

DonorDrive Matching Gift Integration with Double the Donation

Instructions Provided by Double the Donation's Team <u>https://doublethedonation.com</u>

support@doublethedonation.com

About DonorDrive and Double the Donation

DonorDrive (<u>https://donordrive.com</u>) is a leading provider of online fundraising software which helps nonprofits tap into participant networks so they can reach more, raise more, & do more.

Double the Donation (<u>https://doublethedonation.com</u>) is a leading provider of employee matching gift data and tools to nonprofits.

This guide was put together to help organizations who use DonorDrive's fundraising platform incorporate Double the Donation's employee matching gift plugin into their fundraising pages.

Requirements: Your organization must be a customer of DonorDrive and Double the Donation.



There are three ways to incorporate matching gift data into DonorDrive's platform. Here are the steps to integrate Double the Donation's plugin into a dedicated matching gift page.

On a Dedicated Matching Gift Page In the Donation Process on the Donation Thank You Page

As Resources for Fundraisers



Step #1: When logged into your nonprofit's primary admin account in DonorDrive scroll over "Content Mgmt" and select "Add Page"





Step #2: Fill out the fields to add a new page which will include Double the Donation's matching gift plugin and then click "Save Changes"

Suggested Text for Each Field:

Page Name: Matching Gifts

Page Title: Matching Gifts

Parent Page: None – Top Level Page

Forward URL: Remains Blank

Page Alias: Remains Blank

Link Opens a New Window: Unchecked

Show Page on Navigation Menu: Check Yes

Show Page only for Logged-in Constituents: Unchecked

Meta Description: Many companies match donations to our nonprofit. Use the below matching gift search tool provided by Double the Donation to see if your company will match your donation and access the appropriate forms, guidelines, and instructions.

Meta Keywords: Matching Gifts, Double the Donation, Match Employee Donations

Add Page Create a new page You are here: Top Leve Content Sala Page Name* Matching Gifts Page Title Matching Gifts Parent Page None - Top Level Page . Forward URL Link Opens a New Window 1 Yes Show Page on Navigation Menu W Yes Show Page only for Logged-In Constituents 1) Yes Meta Description Many companies match donations to our nonprofit. Use the below matching gift search tool provided by Double the Donation to see if your company will match your donation and access the appropriate forms, Meta Keywords Matching Gifts, Double the Donation, Match Employee **Donations** Pacie Allas ✓ Bave Changes ¥ Cancel Double ն Donatior matching gifts made easy

Step #3: Now that a new page has been created you'll select the page and click "Edit Content"

Page Matching Gifts - Example

Version History

| Pages | You are here: Top Level > Matching | Gifts - Example | | |
|--------------|------------------------------------|-----------------|------------------------------|----------------|
| Content Sets | | | | |
| Images | Search | | | Publish Now |
| Documents | | | | Publish Later |
| | Created 🗢 | Publish Date 🗢 | Template 🗢 | X Unpublish |
| | Adam D | | Default | Q Preview |
| | 07/17/2014 10:38 PM | | | Edit Content |
| | 1 results 10 • results per page | | \leftarrow 1 \rightarrow | Delete Edit Co |



Step #4: You're now in the page editor. Select "Edit"

Edit Matching Gifts - Example

Page

Change Template

| You are here: | Top Level > | Matching Gifts - Example | |
|---------------|-------------|--------------------------|--|
| | | | |



Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Nulla egestas tempus augue. Vestibulum sodales nonummy dui. Cras fermentum adipiscing turpis. Aenean quam ligula, pulvinar sit amet, pulvinar a, auctor vel, magna. In nonummy euismod risus. Vivamus ultricies volutpat erat. Cras dui.





Step #5: Select "Source" and then copy and paste Double the Donation's matching gift plugin code into the editor. Then click "Save Changes"

