Klubfunder

Help Guide

Donations Module

Standard Campaign

OCTOBER 10

1. What is the Donations Module ? 3
1.1 Sample Donations Fundraiser 3
2. Getting Started Donations 4
3. Fundraising Dashboard 5
3.1 Donation Campaign Lifecycle 6
4. Create Donation Campaign 7
4.1 Create New Donation Campaign 8
4.2 Changing Image on Donation Campaign 10
4.3 Review Donation Campaign 11
5. Active/Draft Fundraisers 13
5.1 Donation Display Card 13
6. Fundraiser Configuration Menu 14
7. Fundraiser Configuration Buttons 16
7.1 View Orders 17
7.2 Instalment Donations (SILVER PLAN and above) 20
7.3 Recurring Donations (SILVER PLAN and above) 22
8. Past Fundraisers 23
8.1 Archive Campaign 23
8.2 Unarchiving a Campaign 23
9. Find Payment 24
10. Refunds 28
11. Discount Codes 29
12. Reports 30
13. User Manager [Gold Member Option] 31
14. Public View : Finished Campaign 32

1. What is the Donations Module ?

The donations module allows clubs to accept donation payment for a number of causes. Typically a donations campaign will be set up to collect money for Covering Club Operating Costs, Supporting Community Programs, Buying or Maintaining equipment, Travel or Competitions or Facility Improvements. It proves a useful tool to deliver much needed funds. The donations module allows the set up of 2 types of donation fundraisers:

- Traditional Donation Fundraiser – Club Development Fund, Recurring Monthly Support Program , Club Trip or Club Facility
- Sponsorship Donation Campaign – a variation on the standard donation campaign that allows donations to be made against individuals.

This guide explains how to use the Donations Module to set up **a Standard Donations Campaign.**

1.1 Sample Standard Donations Fundraiser

This guide will walk through setting up the following sample.

Example Campaign - 2024 4G Pitch Rebuild Donations

Closes Sat, 1 Nov 2025 at 12:00am

Targte🎯 £20 of £20000 raised

Example Story

Join #TeamRebuild

We won't give up until everyone in our community has the facilities they need to thrive.

We are a small grassroots football club, FC Acme, dedicated to providing a safe and supportive environment for all players. Our current pitch is in desperate need of an upgrade, and with your help, we can build a new 4G pitch that will benefit the entire community.

By taking part in the 2022 Global Marathon for Rebuild, you can help us raise the necessary funds for this new pitch, ensuring that our players have a quality space to train and play.

You can find out more about our club and what we do here.

2. Getting Started Donations

You can get started with the event registration service by accessing it from your admin dashboard under the **Manage Donations ,Events ,Tickets and General Payments** panel as illustrated in Figure 1: Admin Dashboard.

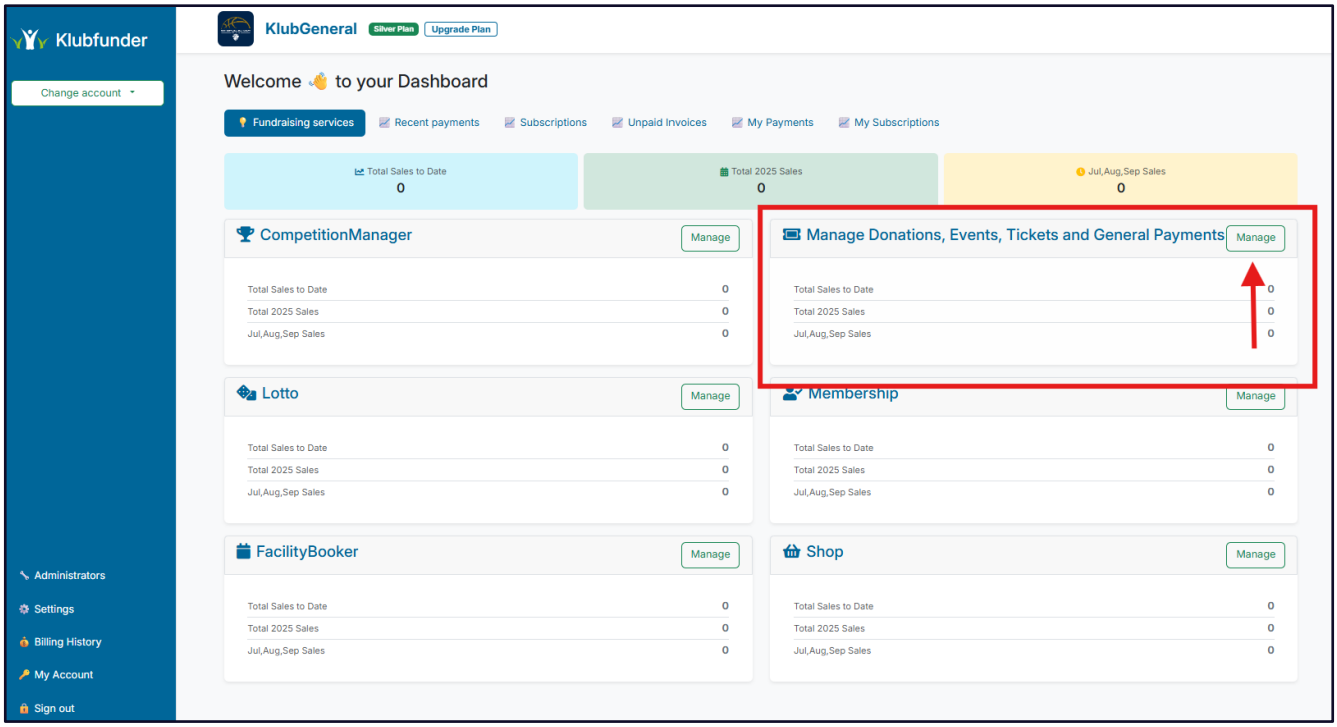


Figure 1: Admin Dashboard

If you click on the **Manage** button as highlighted in Figure 1 this will take you to the **Active Fundraisers Dashboard** screen.

3. Fundraising Dashboard

The fundraising dashboard is the main screen to manage all fundraisers for a club. When there are no fundraisers created the screen will appear as in Figure 1.

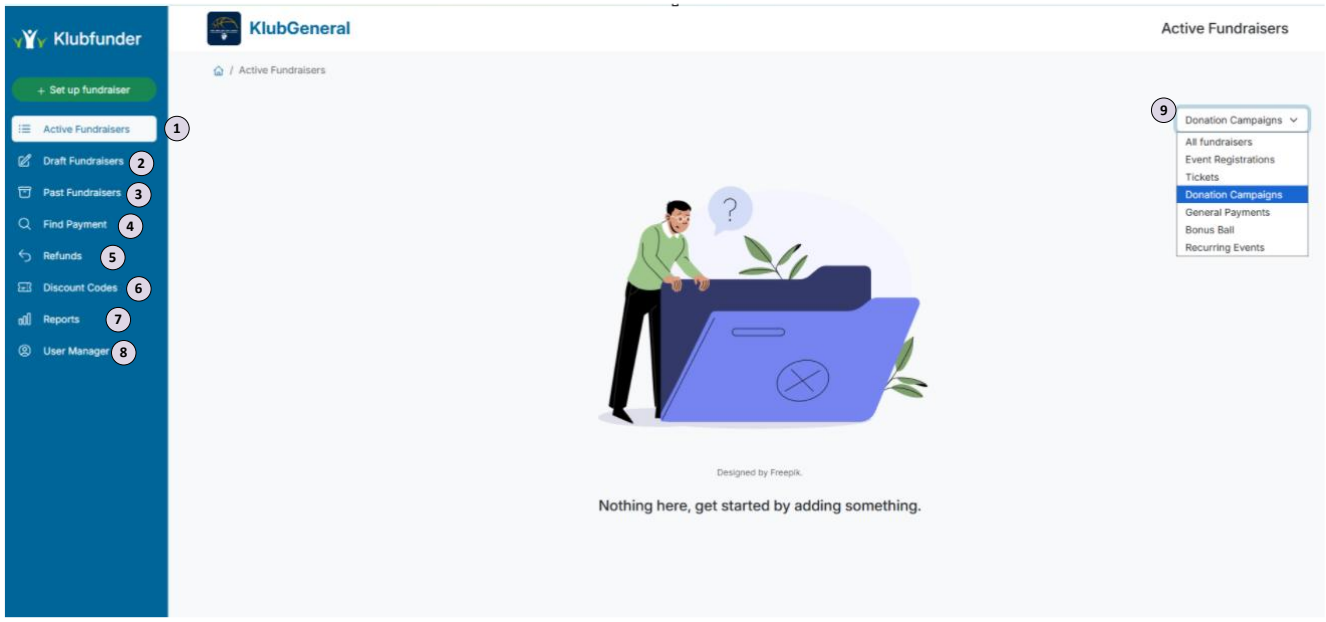


Figure 2: Fundraising Dashboard

Item	Description
1	**Active Fundraisers**: Any donation campaigns that are published will appear in this screen. When a campaign is published it means that the public will be able to see it online and will be able to make donations.
2	**Draft Fundraisers:** Any fundraisers that are **Saved as Draft** or **Marked as Draft** will appear in this screen. If a campaign exists in the draft fundraisers list it means that the public will not be able to see the campaign and will not be able to make donations.
3	**Past Fundraisers**: When a campaign is archived then it will appear in this list and it means the public will no longer see the campaign. Campaigns should always be archived once they are finished.

