Quick Start Guide

This welcome guide will walk you through the next steps and provide relevant resources to get your fundraising journey started.

Understanding the Guide

GiveSmart is comprised of 3 modules, GiveSmart **Fundraise**, **Events** and **Donor CRM**. It will help you on your training journey if you know which modules your organization has with your subscription.

What are the 3 GiveSmart modules?

- GiveSmart Fundraise
    - Online fundraising, text to donate, peer-to-peer fundraising, growth fundraising and more
- GiveSmart Events
    - Mobile bidding, silent auction, event management, ticketing & guest management, and more
- GiveSmart Donor CRM
    - Donor management

Where can I see which modules I have?

- In your welcome email it will list all modules that you have access to.

> **TIP**: If you have access to more than one GiveSmart module, once you are logged in, you can use the 9-dot in the top right corner of any module to easily navigate and switch to a different module.

Tour of GiveSmart Video

Get introduced to some of the features that GiveSmart has to offer, and see examples of how different fundraising types can expand your fundraising strategies.

In Fundraise explore:

- Peer to peer, navigating the module, sending text messages, donation forms, recurring giving, and text to give

In Events explore:

- Home page, virtual events, ticketing & seating management, checkin & checkout, auction, and event displays

In Donor CRM explore:

- Dashboard, contacts, thank you letters, add a gift, and filters & reports

> **TIP**: Click the dropdown arrow in the top left of the video, and scroll to find the section of interest to quickly jump ahead.

Logging In

Initial Login

As a new Admin, you will have received a welcome email with a personal link which provides you with your access to the GiveSmart platform. Before attempting to log in to GiveSmart, you will need to click the button or link in your email to complete your account setup.

> **IMPORTANT**: It is very important that this personal link be used to gain access to the GiveSmart platform upon your 1st entry. As this provides the way to both confirm the email address on file, which acts as your Username, as well as allows you to complete the setup of your new account.

Depending on if you are a single or multi-module owner on GiveSmart, your personal button in your welcome email may look a little different.

Multi-module admin

(with Global Admin single sign-on permission)

Change Password

GiveSmart Fundraise only admin

- Visit fundraise.givesmart.com and request a new password

GiveSmart Events only admin

Visit Admin Site

GiveSmart Donor CRM only admin

Join Kirsten P [Demo]

Please save your password as you will need to use this each time you login to GiveSmart.

Future logins

Once you have logged in for the 1st time to GiveSmart, you now have the credentials needed to login in the future. You will no longer use the link found in your welcome email.

For future logins you may access any of the GiveSmart modules by going to:

- GiveSmart Fundraise: fundraise.givesmart.com
- GiveSmart Events: e.givesmart.com
- GiveSmart Donor CRM: donorcrm.givesmart.com
- or you may simply go to givesmart.com and click 'login'

✉ marketing@givesmart.com   📞 800-667-8075   🖥 Customer Support

GiveSmart®
by communitybrands   Product   Solutions   Resources   About us   Login   **Request Demo**

Mobile Bidding
at your Fingertips   Request a   Events

                                                            Fundraise
Let us show you why so many o   (MobileCause)
                              GiveSmart a strong rec
Make your mission a movement with our smart,   Donor CRM
                                         First Name*   Last N

TIP: we recommend that you bookmark these links for ease of access in the future.

Adding Additional Admin

As an Admin you have the ability to create additional admin, however the type of admin role you have will limit what types of admin you can create, as you can only create admin who have the same or lower level of admin access than you have.

Types of admin

To view the different admin levels within each module, select the link below to review. Each module has different types of admin levels to select from.

- **GiveSmart Fundraise**
- **GiveSmart Events**
- **GiveSmart Donor CRM**

Create an admin

> Need additional Global Admin who have single sign-on access to all GiveSmart modules? Send a request to givesmart-help@communitybrands.com. Please include: First & Last Name, Email Address & Mobile Phone for the new admin.
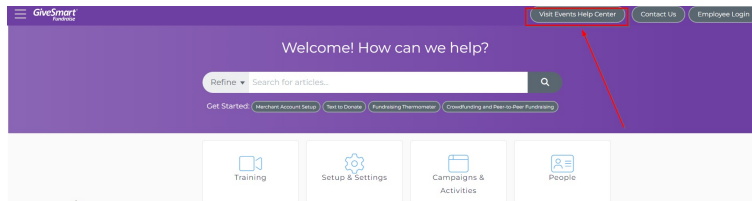
- **GiveSmart Fundraise**
    - Click the gear icon in the top right
    - Select +Add User
    - Enter: Email, First Name, Last Name, Mobile
    - Select User Role
    - Click Create User
        - Send the following instructions to the new admin:
            - Visit fundraise.givesmart.com and request a new password
- **GiveSmart Events**
    - From the left navigation select Users > Details
    - Click +New User
        - Enter: Name, Mobile, Email
        - Select User Role
        - Click Register User
            - A welcome email with a personal link to complete the activation of their admin account will be sent
- **GiveSmart Donor CRM**
    - From the dashboard, select Invite a Team Member
    - Enter: First Name, Last Name, Email
    - Click Admin User (optional, if new admin is authorized to add other team members)
    - Click Send invite
        - A welcome email with a personal link to complete the activation of their admin account will be sent

