



Page Builder 101

A comprehensive guide to designing your
Paperless Hosted Transaction Page

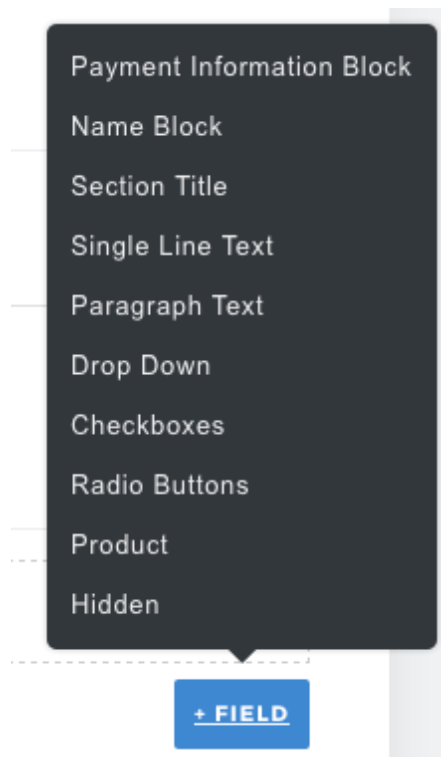
First Steps

1. Go to <https://pages.paperlesstrans.com/register> and Register for, and/or login to the Page Builder.
2. Click “Add Page” on the left-hand side or in the middle of the page.
3. Gather all of the necessary materials you will need to build the page. These include, but are not limited to:
 1. Logo
 2. Background image
 3. Graphic/video link
 4. Page text
4. Follow all of the steps in the Page Builder to complete the setup of your page.

How do I add Form Fields?

Simply click on the +Field blue button as seen below and select the type of Form field that you'd like to add.

Here's a guide to the Form field types and associated descriptions:



How do I add Form Fields?

Payment Information Block (required for All Pages-per below): This Form field refers to capturing either Credit/Debit Card Information or ACH/Check Information from the donor/payer. These are SSL encrypted and secure fields provided to allow the donor/payer to enter in their Payment details.

Name Block (required for All Pages-per below): This is the block of Form field information where we capture Donor/Payer Name, Address, City, State, Zip and Email Address.

Form

Payment Information block (the block of information that captures the CC/ACH payment information) and Name Block (This is the block of information where we capture Name, Address, City, State, Zip and Email) are required on all forms and will be placed at the top of the form by default unless otherwise specified.

How do I add Form Fields?

Section Title: This can be used (as an optional) as a Header or Title for a Section of Form fields where you're capturing custom field information. See example below (the Section Title is in the Blue block of text).

**Help us Celebrate Ten Years of
Ministry!**

Your partnership will help us cover our ministry's operational costs through May of 2017.

Donation Amount *

- ☐ \$10 Per Month Partner
- ☐ \$25 Per Month Partner
- ☐ \$50 Per Month Partner
- ☐ \$75 Per Month Partner
- ☐ Other...

How do I add Form Fields?

Single Line Text: This form field refers to any single line of (short answer) text (i.e. Phone Number or other questions asked that have short text answers). See example below.

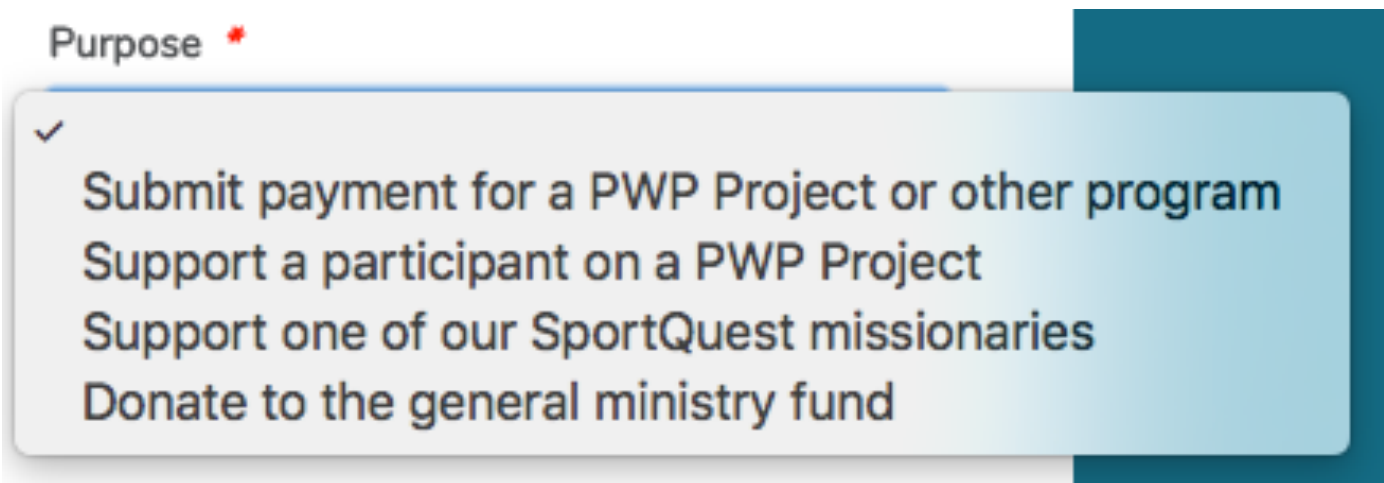
Phone Number *

Paragraph Text: This form field refers to paragraph text (for longer answers). See example below for a Memo line where the donor/payer can type in a paragraph's worth of text and expand that box to see their answer.

