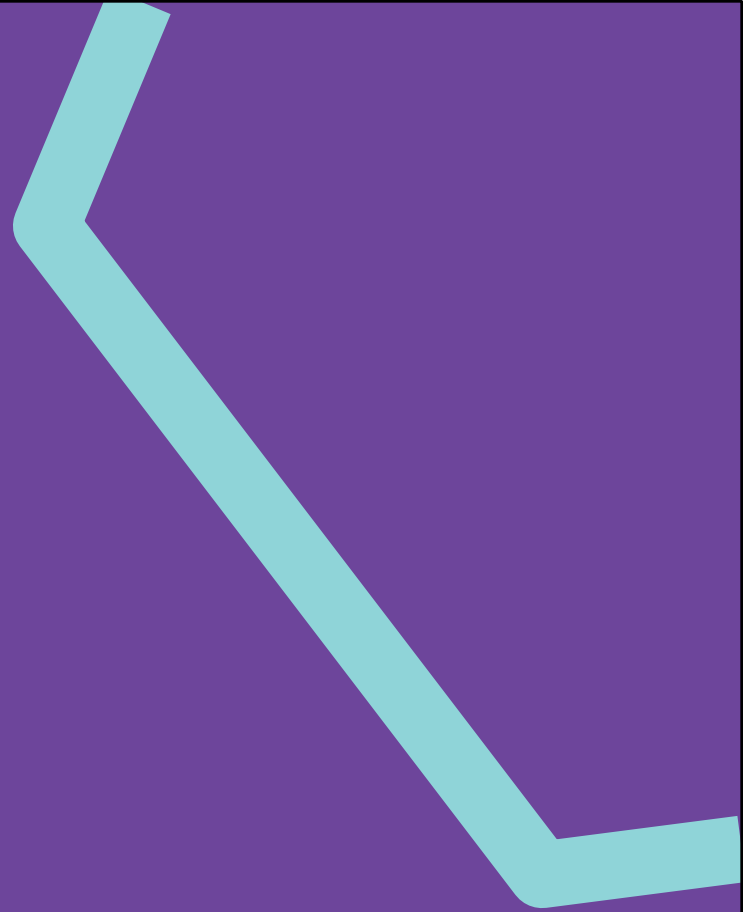


*GiveSmart*<sup>®</sup>

# Welcome Guide

Count on us every step of the way!



# Welcome to GiveSmart!

We're committed to your success. From strategic guidance through how-to questions to campaign execution, our team is here, year-round, to help you achieve your goals!

This welcome guide is intended to walk you through next steps after purchasing your subscription along with an overview of our team and the services we provide. Be sure to complete the Customer Support webinar series for a full tour of the features and benefits of our GiveSmart platform.

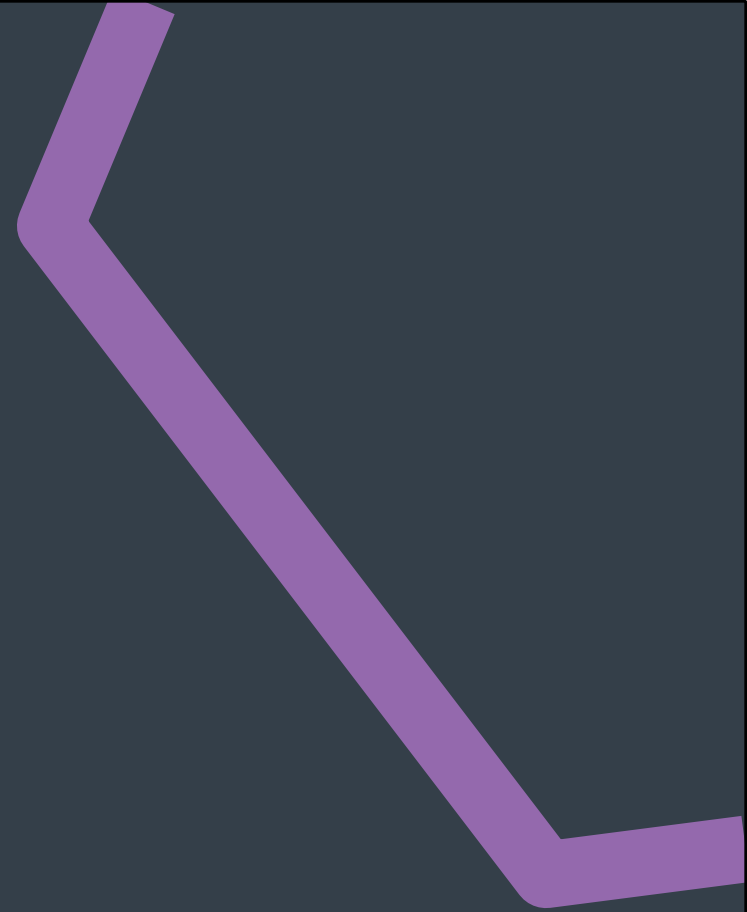
We appreciate the opportunity to be your platform of choice for your fundraising needs. We're here to support you every step of the way!

