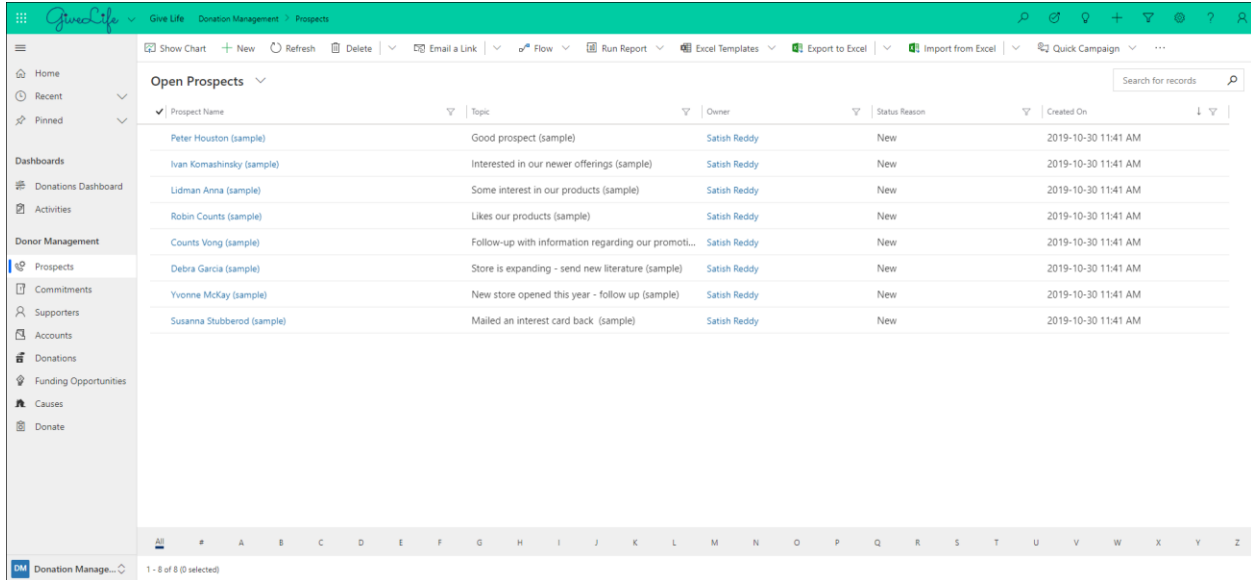


User Guide

Donor Management

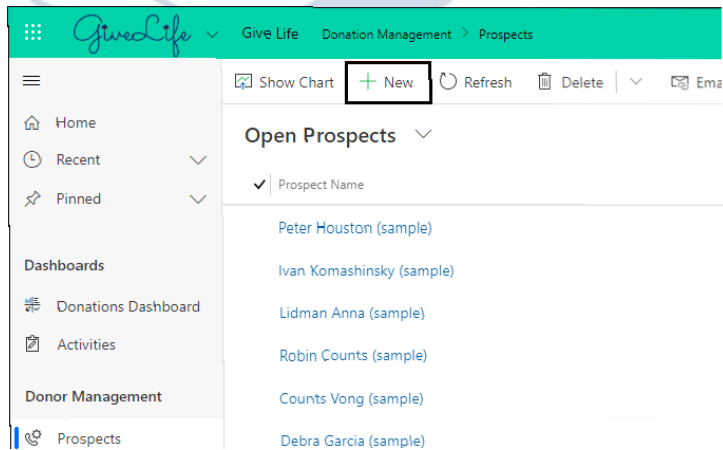
1. Creating the prospect -> Commitment Life cycle.

Click on the “Prospect” in left hand navigation pane.



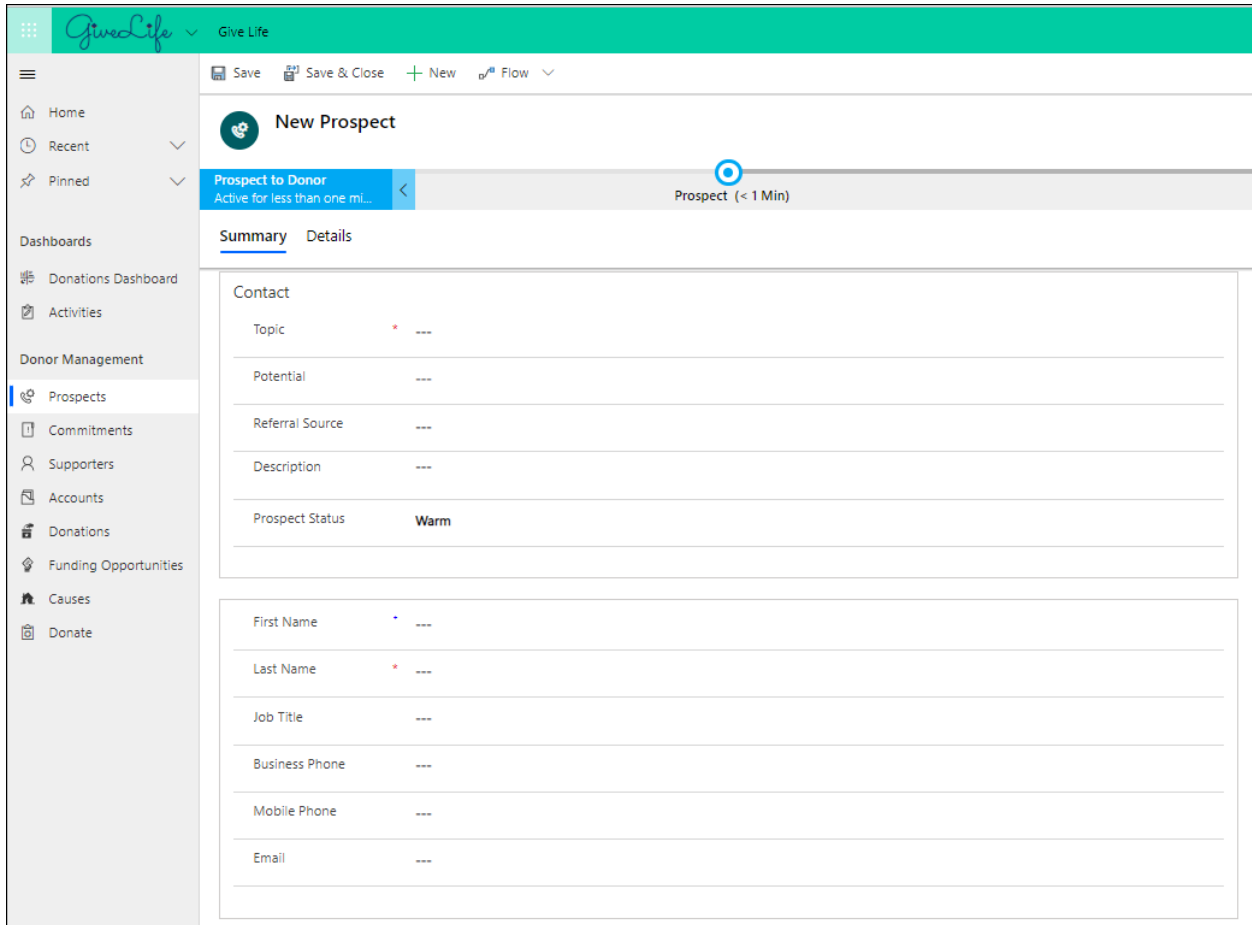
Prospect Name	Topic	Owner	Status Reason	Created On
Peter Houston (sample)	Good prospect (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Ivan Komashinsky (sample)	Interested in our newer offerings (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Lidman Anna (sample)	Some interest in our products (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Robin Counts (sample)	Likes our products (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Counts Vong (sample)	Follow-up with information regarding our promoti...	Satish Reddy	New	2019-10-30 11:41 AM
Debra Garcia (sample)	Store is expanding - send new literature (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Yvonne McKay (sample)	New store opened this year - follow up (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Susanna Stubberod (sample)	Mailed an interest card back (sample)	Satish Reddy	New	2019-10-30 11:41 AM

Click +New Click +New button located on the ribbon above prospects view, it will open a new prospect creation form.

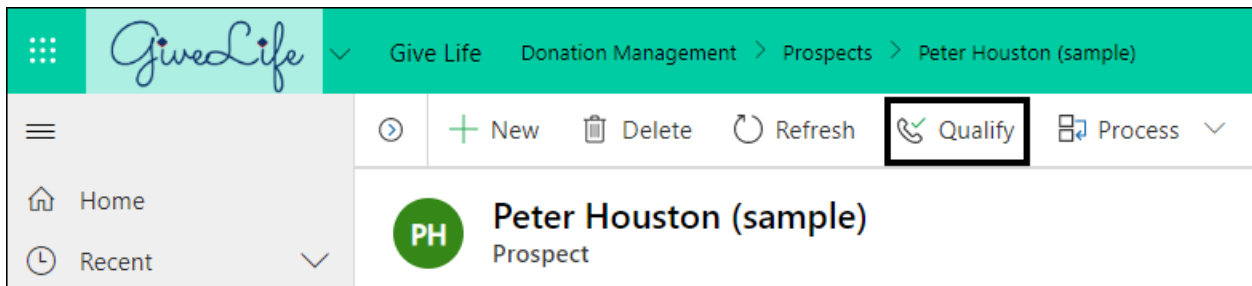


Prospect Name
Peter Houston (sample)
Ivan Komashinsky (sample)
Lidman Anna (sample)
Robin Counts (sample)
Counts Vong (sample)
Debra Garcia (sample)

Enter the required details in prospect form and click save button.



