Updated
03/01/2019

ROANOKE VALLEY GIVES

BUILDING OUT YOUR PROFILE PAGE

PARTICIPANT RESOURCES

1. **Roanoke Valley Gives Nonprofit Toolkit**
   - Roanoke Valley Gives General Guidelines and Incentive Prize Schedule
   - Adding a User to Your Roanoke Valley Gives Account
   - Nonprofit FAQs
   - How to Get Technical Assistance
   - Roanoke Valley Gives Interactive Workbook
   - Building Out Your Profile Page
2. **Click & Pledge Knowledge Base (help.clickandpledge.com)**
   - General Information Tutorials
   - CONNECT Tutorials
   - GiveBig Tutorials
   - SUBMIT A SUPPORT TICKET
   - Live Support (M-Th; 3:00 – 3:30 PM)

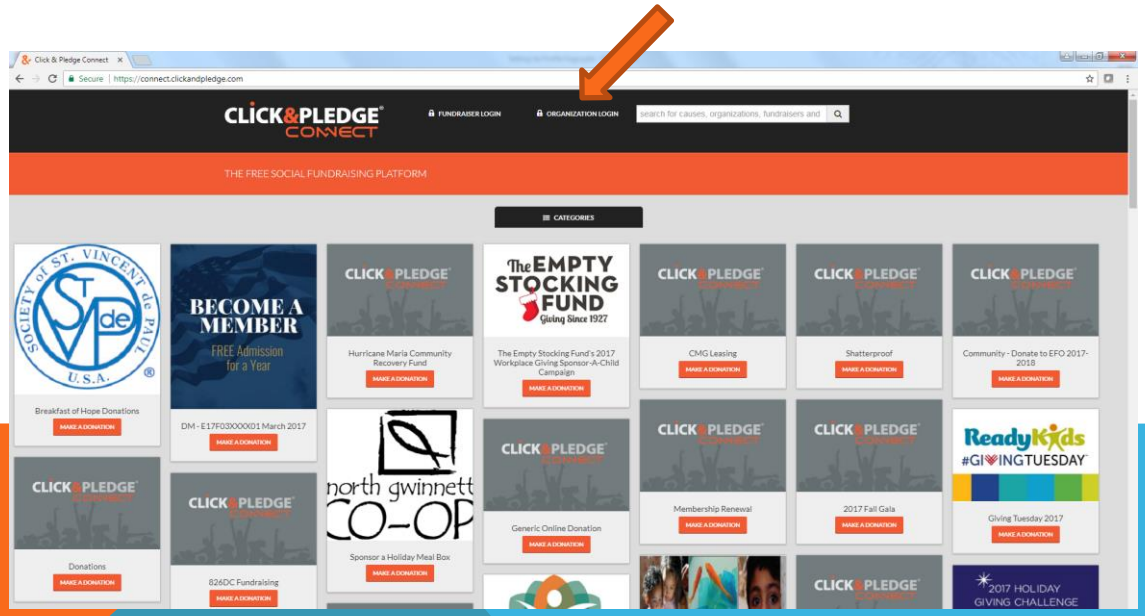
GET YOUR PROFILE READY!

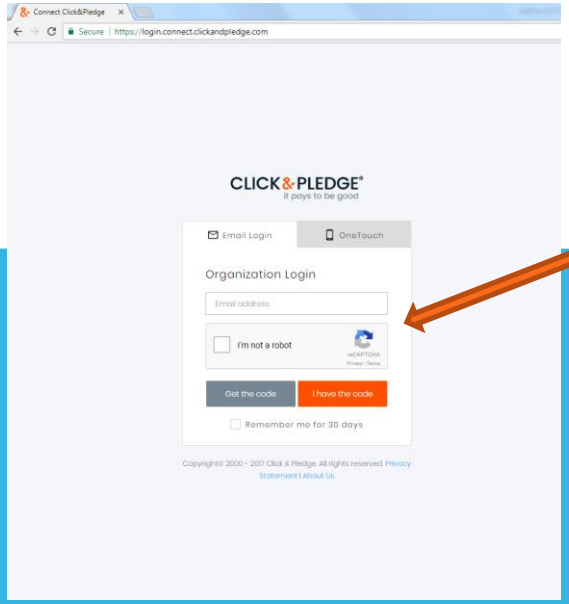
To be **eligible** for a giving day grant, your profile page **MUST** include the items below:

1. Your organization's logo. (Entered as the medium avatar in the profile page)
2. A description of your organization.
3. An updated donation box . Set suggested donation amounts AND remove or revise the default language "donate for".
4. **(NEW!)** Select a maximum of **TWO** categories (tags) for your organization in the Tags and Keywords portion of your page.
5. **(NEW!)** Your Click & Pledge account must be set to the appropriate time zone (Eastern Standard Time, EST) This can be verified by logging into your Click & Pledge account at www.connect.clickandpledge.com.
6. For additional help completing your page, go to the Nonprofit Toolkit on the Roanoke Valley Gives website (https://rvgives.givebig.org) where you'll find a webinar providing guidance on updating your page.

HOW TO LOGIN TO YOUR ROANOKE VALLEY GIVES PROFILE PAGE

1) Visit https://connect.clickandpledge.com
2) Select “Organization Login”
3) Enter username, Select “I’m not a robot” and Check “remember me”
4) Select “Get the code”. (A code will be emailed to you with further instructions.)
5) Visit http://help.clickandpledge.com/customer/en/portal/articles/2877686-givebig-how-to-login for complete instructions.

