

LUMINATE CONFIGURATION PROCESS

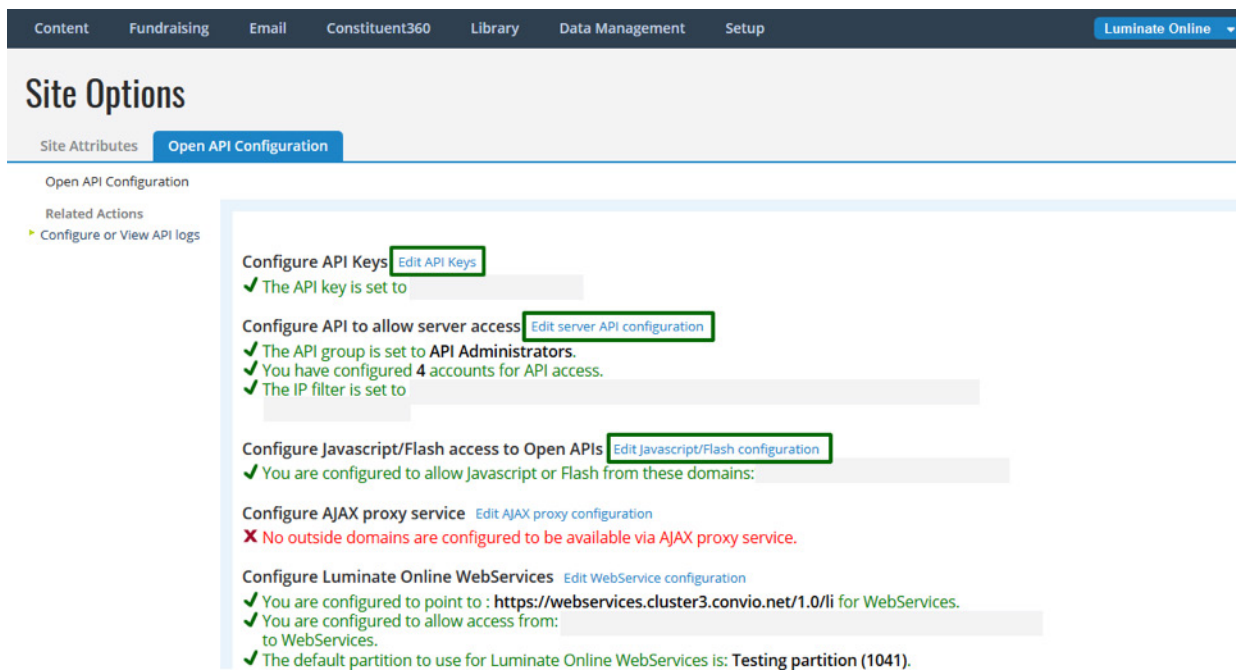
Overview

FlexFormz has the ability to add the donors and donation details to your existing Luminate Online account, to be able to take advantage of the CRM features.

There are a few Luminate Online settings which need to be adjusted in a specific way, to allow the integration with the FlexFormz platform. In this section we'll describe each one.

API Setup

The first step needed is to configure the API access. After you log into your Luminate Online (LO) account, go to **Setup » Site options**, then click on the **Open API Configuration** tab (Figure 1).



The screenshot shows the 'Open API Configuration' page in the Luminate Online interface. The page has a dark navigation bar at the top with links for Content, Fundraising, Email, Constituent360, Library, Data Management, and Setup. A 'Luminate Online' dropdown menu is on the right. Below the navigation bar is the 'Site Options' section, with 'Open API Configuration' selected. On the left, there are links for 'Open API Configuration', 'Related Actions', and 'Configure or View API logs'. The main content area lists five configuration items:

- Configure API Keys** (Link: [Edit API Keys](#)) - Status: ✓ The API key is set to [redacted]
- Configure API to allow server access** (Link: [Edit server API configuration](#)) - Status: ✓ The API group is set to API Administrators. ✓ You have configured 4 accounts for API access. ✓ The IP filter is set to [redacted]
- Configure Javascript/Flash access to Open APIs** (Link: [Edit Javascript/Flash configuration](#)) - Status: ✓ You are configured to allow Javascript or Flash from these domains: [redacted]
- Configure AJAX proxy service** (Link: [Edit AJAX proxy configuration](#)) - Status: ✗ No outside domains are configured to be available via AJAX proxy service.
- Configure Luminate Online WebServices** (Link: [Edit Webservice configuration](#)) - Status: ✓ You are configured to point to : <https://webservices.cluster3.convio.net/1.0/li> for WebServices. ✓ You are configured to allow access from: [redacted] to WebServices. ✓ The default partition to use for Luminate Online WebServices is: Testing partition (1041).