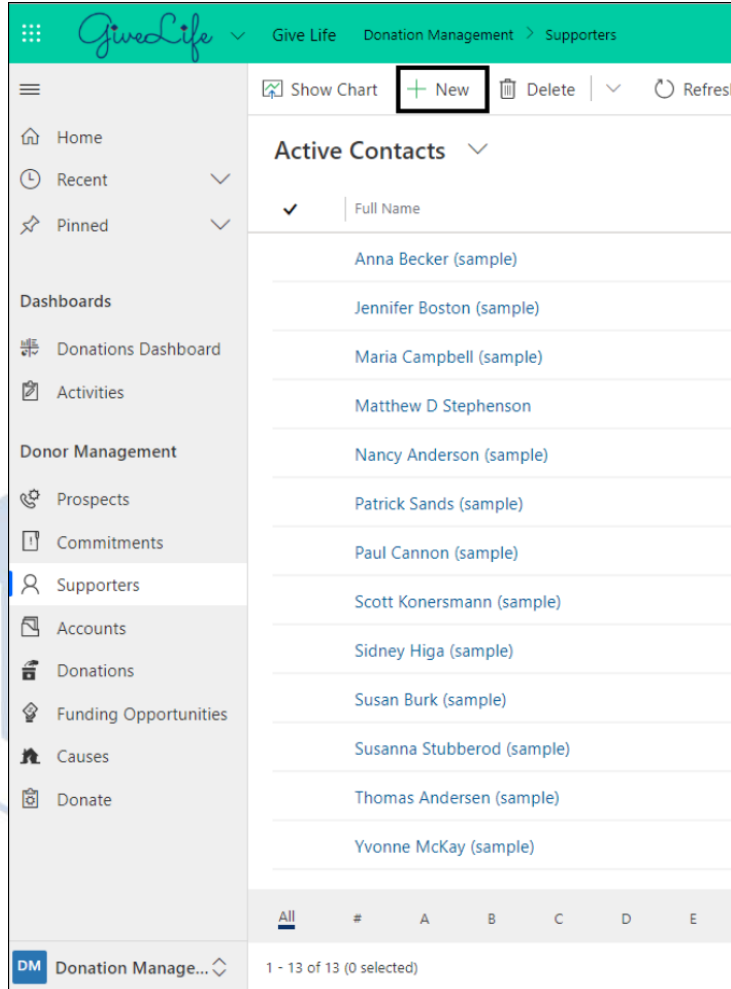
Once the prospect is created you can qualify it to convert it into a commitment by clicking Qualify button in the ribbon above the Prospect form.



Once qualified a commitment record shall be created in the system.

2. Creating a Supporter Record:

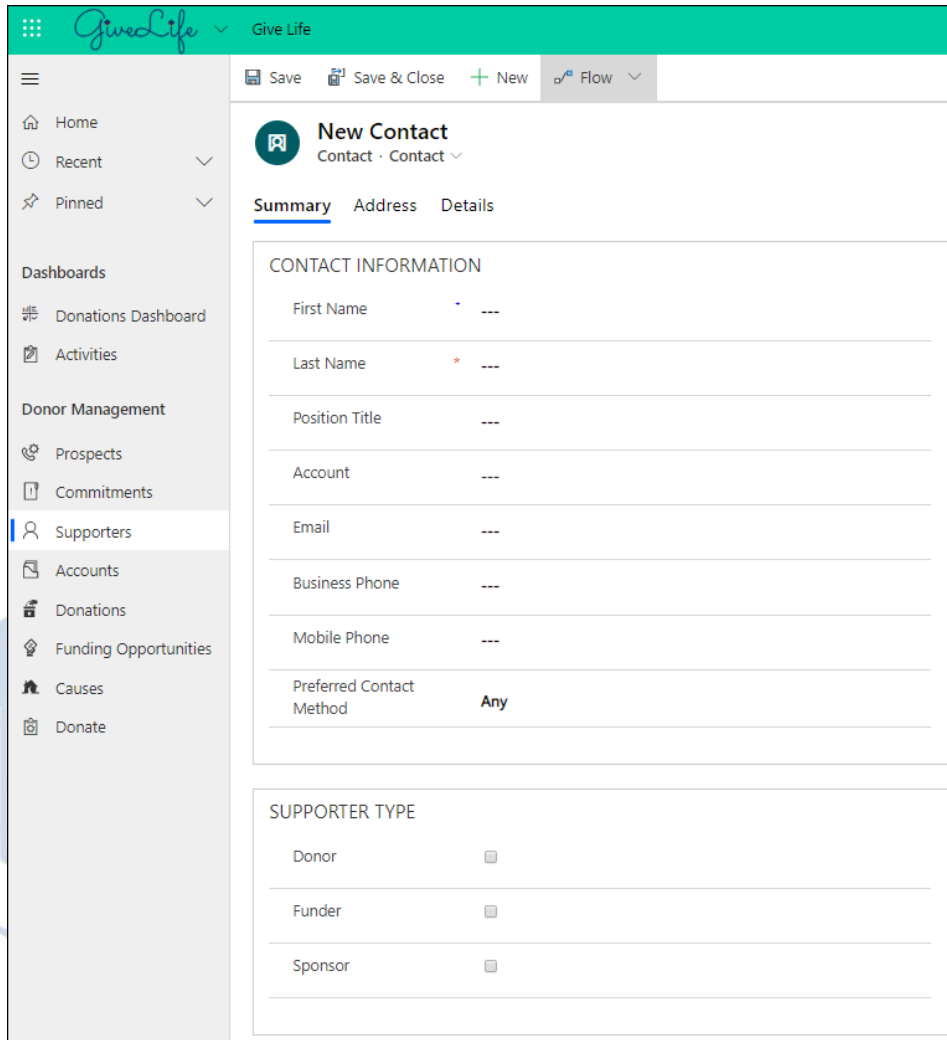
Click on the Supporter from Left hand navigation pane



The screenshot shows the GiveLife application interface. The top navigation bar includes 'Give Life', 'Donation Management', and 'Supporters'. The left-hand navigation pane lists various sections: Home, Recent, Pinned, Dashboards, Donations Dashboard, Activities, Donor Management, Prospects, Commitments, **Supporters** (highlighted), Accounts, Donations, Funding Opportunities, Causes, and Donate. The main content area is titled 'Active Contacts' and displays a list of 13 sample contacts. Above this list, a ribbon contains buttons for 'Show Chart', '+ New' (highlighted with a red box), 'Delete', and 'Refresh'. At the bottom, there is a filter bar with 'All' selected and a status indicator showing '1 - 13 of 13 (0 selected)'.

✓	Full Name
	Anna Becker (sample)
	Jennifer Boston (sample)
	Maria Campbell (sample)
	Matthew D Stephenson
	Nancy Anderson (sample)
	Patrick Sands (sample)
	Paul Cannon (sample)
	Scott Konersmann (sample)
	Sidney Higa (sample)
	Susan Burk (sample)
	Susanna Stubberod (sample)
	Thomas Andersen (sample)
	Yvonne McKay (sample)

Click +New button located on the ribbon above contacts view, it will open a new contact creation form.



New Contact
Contact · Contact

Summary Address Details

CONTACT INFORMATION

First Name * ---

Last Name * ---

Position Title ---

Account ---

Email ---

Business Phone ---

Mobile Phone ---

Preferred Contact Method **Any**

SUPPORTER TYPE

Donor ☐

Funder ☐

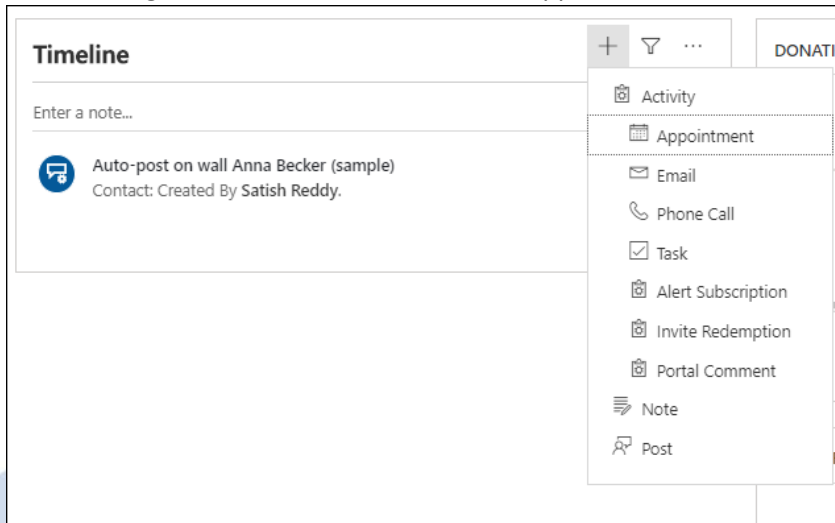
Sponsor ☐

Enter the required details and specify the supporter type by checking appropriate checkbox checked and click on save.

