

# EXTENDED HEARTS

GiveNow Instruction Manual



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## WELCOME TO THE EXTENDED HEARTS FAMILY

Dear Friend,

Thank you for choosing Extended Hearts and welcome to the Extended Hearts family.

At Extended Hearts, we understand how important fundraising is to the success of your organization, which is why we vow to be here for you throughout the entire process. In fact, we hope that you'll grow to think of us as an integral part of your fundraising team.

Our company was formed to help groups and charities, such as yours connect with people around the world that are passionate about a particular cause. We believe that by minimizing the steps and costs involved in raising awareness and funds, organizations can then meet and exceed their goals, by being able to access a larger number of donors, and carry out fundraising initiatives year-round.

Your satisfaction is our priority and we value your feedback. If you are disappointed with something, let us know so we can address the problem. If you have a question or suggestion, we'd love to hear it. And if we exceed your expectations, tell us about it, so we can keep doing it!

As always, thank you for allowing us to be a part of your organization and we look forward to working together to make a difference in communities all over the world.

Sincerely,

Milton L. Gibson, CEO and President

# UPDATING YOUR LOG-IN INFORMATION

Before you develop your GiveNow Donation Page, you must first change your log-in information. Using the temporary log-in information assigned in your Account Approval email.



1. Log in to your GiveNow account
2. Select the **Login Info** tab on the GiveNow Administration Panel.



3. Type in your new **Username and Password\***
4. Confirm your password by re-typing it in the appropriate text field.

\*All Passwords must be changed upon log-in.



5. Select Update **Log-in Information**.
6. Select **OK** on the pop-up screen confirming the successful update of your log-in information.

# CHANGING YOUR ACCOUNT INFORMATION

## Modifying Your Organization's Information

**GiveNow Administration**

- GiveNow Buttons
- Donation Page
- Sponsors
- View Reports
- (Un) Searchable
- Convenience Charge
- Contact Info**

To make changes to the contact information associated with your GiveNow account,

1. Select **Contact Info** on the Administration Panel.

**Modify Contact Information**

\* Organization Name: My Organization

Legal IRS Name (if different):

\* Address: 1234 Main Street

Address 2:

\* City: Anywhere

\* State: NY

\* Zip/Postal Code: 14830

\* Country: USA

\* Organization Type: 501(c)(3) Public Charity

\* Website: www.myorganization.com

**Primary Contact Information**

\* Title: President

\* First Name: Joe

Middle Initial:

\* Last Name: Smith

\* Email: JSmith@email.com  
Donation Notifications and all other correspondence will be sent to this address.

\* Phone: 5555551234

**Update Contact Information**

2. Modify any information
3. Select **Update Contact Info**

## Modifying Your Billing Information

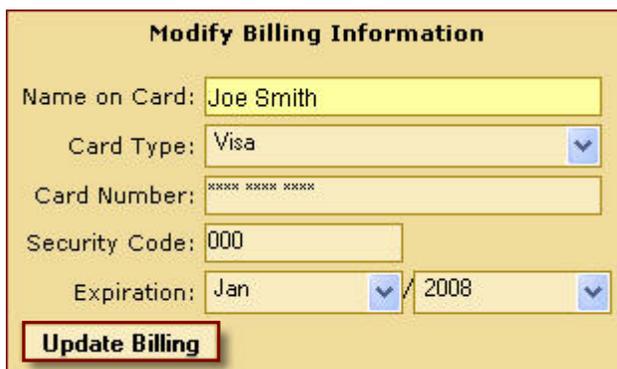


**GiveNow**  
**Administration**

- (Un) Searchable
- Convenience Charge
- Contact Info
- Login Info
- Billing Info**

To make changes to the billing information associated with your GiveNow account,

1. Select **Billing Info** on the GiveNow Administration Panel.



**Modify Billing Information**

Name on Card:

Card Type:  ▼

Card Number:

Security Code:

Expiration:  ▼ /  ▼

**Update Billing**

2. Make any necessary changes
3. Select **Update Billing**

## SELECTING YOUR GIVENOW BUTTON

The *GiveNow* feature offers buttons in a variety of colors and sizes to match your group or organization's website.



To select your *GiveNow* button,

1. Select ***GiveNow* Buttons** on the ***GiveNow* Administration Panel**.



2. Choose the *GiveNow* image that you would like to use by copying and pasting the image link onto your webpage.

## PERSONALIZING YOUR DONATION PAGE

With *GiveNow*, you can customize your Donation Page, adding logos and text allowing you to match the look and feel of your organization's website.



