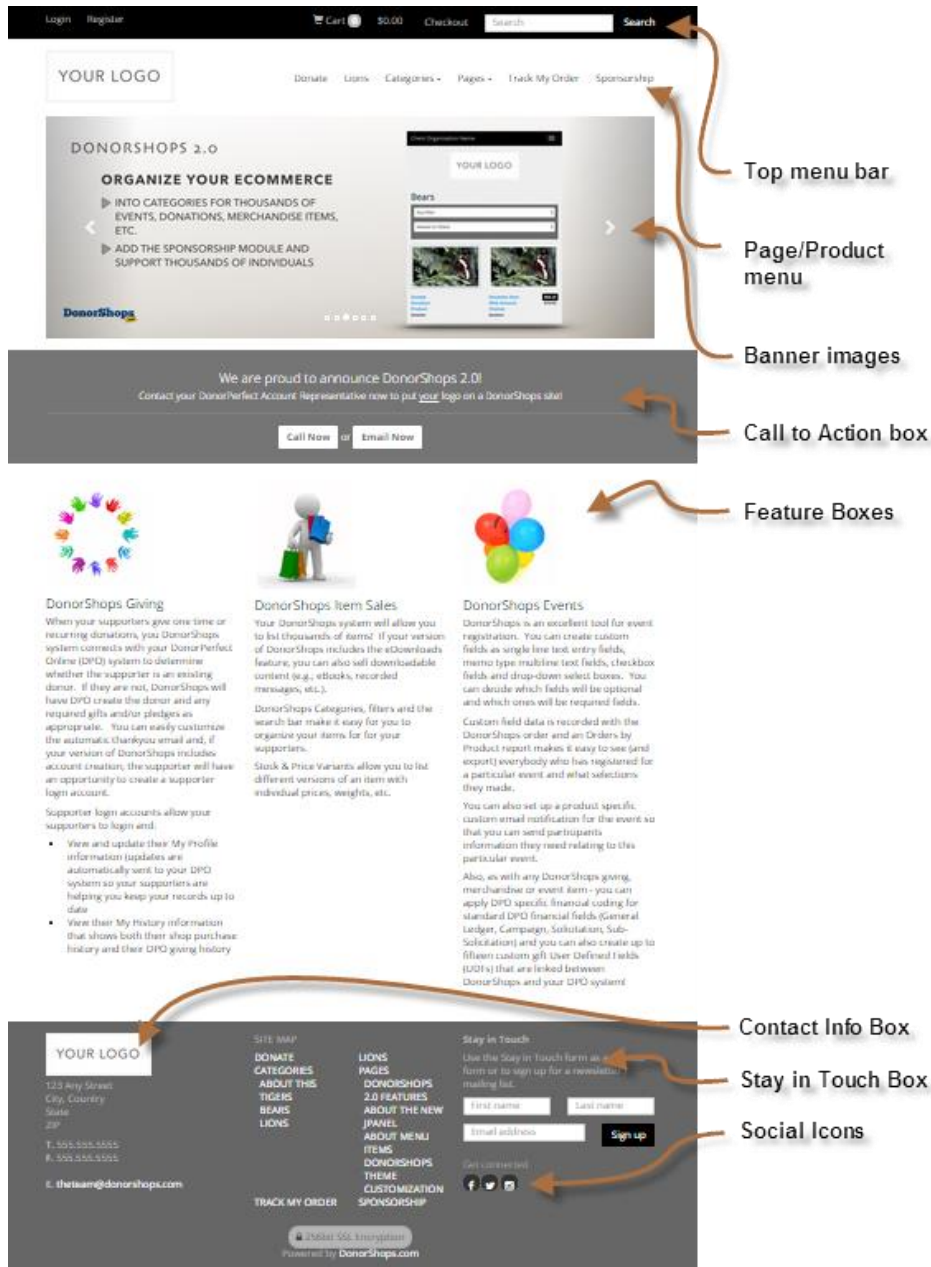
Perform Site Check

When you have set up your DonorPerfect and SafeSave gateway credentials, do the Site Check procedures contained later in this manual.

The Interface

Customer Interface

The image below shows the arrangement of elements on your DonorShops 2.0 site home page:

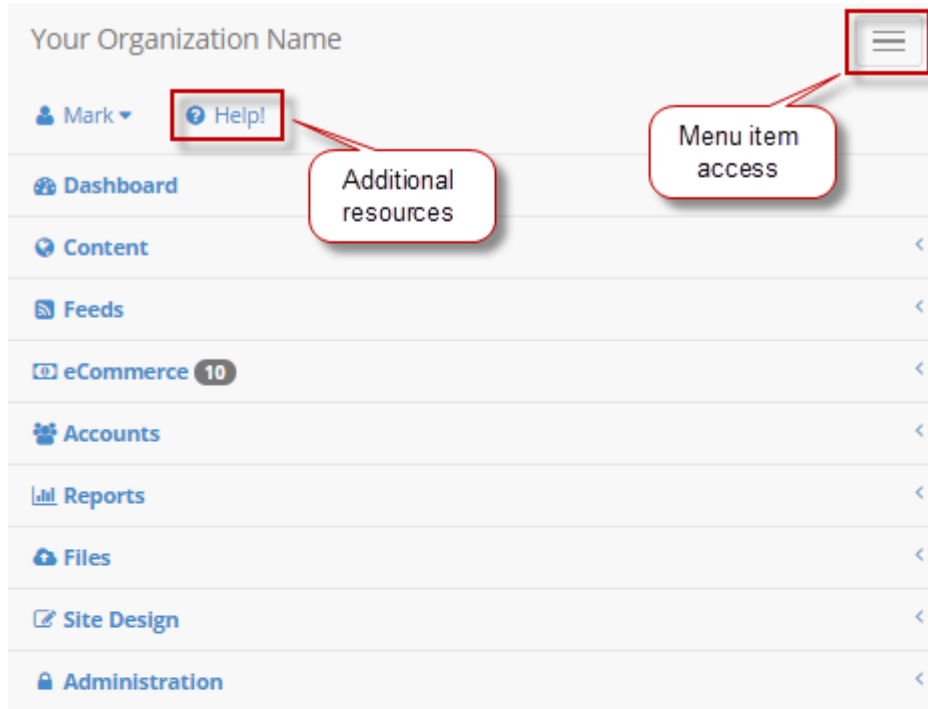


See this interface online at: <http://demo.donorshops.com>

Administrative Interface

The DonorShops responsive JPanel interface is where you will administer your DonorShops.com eCommerce platform.

This interface uses a responsive layout that will resize to facilitate use on a mobile device or tablet.



Dashboard

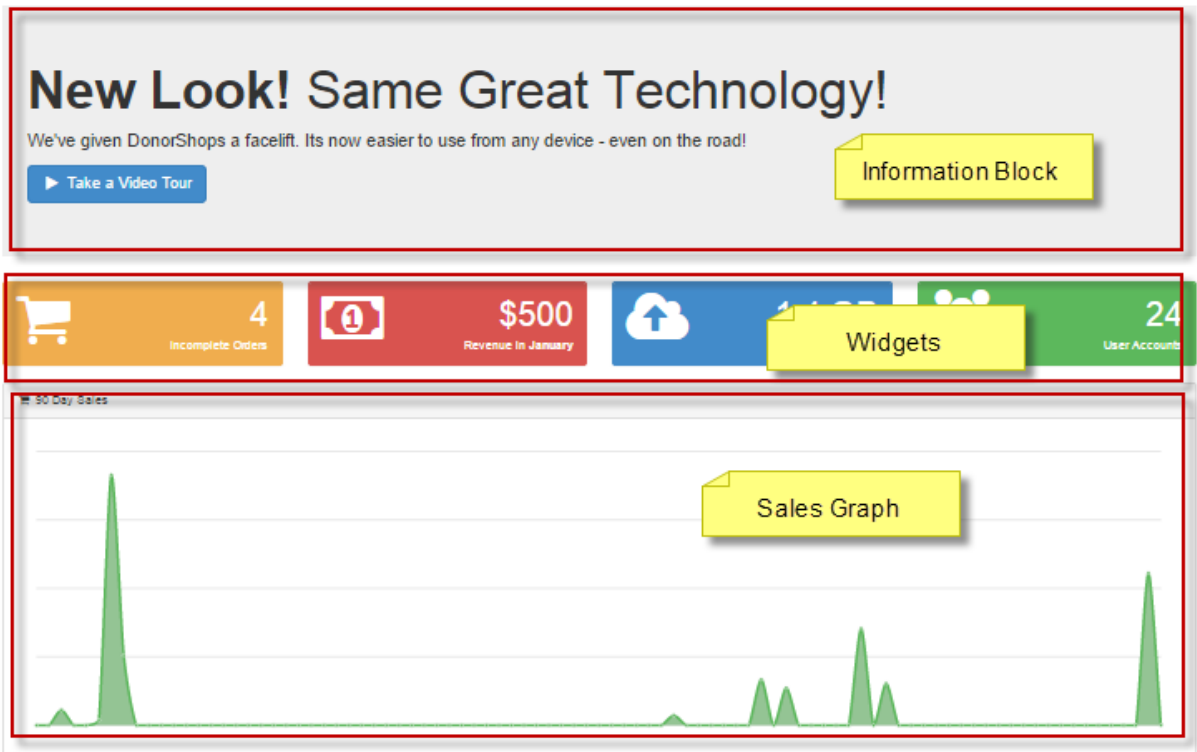
New Look! Same Great Technology!

We've given DonorShops a facelift. Your admin panel is now easier to use from any device - even on the road!

Dashboard

The DonorShops administrative interface Dashboard contains:

- An information block where we can keep you in the loop
- Widgets to give you a quick snapshot of system activity. The current set of widgets include:
 - The number of incomplete orders currently in your DonorShops system
 - The current sales total for this month
 - The total amount of cloud storage you are using
 - The number of user accounts
- A sales graph to give you an overview of recent sales activity on your DonorShops system

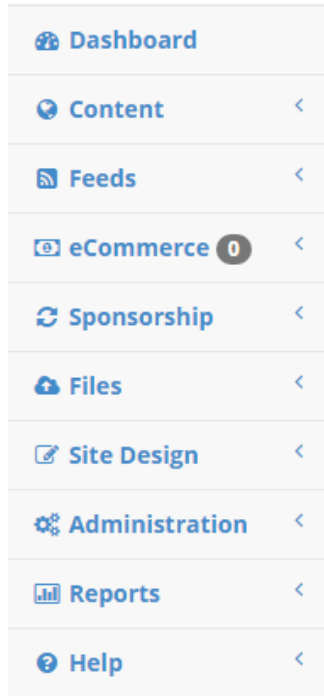


Menu Items

The actual options you see when you login, will depend on

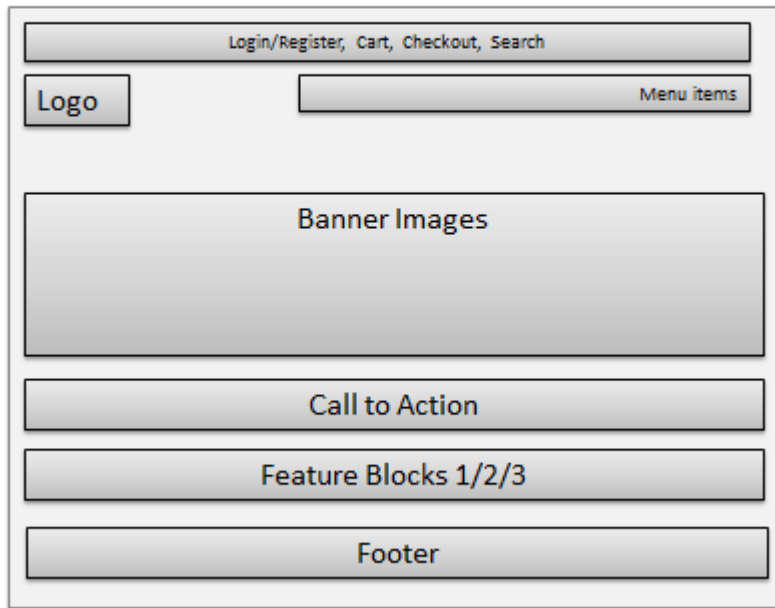
1. your permissions and
2. whether you have purchased the Sponsorship Module or not (Sponsorship menu item)

Your JPanel administrator (within your own non-profit organization) has the ability to change user account permissions. :

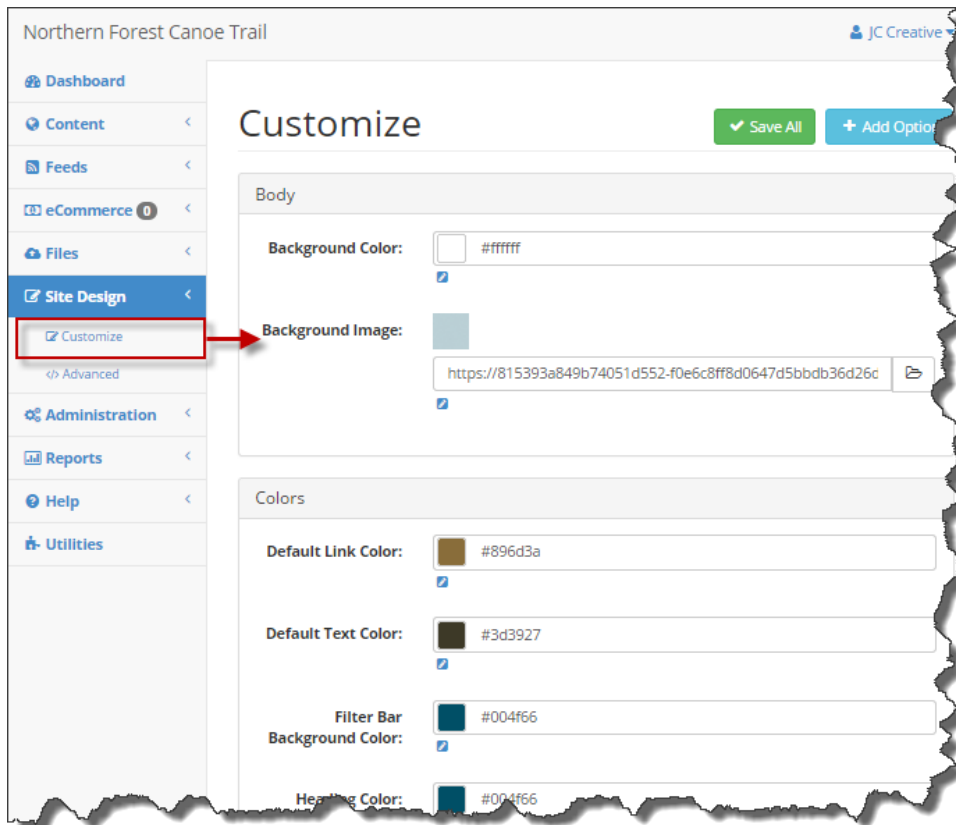


Theme Setup Options

DonorShops Responsive Layout Sites:
Standard Theming Elements & Layout



DonorShops 2.0 Introduces the Site Design > Customize screen:



This screen contains options to control:

- Colors for various aspects of your theme
- Footer element control blocks for the Contact Info and Stay In Touch blocks
- Footer social media link definition
- Header logo
- Home Page Call To Action block
- Feature Box 1, 2 and 3

Element	Notes
Header: Logo	Use this field to insert or update your organizational logo. This is the logo that appears at the top of your DonorShops pages. There is another logo that may appear in the footer but that one is controlled in the Footer Contact Info block.
Body Background	The body background color/image parameters allow you to specify either a background color or an image for the main background that will appear behind page and other content on your site. If you are applying a pattern background, consider using a small image (e.g.; 100 x 100 px). The image will automatically be tiled.
Call To Action	<p>This element, by default, contains a button which you can link to other content in your site.</p> <p>To set a link for this button:</p> <ul style="list-style-type: none"> • Select the button text • Click on the hyperlink (looks like a figure eight) button in the menu panel above • Set the URL to the desired value • Set the button text to the desired value
Feature Block 1/2/3	You can have any page content in here (e.g.; text, images, or even video (although a video may appear too small to be useful in a feature block)). The recommended dimensions are listed under each feature block but you can experiment with different image sizes to get it looking the way you want it to!
Contact Info	Add in any text images (typically your logo, address, email and phone information. This will appear at the left side of your DonorShops footer.
Stay In Touch	This block allows you to add text that will appear above the first name, last name and email fields. When a client enters their name and email and clicks the Sign Up button, the info is entered into DonorShops as a DonorShops account with no login privileges. The Export Emails button in the Accounts window allows you to generate a list of all accounts, including the ones entered via the Stay In Touch tool.

Advanced Theme Customization

If you would like more advanced theme customization, this is absolutely possible!

[Click here to request theme customization services](#)

Site Configuration Tips

We've included this section to give you some ideas on how to set up your DonorShops site so that it will really be irresistible to your supporters!

Item Descriptions and Blogging

When we designed DonorShops, our philosophy was to be the polar opposite to a virtual cash register. We wanted to create a tool that would allow you to **engage your supporters in your mission, your values and your activities**.

When you are building your product descriptions, you have the opportunity to do exactly this by

- Giving your DonorShops site visitors details about the work you are doing
- Show them pictures and video from the location(s) where you are working
- Have your staff talk about the people you are helping
- Show them the field where you are going to build the well
- Tell them when the truck is leaving with supplies

... you get the idea.

In the past, people would support organizations because they believed in the overall values and work of your organization. This is true less and less. People these days want specifics – they will rally to a cause that is going on right now.

Give them updates on your progress. The DonorShops blogging feature is a great way to give them day-by-day updates!

Images

On the front page of your DonorShops site, you will have one or more **banner images**:

Your **banner images** can be used to promote your organization but can ALSO be used to promote your product/donation/event items. Each banner image can be linked to a Page, Blog or Product item in your DonorShops site. Also, you can have as many banner images as you like, so make full use of this capability to advertise your projects and products!