| Sty | - Ω | U | B 1 | ×z | \times^2 | $z = \frac{1}{2}$ | *= | = | \equiv | ŦŦ | - | (ind) | œ | | 87 | Ж | 6 | Ē | \bigcirc | | | | |
|---------------------------------|------------------|-----------|--------|--------|------------|-------------------|---------|------|----------|-------|-------|------------|------|------|------|------|------|------|------------|------|----------------------------|-------|----|
| Source | 9 50 | | | | | | | | | | | | | | | | | | | | | | |
| | | - | | | | | | | | | | | | | | | | | | | | | |
| ink href= | "//doui | blet | hedona | tion | . com | /api/ | /css/d | dplu | gin. | C33" | rel= | "sty | les | heet | t"> | | | | | | | | |
| TUX ULET= | // 404 | DIEL | nedona | it ton | · COIII | agt | (233/9 | aptu | gin. | | Ter= | aux aux | TES | nee | 2 > | | | | | | | - | |
| iv id="dd | -conta | iner | " ng-a | pp=" | dd.p | lugir | n"≻di | v cl | ass= | "well | ."×o | iv n | ig-1 | nclu | ude= | "sea | arch | _tem | plat | :e"> | <td>v×p></td> <td></td> | v×p> | |
| | | | | | | Iman | - 1 - 1 | | | | | | | | | | | | | - | : == / | 1 | |
| :≻a <u>href</u> = | "//dou | blet | nedona | tion | . COM | /matc | cning- | gran | t-re: | sourc | ces/n | atch | ning | -gi: | ft-b | asi | CS/" | >Mat | chir | ig G | IILS, | a/ al | no |
| :≻a <u>href</u> = | "//dou | blet | hedona | tion | . com | / Ina CO | cning- | gran | t-re: | sourd | ces/n | atch | ning | -gi: | ft-b | asi | CS/" | >Mat | chir | ig G | 1164/ | ar a | nd |
| ≫a <u>href</u> = | "//dou | blet | nedona | ICION | . COM | / macc | cning- | gran | t-re: | sourd | ces/n | atch | ing | -gi | ft-b | asi | cs/" | >Mat | chir | ig G | IICC, | az a | nd |
| :≻a <u>href</u> = | "// <u>dou</u> i | blet | nedona | ICION | .com | Inaco | cning- | gran | t-re: | sourd | ces/n | atch | ing | -gi: | ft-b | asi | cs/" | >Mat | chir | ıg G | | a> a. | nc |
| :≻a <u>href</u> = | "// <u>dou</u> | blet | nedona | ition | . COM | / ma c (| cning- | gran | t-re: | sourd | ces/n | latch | ing | -gi: | ft-b | asi | cs/" | >Mat | chir | ig G | 1104, | | nd |
| r≫a <u>href</u> = | "//dou | blet | nedona | LION | . COM | / ma c (| cning- | gran | t-re: | sourd | ces/n | latch | ing | -gi! | ft-b | asi | cs/" | >Mat | chir | ig G | 1104, | | nd |
| ·×a <u>href</u> = | "//dou | olet | Cance | I | . COM | / ma c (| cning- | gran | t-re: | sourd | ces/n | atch | ling | -gi! | ft-b | asi(| cs/" | >Mat | chir | ig G | 1104, | | nd |
| r≻a <u>href</u> = ✓ Save Cha | anges | olet X | Cance | | . com | Inact | cning- | gran | t-re: | sourc | ces/n | atch | ning | -gi! | ft-b | asi(| CS/" | >Mat | chir | ig G | 11.03 | | nd |
| r≫a <u>bref</u> = ✓ Save Cha | "//dou | x | Cance | | . com | matt | cning- | gran | t-re: | sourc | ces/n | atch | ning | -gi! | ft-b | asi(| cs/" | >Mat | chir | ig G | 11.04) | | no |

You can access your nonprofit's matching gift plugin code by logging into your Double the Donation (https://doublethedonation.com) account.

Step #6: Verify Double the Donation's matching gift plugin is working and click "Save Changes"

| You are here: Top Level > | Matching Gifts - Example | |
|---|---|---|
| Se Edit | | |
| See if your em Enter your company na | ployer will match your donation! me: | |
| Company Name | Matching Ciff and Voluntary Court information provided by | ¥ |
| Ļ | Double the Donation matching gifts made easy | |
| Save Changes X Ca | ancel | |

Note: If you choose to make additional edits to this page you'll need to copy and paste the <u>original</u> plugin code directly from your Double the Donation account each time.