4	**Find Payment**: The admin can use this screen to search for any donation that has been made for the campaign. See Find Payment section of this document to understand how it works.
5	**Refunds:** The admin would use this screen to see any refunds that had been processed for donations. See Refunds section of this document to understand how it works.
6	**Discount Codes**: The admin would use this screen to set up discount codes any fundraisers created. The discount codes can then be sent to users by the admin so that the appropriate discount will be applied before the user purchases the product. [**Not Applicable to Donation Campaigns**]
7	**Reports**: By clicking on this menu option the admin will be presented with the fundraising reports. See Reports section of this document to understand how it works.
8	**User Manager [Gold Plan Only]:** This is used to set up users on the mobile app to take Stripe Tap to Pay payments or to take payments using Sum Up terminal.
9	**Fundraiser Filter :** By clicking on one of the items in this filter list the view will change to display those types of fundraisers only. If there are no fundraisers of the type selected in the filter then it will display nothing. The default filter is **All Fundraisers**.

3.1 Donation Campaign Lifecycle

When a fundraiser is set up on the platform is it important for the admin to adopt the following steps to ensure the efficient management of their dashboard.

- **Create the Donation Campaign** – go through the steps to enter all of the details about the fundraiser.
- **Save as Draft** – after completing the details of the fundraiser save as draft. This allows any changes to be made before making the fundraiser live.
- **Publish the Donation Campaign** – publishing the campaign from the Draft Fundraisers screen will allow the public to make donations for that campaign.
- **Archive the Donation Campaign** - once the campaign has finished it should be archived so that it no longer appears in the Active Fundraisers screen . This makes it much easier to manage active fundraisers.

4. Create Donation Campaign

Once on the dashboard the next step is to click on the Set up Fundraiser menu option highlighted by the symbol (1) in Figure 3. On the drop down menu that appears click on the **Donation Campaign** menu option as highlighted by the red box in Figure 2.

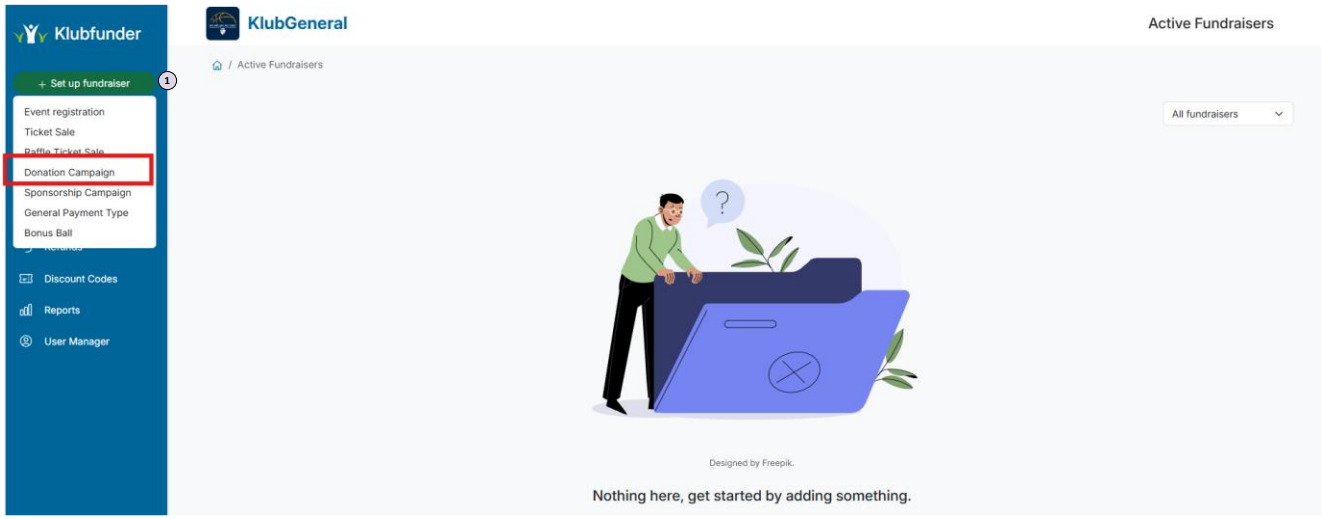


Figure 3: Active Fundraisers

This will then present you with the **Create New Donation Campaign** screen as displayed in Figure 4.

4.1 Create New Donation Campaign

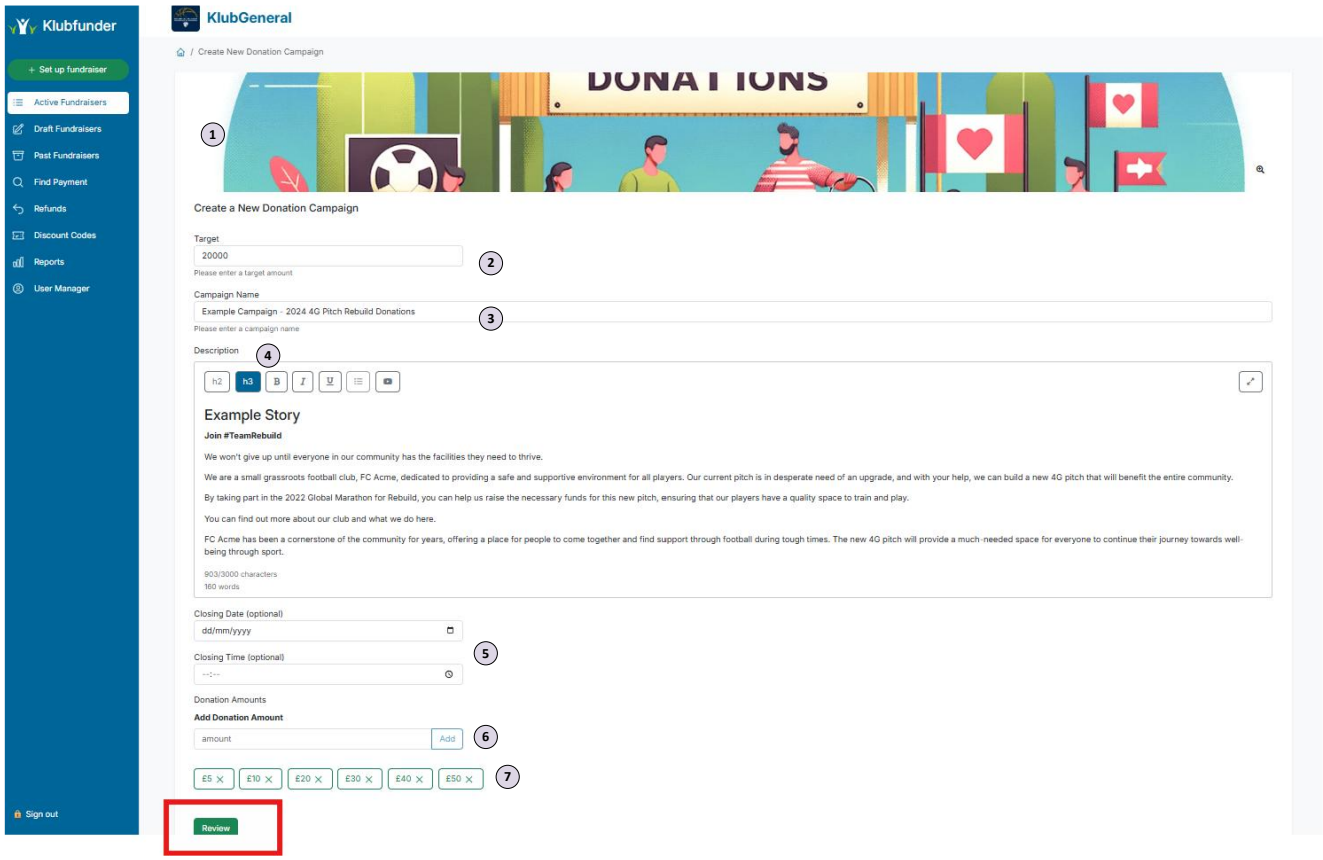


Figure 4 : Create Donation Campaign

The create donation campaign details screen allows you to add content to your donation campaign page. The table below gives a brief description of each of the options available on the screen.