Figure 1: Open API Configuration. The options that need to be adjusted are highlighted.

If you do not see this section, you must contact the LO support team, to ensure this feature is enabled for your account and accessible for your current user.

Return to the **Open API Configuration** module, click on **Edit Javascript/Flash configuration**. (Figure 3). There, you must add the following domain: *.flexformz.com using the field labeled **“Allow JavaScript/Flash API from these domains:”**.

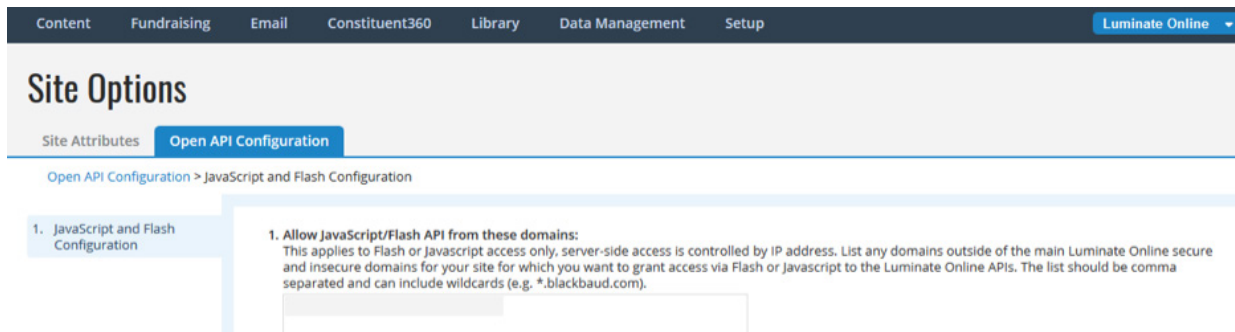


Figure 3: JavaScript and Flash Configuration

In short, you must add the FlexFormz domain and IP address to grant access to your LO account. You also must store the following values for further configuration on your FlexFormz account:

- API key
- User name and password of the API account just created.

API Group Setup

API accounts like the one created in the previous section belong to “API administrators” group. To edit the permissions, navigate to **Constituent360, Groups** item, in the main menu, then select the **Administrator Group List** tab. Look for the **API Administrators** item and click on **Edit permissions** (Figure 4).

