

betterworld

Your Complete Guide to BetterWorld's Donation Forms

This guide walks you through setting up and managing BetterWorld Donation Forms, customizing them for your website, and enhancing donor engagement to maximize contributions.

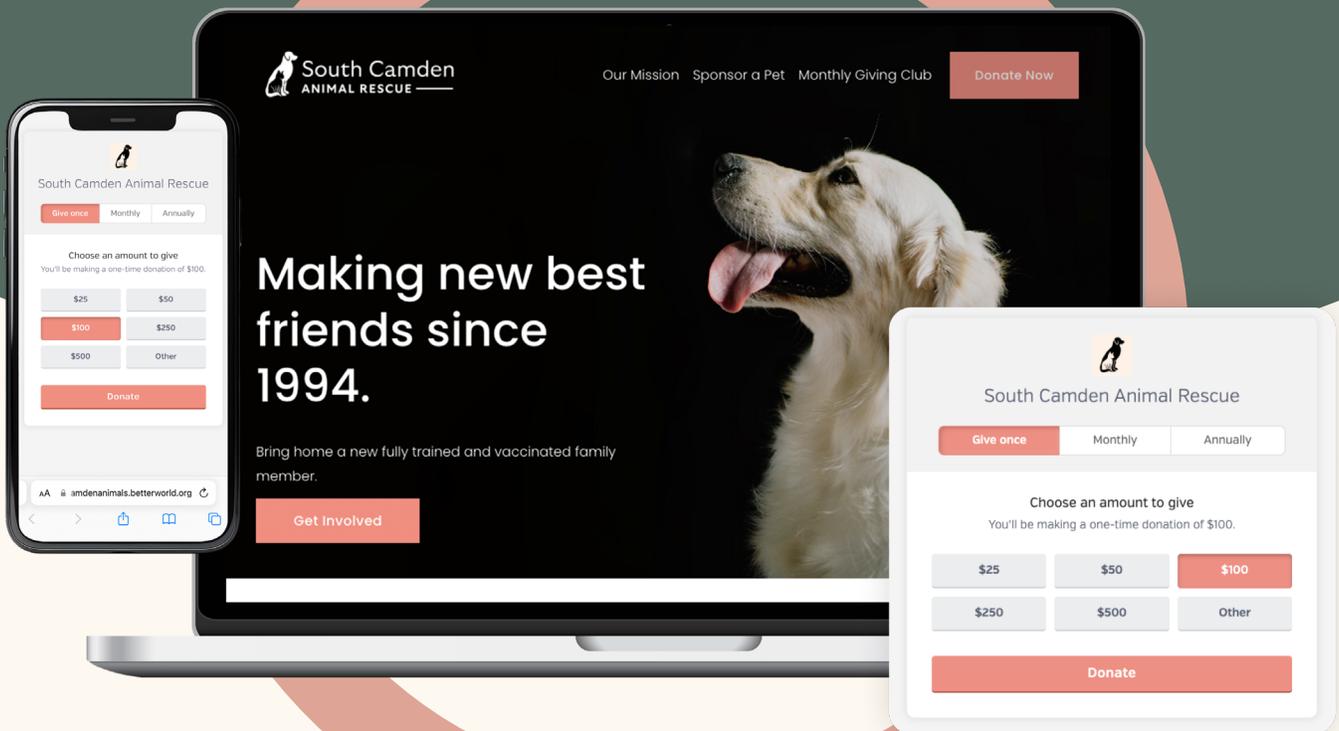


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Introduction

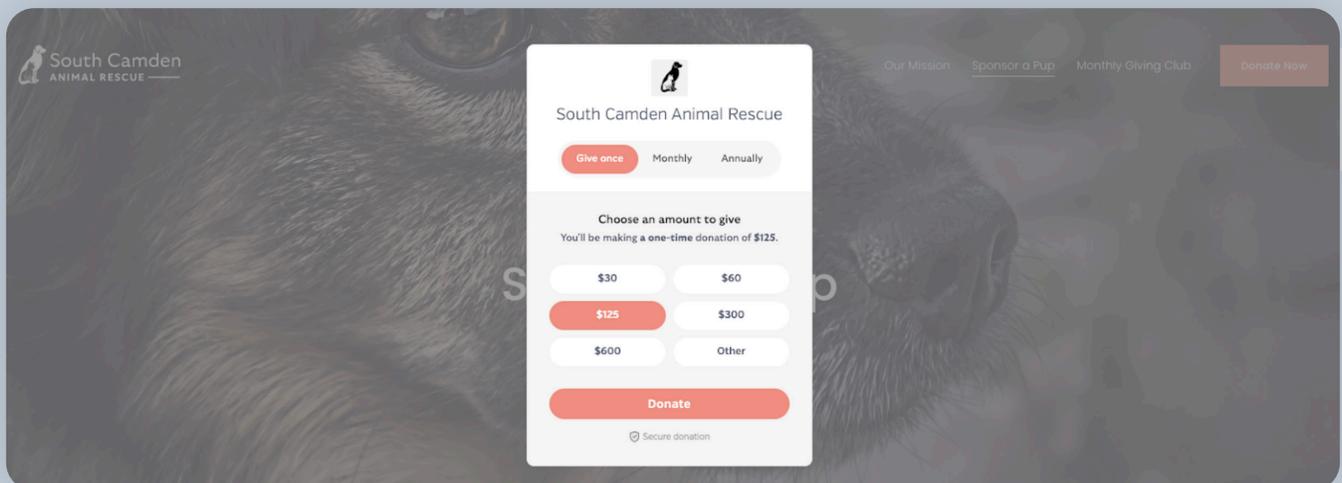
This guide makes it easy to set up and manage your BetterWorld Donation Forms. You'll learn how to create and customize forms, add them to your website, and engage donors effectively. It also includes tips on designing impactful forms, tracking donations, and withdrawing funds smoothly. Whether you're new to online fundraising or looking to improve your strategy, this resource helps you create a seamless and successful donation experience for your organization.