Step #7: Publish your new matching gift page by first clicking on the page and then clicking "Publish Now"

| You are here: Top Level > | Matching Gifts - Example | | |
|-------------------------------|--------------------------|------------|-------------|
| Search | | | Publish Now |
| Created 🗘 | Publish Date 🗢 | Template 🗢 | ¥ Unpublish |
| Adam D 07/17/2014 10:51 PM | | Default | Q Preview |
| Adam D 07/17/2014 10:38 PM | | Default | Delete |



Step #8: Verify Double the Donation's matching gift plugin is up and running by visiting your main DonorDrive pages and selecting "Matching Gifts" from the navigation bar

| lome | Events | Personal Campaigns | Blog | Matching Gifts | Fu | ndraiser Search | ٩ |
|--------------------------|-----------|--|--------------|-----------------|----|----------------------------------|-------|
| See Enter y Compar | if your e | employer will mater ny name: Matching Gift and Volunteer Gra Double | ant informat | ion provided by | × | Get the work Tweet 0 Share 8+1 0 | d out |

Note: You may need to wait 15 minutes or open up your primary DonorDrive pages in a new browser

There are three ways to incorporate matching gift data into DonorDrive's platform. Here are the steps to integrate Double the Donation's plugin into donation thank you screens.

On a Dedicated Matching Gift Page In the Donation Process on the Donation Thank You Page

As Resources for Fundraisers



Step #1: Scroll over "Control Panel". Then scroll over "System Content". Then select "Default Content". The Default Content page will then load and you'll select "Donation"





Step #2: You'll want to modify the "Thank You" pages to include Double the Donation's matching gift search functionality. To do so click on one of the items that ends with "Thank You" then select "Edit".

Control Panel

Manage your DonorDrive® application

G Back To Control Panel

Search

| Name 🗢 | Last Modified 🌻 | Type 🌻 |
|---|-----------------|----------------|
| Donation Selection Page | 06/24/2010 | Global |
| Event Donation - Confirmation | 10/22/2009 | Event-Specific |
| Event Donation – Step 1 – Contact, Billing Info and Questions | 01/18/2008 | Event-Specific |
| Event Donation - Thank You | 06/30/2014 | Event-Specific |
| Event Participant Donation - Confirmation | 10/22/2009 | Event-Specific |
| Event Participant Donation - Step 1 - Contact, Billing Info and Questions | 01/29/2007 | Event-Specific |
| Event Participant Donation - Thank You | 06/30/2014 | Event-Specific |
| Event Team Donation – Confirmation | 04/10/2014 | Event-Specific |



Step #3: Click "Source", add an introduction using HTML code (optional), add the Double the Donation plugin code, and click "Save Changes"

Suggestion:

Start the source code with a thank you and then an overview of matching gifts.

Example HTML code:

<h2>Thanks for donating!</h2>

Did you know your company may match your donation which will make the impact of your donation go even further? Please use the below search box to see if your company will match your donation and to access your company's matching gift forms, guidelines, and company specific instructions.

Then add your Double the Donation plugin code below the thank you and matching gift overview.



You can access your nonprofit's matching gift plugin code by logging into your Double the Donation (https://doublethedonation.com) account Step #4: Return to the list of "Default Content". To do so, scroll over "Control Panel". Then scroll over "System Content". Then select "Default Content". The Default Content page will load and you'll select "Donation".





Step #5: Select the page you just edited, and click "View"

Control Panel

Manage your DonorDrive® application

| G Back To Control Panel | | |
|---|-----------------|----------------|
| Search | | |
| Name 🗢 | Last Modified 🌲 | Туре 🗘 |
| Donation Selection Page | 06/24/2010 | Global |
| Event Donation - Confirmation | 10/22/2009 | Event-Specific |
| Event Donation – Step 1 – Contact, Billing Info and Questions | 01/18/2008 | Event-Specific |
| Event Donation - Thank You | 06/30/2014 | Event-Specific |
| Event Participant Donation - Confirmation | 10/22/2009 | Event-Specific |
| Event Participant Donation - Step 1 - Contact, Billing Info and Questions | 01/29/2007 | Event-Specific |
| Event Participant Donation - Thank You | 06/30/2014 | Event-Specific |
| Event Team Donation - Confirmation | 04/10/2014 | Event-Specific |



Step #6: Verify Double the Donation's matching gift search functionality is working.

| Thanks for donating! | |
|---|---|
| Did you know your company may company will match your donation | r match your donation which will make the impact of your donation go even further? Please use the below search box to see if your n and to access your company's matching gift forms, guidelines, and company specific instructions. |
| | |
| | over will match your donation! |
| See if your emplo | · · · · · · · · · · · · · · · · · · · |
| See If your empto Enter your company name: | |
| See If your empto Enter your company name: Company Name | |

Note: If you choose to make additional edits to this page you'll need to copy and paste the <u>original</u> plugin code directly from your Double the Donation account each time.

