givingfire

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Reference 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.

THE ADMIN CONSOLE

We've created this packet as a general reference for you and the other administrators in your organization. Our goal is to provide an overview of the administrative console and how to use it to manage and track your donations.

As always, if you ever have any questions, contact your **GivingFire account manager** or write us at **support@givingfire.com**.

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.

FUNDS

WHAT ARE FUNDS?

Funds are a way for your organization to allow giving to be set aside for a specific use. For example, a church might have a general tithe fund where most donations go, and a special fund for a new building campaign. You can have as many funds as you'd like, and every organization starts out with one default fund (it has the same name as your organization).

Donors have the option to give to as many funds as they'd like in the same donation. These funds are compiled into one transaction and later split into funds via reporting. In other words, if a donor sets up a donation for $50 to both a General Fund and a Building Fund, then a single $100 transaction is processed, not two $50 transactions.

HOW DO I DELETE A FUND?

You can't delete a fund - only change it to inactive. Inactivating the fund will prevent the donor from viewing and donating to the fund, while saving the donation records from previous donations in the backend. You can change a fund to inactive by pressing the **Garbage** icon on the far right side of the fund list, or by editing the fund and manually selecting inactive.

HOW DO I VIEW REPORTS ON A GIVEN FUND?

The simplest way to see how much a fund has made over its lifetime is:

1. From the administrative console, click **Settings** in the top navigation bar, then click **Funds**.

For an in-depth look at individual funds:

1. From the administrative console, click **Donations** in the top navigation bar, then click **Transactions**.
2. In the **Filter Results** box to the left, choose the **Funds** you wish to view.
    To select more than one fund, hold Ctrl while clicking multiple funds from the list.
3. Click **Apply Filter** to check the results.

DONORS

WHAT ARE DONOR ACCOUNTS?

Donors have the ability to create accounts to store information, view donation history, and modify or fix recurring donations. This is a built-in feature of GivingFire and can't be turned off, although using accounts is completely optional for the donor. Donor accounts can be accessed through the donation page, via a navigation bar at the top of the screen.

Once a user logs in, they'll see a customized dashboard for their account. This is different from the administrative dashboard - they'll only have access to their donations to your organization.

MANAGING DONORS

Admins have the ability to view and edit donors through the GivingFire backend. In the top navigation, press **Donors** to view a list of donors, sorted alphabetically by last name. If you click on the name of a donor, you can see his detailed records.

From the **Donor Detail** page, you can see the full name, email, phone, and address (if applicable) of the donor, along with their full giving history. You can view a more detailed view of a donor's individual donation by pressing the **View** link for that specific donation.

EDITING DONOR INFORMATION

From the **Donor Detail** page, press the green **Edit** button at the top-left of the page. This will allow you to edit donor information.

EDITING INFORMATION

The form fields to the left of the page contain the contact information for this donor. Enter or change the information and press **Update Information** to save.

EMAIL ADDRESSES

Contact Email Address at the top-right of the page indicates where donation receipts are sent. Donors can have multiple email addresses, but receipts are only sent to one location. In the **Email Addresses** section in the middle-right, admins can add or remove emails associated with donors. Be careful - if an admin adds an email to a donor's account, then all donations made with this email will be associated with this donor. If the donor has an account, they can sign in with any valid email.

VERIFYING EMAIL ADDRESSES

If a user has been unable to verify their email, an admin can manually re-send a verification email from this page by pressing the **Resend Verification Email** button.

OTHER DONATIONS

OFFLINE DONATION ENTRY

GivingFire's offline donation tracking allows your organization to track cash and check donations made in-person, enter them into the system, integrate them into your donor database, and track batch deposits in the bank. Between GivingFire's online and offline tracking, your organization can track all donation income and create complete tax records for your donors. This section will show you how to enter in an offline donation batch into GivingFire.

