Text to Donate Activity Design

The Text-to-Donate activity is essentially the core activity in MobileCause. Once you design a Text-to-Donate activity, you can design just about anything in MobileCause.

The Text-to-Donate activity is a Donation form that can be accessed via a web link (including a short link - usable anywhere, but specifically for mediums, like texting and Twitter, where every character is a premium), a QR code that you can add to your marketing materials, including physical mail, and through Texting.

The Text-to-Donate activity makes giving as easy as possible.
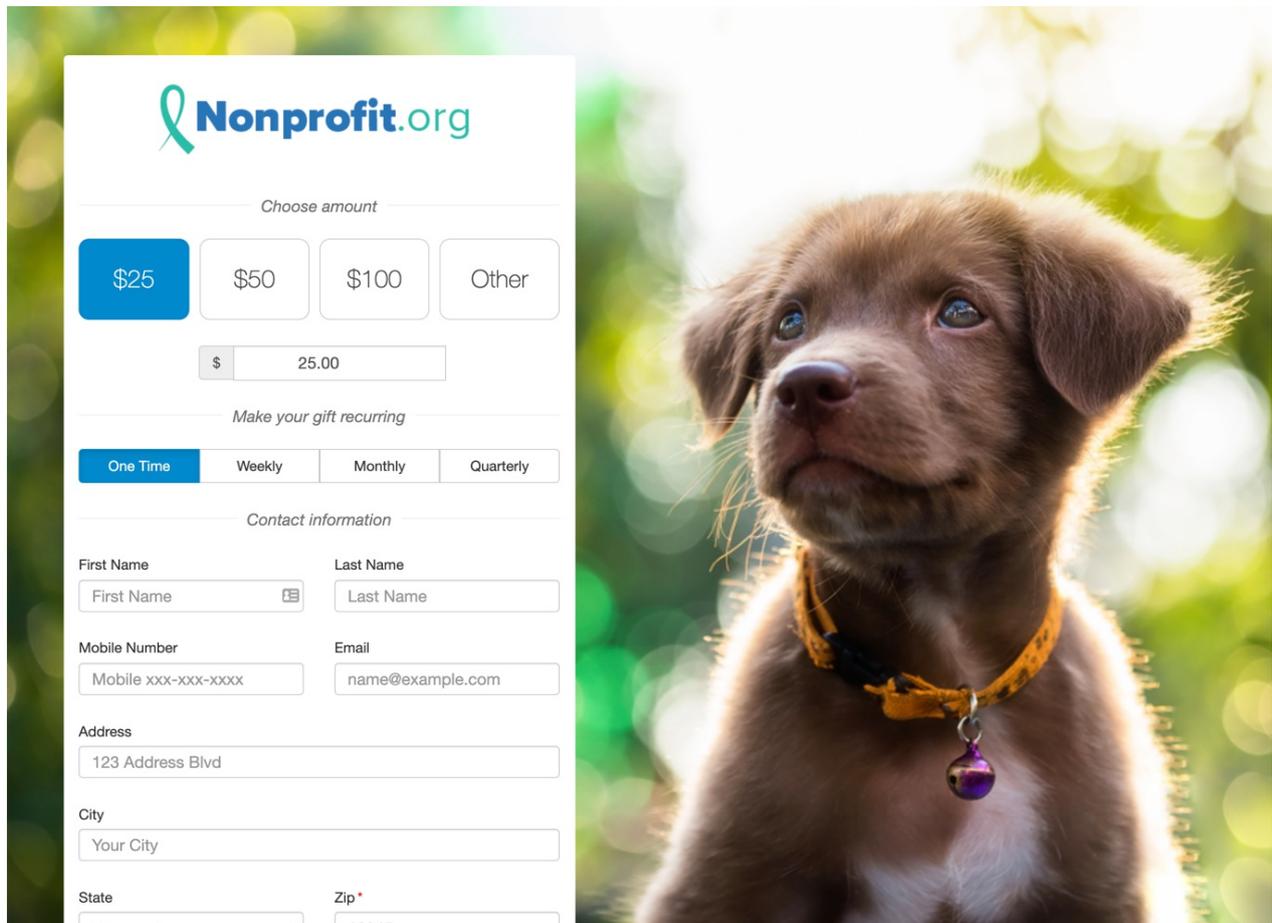
Individuals who text your keyword immediately receive a text message reply with a secure link to a PCI-compliant mobile donation page. With just a few clicks, individuals can make a one-time or recurring gift to your organization.
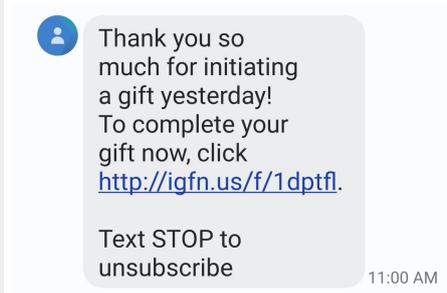
> Thanks for supporting MCAcademy.
>
> Click here to complete:
> https://igfn.us/l/Cv0ksk
>
> Msg&data rates may apply. 4 msgs/mo. Text HELP for help, Text STOP to end

