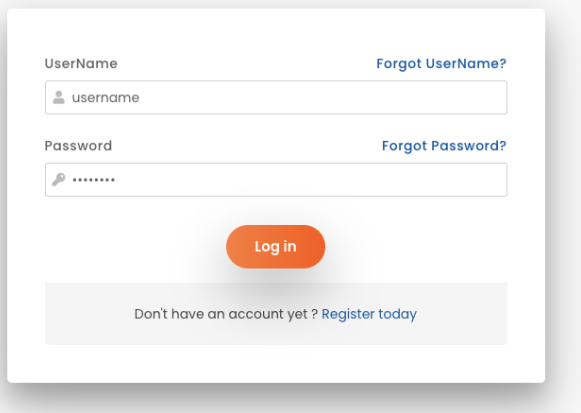
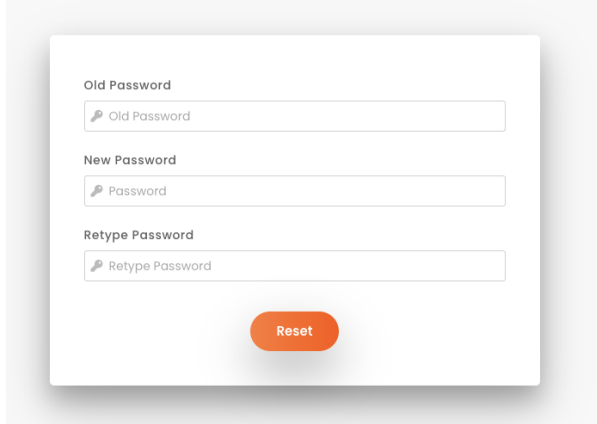


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ADDITIONAL RESOURCES

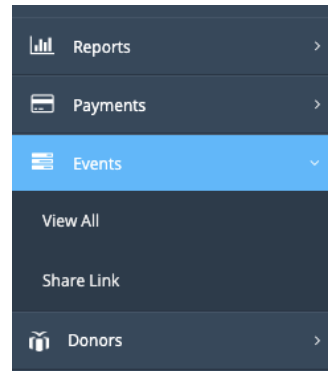
- [Video Tutorials](#) - Step by step walkthroughs of all information listed in this guide.
- Webinar Schedule: to sign up to attend one of our Giving Tuesday trainign webinars visit: https://docs.google.com/spreadsheets/d/1F5qP21Ns20lv7IWhBairKX6_ZEf7byOk/edit?usp=sharing&ouid=111720235579611828572&rtpof=true&sd=true

LOGGING IN	
<p>Navigate to https://www.givecentral.org/login</p> <p>Enter your username and temporary password listed in your Welcome Email.</p>	
<p>Upon logging in, you'll be prompted to change your password to something of your choosing.</p> <p>Enter your temporary password as the Old Password. Then type the password of your choosing in New Password and Retype Password. Click Reset.</p>	
<p>Once you've reset your password, you'll be able to login with your Username and New Password at https://www.givecentral.org/login.</p> <p>If you have forgotten your password or need further assistance with your temporary password, please check your welcome email for contact information.</p>	

EDITING YOUR PAGE







Your administrative user access is scoped, meaning you only have the ability to view and edit your organization's page. Consequently, other organizations will not have the ability to view or edit your organization's page either.

To edit your organization's page, navigate to Events > View All.

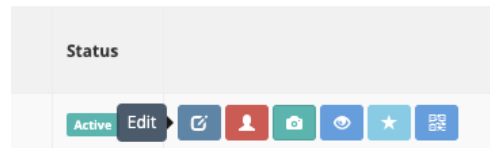


You will see your organization's page listed under Active Events with the following actions under the Status column:

- Blue Pencil: Edit Page
- Red Person: List of Donors to your Page
- Teal Camera: Edit Page Image
- Blue Eye: Preview Page
- Blue Star: Not Applicable
- Blue QR Code: Generate QR Code for Page

Event Title	Event Type	Start Date	End Date	Total to date	Status
Parish	Crowdfunding	2021-09-09	2031-09-30	\$0.00	Active      

Select the **Blue Pencil Icon** to Edit your location's page.

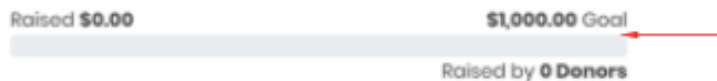


Event Details

Events	Event Updates	Details and Dates	Venue	Subscriber List	Texting Keyword	Select Event Image	Personalized Giving Page Options
Event Name : *	GiveCentral Test Sept 9				Event Type : *	Crowdfunding	
Organizer	Fr Bridget Daly				Organizer Email :	bridget@email.com	
GL Code :					Class :		
Database Ref. ID :					Goal Amount :*	1000.00	
Hide Progress Bar	<input type="checkbox"/>				Progress Tracker Label :	This is my goal!	
Make page visible but inactive	<input type="checkbox"/>				Hide Goal Amount	<input type="checkbox"/>	
Offer donors option to cover processing fee	<input checked="" type="checkbox"/>				Require donors to cover processing fee	<input type="checkbox"/>	

- **Event Name:** This will be the name of your organization. You can edit this, but make sure it includes the name of your organization so donors can easily find you!
- **Organizer/Organizer Email:** This is visible to donors, and can be edited if necessary
- **Goal Amount:** This will be your goal for how much you want to raise! It's currently set at \$1,000, but can be edited to any number you want.
- **Hide Progress Bar** (optional): This will hide the progress bar (thermometer) on the donor-facing page

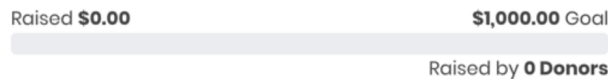
Thank you!