You can also add activities for a donor record and add attachments if any.

a. Add activities:

Click on + sign on the timeline section of a Supporter record



Timeline

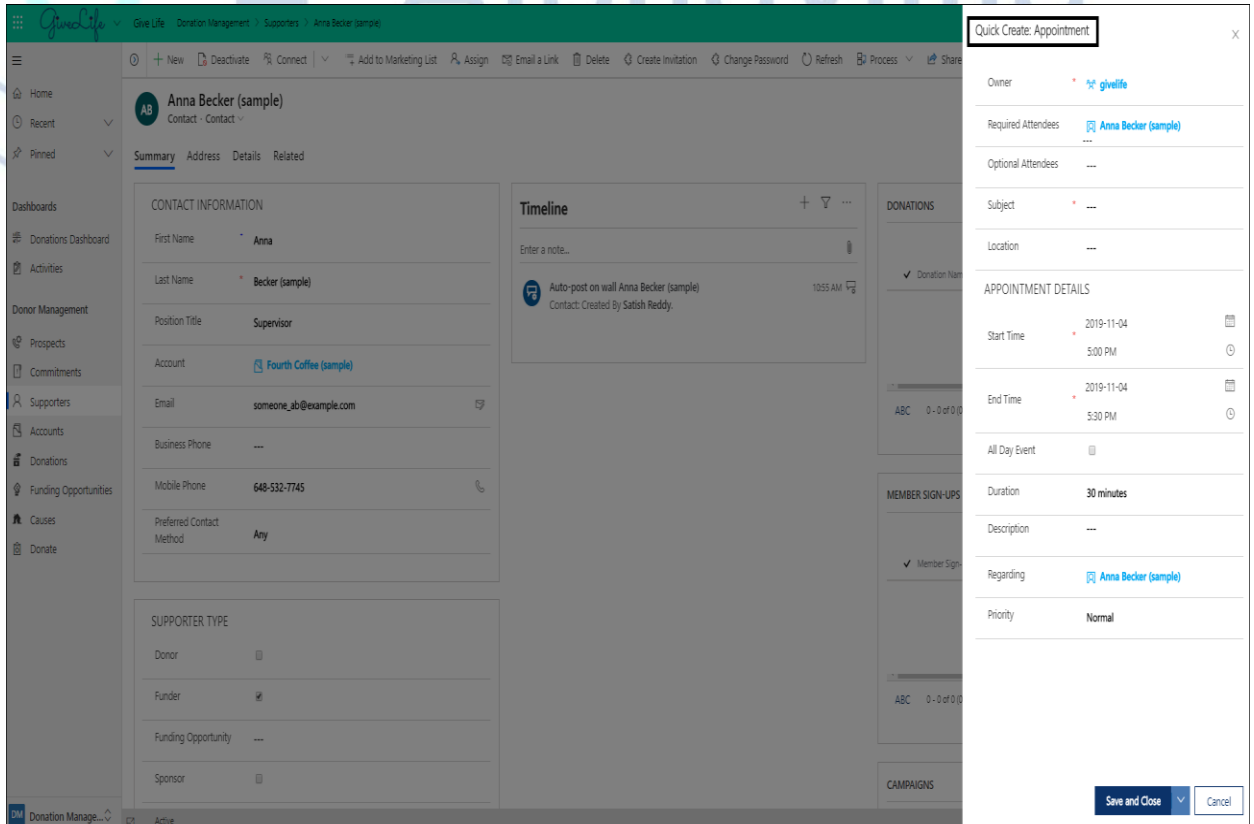
Enter a note...

Auto-post on wall Anna Becker (sample)
Contact: Created By Satish Reddy.

- Activity
- Appointment
- Email
- Phone Call
- Task
- Alert Subscription
- Invite Redemption
- Portal Comment
- Note
- Post

Select the activity that you want to add from the list of Appointment, Email, Phone call etc.

A quick create form for the activity details will open.



Quick Create: Appointment

Owner: * givelif

Required Attendees: [x] Anna Becker (sample)

Optional Attendees: ---

Subject: * ---

Location: ---

APPOINTMENT DETAILS

Start Time: 2019-11-04 5:00 PM

End Time: 2019-11-04 5:30 PM

All Day Event: ☐

Duration: 30 minutes

Description: ---

Regarding: [x] Anna Becker (sample)

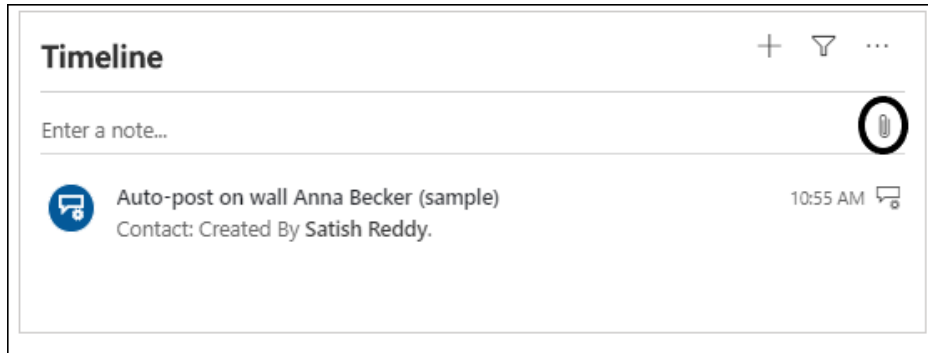
Priority: Normal

Save and Close Cancel

Enter the required details and click “Save and Close”

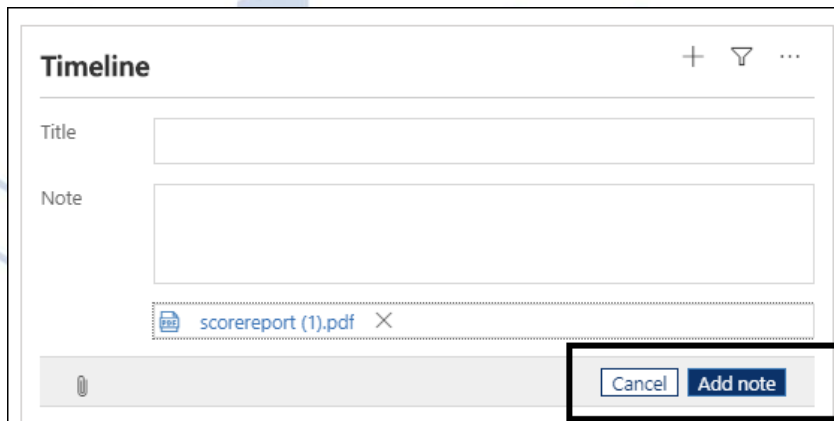
b. Add Attachment

Click on attach sign in the Timeline Section of donor Record



Select the file you wish to upload from your local directory

Click open button in the dialogue box and click “Add Note” button to attach the selected file.



3. Associate the Supporter to an account

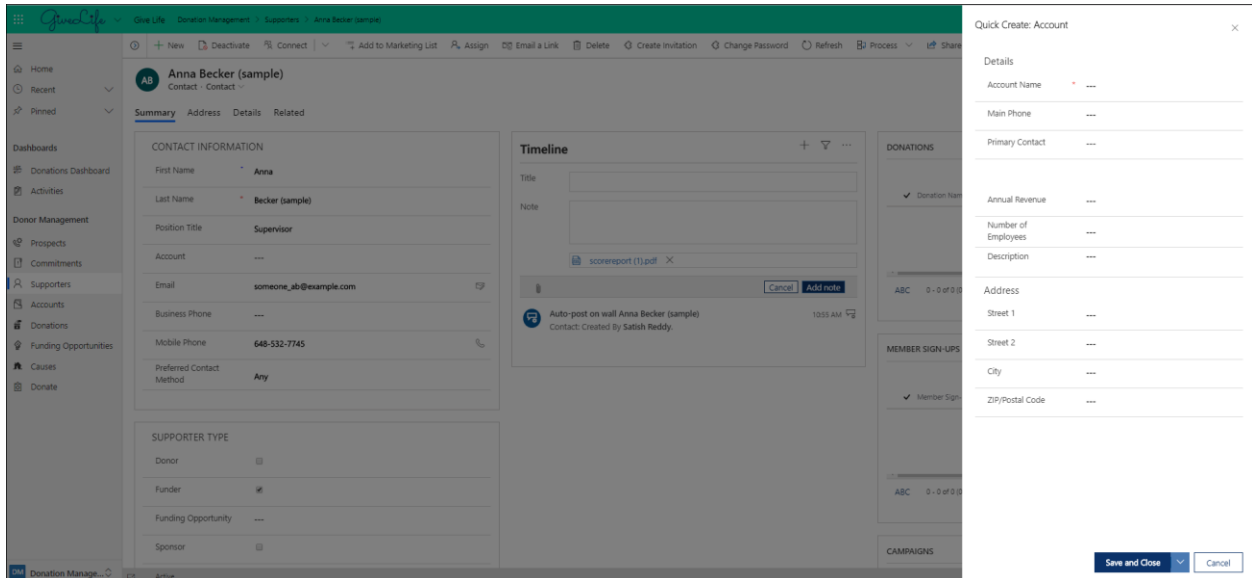
Click on the desired Supporter from Supporter view

Type the account name on the account field, it will populate the list of accounts by the name searched.

Select the desired account.

Click on the account name field, click on +New Record

A new account quick create form shall open



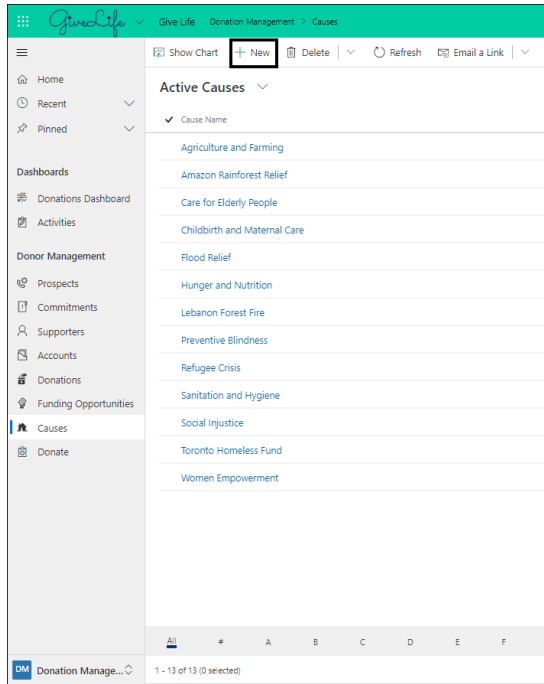
The screenshot displays the GiveLife web application interface. On the left is a navigation pane with options like Home, Recent, Pinned, Dashboards, Donations Dashboard, Activities, Donor Management, Prospects, Commitments, Supporters, Accounts, Donations, Funding Opportunities, Causes, and Donate. The main area shows a contact profile for 'Anna Becker (sample)' with tabs for Summary, Address, Details, and Related. The 'Summary' tab is active, showing contact information (First Name: Anna, Last Name: Becker (sample), Position Title: Supervisor, Email: someone_ab@example.com, Mobile Phone: 648-532-7745) and supporter type (Donor, Funder, Funding Opportunity, Sponsor). A 'Timeline' section shows an auto-post on the wall. A 'Quick Create: Account' modal form is open on the right, containing fields for Account Name, Main Phone, Primary Contact, Annual Revenue, Number of Employees, Description, Address (Street 1, Street 2, City, ZIP/Postal Code), and buttons for 'Save and Close' and 'Cancel'.

