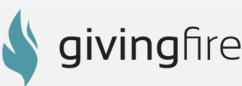givingfire

Quick Start Guide

LAST UPDATED ON FEBRUARY 24, 2015

We update this document periodically to reflect new updates and features on the GivingFire platform. To download the most recent copy of this document, please visit http://helpdocs.givingfire.com.

WELCOME TO GIVINGFIRE!

We're excited to work with you and your organization! We've created this packet as a guide for you as you get started with us and as a resource for questions that you may have further down the road.

To begin, you've just received an email verifying that your account has been activated. What's next?

GETTING STARTED

CREATING YOUR FIRST FUND(S)

1. From the administrative console, click **Settings** in the top navigation bar, then click **Funds.**
2. Press the **New Fund** button.
3. Enter the name of your new fund, and select **Active** in the dropdown. Press the **Create Fund** button to save your fund.
4. To change the order in which funds appear, simply select the icon to the left of the fund in the funds list, and drag the fund to the correct placement.
5. For record-keeping purposes, funds can not be deleted but they can be inactivated.
   a. Select the **Edit** icon (pencil symbol) to the right of the fund.
   b. Change the state from **Active** to **Inactive**
   c. Press the **Update Fund** button to save your fund.

SETTING UP YOUR ADMIN TEAM

1. From the administrative console, click **Settings** in the top navigation bar, then click **Users.**
2. Press the **New User** button.
3. Enter the required information and select the **Admin** checkbox. Press the **Create Account** button to add that user as an administrator. An email will be sent to the user instructing him or her to verify their email address.

Note: GivingFire users can have admin access, which gives them the ability to change settings for both donors and the GivingFire app. If a user does not have admin access enabled, then they have read-only access and cannot change settings.

FINDING ADDITIONAL HELP

If you ever need additional help, try our support portal at https://givingfire.freshdesk.com. Our support portal has an ever-growing repository of instructional articles, helpdesk entries, and downloadable resources. In addition, you can also open up support tickets and talk with an account manager or technician. We're here to help!

SITE CUSTOMIZATION

We've built our donation pages to adapt to your organization's branding, while keeping a flexible layout that adapts to all screen types. You don't need to know HTML - our backend makes customization easy. To customize your giving pages, click Settings in the top navigation bar, then click Organization.

NAME & LOGO

In this section, you can either enter your "Doing Business As" name (i.e. the name your donors will recognize you by) or you can upload your logo. This information will be displayed at the top of your payment page and will be the first thing your donors will see.

Note: When uploading your logo, allowed file types are .jpg, .png, and .gif, although we recommend a high-quality PNG with a transparent background. The maximum width is 880px, and the max height is 120px. If your logo is larger, we'll resize it to the allowed size while retaining the aspect ratio. If you'd like to center the logo on your donation page, create an 880px by 120px image with the logo centered.

WEBSITE BRANDING & INFORMATION COLLECTION

Changing Your Background: We have a default "static" background for all new donation pages, but you can use your own. Generally, we recommend you enter in the URL of your main website's background so the two match. The background automatically tiles, and if the background is partially transparent (like our default background) then you can change the color with the Background Color selector below.

Collecting Additional Information: There are a few other settings you can enable for your donation page which will allow you to collect more information. Some organizations want a quick, compact donation form, while others want to collect as much information as possible. You can choose based on the needs of your particular organization:

Contact Information: Simple or Full
A simple contact information form only asks for the donor's full name, phone, and email. A full contact information form also asks for the donor's address. We recommend full donor contact information for tax-reporting purposes.

Comments: Hide or Show
This adds an additional form field where donors can write personal notes attached to their donation. **Be careful with this option.** GivingFire does not recommend you use donation pages for non-donation payments; i.e., accepting event registration fees. This interferes with our tax-reporting functionality and may require you to do additional compliance on your tax reporting.

KIOSK BRANDING

Splash Image: The splash image is a full-screen image that displays while the kiosk is "at rest"; that is, before the donor starts a donation. It should be a simple image that displays your organization's logo prominently. The image should be a PNG or JPG image exactly 980px by 735px. Note that a "Give" button is automatically placed on the splash image 550px down, centered in the middle of the screen.

Kiosk Logo: The kiosk logo is located at the top-left corner of the screen during the donation process. It should be a transparent PNG sized 30px high and no more than 300px wide.

Thanks for reading.
We're excited to serve you!

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