

Understanding Your Giving Day Master Dashboard

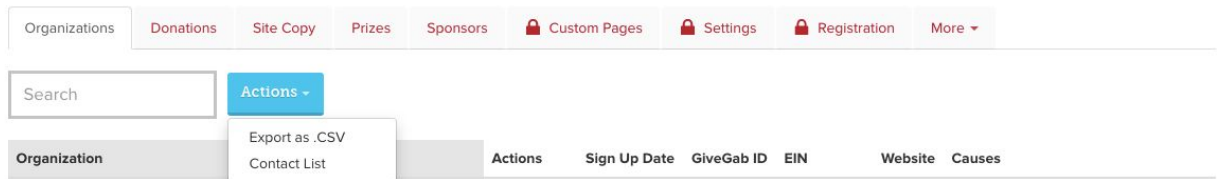
The purpose of this guide is to help you understand and navigate the different tabs within your Master Dashboard. Below you will find explanations of each tab and how it controls and impacts the site layout/setup.

In addition to this document, you can take a virtual tour using the blue chat bubble which will provide an overview of each tab.



“Organizations” Tab



Lists all organizations that have registered for your giving day, including information collected through the Registration Survey



From this tab, you can:

- 1) Export the list of registered organizations as a .CSV using the “Export as .CSV” option under the Actions button. This list will include the contact information for the individual who registered the organization for the giving day. This list will be sent to the email address connected with your GiveGab account.
- 2) Export a list of the admin contacts for each registered organization using the Contact List under the Actions button.
- 3) Search for a registered nonprofit using the search box in the left-hand corner.

- 4) If the nonprofit approval process is used, this is where you can change the registration status for each organization through the Status dropdown

Organization	Actions	Status	Sign Up Date	GiveGab ID	EIN	Most recent 990	Photo ID	Please upload a newspaper c...	Website	Causes	Administrato
Aussie Roos	  	In Review 	6/21/2019	3398	--	--	--				Denis Tomazz denis.tomazzi

- 5) Under the “Actions” column, you can use the pencil icon to make an internal note about the organization, and the x icon will remove the organization from the Giving Day

Explanation of .CSV fields

- Sign Up Date: The date the organization signed up for your Giving Day.
- Organization: The name of the organization. You can also click on the organization name to view their giving day profile.
- Website: A link to the organization’s website.
- Causes: Lists the causes that the organization selected.
- Admin Name: The name of the individual that registered their organization for your giving day. Please note that there could be more than one admin tied to a giving day profile.
- Admin Email: The email address of the individual that registered their organization for your giving day.
- Donatable: If “Yes” is listed, the organization has been verified by GiveGab and is eligible to participate in your giving day. If “No” is listed, the organization has not yet added their bank account, been verified by our payment processor, Stripe, or has entered in an incorrect EIN.
 - Note: If an organization’s information is lapsed from previous years, meaning they need to add updated verification information, the organization will show up as donatable even if they technically are not. Your project manager can help keep you updated on which organizations are “lapsed”.
- Customized Profile: If “Yes” is listed, an organization has uploaded their logo, added a tagline, and added a story. If “No” is listed, then they have not completed these three tasks.
- Amount Raised: Displays the online dollar amount raised by the organization.
- Donors: Displays the number of online donors that have given to the organization.
- Address Fields: These fields display the physical address of the nonprofit, as it was entered in during the registration process.
- Optional Fields:

- Fee Paid: Lists the amount the organization paid to register for your giving day. Only applicable if there is a registration fee to participate in the day.
- Registration Questions: Any questions asked during the registration process will appear as columns in this .CSV report.

“Donations” Tab

View all donations made through your giving day platform.

The screenshot shows the 'Donations' tab interface. At the top, there are navigation tabs: Organizations, Donations (selected), Site Copy, Prizes, Sponsors, Custom Pages, Settings, Registration, and More. Below the tabs is a search bar with the text 'Search name or email'. To the right of the search bar are two dropdown menus: 'Any Donation Type' and 'Any Release Status'. A blue 'Actions' button is located to the right of the second dropdown. Below the search and filter area, a note states: 'Note: Dates and times on this page are displayed in your computer's time zone.' Below the note is a table with the following columns: Actions, Status, Batch ID, Donation ID, Date, Donor, Donor Address, Display Name, and Organization. The table contains one row of data.

