

**eGIVE SYSTEMS VERSION 4, 2008  
INSTRUCTION MANUAL**

Last updated 17/01/09

This manual is divided into two parts. These are:

1. Part One - **SERVICES AND FUNCTIONALITY PROVIDED BY eGive**
2. Part Two - **HOW TO USE EGIVE**

**Note that most areas of the website also have online help available which you can view when hovering over the relevant “?”**

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## PART ONE - SERVICES AND FUNCTIONALITY PROVIDED BY EGIVE

### A. Summary of services (modules)

eGive Systems provides a number of web-based services for non-profits and small businesses. These **MODULES** include the following:

1. **Payment Facilities** (credit card and direct debit) allowing the processing of (among others):
  - DONATIONS,
  - MEMBERSHIP PAYMENTS
  - PURCHASES
  - CONFERENCE FEES
2. A **Donation interface** allowing supporters to make donations via credit card, recurrent credit card or direct debit.
3. A **Membership interface** allowing supporters to join an organisation.
4. An **Online Shop (ecommerce)** allowing organisations to trade online.
5. A **Conference Manager** allowing supporters or clients to register and pay for conferences, workshops and meetings.
6. A **Campaign Manager** allowing organisations to send emails, newsletters and other information to contacts stored in their online database (provided free with eGive).
7. **Campaign tools such as ActionFax and ActionSMS** facilities allowing online communication from a web site directly to decision makers.
8. An **Application Programming Interface** allowing users to set up forms on their own website and use our payments gateway.

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### B. How does eGive work and important things to understand (eg security)

#### 1. Signing up to use eGive

Simply sign up online - visit the eGive home page [www.eGive.org.au](http://www.eGive.org.au) and follow the links

#### 2. Security and backup

eGive is a 128 bit encrypted web site with data security ensured by daily server backup.

#### 3. Data storage

All data (such as contact and financial details on your supporters) is stored in a password protected database (CRM - Contact Relationship Manager) which only you, the people you authorise and the eGive administrator can access.

#### 4. Modules and Integration:

Because all modules work from the single centralised database (CRM) and all information is stored there, the system is **highly integrated** allowing organisations to manage their operations including administration, databases, e-commerce, membership, donations, communications and some aspects of campaigns through a single integrated interface, at a highly affordable price.

#### 5. A Public Interface and a private interface

A big advantage of eGive is that it has **TWO INTERFACES** - and 3 points of access. There is an interface for the general public (either via eGive or your website) and a password protected administrative interface for your organisation. Visitors can access eGive directly (ie via eGive.org.au), indirectly via a link from your website that takes them to your pages on eGive.org.au or it can be accessed via your organisation from the back end.

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### C. Description of Services (MODULES) - Details

1. **PAYMENT FACILITIES** (credit card and direct debit) allowing the processing of (among others):

There are three payment facilities which can be used:

- **Single Credit Card:** A once-only payment may be made via credit card
- **Recurrent Credit Card:** A recurring payment may be made via credit card
- **Direct Debit:** A payment may be made from a persons or organisations bank account

Using these payment facilities you may accept payments for a variety of purposes including **donations, membership payments, purchases of goods and services, conference fees, projects**

2. **DONATION INTERFACE** allowing supporters to make donations via credit card, recurrent credit card or direct debit.

Using a payment form a member of the **public** may make a donation to an organisation. This form can be accessed either directly from eGive or via a link from your organisation's web site. Alternatively an **organisation** may receive a telephone, mail or fax authorisation and enter the data directly into eGive using the administrators form. All data is stored in the CRM (except quick donation data - see note later).

#### Features include:

- Automated receipting (with "switch off" option)
- Message template (allows you to modify text in receipts and other auto messages)
- Credit card expiry reminder (lets you know when a supporter's credit card is about to expire)
- Set period function (allowing you to set the date on which a recurrent payment finishes)

3. A **MEMBERSHIP INTERFACE** allowing supporters to join an organisation.

Using a payment form a member of the **public** may join an organisation and pay a membership fee. This form can be accessed either directly from eGive or via a link from your organisation's web site. Alternatively an **organisation** may receive a telephone, mail or fax authorisation and enter the data directly into eGive using the administrators form. All data is stored in the CRM (except quick donation data - see note later).

The system allows you to set up as many **membership categories** as you wish, including **life membership** and **free membership**.