Your GiveSmart Team

*GiveSmart*<sup>®</sup>

# Quick Start

Next steps in fundraising with GiveSmart



# Platform access

## Admin access

A welcome email is sent to the individual in your organization who is listed as the main contact on your GiveSmart subscription agreement. This email is delivered upon signing of the agreement and merchant application, when applicable. The email contains a link to complete their user account setup. Once the main contact completes their account setup, they'll have access to the platform and opportunity to add additional admin accounts.

## Adding org admins

An org admin has access to all campaigns created by the organization along with top level reporting and settings. The main contact who received the initial account access can follow these steps to add more org level admins.

1. As an org admin, log into e.givesmart.com.
2. Once logged in, you will land in your Org Hub.
3. Click "Admins" from the menu options.
4. Click "+ New Admin" and complete the form. An email will be sent to the new admin with a link to complete their user account setup.

## Adding campaign admins

A campaign admin has access to specific campaigns. Any org admin can follow these steps to add a campaign admin.

1. As an org admin, log into e.givesmart.com
2. Once logged in, you will land in your Org Hub.
3. Click "Campaigns" from the menu options.
4. Select the campaign you would like to add a campaign admin by clicking "Visit Campaign".
5. Once in the campaign, select "Users" from the menu options.
6. Click "+ New User" and complete the form. Be sure to include a mobile phone, email address and select "Campaign Admin" as the user role. An email will be sent to the new admin with a link to complete their user account setup.



### Need help?

If you are the main contact on the agreement and did not receive an email check your spam folder for an email coming from GiveSmart. If you're still unable to locate the email, reach out to support and request the email notification to be resent.

# Credit card processing

## Merchant account application

A merchant account with our card processor, CardConnect, is required to accept credit card payments on your GiveSmart sites. When a credit card payment is successfully processed, the funds are reflected in your merchant account. Transactions are batched nightly each business day and deposited into your organization's bank account, less credit card fees, within 5 business days of the batch date.

The application to setup a merchant account is the last step of your GiveSmart subscription agreement and must be completed by an authorized financial signer of your organization such as the owner, president, CEO, CFO, treasurer, accountant, etc. The application and the information requested are strict government requirements to protect against fraudulent activity.

## Manual or swipe

Credit cards can be processed manually by entering card information in a secured form or by swiping the card when in-person. Swipe equipment is available for purchase. Information can be found in the Help Center.

## Transfer of funds

In order for your bank to accept deposits from purchases and withdrawals in the case of a customer refund, per NACHA ("National Automated Clearing House Association") you must contact your bank and add the ACH ID (G592126793), to your bank account.

Failure to notify your bank with this ID may result in a hold on your funds from the credit card processor.



### Important

An active merchant account is required to share your site publicly, accept monetary donations on your home page and process credit card payments.

# Account setup

## Fees and deposit

Once your agreement is signed an invoice will be sent from our finance department with the details and request for payment. Payments can be made by check, credit card or e-check.

### Check payments

Please mail check payment to:  
999 Oakmont Plaza Drive, Suite 150  
Westmont, IL 60559

### Credit card and E-check payments

Pay through your GiveSmart invoice sent by the Intuit accounting system. If you need a copy of your invoice, email [GivingAccounting@communitybrands.com](mailto:GivingAccounting@communitybrands.com).

## Terms and conditions (GDPR)

The General Data Protection Regulation (GDPR) took effect on May 25, 2018. Organizations must provide terms and conditions to inform users of their rights with respect to personal data protection. These terms and conditions will be accessible to users upon registering and on their profile page. It is your organization's responsibility for ensuring your own compliance with the GDPR.

