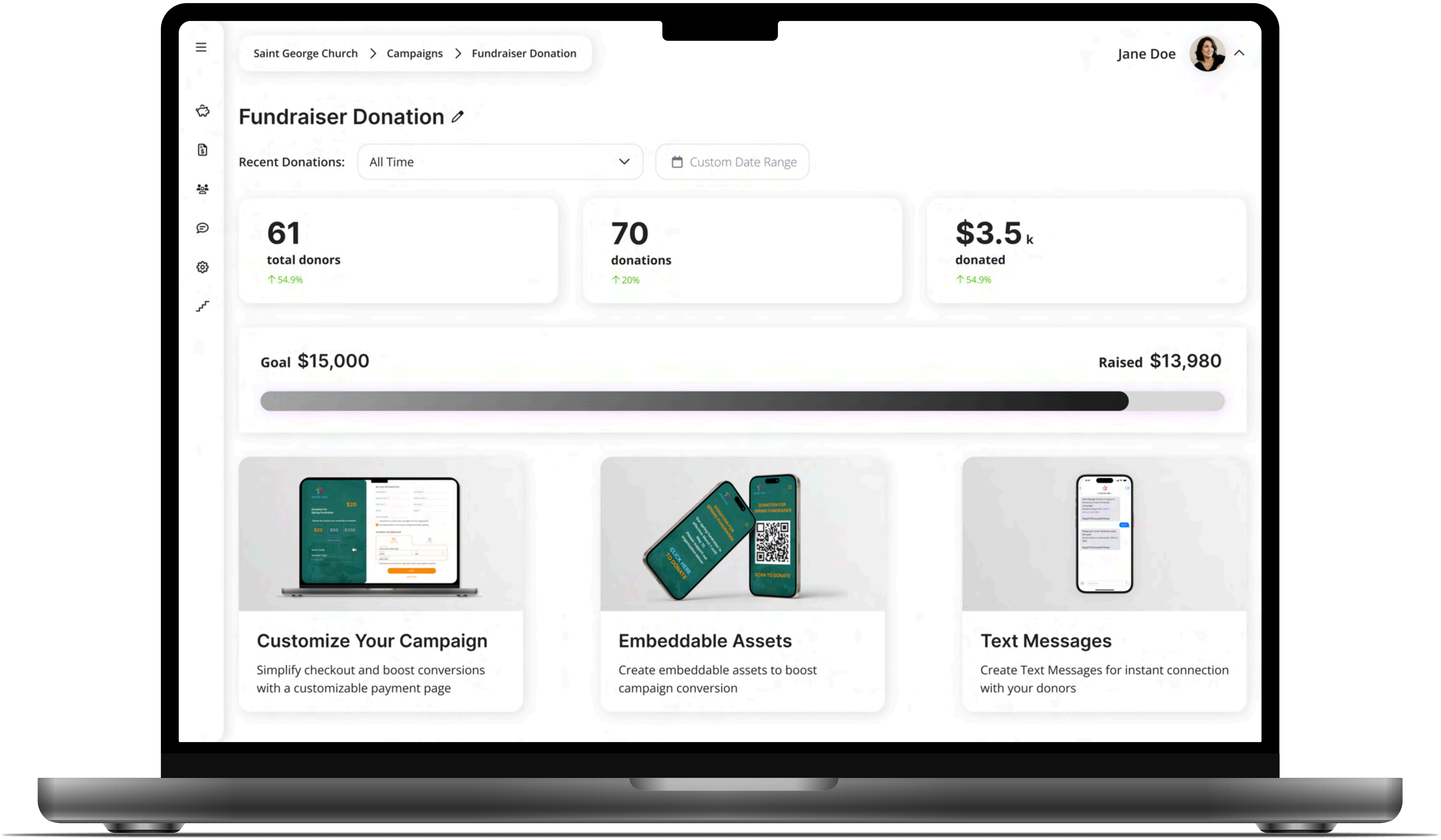
A Quick Start Guide to the Giving Platform



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Getting Started: Add New Campaign

When logged in, you will be directed to the Campaigns page.

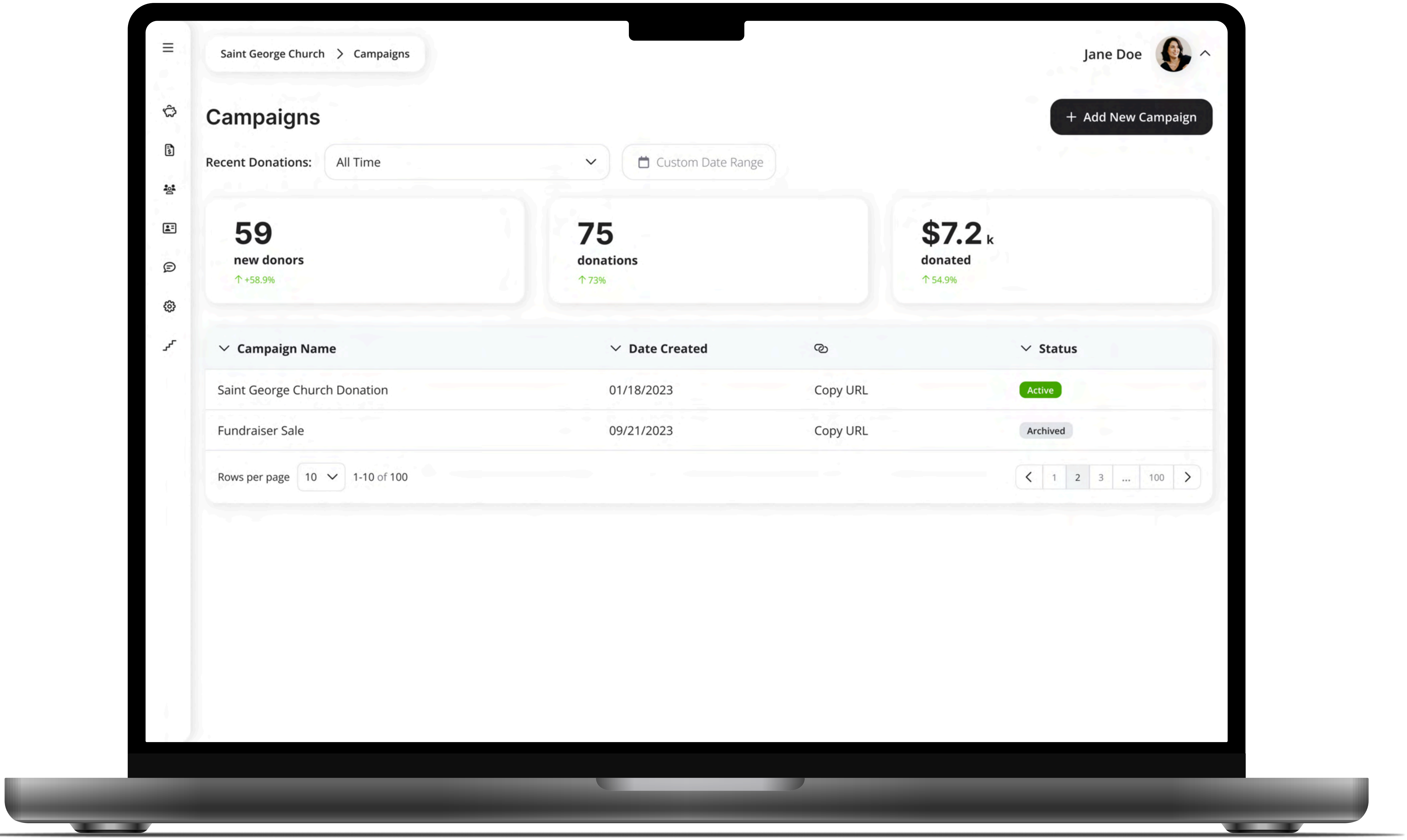
A Campaign is a major fundraising cause (i.e. “Saint George Church Donation”), which can be divided into specific Funds (i.e “General Fund” or “Feed the Homeless”).

Donors will be able to allocate donations between Funds on the Campaign Payment Page.

To create your first Campaign, click on the + Add New Campaign, input a Campaign name, and optionally set a monetary goal. Once saved, your first Campaign will appear on the Campaigns table.

Campaign status, by default, is Active meaning the Campaign is visible to your Donors. Clicking on a Status badge will allow you to change Campaign Status from Active to Archived .

Once Archived, Campaign Payment Pages and all Embeddable Assets will become disabled to your Donors. You will still be able to access all Campaign Data and can change the status to Active at any time.

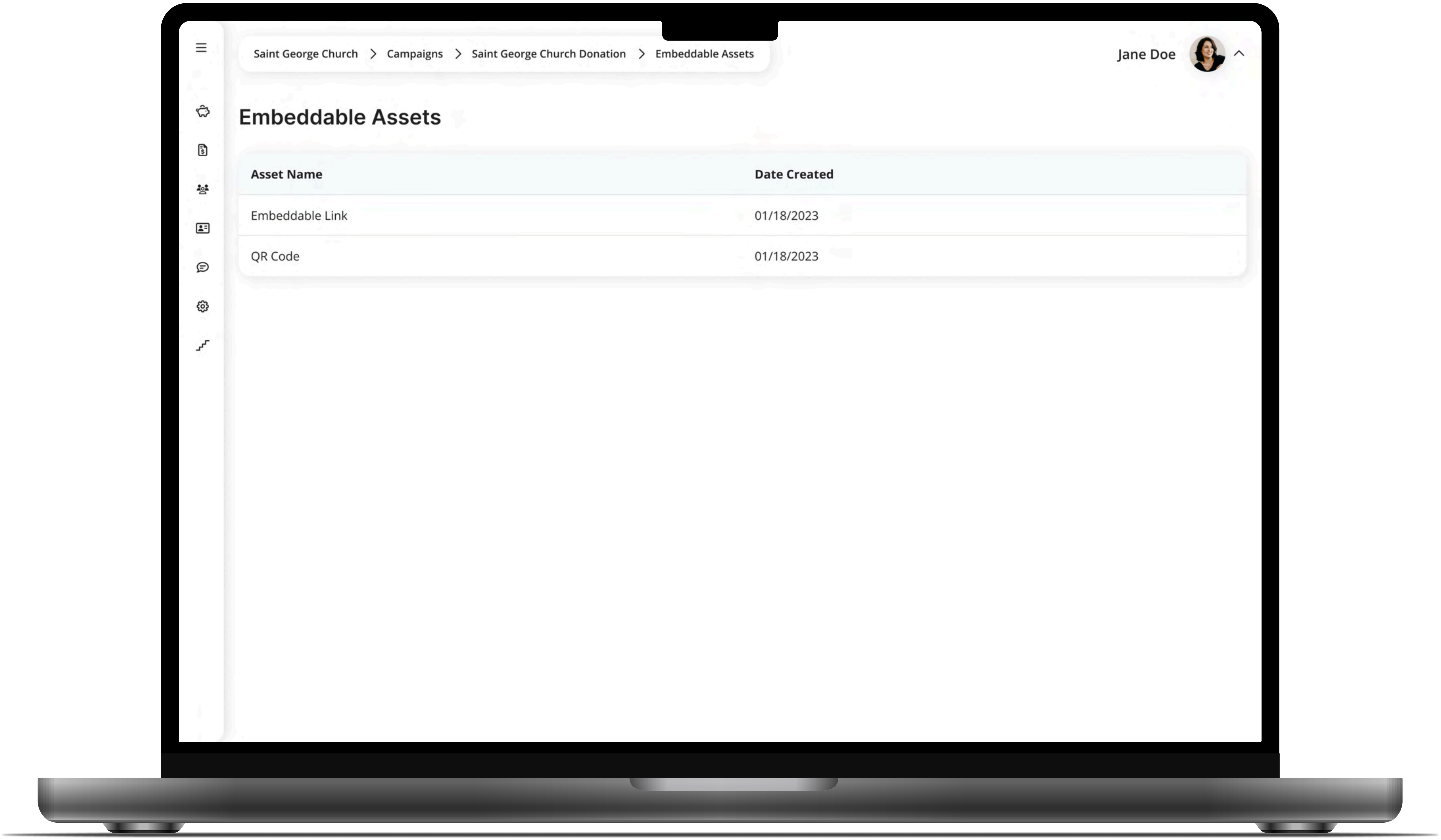


Embeddable Assets

There are two types of Embeddable Assets that are designed to bring your Donors to a Campaign Payment Page:

1. Embeddable Link
2. QR Code

When opening an Embeddable Assets page, you will see a table with available assets and date created, which is the date when you created current Campaign. Click on each asset name on the table to learn more.