1. Select **Donation Page** on the **GiveNow Administration Panel**.

A screenshot of the 'Modify Donation Page' form. The form has a title 'Modify Donation Page' and a link 'Preview Donation Page'. Under 'Customize Page', it says 'Personalize your donation page.' There is a grid of 12 ribbon logos in various colors. To the right of the grid are two input fields: 'URL of Logo:' with the value 'www.myorganization.com/logo.htm' and 'Upload Logo:' with a 'Browse...' button. Below the grid is a 'Page Title:' field with the value 'My Organization'. Below that is an 'Introduction Text:' field with the placeholder text 'enter text here to welcome donors.'. At the bottom left is an 'Update' button.

2. Add your group or organization's logo by entering:  
The URL of the image link  
  
OR  
3. By Selecting **Browse** and uploading the file from your documents.
4. Enter the title of your donation page
5. Enter a short introduction, welcoming your donors and giving a brief description of your group's mission and/or services.
6. Select **Update**.

## Adding Donation Amounts

### Donation Amounts

Create Categories and List desired Donation Amounts within each category.

prevention	<a href="#">delete</a>	prevention \$ 10.00
building fund	<a href="#">delete</a>	to youth prevention programs
Scholarship Fund	<b>Add Category</b>	prevention \$ 20.00
<input type="text"/>		Category: <input type="text"/>
<input type="text"/>		Amount: \$ <input type="text"/>
<input type="text"/>		Description: <input type="text"/>
		<b>Add Amount</b>

Create Donation amounts and categories in which donors can contribute funds.

1. Type in the category
2. Select **Add Category**.
3. Continue adding as many categories as you'd like.

### Donation Amounts

Create Categories and List desired Donation Amounts within each category.

prevention	<a href="#">delete</a>	prevention \$ 10.00
building fund	<a href="#">delete</a>	to youth prevention programs
scholarship fund	<a href="#">delete</a>	prevention \$ 20.00
<input type="text"/>		Category: <input type="text"/>
<input type="text"/>		Amount: \$ <input type="text"/>
<input type="text"/>		Description: <input type="text"/>
		<b>Add Amount</b>

To create corresponding donation amounts,

4. Select a category from the drop down menu.

### Donation Amounts

Create Categories and List desired Donation Amounts within each category.

prevention	<a href="#">delete</a>	prevention \$ 10.00	<a href="#">delete</a>
building fund	<a href="#">delete</a>	to youth prevention programs	<a href="#">delete</a>
scholarship fund	<a href="#">delete</a>	prevention \$ 20.00	<a href="#">delete</a>
<input type="text"/>		Category: scholarship func	<input type="text"/>
<input type="text"/>		Amount: \$ 25	<input type="text"/>
<input type="text"/>		Description: Youth Center Music Scholarship	<input type="text"/>
		<b>Add Amount</b>	

5. Enter a dollar amount and brief description of where funds will be allocated.

6. Select **Add Amount**.

Continue inputting as many donation amounts as you'd like for each additional category.

7. Select **Delete** next to any donation amount or category that you would like to remove.

## Adding Gifts

### Gifts w/ Price Points

If you plan on giving Thank You for people who donate a certain amount,



**Amount:** \$ 25.00

**Title:** 15oz. Coffee Mug

**Description:**

As a special thank you to our supporter give you this 15oz. Burgundy Coffee Mug with the JoMa Foundation logo.

Donation's Above \$ 50.00 receive this gift.

Title: 32 oz. Travel Mug

Description:

As a special thank you to our supporters, we'd like to give you this 32 oz. hot/cold travel mug.

Upload Image:

Browse...

**Add Gift**

To offer your donors gifts for their contributions based on donation amounts,

1. Enter the lowest donation amount possible to receive a gift in the text field.
2. Enter the title of the gift and a brief description in the space provided.
3. Upload an image of the gift (if applicable) by Selecting **Browse** and selecting the image from your documents.
4. Select **Add Gift**.
5. To offer additional gifts, repeat the process for each item.

## Tell A Friend

Reach prospective donors and let your supporters share the news of their contribution with family and friends with the Extended Hearts Tell a Friend feature.\*\*

### Tell a Friend

Give supporters the opportunity to pass the word around.

On  Off

**Introduction:**

Share the news of your recent contribution with family and friends while spreading important information and statistics about the cause you care about. The Tell a Friend tool allows you to do just that with the click of the mouse!

