How to Add Custom Questions to Donations

Category: Website Building
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Collect important information from donors by adding custom questions to your donation forms.

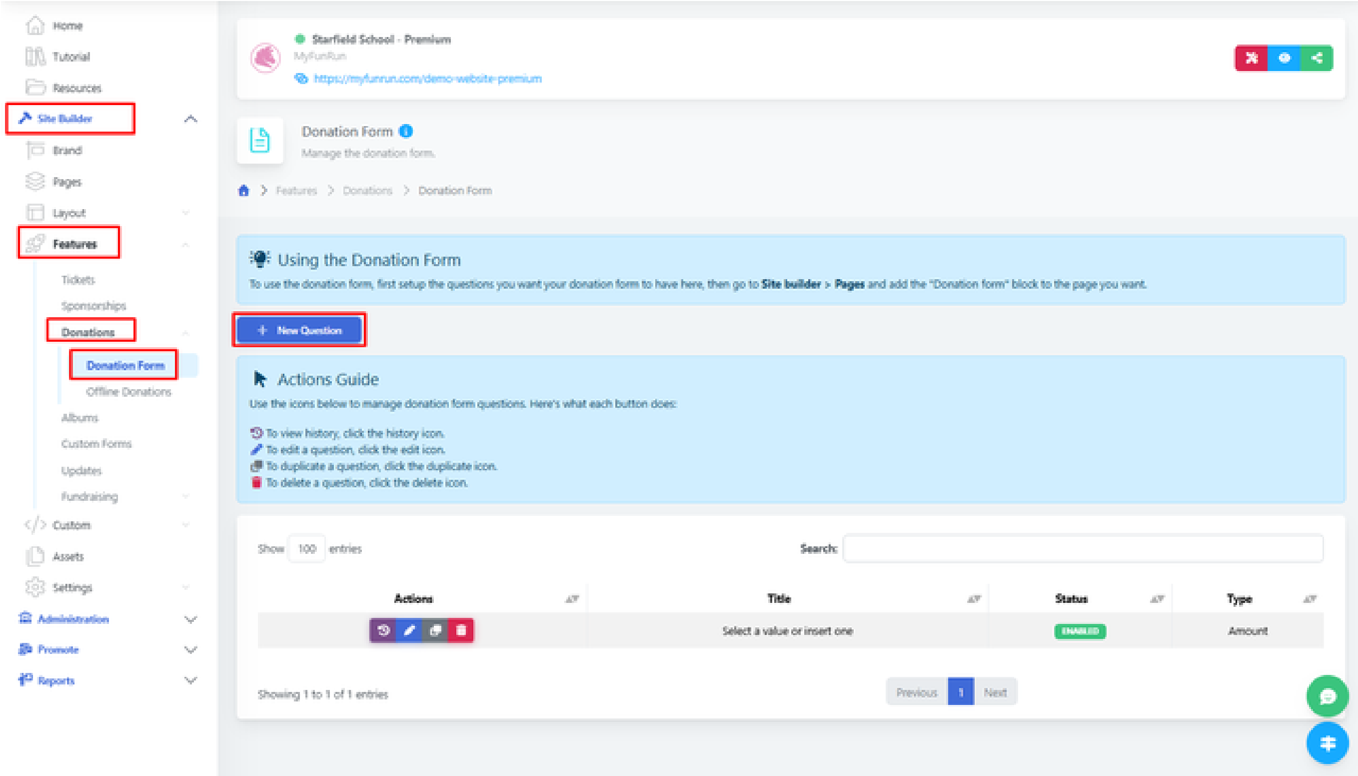
Why Add Custom Questions to Donations?

Custom questions on donation forms help you:

- Collect dedication or memorial information
- Understand donor motivations
- Gather employer information for matching gift programs
- Determine how donors heard about your cause
- Offer options for donation designation (general fund vs. specific programs)

Step 1: Set Up Your Donation Form

Navigate to your **Site Builder → Donations → Donation Form**



Step 2: Add a New Question

Click '**+ New Question**' to create a new question for donors.

Step 3: Configure Question Details

Set up your question with the following options:

- **Question Type:** Select the appropriate field type (text, dropdown, checkbox, etc.)
- **Question Text:** Write your question clearly
- **Required:** Decide if this question must be answered
- **Help Text:** Provide additional context or examples
- **Default Value:** Set a pre-filled answer if applicable

There are also premade questions that you can use with predefined options.

Common Custom Questions for Donations

Donation Dedication

- **Type:** Text Area
- **Question:** "Would you like to dedicate this donation? (Optional)"
- **Help Text:** "In honor of, in memory of, or in celebration of someone special."

Employer Matching

- **Type:** Text Input
- **Question:** "Employer Name (for matching gifts)"
- **Help Text:** "If your employer matches donations, please provide their name".

Donation Purpose

- **Type:** Dropdown or Radio Buttons
- **Question:** "Where would you like your donation to go?"
- **Options:** General Fund, Scholarship Fund, Equipment, Facilities, Specific Program Name

Communication Preferences

- **Type:** Checkboxes
- **Question:** "How can we stay in touch?"
- **Options:** Email updates, Quarterly newsletter, Annual report, Event invitations

How Did You Hear About Us

- **Type:** Dropdown
- **Question:** "How did you hear about this campaign?"
- **Options:** Social Media, Email, Friend/Family, Website, Event, Other

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Step 4: Arrange Question Order

Organize your questions in a logical flow
Use drag-and-drop to reorder questions

Step 5: Configure Question

Decide who sees the answers:

Status - Enabled: The question will be shown to the public
Status - Disabled: The question will be hidden from the public

Required - Yes: The user will be required to answer the question
Required - No: The question will be optional

Step 6: Test Your Donation Form

You can test your donation by creating an offline donation

To create an offline donation, you'll need to go to **Reports → E-Commerce → Donations**
Click on "Offline Donation" at the top right corner of the page
Complete the form and submit it
Check the report to ensure answers are captured in the system

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Viewing Donor Responses

To access custom question responses, go to **Reports → E-Commerce → Donations**

Click the details button on a specific donation to see the detailed answers from the form

or

Export the donation data to CSV or Excel using the "Download" button at the top right of the report page
Use reporting tools to analyze responses
Filter donors based on their answers

Best Practices

- Keep donation forms simple - too many questions can reduce conversions
- Make most custom questions optional unless truly necessary
- Be clear about how you'll use the information collected
- Respect donor privacy preferences
- Use conditional logic to reduce form clutter
- Test the complete donation experience on mobile devices
- Consider the timing - don't ask too much before they've donated
- Thank donors for providing additional information

Using Donor Data Effectively

- **Personalization:** Use donor preferences to personalize future communications
- **Segmentation:** Group donors by interests or giving preferences
- **Follow-up:** Send targeted follow-ups based on the donation purpose or interests
- **Reporting:** Analyze donor responses to improve future campaigns
- **Matching Gifts:** Use employer information to help donors complete matching gift requests

Integration with Thank-You Communications

Custom question responses are automatically included in automated thank-you emails.
Personalize a thank-you message.