

Welcome Guide

Count on us every step of the way!

GiveSmart[®]
by **community**brands[®]

Welcome to GiveSmart!

We're committed to being a partner in your success. From strategic guidance through how-to questions to campaign creation and execution, our expert team is here, year-round, as a partner who helps focus your resources to make the greatest impact!

This welcome guide is intended to walk you through next steps after purchasing your subscription along with an overview of our team and the services we provide. Be sure to complete the Customer Support webinar series for a full tour of the features and benefits of our GiveSmart platform.

We appreciate the opportunity to be your end-to-end fundraising platform. We're here to support you every step of the way and help you energize your mission.

Your GiveSmart Team

GiveSmart[®] *Fundraise*

Full-service tools for year-round fundraising, including peer-to-peer campaigns, text-to-donate capability, customizable donation forms, flexible recurring giving options and robust communication and marketing tools.

GiveSmart[®] *Events*

All the tools you need for live, virtual or hybrid events, including ticketing, guest and seating management, silent and live auctions, voting, item sales, and video streaming.

GiveSmart[®] *Donor CRM*

A modern, simple-to-use donor management tool designed to save time and increase giving with tools including elastic search technology, built-in filtering and inverse filtering, donor search and scoring, gift acknowledgement and more.

GiveSmart Fundraising Suite

MAKE YOUR MISSION A MOVEMENT

Inspire and engage donors with smart, simple tools and a partner invested in your success

Energize your mission by building better donor connections and experiences. It starts with easy-to-use tools and an innovative, modern platform that elevates any campaign. Exceed your fundraising, event and donor management goals while you receive expert support from a partner who helps focus your resources and make the greatest impact. With GiveSmart, turn your mission into something that moves donors.



Quick Start

Let the fundraising journey begin!



Admin Access

Admin access

A welcome email is sent to the individual in your organization who is listed as the initial contact on your GiveSmart subscription agreement. This email is delivered upon signing the merchant application. The email contains a link to complete their account setup, granting them access to the GiveSmart platform.

Switching between products

Upon logging in the 1st time, you will land in GiveSmart Fundraise. The 9 Dot application switcher (or waffle menu) in the top right will allow you to seamlessly switch between your Fundraise and Events products without having to log in again.

Adding additional admin

As an admin you will have the ability to create additional admin.

1. From the Fundraise product, select the settings (gear icon) at the top
2. Click +Add User
3. Enter the required information
4. Modify the User Role to 'Admin'
5. Click 'Create User'

Once the new admin is created, they will receive an email with instructions on how to complete their account setup.

Need help?

If you are the initial contact on the agreement and did not receive an email, check your spam folder for an email from GiveSmart. If you're still unable to locate the email, reach out to support and request the email notification to be resent.

Get Started in Fundraise

Let's get trained

Access the free [GiveSmart Fundraise Fundamentals Training](#) when you're ready to get started. This four-part training program takes you through the most common platform features and uses, so you feel confident working with the Fundraise product.

Quick links

- [Account Settings](#)
- [Creating a Campaign](#)
- [Quick Start Account Checklist](#)
- [Text to Donate Fundraising](#)
- [Crowdfunding and Peer to Peer Fundraising](#)
- [Website Donation Form](#)

GiveSmart[®]
Fundraise

- Peer to Peer
- Online giving
- Text to donate
- Recurring giving
- Mobile marketing
- Reporting & analytics
- Marketing & communications

Get Started in Events

Let's get trained

Access the free [training videos](#) when you're ready to start planning your auction or ticketing events. These videos will help you get started with your GiveSmart event.

Quick links

- [Set your Terms and Conditions](#)
 - Terms and Conditions must be complete for your site to go live.
- [Next Steps and Checklists](#)
- [Site Settings](#)
- [Customize your Site](#)
- Create an Item
 - [Auction](#), [Raffle](#), [Donate](#), [Instant](#)
- [Tickets and Sponsorships](#)

The logo for GiveSmart Events, featuring the word "GiveSmart" in a bold, purple, sans-serif font, with "Events" in a smaller, italicized, purple, sans-serif font below it. The logo is set against a light purple circular background.