REGARDING ALL IMAGES:

- **Banner Images:** Make sure you follow the directions for image size and type listed in the Planning Ahead section of this document
- **For ALL images:** We recommend that when you are saving images for use in DonorShops that you adjust the Quality setting to 70 percent. This would, for example, reduce the file size of a banner image from 1MB down to 50kb (1/20th the size of the original) without making your images appear to have reduced quality. This file size reduction has direct and significant impact on how long it takes your DonorShops site to load – especially for your supporters with lower bandwidth connections.

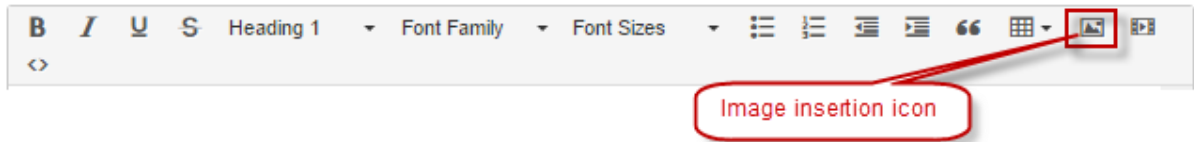
Inserting Images into Page Content

For banner images and product images, there are Choose File buttons for inserting and uploading

these.

Images for insertion into page or product content fields are stored in the Image Library (under the Files menu item) so that they can be stored in one place and re-used in multiple pages and/or products.

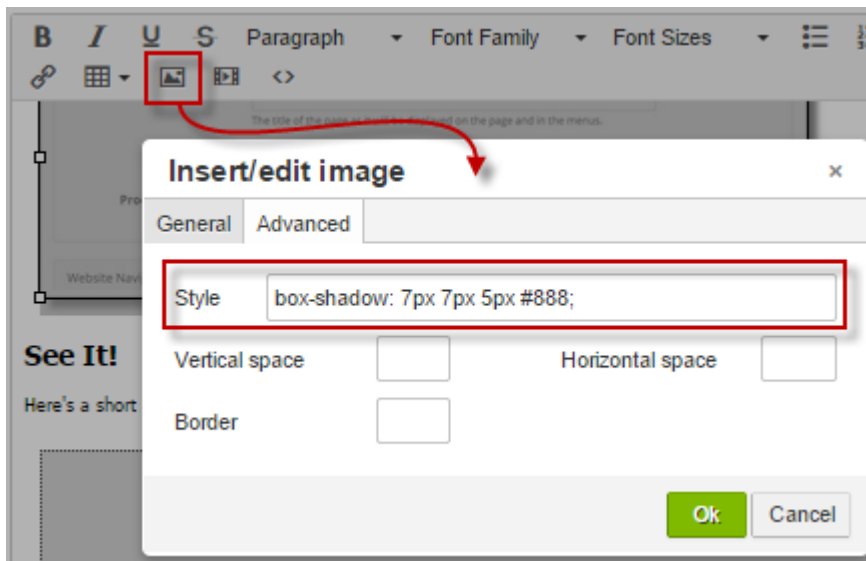
To insert an image from the Image Library into a page or product content window, use the image insertion icon:



Advanced Image Styling:

You can apply some cool styling to your images using the Advanced Tab > Style box. This box allows you to enter image related CSS such as:

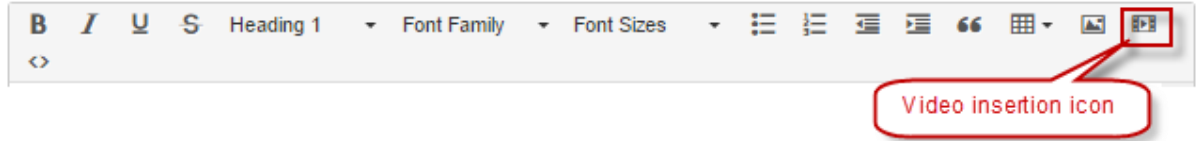
- box-shadow: 7px 7px 5px #888
 - as shown in the example below, places a drop shadow around the image
- float: left;
 - floats the image to the left so text can appear to the right of it
- float: right
 - floats the image to the right so text can appear to the left of it



There's lots of information on the web on other types of CSS styling you can apply to images.

Inserting Video into Page Content

Video content would be stored externally (e.g.; on YouTube or Vimeo or whatever) and you would add these to your page or product content window using the video insertion icon:



This will open the video insertion window and allow you in insert either a video URL link or the embed code:

A screenshot of the 'Insert/edit video' dialog box. The dialog has a title bar with 'Insert/edit video' and a close button 'x'. There are two tabs: 'General' and 'Embed'. The 'Embed' tab is selected. Under the 'Embed' tab, there are three input fields: 'Source', 'Alternative source', and 'Poster'. Each field has a small video icon to its right. Below these fields is a 'Dimensions' section with two input boxes separated by an 'x' and a checked 'Constrain proportions' checkbox. At the bottom of the dialog are two buttons: 'Ok' (green) and 'Cancel' (grey).

Featured Items & New Arrivals

Don't let your site get 'stale'. Changing Featured & New Items is as easy as clicking a check box in a Product Detail screen. Change these items frequently.

Banner Images

The banner images that appear on your DonorShops.com eCommerce platform home page are controlled under Home Page Banners in the main menu:

A screenshot of the 'Home Page Banners' management interface. At the top, there are two buttons: '+ Add Post' and 'Feed Settings'. Below this, there are two banner cards. Each card has a small image on the left and text on the right. The first card is titled 'DonorShops Web' and has a URL 'http://devweb.donorshops.com/'. The second card is titled 'DonorShops Web 2' and has a URL 'http://devweb.donorshops.com/'. Each card has a set of control buttons: 'Edit', 'Move', and 'Delete'.

When you edit an existing banner or add a new one, you will see these options:

View/Edit Post

Feed


Date

End/Expiry Date

Headline

Summary

Sequence

File  [Currently: DS WEB Banner Images 003.jpg](#)
Upload: No file chosen

Link
This is the link that the user will go when they click on the image.

Tags
Example: 'Conference', or 'Conference, Retreat, Speaking'

Status

Notes:

- **Date and End/Expiry Date fields:** You can use these to set a Date when the banner image will automatically appear on your site. If you like, you can also set an End/Expiry date when it will automatically be hidden.
- **Headline & Summary:** These fields are for your reference and are not displayed on the site.
- **Sequence:** The number here controls the order of appearance when you have multiple banner images
- **File:** Upload your image here
- **Link:** If you want to link to something when they click here
- **Status:** Online to appear in the set of banners on the web page, Offline to disable this banner image. For banner images with Date and End/Expiry Date field values, set the Status to Online.

Filter Values

DonorShops has a filter field that may be called Project or Project Area or Author or Artist or whatever you like. You can change the name of this field in Advanced Settings Using the **Product Filter Label** field.

This field is used to allow your supporters to narrow down the list of items displayed within the selected Category. A category will only display a filter choice if there are one or more items belonging to that filter value in the selected category.

If you can come up with an even distribution of your product, donation items and event items; it will make it easier for your supporters to browse through your offerings.

Blog

You can create a blog in your DonorShops site! This is a great way to keep people up to date with what's going on in your organization. The key is to provide regular (**frequent**) updates to your blog.

Key Points:

- The blog itself is a Feed.
- You can display the blog feed on a content page by creating (or opening if it already exists) the content page then using a shortcode to display the feed:
- Format: `[display_feed name='feedname']`
- Example: `[display_feed name='Hammy Hamster Blog']`
- **IMPORTANT:** You must use single quotes to wrap the the name of the feed. If it isn't working, check and make sure you haven't used smartquotes by mistake. Some word processors convert quote symbols to smartquotes which may look the same but are different symbols that word processors can use to decide whether to insert opening quotes or closing quotes.

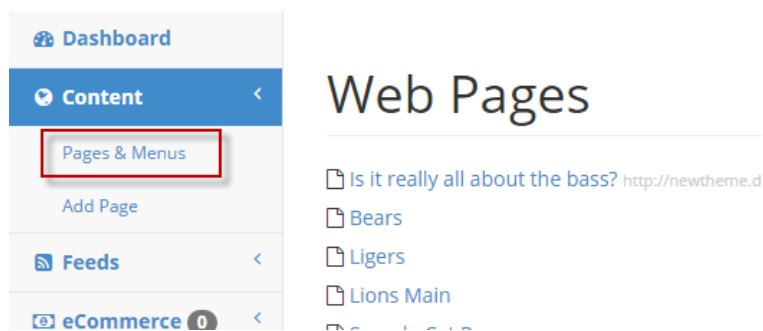
Pages & Menus

DonorShops is a content management system (CMS) that allows you to create content pages in your site. It is this feature that makes it possible for clients to use their DonorShops site as their main website!

NOTE: There is one system page in your DonorShops Site called 'Home'. This page is used to display your DonorShops site homepage. Do not make any changes to this page without checking with DonorShops first.

ALSO: Do not place content pages under system pages using the Menu Placement drop-down.

Adding and updating pages is done through the JPanel Administrative Interface: Content > Pages & Menus:



In this screen you will see a list of any existing pages and also a menu item at the top to **Add Page/Link**. This button allows you to add either content pages or menu items to your site.

Add Web Page Save

General

Page Name
The title of the page as it will be displayed on the page and in the menus.

Content Type

Website Navigation

Visibility

Menu Placement
The menu item this page belongs to in the menus.

Sequence
The order in which this page will be displayed in the menus.

New Window
Depending on the browser, this page may open in a new tab, not a new window.

NOTE: Some of these fields will not show until you have saved the new Page/Menu item:

- Page Name:** Give the page a name. If you make the page 'visible in website navigation' this is the name that will appear as the menu item name
- Content Type:** Choose **Normal** Content for a page you are going to write content into
- Choose **Product Category** to create a category menu item. When you choose this option, a Product Category selector will appear. For clarity, you would normally make the Page Name value the same as the category name.
- Choose **Menu Item Only** if you are only going to use this as a link to an internal or external web page. Choose this value for any top level menu items that will have sub-menu items under it.
- Choose **Advanced Content** if you are going to insert <IFRAME> content into the page. You can still have other normal html content in these pages as well.
- Status:** Online / Offline - you can keep pages offline until you are ready to publish them
- Visibility:** This option controls whether the page will show in the menu system. You could, for example, have a page that is online but Hidden in Website Navigation. This would allow you to access it if you sent the link to somebody, but it would not be accessible via navigation through the menu system.
- Menu Placement:** If you have DonorShops PRO or UNLIMITED, you can either place menu items as main menu links (Main Link) or have them under another menu item – you will see a list under this drop-down of your existing menu items.
- If you have DonorShops LITE, select Main Link
- Sequence:** Menu items are sequenced from 1 up – left to right – higher numbered menu items appear to the right of lower numbered menu items
- New Window:** You can either open a menu item in the DonorShops window (recommended for pages that you create within DonorShops OR 'Open link in a new browser window' which is recommended for links to external websites
- Page URL:** Depending on the page type, it may auto-assign a page URL if not, then read the small grey text just below the box to see what you need to put in here.
- Layout:** **Select 'Content'** – if you do not do this, the page will show on a white background – select 'Content' to set the page within DonorShops

SEARCH ENGINE OPTIMIZATION:

- Browser Title:** This will appear in the browser window tab
- Meta Description:** Description used by search engines to index this page.
- Meta Keywords:** List of any keywords to further help search engines index this page.

Previous Versions: Allows you to return to a previously published version of this web page.

Creating Menu Items

In DonorShops 2.0, we have amalgamated the two separate menu systems (page menu, category menu) into a single menu structure to give you more flexibility!

To create a:

Page	Set the content type to Normal Content (HTML)
Category Menu Item	Set the content type to Product Category. This will reveal a category selection drop-down menu where you can select the desired category.
Top Level Menu item that will have sub menu items	Set the content type to Menu Item Only
Page with custom code	Set the content type to Advanced Content

If, for example, you want to have a Merchandise category with sub-categories for Books and Clothing, create a top level menu item for Merchandise as Menu Item Only. Then create Category Menu Items for All Merchandise (linked to your Merchandise category), Books (linked to your Books category) and Clothing (linked to your Clothing category).

General

Page Name:
The title of the page as it will be displayed on the page and in the menus.

Content Type:

Product Category:

Status:

System Pages

🔒 System Pages

- [Home](http://donorshops.funkjedi.com/index.php) http://donorshops.funkjedi.com/index.php
- [Login](http://donorshops.funkjedi.com/login.php) http://donorshops.funkjedi.com/login.php
- [My Payment Methods](#)
- [Edit Payment Method](#)
- [Forgot Your Password](http://donorshops.funkjedi.com/forgot-your-password.php) http://donorshops.funkjedi.com/forgot-your-password.php
- [My Profile](http://donorshops.funkjedi.com/my-profile.php) http://donorshops.funkjedi.com/my-profile.php
- [My History](http://donorshops.funkjedi.com/my-history.php) http://donorshops.funkjedi.com/my-history.php
- [Sign-Up](http://donorshops.funkjedi.com/signup.php) http://donorshops.funkjedi.com/signup.php

Under Content : **Pages & Menus**, you will see a category of pages called System Pages. These are pages that

- have special functions – e.g.; the My Profile page contains a special code called

[display_profile_form] that causes the member information display/update fields to be displayed.

- Please be careful when editing system pages so you don't accidentally delete special functions.
- Cannot be deleted

System Page Name	Notes
Home	DO NOT Modify the HOME page without checking with DonorShops first. Making changes to this page can impact how your site is displayed
Register	This page allows site visitors to register for an account on your DonorShops site. When a person registers, DonorShops will check to see if the person already exists in your DPO system. If, based on the email, name and address information they provide, they do not exist then DonorShops will ask DPO to create a new Donor. The resulting Donor ID number will be associated with the new account.
Login	Registered DonorShops account holders will use this page to log into your DonorShops site.
My Profile	Logged in account holders will use this page to view and update their account information. Updates will automatically be sent to your DPO system.
My History	Logged in account holders can view both their shop giving history and also their DPO giving history here.
Forgot Your Password	Valid account holders can use this page to request a password reset email.

Products

The main products screen lists all available products. Any donation item, event and items for sale are all considered to be Products to DonorShops.

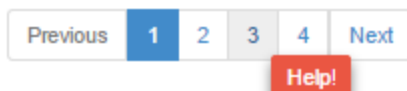
Use this screen to:

- Add and update products
- View and update product images
- Edit product descriptions, prices, etc.

Product List Screen

The screenshot shows the 'Products' administrative interface. At the top right is a '+ Add Product' button. Below it is a 'Filter Options' section with 'Category:' dropdowns set to 'Any', and input fields for 'Code' and 'Name'. A 'Filter List' button and a 'Clear Filter' button are located below the filters. A callout points to the 'Filter List' button with the text: 'If you change filter options, don't forget to click the Filter List button to invoke the filtering.' Below the filters is a 'records per page' dropdown set to '50' and a 'Quick Search:' input field. A callout points to this dropdown with the text: 'Change number of records displayed per page'. The main area is a table with columns for 'Cod', 'Name', and 'Filter'. A callout points to the 'Edit Product' icon in the first row with the text: 'Edit Product'. Another callout points to the camera icon in the first row with the text: 'View product image'. The table contains several rows of product data.

Note that the new DonorShops JPanel administrative interface now supports paging on some list pages and also provides inline help tips:



Product Details Screen

The DonorShops Jpanel Product Details screen has also received a significant 'make-over'. Tabs have been added to organize the content into sections for greater clarity:

- General
- Stock & Price
- Custom Fields
- Page Content

- Taxes
- DPO Integration

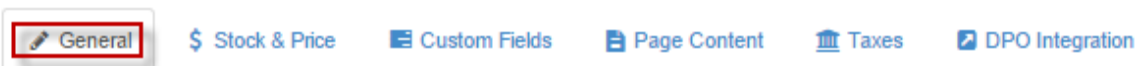
NOTE: Not all fields will be visible in all versions of DonorShops. For example, if you have DonorShops LITE, you will not see product download fields.

Also, a Sales Report button allows you to see your sales for this item by taking you to the Orders By Product screen for the viewed product:

Order#	Order Date	Option	Qty	Billed To
BB1FAB4366	Jun 10, 2011 10:37am	[None]	1	Mark Warren
012FA2C83A	Jun 10, 2011 10:54am	[None]	1	Mark Warren
311BE2C4A1	Jun 10, 2011 11:01am	[None]	1	Mark Warren
509337D83B	Jun 10, 2011 01:07pm	[None]	1	Mark Warren

And... if you hold your mouse over any points in the graph, it will give you date and sales numbers for that day.