Enter the required details and click “Save and Close”. The contact shall get associated with the newly created account.

4. Creating the Cause records

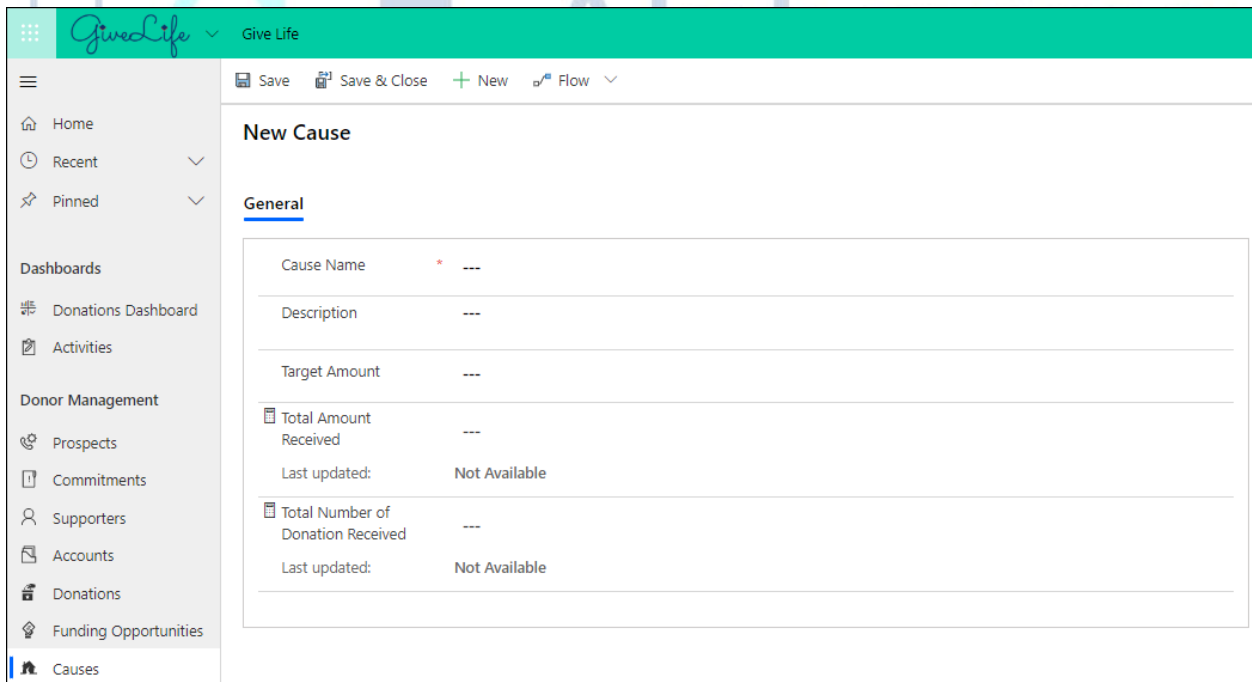
Causes are the records for which the Non Profit organization is accepting the donations.

Click on Funds in left hand Navigation Pane.



Click on +New Button on the ribbon above Funds View page.

A new Fund creation form will open on the screen.



The screenshot shows the 'New Cause' form in the 'GiveLife' web application. The form is titled 'New Cause' and has a 'General' tab selected. The form fields are as follows:

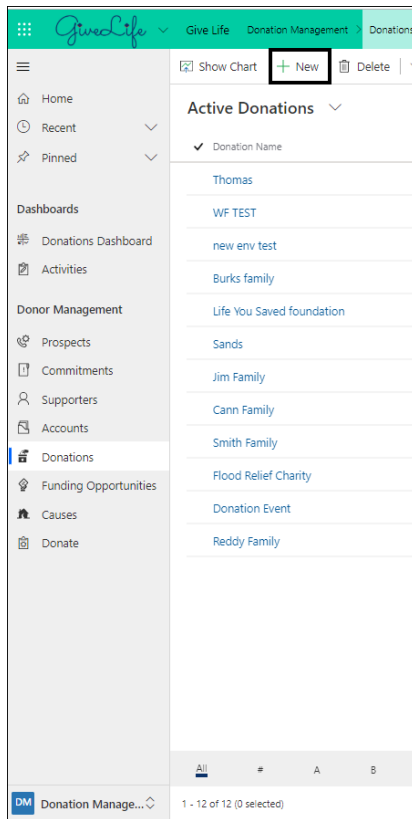
General	
Cause Name *	---
Description	---
Target Amount	---
Total Amount Received	---
Last updated:	Not Available
Total Number of Donation Received	---
Last updated:	Not Available

The form also includes a 'Save' button and a 'Save & Close' button in the top ribbon.

Enter the required details and click on “Save”.

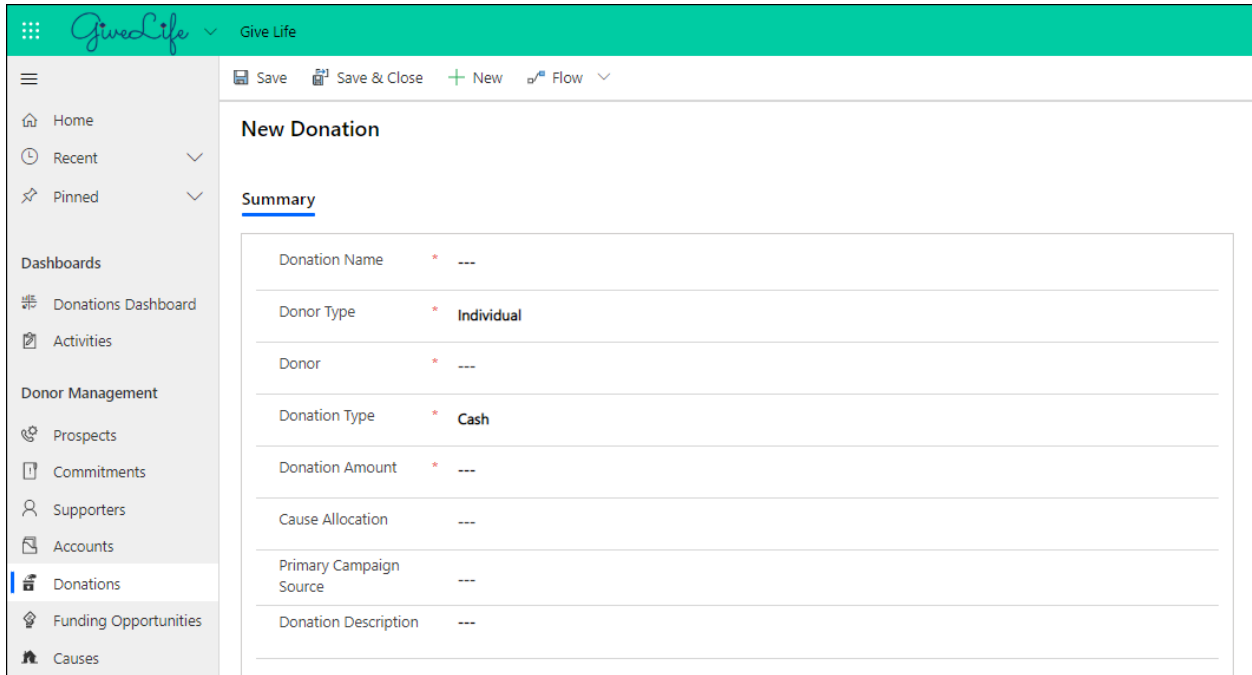
5. Creating the Donation record

You can create the donation record by clicking on “Donations” in left hand navigation pane.



Click on +New Button on the ribbon above Donations View page.

A new donation creation form will open on the screen



Enter the required details. You can also select the donor for this donation record by choosing the donor type.


If donor type is individual system allows you to select a contact for donor.



If the donor type selected is corporate the system allows you to select the corresponding account.



You can also define the Donation type i.e. Cash or In-Kind using the donation type field.



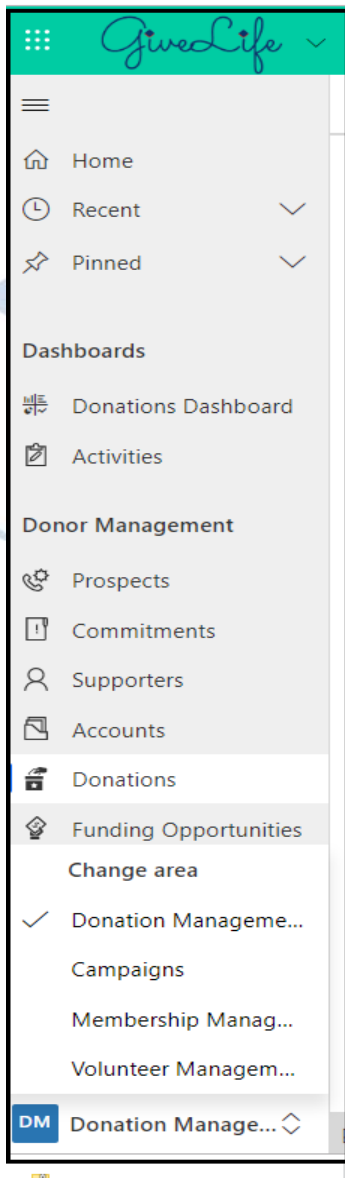
Click “Save” to save the record.

