In-App Messaging for Crowdfunding and Peer-to-Peer Fundraising

Often in your Crowdfunding and Peer-to-Peer Fundraising campaigns, you want to communicate with your fundraisers/ambassadors, or the teams. Let them know the campaign is about to start, inform them who is in the lead, and check in with them to make sure they have what they need to succeed. Maybe you need something from a Team Captain, and with In-App messaging, they can respond to you through the application.

With In-App messaging, both you and your volunteers can chat through the GiveSmart Fundraise interface.
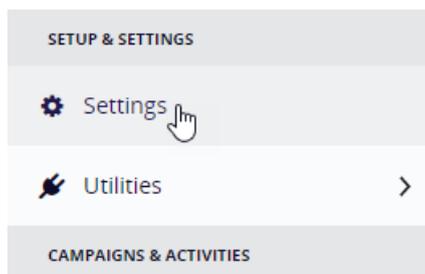

> **Note**: This feature only works with Crowdfunding and Peer-to-Peer Fundraising campaigns.

Enabling In-App messaging

To start using In-App messaging, you need to enable the feature first.

1. Go to **Setup & Settings** > **Settings**

2. Select the **Shared Settings** category
3. At the bottom of the Account section, click on the switch to show **In-App Messages**.

Account

Brand Color

#0088cc

Brand Logo

⬆ Upload New

Use default settings

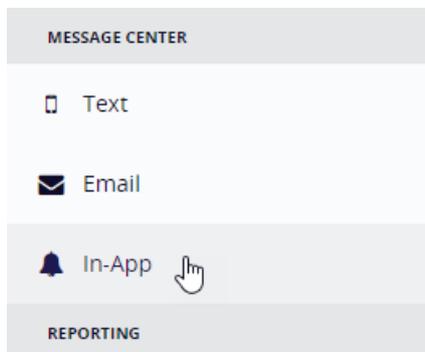nprofi

1._Org_Logo.png

Background Image

⬆ Upload New

In-App Messages   Show 🟢

Use default settings

Accessing the In-App Messages as the organization

With the In-App Messages enabled, when you go into the **Message Center** category, you will have an extra option for **In-App**. Click on **In-App**.

MESSAGE CENTER

📱 Text

✉ Email

🔔 In-App

REPORTING

If this is the first time you have been in the In-App messages, you will be in your Inbox, but it will show that there are no messages available.

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| Inbox | Outbox | ⟳ ⚙ | Create Message |

No messages available
Once you receive a message it will be viewable here

From here you have:

- **Inbox**: View messages sent to you.
- **Outbox**: View messages you have sent
- **Refresh** (the arrows in a circle): Refresh to update the status of messages and see if anything new has appeared.
- **Settings**: (the gear icon)Determines how you want to receive alerts to messages.

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| Inbox | Outbox | ⟳ ⚙ |

Receive Alerts:

🟢 Email

🟢 SMS

- **Create Message**: Prep a message to send.

Creating a message as the organization

To send a message, while in the In-App section of the Message Center, click on**Create Message**.
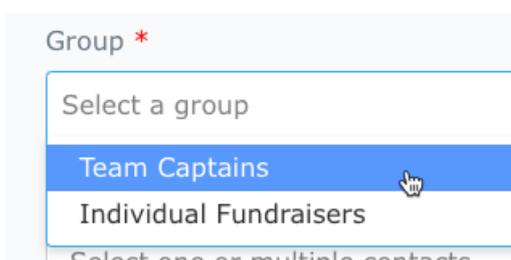
You will need to fill in all the pieces:

- **Campaign**: Only campaigns with active Crowdfunding and Peer-to-Peer Fundraising will be visible when you click on the drop-down menu.
- **Keyword**: Only valid Crowdfunding and Peer-to-Peer Fundraising keywords **with fundraisers already in the activity** will appear in the drop-down menu.
- **Group**: As the organization, you have the option of contacting the Team Captains or the Individual Fundraisers.

- **Contacts**: Contacts are now filtered by the group selected, and you can select one or many for your message.
- **Subject**: Like an email, provide a subject line for your message.
- **Add a message**: Write your message here. It does allow for some Rich Text editing, so you can have different sizes of text, bold, italic, underline, change the color of the text, and add bulleted or numbered lists.

  The *Insert Placeholder* option allows you to perform a mail merge to personalize each message with the person's first name or last name, and have a shortcut to put in the organization name.

Click **Send Message** when you are ready to send.

You will be able to see your message in the **Outbox** section.

