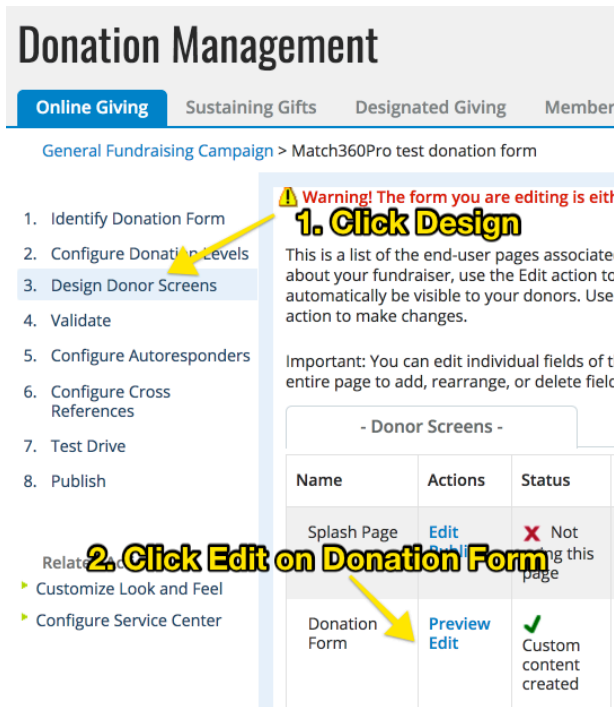


360MatchPro - Luminate Online (Convio) Integration

On Luminate/Convio, the install process involves adding a streamlined company search input, and adding our plugin on the confirmation page. Here are the steps:

1. Create a new test donation form to setup 360 on

Navigate to Donation Management and create a new donation form. The template doesn't matter: our plugin will work on any type of form / template. Name it something like "360MatchPro Test Form". Then, edit the form we just created and go to the donation form editor:



1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
 - a. Donation Form
4. Validate
5. Configure Autoresponders
6. Configure Cross References
7. Test Drive
8. Publish

Warning! The form you are editing is either published or in production.

The Form Designer shows the data elements that are available that you can add are shown in the window at the left. Select a portion of the page to Edit and Preview a selected element.

Select data elements to include in this form:

- General Page Fields
 - Page
 - Section Header
 - Buttons
 - HTML Caption
 - Transaction Summary
- Giving Patterns & Premiums
 - Flexible Sustainer Donation Level
 - Forever Sustainer Donation Level

New **Edit**

Click New

We will create a new custom field to store the company that the user searches for. Name the element exactly as follows: **Double the Donation Company ID**

Luminate Online™

* 1. Data Element Name:
Enter a name here to identify this field in administration.

* 2. Data Type:
Choose the type of data to collect in this element.

1. Enter exactly as shown

3. Require Choices:
For the Text, Number, and Monetary data types you can require choices. Yes, present a list of choices to the donors.
Enter the choices, one per line. These are the values that will be presented to donors. This is an opportunity to customize the labels for each choice.

 Yes, also let donors enter their own value.

* 4. Update Contact:
Select a contact record field where the donor's response will be saved.
 Do not save on donor's profile
 Save on an existing profile field

5. Luminate CRM Donation Field:
Select the Luminate CRM field to which you want to map this field.

2. Click Apply

Select data elements to include in this form:

- Political Attestation Fields
 - Attest Citizen
 - Attest Personal Credit Card
 - Attest Personal Funds
 - Attest Not a Corporation
 - Attest Not a Contractor
 - Attest Not a Minor
- Custom
 - Double the donation code
 - Mail Letter to Recipient

Arrange the order of the selected data elements:

- HTML Caption
- How did you hear about us
- Section Header
- Double the Donation Company ID
- Billing First Name
- Billing Last Name
- Billing Street 1
- Billing City
- Billing State/Province
- Billing Country

2. Add

3. Select the new element

4. Save Order and Edit

1. Select the newly created element under "Custom" section

5. Uncheck "Field is Visible"

6. Finish

Double the Donation Company ID

1. Is this field visible on the Donation form?
Choose this option to allow the user to see and edit this field.
 Yes, this field is visible.

2. Is this field visible in the Transaction Summary?
Choose this option to show the field in the summary.
 Yes, this field is visible in the transaction summary.