Volunteer Management

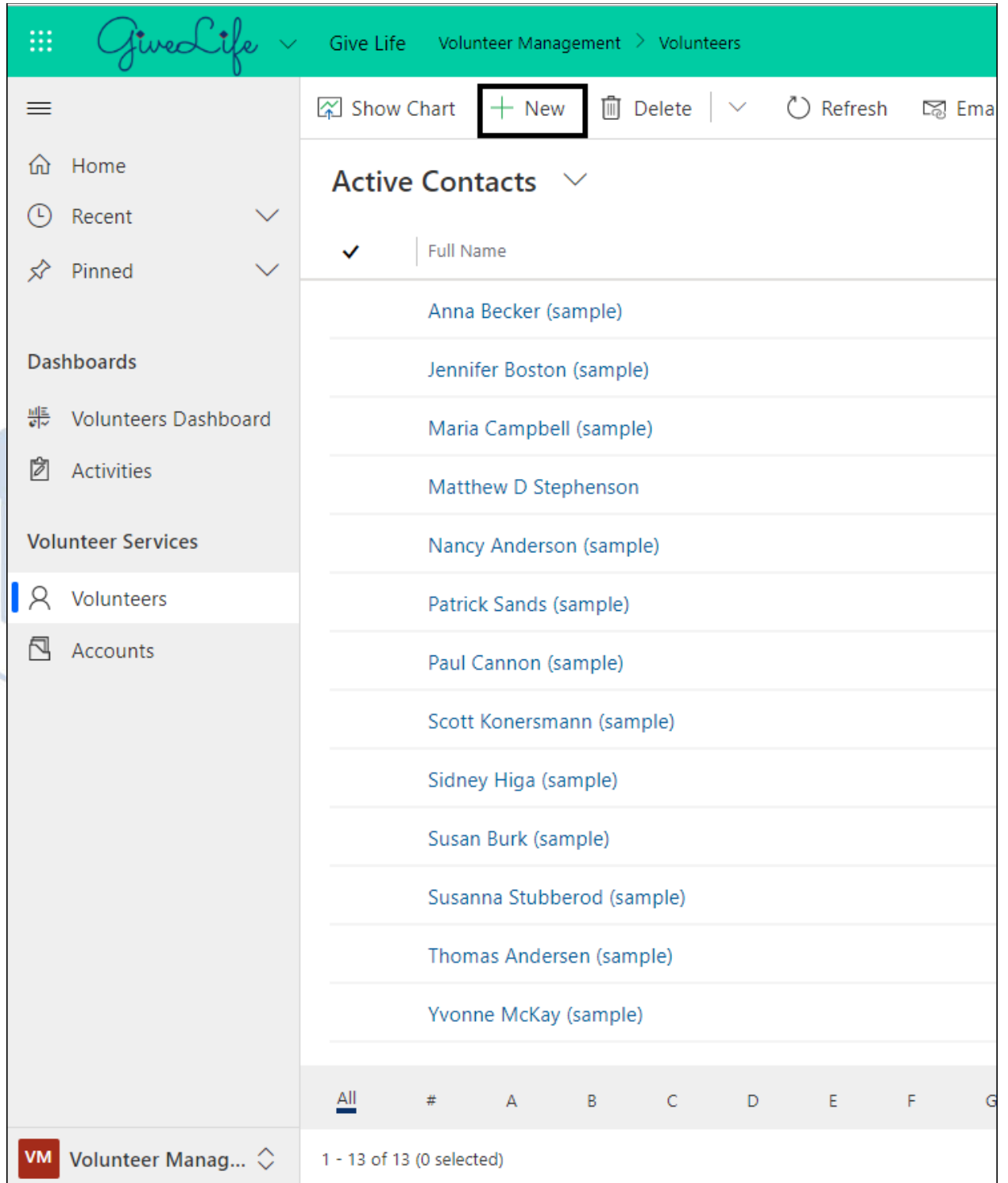
You shall be able to create the Volunteers and assign the organization to them using the volunteer management.

6. Creating a new Volunteer Record:

Go to the volunteer section by clicking on Volunteer management from the sitemap dropdown located at bottom left corner of the screen.

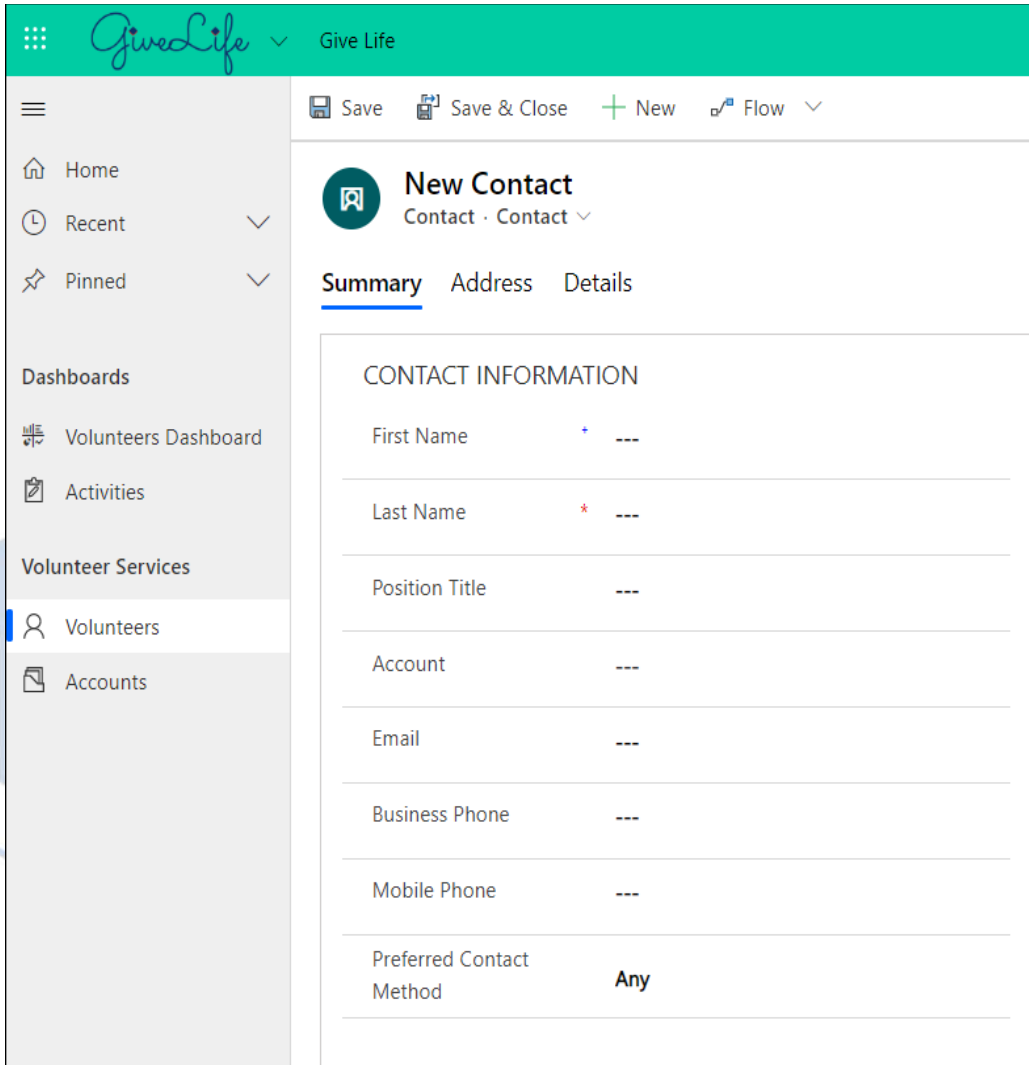


Click on the Volunteer from Left hand navigation pane.



The screenshot shows the GiveLife Volunteer Management interface. The left navigation pane has a sidebar with the following items: Home, Recent, Pinned, Dashboards, Volunteers Dashboard, Activities, Volunteer Services, **Volunteers** (selected), and Accounts. The main content area has a teal header with the GiveLife logo and navigation links: Give Life, Volunteer Management, and Volunteers. Below the header, there's a toolbar with 'Show Chart', '+ New' (highlighted with a black box), 'Delete', 'Refresh', and 'Email'. The main content area displays a list of 'Active Contacts' with a dropdown arrow. The list contains 13 entries, each with a checkmark icon and a full name. The names are: Anna Becker (sample), Jennifer Boston (sample), Maria Campbell (sample), Matthew D Stephenson, Nancy Anderson (sample), Patrick Sands (sample), Paul Cannon (sample), Scott Konersmann (sample), Sidney Higa (sample), Susan Burk (sample), Susanna Stubberod (sample), Thomas Andersen (sample), and Yvonne McKay (sample). At the bottom, there's a table header with columns: All, #, A, B, C, D, E, F, G. The bottom status bar shows '1 - 13 of 13 (0 selected)'.

Click +New button located on the ribbon above Volunteer view, it will open a new Volunteer creation form.