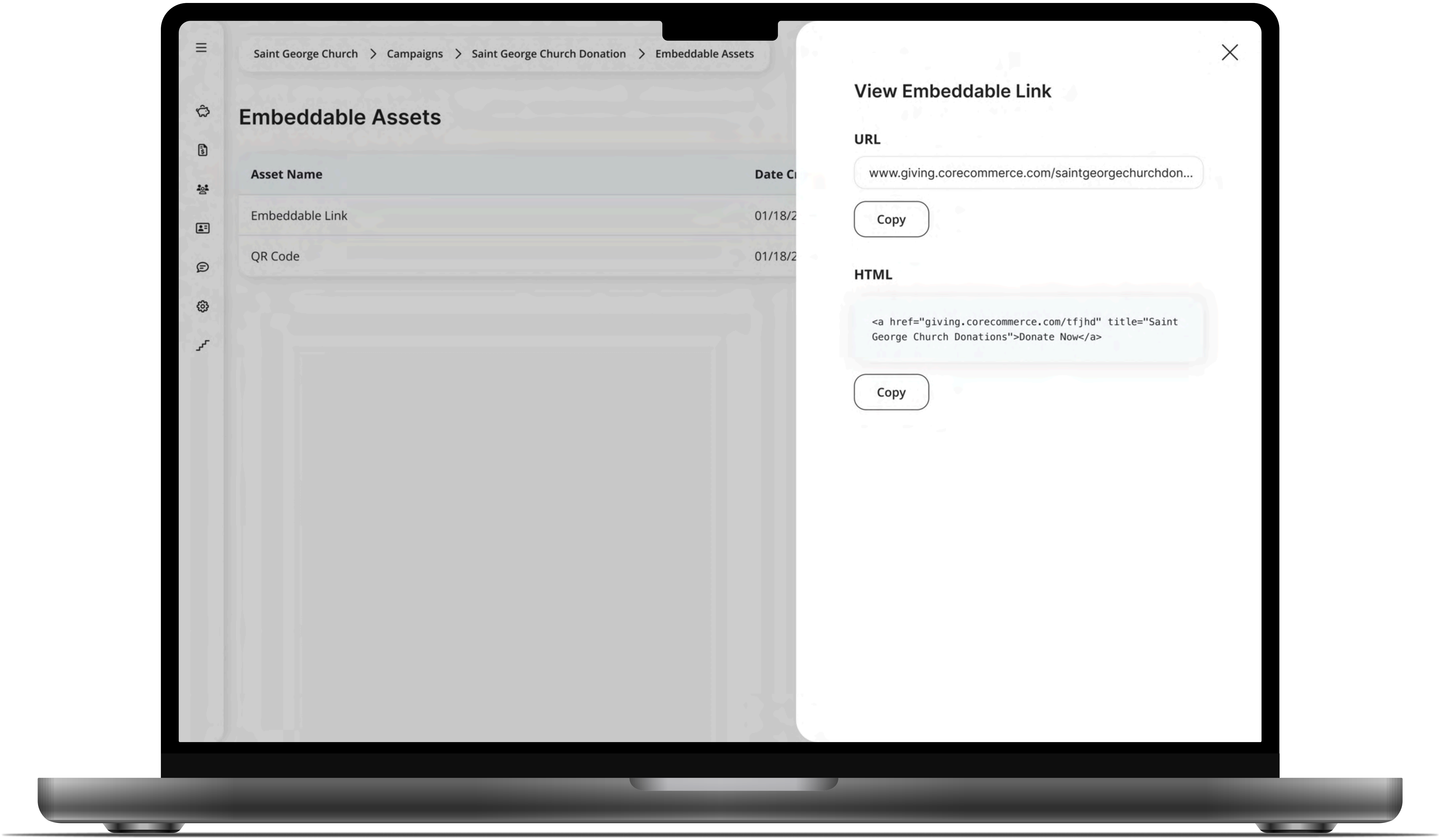


Embeddable Assets: Link

Click on Embeddable Link asset on the table and you will see a drawer with two link options:

1. URL: you may copy a URL link and paste it into your browser to see a Campaign page like your Donors will see it. When you are ready for your Campaign to go live, share the link via messages, on your social media, and other channels for more people to see it.

2. HTML code: this is the same link in a form of a code in case you would like to paste a link on your website or app.

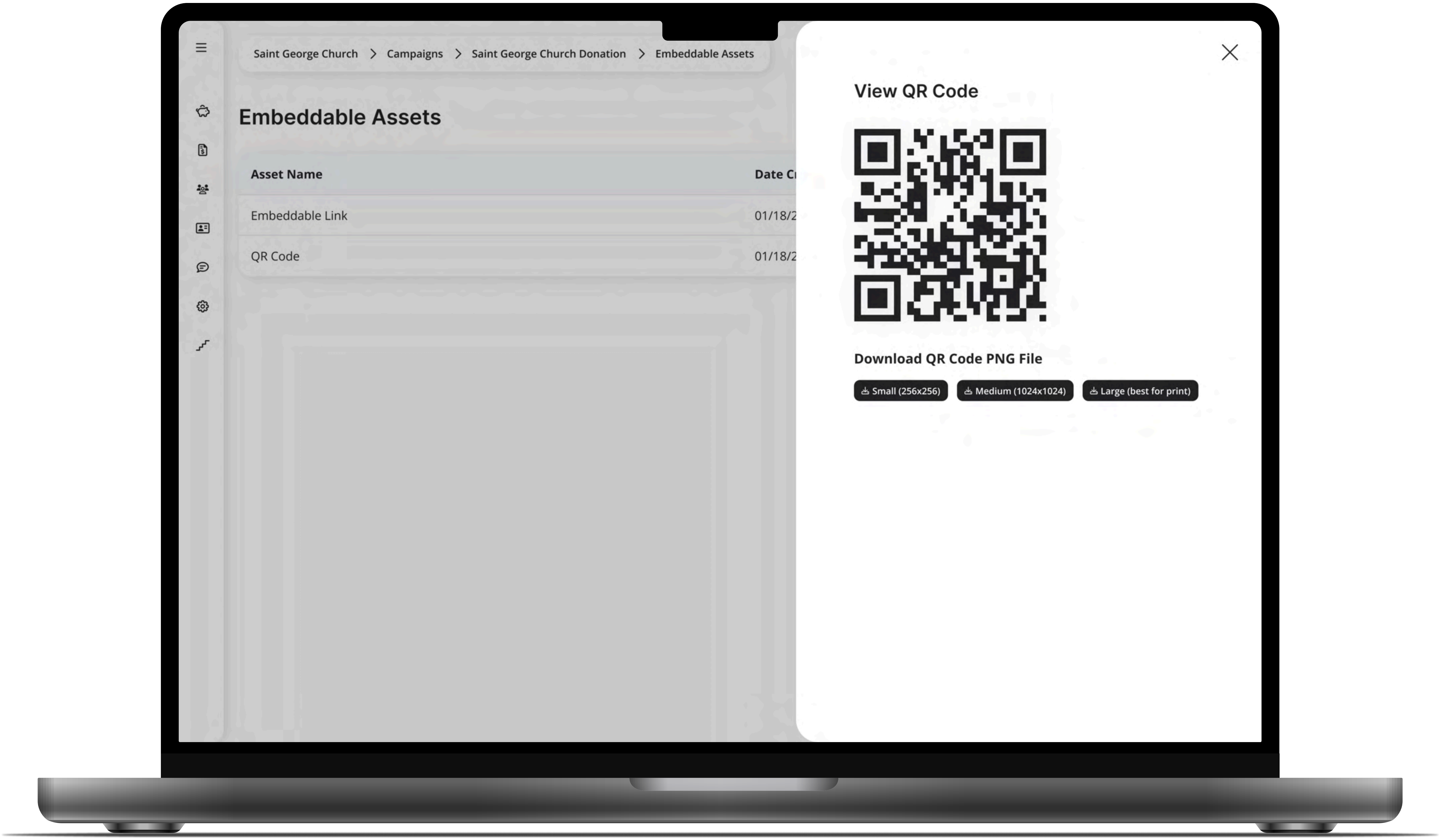


Embeddable Assets: QR Code

Click on QR Code asset on the table and you will see a drawer with a QR code preview and 3 download options.

You can download a png file with a black QR code in 3 sizes for different purposes: print it on your small promo flyers, posters, or big city promo banners.

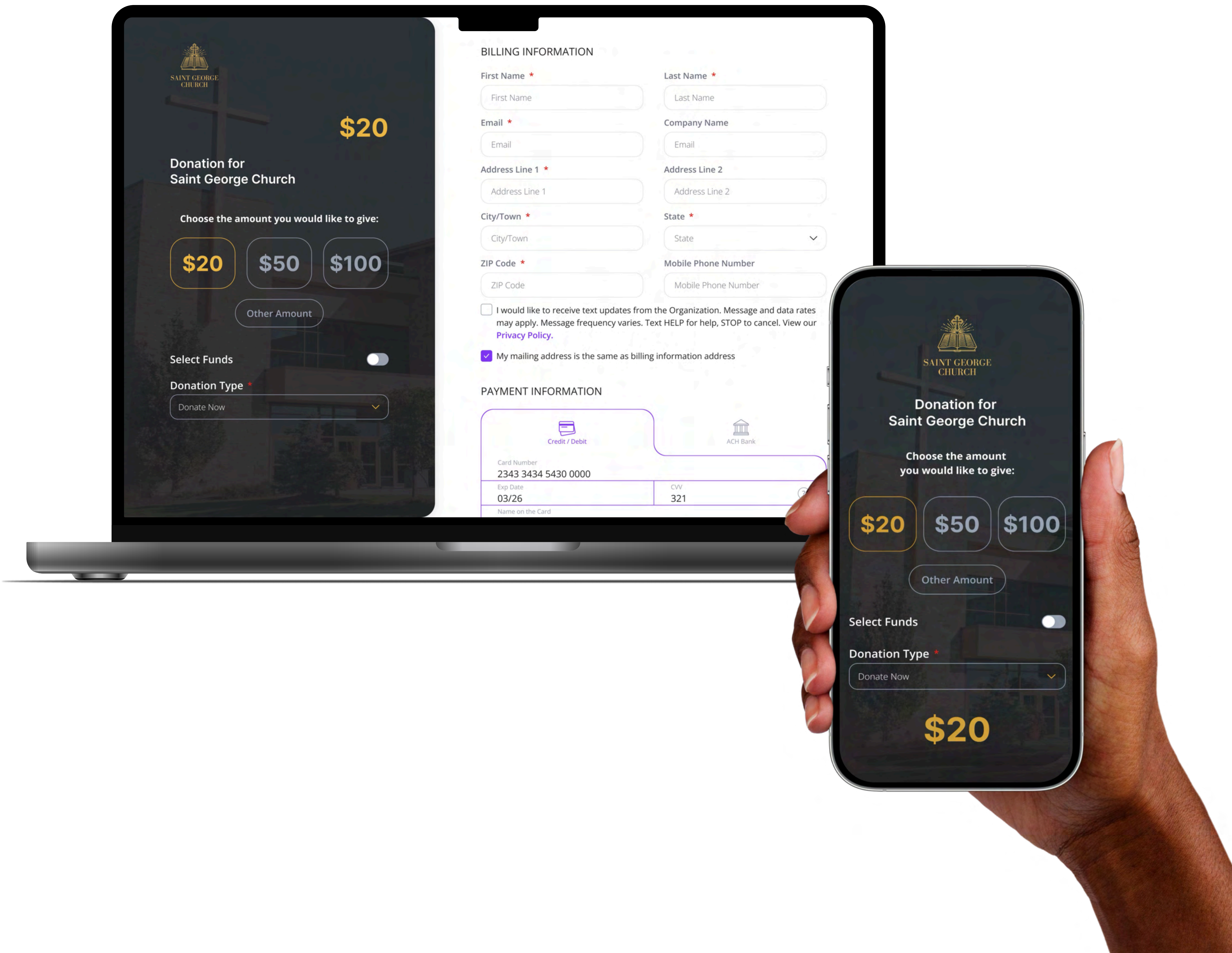
Scanning this code with a camera of your phone will bring you to the Campaign page that your Donors will see.