Step #7: Return back to the list of "Default Content" and edit the other "Thank You" pages using the same steps

Control Panel

Manage your DonorDrive® application

G Back To Control Panel

Search

| Name 🗢 | Last Modified 🗘 | Type 🗢 | |
|---|-----------------|----------------|--|
| Donation Selection Page | 06/24/2010 | Global | |
| Event Donation - Confirmation | 10/22/2009 | Event-Specific | |
| Event Donation - Step 1 - Contact, Billing Info and Questions | 01/18/2008 | Event-Specific | |
| Event Donation - Thank You | 06/30/2014 | Event-Specific | |
| Event Participant Donation - Confirmation | 10/22/2009 | Event-Specific | |
| Event Participant Donation – Step 1 – Contact, Billing Info and Questions | 01/29/2007 | Event-Specific | |
| Event Participant Donation - Thank You | 06/30/2014 | Event-Specific | |
| Event Team Donation - Confirmation | 04/10/2014 | Event-Specific | |
| Event Team Donation - Step 1 - Contact, Billing Info and Questions | 04/10/2014 | Event-Specific | |
| Event Team Donation – Thank You | 06/30/2014 | Event-Specific | |

Note: This is the same page you earlier accessed by scrolling over "Control Panel" then scrolling over "System Content" then selecting "Default Content". The Default Content page then loaded and you selected "Donation" There are three ways to incorporate matching gift data into DonorDrive's platform. Here are the steps to add a matching gift resource for fundraisers.

On a Dedicated Matching Gift Page In the Donation Process on the Donation Thank You Page

As Resources for Fundraisers



Step #1: Download Double the Donation's matching gift guide for organizations to share with their fundraisers

Download the PDF from the following URL: <u>https://doublethedonation.com/forms/documents/peer-to-peer-fundraisers-guide-to-matching-gifts.pdf</u>



The guide provides an overview of matching gifts, highlights a sample, discusses the matching gift lookup tool, and encourages supporters to check if their company or their friends' companies match employee donations. Step #2: Access the "Resources" section of your admin portal. You do so by scrolling over "Control Panel", then scrolling over "System Content", and then click "Resources". You'll be taken to a resource page where you'll click "Add New Resource"

| Resources Manage event reso Back To Contro | ources | | Event / Campaign Donations / Transactions General Settings Forms Custom Fields | Add New Resource |
|--|--------|-------------|--|-----------------------------------|
| | | | | |
| Search | | | | Q. View |
| Search Name © | Туре ≑ | Size (KB) ≑ | Last Modified @ | Q, View (3) Downland P Edit |



Step #3: Upload the matching gift guide which you previously downloaded in Step 1 and add a description.



Sample description text:

Learn about employee matching gift programs with our peer-to-peer fundraisers guide.



Step #4: Log in to one of your test peer-to-peer fundraiser accounts and verify the resource guide is available by clicking on "Resources"

| 🖹 Dashboard 🛛 🕅 D | lonations 🛛 🔤 Messages | Resources | 1 | Welcome, Adam. ≠ ⊥ |
|--|--|---|------------|--------------------|
| Service Dogs "Until there's Phone \$40.543 P.O. Bex 6 | by Warren Retrievers a cure, there's a dog." 1.2307 Fax 540.543.2308 47 Madison. VA 22727 | Register Now | Donate Now | |
| Home Events | Personal Campaigns | Blog Matching Gifts | | |
| File Name | npaign | | | · · |
| peer-to-peer-fundr Learn about employee Resources 1-1 of 1 | aisers-guide-to-matching-g matching gift programs with ou | ifts pdf, (164.5 KB) r peer-to-peer fundraisers guide. | | Download File |
| © 2014 SDWR Privacy | Contact | | 6 | DonorDrive |



Have Questions About Double the Donation's Service?

- Learn more about Double the Donation's service by visiting our website at <u>https://doublethedonation.com</u>.
- View Double the Donation's pricing or start your risk-free trial at <u>https://doublethedonation.com/pricing</u>.
- Email Double the Donation at <u>info@doublethedonation.com</u>.
- Use the contact form for Double the Donation's customer support team at <u>https://doublethedonation.com/contact-us/</u>.
- Schedule a demo of Double the Donation's service at <u>http://www.vcita.com/v/doublethedonation/set meeting</u>.