The screenshot shows the 'New Contact' form in the GiveLife application. The form is titled 'New Contact' and has tabs for 'Summary', 'Address', and 'Details'. The 'Summary' tab is active, showing a 'CONTACT INFORMATION' section with the following fields:

- First Name: ---
- Last Name: ---
- Position Title: ---
- Account: ---
- Email: ---
- Business Phone: ---
- Mobile Phone: ---
- Preferred Contact Method: Any

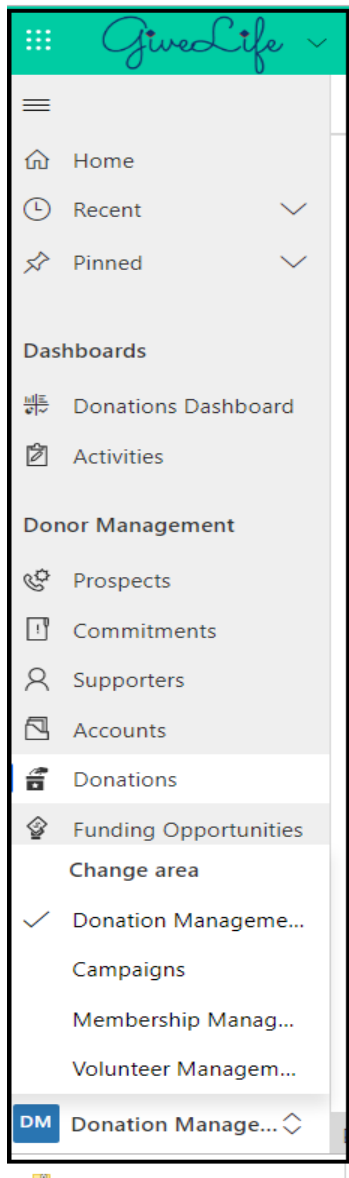
The left sidebar shows navigation options: Home, Recent, Pinned, Dashboards, Volunteers Dashboard, Activities, Volunteer Services, Volunteers, and Accounts. The top ribbon has buttons for Save, Save & Close, New, and Flow.

Enter the required details Checkbox checked. and click on save.

Membership Management:

You can create the customized membership plans and subscribe your donors to these plans using the membership Signup.

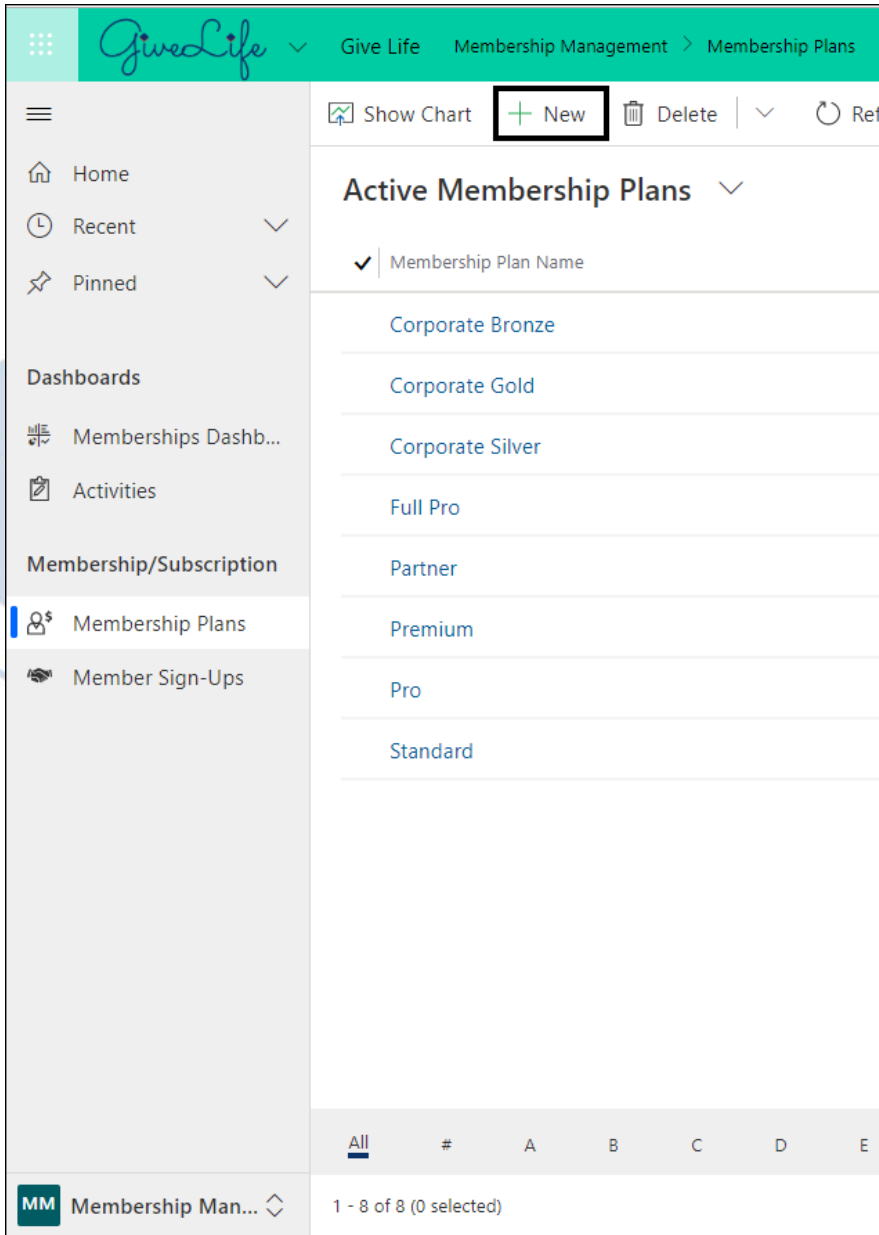
Go to the Membership section by clicking on Membership Management from the sitemap Dropdown located at the bottom left corner of the screen.



You can create Membership Plans and Subscribe your donors to specific membership plans using Member Signup.

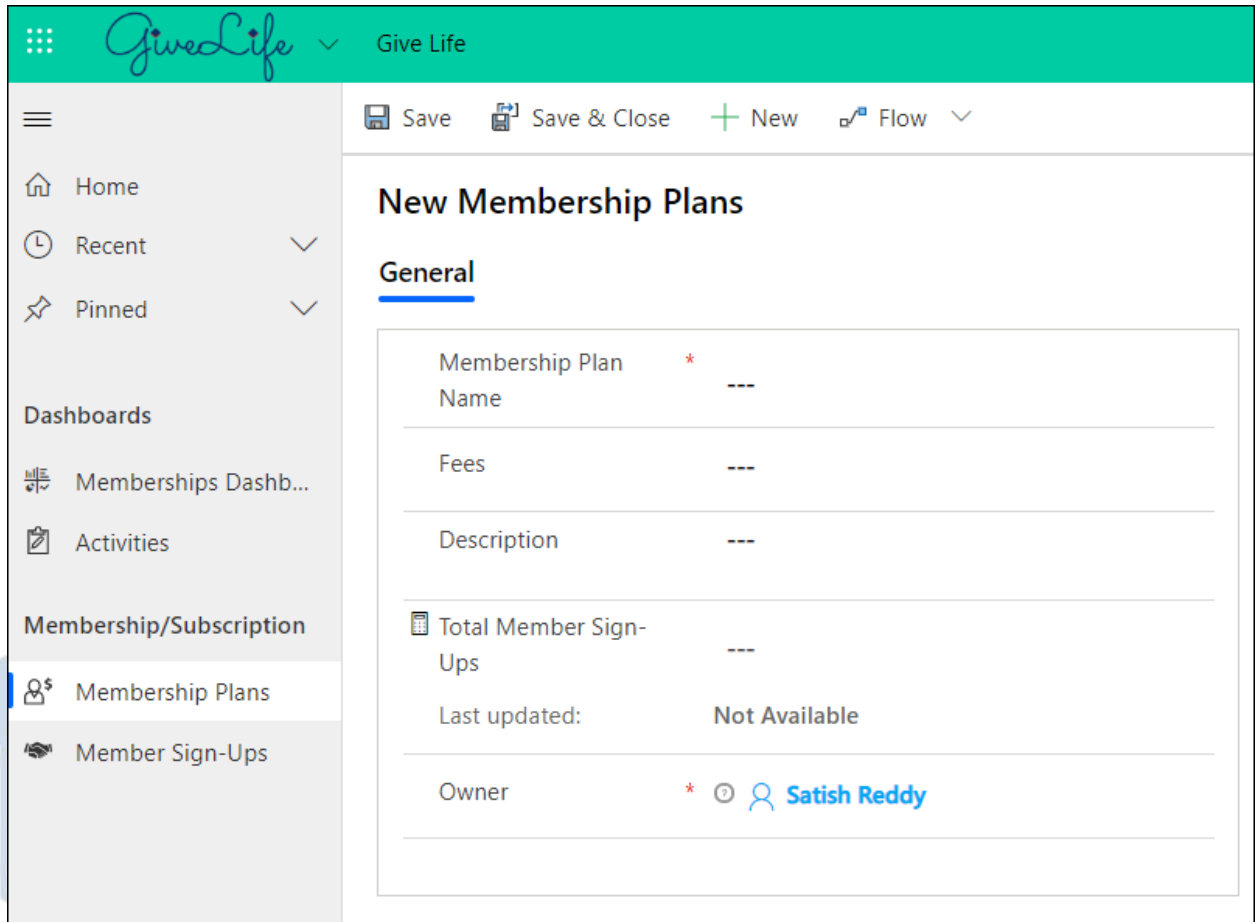
7. Create Membership Plans:

Click on Membership Plans from left hand navigation pane



The screenshot displays the GiveLife web application interface for managing membership plans. The top navigation bar includes the GiveLife logo, a dropdown menu, and the breadcrumb path: Give Life > Membership Management > Membership Plans. The left-hand navigation pane contains a menu with options: Home, Recent, Pinned, Dashboards, Memberships Dashb..., Activities, Membership/Subscription, Membership Plans (highlighted with a blue bar), and Member Sign-Ups. The main content area is titled 'Active Membership Plans' and features a table with a single column 'Membership Plan Name'. The table lists eight plans: Corporate Bronze, Corporate Gold, Corporate Silver, Full Pro, Partner, Premium, Pro, and Standard. Above the table, there are action buttons: 'Show Chart', '+ New' (highlighted with a black box), 'Delete', and a refresh icon. At the bottom of the interface, a status bar shows '1 - 8 of 8 (0 selected)'.