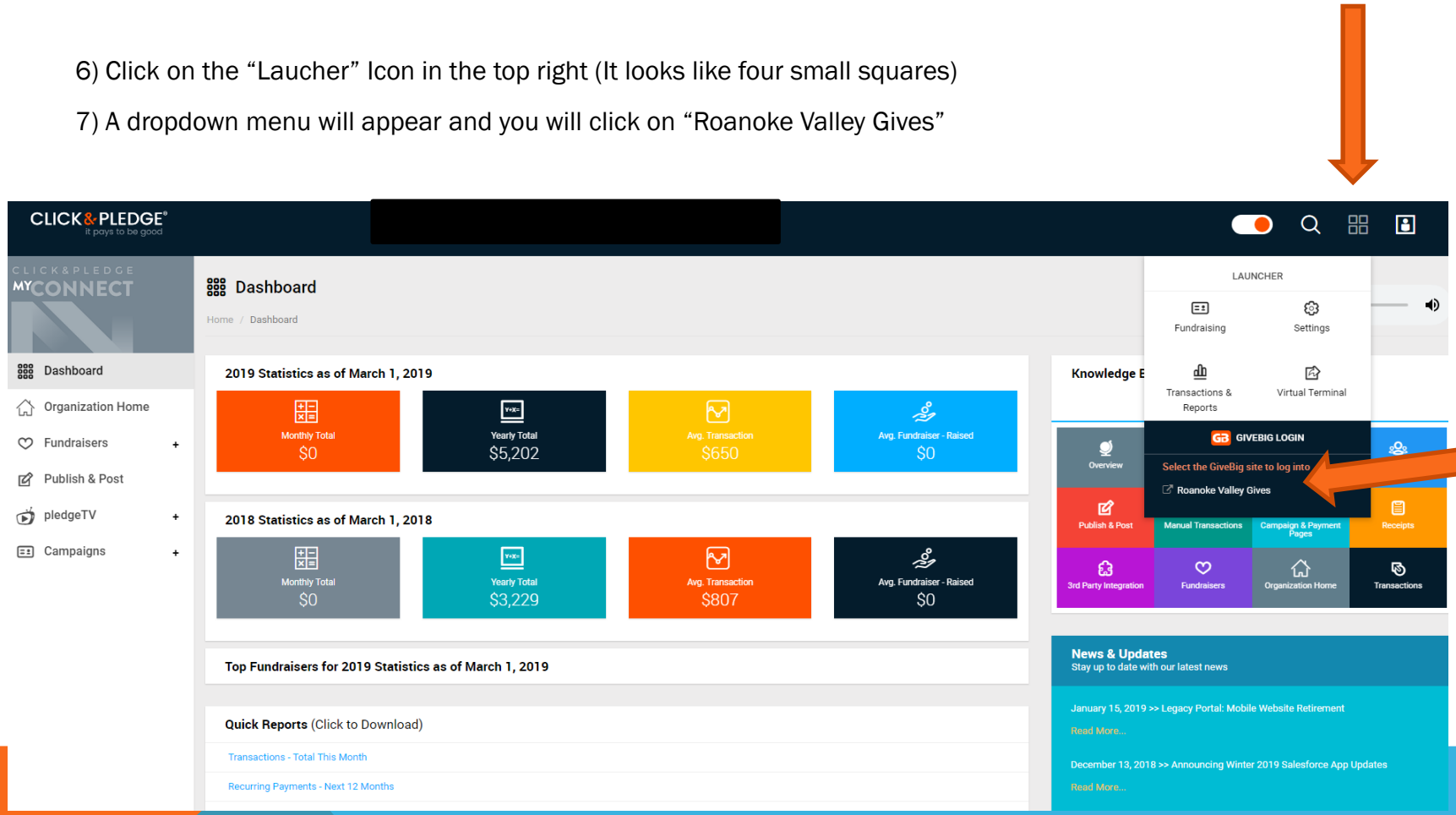




HOW TO LOGIN CONTINUED

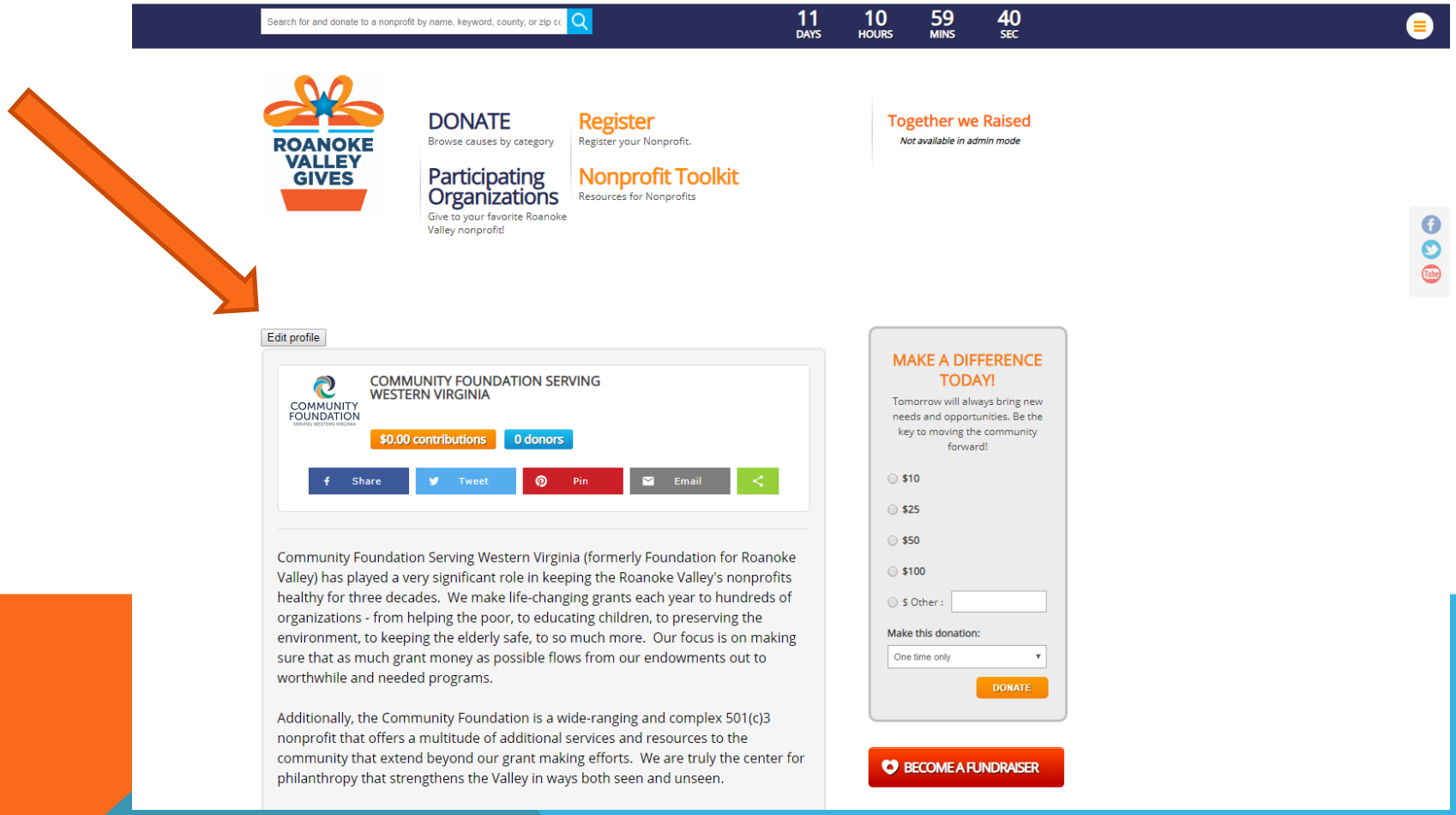
6) Click on the “Laucher” Icon in the top right (It looks like four small squares)

7) A dropdown menu will appear and you will click on “Roanoke Valley Gives”



HOW TO LOGIN CONTINUED

8) Your profile page will appear and you will then need to select “Edit Profile”.

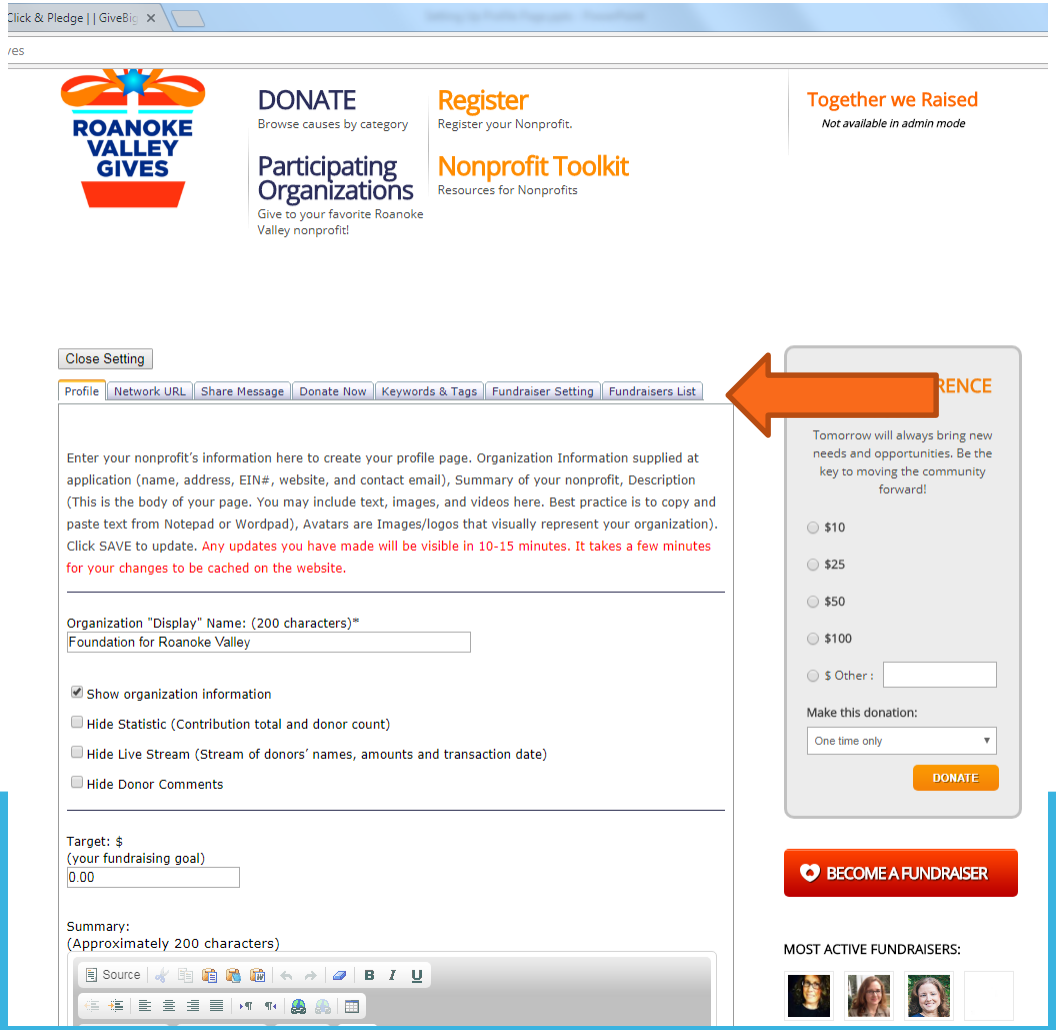


TIP #1 – COPY & PASTE

- Begin building your profile page in Microsoft Word!! Take advantage of spell check.
- When text is complete, copy and paste in Notepad in order to remove any special coding.
- Then copy and past into your Roanoke Valley Gives profile page.

HOW TO BEGIN MAKING EDITS

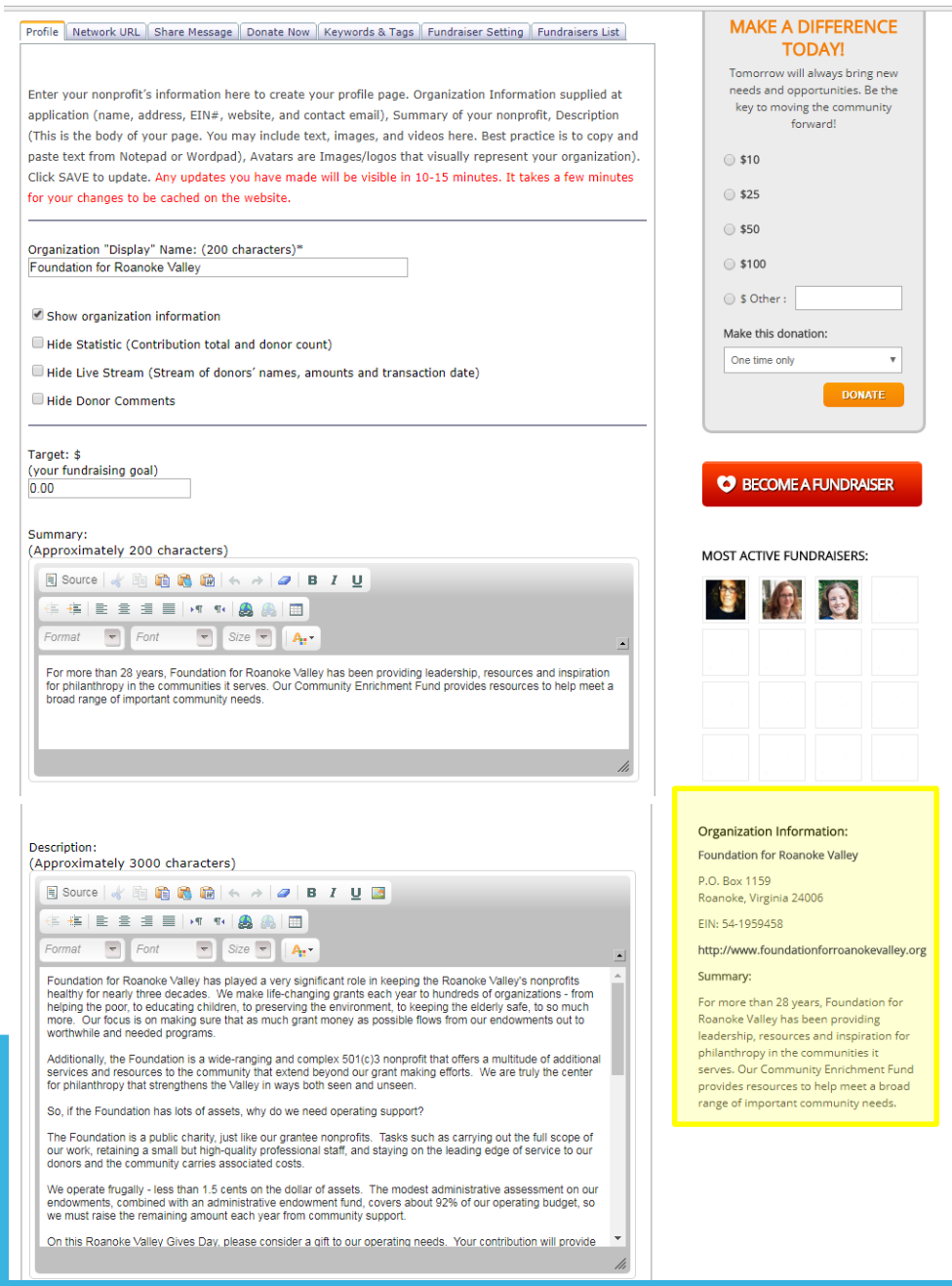
1) Once you have selected “Edit Profile,” the following page will appear. This is where almost all changes to your organization’s profile page are added/edited/deleted.
2) Each of the tabs shown below will be described in detail on the following pages.
   - Profile
   - Network URL
   - Share Message
   - Donate Now
   - Keywords & Tags
   - Fundraiser Setting
   - Fundraiser List



PROFILE TAB

- **Organization Display Name:** Insert your organization's name. If you have a DBA be sure to use the most commonly recognized name.
- **Select "Show Organization Information."** This allows your organization's contact information to appear on your profile page. To change your contact information, you must login to your Click & Pledge account at www.connect.clickandpledge.com.
- **Insert "Target: $) your fundraising goal".** This is not a required field, but can be used if your organization establishes a fundraising goal for Roanoke Valley Gives.
- **Organization "Summary"**
  - Approximately 200 characters
  - Seen on category page and bottom left side of profile page
- **Description**
  - Approximately 3000 characters
  - Insert video and photos here
  - Include a link to your organization's webpage
- **Upload medium avatar (organization logo)**
  - Size of image matters (72 dpi, compress image to 90x90 pixels)
  - Can use Microsoft Picture Manager or Paint

- **DON'T FORGET TO SAVE!!!! Any updates you have made will be visible in 10-15 minutes. It takes a few minutes for your changes to be cached on the website.**



d=foundation%20for%20roanoke%20valley

Search for and donate to a nonprofit by name, keyword, county, or zip cc

ROANOKE VALLEY GIVES

DONATE
Browse causes by category

Register
Register your Nonprofit.