Individuals that do not complete their donation form automatically receive three TCPA-compliant reminder texts to encourage and optimize fulfillment.

Thank you so
much for initiating
a gift yesterday!
To complete your
gift now, click
http://igfn.us/f/1dptfl.

Text STOP to
unsubscribe
11:00 AM

Text to Donate Quick Start Video

Watch this video to get started or scroll below for the written version of the process:

CREATE A TEXT TO DONATE ACTIVITY

To create a Text-to-Donate activity, you need to have a Campaign already created. If you do not have a Campaign, or want to add this activity to a new one, click on New Campaign to create one and follow the process on creating a campaign, as outlined here.

Then create a new activity from the New Activity button on the dashboard on the right or hover you mouse over the Campaign Tile and click on the Plus icon.
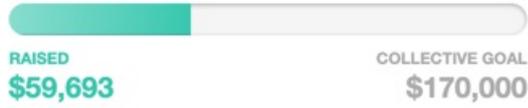
In the pop up, open the Fundraising Activity section and select Text to Donate.

SET UP YOUR KEYWORD

1. Either type in a new **Keyword**, or select an existing one to reset and start from scratch.
   - For more information about reusing, moving or reassigning a keyword, click here.
2. Select a **Campaign**.
   - If you create your activity from the Campaign Tile or within the campaign, it automatically selects the campaign for you.
3. Choose what **Shortcode** you would like to use: 41444 or 91999.
   - The shortcode of your keyword is the phone number that the donor will text your keyword to. We give you two options to choose from. Since all MobileCause customers share the same two shortcodes, keyword possibilities can be limited. This allows there to be two of the same keyword to exist, just on separate shortcodes.
4. Click Save to create your activity and start it.

Detailed Set Up Your Keyword Info

SET UP YOUR ONLINE (Gift/Donation) FORM

The Online Form is where all donors will be directed to when placing their donations. This is where you will select what information you collect and how the general donor experience will feel. As you edit the donation form, you will see a mobile preview of the changes you make to the right of the editable sections. You can also preview the desktop and tablet views as well.

Text to Donate Text to Donate *(default)*

Manage Sections ▾

Logo and Branding

Suggested Amounts

Recurring Donations

Contact Information

Payment Information

Footer Message

Form Submit

Receipts and Notifications

Embed Code

Logo and Branding

Change the look of your form with a logo specific to this activity. You can add a background image or color and move the placement of the form on the webpage.. You can change the overall color scheme of

the form by changing the Button Color by entering a hexadecimal color code, or clicking the color square to use the circle and square to set the color.

Detailed Logo and Branding Info

Suggested Amounts

The Suggested Amounts section gives you three donation buttons and an Other button to provide your supporters a choice of amounts to donate. Select an appropriate range of amounts for your activity and set the Default Donation amount to one of the three buttons.

Detailed Suggested Amounts Info

Recurring Donations

The Recurring Donations section gives your donor the option to set up their donation as a recurring gift. The form has room for four choices, but there are five options to choose from: One Time, Weekly, Monthly, Quarterly and Annually.

You can choose the payment type to cover different giving strategies.

Usually you want to leave Default Frequency as One Time, unless everything about this activity is designed with a recurring donation in mind.

Lastly, your one time donors can be prompted to change their donation to recurring with the Encourage Recurring Donations options.

Detailed Recurring Donations Info

Contact Information

The Contact Information section is where you collect the information about your donor, such as their name, mobile number, email address and physical address. We highly recommend that you select one or more methods of communication as a required item so you have at least one way to reach out to your supporters in the future.

> Making the email address a required item will make sure that your donors will get their receipt for their donation emailed to them.

