

Quickstart: Charities

- Projects

investorsincommunity.org



Ordinary people
doing extraordinary things.

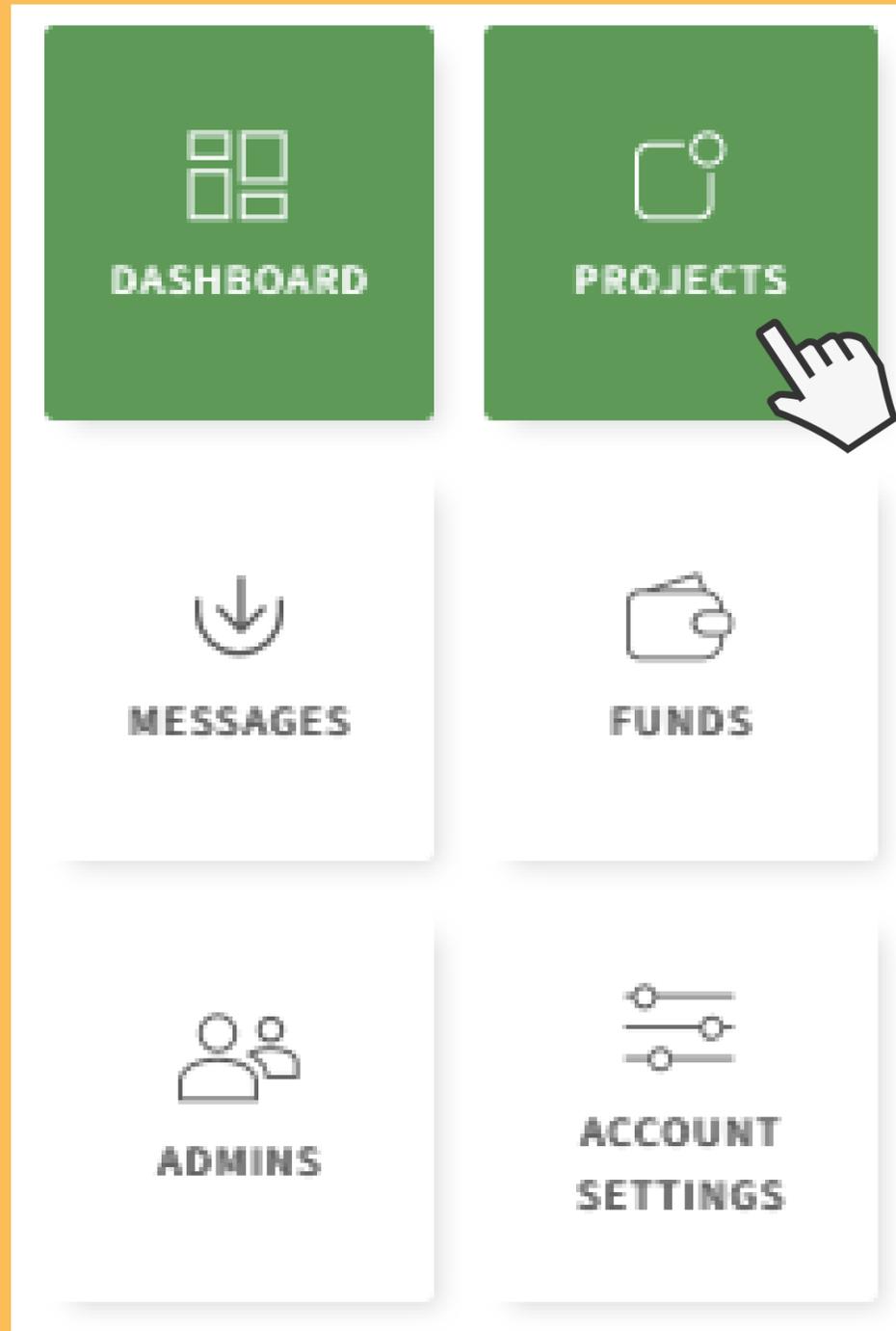
Firstly, ensure you are in your charity profile. Do this by selecting switch profile and clicking on your charity profile.

