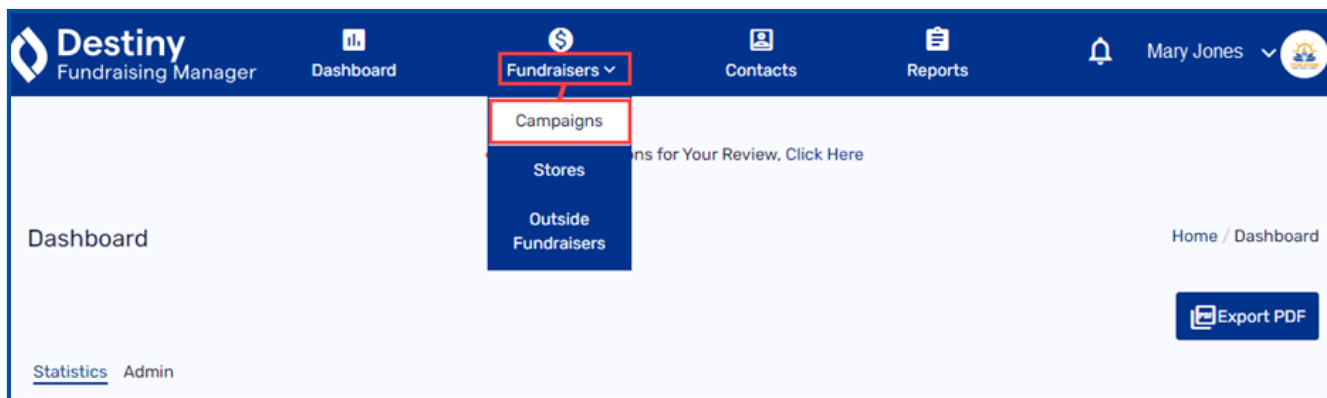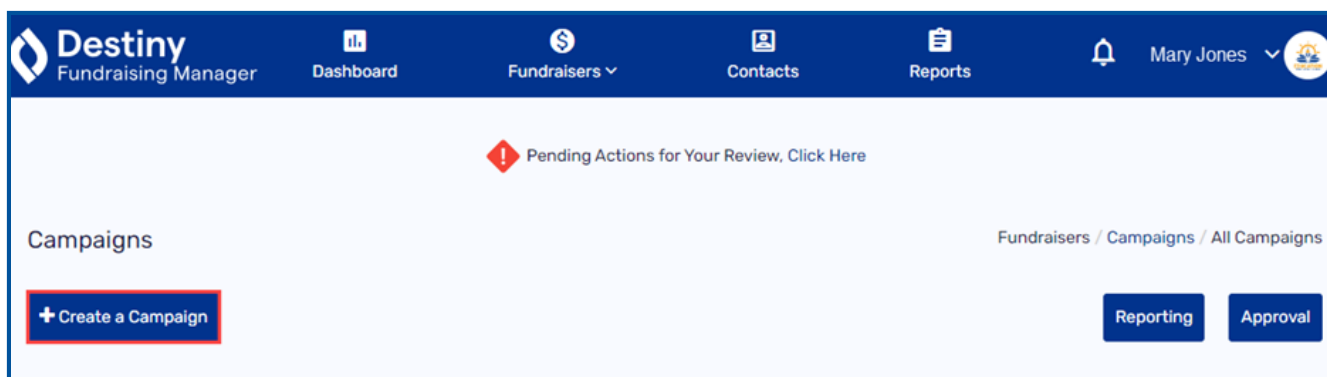# Follett SOFTWARE

Finance Suite

Destiny Fundraising Manager:
How to Create a Fundraising Campaign

Creating a campaign lets you accept electronic donations. Set up school-wide campaigns or smaller campaigns for a single club or classroom.

1 In the header, select **Fundraisers > Campaigns.**

2 Click **+Create a Campaign.**

The Campaign Details page appears.

