## Your complete guide



JustGiving

from Blackbaud

# WHAT'S IN THIS GUIDE?



## 1. Getting started and logging in

### 2. <u>Using reports like nobody else</u>

- The different reports available
- Using Custom Codes
- Using the quick search

#### 3. Getting the most out of fundraising tools

- Everything you need to know about Giving Checkout
- Adding events
- Viewing and promoting your event
- Everything you need to know about widgets

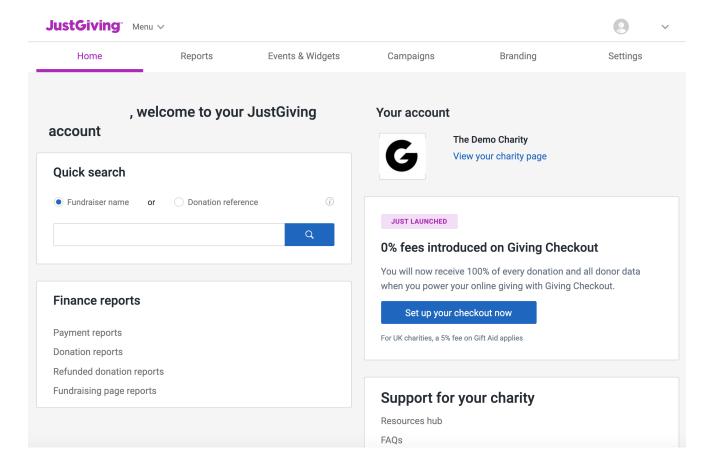
#### 4. <u>Launching your own Campaign Pages</u>

- Creating a Campaign Page

#### 5. Branding and settings

- Adding new users to your charity account
- Viewing invoices
- Updating your branding

## 1. Getting started and logging in



To log into your JustGiving account, go to <a href="www.justgiving.com/login">www.justgiving.com/login</a> (you might want to bookmark this, you'll be using it a lot!).

If you've forgotten your login details, you'll see the 'Forgot your password?' option. Once you're in, you'll be greeted with your charity's homepage.

From the homepage you can navigate to different areas of your charity account, use the fundraiser or donor quick search (more on this later) and visit our resource hub and FAQs. The <u>toolbar at the top</u> will be your navigation tool. Here's an overview <u>of what</u> you'll <u>find</u> there:

- Reports everything from your payment reports to Fundraising Page and donation reports.
- Fundraising from your Giving Checkout link and buttons to adding and promoting events
- Campaigns create new Campaign Pages and view and manage existing ones.
- Branding update your charity's JustGiving profile
- Settings add new users and change your password and personal email settings

## 2. Using reports like nobody else

If you are on our Grow Plan, you'll find four different reports in your JustGiving account:

Payment reports: details of any payments made to your charity's account by JustGiving from donation payments to Gift Aid payments. You'll receive a breakdown of the amounts we've paid you, relevant fees, donor details (unless they have chosen to remain anonymous) and the fundraiser's information (if the donation was made via a Fundraising Page).

**Donation reports:** from donations made directly to your charity to those made via a Fundraising Page, this report will have it. You'll be able to create reports for the specific time frame you want - from the last week to the last year. Included will be donor details (if they've opted in to hear from you) and the report will update daily at midnight.

**Fundraising Page reports:** get the low down on who's creating Fundraising Pages for you, just like donation reports, it will update daily at midnight and will include everything you might want to know.

**Donation refund reports:** details of any payments made to your charity account by JustGiving, but have since been refunded at the donor's request, over a certain period of time.

Whilst different in their content, the Fundraising Page report, donation refund report and donation report work the same way, so you can apply the same steps below to your refund and donation reports.



