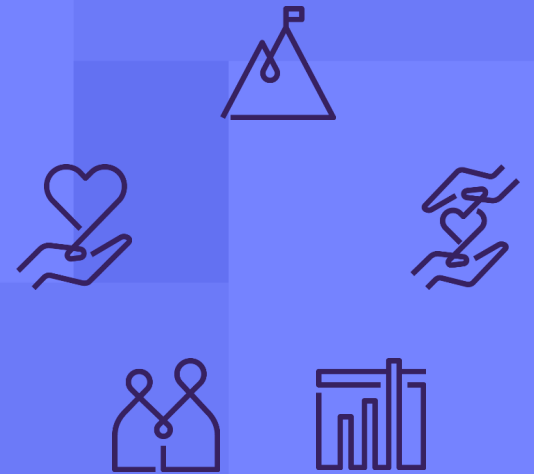


**DONOR ENGAGEMENT**

# Boosting Contributions



# Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction



# Agenda

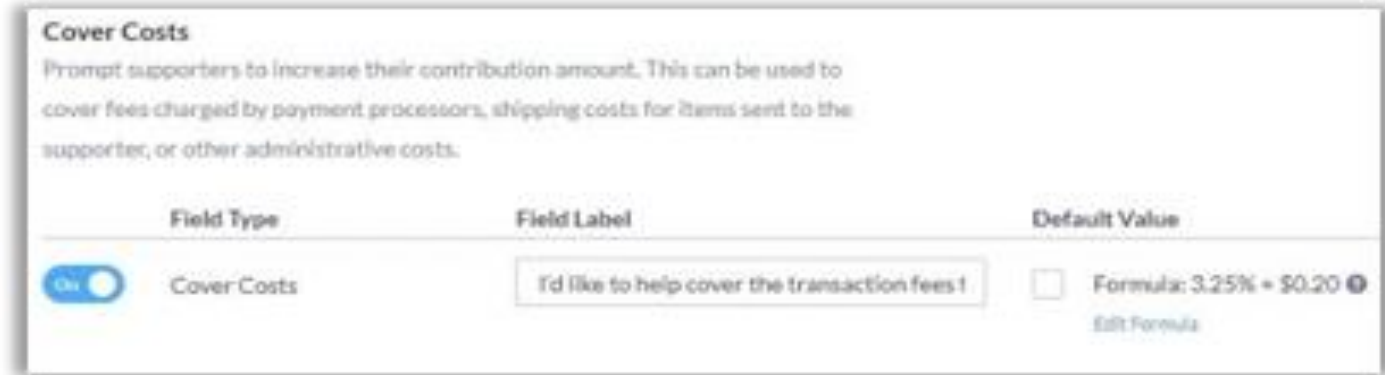
1. Cost Covering Options on Contributions
2. Tracking Cost Covering
3. Apply the Upsell Lightbox
4. Q&A



# Cost Covering Options on Contributions

# Implementing Cost Covering

Turning on the **Cover Costs** option is straightforward. From the **Build Page** of your **Online Action** contribution form, toggle the feature **On**.