- Example:

- **Progress Tracker Label** (optional): If you hide the progress bar, then this will not appear, but you can put a short amount of text above the progress bar

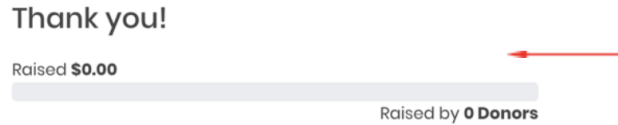
Thank you! ←



- Example:

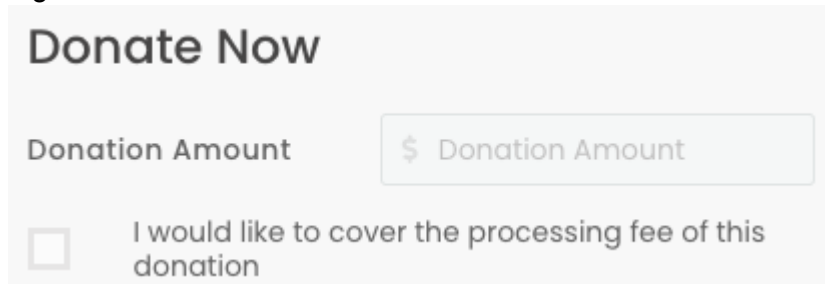
- **Make Page Visible but Inactive** (optional): This will allow you to post your page but not have donors make gifts until you are ready – this can be unchecked whenever you are ready to start accepting gifts – otherwise it will be unchecked for you on November 30, 2021 (Giving Tuesday)

- **Hide Goal Amount** (optional): If you want to show the progress tracker bar, but hide the goal amount, select this option.



- Example:

- **Offer donors option to cover processing fee:** Provides the donor a checkbox option to cover the processing fees associated with the transaction.



- Example:

- **Require donors to cover processing fee:** Automatically adds processing fees to the donor's total upon checkout. No checkbox is added to your organization page.

Platform : Web Only Mobile Only All

Event Status : Active Suspended Invisible Hidden

Event Description :

Thank you for your support!

body

Event Form Label :

Categories :

- Choose:
- Ministry
- School
- Parish

Crowdfunding Button Label :

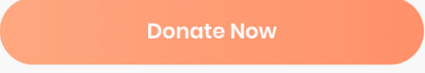
Make it a featured event

Send email to donors when their schedules are about to end

Send email to administrators every time a payment is made to this event.

Enter Email addresses to receive mail :

- **Platform:** Keep this as 'All'
- **Event Status:** Keep this as 'Active'
- **Event Description:** You can edit this however you would like – changing text size, adding images, links, etc.
- **Categories:** Please leave this section as is
- **Crowdfunding Button Label:** This can be edited as you would like, from the default message, 'Donate Now'

