# Creating Donation Forms in Microsoft Word

Creating donation forms is something that nearly all nonprofit organizations have to do at some point. While some are able to use more complex editorial software like Adobe InDesign, many have to create these forms using programs like Microsoft Word.

In our **Annual Appeal Campaign Toolkits** we provide letter templates that include a form like the one shown below.

☐ **YES!** I/we wish to support [**Cause/Issue**] with a gift to [**Organization Name Here**].

I have enclosed my contribution of:

☐ $25 ☐ $50 ☐ $75 ☐ $ _____

Name _____

Company Name _____

Address _____

City, State Zip _____

Email _____

Phone_____

Payment Options

☐ **Check** enclosed.
(Please make checks payable to Organization Name Here)

☐ Please **charge** $_____ to my:

☐ Visa ☐ MasterCard ☐ Amex ☐ Discover

Name on Card: _____

Card #: _____ Exp. Date: _____

Signature: _____ CID: _____

For your convenience, your tax-deductible gift may be made through our secure website at [**www.organizationwebsite.org**]. Thank you!

To begin creating your own form, start off with a new document. You will need to decide if you would like to include your form at the bottom of a letter, or as a separate card/envelope.
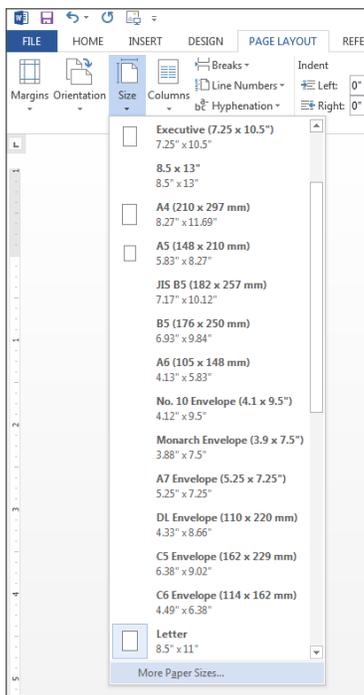
Go to File>New

Once you have a new document **Go to Page Layout > Size** and select either one of the preset sizes or you can customize the size of your document by selecting More Paper Sizes as shown in the image to the left.

NOTE: We are using Microsoft Word 2013 on a PC

Next you can either insert an image to put the logo at the top, or begin typing a title/message. **(Our sample will have a logo at the top with content below).**

To insert an image **Go to Insert > Pictures > Select the Image you would like to include.**

Begin typing out your message. If you would like to include **check boxes,** the best way to do this is to use Wingdings font and type an "o".

An important tool when creating these forms are **tabs.**

Tabs are what you will use to create spaces between certain pieces of text. For example the potential donation amounts or types of credit cards, as can be seen in the top image.

Although you may think this space is created using the "tab" key on your keyboard, it is actually created using a different tool directly in Microsoft Word.

In the top left corner of your screen you will see a small gray box that may look like any of these options:
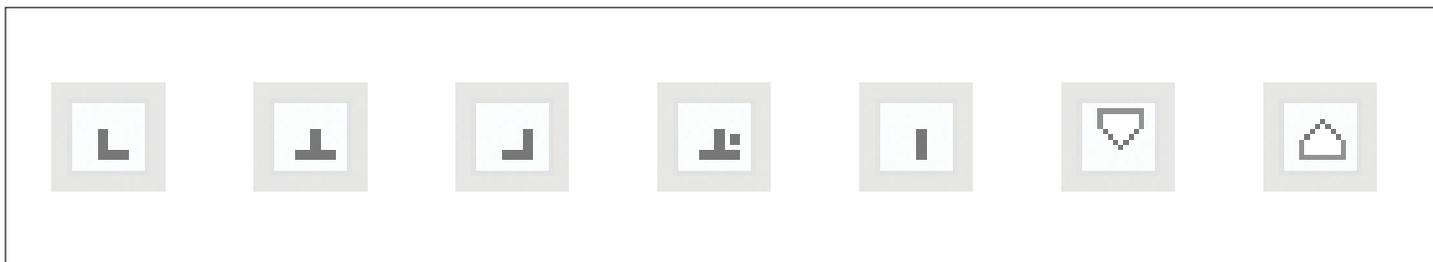

You want to start off with the one that looks like this:

This is the left align tab and is the best option when spacing out type.

Start by clicking on the ruler on the top of your page to place a tab on the page. There should be a tab before each check box and each dollar amount. This way you will be able to control the amount of space between each check box section and you can also control the space between the dollar amount and the check box it goes with. Your ruler should look like this:
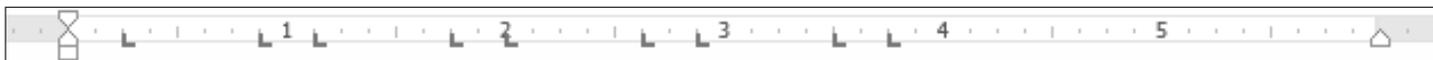
If you are realizing that you have tabs all over your ruler, but none of your type is moving, this is where you get to use the tab key on your keyboard. When you hit "tab" it will move the type to the next tab you have placed on your ruler.

