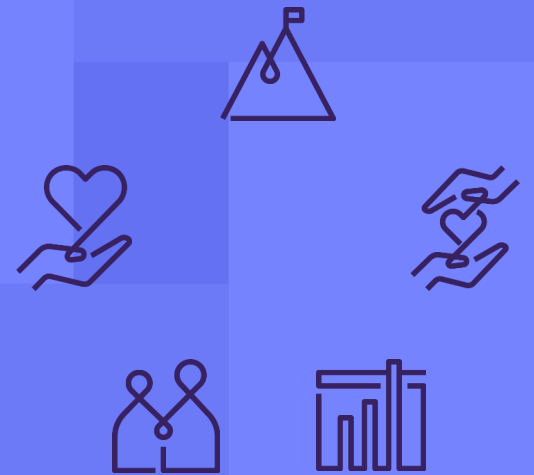


DONOR ENGAGEMENT

Creating Highly Effective Online Forms



Meet your Trainer...

Jaime

Training Specialist

Donor Engagement

EveryAction



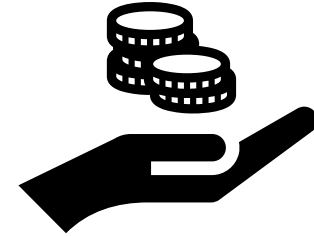
Agenda

1. Online Actions Overview
2. Types of Forms and their Uses
3. Creating Online Actions Forms
 1. Basics
 2. Building Your Page
 3. Customizing Your Form
 4. Creating Thank You Pages and Confirmations
 5. Sharing Your Form on Social Media
 6. Deactivating Your Form
 7. Publishing Your Form
4. Q&A



Online Actions Overview

Online Actions Introduction



Online Actions:

- Successful network effect creates streamline form filling and supported by Fast Action
- Adaptable forms ensure your beautiful forms are compatible across devices
- Fast loading speeds and social media functionality engage audiences with prompt responses
- Limitless forms ensure you are reaching all your audiences for all your purposes
- 100% EveryAction integration means seamless data reporting and record updating in real time!

Online Actions

With **Online Actions** you can gather information from and share information with new and existing supporters.

Create Forms for advocacy, contributions, events, petitions, email and volunteer signups, and story collection.

Create Pages to publicize organizational updates, events, and election data. You can also use them for attendee check-in.

These tools **support organizational growth, fundraising goals, and the success of your overall mission.** Basic performance metrics display on your Dashboard. You can also run reports for a comprehensive reading.



Tracking Online Actions

Gather and share information with supporters using Online Actions forms that support organizational growth, fundraising goals, and the success of your overall mission. You can track supporters' engagement with your forms and create lists based on the information they shared, contributions given, or the events they signed up for.

There are many ways to track the results of your form submissions, including from:

- the Online Actions dashboard
- the Online Activity Report
- the Online Forms Comparison Report
- individual contact records

You'll also be able to use the results of form submissions to search for contacts using Create a List.



Types of Forms

Type of Forms and their Packages:

	Advocacy	EA/EveryAction Digital	Online Contributions	Digital Organizing	Peer-to-Peer	Digital Stories
Advocacy	✓					
Contribution		✓	✓			
Event Host		✓		✓		
Ticketed Event		✓	✓			
Event Signup		✓		✓		
Peer-to-peer					✓	✓
Story Collection		✓		✓		
Volunteer		✓		✓		
Petition		✓		✓		
Signup						

Type of Forms and their Use Cases:

	Advocacy	EA/EveryAction Digital	Online Contributions	Digital Organizing	Peer-to-Peer	Digital Stories
Advocacy	✓					
Contribution		✓	✓			
Event Host		✓		✓		
Ticketed Event		✓	✓			
Event Signup		✓		✓		
Peer-to-peer					✓	
Story Collection						✓
Volunteer		✓		✓		
Petition		✓		✓		
Signup		✓		✓		

Creating Online Actions Forms

Creating Online Actions Forms

Each type of Online Actions form follows the same workflow. The forms available to you depend on the packages your organization purchased.

To create your form, open Online Actions from the sidebar and select **Create New Form** and the type of form to create.

The screenshot displays the Bonterra Online Actions dashboard. At the top, the 'Form Performance' section shows 'Views' at 536 (up from 266) and 'Submissions' at 128 (up from 65). A prominent green 'Create New Form' button is located below the performance metrics. The main content area is divided into three sections: 'Self Service Portal', 'Drafts', and 'Form Overview'. The 'Self Service Portal' section includes a description and a 'Modify Portal' button. The 'Drafts' section lists a 'Spring Garden Event' form, updated by Sam Richards on Dec 9, 2019, with a 'TICKETED EVENT' badge. The 'Form Overview' section on the right features a search bar and a list of forms: 'Contact City Council' (published by Sam Richards on Dec 11, 2019), 'Winter Garden Event' (deactivated by System User on Dec 11, 2019), 'Help our Garden Grow!' (published by Dora Dogood on Dec 10, 2019), and 'Join our volunteer team!' (published by System User on Dec 10, 2019, with a 'Deactivates in 2 days' warning).

