

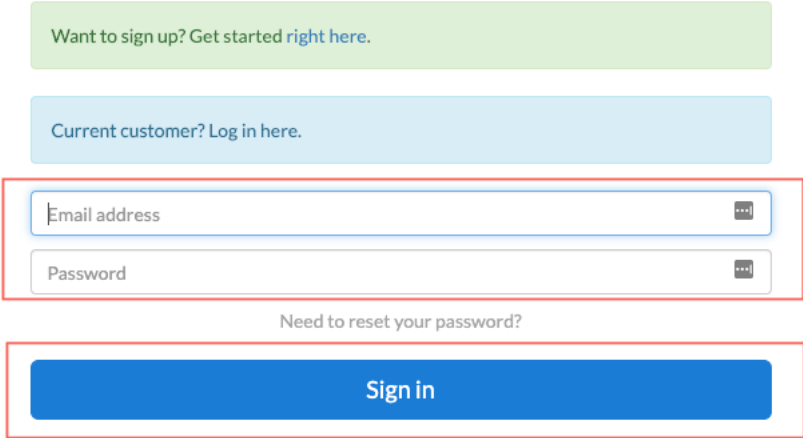


FACTS Giving

Supporting NCEA's National Day
of Giving

Table of Contents

<i>Login</i>	2
<i>You Dashboard Overview</i>	3
<i>Customizing your Appeal</i>	4
<i>Appeals – How to Share</i>	8
<i>Transactions - Viewing</i>	9
<i>Transactions – Manual Entry</i>	10

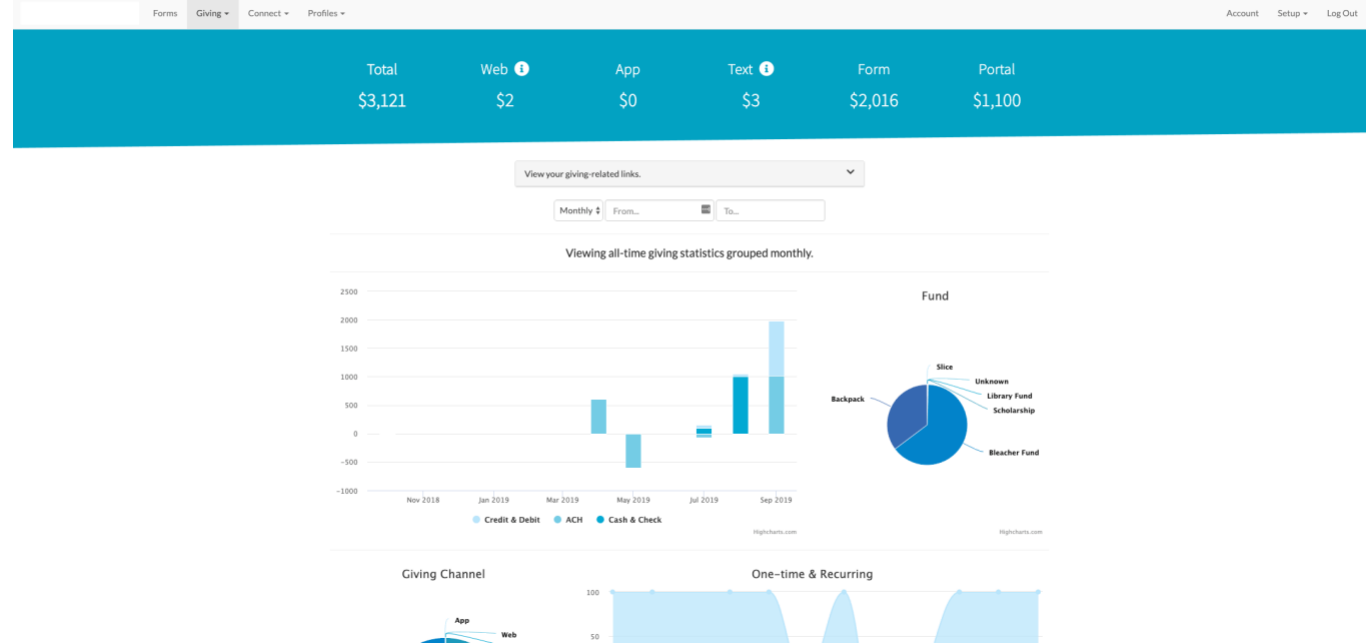
Login	1.0
<p>1. Go to https://factsmgtadmin.com</p> <p>2. Login with the user name and password that were sent to you by FACTS</p> <p>If your password has expired: https://factsmgtadmin.com/login/reset</p> <p>3. Click 'Sign In'</p>	 <p>Want to sign up? Get started right here.</p> <p>Current customer? Log in here.</p> <p>Email address</p> <p>Password</p> <p>Need to reset your password?</p> <p>Sign in</p> <p>Continued use of the service constitutes an agreement to the terms of service.</p>

