EXTENDED HEARTS

MAKING A DIFFERENCE IN COMMUNITIES
ALL OVER THE WORLD

ProjectBuilder 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

APPLYING FOR *PROJECTBUILDER*

1. On the Extended Hearts home page, click **Apply for Service** under the *ProjectBuilder* tab.

2. Select **Continue** after reading the brief *ProjectBuilder* Introduction.

* Name on Card:	Joe Smith
* Card Type:	Visa
* Card Number:	12345678900000000
* Security Code:	1234
* Expiration:	Jan / 2007

Billing Contact

* First Name	Joe
Middle Initial	
* Last Name	Smith
* Email	joesmith@myorganization.com
* Phone	555-555-5555
* Extension	555
* Address	1234 Cherry Hill Road
Address 2	
* City	Fairview
* State	US
* Zip/Postal Code	12345
* Country	USA

<-- Back   Continue -->

3. Enter the information where Extended Hearts and your Sponsors will be able to contact your organization. You will be given a chance to edit this information once registration is complete.

4. Tell us more about your organization by detailing your program information.

* Annual Organization Budget	$0 -$149,999
* Primary Focus	(Please select the issue area that most strongly describes your organization's focus.)
	Arts and Culture
* Primary Constituents Focus	(Please select the constituents that most strongly describe your organization's focus.)
	Students

Referral Information

* How did you hear about us?	Google Search
Other Source	

If you were referred by an Extended Hearts customer, please complete the fields below so that we may give them referral credit.

Referring Organization Name	
Referring Person's Name	

<-- Back   Continue -->

5. Select the *ProjectBuilder* service that you would like to use and select **Continue**.

6. Carefully read the Extended Hearts Terms of Service and select

   I Accept

   or

   I Don't Accept

7. If you do not accept the Extended Hearts Terms of Service, please submit your reasons in the text field provided on the next page.

8. Enter your payment and billing information in the spaces provided.

   Note: You will be able to modify this information upon registering for ProjectBuilder.

9. Select **Continue.**

10. Confirm all of the information that you provided.

11. You can modify the information by selecting the **Edit** link next to the section that you would like to change.

12. Once you are finished, select **Submit Application**.

After your application has been accepted, your credit card will be billed and you will receive an email containing your *ProjectBuilder* username and password.

The page at https://extendedhearts.com says:

⚠ We have received your application. A copy has been sent to your email address. Upon approval we will charge your credit card and you will receive another email with your login information.

OK

CHANGING YOUR ACCOUNT INFORMATION

MODIFYING YOUR ORGANIZATION'S INFORMATION

To make changes to your organization's information:

1. Select **Organization Info** on the *Project Builder* **Administration Panel**.

2. Make any necessary changes.

Primary Contact Information

* Title	president
* First Name	John
Middle Initial	
* Last Name	Smith
* Email	John_Smith@myorganization.com

Donation Notificactions and all other correspondance will be sent to this address.

* Phone	555-555-1234

Update Organization Information

3. Select **Update Organization Information.**

UPDATING YOUR LOG-IN INFORMATION

Before you create your *ProjectBuilder* Donation Page, you must first change your login information. Using the temporary login information assigned in your Account Approval email:

1. Log in to your *ProjectBuilder* account

2. Select the **Login Info** tab on the *ProjectBuilder* **Administration Panel**.

*All Passwords must be changed upon login.

3. Type in your new **Username and Password***

4. Confirm your password by re-typing it in the appropriate text field.

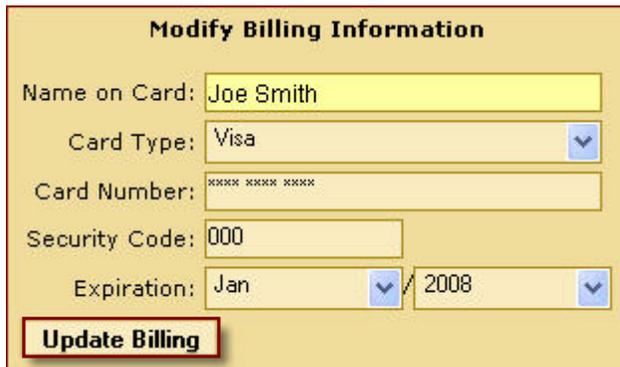5. Select Update **Login Information.**

6. Select **OK** on the pop-up screen confirming the successful update of your login information.

MODIFYING YOUR BILLING INFORMATION

1. To make changes to the billing information associated with your *ProjectBuilder* account,

2. Select the **Billing Info** tab on the *ProjectBuilder* Administration Panel.

3. Make any necessary changes to your information

4. Select **Update Billing**.

ADDING PROJECTS

To add projects to your *ProjectBuilder* account:

1. Select **Projects** on the *ProjectBuilder* **Administration Panel**.

2. Select the **Create New Project** link

3. Add your organization, program, or event logo by entering the URL in the spaces provided.

   Or

   Upload the image by clicking **Browse** and selecting the file from your documents.

