

# Workplace Giving Platform

## User Guide

Charity Giving Centre



[www.good2give.ngo](http://www.good2give.ngo)

good2give®

# Contents

<b>3</b>	<b>Introduction</b> What is workplace giving? Who is Good2Give?
<b>4</b>	<b>Registration &amp; sign in</b>
<b>6</b>	<b>Overview of the Charity Giving Centre</b> Updating personal details
<b>7</b>	<b>Four tabs - four charity functions</b> Dashboard Communications Profile Reports
<b>8</b>	<b>Charity Giving Centre - Dashboard Page</b>
<b>10</b>	<b>Charity Giving Centre - Communications Page</b>
<b>12</b>	<b>Charity Giving Centre - Profile Page</b>
<b>14</b>	<b>Editing your charity profile</b>
<b>16</b>	<b>Sharable links for charity projects</b>
<b>17</b>	<b>Reports - Donations Performance</b>
<b>18</b>	<b>Reports - Donations by Organisation</b>
<b>19</b>	<b>Reports - Donations Received</b>
<b>21</b>	<b>Charity communication process</b> Create a a message to donors Communication content guidelines
<b>23</b>	<b>Charity payment process</b> Individual donations and company matched donations Charity payment confirmation email and CSV file
<b>24</b>	<b>Donor payment confirmation and charity updates</b> Charity records updated in the Charity Giving Centre
<b>25</b>	<b>Enquiries</b>

# Introduction

Welcome to Good2Give's Workplace Giving Platform! We have designed this platform to make donating easy, secure and rewarding for charities and donors alike. This user guide gives you an overview of the functions of the Charity Giving Centre for communication management to donors who support your charity, for reviewing reports of donations and for viewing and editing your profile page.

## What is workplace giving?

Workplace giving provides staff the opportunity to make a pre-tax donation to a registered charity directly from their pay. This reduces employee's taxable income immediately to ensure the financial benefits of giving are felt with their next pay.

Charities also no longer have to administer tax-receipts at the end of the year, providing both donors and charities the most efficient and simple model of giving yet.

Employers also have the opportunity to match employee donations and cover all program related expenses to ensure their workplaces' goodwill goes further.

## Who is Good2Give?

Founded in 2000, Good2Give is a not-for-profit organisation that makes it easy for businesses and donors to connect with the charities that matter to them.

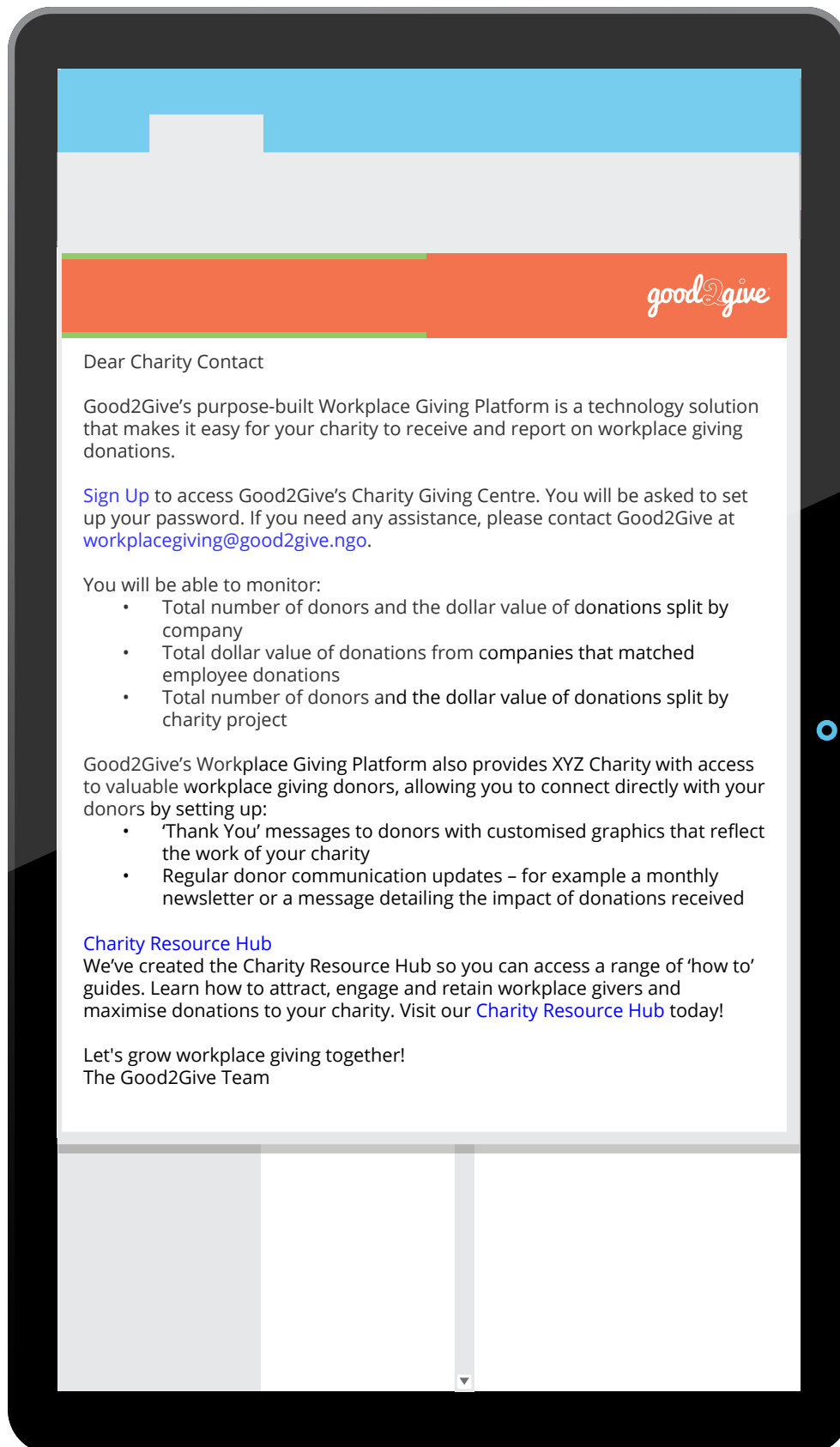
Committed to building a more giving society, we advise businesses on how to engage with charitable organisations and provide technology solutions to efficiently and securely process company and employee donations.