You can filter your Fundraising Page reports based on what type of page you're interested in. There are three different options for you to choose from:

Pages created: to identify new fundraisers

Pages expiring: Fundraising Pages that are about to close

Pages with an event date: to see all the pages created for a specific event

You can download a list of all the columns available in the Fundraising Page and donation reports and their definitions. You can find them here:

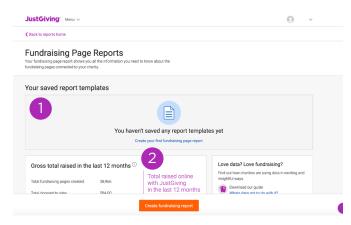
Download Fundraising Page report columns

Download donation report columns

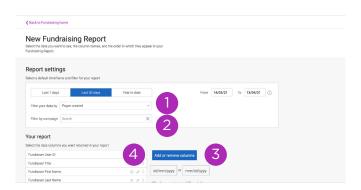
#### Here's how to use Fundraising Page reports:

Head to the reports tab and then click on Fundraising Page reports You'll be taken to a new page which will look like this:

1 Your saved report templates are unique to you. You will only see previous report templates you've saved with your specific login details. Having saved templates mean you can easily and efficiently access the information you need.



- 2 An up-to-date glance of the total raised in the last 12 months by your charity on JustGiving. It will include the number of pages created and the total Gift Aid amount received too.
- 1 Toggle between the different time frame parameters or choose a specific date range to suit you.
- Use the drop-down option to filter your report data by pages created or expiring or event date



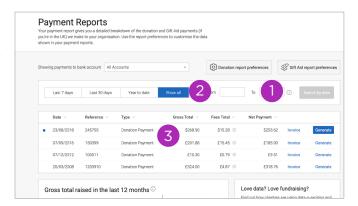
- A basic report will include lots of columns (we're serious, there's lots!) but if you don't need all this information, click on 'Add or remove columns.' A pop up will appear that will allow you to select and deselect columns.
- 4 Use the arrow icon to drag columns up and down (depending on the order you'd like to view them in), and the pencil to rename the report columns if you wish.

Once you're happy, click 'Save template', you'll then be prompted to fill in a name for the report and a brief description.

- Your saved templates will sit in the reports tab under saved report templates so you can download a report to your chosen specifications whenever you want.
- You can also edit your saved reports whenever you feel like it.
- Don't forget you can apply all the above instructions to donation reports as well.

Payment reports aren't completely different to Fundraising Page and donation reports but there are some differences you'll want to know about. If you click on the payment reports option, you'll be taken to a page like this:

- 1 Edit your report preferences from here, and as with the Fundraising Page reports, you'll be presented with a list of all the available columns to select or deselect.
- 2 Toggle between different date parameters to find the correct reports



3 Each payment report will have a breakdown available including the date of payment, type of report (donation of Gift Aid), the gross total, fees total and net payment

You can download a list of all the columns available in the Fundraising Page and donation reports and their definitions. You can find them here:

Download Fundraising Page report columns

<u>Download donation report columns</u>

#### Using custom codes

Custom Codes allow you to add your charity's own internal codes to JustGiving reports. There are two types of Custom Codes:

- Event
- Fundraising Page

To use them, first add headers for each type of Custom Code. You'll be able to add three headers per type. If someone in your organisation has beat you to it, you won't be able to edit them directly. To edit your existing Custom Codes, you'll need to drop us an email.

You can code all your events and Fundraising Pages on JustGiving. Just remember to press 'Save' when you're done!

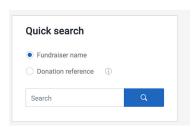


Our resident reporting experts have put together an on-demand webinar dedicated entirely to reporting.

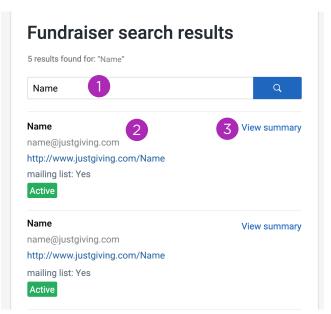
If you'd like to learn more, you can learn more by clicking here

#### Using the quick search

On the right-hand side of the reports tab and the homepage of your JustGiving account, you'll find our quick search for fundraisers and donors.



- Use the search bar to find a fundraiser or a donation by searching their name or donation reference (found in your reports).
- You'll see a brief summary of the fundraiser including their name, Fundraising Page web address (which will be hyperlinked) and their email address.
- Find out the status of the Fundraising Page to see whether it's active, cancelled or completed



If you click on 'View summary,' you'll receive a more detailed overview about the Fundraising Page including everything from their event to the page title, their target and amount raised to date.