Any questions or concerns regarding user data should be directed via email to [eu.dpa@communitybrands.com](mailto:eu.dpa@communitybrands.com).

### To set your terms and conditions

1. As an org admin, log into e.givesmart.com.
2. Once logged in, you will land in your Org Hub.
3. Click "Campaigns" from the menu options.
4. Click "Edit" next to Terms and Conditions located in the upper right corner.



#### Important

Your deposit and terms and conditions must be complete for your campaigns to go live.

# Campaign overview

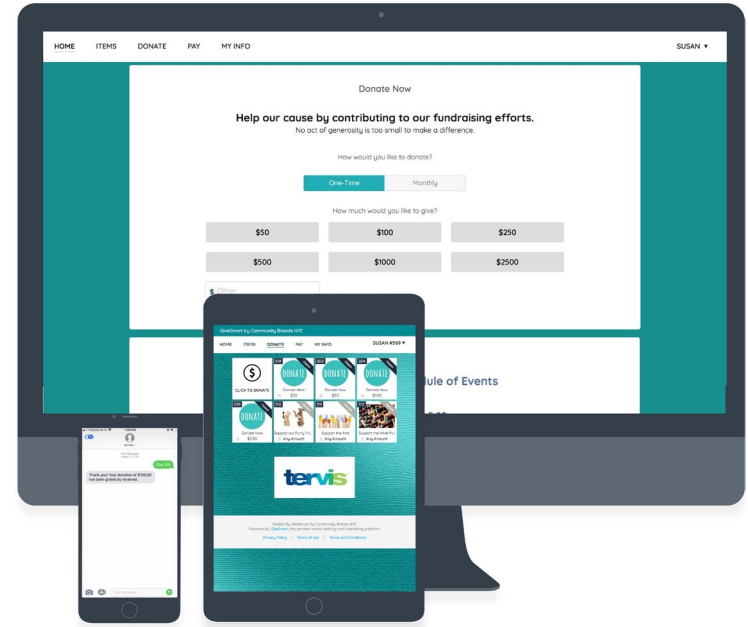
## What's a campaign?

Campaigns are fundraising sites customized to promote fundraising initiatives. There is no limit to the number of campaigns you can create. This allows you to leverage the platform and its features throughout the year!

## Features available in a campaign

A campaign can take advantage of all or some of the features; you choose depending on your fundraising initiative!

- Ticket sales
- Seating management
- Donations
- Recurring giving
- Items - silent, live, instant, raffles, votes
- Auction
- Point of sale purchases
- Virtual presentation page
- Peer-to-peer fundraising
- Competitive fundraising



# Campaign overview cont.

## Get started!

When you log into your Org Hub, you will find at least one campaign created to get you started. You can also create a new one.

1. As an org admin, log into e.givesmart.com.
2. Once logged in, you will land in your Org Hub.
3. Click “Campaigns” from the menu options.
4. Select a campaign or click “+ New Campaign”.

## Capture donations

Include a donation form on your Home page allowing supporters to donate to your initiative!

1. Once in your campaign, select “Settings” from the menu.
2. Click “Donations”.
3. Scroll to the Donate Now form section and select “Show”.
4. Write a compelling call to action within the description field.
5. Review the preset donation levels or edit and create your own.

Note: A payment is required by supporters to complete a donation.

## Create an item

Items can be many things... silent or live auction items, instant purchase items, donation items, raffles and votes. Be sure to visit the Help Center to learn more details.

1. Once in your campaign, select “Items” from the menu.
2. Click “+ New Item”.
3. Select the type of item and complete the form.

Note: We recommend keeping the visibility set to Live on individual items. If you’re not ready to share with the public just yet, set the visibility for the Items page that donors see to “Preview” by visiting Settings>Auction.

## Create a ticket or sponsorship

Offer tickets or sponsorships to your online/virtual or in-person event.

1. Once in your campaign, select “Tickets” from the menu.
2. Click “Settings”.
3. Click “New Ticket” and complete the form.

Note: We recommend setting the visibility to Show and selecting a start and end time.



# Campaign overview cont.

## Order form

Include an order form on the Home page for supporters to purchase tickets, sponsorships, instant items, and raffles. The opportunity to donate is included as part of the order form.

1. Once in your campaign, select “Settings” from the menu.
2. Click “Design Center”.
3. Navigate to Pages>Home>Call to Action.
4. In the Order Form section, select “Show”.
5. Click “Customize” to add tickets, sponsorships, instant items or raffles to the order form.