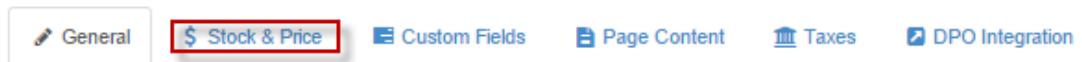
Tabs: General



Field Name	Comments
Code (SKU)	<p>DonorShops automatically assigns a value to these that you can change if you like.</p> <p>SKU values may contain letters and numbers but must NOT contain any spaces or special characters – e.g.; !@#\$\$%^&*().</p> <p>Underscore (_) and dash (-) are valid characters.</p> <p>If you are going to change the default SKU values, please keep in mind that SKU values must be UNIQUE. You may not have two products with the identical SKU code because the SKU forms part of the web link address used to access the product page.</p>
Name	The name of the product that your site visitor will see and can search for
Filter value (or other filter name such as Author/Project/etc.)	<p>The field under the Name field corresponds to the filter box in the category window.</p> <p>Your site may call this 'Filter', 'Author', 'Project Area (like in the above example) or some other name. The label for this field depends on what you selected for your site in the Advanced Settings Product Filter Label field.</p> <p>When the site visitor is looking at the product items in a particular category, they can select this filter to narrow down the list of products within the category</p>
Image	At this time, only JPG, GIF and PNG images are supported. These images will automatically be resized by DonorShops, but if you use images that are too small they will look pixilated and if you use very large images they will take a very long time to load. Please respect the patience of your site visitors by saving all product images as 70 % image quality. They will look the same but load much faster
Payment Type	Select 'Add to Cart' for non- recurring items or Recurring Payment for pledge items. Please note that while DonorShops creates the initial pledge, DPO runs subsequent recurring payments using the DPO EFT Transactions function. If you select 'Recurring', an additional drop-down field will appear to let you select the desired payment interval.
Price Type	Choose Fixed Price when you want to pre-set the price. Use Let Customer Choose when you want to allow the site visitor to fill in an amount.
Goal Amount	<p>Allows you to set a fundraising goal for a particular product and display progress towards that goal. See separate subheading on this topic for more information.</p> <p>For products where <u>no</u> goal amount is to be set, leave this at the default (0)</p>

	value.
Categories	Check any categories you want this item to appear in.
'Add to' Label	You can change the value of the 'Add to Cart' button with this field. Examples: 'Register Now', 'Give Now', etc.
Active Date	You can use these two fields to have DonorShops display the product starting on a specific date and, if you like, have it hide the product as of the Ending date. The 'Show product on website' checkbox must also be selected (checked) for the product to display.
Out of Stock	Controls what DonorShops will do when the particular variant of the product reaches zero.
Limit # of Sales	Provides a product level override for the Stock & Price variant quantity levels when used in conjunction with the Out of Stock option
URL	This displays the URL associated with the product. You can, for example, copy this URL value for use in banner image links.
Email Notify	You can enter one or more comma separated email addresses in this field to cause an automatic notification to be sent to the person/people when this particular item is purchased. An example would be a registration item for a particular event where you wanted the event coordinator to be notified about registrations for this particular event.
Duplicate This Product	<p>You can duplicate products for situations where you want to create a new item based on an existing one! This can be a big time saver especially for product/event/donation items with multiple Stock & Price variations and Custom Fields.</p> <p>Please Note: The product duplication function does not currently duplicate the Options for select box fields. You will need to create these manually.</p> <p>When you duplicate a product, you will also want to change the product name and check all other fields to make sure that the new product has all the desired values</p>

Tabs: Stock & Price



Applies to: DonorShops PRO and DonorShops UNLIMITED

DonorShops allows you to specify multiple Variants for your products and each Variant can have a different price. You can also track Inventory Stock levels for each product and each variant of each product.

Please Note: You must set the Is Default Variant option to Yes for one Stock & Price variant so that DonorShops will show the price of the variant in the product category list display page(s).

If you are a DonorShops Unlimited customer, you will also see a Membership field in each product variant. If this product is NOT selling a membership level, leave this field set to [none]

for each variant.

Here are some examples:

- Event seating in Section A, Section B, Section C where the seats in each section have different prices
- Golf shirts in different sizes or colors – you can charge more for the XL and XXL if you like
- An event where you offer Friday Only, Saturday Only, Sunday Only or Premier Pass to all sessions
- Theatre productions where you offer tickets for different nights

Field Name	Comments
Requires Shipping	Set to Yes if this product requires shipping. If one or more items in the cart require shipping, the shipping information panel will be displayed and the appropriate shipping charges will be applied (see section on Shipping).
Weight	If you have Courier Based Shipping set up on your system, you <u>must</u> apply a non-zero shipping weight to <u>all</u> product variants for all products where the above Requires Shipping option is set to Yes.
Is Default Variant	Set to Yes if the is the default variant to be initially displayed in the drop-down. IMPORTANT: You must set the Is Default Variant option to Yes for one Stock & Price variant so that DonorShops will show the price of the variant in the product category list display page(s).
Quantity Left	This is the field where you do a manual inventory adjustment.
Restock At	This field sets the inventory level where the product variant will be highlighted in the Product Stock Levels report Remaining column.
Link To Membership	If this product variant includes the purchase of a DPO membership level, use this field to set the appropriate membership level as defined in your DonorShops > eCommerce > Membership. See the Membership section in this document for more information.
Show File Download Options	Reveals additional file download options to be used if this product includes the sale of downloadable content
File for Download	This field allows you to select a file from the Download Library
File Expires After	This field defines the amount of time that the link in the Order: eDownload Links system email will remain valid.

Tabs: Custom Fields



Applies to: DonorShops PRO and DonorShops UNLIMITED

Custom Fields allow you to have the purchaser fill in additional information you want to capture when they make a purchase. These fields can be either optional or required. Here are some examples:

- Student names
- Parental contact information
- How did you hear about us?
- Special message to the recipient of a gift purchase
- Tribute names (Unmanaged)

- Allergies or special meal requirements

Custom Field labels and values are stored with the DonorShops orders and can be viewed in the Order screen as well as in the Track My Order screen viewed by the customer.

Field Name	Comments
Sequence	This number controls the field display sequence. It is ALSO used in Email Notifications Custom Field Notifications merge tags. If, for example, you wanted to include the value from a custom field with sequence '2' in an email notification, this field would be referenced by the merge tag code: <code>[[custom_field_02]]</code>
Name	The field label value
Type of Field	See subsection below for more information on Custom Field Type values
Is Required	If a field is set as a required field, the site visitor must complete the field before being allowed to add the item to the cart. If a checkbox field is set as required, the field <u>must</u> be checked before the site visitor can add the item to the cart. You could, for example, use this to confirm that a site visitor has agreed to certain conditions before being allowed to proceed.
Map to DPO UDF	If you have custom gift User Defined Fields (UDFs) mapped to your DonorShops site, you will be able to link a custom field value to a custom gift UDF here. See the section on custom gift UDFs for more information.

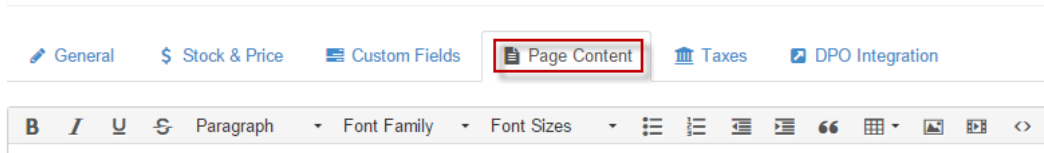
Custom Field Type Values

Custom fields can now be created as **Text**, **Big Text**, **Select Box** or **Check Box** fields. They can also be linked to DPO custom Gift UDF fields in your system.

Please Note:

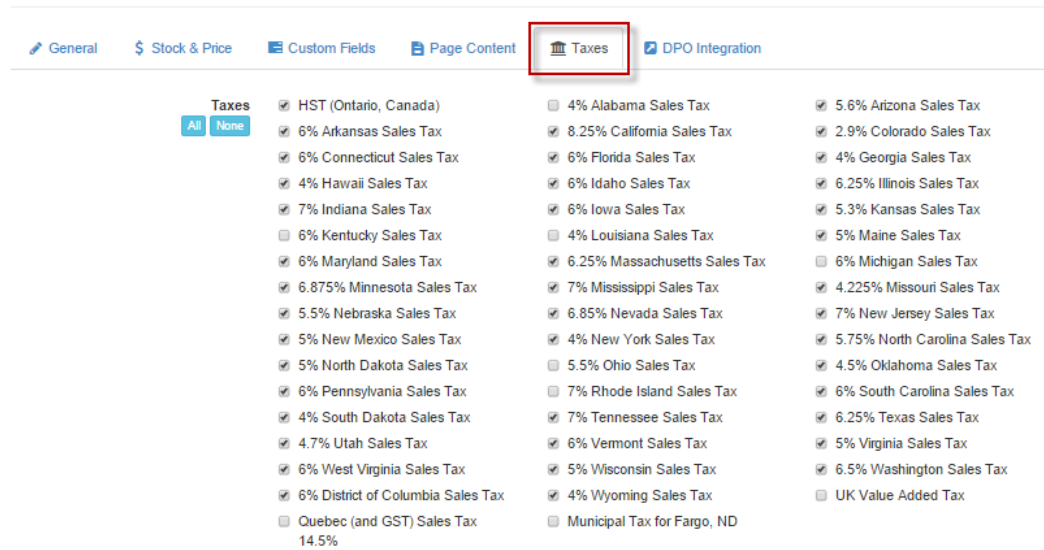
- Select Box options must be placed as one entry per line as shown in the example.
- **Select Boxes allow a single item to be selected.** If you need multiple selections, just create additional select box fields - e.g.; Person 1 Meal Choice, Person 2 Meal Choice, etc.
- **If a Check Box is set as 'Required'**, the customer will not be allowed to check out the item unless they have checked the checkbox. This can be really useful for situations where you need the purchaser to agree to terms before accepting the purchase.
- As always, **avoid setting custom fields as 'Required'** unless you really need the field completed. DonorShops will not allow them to purchase the item without completing all fields that are set as 'Required'
- Big Text is a memo type field for multi-line input by the site visitor

Tabs: Page Content



Position your mouse over any of the editing icons shown above to view text explaining the function of the icon.

Tabs: Taxes



Select any taxes that will apply to the purchase of this item.

To modify any of the listed taxes, see the Tax Definition section of this User Guide.

Taxes are charged based on the billing address of the purchaser.

Categories


Although the DonorShops.com eCommerce platform does not limit the number of categories you have in your system, you should not normally have more than seven or eight top level categories; otherwise the category names may appear over your logo.

DonorShops Pro and Unlimited also allow you to have one level of nested category headers. For example, you could have a Merchandise category with subcategories under this for Books, Clothing, and DVDs.

Product Categories

- [Members Exclusive](/products/members.php) /products/members.php
- [Feed the Whales](/products/feedthewhales.php) /products/feedthewhales.php
 - [Membership](/products/membership.php) /products/membership.php
 - [Swag](/products/swag.php) /products/swag.php
 - [Other Sponsorship](/products/othersponsorship.php) /products/othersponsorship.php
 - [Sponsor a Volunteer](/products/sponsoravolunteer.php) /products/sponsoravolunteer.php
 - [Child Sponsorship Nicaragua](/products/childsponsorshipnicaragua.php) /products/childsponsorshipnicaragua.php
 - [Child Sponsorship Bolivia](/products/childsponsorshipbolivia.php) /products/childsponsorshipbolivia.php
 - [Child Sponsorship](/products/childsponsorship.php) /products/childsponsorship.php
 - [Meal Programs](/products/mealprograms.php) /products/mealprograms.php
 - [Registration](/products/volreg.php) /products/volreg.php
 - [Category for Cynthia](/products/cynthia.php) /products/cynthia.php

The main Categories screen lists all the available categories and allows you to add new categories or edit/delete existing categories:

Use the edit icon  on the categories list page to access details for the desired item.

View/Edit Product Category

✓ Save ✗ Delete

Sequence

Name

Description

B *I* U **S** Paragraph Font Family Font Sizes

☰ ☰

Parent Category

Url This value cannot contain any special characters.

Use the Sequence field to control the order in which the categories display on your DonorShops.com eCommerce platform site. If you do not specify a sequence number, it will default to zero and will become the leftmost category displayed.

You can add text, images and video to the Description field in the category. To add images, upload the image(s) to the Image Library and then include reference links to these the same way you would if including images into page content. For more information on how to do this, please see the Images section under Site Configuration Tips in this document.

You control which categories a product appears in within the Products screen:

Categories

All None

- Members Exclusive
- Feed the Whales
 - Membership
 - Swag
 - Other Sponsorship
 - Sponsor a Volunteer
 - Child Sponsorship Nicaragua

Promotional Codes

Feature Applies To: DonorShops PRO, UNLIMITED

You can define promotional codes in the DonorShops.com eCommerce platform that allow users to get a discount on the contents on their cart if they enter a valid promotional code. The DonorShops.com eCommerce platform also allows you to specify a valid 'from' and 'to' date so that your promotional codes become active on the 'from' date and become inactive on the 'to' date.

The Promotional Codes screen is available by clicking on 'Promo Codes' in the main menu:

Promotions

+ Add Promotion

50 records per page
Quick Search:

▲	Code	Description	Discount (% off)	Start	End
Q	BASIC	For DPO Basic Members	5		
Q	BRONZE	For DPO Bronze Members	10		
Q	CHRPRES2014-1	Chris Pres Congregational Discount of 20 percent	20		
Q	ELITE	For SHOP Elite Members	12.37		
Q	GOLD	For DPO Gold Members	20		
Q	Pastor's Disc	Pastor's Discount	10	Jun 01, 2011	Sep 30, 2014
Q	PLAT	For DPO Platinum Members	25		
Q	SILVER	For DPO Silver Members	15		
Q	WF1102F33D	Summer Madness Discount on Feed the Whales Items	5	May 01, 2012	Aug 31, 2012

Showing 1 to 9 of 9 entries

Previous 1 Next

Promotional codes can be applied to individual product(s) or to one or more categories of products:

When you edit a promo code or add a new one, you will see this screen:

View/Edit Promotion

Save Delete

Code

Description

Discount % off each product

Active Dates to

Categories All None

- Meal Programs
- Child Sponsorship Nicaragua
- Sponsor a Volunteer
- Membership
- Art Classes for Kids
- Members Exclusive
- Registration
- Category for Cynthia
- Child Sponsorship
- eDownloads
- Feed the Whales**

Hold CTRL (Command on Mac) key to select multiple options.

Products All None

- 2 Meals per Day, Guatemala (AA5C104)
- Advanced Driver Safety (2EAF1F1)
- Alpha Registration (A6098AC)
- Art Class For Kids (4C2D767)
- BALANCE: Red Riding Hood (CA8ACB8)
- Concert Sunday June 27, Event (5D23D52)
- Construction Costs, Building Project (D5CC38E)
- delete 1 (C03E75B)
- DEPOSIT for Little Red Riding Hood (D43C38A)
- Donation With Amount Choices, Atlantic (59F44D2)
- ...

Hold CTRL (Command on Mac) key to select multiple options.

Use this screen to:

- Set the promo code in the Code field
- Add a description
- Specify the discount amount
- Specify Valid from and to dates. Promo codes will not be available before or after the specified date range
- Select categories to which the code will apply – you can select multiple categories using the CTRL key
- Select products to which the code will apply – you can select multiple categories using the CTRL key
- Save changes or delete promo codes

Checkout

This screen shows the purchaser the items they have purchased, prices, taxes, shipping and total order price.

They also use this screen to enter their Billing Information, enter comments if desired as well as their Payment Information.

When they click the button to complete their purchase, the DonorShops.com ecommerce platform will communicate with DonorPerfect Online and either add the purchase to an existing DPO donor (if the information they filled in matches the name, address and postal (zip) code of an existing donor OR create a new donor in DPO and add this gift to the new donor. If the purchaser put slightly different information in with the purchase than you have on file in DPO, you can use the DonorPerfect **Utilities > Duplicate Removal** tool to identify and merge any undesired duplicates.

NOTE: Site visitors will only see the Shipping Information panel if one or more items in their card is a product that you tagged as 'Requires Shipping'.

If you have the DonorShops Login Feature, your site visitors will also see a Remember Me panel under the credit card information where they can register for an account on your DonorShops system.

Checkout

Have a promo code?

1 Billing Information

Please enter a value

2 Shipping Information

Please enter a value

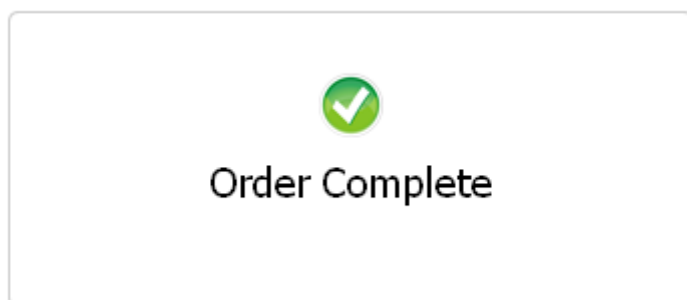
3 Payment Information

Create an Account

Choose a password to view your purchase history and update your profile.

Your credit card or account will be charged.

When they fill in the required fields and complete their order, they will see the order confirmation screen as shown below.



Please note that DonorPerfect is always provided with the name & address information in the Billing fields as the person ordering might have sent the order to a friend or family member, but the Billing information always corresponds to the person paying.

DPO will always use the Billing Address information for donor identification and creation even if a separate shipping address is provided.

When the customer completes their order and the payment processor confirms validity of credit card data, the purchaser will receive one or more email confirming their order and the amount. They will always receive the Order Received: To Customer email but they may also receive an additional Custom Email Notification if you have configured one. Please see the Email Notifications section for more information.

Orders

Orders List Screen

The **Orders List** screen displays DonorShops orders.

- Use the Filter Options to control which orders are displayed.
- Click the magnifying glass for an order to access order details.

Orders: Incomplete

[Mark as...](#)
[Download \(CSV\)](#)
[Packing Slips](#)

Order Status:
 Order Number:
 Start Date:
 End Date:

50 records per page Quick Search:

Order No.	Bill To	Email	Items	Total (\$)	Created Date
DA3950567F	Jacob Dotsaur	jacob@dotsaur.com	2	\$1,234.70	Mar 16, 2015 12:45pm
6E8CAB3362	Jacob Dotsaur	jacob@dotsaur.com	1	\$12.85	Mar 11, 2015 01:19pm
5B98ED2851	Mark Sandstone	mwarren@donorperfect.com	1	\$21.14	Jan 25, 2015 01:11pm
BB5D8F30B9	Mark Sandstone	mwarren@donorperfect.com	4	\$1,013.27	Jan 14, 2015 12:48pm
33EF5D6689	Susan Phillips	susan@savingwhales.com	2	\$211.11	Dec 23, 2014 04:03pm
3B3B2F2AAF	Richard Dyck	richard@olwr.mb.ca	1	\$100.00	Mar 12, 2013 03:01pm

Showing 1 to 6 of 6 entries

Order Details Screen

Use the Order Details screen to view and update orders:

Order Details		Options	
Order Number	Amount Charged	<input type="checkbox"/> This order has been processed.	
A37F72C14E	\$ 28.38	View Packing Slip	
Started At	Completed At	Renotify Customer	
Jan 22, 2015 10:133 AM EST	Jan 22, 2015 10:155 AM EST		
Confirmation Number		DonorPerfect Integration	
2554431053		Donor ID#:	
From Payment Gateway		438	
Confirmation Date		Gift ID#(s):	
Jan 22, 2015 10:155 AM EST		12007	
From Payment Gateway			
Vault ID			
No vault ID required.			
There are no recurring transactions in this order.			