1. From the administrative console, click **Donations** in the top navigation bar, then click **Offline Batch Entry**.
2. Select **Check** or **Cash**.
3. Enter **Ref. #** (e.g. check number - this is optional)
4. Enter **Donor Name**.
   If the donor has made prior donations, GivingFire will prompt you to select their name here.
5. If the donor has specified a **Fund** for the donation, you can indicate that here. If they have indicated that they would like to split the donation between two funds, simply click the **+** next to the fund or press Enter and enter the various amounts for each fund.
6. To add additional donations, click the **+** to the left or press Tab and repeat the process for as many donations as you need to.
7. When you are finished, you can name the **Offline Batch** (e.g. 11 am Sunday Service) under Batch Information.
8. Set a **Deposit Date & Time** to record when these donations were deposited to your bank account. This can be backdated. If you don't set a deposit time, you can edit the time later, which will change the batch status from pending to deposited.
9. When you have entered all the donations you wish to, click **Submit Batch** to add the donations to your records.

MANUAL DONATION PROCESSING

We understand that not all of your donors will want to process their donations online. In some cases they may ask you to process a donation for them, or you may enter in a new recurring donation from one of our offering envelopes. To do this for them:

1. From the administrative console, click **Donations** in the top navigation bar, then click **Manual Entry**.
2. Follow the indicated steps.
3. Click **Donate** once.

Note: For security measures, you should never store donor payment information electronically. If donors wish to have you process their payments, you should collect the information physically and either destroy it immediately once the donation has been created, or store it in a safe where access is logged and monitored.

REPORTING

DASHBOARD

When you first log into the administrative console, the first thing you see is the **Dashboard**. The dashboard is meant to show you a quick visual summary of recent donations. In the upper right corner, you can select your timeframe: the last month, week, or day. Month is selected by default. The total donation amount for that time period is shown on the left along with the total donation count, amount of donations made by first-time donors, and increase in giving from this time last month/week. The graph to the right shows the amount given per day - blue is the current time frame, and grey is the preceding time frame.

The three pie charts show the statistical breakdown of your donations. The first pie chart shows how many donations were made by online/mobile, offline, and kiosk. The second pie chart shows the split between one-time donations and donations made as part of a recurring schedule. Finally, the third pie chart shows the split between donations made by repeat donors and donations made by first-time donors.

Last of all, underneath the other graphs the ten most recent donations (successful or not) are shown.

ACTIVITY

Most reports center around the donations - what came in, what recurring transactions are coming in, and so on. The activity feed is different in that it centers around the donors and their activity on the site. We want to help you do more than just track donations, but use giving activity in a way that helps you grow your organization. When someone gives for the first time or moves from sporadic one-time gifts to recurring gifts, that's more than an administrative action – *that is a donor coming alongside your organization and joining your mission.* The activity feed shows:

1. A new donor (When a new donor enters the system, either through giving as a guest or creating an account)
2. First-time single donation (When a donor gives a one-time gift for the first time)
3. First-time recurring donation (When a donor gives a recurring gift for the first time)
4. Donation error (When a donor unsuccessfully tries to make a donation)

Activity is broken down by day and can be filtered to show a custom date range.

RECURRING

The recurring transaction report (found under **Donations** > **Recurring**) is built to help you view recurring donations and predict monthly income. Recurring donations are listed in order by date created, from most recent to least recent. You can filter donations created inside a certain date range, and further filter them by state and fund.

RECURRING STATES

Pending – the donation has been scheduled but not verified by the bank yet. Generally, this is rare since banks usually verify a recurring donation instantly.
Scheduled - this is a normal recurring donation. Everything is OK and the donation is expected to run as normal.
Stopped - the recurring donation has been stopped by the donor, or as a result of a canceled/expired credit card.
Completed - this recurring donation was set to end after a certain amount of time, and has successfully done so.

You can also view a given recurring donation by clicking the View button on the far right of the individual recurring donation record.

RECURRING DONATION DETAILS

If you click the **View** button for a single recurring donation, you're taken to a Recurring Donation Detail page. This page shows details about this recurring donation such as history, amount, and fund, as well as the ability to stop the donation.