3. Donor Hint Message:
Enter any information that you would like to display when the donor clicks or tabs into this field.

4. Is this field required?
Choose this option to make this field required.
 Yes, this field is required.

5. Initial Value:
Enter the value that will be displayed in the field when the page is initially displayed.

Finish Save or Preview or Cancel

Select the new field (Double the Donation Company ID), and move it to the right by clicking “Add”. Then save order and edit the field, unchecking the “Field is visible” box. Then click finish. This adds an invisible element to the page that we will use to store the company that users search for.

2. Determining the value of the custom field we just created

We need to determine what custom field the “Double the Donation Company ID” field corresponds to in Luminare. This will allow us to use the correct values on the confirmation page. Follow these instructions:

Donation Management

Online Giving | Sustaining Gifts | Designated Giving | Membership Types | Donation

General Fundraising Campaign > Match360Pro test donation form

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
4. Validate
5. Configure Autoresponders
6. Configure Cross References
7. Test Drive
8. Publish

- Related Actions
- ▶ Customize Look and Feel
 - ▶ Configure Service Center

Warning! The form you are editing is either published or scheduled to be published automatically!

This is a list of the end-user pages associated with your form. If you plan remaining three pages will automatically be visible to your donors. Use t

Import and Edit Individual Fields of the Donation form from the P

1. Click Design Donor Screens

- Donor Screens -

| Name | Actions | Status |
|----------------|---|--------------------------|
| Splash Page | Edit Publish | ✗ Not using this page |
| Donation Form | Preview Edit | ✓ Custom content created |
| Thank You Page | Preview Edit | ✓ Custom content created |
| Page | Preview Edit | — Using default content |

[Next](#) or [Cancel](#)

2. Click Edit on Thank You Page

Donation Management

Online Giving | Sustaining Gifts | Designated Giving | Membership Types | Donation Reports | General Configurations

General Fundraising Campaign > Match360Pro test donation form > Thank You Page

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
 - a. Thank You Page
4. Validate
5. Configure Autoresponders
6. Configure Cross References
7. Test Drive
8. Publish

Warning! The form you are editing is either published or scheduled to be published automatically!

Use Plain Text Editor

1. Thank You Page Editor:
Use the HTML Editor to compose (or modify) the onscreen thank you message that will be shown to your

[Use Plain Text Editor](#) [Help](#)

Thank you

Dear **Object Property Value**,

Thank you so much for your donation! You've just given the

Path: h2

[Finish](#) or [Save](#) or [Cancel](#)

Warning! The form you are editing is either published or scheduled to be published automatically!

Click the first dropdown and select "Other"

1. Thank You Page Editor

Use the HTML Editor to compose (or modify) the onscreen thank you message that will be shown to your donors after they donate.

The screenshot shows the HTML editor interface. At the top, there are tabs for 'Personalization', 'Conditionals', 'Components', and 'Links'. The 'Personalization' tab is active, and a dropdown menu is open, showing options: 'Constituent', 'First Name', 'Last Name', 'Other', and 'Membership'. The 'Other' option is highlighted. Below the dropdown, there is a text area containing HTML code for a thank you message. The code includes a session name and a parameter for the first name, followed by an image tag for a thank you message and a paragraph of text.

Luminate Online™

Personalization Tag Selector

First select the type of field (field group) that you want to insert and click the Insert button to insert it into your text.

The screenshot shows the Personalization Tag Selector interface. It has a 'Field Group' dropdown menu with 'Select a Group Here' selected. Below it, there is a 'Field' dropdown menu with 'Email' selected. There is a checkbox labeled 'Put the tag in a conditional to test whether it is empty' which is checked. There is an 'Insert' button. A yellow arrow points to the 'Donation Custom Fields' option in the 'Field Group' dropdown menu.

Donation Custom Fields

Luminate Online™

Personalization Tag Selector

First select the type of field (field group) that you want to insert, then select the specific field and click the Insert button to insert it into your text.

Field Group:

Field:

1. Select DTD field

Put the tag in a conditional to test whether it is empty.