Item	Description
1	Image upload control allows the user to change the image associated with the donation campaign.
2	A target amount that the club is hoping to raise through the donation campaign
3	Text box to enter the name of the donation campaign. This will be displayed in large bold text on the public page.
4	Rich text description area. Allows the user to enter text describing the event. The user can add some simple formatting such as headings ,bold text, bullet

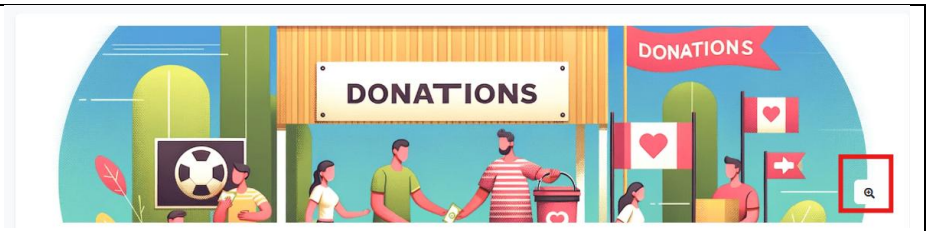
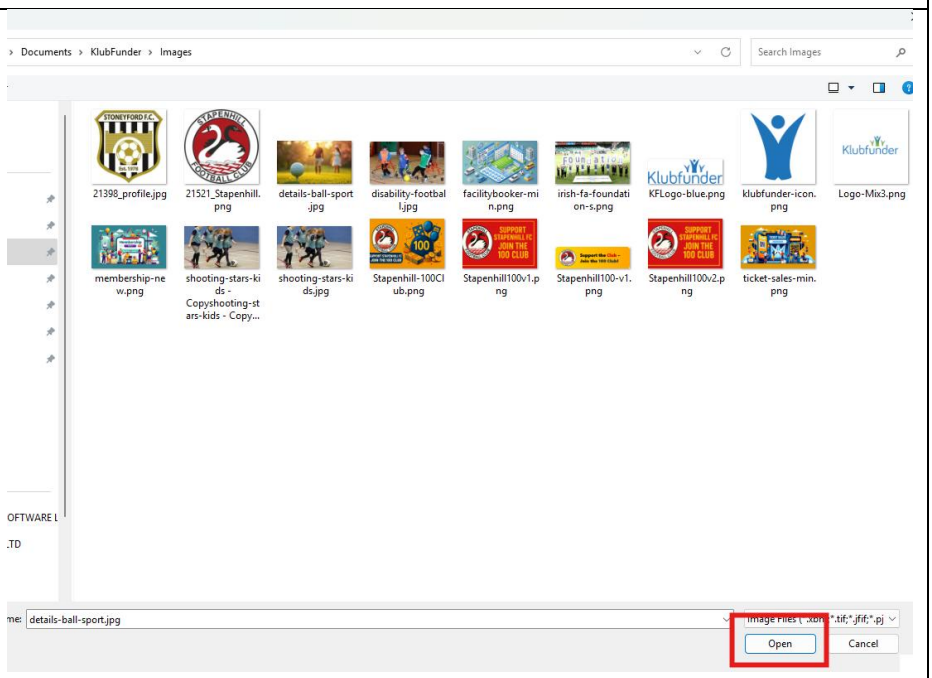
	points and underline. The admin can also add media links from you tube to provide a richer context for what the campaign is about.
5	The user can enter a closing date and time for the event. If a user enters a closing time then once that time is in the past, the system will prevent users from purchasing tickets and a message Online sales closed will appear on the event.
6	The **add donation amount** allows the admin to add custom donation amounts that can be collected.
7	The list of donation amounts will appear in the list. To remove any of the donation amounts the admin simply clicks on the relevant donation amount button.

💡 Tip

The content you enter for the donation campaign needs to provide a full context of what the purpose of the donation campaign is to encourage people to donate to the campaign.

4.2 Changing Image on Donation Campaign

The table below provides the steps for changing the image on the donation campaign.

Click on the magnifying glass as highlighted in the screenshot.	
This will allow you to upload an image from your own computer as shown. Once you have selected your image click on the open button as highlighted.	
The new image will replace the original one. To make the change you then click on the upload button highlighted within the red box.	

4.3 Review Donation Campaign

Once the donation campaign details have been completed then the admin can click on the **Review** button as highlighted by the red box in Figure 5. This will provide a preview of what the public page looks like to make sure that all the details are correct.

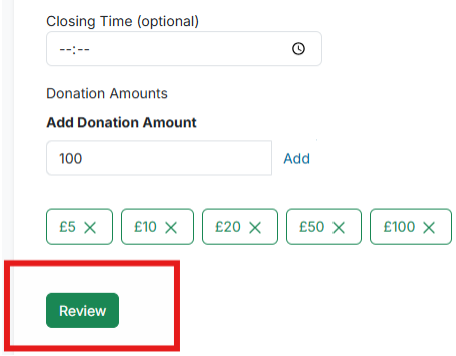


Figure 5 : Review Action

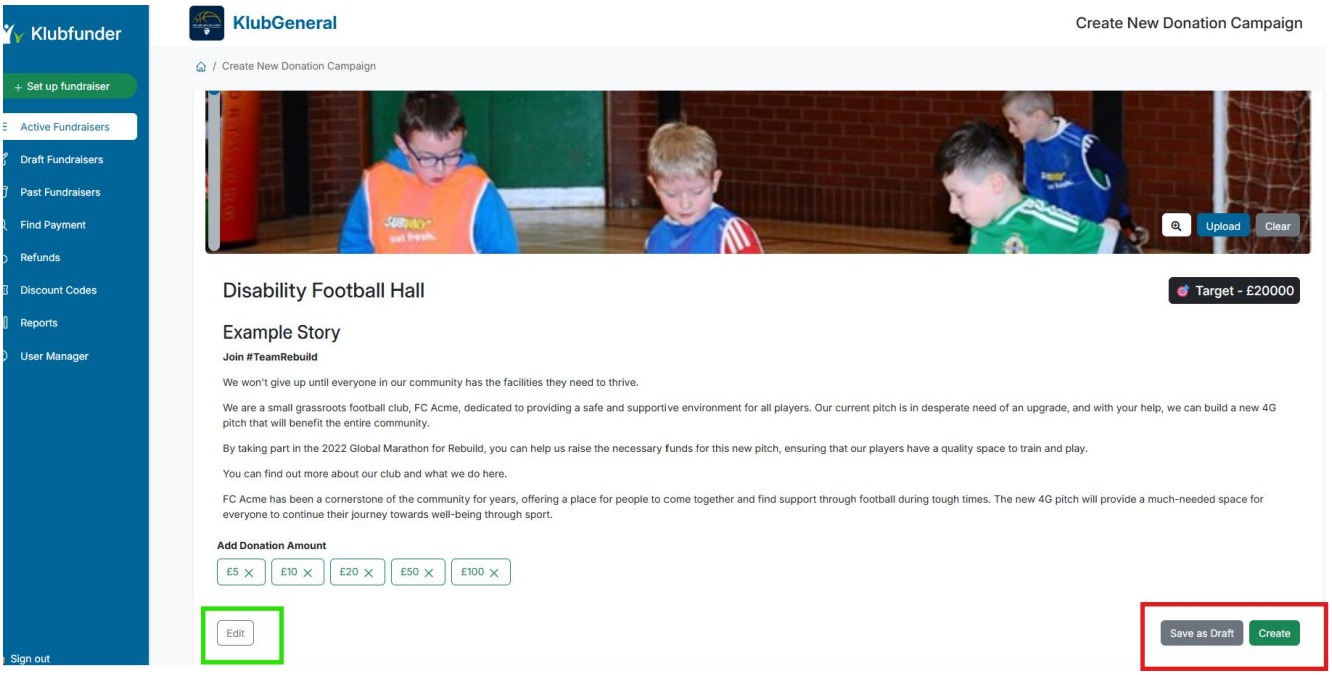


Figure 6 : Review Donation Campaign

From the review screen the admin can either **Edit** the details of the campaign (highlighted by the green box in figure 6) which will take them back to the previous screen. If they are happy that the details are correct they can either **Save as Draft** or **Create** (both highlighted by the

red box in Figure 6) . Clicking the **Save as Draft** will create the donation campaign but will store it in **Draft Fundraisers**. This is a temporary storage area that allows the admin to make further modifications at a later stage before finally publishing the donation campaign. By clicking the **Publish** option the campaign will be immediately available to the public allowing them to make donations.