Top tip: we have three different Fundraising Page statuses:

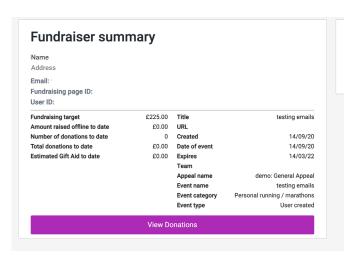
Active: the page is open and can receive donations

Complete: the page can still be viewed but it can no longer receive donations. Pages are typically set to this status three months after a fundraising event has ended.

Cancelled: the page has been has been closed and can no longer be viewed.

Unfortunately for this demo Fundraising Page, it's not received any donations!

However, if it had you could see a breakdown of all the donations made, and download a specific donation report for the Fundraising Page.



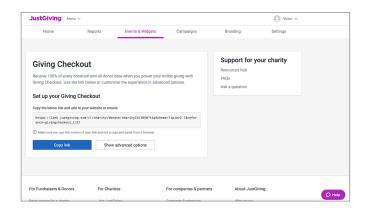




## 3. Getting the most out of Fundraising tools

#### **Giving Checkout**

Giving Checkout is a simple and free way to enable your supporters to donate online. There is 0% platform and processing fees, plus you get 100% of the donor data if you are on our Grow Plan. All you need to do is promote your dedicated link via your website and any other online channels you like.

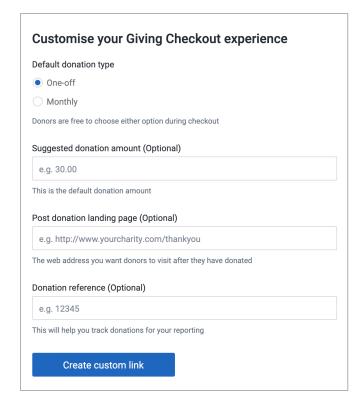


To find your Giving Checkout link, click on the Events and Widgets tab and then select Giving Checkout. You will then find your charity's Giving Checkout link which you can simply copy and paste to wherever you want to share it, such as your website, emails or social media.

On this page you'll also find advanced options that allows you to customise your Giving Checkout experience.

You can use these to:

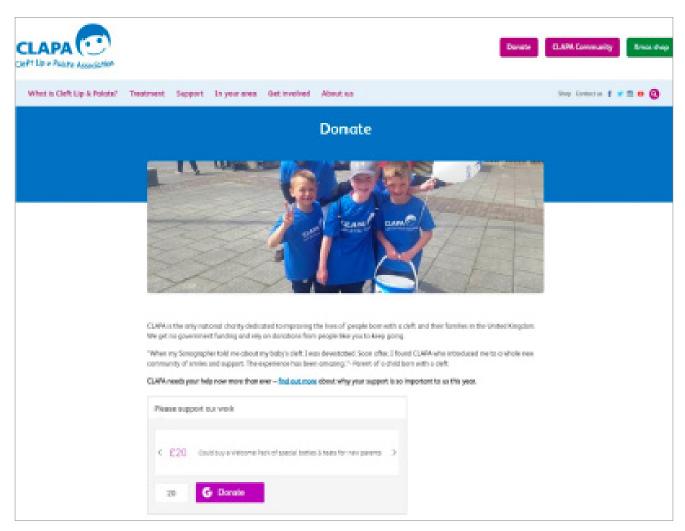
- Set default donation type to either a single or monthly donation
- Set a suggested amount
- Choose a post donation landing page
- Add a donation reference which will appear in your donation report
- Customise your JustGiving donation button for your website
- Generate your own QR code that will take donors straight to your Giving Checkout link so they can donate online securely to your cause



#### **Donation Boxes**

Donation boxes are a great way to convert visitors to your website into potential donors and long-term supporters. These JustGiving branded boxes promote a familiar way of giving and enable you to define donation amounts and descriptions. For example, "A £20 donation could buy a child's school books for a year." They're simple to set up and embed into your existing website:

- Go to the Fundraising tab and then underneath the 'Tools for your website' title, there'll be 'Donate box & donation prompts.'
- You'll be asked to fill out up to three different donation amounts and a corresponding example of what the donation could help your charity to achieve.
- Once that's done, choose 'Save changes.'
- Then head to the next step 'Add Donate Box to your website' and you'll be able to download the relevant code to place in your website's HTML. The result will look something like the below:

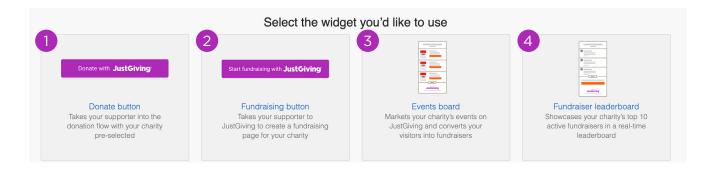


©2018 Cleft Lip & Palete Association. All rights reserved. (And thanks for letting us use it!)