Participating Organizations
Give to your favorite Roanoke Valley nonprofit!

Nonprofit Toolkit
Resources for Nonprofits

SEARCH RESULTS

Avatar

Organization Display Name

FOUNDATION FOR ROANOKE VALLEY

DONATE NOW
raised $3,875.00

For more than 27 years, Foundation for Roanoke Valley has been providing leadership, resources and inspiration for philanthropy in the communities it serves. Our Community Enrichment Fund provides resources to help meet a broad range of important community needs.

Organization Summary

F.R.E.E. FOUNDATION

DONATE NOW
raised $200.00

FREE gives mobility related rehabilitation equipment to those who need it but don't have the necessary resources to obtain it. Through this gift, functional independence is regained as well as quality of life.

CARLY OLIVER

DONATE NOW
raised $520.00

Foundation for Roanoke Valley has been serving this region for over 27 years! I have been a part of this great organization for

THE RESCUE MISSION OF ROANOKE

$57,200.00 contributions | 177 donors

Raised: $57200 Remaining: $0

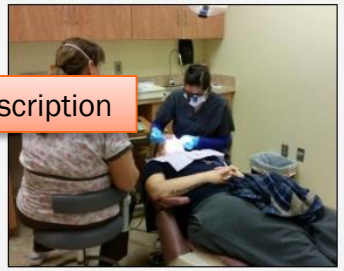
Share 0 Tweet 0 Pinterest 0 Google + 0 Share 0

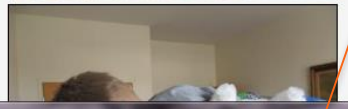
Target

Homelessness isn't the end of the story but the beginning...

Where would you go if you were homeless with no where to turn? What would you do if you were caught in the bondage of addiction and out of options for help breaking free? Where would you go if you had no address and no insurance? Aren't you glad there's a Rescue Mission? For 68 years, the Rescue Mission has been a place of refuge, hope, and transformation for men, women, and children in crisis.

When you give to the Rescue Mission, you are providing a meal for a hungry child, health care for someone who has no options, one more day of supported sobriety for the addict, job training for the previously unemployable, food for a family on the verge of homelessness, tutoring for the woman getting her GED, and most importantly, hope for the hopeless.





Description

MAKE A CHANGE NOW

With your donation, you can change homelessness in Roanoke.

- $25 - Provides a day at summer camp for a child
- $50 - Provides clothing vouchers for a family of five
- $100 - Provides one day of recovery for a man or woman
- ...0 - Provides 4,000 meals
- $ Other :

Make this donation: One time only

DONATE

BECOME A FUNDRAISER

MOST ACTIVE FUNDRAISERS:

Organization Information:

The Rescue Mission of Roanoke

P.O. Box 11525
Roanoke, Virginia 24022

EIN: 54-0573900

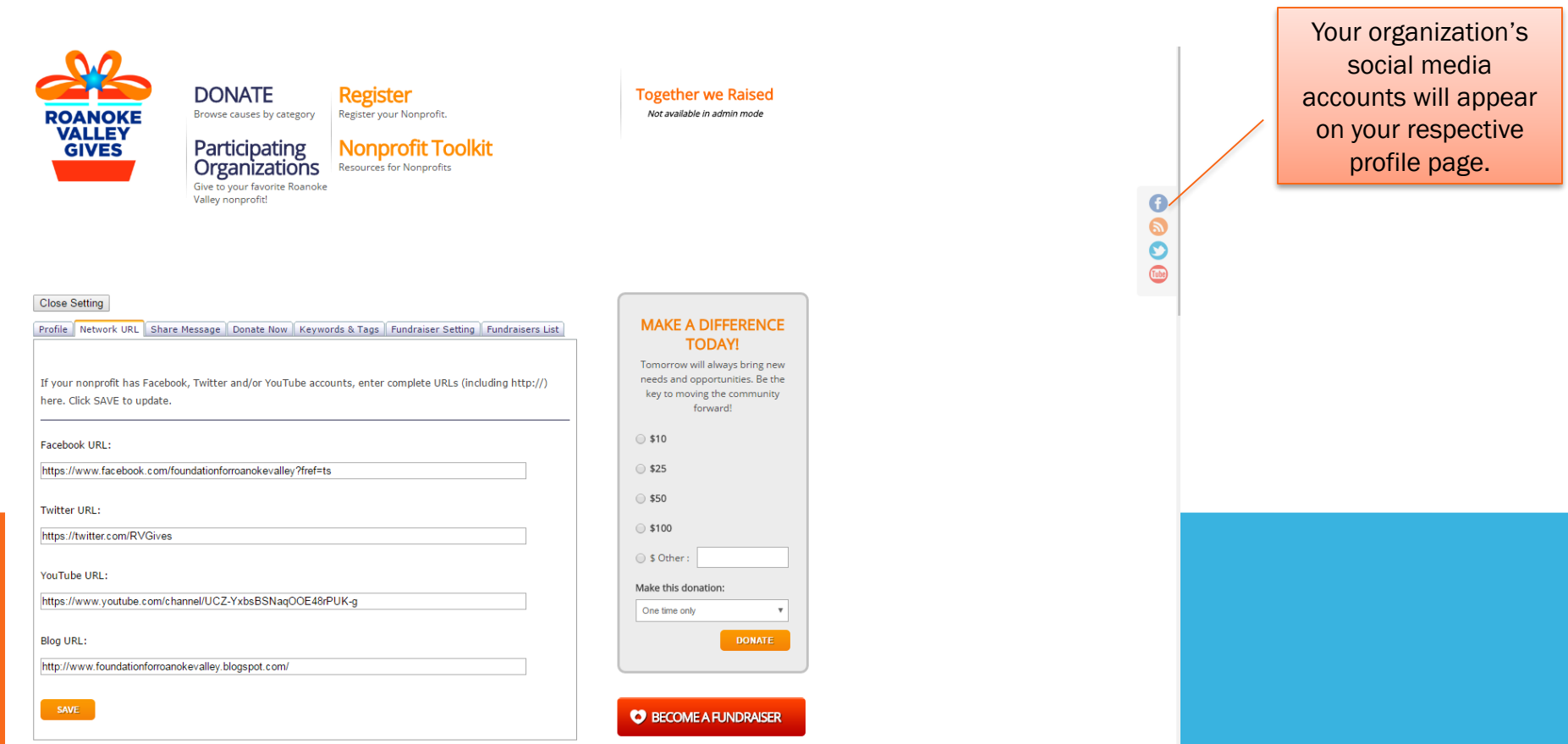
http://rescuemission.net

Summary: The Rescue Mission provides compassionate care to men, women, and children in crisis. Services are 24/7 and include shelter, food, medical care, addiction recovery, job skills training, case management, and more.