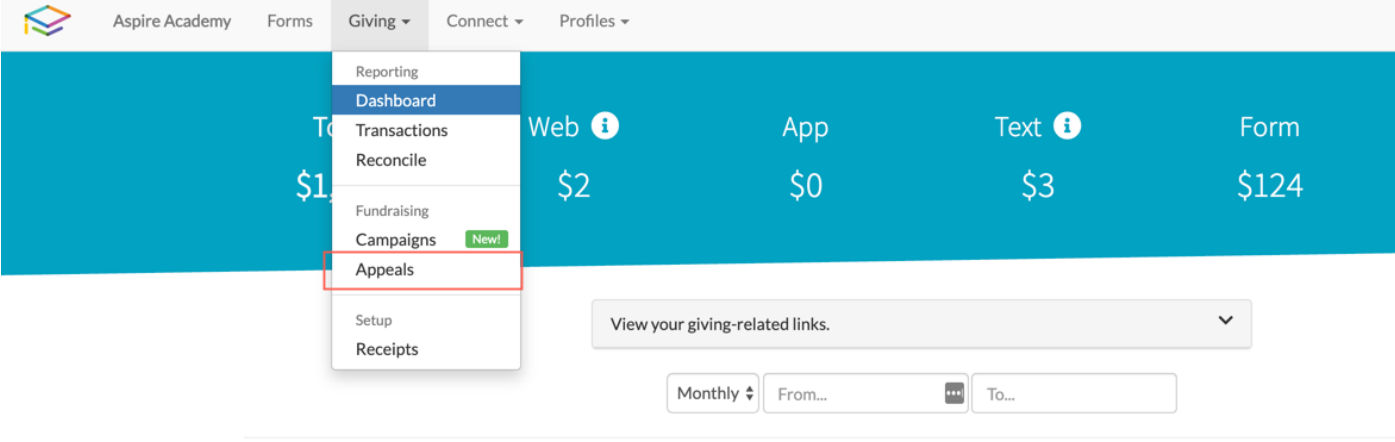
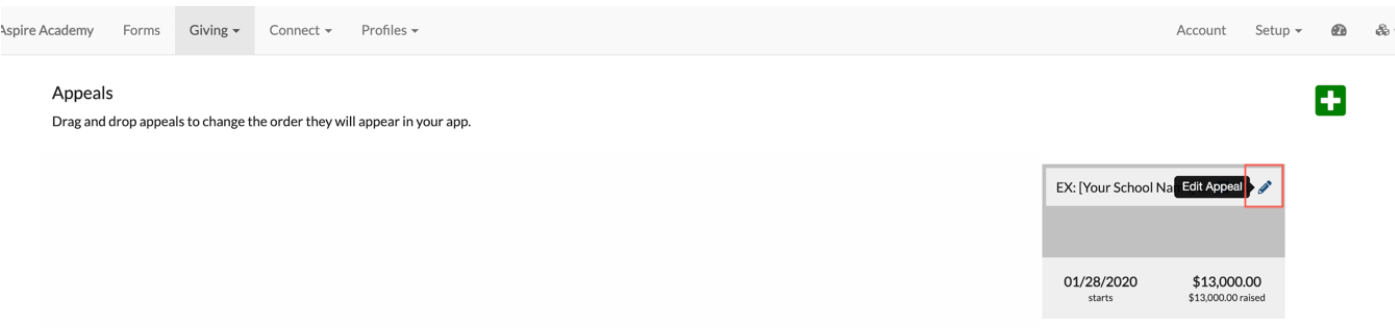
You Dashboard Overview

On this page, you are able see a quick snap shot of how your Day of Giving Appeal is doing.