> 💡 Tip
>
> It is advisable to always save the campaign as draft before publishing as it allows the admin to make a final check that all details are correct.

The next section will explain how to make changes to the campaign in Draft Fundraisers and how to make the campaign live from Draft Fundraisers.

5. Active/Draft Fundraisers

After a fundraiser has been created it will appear in the **Active Fundraisers** or **Draft Fundraisers** screen depending on what option was picked from the last step of the creation process **Save as Draft** or **Publish** (see Figure 6).

Once created Fundraisers are presented as cards on the screen, each offering several configurable options, also shown in Figure 7.

5.1 Donation Display Card

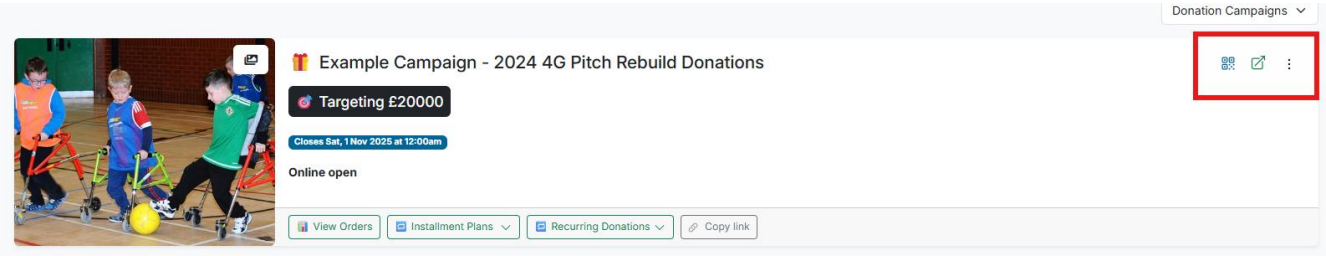


Figure 7 : Donation Display Card

The options in the red box are described in the table below.

Icon	Description
	QR Code generation Page – clicking on this icon will generate a QR code for the event that can be printed off and used in promotional flyers.
	Navigate to Public URL – clicking on this icon will open up a new tab in the browser and displays the sponsorship donation campaign as it appears to the people who will visiting the link to make donations. **NOTE** : If you click on this option from within **draft fundraisers** it will not show the donation campaign. The campaign needs to be published.
	Fundraiser configuration options – clicking on this icon will display a menu with configuration options. Each option is explained in the next section.

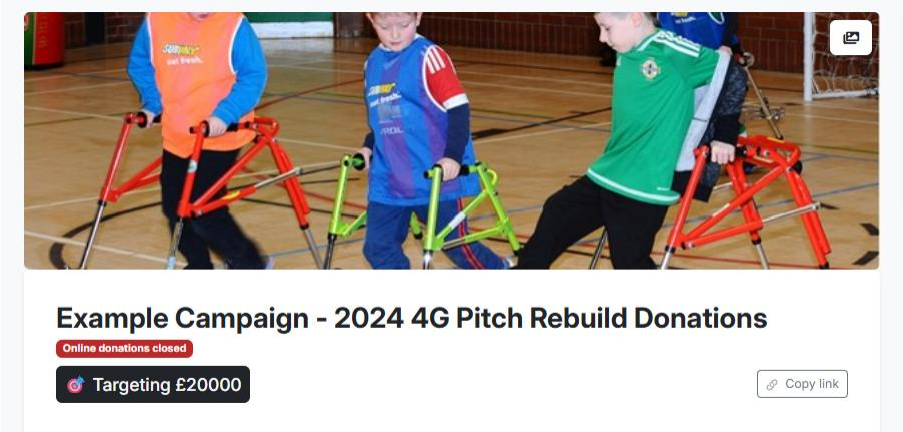
6. Fundraiser Configuration Menu

The fundraiser configuration menu is accessed by clicking on the icon as highlighted by the red box in Figure 8.

Figure 8 : Configuration Menu

The configuration menu has the following options:

Menu Item	Description
Edit Details	This option allows the image, name , description or time of the campaign to be changed.
Publish	This option is available when the donation campaign appears in the **Draft Fundraisers** list and will make the campaign available to the public for them to make donations. It will also move the campaign into the **Active Fundraisers** list.
Mark as Draft	This option is available when the donation campaign appears in the **Active Fundraisers** list and will remove the campaign from the public meaning they will not be able to make donations. It will also move the campaign into the **Draft Fundraisers** list.
Manage Sponsors	This option allows sponsors to be added to a donation campaign. **This is not required for a standard donation campaign**.
Close Online Sales / Open Online Sales	Clicking on **Close Online Sales** will prevent people from being able to make donations. After clicking this option the menu option will appear as **Open Online Sales** which allows the admin to re-open the campaign for donations.

	When the event is in the Close Online Sales state it will appear to the public with a online sales closed message as illustrated in the screen shot below. 
Export gift aid report	Clicking on this option will export all the data required to submit your HMRC gift aid return. If there are no gift aid donations the report will be empty. This allows CASC registered clubs or organisations with Charitable status to collect gift aid.
Clone	The clone option will create a complete copy of the campaign and then allow you to make changes on the cloned campaign. When using this function you will need to ensure that a new name is used for the new campaign.
View Public Page	Clicking on this option will open up a new tab and display the public page for the campaign.
Archive	Clicking on this option will take the campaign offline and move it to the **Past Fundraisers** list. From within the Past Fundraisers list a fundraiser can be unarchived which will bring it back online. It is also possible to clone a fundraiser from any past fundraiser which is useful for similar fundraisers that you run throughout the year.

7. Fundraiser Configuration Buttons

The fundraiser display card also has a set of configuration buttons as illustrated in Figure 9 by the green box.

NOTE: The copy link button, once clicked, will copy the public link of the campaign into the admins clipboard allowing them to paste into any promotional material.

Figure 9 : Configuration Buttons

The following sections describe the function of each of these buttons in more detail.

7.1 View Orders

When clicking on the **View Orders** button the display will show all of the people who have made a donation. As displayed in Figure 11.