GiveSmart[®]
Events

- Ticket & seating management
- Silent & live auction
- Fundraising events
- Live, virtual & hybrid events
- Raffle, voting & instant buy

Get Started in Donor CRM

Let's get trained

Access the [Learning Center](#) once you've completed your Guided Implementation session.

Quick links

- [Donor CRM Overview](#)
- [Add a New Gift](#)

Guided Implementation

Your Donor CRM package includes Guided Implementation with an Advisor who will:

- Help you configure and customize GiveSmart Donor CRM to meet your organization's unique needs
- Show your team how to navigate, operate, and manage GiveSmart Donor CRM
- Provide project management for Data Conversion (if applicable)



GiveSmart[®]
Donor CRM

- Donor stewardship
- Querying & reporting
- Individual donor gifts/pledges
- Donor search / wealth management
- Donor scoring



Credit Card Processing

Merchant account information

There is a 3.5% fee for DISC, VISA & MC and a 3.95% fee for all AMEX transactions.

Fees on Events:

- Transactions are batched nightly each business day and deposited into your organization's bank account, less credit card fees, within 5 business days of the batch date.

Fees on Fundraise & Donor CRM:

- Transactions are batched nightly each business day and deposited into your organizations bank account. Fees are deducted monthly for all transactions occurring that month.

For your bank to accept deposits from purchases and withdrawals, per NACHA (National Automated Clearing House Association) you must contact your bank and add the ACH ID (G592126793) to your account. Failure to notify your bank with this ID may result in a hold on funding activity, which will require your organization to provide ACH ID confirmation and bank documentation in order to resolve and release any held funds.

Funds deposited into your bank account will appear as the following:

- Events funding: MERCHANT BANK CD
- Fundraise funding: MERCHANT BANKCD DEPOSIT 496---

Passing fees to purchasers

GiveSmart provides organizations the option to pass these fees to supporters. These settings can be controlled in both [Fundraise](#) and [Events](#).

Important!

An active merchant account is required to share your site publicly, accept monetary donations and process credit card payments.

Resources

Need to know at your fingertips

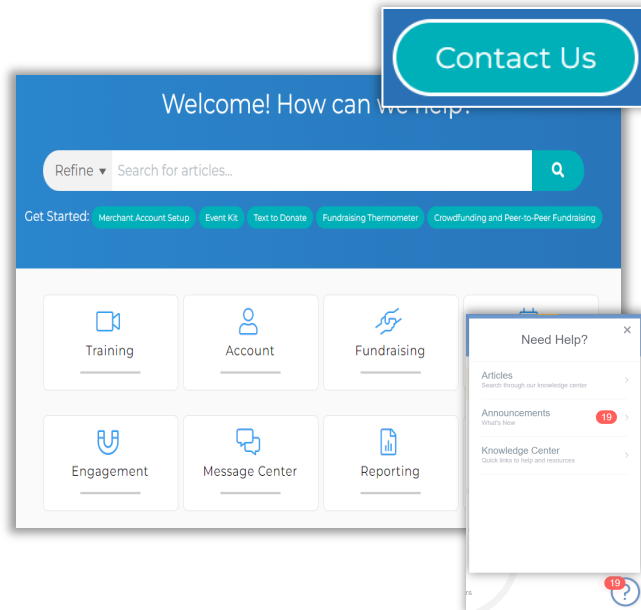


Support Resources

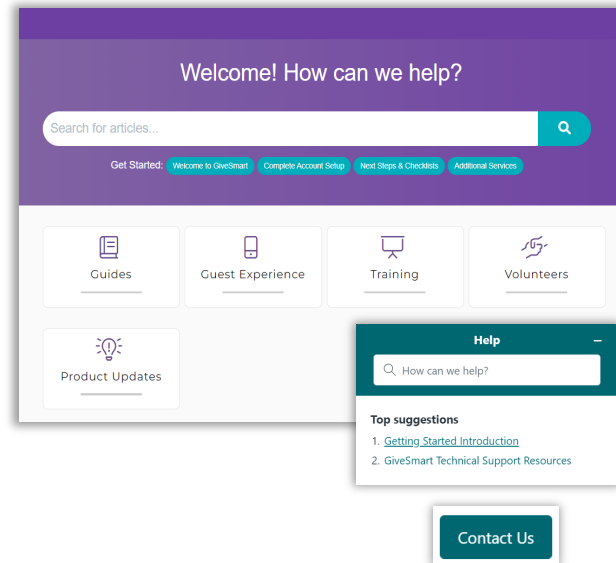
Technology Support:

- 24/7 HELP & CONTACT US Buttons
- 24/7 Email
- Phone Assistance
- Help Center & In App Guides
- [Learn More](#)

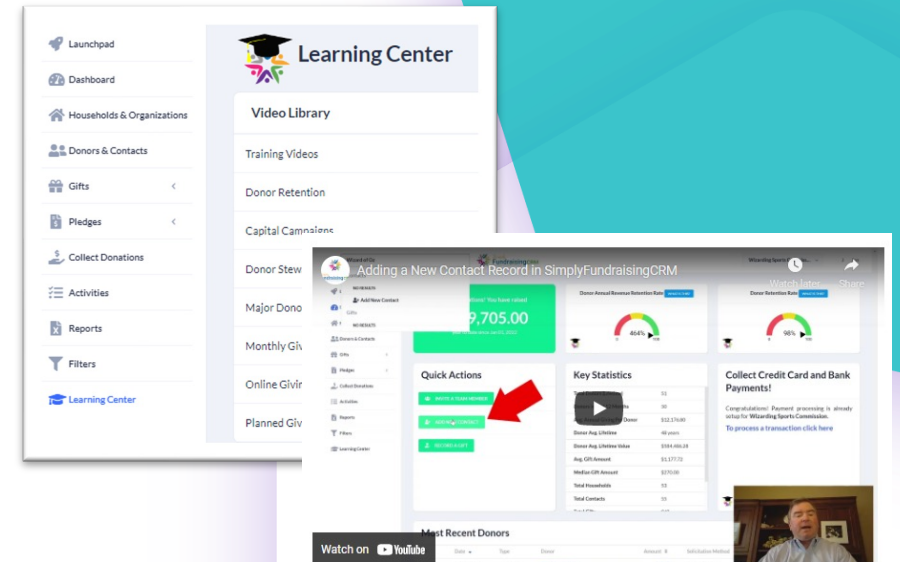
GiveSmart®
Fundraise



GiveSmart®
Events



GiveSmart®
Donor CRM



Frequently Requested Resources

Fundraising Strategy:

[Annual Planning Calendar](#)
[Route to Success Guide](#)
[Corporate Donor Guide](#)
[Nonprofit Goal Planning](#)
[Days of Giving Guide](#)
[GiveSmart Community](#)



Raise Up to 60% more with
[GiveSmart Community](#)

GiveSmart Fundraising:

Getting Started

[GiveSmart Fundraising Log In](#)
[Training Webinars](#)
[Add additional Admin](#)

Managing your Campaign

[Text-to-Donate Campaign](#)
[Setup Peer to Peer Activity](#)
[Setup Website Donation Form](#)
[Create Recurring Donors](#)
[Reporting Training](#)
[Merchant Account FAQs](#)

Know of a nonprofit in need of
fundraising technology?
Customer Referral Program

GiveSmart Events:

Getting Started

[GiveSmart Events Log In](#)
[Getting Started Introduction](#)
[Training Webinars](#)
[Ten Steps Prior to Sharing your Site](#)
[Safely Share Your Site Link](#)
[Merchant Account FAQs](#)

Managing your Event

[Event Site Customization](#)
[Ticketing and Seating Management](#)
[Import Users from a Guest List \(w/o Ticketing\)](#)
[Pass Fees to Purchaser](#)
[Item Management](#)
[Donor Communication](#)
[Preferred Partners \(onsite staff & equipment\)](#)
[Reports Overview](#)