**Features include:**

- Automated receipting (with "switch off" option)
- Message template (allows you to modify text in receipts and other auto messages)
- Credit card expiry reminder (lets you know when a supporter's credit card is about to expire)
- Set period function (allowing you to set the date on which a recurrent payment finishes)
- Membership expiry reminder function.
- Membership period function (allows you to set the duration of the membership)
- **Import** member function - allowing you to import members from your existing membership list in their **existing categories**

4. An **ONLINE SHOP (ecommerce)** allowing organisations to trade online.

This module allows you to set up an online shop for either goods or services and to sell these services online. Design your own online shop, with your own design interface. Upload images and descriptions of your products, set up mailing rates and taxes. Or for electronic products such as images or publications simply upload the entire item and allow the public to pay for and download the product. You can add categories of products and then the products themselves. The shop acts like all normal online shops with a shopping basket to which the client can add their purchases and then pay by credit card (note direct debit not available in this function)

**Features include:**

- Automated receipting (with "switch off" option)
- Message template (allows you to modify text in receipts and other auto messages)
- **Attribute Manager** (allowing you to set multiple attributes such as colour, size)
- Image upload
- **Shipping Manager**
- **Tax Rate Manager**

5. A **CONFERENCE MANAGER** allowing supporters or clients to register and pay for conferences, workshops and meetings (NOTE: Not all functions currently active - upgrade to be completed October/November 2008).

This module allows you to run you a conference online and accept payment for conference registrations. You can run multiple conferences, upload information on them, sell seats for conferences and workshops and a range of other functions listed below:

**Features include:**

- Automated receipting (with "switch off" option)
- Message template (allows you to modify text in receipts and other auto messages)
- Upload conference summary and details

- Set up and register workshops in addition to many plenary
- List major speakers and upload conference papers etc
- Manage accommodation and meal requirements (including special needs)

**NOTE: While this module is operational it is still under development and some aspects such as the meal and accomodation requirements and workshop functions are not currently operational**

6. A **CAMPAIGN MANAGER** allowing organisations to send emails, newsletters and other information to contacts stored in their online database (provided free with eGive).

This feature is primarily designed for campaigning organisations which wish to use the eGive CRM as their principal database. It allows organisations to send emails, newsletters or other communications to their supportrs or members stored in the CRM. It may also be used for marketing and fundraising purposes and or simply for communications.

The CRM allows supporters to be separated according to sex, profession, age, address, electorate and in many other ways so that organisations can communicate with all or part of their supporter list stored in the database. It can also be used in the same way for fundraising if so desired. Using a template or wysiwyg you can design an email or a newsletter which can be emailed to all or part of your client list.

7. **CAMPAIGN TOOLS** such as ActionFax and ActionSMS facilities allowing online communication from a web site directly to decision makers.

If you are campaign organisation you can communicate directly with the supporters in your CRM using our **ActionSMS** facility. This can be used to send urgent action alerts, information about public meetings, rallies or for may other functions (such as shop sales for example).

Using **ActionFax** you can set up a letter to decision makers on your own web site and have them fax to decision makers using our ActionFax facility. This sends a preset message you write to a decision maker (politician, business leader) directly from the individual using the interface on your website.

8. **APPLICATION PROGRAMMING INTERFACE (API)**. This module allows your organisation to access eGive's payment gateway without the payment without having to use the payment forms on eGive itself.

Using the API the public user completes the payment form on your own website and does not leave your site. The information is then passed via eGive, stored in the eGive CRM and passed to the Gateway for processing.

## 9. OTHER FEATURES

- **Self-managed client interface.** eGive is entirely automated and self-managed. No time consuming wait for others to set up your service for you. Simply sign-up online, set up your own self designed interface including logo, banner, colour scheme and as many web pages as you want (using an online content management system).
- **Form Manager.** This feature allows you to control the fields that appear on the donation forms. eGive dictates a certain minimum number of fields (eg email, primary phone) but other than these minimum fields you may add or remove a range of other fields depending on the level of information you wish to gather about your supporters.

- **Card Expiry Manager:** This function lets you set the intervals at which you and the client will receive reminders about the expiry date on a credit card.
- **Client Category:** This is an important function if you plan to use eGive for campaign or fundraising purposes and therefore want to email them. You can set up categories such as **journalist, supporter, donor, major donor, politician**. This allows you to segregate your mailing list so that you can mail to particular sub sections of your list.
- **Campaign Type Manager:** This feature allows you to set up particular campaigns such as types of activist campaigns, marketing campaigns and fundraising campaigns and to add lists which you have already segregated to the materials you have created for these campaigns.
- **Database/CRM:** A sophisticated searchable online CRM (database) which stores data on all clients, supporters, members and donors. When a visitor to your eGive web pages makes a payment or donation their details are captured by the CRM so you don't have to enter this data. Using this database you can manage all your clients including donors, members, attendees at conferences, people purchasing via your ecommerce interface, people accessing your ActionFax (a campaign tool) and ActionSMS services.
- **Permission module** this offers you the ability to assign different rights to different users. In other words, when you give any new user (such as staff member, board member, volunteer) access to your administrative interface, you must assign an access level - how to use this system is explained in the second part of this manual.