**Default Email Message:**

Dear Friend,

HIV is a devastating virus that has infected millions of people throughout the world, and affected the lives of many more. This year in the United States, it is

**Update**

1. In the text field provided, enter a brief introduction to donors, explaining the Tell a Friend tool.
2. Enter your default email message that friends and family members of donors will receive.
3. After you are satisfied with your default message, select **Update**.

\*\* If you do not wish to use the Tell a Friend feature, you can disable the function by selecting the **Off** radio button under the Tell a Friend heading when modifying your Donation Page.

### Default Email Message Sample Text:

*Dear Friend,*

*HIV is a devastating virus that has infected millions of people throughout the world, and affected the lives of many more. This year in the United States, it is estimated that over 25,000 people will be unknowingly infected with this disease.*

*To help in the effort, I have recently made a donation to Fight HIV, Inc., a non-profit organization dedicated to providing youth HIV and STD prevention programs in the Hudson Bay area. With the help of my contribution, Fight HIV, Inc. will be able to continue in the battle against the spread of HIV/AIDS by offering free prevention programs for schools, information seminars for parents and teens, Peer Education conferences, and other vital services.*

*For more information on HIV/AIDS, or Fight HIV, Inc., visit the organization's website at [www.fighthivinc.org](http://www.fighthivinc.org), where you can also make a secure donation to help fight the spread of HIV.*

*Sincerely,*  
XXXXX



4. Click **OK** on the pop-up screen.

## Adding Questions to your Donation Page

You can use your *GiveNow* Donation Page to gather important information and insight from your donors by adding questions.

The screenshot shows a list of three questions in a table-like format. Each question has a dropdown menu to its left and 'edit' and 'delete' links to its right. The third question, 'What is your favorite color?', is selected. Below the table is an 'Update Order' button and an 'Add Question' button. A dropdown menu is open from the 'Add Question' button, showing three options: 'Checkbox: Select multiple options from a list', 'Textbox: Write a free-form answer', and 'Drop-down: Select one answer from a list'.

To insert questions before payment information is collected from donors, start by selecting the type of answer that you would like donors to give to your question from the drop down menu.

- **Checkbox:** Select multiple items from a list
- **Textbox:** Write a free form answer
- **Dropdown:** Select one answer from a drop down list

A close-up of the 'Add Question' dropdown menu. The 'Checkbox: Select multiple options from a list' option is selected and highlighted in blue. The 'Add Question' button is visible to the right.

1. For **Checkbox** answers, select **Add Question**.

The 'Update Question' dialog box shows the question 'What is your favorite color?'. Below the question are three answer choices: 'Blue', 'Orange', and 'Red'. Each choice has a 'delete' link next to it. The 'Orange' choice is selected, and the 'Add Answer' button is highlighted. The 'Update Question' button is at the top right.

2. In the pop-up window, type your question in the space provided and select **Add Checkbox Question**.
3. Enter answer choices one by one, selecting **Add Answer** after each selection.
4. To remove a selection, select **Delete** next to the answer.
5. When you are satisfied with your question and answer selections, select **Update Question** to add to your Donation Page.

Textboxes: Write a free-form answer

Question: What was your first boyfriend's name

Question: What was your first boyfriend's name

Drop-down: Select one answer from a list

Question: What is the capital of Alaska

Juneau [delete](#)

Anchorage [delete](#)

Fairbanks

1. For **Textbox** answers, select **Add Question**.
2. In the pop-up window, type your question in the space provided and select **Add Textbox Question**.
3. Select **Update Textbox Question**

1. For **Dropdown** answers, select **Add Question**.
2. In the pop-up window, type your question in the space provided and select **Add Question**.
3. Enter answer choice 1 and select **Add Answer**.
4. Continue adding as many answer choices as you would like, selecting **Add Answer** after each selection.
5. To remove an answer, select **Delete** next to the selection that you would like to eliminate.

## ADDING SPONSORS

Your GiveNow account lets you thank sponsors by adding their logos and web links to your Donation Page.



1. On the GiveNow Administration Panel, click **Sponsors**.

A screenshot of the "Add Sponsor" form. The form has a yellow background and a dark border. At the top, it says "Add Sponsor". Below this are two text input fields: "Sponsor WebPage Link:" with the value "www.testsponsor2.com" and "Image Link:". Below the "Image Link:" field is the text "Or" and "Upload Image:" followed by a text input field and a "Browse..." button. At the bottom of the form is a button labeled "Add Sponsor Link".