#### Widgets

Fancy reaching more people and giving visitors to your website a quick and effortless way to donate to your charity or fundraise for you? If the answer's yes, widgets are for you and they're free and ready for you to use!

- To find widgets, go to the Events and Widgets tab in your account and you'll see an option for «widgets».
- Once you've clicked on this, just search for your charity name, select the widget you
  want (there are several options to choose from) and then copy the HTML code to
  your website.



- 1 Donate button when a supporter clicks on this they'll go straight into the donation flow for your charity on JustGiving, reducing the number of clicks it takes for them to donate always a win!
- 2 'Start fundraising with JustGiving' button the supporter will go straight into the page creation flow for your charity and be given a choice of events to select, or they can create their own personal challenge!
- 3 Events board advertise your charity's upcoming events and convert a visitor to your website into a fundraiser. Your upcoming events will be displayed with a 'Start fundraising' button for each specific event.
- 4 Fundraiser leaderboard create a sense of community and a little bit of healthy competition with a leaderboard widget. Your charity's top 10 active fundraisers will be displayed and will update in real-time to give fundraisers some extra encouragement.



Unsure about the specifics of getting widgets from JustGiving to your charity's website? We don't blame you! Luckily, we've got some detailed guides for you.

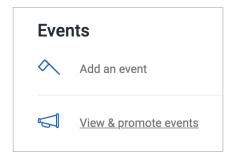
Here's one for embedding the code into HTML

One to embed the code into Wordpress

And finally, one for Drupal!

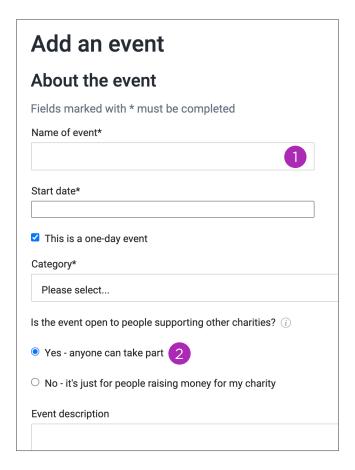
#### **Events Tool**

Adding events to your JustGiving account is a great way to ensure you're both accurately reporting and correctly promoting your events. It creates details fundraisers can choose when setting up their page to ensure they don't add incorrect information to it.



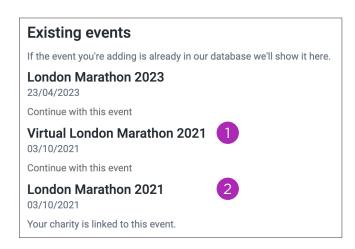
To add an event, make sure you've clicked on the Events and Widgets tab. Then, click on 'Add an event', you'll then be asked to fill in a few details.

- 1 The fields marked with an asterisk need to be filled in, including choosing an option from the drop-down for 'category.'
- If the event is open to people supporting any charity, we'll display it to everyone setting up a Fundraising Page. If not, we'll make sure only people creating a Fundraising Page for your charity can choose this event.
  - Once you're happy with the event details, click 'Continue.'
  - You'll be taken to a new page with a few more details to fill in.
  - You'll then need to sit tight and wait for your event to be approved, this shouldn't take too long, and we'll email you when it's live!