## Customize color and banner

Give your campaign its own look and feel to complement your initiative’s theme.

1. Once in your campaign, select “Settings” from the menu.
2. Click “Design Center”.
3. Choose “Color and Style” to adjust the overall color scheme.
4. Choose “Pages” then Home>Banner to adjust your Home page banner.

## Make your site public

Making your site public allows for all visitors to see your site.

1. Once in your campaign, on the Dashboard in the Site container click “...” and select “Settings”.
2. Set the visibility to Show.

Note: This sets the overall site visibility. Visibility of Items and Donate pages can be managed independently by clicking Settings in the menu and then either Donate or Auction. After clicking Donate or Auction, you’ll find the visibility option.

## Set a keyword for text messages

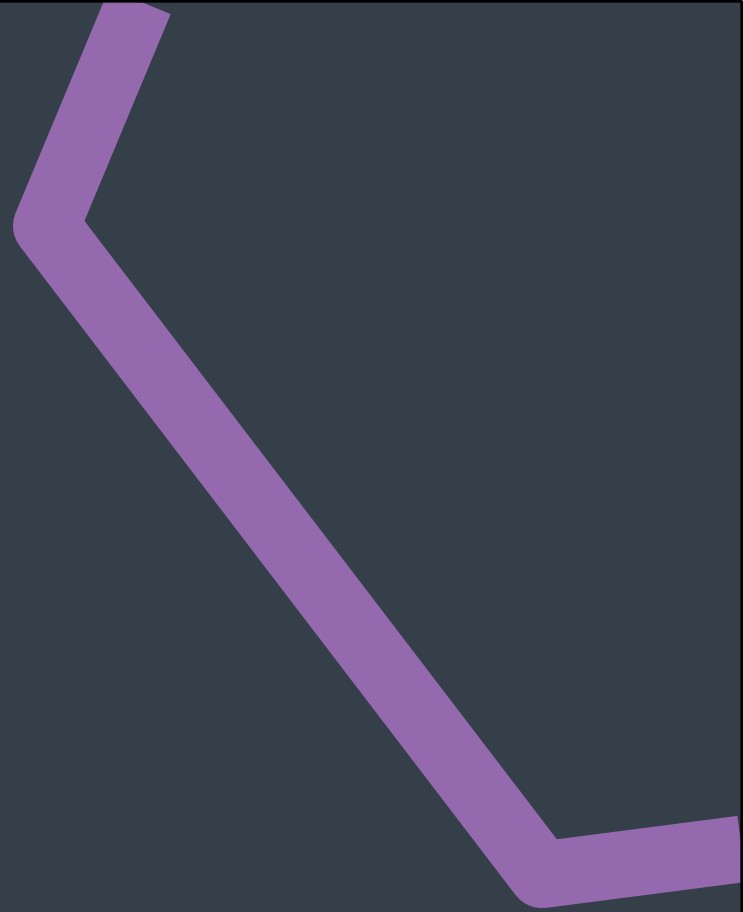
Make your site easy to remember by setting a keyword. Your keyword determines your event URL (i.e. keyword.givesmart.com) and acts as the short code used to register via text message (i.e. text KEYWORD to 76278).

1. Once in your campaign, on the Dashboard in the Site container click “...” and select “Settings”.
2. Enter a name for your campaign in the “Keyword” field. Max. 15 characters.

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# Resources

Need to know at your fingertips



## Support

### Help Center

Log into your campaign or Org Hub at [e.givesmart.com](https://e.givesmart.com), then click the “Help” button for how-to articles, videos and webinar information.

### Chat

Log into your campaign or Org Hub at [e.givesmart.com](https://e.givesmart.com), click the “Help” button then “Contact us”

### Email

[support@givesmart.com](mailto:support@givesmart.com)

### Phone

Call 855.322.4483 x 1 between 9am and 9pm ET, Monday - Friday. When calling outside normal business hours, please leave a message and your call will be returned promptly.

## Customer enablement webinars

We offer a series of webinars to set you up for success in utilizing the platform features.

Visit the Help Center for the current list of webinars and times available. Contact support with any questions or assistance with registration.

## Ideas and inspiration

Visit [givesmart.com/blog](https://givesmart.com/blog) for inspiration and ideas that have been successful for other organizations.