Actions	Status	Batch ID	Donation ID	Date	Donor	Donor Address	Display Name	Organization
	released		15151	7/16/2019 10:51:59am	Denis Tomazzi denis.tomazzi@givegab.com	213 N Cayuga St Ithaca , New York 14850 United States		

From this tab you can:

1. Search donations by name or email
2. Filter donations by Type or Release Status
 - a. Type
 - i. “Any Donation Type” - a list of all of the donations made on the Giving Day
 - ii. “Online” - all donations made through the Giving Day site
 - iii. “Offline” - all donations recorded through the GiveGab platform that were given to organizations through check or cash
 - iv. “Offline - Matches & Challenges” - Matches and Challenges are offline donations since they are given to organizations through cash or check. This will show all of those amounts
 - v. “Offline - Giving Day Prizes” - Prizes are offline donations, as they are given to organizations outside of the GiveGab platform. If the amounts are recorded to the Giving Day totals, then you will be able to see all of the Prize gifts here.
 - vi. If you have DAF on your Giving Day, there will be a “Offline- Donor Advised Funds” section for you to navigate your DAF donations
 - b. Release Status
 - i. “Any Release Status” - all of the donations will be shown
 - ii. “ Pending” - If any of the offline donations are in a pending state (regarding offline donations) then they will be listed here.
 - iii. “Released” - When donations are “Released” (offline donations that have been added to the giving day) they will be shown in this list

3. Add a single offline donation through the Add Offline Donation option under the Actions button.
4. Bulk Upload offline Donations through the Upload Offline Donations option under the Actions buttons
5. Make a Bank Transfer through the Bank Transfer option under the Actions button
6. Change the status of a batch offline upload through the Batch Update option under the Actions button.
7. Export the donations report as a .CSV file under the Actions button. This report will be sent to the email address connected with your GiveGab account.

Explanation of .CSV fields:

- Donation Date: The date the donation was made.
- Time: The time the donation was made. The time is displayed based on the timezone that your computer is set to.
- Last Name: Last name of the donor.
- First Name: First name of the donor.
- Email: Donor's email address.
- Organization: The name of the organization the donor gave to.
- Campaign: The name of your giving day or the name of the campaign that an organization set up for the giving day.
- Amount Charged: The amount charged to the donor's credit card. Note that this amount includes the intended donation, platform fees, and credit card fees.
- Platform Fee: The GiveGab fee amount.
- Credit Card Fee: The credit card fee amount.
- Donor Covered Fees?: If "Yes" is displayed, the donor elected to cover the platform and credit card fees. If "No" is displayed, the donor did not cover the fees.

"Site Copy" Tab

This tab allows you to edit and preview the copy that appears on your giving day's landing page during each of the three site phases.



Giving Day Dashboard for
#iGiveCatholic
View Site

- Organizations
- Donations
- Site Copy
- Prizes
- Sponsors
- Custom Pages
- Settings
- Registration
- More ▾

Please note: changes may sometimes take a few minutes to appear live on the site.

Registration Landing Page

Giving/Everyday Landing Page

<p>Tagline Appears as larger text near the top of the page</p> <input #givingtuesday="" catholic"="" during="" give="" new"="" on="" type="text" value="Join Us! "/>	<p>Donation Button Customize your donation button text</p> <input type="text" value="Give Back"/>
<p>About #iGiveCatholic A short description of your giving day</p> <input catholic"="" give="" on"="" type="text" value="Celebrated annually on the Tuesday following Thanksgiving, #iGiveCatholic is the first-ever online giving day that celebrates our unique Catholic heritage and inspires the faithful to "/>	<p>Video YouTube or Vimeo URL</p> <input type="text"/> <small>This requires the embeddable version of the video URL, e.g. https://www.youtube.com/embed/abcdefghijkl.</small>

You are also able to additionally update the Donation Form and Receipt Thank You message, video, dedication email, and disclaimer.

You can also update the contact information in the footer of the landing page through the “Contact Information” tab. Unlike in the other sections, one can use basic HTML in the “Contact Information” tab. This allows for things such as hyperlinking, bold or text size changes.

“Prizes” Tab (as of 8/2)

This tab allows you to create and award prizes.

Prizes

The order in which prizes appear in this list will match the order they appear on the Giving Day site.