Using the CRM you can:

- Upload and download contacts from other databases and lists
  - Access your clients from anywhere in the world where you have internet access
  - Enter donations or payments from your clients including credit card and direct debit payments
  - Email to your clients (either entire lists or parts of the client list)
  - Send newsletters to your clients (entire list of parts of the client list)
- **Project Donation interface:** Donors may donate not just to your organisation but to specific projects, our donation interface allows donors to do this. Donations to each project are recorded separately in your interface to allow easy tracking
- A **Content management system** allowing you to design your own web pages which visitors will view when they visit.
- **Online transaction records:** All of client records and transactions are viewable via an online interface which shows records for each type of transactions, as well as recording cost of each transactions, invoices for use of eGive services and payments (remittances) to each organisation.
- **Automated receipting:** All payments are automatically receipted (though this facility can be switched off if required). An interface is also provided where for recurrent donations a single receipt can be provided at the end of the year along with a covering letter designed using a template.

## PART 2 - HOW TO USE eGive

This section of the manual describes use of the **ORGANISATIONAL ADMINISTRATIVE INTERFACE**. This is the interface organisations use for managing the services (modules) they have purchased. To access this interface organisations must login using the username and password with which they have been provided.

**IMPORTANT NOTE ABOUT THE STRUCTURE OF eGive ORG ADMIN INTERFACE:** eGive operates via a series of TABS which allow you to access various functions.

- **The top level of TABS** (running from left to right - CRM, Payment Donation, Conferences, Membership, Projects etc) are **operational tabs** **EXCEPT THE IMPORTANT SETUP OPTION TAB**

You use these to add new records and view transactions once you have set up the operating parameters for your use of eGive.

- **The SETUP OPTION tab** is where you set the operating parameters for most modules such as Ecommerce, Membership etc and for a range of common functions for all modules such as **CARD EXPIRY, LINK GENERATOR** etc. Within **SETUP OPTION** you will find the TABS and SUB-TABS for almost all the important operating parameters for eGive modules

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### THE ORGANISATIONAL ADMINISTRATIVE INTERFACE

Login via the Home page: [www.eGive.org.au](http://www.eGive.org.au)

#### 1. Entering/Changing your organisational details

When you first register for eGive you should have entered your organisational details, chosen your **PLAN** and set up your **WEB SITE**.

**IMPORTANT NOTE:** You will not be able to access eGive (ie your registration will not be activated) until you have completed ALL steps of the registration process. This important requirement prevents members of the public encountering unfinished web pages on eGive and thereby protects all our clients.

To enter or change organisation details **SETUP OPTION** tab and then on the **ORGANISATION DETAILS TAB**. on the “Organisation Profile” tab

Within this area there are the following additional options. Click on the relevant **TAB** to access each of these areas:

- **Update organisation tab:** Whenever you need to make a change to your organisations details (eg address, bank account) you can amend them in this section.
- **Plan Details tab:** View the modules and plans available and select your options. You may select existing options or create your own plan from the available modules. **Note that within the list of “Available Plans” you may only select one radio button. When you click on one radio button it automatically cancels any previous selection you have made.**
- **Web Pages Design tab:** Upload your logo and banner, select your background colours for your pages and enable other options to appear on your website (these are the pages that will appear for your organisation within eGive).

- **Create Web Pages tab** : Add and set up the web pages for your organisation which will appear on eGive and select the names of these pages, including additional pages (there are two pages which automatically exist as default pages these are the home page and contact us page). You may set up as many pages as you want. Once created this also creates a link to these pages on the right menu on your home page within eGive. Once the pages have been set up you use the Web Pages Content tab to enter content on each page.
- **Web Pages Content tab**: You use this area to write the actual content of each web page and upload images using the CMS up the content for each of the web pages you have just established using the Create Web Pages function, above. Select the page to which you want to add text by using the drop down box on the right.

## 2. Donations and payments - setting up and managing donations and payments

Donations and payments are currently an integrated system but will be separated during the first quarter of 2009. Donations and payments can be set up, changed, or stopped either by an **individual donor/payee** (using the public interface) or by an **organisation** (using the administrative interface).