Campaign Details
Enter the basic details of your campaign

Cancel   Save As ▾   Preview   **Submit to Bookkeeper**

Main Details
▭ Choose a Template

Campaign Name * ⓘ   Campaign Goal Amount * ⓘ

| Enter Campaign Name Here | | USD $ | Enter Goal Amount Here |

Campaign Time Frame * ⓘ   Campaign Category * ⓘ

| Starts | 09/06/2024 | | Ends | 09/06/2024 | | Please select... ▾ |

Accounting Code ⓘ   Campaign Project Creator * ⓘ

| Accounting Code | | Follett School Solutions |

Main Campaign Description (Body) * ⓘ

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Styles ▾   Format ▾   Font ▾   Size ▾   A ▾ A ▾   ⤢ ⯐

Campaign Media * ⓘ

Upload Photo ⓘ   + Add Embed Video ⓘ

☁ Upload Photo

Browse or Drag Image

🔵 Aspect Ratio

⚪ Parent Authorization - Student Images on Pictures or Videos ⓘ

Additional Options

| Donation Amounts (Optional) | **Click Here to Manage** |

| Collect Donate on Behalf-Of information From Your Donors | **Click Here to Manage** |

| ⚪ Add a Custom Message to Destiny Fundraising Manager's Emailed Payment Receipt ⓘ | Click Here to Manage |

| ⚪ Enable a Monthly Recurring Donation Option for Donors ⓘ |

| ⚪ Hide Donation Amount From "Donors" Feed ⓘ |

Cancel   Save As ▾   Preview   **Submit to Bookkeeper**

3 Fill in your campaign details:

Note: You can reuse or edit a template from a previous campaign or use a template rather than start from scratch. Under **Main Details**, click **Choose a Template**, select the desired template, and then click **Save**.

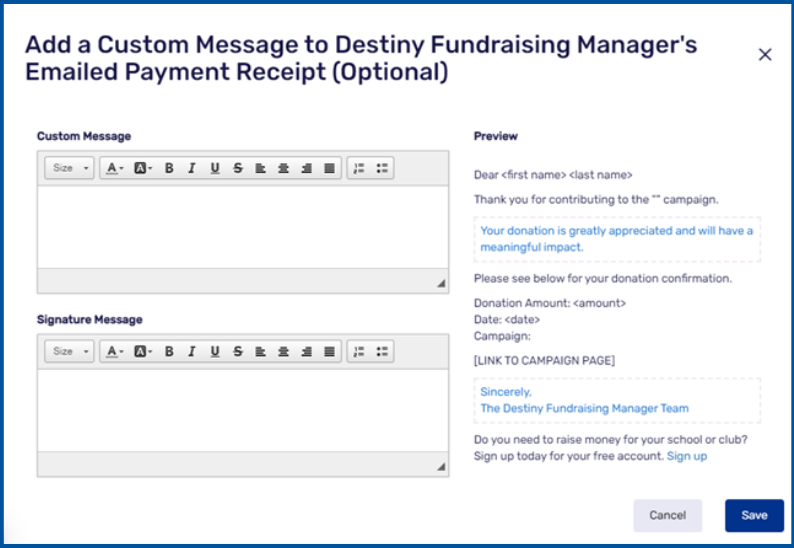| Field	Description
Campaign Name	Enter a name. **Note:** This is displayed at the top of your campaign and makes up the end of the URL on your campaign page.
Campaign Goal Amount	Enter your target goal amount.
Campaign Time Frame	Enter the start and end dates. When your fundraiser is approved, it will go live on the start date.
Campaign Category	Select a category from the drop-down. **Note:** Categories are prepopulated. If you don't see your category, pick the closest match.
Accounting Code	Leave this blank. It will be filled in by the bookkeeper as part of the approval process.
Main Campaign Description (Body)	Enter a description for your campaign. **Notes:** Be specific and creative to engage your potential donors. You may want to add your organization's tax-deductible ID number.
Campaign Media **Note:** At least one photo or video is required.	Do one of the following: To upload a photo, either: Click **Upload Photo** and select the desired file. Drag your desired file to **Browse or Drag Image**. To embed a YouTube video: a. Click **+Add embed Video**. b. Under **Youtube Video URL**, paste the desired URL. c. If you want this video to appear first in the campaign media section, turn on the **Set as Primary** toggle. d. Click S**ave Video**. **Note:** The video must be public for it to be visible.

