Quickstart: Businesses - Projects
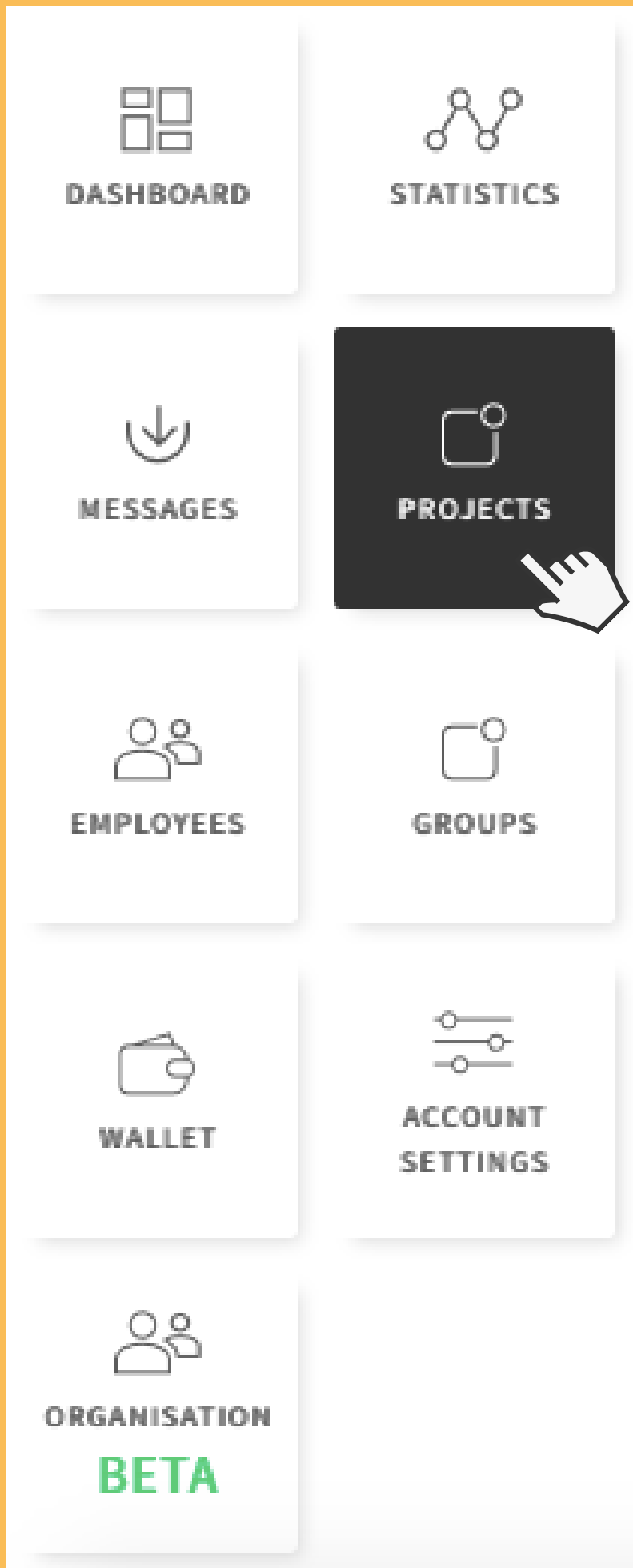
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Firstly, ensure you are in your business profile. Do this by selecting switch profile and clicking on your business profile.

Click projects from the side menu.