Donation Details

There are several items on the donation detail page that might help admins assess, and if needed, repair a recurring donation. The left side of the screen should show donor information, and the upper right side of the screen show the fund breakdown as well as the recurring schedule. The bottom of the screen shows the history of this recurring donation. Clicking on an individual donation will expand to show transactions (how many times the donation was tried - successful donations will only have one, whereas unsuccessful donations might have more). Further clicking on transactions will show the details of the transaction from the bank. This will include any error messages from the bank.

Stopping a Recurring Donation

To stop a recurring donation from the detail page, press the **Stop** button in the top-right corner of the detail page. After the confirmation, this will permanently stop all future donations.

Refunding a Specific Donation

To refund a donation in a recurring profile, find the donation in the history, and press the **Refund** link at the far right of the donation.

TRANSACTIONS

The transaction report (found under **Donations** > **Transactions**) is GivingFire's primary way of displaying detailed giving data. It shows all transactions made on the site, whether or not the donation was successful, and can be used to view or export data and filter with a number of options. Here's a brief explanation of all of the different options:

DATE RANGE

Start Date and **End Date** allow you to set a specific timeframe for the report. **Start Date** begins at the beginning of the day, and **End Date** ends at the end of the day - so selecting the same day will pull donations made only on that single day.
You can also choose **Created Date** or **Settled Date**. **Created Date** sorts donations by when the donation was made. **Settled Date** sorts donations by when the donation was cleared in the bank. **Settled Date** is best for reconciling donations with the bank.

DONATION METHOD

Online & Offline Transactions shows all donations recorded in GivingFire.
Online Transactions only shows online donations processed through GivingFire - online, mobile, or tablet transactions.
Offline Transactions only shows offline donations recorded in, but not processed through GivingFire.
Offline Batches (legacy) shows offline batches recorded in GivingFire, but not the offline donations that make up the batch.
All Transactions & Batches (legacy) shows all donations and all batches recorded in GivingFire.

DONATION TYPE

Online Only shows only online (desktop/mobile) donations given through the main donation page.
Kiosk Only shows only kiosk donations given through the card-present iPad kiosk.

FREQUENCY

One-time Only shows only one-time donations.
Recurring Only shows only donations made as part of a recurring schedule.

PAYMENT TYPES

Credit/Debit Only shows only traditional credit/debit transactions.
ACH Only shows only ACH transactions.

TRANSACTION TYPES

Charge - The standard transaction type, where money is transferred to your organization's account.
Credit - A refund (partial or full), where money is transferred from your organization's account.
Void - Where a transaction is canceled before the 24-hour batch period.

RESULTS

Approved - Successful donations only.
Declined - The card/check information was correct, but the bank declined the transaction. Usually this is an expired/cancelled card.
Error - The card/check information was (usually) incorrect, and could not be processed.

TRANSACTION STATES

Queued - This transaction is in the system, but not sent to the bank yet. This is rarely seen since we process the transaction almost immediately.
Pending - This is a card transaction that has been approved but not processed in the daily batch yet.
Submitted - Same as pending, but for ACH/check transactions.
Funded - This is an ACH transaction that has been batched, but not fully settled by the bank.
Settled - This donation has been completed and is deposited in your bank account.
Voided - This is a check transaction that has been voided.

FUNDS

Shows all of your funds. You can run the report on all of your funds, one of your funds, or a selection of funds.

Finally, you can choose to download your results by CSV for export into a third-party system like Quickbooks, or you can view inline by pressing **Apply Filter**.

Note: All of the select boxes (that is, not the dropdowns) can select more than one option by holding down CTRL while clicking on multiple options. For example, you can select both Credit and Void.

DONATION DETAILS

If you click on the **View** button for a single donation, you're taken to a Donation Detail page. This page shows details about this donation such as amount and fund, as well as the ability to refund the donation.

