

# CampusPay Form Settings FAQ

To get started, first create a new form. These settings can be found on Step 1.

## General Settings

- Form Name: name of the form so your families know what they are paying for
- Form Type:
  - Payment Form or Non-Payment Form
  - This cannot be changed once an option is selected. If copying a form, the copy will be the same form type
- Description: Internal notes can be placed here, families do not see this
- Form Web Address: this can be similar to the form name (i.e., donations2025)
- Department: select the department that relates to your form
- Publish Date and Expire Date: set the form to automatically publish (go live) and or automatically unpublish at a certain time and date

### General Settings

**Form Name \***

  
**Form Type \***

Payment Form     Non-Payment Form

ⓘ Please note: once you save the form, you cannot change the form type.

**Description**

This is an internal note


**Form Web Address \***

https://forms.diamondmindinc.com/watermelonschool/

**Department \***

Online Giving ▼

**Publish Date**



Hours


▼

:

Minutes

▼

**Expire Date**



Hours

▼

:

Minutes

▼

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## Giving Thermometer

- Goal Target Amount: set your target goal you'd like to reach
- Check the boxes you want to display to your users:
  - Display progress toward goal to payers? – This will allow your users to see the progress of the goal in real time on the form
  - Display count of donors? – Allow your users to see how many people have given to the cause you are hosting
  - Enable visitors to share via email? – This gives your users the ability to share out the form link to others to help spread the word. You can enter a custom email body to get your users started
- Notify school admins of progress?: enter goal percentages and an email to notify school admins of goal milestones (emails do not have to be users).

### Giving Thermometer

**i** You can track donation progress with "Giving thermometer" and get notified via email automatically.

#### Goal Target Amount





\$ 25,000.00

- Display progress toward goal to payers?
- Display count of donors?
- Enable visitors to share via email?

Please consider donating to my child's school, every penny counts!  
[[form\_web\_address]]

Please note: [[form\_web\_address]] will be replaced by actual Web Address.

#### Notify school admins of progress?

- |    |                                  |                   |  |          |   |
|----|----------------------------------|-------------------|--|----------|---|
| At | <input type="text" value="25"/>  | % of goal, notify | <input type="text" value="principal@school.com"/>      | <b>i</b> |  |
| At | <input type="text" value="50"/>  | % of goal, notify | <input type="text" value="admin@school.com"/>          | <b>i</b> |  |
| At | <input type="text" value="75"/>  | % of goal, notify | <input type="text" value="businessoffice@school.com"/> | <b>i</b> |  |
| At | <input type="text" value="100"/> | % of goal, notify | <input type="text" value="allstaff@school.com"/>       | <b>i</b> |  |

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## Payment Settings

- Payment Gateway: pick the payment gateway you would like the funds to flow through
- Payment Types: select the payment types you would like to offer to your families

### Payment Settings

#### Payment Gateway

#### Payment Types

- Visa    Mastercard    Amex    Discover   |    ACH

- Cost Neutral Checkbox: enable this to allow your families the option to cover a set percentage of processing
  - Label: this will be displayed to your parents when the checkbox is offered during the payment process
  - Percentage: set any percentage you desire
  - Please note that families cannot be required to select this option

#### Cost Neutral Checkbox

**i** Gives form users the option to add a percentage to the total payment to help offset processing costs.

##### Label

##### Percentage

 %

**i** Please note: [X] will be replaced by actual percentage.

- Apply a Tax: enable this to apply a tax to payments
  - A tax rate needs to be applied to each individual state

#### Apply a Tax

**i** Remember to require a billing state field on your form so tax is calculated properly.

##### State

##### Tax Rate

 %

## CampusPay Form Settings FAQ

- Recurring payments: enable recurring payments for your families to create payment plan

Recurring payments

Don't Offer One Time Payment (This will only show "Schedule Recurring Payment" option for payers)

Frequency: \*

Weekly	<input checked="" type="checkbox"/>	Biweekly Once in 2 Weeks	<input checked="" type="checkbox"/>
Monthly	<input checked="" type="checkbox"/>	Yearly	<input checked="" type="checkbox"/>

Start first payment: \*

Submission date +  days

On a future date on or after  [before 12 months of submission date]

Maximum limit recurrence options: \*

No Limit

Max  Times [max limit is 99 including original payment]

End By

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## Select a Theme For Your Form

- Standard Theme: this is a customizable theme that can be created in the “Themes” tab

### Select a Theme For Your Form

#### Standard Theme

 Easily personalize forms with new Standard Themes. Customize your logo, background, and button colors to match your branding.