DASHBOARD

STATISTICS

MESSAGES

PROJECTS

EMPLOYEES

GROUPS

WALLET

ACCOUNT SETTINGS

ORGANISATION
BETA
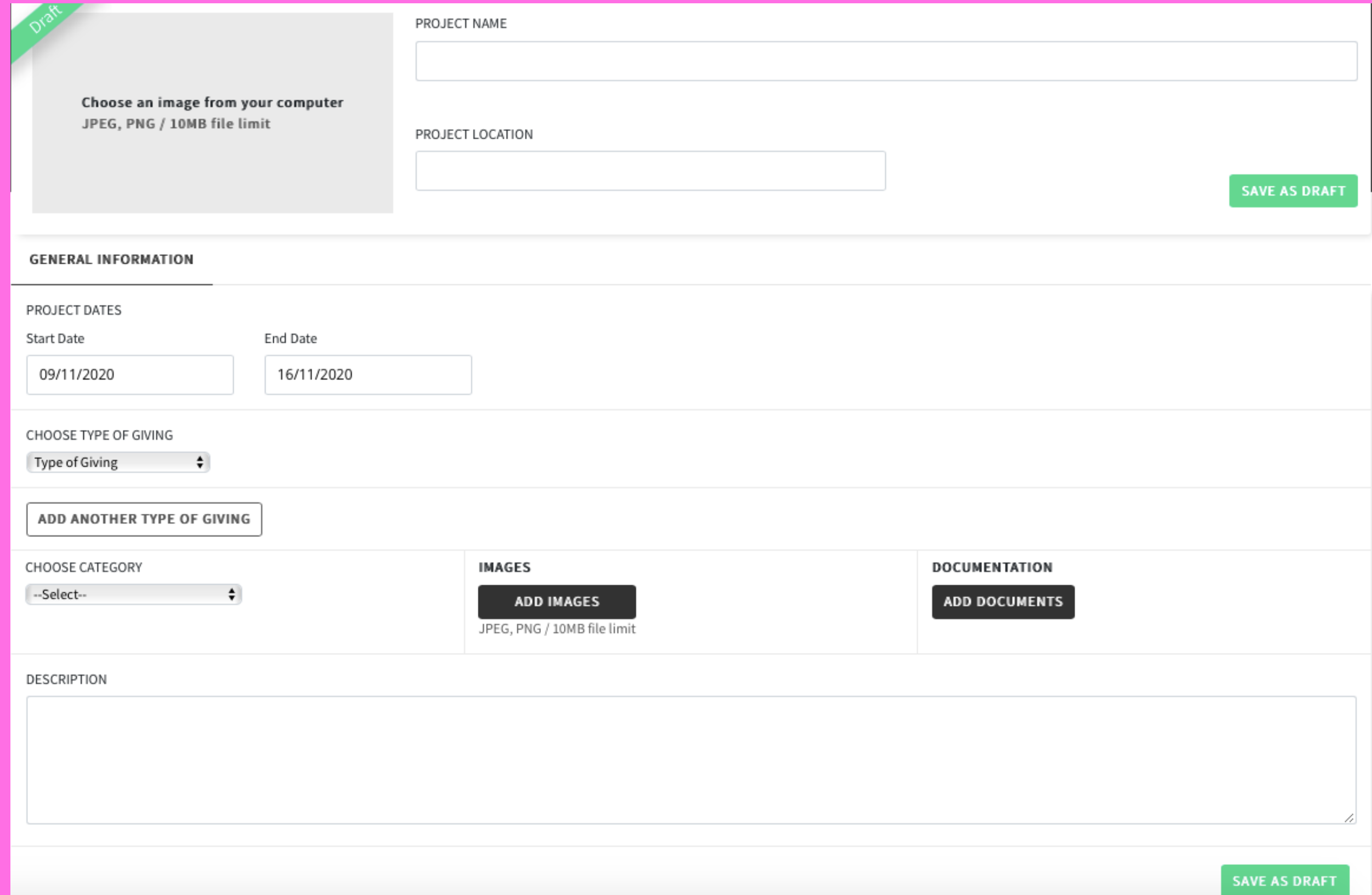
After clicking on projects you should see the screen below. Now click create project.

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.

Draft

Choose an image from your computer
JPEG, PNG / 10MB file limit

PROJECT NAME

PROJECT LOCATION

SAVE AS DRAFT

GENERAL INFORMATION

PROJECT DATES

Start Date
09/11/2020

End Date
16/11/2020

CHOOSE TYPE OF GIVING

Type of Giving

ADD ANOTHER TYPE OF GIVING

CHOOSE CATEGORY

--Select--

IMAGES

ADD IMAGES

JPEG, PNG / 10MB file limit

DOCUMENTATION

ADD DOCUMENTS

DESCRIPTION

SAVE AS DRAFT

Tip: once you have saved as draft you can exit the project and come back to it later if you wish, it will be waiting for you in the project section of your business profile.