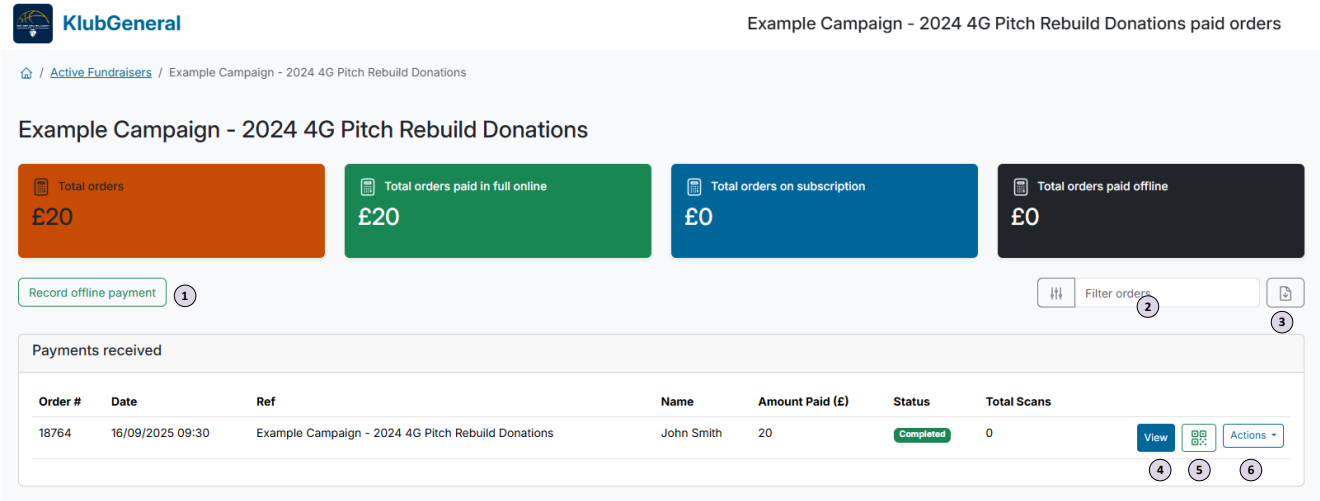
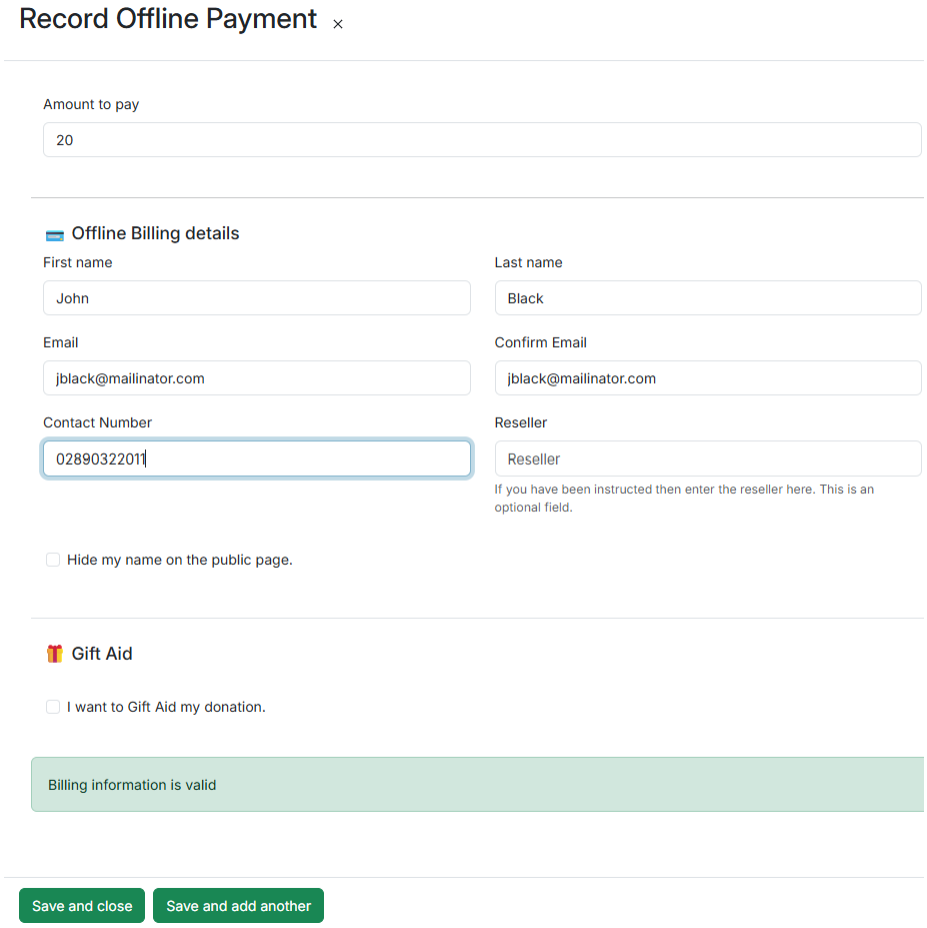


Figure 10 : View Orders

Item	Description
1	**Record Offline Payment :** clicking on this option will allow the admin to create a donation order. This is useful when clubs take cash payments from people as donations and they want to update their records so they can claim gift aid. The screen below displays the details that can be entered for the donation.

	
2	**Filter Textbox** : Used to search the list for specific orders. The filter will try and match the text as it is typed and will search the OrderId and Name fields.
3	**Create Order CSV Download** : clicking on this option will create a csv file of all of the order details.
4	**View :** clicking on this will display the payment details for the order. From this screen it is also possible to **Refund Order** which will refund the payment ,**Resend Confirmation** which resends the order email confirmation and **Issue Register to Club Request** which sends out an email request to the user asking them to register for the club. This is required in instances where a user is looking to change card details on a payment or so they can login and see their payment details.

<table>
<tr><td></td><td>
Order Number - 18764 Issue Register to Club Request ×
Order Details
<table>
<tr><td>Order ID</td><td>18764</td><td>Reference</td><td>Example Campaign - 2024 4G Pitch Rebuild Donations</td></tr>
<tr><td>Contact Name</td><td>John Smith</td><td>Email/Contact</td><td>john.smith@mailinator.com
02890322011</td></tr>
<tr><td>Order Date</td><td>16/09/2025, 09:30:15</td><td>Status</td><td>Completed</td></tr>
<tr><td>Cost</td><td>£20</td><td>Type</td><td>Donation</td></tr>
</table>
Sale Transaction
<table>
<tr><td>Transaction ID</td><td>Payment Provider</td><td>Provider Reference</td></tr>
<tr><td>1555</td><td>stripe</td><td>pi_3S7uHFJPphgKFrTC0fi6OtiX</td></tr>
</table>
Resend Confirmation Refund Order
</td></tr>
<tr><td>5</td><td>Create QR Scan Download : not applicable for this fundraiser.</td></tr>
<tr><td>6</td><td>Actions : This provides the Resend Confirmation and Issue Register to Club Request functionality as described for item 4.</td></tr>
</table>

7.2 Instalment Donations (SILVER PLAN and above)

The instalment plans configuration button dropdown has 3 options as illustrated in Figure 12. The options are **Enable 3 Monthly**, **Enable 6 Monthly** and **Advanced**.

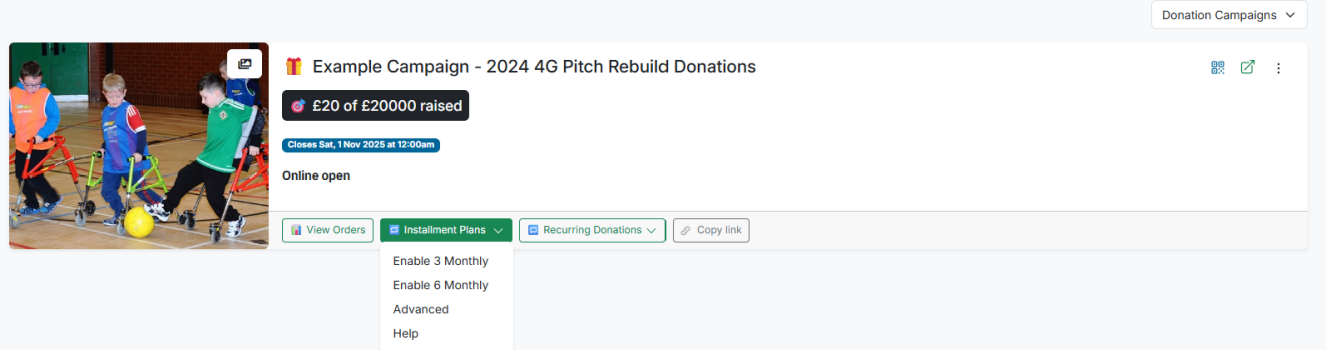
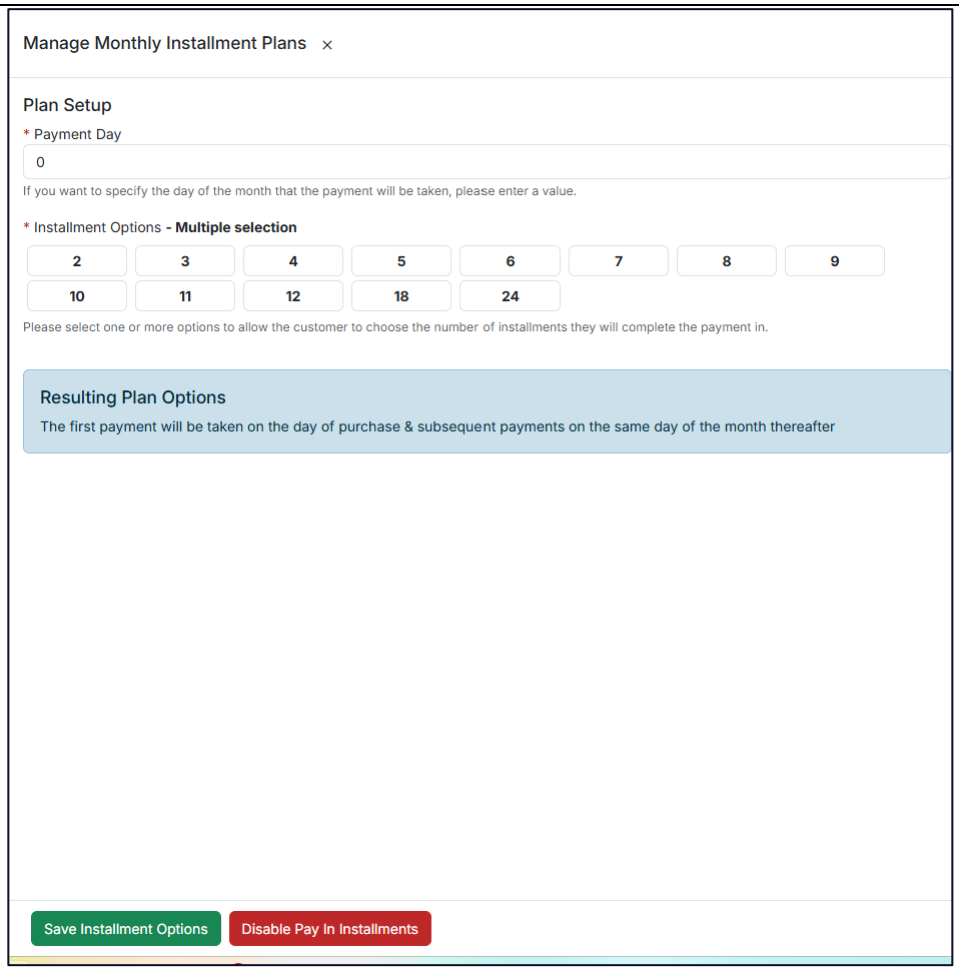