Form Types and their Uses

- **Advocacy** - Amplify your message by selecting targets for your supporters to contact with a message you draft.
- **Contribution** - Raise money with a form you link to from your website, Targeted Emails, and Mobile Messages.
- **Ticketed Event** - Register supporters for and sell or distribute tickets to events online.
- **Petition** - Collect digital signatures from your supporters.
- **Signup** - Get new supporters signed up with your organization.
- **Volunteer** - Gather supporter commitments to volunteer with you.
- **Peer-to-Peer Fundraising** - Empower supporters to fundraise on your behalf with personalized campaigns on social media.
- **Event Host** - Empower supporters to host events on your behalf.
- **Story Collection** - Empower supporters to share their perspective on advocacy positions and motivate others to join your cause.

Form Design Steps



Most form types have four steps:

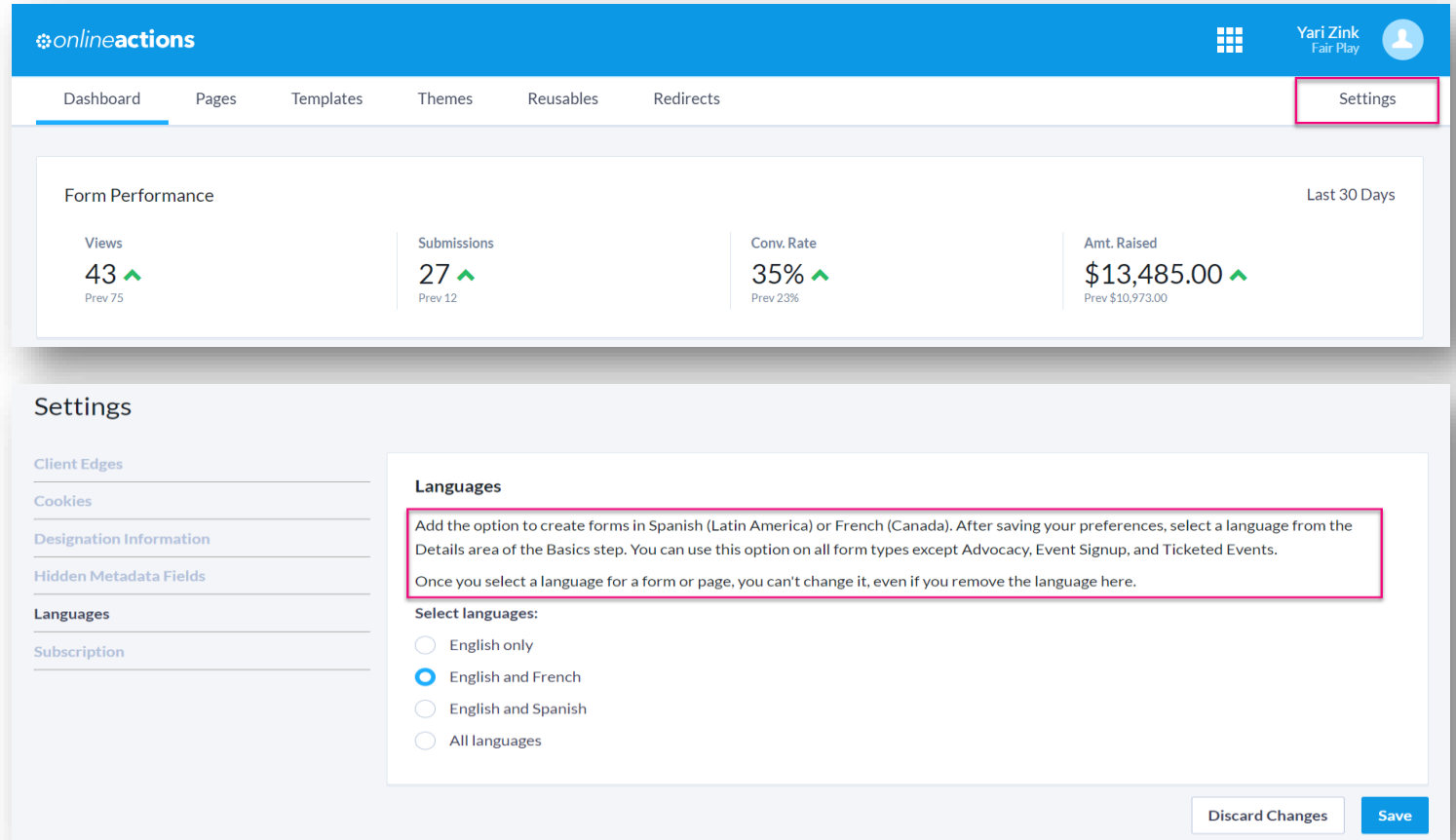
- **Basics**
- **Build Page**
- **Design**
- **Confirmation Page**

Setting your language

Enable the option to create French and/or Spanish versions of your forms by **updating your Language settings**. You can apply multiple languages to the following form types:

- Contribution
- Event Host
- Peer-to-Peer
- Petition
- Volunteer

Navigate to **Settings** at the top of your Online Actions header.