Customize Your Campaign

On the Customize Your Campaign page you can tailor your Campaign payment page in a real-time preview to align with your goals. There are three tabs for full Campaign customization:

- Design Tab: Make your Campaign unique by adjusting design elements to fit your organization's style.
- Payments Tab: Configure payment options and customize the checkout process to ensure a smooth transaction for your donors.
- Options Tab: Manage donor engagement by enabling marketing consent and redirecting donors to your website.



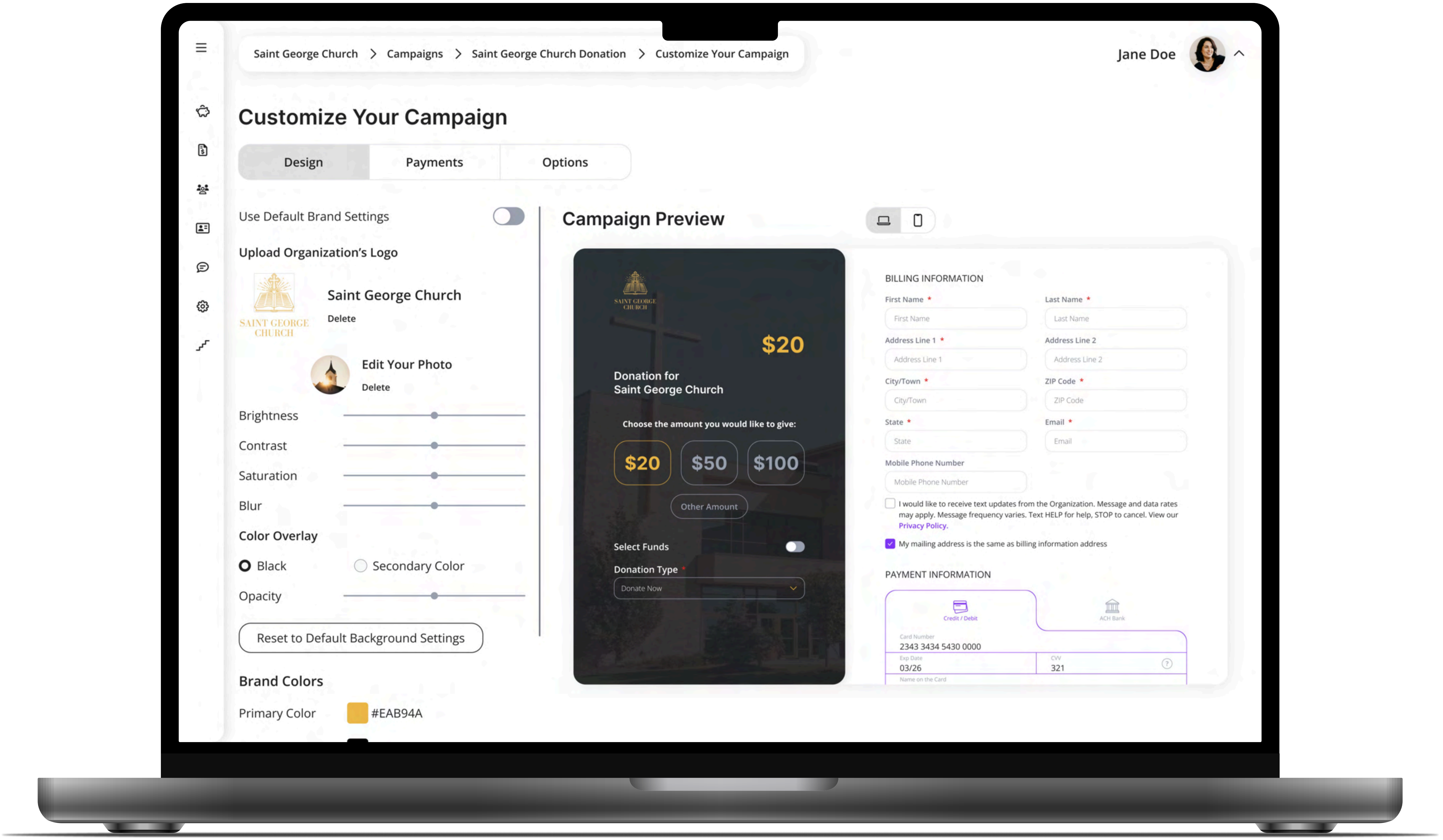
Customize Your Campaign: Design

On the Customize Your Campaign page, the Design Tab allows you to make your Campaign unique by adjusting design elements to fit your organization's style.

By default, the Use Default Brand Settings toggle is on, meaning that your organization's branding from the Settings → Branding section will be displayed.
You may follow Customize your Organization’s Branding link to set your Organization’s branding.

Switching the Use Default Brand Settings toggle to off will allow you to add a new logo, background photo, color overlay, brand colors, choose buttons color and shape, and Campaign font. These custom design changes will apply only to the current Campaign page.

You may easily switch between a Desktop and a Mobile view of the Campaign page to preview changes.

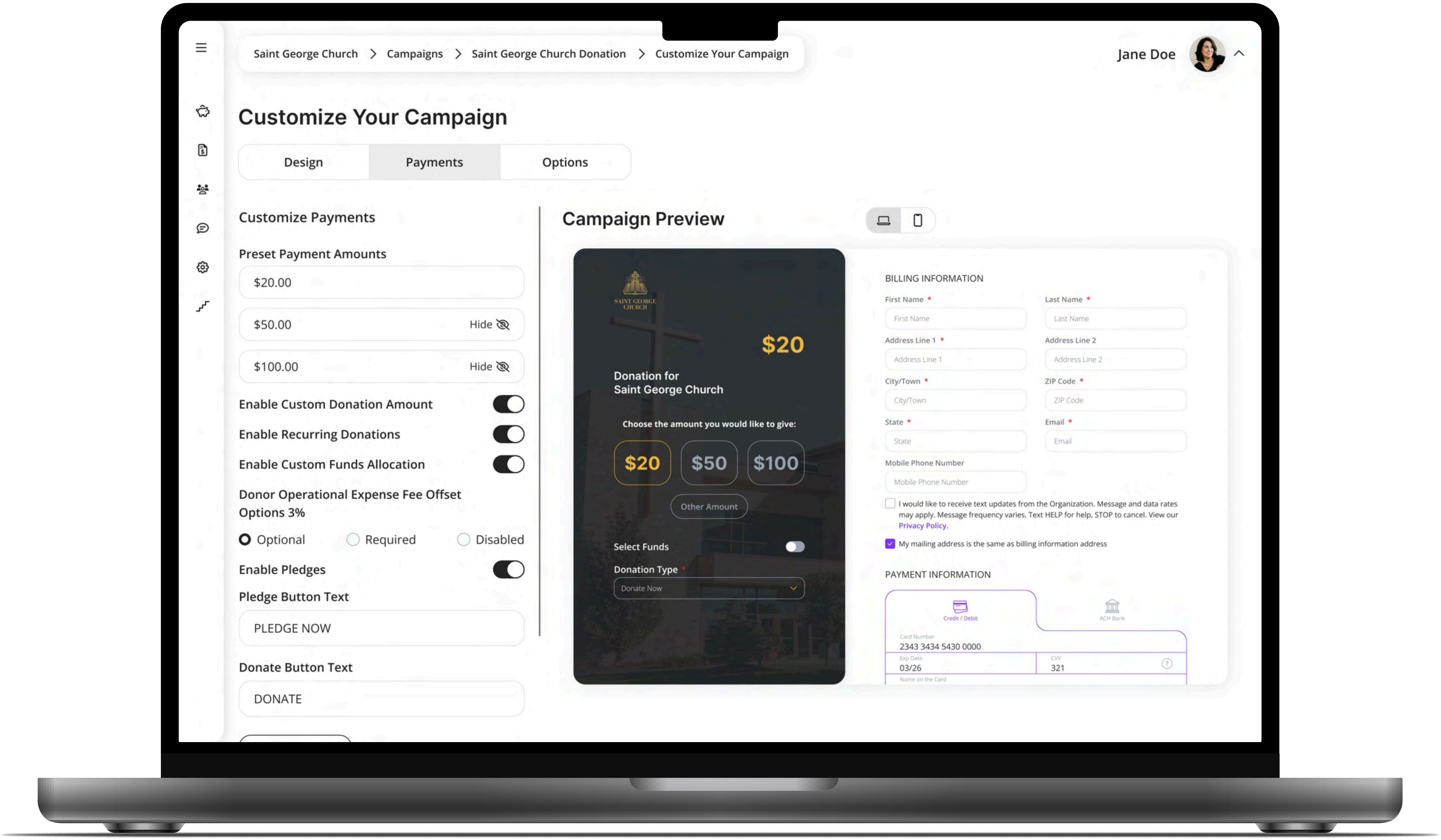


Customize Your Campaign: Payments

The Payments Tab allows you to configure payment options and customize the checkout process to ensure a smooth transaction for your donors.

Custom options include:

- Preset up to 3 payment amounts
- Enable custom donation amount
- Enable recurring donations
- Enable selectable funds
- Set donor operational expense fee offset options
- Enable pledging (a Pledge is a Donor’s promise to make a donation in future, upon submitting a form a Donor will be billed on a future date chosen);
- Customize button text for Donations and Pledges shown on the Campaign page.



Customize Your Campaign: Options

The Options tab allows you to:

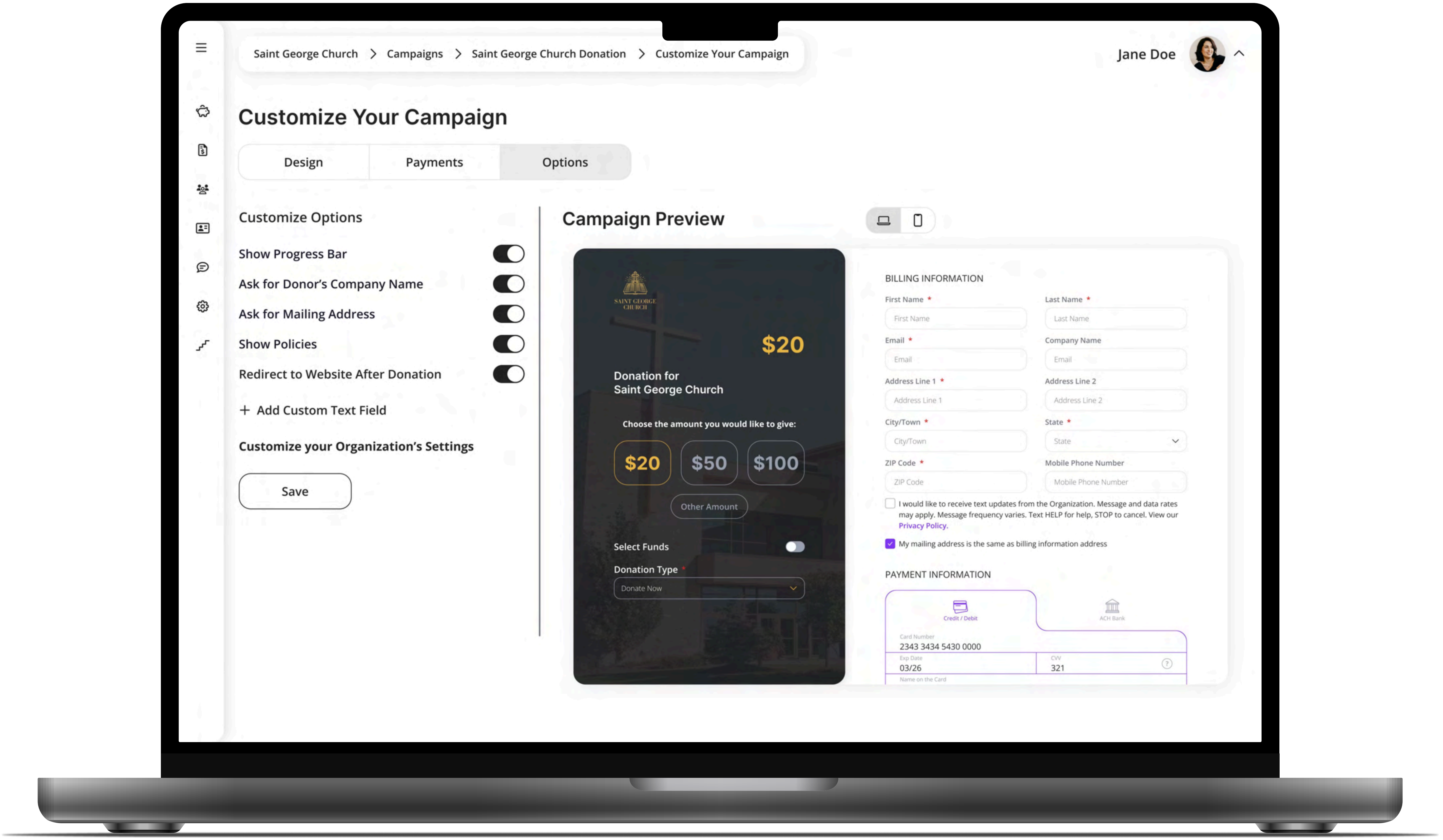
- Display the Campaign progress bar
- Show Organization policies on the Campaign page
- Redirect donors to the organization's website post donation

The website redirect can be managed on the Organization Settings page. The toggle is set to Off by default, which means that after making a donation, donors will see a 'Thank you' message, and the campaign page will return to its default view.