Choose the Donation Form That's Best for You

BetterWorld provides three types of Donation Forms, allowing you to choose the best fit—or use all three! Each form is designed to make giving easy for your supporters and help you reach your goals. With innovative and adaptable features, these forms enable nonprofits to boost fundraising success and provide a user-friendly donation experience that encourages consistent support throughout the year.

Pop-Up Donation Form

Pop-Up Donation Forms appear as a smaller window layered over your webpage, triggered by clicking a button. This form allows donors to give without leaving the page they're on, ensuring an uninterrupted, branded experience. Pop-Up Donation Forms are ideal for placement in high-traffic areas of your website, such as your homepage, footer, or sidebar, as well as at the end of blog posts or impact stories to inspire immediate action.



Embedded Donation Form

Embedded Donation Forms are integrated directly into your website, allowing donors to contribute without additional clicks or being redirected. They create a cohesive, professional look, making it easy for visitors to engage with your cause, while also building donor trust and confidence by keeping the entire donation process within your website. Embedded Donation Forms are ideal for high-traffic pages like your homepage, dedicated donation pages, and initiative pages to encourage targeted giving. They enhance blog posts, in-memory pages, thank-you pages, and the “About Us” page. This form provides a user-friendly donation experience that reinforces your organization’s branding.

Monthly Giving Club

Join our Monthly Giving Club and become a vital part of our mission to save and care for dogs in need. By committing to a monthly donation, you provide consistent, reliable support that allows us to plan and execute long-term rescue efforts, provide medical care, and ensure every animal we save finds a loving home.

As a member of our Monthly Giving Club, you will receive:

- **Exclusive Updates:** Get behind-the-scenes stories and updates on the animals you're helping.
- **Special Recognition:** Your name will be featured on our website and in our annual report as a valued supporter.
- **Insider Invitations:** Receive invitations to special events and meet-and-greets with the animals.

Your ongoing support makes a lasting impact. Whether it's \$10 or \$100 a month, every contribution goes directly to saving lives and making a difference. Join our Monthly Giving Club today and be a hero for these dogs all year round!

South Camden Animal Rescue

Give once Monthly Annually

Choose an amount to give
You'll be making a one-time donation of \$125.

\$30 \$60
\$125 \$300
\$600 Other

Donate

Secure donation

Linked Donation Form

The Linked Donation Form is a standalone page hosted by BetterWorld, customizable with appeals, videos, and background images for a personal touch and accessible via a link or QR code. Ideal for email campaigns, social media, and digital ads, it offers a distraction-free giving experience. Nonprofits with websites can seamlessly integrate it by hyperlinking the form as a button or link on their website or blog posts. For nonprofits without a website, it serves as a versatile tool that can be shared through emails, newsletters, social media, or flyers, providing a simple and effective way to collect donations and expand reach year-round.

Help Save Lives: Make a Donation Today

Your support helps us save the lives of countless animals in need. Every donation, no matter the size, goes directly to providing food, shelter, medical care, and a second chance for the animals we rescue. Together, we can make a lasting impact on the lives of these deserving pets. Thank you for your generosity!

South Camden Animal Rescue

Give once Monthly Annually

Choose an amount to give
You'll be making a one-time donation of \$125.

\$30 \$60 \$125
\$300 \$600 Other

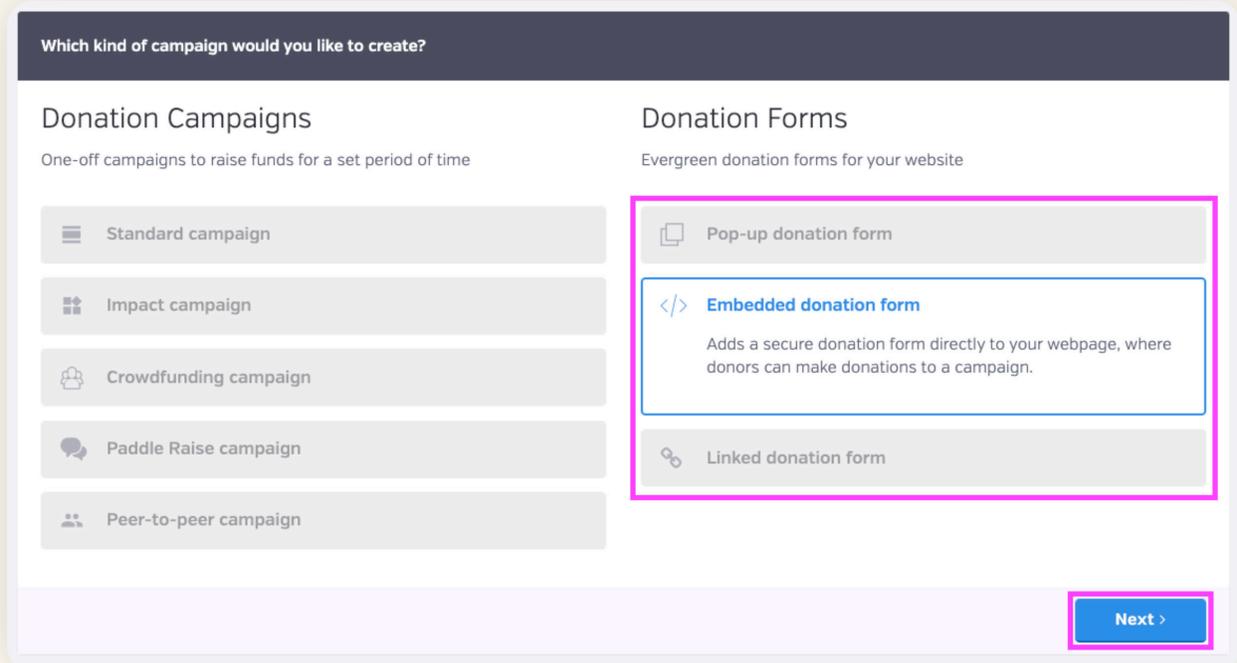
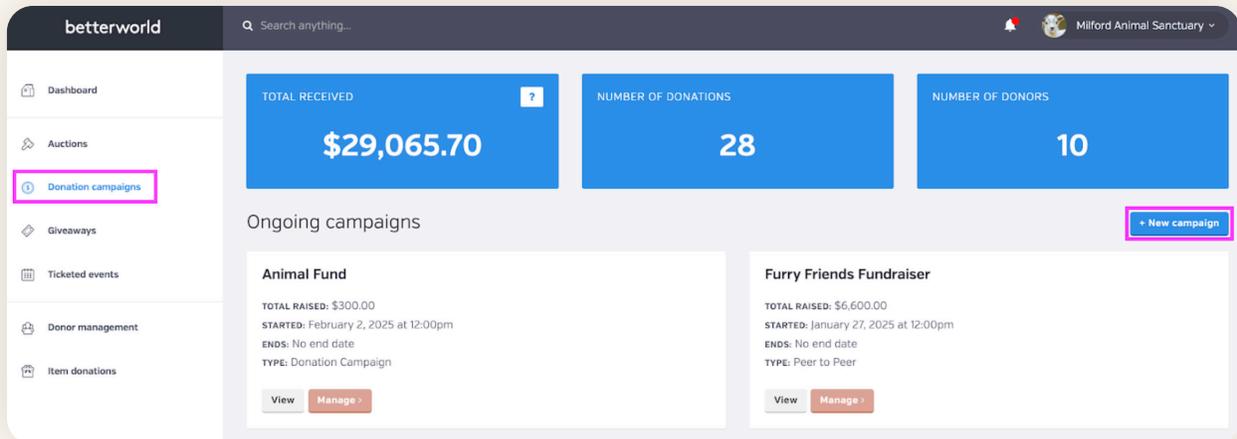
Donate

