

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](http://help.clickandpledge.com))

- General Information Tutorials
- CONNECT Tutorials
- GiveBig Tutorials
- SUBMIT A SUPPORT TICKET
- Live Support (M-Th; 3:00 – 3:30 PM)

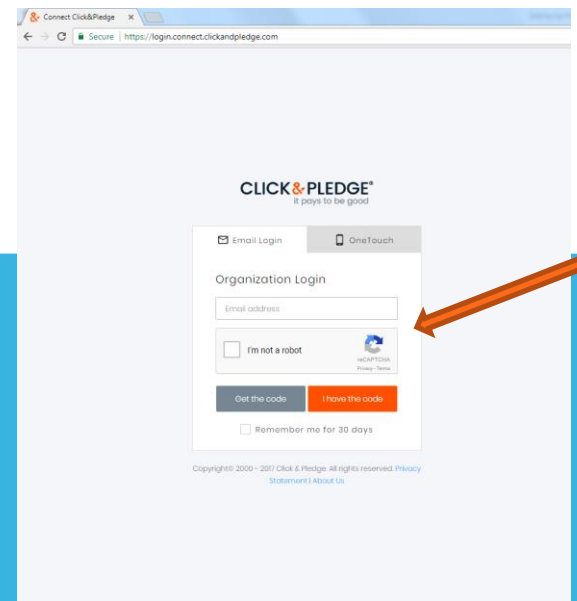
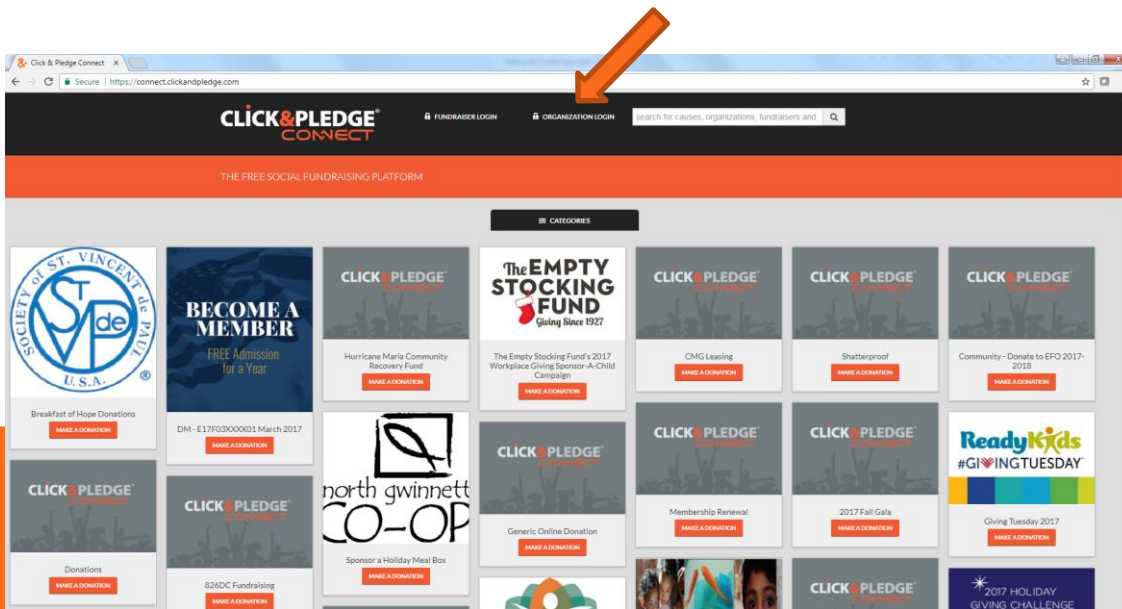
# GET YOUR PROFILE READY!

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](http://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”



The screenshot shows the Click & Pledge dashboard interface. The top navigation bar includes the logo, a search icon, a launcher icon (four small squares), and a user profile icon. The launcher icon is highlighted with an orange arrow pointing down. A dropdown menu titled 'LAUNCHER' is open, showing options for Fundraising, Settings, Transactions & Reports, and Virtual Terminal. Below this, a 'GIVEBIG LOGIN' section is visible, with an orange arrow pointing to the 'Roanoke Valley Gives' option. The dashboard also displays 2019 and 2018 statistics, top fundraisers, and quick reports.

Category	Value
Monthly Total	\$0
Yearly Total	\$5,202
Avg. Transaction	\$650
Avg. Fundraiser - Raised	\$0