You will now see an associate charity tab, please fill in what charity you would like to associate and then select it from the dropdown menu. Once you've done this please click associate charity and then publish.

ADD ANOTHER TYPE OF GIVING

CHOOSE CATEGORY

IMAGES

ADD IMAGES

JPEG, PNG / 10MB file limit

DOCUMENTATION

ADD DOCUMENTS

DESCRIPTION

Business project!

✓ Exceeded Funds would be spent on something relevant to the project description

SELECT CHARITY TO ASSOCIATE

SAVE AS DRAFT   ASSOCIATE CHARITY

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

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

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

| ALL | ACTIVE | COMPLETED | FINISHED | DRAFTS |

SEARCH PROJECTS   CREATE PROJECT

PROJECT NAME	TYPE OF GIVING	DATES	STATUS	STAGE	ACTIONS
Business project	Funds	START: **Mon Nov 09 2020** END: **Fri Nov 20 2020**	Draft	New	👉 **ACTIONS**

< **1** >

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. You should also associate your charity once again.

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.

ACTIONS

- Edit
- Cancel
- Clone
- Complete
- Extend
- Message
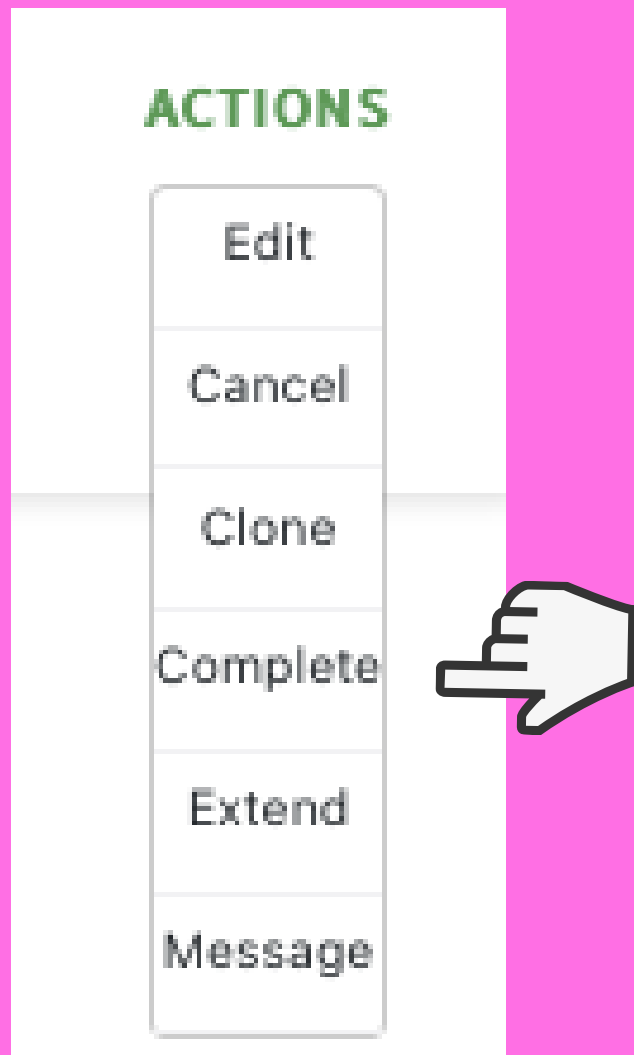
Project Summary ✕

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

CANCEL   COMPLETE

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.