Show Organization Information

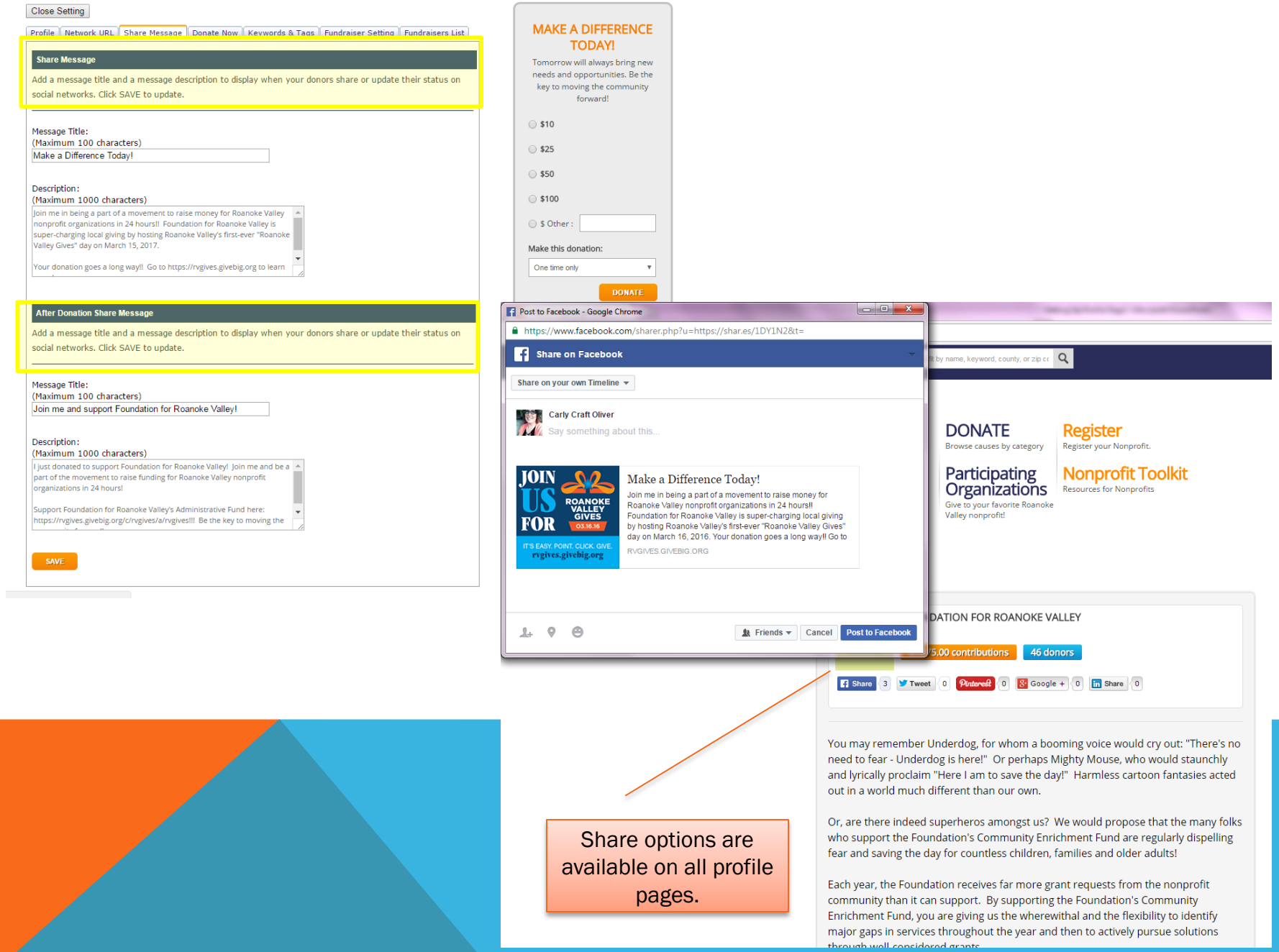
NETWORK URL

- If your nonprofit has Facebook, Twitter and/or YouTube accounts, enter complete URLs (including http://) here.
- Click SAVE to update!



SHARE MESSAGES

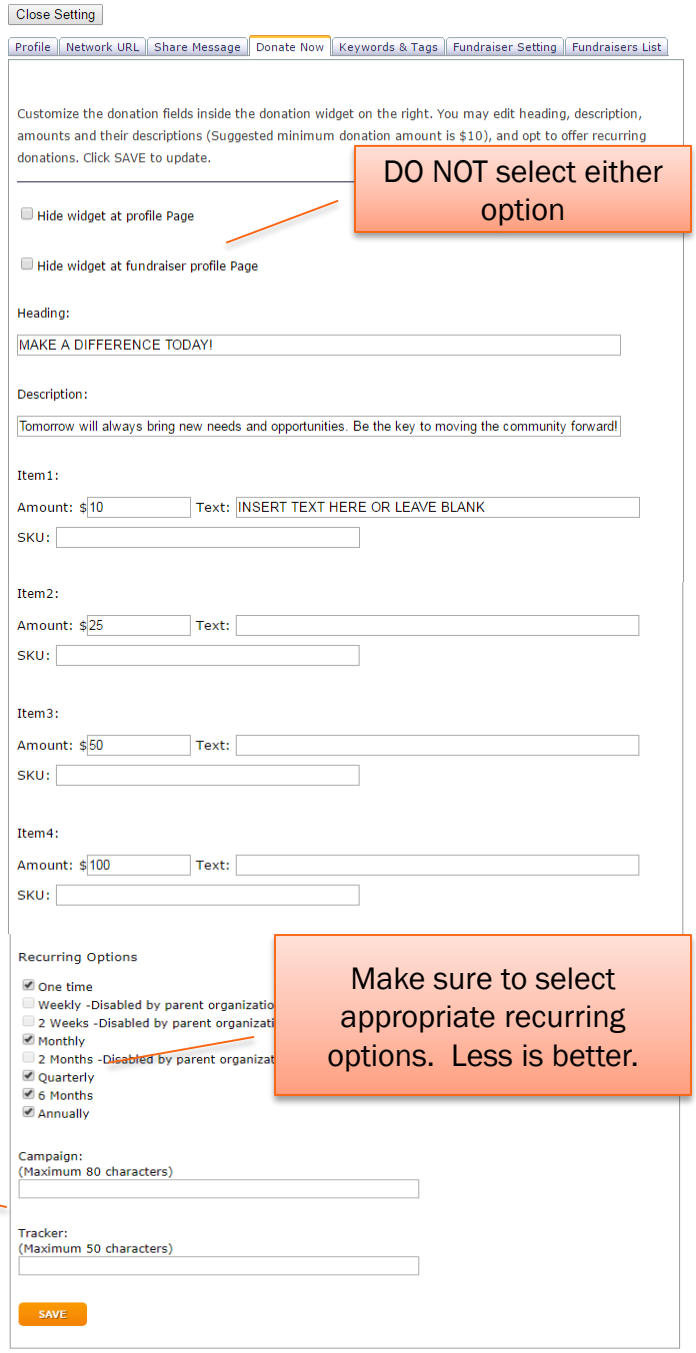
- **Share Message**
  - Add a message title and a message description to display when your donors share or update their status on social networks. Click SAVE to update!
  - Example Message Title:
    - Join me and give where you live!
  - Example Message Description:
    - Join me in being a part of a movement to raise money for [ORG NAME HERE]!! Foundation for Roanoke Valley is super-charging local giving by hosting Roanoke Valley's community-wide "Roanoke Valley Gives" day on March 13, 2019. Your donation goes a long way!! Support us by donating here: [INSERT ORG PROFILE PAGE ADDRESS]
- **After Donation Share Message**
  - Add a message title and a message description to display when your donors share or update their status on social networks. Click SAVE to update!
  - Example Message Title:
    - Join me and support [ORG NAME HERE]!
  - Example Message Description:
    - I just donated to [ORG NAME EHRE]! Join me and be a part of the movement to raise funding for Roanoke Valley nonprofit organizations in 24 hours! [ORG NAME HERE] is aiming high with a goal of $_____ to _____. Support [ORG NAME HERE] by donating here: [INSERT ORG PROFILE PAGE ADDRESS]
- **If you decide NOT to add a share message or after donation share message, a default message about Roanoke Valley Gives created by Foundation for Roanoke Valley will automatically be used.**
- **Share Messages can be sent directly from your profile page.**



Share options are available on all profile pages.

DONATE NOW

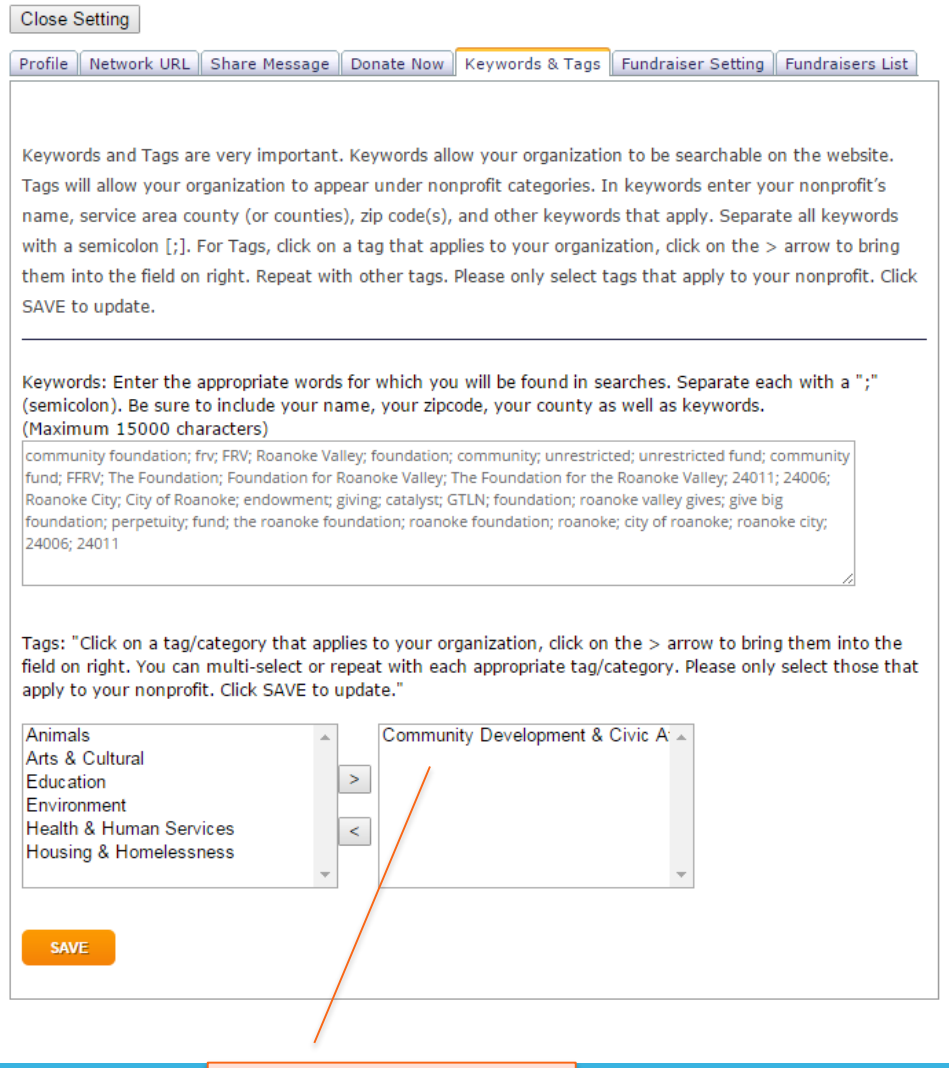
- Customize the donation fields inside the donation widget on the right. You may edit heading, description, amounts and their descriptions (Minimum donation amount is $10), and opt to offer recurring donations.
- Do NOT select “Hide widget at profile Page” OR “Hide widget at fundraiser profile Page”.
- Set suggested donation amounts for your page.
- You must either remove the “donate for” text or customize the text to describe what each contribution level supports.
- Make sure “Show Recurring” is checked so your donors can set up recurring transactions.
- Click SAVE to update!