Create Project

URL of Logo:

Or

Upload Logo: C:\Documents and [Browse...]

Project Title: Building a Brighter Future

Project URL: http://www.extendedhearts.com/ BrightFuture

4. Enter your project title and create your unique project URL.

Create Project

Alumni Association
Arts and Culture
Children Youth and Family
Civic Participation and Electoral Refor
Civil Rights
Community Affairs
Community Health
Economic Development
Economic Justice
Economic Justice/ Globalization
Education
Employment
Environment
Environmental Justice
LGBT Community
Health
HIV/AIDS
Housing
Human Rights
International Relief and Development

Project Title:

Project URL:

Primary Focus   Alumni Association

5. From the dropdown menu, select the primary focus of your project.

Country USA **Total Need: $** 150,000 **Project Needs and Beneficiaries** Describe how the project will benefit the individuals outlined, as well as what is needed to accomplish said needs.	6. Enter the country from which your project is primarily based. 7. Enter the total amount of money that you would like to raise. 8. Under **Project Needs and Beneficiaries** heading, describe the need for your organization, program, or event.

Activities List Activities which will enable project to be successful. **Potential Long Term Impact** Possitive long term impact of the project to the individuals, community, or other.	9. Describe your organization's activities in the allotted text field under the **Activities** heading. 10. Enter the potential long-term impact of your organization's programs and/or services under the **Potential Long-term Impact** heading.

Project Message Project message to it's donors as well as recipients	11. Under the **Project Message** heading, enter your program, event, or organization's primary message.

12. Enter your group's contact information in the allotted text fields.

13. Select **Create Project**.

14. Select **OK** in the pop-up screen confirming the successful addition of your project.

Now it's time to personalize your project…

MODIFYING YOUR PROJECT

With *ProjectBuilder*, you can make changes to your project throughout the entire fundraising process, adding photos, progress reports, and team bios to keep your donors abreast of your development activities.

ADDING/MODIFYING DONATION AMOUNTS

On the **Modify Project** page, under the **Donation Amounts** heading,

1. Enter a donation category in the allotted text field and select **Add Category**.

2. Continue to add as many categories as you'd like.

3. To create corresponding donation amounts, select a category from the drop down menu.

4. Enter a dollar amount and brief description of how or where the donated funds will be allocated,

5. Select **Add Amount**. Repeat for every donation amount in each category.

ADDING/MODIFYING TEAM BIOS

Share info about your organization's key players by adding Team Bios to your Project Page.

On the **Modify Project** page, under the **Team Bios** heading,

1. Enter the team member's name and biographical information in the allotted text fields.

2. Select **Add Bio**.
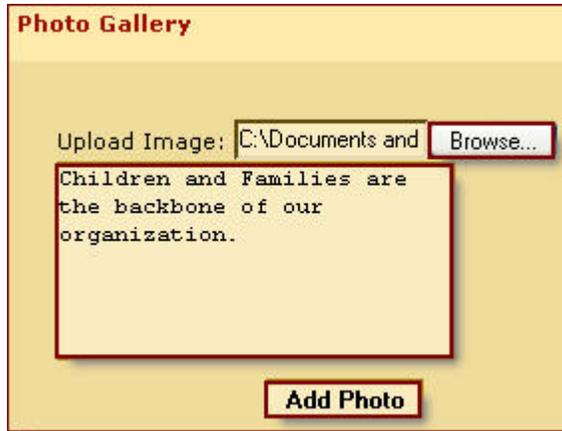
3. Continue adding as many bios as you'd like.

4. To remove a Team Bio, select **Delete** next to the item(s) that you would like to erase.

CREATING/MODIFYING YOUR PHOTO GALLERY

Upload pictures of your organization in action in your own *ProjectBuilder* Photo Gallery.