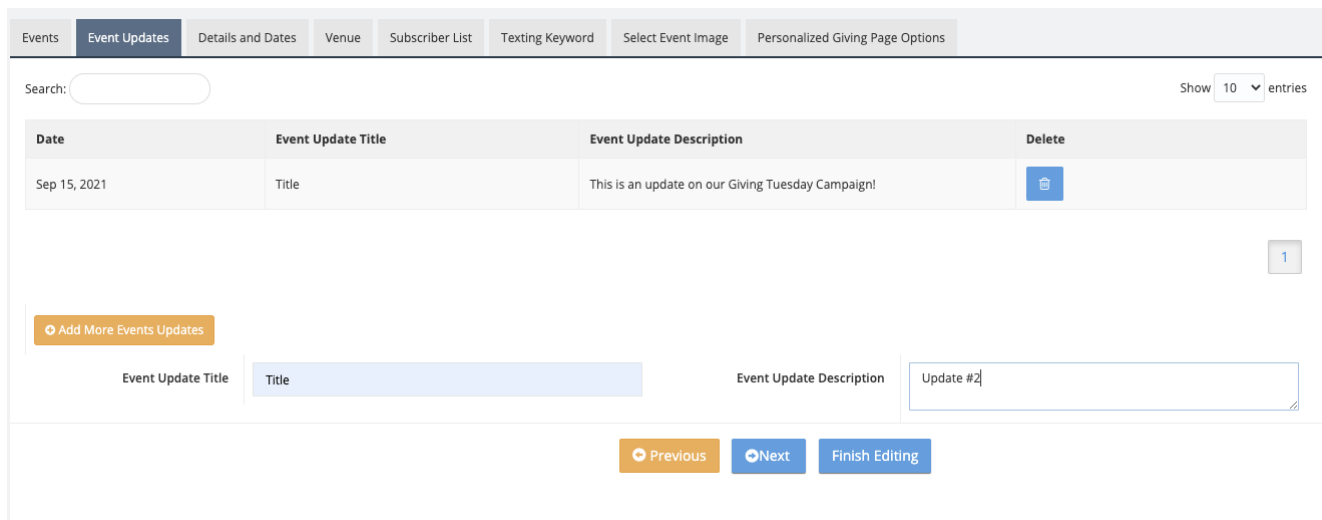


- Example:
- **Send email to administrators every time a payment is made to this event:** If you want to receive copies of the receipts when a donor makes a gift, you can put your email address here. Multiple email addresses can be added with a comma separation.

Event Updates

Change your first description with updates so your donors and community members know what you're doing with the money, how much you've raised, fun stories about your community, and other ways to get your donors engaged!

To add an update, enter a title in the Event Update Title field and write or paste your update into the Event Update Description field. Click Finish Editing. Your update will now reflect on your page under the Updates tab for donors to read.



Details and Dates

Do not change this tab! This is how the donations deposit and is important to keep as is!

Venue

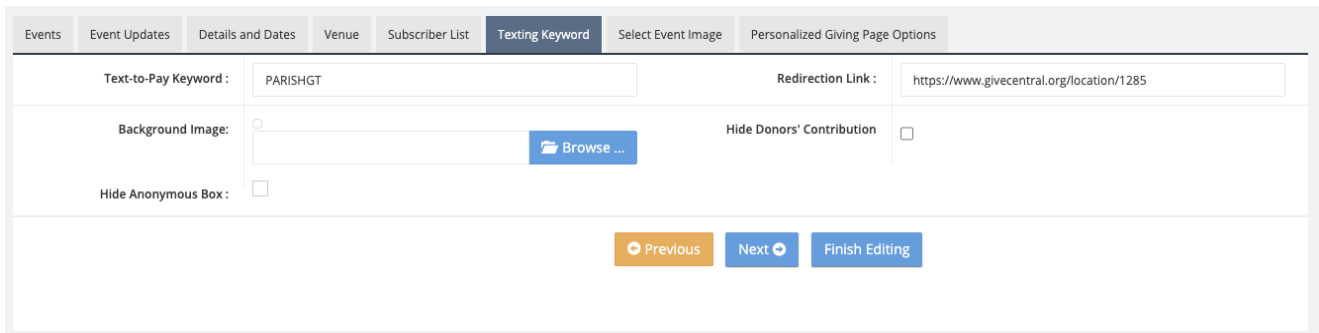
Not applicable to the crowdfunding page and will not be visible to donors.

Subscriber List

This will show any donors or community members who have subscribed to updates from your organization. They can subscribe to receive updates directly on your crowdfunding page.

Texting Keyword

- **Text-to-Pay Keyword:** Your Text-to-Pay Keyword can be updated, but will need to follow the below criteria:
 - Minimum of 5, maximum of 10 characters (alpha-numeric only)
 - No spaces
 - Unique across all GiveCentral organizations (i.e. there cannot be more than one Joseph)
- **Redirection Link:** Please leave the 'Redirection Link' as is – donors will be directed back to the foundation/diocesan leaderboard after making a gift.
- **Background Image:** Will show up on the donor's mobile text to give page. We recommend not making any change here, but if you do, choose an image that is not too busy or has words on it, as it will be hard to view on mobile.
- **Hide Donors Contribution:** You will be able to see the donor's name, not the dollar amount on the donor facing page. As an administrator, you will be able to see the dollar amount in reporting. We recommend not checking this box for this project. (Exclusively for gifts made via text-to-give.)
- **Hide Anonymous Box:** Removes the option for 'anonymous' gifts. (Exclusively for gifts made via text-to-give.)



Select Event Image

Select Event Image: We've set you up with an image, but you are welcome, and encouraged, to change it to something more personalized to your organization!

If you want to change the image:

- Make sure you know where the image is saved on your computer
- Formats: .jpg or .png
- Size: 500px by 500px

Select the blue **Browse** to upload an image file. When you've uploaded your image, you can click and drag the image around to get the best crop, as well as using the plus and minus icons to resize the image within the crop.

When you are satisfied with your image crop, click the orange **Crop & Upload** to submit the image.

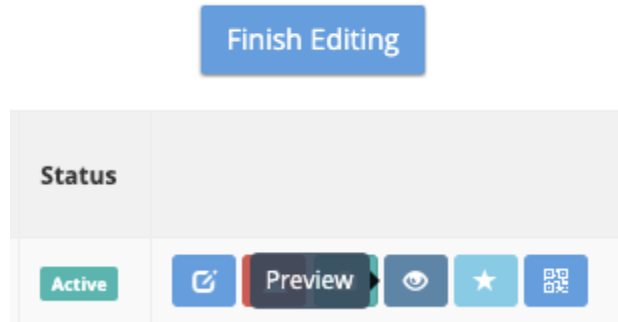
Personalized Giving Page Options

Not applicable to the crowdfunding page and will not be visible to donors.