For the National Day of Giving, some of these areas will be reduced.

2.0



<p>Customizing your Appeal</p>	<p style="text-align: right;">3.0</p>
<ol style="list-style-type: none"> 1. Click on the Giving tab 2. Choose the Appeals option 	 <p>The screenshot shows the 'Giving' dropdown menu open. The 'Appeals' option is highlighted with a red box. Other options include Reporting, Dashboard, Transactions, Reconcile, Fundraising, Campaigns (with a 'New!' badge), Setup, and Receipts. The background shows a dashboard with various giving-related statistics like 'Web \$2', 'App \$0', 'Text \$3', and 'Form \$124'.</p>
<p>You should see one Appeal</p> <ol style="list-style-type: none"> 3. Hover over it, and click on the Pencil Icon 	 <p>The screenshot shows the 'Appeals' page. It includes a header with 'Aspire Academy', 'Forms', 'Giving', 'Connect', and 'Profiles'. Below the header, there's a section titled 'Appeals' with the instruction 'Drag and drop appeals to change the order they will appear in your app.' A single appeal entry is visible, showing '01/28/2020 starts' and '\$13,000.00 \$13,000.00 raised'. An 'Edit Appeal' button with a pencil icon is highlighted with a red box.</p>

4. Once in the Appeal, fill out the following fields:

a. Title* - **your school name or what you want to call this page**

b. About – why you are requesting donations and participating in NDOG

c. More Details

Note: We also suggest putting in your known address

d. Goal

Note: All other fields have been pre-filled by our FACTS team for you.

Giving > Appeals > Create Appeal

Basic Info

Title (Required) 100 characters left

About 200 characters left

More Details 1000 characters left

Fund Info

Campus (Required)	Fund (Required)	Goal	Manual Adjustment ⓘ
<input type="text" value="Select Campus"/>	<input type="text" value="Select Fund"/>	\$ <input type="text" value="100.00"/>	\$ <input type="text" value="100.00"/>

Dates ⓘ

to

Allow Recurring Gifts

ON OFF

Gifts totaling \$0 have been processed.
With no manual adjustment, the total raised is \$0.

5.0

5. Click on 'Choose file' to upload your school's logo

Note: Your logos must be in PNG or JPEG format (aka file format) and sized to 340x100 pixels.

If you previously provided your school logo, it may be shown here. If not, a placement logo will be shown.

You may upload additional logos for the Footer.

6. Click on 'Choose file' to upload your school's primary image.

Note: Your images need to be in PNG or JPEG format (aka file format) and sized to 430 x 360 pixels.

This is the first image the donors will see when visiting your page. Images that you upload will rotate.



Logos Header 340 x 100 (PNG or JPEG)

Logo 1 (Required)

Choose File



Remove

Logo 2

Choose File

Logos Footer 155 x 75 (PNG or JPEG)

Logo 3

Choose File

Logo 4

Choose File



Image Carousel 430 x 360 (PNG or JPEG)

Image 1 (Primary)