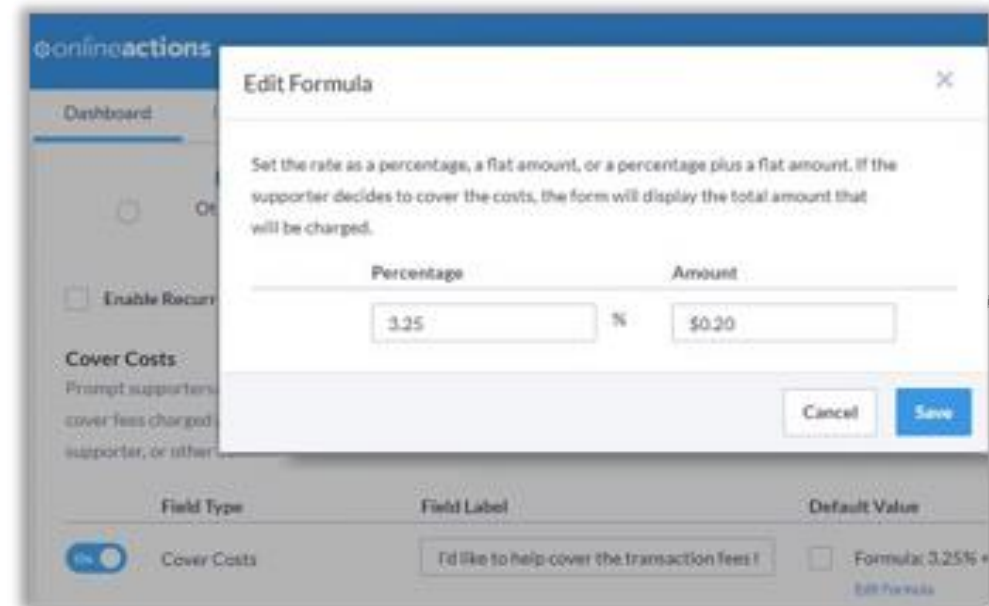


**Cover Costs**  
Prompt supporters to increase their contribution amount. This can be used to cover fees charged by payment processors, shipping costs for items sent to the supporter, or other administrative costs.

Field Type	Field Label	Default Value
<input checked="" type="checkbox"/>	Cover Costs	<input type="checkbox"/> Formula: 3.25% + \$0.20 <a href="#">Edit Formula</a>

With this function, you can:

- Select this option as default on your form
- Edit Formula to change how much is added to the donation amount
- Set the cost as a percentage of the donation, a flat amount, or a combined amount



**onlineactions** Edit Formula

Set the rate as a percentage, a flat amount, or a percentage plus a flat amount. If the supporter decides to cover the costs, the form will display the total amount that will be charged.

Percentage	Amount
<input type="text" value="3.25"/>	<input type="text" value="\$0.20"/>

# Implementing Cost Covering

When your donors view your form, they will see the checkbox and the total amount of their contribution if they decide to donate toward transaction costs.



**Contribution Information**

\$20	\$35	\$50	\$100
\$500	\$2,500	<input type="text" value="\$0.00"/>	

I'd like to help cover the transaction fees for my donation. My total amount will be **\$103.45**.

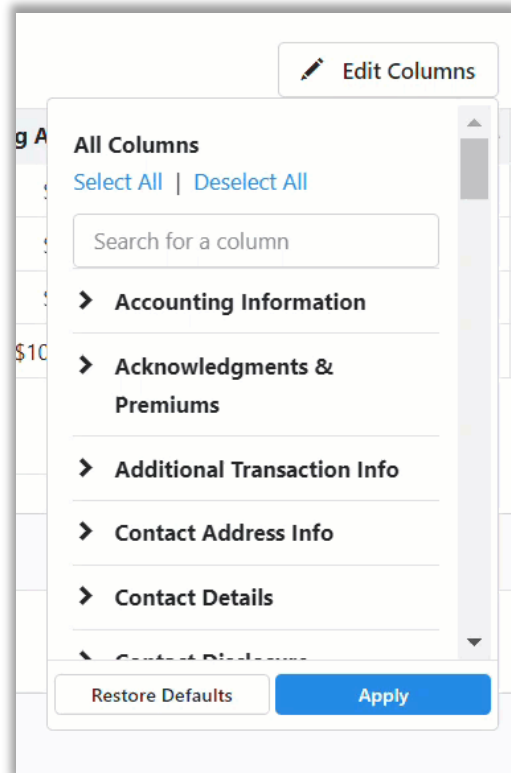
On the **Thank You** page, they will see an acknowledgment of the total contribution.



**Contribution Information:**  
Contribution Confirmation ID: AW-5bf688f4-def5-43c8-ad26-5c436eb9772e  
Contribution Date: 09/09/2019 2:54 PM Eastern Daylight Time  
Contribution Amount: \$103.45

# Tracking Cost Covering

# Tracking Covered Costs in Reports



You can filter on **Covered Costs** (yes or no) and add columns for **Covered Costs** (yes/no) as well as the **Covered Costs Amount** to several reports, including the **Contribution Report**, **Recurring Commitments Report**, and the **Online Activity Report**.

VANID	Contact Name	Date Submitted	Form Name	Form Type	Is New Contact	Referred By	Source Code	Committee Name	Covered Costs	Covered Costs Amount
105064262	Dogood, Dora	9/9/19	Stop Fracking	Contribution Form	Yes		Wildlands	People for Good	Yes	\$3.45
105064263	Wellgood, D'Andre	9/9/19	Stop Fracking	Contribution Form	Yes		Wildlands	People for Good	No	

In the **Online Activity Report**, the **Covered Costs Amount** is also displayed as an aggregate amount, which makes it easier to compare the **Cover Costs Amounts** raised per form.