Messages, both in the Inbox and the Outbox, that have not been read will be indicated by a dot to the left of the title of the message.

Message Alerts

Whether it is the organization or a fundraiser sending a message, the recipient will receive message alerts through email and texting by default.

Note: the In-App messaging does NOT send the actual messages through email or texting, it will simply send an alert that you have a message. The In-App messages are only available (as the name of the feature implies) within the application itself.

The email looks like this:

GiveSmart Fundraise Academy (Training) just messaged you

G GiveSmart Fundraise Academy via GiveSmart Fundraise
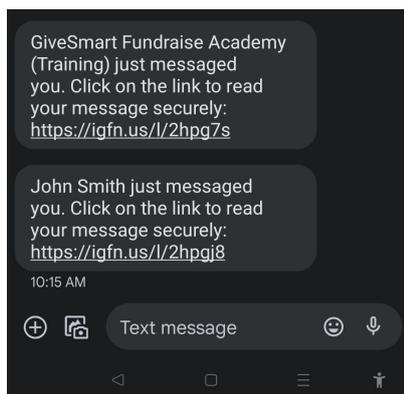   To: ○ Scott Couchman

Tue 2/28/2023 10:11 AM

Click **here** to go to your notification center and read your message securely.
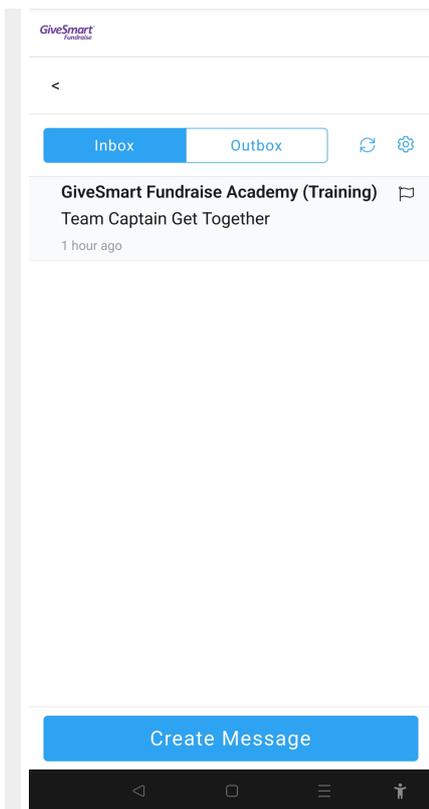
POWERED BY

GiveSmart
Fundraise

Click the link ("Click **here** to...") to open the application and read the message.

The text messages look something like this and come from the Crowdfunding and Peer-to-Peer Fundraising shortcode, 71777:

GiveSmart Fundraise Academy (Training) just messaged you. Click on the link to read your message securely: https://igfn.us/l/2hpg7s

John Smith just messaged you. Click on the link to read your message securely: https://igfn.us/l/2hpgj8

10:15 AM

Text message

Click the link to go to the In-App messaging.

If you access the In-App Messaging from a desktop display, it will look and act just like the organization view of the In-App center. The mobile view is very similar but fits a mobile display:

Message Alerts as the organization

When someone from your Crowdfunding and Peer-to-Peer Fundraising activity sends you as the organization a message, you will be alerted in different ways, such as the email and text message described above.

When you are in the application, you will also see a letter icon with a number by your name in the upper right of the screen:

You can click on the **Letter icon** to go directly to your In-App inbox, or you can go through **Message Center** > **In-App**.

Click on the message to read it.

Team Captain / Individual Fundraiser In-App View

If the volunteer accesses the link to the text or email, they will be sent directly to the In-App messaging view, which looks identical to the Organization's version.

Create Team Captain / Individual Fundraiser Messages

The only real difference between the Team Captain view, the Individual Fundraiser view, and the Organization view is when you create a message.

The Team Captain and Individual Fundraiser do not have the choice of Campaign and Keyword, and they have different choices for the Group.

The Team Captain can send messages to:

- The organization

- Their team members
- Their donors and the team donors.

The Individual Fundraiser only has the option to send to the Organization and their own donors (if they don't belong to a team) plus the team captain if they do belong to a team.

Direct In-App access for Team Captain / Individual Fundraiser

Where the organization can access the In-App messaging within the application, Team Captains and Individual Fundraisers have similar access; they do not have to wait for a message link to send messages. When they go into their page, as if they were making edits, there is a new tab called Inbox.

Click on the Inbox and it will take them into the In-App messaging interface.