Choose File

Image 2

Choose File






Image 3


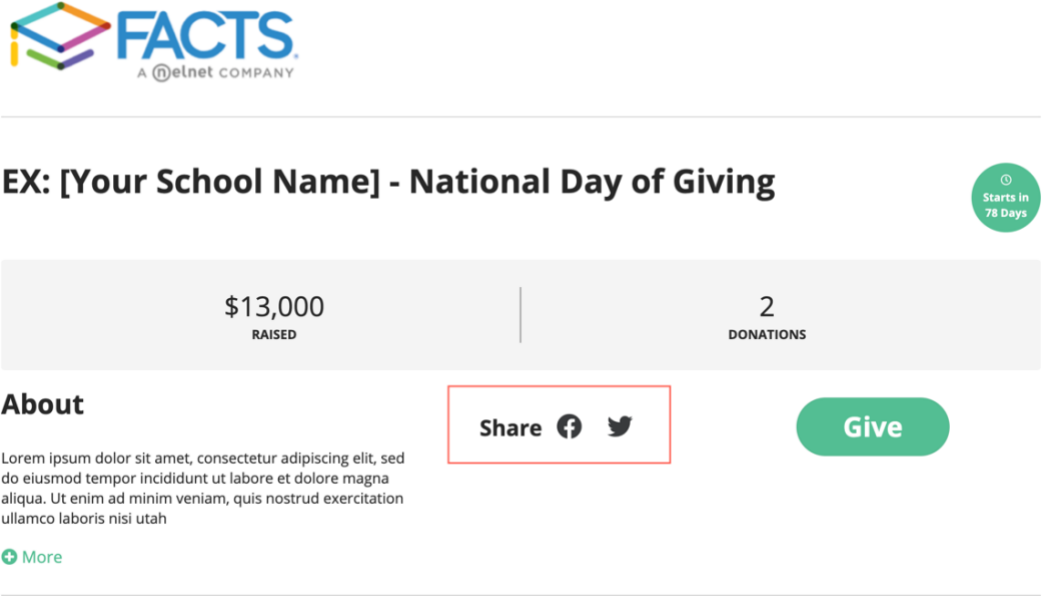
Choose File

Delete Appeal

Cancel

Save Changes

<p>7. Once you have uploaded all your logos and school images.</p> <p>Click 'Save Changes'</p> <p>Congratulations you are</p> <p>DONE!</p> <p>On Jan 28th don't forget to share this Appeal page on your Facebook &/ or Twitter page!</p>	<p style="text-align: center;">6.0</p> <div style="border: 1px solid #ccc; padding: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; padding: 5px; width: 100px; text-align: center;">3</div> <div style="border: 1px solid #ccc; padding: 5px; width: 100px; text-align: center;">4</div> </div> <div style="margin-top: 20px;"> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 45%;"> <p>Logo 3</p> <input type="text" value="Choose File"/> No file selected </div> <div style="width: 45%; text-align: right;"> <p>Preview</p>  <p>Remove</p> </div> </div> <div style="margin-top: 10px;"> <p>Logo 4</p> <input type="text" value="Choose File"/> No file selected </div> <div style="width: 45%; text-align: right;"> <p>Preview</p>  <p>Remove</p> </div> </div> <div style="margin-top: 20px;"> <p>Image Carousel 430 x 360 (PNG or JPEG)</p> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 45%;"> <p>Image 1 (Primary)</p> <input type="text" value="Choose File"/> No file selected </div> <div style="width: 45%; text-align: right;"> <p>Preview</p>  <p>Remove</p> </div> </div> <div style="margin-top: 10px;"> <p>Image 2</p> <input type="text" value="Choose File"/> No file selected </div> <div style="width: 45%; text-align: right;"> <p>Preview</p>  <p>Remove</p> </div> <div style="margin-top: 10px;"> <p>Image 3</p> <input type="text" value="Choose File"/> No file selected </div> <div style="width: 45%; text-align: right;"> <p>Preview</p>  <p>Remove</p> </div> </div> <div style="margin-top: 20px; display: flex; justify-content: space-between; align-items: center;"> <div style="width: 30%;"><input type="button" value="Delete Appeal"/></div> <div style="width: 30%; text-align: center;"><input type="button" value="Cancel"/></div> <div style="width: 30%; text-align: right;"><input type="button" value="Save Changes"/></div> </div> </div>
--	---

Appeals – How to Share	7.0
<ol style="list-style-type: none"> 1. From the Giving drop down, click on Appeals 2. Click on the 'arrow' icon, on the Appeals to view it 	
<ol style="list-style-type: none"> 3. Click on either the Facebook or Twitter icons, to open those apps and share this Appeal. 	