The screenshot shows the 'INVESTORS IN COMMUNITY' website interface. At the top, there is a navigation bar with 'Home', 'Explore', and 'About Us' links. The user profile 'jfklsdjlkds' is visible on the left, with a 'View Public Profile' link. A 'Switch Profile' button is highlighted in the top right corner, with a dropdown menu showing options: 'jfklsdjlkds's Profile', 'IIC Business's Profile', and 'Personal Profile'. The main content area is divided into several sections:

- Project Donations:** A table with columns for 'NAME', 'PROJECT', 'DATE', 'DONATION', and 'ALL'. It includes a 'FUNDS' tab and pagination controls.
- Direct Donations:** A table with columns for 'NAME', 'DATE', 'DONATION', and 'ALL'. It includes a 'FUNDS' tab and pagination controls.
- Project Requests:** A table with columns for 'NAME' and 'CREATED PROJECT'. It includes 'REJECT' and 'ACCEPT' buttons and pagination controls.
- Expired Projects:** A table with columns for 'CHARITY', 'PROJECT', and 'END DATE'. It includes pagination controls.

A sidebar on the left contains navigation icons for 'DASHBOARD', 'PROJECTS', 'MESSAGES', 'FUNDS', 'ADMINS', and 'ACCOUNT SETTINGS'.

Now click projects from the sidebar.



You will then see this page, please click create project.

The screenshot displays a project management interface with the following elements:

- Filters:** A row of tabs at the top: ALL (highlighted), ACTIVE, COMPLETED, FINISHED, DRAFTS, and ASSOCIATED.
- Search Bar:** A text input field on the left containing the placeholder text "SEARCH PROJECTS".
- Create Project Button:** A green button labeled "CREATE PROJECT" on the right, with a hand cursor icon pointing to it.
- Table Header:** A grey header row for a table with columns: PROJECT NAME, TYPE OF GIVING, DATES, STATUS, and ACTIONS.
- Page Navigation:** At the bottom left, there are three circular icons: a left arrow, a green circle containing the number "1", and a right arrow.

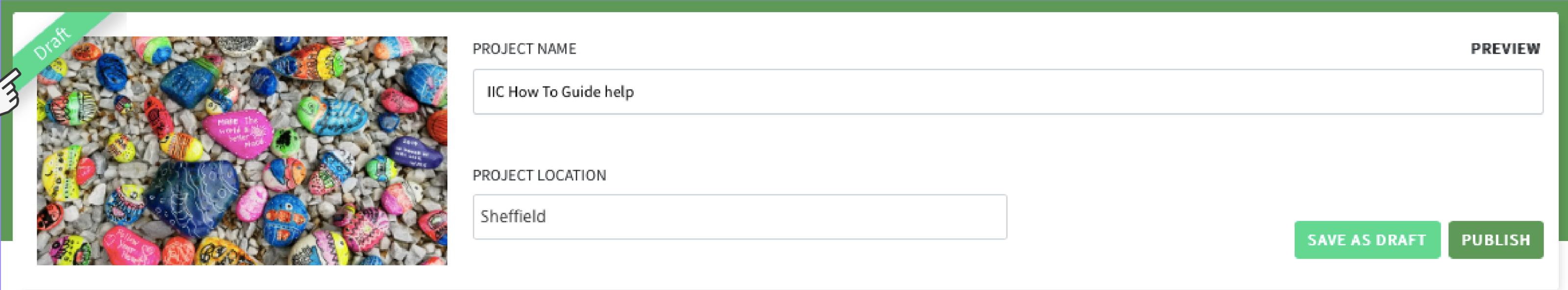
You will now fill out the details of your project, we have attached a few tips at the end of this document to help you make the best project possible!