We're now over half way towards our target of delivering \$300 million to charitable communities across Australia and New Zealand by 2020.



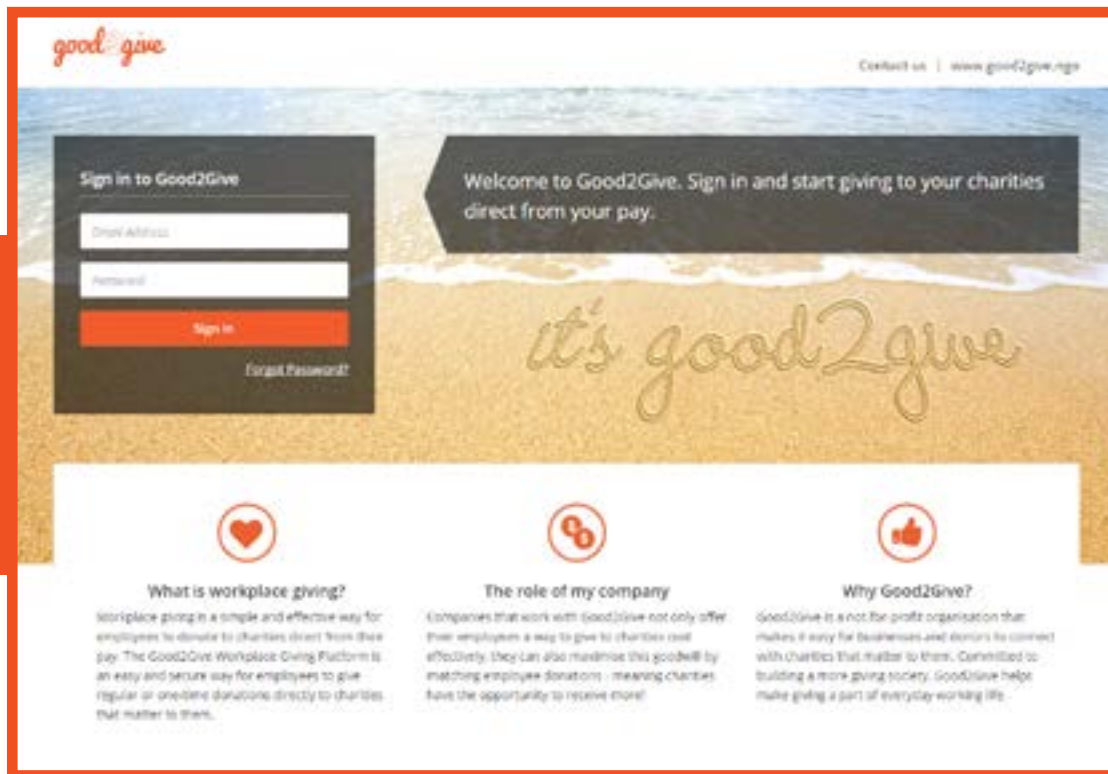
# Registration & Sign In

As an authorised charity contact using the Charity Giving Centre for the first time, you will be sent the following email invitation:



# Registration & Sign In

Click on the Sign Up link to be taken to the Charity Giving Centre Sign in page:



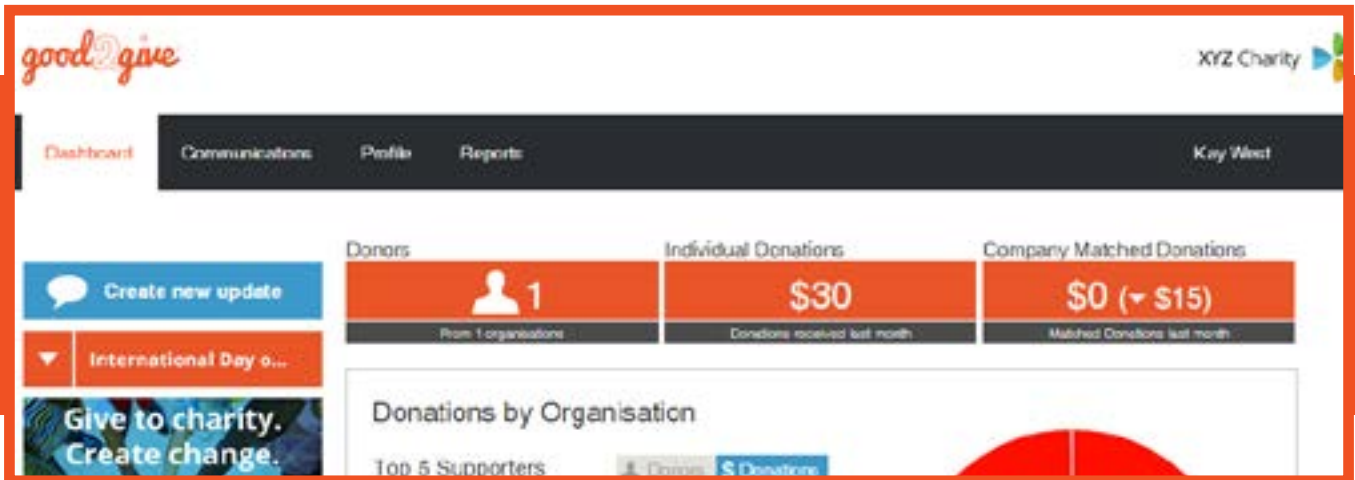
Create and confirm your password to be taken to the Charity Giving Centre. Please follow these guidelines when choosing your password:

- Make a password for your account that is at least eight characters long using a mixture of letters (including at least one capital letter) and numbers and/or symbols
- Don't use personal information such as your user name or a common word such as 'Password' or 'Qwerty', and
- Don't use the same letter or number multiple times in a row, or a run of letters or numbers in order (e.g. ABC or 123).

In future, you will be able to sign in to the Charity Giving Centre on this page via the link:  
<https://my.good2give.ngo> using your User Name (email address) and Password.