# Tracking Covered Costs on Contribution Records

CONTRIBUTION  
Edit \$103.45 Contribution #19480873

Contributor Dora Dogood

Contribution ID 19480873

Designation\* People for Good

Date Received\* 9/9/19

Amount\* \$103.45 [Adjust](#)

Source Code

In the **Online Activity Report**, the **Covered Costs Amount** is also displayed as an aggregate amount, which makes it easier to compare the **Cover Costs Amounts** raised per form.

You can filter on **Covered Costs** (yes or no) and add columns for **Covered Costs** (yes/no) as well as the **Covered Costs Amount** to several reports, including the **Contribution Report**, **Recurring Commitments Report**, and the **Online Activity Report**.

Additional Transaction Information

Covered Costs \$3.45

Market Source

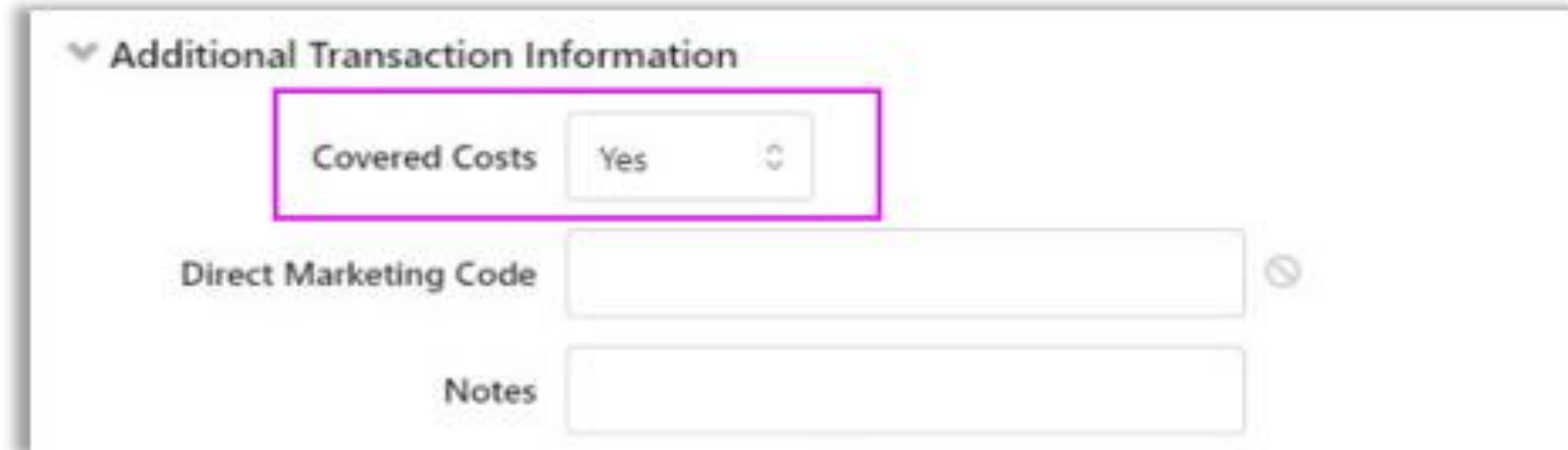
Direct Marketing Code

Notes

Created By (9/9/2019)

# Finding Contacts with Covered Costs

If you want to thank a group of donors for helping to cover your costs or you just want to see which donors are adding to their contributions by covering costs, you can search for them using **Create a List**.



▼ Additional Transaction Information

Covered Costs Yes ↕

Direct Marketing Code

Notes

From **Contributions** or **Recurring Commitments**, you can select **Yes** from the **Covered Costs** dropdown menu in the **Additional Transaction** Information section to find all contacts who have opted to cover costs on their donations.

# Upsell Lightbox

# Adding Upsell Lightbox to Forms

From **Online Actions**, when you create a new contribution form, you will see a section for **Recurring Upsell Lightbox** at the bottom of the **Build** page. Check the box to open the settings options.

You can set a range of donation amounts that will trigger the upsell lightbox to be displayed on the form. You will probably want to exclude very tiny donations or larger major gifts from this option, but you can choose any range you'd like.

Recurring Upsell Lightbox

Add a lightbox popup to suggest converting a one-time contribution to a monthly recurring commitment.

**Lightbox Trigger**

Supporters will see the upsell if their one-time contribution is between

and

# Adding Upsell Lightbox to Forms

Next, you'll be asked what kind of upsell you'd like to use. The first option is to ask them to **switch (convert)** their donation to a recurring gift. This option uses a percentage of the donor's one-time amount to ask them if they would like to become a monthly donor *instead* of making the one-time donation.