- To mark orders completed from this screen, click the check box for 'This order has been processed'.
- You can also use the Renotify Customer button to re-send customer order emails.

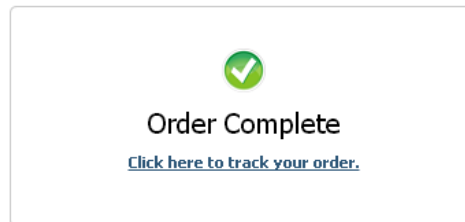
This screen also lists additional order details including:

- Custom Billing & Shipping field data
- Items ordered
- Shipping method selected
- Shipping and Tax charges

Order Processing FAQ

DonorShops.com eCommerce orders are processed through the **SafeSave Gateway**.

- Your SafeSave gateway interface is accessed via DonorPerfect Online interface (DPO: App Links: Processing Gateway).
- When the payment processor confirms the credit card purchase, the purchaser is shown a screen confirming that their order is complete:



- If you open the Order within DonorShops JPanel, you will also see a confirmation number in the Confirm. No field. This number is the SafeSave Gateway transaction ID number which you can search on in your DPO SafeSave Gateway interface (DPO: App Links: Processing Gateway).

Order Processing Steps Overview

The the site visitor clicks the button to process their order, the first thing that happens is that DonorShops communicates with your payment processor via the SafeSave gateway.

- If your payment processor rejects the order, no order is created by DonorShops. Instead, you can see the attempted order in the Abandoned Carts report.

If, on the other hand, the payment processor accepts the order, DonorShops will then communicate with DonorPerfect and...

- Determine whether the site visitor already exists in DonorPerfect based on their name, email and address information
- If the site visitor already exists in DonorPerfect, DonorShops will use their donor ID number for the creation of the gift(s) that will be associated with this donor.
- If the site visitor is not found, DonorShops will create a new donor in DonorPerfect.
- DonorShops then communicates with DonorPerfect to have the gift(s) added to the new or existing donor.
- DonorShops uses the DonorShops Product DPO Integration fields to determine what gift(s) are created.
- Gift amount(s) will include the price of the donation or purchase but do not include shipping or tax amounts.
 - Shipping amounts can be viewed in DonorShops in the Order Details window and are also included in a column of the Export Selected CSV order export output
 - Tax amounts can be viewed in DonorShops Order Details and tax totals are displayed in the DonorShops Tax Reconciliation report

When you open (edit) the order from the orders list, you will see the order details including the DonorShops.com confirmation number (Code column). You will also see the Donor ID to whom the order was applied and the Gift ID number(s) that have been created:

DonorPerfect Integration

Donor ID#:

👤 135

Gift ID#(s):

👤 12016

👤 12017

- The purchaser will receive the **'Order Received: To Customer'** email.
- If a Custom Email has been set up for one or more products in the order, the purchaser will also receive the corresponding Custom Email notification(s).

Donor and Gift Creation in DPO:

A separate DPO Gift ID will be created for **each unique combination of** the DonorPerfect Integration field code values within all purchased products within an order. This ensures that all items purchased are **always** tagged with the correct values in DPO. If the purchaser ordered several items that use ALL the same codes, they will appear as ONE gift in DPO.

DonorPerfect Integration

Donor ID#:

👤 135

Gift ID#(s):

👤 12016

👤 12017

The Donor ID and Gift ID numbers show at the bottom of the order are links that can be opened to show key Donor / Gift field data retrieved from DPO. **NOTE:** The Donor ID number show in the Gift ID# popup window will always show the same Donor ID# that you see in the Donor ID# link UNLESS you have done a DPO Duplicate Removal and merged this Donor ID# with another. In that case, go by the Donor ID# that is shown in the Gift ID# link popup window. It will have the correct (new) Donor ID number.

NOTE: If you have merged the purchasing donor into another DPO donor through the DPO Duplicate Removal tool, the Donor ID# field will still show the original Donor ID number. To view the new merged Donor ID number, click on any of the gift ID numbers and the Donor ID number you see in there will reflect the new Donor ID number.

Non Synchronized Orders

If, for some reason, DonorShops does not receive an appropriate response from DonorPerfect when asked to find/create the donor and gift(s) in DonorPerfect, the DonorShops order will be marked as a non-synchronized order and will be highlighted in red in the DonorShops Orders list screen.

		3309586C93	Maya Angeloux	ap@northwestern.edu	1	\$19.90	Feb 04, 2015 02:01pm
--	--	------------	---------------	---------------------	---	---------	----------------------

- When you open up a non-synchronized order, you will see a Re-Sync link

DonorPerfect Integration

Donor ID#:

0

Gift ID#(s):

0

Click this link to have DonorShops attempt to communicate with DonorPerfect to:

1. Ask DonorPerfect whether the donor exists
2. If not, create the donor
3. Create any appropriate gifts
4. As payment has already been successfully processed for non-synchronized orders, **DonorShops will NOT re-charge the customer** when you run the Re-Sync

The most likely causes of non-synchronized orders are:

1. DonorPerfect was busy and unable to respond at the time
2. If you have a series of non-synchronized orders, it is likely that your organization has changed the DonorPerfect connection credentials in DonorPerfect but has not made the corresponding change in DonorShops > Advanced Settings

Resend Customer Emails

If, for some reason, a customer indicates that they did not receive their order email(s), you can have DonorShops resend the order email(s) by going into the order details screen and clicking the **Renotify Customer** link. This will tell DonorShops to resend any emails that were associated with the order including any custom Email Notifications (e.g.; eTicket or Gift eCard):



DPO Reference/Check No.

In a DonorShops order, there is a Confirmation Number field. This will appear in DPO in the Reference/Check No. field **The DPO Reference/Check No. is the Transaction ID number in the SafeSave Gateway.**

You can copy the number from this field to use it in the search for the transaction in the SafeSave Gateway. There is also a reference in the Gift Memo field showing the DonorShops.com Order Number:

The DonorPerfect Gift Memo field will also contain the DonorShops order number and any value you placed into the corresponding Gift Memo field in the DonorShops DPO Integration product screen.

DPO Calculated Fields

Any calculated fields in your DPO system which rely on gifts created by DonorShops – e.g.; a calculated Receipt Amount field based on the Gift Amount minus **Fair Market Value** are handled slightly differently in DPO than fields entered through the DPO user interface.

If you do NOT have any DPO fields which calculate their results based on DonorShops gift/UDF fields, you can ignore this procedure.

To make DPO update the calculated results:

1. Go to **Settings > Calculated Fields**
2. Click the 'Recalculate All User Defined Calculated Fields' button.
3. DPO performs the selected calculations for all existing gifts.

Payment Type: Recurring

DonorShops allows you to create recurring payment items (Pledges) with monthly, quarterly or yearly payment intervals or you can set a recurring payment item to 'Let Customer Choose' and then the donor will be able to select the payment interval.

Payment Type:

In previous versions of DonorShops, it created the pledge in DPO but did not make an initial pledge payment charge. **This has changed** so that when the site visitor processes their cart, an initial pledge payment will be made and charged to the purchaser. We have made this change due to DonorShops client requests to make pledge handling consistent with the way WebLink handles pledges.

Key Points:

- The initial pledge payment is made by DonorShops at the time of the pledge purchase
- As before, subsequent pledge payments are handled by DPO when you do the EFT Transactions process
- DonorShops applies some logic when it creates the pledges in DPO so that:
 - If either Weekly or Bi-Weekly is chosen, the customer is presented with day of week options instead of day of month options. Both the day-of-week and day-of-month options are selected in the /settings panel.

- If either Weekly or Bi-Weekly is chosen, DonorShops will schedule the pledge start date for the first date of the selected day that is at least seven days from their order date.
- DPO will not charge them again within the month they signed up for the pledge
- DPO will not charge them again if the selected payment date (typically the 1st or 15th) **falls within ten days** of their pledge sign-up date. If it does, DonorShops will move the DPO pledge start date to the appropriate date on the following month.
- If you want the above **'ten day rule'** changed to a different number of days, this can be adjusted on your system. If so, contact us at **theteam@donorshops.com**
- **Example:** I sign up for a \$30 monthly pledge Sept. 28 and choose the 1st as my regular pledge withdrawal date. DonorShops will set the DPO pledge start date as November 1st because the automatic date would have been less than ten days after their pledge signup
- **Example:** I sign up for a \$30 monthly pledge Sept. 3rd and select the 15th as my regular pledge withdrawal date. DonorShops will set the DPO pledge start date as October 15th because even though the selected date isn't within ten days, it waits until the following month
- **Example:** I sign up for a \$30 monthly pledge on Sept. 12 and choose the 1st as my regular pledge withdrawal date. DonorShops will set the DPO pledge start date as October 1st because it is in the following month and does not fall within ten days of the pledge signup.

All subsequent pledge payments are processed in DPO using the **Tasks > EFT Transactions** screen. More help on this is available through the DPO Online Help and Knowledge Base:

Step 1: Generate Transactions Step 2: Review Transactions Step 3: Process Transactions

Refresh Transactions Process Transactions Clear All

Eligible Pledges Found With Criteria: Pledges due through = 07/31/2012, Payment type = Credit Card

Name	Account Number	Vault ID	Total / Balance / Frequency	Start Date	Amount to Process	Currency	Status
Brown Paul	Visa (x1111)	1048026650	Total: \$0.00 Balance: \$0.00 Frequency: Monthly	06/15/2011	\$15.00	CAD	Ready to Process

Inventory Stock Management

Applies To: DonorShops PRO and UNLIMITED

DonorShops allows you to enter, update and report on the inventory stock level of each product item and each defined variant of each product item.

There is a **Qty On Hand** field in the Product Details screen that allows you to set the stock inventory level for a product (and for each defined variant of each product). **The value shown in this field always reflects the inventory level you last set for this product (variant).**

It is the **Product Stock Levels** report that will show you the **CURRENT** inventory stock level for each product(variant) based on any purchases made **since** the last update of the Qty On Hand field. The number in the **'Remaining'** column of this report shows how many you currently have in stock.

Events and Training Classes:

You can also use the Inventory Stock Management feature to limit sales to events or training classes where there is limited seating. For example, if you are selling seats in a seminar that has space for fifty people, you can set the Qty On Hand to 50 and also set the **Out Of Stock** field to **"Stop accepting orders when out of stock"**. When the item is out of stock or the person tries to purchase more seats than the number of seats remaining, the system will indicate that this item is OUT OF STOCK and will not allow the purchase. You could also host an event that had different seating sections with different prices AND different numbers of available seats for each section.

If NOT using Inventory Stock Management feature

If you are not going to use this feature for now, you can ignore this feature and the corresponding report. Just make sure you **do NOT set** the Out Of Stock drop-down field to **"Stop accepting orders when out of stock."** in the product details screen for any product. If you have products that are at, or below, 0 inventory stock level, the system would then prevent your customer from purchasing them.

To use the Inventory Stock Management Feature

Inventory Stock levels are set for each product – and each variant of each product – in the Product Detail screen.

Stock & Price Variant Delete Variant

Sequence: Name:

Requires Shipping: Yes No Weight: lbs Is Default Variant: Yes

Regular Price: Sale Price:

Quantity Left: Restock At: Link to Membership:

Last update: 5 as of April 10th, 2013.

Show File Download Options

Adjust the Quantity Left field ONLY when you want to do a manual stock level adjustment.

Product Stock Levels Report

The Product Stock Levels report shows stock level information for each Stock & Price variant of each product including:

- Product name, variant and code
- The Qty and Last Updated columns which indicate the last manual stock level adjustment quantity value and date on which it was adjusted
- The number of items purchased through DonorShops
- The remaining quantity
- The restock level. If the remaining quantity is equal to or less than the Restock At quantity, the Remaining quantity will be listed in a red box.

Product Stock Levels

Filter Options

Category: Posters & /Stuff Filter: Any

Filter List

50 records per page Quick Search:

Name	Code	Qty	Last Updated	Purchased	Remaining	Restock At
Custom fields in Email Notification	878DDD5	0	May 23, 2013	0	0	1
Custom fields in Email Notification	878DDD5	0	May 09, 2014	2	-2	1
Donation	443DE5D	0	May 23, 2013	16	-16	1
FREE Brochures (Ten Brochures)	126A1ES-COPY	0	Jan 03, 2013	4	-4	0
FREE Kittens (Pkg. of Ten Kittens)	126A1ESA	0	Jan 03, 2013	0	0	0
FREE Kittens (Fifteen Kittens)	126A1ESA	0	Jan 03, 2013	0	0	0
FREE Brochures (Twenty Brochures)	126A1ES-COPY	5	Apr 17, 2013	0	5	0
FREE Kittens (Pkg. of Five Kittens)	126A1ESA	12	Apr 17, 2013	3	9	0
Whale Stickers	75DD755	500	Dec 31, 2014	2	498	0

Administration

- Check inventory levels using the Product Stock Levels report
- Perform manual stock adjustments within the product Stock & Price variant by adjusting the Quantity Left field
- If a site visitor encounters an indication that the item is OUT OF STOCK, it indicates that the product Out Of Stock field has been set to "Stop accepting orders when out of stock" and the remaining quantity is less than or equal to the Restock At level specified in the product Stock & Price variant.

Tax Definition

Taxes are defined through the Tax Rules menu item. When you click on this, you will see a list of taxes that have already been defined for your system and also a button to add new taxes:

Tax Rules + Add Tax

50 records per page Quick Search:

Code	Description	%	Regions
AB	Alberta Sales Tax	5	1
AL Tax	4% Alabama Sales Tax	4	1
AZ Tax	5.6% Arizona Sales Tax	5.6	1
CA Tax	8.25% California Sales Tax	8.25	1
CO Tax	2.9% Colorado Sales Tax	2.9	1

When you click on the edit icon (first column on the left), you will be able to edit all the parameters for the tax:

View/Edit Tax Save Delete

Name

Description

Rate %

State/Province(s)

Alabama

Alaska

Arizona

Arkansas

California

Colorado

Connecticut

Hold CTRL (Command on Mac) key to select multiple options.

City(s)

Seperate each city name using a carriage return.
This list is NOT case sensitive.

Taxes are applied when the **Billing** state/province for the order corresponds to a selected state/province in this window AND also the product screen has a checkbox checked for this state/province for this product.

Note the addition of the **City(s)**: field. This allows you to specify an additional regional/municipal tax amount on top of the state/provincial tax. If you have created a city tax, DonorShops will also look at the value they entered in the City field of the Billing Address to determine whether the City tax should ALSO be applied to the purchase.

In this example, we already have a provincial North Dakota tax specified as a separate tax entry. This

Fargo municipal tax is added as a new tax and we have specified municipalities affected and also a common mis-spelling as well in the City(s): box above. You can list multiple items to account for

- Different possible spellings of the municipality name
- Different local municipalities that all fall under the regional/municipal tax

This municipal tax will be added when the person specified a shipping address within North Dakota with a city name specified as one of the entries listed in the City(s) field below:

The screenshot shows a form for configuring a tax. The fields are as follows:

- Name:** Fargo Muni
- Description:** Additional Municipal tax
- Rate:** 2.5 %
- State/Province(s):** A dropdown menu with options: Ohio, Oklahoma, Oregon, Pennsylvania, Puerto Rico, Rhode Island, South Carolina, and South Dakota. Below the dropdown are buttons for "All", "None", "US Only", and "CA Only".
- City(s):** A text area containing a list of cities: fargo, west fargo, anderson park, brunsdale, and rose creek. Below the text area is the instruction: "Separate each city name using a carriage return. This list is NOT case sensitive."

A red box highlights the City(s) field and its instructions.

Notes:





If your site is using the Tiered Shipping Method, tax amounts are calculated based on product prices, not on shipping charges.

If your site is using the Courier Based Shipping Method available in DonorShops PRO and DonorShops Unlimited, then the default is to not apply taxes to shipping charges BUT you can send a request to theteam@donorshops.com to have this option changed to 'Apply taxes to shipping charges'.

Email Notifications

Feature Applies To: DonorShops LITE, PRO, UNLIMITED

System Emails

	Name	Status
	Account: Password Reset	Online
	Account: Updated	Online
	Account: Welcome	Online
	Order Received: To Admin	Online
	Order Received: To Customer	Online
	Order: eDownload Links	Online

When the customer completes their order and the payment processor confirms validity of credit card data, the purchaser will receive one or more email confirming their order and the amount. They will always receive the Order Received: To Customer email but they may also receive an additional Custom Email Notification if you have configured one. Please see the Email Notifications section for more information.

You can have your DonorShops system send you a 'BCC' of the customer order to one or more preset email addresses by entering the desired email addresses in the BCC field for the desired email notification.

Bcc:
Must be a comma separated list.

DonorShops also provides an **Email Notify** field so you can append additional email addresses on a per product basis. This allows you to have a particular person (or persons) who are managing a particular product and to send a copy of the order confirmation email as well when an order for the product is received.

Email Notify:
An email notification will be sent to these addresses anytime this product is purchased. Multiple addresses must be separated with a comma.

This feature allows you to modify the content and BCC addresses of the emails that DonorShops sends to your customers:

List of Email Notifications:

Name	Function
Account: Password Reset	Sent when an account holder resets their password
Account: Updated	Sent when the account holder makes any changes to their My Profile information

Account: Welcome	Sent when person uses Register to create an account
Order Received: To Customer	<p>This is the standard order confirmation email.</p> <p>If you enter one or more BCC email addresses for this email, those email addresses will receive copies of every DonorShops order.</p> <p>If you want BCC email address for certain products, enter the desired email address(es) in the Email Notify field in the desired product(s).</p> <p>If you want an additional product specific email with different content sent, create a separate Email Notification and link it to the desired product. (like the eTicket example on the next page of this user manual).</p>
Order Received: To Admin	Use this if you want an order confirmation with different content sent to your organization when an order is received.