Other Options include:

- Collect donor's mobile phone number
- Collect donor's mailing address
- Collect donor's company name
- Add Custom fields

Add up to four custom text fields. Custom fields can be made optional or required. If a custom field is filled out, the information will be captured and displayed in various reporting, including the CSV export.



Donors

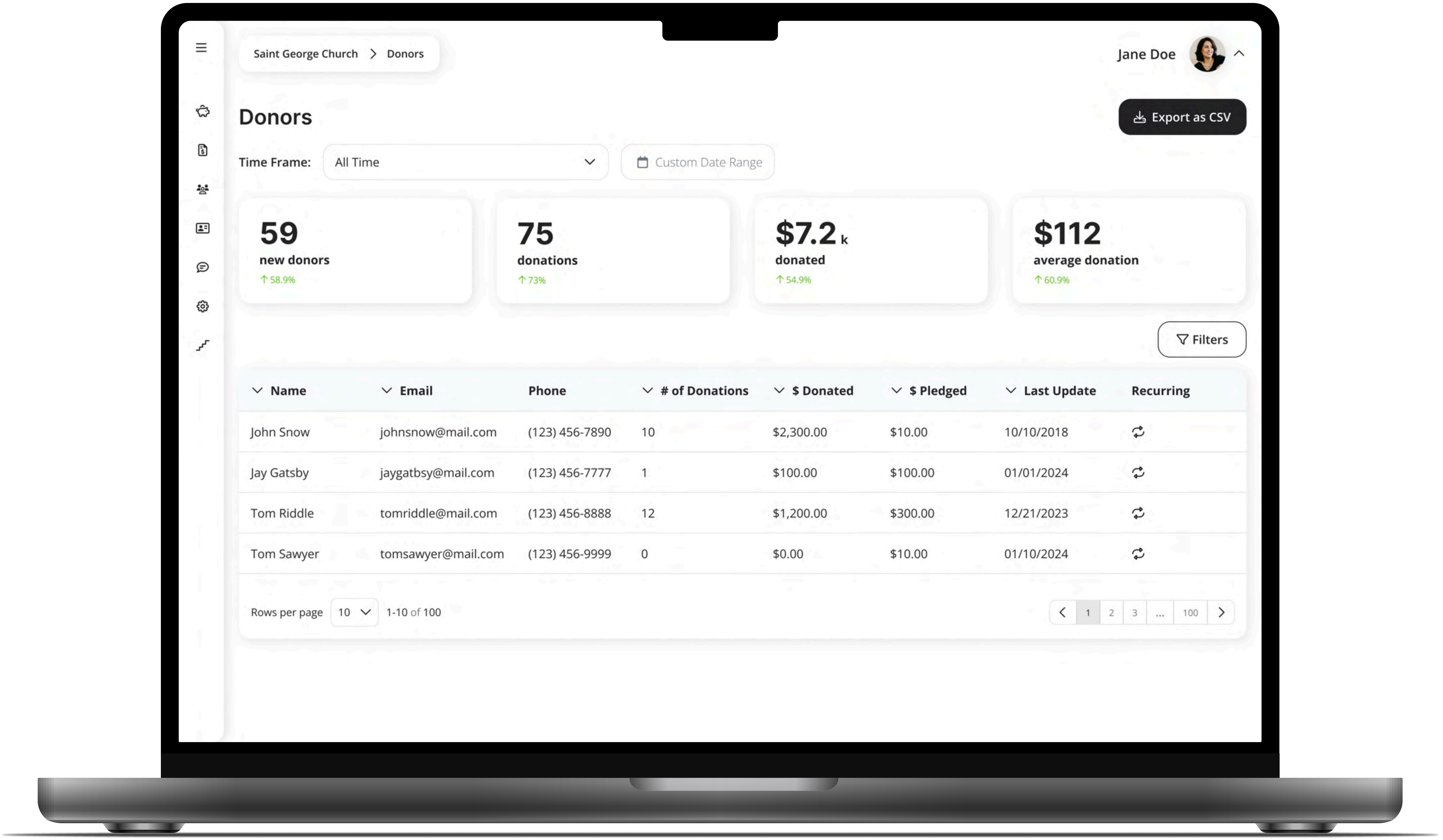
The Donors page showcases a database of all of your Donors across Campaigns.

Donor KPI Cards are designed to track Donors activity to analyze effectiveness of your Campaigns. Sort KPI data by Filters and compare different periods of your fundraising efforts.

To export the Donors database to your device as a file, click on Export as CSV.

Clicking on the Recurring Icon will open the Recurring Donations page allowing you to track your Donors' contribution and analyze the effectiveness of your fundraising Campaigns.

Click on the Amount Donated on the table to see the Donations page with all transactions filtered to that specific Donor. Do the same for Pledges.



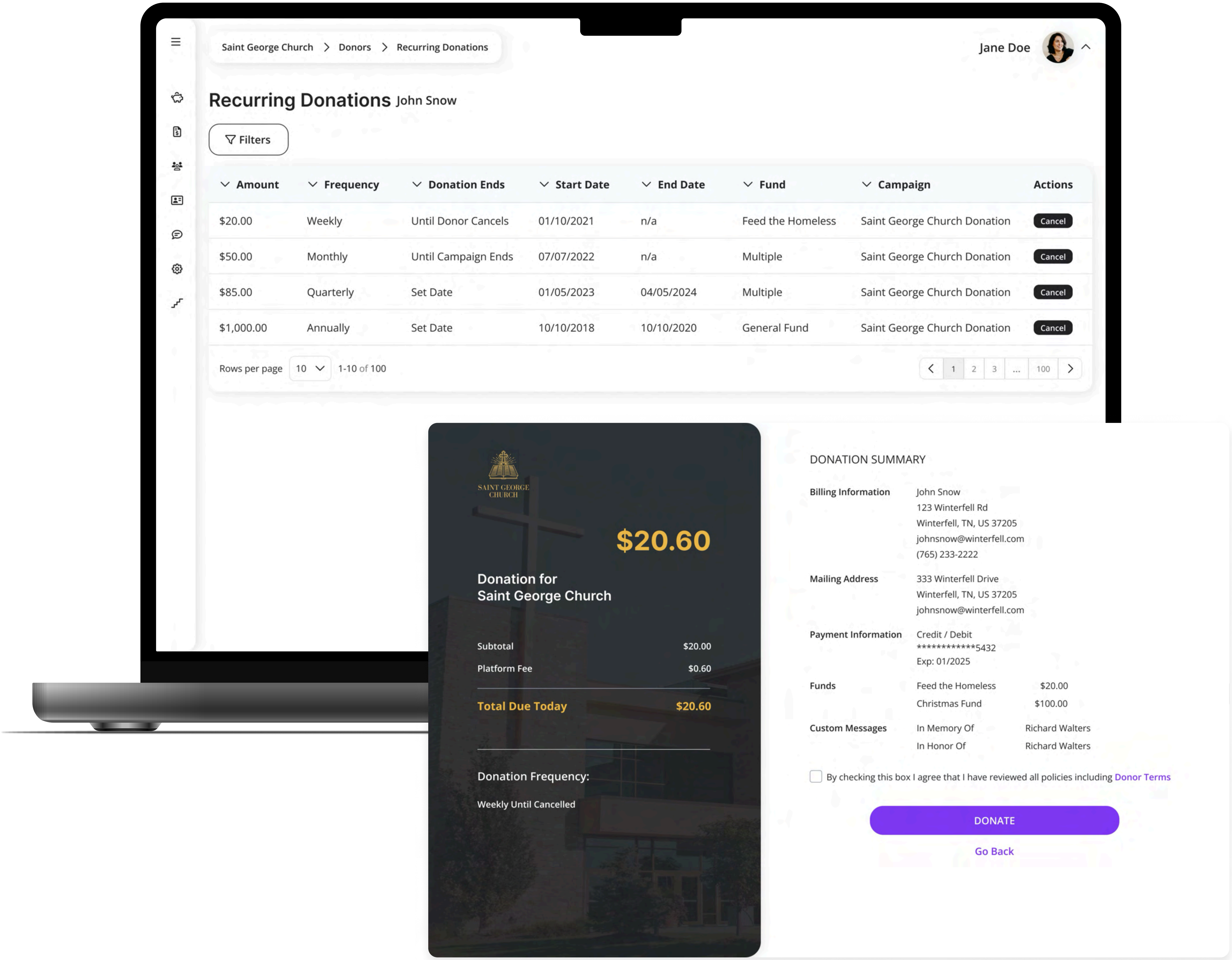
Recurring Donations

Clicking on Recurring Icon on the Donors page opens a Recurring Donations page.

A Recurring Donation appears on the table when a Donor chooses a Recurring Donation option on the Campaign payment page.

A Donor will be able to check the Donation frequency when making a Donation on the second page of a Campaign page. If a Donor would like to cancel a Recurring Donation, they should contact the Organization to do so.

To cancel a Recurring Donation, an Organization Admin should click on Cancel in the Actions column.



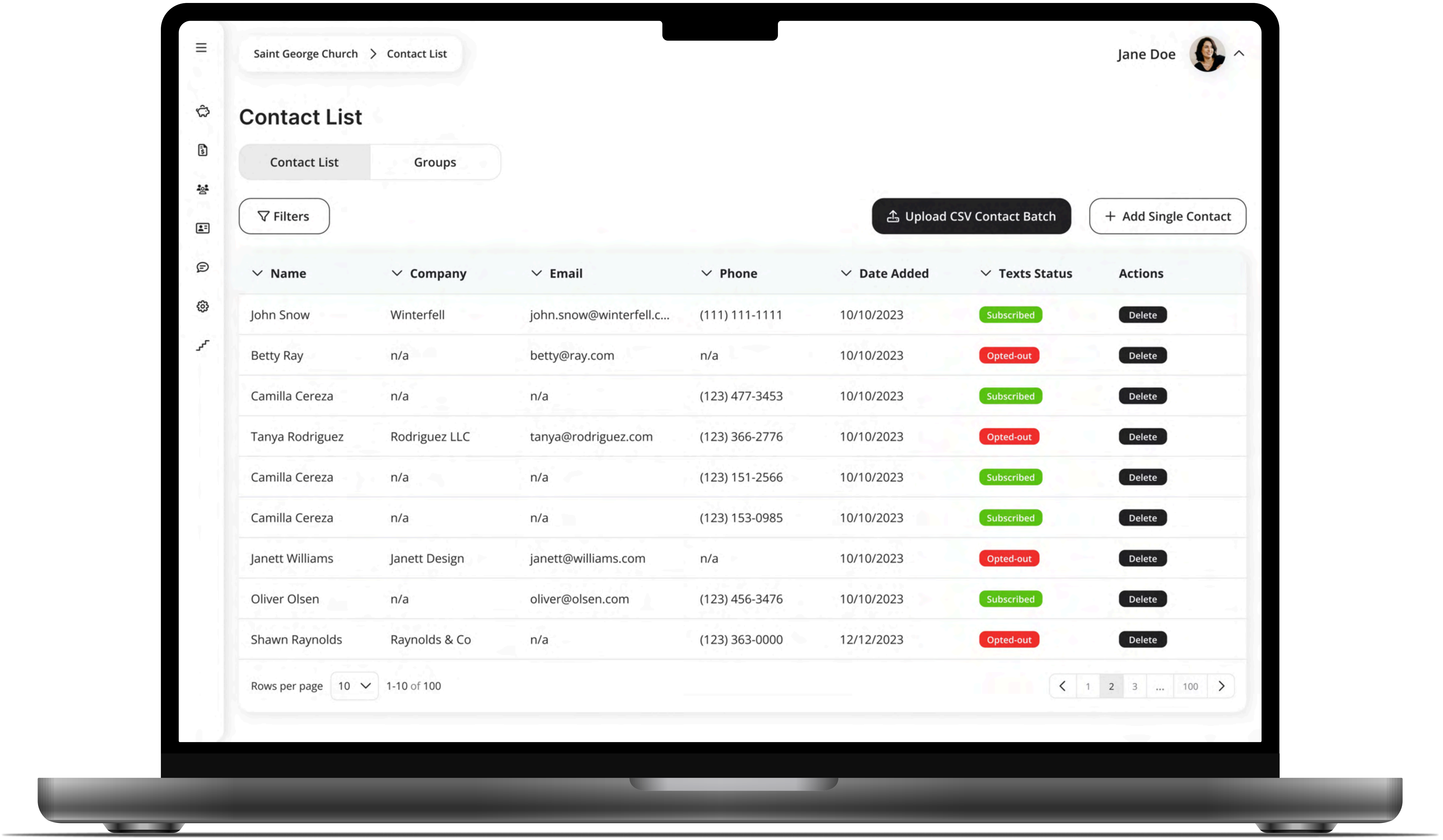
Contact List

The Contact List page allows you to create a database of contacts which can be used to message through the Text Messaging feature of the Giving Platform.