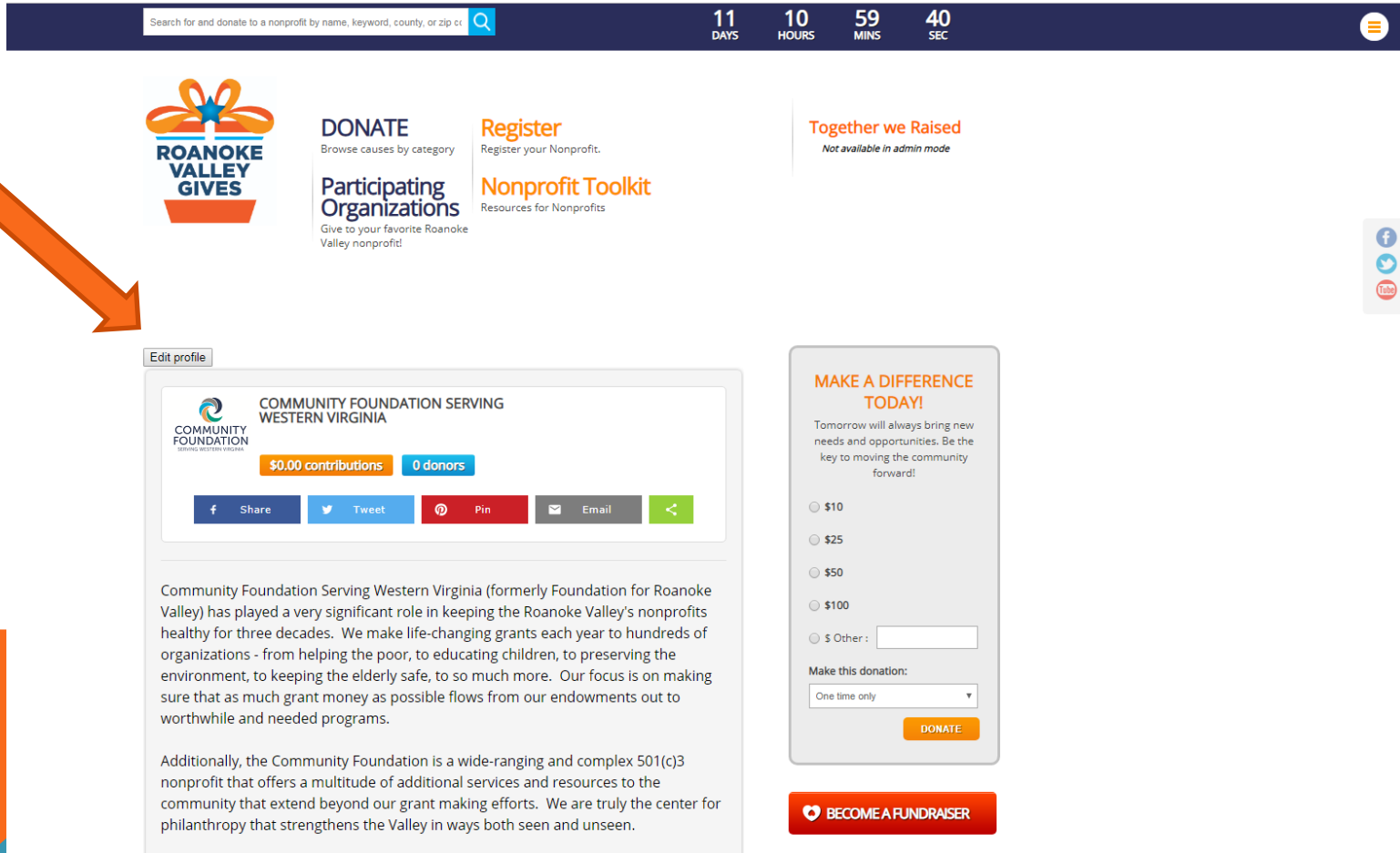
Category	Value
Monthly Total	\$0
Yearly Total	\$3,229
Avg. Transaction	\$807
Avg. Fundraiser - Raised	\$0

Rank	Name	Amount
1	...	...
2	...	...
3	...	...

Report Name
Transactions - Total This Month
Recurring Payments - Next 12 Months

# HOW TO LOGIN CONTINUED

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



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

11 DAYS 10 HOURS 59 MINS 40 SEC

**ROANOKE VALLEY GIVES**

**DONATE**  
Browse causes by category

**Register**  
Register your Nonprofit.

**Together we Raised**  
*Not available in admin mode*

**Participating Organizations**  
Give to your favorite Roanoke Valley nonprofit!

**Nonprofit Toolkit**  
Resources for Nonprofits

**MAKE A DIFFERENCE TODAY!**  
Tomorrow will always bring new needs and opportunities. Be the key to moving the community forward!

\$10  
 \$25  
 \$50  
 \$100  
 \$ Other :

Make this donation:

**DONATE**

**BECOME A FUNDRAISER**

**Edit profile**

**COMMUNITY FOUNDATION SERVING WESTERN VIRGINIA**

**COMMUNITY FOUNDATION**  
SERVING WESTERN VIRGINIA

**\$0.00 contributions** **0 donors**

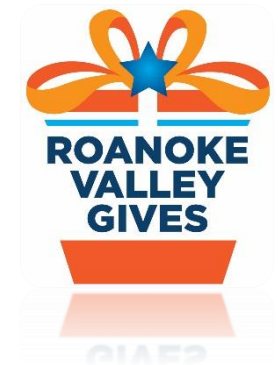
[Share](#) [Tweet](#) [Pin](#) [Email](#)

Community Foundation Serving Western Virginia (formerly Foundation for Roanoke Valley) has played a very significant role in keeping the Roanoke Valley's nonprofits healthy for three decades. We make life-changing grants each year to hundreds of organizations - from helping the poor, to educating children, to preserving the environment, to keeping the elderly safe, to so much more. Our focus is on making sure that as much grant money as possible flows from our endowments out to worthwhile and needed programs.