The screenshot shows the Online Actions dashboard with the Settings menu open. The 'Languages' section is highlighted with a red box. The settings are as follows:

Views	Submissions	Conv. Rate	Amt. Raised
43 ▲ <small>Prev 75</small>	27 ▲ <small>Prev 12</small>	35% ▲ <small>Prev 23%</small>	\$13,485.00 ▲ <small>Prev \$10,973.00</small>

Settings

- Client Edges
- Cookies
- Designation Information
- Hidden Metadata Fields
- Languages**
- Subscription

Languages

Add the option to create forms in Spanish (Latin America) or French (Canada). After saving your preferences, select a language from the Details area of the Basics step. You can use this option on all form types except Advocacy, Event Signup, and Ticketed Events.

Once you select a language for a form or page, you can't change it, even if you remove the language here.

Select languages:

- English only
- English and French
- English and Spanish
- All languages

Discard Changes Save

Find **Languages** on the left-hand menu and choose to **enable English only** forms, or combination **English/French**, **English/Spanish**, or **All languages** forms. You can **change your language settings** at any time, but the **language selection for forms you have already created will not change**.

Basics

Setting Basics

Details - Provide a form name and description, which is for internal use, and the title you want your supporters to see. If you have multilingual capabilities activated for your account, you can set the default language for the form. Once a form has been published, you will not be able to update the language, even if you update your language settings.

If you have a Vanity Domain, you will also see an option to add a custom URL for your form

Details

Name *

Internal use only.

Title *

This title displays at the top of your published form.

Description

This is our Q2 fundraiser specifically for materials needed for the back garden wall in our city park.

Language

English (United States)

This language will be applied to all non-editable content in the form, including some default text and alert messaging.

URL

https://example.org/a/

https://example.org/a/tell-congress-cancel-student-debt-everyone  Available

Auto-Scroll on Mobile

When enabled, **the form jumps, or automatically scrolls ahead to fields a supporter needs to fill to submit**, saving them the trouble of sifting through content before arriving at the actionable part of the form. This feature is off by default for embedded forms, but you can change this by setting the `data-mobile-autofocus` option to `true` in your embed code.

While the auto-scroll option is off by default for embedded forms, you can change this by setting the **`data-mobile-autofocus`** option to **`true`** in your embed code.

Auto-Scroll on Mobile

Enable Auto-Scroll on Mobile

Automatically scroll to the first set of form fields on mobile

Embed Code

```
<link rel='preload' href='https://someweburl/at.js' as='script'
crossorigin='anonymous'>
<link rel='preload' href='https://someweburl/at.min.css' as='style'>
<script type='text/javascript' src='https://someweburl/at.js'
crossorigin='anonymous'></script>
<div class="ngp-form"
  data-form-url="https://someweburl/v1/Forms/x-
C_Hv2DLUyajOAEo1o86g2"
  data-fastaction-endpoint="https://fastactionurl.com"
  data-inline-errors="true"
  data-fastaction-nologin="true"
  data-databag-endpoint="https://someprofurl.com"
  data-databag="everybody"
  data-mobile-autofocus="false">
</div>
```

Copy Embed Code

Adding a Footer

Add information in the footer of your form, including a disclaimer, a website URL, and a website name. If you are using a form for a political campaign, you can include your *Paid for by* disclaimer text here.

When you enter a website name in addition to a URL, the **link will be applied to the website name**. For example, if your URL is revampthegarden.org and you list Garden Rehab of Washington as the website name, Garden Rehab of Washington becomes a clickable link.

Footer Information

Footer information will appear at the bottom of your form, if you have not selected a custom theme. If your form contains more than one step, footer information will appear at the bottom of each step.

"Paid for by" Disclaimer Text

<p>Return to Website URL</p> <input type="text" value="http://revampthegarden.org"/>	<p>Return to Website Name</p> <input type="text" value="Garden Rehab of Washington"/>
---	---

Connecting a Gateway

On **Contribution** and **Ticketed Event** forms, you'll need to indicate which **Designation** the form is associated with and link to a **Gateway** that can accept online payments.

Connect a Gateway to Accept Contributions

Select the designation and gateway account(s) you will use to accept credit cards, PayPal, or other payment methods from your supporters.

Designation *

People For Good Designation

Gateway Account*

Credit Card

People for Good Always Works

PayPal

PayPal Gateway

Payment Processing

Enable Instant Payment Processing (Recommended)

Process donations instantly if all required fields are provided by PayPal.

[+ Show Advanced Fraud Protection Options](#)

FastAction

Enable FastAction so your **supporters can donate or take some other action with one click**. This feature can improve your conversions and donation rates. Supporters who have signed up for FastAction will open forms that have their personal information pre-filled. All they have to do is make choices in actionable fields, entering a donation amount.