Secure donation

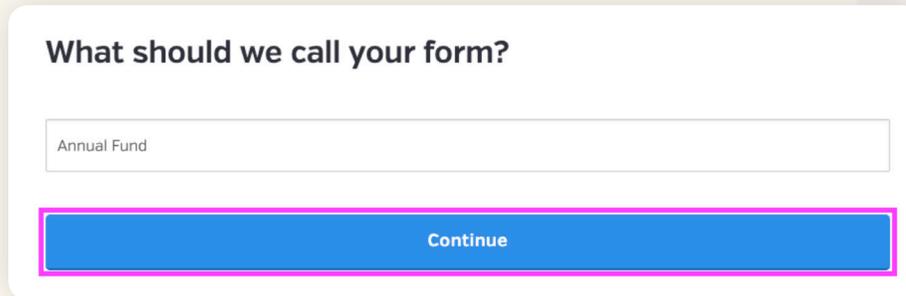
Step 1: Donation Form Creation

Creating your Donation Form is simple and intuitive—just follow these steps to set up a compelling fundraising page that engages donors and drives contributions!

1. **Create Your Form.** Go to the [Dashboard](#), click **Donation Campaigns**, and then click the + **New Campaign** button. Choose the type of Donation Form you would like and click the **Next** button.



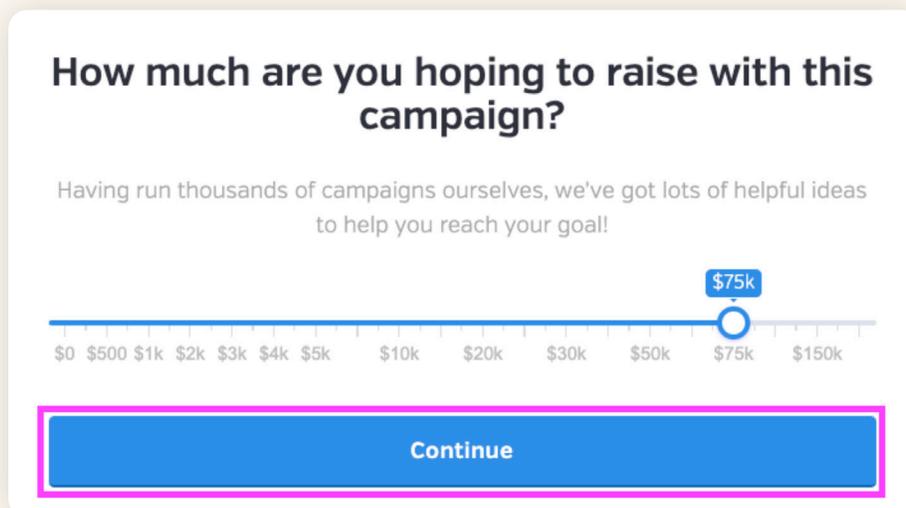
2. **Pick a Name.** It's time to give your form a name! For Embedded and Pop-Up Forms, this name is for internal use only and won't be seen by donors. For Linked Forms, the name could be visible if you add an "appeal to donors"—more on that soon. Choose something simple and reflective of your mission, like "Support Our Community" or "Annual Giving Fund." You can always adjust it later!



What should we call your form?

Continue

3. **Set a Fundraising Goal.** Drag the circle to set your campaign goal. By default, this goal will be private and visible only to you and your team on the dashboard. You can choose to display a thermometer on your donation form, which will show the goal and progress as donations are received. This is a great way to engage donors and keep them informed. Instructions for enabling this feature are provided in the next section.



How much are you hoping to raise with this campaign?

Having run thousands of campaigns ourselves, we've got lots of helpful ideas to help you reach your goal!

\$0 \$500 \$1k \$2k \$3k \$4k \$5k \$10k \$20k \$30k \$50k \$75k \$150k

Continue

Your Donation Form has been successfully created! You'll be automatically redirected to its **Settings** page in the **Dashboard**. In the next section, we'll guide you through all the customization options.