Additionally, the Community Foundation is a wide-ranging and complex 501(c)3 nonprofit that offers a multitude of additional services and resources to the community that extend beyond our grant making efforts. We are truly the center for philanthropy that strengthens the Valley in ways both seen and unseen.

# 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

Click & Pledge | GiveBri... X

res

**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

**Together we Raised**  
*Not available in admin mode*

Close Setting

Profile | Network URL | Share Message | Donate Now | Keywords & Tags | Fundraiser Setting | Fundraisers List

Enter your nonprofit's information here to create your profile page. Organization Information supplied at application (name, address, EIN#, website, and contact email), Summary of your nonprofit, Description (This is the body of your page. You may include text, images, and videos here. Best practice is to copy and paste text from Notepad or Wordpad), Avatars are Images/logos that visually represent your organization). Click SAVE to update. **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.**

Organization "Display" Name: (200 characters)\*  
Foundation for Roanoke Valley

Show organization information

Hide Statistic (Contribution total and donor count)

Hide Live Stream (Stream of donors' names, amounts and transaction date)

Hide Donor Comments

Target: \$  
(your fundraising goal)  
0.00

Summary:  
(Approximately 200 characters)

Source | [Rich Text Editor Icons]

Tomorrow will always bring new needs and opportunities. Be the key to moving the community forward!

\$10  
 \$25  
 \$50  
 \$100  
 \$ Other:

Make this donation:  
One time only

**DONATE**

**BECOME A FUNDRAISER**

**MOST ACTIVE FUNDRAISERS:**

[Profile Pictures]



# 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](http://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.

Profile Network URL Share Message Donate Now Keywords & Tags Fundraiser Setting Fundraisers List

Enter your nonprofit's information here to create your profile page. Organization Information supplied at application (name, address, EIN#, website, and contact email), Summary of your nonprofit, Description (This is the body of your page. You may include text, images, and videos here. Best practice is to copy and paste text from Notepad or Wordpad), Avatars are Images/logos that visually represent your organization). Click SAVE to update. 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.

---

Organization "Display" Name: (200 characters)\*  
Foundation for Roanoke Valley

Show organization information  
 Hide Statistic (Contribution total and donor count)  
 Hide Live Stream (Stream of donors' names, amounts and transaction date)  
 Hide Donor Comments

---

Target: \$  
(your fundraising goal)  
0.00

Summary:  
(Approximately 200 characters)

Source

Format Font Size

For more than 28 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.

---

Description:  
(Approximately 3000 characters)

Source

Format Font Size

Foundation for Roanoke Valley has played a very significant role in keeping the Roanoke Valley's nonprofits healthy for nearly three decades. We make life-changing grants each year to hundreds of organizations - from helping the poor, to educating children, to preserving the environment, to keeping the elderly safe, to so much more. Our focus is on making sure that as much grant money as possible flows from our endowments out to worthwhile and needed programs.

Additionally, the Foundation is a wide-ranging and complex 501(c)3 nonprofit that offers a multitude of additional services and resources to the community that extend beyond our grant making efforts. We are truly the center for philanthropy that strengthens the Valley in ways both seen and unseen.

So, if the Foundation has lots of assets, why do we need operating support?

The Foundation is a public charity, just like our grantee nonprofits. Tasks such as carrying out the full scope of our work, retaining a small but high-quality professional staff, and staying on the leading edge of service to our donors and the community carries associated costs.

We operate frugally - less than 1.5 cents on the dollar of assets. The modest administrative assessment on our endowments, combined with an administrative endowment fund, covers about 92% of our operating budget, so we must raise the remaining amount each year from community support.

On this Roanoke Valley Gives Day, please consider a gift to our operating needs. Your contribution will provide

## MAKE A DIFFERENCE TODAY!

Tomorrow will always bring new needs and opportunities. Be the key to moving the community forward!

- \$10
- \$25
- \$50
- \$100

\$ Other:

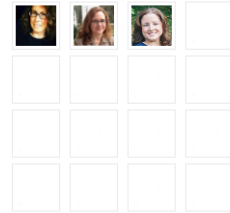
Make this donation:

One time only

DONATE

BECOME A FUNDRAISER

### MOST ACTIVE FUNDRAISERS:



### Organization Information:

Foundation for Roanoke Valley

P.O. Box 1159  
Roanoke, Virginia 24006

EIN: 54-1959458

<http://www.foundationforroanokevalley.org>

### Summary:

For more than 28 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.

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



**DONATE**  
Browse causes by category  
**Participating Organizations**  
Give to your favorite Roanoke Valley nonprofit!

**Register**  
Register your Nonprofit.  
**Nonprofit Toolkit**  
Resources for Nonprofits

Avatar

Organization Display Name

SEARCH RESULTS



FOUNDATION FOR ROANOKE VALLEY

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.

**DONATE NOW**  
raised \$3,875.00

Organization Summary



F.R.E.E. FOUNDATION

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.