Leave “Campaign” and “Tracker” fields blank

KEYWORDS & TAGS

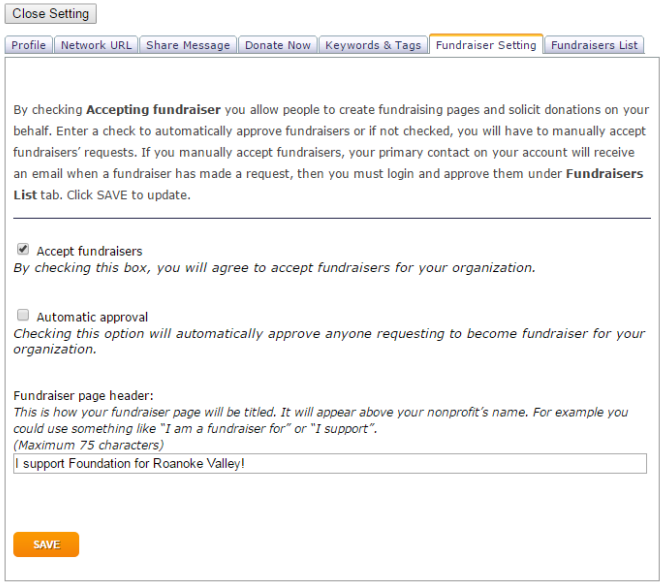
- List keywords that a donor can search to find your organization, separated by a semi-colon. (Maximum 15,000 characters)
- Make sure you have the city/county your organization is located in AND the zip code of your organization's mailing address and/or physical address listed in the keywords box. This will allow folks to search for your organization by city/county or zip code.
- In the Tags section, **select a maximum of TWO categories** appropriate for your organization by moving them from the left box to the right. **You SHOULD NOT have all the categories in the right side box!!**

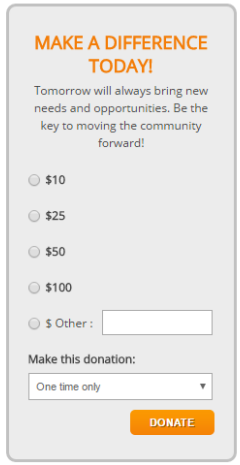


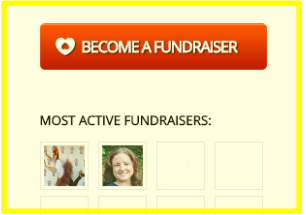
You should **ONLY** have a maximum of two categories in this box

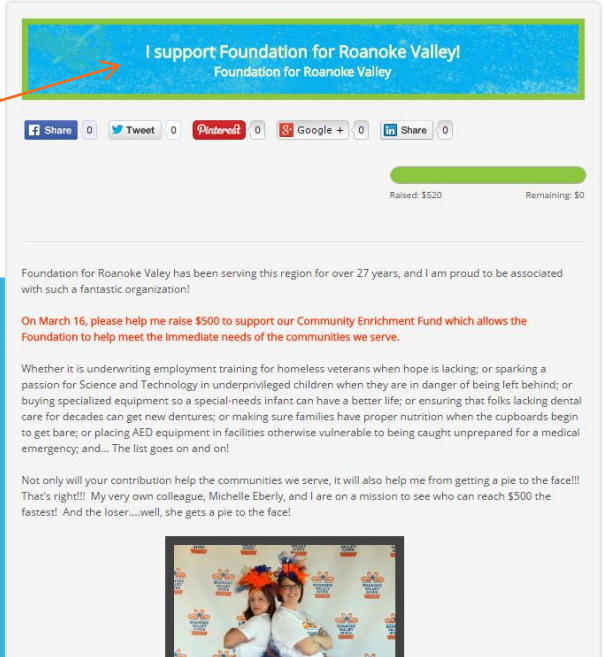
FUNDRAISER SETTING

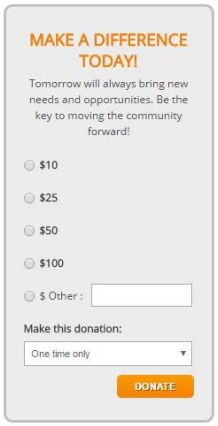
- By checking "**Accepting fundraisers"** you allow people to create fundraising pages and solicit donations on your behalf.
- Enter a check to automatically approve fundraisers or if not checked, you will have to manually accept fundraisers' requests. If you manually accept fundraisers, your primary contact on your account will receive an email when a fundraiser has made a request, then you must login and approve them under **Fundraisers List** tab.
- Add Fundraiser page header. (Example: I support Foundation for Roanoke Valley!)



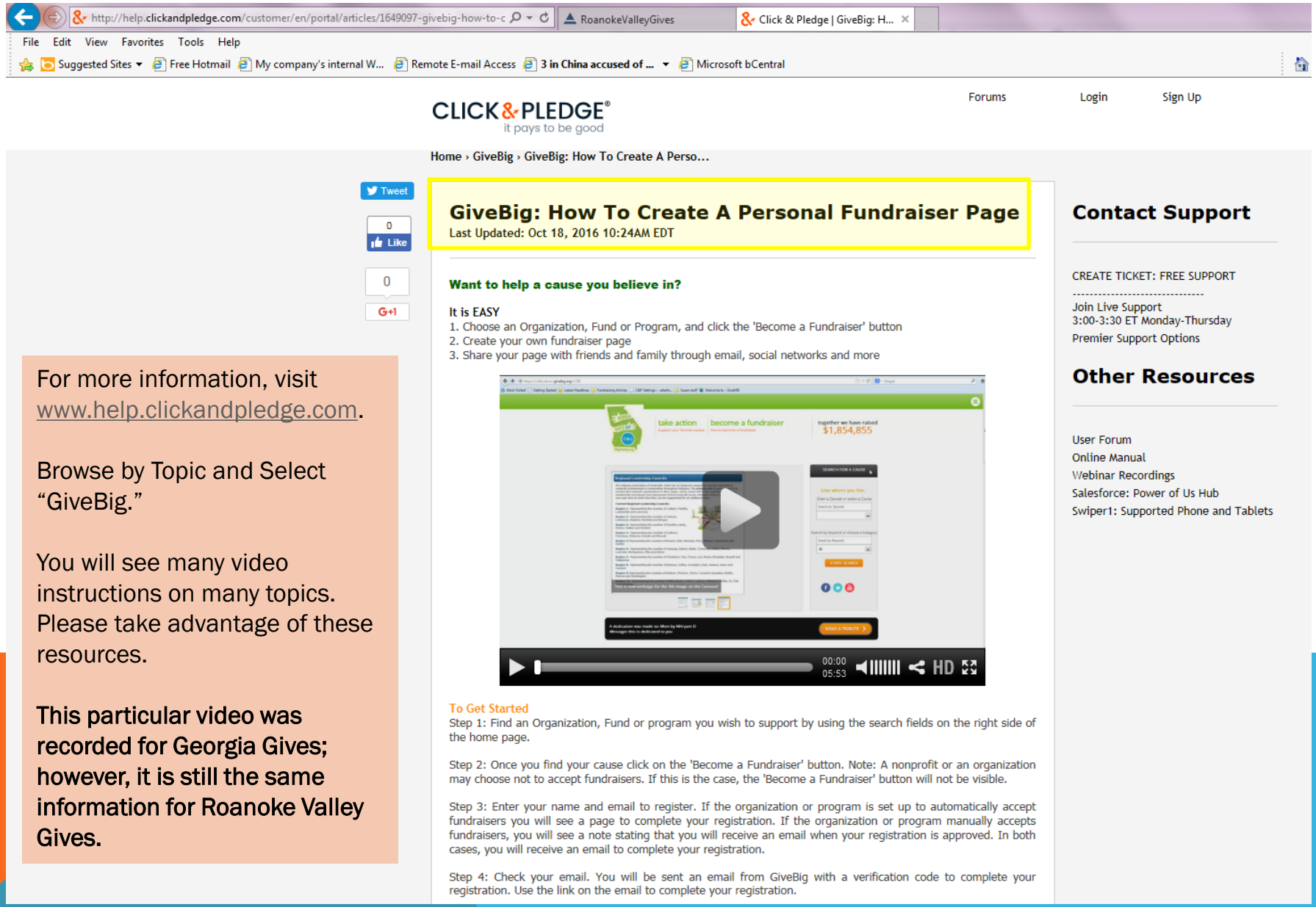








FUNDRAISER RESOURCES



For more information, visit www.help.clickandpledge.com.

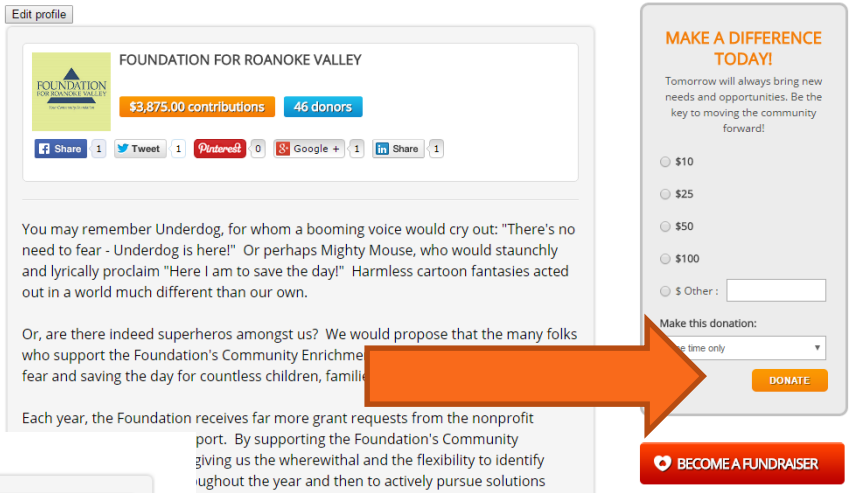
Browse by Topic and Select "GiveBig."

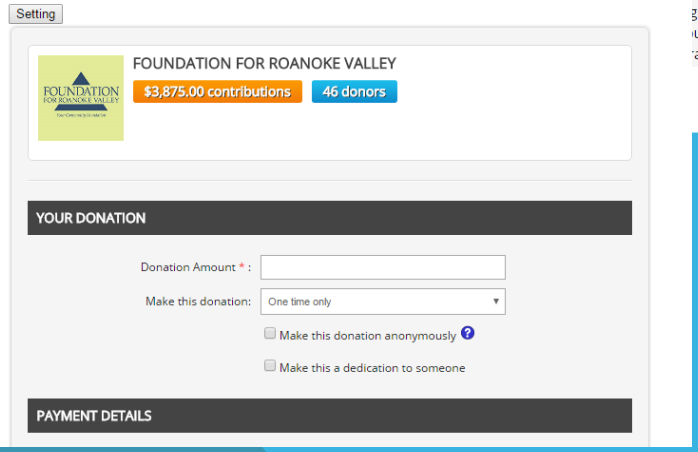
You will see many video instructions on many topics. Please take advantage of these resources.

This particular video was recorded for Georgia Gives; however, it is still the same information for Roanoke Valley Gives.