To manually add a single Contact, click on + Add Single Contact and input the necessary fields.

To upload a batch of contacts at once, click on Upload CSV Contact Batch download the CSV template and fill out the applicable fields. Once the CSV file is filled out, save and upload.

Another way for the contacts to appear on your Contact List is when a donor makes a donation and marks the checkbox that they would like to receive text updates from your organization.

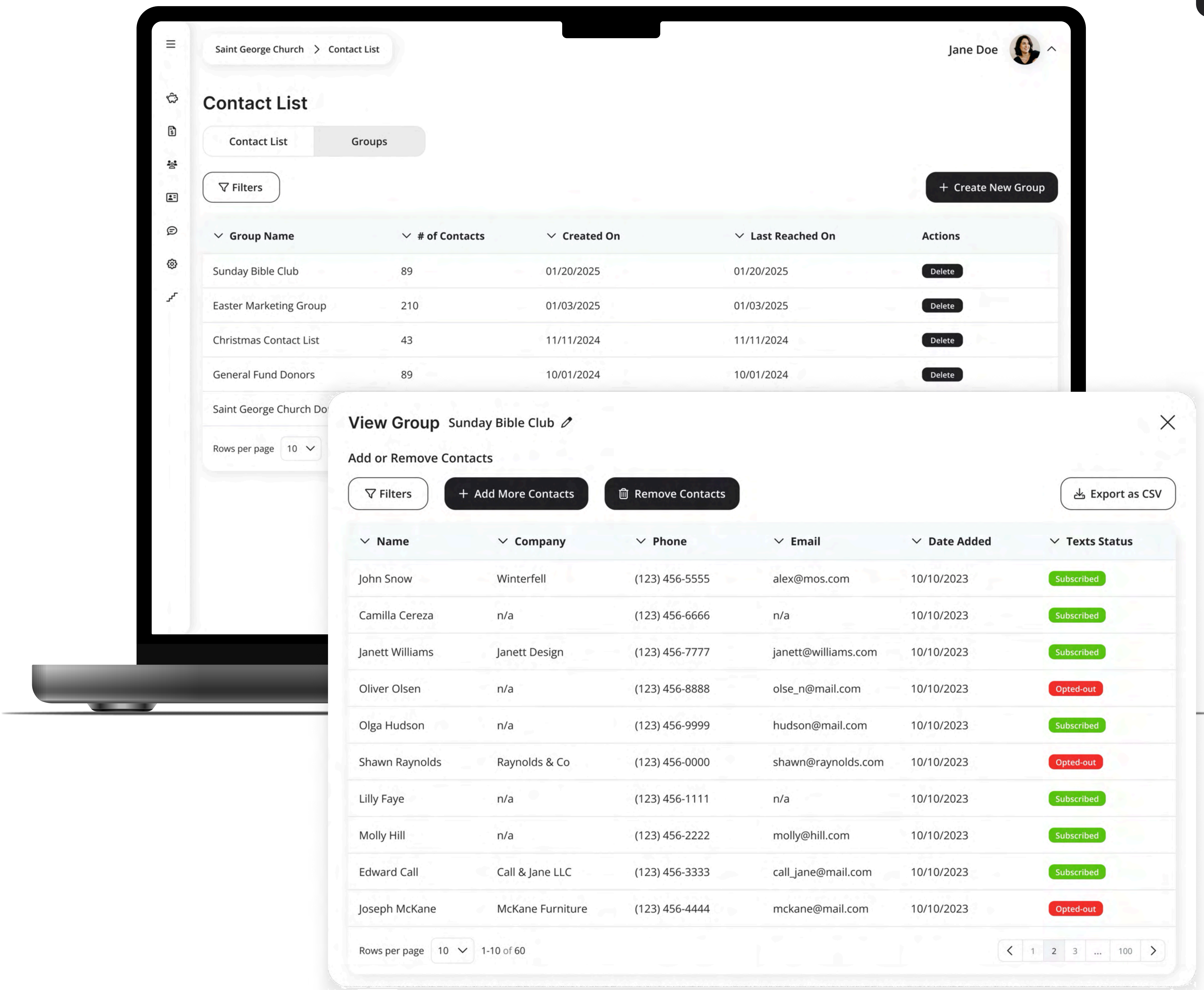


Contact List: Groups

On Contact List page Groups tab you can form contact Groups from the existing Contacts. Click on the + Create New Group button and name your Group. Click on the Group name on the table to see your Group contacts, edit Group name, export Group contacts, add or remove contacts from the current Group.

In order to Add or Remove Contacts from the current Group, click on the corresponding button of the View Group pop-up. You should see a full list of all Contacts within your Organization. Filter the results and choose contacts to add or remove from the current Group.

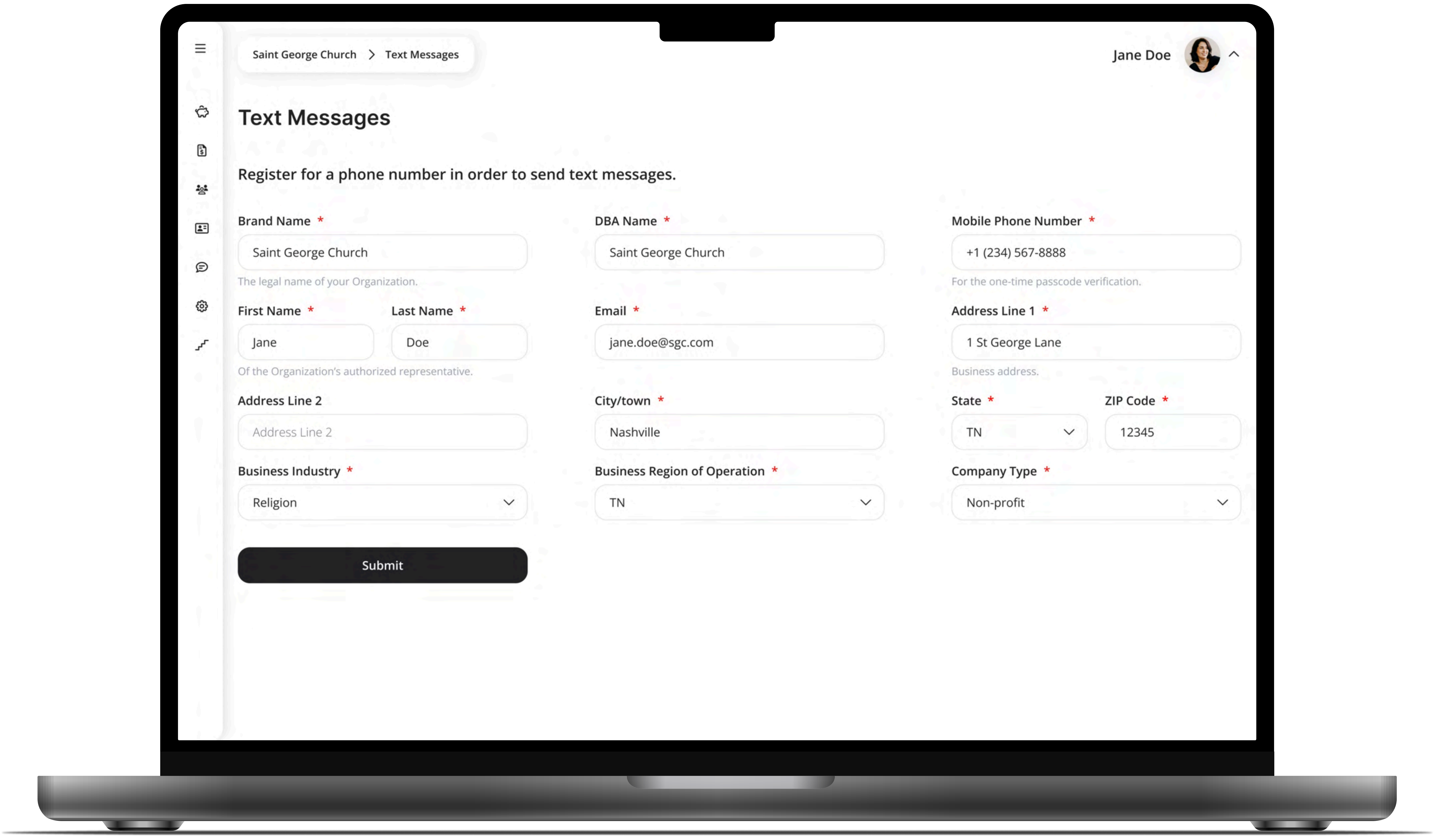
Use Groups when adding recipients of the Text Messages.



Text Messages:
Phone Number Registration

Click on the Text Messages menu item on the left navigation bar. If your giving platform tier contains the Text Messaging feature, you will be taken to the Phone Registration screen with fields pre-filled with your organization’s information. If everything is correct, select the {Submit Button}.

Note: Upon submitting this form you will be notified about success or failure of the registration. Once the registration is complete, you will be able to choose a 'Sending From' phone number for your organization.



Text Messages

Once the ‘Sending From’ phone number is selected you will be directed to the Text Message Dashboard. The top righthand corner of the page will display the ‘Sending From’ Number that is specific to your Organization.

To create a text message, click + Create New Text Message . Once selected, a pop-up will appear with fields for generating the text message.

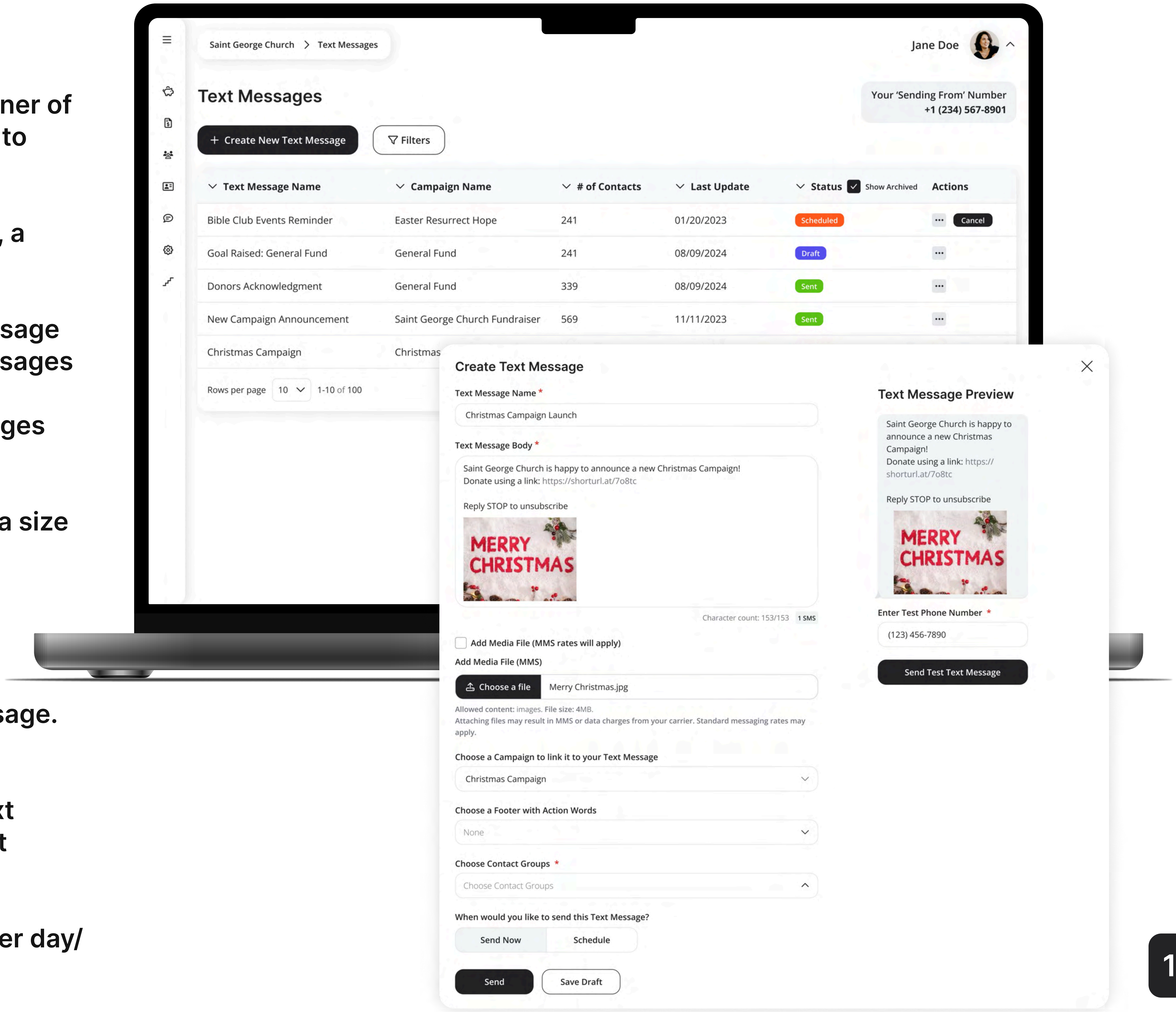
Any field with a * is required. The first step is to add a Text Message Name, which is used to track the message within your Text Messages dashboard. Next, fill out the Text Message Body, which is the messaging that the text recipient will receive. Note: SMS messages are limited to 306 characters.
You can also upload a file to turn your text message into MMS (Multimedia Messaging Service). MMS messages are limited to a size of 4MB.