Click +New button located on the ribbon above Membership Plans view, it will open a new Membership Plan creation form.




Give Life

Save Save & Close New Flow

New Membership Plans

General

Membership Plan Name	*	---
Fees		---
Description		---
Total Member Sign-Ups		---
Last updated:		Not Available
Owner	*	 Satish Reddy

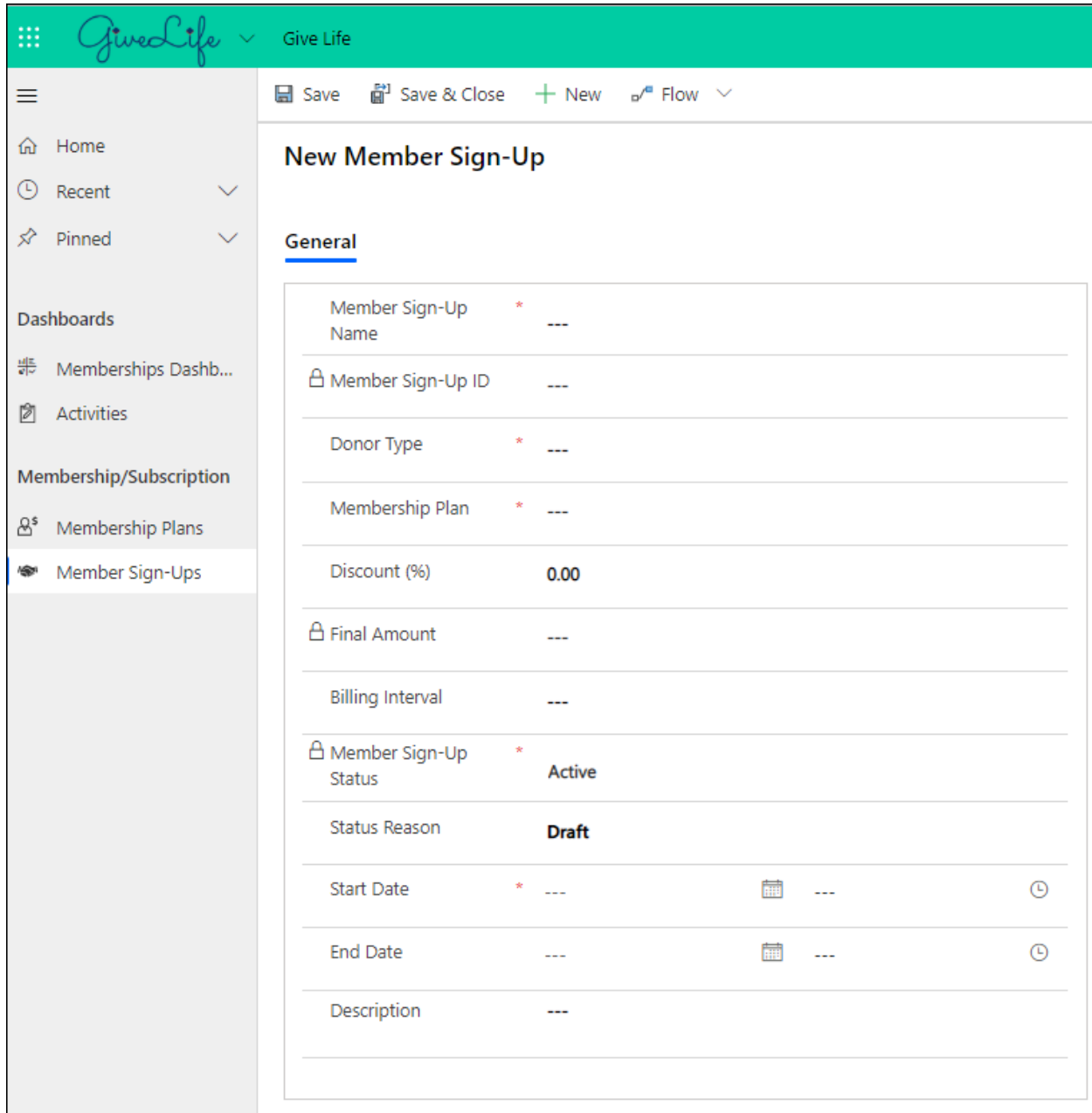
Enter required details and click on Save.

8. Create Member Signup:

Click on the Member Signup from Left hand navigation pane

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Click +New button located on the ribbon above Subscription view, it will open a new subscription creation form.







GiveLife Give Life

Save Save & Close + New Flow

New Member Sign-Up

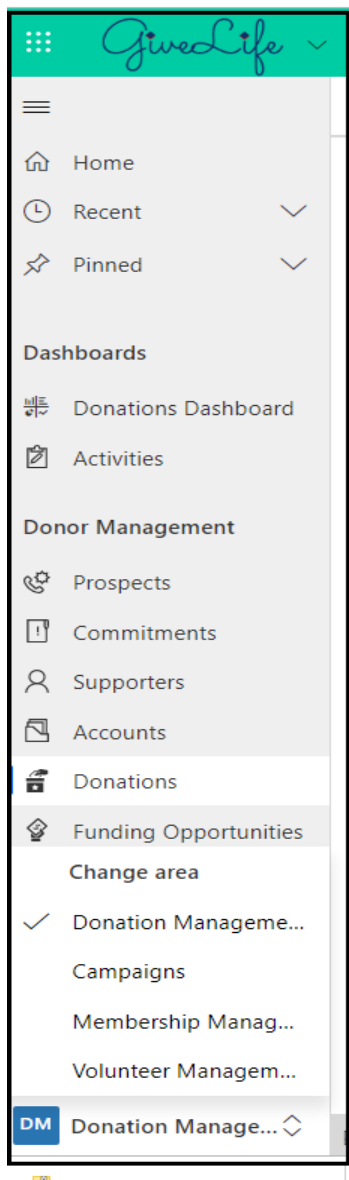
General

Member Sign-Up Name	*	---
Member Sign-Up ID		---
Donor Type	*	---
Membership Plan	*	---
Discount (%)		0.00
Final Amount		---
Billing Interval		---
Member Sign-Up Status	*	Active
Status Reason		Draft
Start Date	*	---  --- 
End Date		---  --- 
Description		---

Enter the required details and click save.

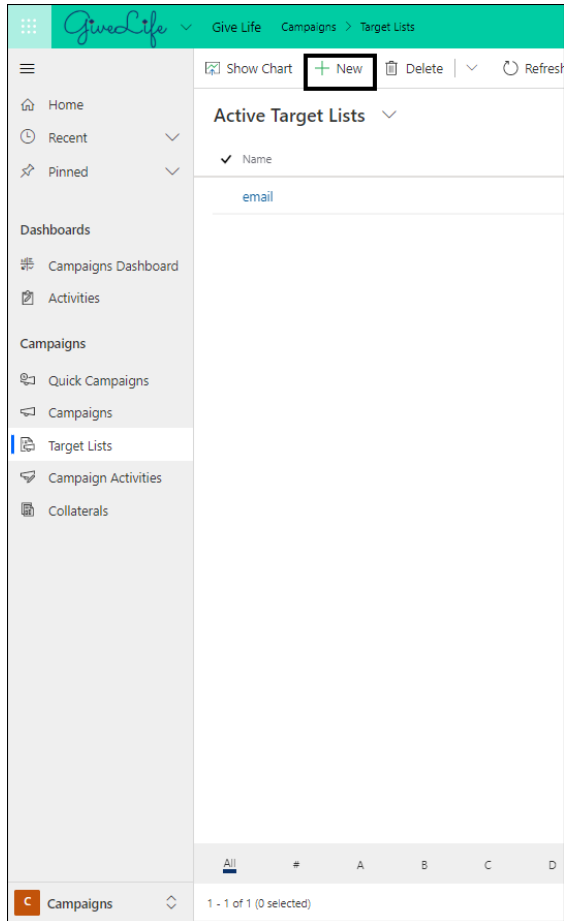
You shall be able to create the various fundraising events using the campaign management, segment the target list and add various campaign activity to a campaign like bulk email, Phone calls using this module.

Go to the campaign management section by clicking on the campaign from the sitemap dropdown located at the bottom left corner of the screen.



9. Create Target List

Click on the Target list from left hand navigation pane



Click +New button location in the ribbon above Target list view, it will open a new target list creation form.

Enter the Required details and click Save.