DONATE – BASIC SETTINGS

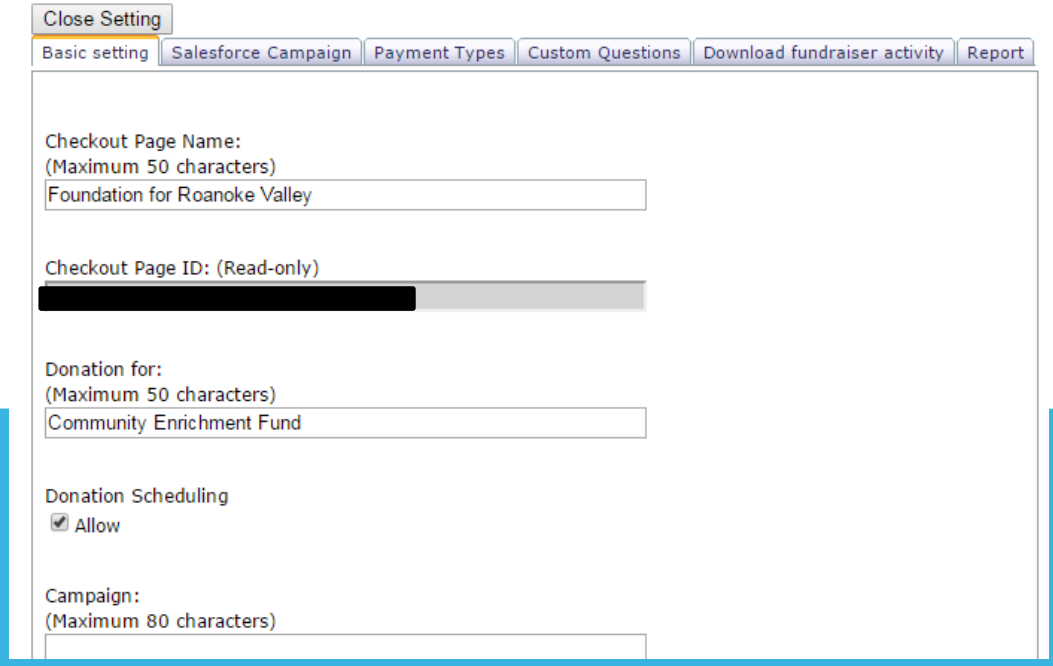
- Login to your Roanoke Valley Gives profile page.
- Next, you will want to update your checkout page.
- Click on the Donate button and then click on “Setting” located above your organization’s logo.





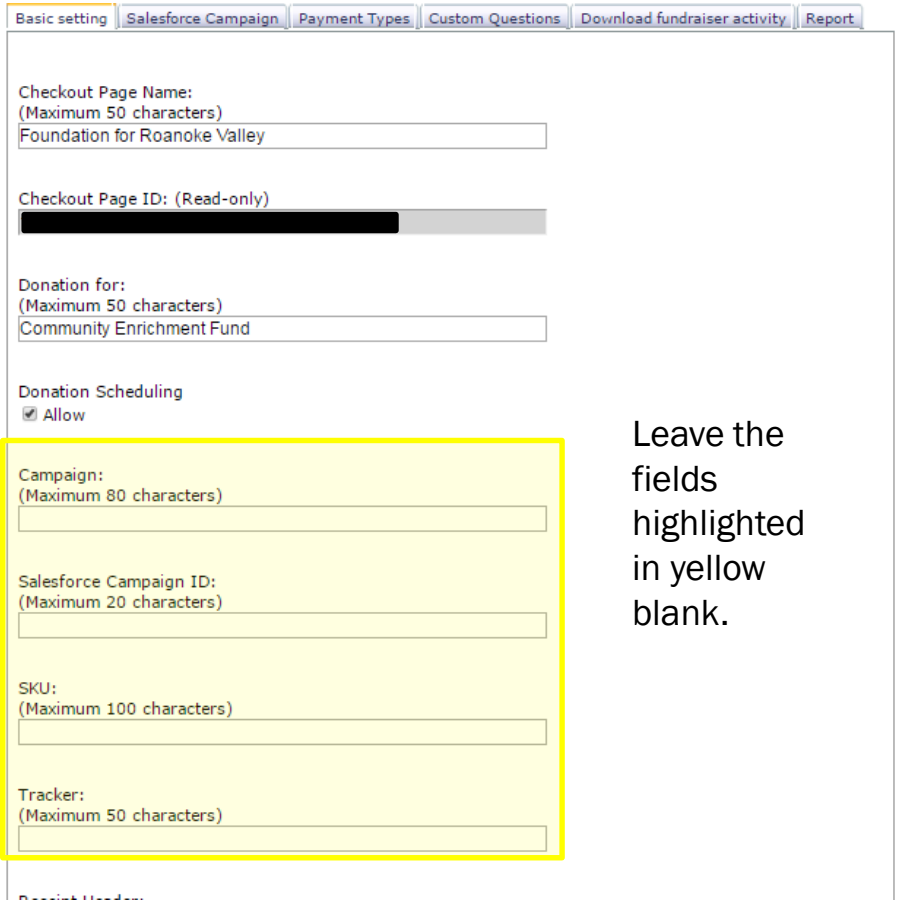
HOW TO BEGIN MAKING EDITS

1) Once you have selected "Setting," the following page will appear.
2) Each of the tabs shown below will be described in detail on the following pages.
   - Basic Setting
   - Salesforce Campaign
   - Payment Types
   - Custom Questions
   - Download fundraiser activity
   - Report



DONATE – BASIC SETTING

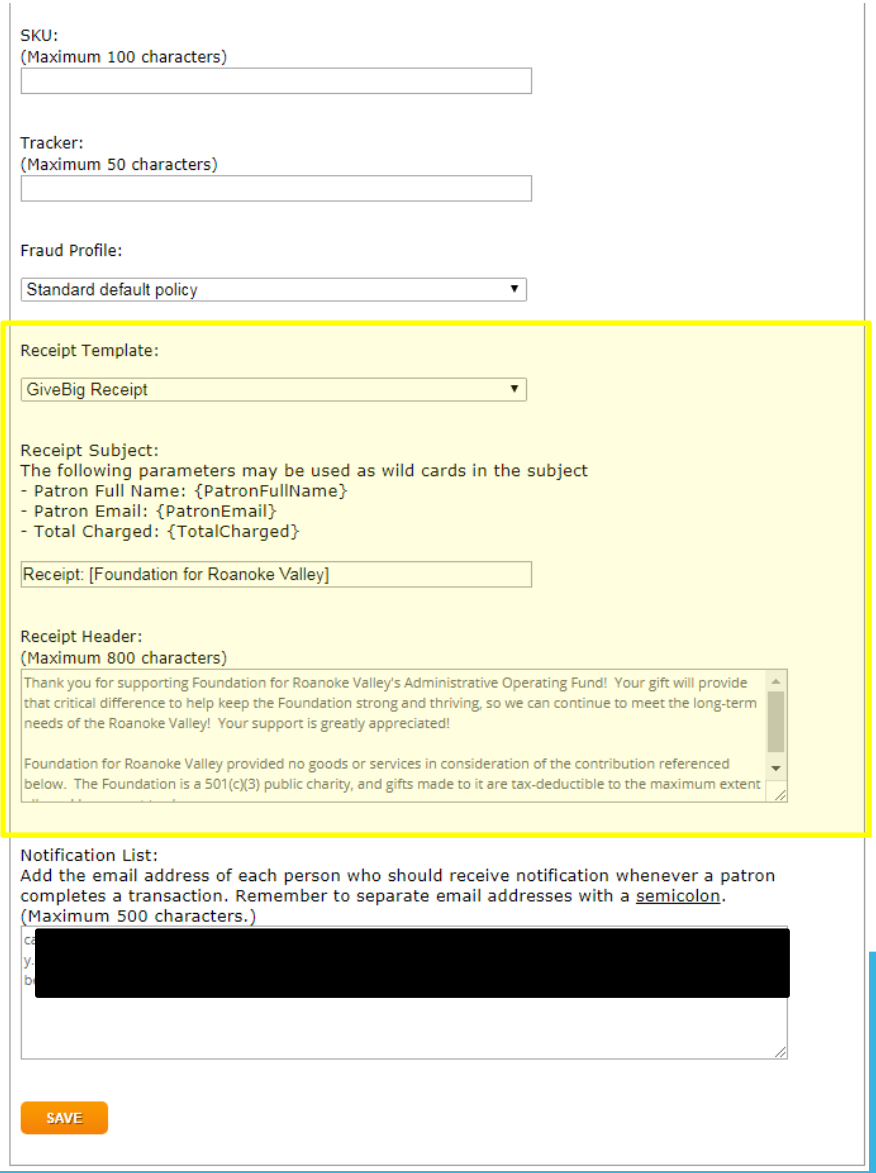
- Enter your organization name for Checkout Page Name and the Donation For boxes
- Make sure you check the Donation Scheduling box that allows your donors to set up a credit card transaction ahead of time to process on Roanoke Valley Gives Day.



Leave the fields highlighted in yellow blank.

DONATE – BASIC SETTING

- Add a Receipt Header
- Add staff to receive notifications when donations are made
- NEW FEATURE! You can customize a receipt for Roanoke Valley Gives in the CONNECT platform. Once the new receipt has been created and saved, the new receipt template can be found in the “Receipt Template” drop-down menu.
- Visit help.clickandpledge.com for complete instructions on Receipt Building.