Select users to message ✕

Check all volunteers   Check all gifters

Cancel   Next

ACTIONS

Edit

Cancel

Clone

Complete
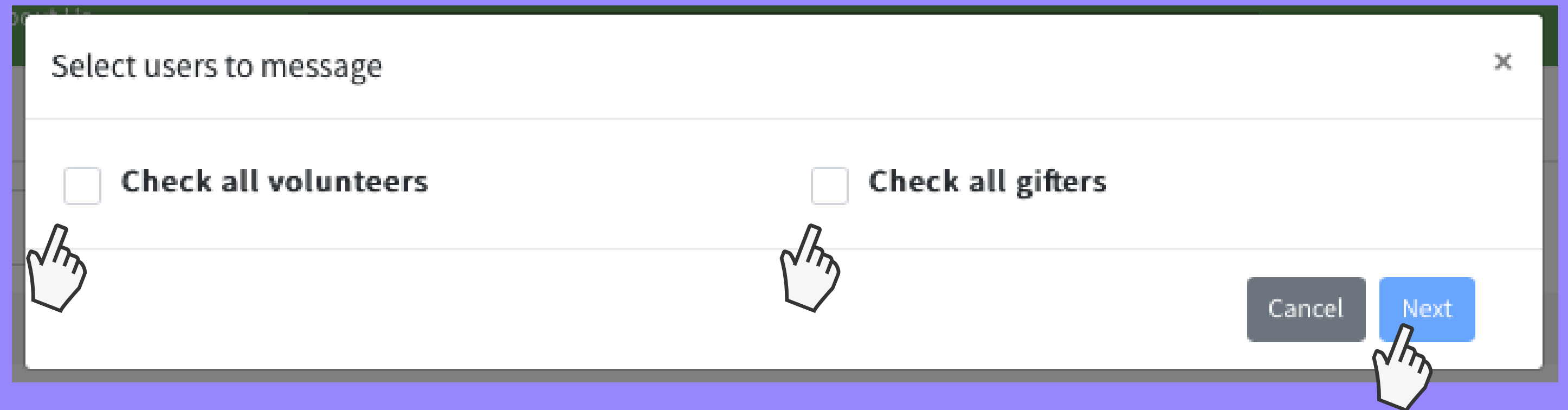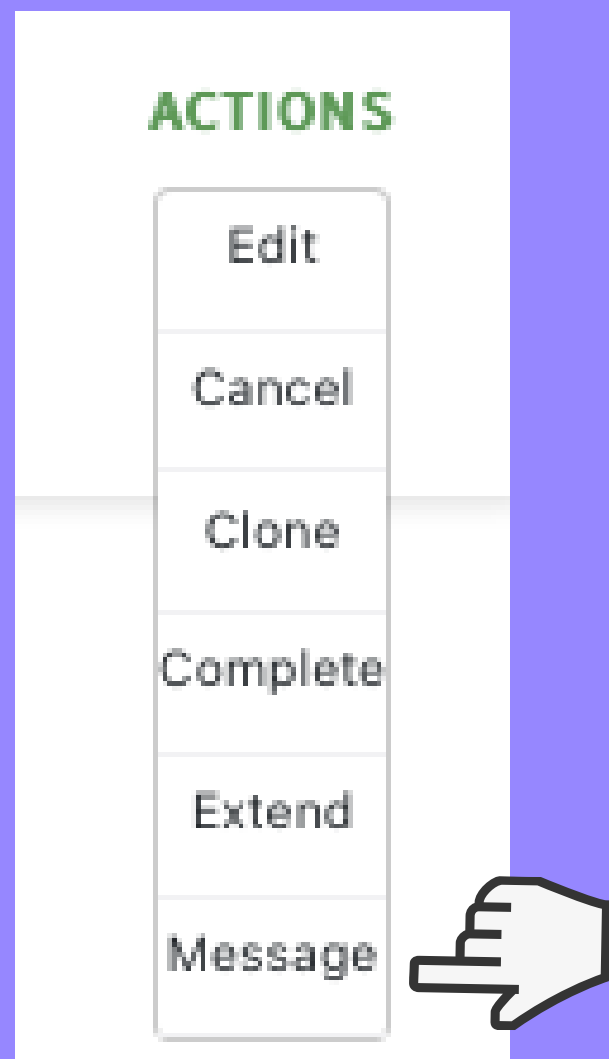
Extend

Message

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

Tips and Tricks!

- Always set your minimum target to £1 so if you don't achieve your goal you will still receive the amount you have been donated
- Don't ask for millions – start small and build an audience! We recommend anything under £500
- Don't mix types of giving unless really necessary as this makes a project look cluttered, make multiple projects
- Do be friendly and engaging in the project to encourage people to donate/gift/volunteer
- Do put a good photo up, a clear, eye catching and colourful image is always best
- Tick the box that says the project can exceed your goal, this means if you ask for £250 and you receive £300 you are welcome to keep those donations

It is important to remember you are running the project, don't just create it and then forget it exists! Share it on your social media, send it to your contacts and employees, get as many people seeing it as possible, we find these are the projects that suceed the most on Investors In Community.