If you are creating a **Contribution** form, you can also turn on one-click processing for **FastAction** users who take action directly from your **Targeted Emails**.

Enable One Click Conversions With FastAction

FastAction allows supporters to securely store their contact information and tokenized credit card, to make submitting forms easier across the network of FastAction clients.

Enable FastAction Auto Fill

Allow FastAction to prefill the contact information sections of your forms. Supporters will also be able to create and manage their FastAction account.

Enable FastAction Auto Processing

Allow supporters to donate with one click via a SmartLink sent in Targeted Email. Supporters will also be able to create and manage their FastAction account.

Track Your Efforts

Support your online fundraising and advocacy efforts by adding **codes** to form submissions and contact records that **track form performance over time and in comparison to other forms**. Associate your form responses with particular campaigns or even a specific contact.

Track Your Efforts

Source Code

All submissions received via this form will have this source code applied. Only one source code per submission.

Activist Codes

All contacts that submit this online form will have the following Activist Codes applied to their record. Multiple Activist Codes can be applied to this record.

Available Campaigns

You can specify a Campaign that will get associated with Form Submissions. Changing the Campaign after any Forms have been submitted could impact existing submissions.

Contact Attributions

Give credit to specific contacts for influencing online contributions. You can assign an attribution type to each contact after a designation has been selected.

Contacts * Attribution Types

 ×

[+ Add Attribution](#)

Confirmed Opt-in

When enabled, **supporters are asked to confirm their subscription via email** before you can add them to your email list. You can further configure this option using the Build Page step and using Targeted Email.

Confirmed Opt-In

Enable Confirmed Opt-In

All new email addresses from submissions to this form will receive a Subscription Confirmation email, set up in Targeted Email, to opt-in to future emails.

We recommend changing the visibility of the email Opt-In field: "Yes sign me up..." on the Build step to be shown (👁️), rather than hidden (👁️/)

Google Analytics

Track your website traffic and marketing effectiveness. Visit analytics.google.com for more information.

Google Analytics

Google Account ID Number

UA-123456-1

Enter either your Google Analytics (Ex: UA-123456-1) or Google Tag Manager (Ex: GTM-XXXXXX) number.

Building Your Page

Building Your Page

In the **text editor** at the top of the Build Page step, enter **the messaging you want included in your form**. Format your text, insert images, embed videos, and personalize the form for your supporters with Merge Fields and Reusables.

With **Contribution and Advocacy forms**, you can choose to have your form **appear as a continuous page or a multi-part process**. The layout options available for Advocacy forms depend on the delivery method and target groups you select on the Configure Advocacy step.

Build Your Online Page

Customize your message

Merge Fields

Reusables

B I U T_x | | | | | | | | |

Normal | Font | Size | | | Source

Help us restore this historic part of our City Garden!

{{FirstName or 'Friend'}},

We are in the last stages of fundraising to replace the back wall of our City Garden. The community has been incredibly supportive of our efforts to bring the garden back to its glory days.

Now we need your help! Can you join us in this last phase of our restoration?

body p

Progress Bar

Some forms can also be configured to display a **Progress Bar that shows your total number of signups and contributions, or amount given** to your organization. You can also display the deadline for supporters to take action.

Contribution forms may have additional sections, depending on the packages you have. These sections include Contribution Information, Premiums, and Tributes & Gift Memberships. At the bottom of this step you can also choose to add a Recurring Upsell Lightbox that encourages donors to convert one-time donations into a recurring commitment.

Progress Bar

Publically display progress towards a goal for this form. By default, this section is not displayed.

My goal is:

Submission Count Contribution Total

Goal Amount

Preset the progress towards goal to:

Also display the count of submissions

Preset the count of submissions to:

Deadline Date & Time

Contact Information

Select the information you want to collect from your supporter.

Toggle on the fields you want enabled and use the checkboxes to require those fields. Hide or unhide fields and enter default values for certain fields to make it easier for supporters to complete a form.

You have the option to change how the **Field Label name** displays online, but that does not change the field name in your contact records.

By default, new Online Actions forms are set to only allow submissions or contributions from supporters living in the United States. **To accept responses from supporters with non-US phone numbers or addresses, you can select to accept international submissions.**

Contact Information

Choose which fields to display, how they should be labelled, and whether or not that field is required for the form

Section Title

Contact Information

Accept Submissions from Supporters Living Outside the United States

Employer and Occupation Information

If you want to collect **Employer and Occupation information**, enable this section and specify the data you want to collect. Supporter contact records will update and you can search on this criteria in Create a List.

If the Designation you are using has a disclosure report (such as with a political campaign), the Employer Information section may include additional fields needed for compliance purposes.

Employer Information

Section Title
Employer Information

This is an example of text that can be used for the Legal Header. You may use this text, however it is recommended that you have this language reviewed by the appropriate agent before publishing

Merge Fields Reusables

B I U T A Bulleted List Numbered List Link Unlink Bold Italic Underline Text Color Background Color Source

Format Font Size

This information is required by law.