# Overview of the Charity Giving Centre

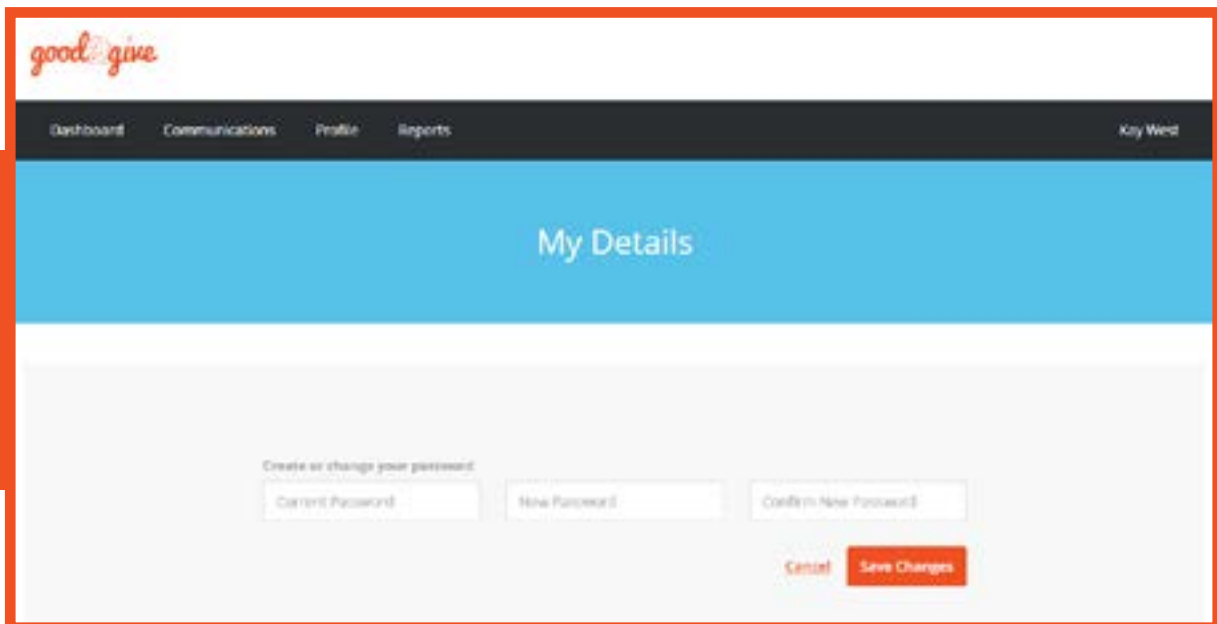
Once you sign in to our Workplace Giving Platform you will be taken to the dashboard page in the Charity Giving Centre:



Refer to [page 7](#). Charity Giving Centre – Dashboard Page for a description of this page.

## Updating personal details

To update your personal details and password at any time, click on your name to be taken to your profile page to complete these changes:



# Four tabs - four charity functions



Use these to manage employee details. Click below the titles below to jump to the relevant page.

## **Dashboard**

Review individual donations and company matched donations that were confirmed in the previous month and included with Good2Give's charity payout in the current month.

## **Communications**

Create and send 'Thank You' messages to new donors and 'Regular Updates' to all donors currently supporting your charity through workplace giving.

## **Profile**

View and edit your charity profile.

## **Reports**

Review Donations Performance Reports, Remittance Reports and Donations by Organisation Reports within a customised date range.

# Charity Giving Centre - Dashboard page

The dashboard for 'good2give' (XYZ Charity) includes a navigation menu with 'Dashboard', 'Communications', 'Profile', and 'Reports'. A 'Key West' button is also visible. The main content area is divided into several sections:

- 6**: A 'Create new update' button.
- 1**: A 'Donors' section showing 'From 1 organisations'.
- 2**: An 'Individual Donations' section showing '\$30' from 'Donations received last month'.
- 3**: A 'Company Matched Donations' section showing '\$0 (< \$15)' from 'Matched Donations last month'.
- 7**: A sidebar with a 'Give to charity. Create change.' banner for 'International Day of Charity' and several campaign buttons: 'Disaster Relief A...', 'Ebola Outbreak 25...', and 'Syria Crisis Appea...'.
- 4**: A 'Donations by Organisation' section featuring a 'Top 5 Supporters' table and a donut chart. The table lists '1 Sydney Water' with '\$30'. The donut chart is labeled '% of total donations' and shows a red segment for 'Sydney Water'. A 'View Full Report' button is at the bottom.
- 5**: A 'Donations Received' bar chart comparing 'Individual Donations' (blue) and 'Org Matched Donations' (green) from August to July. The Y-axis ranges from 0 to 80. Individual donations peak in November at approximately 46, while org matched donations peak in February at approximately 75. A 'View Full Report' button is at the bottom.

Refer to the table overleaf for an overview of each item numbered above.



# Charity Giving Centre - Dashboard page



All information on the Dashboard Page is based on funds from workplace giving individual donations and company matched donations that were last processed and confirmed. The information on the Dashboard page is updated with each payout, which occurs around the 10th of the month.



## Donors

Total number of donors across all organisations who donated to your charity and if the total number of donors has changed compared to the previous month's payout (in brackets). Underneath is a field that indicates the number of organisations you received donations from in the previous month.



## Individual donations

Total \$ value of donations from individual donors (employees) who donated to your charity and if the total value of individual donations were up or down compared to the previous month's payout (in brackets).



## Company matched donations

Total \$ value of donations from organisations that matched individual donations to your charity the previous month and if the total value of matching donations was up or down compared to the previous payout (in brackets).



## Donations by organisation

Lists the top 5 Organisations supporting your charity by number of employees and total \$ value of donations received. These figures include funds for any projects, donations and matching.

The pie chart displays the top 9 organisations supporting your charity by both number of employees and total \$ value of donations received (place your cursor over either the employee donations or matching part of the pie chart to display the percentage and \$ value relating to that part of the chart). Other combines the donations from all other organisations into one entry.



## Donations received

Graph displaying total donations received by individuals and organisations month by month over the past 12 months up to and including the previous calendar month.