OTHER PRODUCT SPECIFIC EMAILS	
<p>e.g.; Saving Whales Conference eTicket</p> <p>e.g.; Sept 2013 Uganda....</p> <p>Etc....</p>	<p>This is just an example an additional Email Notificaiton email created by an organization. These are always linked to a single product and allow you to do things like, as in this example, sending an eTicket to people who register for this event.</p> <p>These are also ideal for situations where you are registering volunteers and you need to send them information on what to do next to prepare for the activity.</p>

[View/Edit Email Notification](#)

View/Edit Email Notification

✓ Save

✕ Delete

General

Name

Status

Email

To

Subject

Cc
Must be a comma seperated list.

Bcc
Must be a comma seperated list.

Email Body

B *I* U **S** Paragraph Font Family Font Sizes

[[bill_first_name]] - Thank you for your gift to [[shop_organization]]

Email Notification Variables

When you are editing the content of your Email Notifications, you can insert values into them such as the person's name/address information, the number of items purchased and the name of the product variant they selected using Email Notification **merge tags**. The list of available merge tags is shown in the **merge tag cheat sheet** which you can access at the bottom of the email content window:

[Click to access the merge tag cheat-sheet.](#)

This is an example of how you can set up a custom Email Notification that can be used as an eTicket.

DonorShops eTicket Services

Event Registration eTicket: Saving Whales Conference Registration

Name: Maya Angeloux

3240 Billing Ave, Winston-Salem, NC

Number of tickets purchased: **1**

Registration Type: **Monday Only**

Ticket ID number: C0F749587A



Event Date: **May 10, 2013**

Event Time: **06:00 p.m.**

Event Location: **123 Main St., Fargo, ND**

Dress: **Smart Casual**

PLEASE PRINT THIS eTICKET AND PRESENT IT AT THE DOOR ON YOUR ARRIVAL

This is the Product Detail window for this Email Notification:

The screenshot shows a rich text editor interface with a toolbar at the top. The content of the email notification is as follows:

DonorShops eTicket Services

Event Registration eTicket: [[product_name]]

Name: [[bill_first_name]] [[bill_last_name]]

[[bill_address_01]], [[bill_city]], [[bill_state]]

Number of tickets purchased: **[[quantity]]**

Registration Type: **[[variant_name]]**

Ticket ID: **[[order_number]]**

Event Date: **May 10, 2013**

Event Time: **06:00 p.m.**

Event Location: **123 Main St., Fargo, ND**

Dress: **Smart Casual**

PLEASE PRINT THIS eTICKET AND PRESENT IT AT THE DOOR ON YOUR ARRIVAL

Path: p » strong

Click to access the [merge tag cheat-sheet](#).

Tips & Tricks

Notice that this email also includes a QR Code (barcode) that can be automatically generated by DonorShops.

You can include a simple event checkin QR code with the `[[checkin_qr]]` tag...

To Resend Email Notifications: In the order details screen, there is a 'Resend Customer' link that causes DonorShops to resend any email notifications, including standard order notification emails, to the customer.

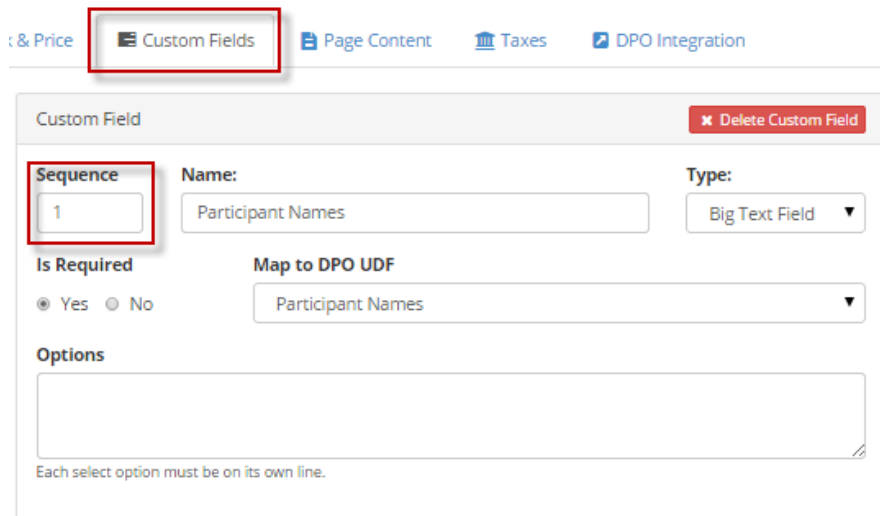


Custom Fields in Email Notifications

You can also include Custom Field data in your email. The key to doing this is using the sequence numbers in your product custom fields (shown as 1, 2, and 3 in the example below). Just refer to the sequence number in your email notification shortcode. For example, this code (below) would cause the value of custom field sequence number 2 to appear in your custom email notification:

`[[custom_field_02]]`

In this example, you would use `[[custom_field_01]]` to get the Participant Names,

A screenshot of the DonorShops Custom Fields configuration interface. At the top, there are navigation tabs: "& Price", "Custom Fields" (highlighted with a red box), "Page Content", "Taxes", and "DPO Integration". Below the tabs is a "Custom Field" configuration form. The form has a title "Custom Field" and a "Delete Custom Field" button. It contains several fields: "Sequence" (a text input with the value "1", highlighted with a red box), "Name:" (a text input with the value "Participant Names"), "Type:" (a dropdown menu with "Big Text Field" selected), "Is Required" (radio buttons for "Yes" and "No", with "Yes" selected), "Map to DPO UDF" (a dropdown menu with "Participant Names" selected), and "Options" (a large text area with a note: "Each select option must be on its own line.").

QR Code Event Attendance

DonorShops allows you to automatically generate a Check-In QR code into a custom email notification for an event.

DonorShops does NOT require a specific mobile phone scanning application. There are lots of free apps out there. Try a few out and find one you like!

This allows your event registration staff to:

- scan the eTicket at the gate with a mobile device
- view the number of people who have already checked in on this ticket
- check people in with the displayed 'Check In Now' button
- display any custom field options set for the ticket – e.g.; if the people requested a seat near the band, it will display on the QR Check-In page shown on the mobile device



And allows your desktop users via JPanel to:

- display the event-specific Event Check-Ins Report to see who has checked in

Check-Ins

<input type="checkbox"/>	Code	Product	Variant	Ticket Count	Checked-In			First Check-In	Last Check-In
					Once	Multiple	Not Yet		
<input type="checkbox"/>	156900C	Saving Whales Conference Registration	ALL ACCESS	2	0	0	2		
<input type="checkbox"/>	156900C	Saving Whales Conference Registration	Tuesday Only	6	2	1	4	Sep 16, 2013 11:03am	Sep 17, 2013 7:51am
<input type="checkbox"/>	156900C	Saving Whales Conference Registration	Monday Only	5	0	0	5		

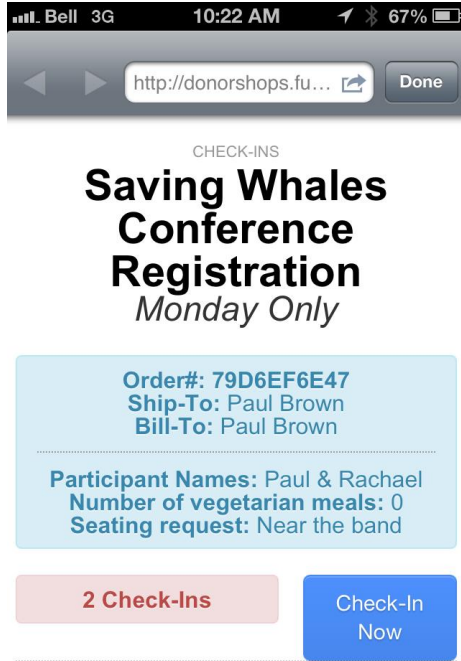
How To Set Up QR Code Event Attendance

- This feature must be enabled on your system and is included in both DonorShops PRO and DonorShops UNLIMITED configurations
- You MUST enable the '**Enable Event Check-Ins**' option within the event product(s).
- Add the **[[checkin_qr]]** merge tag to the Custom Email Notification for the event
 - **Remove** any other QR coding you may have already had in your custom email notification. You don't want registration staff to scan the wrong code.
- Create **JPanel** logins for your gate registration staff BUT ONLY ENABLE the '**Can process event Check-Ins**' option (unless you actually want them to have other JPanel access)
 - When they scan their first ticket, they will have to log into JPanel with these credentials and this will allow them to view the mobile device checkin display (shown on previous page) for subsequent ticket check-ins

Suggestion: You may also wish to create a Test Event on your DonorShops system with a sample QR code checkin eTicket so you can show your registration staff how to use this on their mobile devices before the doors open for your actual event. Once you have one eTicket for your test event, you can use (scan) it over and over again for training your staff.

Screens

Mobile Phone



Note that the display automatically shows any Custom Field values – in this case, the participant names, the number of vegetarian meals requested and where they wanted to sit.

Here, the user has scrolled down a little on the page to see when the 2 Check-Ins occurred:

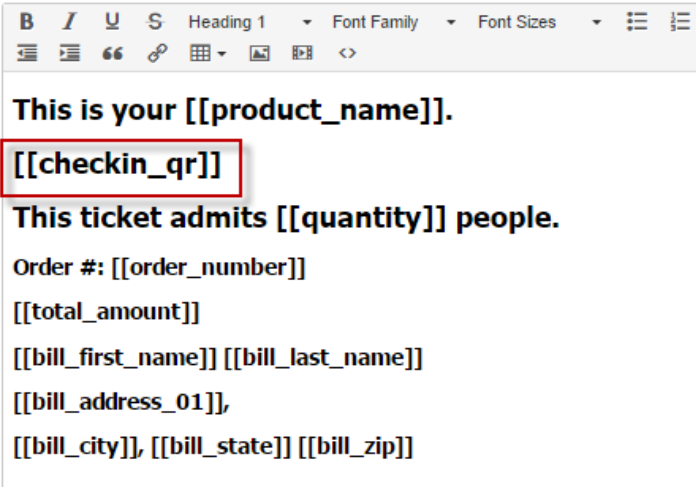


So, if somebody else comes in with a bogus BCC of the event registration email, when they get to the door, it will show that there were already 2 check-ins for this ticket six minutes ago.

Custom Email Notification

A Custom Email Notification showing the `[[checkin_qr]]` merge tag that actually generates the QR code within the email

Email Body



The screenshot shows an email editor interface. The main content area contains the following text:

This is your `[[product_name]]`.
`[[checkin_qr]]`
This ticket admits `[[quantity]]` people.
Order #: `[[order_number]]`
`[[total_amount]]`
`[[bill_first_name]]` `[[bill_last_name]]`
`[[bill_address_01]]`,
`[[bill_city]]`, `[[bill_state]]` `[[bill_zip]]`

The `[[checkin_qr]]` tag is highlighted with a red rectangular border.

Event Check-Ins Report

Back in JPanel, you can see the Event Check-Ins Report.

First, the list of events and event variants:

Check-Ins

50 records per page Quick Search:

	Code	Product	Variant	Ticket Count	Checked-In			First Check-In	Last Check-In
					Once	Multiple	Not Yet		
Q	156900C	Saving Whales Conference Registration	Tuesday Only	6	2	1	4	Sep 16, 2013 11:03am	Sep 17, 2013 07:51am
Q	156900C	Saving Whales Conference Registration	Monday Only	6	1	1	5	Sep 17, 2013 09:40am	Sep 17, 2013 09:40am
Q	156900C	Saving Whales Conference Registration	ALL ACCESS	4	1	0	3	Sep 19, 2013 01:20pm	Sep 19, 2013 01:20pm

Then, the detailed attendance information for a particular Event/Variant Combination:

50 records per page Quick Search:

	Order	Bill-To	Ship-To	Checked-In	Check-In Count	Last Check-In
Q	F4F22EF21F	Angeloux, Maya	Angeloux, Maya	Yes	1	Sep 17, 2013 7:51am
Q	F1033BF2EE	Angeloux, Maya	Angeloux, Maya		0	
Q	19F97FD233	Angeloux, Maya	Angeloux, Maya		0	
Q	EE9C04A40D	Angeloux, Maya	Angeloux, Maya		0	
Q	B285E1FF5B	Angeloux, Maya	Angeloux, Maya		0	
Q	CC9EAAE97F	Mail, Edgar	Mail, Edgar	Yes	2	Sep 16, 2013 2:10pm

Shipping

DonorShops PRO and UNLIMITED have the option of using Courier based shipping.

DonorShops LITE provides the Tiered shipping method.

Feature Applies To: DonorShops PRO, UNLIMITED

Tiered Shipping

The Tiered Shipping feature of DonorShops Pro and Unlimited allows you to assign shipping charges to orders **based on the value of items in the order that require shipping** and the Shipping Option (e.g.; shipping method).

	Qty		Price	Total
		✘	\$20.00	\$20.00
	4	✘	\$30.00	\$120.00
	7	✘	\$7.50	\$52.50
Sub-Total:				\$192.50
Shipping: Express Post				\$14.95
Tax:				\$9.11
Total (USD):				\$216.56

When your site visitors get to the cart page to process their order, they will see a list of shipping options. In the above example, the shipping price being displayed is based on using the Express Post shipping option.

- Shipping options are only displayed if one or more of the items in the cart are set to require shipping.
- The shipping price is only calculated on the items in their cart for products you indicated Requires Shipping:

- The amount they pay depends on the Shipping Tiers defined and the value of the portion of their order that requires shipping:

Tiered Shipping

+ Add Shipping Option + Add Shipping Tier

Name	Default	\$4.00 - \$99.99	\$100.00 - \$249.99	\$250.00 - \$499.99	\$500.00 - \$999.99
Express Shipping	No	\$14.85	\$27.45	\$32.81	\$10.00
Standard Shipping	Yes	\$7.95	\$14.57	\$19.98	\$0.00

In this example, there are four Shipping Tiers and two shipping methods. You can have more tiers (or less) if you like.

In the above example, if a site visitor places an order that includes \$150 worth of items that require shipping and they select Express Shipping, they will be charged \$27.45 for shipping.

To modify the Shipping Tier Min/Max values, click on the pencil icon (highlighted in above image):

Minimum Value

Maximum Value

The Tiered Shipping method also allows you to offer lower shipping charges to customers who place high dollar value orders.

NOTE: We recommend you create your Shipping Tiers BEFORE filling in your Shipping Options. This will save you having to go back into each Shipping Option to fill in the prices for the new Shipping Tier.

Courier Based Shipping

This feature is new for DonorShops. It provides shipping prices based on actual shipping charges from FedEx, UPS, USPS, Canada Post based on your organizations location, the purchaser's location and the ship-able product weight:

Shipping:



- FedEx International First at \$200.19
- FedEx International Priority at \$112.17
- FedEx International Economy at \$96.25
- FedEx Ground at \$18.62

(Total weight: 1.4lbs)

\$18.62

- **IMPORTANT:** In the View/Edit Product screen, make sure you set a weight value of greater than 0 pounds for any items that require shipping otherwise shipping charges will not be added to the order

Requires Shipping

Yes No

Weight:

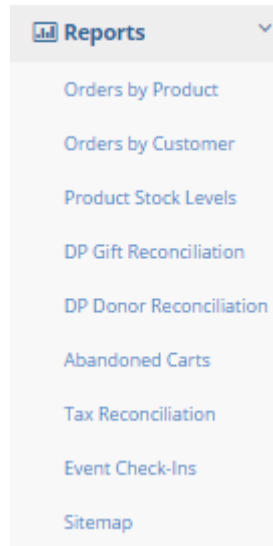
If your system is currently configured to use Tiered Shipping, but you would like to switch it to Courier Based Shipping, contact us at theteam@donorshops.com. Courier Based Shipping requires setup of accounts with your existing courier(s).

Currently Supported:

- FedEx
- USPS
- UPS
- Canada Post

Reports

DonorShops includes these reports:



Orders by Product Report:

This report shows a summary of purchases of each product item. When you click the edit icon, the system will show the individual purchasers of this item and any product variants selected (DonorShops PRO, UNLIMITED).

If you click the [Export Selected](#) link, DonorShops will export a CSV file containing all order fields for the selected item(s) including product variants and Custom Field values input by the purchaser (e.g.; student names, meal requirements, seating preference, etc.)

If you click the edit icon in this screen, the system will retrieve the order details page for the selected order.

Orders by Customer Report

This report shows a summary of total purchases by each customer:

When you click the Edit icon, the system provides a detailed report on all purchases made by the **selected** customer. You can filter this list by date range and/or order status:

DP Gift Reconciliation Report

This report shows DonorPerfect GL Code, Solicitation Code, Sub-Solicitation Code and Campaign Code values for each Gift ID created in DonorPerfect that was a DonorShops purchase.

This can be especially useful in situations where DonorShops created multiple gifts for a customer purchase of multiple items. Remember that DonorShops will create multiple gifts for a customer

purchase ONLY when there are different DP Code values that need to be preserved

DP Donor Reconciliation Report

The Donor Reconciliation report shows a summary of the number of gifts, the total given, the maximum amount given and the first gift date for each DonorShops customer on your site.

Product Stock Levels Report

The Product Stock Levels report shows your DonorShops product inventory levels:

- Items that are out of stock will show in red text at the top of the report.
- The value in the Qty column is always based on the inventory level you manually set within the product variant
- The Remaining amount is the last set Inventory value minus the purchased quantity

For more information, please see the Inventory Stock Management section of this document.

Abandoned Carts Report

The Abandoned Carts report shows visits to your DonorShops system where one or more items were placed in the cart, but the site visitor did not complete their purchase.

The Abandoned Carts report can be filtered both by date range and also by Status:

Status	Meaning
Any	Show all entries
Pre-Checkout	The site visitor did not attempt to complete their purchase
Checking Out	The site visitor filled in form fields and possibly product items but did not click the checkout button to process payment
Failed Payment	The site visitor attempted to checkout, but their payment information was rejected by the payment processor. Reason for failure, if returned by the SafeSave gateway, will be included.