2. Insert

```
<convio:session name="51" param="reus_360matchpro_confirmation_page"></convio:session></p>
<convio:choose xmlns="http://www.convio.com">
  <convio:when title="Not empty" test="nempty">
    <convio:op>[[S120:dc:custom:custom_string13]]</convio:op>
    <convio:then>[[S120:dc:custom:custom_string13]]</convio:then>
  </convio:when>
  <convio:otherwise title="Empty"></convio:otherwise>
</convio:choose>
```

1. Copy this value that starts with [[S12]]. In this example, copy [[S120:dc:custom:custom_string13]] into the clipboard, we will use it in the next section. Then delete this entire code block that was added, we won't need it

2. Click finish

Finish Save or Cancel

Copy / make a note of the string that appears that looks like **[[S120:dc:custom:custom_stringXXX]]**. This is the string we need to populate the confirmation page with the company that the donor has searched for.

Be sure to delete the code blocks that were inserted at the end. We only needed to find out the **[[S120:dc:custom:custom_stringXXX]]** text.

3. Set up DTD code snippets in Luminate Pages

We need to setup three different reusable code snippets so that we can use them on multiple different forms. Create the following 3 **Luminate Reusable Pages** with corresponding code, replacing the bolded sections with the ones in your 360MatchPro setup document that we sent out, and also replacing the **[[S120:dc:custom:custom_string13]]** with the actual value we determined in the previous section. Instructions for actually creating the reusable pages are after the table.

| Reusable Page Name | Code |
|----------------------------------|---|
| reus_360matchpro_donation_widget | <pre> <script src="https://doublethedonation.com/api/js/ddplugin.js"></script> <link href="https://doublethedonation.com/api/css/ddplugin.css" rel="stylesheet" /> <p>Does your employer have a matching gift program? Please use the field below to find out.</p> <div id="dd-company-name-input"></div> <script type="text/javascript">// <![CDATA[Y.use('jquery-noconflict', function() { jQuery(document).ready(function(){ jQuery(document).on("doublethedonation_company_id", function () { var dtd_company_id = jQuery('input[name="doublethedonation_company_id"]').val(); jQuery("#double_the_donation_company_idhidden").val(dtd_compan y_id); }); }); }); //]]></script> </pre> </td> </tr> <tr> <td data-bbox="118 709 308 871">reus_360matchpro_plugin</td> <td data-bbox="308 709 877 871"> <pre> <script type="text/javascript">// <![CDATA[var DDCONF = { API_KEY: "360MatchPro Public Key" }; //]]></script> <script src="https://doublethedonation.com/api/js/ddplugin.js"></script> <link href="https://doublethedonation.com/api/css/ddplugin.css" rel="stylesheet" /> <div id="dd-container"></div> </pre> </td> </tr> </tbody> </table> </div>]]></pre> |

| | |
|--|---|
| reus_360matchpro_c onfirmation_page | <pre> <script type="text/javascript">// <![CDATA[Y.use('jquery-noconflict', function (Y) { //hides monthly giving duration options; and sets duration to no end date jQuery(document).ready(function () { var domain = doublethedonation.integrations.core.strip_domain("[[S120:dc:email]]") ; doublethedonation.plugin.load_config(); doublethedonation.plugin.set_donation_id("[[S120:dc:transactionID]]") ; doublethedonation.plugin.set_donation_campaign("[[S120:dc:donatio nFormName]]"); doublethedonation.plugin.email_domain(domain); if ("[[S120:dc:custom:custom_string13]]") { doublethedonation.plugin.set_company("[[S120:dc:custom:custom_st ring13]]"); } doublethedonation.integrations.core.register_donation({ "360matchpro_public_key": "360MatchPro Public Key", "campaign": "[[S120:dc:donationFormName]]", "donation_identifier": "[[S120:dc:transactionID]]", "donation_amount": "[[S120:dc:giftAmount]]", "donor_first_name": "[[S120:dc:firstName]]", "donor_last_name": "[[S120:dc:lastName]]", "donor_email": "[[S120:dc:email]]", "doublethedonation_company_id": "[[S120:dc:custom:custom_string13]]", "doublethedonation_status": null }); }); }); //]]></script> </pre> </td> </tr> </table> </div> <div data-bbox="112 821 523 839" data-label="Text"> <p>The steps to add each reusable page is as follows:</p> </div>]]></pre> |
|--|---|

PageBuilder

Click New Page

PageBuilder PageBuilder Reports General Configurations

Page Library

Create a New Page

Create a Single Component Page

Manage Content Folders

PageBuilder

PageBuilder PageBuilder Reports General Configurations

Page Library > Create a New Page

- 1. Identify Page
- 2. Identify Version
- 3. Select Page Layout & Add Content
- 4. Approve & Publish

Related Actions
▶ Manage Content Folders

Add a name

* 1. Name:
The name of the Page is used internally and displays on the Page List that is visible to administrators. The name.