On the **Modify Project** page, under the **Photo Gallery** heading,

1. Select **Browse** to locate and upload your image.

2. Using the allotted text field, write a brief description of the uploaded image.

3. Select **Add Photo**.

4. Once the image successfully uploads, select **OK** on the pop-up screen.

5. Continue adding as many images as you'd like to your Photo Gallery.
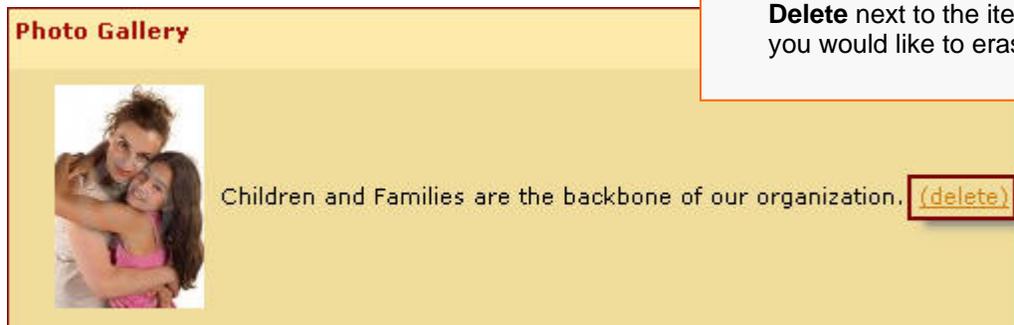
6. To remove a photo, select **Delete** next to the item(s) that you would like to erase.

MODIFYING YOUR PROJECT INFORMATION

Using the **Modify Project** page, you can update or change your basic project information.

Under the **Overview** heading, make any necessary changes

1. Select **Update Overview**.

ADDING PROGRESS REPORTS

Keep donors and team members abreast of your Fundraising progress with detailed Progress Reports.

Under the **Progress Reports** heading of the **Modify Project** page:

1. Enter your Progress Report title and information in the allotted text fields.

2. Select **Add Report**.

3. Continue adding as many reports as you'd like.
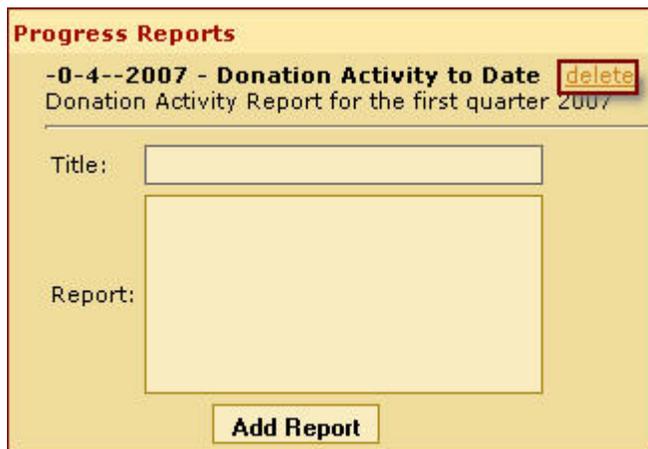
4. To remove a report, select **Delete** next to the item(s) that you would like to erase.

ADDING SPONSORS

Your *ProjectBuilder* account allows you to thank sponsors by adding their logos and web links to your project page.

Under the **Sponsors** heading on the **Modify Project** page,

1. Enter the web address (if applicable) of your sponsor's website.

2. Enter the image URL for your sponsor's logo,

    Or

    Upload the file from your documents by selecting **Browse**.

3. Select **Add Sponsor Link**.

4. Continue adding as many sponsors as you'd like.

To update a sponsor link or image:

1. Enter the web address (if applicable) of your sponsor's website.

2. Enter the image URL for your sponsor's logo,

    Or

    Upload the file from your documents by selecting **Browse**.

3. Select **Update Sponsor Link**.

ADDING A CONVENIENCE CHARGE TO DONATIONS

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

To set the amount of your convenience charge:

1. Click **Convenience Charge** on the *ProjectBuilder* Administration Panel.
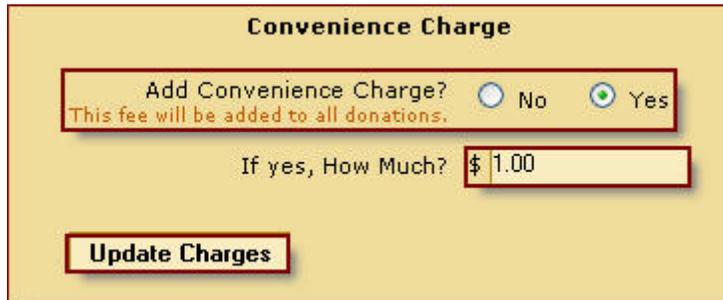
2. Select the **Yes** radio button.

3. Enter the dollar amount of your 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.

Sponsors

Sponsor WebPage Link:

www.testsponsor2.com

Image Link:

/BrightFuture-proj/sponsors/3.jpg

Or

Upload Image: [   ] Browse...