**DONATE NOW**  
raised \$200.00



CARLY OLIVER

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

**DONATE NOW**  
raised \$520.00

THE RESCUE MISSION OF ROANOKE

**\$57,200.00 contributions** **177 donors**

Raised: \$57,200 Remaining: \$0

Share Tweet Pinterest Google+ LinkedIn

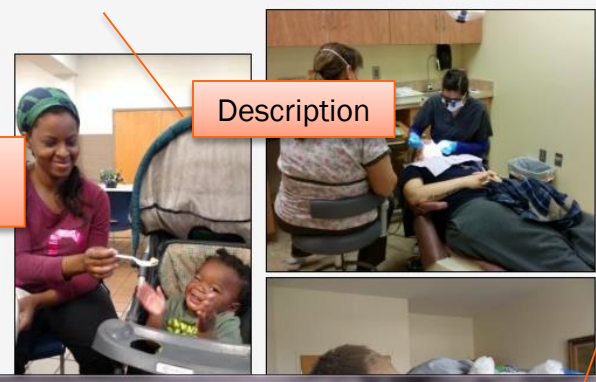
Target

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.

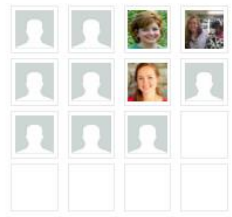
- \$25 - Provides a day at summer camp for a child
- \$50 - Provides clothing vouchers for a family of five
- \$100 - Provides one day of poverty for a man or woman
- \$1000 - Provides 4,000 meals

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!



**DONATE**  
Browse causes by category  
**Participating Organizations**  
Give to your favorite Roanoke Valley nonprofit!

**Register**  
Register your Nonprofit.  
**Nonprofit Toolkit**  
Resources for Nonprofits

**Together we Raised**  
*Not available in admin mode*

Close Setting

Profile | Network URL | Share Message | Donate Now | Keywords & Tags | Fundraiser Setting | Fundraisers List

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

Facebook URL:

Twitter URL:

YouTube URL:

Blog URL:

**SAVE**

**MAKE A DIFFERENCE TODAY!**

Tomorrow will always bring new needs and opportunities. Be the key to moving the community forward!

\$10  
 \$25  
 \$50  
 \$100  
 \$ Other :

Make this donation:

**DONATE**

**BECOME A FUNDRAISER**



Your organization's social media accounts will appear on your respective profile page.

# 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 supercharging 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.**

Close Setting

Profile | Network URL | Share Message | Donate Now | Keywords & Tags | Fundraiser Setting | Fundraisers List

**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.

Message Title:  
(Maximum 100 characters)  
Make a Difference Today!

Description:  
(Maximum 1000 characters)  
Join me in being a part of a movement to raise money for Roanoke Valley nonprofit organizations in 24 hours!! Foundation for Roanoke Valley is super-charging local giving by hosting Roanoke Valley's first-ever "Roanoke Valley Gives" day on March 15, 2017.  
Your donation goes a long way!! Go to <https://rvgives.givebig.org> to learn

**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.

Message Title:  
(Maximum 100 characters)  
Join me and support Foundation for Roanoke Valley!

Description:  
(Maximum 1000 characters)  
I just donated to support Foundation for Roanoke Valley! Join me and be a part of the movement to raise funding for Roanoke Valley nonprofit organizations in 24 hours!  
Support Foundation for Roanoke Valley's Administrative Fund here: <https://rvgives.givebig.org/c/rvgives/a/rvgives!!!> Be the key to moving the

SAVE

**MAKE A DIFFERENCE TODAY!**

Tomorrow will always bring new needs and opportunities. Be the key to moving the community forward!

\$10  
 \$25  
 \$50  
 \$100  
 \$ Other:

Make this donation:  
One time only

DONATE

Post to Facebook - Google Chrome

<https://www.facebook.com/sharer.php?u=https://shar.es/1DY1N2&t=>

Share on Facebook

Share on your own Timeline

Carly Craft Oliver  
Say something about this...

**JOIN US FOR ROANOKE VALLEY GIVES**  
O3.16.16  
IT'S EASY. POINT. CLICK. GIVE.  
[rvgives.givebig.org](http://rvgives.givebig.org)

**Make a Difference Today!**  
Join me in being a part of a movement to raise money for Roanoke Valley nonprofit organizations in 24 hours!! Foundation for Roanoke Valley is super-charging local giving by hosting Roanoke Valley's first-ever "Roanoke Valley Gives" day on March 16, 2016. Your donation goes a long way!! Go to [RVGIVES.GIVEBIG.ORG](http://RVGIVES.GIVEBIG.ORG)

Friends | Cancel | Post to Facebook

by name, keyword, county, or zip code

**DONATE**  
Browse causes by category

**Register**  
Register your Nonprofit.

**Participating Organizations**  
Give to your favorite Roanoke Valley nonprofit!

**Nonprofit Toolkit**  
Resources for Nonprofits

FOUNDATION FOR ROANOKE VALLEY

5,000 contributions | 46 donors

Share 3 | Tweet 0 | Pinterest 0 | Google + 0 | LinkedIn 0

Share options are available on all profile pages.

You may remember Underdog, for whom a booming voice would cry out: "There's no need to fear - Underdog is here!" Or perhaps Mighty Mouse, who would staunchly and lyrically proclaim "Here I am to save the day!" Harmless cartoon fantasies acted out in a world much different than our own.

Or, are there indeed superheroes amongst us? We would propose that the many folks who support the Foundation's Community Enrichment Fund are regularly dispelling fear and saving the day for countless children, families and older adults!