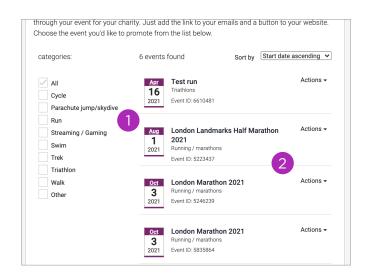
When you're submitting an event, you might see a pop-up like this >

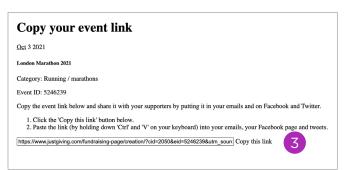
- 1 This means we've found an event in our database which matches the details you've entered. You'll need to click 'Continue with this event.'
- 2 Someone has beat you to it and they've already added this one to our events system.

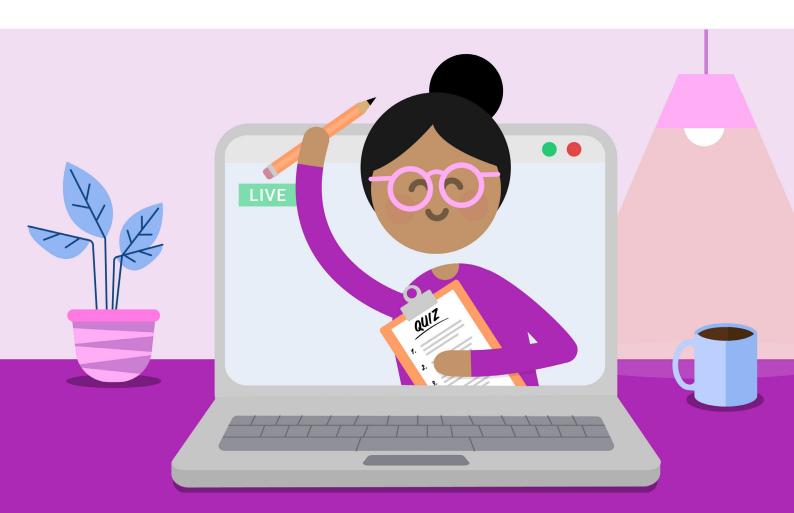


Next, head to 'View and promote events' in the Fundraising tab and you'll see a page that looks like this >

- 1 You might find it useful to filter your view by event type or sort using the other drop-down options in the top right-hand corner.
- 2 All your charity's events will be listed in the same way with the event name, date and event category displayed. Click on 'Promote this event' for more exciting things!
- 3 Copy your deeplink to share in any email comms or social media posts.

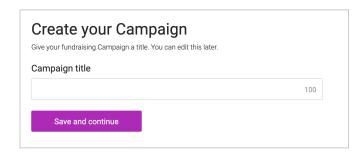




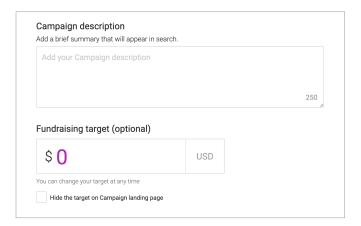


## 4. Launching your own Campaign Pages

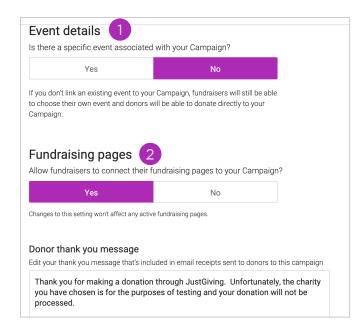
If you need to launch a new appeal or you've got a group of fundraisers that you want to create a sense of community around, Campaign Pages are a great place to start.



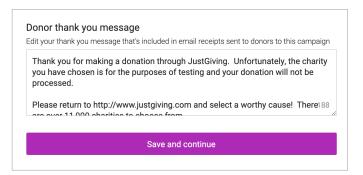
- Head to the Campaigns tab in your account and click on 'Create a campaign.'
- You'll be taken straight into the Campaign Page creation flow and first asked to pick your Campaign title.
- 1 You have 250 characters to work with but the shorter, the better, as this will appear in the search results.
- 2 Be as punchy or as modest with your target as you like. You don't have to have a target if you don't want one, however, we know that pages with a target raise more.



- Toggle between yes or no depending on whether you want your Campaign Page to be linked to a specific event or not.
- 2 Toggle between whether you want Fundraising Pages to be set up for your Campaign Page or not. If you choose no, the 'Start Fundraising' option will be removed from the page.