Prize Name	Sponsor	Winners	Highlight	Actions
<h3>Prize Information</h3> <p>Title</p> <input type="text" value="Grand Prize"/> <p>Type</p> <input type="text" value="Cash"/> <p>Prize (optional)</p> <input type="text" value="\$10,000"/> <p>Winner Selection Strategy</p> <input type="text" value="Most Raised"/> <p>Description</p> <p>You can put any information here that isn't represented by other fields. For example, very specific legal requirements that the other prizes don't have.</p> <input type="text" value="Kick off day 2 with a jolt of giving! Prize awarded to the organization raising the most money online from 8:00am - 9:00am on May 5"/> <p>*This prize was awarded based on results through 8:00pm on May 2nd.</p> <p>Image</p>				

To set up a prize: you will use the button for **"Add New Prize."** Once you click that button, the grey dropdown will appear with all the information to configure your prize. Here's how to add your prize:

Organizations Donations Site Copy Prizes Sponsors Custom Pages Settings Registration More ▾

Prizes

The order in which prizes appear in this list will match the order they appear on the Giving Day site.

Prize Name	Sponsor	Winners	Highlight	Actions
Add New Prize				View Page

Prize Winners

Reveal Prizes Page

Prize page copy

You can add rules, explanations, or disclaimers about prizes here. Appears at the bottom of the page.

[Save](#)

Prize Information

Title

Type

Cash

Prize (optional)

ex: '\$50.00, or '1 hour of radio time'

Winner Selection Strategy

Manual

Max Winners (optional)

1

Description

You can put any information here that isn't represented by other fields. For example, very specific legal requirements that the other prizes don't have.

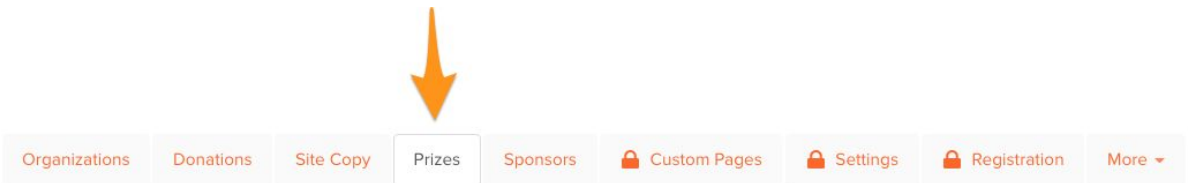
1. "Type" will automatically default to Cash, but you can select the "Goods/Services" option in the dropdown for your non-cash prizes.
2. You can then choose what type of prize you are awarding. Here are your options:
 - a. Manual- choose your prize winner by typing the name in! Perhaps you are choosing the organization that had the first donor or last donor of the day, in situations like this, you find the organization on the dashboard and then type in the
 - b. Most Raised - select the prize based on what organization raised the most. You will be able to scope this by time.
 - c. Most Donors- select the prize based on what organization had the most unique donors (defined by unique email addresses). You will be able to scope this by time.
 - d. Random- choose your winner randomly! If you want to choose a random organization that received a donation during a certain time, this will be the option you want to choose. You will be able to scope this by time.
3. As you scroll further, you'll see Images, Sponsor Name, and Sponsor Link. These are optional fields.

4. Be sure to select “Save” before you navigate away from the Prize Editor page.
5. You may come back and edit the prize as necessary after saving.

Once your prize page is to your liking, simply check the ‘**Reveal Prize Page**’ checkbox at the top of the page. This will add a menu item to the navigation bar called Prizes for organizations and donors to see.

Highlighting prizes: In addition to having your prizes page appear in the drop-down, one can highlight specific prizes at the top of the Prize page and on the homepage. This allows for time specific prizes to be showcased so that donors are aware of them.

To highlight prizes, navigate to the “Prize” tab and select the checkbox under the “Highlight” column. This will automatically make those prizes appear at the top of the Prize page along with on the home page.



Prizes

The order in which prizes appear in this list will match the order they appear on the Giving Day site.

Prize Name	Sponsor	Winners	Highlight	Actions
^ Training Titan v		1	<input checked="" type="checkbox"/>	
^ First Donation v		1	<input checked="" type="checkbox"/>	
^ Early Riser Rush v		7	<input type="checkbox"/>	

To award a prize you will go back to this tab. Under your chosen prize will be a button that says "Add Winner". This will drop down the section to select a winner for that particular prize.

Prize Winners

Most Unique Donors: 0/1

Winner Text

Organization

Actions



Most Unique Donors: 0/1

Winner Text

Organization

Actions

Search for Winning Group

If awarding a manual prize, you can search for the winner up here

Individual Prize Description

When there are multiple winners, this text helps describe why this particular award was won. E.g. - First Prize, Silver Medal, #3. No need to put the group's name here.

e.g. Bronze Medal or 6am-12pm Winner

Suggestions will be based on: most_donors. **If awarding a Most Raised, Most Donors, or Random prize, you can use the prize suggester.**

Start/End times automatically take the Giving Day's configured timezone into account. For a 6am-7am prize, always enter 6am-7am.