Step 2: Customizing the Forms

The customization process is similar for all Donation Form types. We'll guide you through the specific steps for each, allowing you to focus on what's relevant to your setup. While optional, it is recommended to complete as many of these steps as you can to enhance the donor experience and create a form that aligns with your organization's goals. All customization options are available on the **Settings** page, but keep in mind that some of the customization options only apply to specific form types:

1. **All Forms: Add a Thermometer.** Scroll to **Donation Form Settings**, check **Show thermometer (progress bar)** under the fundraising goal, and click **Save**. The progress bar motivates donors, creates urgency, and fosters community while making your form more engaging.

Embedded donation form settings

Here you can customize how you'd like the donation form to appear on your website.

About this campaign

TITLE
Annual Fund

FUNDRAISING GOAL
\$ 75000 .00

Show thermometer (progress bar)

Save

2. **All Forms: Adjust the Colors.** Scroll to the **Donation Form Settings** section and choose the heading and payment button colors.

Form Settings

HEADING COLOR

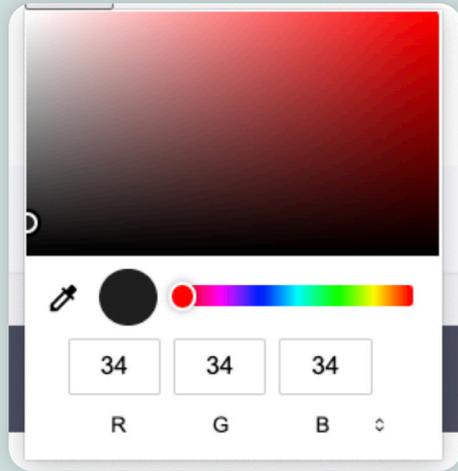
PAYMENT BUTTON COLOR

Save

- **Heading Color:** Is the text on the donation form that says “Choose the Amount to Give”
- **Payment Button Color:** Colors of the button such as Give Once, Monthly, Annually, and Donation Amount buttons.

To choose custom colors, click the color box on the screen to open the color picker tools. You can:

- **Use the Dropper:** Match a color from your logo or image by clicking the **dropper icon** and selecting the desired color.
- **Use the Color Picker:** Adjust shade and brightness in the square and use the slider for the main color.
- **Enter a Code:** Type the hex code for a specific color.



TIP:

Match these colors to your organization's logo or brand palette for a polished, professional look that ties everything together! You can also preview your donation form by clicking the eyeball icon located at the upper right-hand side under the Donation Form name.

3. **All Forms: Set Suggested Donation Amounts.** Scroll to the **Suggested Donation Amount** section to customize pre-set giving amounts and update the default selection. Next to each amount, you can add a personalized message that donors will see when selecting it, creating a more engaging and meaningful giving experience. Enable **Smart Suggestions** to provide donors with tailored amounts based on regional data. Smart Suggestions help donors feel guided and inspired to give generously. It's a simple, effective way to boost contributions!

Suggested donation amounts

These amounts appear as buttons on your donation form, next to the "Other" option.
You can also add a custom message for each given amount.

SUGGESTED GIVING AMOUNTS		
\$ 25	.00	Add your custom message here
\$ 50	.00	Add your custom message here
\$ 100	.00	Add your custom message here
\$ 250	.00	Add your custom message here
\$ 500	.00	Add your custom message here
DEFAULT AMOUNT		
\$ 100	.00	

USE SMART SUGGESTIONS
If enabled, we'll provide donors with personalized suggested donation amounts when possible.

No

Save

TIP:

Use the personalized message space to add impact metrics, such as "\$10 feeds a family" or "\$50 funds a school kit." Clear, tangible outcomes encourage donations, build trust, and strengthen donors' connection to your mission.

4. **All Forms: Edit the Default Donation Period.** Scroll to the **Default Donation Period** section to set one-time, monthly, or annual giving as the default. One-time donations suit short-term goals, while monthly giving builds consistent support. Customize the default to fit your campaign or disable options that don't align with your strategy.

Default donation period

DEFAULT DONATION PERIOD
One-time

ENABLE MONTHLY GIVING OPTION
Yes

ENABLE ANNUAL GIVING OPTION
Yes

Save

5. **All Forms: Enable Dedications.** Scroll to **Dedications**, check the box to enable, and click **Save**. This allows donors to add personal messages like “In memory of...” or “In honor of...,” creating a deeper emotional connection. Dedications honor loved ones, celebrate milestones, and make contributions more meaningful, strengthening donors’ bond with your cause.

Dedication

Allow donors to add a dedication to their donations

Save

6. **All Forms: Add A Custom Receipt Message.** Scroll to the **Custom Receipt Message** section to personalize donation receipts. Donors automatically receive a receipt after donating and adding a heartfelt thank-you note shows appreciation, reinforces their impact, and creates a positive experience. Clear communication like this keeps donors engaged and encourages future contributions to your cause.

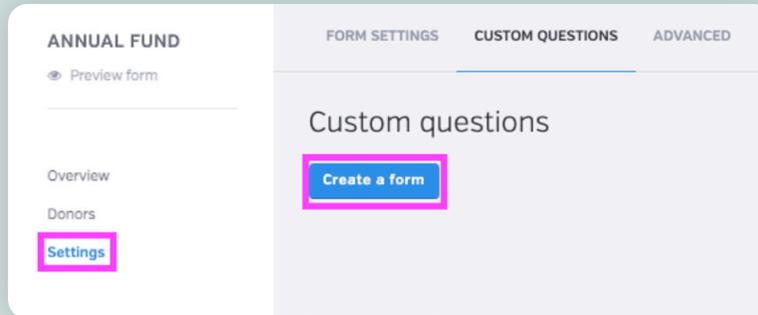
Custom Receipt Message

Write a custom message to display on donation receipts.