Detailed Contact Information Info

Payment Information

The Payment Information gives you options for the payment transaction. If you have PayPal connected to your account, then you can choose a default payment method. You can choose to give your donor the option to cover the payment processing fee with their donation and choose to remain anonymous on public facing pages, such as the Fundraising Thermometer and the Event Page.

Detailed Payment Information Info

Promotional Codes

Promotional Codes aren't used on a Donation page. They provide discounts for things like Ticketing or any other payment form. For more about the Promotional Codes, click here.

Footer Message

The Footer Message Section is a text box to add any last item before the donor submits their donation. It is not often used, which is why it is hidden by default. Remember to switch it to **Show** if you are using the Footer Message section.

Detailed Footer Info

Form Submit

The Form Submit section is the last section to personalize on your form that is visible on the form itself. The main function of the Form Submit section is to show the total donation and the SUBMIT button. Change the wording of the button to make it more personal.

Detailed Form Submit Info

Receipts and Notifications

The Receipts and Notifications section of your form configuration allows you to control the automated communication with your constituents. You can choose to use both texting (SMS) and/or Email. Both forms of notification are enabled by default.

Detailed Receipts and Notifications Info

Embed Code

Use the code in the Embed Code section to embed the form on a secure webpage on your site.

Detailed Embed Code Info

PERSONALIZE YOUR CONFIRMATION PAGE

The Confirmation Page thanks your donors for their donation and provides different calls to action for them. There are only two sections in the Confirmation Page:

- Content
    - This is where you can thank your supporters by name, let them know their payment has been billed and provide text, images and/or videos.
- Actions
    - Here, you can add buttons to direct your donors to other pages, such as a Volunteer Signup activity or just your website. You can also provide ways for them to follow you on different social media platforms and ask them to sign up to receive text or email messages from your organization.

Detailed Confirmation Page Info

SET FULFILLMENT MESSAGES

For those who have texted the Keyword but not actually completed their donation, they will receive up to three reminders to complete their gift. You can select which **Fulfillment Messages** you want for this keyword, by checking/unchecking each and clicking **Save**.

Detailed Fulfillment Info

SET UP YOUR FUNDRAISING THERMOMETER

Your organization can easily project this real-time thermometer during live events to build and maintain

momentum during the giving portion of your event. Mobile pledges appear live on-screen as the thermometer rises towards your goal.

When you first click on Fundraising Thermometer in the left categories, you will see your blank default thermometer like the one below. To design and customize your thermometer for the event, click here:
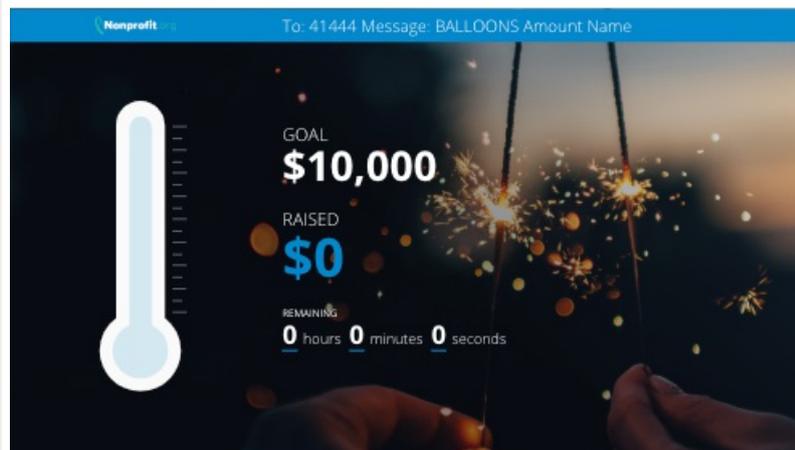
[Detailed Fundraising Thermometer Info]

Please note: due to different resolutions of this preview screen and the thermometer screen, there might be slight differences.

Viewing Your Live Fundraising Thermometer

The live version will open in a new window when you click **View Fundraising Thermometer** below the left menu inside the box titled **Display Links**. You can also access the Thermometers directly by going to **Events** > **Thermometer**. You can enlarge the thermometer page to Full Screen to display or project at your event by clicking anywhere on the page.

Your Fundraising Thermometer During the Event

Once donors text your keyword, a space, the donation amount, another space and their name – their donation will appear on the live thermometer and they will get a text to complete their donation. The link in the text will automatically redirect them to the donation page. On the donation page, the amount pledged appears as the donation amount.

All participants that do not fulfill their pledge receive three reminder texts. These reminders dramatically increase pledge fulfillment.