For example, if you set the percentage to 30% and the donor has selected \$100 for their donation, you'll be asking them if they would *instead* like to make a recurring commitment for \$30 per month.

### Recurring Amount

Choose an option to ask your supporters either to switch their one-time gift to monthly, or to split their gift between one-time and monthly. Note: one-time gifts will still be processed when the monthly offer is declined and when the lightbox times out.

Convert the one-time contribution to a monthly recurring gift ⓘ  
30% of the one-time amount is converted into a monthly ask [Edit Amount](#)

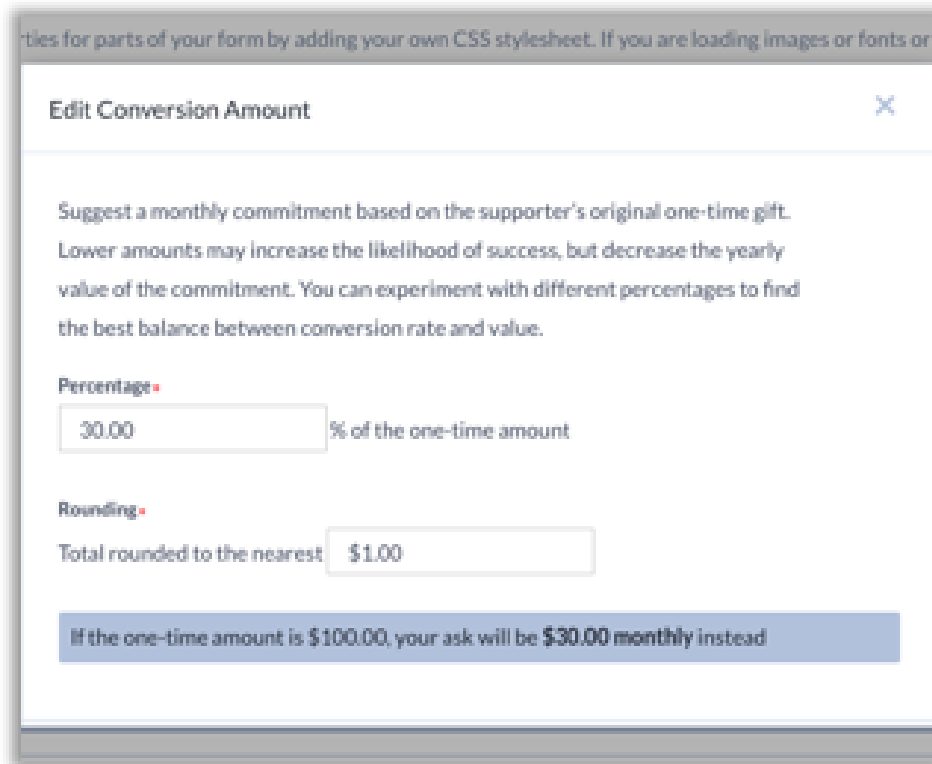
If the one-time amount is \$100.00, your ask will be \$30.00 monthly instead

Split the contribution between a one-time and a monthly recurring gift ⓘ

# Adding Upsell Lightbox to Forms

When your donor selects the final **Contribute** button on your form, they will see a lightbox that suggests that they switch to a monthly donation instead.

You can edit the suggested amount using **Edit Ask**.



ties for parts of your form by adding your own CSS stylesheet. If you are loading images or fonts or