Each year, the Foundation receives far more grant requests from the nonprofit community than it can support. By supporting the Foundation's Community Enrichment Fund, you are giving us the wherewithal and the flexibility to identify major gaps in services throughout the year and then to actively pursue solutions through well-considered grants.

# 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!

Close Setting

Profile Network URL Share Message Donate Now Keywords & Tags Fundraiser Setting Fundraisers List

Customize the donation fields inside the donation widget on the right. You may edit heading, description, amounts and their descriptions (Suggested minimum donation amount is \$10), and opt to offer recurring donations. Click SAVE to update.

Hide widget at profile Page

Hide widget at fundraiser profile Page

Heading:  
MAKE A DIFFERENCE TODAY!

Description:  
Tomorrow will always bring new needs and opportunities. Be the key to moving the community forward!

Item 1:  
Amount: \$10 Text: INSERT TEXT HERE OR LEAVE BLANK  
SKU: \_\_\_\_\_

Item 2:  
Amount: \$25 Text: \_\_\_\_\_  
SKU: \_\_\_\_\_

Item 3:  
Amount: \$50 Text: \_\_\_\_\_  
SKU: \_\_\_\_\_

Item 4:  
Amount: \$100 Text: \_\_\_\_\_  
SKU: \_\_\_\_\_

Recurring Options

One time  
 Weekly - Disabled by parent organization  
 2 Weeks - Disabled by parent organization  
 Monthly  
 2 Months - Disabled by parent organization  
 Quarterly  
 6 Months  
 Annually

Campaign:  
(Maximum 80 characters)  
\_\_\_\_\_

Tracker:  
(Maximum 50 characters)  
\_\_\_\_\_

SAVE

DO NOT select either option

Make sure to select appropriate recurring options. Less is better.

Leave “Campaign” and “Tracker” fields blank

**MAKE A DIFFERENCE TODAY!**

Tomorrow will always bring new needs and opportunities. Be the key to moving the community forward!

\$10  
 \$25  
 \$50  
 \$100  
 \$ Other: \_\_\_\_\_

Make this donation:  
One time only

DONATE

BECOME A FUNDRAISER

**MOST ACTIVE FUNDRAISERS:**


**Organization Information:**  
Foundation for Roanoke Valley  
P.O. Box 1159  
Roanoke, Virginia 24006  
EIN: 54-1959458  
<http://www.foundationforroanokevalley.org>  
Summary:

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.

# 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!!**

Close Setting

Profile Network URL Share Message Donate Now **Keywords & Tags** Fundraiser Setting Fundraisers List

Keywords and Tags are very important. Keywords allow your organization to be searchable on the website. Tags will allow your organization to appear under nonprofit categories. In keywords enter your nonprofit's name, service area county (or counties), zip code(s), and other keywords that apply. Separate all keywords with a semicolon [;]. For Tags, click on a tag that applies to your organization, click on the > arrow to bring them into the field on right. Repeat with other tags. Please only select tags that apply to your nonprofit. Click SAVE to update.

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Keywords: Enter the appropriate words for which you will be found in searches. Separate each with a ";" (semicolon). Be sure to include your name, your zipcode, your county as well as keywords. (Maximum 15000 characters)

community foundation; frv; FRV; Roanoke Valley; foundation; community; unrestricted; unrestricted fund; community fund; FFRV; The Foundation; Foundation for Roanoke Valley; The Foundation for the Roanoke Valley; 24011; 24006; Roanoke City; City of Roanoke; endowment; giving; catalyst; GTLN; foundation; roanoke valley gives; give big foundation; perpetuity; fund; the roanoke foundation; roanoke foundation; roanoke; city of roanoke; roanoke city; 24006; 24011

Tags: "Click on a tag/category that applies to your organization, click on the > arrow to bring them into the field on right. You can multi-select or repeat with each appropriate tag/category. Please only select those that apply to your nonprofit. Click SAVE to update."

Animals  
Arts & Cultural  
Education  
Environment  
Health & Human Services  
Housing & Homelessness

Community Development & Civic A

SAVE

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!)

Close Setting

Profile | Network URL | Share Message | Donate Now | Keywords & Tags | **Fundraiser Setting** | Fundraisers List

By checking **Accepting fundraiser** 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. Click **SAVE** to update.

**Accept fundraisers**  
By checking this box, you will agree to accept fundraisers for your organization.

**Automatic approval**  
Checking this option will automatically approve anyone requesting to become fundraiser for your organization.

Fundraiser page header:  
This is how your fundraiser page will be titled. It will appear above your nonprofit’s name. For example you could use something like “I am a fundraiser for” or “I support”.  
(Maximum 75 characters)  
I support Foundation for Roanoke Valley!

**SAVE**

**MAKE A DIFFERENCE TODAY!**

Tomorrow will always bring new needs and opportunities. Be the key to moving the community forward!

\$10  
 \$25  
 \$50  
 \$100  
 \$ Other:

Make this donation:  
One time only

**DONATE**

**BECOME A FUNDRAISER**

**MOST ACTIVE FUNDRAISERS:**

I support Foundation for Roanoke Valley  
Foundation for Roanoke Valley

0
  0
  0
  0
  0

Raised: \$520 Remaining: \$0

Foundation for Roanoke Valley has been serving this region for over 27 years, and I am proud to be associated with such a fantastic organization!