You will have the option to link a specific campaign to your text message as well as include a footer with action words.

Choosing Contact Groups is mandatory for sending a text message.

The right side of the text message pop-up box includes a Text Message Preview window that will allow you to see what the text recipient will receive. You will also have the option to send a text message to yourself as proof by selecting Send Test Text Message

Lastly, you will have the option to Send or Schedule for a later day/ time as well as Save Draft .



Financials:
Donations and Donation Receipts

The Donations page can be found in the Financials section. This page contains a list of all Donation transactions with detailed information: date and time, Donor's name, amount donated or pledges, funds allocation, Campaign name, payment method, recurring settings, and status.

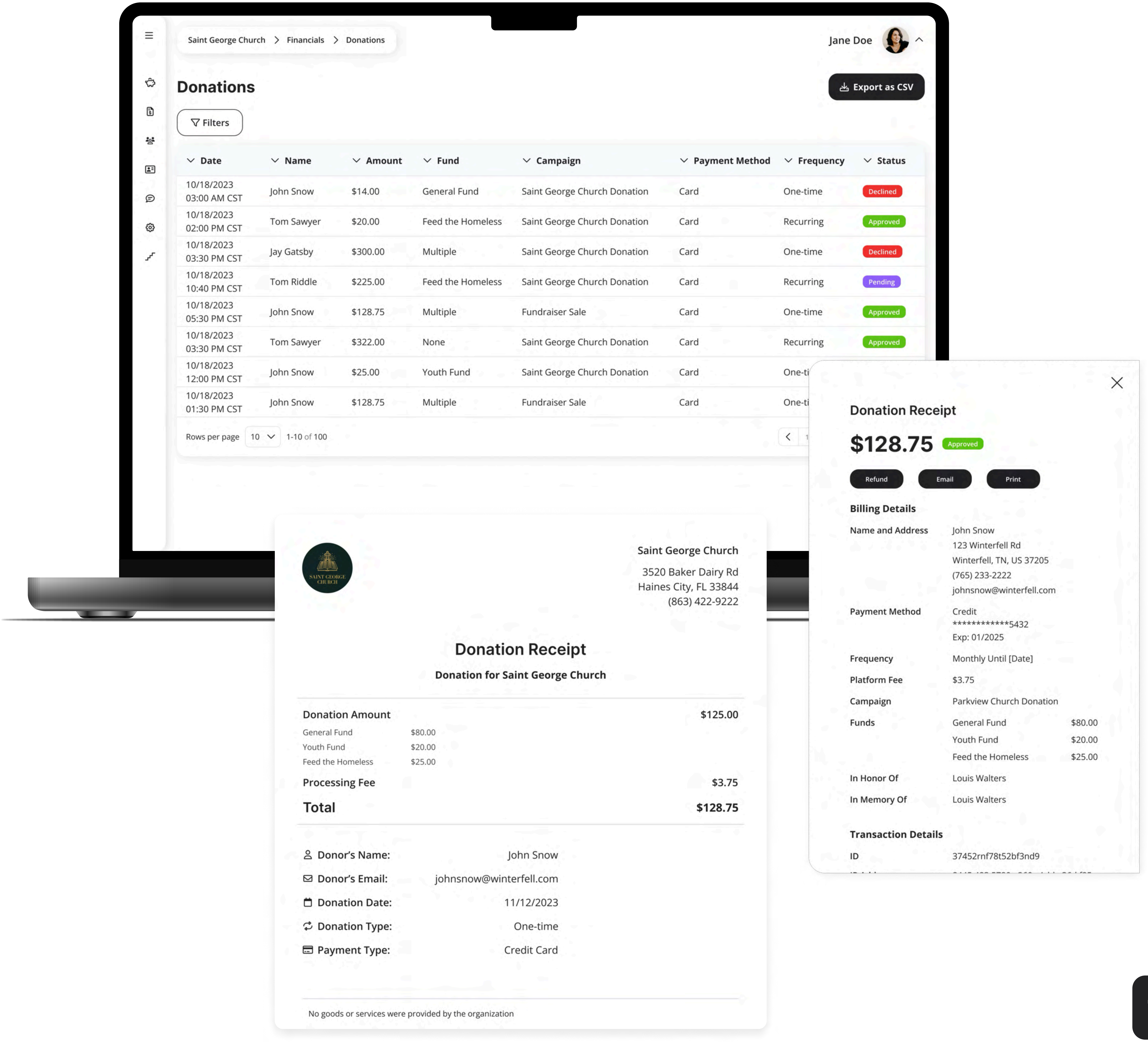
To export the Donations database, click on Export as CSV.

Status badge shows the status of the Donation transaction. Clicking on the Amount opens a Donation Receipt drawer with detailed Donation information and three action buttons: Refund, Email and Print.

Click on Refund button and confirm the action, you will see the status and the drawer of that Donation change.

Click on Email button and enter an email where you would like to email the Donation Receipt. Mind that it is being automatically sent to your Donor upon making a Donation.

Click on Print button and it will open a PDF Donation Receipt in a new window. You may print or save a file.



Financials: Pledges

The Pledges page is located in the Financials section. This page contains a list of all Pledges with detailed information, including Donor's name, email, amount pledged and amount donated (meaning that the Pledge was fulfilled). The table will reflect the Fund allocation, dates when Pledge was made and when it is due, and its status.

The Delete action button can be used to remove a Pledge, ensuring that the donor will not be billed.

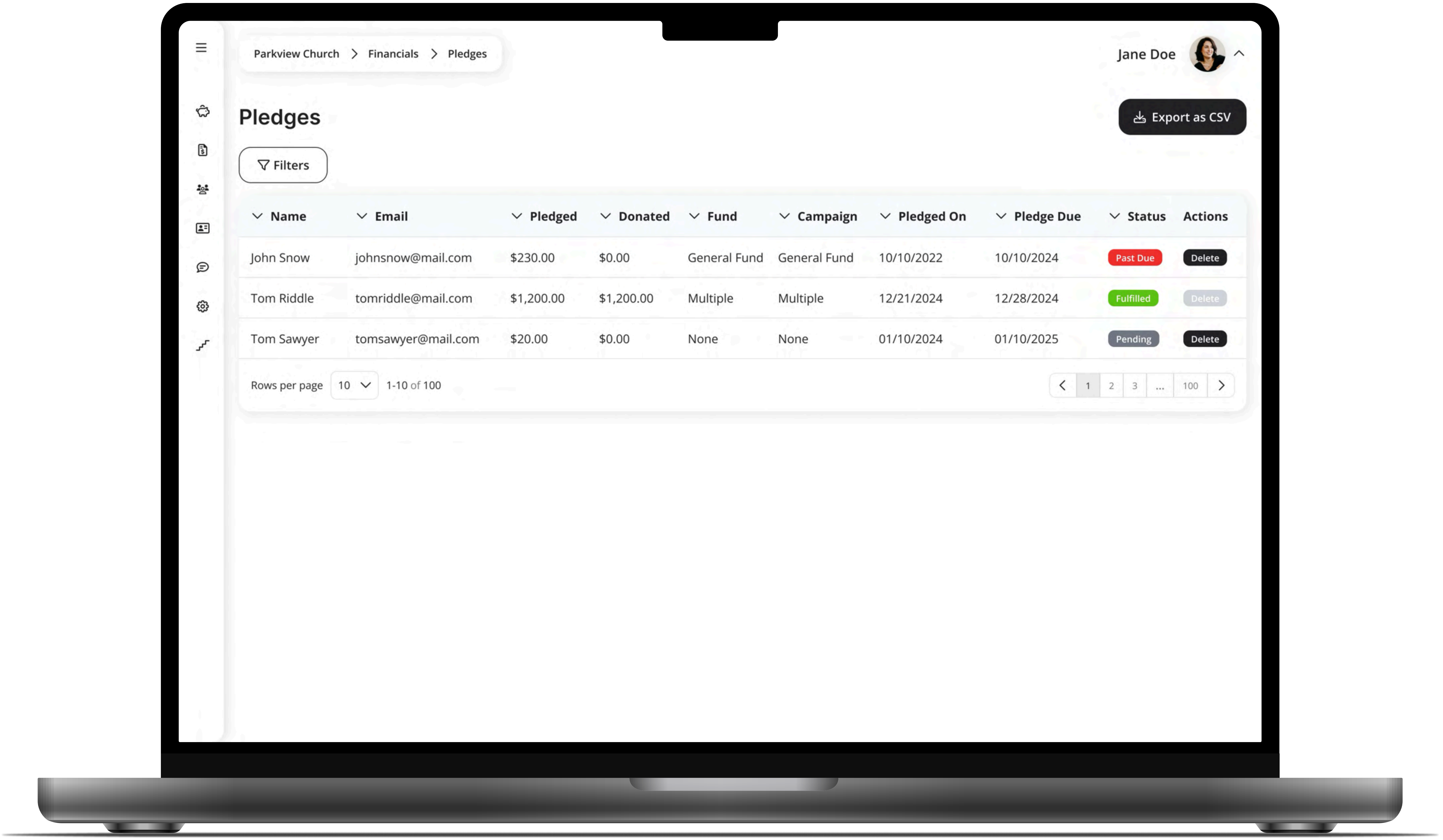
To export the Pledge database, click on Export as CSV.

The Status badges for a Pledge are:

Pending Pending status means that the Pledge was made and the Donor will be billed in the future.

Past Due Past Due status means that the Donor was not billed on the set date because of a credit card or ACH issue on the Donor's side.

Fulfilled Fulfilled status means that the Donor was billed successfully.