Donation Details

There are several items on the donation detail page that show specific information about that donation. The left side of the screen should show donor information, and the upper right side of the screen show the fund breakdown. The bottom of the screen shows the result of the donation. Clicking on a donation result will expand to show transactions (how many times the donation was tried - successful donations will only have one, whereas unsuccessful donations might have more). Further clicking on transactions will show the details of the transaction from the bank. This will include any error messages from the bank.

Refunding a Donation

To refund or void a donation, click **Refund** (or **Void**, if the transaction has not been settled yet) at the far right of the donation in the bottom right of the screen.

ANNUAL

Annual reports are built to download giving information for tax reporting purposes. GivingFire's annual statement section has the ability to generate CSV exports with a year's worth of data - donor and donation history alike - or year-end tax PDF statements, customized for your entire organization with just a few clicks. From there, you can archive and mail out statements or have GivingFire do it for a nominal fee. To get the most out of the statement generator, we recommend two things:

1. Your organization uses GivingFire for all donation records, including offline (cash/check) giving.
2. Your organization requires an address on the online giving page, or your administrators keep the donor database up-to-date in GivingFire.

GENERATING CSV ANNUAL EXPORTS

1. From the administrative console, click **Donations** in the top navigation bar, then click **Annual**.
2. Select the year you'd like a report for. (If you choose the current year, the report will pull up everything from Jan. 1 to the current date.)
3. Select your date type: **By Created/Settled** date for online transactions, and **By Created/Deposited** date for offline transactions.
    a. **Created** date selects records that were made (but not necessarily settled or deposited) in that calendar year. It's useful if you want to include last minute transaction made at the end of the year.
    b. **Settled/Deposited** date counts donations by when they were settled in the bank, not entered into the system. If your organization has backdated offline batches, you'll probably want to select this.
4. Click **Download CSV** to export a yearly report.

This report will include donor information including address (if you've decided to include it on the donation page) as well as each successful donation made to your organization.

GENERATING PDF ANNUAL STATEMENTS

1. From the administrative console, click **Donations** in the top navigation bar, then click **Annual**.
2. Select the year you'd like a report for. (If you choose the current year, the report will pull up everything from Jan. 1 to the current date.)
3. Fill out the input fields. All fields are required to generate the PDFs.
    a. **EIN Number** - this is the federal tax ID that identifies your organization's non-profit status.
    b. **Organization Address** - this is a two-line legal address for your organization. Don't include your organization name (that's added automatically).
    c. **Legal Disclaimer** - this is the paragraph section that goes underneath the donation line items. Change this paragraph to suit your organization's needs - if no goods or services were provided (other than intangible religious benefits), then put that down. You can also add in personal notes too (thanks for giving to our church - your donation means a lot to us, etc.)
    d. **Signor's Name and Title** - e.g. John Smith, CFO
    e. **Remove organization header** - we'll automatically add in your organization address in the upper-left corner spaced for envelope windows, but if you're using custom letterheads then check this box to leave that out.
4. Select your date type: **By Created/Settled** date for online transactions, and **By Created/Deposited** date for offline transactions.
    a. **Created** date selects records that were made (but not necessarily settled or deposited) in that calendar year. It's useful if you want to include last minute transaction made at the end of the year.
    b. **Settled/Deposited** date counts donations by when they were settled in the bank, not entered into the system. If your organization has backdated offline batches, you'll probably want to select this.
5. Once you've customized your PDFs, press **Download PDF** to generate your PDFs. You'll receive a ZIP file containing a master PDF containing all records in one PDF (for easy printing) as well as a folder containing individual donor PDFs.

Note: For security purposes, the PDFs are not editable after they've been generated. If your organization has incomplete records (as defined above) then GivingFire will generate statements as best as it can. You also have the option of downloading the annual information as a CSV and formatting the information from there.

MAILING PDFS

We strongly recommend mailing physical statements to donors rather than emailing them. The PDFs are generated with the organization and donor address in the correct location for a standard 10#, double-window envelope. If you'd like assistance mailing statements, contact us and we can have the statements printed and mailed for a nominal fee.

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

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