Finish Editing & Preview Page

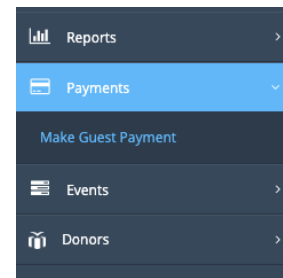
When you are satisfied with changes to your page, click the blue **Finish Editing** button to save your changes.

You'll be redirected back to the View All Events page, where you can preview your organization's page by selecting the **blue Eye Icon**.

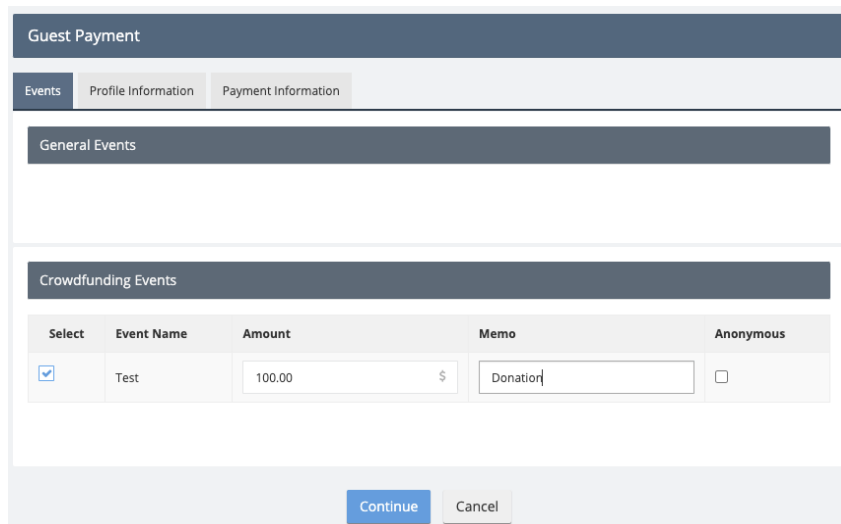


PROCESSING INDIVIDUAL IN-PERSON CASH & CHECK TRANSACTIONS (Guest Payments)

To process Cash & Check transactions, navigate to Payments > Make Guest Payment.



Within the Guest Payment Page, navigate to the Crowdfunding Events section and select your event. Enter the amount and applicable memo information in the corresponding fields. If the donor would like to be 'anonymous', click the checkbox under the Anonymous column. Click the blue Continue button to proceed.



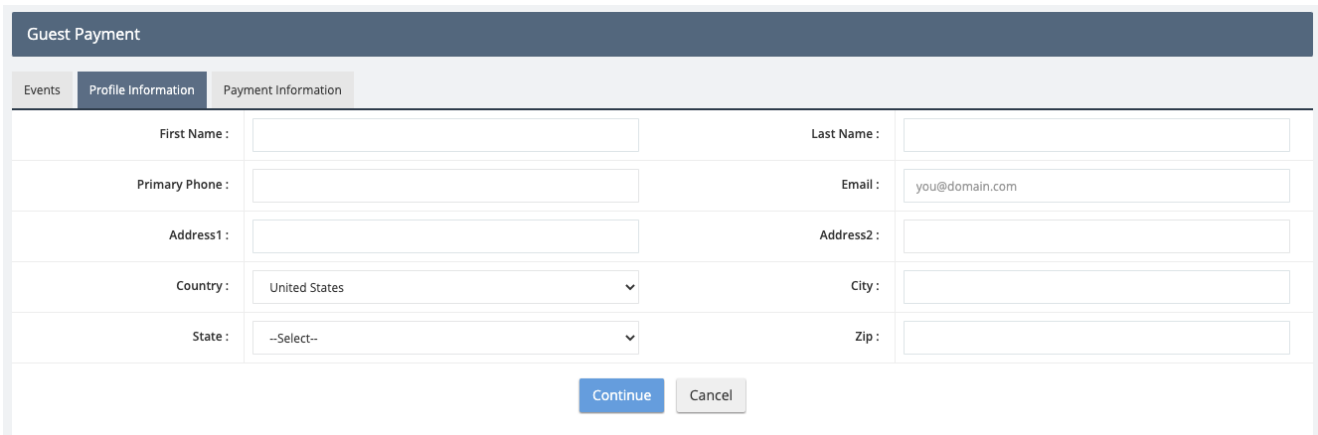
Select	Event Name	Amount	Memo	Anonymous
<input checked="" type="checkbox"/>	Test	100.00 \$	Donation	<input type="checkbox"/>

Under the Profile Information tab, enter the required demographic information for the donor:

- First Name
- Last Name
- Email
- Address (Line 1, City, State, Country, Zip)

Phone is not required.