Thanks for reading!

Please get in touch if you have more questions.

Contact: ross.shipman@investorsincommunity.org

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Quickstart: Businesses - Creating Groups.

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

Then click on the groups in the side bar.

Click create group and then choose which account you want the group to be part of (personal account or a business account) after doing this, click next.

Choose if you want to have individuals or businesses invited to the group then click next.

Choose Account   ✕

Who can be a member of your group?

⦿ Individuals

◯ Business

NEXT

Input the group name and description, and select whether its hidden or public then click next.

Add group details ✕

Group Name

Group Description

⦿ Visible
Anyone can find this group via the explore groups page.
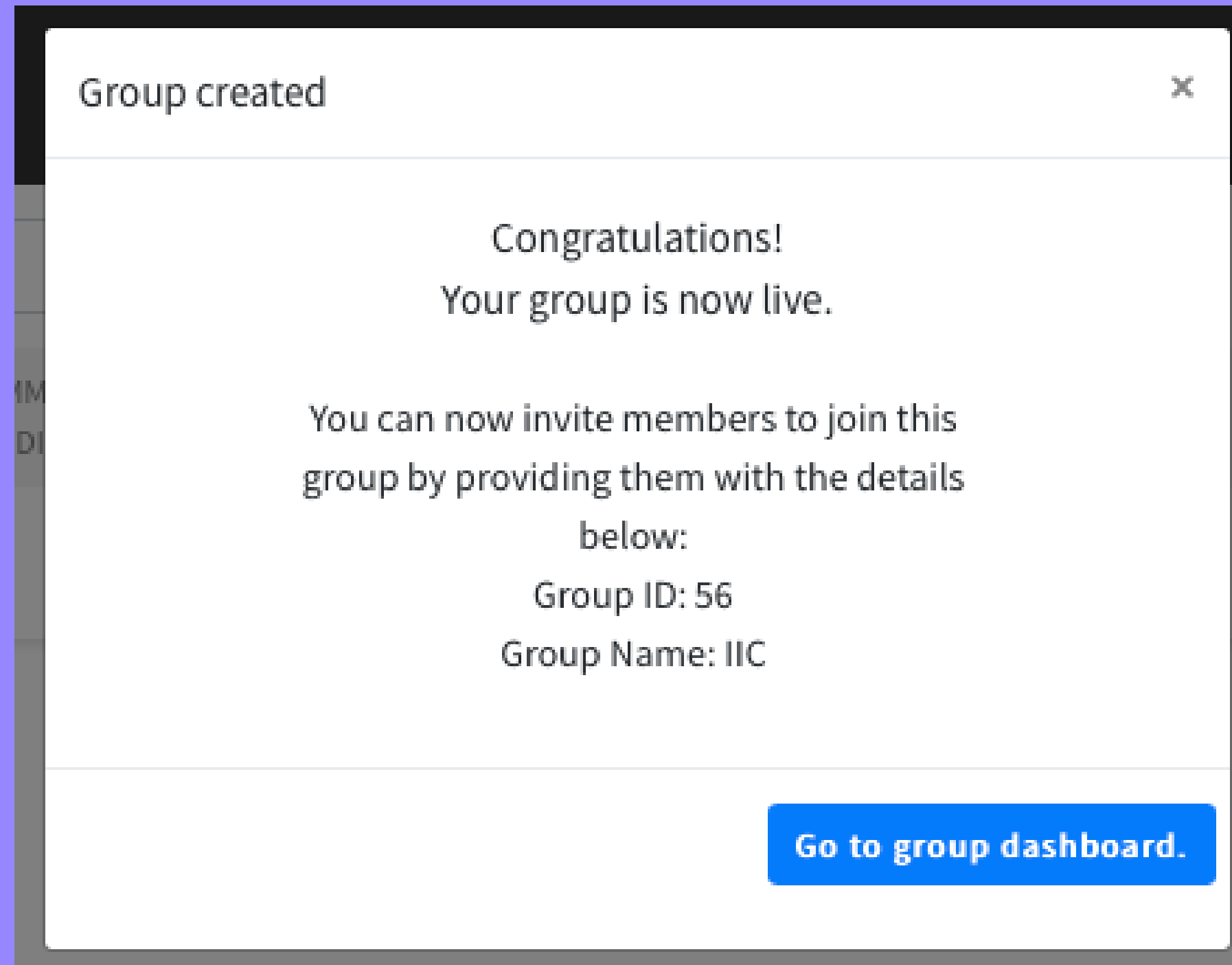Anyone can join this group.