Transactions - Viewing

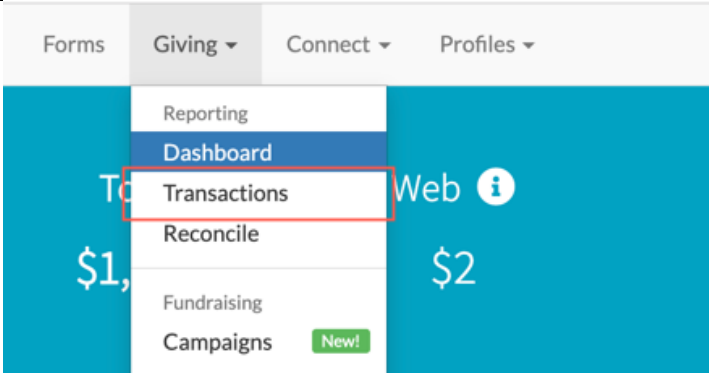
1. From the Giving drop down, click on 'Transactions'

You can use filter(s) to find and export specific transactions more easily.

Export transactions for your reporting needs.

Note: When you export transaction, the donor's associated addresses will also be shown on the export document.

8.0



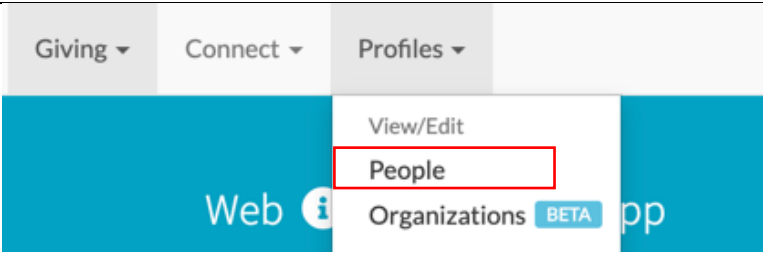
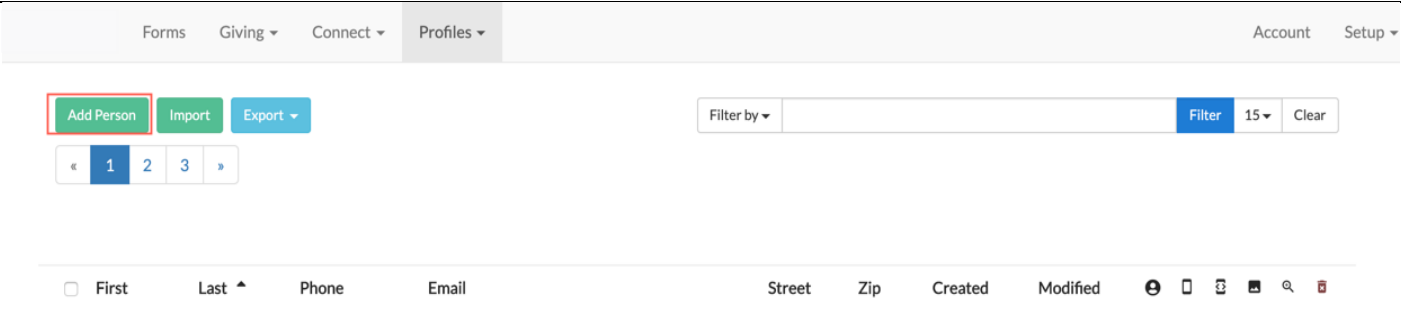
Transactions