Create a thank you message just for your Campaign Page. The message will be prepopulated with your charity's generic thank you message but you can add a personal touch by creating a message just for donations to a specific Campaign Page.

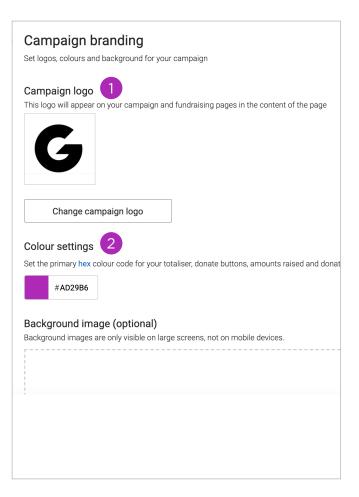


If you're using a Campaign Page as an event landing page, then linking an event to it is important!

Details of your event, including the name and date, will appear on the Campaign Page, creating a simple event landing page!

Want to know more? Find out here

- 1 Your Campaign Page, and Fundraising Pages linked to it, will feature your charity's default logo, you can update this here to a unique logo for the Campaign Page if you wish.
- 2 Add an extra bit of sparkle to your Campaign Page with a background colour or image. You'll be able to upload an existing image saved to your computer to add an extra touch of charity branding.





If you're in need of some inspiration for Campaign Page background images, take a look at the below.

<u>Leap Confronting Conflict - London Landmarks Half Marathon</u>
<u>Dublin Zoo - Emergeny Campaign</u>
<u>Launchpad Reading - Big Sleep Out at Home</u>

- 1 Your cover photo is going to take centre stage on your Campaign Page so make sure it's a good one. Charities choose everything from a picture of fundraisers to the individuals and causes that need your support.
- 2 You don't need us to tell you how important the story is on your Campaign Page but you might miss the tools you can use lined up along the bottom of the story box;

**Title** - say goodbye to one long chunk of text and instead add emphasis to the story where necessary.

**Quotes** - call out an important piece of information as a quote.

**Link** – if you've got more to say or want to simply draw attention to more information on your website, link directly to it from within your story.

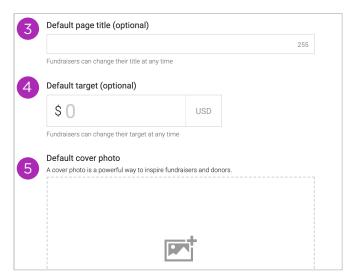
Images - add additional pictures.

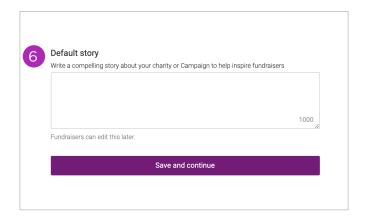
**Video** – videos are much more engaging than plain text and now you can embed a Youtube video into your story.

- 3 Get your fundraisers off to a flying start by setting some basic defaults for their page (they can edit these once their page is set up), starting with a page title.
- Pages with a target raise more and it's also key to set expectations if your fundraisers have a target they need to raise.
- 5 Don't rely on our stock photos and instead add a more personal touch with images from your charity's work or previous fundraisers.
- 6 You know the work your charity does better than anyone so help your fundraisers out by writing a compelling story to get them started.









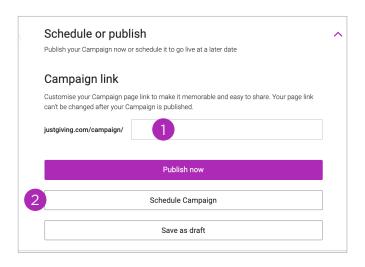


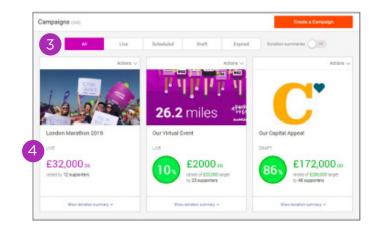
If you've chosen not to have a fundraising option for your Campaign Page, then you've saved yourself a job and can ignore this step!

- 1 When you're picking your Campaign Page web address keep it short so it's memorable and easy to share you can't change the web address once you've clicked save so make sure you're happy with it.
- 2 This is the final decision (we promise!). You've got three options here:
  - 1. Publish now it'll be live on the website and ready to donate to.
  - 2. Schedule Campaign it'll go live on your chosen date.
  - 3. Save as draft for your charity's eyes only, it can stay as a draft for as long as you like.