Figure 11: Instalment Plans Options

The table below describes each of the options.

Item	Description
Enable 3 Monthly (Disable 3 Monthly)	If the menu option displays **Enable 3 Monthly** then it indicates that the 3 monthly instalment plan is not enabled. Clicking this option will then enable 3 monthly instalments payment option. This means when a person goes to the checkout to make a donation they will see an option to make the donation using 3 monthly instalments. On the admin side the menu option will change from **Enable 3 Monthly** to **Disable 3 Monthly.** Indicating to the admin that to disable the 3 monthly instalment options they need to click the menu option.
Enable 6 Monthly (Disable 6 Monthly)	This option works in exactly the same way as the 3 Monthly option except instalments are for 6 months.
Advanced	Clicking on this will display all the instalment payment options available for configuration as illustrated by the screenshot below. The admin can set the **Payment Day** , a number of **Instalment Options** e.g. you could allow the user to pay in 3,6,9 or 12 monthly instalments. Finally if you want to switch off instalment payment options completely then you would click the **Disable Pay In Instalments** button.


Manage Monthly Installment Plans ×
Plan Setup
* Payment Day
0
If you want to specify the day of the month that the payment will be taken, please enter a value.
* Installment Options - Multiple selection
2
3
4
5
6
7
8
9
10
11
12
18
24
Please select one or more options to allow the customer to choose the number of installments they will complete the payment in.
Resulting Plan Options
The first payment will be taken on the day of purchase & subsequent payments on the same day of the month thereafter
Save Installment Options
Disable Pay In Installments

7.3 Recurring Donations (SILVER PLAN and above)

In order to configure a recurring donation, that is taken indefinitely unless cancelled then you would set up a recurring donation.

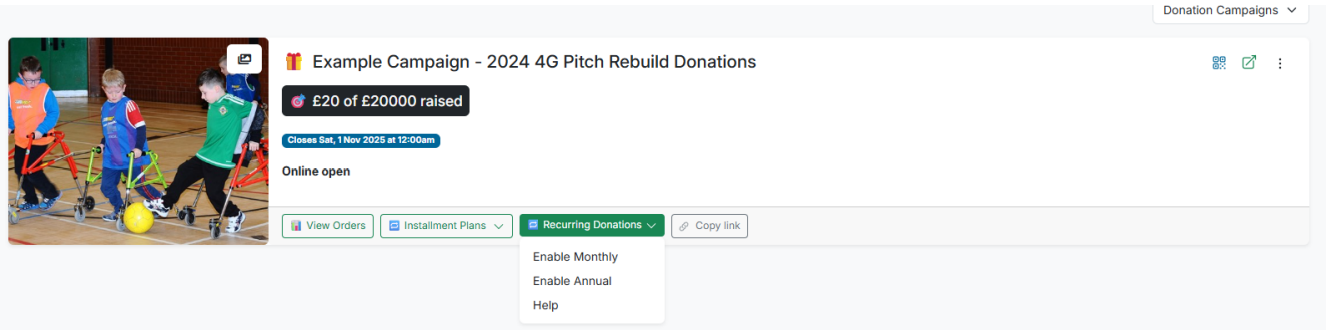


Figure 12: Recurring donations

Item	Description
Enable Monthly (Disable Monthly)	If the menu option displays **Enable Monthly** then it indicates that the monthly recurring plan is not enabled. Clicking this option will then enable monthly recurring plan. This means when a person goes to the checkout to make a donation they will see an option to pay a monthly recurring amount. On the admin side the menu option will change from **Enable Monthly** to **Disable Monthly.**
Enable Annual (Disable Annual)	This option works in exactly the same way as the Monthly Recurring option except the period is Annual, meaning payments are taken every year.

8. Past Fundraisers

8.1 Archive Campaign

To archive a campaign and send it to the Past Fundraisers list, the admin would access the Archive option from the card menu as displayed in the screenshot below.

NOTE : The Archive menu option is only available from the Active or Draft Fundraisers list.

The Archive function is accessed by first clicking on the card menu (highlighted by the red box in figure 13 and clicking on the Archive action (highlighted by the green box in figure 13).

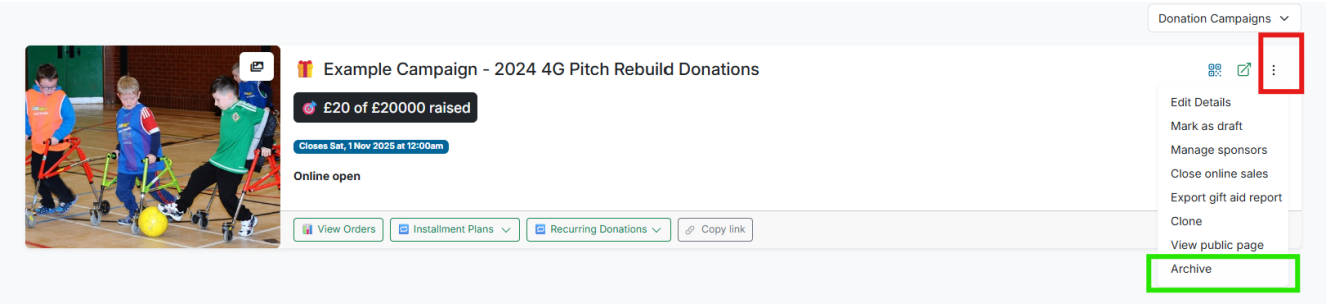


Figure 13 : Archiving Fundraiser

8.2 Unarchiving a Campaign

If an event has been archived it will appear in the Past Fundraisers menu option as highlighted by the orange box in figure 18.

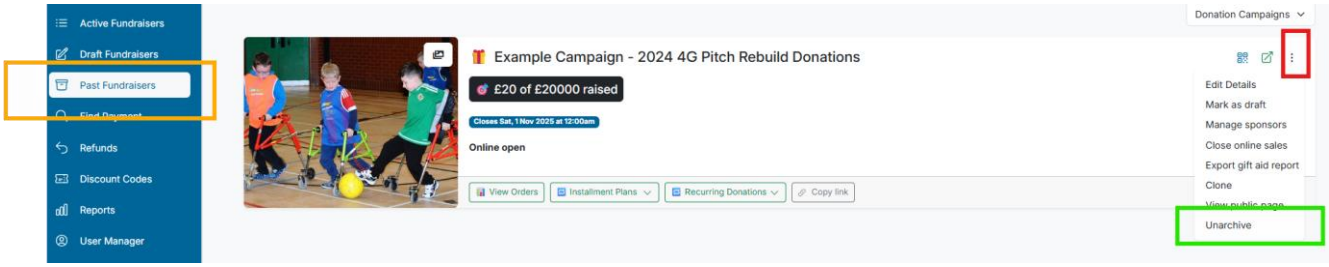


Figure 14 : Past Fundraisers Card

The campaign can be easily made active again by clicking on the card menu and selecting the unarchive action as highlighted by the green box in figure 14.

9. Find Payment

The **Find Payment** menu option allows the admin to be able to search for any donation payment that has been completed on the system. There are a number of options that can be used to find the payment as highlighted by the green box in Figure 15.