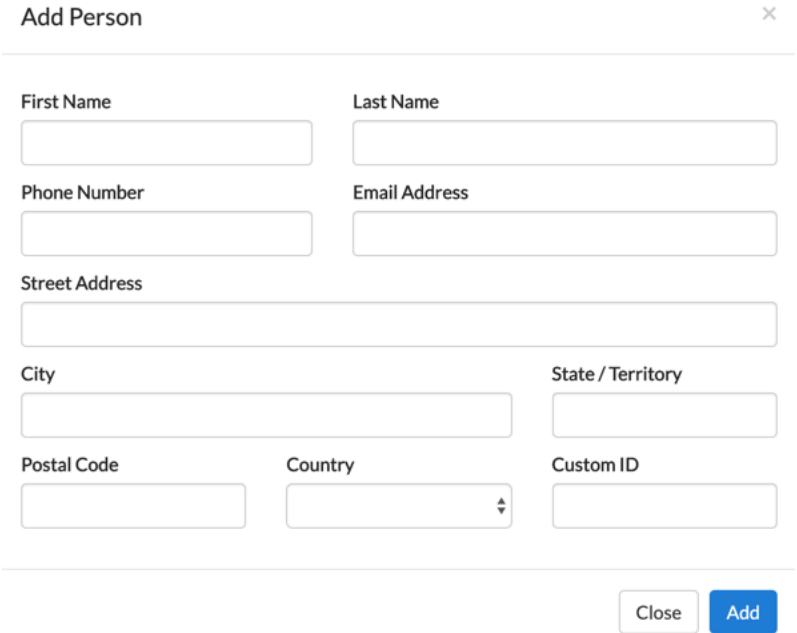
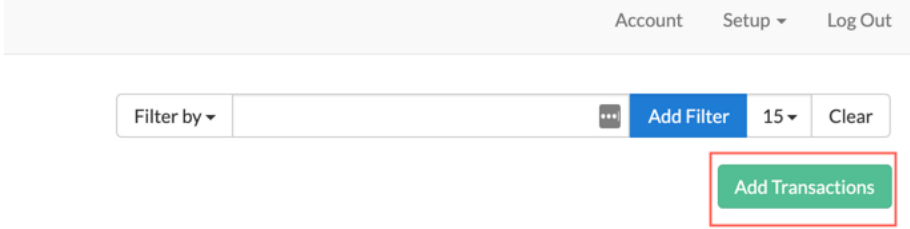
Full listing of all transactions powered through any channel. For detailed assistance, PaymentSpring can be reached by email or 1.866.431.4637.

Filter by ▼

Export

Initiated Date	Frequency	Transaction ID	Batch ID	Settlement	Source	Organization Name	First Name	Last Name	Email	Amount	Type	Appeal	Pledge	Fund	CCB	Fees	Refund	Del
11/04/2019 3:28 PM	Daily	ef70a6d38c20435b427b481ac037e8d	A-20191104	2019-11-04	Web	Test	Student		joeltest01@Aware3.com	\$1.00	Credit			General Fund (CCB #1)				
11/04/2019 3:09 PM	Daily	cab25768b3543ee9502b2c866bcdba9	A-20191104	2019-11-04	Web	Gweneth	paltro		joeltest09@Aware3.com	\$1.00	Credit			General Fund (CCB #1)				
11/04/2019 2:41 PM	Daily	fc78f92d54b34eb1aa3a07db2f83af91	A-20191104	2019-11-04	Web	Morgan	Stark		joeltest03@Aware3.com	\$1.00	Credit			Building Fund (CCB #12)				
11/04/2019 1:42 PM	Daily	b0743fa2276b48f8fb1a6f995e161c	A-20191104	2019-11-04	Web	Test	Soto		joel@Aware3.com	\$10.00	Credit			General Fund (CCB #1)				
11/04/2019 12:33 PM	Daily	bf123a516e124853b6baaa190a5229f	A-20191104	2019-11-04	Web	Jason	Sanz		joeltest02@Aware3.com	\$1.00	Credit			General Fund (CCB #1)				
11/03/2019 3:28 PM	Daily	119573a4767434990c70edae0dadcf	A-20191103	2019-11-03	Web	Test	Student		joeltest01@Aware3.com	\$1.00	Credit			General Fund (CCB #1)				
11/03/2019 3:09 PM	Daily	2c92462c5bfa41c5b8f30cc4bfc54d	A-20191103	2019-11-03	Web	Gweneth	paltro		joeltest09@Aware3.com	\$1.00	Credit			General Fund (CCB #1)				
11/03/2019 2:41 PM	Daily	119bcbaad0311413692de103753c5d7b6	A-20191103	2019-11-03	Web	Morgan	Stark		joeltest03@Aware3.com	\$1.00	Credit			Building Fund (CCB #12)				
11/03/2019 1:42 PM	Daily	e805ba8701a443f872a8f8c031f8f99	A-20191103	2019-11-03	Web	Test	Soto		joel@Aware3.com	\$10.00	Credit			General Fund (CCB #1)				
11/03/2019 12:33 PM	Daily	3891ec3e9cc545309938a6d80311b952	A-20191103	2019-11-03	Web	Jason	Sanz		joeltest02@Aware3.com	\$1.00	Credit			General Fund (CCB #1)				
11/02/2019 4:28 PM	Daily	006ec14088724528814fba21cc57e0e1	A-20191102	2019-11-02	Web	Test	Student		joeltest01@Aware3.com	\$1.00	Credit			General Fund (CCB #1)				
11/02/2019 4:09 PM	Daily	941033305c814addbfcaad6f08be7501	A-20191102	2019-11-02	Web	Gweneth	paltro		joeltest09@Aware3.com	\$1.00	Credit			General Fund (CCB #1)				
11/02/2019 3:41 PM	Daily	0cd56afd9634ac7a0ca4d941a14347d	A-20191102	2019-11-02	Web	Morgan	Stark		joeltest03@Aware3.com	\$1.00	Credit			Building Fund (CCB #12)				
11/02/2019 2:42 PM	Daily	d06976f1c4024f88273b09c2f1b72bf	A-20191102	2019-11-02	Web	Test	Soto		joel@Aware3.com	\$10.00	Credit			General Fund (CCB #1)				
11/02/2019 1:33 PM	Daily	6426a0c1245640dcae318c6af4f2bba	A-20191102	2019-11-02	Web	Jason	Sanz		joeltest02@Aware3.com	\$1.00	Credit			General Fund (CCB #1)				