### Edit Conversion Amount

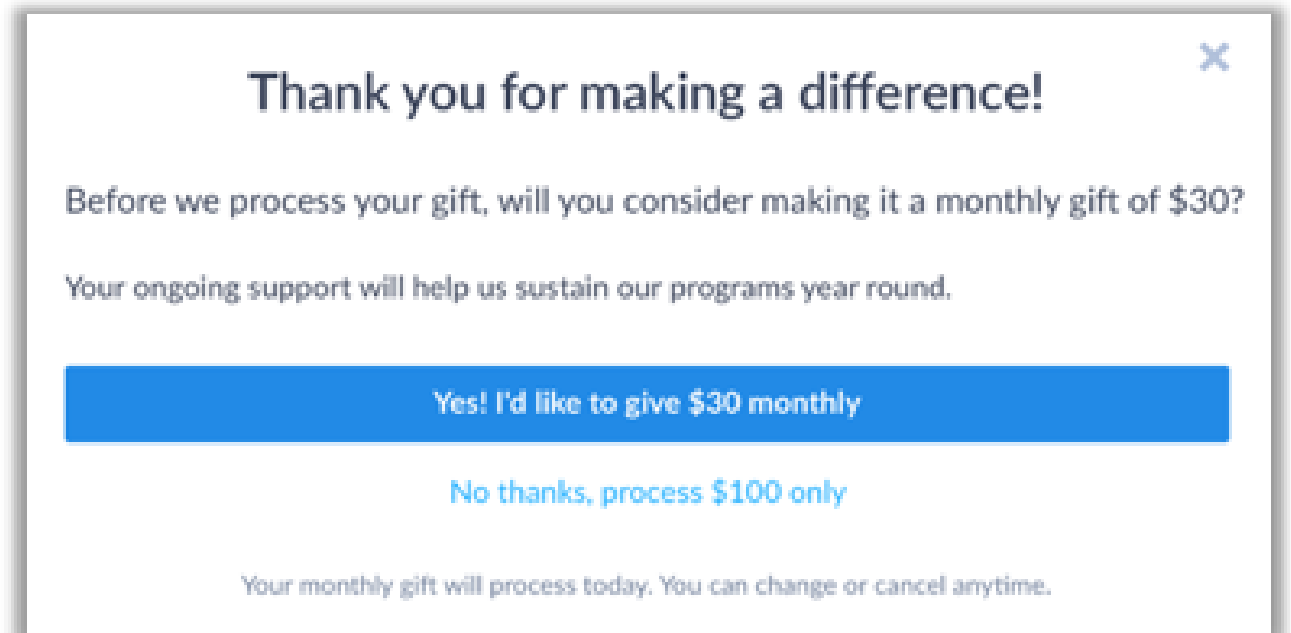
Suggest a monthly commitment based on the supporter's original one-time gift. Lower amounts may increase the likelihood of success, but decrease the yearly value of the commitment. You can experiment with different percentages to find the best balance between conversion rate and value.

Percentage  % of the one-time amount

Rounding

Total rounded to the nearest

If the one-time amount is \$100.00, your ask will be \$30.00 monthly instead



## Thank you for making a difference!

Before we process your gift, will you consider making it a monthly gift of \$30?

Your ongoing support will help us sustain our programs year round.

[Yes! I'd like to give \\$30 monthly](#)

[No thanks, process \\$100 only](#)

Your monthly gift will process today. You can change or cancel anytime.

# Adding Upsell Lightbox to Forms

The second option asks them to **split** their donation between a one-time and a monthly contribution. Both will be charged immediately.

When a donor selects the final **Contribute** button, they will be asked if they wish to use a portion of their gift to begin a recurring donation.

**Recurring Amount:**

Choose an option to ask your supporters either to switch their one-time gift to monthly, or to split their gift between one-time and monthly. Note: one-time gifts will still be processed when the monthly offer is declined and when the lightbox times out.

Convert the one-time contribution to a monthly recurring gift ⓘ

Split the contribution between a one-time and a monthly recurring gift ⓘ  
75% of the gift is one-time and 25% of the gift is a monthly ask [Edit Amount](#)

If the original one-time amount is \$100.00, the one-time contribution will be \$75.00 and the monthly amount will be \$25.00

e join us. [Forget this device.](#) [fastAction](#)

**Thank you! Can we keep counting on you?** ✕

You can make an even bigger impact by converting a portion of your donation to start a monthly gift. If you say yes, \$25.00 of your \$100.00 gift will be processed monthly starting today and \$75.00 will be processed as a one-time gift.

[Yes! Convert \\$25.00 to monthly](#)

[No thanks, complete my one-time gift of \\$100.00 only](#)

If you join our monthly giving program, your first gift of \$25.00 will process today, along with your revised one-time gift of \$75.00. If you decline the offer we will continue to process your one-time gift of \$100.00. You can update or cancel at any time.

# Q&A



# Additional Resources

# Support

- Contact your System Administrator
- Email [help@EveryAction.com](mailto:help@EveryAction.com)
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



# Help Center Resources

- [Use Cover Transaction Costs to increase contribution amounts](#)
- [Track responses to Online Actions](#)
- [Create more sustainers using a Recurring Upsell Lightbox](#)



# Additional Training

- Bonterra Academy: [Bonterra Academy Self Signup](#)
  - Foundational Webinar Series
  - Upcoming initiatives
  - Videos in Bonterra Academy



Thank You for Attending!

