Donations and Memberships

The website doesn't process payments itself. Donations and memberships are handled on **HighLevel** hosted pages at `crm.fortadams.org`. The website's job is to send supporters to the right page.

Donations

On the website: Support Us → *Donate* shows a **Make your gift** box with a **Continue to secure donation form** button. It also mentions the *Keeper of the Fort* recognition for gifts of $25 per month.

Where the button goes: the HighLevel **Web Donation** form:

```
https://crm.fortadams.org/widget/form/okXo0SaqzMNahWJzB1YZ
```

The donor enters the amount, their details, and payment on that form. The website doesn't pre-fill the amount or frequency.

Where to manage it: in HighLevel, under the form and payments settings: form fields, receipts, thank-you emails, and follow-up workflows.

> **HighLevel setup to confirm.** As of September 2026, these donation settings in HighLevel still need to be configured and tested (this is HighLevel setup, not website code):

- Email is required, and donors are matched to existing contacts by email without overwriting membership status or tags.
- Fund/designation and campaign choices are captured per gift. The form checked on September 23, 2026 didn't show these fields.
- A successful-payment workflow links each transaction to the contact, records its classification, adds tags, and sends a receipt.
- Handling of duplicate transactions, failed payments, refunds, and, if offered, recurring gifts.
- End-to-end test gifts: a new donor, an existing member, repeat gifts to different funds, a failed payment, and a refund. Check the amount and history on the contact record. Opening the form or submitting it once doesn't prove the setup works.

Donor-advised fund (DAF) gifts

Below the donation box, a panel tells donors how to give from a donor-advised fund. It shows the Trust's legal name, EIN (**05-0475756**), and mailing address. If the Trust signs up for a DAF giving widget (for example Chariot/DAFpay), a developer can switch this panel to show the widget instead.

Memberships

On the website: Support Us → *Membership* shows four annual tiers, each with a **Join as …** button:

Tier	Price	Benefits shown on site
Individual	$50 / year	Membership benefits for 1 adult
Family	$75 / year	2 adults and children/grandchildren up to 18
Patron	$500 / year	Standard benefits + 5 guest passes; $450 tax-deductible
Benefactor	$1,000 / year	Standard benefits + 10 guest passes; $950 tax-deductible

The Visit page also advertises that **members tour for free**, with a link to this section.

Where the buttons go: each tier links to its own HighLevel **payment link** (`https://crm.fortadams.org/payment-link/…`) for a **recurring product**. When someone pays:

1. HighLevel creates or updates their **contact**.
2. HighLevel creates an annual **subscription** automatically. Nothing else needs to create one.
3. The subscription renews every year until cancelled. The site says "Renews annually. Cancel anytime."

Where to manage it: HighLevel → **Payments → Subscriptions** for active members, renewals, and cancellations; **Payments → Products** for the recurring products; and **Automation** for onboarding workflows. Set workflows to trigger on the subscription, filtered by product and *Active* status.

> If you change a tier's price or benefits in HighLevel, the website **won't** update automatically. Tier names, prices, benefits, and checkout links are written into the site. Ask the developer to update them at the same time, so the site never advertises a different price from the checkout.

>

> Only the four tiers above have website checkout links. Other levels, such as legacy levels carried over from the previous CRM, must be handled directly in HighLevel. While members are moving from the old CRM, make sure no one is billed by both systems for the same renewal.

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