Financials: Funds

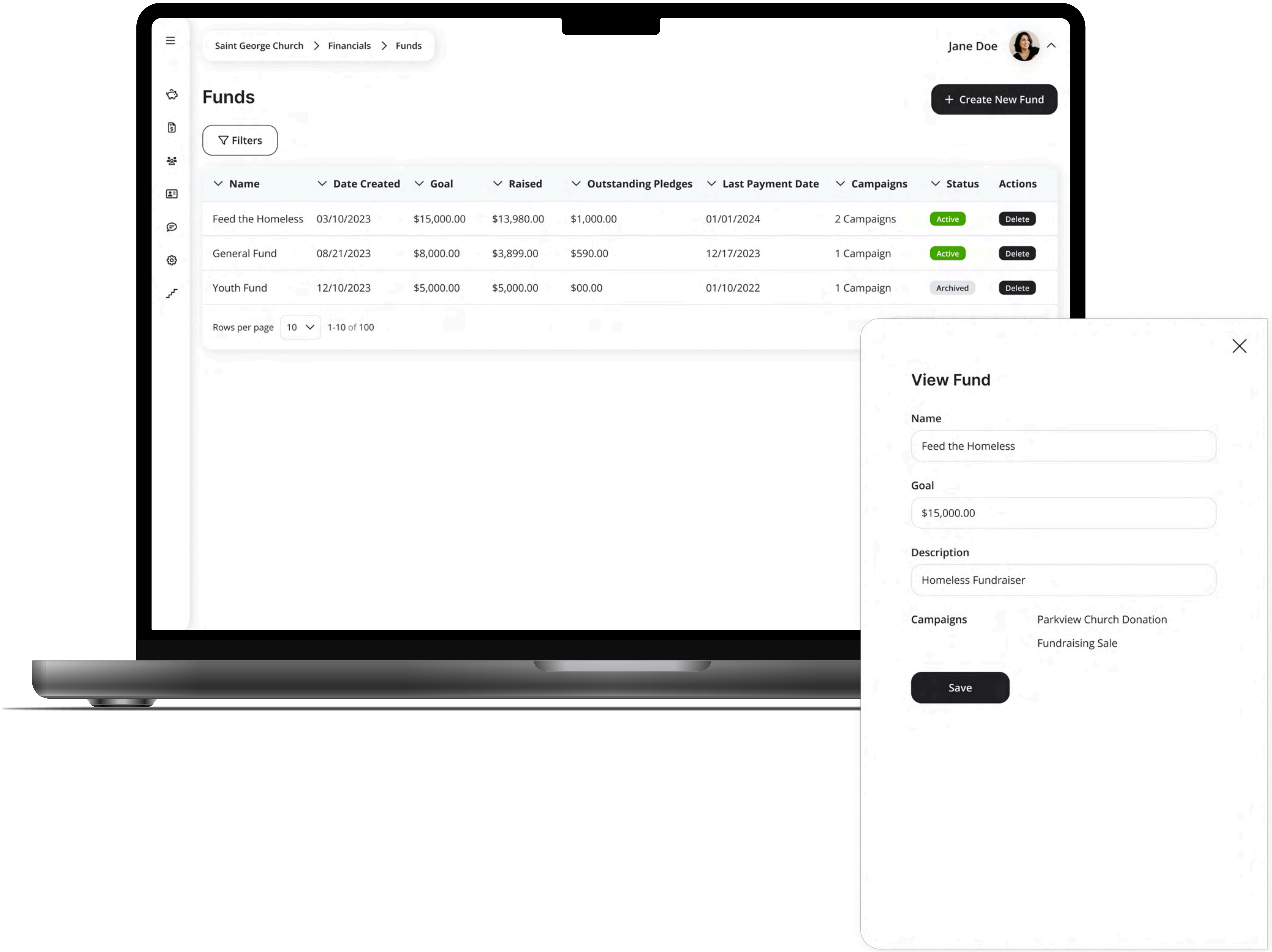
Funds are specific financial needs defined by your organization. Funds can be linked to a Campaign to help achieve its objectives.

When making a Donation or a Pledge, a Donor can allocate their funds between multiple Funds created within a Campaign.

To view a Fund, click on its name to access and modify its details.

Toggle between Active and Archived to control the Funds visibility. Archiving your fund will disable it, but you can reactivate it at any time.

You may also Delete a Fund, however, this is a permanent action that will erase all the Fund data.

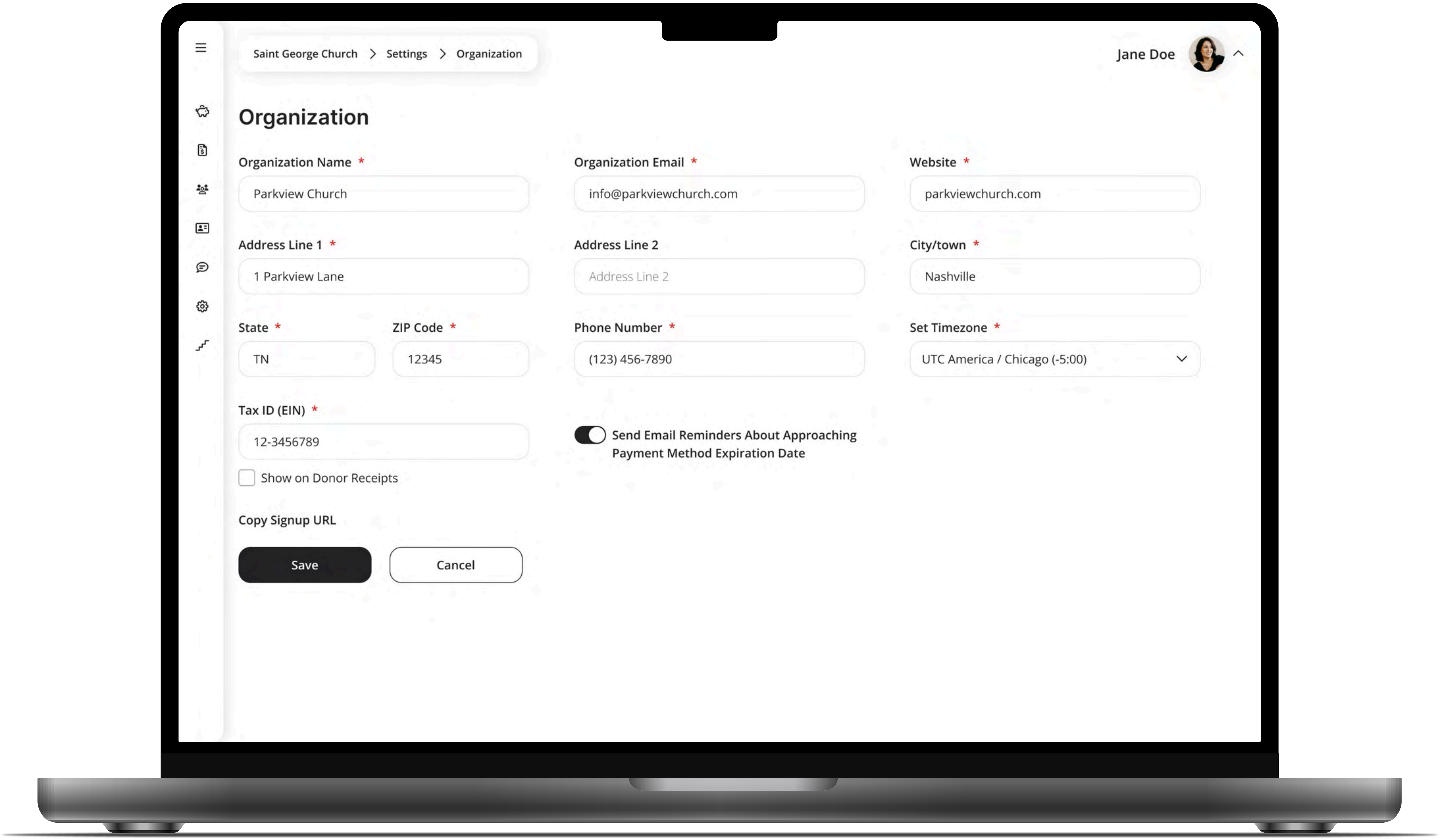


Settings: Organization

Organization Admin can customize their Organization's profile to ensure accurate information.

The Organization Website is where the Donor will be redirected to after making a Donation (if redirect is enabled). The Tax ID (EIN) number is 9-digit identifier that you can choose to display on the Donor Receipt.

"Copy Signup URL" is a link that can be shared with donors who would like to have access to the Donor Portal. Once registered, donors can track their past donations, see all active Campaigns tied to your Organization and set default payment methods.



Settings: Team

Streamline your organization's workflow by inviting new Team Members and assigning roles.

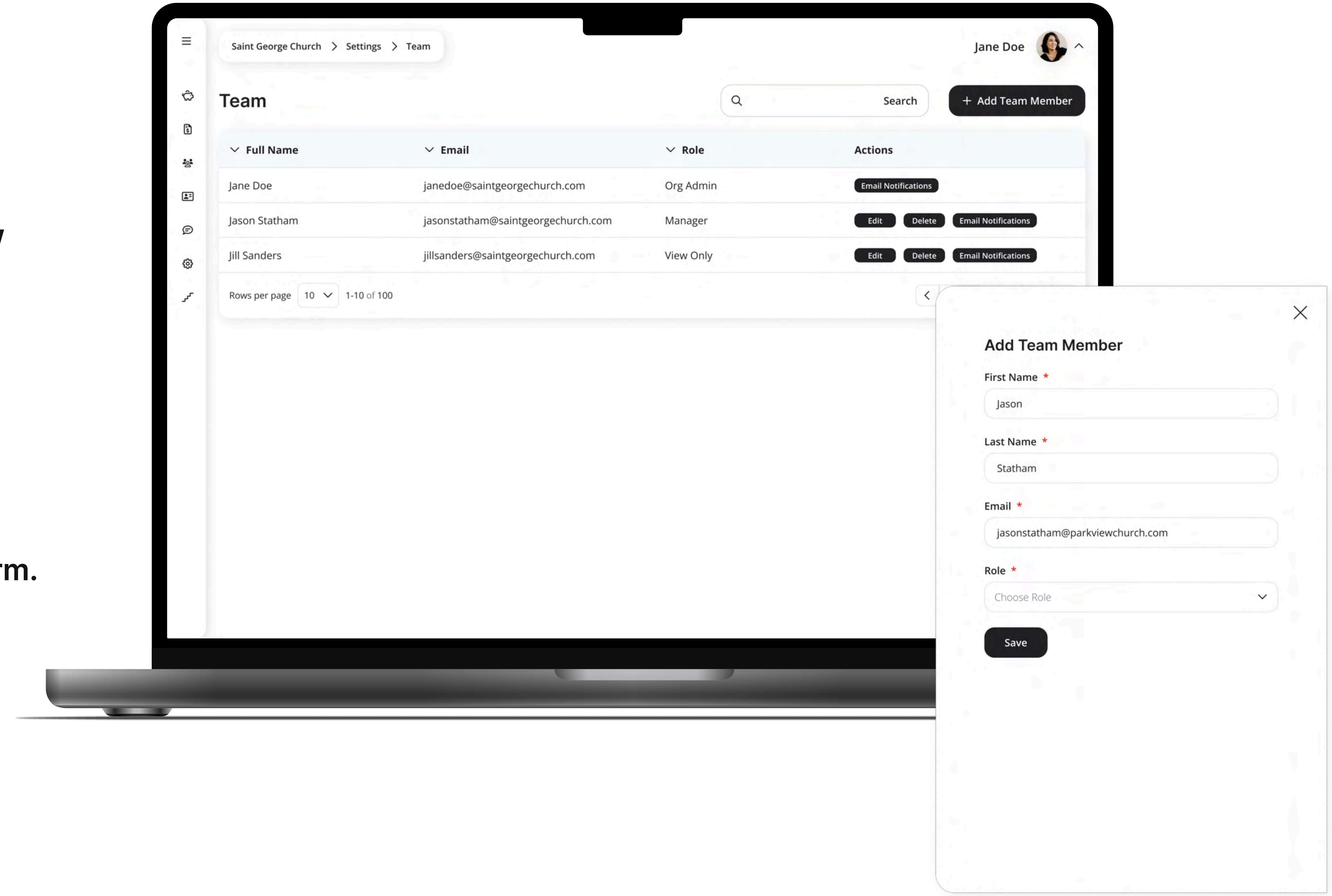
To add a new Team member, press on **+ Add Team Member**. Add the new Team member’s full name and email, and assign a role:

- Manager
- View Only

Managers can access all of the actions available on the Giving platform, including adding and deleting Campaigns, manage Donations, Team members etc.

View Only role allows users to view all information on the platform. They will not be able to add, delete, or modify any data.

The Org Admin is a manager that cannot be edited or deleted by other managers and will be the billing point of contact.