Field Type	Field Label	Req?	Default Value
<input checked="" type="checkbox"/> On	Employer	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> On	Occupation	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Off	Work Address Line 1	<input type="checkbox"/>	
<input type="checkbox"/> Off	Work Address Line 2	<input type="checkbox"/>	
<input type="checkbox"/> Off	Work Country	<input type="checkbox"/>	United States
<input type="checkbox"/> Off	Work City	<input type="checkbox"/>	
<input type="checkbox"/> Off	Work State/Province	<input type="checkbox"/>	--Work State/Province--
<input type="checkbox"/> Off	Work Postal Code	<input type="checkbox"/>	
<input type="checkbox"/> Off	Work Phone	<input type="checkbox"/>	
<input type="checkbox"/> Off	Work Email	<input type="checkbox"/>	

Merge Fields Reusables

B I U T A Bulleted List Numbered List Link Unlink Bold Italic Underline Text Color Background Color Source

Format Font Size

If you are self-employed, please list the name of the entity that is on your paycheck. Please list your line of work. "Business Person" is not acceptable, please enter the type of business instead.

We respectfully request that Partners of Partnerships and Members of LLC's contribute individually, instead of through their respective business entity.

Payment Methods

If you are creating a Contribution form, you will see a section that lists available payment methods using the Designation and Gateway you selected above. You can change what this is called in your form.

Payment Information

Section Title

The payment options for this designation are set to the following:

Accepted Payment Types



Security Code Disabled

Interests

Collect information from your supporters about their interests.

Interests

When a contact signs up, corresponding codes will be applied to the contact. By default, this section is not displayed.

Section Title
Want to learn more?

Merge Fields Reusables

B I U Ix | | | | | | | | | Normal | Font | Size | | | Source

Let us know if you're interested in hearing more from us!

body p

Activist Code	Field Label	Default Value	
Email Interests: Advocacy Alerts	Advocacy Alerts	<input type="checkbox"/>	
Email Interests: Monthly Newsle...	Monthly Newsletter	<input type="checkbox"/>	
Email Interests: Event Announce...	Event Announcements	<input type="checkbox"/>	

[+ Add Activist Code](#)

Merge Fields Reusables

B I U Ix | | | | | | | | | Format | Font | Size | | | Source

Activist Codes

Capture areas of interest and contact preferences.

When a supporter selects an interest on your form, a corresponding Activist Code is added to their contact record.

To collect or display **Additional Information**, change the **HTML code** or create a structured question to retrieve more information from supporters.

With **Create a Question**, specify the Field Type of your question (Checkboxes, Short Answer, etc.) that structure the responses supporters can give.

Depending on the field type you select, you can **map replies to contact record elements and track them later in your reports**.

- Map **Checkboxes (or Multi-Select Dropdown)** answers to **Activist Codes**
- Add **Paragraph** answers to the **Notes** section of a contact record
- Map **Radio Buttons** and **Single-Select Dropdowns** to either **Survey Questions** or custom contact fields
- Map **Currency**, **Date**, **Number**, **Short Answer**, and **Single Checkbox** answers to custom contact fields
- View replies in your **Online Form Custom Questions Report** without mapping them to contact records.

Create a Question ✕

Information collected from a question will be stored with the form submission.

Field Type*

- Select -
- Select -
- Checkboxes (or Multi-Select Dropdown)
- Currency
- Date
- Number
- Paragraph (8,000 char max)
- Radio Buttons (or Single-Select Dropdown)
- Short Answer (75 char max)
- Single Checkbox

Represent this question with a short label internal use only.

Eligibility of Terms

Some forms will include an **Eligibility or Terms section** that confirm a supporter's eligibility to participate or donate. Ticketed Event and Contribution forms have an Eligibility section. Event Host and Event Signup forms have, instead, a section called Terms.

The screenshot shows a configuration interface for an "Eligibility" section. At the top, there is a checked checkbox labeled "Eligibility". Below it is a "Section Title" field containing the text "Eligibility".

Field Type	Field Label	Req?	Default Value
<input type="checkbox"/> On	Accept Terms	I confirm that the following statements ar	<input checked="" type="checkbox"/> <input type="checkbox"/>

Below the table are two dropdown menus: "Merge Fields" and "Reusables".

At the bottom, there is a rich text editor toolbar with icons for Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, and Source. The text area below the toolbar contains a bulleted list of terms:

- I am not a foreign national who lacks permanent residence in the United States.
- This contribution is made from my own funds, and not those of another.
- This contribution is not made from the funds of a corporation or labor organization.
- This contribution is made on a personal credit card or debit card for which I have the legal obligation to pay, and is not made either on a corporate or business entity card or on the card of another person.
- I am at least eighteen years old.

Submit Button

Choose what text appears on your form's Submit button. On the Contribution form, you can also include an `{{Amount}}` merge field in this section.

Submit Button

Customize the Submit button label. Include the `{{Amount}}` merge field to display the total contribution amount in the button label.