**On March 16, please help me raise \$500 to support our Community Enrichment Fund which allows the Foundation to help meet the immediate needs of the communities we serve.**

Whether it is underwriting employment training for homeless veterans when hope is lacking; or sparking a passion for Science and Technology in underprivileged children when they are in danger of being left behind; or buying specialized equipment so a special-needs infant can have a better life; or ensuring that folks lacking dental care for decades can get new dentures; or making sure families have proper nutrition when the cupboards begin to get bare; or placing AED equipment in facilities otherwise vulnerable to being caught unprepared for a medical emergency; and... The list goes on and on!

Not only will your contribution help the communities we serve, it will also help me from getting a pie to the face!! That’s right!!! My very own colleague, Michelle Eberly, and I are on a mission to see who can reach \$500 the fastest! And the loser....well, she gets a pie to the face!

**Carly Oliver**  
is fundraising for  
Foundation for  
Roanoke Valley

Foundation for Roanoke Valley has been serving this region for over 27 years! I have been a part of this great organization for over 11 years. I can honestly say that I have the BEST job in Roanoke! Please help me raise funds for our Community Enrichment Fund!

**MAKE A DIFFERENCE TODAY!**

Tomorrow will always bring new needs and opportunities. Be the key to moving the community forward!

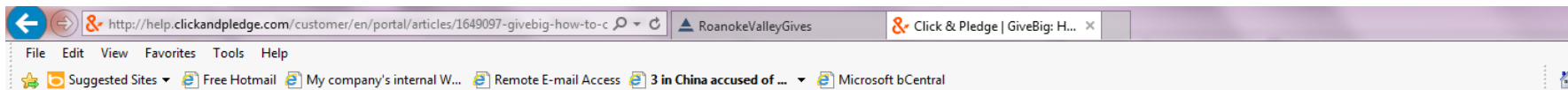
\$10  
 \$25  
 \$50  
 \$100  
 \$ Other:

Make this donation:  
One time only

**DONATE**



# FUNDRAISER RESOURCES



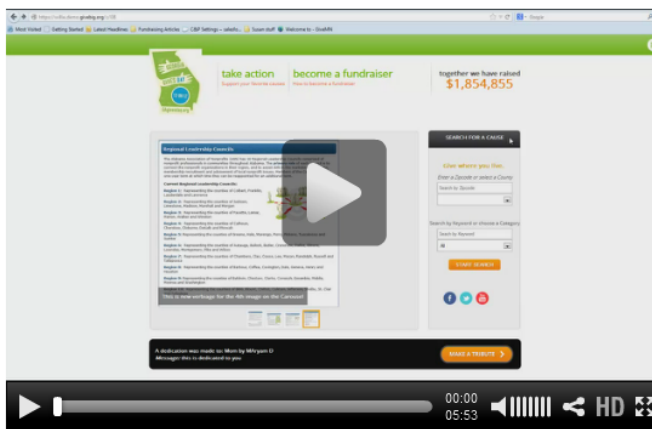
## GiveBig: How To Create A Personal Fundraiser Page

Last Updated: Oct 18, 2016 10:24AM EDT

### Want to help a cause you believe in?

It is EASY

1. Choose an Organization, Fund or Program, and click the 'Become a Fundraiser' button
2. Create your own fundraiser page
3. Share your page with friends and family through email, social networks and more



### To Get Started

Step 1: Find an Organization, Fund or program you wish to support by using the search fields on the right side of the home page.

Step 2: Once you find your cause click on the 'Become a Fundraiser' button. Note: A nonprofit or an organization may choose not to accept fundraisers. If this is the case, the 'Become a Fundraiser' button will not be visible.

Step 3: Enter your name and email to register. If the organization or program is set up to automatically accept fundraisers you will see a page to complete your registration. If the organization or program manually accepts fundraisers, you will see a note stating that you will receive an email when your registration is approved. In both cases, you will receive an email to complete your registration.

Step 4: Check your email. You will be sent an email from GiveBig with a verification code to complete your registration. Use the link on the email to complete your registration.

## Contact Support

CREATE TICKET: FREE SUPPORT

Join Live Support  
3:00-3:30 ET Monday-Thursday  
Premier Support Options

## Other Resources

User Forum  
Online Manual  
Webinar Recordings  
Salesforce: Power of Us Hub  
Swiper1: Supported Phone and Tablets

For more information, visit  
[www.help.clickandpledge.com](http://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.



**DONATE**  
Browse causes by category

**Participating Organizations**  
Give to your favorite Roanoke Valley nonprofit!

**Register**  
Register your Nonprofit.

**Nonprofit Toolkit**  
Resources for Nonprofits

**Together we Raised**  
*Not available in admin mode*

FOUNDATION FOR ROANOKE VALLEY

\$3,875.00 contributions 46 donors

You may remember Underdog, for whom a booming voice would cry out: "There's no need to fear - Underdog is here!" Or perhaps Mighty Mouse, who would staunchly and lyrically proclaim "Here I am to save the day!" Harmless cartoon fantasies acted out in a world much different than our own.

Or, are there indeed superheros amongst us? We would propose that the many folks who support the Foundation's Community Enrichment are the real heroes, fear and saving the day for countless children, families, and communities.