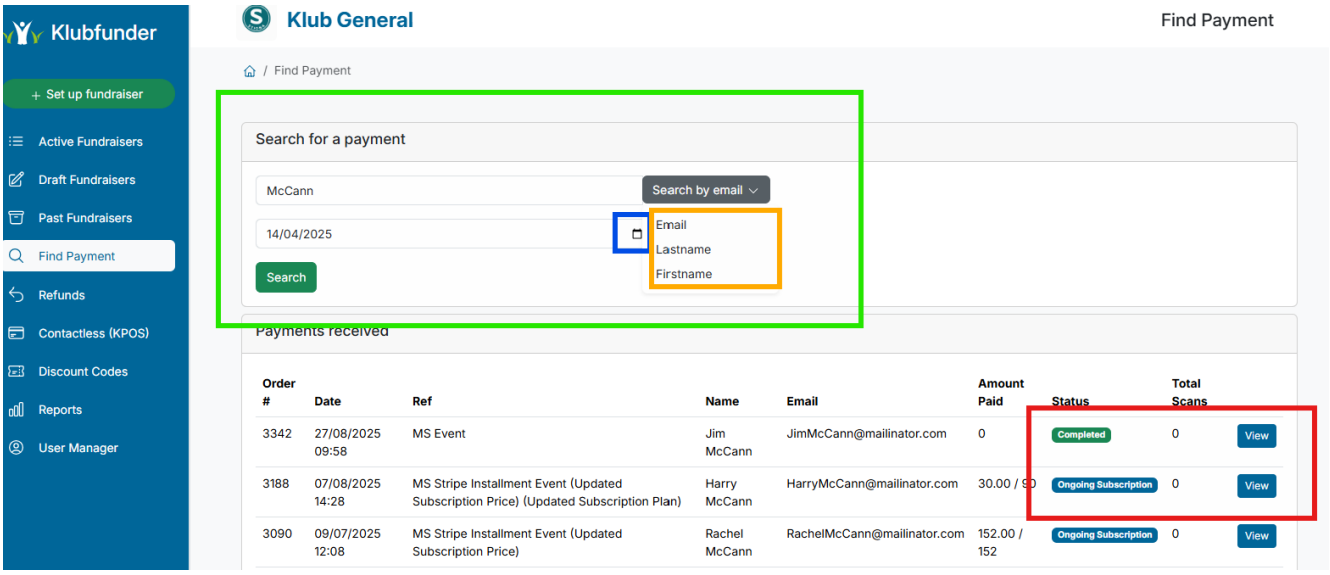


Figure 15 : Find Payment

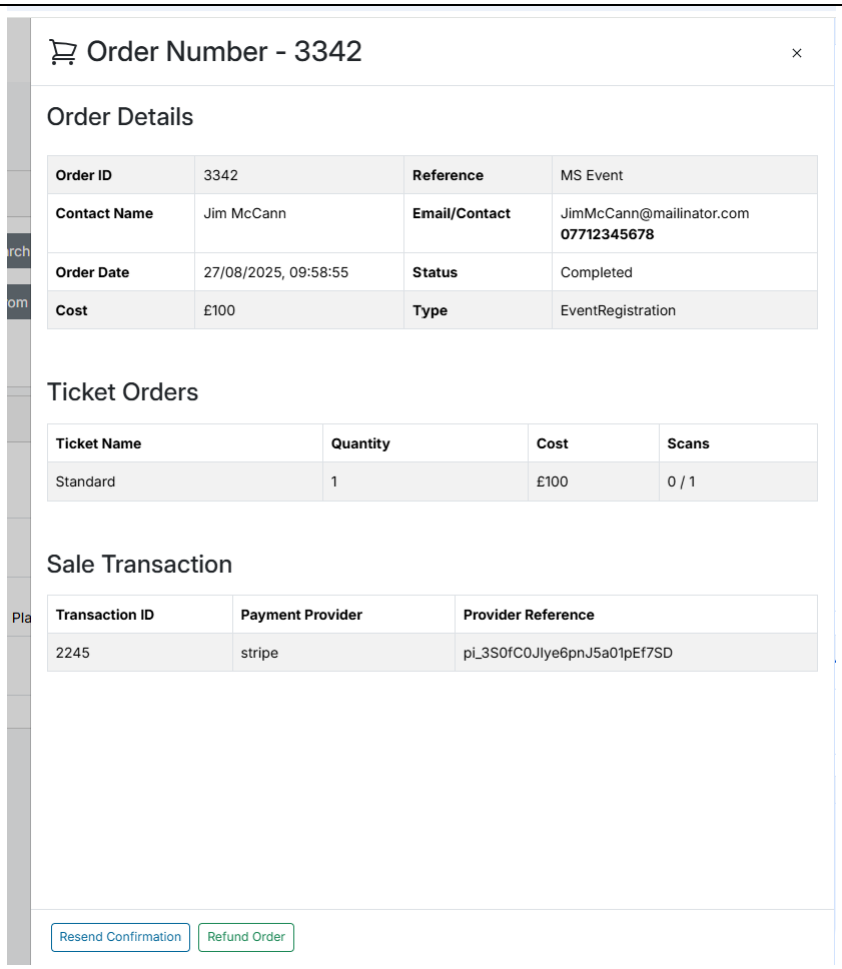
Item	Description
Search by Email Highlighted by orange box.	The email that is associated with the order. The search uses character matching so if the email is john.smith@mailinator.com then entering the value **john** would search all orders whose email had the string john in.
Search by Lastname Highlighted by orange box.	The lastname that is associated with the order. The search uses character matching so if the lastname is **smith** then entering the value **smi** would search all orders whose lastname had the string smi in.
Search by Firstname Highlighted by orange box.	The firstname that is associated with the order. The search uses character matching so if the firstname is **john** entering the value **joh** would search all orders whose email had the string joh in.

Set Date Highlighted by blue box.	This is used in conjunction with one of the search criteria above. By clicking on a date in the past the search will return all orders matching the search criteria as far back as that date set.

All orders that match the criteria will be returned in the search results and the admin can view the order details of each order returned in the result set by clicking on the View button as highlighted in the red box in Figure 15.

Depending on the status of the order then the order detail screen will show different text and actions. The table below describes the different views.

Item	Description
One off Payment Donation Order As indicated by status **completed** in Figure 15.	Clicking on the **view** button will display the following options. From within this screen the order can be refunded either in full or partially and the order receipt can be resent to the person.

<table>
<tr>
<td></td>
<td>


</td>
</tr>
<tr>
<td>Subscription Donation Payment Order

As indicated by status Ongoing Subscription in Figure 15.</td>
<td>Clicking on the view button will display the instalment order details screen. From within the view order subscription screen the following actions are available Resend Confirmation, Update Amount, Refund Order, Cancel Subscription and Pause Subscription.

Resend Confirmation – this will reissue the original order receipt email.

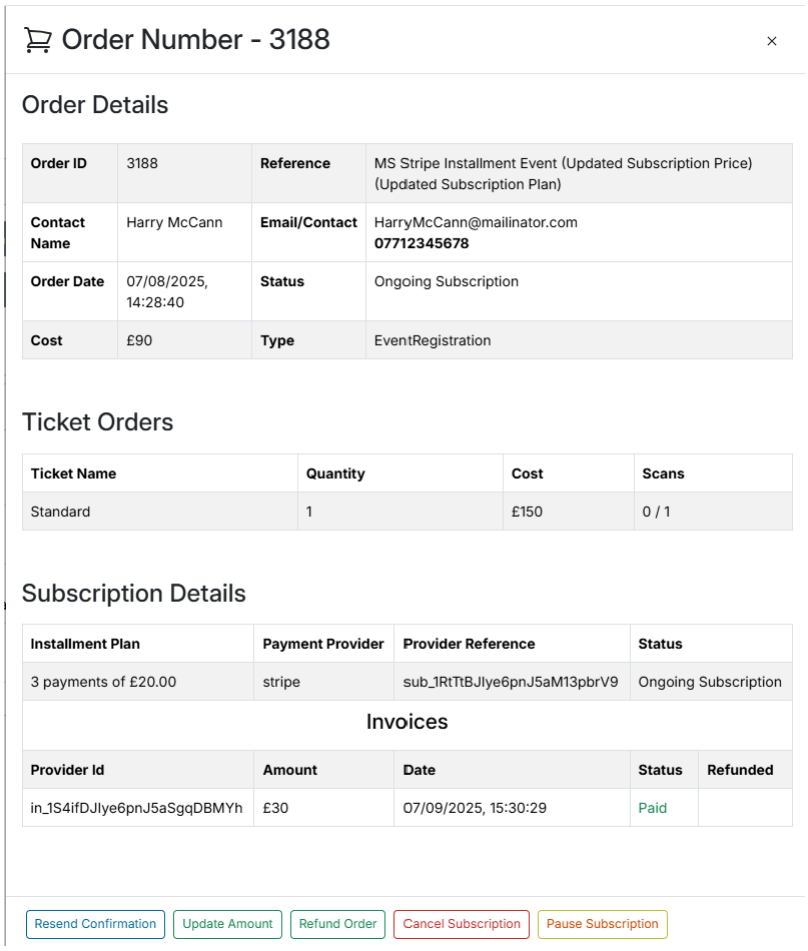
Update Amount – allows the admin to change the amount charged of future payments.