[Update Sponsor Link]

[Delete Link]

4. To remove a sponsor, select **Delete Link** next to the item(s) that you would like to erase.

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 *ProjectBuilder* Administration Panel.
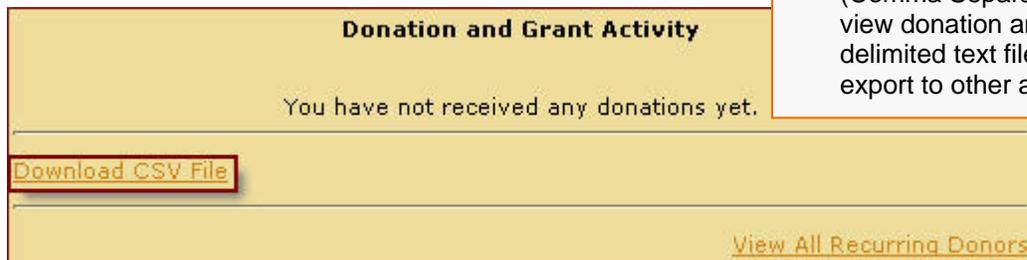
2. Select **Download CSV File** (Comma Separated Values) to view donation amounts in delimited text file form and/or export to other applications.**

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

You are now ready to begin raising money through your *ProjectBuilder* account!

RECEIVING YOUR DONATED FUNDS

Every time a donation is made through ProjectBuilder account, a donation notification email will be sent, complete with the details of the contribution.

Extended Hearts, LLC distributes all funds raised through your ProjectBuilder account, less transaction fees, on the 15th and 30th of each month. If the aggregate amount of donations (less transaction fees) is less than $50 on the 13th, your funds will be distributed on the 30th.

FREQUENTLY ASKED QUESTIONS

What is ProjectBuilder?

ProjectBuilder allows charities, schools, and organizations with or without a web presence to benefit from online donation functionality. Through ProjectBuilder, your group can raise money online for small projects and events, offering a number of valuable, user-friendly backend tools.

What is the cost of ProjectBuilder?

Extended Hearts requires a one-time set-up fee for all ProjectBuilder accounts, with a low monthly service charge. There is also a small transaction fee for all donations made to your ProjectBuilder account.

Does our organization need a merchant account to use ProjectBuilder?

No, you do not need a merchant account to accept payments through your ProjectBuilder account. Extended Hearts processes all credit card payments through our secure server for your convenience.

How many projects can our organization create using ProjectBuilder?

There is no limit to the number of projects you create with your ProjectBuilder account.

How can we modify our organization's information that appears on the project page?

To modify the appearance of your project, log in to your ProjectBuilder account and click the name of the project that you would like to change. To alter any aspect of the project, simply click the "delete" link next to the appropriate section, or re-type the information in the text fields.

How do we change your login information?

To change your Username and Password, log in to your ProjectBuilder account and click the "Log-in Info" tab under the Administration Panel. Type in your new Password and/or Username, and click "Update Log-in Info".

How do we make changes to our billing information?

To make changes to your billing information, log in to your ProjectBuilder account and click on the Billing Information tab under the Administration panel. Make any necessary modifications and click "Update Billing".

Can a donor make recurring and/or scheduled gifts through ProjectBuilder?

Yes, donors can elect to make weekly, monthly, or yearly payments to your organization through ProjectBuilder.

How and when is our organization notified of contributions made through our ProjectBuilder account?

Organizations are notified of contributions made through their ProjectBuilder accounts via email immediately after payments are processed.

Will our donors receive receipts for their contributions?

All donors receive tax ready receipts, payment confirmations, and a customized Thank You message from your organization upon contributing to your cause.

How do we receive the funds raised through our ProjectBuilder account?

Each month, Extended Hearts distributes checks to individuals/organizations that have raised a net total of $50 or more in donations, less company transaction fees.

Can we include our sponsors on our ProjectBuilder page(s)?

Yes, Extended Hearts allows you to acknowledge sponsors on your ProjectBuilder page(s) by inserting their logo, description, and an external link to their websites.

My donor's company can provide a matching gift, what do I do?

If your donor's company runs a matching gift program, have your donor make sure that their company pitches in and matches their contribution.

Encourage your donor to ask their company's Human Resources Department for instructions and/or forms for the matching gift program, and follow through with all steps of the process.

After the donation is processed, the donor will receive a Donation Acknowledgement email from Extended Hearts, which should be sufficient proof for the company. If the company needs more proof of donation, they should be instructed to contact your organization or charity directly