Start Time **End Time**



Search for Winning Group

Individual Prize Description

When there are multiple winners, this text helps describe why this particular award was won. E.g. - First Prize, Silver Medal, #3. No need to put the group's name here.

Suggestions will be based on: most_raised.

Start/End times automatically take the Giving Day's configured timezone into account. For a 6am-7am prize, always enter 6am-7am.

Start Time **End Time**

Set your start and end time (if a time based prize). Then click "Suggest Winners"

You can see a list of winners below. Choose which one wins!

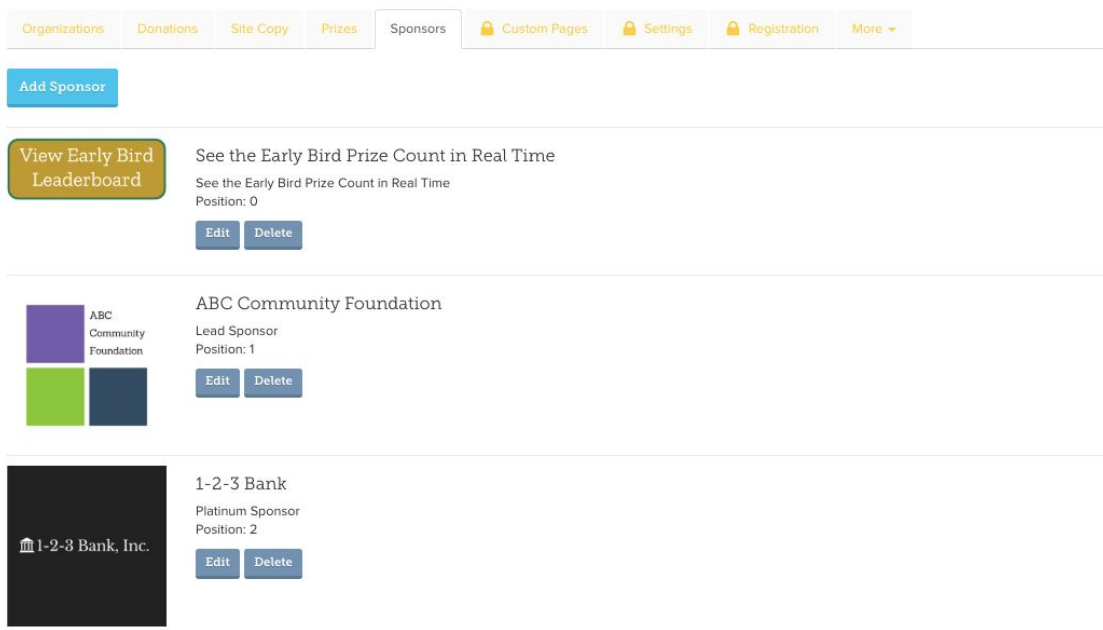
Rank	Name	Qualifying Value	Slug	
1	Snake Wranglers	\$43388.06	snake-wranglers	<input type="button" value="Select Winner"/>
2	few	\$4582.0	few	<input type="button" value="Select Winner"/>
3	Brutus Nonprofit	\$4554.0	brutus-nonprofit	<input type="button" value="Select Winner"/>
4	Challenge Space Center	\$4454.0	challenge-space-center	<input type="button" value="Select Winner"/>

- For prizes that are Most Donors, Most Raised, or Random, you will define the time period for the prize, and then select "Suggest Winners". This will pull all names that will qualify for the prize based on the configuration. If nobody qualifies for the prize, you will get a message that says, "No qualifying winners found."
- When a winner is suggested to you, please be sure they adhere to the prize rules and regulations. Since rules are different for all giving days, the platform does not have the ability to automatically do this.
- Once you save a winner, it will be displayed on the Prizes page on the Giving Day page.
- After you select a winner, you can go back and edit if need be.
- You will then go and add your offline donation to award the prize, if that is the process you are using for your Giving Day.

“Sponsors” Tab

This tab allows you to add sponsor images and URLs to the sponsor section of the landing page. You are also able to group each sponsor under custom headings and set the position of each sponsor under the designated headings.

When planning out your sponsors list, it is good to know that there is a max of three sponsor logos in a row due to mobile responsiveness. The formatting of this is not customizable, so it is good to know the limitations.