Each year, the Foundation receives far more grant requests from the nonprofit world. By supporting the Foundation's Community Enrichment, you are giving us the wherewithal and the flexibility to identify and address the most urgent needs throughout the year and then to actively pursue solutions and programs to address them.

MAKE A DIFFERENCE TODAY!

Tomorrow will always bring new needs and opportunities. Be the key to moving the community forward!

\$10

\$25

\$50

\$100

\$ Other:

Make this donation:



Setting

FOUNDATION FOR ROANOKE VALLEY

\$3,875.00 contributions 46 donors

**YOUR DONATION**

Donation Amount \* :

Make this donation:

Make this donation anonymously ?

Make this a dedication to someone

**PAYMENT DETAILS**

# 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**  
Browse causes by category

**Participating Organizations**  
Give to your favorite Roanoke Valley nonprofit!

**Register**  
Register your Nonprofit.

**Nonprofit Toolkit**  
Resources for Nonprofits

Close Setting

Basic setting | Salesforce Campaign | Payment Types | Custom Questions | Download fundraiser activity | Report

Checkout Page Name:  
(Maximum 50 characters)  
Foundation for Roanoke Valley

Checkout Page ID: (Read-only)  
[REDACTED]

Donation for:  
(Maximum 50 characters)  
Community Enrichment Fund

Donation Scheduling  
 Allow

Campaign:  
(Maximum 80 characters)  
[REDACTED]

# 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.

Basic setting | Salesforce Campaign | Payment Types | Custom Questions | Download fundraiser activity | Report

Checkout Page Name:  
(Maximum 50 characters)  
Foundation for Roanoke Valley

Checkout Page ID: (Read-only)  
[REDACTED]

Donation for:  
(Maximum 50 characters)  
Community Enrichment Fund

Donation Scheduling  
 Allow

Campaign:  
(Maximum 80 characters)  
[REDACTED]

Salesforce Campaign ID:  
(Maximum 20 characters)  
[REDACTED]

SKU:  
(Maximum 100 characters)  
[REDACTED]

Tracker:  
(Maximum 50 characters)  
[REDACTED]

Basic Setting

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](http://help.clickandpledge.com) for complete instructions on Receipt Building.

SKU:  
(Maximum 100 characters)

Tracker:  
(Maximum 50 characters)

Fraud Profile:

Standard default policy ▼

Receipt Template:

GiveBig Receipt ▼

Receipt Subject:  
The following parameters may be used as wild cards in the subject  
- Patron Full Name: {PatronFullName}  
- Patron Email: {PatronEmail}  
- Total Charged: {TotalCharged}

Receipt: [Foundation for Roanoke Valley]

Receipt Header:  
(Maximum 800 characters)

Thank you for supporting Foundation for Roanoke Valley's Administrative Operating Fund! Your gift will provide that critical difference to help keep the Foundation strong and thriving, so we can continue to meet the long-term needs of the Roanoke Valley! Your support is greatly appreciated!

Foundation for Roanoke Valley provided no goods or services in consideration of the contribution referenced below. The Foundation is a 501(c)(3) public charity, and gifts made to it are tax-deductible to the maximum extent

Notification List:  
Add the email address of each person who should receive notification whenever a patron completes a transaction. Remember to separate email addresses with a semicolon.  
(Maximum 500 characters.)

cc  
y:  
to:

SAVE

# DONATIONS – SALESFORCE CAMPAIGN

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



## DONATE

Browse causes by category

## Participating Organizations

Give to your favorite Roanoke Valley nonprofit!

## Register

Register your Nonprofit.

## Nonprofit Toolkit

Resources for Nonprofits

## Together we Raised

*Not available in admin mode*

Close Setting

Basic setting

Salesforce Campaign

Payment Types

Custom Questions

Download fundraiser activity

Report

In Salesforce campaigns may be set up for the entire transaction as well as each item. The following fields are used for the Transaction and will post to Salesforce as described below:

- Campaign Id: Salesforce "Campaign Id" will be matched against Salesforce campaigns. If the Campaign Id is not found, campaign name will be used for matching. If neither the Id nor the campaign name are found, a new campaign will be created with the name as listed in the Campaign name.
- Fundraiser campaign follows the same rule as stated above. The fundraiser will become a campaign member.

### Transaction

Campaign Name:  Campaign ID:

### Fundraiser

Campaign Name:  Campaign ID:

SAVE

### Organization Information:

Foundation for Roanoke Valley

P.O. Box 1159  
Roanoke, Virginia 24006

EIN: 54-1959458

<http://www.foundationforroanokevalley.org>

### Summary:

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.

# 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!

Close Setting

Basic setting | Salesforce Campaign | **Payment Types** | Custom Questions | Download fundraiser activity | Report

Payment Types:

Payment Type	Accept	Last Updated
American Express	<input checked="" type="checkbox"/>	7/22/2015
MasterCard	<input checked="" type="checkbox"/>	7/22/2015
VISA	<input checked="" type="checkbox"/>	7/22/2015
Discover	<input checked="" type="checkbox"/>	7/22/2015
Invoice	<input type="checkbox"/>	7/22/2015
Purchase Order	<input type="checkbox"/>	7/22/2015
eCheck	<input type="checkbox"/>	7/22/2015

**UPDATE**

# 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**.



Close Setting

Basic setting | Salesforce Campaign | Payment Types | Custom Questions | Download fundraiser activity | Report

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. Use the **Mandatory** checkbox to make a question required. If a question is mandatory, then a transaction cannot complete until an answer is entered. Use **Display Order** to order your questions. Click **SAVE**.