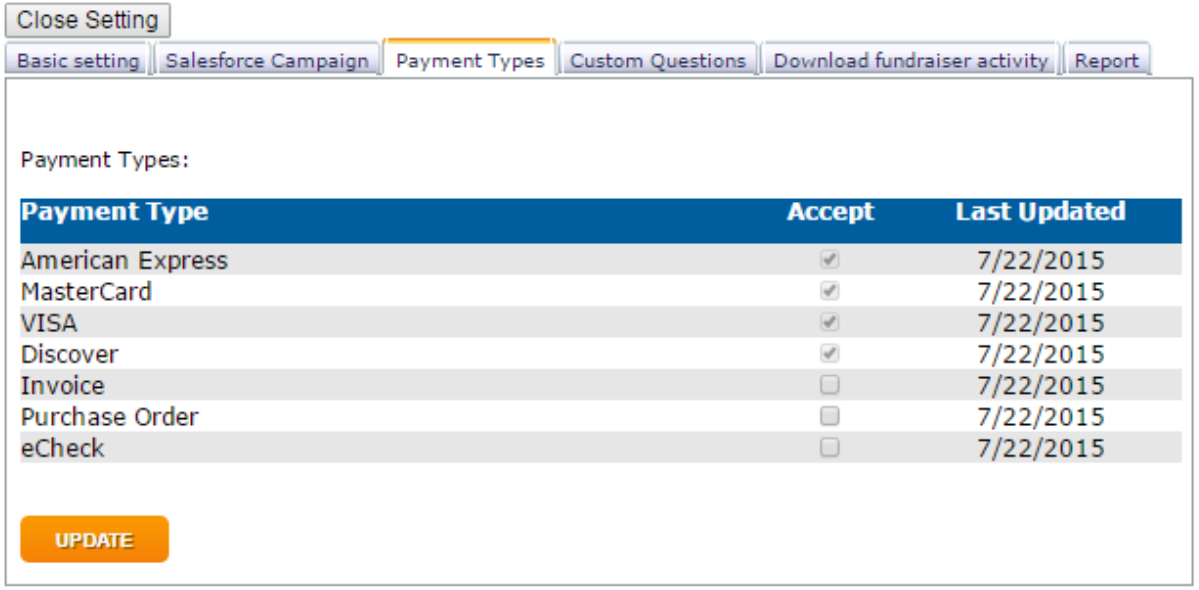
DONATIONS – SALESFORCE CAMPAIGN

- Unless you are a Salesforce customer you may skip this tab.

DONATIONS – PAYMENT TYPES

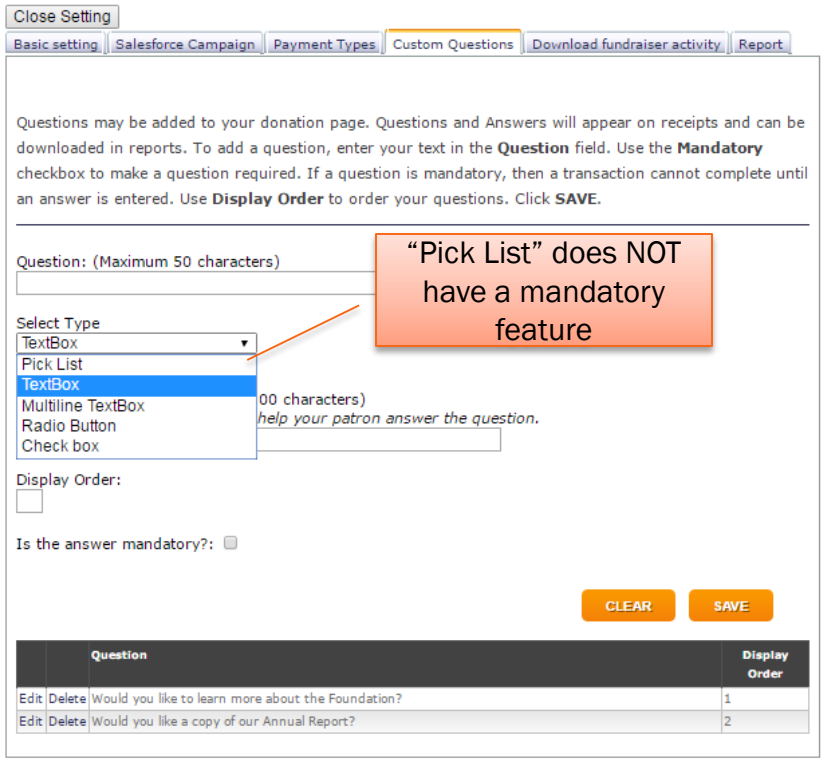
- Be sure that the following payment types have been selected:
  - American Express (default)
  - MasterCard (default)
  - VISA (default)
  - Discover (default)

  - eCheck, CASH, Purchase Order or Invoice WILL NOT BE ACCEPTED!

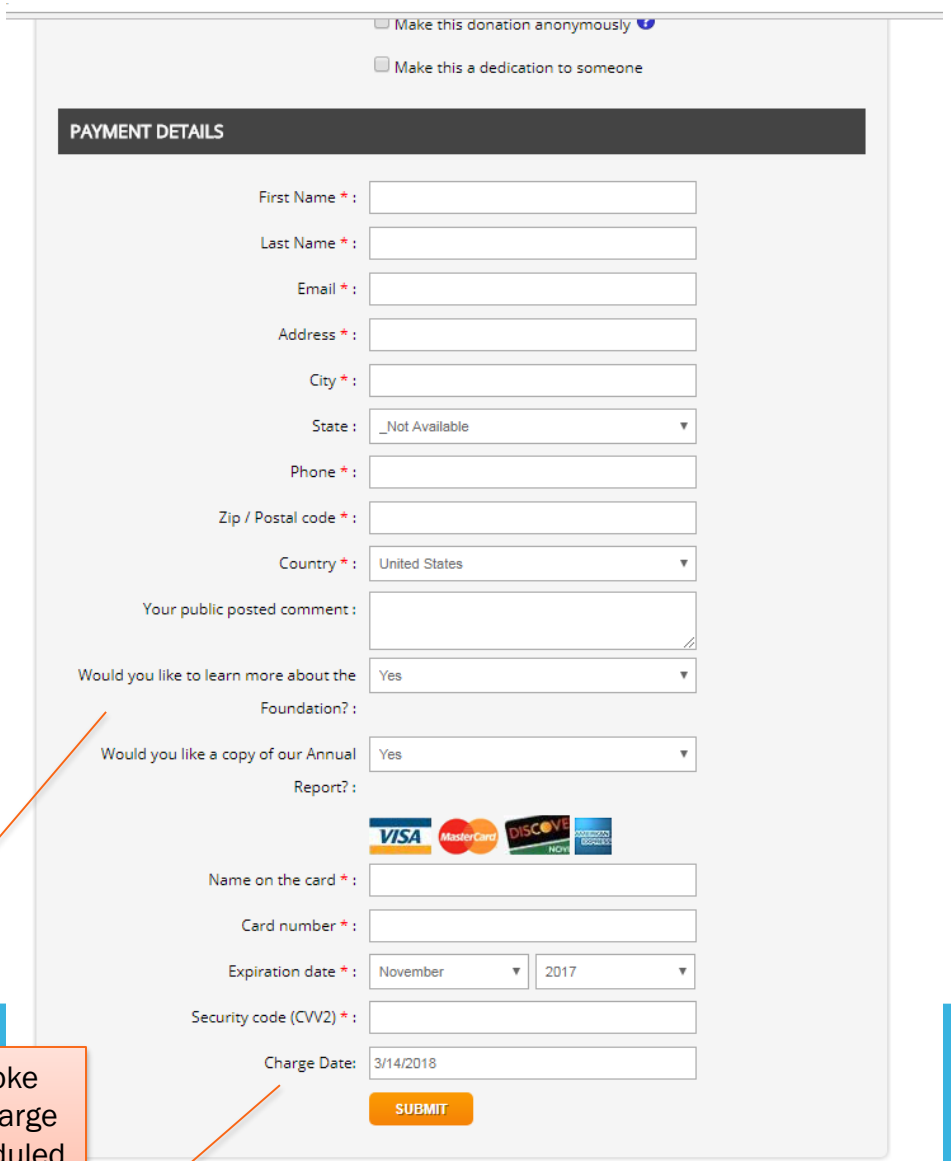


DONATIONS – CUSTOM QUESTIONS

- Questions may be added to your donation page. Questions and Answers will appear on receipts and can be downloaded in reports.
- To add a question, enter your text in the **Question** field.
  - Would you be interested in volunteering?
  - Would you like more information about ORG NAME HERE?
- Use the **Mandatory** checkbox to make a question required. If a question is mandatory, then a transaction cannot complete until an answer is entered. Be careful how many "mandatory" questions a donor has to complete. You don't want the donor to become frustrated and not complete his/her transaction!
- Use **Display Order** to order your questions.
- Click **SAVE**.



"Pick List" does NOT have a mandatory feature



Custom Questions will show up on your organization's donation page

If donors would like to schedule a gift for Roanoke Valley Gives Day, they will need to be sure the charge date is set to Roanoke Valley Gives Day. All scheduled donations will not appear on the Roanoke Valley Gives website until Roanoke Valley Gives Day. Foundation staff does not have a specific time that donations will begin to be processed by TransFirst/TSYS.

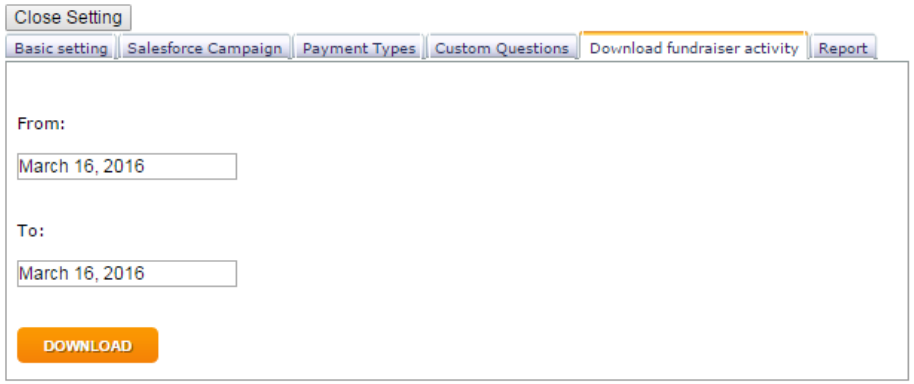
TIP #2 – DONATIONS

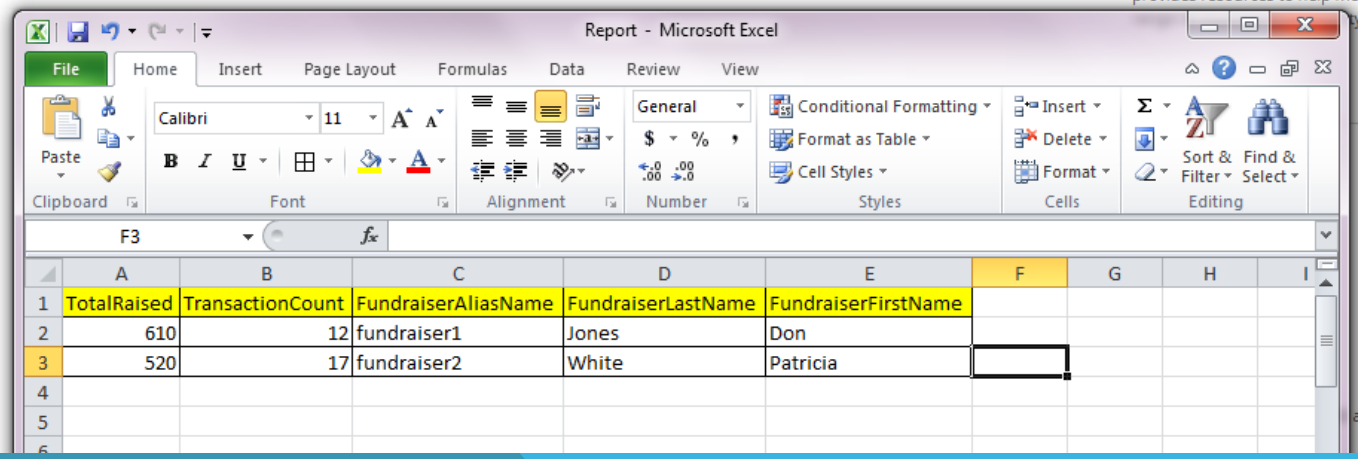
- Test your account by making a small contribution through your giving page ASAP! Then check your bank account 48 hours later to ensure that the gift has been deposited.
- If the gift does not show up in your account within 48 hours, submit a support ticket to Click & Pledge by visiting http://help.clickandpledge.com/
- In the subject link include GIVEBIG – Roanoke Valley Gives and include your organization name, account number (if you have access), a link to your giving page, and a full description of the problem included.
- IF YOU TEST USING A PRE-SCHEDULE GIFT, please note that your gift will NOT show up on the Roanoke Valley Gives platform OR your account until it has been processed on the scheduled date.