The screenshot shows the 'Sponsors' tab in a navigation menu. Below the menu is a blue 'Add Sponsor' button. The main content area displays three sponsor entries:

- View Early Bird Leaderboard**: A yellow button with the text 'View Early Bird Leaderboard'. To its right, the text reads 'See the Early Bird Prize Count in Real Time', 'See the Early Bird Prize Count in Real Time', and 'Position: 0'. Below this text are 'Edit' and 'Delete' buttons.
- ABC Community Foundation**: A logo consisting of three colored squares (purple, green, dark blue) to the left of the text 'ABC Community Foundation'. To the right, it says 'Lead Sponsor' and 'Position: 1'. Below this text are 'Edit' and 'Delete' buttons.
- 1-2-3 Bank**: A black square logo with the text '1-2-3 Bank, Inc.' to the left of the text '1-2-3 Bank'. To the right, it says 'Platinum Sponsor' and 'Position: 2'. Below this text are 'Edit' and 'Delete' buttons.

Click “Add Sponsor” button to open the field to add the sponsor information. ([Watch this video on how to add them to your #iGiveCatholic landing page!](#))



This image is a close-up of the 'Add Sponsor' button from the previous screenshot. The button is blue with white text. An orange arrow points from the right towards the button. The navigation menu is partially visible above the button.

Organizations Donations Site Copy Prizes Sponsors Custom Pages Settings Registration More

Sponsor Name

URL

Sponsor Level/Type
 Sponsor Types gather logos together under one header. Give a series of logos the same sponsor type to have them appear together under the same heading (ex. "Media Sponsor", "Network Leader", "Supported By").

Position
 Position affects the order of logos under a Sponsor Type, as well as the order of the Sponsor Types. Logos with lowest positions will be placed on the left. Sponsor Types that contain a logo with the lowest position will appear higher on the page. For best results, use a unique position for each sponsor logo.

Select Image Remove

Save Cancel

You can then add the Sponsor Name, URL to link to, the Sponsor Level Type, and the Position of the sponsor on the landing page. The lower the number, the closer to the top the sponsor will be. See the image below:

PAWNEE GIVES SEARCH... PRIZES LEADERBOARDS MENU

Sponsor Level Type → **Presented By**

Sponsor Logo & Linked URL ← **Sponsor Position 1**

Sponsor Level Type → **Sponsors**

Sponsor Position 2 **Sponsor Position 3** **Sponsor Position 4**

Media Partners

Back to Top

“Peer to Peer Fundraisers” - “More” tab drop-down

Peer-to-Peer Fundraisers

Name **Donors** **Goal** **Amount Raised** **Fundraising For**

Using the “More” tab you are able to see all peer to peer fundraisers signed up for your giving day and search them by name.

“Analytics” - “More” tab drop-down

Analytics

Overall Stats

	Online	Offline	Total	
Dollars Raised	\$145,940.20	\$95,100.00	\$241,040.20	73 participating organizations
Unique Donors	642	29	671	65.5% of fees were covered
Gifts	1246	122	1368	69.3% of gifts had fees covered

Start Date **End Date**

Please note: Data will be most accurate for date ranges spanning 30 days or fewer, and with an end date of at least 48 hours ago.

Also under the “More” tab, you can look through the analytics related to your giving day site.

You can scope the range of the dates these analytics are pulling from by adjusting the “Start Date” and “End Date.”

At the top you are able to see overall stats for dollars raised, donors, and gifts, as well as the number of participating organizations, the percentage of fees that were covered, and the percentage of gifts with fees covered.

Overview of reports:

Top Channels:

- Referrals: Site visitor clicked on a link from another website and was directed to your giving day site.

- Direct: Site visitor typed your giving day link directly into their browser's address bar.
- Organic Search: Site visitor used a search engine to search for your giving day.
- Social: Site visitor found a link to your giving day on social media.

Top Referral Sources: Ranks referral sources from most sessions to least. A referral source is a URL that a site visitor found your giving day's link on and clicked through to your giving day site. For example, if I saw your giving day link on Facebook and opened the link from Facebook, the referral source URL would be Facebook.

Social Network Sources: Ranks social network referrals from most sessions to least.

Sessions by City: Ranks the location of the sessions by city from most sessions to least.

Page Traffic: Ranks the most popular pages on your giving day site from most sessions to least.

Organizations Registered: Chart displays the number of organizations registered for your giving day over time.

Organizations Registered by Day: Graph displays your giving day's registration volume by day.

Organization Locations: A map that displays the location of all organizations registered for your giving day.

Note: *This map uses geocoding to populate the map, so you will only see the organization's name and its coordinates when you hover over each orange dot.*

Donor Locations: A map displaying the location of all donors who have given to an organization participating in your giving day.

Nonprofits Receiving Donations: A map displaying the locations of all participating organizations that have received a donation.