◯ Hidden
This group will not be visible on the explore groups page.
Members can join this group with the Group ID number and
Group Access Code.

👉 Learn more about group privacy

Read the difference between the types
of groups be clicking on 'learn more
about group privacy'

👉 **NEXT**

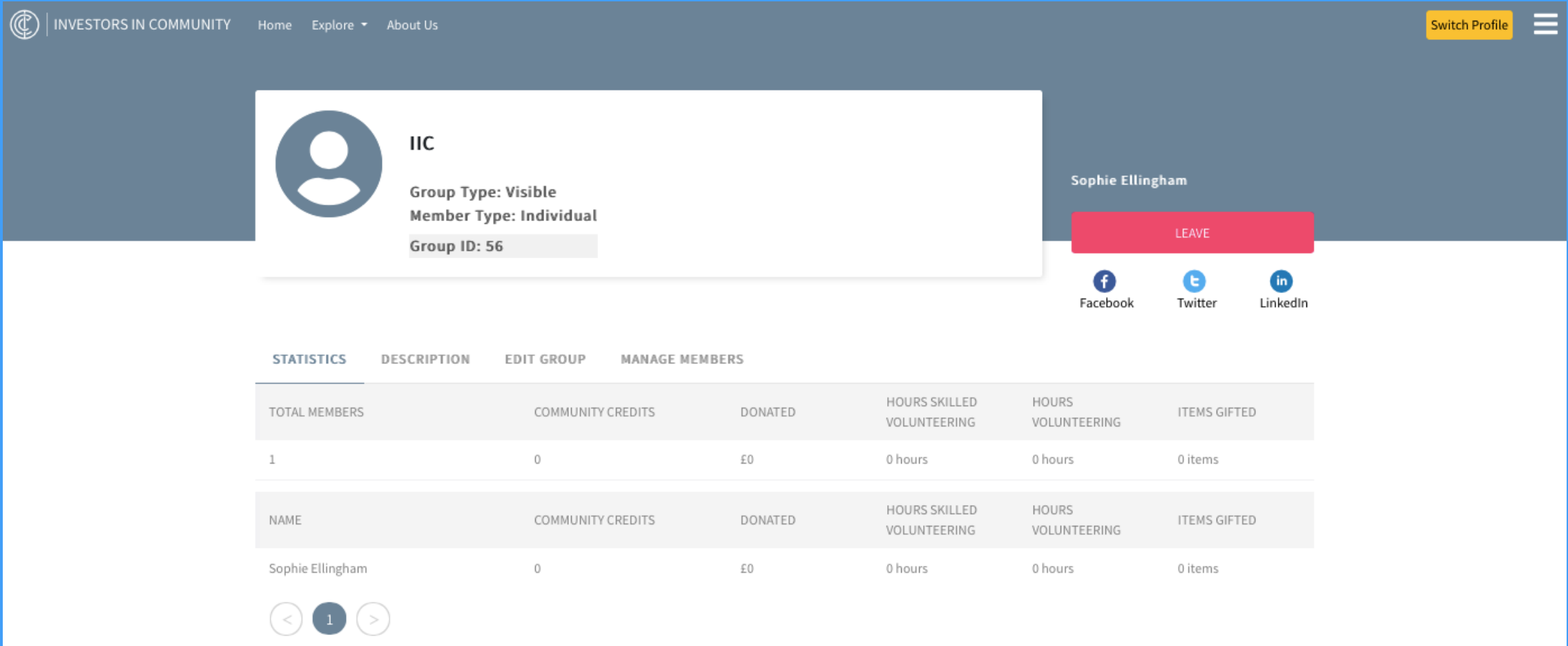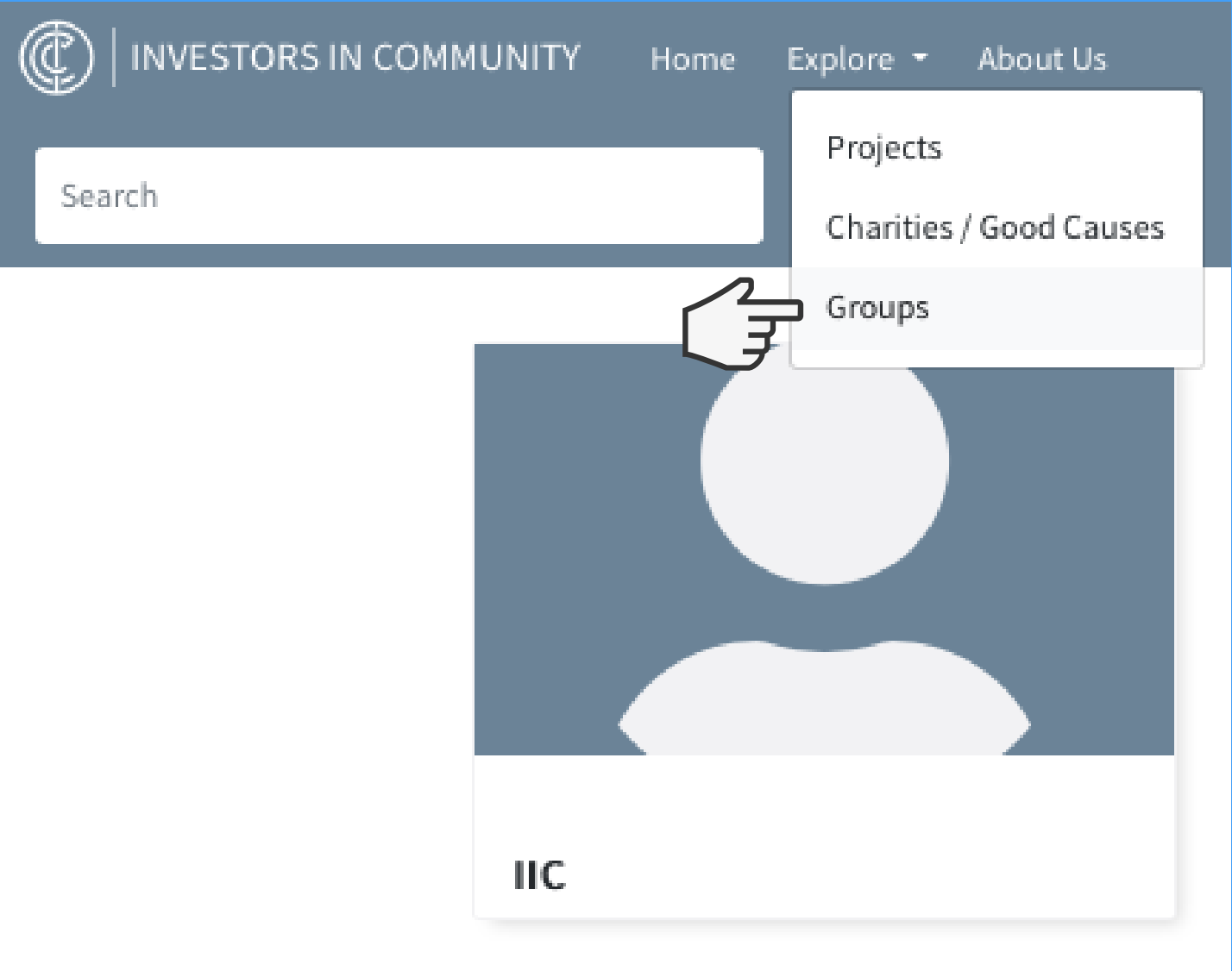After clicking next your group will be created.

Group created ✕

Congratulations!
Your group is now live.

You can now invite members to join this
group by providing them with the details
below:
Group ID: 56
Group Name: IIC

Go to group dashboard.

If you chose public, the group will now display in the group section of the 'Explore' tab at the top of your screen. Both groups can be managed from within the 'Groups' tab of the profile it is associated with.

Thanks for reading!

Please get in touch if you have more questions.

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