

# GETTING STARTED

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HOW TO SET UP YOUR BUSINESS PROFILE, ONBOARD EMPLOYEES,  
JOIN GROUPS, LOAD THE WALLET, AND CREATE PROJECTS



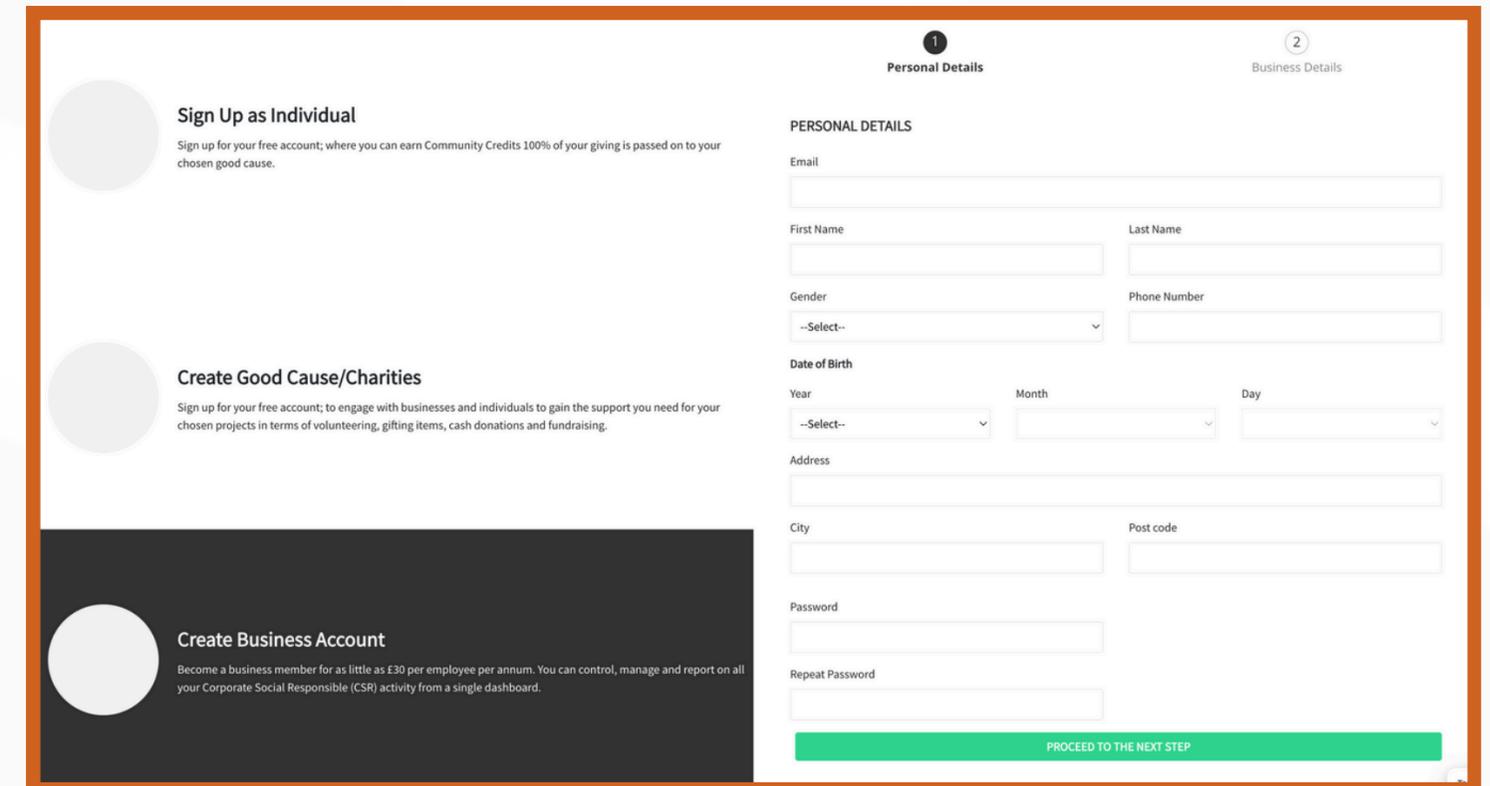
INVESTORS IN  
COMMUNITY

# SETTING UP

 Head to <https://investorsincommunity.org/>

 Click register in the top right.

 Select create business account, fill in your personal details, and proceed to the next step.\*



**1 Personal Details** **2 Business Details**

**Sign Up as Individual**  
Sign up for your free account; where you can earn Community Credits 100% of your giving is passed on to your chosen good cause.