360matchpro_donation_widget

2. Description:
The description of the Page is used internally and displays with the Page name on the Page List to help

3. Security Category:
The Security Category selected here will determine which administrators can author and/or manage this

General

4. Page Type:
The Page Type determines whether this page is displayed to administrators or users.

- Administrators
- Users

Page Wrapper:
Select your desired Page Wrapper. Page Wrappers are managed from Page Wrapper Editor in Setup. Choose

- Use the default Page Wrapper
- Override the default Page Wrapper

5. Content Folder:
A Content Folder enables you to group this Page with other similar Pages in the Page List to make it easier to create new Content Folders.

Top Level Folder

6. Page Properties:
The options below determine special conditions for how this Page may be used and viewed by constituents.

- This is a secure Page that will be encrypted via SSL.
- This is a reusable Page that can be embedded in an HTML Component in other Pages.

7. Direct URL for this page:
The direct URL is the Web address of this Page. The system displays it below after you Save this Page.

Next Save or Cancel

Check this box

Click Next

PageBuilder

PageBuilder PageBuilder Reports General Configurations

Page Library > 360matchpro_donation_widget

- 1. Identify Page
- 2. Identify Version
- 3. Select Page Layout & Add Content
- 4. Approve & Publish

1. Version Name:
The name of the Version can help identify, in the Page Version List, the number of times the page has been updated.

2. Page Title:
The title of the Page displays on the Web browser of constituents viewing this Page.

3. Search Keywords:
Constituents will not see the keywords or phrases entered here but they can use them to search for the page.

4. Page Meta Description:
The Meta Description is placed in the HTML for your Page to provide a description to people who are performing a search.

5. Additional Meta Tags:
Additional Meta data tags can be placed in the HTML for your Page to provide more character set for displaying the page.

Click Next



Next Save or Cancel

PageBuilder

PageBuilder PageBuilder Reports General Configurations

Page Library > 360matchpro_donation_widget > Double the Donation - 03/29/2017, v1

- 1. Identify Page
- 2. Identify Version
- 3. Select Page Layout & Add Content
- 4. Approve & Publish

1. Page Layout:
The layout determines the number and placement of columns on your page. If you have a layout that is not displayed, click the Show All Layouts link. Click the information icon for more details.

Favorite Layouts

- Single component page
- 2 columns laid out in 5 rows



Show All Layouts

2. Page Content:
The content consists of the components that you select for display on the page. Click the Add Content button to select components for display on the page.

Add Content

Click Next



Next Save or Cancel

PageBuilder

PageBuilder PageBuilder Reports General Configurations

Click Publish Now

- 1. Identify Page
- 2. Identify Version
- 3. Select Page Layout & Add Content
- 4. Approve & Publish

- Related Actions
- Preview
 - Accessibility Report

1. Publish Page:
To make this Version available to constituents, click the Publish Now button to save the page as a Draft state (for example, if you plan to add more content later).

Publish Now

Finish

Save

or

Cancel

Records 1 - 20 of 76 [First](#) [Previous](#) [Next](#) [Last](#)

Q Search

Show All

Page 1 of 4

To Page

| <input type="checkbox"/> | Page | Action | Status | Category | Last Modified |
|--------------------------|-----------------------------|--|-----------------|----------|---------------------------------|
| <input type="checkbox"/> | 360matchpro_donation_widget | Preview Manage Edit Content Edit Attributes Copy | Active Reusable | General | 03/29/2017 2:39 PM by Kanwei Li |

Click Edit Content

WARNING! You are editing the active version!