Your Campaign Page is finished, congratulations!

- 3 Navigate within your Campaigns tab between live, scheduled, draft, and expired Campaign Pages or view them all at once.
- 4 Each Campaign snapshot will give you a look at how the Campaign Page is performing and a few quick actions to take from editing the Campaign Page, updating the offline amount and deleting it.





If you return to the Campaigns tab, you'll find an option 'View existing campaigns' which will give you a dashboard of all your charity's past and present Campaign Pages.

## 5. Brand and Settings

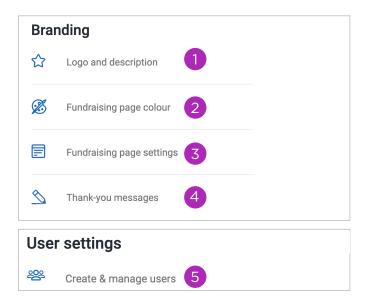
If you're still with us, congratulations for making it this far! Hopefully your brain isn't hurting too much, we'll keep the last section short.

The Branding & Settings tabs feature everything from updating your charity's JustGiving profile to changing your personal login details.

1 Update your charity's logo as a jpeg, jpg, gif, bmp or png file, it'll appear on your charity's JustGiving profile page, any Campaign Pages you create and your supporters' Fundraising Pages.

Use 80 characters to fill out your charity's impact statement which will be displayed on your charity's profile.

Fill out your charity's description (this time with 300 characters) which will appear under your charity's impact statement on your profile and on Fundraising Pages.



- 2 Pre-set features on Fundraising Pages like the totaliser and donate button to your charity's custom colours.
- 3 Create default settings for anyone who creates a page for your charity with a cover photo and a page story. (These will be overriden for Fundraising Pages linked to a specific Campaign Page that you've created default settings for too).
- 4 Use 500 characters to send a personalised thank you to everyone who donates to your charity.
- 5 Manage who has access to your charity account by inviting new users, removing users, reviewing any pending invitations to join the account and updating who has access to what within the account.



Need some inspiration for how to encourage your charity's mission statement in 80 characters? Here are two of our favourites:

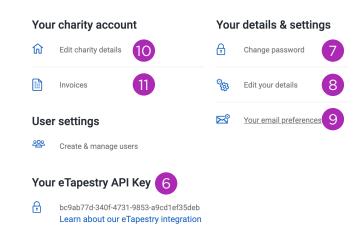
**Spinal Research** - We fund life-changing research to change the future of spinal chord injury.

**TRIBE Freedom Foundation** – We push the limists of human edurance to fight modern slavery.



You can have as many users with access to your charity account as you like. There are two types of users:

- 1. Admin this user can access everything within the charity account.
- 2. Basic this user can only access certain areas of the account as decided by the individual who invites them to join it.
- JustGiving has an automated integration with Blackbaud eTapestry®. Use this API key to set up your automated data sync.
- 7 It does what it says on the tin! Keep your account secure and update your password at regular opportunities.
- 8 Update your email address and job title.
- Decide what and how frequently you want to hear from JustGiving, from updates when a new piece is written on our blog to notifications when a supporter sets up a Fundraising Page for you.



- 10 Make sure the postal address and contact number we have for your charity are correct and that the contact details which will appear on your JustGiving profile are accurate.
- 11) View and download your charity's JustGiving invoices as a PDF.

Congratulations on making it to the finish line! Whether you've read cover to cover or skim-read one section (we won't tell, promise), we hope you've found it useful! There's plenty more resources available;

Our resources area includes tips and tricks on everything from social media skills to using deeplinks (<a href="https://www.justgiving.com/for-charities/resources">www.justgiving.com/for-charities/resources</a>).

Our webinar hub provides you with expert advice from getting to know your account to best practice to organising your own virtual event (<u>pages.justgiving.com/webinars</u>).

Subscribe to our blog with regular guest writers and inspiring case studies (blog.justgiving.com).

Got a question you need answering? Visit our FAQs (justgiving-charity-support.zendesk.com).