## Create new update

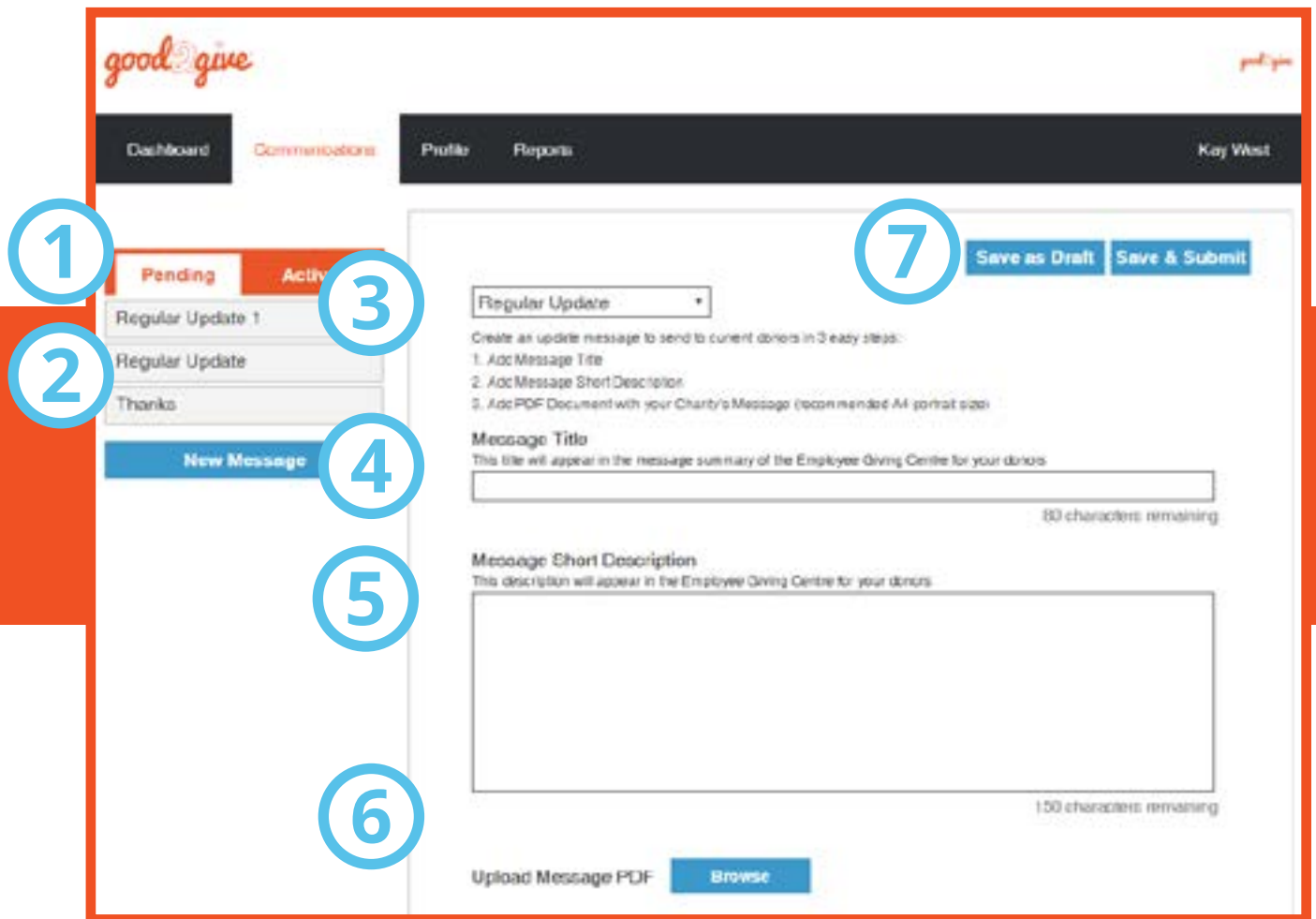
Additional link to the Communications Tab for sending communications to new and current donors.



## Charity project listing

Displays projects individually. Click on the arrow next to each project to display project name, total donations received and total number of individual donors when the project was set up and the project end date (if applicable).

# Charity Giving Centre – Communications page



1

## Message type

Click **Pending** to display the list of messages to be submitted to and/or confirmed by Good2Give before distribution to donors. Select each individual message to display its history and current status in the approval process.

Click **Active** to display a list of messages that have been confirmed by Good2Give and made available to donors supporting your charity in the Employee Giving Centre.

2

## New message

Click to create either a thank you message to new donors or a regular update to current donors.

3

## Message type

Select from the drop down box the message type you wish to create: 'Thank You' for new donors (this message is only received once) or Regular Update (This message is received monthly at the time your charity receives their donation) for current donors.

The Regular Update message is automatically sent to your current donors in the platform, once it has been approved by Good2Give. We encourage you to create a 'Regular Update' message each month.

# Charity Giving Centre – Communications page

4

## Message title

This will appear as the title of the message summary in the Employee Giving Centre for your donors (maximum 80 characters).

5

## Message short description

This description will appear in the message summary of the Employee Giving Centre for your donors (maximum 150 characters).

6

## Upload message PDF

Click **Browse** to upload your 'Regular Update' or 'Thank You' content as a PDF. This should be an A4 portrait sized document for best results.

7

## Save as draft and save and submit

Click **Save as Draft** to save your message and display the PDF you have attached.  
Click **Save & Submit** to save your message and email your message to the Good2Give Workplace Giving Team for approval.

Note: once you have saved your message, the option to delete it will appear next to the send button. Deleting will remove the message from Good2Give permanently.

Note: if the message sent for approval requires edits, an 'edit requested' notification will appear next to the message. Please edit and re-send for approval.

Refer to [page 19](#), The Charity Communication Process, for instructions on how to create a Thank You message and a Regular Update message to Current Donors.



Your messages doesn't go to donors until approved by Good2Give.

# Charity Giving Centre - Profile page

The screenshot shows the profile page for 'Good2Give Research and Technology' on the Charity Giving Centre. The page is divided into several sections:

- 1** **Your Profile**: A section on the left explaining how the charity profile is presented to donors and providing an **Edit** button.
- 2** **Good2Give Research and Technology**: The main header of the profile with an **Add to my giving** button.
- 3** **good2give** logo and **Website** link (HTTPS://GOOD2GIVE.NGO).
- 4** **About Good2Give Research and Technology**: A detailed description of the charity's mission and research work.
- 5** **Mission Statement**: A short statement about the charity's focus on developing learning and technology tools.
- 6** **Add to my giving** button located below the mission statement.
- 7** **Good2Give projects:** A section featuring three project cards: **Cyclone Pam (Vanuatu) 2015 Appeal**, **Disaster Relief and Recovery**, and **Ebola Outbreak 2014 Appeal**. Each card includes a brief description and an **Add to my giving** button.
- 8** **Edit History**: A list of recent profile updates with dates and user names.

