

Donation Parts (REVIEW WITH LEAH)

06/09/2025 11:59 am CDT

Overview

Have a donation campaign you would like to share with your customers? You can set this up at the brand level.

Creating Donation Parts

1. Go to **Dashboard > Tools > Configuration > Add** – create the donation part
2. If the part is **Active** it will auto-add to any proposal. You can always uncheck the active box when the promotional campaign is over.
3. If **Is Option Selected** it will be checked on by default and the customer will have to uncheck it if they don't want to donate.

The screenshot shows a form for creating a new donation part. The fields and their values are:

- Name***: Malaria No More
- Description***: We are dedicated to protecting families from mosquitoes, both locally and globally. When you choose Mosquito Squad, we donate a portion of sales to help fund Malaria No More's life-saving programs in Africa. Unfortunately, every two minutes a child dies from malaria, which is transmitted by mosquitoes. We ask you to join Mosquito Squad in the global fight to end needless and preventable deaths from malaria and donate with us by adding a \$1 non-refundable donation to your total. Help us make Malaria No More!
- More Info URL***: <http://www.malariamore.org>
- Unit Price***: 1
- Locale***: United States
- Option Name***: Contribute \$1 to Malaria No More
- Is Option Selected**: ☒ (Annotated with a red arrow and text: "Is Option Selected" = customer facing check on in proposal)
- Taxable**: ☐
- Allow Editing**: ☐
- Active**: ☐ (Annotated with a red arrow and text: check Active when ready to go live, and uncheck when the donation campaign is over)

At the bottom right are **Save** and **Cancel** buttons.

There is also a brand level report, **Donation Parts**, to show you what donation parts used in a date range. The Donation Parts report presents a table of donation parts purchased within the selected date range.


At the top, there are date fields for setting the range, a Refresh button for regenerating the report with the updated dates, and a Download button for getting a CSV formatted version of the report. For each part listed, there are links to the Contact and Invoice that they are tied to. The parts are grouped by type and beneath each group is a summary line.

Donation Parts Brand Report

The **Donation Parts** report presents a table of donation parts purchased within the selected date range.

At the top, there are date fields for setting the range, a Refresh button for regenerating the report with the updated dates, and a Download button for getting a CSV formatted version of the report. For each part listed, there are links to the Contact and Invoice that they are tied to. The parts are grouped by type and beneath each group is a

summary line.

Donation Parts Report				After: 01/04/2017	Before: 1/31/2019	Refresh	
Date	Contact	Invoice Number	Part	Quantity	Subtotal		
2/23/2018	Dawn Jones	I2560	Malaria No More	1	\$1.00		
3/6/2018	Tim Ryan	I2561	Malaria No More	1	\$1.00		
3/6/2018	Lindsay Adcock	I2562	Malaria No More	1	\$1.00		
3/13/2018	Alix	I2563	Malaria No More	1	\$1.00		
4/13/2018	Paul Zuefeldt	I2566	Malaria No More	1	\$1.00		
4/20/2018	Jason Sponzilli	I2568	Malaria No More	1	\$1.00		
			Malaria No More	6	\$6.00		