Memo *

How do I add Form Fields?

Drop Down: This form field refers to having more than one selectable answer for the donor/payer to select. Under the 'Choices' tab, you will have the option to label each selectable response and even designate a separate Value name depending on what you want each selectable response to show up as in the Paperless Virtual Terminal reporting. See example below.



The image shows a screenshot of a web form. At the top, there is a label 'Purpose' followed by a red asterisk, indicating a required field. Below the label is a dropdown menu with a checkmark icon on the left. The dropdown menu is open, displaying four options: 'Submit payment for a PWP Project or other program', 'Support a participant on a PWP Project', 'Support one of our SportQuest missionaries', and 'Donate to the general ministry fund'. The background of the dropdown menu is light blue, and the text is in a dark blue font.

Purpose *

✓

- Submit payment for a PWP Project or other program
- Support a participant on a PWP Project
- Support one of our SportQuest missionaries
- Donate to the general ministry fund

How do I add Form Fields?

Checkboxes: This form field refers to having one selectable answer (or it can be added into multiple checkboxes) for a donor/payer to select or leave unchecked. Under the 'Choices' tab, you will have the option to label each selectable response and even designate a separate Value name depending on what you want each selectable response to show up as in the Paperless Virtual Terminal reporting. See example below.

☐ Add me to the Thrive private email list

How do I add Form Fields?

Radio Buttons: This form field refers to having more than one selectable answer for the donor/payer to select. Under the 'Choices' tab, you will have the option to label each selectable response and even designate a separate Value name depending on what you want each selectable response to show up as in the Paperless Virtual Terminal reporting. See example below.

Do you have an item to donate to the silent auction? (If yes, a Rescue Humanity Team member will contact you shortly) *

- ☐ Yes
- ☐ No

How do I add Form Fields?

Product: This refers to a series of form fields that are essentially Single Line Text boxes and typically these are used for Split Gift Contribution Pages, Event Registration Pages (where there are various Registration levels/price points), or Storefront Pages (to list the various Store items/price points). Under the 'Advanced' tab, this is how you would like the field to show up for reporting purposes. By default, the name attribute is generated based on label. See example to the right.

DONATION AMOUNT	
Designations *	
<u>Tithe</u>	Amount <input type="text"/>
<u>Offering</u>	Amount <input type="text"/>
<u>Missions</u>	Amount <input type="text"/>
<u>SEEDS Vision Monthly</u>	
	Amount <input type="text"/>
<u>United Offering</u>	Amount <input type="text"/>
<u>Youth Camp</u>	Amount <input type="text"/>
<u>Kids Camp</u>	Amount <input type="text"/>
<u>XO Marriage Conference</u>	Amount <input type="text"/>
<u>Other (Please specify below)</u>	Amount <input type="text"/>
Other	<input type="text"/>

How do I add Form Fields?

Hidden: This form field refers to any "hidden" form field preset that you want automatically pre-populated (but still hidden to the donor/payer on the Page itself). For example, some organizations want to have all Page donations for a certain campaign to be coded with a Campaign/Project Code. This is a good example of how the Hidden form field would be utilized.

How do I know the order of the form fields?

You can simply drag each Form field block in the Page Builder to prioritize the order of each of the Fields.

How do I know when the Page is live and ready to accept transactions?

You will receive an email from designteam@paperlesstrans.com with a link to your page once it is live.

When do I contact the Design Team?

- If you have any issues with the Page Builder like:
 - Unable to upload an image
 - Needing to upload multiple images
 - Using a non-standard font
- If you do not want to use the Page Builder at all, feel free to contact the Design Team (designteam@paperlesstrans.com) and they will be happy to design the page for you.
- If you are making a change or updating an existing page, please email your request to changes@paperlesstrans.com.

What do I include in an email to designteam@paperlesstrans.com?

- Your name
- The name of your organization
- If you would like the Design Team to mimic the look of your website, please provide a link to that site.
- If you would like a custom design that does not mimic your website send the design elements (logo, background, other images, colors, and fonts) to designteam@paperlesstrans.com.
- If you already have another page(s) with us that you would like us to mirror, send that link to designteam@paperlesstrans.com

Image Do's and Don't's

(these apply to both the Page Builder and pages made by the Design Team)

- All images sent should be sized properly
 - Banners should be between 800px and 1200px wide
 - Images for the left side of the page should be no wider than 500px
 - If you send an image that is too small, it will become pixelated when blown up
- All images should be named in this way
 - With no spaces (IE: image2.jpg NOT image 2.jpg)
 - All letters used in image names (including suffixes) should be lower-case (IE: image.jpg NOT image.JPG and NOT IMAGE.JPG)

Next Steps

Once you publish your page in the Page Builder, it will go to our team for final approval and activation. The secure link will then be emailed to you and a test donation will be made.

If you are happy with the design of the page, embed it in your site and begin processing transactions.

If you are not happy with the design of your page or you have changed your mind about the design, please email changes@paperlesstrans.com