Additional elements include a navigation bar (Dashboard, Communications, Profile, Reports), a user name (Kay West), and social media follow buttons for Twitter, Facebook, and LinkedIn.

# Charity Giving Centre - Profile page

1

## Charity profile

Displays the cause area your charity is listed under and can be searched by, the key words (up to 5) donors can use as an additional search function, how your charity appears in search results – donors can:

- Click on 'Add to My Giving' to donate to your charity immediately
- Click on 'Select' to donate to your charity immediately

2

## Charity banner

Displays the charity name and customisable banner colour

3

## Charity heading

Displays the charity name, logo (optimal size 600x600 pixels) and social media links

4

## About your charity

Displays the Charity Description (up to 1,000 characters) and website link

5

## Banner image

Displays the banner image (jpg/png up to 5MB; landscape 3:2 ratio; 375x250 pixels)

6

## Mission statement

Displays the main purpose of your charity (up to 200 characters)

7

## Current projects

Displays the current projects/campaigns – standard (ongoing), crisis (emergency appeal) and Child Sponsorship – in addition to your main charity profile (only if applicable). These are displayed in alphabetical order.

8

## Edit your profile

Click here to edit your profile. See below for further info

# Editing your charity profile

The screenshot shows the 'Your Profile' editing page for 'Good2Give Research and Technology'. The interface is divided into several sections, each with a numbered callout:

- 1**: Cause Area dropdown menu (set to 'Health and Wellbeing').
- 2**: Key Words input field.
- 3**: Charity List Title input field.
- 4**: Profile picture selection area (radio buttons for 'Pick from your palette' and 'Pick from image').
- 5**: Logo selection area with a 'Browse' button.
- 6**: Social media links input field (currently showing 'http://good2give.ngo/').
- 7**: Social media icons for Twitter, Facebook, and LinkedIn.
- 8**: Rich text editor for the 'About' section.
- 9**: Banner image selection area with a 'Browse' button.
- 10**: Mission Statement text area.
- 11**: 'Good2Give projects:' section containing three project cards: 'Cyclone Pam (Vanuatu) 2015 Appeal...', 'Disaster Relief and Recovery', and 'Ebola Outbreak 2014 Appeal'. Each card includes a description and an 'Add to my giving' button.

# Editing your charity profile

1

## Cause area

Select your cause area.

2

## Keywords

Add/remove keywords. Keywords are used as a weighted search function for donors to find your charity. We recommend you use at least 5 keywords.

3

## Charity short description

Edit your short description. Limited to 140 characters.

4

## Charity banner

Choose the colour of your banner from a range of colours or from a colour in your hero image.

5

## Logo

Upload a new logo. Optimal size is 600x600 pixels.

6

## Website URL

Update your website URL.

7

## Social media

Please test links you supply, "@charity" is not a complete URL.

8

## About us

Edit your 'About' section. Limited to 1000 characters.

9

## Banner image

Update your Banner Image. Optimal size is 375x250 pixels.

10

## Mission statement

Update your Mission Statement. Limited to 200 characters.

11

## Your current projects

To create a project [contact Good2Give](#). Edit your Project image (375x250 pixels), Project Description (limited to 140 characters) and the Project URL.

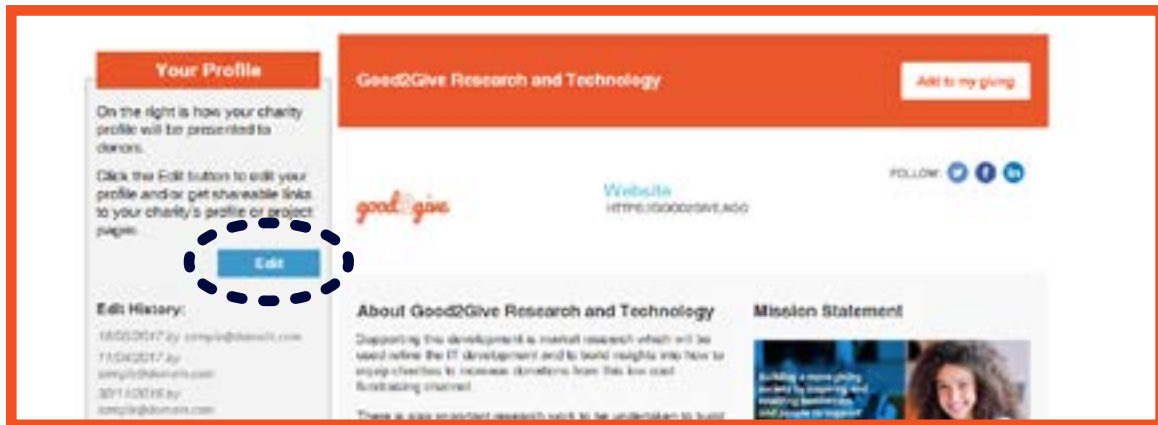
Once you have updated your profile page, click on the 'Save' button above the Cause Area. If you did not wish to update your profile page or made a mistake after clicking 'Edit', simply click 'Cancel'.

# Sharable links for charity projects

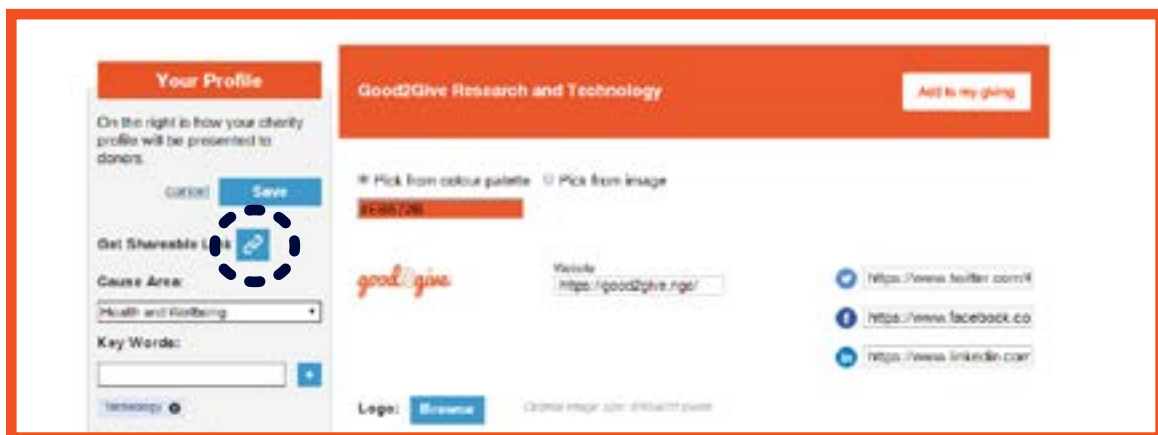
12

Charities can get the shareable link of their projects to use in their regular update messages. This will help you drive traffic to your projects and get more donations.