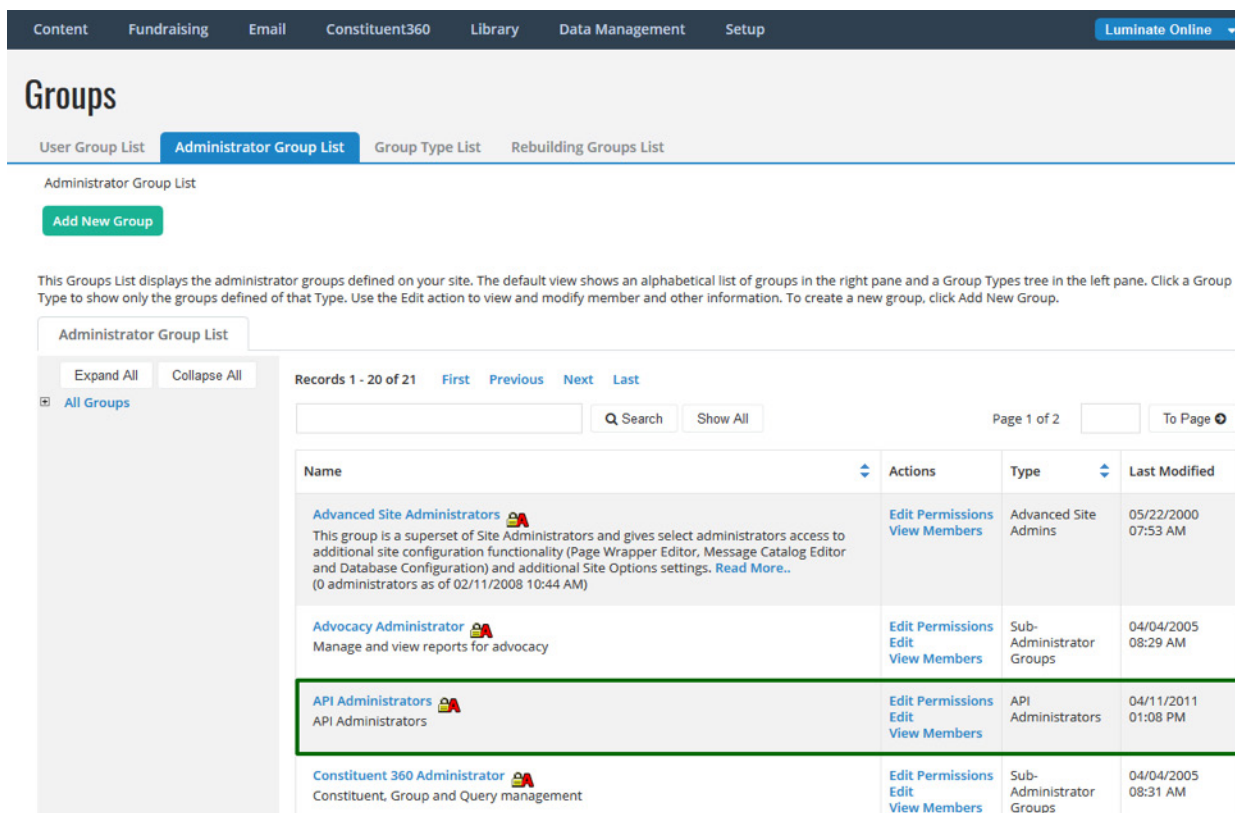
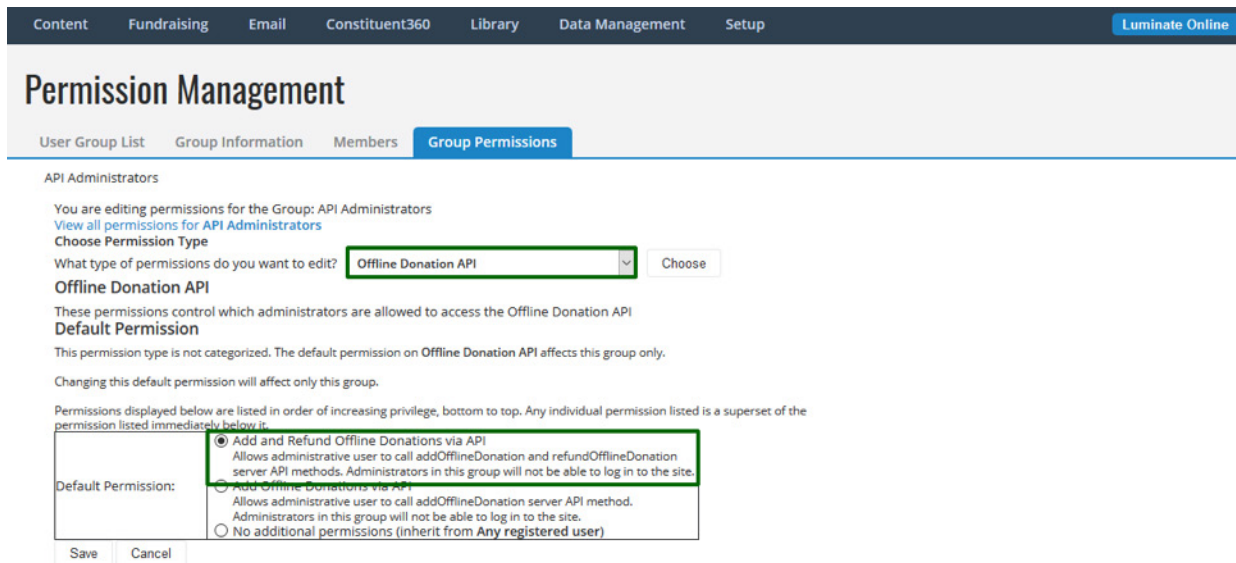


Figure 4: Administrator Group List

In the permissions dropdown, select **Offline Donation API** and check the “**Add and Refund Offline Donations via API**” permission level (Figure 5).