Help Center Access

We have a robust Help Center for each of our 3 GiveSmart modules that includes: technical guides, training videos, product updates and more!

- **GiveSmart Fundraise**
- **GiveSmart Events**
- **GiveSmart Donor CRM**

Easily navigate between the Help Center content by clicking the Visit Events Help Center or Visit Fundraise Knowledge Center buttons at the top.

The Donor CRM Help Center articles can be found on the GiveSmart Fundraise home page.
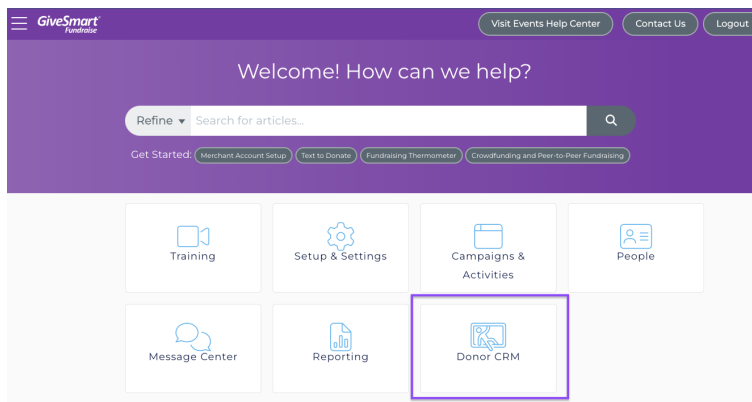
Merchant Center Processing & Batching Differences

	Events	Fundraise	Donor CRM
Batch Deposit Schedule	daily 8:45pm Central	daily 6:45pm Pacific	daily 6:45pm Pacific
Batch Delay Timeline (dependent on bank)	< 5 business days	24-48hrs	24-48hrs
Batch Label on Statement	MERCHANT BANK CD	MERCHANT BANKCD DEPOSIT 496.........	MERCHANT BANKCD DEPOSIT 496.........
Transaction Fees by Card	3.5% for DISC, VISA & MC 3.95% for AMEX	3.5% for DISC, VISA & MC 3.95% for AMEX	3.5% for DISC, VISA & MC 3.95% for AMEX
Fees Deducted from Account	deducted from each daily deposit	deducted once per month on the 2nd - 5th depending on weekends/holidays	deducted once per month on the 2nd - 5th depending on weekends/holidays

View Batch Reports in GiveSmart

GiveSmart Fundraise

- View a list of transactions within Fundraise by going to:
    - Existing Reporting > Search Transactions
    - Enter filter criteria, and click Search
    - The list of transactions can be downloaded to review
- To reconcile the credit card deposits with a batch deposit, this will have to be viewed in CardPointe. (*Access to CardPointe is granted to the signer of the GiveSmart contract, who can then add additional admin to the CardPointe account.*)
    - Once granted access to CardPointe, follow the steps **in this article** to reconcile the transactions with the batch date.

GiveSmart Events

- Credit card deposits can be viewed within the Events module by selecting:
    - Reports > Overview from the left navigation
    - Under Disbursements, select Batch Report to see a list of batch dates for this event
    - Click on a batch date to see the individual charges for this batch
- Click **here** to learn more

GiveSmart Donor CRM

- To reconcile the credit card deposits stemming from Donor CRM donation forms, this will have to be viewed in CardPointe. (*Access to CardPointe is granted to the signer of the GiveSmart contract, who can then add additional admin to the CardPointe account.*)

> **NOTE**: If the contract signer needs their CardPointe registration email resent, please reach out to our Support Team at givesmart-help@communitybrands.com.

Deciding Which GiveSmart Module to Use

GiveSmart has many amazing features to help support all your fundraising needs, but with so many options to choose from, you may be wondering where to go to best support your upcoming initiative. This diagram showcases the top features from each module, making it easy to understand where you should start your journey.