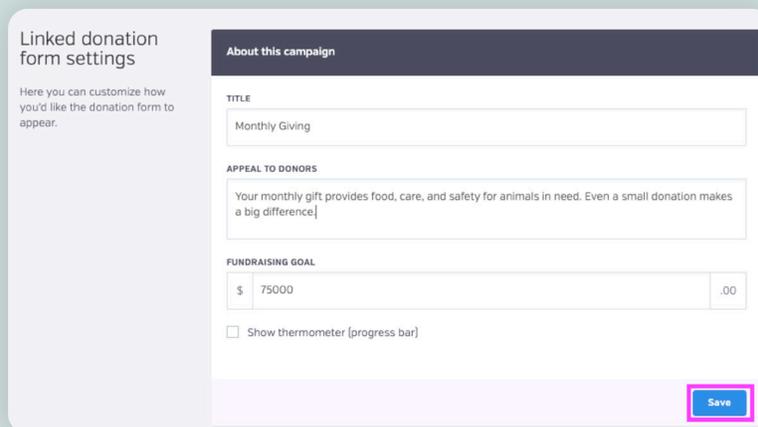
MESSAGE [OPTIONAL]

Save Send yourself a test

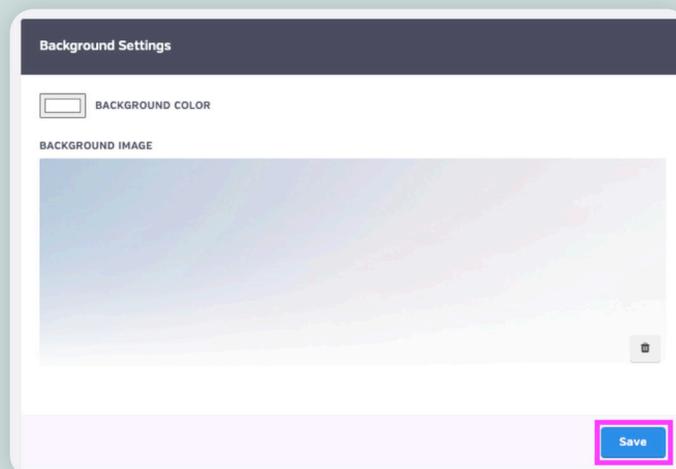
7. **All Forms: Custom Questions.** At the top of the **Settings** page, click **Custom Questions**. Select **Create a Form** to gather additional donor information. Custom questions allow you to ask for more information from donors outside of the standard information we collect for you (name, email, address, and phone). Add questions like “How did you hear about us?” or “Would you like to volunteer?” and set them as required or optional.



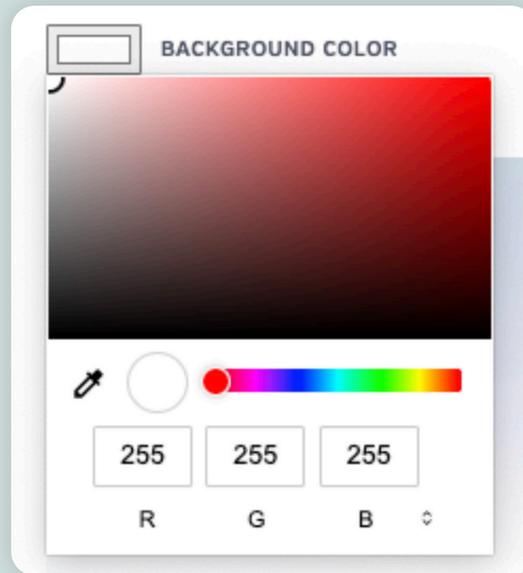
8. **Linked Only: Write a Message to Your Donors.** Scroll to **Linked Donation Form Settings** and add text in the **Appeal to Donors** box. A clear and compelling appeal communicates your mission, highlights the impact of donations, and encourages supporters to contribute confidently and generously.



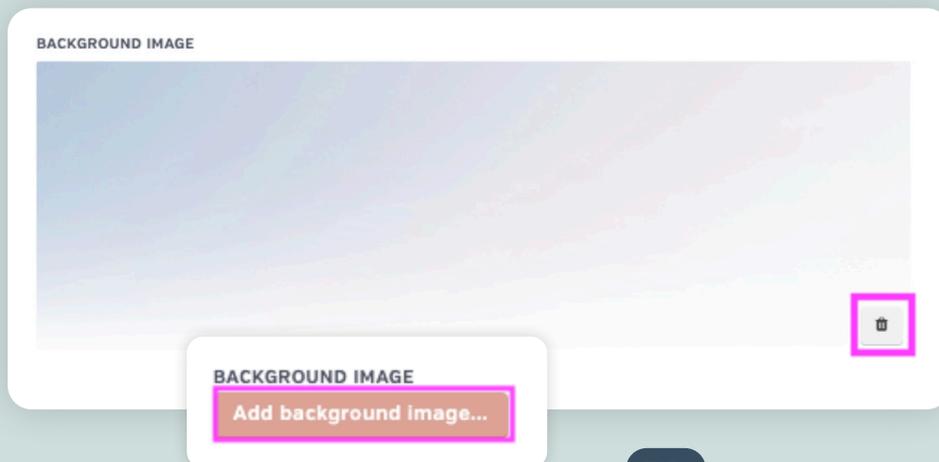
9. **Linked Only: Background Settings.** Scroll to the **Background Setting** section. In this section, you can customize the background color of your form and add a banner image to enhance its appearance.



- To change colors, click the **color box** to open the tool. You can match color using the dropper, adjust shades and brightness with the color picker, or enter a hex code for a specific color.



- To change the background image, click the **trash icon** to remove the current one. Then, click the **Add Background Image** button and the **Browse** button to upload a new image. Use the four arrows icon to resize it as needed and click **Save** to apply your changes.



