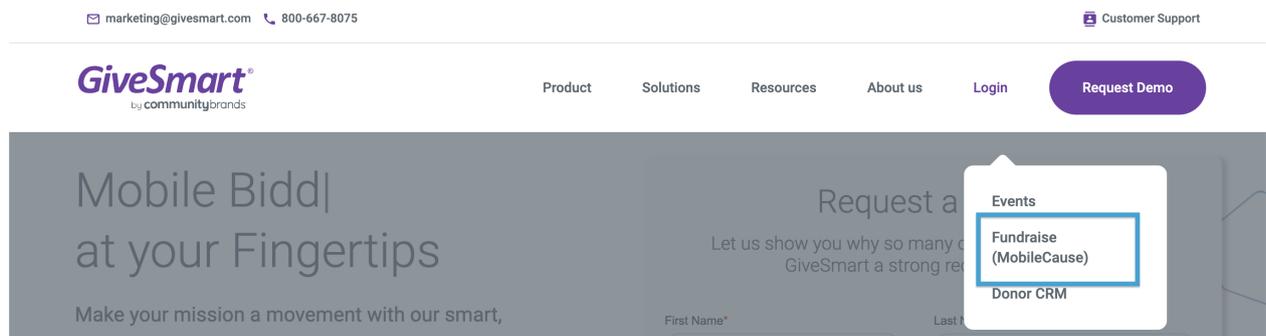


GiveSmart Fundraise Settings

Last Modified on 09/28/2023 11:44 am PDT

Logging In To Your Account

Go to <https://www.givesmart.com> and click login (top right). You can also login by going directly to fundraise.givesmart.com.



User Email: XXX@XXXX.XXX

Password: changeme

Dashboard Overview

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

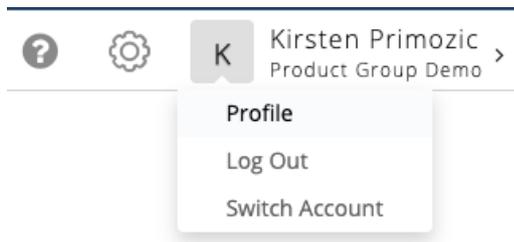
- The first box shows total donations
- The second shows subscriptions including how many messages you have sent this month as well as the number of mobile subscribers that you have

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 dashboard overview. 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 is a grid of campaign tiles. The first tile is titled 'Sandbox 2017' and features a progress bar. Below the progress bar, it shows 'RAISED \$0' and 'COLLECTIVE GOAL \$140,000'. At the bottom of the tile, it displays '0 GIFTS' and '\$0 AVG. GIFTS'. To the right of the 'Sandbox 2017' 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**.



Enter your current password and a new one twice.

A screenshot of the password change form. It features three input fields: 'Current Password', 'Password', and 'Confirm Password'. Below the fields is a checkbox labeled 'Enable Email Notification for Failed Recurring Donation' which is checked. A blue link labeled 'API Token Key' points to a 'Developer Portal' for managing API keys. At the bottom left is a dark blue 'Update' button.

Adding Users to Your Account

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



Then click **+ Add User**.

A screenshot of the 'Settings' page. The 'Settings' title is in large blue font with a gear icon. Below it, there are tabs for 'Users' (selected) and 'Security Settings'. A '+ Add User' button is visible. On the left, there is a sidebar menu with items: Fundraisers, Organization, Receipts and Notifications, Year-End Consolidated Receipts, and Remittance. The main content area shows a table of users.

Name	Email	User Name	Mobile Number	Verification	Admin	Finance	Actions
Scott Couchman	scouchman+demo@mobilecause.com	scottcouchman	(626) 512-9046	✓	✓	✓	
Ford Prefect	scouchman+demo2@mobilecause.com	fordprefect					
Arthur Dent	scouchman+demo42@mobilecause.com	arthurdent				✓	

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.
 - For GiveSmart customers who own 2 or more GiveSmart modules, you have the option to create admin who can utilize our **Single Sign-On** feature allowing your admin to have 1 username and password for all GiveSmart modules.
- 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.

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

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

Year-End Consolidated Receipts

Remittance

Billing

Integrations

Order History

Shared Settings

QR Codes

Organization

Organization Name

GiveSmart Fundraise Academy (Training)

Short name

GSFAcademy

EIN

00-0000000

Info Email

scott.couchman+demo@communitybrands.com

Website URL

https://support.givesmart.com

Sector

Agency

Privacy and Terms Link

https://www.givesmart.com/legal/

Donor Support Number

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)

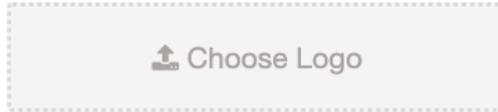
This logo will show on tax receipts that are emailed to your donor after they complete a donation and on the Thank You page after your donor completes their donation.

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



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.

Receipts & Notifications

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

Receipts

Receipt Message

Contact Email

Email entered is shown on all receipts and notifications for donors with inquiries. Emails will send from this address

Email Subject Line

Your preferred subject line for the donation receipt email

Contact Phone

Phone entered is shown on all receipts and notifications for donors with inquiries.

Include Tax Info Show

Donors can claim tax deduction with an IRS compliant receipt.

Compliance Message

Preview PDF Attachment

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).

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.
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