This manual deals with an organisation's use of the interface. All donations and payments are managed from within the CRM. Click on the **CRM tab**. To set up a donation or payment you must first set up a new record for the person within the CRM. You do this by clicking on "new". Then enter the details and click "save". Once you have established the person's record, you can then enter a donation/payment by clicking on the **Payment/Donation tab**. You then select the **type of payment** by clicking on the relevant tab as shown below:

- For a "one-off" (non-recurrent) payment/donation click on **CC Payment/Donation tab**
- For a recurrent credit card payment/donation click on **RCC Payment/Donation tab**
- For a Recurrent direct debit payment/donation click on **RDD Payment/Donation tab**

In each case you then click on the relevant "make" or "create" payment button and then fill out the relevant forms. Note that for recurrent payments you may also establish a **frequency and a start and finish date**. In the case of the start and finish dates you should only use the finish date if the donor/payee has specifically requested that their payment finishes on a specific date. **Do not use it if the donation is ongoing.**

**Note that if you want the donation/payment to go to a specific project you need to select this in the interface also.**

To **MODIFY** a donation/payment you should first open the payment record within the RCC or RDD payment tab and then click on the "modify" button on the extreme right hand side of the screen. In the subsequent screen that appears enter the new credit card or bank account details or the new amount or interval that is required and click save.

You may also make a donation or payment **inactive or active** by clicking on the green or red button. A green button means the payment/donation is active and red, inactive.

**Important note: AUTOMATIC DE-ACTIVATION:** A donation or payment that fails for any reason (change of credit card details, or bank account details or insufficient funds for example) will automatically be de-activated by the system. You will need to edit the details as stated above, including setting a new start date for the next transaction, then save them and then re-activate by clicking the red button so that it changes to green.

3. Conferences - setting up and managing conferences and conference registrations by clicking on the “Conferences” tab

Use the main **top level conferences tab** to create and name your conference, using the **new tab** on the right hand side of the Setup conference tab.

Once the conference has been set up you can manage the parameters for this conference using the **conferences tab** within the **SETUP OPTION tab**.

Using these two tabs you set up your conferences, name them, set pricing, conference numbers, venue, description of conference, meal preferences, speakers lists, conference papers , accommodation requirements and other relevant information.

Your conference transaction list for each conference can also be viewed in this area by clicking on “Conference Transaction List” tab. You can view further details about each individual transaction by clicking on the “transaction ID”

Public users can purchase conference places using the Conferences tab on your public web site interface within eGive.

Organisations (i.e. you) can also create conference purchases for individual users by going to the CRM, clicking on the clients name and then clicking on the conferences tab which will appear.

**NOTE: While this module is operational it is still under development and some aspects such as the meal and accomodation requirements and workshop functions are not currently operational**

3. Set up Membership plans by clicking on the “Membership” tab

Use this module to set up your membership plans, costs and renewal intervals. All parameters are set using the **top level membership tab**, except for the **renewal reminder function which can be found within the SETUP OPTION tab**.

Membership transactions can be viewed by clicking on the “Membership Transaction List” tab

Public users can purchase memberships from the Membership tab on your public web site interface within eGive.

Note that organisations (ie you) can also create membership purchases for individual users by going to the CRM, clicking on the clients name and then clicking on the membership tab which will appear.

Membership also provides an import function through which you can **import** your existing members in their existing member categories.

4. Set up Projects by clicking on the “Projects” tab

Use this module to set up projects to which you want donors to donate (as opposed to donating to your organisation)

NB: Environmental Projects set up here will also appear on the Environmental Projects Australia web site and Social Projects will appear on the Social Projects Online web site.

Users may donate to any project set up in this area and their donation will be separately

listed in the reports interface under this project heading.

5. **Set up E-commerce (products) by clicking on the “E-Commerce” tab**

Use this module to set up your e-commerce (sales) facility. This can be used to sell both physical products via mail order and electronic products (such as images) via download.

First set up your **Categories** (eg books, calendars, posters, foods etc etc). Once you have set up the categories, you must next set up the various tax zones and other attributes. You can access these via the **Setup Option tab and then the E-Commerce tab within that.**

Then once these have been established you can set up **individual items (products)** within each category by clicking on the category name which will open a window to add new items. In this area tax and pricing can be added (note mailing costs are added in the “website set up” area. Categories and individual products can be activated and de-activated.

Note that unlike conferences and memberships you (client organisations) **cannot purchase products for your clients from within the CRM** - all e-commerce purchases have to be performed via the public interface.

6. **Set up communication and campaign tools by clicking on the “Communication” tab**

Use this module to set up:

- Emails to go clients, supporters or members (either individuals or lists),
- Newsletters (free or paid) for emailing to clients, supporters etc.
- Campaigns (if you want potential donors etc to be associated with particular campaigns - in response to a mail out for example)

**6a. Emails:** Click on the **Communications tab** then the **Emails tab** to access this function. First name and write your email then click on **next**. This takes you to an interface where you can add your mailing list.