Once you have spaced out your check boxes and you are happy with how they look, you should have something that looks like this:

When creating your sections, if you know you would like an "other" check box, you may want a line that goes after the word other where donors can write the dollar amount that they would like to donate.

It is common for people to create this line using the underscore key or the underline function in Word, but this is not the most efficient way to create a line. You can create lines for your form using...you guessed it...tabs!

This time you will use the tab that looks like this:

This is the right align tab. You will place this where you would like the line to end. Then double click on the tab that you just dragged onto your ruler.

A window like this will pop up:
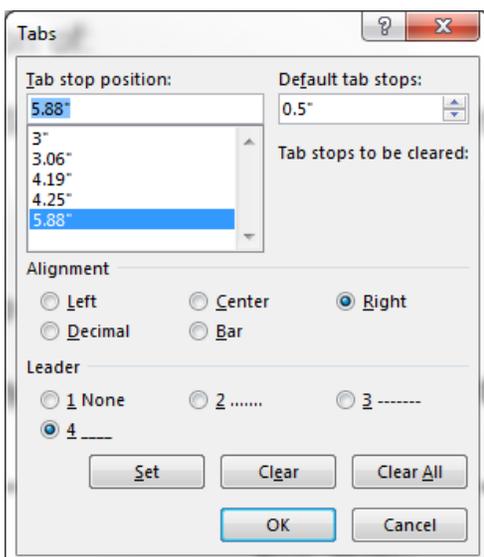
Next, you want to scroll to the bottom of the section labeled "Tab Stop Position" and select the last one in the list. *Select the last one only if your tab with the line is the last one on that line, otherwise, select wherever you put your right align tab.*

Then click option number 4, the underline, and click OK.

Click the tab key and your form should now have a line that you can easily adjust by moving the tab along the ruler to its desired position.

You can continue to use these tools and steps to create the rest of your form.

Another nice tool that is incredibly useful when creating forms is the **spacing tool.**

The spacing tool allows you to add vertical space between each line in your form providing more room for the person filling out the form to write. You are able to get to this tool by going to **Page Layout > Spacing** as shown below.
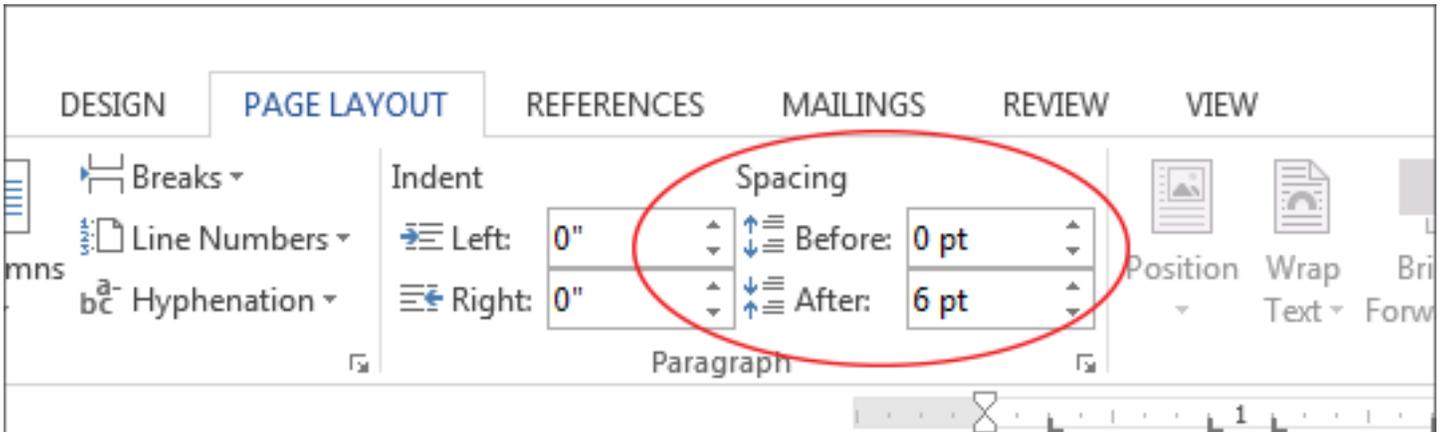
Next, you are able to control the spacing using the "Space After" or "Space Before," tools to adjust the space between each line.

Once you are finished with your form, you should have something that looks like the image below and is ready to be printed and sent out to donors!

NONPROFIT TOOLKIT

☐ **YES!** I/we wish to support [**Cause/Issue**] with a gift to [**Organization Name Here**]. I have enclosed my contribution of:

☐ $25   ☐ $50   ☐ $75   ☐ $100   ☐ Other $ _____

Payment Options

☐ **Check** enclosed.
 (Please make checks payable to *Organization Name Here*)

☐ Please **charge** $ _____ to my: ☐ Visa   ☐ MasterCard   ☐ Amex   ☐ Discover

 Name on Card: _____

 Card #:_____ Exp. Date: _____

 Signature: _____ CID: _____

Name_____ Company _____

Address _____

City _____ State _____ Zip Code _____

Email _____ Phone _____