

Shared Settings Account Settings

Last Modified on 06/02/2022 9:55 am PDT

Shared Settings, accessed from the Settings menu, allows you to set up default colors and images for use across your forms. You can always customize each form on its own, but Shared Settings gives you that initial standardization for your brand. You can also enable the option for donors to be charged the processing fee for their donations.

Go to **Settings** (the Gear icon) on the right top side of the navigation menu.



Note: Only Administrators have access to the Settings area. If you do not see the Settings icon, you are not an administrator. If you need access to the Settings area, contact the person who created your login to GiveSmart Fundraise to change your level.

Click on **Shared Settings** on the left side. Then select the appropriate section to make changes.

Settings

Users

Fundraisers

Organization

Receipts and Notifications

Remittance

Billing

Integrations

Order History

Organization Logo

Shared Settings

Shared Settings

These are the default settings for your pages. Changes here will be reflected on new forms, event pages, and crowdfunding pages.

Account

Forms

Text Messages

Social Media

Additional Settings

Account


The Account section provides a template for the default look of your forms. By providing details here, your activities will immediately start with a design that matches your organization so you can start using them almost immediately without much further work.

Account


Brand Color

Brand Logo

 Upload New

Background Image

 Upload New

Brand Color: This will be the color of the various elements on your form, from the buttons to the outlines, the larger style or header text and more, depending on the activity you are designing. You can enter your organization's color either by the exact hex code of the color (recommended) or using the color square to use the circle and square to add the color.

Brand Logo: You will want to upload your standard organization logo here, by clicking on Upload Here. This logo will appear at the top of all of your forms by default.

We recommend that your logo dimensions are 500 x 85 pixels for the best formatting. For more information about image sizes and requirements, [click here](#).

Background Image: This is a picture that should represent your organization. It will not appear on the mobile version of the forms, because the mobile version has the form filling the entire screen. The background image will appear on the Desktop, Tablet and Embedded versions of the form. The full page version (desktop) will show the entire image where the Tablet and Embedded versions will show only part of it.

We recommend that the background image is 1920 x 1080 pixels for the best formatting.

Forms

Forms

Charge Processing Fee

Hide

Processing Fee Text

I would like to cover the payment processing fee.

To show the fee percentage use **[percent]**

Processing Fee Percentage

2.5

%

Processing Fee Default Opt-In



Max Recurring Payments Allowed

12

Callback URL on form submission

Callback Response Format

JSON

The Forms section sets some of the more technical components to your activities. If nothing else, enter your processing fee percentage that is in your contract with GiveSmart Fundraise in the percentage field in this section.

Charge Processing Fee: You can enable to show the option for your donors to add the credit card processing fee to their donation so you keep more of the donation. By enabling it here, any new forms will start with the processing fee option enabled.

We have found that between 70% and 80% of your supporters are willing to pay the processing fee with their donation, so it is a great feature to include on your forms.

Processing Fee Text: This is what will be displayed on the form to ask your supporters if they want to help with the fees. The default wording is "I would like to cover the payment processing fee." but you can change the wording to fit your organization's style and needs.

If you wish to include the actual percentage being charged in this text, you can use the variable `[percent]` to show the number set in the processing fee percentage below.

Processing Fee Percentage: You will want to enter the actual processing fee percentage as defined in your GiveSmart Fundraise contract. It will default to 2.5% if you do not enter a number.

We highly recommend entering your processing fee percentage here. While you can change it when you design your activities, by entering the correct percentage here means you don't have to remember the percentage when designing your activities.

Processing Fee Default Opt-In: This will determine if the box is checked on the forms - meaning whether your supporters start off including the processing fee or not. If it is checked here, it will start checked on the forms.

Your supporters always have control and the final say on whether they pay the processing fee or not. This checkbox simply sets whether they come to the form paying the fees or not.

Max Recurring Payments Allowed: When you set your [Recurring Donation](#) options to a Fixed Term or Pay Over Time, you can set the donor's to choose anywhere from 2 to 60 payments. The number you set here will become the default selected on the form design.

Callback URL on form submission: This allows you to set [Webhooks](#) on your forms. Webhooks have quickly become the most desired method of integrations due to their instantaneous and adaptable nature.

GiveSmart Fundraise will, on any forms assigned, POST all fields related to the form to the secure endpoint of your choosing in the familiar and preferred JSON format. This includes all standard fields as well as custom fields. For more information, [review Webhooks here](#).

Callback Response Format: You have the choice of JSON format or Form Data format for your [Webhooks](#). JSON is usually the preferred method.

Text Messages

Text Messages

First Name Default Text

The text that will appear if the contact's first name is missing when sending a personalized text message

Last Name Default Text

The text that will appear if the contact's last name is missing when sending a personalized text message

When you have the [Enhanced Text Messaging](#) component enabled on our account (part of the Advanced Plan), you can include personalized text messages.

First Name Default Text: This is the text that will appear if the contact's first name is missing when sending a [personalized text message](#).

Last Name Default Text: This is the text that will appear if the contact's last name is missing when sending a [personalized text message](#).

Social Media

Social Media

Facebook Page

Twitter Page

Instagram Page

Youtube Page

Facebook / Twitter / Instagram / Youtube Page: Entering your various social media pages here will direct your supporters to your different platforms so they can follow your organization. These calls to action appear on the [Confirmation Page](#) and on the [Event Page's footer section](#).

Additional Settings

Additional Settings

Keyword Pagination Count

Jargon For Team

Keyword Pagination Count: When you browse through your keywords, whether on the dashboard screen or within one of the categories in the navigation menu, you can limit the number shown on a single page to help with page loading. We recommend leaving this at the default of 30 keywords per page.

Jargon For Team: in Crowdfunding and Peer-to-Peer Fundraising activities, volunteer fundraisers can join "Teams." The term Team is used in several places, but it may not be the correct term for your organization. You may use something like coaches, initiatives, departments, etc. By changing the term here, it will change it in the different places within the Crowdfunding and Peer-to-Peer Fundraising activity where it may appear.