Contribute `{{Amount}}`

Customizing Your Form

Customizing Your Form

Customize your forms to match the style of your website by applying Themes, applying your own CSS code, or using the Design feature in your form creation workflow.

When you are satisfied with your design choices, **select Preview before moving on to ensure the form has the desired look and feel.**

Style Your Form

Select how you want to customize the visual design of your form.

- Customize the colors and fonts of your form
Select colors and fonts consistent with your organization's brand to build trust with your supporters.
- Embed your form on your website
You don't need to do any special formatting to embed your form on your website. [Learn how!](#)
- Apply a theme to your form
Select one of your published themes for consistent layout and styling across your forms.
- Upload a custom CSS file
Change the size, position, and other display properties of your form by adding your own CSS stylesheet.

Creating Thank You Pages and Confirmation Emails

Creating Thank You Pages and Confirmation Emails

On the final step, **Confirmation Page**, choose to display a “Thank You” message after a supporter completes your form and/or send them an email confirming receipt of your form.

If you have a Vanity Domain, the URL you chose for the form appears above the Thank You Page section after you Publish.

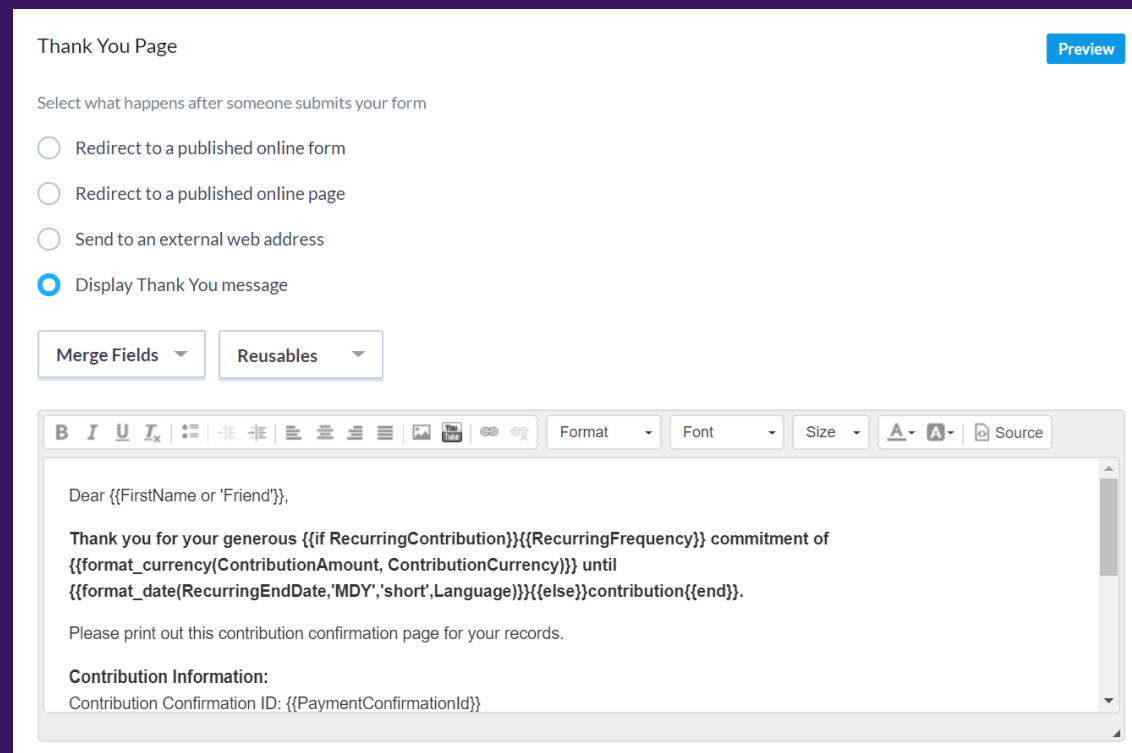
If you don't want to create a **Thank You Page**, you can **redirect supporters to another Online Actions form, an Online Actions page, or an external URL.**

The screenshot displays the Bonterra advocacy form editor interface. At the top, there is a navigation bar with tabs for Dashboard, Pages, Templates, Themes, Reusables, Redirects, and Settings. Below this, a progress bar shows five steps: Basics, Configure Advocacy, Build Page, Design, and Confirmation Page (the current step, indicated by a blue circle with the number 5). The main content area shows the form titled 'Primary Season' with a 'PUBLISHED' status and a 'Link & Embed' button. A green notification bar states: 'Your changes were published to the form. View the form at www.cocowins.org'. Below the notification, the 'Thank You Page' section is visible, with a 'Preview' button. The 'Thank You Page' section includes the instruction 'Select what happens after someone submits your form' and two radio button options: 'Redirect to an Online Actions form' and 'Redirect to an Online Actions page'. To the right, a 'Say Again?' section provides a tip: 'Want more from your users? Set up a "Secondary Ask" by redirecting to another form.'