Once you have filled out all the details please save as draft, we encourage you to check all the details over to be sure everything is correct as once you have published your project you will not be able to change it!

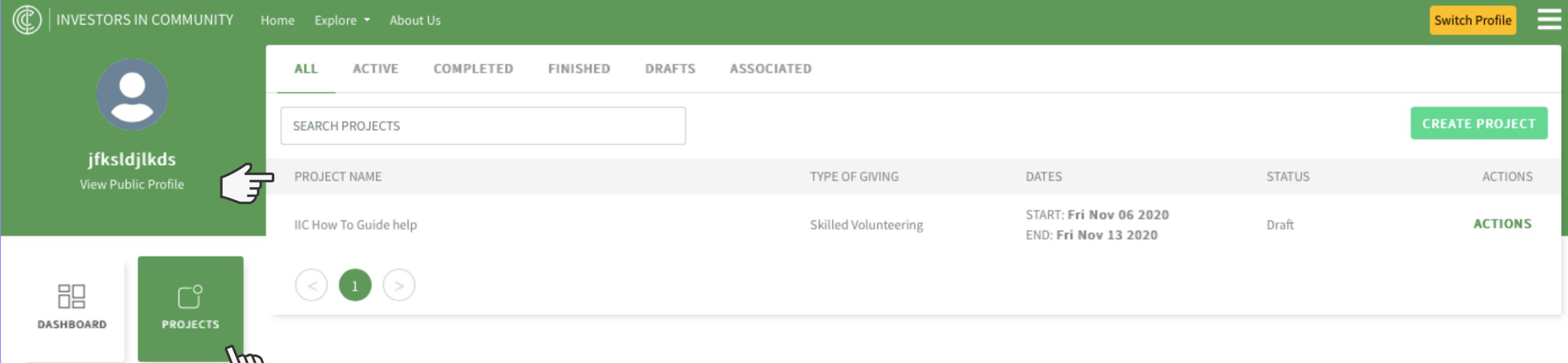
Also, be sure to save as draft a few times whilst making your project as the session will timeout after some time of inactivity.

The screenshot shows a web form for creating a project. At the top left, there is a green banner with the word "Draft" in white. Below this, a grey box contains the text "Choose an image from your computer" and "JPEG, PNG / 10MB file limit". To the right of this box are two input fields: "PROJECT NAME" and "PROJECT LOCATION". A green "SAVE AS DRAFT" button is located in the top right corner of the form. Below these fields is a section titled "GENERAL INFORMATION". Under "PROJECT DATES", there are two date pickers: "Start Date" (06/11/2020) and "End Date" (13/11/2020). Below that is a "CHOOSE TYPE OF GIVING" dropdown menu with "Type of Giving" selected. A button labeled "ADD ANOTHER TYPE OF GIVING" is positioned below the dropdown. Further down, there are three columns: "CHOOSE CATEGORY" with a "--Select--" dropdown, "IMAGES" with an "ADD IMAGES" button and "JPEG, PNG / 10MB file limit" text, and "DOCUMENTATION" with an "ADD DOCUMENTS" button. At the bottom of the form is a large text area labeled "DESCRIPTION". A second green "SAVE AS DRAFT" button is located at the bottom right of the form, with a hand cursor icon pointing to it.

After saving as draft your page will refresh and show a draft icon in the top left corner. If you would like to come back to your project later all you have to do is click on the projects tab in the sidebar to view all your projects.



This screenshot shows a project edit form. On the left is a preview image of colorful painted rocks, with a green 'Draft' banner in the top-left corner and a hand cursor pointing to it. The form fields are: 'PROJECT NAME' with the value 'IIC How To Guide help', and 'PROJECT LOCATION' with the value 'Sheffield'. On the right side of the form are two buttons: 'SAVE AS DRAFT' and 'PUBLISH'. The word 'PREVIEW' is visible in the top right corner of the form area.