To get the sharable link, log into your charity profile page, go to the charity profile tab and click on the edit button.



Click on the Get Shareable Link icon.



There the shareable link will be stored in your clipboard once you click ok in the pop-up dialogue box.



Please note that this link only works for donors when they log into the platform and will not work for communications outside of the Good2Give platform.



# Reports - Donation Performance

good2give

Dashboard Communications Profile **Reports** Kay West

**Our Reports**

- Donations Performance
- Donations by Organisation
- Donations Received

**Donations Performance Report** [Export](#)

Month: July Year: 2017 to Month: July Year: 2017 **Run Report**

**Total Donations: \$30**

Matching Donations

Period	# Donors	# Orgs	Donations	Matching	Total
July 2017	1	1	\$30.00	\$0.00	\$30.00

Donations: \$30.00  
Organisation Matching: \$0.00

**Total Donations: \$30.00**

1

## Report duration

Select the month/year from/to and click Run Report to display the report for the period required.

2

## Export

Once you have run the report, click Export to create a csv file version of the data.

3

## Total donations

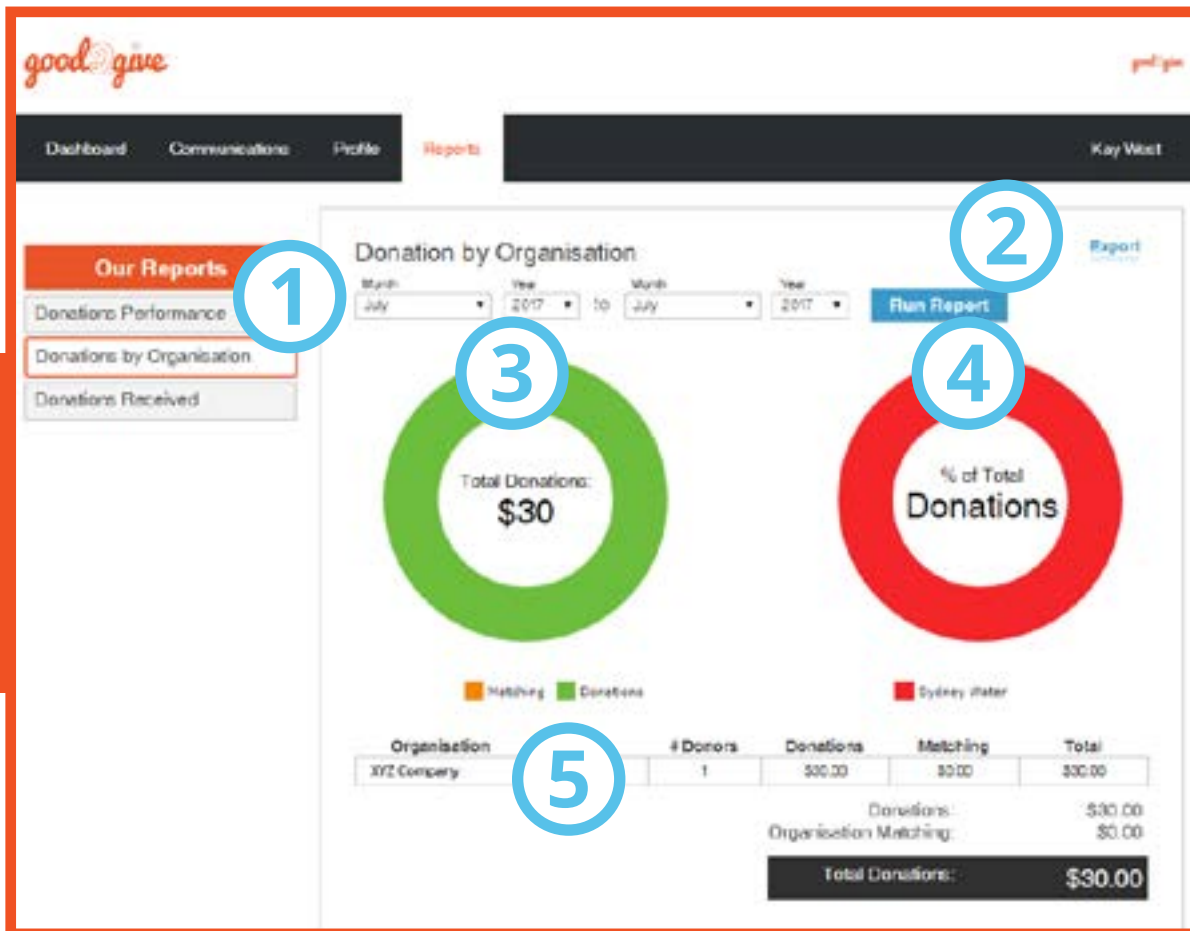
Pie chart displays the total value of the donations, split by employee (individual) donations and company matching donations for the period selected (place your cursor over the pie chart to display the % and \$ value relating to that part of the chart).

4

## Workplace giving donations

Separates each month in the period and displays the monthly total number of donors, organisations, employee (individual) donations, company matching and total of all donations, plus the grand total for the period selected.

# Reports - Donations by Organisation



1

## Report duration

Select the month/year from/to and click Run Report to display the report for the period required.

2

## Export

Once you have run the report, click Export to create a csv file version of the data.

3

## Total donations

Pie chart displays the total value of the donations, portion of employee (individual) donations and portion of company matching donations for the period selected (place your cursor over the pie chart to display the % and \$ value relating to that part of the chart).

4

## % of total donations

Pie chart displays the total percentage of all employee (individual) donations and company matching donations by organisation for the period selected (place your cursor over the pie chart to display the % and \$ value relating to that part of the chart).

5

## Workplace giving donations

Displays per organisation the total number of donors, employee (individual) donations, company matching and total of all donations in the period, plus the grand total for the period selected.