**PERSONAL DETAILS**

Email

First Name  Last Name

Gender  Phone Number

Date of Birth

Year  Month  Day

Address

City  Post code

City  Post code

Password

Repeat Password

**PROCEED TO THE NEXT STEP**

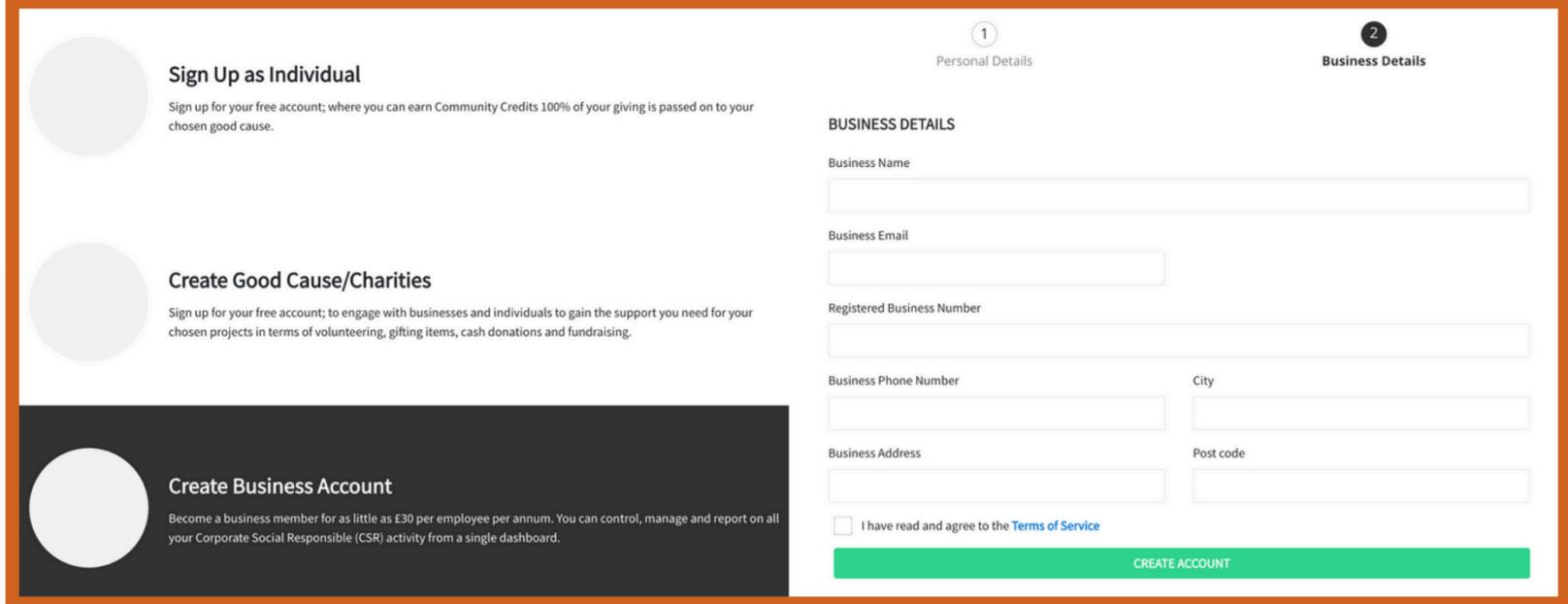
**Create Good Cause/Charities**  
Sign up for your free account; to engage with businesses and individuals to gain the support you need for your chosen projects in terms of volunteering, gifting items, cash donations and fundraising.

**Create Business Account**  
Become a business member for as little as £30 per employee per annum. You can control, manage and report on all your Corporate Social Responsible (CSR) activity from a single dashboard.

\*IF YOU FACE DIFFICULTIES, TYPE OUT THE LOCATION FIELDS, RATHER THAN LETTING IT AUTO-FILL - THIS SOMETIMES CAUSES ISSUES!

# SETTING UP

-  Fill in your business details, check out the terms of service, and create account.
-  Let us know the onboarding package you would like and the number of employees, and we will send over an invoice. Once that is paid, you will unlock all of the business profile features!
-  On the wallet, add at least two sign-off admins who will approve all payments out of the account