Content Fundraising Email Constituent360 Library Data Management Setup Luminate Online

Permission Management

User Group List Group Information Members **Group Permissions**

API Administrators

You are editing permissions for the Group: API Administrators
 View all permissions for API Administrators

Choose Permission Type

What type of permissions do you want to edit? **Offline Donation API** Choose

Offline Donation API

These permissions control which administrators are allowed to access the Offline Donation API

Default Permission

This permission type is not categorized. The default permission on Offline Donation API affects this group only.

Changing this default permission will affect only this group.

Permissions displayed below are listed in order of increasing privilege, bottom to top. Any individual permission listed is a superset of the permission listed immediately below it.

Default Permission:

- Add and Refund Offline Donations via API**
 Allows administrative user to call addOfflineDonation and refundOfflineDonation server API methods. Administrators in this group will not be able to log in to the site.
- Add Offline Donations via API**
 Allows administrative user to call addOfflineDonation server API method. Administrators in this group will not be able to log in to the site.
- No additional permissions (inherit from Any registered user)**

Save Cancel

Figure 5: Offline Donation API permissions

Donation Form Setup

Luminate Online requires that external donation records be linked to an existing donation form. In this section, we’ll describe the setup requirements to allow FlexFormz access.

First, you must create a campaign and a donation form in the **Donation Management** module. This process is described on the following Luminate Online reference (https://www.blackbaud.com/support/howto/coveo/luminate-online/Subsystems/donation_management/Content/Concepts/Admin_Online_Giving_Management_DonationForms_Create.html).

We recommend creating a campaign and donation form for FlexFormz exclusive use, since it requires specific settings. An exclusive form will also track donations registered from the external forms easily (Figure 6).

Content Fundraising Email Constituent360 Library Data Management Setup **Luminate Online**

Donation Management

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

Campaigns > Example Campaign

Create a Donation Form Adjust Thermometer

This is a list of all the donation forms that have been configured for your campaign. Use the Edit action beside each form to do any of the actions that were available when creating the form, such as adding or editing giving levels, editing the donor screens, adding premiums, configuring autoresponders, and testing the form. Use the Publish action to make your form active immediately - overriding any schedule that has been set. To make a new form, use the Create a Donation Form button or Copy an existing form.

- Donation Form List -

All My Categories Go

Records 1 - 1 of 1 First Previous Next Last

Search Show All Page 1 of 1 To Page

Name	Actions	Status	User Category	Publish Schedule	Unpublish Schedule	Summary
Donate Now (Example) Form ID: 1600 online/offline	Preview Edit Copy Unpublish	Published	General	08/10/2018 1:51 PM	No schedule set	Created:08/02/2016 10:19 AM by convio

Records 1 - 1 of 1 First Previous Next Last

Show archived donation forms
 Displays the archived donation forms in the list above

Figure 6: Donation forms list

Once you have the donation form created, with the standard setup, edit it to change the parameters described below.

1. In **Identify Donation Form** tab, set the Interaction mode field to **online/offline** (Figure 7).
2. In **Configure Donation Levels** tab, ensure that a **Donor Entered Amount** level is added and published (Figure 8).
3. In **Design Donor Screens** tab, Donation Form subtab, add the following Honor Gift components and set them as optional (uncheck the Required field) (Figure 9):
 - Honor Gift – Show Honor Fields
 - Honor Gift - Type
 - Honor Gift – Honoree Full Name
 - Honor Gift – Message Body
4. For each Billing component, uncheck the “**This is a required**” option (Figure 10).
5. In the **Payment Type** component, check the fields:
 - Allow administrators to record cash donations.
 - Allow administrators to record donations received via check (Figure 11).
6. Publish the form, ensuring that there’s not a scheduled unpublish date set (Figure 12).
7. Finally, retrieve the form ID to include it in the FlexFormz configuration. You can locate the ID in the donation forms list (Figure 6).