Refund Order- on an instalment payment this allows individual instalment payments to be refunded.

Cancel Subscription – this will ensure that no remaining payments on the subscription will be taken from the date it was cancelled. It</td>
</tr>
</table>

does not refund any payments that have already been taken as part of the subscription.

Pause Subscription – this allows the admin to pause payments on the subscription. If the pause is enabled for the whole duration of the subscription then no future payments will be taken. If there are 10 instalment payments for a subscription that start on September 1. If the subscription is paused on September 7 and then Un-Paused on November 25 the person will only have made 8 of the 10 payments when the subscription is completed.



Order Number - 3188

Order Details

Order ID	3188	**Reference**	MS Stripe Installment Event (Updated Subscription Price) (Updated Subscription Plan)
Contact Name	Harry McCann	**Email/Contact**	HarryMcCann@mailinator.com **07712345678**
Order Date	07/08/2025, 14:28:40	**Status**	Ongoing Subscription
Cost	£90	**Type**	EventRegistration

Ticket Orders

Ticket Name	Quantity	Cost	Scans
Standard	1	£150	0 / 1

Subscription Details

Installment Plan	Payment Provider	Provider Reference	Status
3 payments of £20.00	stripe	sub_1RtTtBJIye6pnJ5aM13pbrV9	Ongoing Subscription

Invoices

Provider Id	Amount	Date	Status	Refunded
in_1S4ifDJIye6pnJ5aSgqDBMYh	£30	07/09/2025, 15:30:29	Paid	

Resend Confirmation | Update Amount | Refund Order | Cancel Subscription | Pause Subscription

10. Refunds

The **Refunds** menu option provides the admin with a quick way to view any refunds that have made on donations. The list will show the summary details and the filter can be used to display items that match the text criteria typed into the filter box. The **view order** will show the details of the order and the refund.

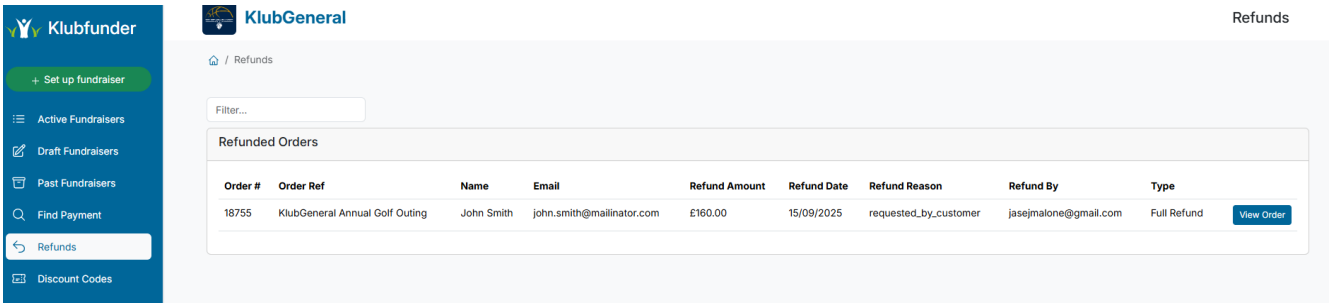


Figure 16: Refunds Display

11. Discount Codes

Not Applicable to Donations

12. Reports

The **Reports** menu option is an extendable dashboard that will be used to provide fundraising reports. The only report currently set up is one that displays the last 6 months sales figures for each fundraiser.

13. User Manager [Gold Member Option]

The **User Manager** menu option allows the admin to be able configure KPOS users. This will allow users to take donation payments using just their mobile phone if they are Stripe Tap to Pay or via sum Up terminals if they are sum up users.

14. Public View : Finished Campaign

The following screen shot displays the finished campaign and how it is presented to the public.

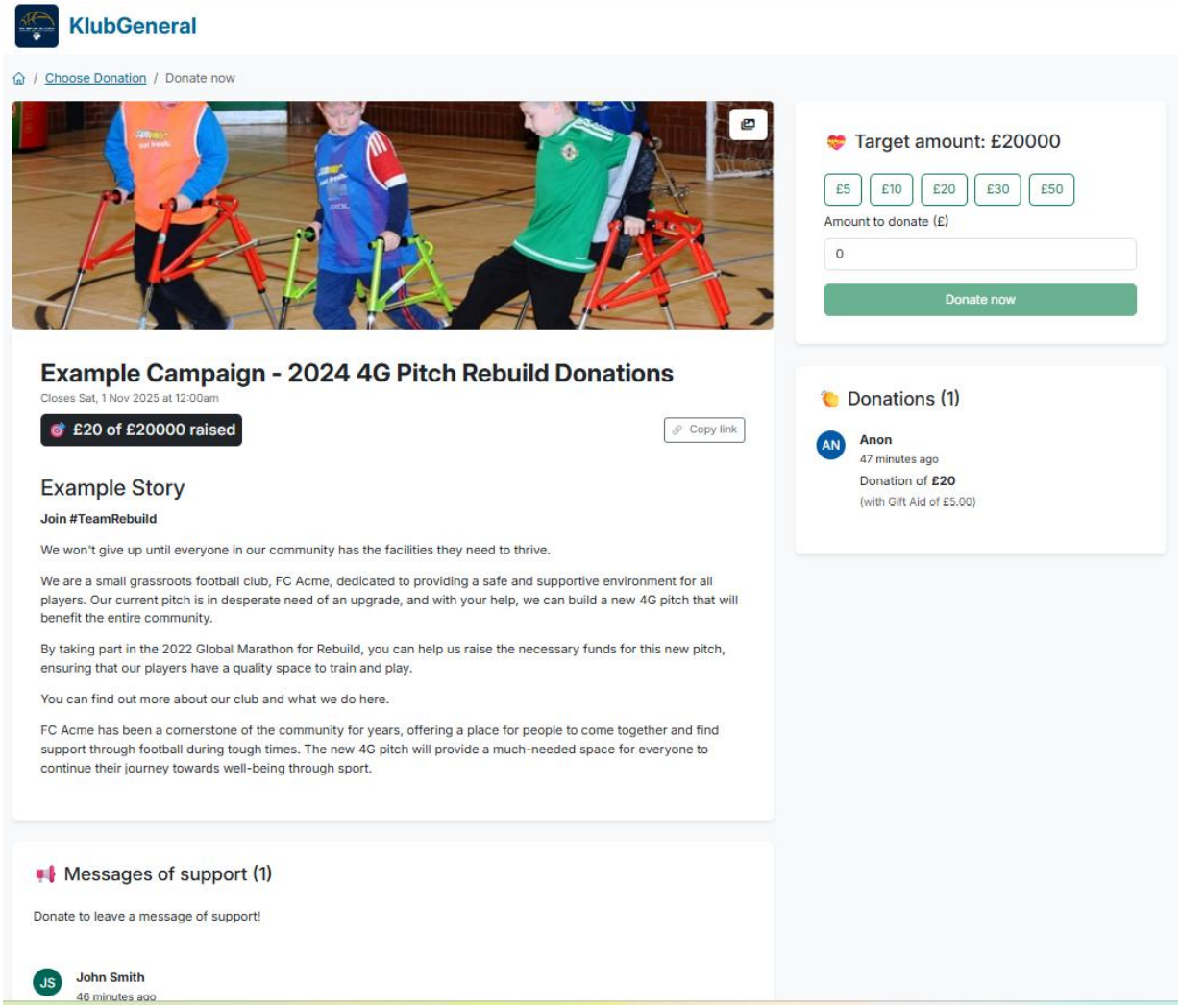


Figure 17 : Public Donation Campaign