If the person left the site before filling in their name/address/email information in the Bill To fields, then the Abandoned Carts list report will show 'n/a' in the 'Bill To' column. If, on the other hand, they did complete these fields, then **this gives you the opportunity to contact the site visitor to offer assistance completing the order**

If you open up the Abandoned Carts order to view the order details, you will be able to see whatever name/address/email information they did fill in as well as the items they placed in their cart. (see *image next page*)

DonorShops Account Login

Applies To: DonorShops PRO and DonorShops UNLIMITED

The DonorShops Account Login feature allows your site visitors to register for an account on your DonorShops system either when they are making a purchase or via a self-registration form.

DonorShops Accounts

Login Register

- Login:** For existing account holders
- Register:** To create a new Account
- Option to create an account also available in checkout screen

Sign Up Today

General **Billing Address**

First Name

Last Name

me@domain.com

Password

Password

Select a Country

My Profile

Use the form below to update your profile. Click the 'Update Profile' button at the bottom to save your changes.

General **Billing Address**

Mark

Canada

Shipping Address

Copy from Billing

Canada

37 Elmley St.

Address Line 2

London

Ontario M8B 3

Phone #

My History

Online History

Date	Order Number	Items	Ship To	Amount
Apr 02, 2015	1007D43994	1	-	\$12.45

All History

Please note: The SavingWhales accounting records shown below do not include shipping or tax amounts.

Date	Receipt Number	Amount
Apr 02, 2015		\$12.45
Jan 26, 2015		\$21.14
Jan 14, 2015		\$140.00
Jan 14, 2015		\$750.00
Jan 14, 2015		\$123.27
Jul 15, 2014	W0912-303	\$600.00

NOTES:

- This front-end login is NOT used to log into the JPanel Administrative Interface
- The visibility of the option to create an account in the checkout screen is controlled in Advanced Settings: Show 'Create an Account' option
- You can control whether you want to include the DPO giving history in the My History report
- When the user is logged in, they go to My Profile to add shipping field information if desired
- When the user is logged in and adds item(s) to the cart, the My Profile Billing/Shipping information is automatically filled in for them
- When logged in, the users first name is shown and they can select the My Profile or My History from the drop-down menu:

Welcome, Mark ▾

[My Profile](#)

[My History](#)

[Logout](#)

Personal Information Security/Control

- Your organization controls activation status for each member account
- My Profile and My History information is only available to logged in users with a DPO Donor ID connection that is keyed to the email address stored in DPO for this DPO constituent
- Your organization controls whether Your DonorShops site will display My History and/or My Profile pages
- Your organization controls whether the My History page displays only DonorShops purchase history or also reports on the constituents giving history in your organizations DPO system.
- On a password reset request (Forgot my Password), the re-activation email is sent to the email address of the requesting party only if they already have a DonorShops Login account.
- Under no circumstances can your DonorShops Login account holders modify their giving history information (*other than indirectly by making additional purchases or donations*).

Login Link

The visibility of the Login link is controlled by a system Login page.

- **Use the Status Online / Offline drop down menu item for this page to control whether site visitors see the Login link.**

A common usage example is keeping the Login page Offline while you are setting up your membership and then switching it Online when you are ready for site visitors to log into your site.

This page includes the `[display_login_form]` code.

This page also includes a link to the Forgot Your Password page.

NOTE: Passwords are case sensitive. For example, if they entered 'jOhN' as their password, 'john' will not work.

Register

The Register page allows site visitors to create their own DonorShops Login without making a purchase or donation.

When your site visitor registers for an account using the Register screen,

- A system-wide setting in DonorShops controls whether DonorShops checks for or creates a new donor in your DPO system when people register for an account via the Register form .
- The default for this option is to check and create if required
- If you would like this setting changed for your DonorShops site, please contact theteam@donorshops.com.

When a site visitor registers for an account using the Register screen, they gain the ability to log into your DonorShops site, to view and update their My Profile information and to view their giving history using the My History screen. It also means that when they login and make purchases, DonorShops will automatically retrieve the billing and shipping information stored in My Profile. Please note that they must always enter their credit card information for any new purchases.

👤 General	📍 Billing Address
<input type="text" value="First Name"/>	<input style="border-bottom: 1px solid #ccc;" type="text" value="Select a Country"/>
<input type="text" value="Last Name"/>	<input type="text" value="Address Line 1"/>
<input style="border-bottom: 1px solid #ccc;" type="text" value="me@email.com"/>	<input type="text" value="Address Line 2"/>
🔒 Password	<input type="text" value="City"/>
<input style="border-bottom: 1px solid #ccc;" type="text" value="Password"/>	<input type="text" value="Province/State/Region"/>
<input style="border-bottom: 1px solid #ccc;" type="text" value="Confirm Password"/>	<input type="text" value="Postal/ZIP"/>
<input type="button" value="✔ Register"/>	

The visibility of the Register link is controlled by a system Register page.

- **Use the Status Online / Offline drop down menu item for this page to control whether site visitors see the Register link.**

A common usage example is keeping the Register page Offline while you are setting up your membership and then switching it Online when you are ready for site visitors to create DonorShops Login accounts on your site.

This page includes the `[signup_form]` code.

NOTE: Passwords are case sensitive. For example, if they entered 'jOhN' as their password, 'john' will not work.

👤 General	📍 Billing Address
<input type="text" value="First Name"/>	<input style="border-bottom: 1px solid #ccc;" type="text" value="Select a Country"/>
<input type="text" value="Last Name"/>	<input type="text" value="Address Line 1"/>
<input style="border-bottom: 1px solid #ccc;" type="text" value="me@email.com"/>	<input type="text" value="Address Line 2"/>
🔒 Password	<input type="text" value="City"/>
<input style="border-bottom: 1px solid #ccc;" type="text" value="Password"/>	<input type="text" value="Province/State/Region"/>
<input style="border-bottom: 1px solid #ccc;" type="text" value="Confirm Password"/>	<input type="text" value="Postal/ZIP"/>
<input type="button" value="✔ Register"/>	

My Profile

The My Profile member page allows the logged in member to review **and update** their personal information:

My Profile

Use the form below to update your profile. Click the 'Update Profile' button at the bottom to save your changes.

<p>General</p> <p>Mark</p> <p>Sandstone</p> <p>mwarren@donorperfect.com</p> <p>Password</p> <p>Change Password</p>	<p>Billing Address</p> <p>Canada</p> <p>37 Elmsley St.</p> <p>Address Line 2</p> <p>London</p> <p>Ontario N6B 3C2</p> <p>Phone #</p>	<p>Shipping Address</p> <p>Copy from Billing</p> <p>Select a Country</p> <p>Address Line 1</p> <p>Address Line 2</p> <p>City</p> <p>Province/State/Regi Postal/ZIP</p> <p>Phone #</p>
--	---	--

Save Profile

When a DonorShops account holder updates their profile, **the account holder will receive an email** indicating the change(s) they have made to their profile. You can also have DonorShops send you a 'BCC' of this email to notify you - as the organization using DonorShops - of the account holder profile change.

The updated values are automatically sent to DonorPerfect! This makes it possible for your supporters to help keep your DonorPerfect records up to date!

My History Link

The My History member page shows the logged in member their giving history:

- Includes a section showing DonorShops purchases/donations. This is controlled by the **[display_transaction_history]** shortcode.
- Includes section showing all DPO gifts (via DonorShops or not) if the member has a Donor ID number and is synched with DPO. This is controlled by the **[display_dp_transaction_history]** shortcode.
 - Note: This report includes only gifts with a Record Type value of 'G' (Gift) and intentionally exclude parent pledge entries ('P'), Main ('M'), Soft Credits ('S'), etc.

We encourage you to include phone and email information where your account holders can contact your organization if they have any questions.

My History

Shop History for Roger Sandstone

Date	Order Number	Items	Ship To	Amount
Oct 24, 2012	E262CA16BB	5	1-275 William St, ON N6B 3C2	\$154.87

SavingWhales account records for Roger Sandstone

Date	Receipt Number	Amount	Fair Market Value	Net Donation
Oct 24, 2012		\$29.85	\$0.00	\$29.85
Oct 24, 2012		\$100.00	\$0.00	\$100.00
Oct 14, 2012	W2011-107	\$22.50	\$0.00	\$22.50
Oct 14, 2012	W2011-107	\$100.00	\$25.00	\$75.00

In the above example, two additional shortcodes are used. The line that shows “Shop History for Roger Sandstone” is set up in the My History system page (accessed via Content: Manage/Edit Pages) as:

Shop History for [member value='first_name'] [member value='last_name']

Accounts Administrative Interface





List Screen

The screenshot displays the Accounts Administrative Interface. On the left is a sidebar menu with options: Dashboard, Content, Feeds, eCommerce (10), Accounts (highlighted), Memberships, Reports, Files, Site Design, and Administration. The main content area has a header with 'Your Organization Name', 'Mark', and 'Help'. Below the header is the 'Accounts' section with buttons for '+ Add Account', 'Export Emails', and 'Show Inactive'. A chart titled 'New Accounts by Month' is shown. Below the chart is a 'Quick Search' field and a '50 records per page' dropdown. A table lists account records with columns: LastName, FirstName, Email, Has Login, Orders, Orders Total, and Created.

LastName	FirstName	Email	Has Login	Orders	Orders Total	Created
[Redacted]	[Redacted]	[Redacted]	✓	1	37.60	Apr 10, 2015
[Redacted]	[Redacted]	[Redacted]	✓	1	282.50	Apr 10, 2015
[Redacted]	[Redacted]	[Redacted]	✓	0	0.00	Apr 2, 2015

Account Details Screen

Mark Sandstone ✓ Save ✗ Delete 📄 View Orders

 Mar 15 Member Since	 2 Orders/Txns	 \$12.28 Avg Txn Value	 \$24.57 Grand Total
---	---	---	---

General

Status **First Name** **Last Name**

Email **Password**

Membership

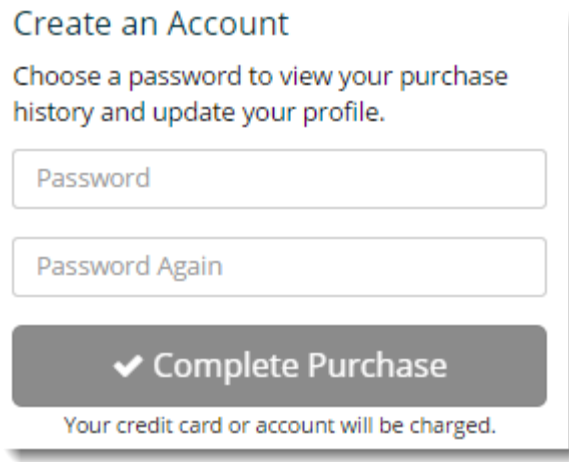
Level **Expires on**

DonorPerfect Integration

Donor ID **Membership Sync Status**

Cart: Create an Account

When the site visitor makes a purchase on a system that has membership running, they will see a Create an Account panel in their checkout cart under the credit card fields:



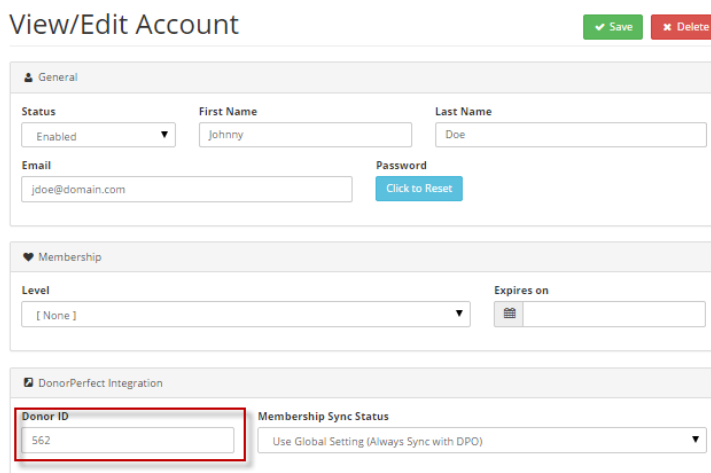
When your site visitor makes a purchase and enters a Create an Account password, an account registration email will be sent to the site visitor allowing them to log into your DonorShops site.

The Create an Account registration checks your DPO system to find out if the person already exists in your DPO database and creates a new DPO constituent if required. The Donor ID of the constituent is recorded in the DonorShops account.

You can also set up your system to send you a 'BCC' of this email so that you receive notification of account registrations by entering the desired email address in the BCC field of the Account: Welcome Email Notification.

DonorPerfect Donor_ID Changes

If you change the DonorPerfect Online (DPO) Donor ID number of a donor who has an account in your DonorShops site, you must change the corresponding value for the account holder in JPanel > **Administration > Accounts:**



Getting Started with DonorShops Accounts

Step	Action	Notes
1	Email theteam@donorshops.com to let us know you would like this feature activated on your DonorShops site	When DonorShops Login has been activated, you will see new System Pages in your Manage/Edit Pages list for: Login, Forgot Your Password, My Profile, My History and Register
2	Make any desired updates to your System Pages	<p>Example:</p> <ul style="list-style-type: none"> You can disable the Login and Register links by taking these system pages 'Offline' If you don't want to allow your supporters to view their DPO gift history, you can disable this part of the My History page. Consider adding your phone/email contact info to the Register and My History pages so they can reach you if they have any questions
5	Communicate with your supporters	<p>Let them know..</p> <ul style="list-style-type: none"> They can Register via the Register link on the home page or by using the Remember Me link on the checkout cart page. When they are logged in, the Shipping and Billing fields in the cart will be pre-filled for them and they only need to enter their credit card information to make a purchase They can update their profile information and view their shop purchasing history (<i>and their DPO giving history if you are enabling this</i>).
6	Activate the Login and Register pages if you took them offline in step 2 above.	

DonorShops Membership

Applies To: DonorShops UNLIMITED

DonorShops Membership brings your organization and your supporters closer together. When a member logs into your DonorShops site, they land on a page that is specific to their membership category where you can tell them with text, images and video how much their support means to you and about how you want to honor their loyalty by giving them member discounts specific to their membership level. You could even give them links to product or event items that aren't listed publicly yet!

They can also review their current membership level and expiry date and upgrade or extend their membership through **DonorShops membership products** that are linked to specific membership levels.

DonorShops Membership



If the account holder logs in and they ALSO have a membership level,

- they can be automatically directed to a landing page that is specific to their membership level where you can do things like
 - displaying their membership expiry date,
 - offer them opportunities to renew or upgrade their membership
 - let them know about the discounts available to their membership level
 - direct them to pages and products that are not visible to the general public but ARE specific to their membership level.
- You can give members automatic promotional discounts

DonorShops Membership Setup Overview

Step	Action	Notes
1	Make sure your DonorShops login features are set up.	See previous section in this document.
2	Check and update your membership levels in your DPO system	Ensure your existing membership levels and settings for all your constituents (donors) are current and correct.
3	Set up promotional codes as required for each membership level in DonorShops	
4	Setup Membership landing pages in DonorShops	Can either be a shared landing page for all membership categories or one per category
5	Create Membership levels in DonorShops	These levels will normally correspond to your DPO membership levels. Remember that when you are creating matching levels in DonorShops, you must use the CODE value of the DPO membership level
6	Setup any membership products you will offer on your DonorShops site	.
7	Create any members-only products, categories and pages and then tag your membership level(s) with these items	If you have multiple membership levels, make sure you tag these items properly for each membership level.
8	Communicate with your supporters	Let them know.. <ul style="list-style-type: none"> • They will be able to Register via the Register link on the home page or by using the Create an Account link on the checkout cart page. • When they are logged in, the Shipping and Billing fields in the cart will be pre-filled for them and they only need to enter their credit card information to make a purchase • They can update their profile information and view their shop purchasing history (<i>and their DPO giving history if you are enabling this</i>).
9	Activate the Login and Register pages if you took them offline in step 1 above.	
	If you want to create DonorShops Login accounts for your existing members, contact theteam@donorshops.com to request uploading of these	

Membership Configuration

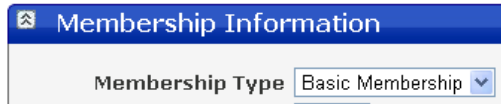
DonorShops gives you a choice on how you want to configure membership.

- Use DonorPerfect Online Membership Levels **OR...**
- Use DonorShops SHOP Membership Levels

If your DonorShops site is configured to use DonorPerfect Online Membership Levels, whenever a site visitor logs in using their DonorShops Login, DonorShops will check and update their membership level

from DPO.

DonorPerfect Membership Levels



You can use the membership functionality built into DonorPerfect Online (DPO) by creating DonorShops Member Levels that have a corresponding DonorPerfect Level. With this type of membership setup, you are responsible for setting up and maintaining correct membership levels within your DPO system.

There are some points you should be aware of regarding this type of setup:

- DPO provides Online Help that provides information on DPO membership setup
- The easiest way to do a global member level update in DPO is to create a DPO export template that includes at least the DONOR_ID and MCAT fields. Then update the MCAT levels in Excel (or equivalent spreadsheet program) and re-import them into DPO. For help on importing CSV files into DPO, see DPO Online help on 'Using the Import Module'.
- See also: DPO: Settings > Code Maintenance: Show Only: **Membership Type / Donor Screen** to modify the available membership levels within DPO
- Create membership levels in DonorShops to match any DPO membership levels you want to 'activate' in DonorShops. This is done via the DonorShops eCommerce > Membership menu item.
- When a Donor ID has been specified for a DonorShops Supporter Login account holder, DonorShops will pick up the current membership level from DPO for the DonorShops Supporter Login account holder each time they log in.
- When a site visitor purchases a membership level they already have (i.e.; renews their membership), DonorShops will extend their membership expiry date by the Duration (Days) value set for the membership category.
- When a site visitor purchases a membership level they do not currently hold (e.g.; a new membership or change in membership level), the new membership level will be effective immediately and the expiry date will be set to **today's date** plus the Duration (Days) value.

DonorShops SHOP Membership Levels

You can create DonorShops SHOP membership levels that are independent of (and ignore) the membership levels in DPO. **This is only available if your DonorShops site is NOT configured to synchronize memberships with DPO**

Membership Administration

Membership Levels

Use this screen to create and edit membership levels.