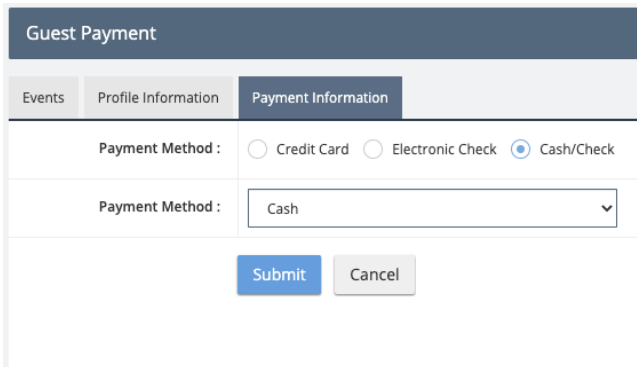
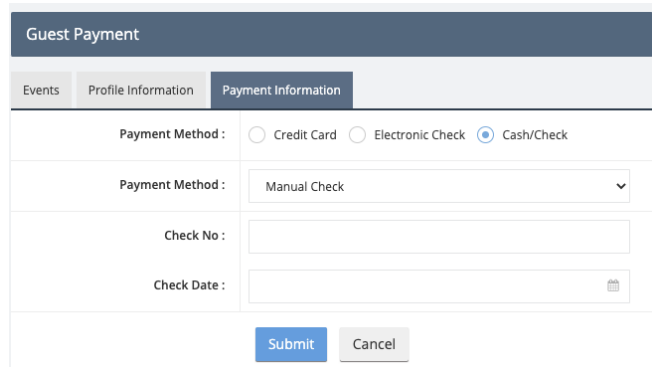
Click the **blue Continue button** to proceed.



Payment Method: Cash/Check

Payment Method (Dropdown): Select Cash or Check

Check Options: Include Check No. and Check Date

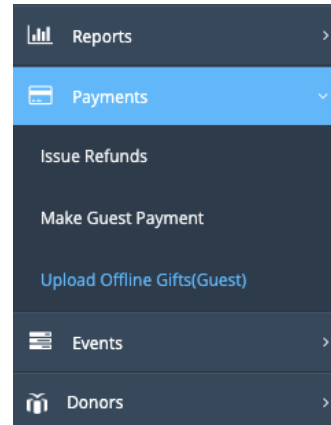
Click the **blue Submit button** to process the Cash/Check payment. Your organization is responsible for collecting the physical funds for this transaction.

For in-person ACH/Credit Card payments, we recommend using your organization's main crowdfunding page, not the Guest Payments page.

PROCESSING BULK IN-PERSON CASH & CHECK TRANSACTIONS (Upload Offline Gifts)

To process multiple Cash/Check transactions made throughout the day, you can batch upload multiple gifts using the Upload Offline Gifts feature.

Navigate to Payments > Upload Offline Gifts (Guest)



In the top right hand corner of the screen, click the **Download Sample CSV Format button** to download the CSV template to enter donations into. The file will download to your hard drive downloads folder.

Required Fields:

- FirstName
- LastName
- Email
- Address1
- City
- Country
- State
- Zip
- PaymentMode: "Cash" or "Check"
- Amount: ##.## (" \$" is not required)
- CheckNo: #####
- TransactionDate: mm/dd/yy
- Anonymous: "Yes" or "No"

Not Required:

- Address 2
- Gender: "M" or "F"
- Phone 1
- Memo

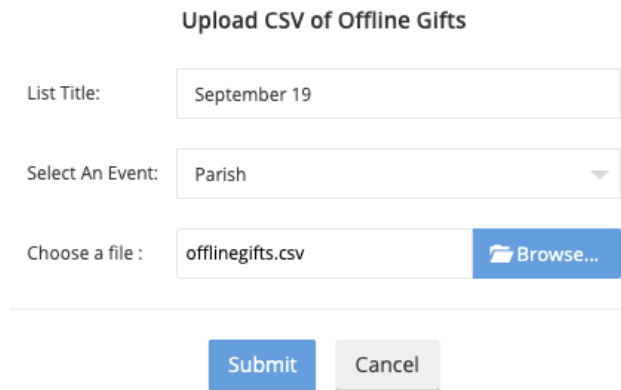
Once you have completed your spreadsheet information, save the file on your desktop or folder of choice, and return to the Upload Offline Gifts screen.

List Title: Enter a name of the list you're uploading.

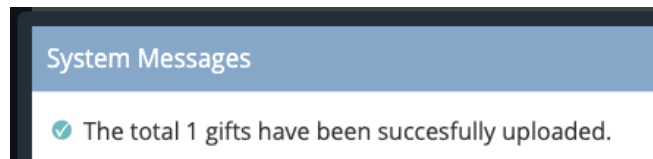
Select an Event (Dropdown): Select your organization page.

Choose a file: Select the **blue Browse button** and navigate to where you saved your .CSV file and upload the

Click the **blue Submit button**.