Settings: Branding

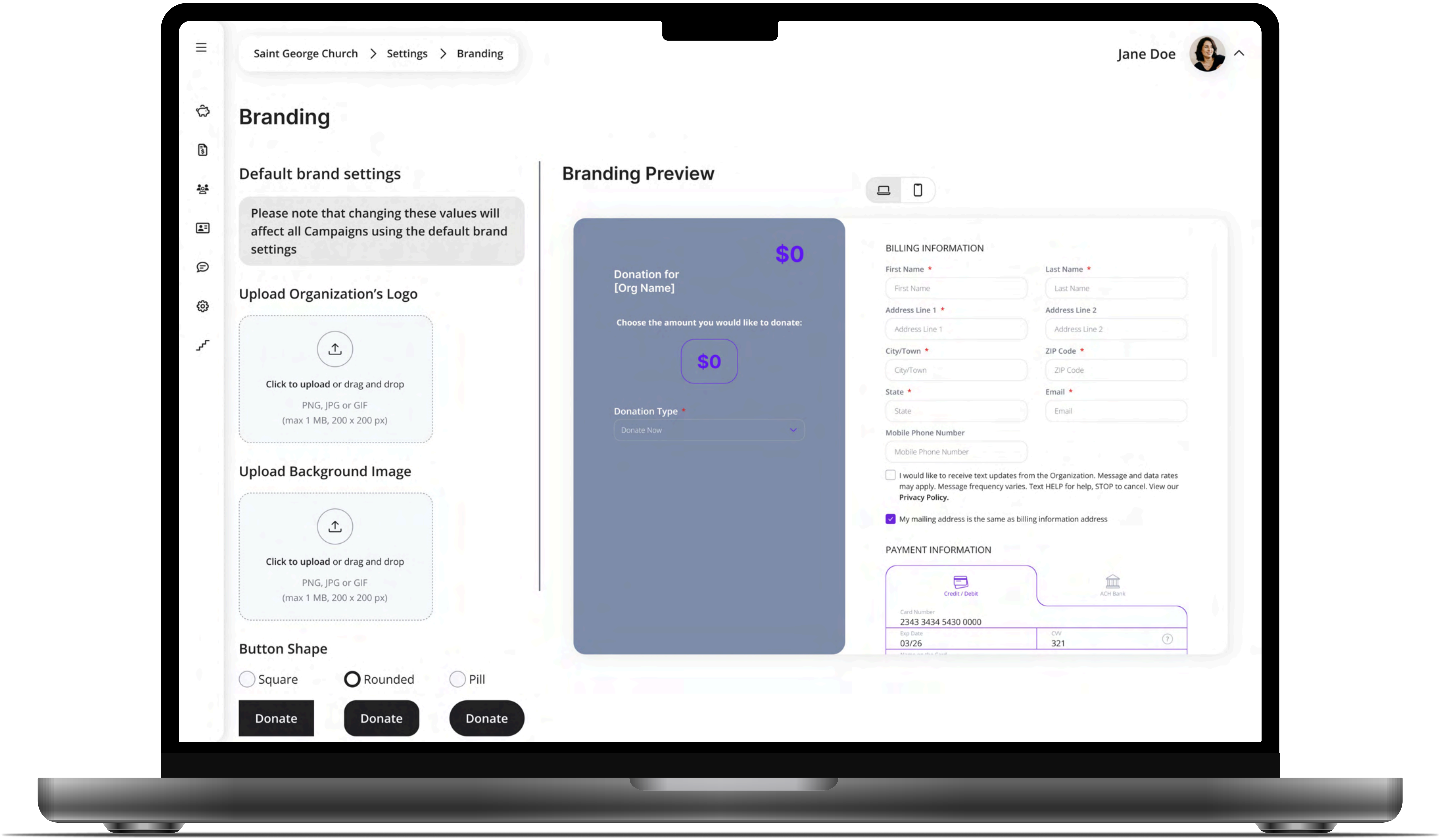
Define your Organization's identity with customizable branding options, including logo, colors and Campaign embeddable assets. The branding settings will apply to all Campaigns that use default settings.

Individual Campaigns can have unique branding by clicking on “Customize Your Campaign” page within a specific Campaign.

Branding Preview

By default, the preview colors of the Campaign page are gray and purple, as you see them on the mockup. Changing the logo, background image and other settings you will see changes on the Campaign preview.

Switch between web and mobile view of the Campaign page to see changes in real time for different devices.

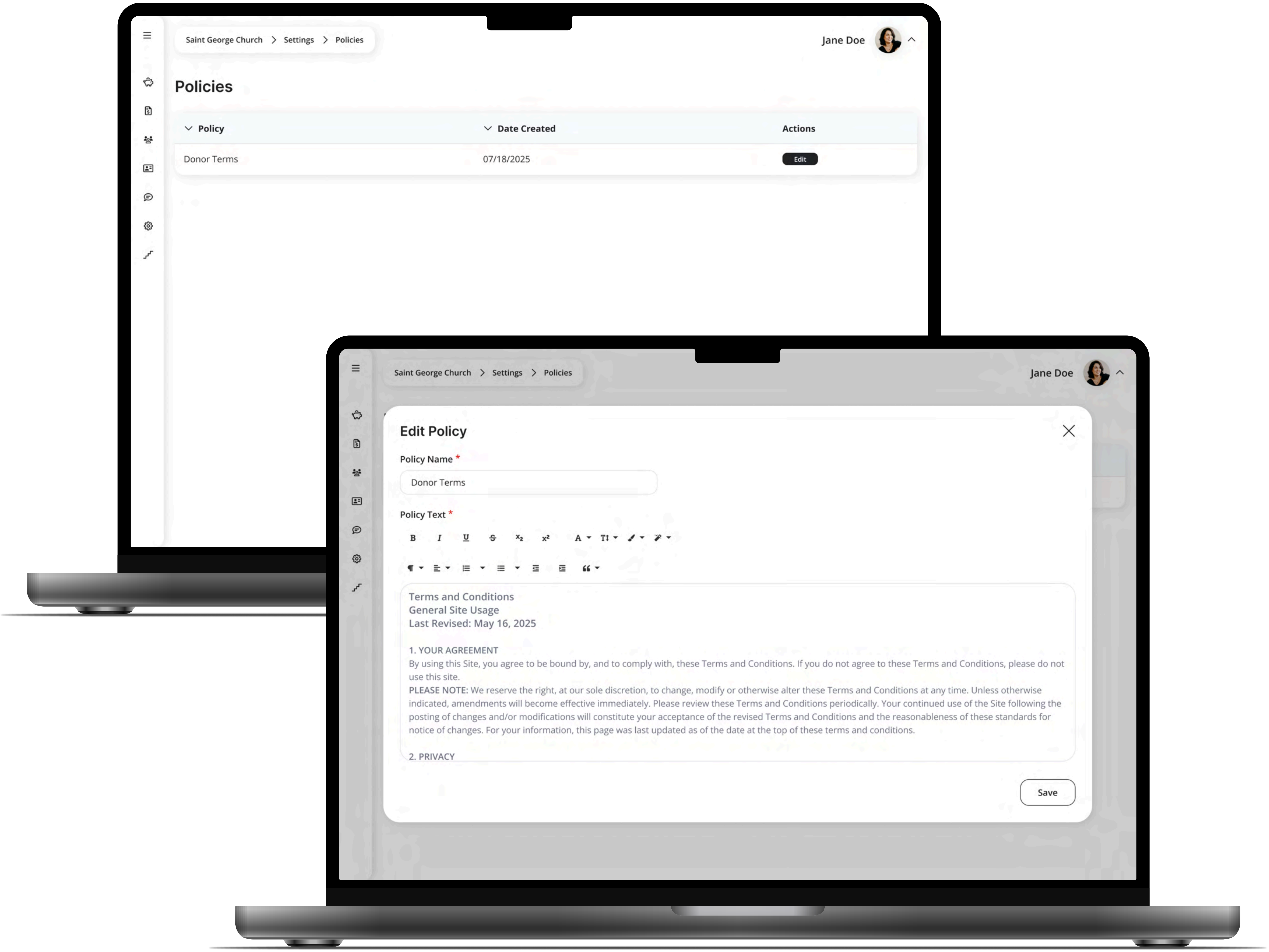


Settings: Policies

Edit your Campaign Policies using the text editor.

By default, there is one policy “Donor Terms” that your donors will see on the Campaign page, if you turn on the toggle “Show Policies” on the Customize Your Campaign Payments tab. Enabling a Policy on the Customize Your Campaign page will make it visible to the Donor and require them to check an acceptance box prior to completing a donation.

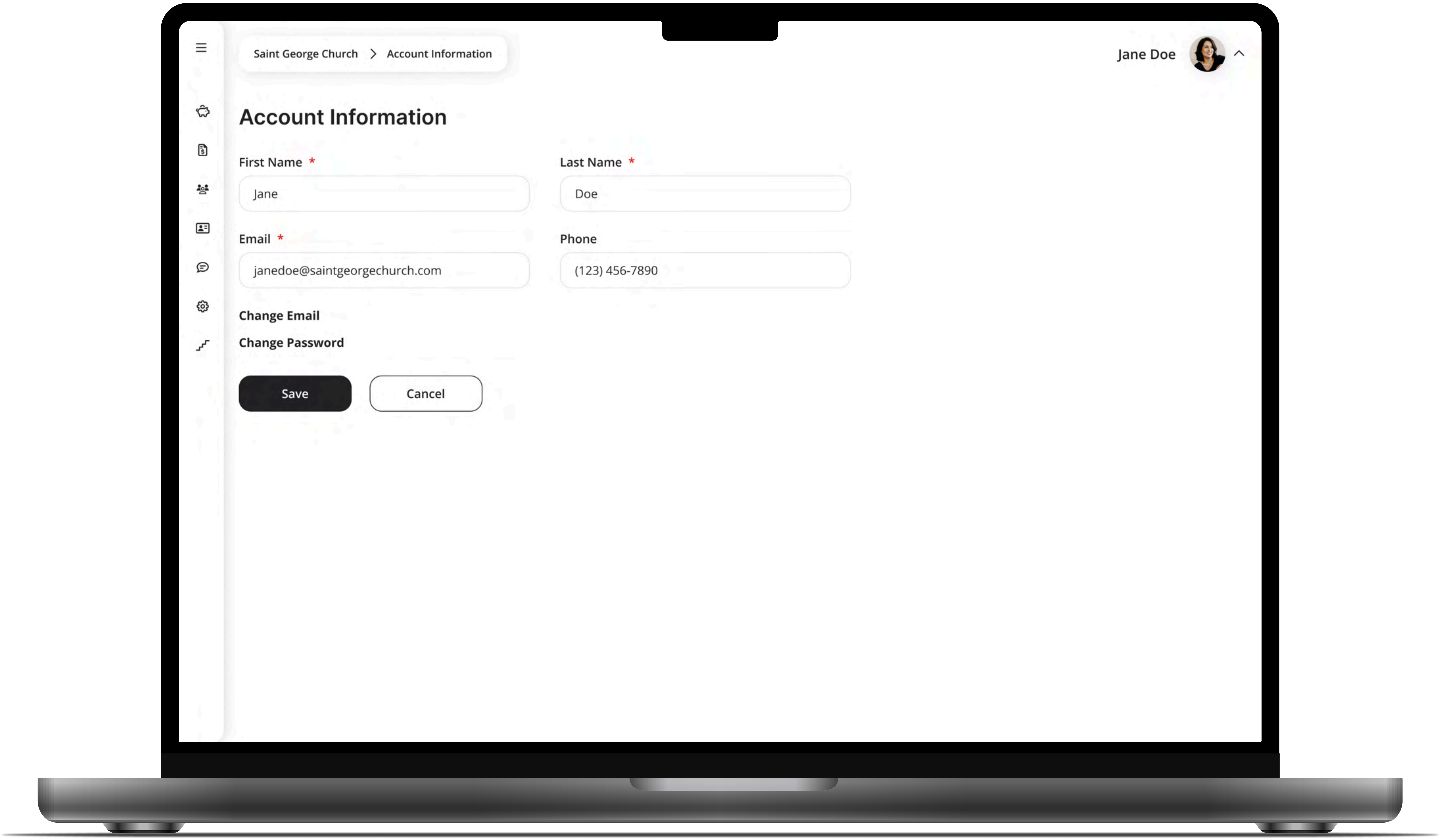
On the Policies page, you may see the policy name, date created (the same day the Organization was created) and Edit button. Open the Edit window and edit the policy name and text using a simple text editor. Save the changes for them to become effective.



Account Information

This page allows users to manage the name, password, and contact information tied to their user profile.

To change the Email or Password, click on the corresponding buttons on the page and fill out the required fields.



Disclaimer:

The Quick Start Guide to the Giving Platform aims to help users navigate its features and benefits.

Note that some features may be changed, updated or added as we continue to enhance the Fundraising Platform.

The current Quick Start Guide version was released on December 3, 2025.