Membership Levels + Add Membership

50 records per page Quick Search:

Sequence	Code	DP ID	Members
4	Basic DPO Members	BASIC	1
1	Bronze DPO Members	BRONZE	2
6	Elite SHOP Members		0
3	Gold DPO Members	GOLD	1
99	non members	NM	0
5	Platinum DPO Members	PLAT	0
2	Silver DPO Members	SILVER	0

Showing 1 to 7 of 7 entries Previous **1** Next

Selecting an existing membership level or clicking on Add Membership takes you to the View/Edit Membership Level screen:

View/Edit Membership Level ✓ Save ✗ Delete

General

Sequence

Name

Description

Apply Promo

Default Page (Url)

Duration (Days)

The rest of the screen is shown below and highlights your ability to control access to pages, categories and products for each membership level.

Notes:

- If you check the box for a page, product or category, it will no longer be visible to site visitors unless they are logged in with the selected membership level
- Making a Category members-only, stops the category from showing, but any public products can still be found in the Search bar or if a person knows the direct link.
- To stop people from being able to search for a product or arriving there via a link, check the product name as well.
- If someone tries to access a members-only page, product or category without logging in, they will be automatically redirected to the Login page.
- You can assign membership durations of up to 9999 days to allow for long-term recurring memberships. E.g.; 9131 days is 25 years.
- If you have marked a page, product or category as members-only for one membership category, you would need to select the same checkbox for any other membership categories who should be able to see this page, product or category. **A marked product/page/category item will only be visible/searchable to the membership category or categories that have a Secure Content checkbox selected.**

Use this screen to

- enter the membership level name,
- connect it to a promotional code discount level that will be automatically applied whenever the logged in member makes purchases
- specify a landing page for this membership level
- specify the duration of the membership
- Assign a specific PROMO code level for this membership level. Discounts associated with this promotional code level will automatically be applied to any purchases made by a logged in member with this membership level without having to enter any Promo Code value in the cart.
- link this membership level to a membership level that exists **in your DPO system** by inserting one of the **CODE** values from your **DPO Settings > Code Maintenance > Membership Levels / Donor Screen** into the DonorPerfect Level field in your DonorShops View/Edit Membership Level screen:

Show only Membership Type / Donor Screen Go Export to Excel

Hide Inactive Codes

Share code with - NO FIELD SHARED - ?

Reciprocal Relationship? Save

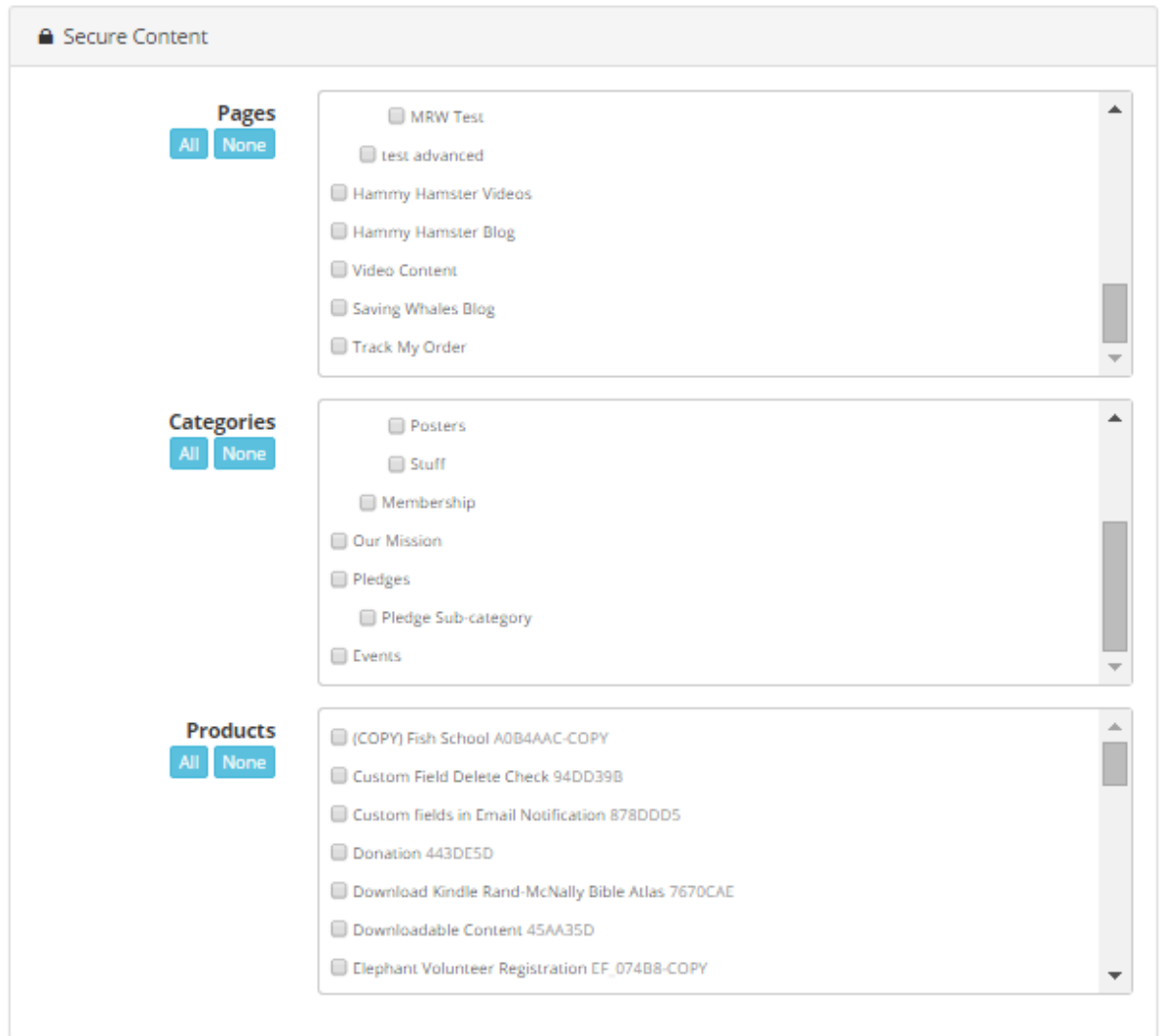
Add

	Field Name	Code	Description
Edit	MCAT	BASIC	Basic Membership
Edit	MCAT	BRONZE	Bronze Member
Edit	MCAT	GOLD	Gold Member
Edit	MCAT	NM	Non Member
Edit	MCAT	PLAT	Platinum Member
Edit	MCAT	SILVER	Silver Member

To link a DonorShops membership category to the corresponding DPO membership category, use the DPO CODE value

Secure Content Section

This is where you control any pages, category items and/or product items that will be available to this membership level. Items you specify here will no longer be visible to the general public:



Membership Landing Pages

When you set up your membership levels, you can specify a landing page for each membership level. When the user logs in, they will be taken to this landing page where you can tell them how much you appreciate their support and tell them about what you are doing right now as an organization because of the help they are providing and also tell them about any special discounts they can receive. This page is also where you can put in links to members-only products that don't appear in any product categories yet – so they could, for example, register for an event before the general public sees the event registration item.

To set this up:

- Create a DonorShops page that is online but where the Visibility is 'Hidden in website navigation' for each membership level. Add your content to this page. Also, see Special Membership Codes below if you want to have the page welcome them personally and tell them their membership level and expiry date.
- use the Default Page (URL) field that appears in the View/Edit Membership Level screen and paste in the appropriate membership landing page URL for each membership level.

Default Page (Url):

The logged in user can return to their membership landing page at any time by clicking on the **Welcome {Name}** link.

Here is a sample landing page showing Special Membership Codes to make the page personal to the logged in member:

This is the Silver Member Login Landing Page.

Welcome [member value="first_name"] [member value='last_name']!

We value our [member value='membership_name']. Your ongoing support helps us to save more whales.

[member value='membership_name'] receive the following promotional discounts:

15 percent off on all Books

15 percent off on all Posters & Stuff

15 percent discount on all Theatre events

Your membership_expires_on: [member value='membership_expires_on']

Members Only News!

[display_feed name='Members Only Blog']

You can also create other pages that are members-only. If they are listed in your page menu structure, the corresponding menu items will only be visible when a member with a membership category that has access to the page is logged in. You can also create direct links in your member landing pages to other members-only pages by just putting links or linked images into your member landing pages.

Products that Sell Membership

To create a product that sells a membership level, select the appropriate membership level in the Membership field within the Stock & Price section of the product.

Stock & Price Variant

<p>Requires Shipping</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>	<p>Weight:</p> <p><input type="text" value="0"/> lbs</p>	<p>Is Default Variant</p> <p><input checked="" type="radio"/> Yes</p>
<p>Regular Price:</p> <p>\$ <input type="text" value="23.45"/></p>	<p>Sale Price:</p> <p>\$ <input type="text" value="0"/></p>	
<p>Quantity Left:</p> <p><input type="text" value="-10"/> </p> <p><small>Last update: 0 as of September 18th, 2011.</small></p> <p>Show File Download Options</p>	<p>Restock At:</p> <p><input type="text" value="0"/></p>	<p>Link to Membership:</p> <p><input type="text" value="Basic DPO Members"/> ▼</p>

For this drop-down to appear, you must have created at least one membership level in your DonorShops site.

Membership Duration

If you decide to sell membership levels as recurring gifts (Payment Type: Recurring Payment) in DonorShops, we recommend you set up the corresponding membership levels in DonorShops to have very long expiry dates - .e.g; 25 years. If you decide to sell membership levels as non-recurring (Payment Type: Add to Cart), set the membership duration to a standard value – e.g.; 365 days – and set your product 'Add to Label' to 'Membership Year(s)'. The reason for this is that in the non-recurring scenario, DonorShops will multiply the membership duration by the number of membership items purchased so that your site visitor can, say, purchase 3 years of membership and DonorShops would set the expiry date to 365 x 3 days from the purchase date.

Remember that if they are renewing an existing membership, the membership expiry date will be set based on the current expiry date of their existing membership. If they are changing their membership level or purchasing a membership for the first time, the membership expiry date will be set based on today's date.

Membership Cancellation

Membership expiry is checked every time the member logs in. If their membership has expired, they will still be able to log in but will no longer go to their previous member landing page and will not be eligible for any member discounts.

If you want to cancel somebody's membership, adjust their membership level and/or expiry date in your DPO system. You might do this if, for example, membership payments were being processed via a recurring membership and the member had stopped paying.

Special Membership Codes

You can insert these codes into pages. The typical application would be to use one or more of these in membership landing pages:

My SavingWhales Profile

My current membership level: Basic DPO Member
 My current membership expires on: 2014-10-14 00:00:00

If you have any questions or concerns about your Profile information or your membership status, please don't hesitate to contact SavingWhales Member Services at:

Text and images entered by your organization

1-xxx-nnx-xxxx

Use this Membership Profile Form to view and update your personal information in the SavingWhales database.

General

First Name:

Last Name:

Email:

Password: [Change Password](#)

Billing

Country:

Address:

City:

Province:

Postal Code:

Phone:

Shipping

[Same as Billing](#)

Country:

Address:

City:

Province:

Postal Code:

Phone:

[display_profile_form] code

Update Profile

Here are some examples you could paste into your member landing pages. Note: The codes are the parts you see in [square brackets]. The rest is just explanation.

User Related:

Welcome [member value="first_name"] [member value='last_name'] !

Your email: [member value='email']

Your membership_expires_on: [member value='membership_expires_on']

Available Codes:

Code	Notes
[member value="first_name"]	
[member value="last_name"]	
[member value="membership_name"]	The name of the membership category they belong to
[member value="email"]	
[member value="ship_first_name"]	
[member value="ship_last_name"]	
[member value="ship_address_01"]	


[member value="ship_address_02"]	
[member value="ship_city"]	
[member value="ship_state"]	
[member value="ship_country"]	
[member value="ship_zip"]	
[member value="ship_phone"]	
[member value="bill_first_name"]	
[member value="bill_last_name"]	
[member value="bill_address_01"]	
[member value="bill_address_02"]	
[member value="bill_city"]	
[member value="bill_state"]	
[member value="bill_country"]	
[member value="bill_zip"]	
[member value="bill_phone"]	
[member value="created_at"]	Date when their membership was created in DonorShops
[member value="membership_expires_on"]	Date when their membership expires based on creation date (above) and duration

Membership Codes in System Pages

The System Pages that relate to membership are: **Login, Forgot Your Password, My Profile, Register and My History**. You can add content into these pages such as the Special Membership Codes, additional text explanations, images and video.

My SavingWhales Profile

My current membership level: **Basic DPO Member** Membership Codes
 My current membership expiration: **2014-10-14 00:00:00**

If you have any questions or concerns about your Profile information or your membership status, please don't hesitate to contact SavingWhales Member Services at: **1-xxx-nnx-xxxx** 

Text and images entered by your organization

Use this Membership Profile Form to view and update your personal information in the SavingWhales database.

General	Billing	Shipping
First Name: <input type="text" value="Maya"/> Last Name: <input type="text" value="Angelou"/> Email: <input type="text" value="maya@angelou.com"/> Password: Change Password	Country: <input type="text" value="United States"/> Address: <input type="text" value="3240 Valley Road"/> City: <input type="text" value="Winston-Salem"/> Province: <input type="text" value="NC"/> Postal Code: <input type="text" value="2810625"/> Phone: <input type="text" value="205-555-1212"/>	Same as Billing Country: <input type="text" value="United States"/> Address: <input type="text" value="3240 Valley Road"/> City: <input type="text" value="Winston-Salem"/> Province: <input type="text" value="NC"/> Postal Code: <input type="text" value="2810625"/> Phone: <input type="text" value="205-555-1212"/>

[display_profile_form] code Update Profile

Available Codes:

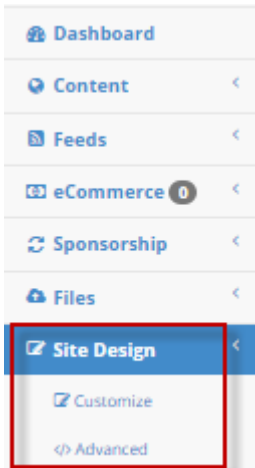
[member value="first_name"]
 [member value="membership_name"]
 [member value="email"]
 [member value="ship_first_name"]
 [member value="ship_last_name"]
 [member value="ship_email"]
 [member value="ship_address_01"]
 [member value="ship_address_02"]
 [member value="ship_state"]
 [member value="ship_zip"]
 [member value="ship_country"]
 [member value="ship_phone"]
 [member value="bill_first_name"]
 [member value="bill_last_name"]
 [member value="bill_email"]
 [member value="bill_address_01"]
 [member value="bill_address_02"]

[member value="bill_state"]
[member value="bill_zip"]
[member value="bill_country"]
[member value="bill_phone"]
[member value="created_at"]
[member value="membership_expires_on"]

Site Design

The Site Design menu section contains two menu items:

- **Customize:** Use this section to set up and adjust your site Buckets (front page feature blocks, etc.) and social connection links
- **Advanced:** Do not make any changes to items this section unless you have website development expertise. Contact theteam@donorshops.com for assistance modifying content in this section. DonorShops assistance making changes or repairs to content in this section is a premium chargeable service.



Customize

These are items that a typical DonorShops client organization will use to set up various site variables.

Buckets

Buckets are found under Site Design > Customize.

A Bucket is a container of text or HTML code that you can reference from multiple places on your DonorShops site. The benefit is that if something changes in the content, you only need to update it in one place.

- If Buckets are disabled on your DonorShops system, you will not see this menu item.
- Buckets cannot contain other shortcodes
- Buckets can be used in Layouts and Pages but not in Products

The primary use of Buckets in DonorShops responsive layout sites is for

- the three feature blocks (featured_product_1/2/3)
- the Call To Action block on the front page.
- The Footer information

- Additional customer site theming options may be added to this section...

Once you have created one or more buckets, you can invoke the specified bucket with this code:

Example: A bucket called **Contact Info:**

Buckets



Could be made to appear on pages, in Layouts or within product Page Content fields by using this code:

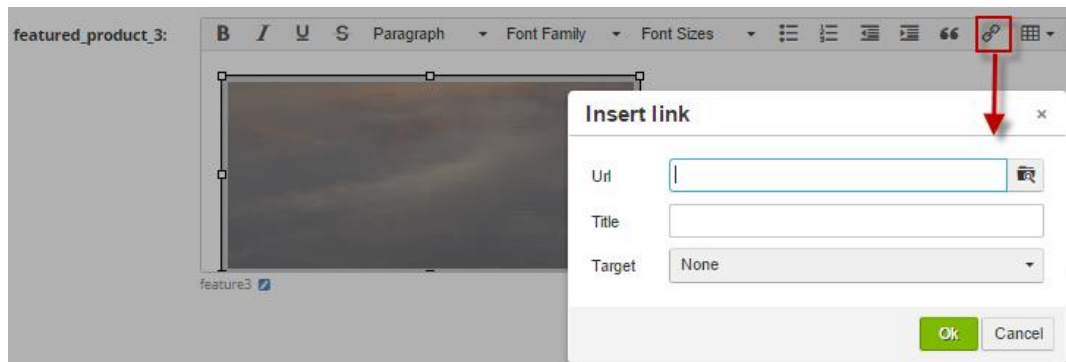
[bucket name='Contact Info']

Feature Buckets

Found in DonorShops Responsive Layout sites.

We recommend you use an image width of 370px for all your Feature Buckets and also suggest you make all three images the same height. DonorShops can work with different Feature Bucket image sizes, but they will look better if they are all the same size.

You can Link each of these to content in your site – e.g; a category or product or page – using the link icon (highlighted in red box below).



Feeds

You can use a feed to allow you add a blog to your site, list video content or audio files. There are examples of Blog and Video Content feeds in <http://demo.donorshops.com>

To create a feed for a blog, audio feed or video feed all involve the same process:

Create the Feed:

- Under Feeds, click Add Feed
- Select either Blog, Audio Feed or Videos
- Give the feed a Name that doesn't use any special characters (e.g.; avoid &, /, etc.). Make careful note of the name and copy it into a text editor such as Notepad so you can insert this exact feed name later. In our example, the Feed name is **Hammy Hamster Videos**
- Put in a copyright notice if desired.
- If this is going to be a Podcast feed, you will need to click 'More Options' and fill in the additional fields. There is a help link here to give you more information on how to fill in Podcast fields.
- Save the feed.