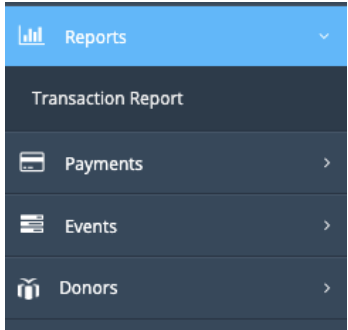
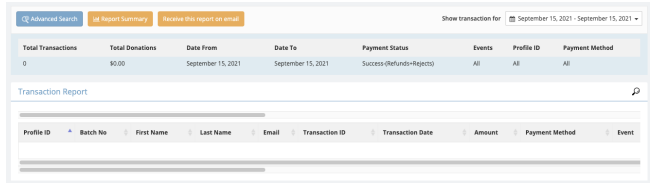
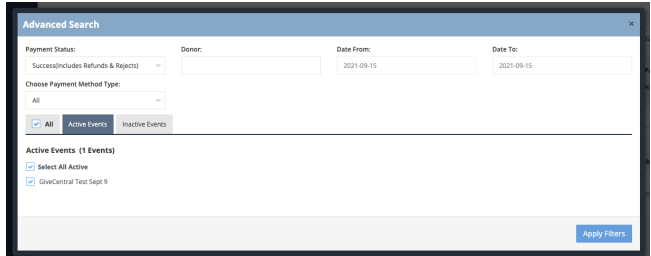

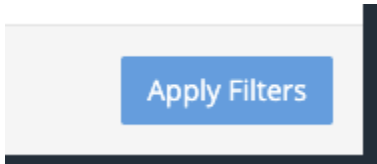
You'll receive a successful system message when the gifts uploads



Under the Uploaded Lists section, you'll be able to see a history of all the lists your organization has uploaded into the system.

Any contacts listed under Exception Contacts will not have successfully uploaded. You can download the Exception File to look at these gifts and adjust/re-upload as needed.

Uploaded Lists							
List Title	Total Gifts	Amount	Added On	Download List	Exception Contacts	Exception File	
September 19	2	\$1,000.00	16 Sep 2021	Download	1	Download	

TRANSACTION REPORT	
<p>To view the real-time donations being taken in by your organization, you can run a limited transaction report as an administrator.</p>	
<p>Navigate to Reports > Transaction Report.</p>	
<p>The report screen will show the last run report, or default to today.</p> <p>Click the light blue Advanced Search button in the top right corner.</p>	
<p>Enter the applicable fields:</p> <p>Payment Status: Success (Includes Refunds and Rejects)</p> <p>Donor: Leave blank to view all donors to your organization.</p> <p>Date From: Select the first day you'd like to view donations from. (Ex. First day your page is live and accepting donations.)</p> <p>Date To: Select the last day you'd like to view donations from. (Ex. Last day your page is live and accepting donations.)</p> <p>Choose Payment Method Type: All</p> <p>Active & Inactive Events: Check the box next to All to select your organization.</p>	 
<p>Click the blue Apply Filters button to run the report.</p>	

You'll be able to view a summary of donations made to your page as well as all the transaction information (ex. Transaction ID, Payment Method, etc.)

Profile ID	Batch No	First Name	Last Name	Email	Transaction ID	Transaction Date	Amount	Payment Method	Event
ClaireMurphyTutorial		Claire	Murphy	cmurphy@givecentral.org	C61428F5570F85	2021-09-15	\$1.00	Visa - xxx6300	Offertory Giving

To download the report as a .CSV file, click the Excel icon button and the report file will download onto your designated downloads folder.

ISSUING REFUNDS

To issue a refund, you will need to gather the **Transaction ID** following information from the Transaction Report. Found in the sixth column, Transaction ID, below in blue.

Profile ID	Batch No	First Name	Last Name	Email	Transaction ID	Transaction Date	Amount	Payment Method	Event
ClaireMurphyTutorial		Claire	Murphy	cmurphy@givecentral.org	C61428F5570F85	2021-09-15	\$1.00	Visa - xxx6300	Offertory Giving

Once you have the **Transaction ID**, navigate to Payments > Issue Refunds.

On the Issue Refunds page, enter the Transaction No. and select the **blue Search button**.

Issue Refunds

Event : --Any--

Transaction No. :

User :


(Please enter first name or last name of the donor to search)

The donor's transaction should be visible on the next page. Select the **green Arrow icon** to continue with the refund.

Issue Refunds

Please click on Process Refund icon to proceed

View Per Page

Transaction No.	Transaction Date	Donor Name	Amount	Payment Method	Event	User	
C61428F5570F85	2021-09-15 19:27:21	Claire Murphy	1.00	Visa-xxx6300	Offertory Giving	ClaireMurphyTutorial	

Page 1 of 1

On the Process Refund Screen, you can determine if you'd like to give a full or partial refund for the transaction, and any memo details you would like to include.