Creating Thank You Pages and Confirmation Emails

The editor in this section allows you to **format your text, include merge fields and reusables, and embed images and videos**. A default message is pre-filled and includes relevant merge fields for customizing a “Thank You” page to your supporters.

In the **Confirmation Email section**, draft your message in the primary text editor, as well as in the **plain text** box for recipients who cannot view HTML formatted emails. Provide **the address that displays as the Sender and the address supporters Reply-To**. You can also send a confirmation copy of your email to additional addresses.



The screenshot shows the 'Thank You Page' editor interface. At the top right is a 'Preview' button. Below the title, there is a section titled 'Select what happens after someone submits your form' with four radio button options: 'Redirect to a published online form', 'Redirect to a published online page', 'Send to an external web address', and 'Display Thank You message' (which is selected). Below these options are two dropdown menus labeled 'Merge Fields' and 'Reusables'. The main editor area features a rich text editor toolbar with options for Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, and Unlink. The text area contains a pre-filled message with merge fields: 'Dear {{FirstName or 'Friend'}}', 'Thank you for your generous {{if RecurringContribution}}{{RecurringFrequency}} commitment of {{format_currency(ContributionAmount, ContributionCurrency)}} until {{format_date(RecurringEndDate, 'MDY', 'short', Language)}}{{else}}contribution{{end}}.', 'Please print out this contribution confirmation page for your records.', and 'Contribution Information: Contribution Confirmation ID: {{PaymentConfirmationId}}'.

Sharing Your Form on Social Media

Sharing Your Form on Social Media

To **share your form on social media**, specify how it displays in the **Social Metadata** section. **Add an image, title, and brief description**. Review the requirements of the platforms you enable sharing for, to be certain your image works on their system.

You can also **empower supporters to share your form with their online networks** when you choose to include links to your social media. Allow your supporters to **share the form directly or share a page where the form is embedded or linked**. Set up tracking codes to trace supporters who donate or take action from one of your links.

Social Sharing Information

This information will be displayed when your page is shared on social networks, like Facebook and Twitter.

Share URL

The share buttons will default to sharing the URL of your form if you leave this field blank. If you want the share buttons to use a different URL, use this field.

Facebook

Show Facebook Share Button

Market Source Code

If left blank we will automatically populate the share button with the default market source code above. This allows you to track which subsequent form conversions came in via your supporters using this share button.

Twitter

Twitter Handle

Show Twitter Share Button

Referrer Tracking

Enable 'Referrer' Tracking

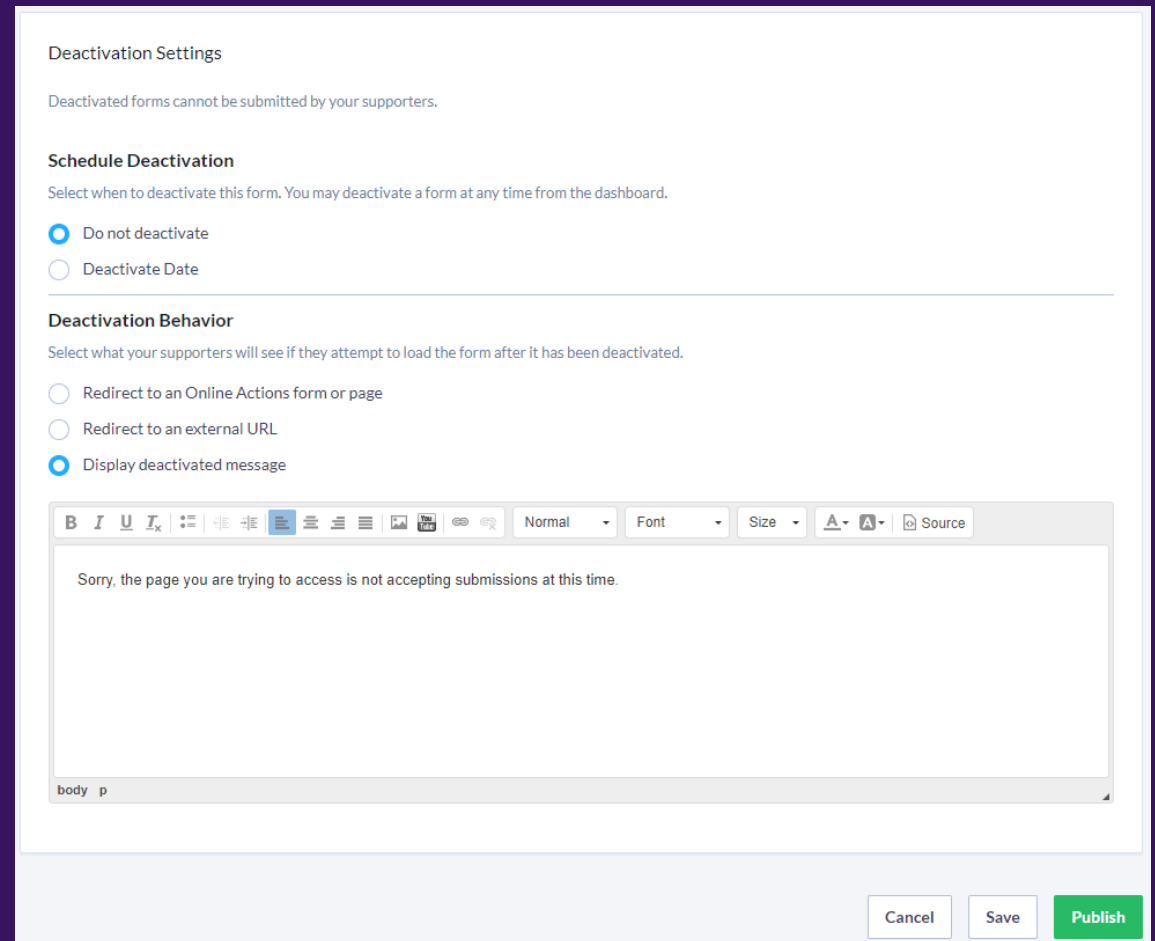
When a supporter shares a link with tracking enabled, any friends taking action will be related back to the supporter.