This screenshot shows the 'Investors in Community' dashboard. The top navigation bar includes the logo, 'INVESTORS IN COMMUNITY', and links for 'Home', 'Explore', and 'About Us'. A 'Switch Profile' button and a menu icon are in the top right. The main content area features a sidebar on the left with a user profile for 'jfklsldjlkds' and a 'View Public Profile' link. Below the profile are two buttons: 'DASHBOARD' and 'PROJECTS', with a hand cursor pointing to 'PROJECTS'. The main area has tabs for 'ALL', 'ACTIVE', 'COMPLETED', 'FINISHED', 'DRAFTS', and 'ASSOCIATED'. A search bar labeled 'SEARCH PROJECTS' and a 'CREATE PROJECT' button are present. Below is a table with the following data:

PROJECT NAME	TYPE OF GIVING	DATES	STATUS	ACTIONS
IIC How To Guide help	Skilled Volunteering	START: Fri Nov 06 2020 END: Fri Nov 13 2020	Draft	ACTIONS

At the bottom of the table, there are navigation arrows and a page number '1'.

Once you are happy with your project, please click publish, if something flashes red that means you need to fill in those details for your project to be published.

Draft



PROJECT NAME **PREVIEW**

IIC How To Guide help

PROJECT LOCATION

Sheffield

SAVE AS DRAFT **PUBLISH**



DESCRIPTION

[Empty text area for project description]

After publishing, your live project will now be on our explore page under projects.

The screenshot shows the 'INVESTORS IN COMMUNITY' website. The navigation bar includes 'Home', 'Explore', and 'About Us'. A search bar is on the left, and a 'Switch Profile' button is on the right. A dropdown menu is open over the 'Explore' link, showing 'Projects', 'Charities / Good Causes', and 'Groups'. Below the navigation, there are three project cards. The first card is for 'Save The Childfren' by Ross Charity, categorized as 'Volunteering', with a deadline of Feb 10, 2021. The second card is for 'VCCF20 TES Christmas Party' by CHILDRE CHARITY, categorized as 'Funds', with a deadline of Dec 31, 2020. The third card is for 'IIC How To Guide help' by jfkldjlkds, categorized as 'Skilled Volunteering', with a deadline of Nov 19, 2020. At the bottom, there are navigation arrows and a page number '1'.

You will be able to see all your live/completed/draft projects in the projects section of your charity profile.

In this section you will also see actions, the next few pages will discuss what actions means.