Once the record is saved. Click on the Members tab

Target List

Locked | Last Used on (Date) | Owner

Summary

Members

Notes

Related

Members

Add

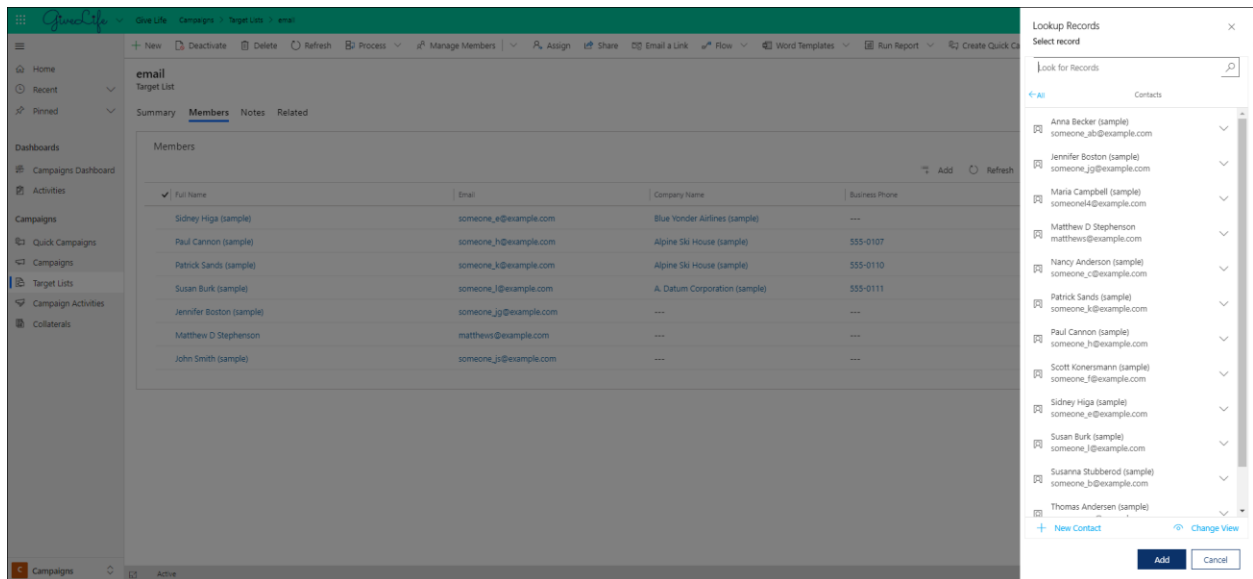
Refresh

Quick Campaign

Run Report

<input checked="" type="checkbox"/> Full Name	Email	Company Name	Business Phone	Status
Sidney Higa (sample)	someone_e@example.com	Blue Yonder Airlines (sample)	---	Active
Paul Cannon (sample)	someone_h@example.com	Alpine Ski House (sample)	555-0107	Active
Patrick Sands (sample)	someone_k@example.com	Alpine Ski House (sample)	555-0110	Active
Susan Burk (sample)	someone_l@example.com	A. Datum Corporation (sample)	555-0111	Active
Jennifer Boston (sample)	someone_jg@example.com	---	---	Active
Matthew D Stephenson	matthews@example.com	---	---	Active
John Smith (sample)	someone_js@example.com	---	---	Inactive

In the members tab, click on the +Add to choose the records to be added to this target list.



The screenshot shows the GiveLife software interface. The main window displays the 'Members' tab for an 'email' target list. A table lists members with columns for Full Name, Email, Company Name, and Business Phone. A '+ Add' button is visible in the top right of the table. A 'Lookup Records' dialog box is open on the right, showing a search bar and a list of contacts. The 'Add' button at the bottom of the dialog is highlighted.

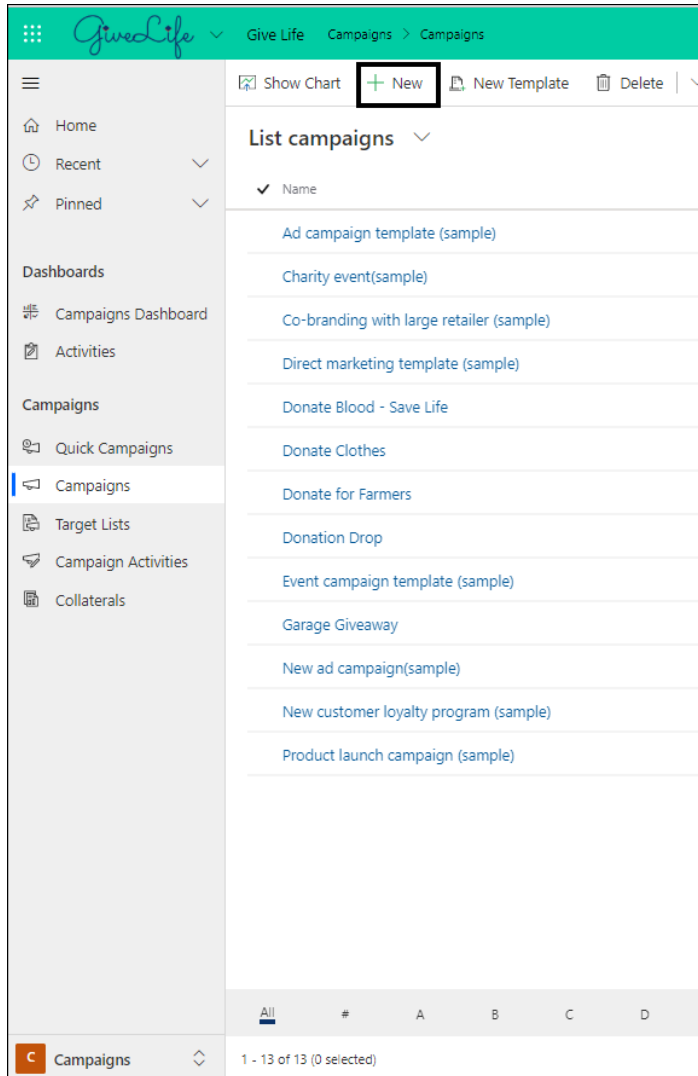
Full Name	Email	Company Name	Business Phone
Sidney Higa (sample)	someone_e@example.com	Blue Yonder Airlines (sample)	---
Paul Cannon (sample)	someone_h@example.com	Alpine Ski House (sample)	555-0107
Patrick Sands (sample)	someone_h@example.com	Alpine Ski House (sample)	555-0110
Susan Burk (sample)	someone_j@example.com	A. Datum Corporation (sample)	555-0111
Jennifer Boston (sample)	someone_j@example.com	---	---
Matthew D Stephenson	matthews@example.com	---	---
John Smith (sample)	someone_j@example.com	---	---

Click Add once you have selected the desired target records to add them in the target list.

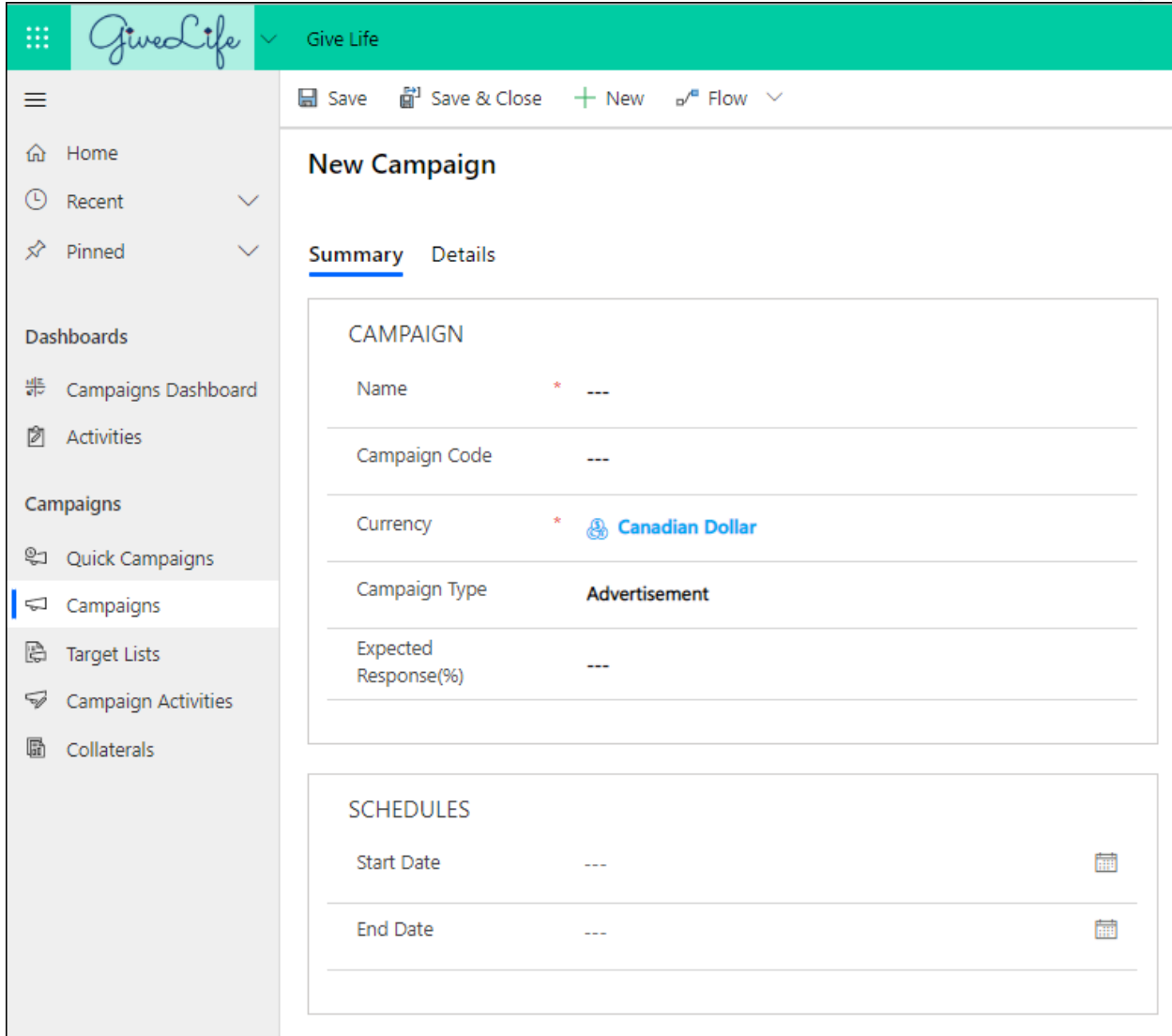


10. Create Campaigns

Click on the Campaigns from left hand navigation pane



Click +New button location in the ribbon above campaign view, it will open a new campaign creation form



Enter the required details and click save.

Once the record is saved, go to the Target List section and click on ellipsis sign



Click on Add Existing Target List and choose the previously saved target list. You can also add activities to a Campaign by clicking on the ellipsis sign on Campaign activities section in Campaign detail page.