TIP:

Select high-quality, on-brand images that reflect your mission to create a professional and visually inviting form. Keep in mind that the image area will expand to 100% of the window width and usually cover about 35% of the height, so we recommend using an image size of 2000 x 667px for optimal display.

10. **Linked Only: Redirect URLs.** Scroll to the **Redirect URLs** section, paste the URL of the page you want donors to visit, and click **Save**. This could be a thank-you page, a message about their impact, or a resource to learn more about your cause. A personalized redirect strengthens your connection with supporters.

11. **Linked Only: Add a Video.** Scroll to the **Video** section. If you have a video on YouTube or Vimeo, copy its link from your browser's URL bar and paste it into the provided box. Click **Save** to apply. Adding a video is a great way to connect with supporters and share more about your cause!

12. **Pop-up: Donation Button Settings.** Scroll to the **Donation Button** section to customize the button text and colors. Enter your desired text in the text box. This button will appear on your website, and while it won't display in the preview feature, you can easily update the color at any time.

- **Background Color:** Select a color that aligns with your branding and is easy to notice without being overwhelming.
- **Text Color:** Choose a color that contrasts clearly with the background, like dark text on a light background or light text on a dark background, for optimal readability.

13. **Embedded & Pop-Up: Add Website URL.** Scroll to the **Security** section, then copy your website's full URL from the address bar, including any subdomains like "www" or additional parts of the URL (e.g., <https://www.my-site.org>). Paste it into the box and click **Add Domain**. This step ensures your Donation Form functions correctly on your site and prevents unauthorized use by specifying the exact websites where it will be displayed.

Security

WEBSITES WHERE THIS FORM WILL APPEAR

The best way to do this is to head to your website and copy the exact address from the URL bar (e.g. <https://betterworld.org>). Please be sure to include the subdomain or "www", if present.

Great job! Your Donation Form is customized and looks great!
Now, let's walk through how to add it to your website.

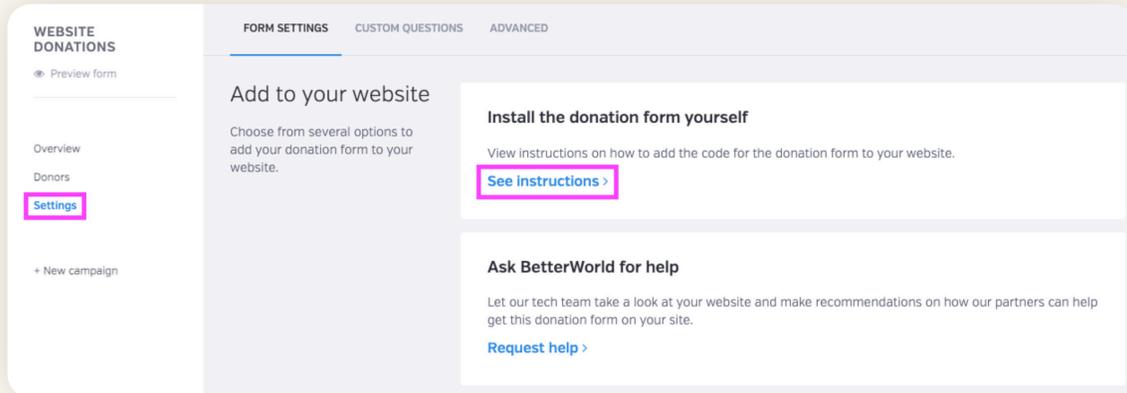
Step 3: Adding Your Donation Form to Your Website

Now that your Donation Form is set up, it's time to make it accessible to your supporters. Whether you want to use Embedded or Pop-Up Donation Forms on your website, or a Linked Form shared through a link or QR code, this step will guide you through the process.

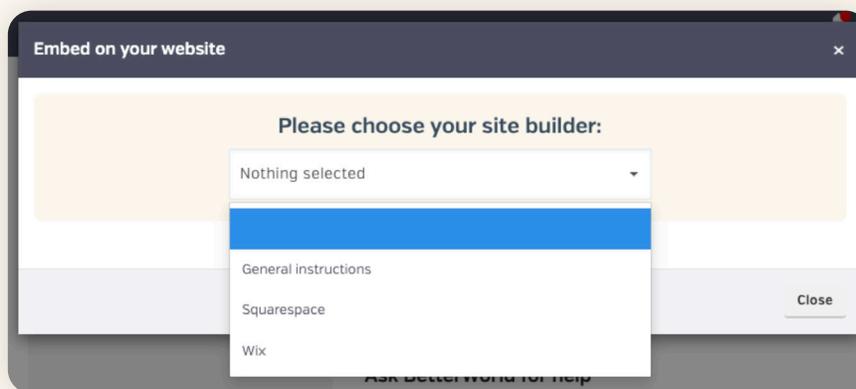
Adding Embedded and Pop-up Donation Forms to your Website

1. Go to the **Settings** section of your Donation Form and locate the **Add to Your Website** section at the top of the page.

2. Under **Install Donation Form Yourself**, click **See Instructions**.



3. From the dropdown menu, select your site builder to access detailed, customized guidance on placing the donation modal on your site.