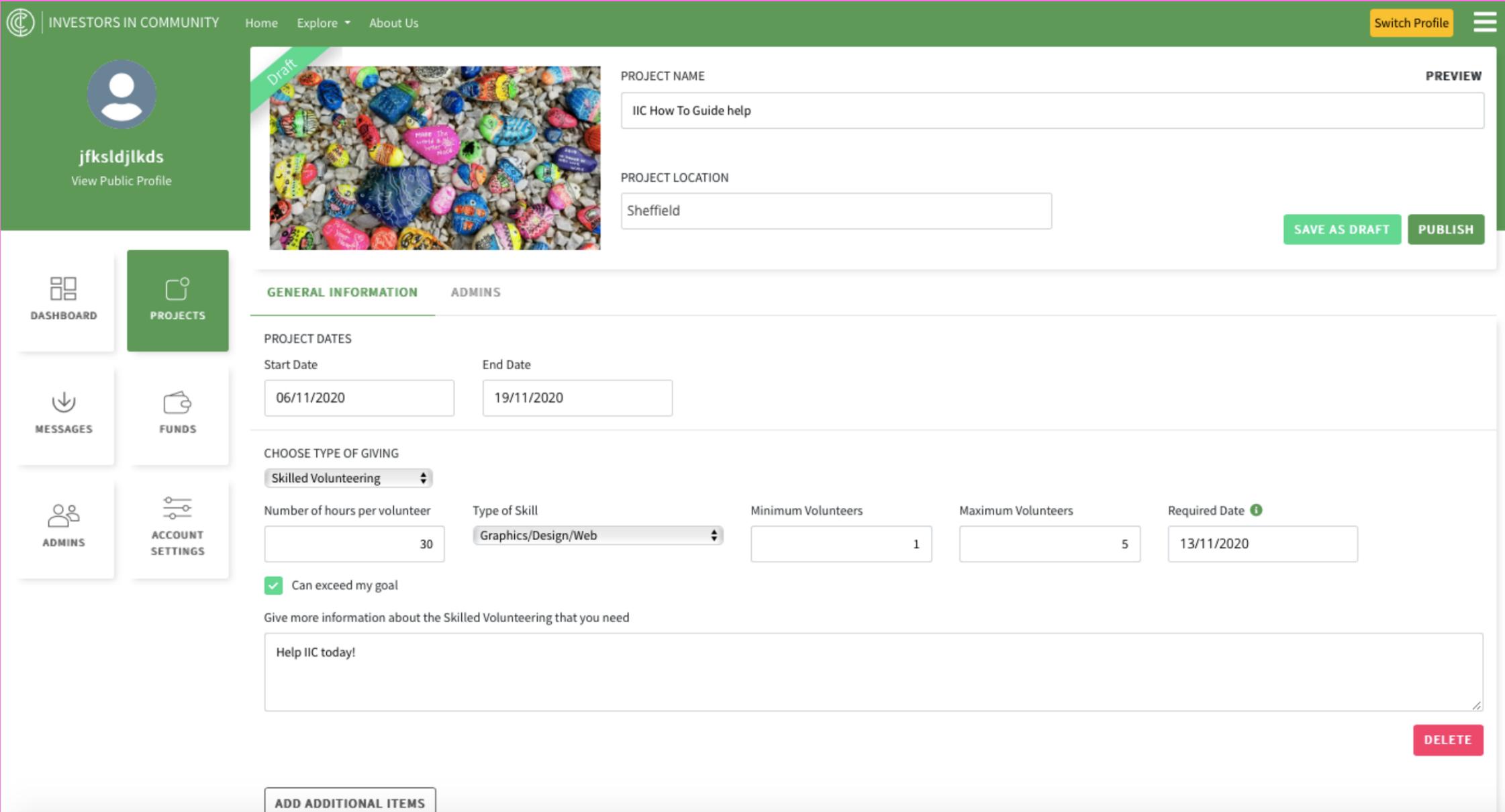
The screenshot shows the 'Investors in Community' website interface. At the top, there is a navigation bar with the logo, 'INVESTORS IN COMMUNITY', and links for 'Home', 'Explore', and 'About Us'. A 'Switch Profile' button and a menu icon are on the right. On the left, a user profile for 'jfklsdjkds' is displayed with a 'View Public Profile' link. Below the profile are two buttons: 'DASHBOARD' and 'PROJECTS'. The main content area features a filter menu with tabs for 'ALL', 'ACTIVE', 'COMPLETED', 'FINISHED', 'DRAFTS', and 'ASSOCIATED'. A search bar labeled 'SEARCH PROJECTS' and a 'CREATE PROJECT' button are also present. A table lists projects with columns for 'PROJECT NAME', 'TYPE OF GIVING', 'DATES', 'STATUS', and 'ACTIONS'. One project is listed: 'IIC How To Guide help' with 'Skilled Volunteering' as the type of giving, dates from 'Fri Nov 06 2020' to 'Thu Nov 19 2020', and a status of 'Live'. A hand icon points to the 'ACTIONS' link for this project. At the bottom of the table, there are navigation arrows and a page number '1'.