- Donation Thermometer
- Event Calendar
- HTML Content**
- Image
- Quick Registration
- Report Results Chart
- StoryBuilder Headline
- Survey
- TeamRaiser List

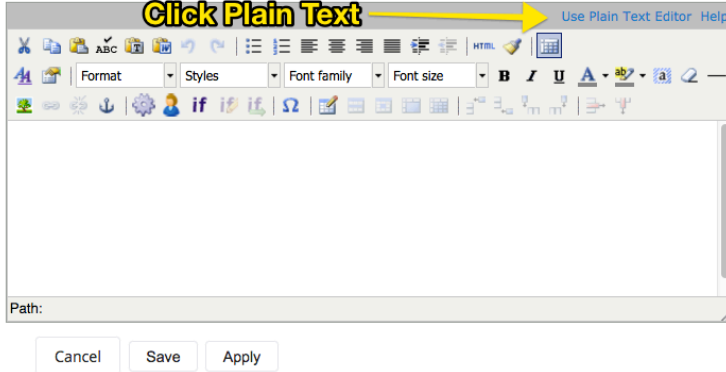
Click double arrow button, then select HTML Content

Luminate Online™

HTML Component

1. HTML Content:

Enter the HTML content that you would like to display to your constituents. You can include text, images, personalized content, and links. Use the Save button frequently to save your work when editing your content.



4. Adding streamlined company search on donation form

Navigate to the form you want to put the donation form on, and edit the “Donation Form”.

Donation Management

Online Giving Sustaining Gifts Designated Giving Member

General Fundraising Campaign > Match360Pro test donation form

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
4. Validate
5. Configure Autoresponders
6. Configure Cross References
7. Test Drive
8. Publish

Warning! The form you are editing is either not visible or not published.

1. Click Design

This is a list of the end-user pages associated with your fundraiser, use the Edit action to automatically be visible to your donors. Use the Publish action to make changes.

Important: You can edit individual fields of the entire page to add, rearrange, or delete fields.

| - Donor Screens - | | |
|-------------------|---|------------------------|
| Name | Actions | Status |
| Splash Page | Edit | Not visible |
| Donation Form | Preview Edit | Custom content created |

2. Click Edit on Donation Form

In the editor, move the “Double the Donation Company ID” custom field to the right (doesn't matter where it is in the order of the list). Click on **Save and Edit**, and set the field to NOT visible:

Select data elements to include in this form:

- Page
- Section Header
- Buttons
- HTML Caption
- Transaction Summary
- Giving Patterns & Premiums
 - Flexible Sustainer Donation Level
 - Forever Sustainer Donation Level
 - Installment Plan Donation Level

Arrange the order of the selected data elements:

- Standard Donation Level
- HTML Caption
- How did you hear about us
- Section Header
- Double the Donation Company ID
- Billing First Name
- Billing Last Name
- Billing Street 1
- Billing City

Buttons: Add >, < Remove, Save Order and Edit Selected

Previous Data Element | Double the Donation Company ID | Next Data Element

Edit Data Element | Preview Data Element

Edit this element type definition

If you make changes to the element type definition using this link, those changes will be applied to this form and changes you have already made to this form will be saved at the same time.

1. Is this field visible on the Donation form?
Choose this option to allow the user to see and edit this field.
 Yes, this field is visible. **2. Make sure this is unchecked**
2. Is this field visible in the Transaction Summary?
Choose this option to show the field in the summary.
 Yes, this field is visible in the transaction summary.

Next, add an "HTML Caption" field and add in the "reus_360matchpro_donation_widget" reusable page. Place this field where you want the streamlined search to appear. We recommend including it somewhere in the billing section.

| Component Types | Components | | | | | | | | | | | | | | | |
|--|---|-------------|---------|-------------|-----------------|--------|--|------------------------------------|--------|--|----------------------------------|--------|--|-------------------------|--------|--|
| <ul style="list-style-type: none"> Personal Event Solicited Content <ul style="list-style-type: none"> Qualified Contribution Specific Contribution Time-Based Contribution Specific Solicitation Content <ul style="list-style-type: none"> Reusable Page Image Document Link Application Images RSS Link Donation Donations | <p>Records 1 - 10 of 39 First Previous Next Last</p> <p>Q Search Show All</p> <p>Page 1 of 4 To Page</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Actions</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>adminnavigation</td> <td>Insert</td> <td></td> </tr> <tr> <td>reus_360matchpro_confirmation_page</td> <td>Insert</td> <td></td> </tr> <tr> <td>reus_360matchpro_donation_widget</td> <td>Insert</td> <td></td> </tr> <tr> <td>reus_360matchpro_plugin</td> <td>Insert</td> <td></td> </tr> </tbody> </table> | Name | Actions | Description | adminnavigation | Insert | | reus_360matchpro_confirmation_page | Insert | | reus_360matchpro_donation_widget | Insert | | reus_360matchpro_plugin | Insert | |
| Name | Actions | Description | | | | | | | | | | | | | | |
| adminnavigation | Insert | | | | | | | | | | | | | | | |
| reus_360matchpro_confirmation_page | Insert | | | | | | | | | | | | | | | |
| reus_360matchpro_donation_widget | Insert | | | | | | | | | | | | | | | |
| reus_360matchpro_plugin | Insert | | | | | | | | | | | | | | | |