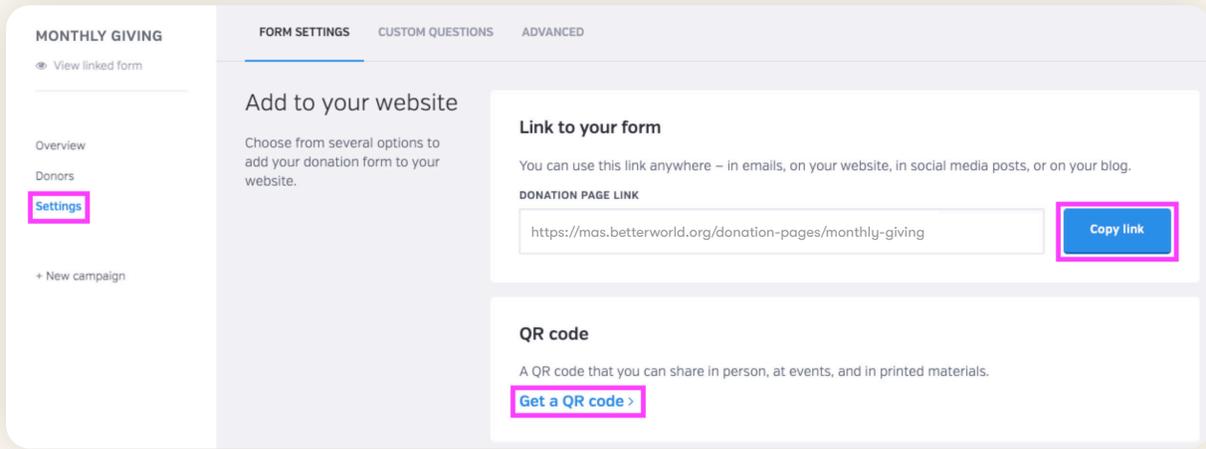
NOTE:

If your site builder isn't listed, select **General** for instructions, including the JavaScript library.

If you don't manage your website, share this information with your web developer, website manager, or anyone who helps manage your site to ensure a quick and seamless setup!

Adding Embedded and Pop-up Donation Forms to your Website

Go to the **Settings** section of your Donation Form. At the top, you'll find options to copy the form link or download its QR code.

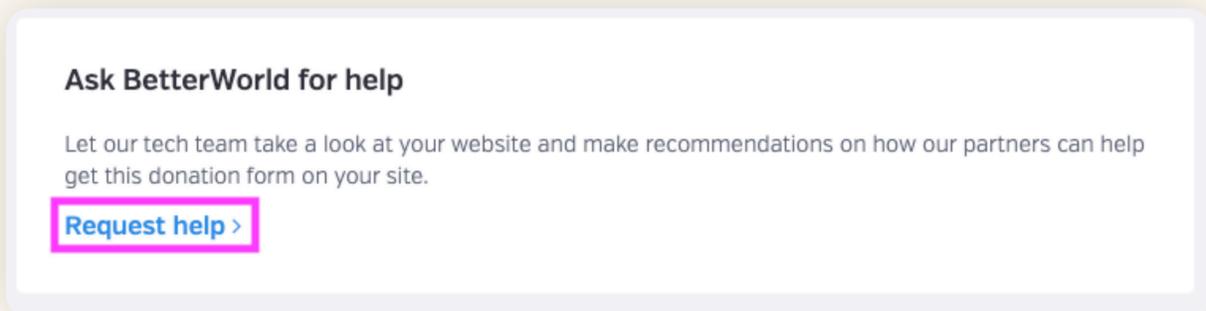


- **Link:** Copy and paste it anywhere—on your website, emails, social media, or newsletters.
- **QR Code:** A scannable code that directs users to your form instantly. Print it on flyers, posters, or event materials for easy, on-the-spot donations from mobile devices.

These tools make sharing your Donation Form simple and convenient!

Need Help?

If you have any questions or encounter issues, our setup team is here to assist. At the top of the **Settings** page, under **Ask BetterWorld for Help**, click **Request Help**. Fill out the form, and our team will respond promptly with the support you need!



Well done! Your setup is complete.

Next, we'll walk through how to promote your Donation Form and begin collecting donations.

Step 4: Getting the Word Out

Here are some effective ways to promote your Donation Form and boost contributions. By sharing it regularly online and in person, you'll expand your reach and maximize donations. The more you promote, the more visibility and support you'll gain!

- **Post on Social Media:** Share your donation form across all platforms with a compelling caption to engage your audience.
- **Send an Email Blast:** Reach out to subscribers with a clear, heartfelt message explaining the impact of their support.
- **Leverage Your Team:** Encourage board members, volunteers, and supporters to share the form on their social media, extending your reach through their networks.
- **Submit to Local Media:** Many TV and radio stations highlight nonprofits. Submit a short blurb with your Donation Form for free publicity.
- **Engage in Facebook Groups:** Share the link in local or interest-based groups. These communities often rally around causes that resonate with them.

The more strategies you use, the greater your chances of increasing donations!

Step 5: Managing & Tracking Donations

All your hard work is paying off, and donations are flowing in! Here's how to keep everything organized and ensure a seamless experience for your donors.

1. **Online Donations.** When donors donate online through your Donation Form, they choose from a one-time, monthly or annual giving frequency. Next, they will first choose their donation amount. They can either select a suggested amount or input a custom value.

South Camden Animal Rescue

Give once Monthly Annually

Choose an amount to give
You'll be making a one-time donation of \$125.

\$30 \$60
\$125 \$300
\$600 Other

Donate

Secure donation

NOTE:

Donors will receive an automatic receipt via email with all the necessary tax information immediately after donating. This is one less thing for you to worry about!

2. **Track Offline Donations.** If someone wants to donate by giving your organization cash or a check, you can manually add it to your campaign total. This is great to keep track of all donations in one place and have receipts automatically generated and sent!

MONTHLY GIVING

View linked form

Overview
Donors
Settings

+ New campaign

ALL CREATE AN OFFLINE DONATION

Create an offline donation

Use this form if someone has made a donation outside of the BetterWorld system (e.g. by cash or check) and you'd like to save the record of their donation in BetterWorld.