PROJECT NAME	TYPE OF GIVING	DATES	STATUS	ACTIONS
IIC How To Guide help	Skilled Volunteering	START: Fri Nov 06 2020 END: Thu Nov 19 2020	Live	 ACTIONS

Clone - if you see your project is doing well and you wish to clone it. You should click clone on the actions dropdown menu. This will take you to the create a project page but this time it will be pre-filled, please select what you would like to alter from your previous project such as the date, image, amount, type of giving etc and then click publish. Once again this project will appear in the explore section.

ACTIONS

- Edit
- Cancel
- Clone
- Complete
- Extend
- Message



INVESTORS IN COMMUNITY | Home | Explore | About Us | Switch Profile

PROJECT NAME IIC How To Guide help **PREVIEW**

PROJECT LOCATION Sheffield **SAVE AS DRAFT** **PUBLISH**

GENERAL INFORMATION **ADMINS**

PROJECT DATES
Start Date: 06/11/2020 | End Date: 19/11/2020

CHOOSE TYPE OF GIVING
Skilled Volunteering

Number of hours per volunteer: 30 | Type of Skill: Graphics/Design/Web | Minimum Volunteers: 1 | Maximum Volunteers: 5 | Required Date: 13/11/2020

Can exceed my goal

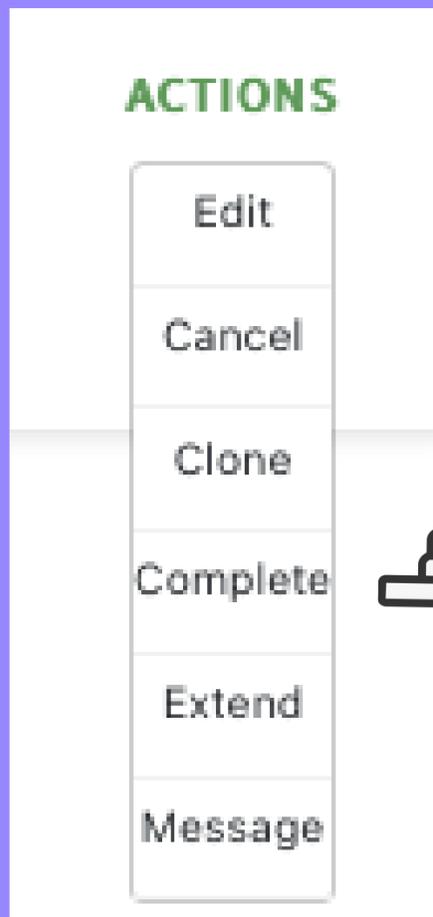
Give more information about the Skilled Volunteering that you need

Help IIC today!

DELETE

ADD ADDITIONAL ITEMS

Complete - when you have received all your funds/gifts/volunteers and you are happy to complete the project, please click complete on the actions dropdown menu. Then add your comments on how the project performed and click complete.



Project Summary [X]