Process Refund

User Name :	ClaireMurphyTutorial	Event :	Offertory Giving
Transaction Reference No :	C61428F5570F85	Transaction Date :	2021-09-15 19:27:21
Payment Method :	Visa-xxx6300	Amount :	1.00
Refund Type :	<input checked="" type="radio"/> Full Refund <input type="radio"/> Partial Refund		
Memo :			

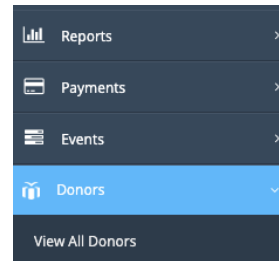
When you are ready to process the refund, click the **blue Submit button**. You will receive a system message once the refund processes. The donor will receive an email confirmation of the refunded payment.

System Messages

✔ A Refund of \$1.00 has been scheduled successfully!

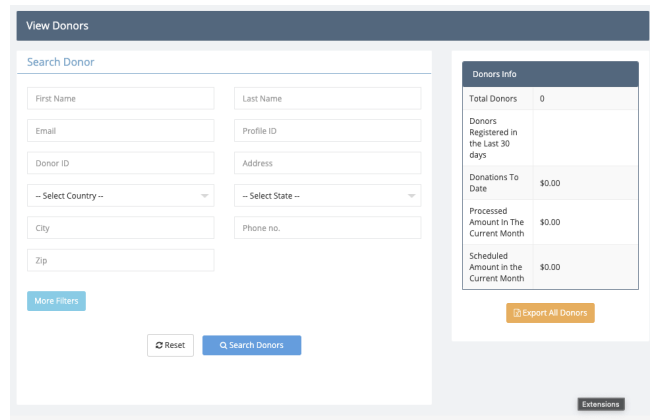
DONOR INFO & ADJUSTING ANONYMOUS GIFTS

If you would like to gather information on the donors who have given to your page, you can do so by navigating to **Donors > View All Donors**.

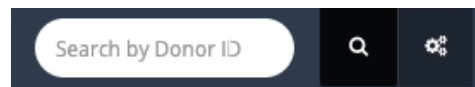


Using the **yellow Export All Donors button** will allow you to download a .CSV file of all donors who have given to your organization.

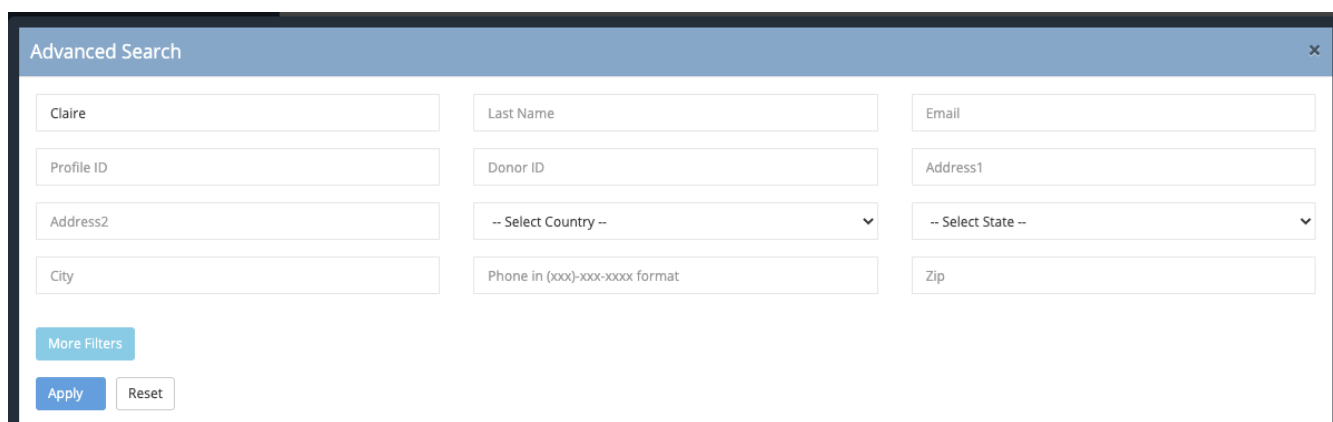
You can look for individual donors within GiveCentral by searching for them via one of the fields under Search Donors. We recommend searching by their email or last name, but only use one identifying piece of information as to not over limit your search parameters.



You can also search for donors via the Advanced Search function by clicking the **Magnifying Glass icon** in the top right hand corner of the screen (across all GiveCentral pages.)



Within the Advance Search function, you can search for a donor via one of the fields listed (we recommend email or name) and then click the **blue Apply button**.




If you would like to view the donor activity for a certain donor, under the Profile ID column, click on their **blue Hyperlinked Profile ID** to open their donor page.

Location	Profile ID	First Name	Last Name	Email	Address	Donor ID	Parish
Giving Tuesday Demo	guest6143a32c3d99f	Claire	Murphy	cmurphy@givecentral.org	2 N Riverside Dr, Suite 1350, IL, 60606	Not Available	Not Available

[Close](#)

On the donor's profile page, you will be able to see their giving history, their demographic information, and have the ability to change their gift to or from an anonymous type gift.