1. New HTML Caption

2. Click --Components-- and add Reusable Page

3. Add donation_widget

HTML Caption

Next Data Elem

your form.) Note that this section of content will expand to fit the entire width of the donation form.

-- Personalization -- | -- Conditionals -- | -- Components -- | -- Links --

```
<p><convio:session name="51" param="reus_360matchpro_donation_widget"></convio:session></p>
```

Save the page, and Preview it, making sure that our plugin appears on the the form. If it doesn't, contact support at support@doublethedonation.com.

5. Embedding the matching gift widget on the confirmation page (Thank You Page)

Finally, we'll add the code to show our matching gift widget, and code to submit the donation information to Double the Donation. Navigate to **Design Donor Screens -> Thank You Page**:

Donation Management

Online Giving | Sustaining Gifts | Designated Giving | Membership Types | Donation I

General Fundraising Campaign > Match360Pro test donation form

Warning! The form you are editing is either published or scheduled to be published automatically!

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
4. Validate
5. Configure Autoresponders
6. Configure Cross References
7. Test Drive
8. Publish

Related Actions

- Customize Look and Feel
- Configure Service Center

This is a list of the end-user pages associated with your form. If you plan remaining three pages will automatically be visible to your donors. Use the Import and Edit individual fields of the Donation form from the Page

1. Click Design Donor Screens

- Donor Screens -

| Name | Actions | Status |
|----------------|---|--------------------------|
| Splash Page | Edit Publish | ✗ Not using this page |
| Donation Form | Preview Edit | ✓ Custom content created |
| Thank You Page | Preview Edit | ✓ Custom content created |
| Thank You Page | Preview Edit | ✗ Using default content |

2. Click Edit on Thank You Page

[Next](#) or [Cancel](#)

Then switch to Plain Text Editor mode:

Donation Management

Online Giving | Sustaining Gifts | Designated Giving | Membership Types | Donation Reports | General Configurations

General Fundraising Campaign > Match360Pro test donation form > Thank You Page

Warning! The form you are editing is either published or scheduled to be published automatically!

Use Plain Text Editor

1. Thank You Page Editor:
Use the HTML Editor to compose (or modify) the onscreen thank you message that will be shown to your donors.

[Use Plain Text Editor](#) [Help](#)

Thank you

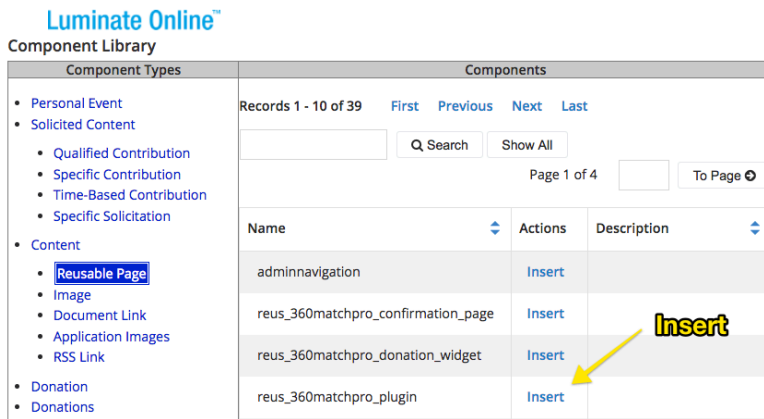
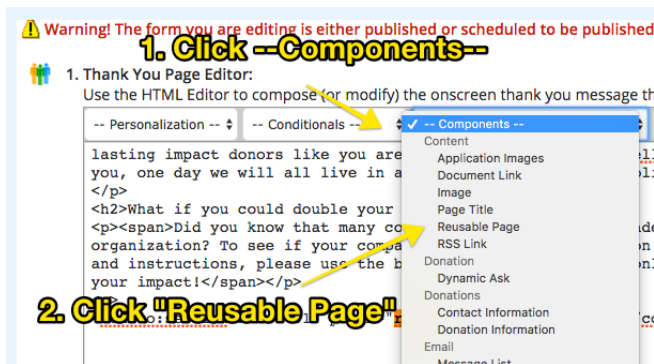
Dear **Object Property Value**,