Project Name
IIC How To Guide help

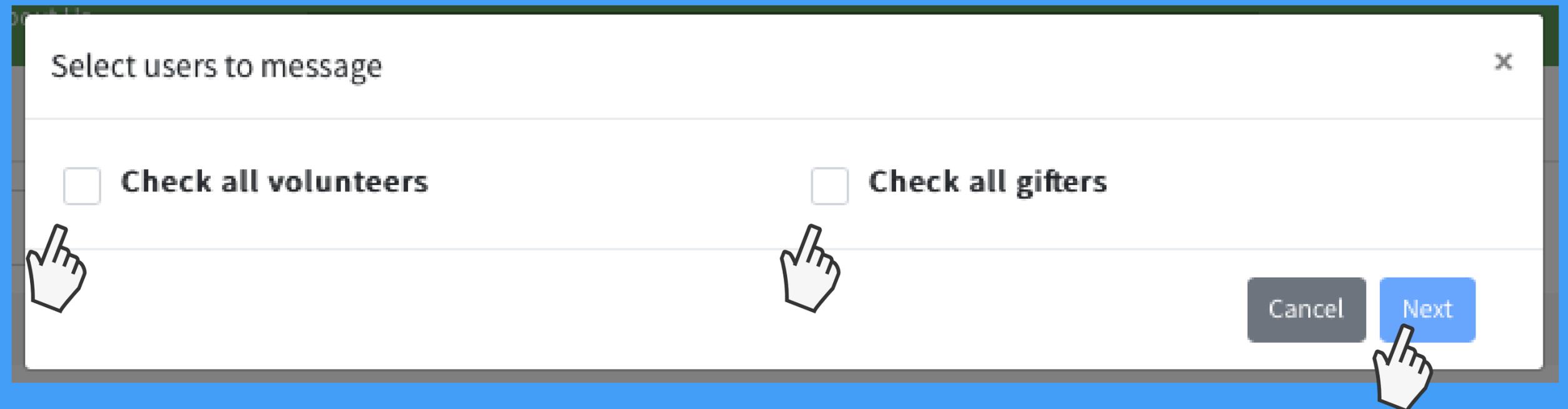
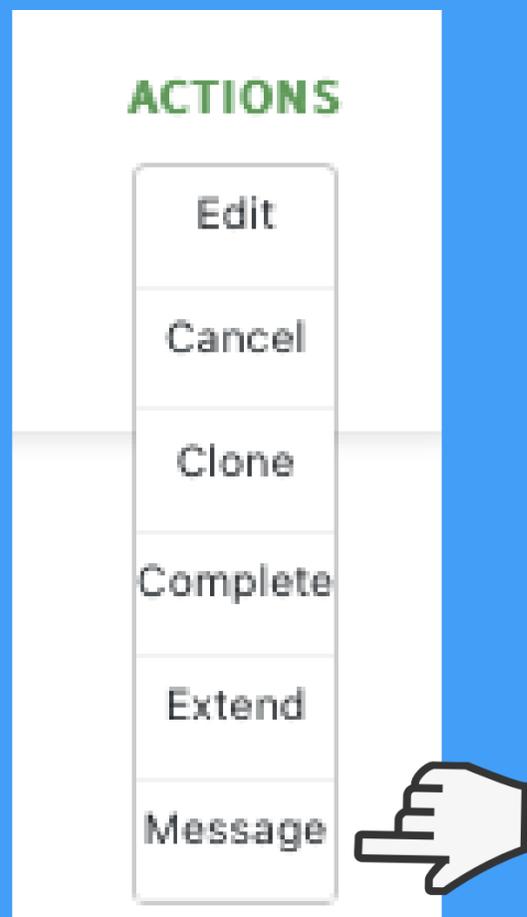
Start Date: Nov 6, 2020 Date Completed: Nov 6, 2020

Skilled Volunteering Confirmation

NAME	SKILLS	DATES	TIME OFFERED	ACTUAL TIME
< 1 >				
People Volunteered: 0			Hours Volunteered: 0 h	
Add Comments				
<input type="text"/>				
				[CANCEL] [COMPLETE]

Note: The completion day does not have to be the date you originally put on the project, you can complete early if you have received enough fund/gifts/volunteers.

Message - If you would like to send a message to your project gifters/volunteers (messaging to funders is not available) then click message from the actions dropdown menu, choose who you would like to message for this specific project and click next. You can only message on live / active projects – if a project is finished, you will no longer be able to message. Once a message is sent, you can check responses in the message button.



Tip - Make sure you have accepted all offers of volunteering and gifting from the dashboard to make sure that you are messaging to all updated people!

Extend - to extend your project, please click extend from the actions dropdown menu, then add the date you would like to extend to and click extend.

ACTIONS

- Edit
- Cancel
- Clone
- Complete
- Extend
- Message



Extend Project End Date ✕

Project End Date

19/11/2020



Close Extend



Thanks for reading!

Please get in touch if you have more questions.

Contact: tracey.oley-jones@investorsincommunity.org

investorsincommunity.org



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