Question: (Maximum 50 characters)

Select Type

- TextBox
- Pick List
- TextBox
- Multiline TextBox (500 characters) help your patron answer the question.
- Radio Button
- Check box

Display Order:

Is the answer mandatory?:

**CLEAR** **SAVE**

	Question	Display Order
Edit Delete	Would you like to learn more about the Foundation?	1
Edit Delete	Would you like a copy of our Annual Report?	2

“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.

Make this donation anonymously

Make this a dedication to someone

### PAYMENT DETAILS

First Name \* :

Last Name \* :

Email \* :

Address \* :

City \* :

State :

Phone \* :

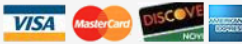
Zip / Postal code \* :

Country \* :

Your public posted comment :

Would you like to learn more about the Foundation? :

Would you like a copy of our Annual Report? :



Name on the card \* :

Card number \* :


Expiration date \* :

Security code (CV2) \* :

Charge Date:

**SUBMIT**

## 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)

Close Setting

Basic setting | Salesforce Campaign | Payment Types | Custom Questions | **Download fundraiser activity** | Report

From:

To:

**DOWNLOAD**

## Organization Information:

Foundation for Roanoke Valley

P.O. Box 1159  
Roanoke, Virginia 24006

EIN: 54-1959458

<http://www.foundationforroanokevalley.org>

## Summary:

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 community needs.

Report - Microsoft Excel

	A	B	C	D	E	F	G	H	I
1	TotalRaised	TransactionCount	FundraiserAliasName	FundraiserLastName	FundraiserFirstName				
2	610	12	fundraiser1	Jones	Don				
3	520	17	fundraiser2	White	Patricia				
4									
5									
6									

# 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

Close Setting

Basic setting | Salesforce Campaign | Payment Types | Custom Questions | Download fundraiser activity | **Report**

From:

To:

**DOWNLOAD**

## Organization Informa

Foundation for Roanoke

P.O. Box 1159  
Roanoke, Virginia 24006

EIN: 54-1959458

<http://www.foundationf>

## Summary:

For more than 27 years,  
Roanoke Valley has been  
leadership, resources and  
philanthropy in the com

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

# DONATIONS – REPORT

https://rvgives.givebig.org/c/rvgives/p/nonprofittoolkit/

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

11  
DAYS

10  
HOURS

52  
MINS

43  
SEC



## DONATE

Browse causes by category

## Participating Organizations

Give to your favorite Roanoke Valley nonprofit!

## Register

Register your Nonprofit.

## Nonprofit Toolkit

Resources for Nonprofits

Together we Raised

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

### Register Your Nonprofit

REGISTRATION FOR ROANOKE VALLEY GIVES 2019 IS CLOSED. [PLEASE NOTE: If your organization participated last year and your Click & Pledge account is still active you DO NOT need to register again.](#)

### Roanoke Valley Gives Guidelines 2019 and Incentive Prize Schedule

This document includes all Roanoke Valley Gives rules and prize schedules. (FINAL INCENTIVE PRIZE SCHEDULE ABOVE!!!)

### Adding a User to your Roanoke Valley Gives Account

Organizations may need to add people, or "Users," to their Click & Pledge accounts. By default the person who sets up the account is considered the primary user. Once the account is open that person can add other individuals as "Users" to the account. This tutorial can also be used to remove "Users."

### Nonprofit FAQs

### How to Get Technical Assistance (NEW!)

Need technical assistance? You are in the right place!

### Roanoke Valley Gives 2019 Interactive Workbook

This is an interactive document that helps create, plan and implement your Roanoke Valley Gives day!

Technical Support

experts stay on the call until everyone has an answer or a plan. Please include your full name and Organization when you join the meeting.

#### 4. Email the Community Foundation.

Community Foundation staff can try to assist you during regular business hours (8:30am-5pm). Contact Carly Oliver at [carly@cfwesternva.org](mailto:carly@cfwesternva.org) or call 540-985-0204.

**PLEASE NOTE:** If you have questions on Roanoke Valley Gives Day, we will most likely refer you to Click & Pledge to resolve the issue.

#### TECHNICAL SUPPORT RESOURCES:

##### SETTING UP YOUR ROANOKE VALLEY GIVES PAGE:

- [How to login](#)
- [How to add a user to your account](#)
- [How to set up your nonprofit profile page, step by step](#)
- [Tips for adding images/logos](#)
- [Tips for adding a video](#)
- [How to customize your Roanoke Valley Gives receipt](#)
- [How to create a Facebook giving day ad](#)
- [How to create a custom donations page on your website](#)
- [How to run a giving day report](#)
- [How supporters can create their own individual fundraising page](#)
- [How to Build Out Your Profile Page](#)

##### THE WEEK / DAY OF GIVEIGNRV

- [Donation Scheduling - Overview and Management](#)  
When donors want to pre-schedule their donations
- [How to make sure multiple transactions can occur on a public computer](#)
- [How to credit a transaction](#)  
When a donor makes a mistake and you need to credit their transaction.