**Sending your email:** There are four options for mailing which are selected using radio buttons:

- Email to a single individual
- Email to all CRM members
- Email to the newsletter (this is the list of people you have previously associated with your newsletter using the “Associate with newsletter” option in the CRM)
- Email to a campaign list - this is a list associated with a particular campaign and is set up within the **Campaign tab**. For instructions about how to set up a campaign and an associated list please see the section on campaigns below.

**6b. Newsletters: Emails:** Click on the **Communications tab** then the **Newsletter tab** to access this function. Within this area you have three initial options you can:

- Send an existing newsletter you have previously created (or edit and send this newsletter)
- Create a new newsletter using the WYSIWYG provided and then send it.
- Import an existing document or letter etc and send it.

Having created your newsletter/document you then send it using the same process as for emails described above under **sending your email**

**6c Campaigns:** You can access the create campaigns by clicking on the **Communications tab** and then the **Campaigns tab**

You may run multiple campaigns for a variety of purposes such as fundraising, marketing, sales, or traditional environmental or human rights campaigns for example. Before setting up a campaign you should however **FIRST** set up your **Campaign types and your Category types within Setup Option**, because this allows you to segregate your list by these categories when setting up your mailing, rather than having to later go back and do this individually for each client at a later stage.

To set up a **new** campaign simply click on the **new button**. Then fill in the details using the help guides provided. Once your campaign has been set up you can associate particular groups of individuals with it for different purposes (for example politicians, groups of your members etc) and undertake specific email or other communication campaigns with them. In order to associate a campaign with a particular mailing list you click on **Subscribers tab** within the campaign tab and then you create your list of subscribers using the search tool. Finally having created the list you can choose to associate all or some of the subscribers with the campaign.

You may also create a list of documents and campaign individuals associated with a campaign by adding documents and contact details to the campaign (**note this function still under development**)

7. **Set up ActionFaxes** by clicking on **ActionFax**

To allow the public to send faxes from your web site to politicians and other decision makers (NOTE this function not available until December 2008)

8. **Set up ActionSMS** by clicking on **ActionSMS**

To allow the public to send SMSs from your web site to politicians and other decision makers (NOTE this function not available until December 2008)

9. **Set up your API (Application Programming Interface)**

Detailed instructions on setting up your API are provided here. Please click on the link: [http://www.egive.org.au/docs/egive\\_api.doc](http://www.egive.org.au/docs/egive_api.doc).

You will also need to download the document that explains how to integrate your API into your website. Click here: [http://www.egive.org.au/docs/sample\\_api\\_integrations.doc](http://www.egive.org.au/docs/sample_api_integrations.doc).

NOTE: You will require some level of understanding of HTML code to integrate your API.

9. **Set up Options** by clicking on the **“Setup Option”** tab

Use this module to:

- Add users (eg staff members) allowed to access your eGive interface.
- Set up your currency converter to allow non-Australian usage.
- Set up tax rates
- Set up shipping rates
- Set up email templates - this function allows you to set up different email responses (eg receipts) for each type of transaction. To select which type of transaction you want to set up a email response for select it from the drop down box **“Select Template”** in the top right hand corner.

- Set up your Links - these are placed on your own web site to allow clients to link directly to your pages on eGive. While the link will take you to the relevant area you can place buttons or wording of your choice on your web site to identify to your client the function of the link.
- Set up your client categories and Campaign Types

## 10. **Reports interface**

Use this interface to view reports on your transactions and lists of clients and their individual transactions, as well as creating receipts for those transactions to be sent to clients via email.

There are three separate components to the reporting interface each accessed via their own **Tab - Reports, Remittance and Invoice**.

**Custom report:** This interface provides a report about any type of transaction relevant to your organisation within any chosen date range, including donations to specific projects, as well as providing an ability to categorise by successful or unsuccessful transactions.

Note that in order to produce a transaction for a specific module/function (such as conferences) you must tick the box for that area. If you tick more than one box the system will produce a list of transactions for both modules/functions.

**Remittance reports:** This interface will produce a list of remittances made to your organisation. These are categorised according to the source of the funds (eg conferences) and can be searched by date range.

Note that by clicking on column headings (eg CC) a list of transactions of this type which comprise the remittance total for one-off credit cards transactions is produced and you can also view each individual transaction by clicking on the transaction ID.

**Invoice:** Will show invoices for the fees you have paid. They show both transactions fees and monthly fees and are deducted directly from your bank account monthly.