# Reports - Donations Received

**Donations Received Report** [Export](#)

Month: August 2016 to July 2017 **Run Report**

**Our Reports**

- Donations Performance
- Donations by Organisation
- Donations Received**

**Donations Received Report**

Individual Donations (Blue) | Org Matched Donations (Green)

Date	Payment Reference	Remittance Donor Details	Donations	Matching	Admin Costs	Total
09/2016	GOOD2GIV0000045AU	<a href="#">Download</a>	\$17.05	\$31.00	\$0.00	\$48.05
10/10/2016	GOOD2GIV0000046AU	<a href="#">Download</a>	\$46.05	\$30.00	\$0.00	\$76.05
10/11/2016	GOOD2GIV0000047AU	<a href="#">Download</a>	\$46.05	\$45.00	\$0.00	\$91.05
09/12/2016	GOOD2GIV0000048AU	<a href="#">Download</a>	\$16.05	\$30.00	\$0.00	\$46.05
11/01/2017	GOOD2GIV0000049AU	<a href="#">Download</a>	\$31.05	\$0.00	\$0.00	\$31.05
13/02/2017	GOOD2GIV0000050AU	<a href="#">Download</a>	\$46.05	\$75.00	\$0.00	\$121.05
10/03/2017	GOOD2GIV0000051AU	<a href="#">Download</a>	\$31.05	\$15.00	\$0.00	\$46.05
10/04/2017	GOOD2GIV0000052AU	<a href="#">Download</a>	\$31.05	\$0.00	\$0.00	\$31.05
10/05/2017	GOOD2GIV0000053AU	<a href="#">Download</a>	\$45.00	\$75.00	\$0.00	\$120.00
09/06/2017	GOOD2GIV0000055AU	<a href="#">Download</a>	\$30.00	\$15.00	\$0.00	\$45.00
10/07/2017	GOOD2GIV0000056AU	<a href="#">Download</a>	\$30.00	\$0.00	\$0.00	\$30.00

Employee Donations: \$369.40  
 Company Matching: \$316.00  
 Admin Costs: (\$0.00)

**Total Donations: \$685.40**

# Reports - Donations Received

1

## Report duration

Select the month/year from/to and click Run Report to display the report for the period required.

2

## Export

Once you have run the report, click Export to create a csv file version of the data.

3

## Total donations

Bar chart displays the total value of the donations, portion of employee (individual) donations and portion of company matching donations for the period selected.

4

## Donations payment received & donor details

Includes all payments that your organisation has received from Good2Give and a breakdown of those payments.

5

## Remittance reports

Remittance advice, including donor details, accompany each payout are included on the platform for you to download. Please ensure you've selected the correct filters for the months you want to report on.

# Charity communication process

## Create a message to donors

Follow these instructions to create a Thank You message to new donors and/or a Regular Update message to current donors.

All Charity Contacts with access to your Charity Giving Centre have the ability to create, edit, view and delete these messages.

### IMPORTANT:

1. The Message Short Description is an introduction to the main message that you upload as a pdf. It is in plain text, 150 characters in length and does not have hyperlink functionality.
2. Thank You messages will be received by new donors the first time they donate to your charity in Good2Give and by existing donors the first time they sign into Good2Give. Please take this into consideration in the wording of your thank you message.
3. Regular Update messages will be accessible by all donors on the Good2Give platform, that have a current donation with your charity. They will be notified in their profile, the moment the message is approved.
4. Each month we email donors when their donations are paid to their charities. We include a link to all approved messages from their selected charities in this email and take the donor back onto the Workplace Giving Platform to view them.

## Sign in to Good2Give and go to the Communications Page

For more on the Communications Page please refer to page 3.

1. Click on the New Message tab
2. Select the message type required from the drop down box: Thank You for new donors or Regular Update for current donors
3. Enter the Message Title that will appear as the heading of the message summary in the Employee Giving Centre for your donors (maximum 80 characters)
4. Enter the Message Short Description that will appear as the message summary in the Employee Giving Centre for your donors (maximum 150 characters)
5. Click Browse to select and upload your message
6. Click Save & Submit to save your message and send to the Good2Give team to approve or suggest edits. If you are still working on your message, click Save as Draft to save it as a draft.

# Charity communication process

## IMPORTANT:

- 1. Message Approved:** Your message is now live and will appear as Active on the Communications Page in the Charity Giving Centre. Thank You messages will appear in the Employee Giving Centre of new donors once the donation is confirmed by the employee. Regular Update messages will appear in the Employee Giving Centre of all current donors.
- 2. Message Not Approved:** If your message requires review and editing before being approved, the Good2Give Team will send you an email within 2 working days. If editing is required:

## Sign in to Good2Give and go to the Communications Page

For more on the Communications Page please refer to page 3.

1. Click on the Pending tab
2. Click on the Message Title that requires updating (you will see an 'Edit Requested' notification)
3. Scroll to the bottom of your message to the History section to read the Edit Requested Admin reason the message was not approved
4. Make the changes as requested to your message
5. Click Save to save your message and display the PDF you have attached
6. Click Send to email your message to the Good2Give Team for approval

## Communication content guidelines

Donors are keen to know how their workplace giving donations have been used and the impact their donations have had on your organisation. Through our Communications functionality, you can create a positive experience for donors using this platform.

Please ensure that no links to outside donation requests are included in your donor communication so as to ensure you comply with Section 5 a) in the Terms and Conditions of Use document:



*The Charity shall not store, distribute or transmit any material on or via the Platform that is unlawful, harmful, threatening, defamatory, obscene, infringing, harassing or racially or ethnically offensive; facilitates illegal activity; depicts sexually explicit images; or promotes unlawful violence, discrimination based on race, gender, colour, religious belief, sexual orientation, disability, or any other illegal activities.*

# Charity payment process

## Individual donations and company matched donations

Good2Give's Workplace Giving Administration Team receives funds during the calendar month from organisations for both individual donations and company matched donations.

These donations are processed during the first week of the following calendar month, with funds distributed to charities from about the 10th of every month.

## Charity payment confirmation email and CSV file

On the date the funds are transferred into your charity bank account, you will receive a system generated email advising the funds that were received and processed in the previous calendar month have been transferred. These funds may include individual donations and company matching from other periods if they were not processed until this same period. To view your remittance advice you will have to log into your account and download from the reports tab.