<p>Transactions – Manual Entry</p>	<p>2.</p>
<p>First, create a Profile, so you can associate the gift to a person</p> <p>1. Go to Profiles and then People</p>	
<p>2. Click on 'Add Person'</p>	

	3.
<p>3. Fill out the following fields:</p> <ol style="list-style-type: none"> First Name Last Name Phone Number Email Address <p>4. Click 'Add'</p>	
<p>5. Go to the Giving tab and then into the Transactions page (Giving tab – Transactions)</p> <p>6. Click on 'Add Transactions'</p>	

	4.
<p>7. On the New Check or Cash Transaction page, fill out the following fields:</p> <ol style="list-style-type: none"> Choose: Check or Cash Enter Amount Ensure the date is correct Look Up: Who made this transaction – lookup Choose: the Appeal button Search for the Title for the NDOG Appeal page. Create Transaction <p style="text-align: center;">DONE!</p> <p>Note: Your manual transaction will now be listed on the Transactions page and be reflected in the Appeal information.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <h3 style="text-align: center;">New Check or Cash Transaction ×</h3> <hr/> <p>What type of transaction are you recording?</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-right: 10px;">Check</div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Cash</div> <p>How much was this transaction? When did this transaction happen?</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <div style="border: 1px solid #ccc; padding: 2px;">\$ ex: 1.00</div> </div> <div style="width: 45%;"> <div style="border: 1px solid #ccc; padding: 2px;"> 11/05/2019 </div> </div> </div> <p>Comments or notes about this transaction:</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 60px;"> <i>What was this transaction for?</i> </div> <p>Who made this transaction? Create Profile</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> 👤 <input style="flex-grow: 1;" type="text" value="Search by first or last name"/> </div> <p>Is this transaction for a fund or an appeal?</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-right: 10px;">Fund</div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Appeal</div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;"> <i>Start by typing the name of a fund</i> </div> <p><small>📘 Press "enter" to automatically submit the form.</small></p> <div style="text-align: right; margin-top: 20px;"> <div style="border: 1px solid #ccc; padding: 5px 15px; margin-right: 10px;">Close</div> <div style="border: 1px solid #ccc; padding: 5px 15px; background-color: #007bff; color: white;">Create Transaction</div> </div> </div>