DONATIONS – DOWNLOAD FUNDRAISER ACTIVITY

This tab allows you to view your fundraiser activity during a specified time frame.

- Total Dollars Raised by each individual fundraiser
- Total Transaction Count by each individual fundraiser
- Fundraiser Name (Alias, Last Name and First Name)

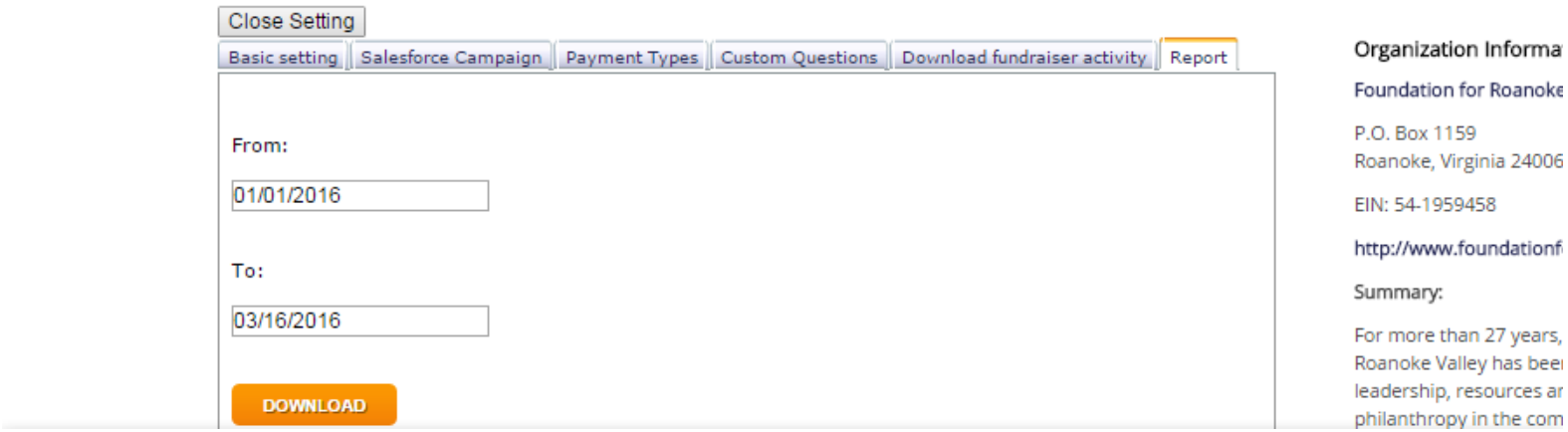




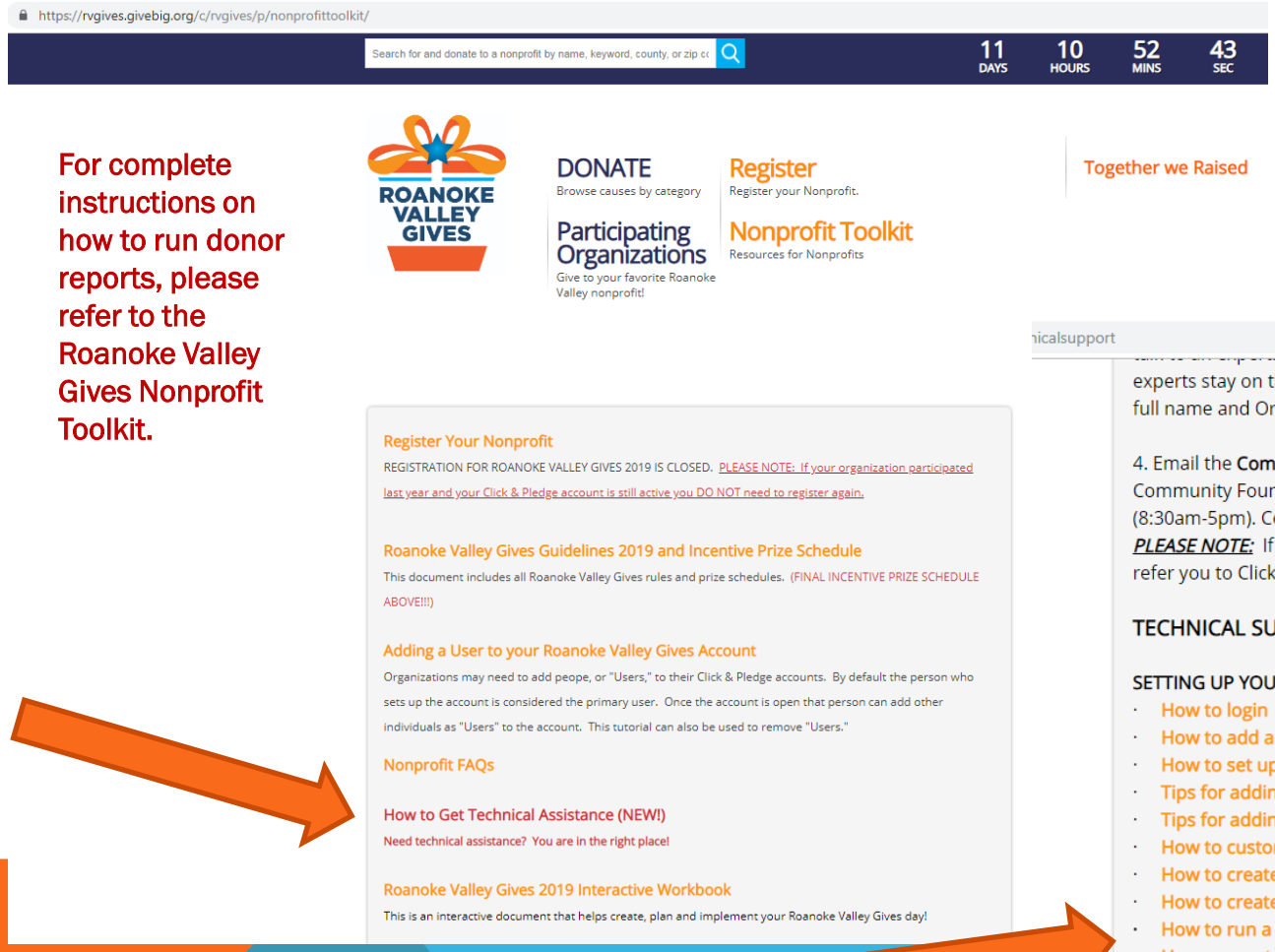
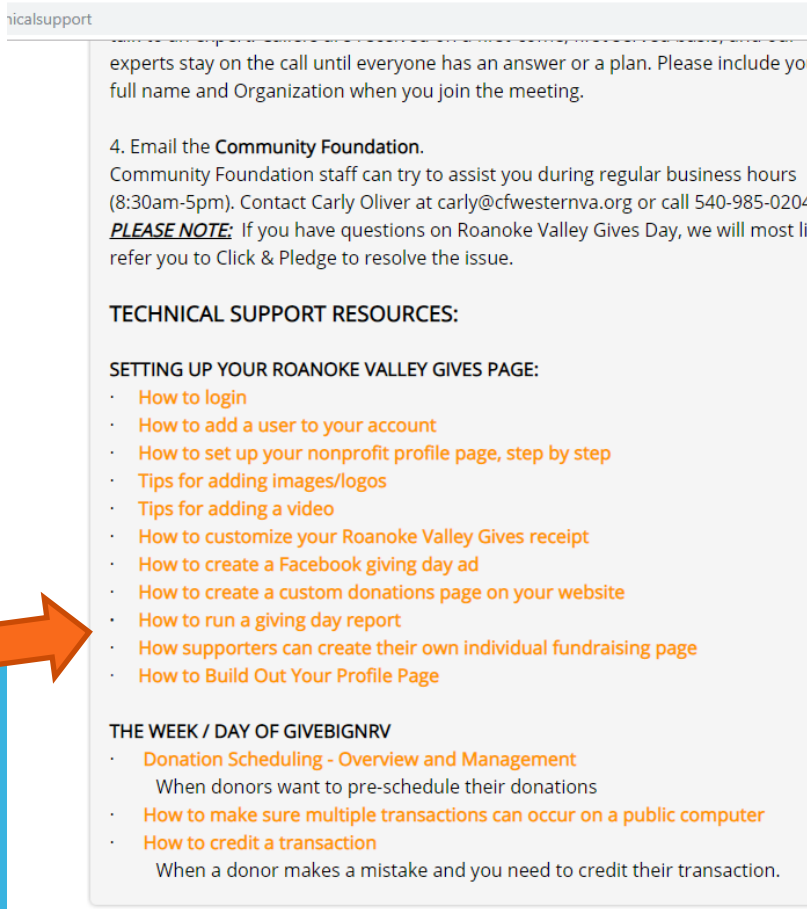
DONATIONS – REPORT

This tab allows you to view all transactions during a specified time frame.

- Donor information (address, email address)
- Total Charged, Transaction Date, Processing Date and Amount Due



For complete instructions on how to run donor reports, please refer to the Roanoke Valley Gives Nonprofit Toolkit.

DONATIONS – REPORT

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