Donor : Claire Murphy



Claire Murphy

[Deactivate User](#)

[View Change History](#)

[Edit primary information](#)

[View Payment Activity](#)

[Tax Letter](#)

✉ cmurphy@givecentral.org

📍 2 N Riverside Dr Suite 1350

Employer

Tags [Add](#) [Delete](#)

Groups [Add](#) [Delete](#)

To change a gift's 'anonymous' status, on the donor's profile page, select the **orange View Payment Activity button** and you'll be brought to their most recent transactions.

To change the gift to read as 'anonymous,' toggle the switch in the anonymous column to the **blue ON** setting or **grey OFF** setting.

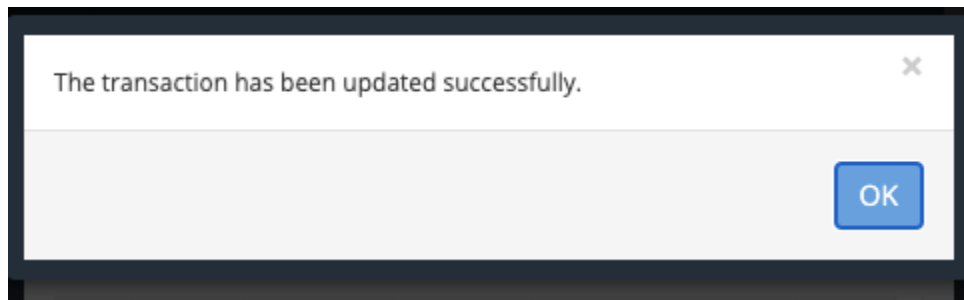
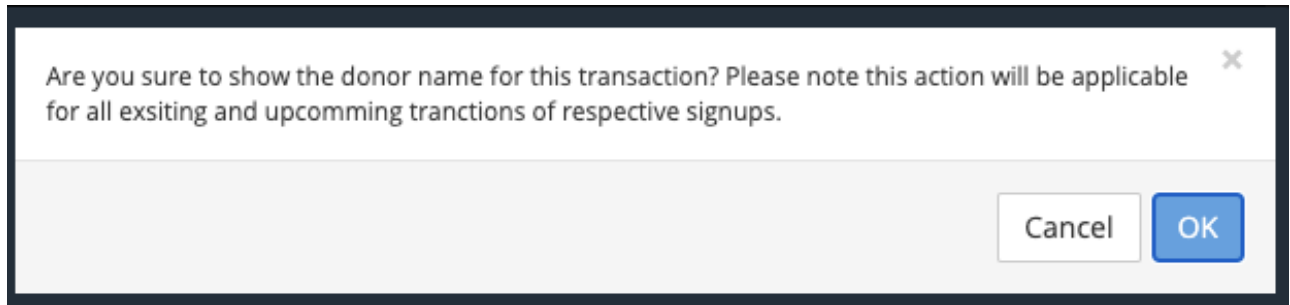
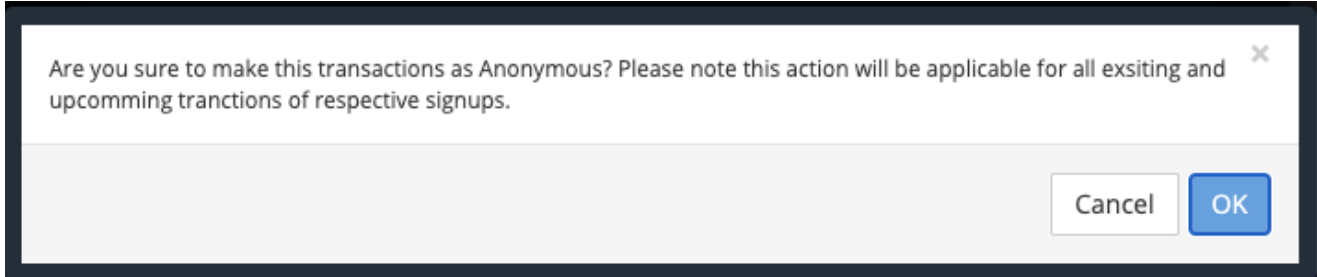
Transaction History ✕

Select Action [Proceed](#)

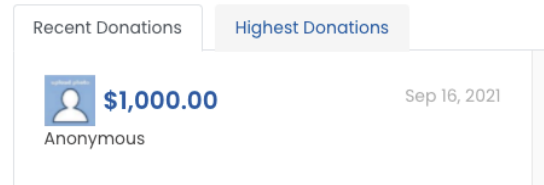
<input type="checkbox"/>	Event Name	Payment Date	Amount	Transaction Id	Anonymous	Status	Reason for Failure
<input type="checkbox"/>	Parish	2021-09-16	\$1000	C/M6143a32c9e0e3	<input type="checkbox"/>	success	

1

You will receive a system warning message followed by a successful updated transaction message for both turning on and off the anonymous setting.



Example of a donation with an anonymous donor.



Example of a donation with a public name attached.