2. Enter the web address (if applicable) of your sponsor.
3. Enter the image link associated with your sponsor's logo,  
  
Or
4. Upload the file from your documents by clicking **Browse** and selecting the appropriate file.
5. Click **Add Sponsor Link**.
6. To include additional sponsors, enter information under the "Add Sponsor" Heading, located under previously added sponsor logos.

A screenshot of the "Update Sponsor" form. The form has a yellow background and a dark border. On the left side, there is a logo for "EXTENDED HEARTS" featuring two stylized figures holding hands around a globe, with the text "MAKING A DIFFERENCE IN COMMUNITIES ALL OVER THE WORLD" below it. To the right of the logo are two text input fields: "Sponsor WebPage Link:" with the value "www.testsponsor2.com" and "Image Link:" with the value "/givenow/images/sponsors/24-11.JPG". Below the "Image Link:" field is the text "Or" and "Upload Image:" followed by a text input field and a "Browse..." button. At the bottom of the form are two buttons: "Update Sponsor Link" and "Delete Link".

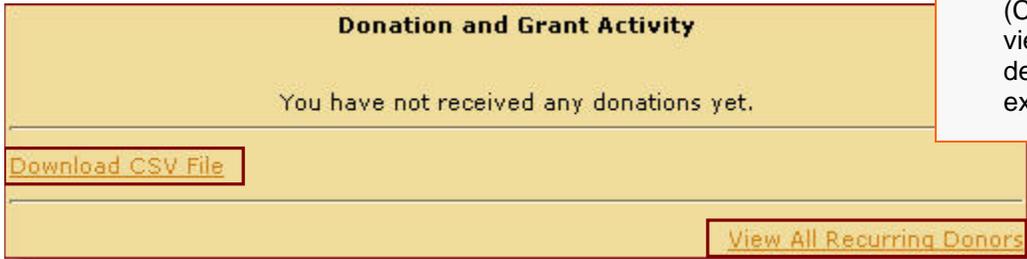
7. To update sponsor links and/or logos, simply enter the new information in the text field provided and click **Update Sponsor Link**.
8. To remove sponsor links, click **Delete Link** next to the link that you would like to eliminate

# VIEWING YOUR DONATION ACTIVITY



To view your organization's donation activity and/or export reports to other programs,

1. Select the **View Reports** tab on the *GiveNow* Administration Panel.



2. To view all donations coming on an on-going basis, click **View all Recurring Donations**.
3. Click **Download CSV File** (Comma Separated Values) to view donation amounts in delimited text file form and/or export to other applications.\*\*\*

\*\*\*CSV files are supported by most spreadsheet and database management systems.

You are now ready to begin collecting money through your *GiveNow* account!

## MODIFYING YOUR SEARCH ABILITY



To modify your organization's GiveNow search ability:

1. Click **(Un) Searchable** on the Administration panel.



2. Select the appropriate radio button denoting whether you would like to add or remove your organization from site wide searches.
3. Click **Update Searchability**



4. Click **OK** in the pop up window, indicating a successful update of your information.

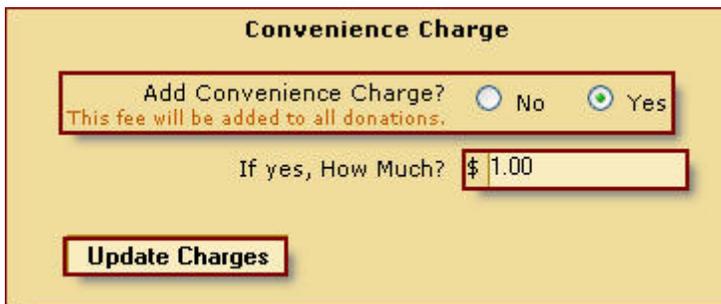
## ADDING A CONVENIENCE CHARGE TO DONATIONS

Extended Hearts allows you to add a convenience charge to donations made through your *GiveNow* account.



To set the amount of your convenience charge:

1. Click **Convenience Charge** on the *GiveNow* Administration Panel.
2. Select the **Yes** radio button.
3. Enter the dollar amount of your



The image shows a form titled "Convenience Charge". It contains the following elements:

- A question: "Add Convenience Charge?" with two radio buttons: "No" (unselected) and "Yes" (selected).
- A note: "This fee will be added to all donations."
- A label: "If yes, How Much?" followed by a text input field containing "\$ 1.00".
- An "Update Charges" button at the bottom.

convenience charge in the space provided.

4. Click **Update Changes**.



5. Click **OK** in the pop up window, indicating a successful update of your information.