Create the Page where you will view the feed:

1. Create a Page and set the type to Normal HTML. You can leave the page offline for now. Enter your feed name (we called ours by the same name as the feed name: Hammy Hamster Videos).
2. Now, enter the displayFeed link in the main editing window in exactly this format. In this example, the feed name is **Hammy Hamster Blog**. You would substitute the name of your feed.

[display_feed name='Hammy Hamster Blog']

- Notice the square brackets at the beginning and end []
 - Notice the single space between display_feed and 'name'
 - Notice the single quotes at the beginning and end of the feed title.
3. You can place other text above or below this displayFeed link
 4. Set the page status to Online
 5. Save your page

Add Posts to your Feed:

1. Select the feed under the Feeds menu item and use Add Post to add your blog/audio/video feed items.
- If you are entering video feed items, click on the HTML menu item at the top of the Body field and paste the <iframe> embed code from the video and paste it in.

You should now see a new menu item at the top of your DonorShops site the the feed name. When you click on it, you should see the feed and the post you just created.

Custom Field Gift UDF Links

You can have up to **fifteen (15)** custom Gift UDFs (User Defined Fields) set up in your DonorShops system.

Gift UDFs are fields you create on the gifts screen tab of your DonorPerfect Online system. If you are not sure whether a field is a gift UDF or not, please contact DonorPerfect support for clarification & confirmation.

These fields show up as additional fields under the DPO Integration area in your product details screen in JPanel.

Refer to DPO Online help for information on how to setup custom Gift UDFs.

DonorShops Specific

Purchase Type: Hosted Event | Department Code: Promotions

Participant Names: Jim, Sue, Carol

Regular Meals: 2 | Vegetarian Meals: 1

You can now link Custom Fields to these custom Gift UDFs!

Custom Fields

#	Type	Label	Required	Map to UDF	Options*
1	Text	Number of Standard Meals	Not Required	Regular Meals Qty	
2	Text	Number of Vegetarian Meals	Not Required	Vegetarian Meals Qty	
3	Big Text	Attendee Names	Not Required	Participant Names	
4	Select Box	Seating Preference	Not Required	(None)	Close to band Close to head table Close to door Close to food

Add Input Field

*Each select option must be on its own line.

- Possible Applications:
- Meal Preference fields in your DPO system that record the number of people in your party who want regular meals, vegetarian meals, etc.
- A 'Where did you hear about us?' custom field that is linked back to DPO so you can run a report to retrieve these directly from DPO
- A 'Give In Honor Of' field on a DonorShops product that links back to a custom Gift UDF field in your DPO system so you can have non-managed tributes in your DPO system (search on 'tributes' in this support site to learn more about the difference between managed and non-managed tribute items)
- A select list of people's names that link back to a custom Gift UDF field in your DPO system. This would allow people to pick the name of the person they want to sponsor with their gift!
- A linked 'Send me the newsletter' checkbox field that you can use in a DPO Constant Contact dynamic mailing list filter
- A linked 'Participant Names' text field so when a family signs up for an event, DPO has the list of all the family members
- You can use the same Gift UDF over and over again in different products – e.g.; a 'Participant Names' field that gets used by many different DonorShops event items but you cannot use a

particular Linked Gift UDF field more than once within a product..

NOTES:

- If you are using a linked custom field that connects to a DPO Gift UDF with a Data Type of 'Number', we strongly recommend you use a **Select Box with the number choices filled in**. This will prevent people from typing text into the field – e.g.; 'two' instead of 2 as DPO will reject non-numeric text entries in fields that are set up with a Data Type of 'Number'
- If you are linking to a DPO Memo field, use the Custom Field type of **Big Text**
- If you are going to link to a DPO Gift UDF with a data type of 'Date', please make sure your custom field Label text shows the site visitor the date format that DPO .
 - The required format is **mm/dd/yyyy**

Advanced Site Design Tools:

The layout of your DonorShops.com eCommerce platform screens can be modified from the standard layout. These functions require web site coding proficiency and are accessed through the Site Design menu items.

If you are not an experienced web developer, do NOT make any changes to Site Design parameters. Repairs to Layouts, Templates, Buckets, Style Sheets or Java Script are a chargeable site design services.



IMPORTANT: Before you make any modifications to the Style Sheet or any of the layouts, copy the contents of the style sheet and each layout and save these in a file on your computer so you can go back to the originals if necessary.

Style Sheet

The style sheet should only be modified by web developers who have a clear understanding of CSS style sheets.

Tip: To remove the search filter from the category list pages, modify the line in the style sheet that begins with

```
.c .filter
```

Add the style attribute: `display: none;`

NOTE: DonorShops cannot be responsible for repair or maintenance of style sheets that have been modified by the client. Any work to repair or restore style sheets that have been modified by the client organization or their representatives will be performed at the current DonorShops Creative Services rate.

Customize your Goal Widget

If you are a web developer and want to modify the look of the goal oriented widget for your DonorShops client, pasted these lines into the bottom of the DonorShops style sheet (after saving a copy of the

unmodified style sheet) and then modify as required:

```

/* goal */

.goal_wrap { border:0px; width:550px; height:45px; display:block;
margin:20px auto; position:relative; }

.goal_wrap .goal_bar { position:absolute; top:0px; left:50px;
width:450px; height:20px; display:block; box-shadow:1px 1px 3px #333;
-webkit-box-shadow:1px 1px 3px #333; -moz-box-shadow:1px 1px 3px #333;
}

.goal_wrap .goal_bar_bg { position:relative; top:0px; height:20px;
left:0px; width:100%; background:#a8a8a8
url('//code.donorshops.com/bg_highlight.png') repeat-x center center;
display:block; }

.goal_wrap .goal_bar_progress { position:relative; top:-20px;
height:20px; left:0px; width:0%; background:#035203
url('//code.donorshops.com/bg_shadow.png') repeat-x center center;
display:block; }

.goal_wrap .goal_label { position:absolute; top:27px; left:50px;
margin-left:-20px; text-align:center; font-size:10px; color:#666; }

.goal_wrap .goal_label.goal_label_0 { left:50px; }
.goal_wrap .goal_label.goal_label_20 { left:140px; }
.goal_wrap .goal_label.goal_label_40 { left:230px; }
.goal_wrap .goal_label.goal_label_60 { left:320px; }
.goal_wrap .goal_label.goal_label_80 { left:410px; }
.goal_wrap .goal_label.goal_label_100 { left:500px; color:#000; font-
weight:bold; }

.goal_wrap .goal_label_progress { text-align:right; text-shadow:-1px -
1px 0px #000; color:#fff; font-weight:bold; position:absolute;
top:2px; margin-left:-124px; width:120px; }

.goal_wrap .goal_label_progress.outside { text-align:left; color:#c00;
margin-left:4px; }

.goal_wrap.loading .goal_label_progress { color:#999; text-shadow:1px
1px 0px #fff; font-weight:normal; }

.productfields-required-asterix { font-weight:bold; color:#f00; }

```

Layouts

The default Layout sheets for DonorShops sites are:

- **Splash:** This is the front page of your DonorShops site
- **Content:** Any pages you build into your site
- **eCommerce Pages:** Category lists and individual product pages

Layout sheets control the appearance of header and footer information displayed on each of these pages. The header controls everything down to the top of the large white background area displaying category/product/page information. The footer element controls everything that follows this area. The behavior of the white background area in the middle of the page is controlled by the DonorShops

engine and is not currently adjustable via Layout sheets with the exception of items specifically mentioned within the Style sheet (e.g.; the filter example shown above).

Shortcodes

Shortcodes are active elements within layouts that are controlled by the DonorShops engine and are accessed via code values contained within square brackets. They invoke pre-built DonorShops functions.

For example, the following code appears in the Splash layout:

```
<div class="sMenu">
  <!--<ul class="jc-ddMenu">[list_pages]</ul>!-->
</div>
<div class="mMenu">
  <ul class="jc-ddMenu">
    [list_categories]
    <li class="highlight"><a href="/products/featured">Featured</a></li>
    <li class="highlight"><a href="/products/new">New Arrivals</a></li>

  </ul>
```

- The [list_pages] shortcode tells DonorShops to show the top level page menu items that appear on the homepage
- The [list_categories] shortcode tells DonorShops to display the top level category names on the homepage
- Contact theteam@donorshops.com to get a full list of available shortcodes

Content Templates

These use the phalcon Volt Template Engine. Contact DonorShops for assistance before making any attempt to modify these. Assistance with modification of (or repairs to) Content Templates is a chargeable service.

Security

Your customer's credit card information has the same high level of security and protection as all your DonorPerfect EFT information as it is processed by exactly the same SafeSave Gateway and payment processor system.

Your DonorShops.com site is protected by **Comodo Essential SSL** site security which includes Microsoft Authenticode technology and Comodo's 2048 bit Code Signing Certificate.

Also, your site information is automatically backed up by DonorShops.com on a daily basis and are stored both as local backups at DonorShops.com and also at the LIGHTWAVE DATA CENTER in San Diego, California.

Advanced Settings

This page is only available to JPanel users with the **Can Manage Admin** permission option checked.

WARNING: Changes made to this page can affect the operation of your DonorShops site. Do NOT make any changes without first printing a copy of the unmodified values (right-click and select 'Print' in your web browser).

Field	Notes
Organization Name	This is your FULL organization name. It is referenced throughout the system in email merge codes and shortcodes.
Organization Name (Short)	This is the abbreviated version of your organization name. It is also referenced in email merge codes and short codes.
Default Page Title	Page titles show as page name – default page title; e.g; “Support Us – SavingWhales ”
Site URL	The URL of your DonorShops site. If you have a custom domain or subdomain set up for your DonorShops site, put the full URL of the custom domain/subdomain.
Custom Domain Migration Mode	Set this to Enabled if you want to be able to access your DonorShops site via the actual location (____.donorshops.com) as well as the custom domain/subdomain
Google Analytics ID	You may enter a Google Analytics ID number if you would like to track traffic on your DonorShops site. E.g.; ‘UA-xxxxxxx-y’
Facebook Admin ID	Instructions on how to determine your FB Admin ID are on the DonorShops support site. Search on ‘facebook’ and look for the article titled ‘How to: Determine my Facebook Admin ID’
Twitter Account Name	Enter your twitter account name. Do NOT include the ‘@’ symbol
Cart Label	
Province/State	Sets whether the word that is displayed in the cart for the province/state field.
Product Filter Label	Sets the label assigned for the filter dropdown that is displayed when viewing a category of products. E.g.; Filter, Author, Project Area, etc. Also controls the label assigned to the filter field within each product.
Category Images	Enables/disables category images
Default Country	Controls the default country value displayed in the cart
Force Country	Normally blank, but you can set a country code here if you only want to allow orders from one country (e.g.; US, CA, AU, etc.) Full list of

	countries can be found in DPO > Settings > Code Maintenance > Country / Donor Screen. Use the CODE value, not the Description value.
Recurring Payment Day of Month Options	Select the date(s) in any month that you want to allow people to choose for monthly recurring pledges
Recurring Payment Day of Week Options	Select the day(s) of the week that you want to allow people to select for weekly or bi-weekly recurring pledge payments
Min Days to First Recurring Payment	This value is used for monthly pledge payment start date calculations. DonorShops will take an immediate pledge payment when the person completes their order, but the calculation of when the NEXT pledge payment start date will be adjusted so that it does not happen within the number of days you specify here.
Show 'Create an Account'	Controls whether the 'Create an Account' fields show up in the cart.
eComm: Order Fulfillment	Allows you to define the packing slip header that is used when you generate DonorShops Packing Slips from orders received.
SafeSave Username, SafeSave Password	<p>WARNING: The SafeSave username and password values must be correct for DonorShops to process financial transactions.</p> <p>We recommend using a username and password that is secure. Example.;</p> <p>User: r4k56imgbaab003ajf8mn34k5h</p> <p>Pwd: 4mjlo689dnk4l6j6jmt4ll6n45itmr4</p> <p>... not these actual values, but something nobody is going to guess at.</p>
Card's Accepted	<p>WARNING: Do not enable payment methods unless you have confirmed that your SafeSave gateway and payment processor will accept the card type.</p> <p>For example, you have to complete a separate application form through your SofterWare account representative to allow you to accept payments via American Express. Do not add American Express in this field unless you have actually done that - otherwise your site visitors will get their AMEX cards rejected.</p>
DPO Username, DPO Password	<p>WARNING: The DPO username and password values must be correct for DonorShops to communicate with your DPO system.</p> <p>If you have changed the password for the DPO account that DonorShops is using to communicate with DPO, this is where you update the password.</p> <p>We recommend using a username and password that is secure. Example.;</p> <p>User: r4k56imgbaab003ajf8mn34k5h</p> <p>Pwd: 4mjlo689dnk4l6j6jmt4ll6n45itmr4</p> <p>... not these actual values, but something nobody is going to guess at.</p>
Currency	Enter the currency code value corresponding to your default currency. E.g.; USD, CAD
Sync Memberships	If your DonorShops site is set up for membership functionality (DonorShops UNLIMITED), then this should be set to YES to allow

	DonorShops to retrieve the logged in account holders current membership level.
Allow Account Users to Update DPO Profile	Set this field to yes if you want your supporters 'My Profile' updates to change their donor information in DPO.
Use NOCALC Field	<p>If set to Yes, the JPanel product detail screens will show an additional 'NoCalc' field which defaults to 'N' (or blank) but can be set on a per-product basis to 'Y'. If this value is set to 'Y' for a product, then when the product is ordered, the DPO NOCALC gift field will be set to 'Y' for the gift. This field causes the gift to be <u>excluded</u> from DPO calculations.</p> <p>Contact DonorPerfect support for more specific information on the effect of setting the DPO NOCALC field to 'Y' on DPO gift calculations.</p>

Site Check

This test will check and confirm your site settings, connections and email notifications are set up properly:

Step	Notes
Place a \$5.00 (or higher) order via your DonorShops site	<p>You will need to use a legitimate name, address and credit card for this. Your order should include an email address that you can access.</p> <p>In previous versions, a \$1.00 purchase would suffice, but DonorPerfect has increased the default minimum acceptable purchase amount to \$5.00 for security reasons. This provides better security for your organization against foreign hackers who try to test credit cards by running \$1.00 purchases. If you want the default changed back in DonorPerfect, contact DonorPerfect support.</p>
Confirm that the order appears in your DonorShops JPanel Orders list	<p>If the order was unsuccessful, check your Advanced Settings SafeSave Username and Password. These must be correct for an active SafeSave account on your DPO system.</p> <p>You can access and update your SafeSave user/password information through the DPO SafeSave payment user interface. Contact your DonorPerfect support representative if you need assistance with this.</p>
Open the order and note the DonorPerfect Donor ID and Gift ID(s).	<p>You can click on these links to retrieve the order information directly from DPO on the order details page within DonorShops.</p> <p>If the Donor ID and Gift ID are showing as zero with a 'Resynch to DonorPerfect' link, this indicates that there is a problem with your DPO Login Username/Password.</p> <p>Double check your DPO login credentials by logging into your DPO user interface with the same credentials. If you can't log into DPO with these credentials, you will need to fix them in DPO and then update your DonorShops DPO Login information in the Advanced Settings DPO Username and/or DPO Password fields.</p>
Confirm that you received the Order Received: To Customer email	See JPanel Email Notifications page for listing of the various emails.
If you had entered email address(es) in the Email Notify field for the product you purchased, you should have also received a 'BCC' of the customer email at this address (or these addresses)	The Email Notify field is in the DonorShops product
If you specified an Order Received: To Admin email address, you should have also received an order notification email at that address	See JPanel Email Notifications page for listing of the various emails.

<p>If you ordered an item that includes downloadable content, the purchaser should have also received the Order: eDownload Links email</p>	<p>See JPanel Email Notifications page for listing of the various emails.</p>
<p>Note the confirmation number in the DonorShops order. This shows in the Confirm No. <i>From Payment Gateway</i> field.</p>	
<p>Log into DPO and go to App Links: Processing Gateway</p>	
<p>In the SafeSave payments window, select Reports</p>	
<p>In the Search Transactions area (lower portion of reports screen), paste the Confirm No. into the Transaction ID field</p>	<p>You should see the transaction in the resulting report.</p>
<p>This completes initial testing.</p>	<p>You have now confirmed that orders are processed properly by the SafeSave gateway and sent to your DPO system. Also, that the customer and your organization are receiving appropriate email notifications.</p>

Support

Your primary support resources are:

- **The DonorShops Service Request Portal accessed by clicking on the Help link in your DonorShops JPanel menu**
- This User Manual
- You can also contact theteam@donorshops.com with non-support related inquiries



Our top priority is customer service and experience. We always do our best to ensure every client has what they need to be successful with DonorShops.

The DonorShops team is committed to making sure your DonorShops site functions as described in your DonorShops User Manual. DonorShops provides support for this Core Functionality at no charge on a 24 x 7 basis via the DonorShops Service Request Portal.

Please note that Core Functionality support does not include the setup, administration or updating of site specific content (e.g.; banners, products, categories, etc.) as the setup and administration of site specific content is the responsibility of the client.

If your organization would like additional training, coaching or help with site specific content, we are happy to provide this type of assistance via the premium service options available through the DonorShops Service Request Portal.

The DonorShops Service Request Portal can also be accessed via this link:

<http://support.donorshops.com>

Please Note:

We are doing our best to make sure that support requests are handled as quickly and efficiently as possible. An important part of this is having all support requests submitted via the DonorShops Service Request Portal.

Emails sent to theteam@donorshops.com will be treated as general enquiries. Emails to other staff email addresses will be treated as personal emails, not as support requests.



The setup, administration and updating of site specific content is considered to be training. In other words, training is the explanation and/or demonstration of functionality described in this User Manual. If an organization would like assistance because they are unfamiliar with how DonorShops works, we are happy to offer training related services through the DonorShops Service Request Portal.