Content Fundraising Email Constituent360 Library Data Management Setup **Luminate Online**

Donation Management

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

Campaigns > Example Campaign > Donate Now (Example)

- Identify Donation Form
- Configure Donation Levels
- Design Donor Screens
- Validate
- Configure Autoresponders
- Configure Cross References
- Test Drive
- Publish

*** 1. Form Name:**
Identifies the purpose of this form to other administrators viewing donation form lists

2. Public Name:
Identifies the form to donors in their web browser

3. Description:
Adds details about the purpose of this donation form

*** 4. Security Category:**
Controls which administrators can manage this donation form and who can display and use it

5. Form Designee:
Assigns the funds collected with this donation form to a specific entity, such as a person or organization (Note: If you choose a designee here, you cannot add the Designated Giving element to the form.)

6. Interaction Mode:
Determines if the form will be available online, offline, or both

7. Form Layout:

Figure 7: Donation form general information

Content Fundraising Email Constituent360 Library Data Management Setup **Luminate Online**

Donation Management

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

Campaigns > FlexFormz campaign (Do not edit) > FlexFormz donation form (Do not edit)

- Identify Donation Form
- Configure Donation Levels
- Design Donor Screens
- Validate
- Configure Autoresponders
- Configure Cross References
- Test Drive
- Publish

Create a Donation Level

This is a list of donation levels that are currently available for your form. Use the Edit action to modify such things as the name or amount for a level or to add premiums. Use the Create a Donation Level link to add an entirely new level. If you make any changes to the order of the levels, you should press Save or Next to save those changes. Be sure to publish all levels you want to use with this form.

Order	Level Name	Amount	Actions	Status	Security Category	Summary
1	Bronze Level ID: 2311	\$35.00	Edit Publish	Unpublished	General	Promo Code: None Recurring: None Benefits: None Created: 09/12/2018 11:47 AM by test@digizent.com
2	Silver Level ID: 2310	\$60.00	Edit Publish	Unpublished	General	Promo Code: None Recurring: None Benefits: None Created: 09/12/2018 11:47 AM by test@digizent.com
3	Gold Level ID: 2312	\$120.00	Edit Unpublish	Published	General	Promo Code: None Recurring: None Benefits: None Created: 09/12/2018 11:47 AM by test@digizent.com
4	Donor Entered Amount Level ID: 2309	User Entered (\$5.00 Minimum)	Edit Unpublish	Published	General	Promo Code: None Recurring: None Benefits: None Created: 09/12/2018 11:47 AM by test@digizent.com

Next Save or Cancel

Figure 8: Donation levels

Content Fundraising Email Constituent360 Library Data Management Setup **Luminate Online**

Donation Management

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

Campaigns > Example Campaign > Donate Now (Example) > Donation Form

- Identify Donation Form
- Configure Donation Levels
- Design Donor Screens
 - Donation Form
- Validate
- Configure Autoresponders
- Configure Cross References
- Test Drive
- Publish

The Form Designer shows the data elements that are already on your form in the window at the right; additional data elements that you can add are shown in the window at the left. Select a data element to Add, Remove, or Reorder it. Use the lower portion of the page to Edit and Preview a selected element after saving it. Use the Preview button to preview the entire form.