Thank you so much for your donation! You've just given the

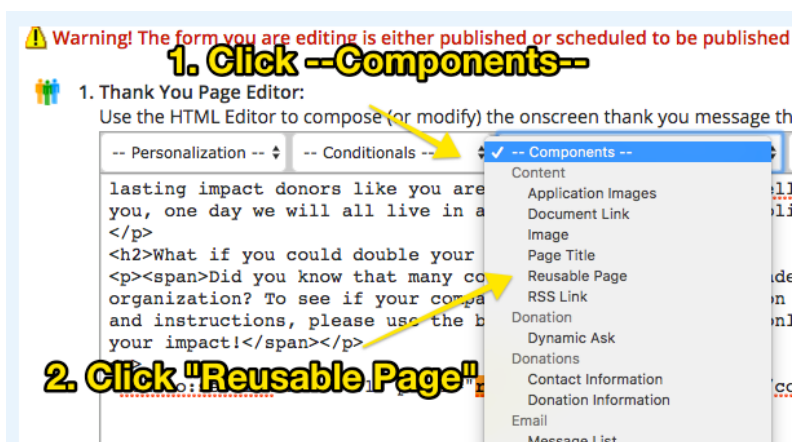
Path: h2

[Finish](#) [Save](#) or [Cancel](#)

In the editor, navigate the cursor to where you want our plugin to appear, and then add the reusable code for our plugin:



Finally, add our submission code right next to this with the same process:



Luminate Online™

Component Library

| Component Types | Components | | | | | | | | | | | | | | | |
|---|---|-------------|---------|-------------|-----------------|------------------------|--|------------------------------------|------------------------|--|----------------------------------|------------------------|--|-------------------------|------------------------|--|
| <ul style="list-style-type: none">Personal EventSolicited Content<ul style="list-style-type: none">Qualified ContributionSpecific ContributionTime-Based ContributionSpecific SolicitationContent<ul style="list-style-type: none">Reusable PageImageDocument LinkApplication ImagesRSS LinkDonationDonationsEmail | <p>Records 1 - 10 of 39 First Previous Next Last</p> <p><input type="text"/> <input type="button" value="Q Search"/> <input type="button" value="Show All"/></p> <p>Page 1 of 4 <input type="text"/> <input type="button" value="To Page ↻"/></p> <table border="1"><thead><tr><th>Name</th><th>Actions</th><th>Description</th></tr></thead><tbody><tr><td>adminnavigation</td><td>Insert</td><td></td></tr><tr><td>reus_360matchpro_confirmation_page</td><td>Insert</td><td></td></tr><tr><td>reus_360matchpro_donation_widget</td><td>Insert</td><td></td></tr><tr><td>reus_360matchpro_plugin</td><td>Insert</td><td></td></tr></tbody></table> | Name | Actions | Description | adminnavigation | Insert | | reus_360matchpro_confirmation_page | Insert | | reus_360matchpro_donation_widget | Insert | | reus_360matchpro_plugin | Insert | |
| Name | Actions | Description | | | | | | | | | | | | | | |
| adminnavigation | Insert | | | | | | | | | | | | | | | |
| reus_360matchpro_confirmation_page | Insert | | | | | | | | | | | | | | | |
| reus_360matchpro_donation_widget | Insert | | | | | | | | | | | | | | | |
| reus_360matchpro_plugin | Insert | | | | | | | | | | | | | | | |

This completes the setup. Please **Test Drive** the form and check that data is properly flowing into the 360MatchPro portal at <https://doublethedonation.com/360matchpro/>.