Example Charity Funds Processed.CSV

Charity Name	Lodgement Reference	Payment Date	Donation Period																	
XYZ Charity	GOOD2GIV00000000AU	10/05/2017	04/02/2017-13/05/2017																	
Donation Date	Good2Give Donor Id	Donor Firstname	Donor Lastname	Donor Email	Employer Name	Donation Type	Charity Project	Donor Reference	Donation Amount											
4/02/2017	000	Joe	Blob		XYZ Company	Employer Matched	General		\$15.00											
18/02/2017	000	Joe	Blob		XYZ Company	Employer Matched	General		\$15.00											
4/03/2017	000	Joe	Blob		XYZ Company	Employer Matched	General		\$15.00											
18/03/2017	000	Joe	Blob		XYZ Company	Employer Matched	General		\$15.00											
1/04/2017	000	Joe	Blob		XYZ Company	Employer Matched	General		\$15.00											
15/04/2017	000	Joe	Blob		XYZ Company	Workplace Giving	General		\$15.00											
29/04/2017	000	Joe	Blob		XYZ Company	Workplace Giving	General		\$15.00											
13/05/2017	000	Joe	Blob		XYZ Company	Workplace Giving	General		\$15.00											
Total Remitted	120																			

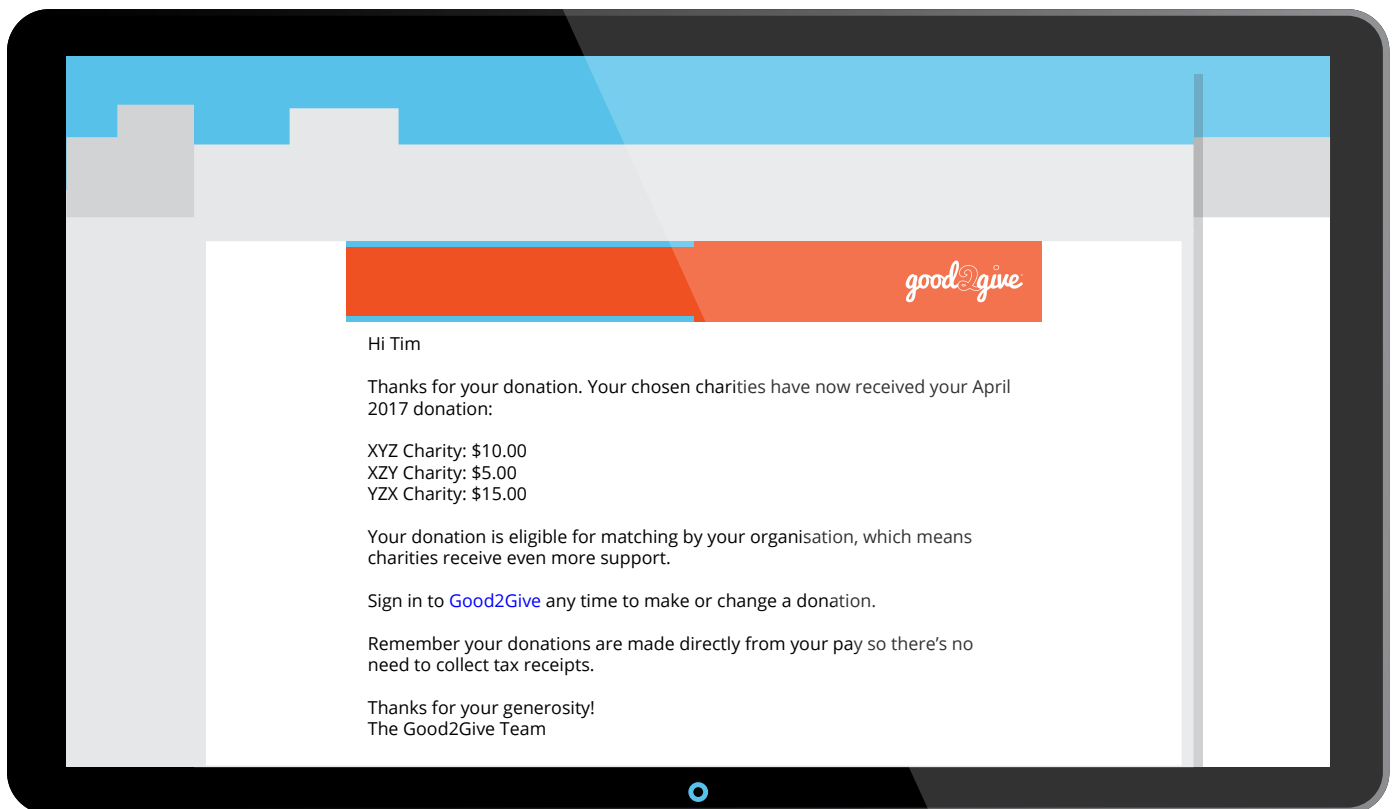


It is not necessary for you to receipt the individual donors as all pre-tax donations made through workplace giving are recorded on their payslips. At financial year end, the total donation amounts will be listed on the PAYG statements issued by their employers.

# Donor payment confirmation and charity updates

On the date the charity payment is made, all donors including those who wish to remain anonymous to the charity, receive a system generated email thanking them for the donation and confirming it has been received by the charity.

The email sent to Employees using the Employee Giving Centre also includes 'News from your charities' featuring any communication updates from all charities the donor supports that were received and approved by Good2Give during the previous calendar month:



## Charity records updated in the Charity Giving Centre

On the date the charity payment confirmation email is sent, your records are automatically updated in the Charity Giving Centre to show this latest donation information.

## How do donors find me?

Donors are able to find your organisation within the Employee Giving Centre in a number of different ways. Donors are able to:

- Search for your charity and/or project by name
- Find your charity by keyword
- Find your charity by Cause Area
- Find your charity in a randomly generated group of big and small charities. The size of a charity is determined by data taken from the Australian Charities and Not-for-profits Commission (ACNC). Any charity with revenue under \$250,000 is classified 'Small'. Any charity with revenue over \$250,000 is classified 'Big'.
- Search for charities that are 'Trending' within their organisation. Charities become trending within an organisation based on the percentage increase of donors from the previous month. Factors that may affect this include fundraising events, crisis appeals or whether your charity is supported by a particular client.



## Enquiries

For all Workplace Giving support enquiries  
please contact

E [charity@good2give.ngo](mailto:charity@good2give.ngo)  
P 02 9929 9633