DONATION AMOUNT *

\$

New donor Existing donor

DONOR FIRST NAME *

DONOR LAST NAME *

DONOR EMAIL

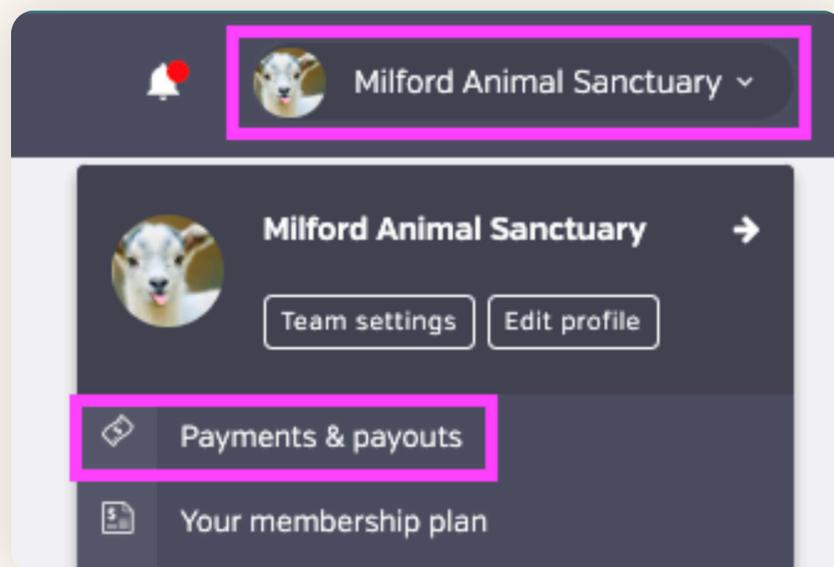
Send the donor an email receipt? ⓘ

Save

- a. Go to **Donors** and click **Create an Offline Donation** at the top of the page.
- b. Add the donation amount.
- c. Enter the donor's information:
- d. Either enter a new donor. Add their first and last name and, optionally, their email address. Adding their email address ensures they receive their automated email receipt.
- e. Or choose an existing donor. Click the **Existing Donor** button. Here, you can search by donor name. If you search the donor's name and you see multiples of their name in the dropdown menu, choose the option with the checkmark next to it. This will ensure the name is associated with an email, and the donor will receive their email receipt.
- f. If you want your donor to receive a receipt, be sure to check the box next to **Send the donor an email receipt?**
- g. Click **Save**.

3. **How to issue a refund.** Mistakes happen! If you've entered an incorrect amount for an offline donation or a donor is requesting a refund, you can handle it quickly.

- a. Head to your dashboard and click your organization's name in the upper-right corner to open the dropdown menu. Select **Payment & Payouts**.



- b. On this page you'll find a list of all online transactions. For offline transactions, switch to the **Offline** tab at the top of the page.
- c. Locate the transaction, click the three dots next to it, and select **Issue Refund**.

The screenshot shows a web interface with tabs for 'IN-PLATFORM' and 'OFFLINE'. There are buttons for 'FILTERS' and 'WITHDRAW FUNDS'. Below is a table titled 'Charges' with columns: DATE, PAID BY, CAMPAIGN, TYPE, DISCOUNT, TOTAL, FEE OFFSET, TRANSACTION FEES, REFUND AMOUNT, NET, PAID OUT?, and ACTIONS. Three rows of data are visible. The first row is for a donation of \$200.00. The second row is for an auction of \$2,000.00, with a tooltip showing '\$200.00 payment' and 'Issue refund' highlighted. The third row is for another auction of \$200.00.

DATE	PAID BY	CAMPAIGN	TYPE	DISCOUNT	TOTAL	FEE OFFSET	TRANSACTION FEES	REFUND AMOUNT	NET	PAID OUT?	ACTIONS
February 4, 2025, 3:35pm	Sam From BetterWorld	Paddle for the Paws	Donation	-	\$200.00	\$0.00	\$6.10	-	\$193.90	No	⋮
February 4, 2025, 3:35pm	Sam From BetterWorld	Back-to-School Live Auction	Auction	-	\$2,000.00	\$0.00	\$58.30	-	\$1,941.70		⋮
February 4, 2025, 3:35pm	Sam From BetterWorld	Back-to-School Live Auction - Instant Items	Auction	-	\$200.00	\$0.00	\$6.10	-	\$193.90	No	⋮

NOTE:

Refunds typically take 5-10 business days to reach your donor's bank account.

Step 6: Withdrawing Your Funds

You've done the work and built a successful Donation Form—amazing!

To withdraw your funds, head to [Payments and Payouts](#), and click **Withdraw Funds Now** to send funds to the bank account of your choice.

The screenshot shows the 'Create a payout' interface. On the left, a sidebar under 'PAYMENTS' has 'Withdraw funds' highlighted. The main area is titled 'ALL PAYOUTS' and 'Create a payout'. It includes instructions: 'You can withdraw funds at any time for charges processed at least 6 days ago, as long as you've reached the \$25.00 minimum payout threshold.' and 'Once a payout is initiated, funds will be deposited to your bank account according to Stripe's payout schedule.' A table shows the following details:

Type	Standard
Total raised	\$100.00
Net processing fees	0% \$0.00
Available to withdraw	\$100.00

Below the table is a 'Withdraw funds now' button and a summary box: 'We raised \$100.00 on BetterWorld and kept 100% of the dollars we raised!' with social media icons for Facebook and Twitter.

If you're receiving regular or recurring donations with your Donation Form, you have the flexibility to withdraw funds as frequently or as infrequently as you like. Weekly withdrawals are great for maintaining consistent cash flow, while monthly withdrawals may be better suited for organizations with less immediate financial needs. Select the schedule that works best for your organization!

NOTE:

Funds are available to be withdrawn six days after being received. This brief holding period is in place to protect against chargebacks, which we also handle for you if it ever comes up.

On your Payments and Payouts page, you may see a line item titled "Pending." This means those funds have not yet fulfilled the six-day holding period. You can withdraw multiple payouts or wait until more funds are available to withdraw in bulk.

That's it! If you have any questions or need assistance, don't hesitate to reach out to us.

Send us an email at support@betterworld.org.

We're always here to help!