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

Add > < Remove

Arrange the order of the selected data elements:

- Page #1
- HTML Caption
- Flexible Sustainer Donation Level
- Honor Gift - Show Honor Fields
- Honor Gift - Type
- Honor Gift - Honoree Full Name
- Honor Gift - Message Body
- Custom Headers
- Buttons

New Edit Save Order and Edit Selected

Previous Data Element **Honor Gift - Show Honor Fields** Next Data Element

Edit Data Element Preview Data Element

[Help me with this Data Element](#)

Figure 9: Honor fields

Content Fundraising Email Constituent360 Library Data Management Setup **Luminate Online**

Donation Management

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

Campaigns > Example Campaign > Donate Now (Example) > Donation Form

- Identify Donation Form
- Configure Donation Levels
- Design Donor Screens
 - Donation Form
- Validate
- Configure Autoresponders
- Configure Cross References
- Test Drive
- Publish

The Form Designer shows the data elements that are already on your form in the window at the right; additional data elements that you can add are shown in the window at the left. Select a data element to Add, Remove, or Reorder it. Use the lower portion of the page to Edit and Preview a selected element after saving it. Use the Preview button to preview the entire form.

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
- Flexible Sustainer Donation Level

Buttons: Add > < Remove

Arrange the order of the selected data elements:

- Billing Title
- Billing First Name
- Billing Middle Name
- Billing Last Name
- Billing Suffix
- Billing Street 1
- Billing Street 2
- Billing City
- Billing State/Province

Buttons: Save Order and Edit Selected

Previous Data Element **Billing Title** Next Data Element

Edit Data Element Preview Data Element

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.

* Field Label:
Enter the label to identify this field to the user.
Title:

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.

* Transaction Summary Field Label:
Enter the label to identify this field to the user.
Title:

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.

Previous Data Element Next Data Element

Buttons: Finish Save or Preview or Cancel

Figure 10: Billing fields

Content Fundraising Email Constituent360 Library Data Management Setup **Luminate Online**

Donation Management

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

Campaigns > Example Campaign > Donate Now (Example) > Donation Form

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

The Form Designer shows the data elements that are already on your form in the window at the right; additional data elements that you can add are shown in the window at the left. Select a data element to Add, Remove, or Reorder it. Use the lower portion of the page to Edit and Preview a selected element after saving it. Use the Preview button to preview the entire form.

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

Arrange the order of the selected data elements:

- Billing State/Province
- Billing ZIP/Postal Code
- Billing Country
- Email Address
- Donor Phone
- Communication Opt-in
- Remember Me
- Section Header
- Payment Type

Add > **< Remove**

New **Edit** **Save Order and Edit Selected**

Payment Type

Previous Data Element Next Data Element

Edit Data Element Preview Data Element

1. Credit Cards:
Offers credit cards as a payment type (and displays additional credit card payment fields to configure)
 Yes, allow donors to pay with a credit card

2. Bank Account Withdrawal:
 Yes, allow donors to pay with a bank account withdrawal

3. Allow payment with PayPal:
 Yes, allow donors to pay with PayPal

4. Allow payment with Amazon Payments:
 Yes, allow donors to pay with Amazon Payments

5. Cash Payment:
If you want to be able to record cash transactions, choose this option.
 Yes, allow administrators to record cash donations.

6. Check Payment:
If you want to be able to record check transactions, choose this option.
 Yes, allow administrators to record donations received via check.

Check Number:

Previous Data Element Next Data Element

Finish Save or Preview or Cancel

Figure 11: Payment options

Content Fundraising Email Constituent360 Library Data Management Setup **Luminate Online**

Donation Management

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

Campaigns > Example Campaign > Donate Now (Example)

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

1. This donation form was published according to the schedule below:
2. This donation form was unpublished according to the schedule below:
3. Set New Schedules
Enables you to change the timeframe when this donation form is available
Reschedule
4. Unpublished URL:
Defines the site page to display if someone clicks a link to this donation form when it is not available
 Select
5. URL of the First Donation Form Page:
Makes the address to the first page of the donation process using this form available for copying to emails or other site pages
 /Donation2?df_id=1600&mfc_pref=T&1600.donation=form1
Finish or

Figure 12: Publish options

FlexFormz Connection Setup

1. On FlexFormz Dashboard go to Settings and scroll down until you see the CRM Integrations panel on the lower right side.
2. Click on Connect Luminate CRM. There you'll be prompted with the fields collected in the previous steps:
 - a. API key
 - b. Username
 - c. Password
 - d. Form ID
 - e. Luminate URL
3. Provide those fields and Save. The integration will work immediately.

Contact the FlexFormz support team if you need to review that this integration is working as expected.