4 Leave the **Aspect Ratio** toggle turned on to maintain the standard (21:9) ratio for photos and videos.

5 If you have received parental permission for each student shown in every photo or video for this campaign, turn on the **Parent Authorization – Student Images on Pictures or Videos** toggle. **Note:** Verification is the fundraising organizer's responsibility. The fundraising manager does not confirm parental authorization.

6 Under **Additional Options**, do any of the following:

Task	Description
Set suggested donation levels.	To set suggested donation levels, click **here to manage**. **Donation Amounts (Optional)** ✕ Donation Title — Donation Amount — Donation Image — Notes [Donation Title goes here] [USD $ Amount here] [Choose File No fil...hosen] [Notes goes here] [+ Add] Donation Title — Donation Amount — Donation Image — Notes — Delete No donation amounts added yet! [Cancel] [Save] a. Enter a donation level title, such as Gold. b. Enter the donation amount needed to reach that title. c. Upload an image (optional). d. Add a note by typing it in the field and then clicking **+Add**. e. Repeat these steps for each level you want to add. f. When all desired levels are added, click **Save**.

Task	Description
Allow donations on behalf of others.	Next to **Collect Donate on Behalf of information From Your Donors**, click **Click Here to Manage**. **Collect Donate on Behalf Information from Your Donors (Up to 5 Names)** × ⬤ Turn on / off the "Donate on Behalf of" section ⓘ **Enter the title of your "Donate on Behalf of" section*** Donate on Behalf of Your Student by Entering their Information Below **Optional: Enter the title for Entry Field 1** **Optional: Enter the title for Entry Field 2** Student First Name Student Last Name ○ Optional: Include Selection List 1 ○ Optional: Include Selection List 2 ○ Optional: Capture multiple instances(up to 5) of submitted records entered within the "Donate on Behalf of" section. For example, a donor can donate on behalf of up to 5 of his or her children (students) Cancel Preview **Save** a. Turn on the **Donate on Behalf of** toggle. b. Enter a title for this section. c. Enter a title for **Entry Field 1**, such as Student First Name (optional). d. Enter a title for **Entry Field 2**, such as Student Last Name (optional). e. To include **Selection List 1** and/or **Selection List 2**, turn on the toggle and fill in the fields. For example, you can add a list of homerooms for donors to select from (optional). f. To let donors indicate up to five names, turn on the **multiple instances** toggle. For example, someone might want to donate on behalf of their children. g. Click **Preview** to see how this section will appear. h. Click **Save**.

Task	Description
Add a custom message.	a. Turn on the toggle to Add a Custom Message to Destiny® Fundraising Manager's Emailed Payment Receipt. b. Click **Click Here to Manage**. c. Enter your **Custom Message** and **Signature Message**. **Notes:** Destiny Fundraising Manager automatically populates the donor's name, campaign name, amount, and date. Your custom message shows in blue in the Preview on the right side of the page. d. Click **Save**.
Allow monthly recurring donations.	Turn on the toggle to **Enable a Monthly Recurring Donation Option for Donors**.
Hide the donation amount on the campaign page.	Turn on the toggle to Hide Donation Amount From "Donors" Feed. The donor's name will still appear

7 Do any of the following:

- **To submit your campaign for approval**, click **Submit to Bookkeeper**. The bookkeeper will enter the accounting code and submit the campaign for district/school approval.
- **To see how your campaign will appear to donors**, click **Preview**.
- **To complete the campaign details later**, select **Save As > Save As Draft**.
- **To save this setup for a future campaign**, select **Save As > Save As Template**.