Deactivating Your Form

Deactivating Your Form

In the **Deactivation Settings** section, choose to have your form deactivate on a certain date and set a message to display when supporters reach a deactivated form.

Ticketed Event and **Event Signup** forms deactivate after your event concludes by default. Other form types remain active by default. In any case, you can choose when and if a form deactivates.



The screenshot shows the 'Deactivation Settings' configuration page. At the top, it states 'Deactivated forms cannot be submitted by your supporters.' Below this, the 'Schedule Deactivation' section offers two options: 'Do not deactivate' (selected) and 'Deactivate Date'. The 'Deactivation Behavior' section provides three choices: 'Redirect to an Online Actions form or page', 'Redirect to an external URL', and 'Display deactivated message' (selected). A rich text editor is visible, containing the message: 'Sorry, the page you are trying to access is not accepting submissions at this time.' The editor includes a toolbar with various formatting options. At the bottom right, there are three buttons: 'Cancel', 'Save', and 'Publish'.

Publishing Your Form

Publishing Your Form

At any point in the form creation process you can **Save and exit** or **Cancel your form**. Before you publish, select Preview to see how your “Thank You” page and confirmation email will look to your audience.

The screenshot displays a web form preview interface. On the left is a sidebar menu with a search bar and a list of categories: Contact Address Information, Contact Details, Contribution Information, Employer Information, Form Settings, Additional Information Questions, and Advanced. The main preview area shows a form with a progress indicator at the top (1 Amount, 2 Details, 3 Payment, 4 Finish) and a 'fastAction' dropdown. Below the progress indicator are two rows of green buttons for donation amounts: \$20, \$35, \$50, \$100 in the first row, and \$500, \$2,000 in the second row. A text input field contains '\$0.00'. At the bottom right are buttons for 'Pay with Card' and 'PayPal'. The user's name 'Robyn NiConney' and a 'Logout' link are visible at the top right of the preview area.

Publishing Your Form

Use the **dropdown menus** on the left side of your Preview page to **see how your form works with data in the fields**. Choose test values and select Apply and the form will render the information of an individual supporter.

After you **Publish your form**, **select Link & Embed** to retrieve your URL and the code for embedding the form on your website. If you embed your form, your banner image, *Paid for by* disclaimer, and custom CSS will not be visible.

The screenshot displays the Bonterra form preview interface. On the left, there is a sidebar with the following elements: a close button labeled 'x Close Preview', 'Clear All', and 'Apply' buttons; a 'Preview' dropdown menu currently set to 'Confirmation Page'; a search box labeled 'Search for a merge field'; and two expandable sections: 'Contact Address Information' (expanded) and 'Contact Details' (collapsed). Under 'Contact Details', there are input fields for 'Cell Phone', 'DOB' (with a date picker icon), 'Ethnicity', and 'First Name'. The main preview area on the right shows a confirmation page with the following content: 'Dear Friend,', 'Thank you for your generous contribution.', 'Please print out this contribution confirmation page for your records.', 'Contribution Information:' section containing 'Contribution Confirmation ID:', 'Contribution Date: 12/05/2019 5:41 PM Eastern Standard Time', and 'Contribution Amount:'. Below this is the 'Contact Information:' section, which is currently empty. At the bottom of the preview, it shows 'Account Type: Unknown' and 'Account Number Ending: ****Unknown'.

Q&A

Q & A



Additional Resources

Support

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



Help Center Resources

- [Overview: Online Actions](#)
- [How to: Create Online Actions Forms](#)
- [Navigating Online Actions Tutorial](#)
- [How to: Use Themes to style Online Actions Forms](#)
- [How to: Use Questions on Online Actions Forms](#)
- [How to: Use custom CSS with Online Actions](#)
- [How to: Track responses to Online Actions](#)



Additional Training

- Bonterra Academy:
<https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>
- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



Thank You for Attending!

