

GiveSmart Fundraise Settings

Last Modified on 06/02/2022 4:36 pm PDT

Logging In To Your Account

Go to <https://www.givesmart.com> and click login (top right)

When you log into your account, you'll see your account at a glance:

- The first box shows total donations
- The second shows subscriptions including how many messages you have sent this month as well as the number of mobile subscribers that you have
- The third box shows six different helpful training videos on the GiveSmart Fundraise tools that are available to you.

Underneath, you will see your campaigns in the form of tiles. If you are new to GiveSmart Fundraise, you may only have a **New Campaign** tile to start creating your campaigns.

The screenshot shows the GiveSmart dashboard interface. At the top, there are two tabs: 'Campaigns' (selected) and 'Keywords'. To the right of the tabs are three buttons: 'Sort' with a dropdown arrow, 'Send Message' with a dropdown arrow, and 'New Activity'. Below the tabs, there are two campaign tiles. The left tile is titled 'Sandbox 2017' and features a progress bar. The progress bar shows 'RAISED \$0' on the left and 'COLLECTIVE GOAL \$140,000' on the right. Below the progress bar, there are two statistics: '0 GIFTS' and '\$0 AVG. GIFTS'. The right tile is a dashed box containing a plus sign and the text 'New Campaign'.

Changing Your Password

Click on your name in the top right of your dashboard and click **Profile**.

The screenshot shows a user profile dropdown menu. It features a blue header with a question mark icon, an orange square with the letter 'S', and the text 'Scott Couchman' followed by 'MobileCause Academy (Training)' with a dropdown arrow. Below the header, there is a 'REPORTING' option with a dropdown arrow.

Enter your current password and a new one twice.

Current Password Password Confirm Password

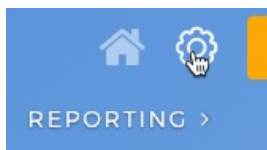
Enable Email Notification for Failed Recurring Donation

API Token Key: To manage your API Token Key please visit the Developer Portal

[Update](#)

Adding Users to Your Account

Click Settings (the Gear icon) in the upper right hand corner of your dashboard.



Then click the New User button.

Settings

Users [+ Add User](#) [Security Settings](#)

Fundraisers

Organization

Receipts and Notifications

Year-End Consolidated Receipts

Remittance

Name	Email	User Name	Mobile Number	Verification	Admin	Finance	Actions
Scott Couchman	scouchman+demo@mobilecause.com	scottcouchman	(626) 512-9046	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Delete
Ford Prefect	scouchman+demo2@mobilecause.com	fordprefect					Edit Delete
Arthur Dent	scouchman+demo42@mobilecause.com	arthurdent				<input checked="" type="checkbox"/>	Edit Delete

There are two permission levels for Users:

- Admin Users can make changes to the User Administration section or make changes in the Settings in your GiveSmart Fundraise Account.
- Non-admin Users can make changes to your online forms and export reports.

If someone needs the ability to create more users, be sure to make them an Admin.

Verifying Remittance Information on Your Account

Click Settings in the top right of your Dashboard. Click on Remittance on the left hand menu. Confirm that the correct address is listed, as any funds raised prior to your Merchant Account being set up will arrive via check to this address.

Users

Fundraisers

Organization

Receipt Configuration

Remittance

Billing

Payment Methods

Order History

Organization Logo

Shared Settings

Remittance

This is the person in your organization to whom MobileCause will send checks for monies raised.

First Name

Last Name

Email

Address

City

State

Zip

Phone Number

Save

Note: once your Merchant Account is set up, there will be no need to receive paper checks from GiveSmart Fundraise.

Choosing Your Organization Short Name

Click Settings, then Organization. Create a recognizable Short Name that your donors will recognize that fits within the 15-character limit. Your Organization Short Name will appear in text messages to your donors and as a hashtag if they tweet about you after they donate.



Settings

Users

Fundraisers

Organization

Receipts and Notifications

Remittance

Billing

Integrations

Order History

Organization Logo

Shared Settings

QR Codes

Organization

Organization Name

MobileCause Academy (Training)

Short name

MCAcademy

EIN

00-0000000

Info Email

scouchman@mobilecause.com

Website URL

https://support.mobilecause.com

Sector

Select your sector

Privacy and Terms Link

https://www.mobilecause.com/privacy/#

Donor Support Number

1 (888) 661-8804

Save

Organization Logo

Click on Organization Logo on the left hand menu. Click File to upload an image from your computer or URL to upload an image using a link to that image. Select the image you wish to upload by clicking Choose Logo. Upload a .JPG or .PNG file that has an aspect ratio of 80:27 (for example, 400 x 135 pixels or 800 x 270 pixels)

This logo will show on tax receipts that are emailed to your donor after they complete a donation and on the Thank You page after your donor completes their donation.

Settings

Users

Fundraisers

Organization

Receipts and Notifications

Remittance

Billing

Analytics

Payment Methods

Email Processors

Order History

Organization Logo

Shared Settings

QR Codes

Organization Logo

File URL

 Choose Logo



Configuring Your Tax Receipt

Click on Receipt Configuration from the left hand menu to customize the Thank You Message on your email tax receipts. You can also customize the sender email by adding a contact email.

Users

Fundraisers

Organization

Receipts and Notifications

Remittance

Billing

Analytics

Payment Methods

Email Processors

Order History

Organization Logo

Shared Settings

QR Codes

Receipts & Notifications

Configure the default receipt and notifications settings that will be used when you create a new form

Receipts

Receipt Message

Thank you for your support to MobileCause Academy (Training)

Contact Email

scouchman@mobilecause.com

Emails will send from this address

Email Subject Line

Thank you for your support

Your preferred subject line for the donation receipt email

Contact Phone

818-495-4531

Don't want to receive calls? Don't add your phone number!

Include Tax Info

Donors can claim tax deduction with an IRS compliant receipt.

Show

Compliance Message

No goods or services were received in return for this gift. MobileCause Academy (Training) is a 501(c)(3) charity.

[Preview PDF Attachment](#)

Notifications

Save

Setting Up Your Merchant Account:

1. Complete all fields on the [application form](#).
2. Send an image of a voided check or a bank letter to merchantaccounts@mobilecause.com (this will be uploaded to the merchant account provider along with the completed form).
3. Complete the digital signature form (this will be sent to the email address listed as the contact on the application form).

To order your credit card swiper, please [contact Support](#).

The review process will take 2-3 business days from the time of submission. As soon as the application is approved, the merchant account will be activated and linked with your GiveSmart Fundraise account.

You will receive an automated email with your merchant ID and a link to create a login for the merchant center portal.

4. Confirm your account by clicking the link, creating your user login, and logging in to the merchant center. [Click here to setup merchant account](#)