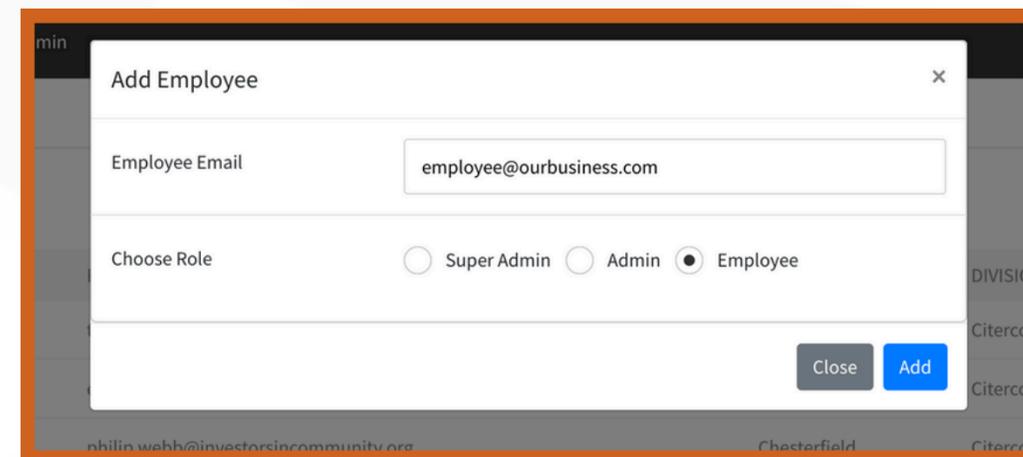
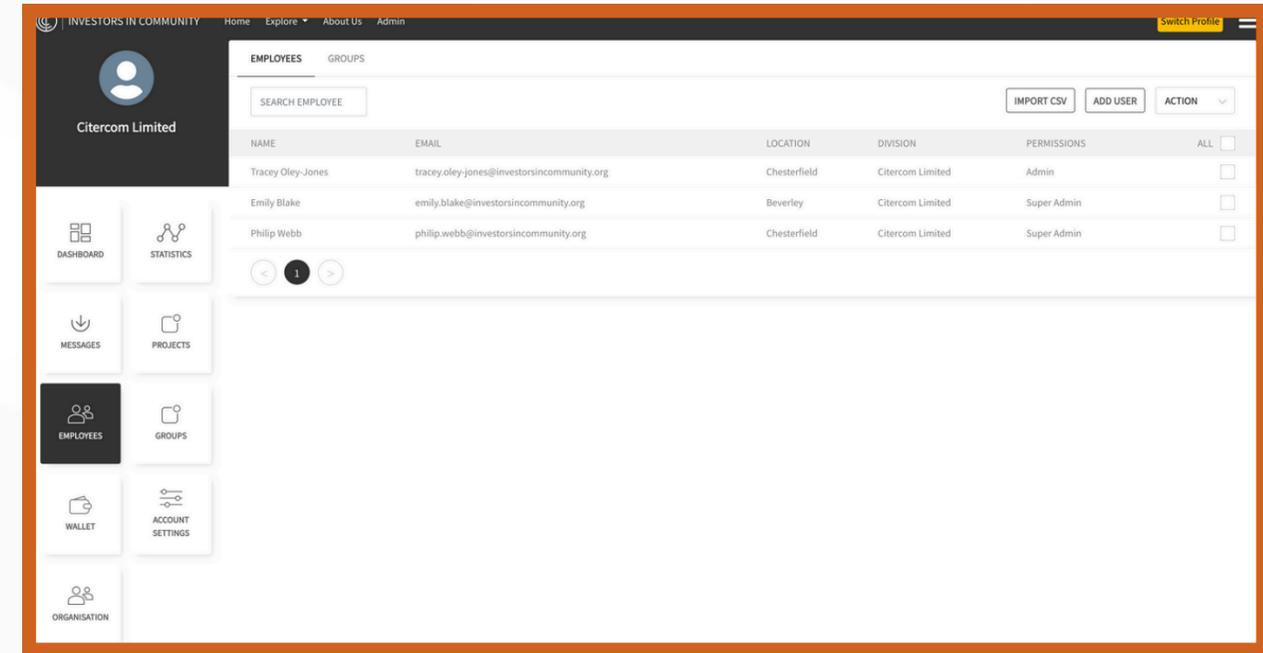
The screenshot shows a two-step account creation process. Step 1, 'Personal Details', is completed. Step 2, 'Business Details', is active and contains the following fields: Business Name, Business Email, Registered Business Number, Business Phone Number, City, Business Address, and Post code. A checkbox for 'I have read and agree to the Terms of Service' is present, and a green 'CREATE ACCOUNT' button is at the bottom right. On the left side of the form, there are three options: 'Sign Up as Individual' (with a sub-description about earning Community Credits), 'Create Good Cause/Charities' (with a sub-description about engaging with businesses), and 'Create Business Account' (with a sub-description about becoming a business member for £30 per employee per annum).

# ONBOARDING EMPLOYEES

IN THE ASSET PACK, WE HAVE PROVIDED AN EMAIL THAT CAN BE SENT OUT TO YOUR TEAM TO LET THEM KNOW OF YOUR MEMBERSHIP. THIS WILL EXPLAIN TO EMPLOYEES HOW THEY CAN SIGN UP AS A PART OF YOUR BUSINESS, RECOGNISING THE SUPPORT YOUR ORGANISATION IS GIVING THROUGH VOLUNTEER DAYS.

 Log in to your individual account, switch profile to your business account through the yellow button in the top right, and enter the employees tab.

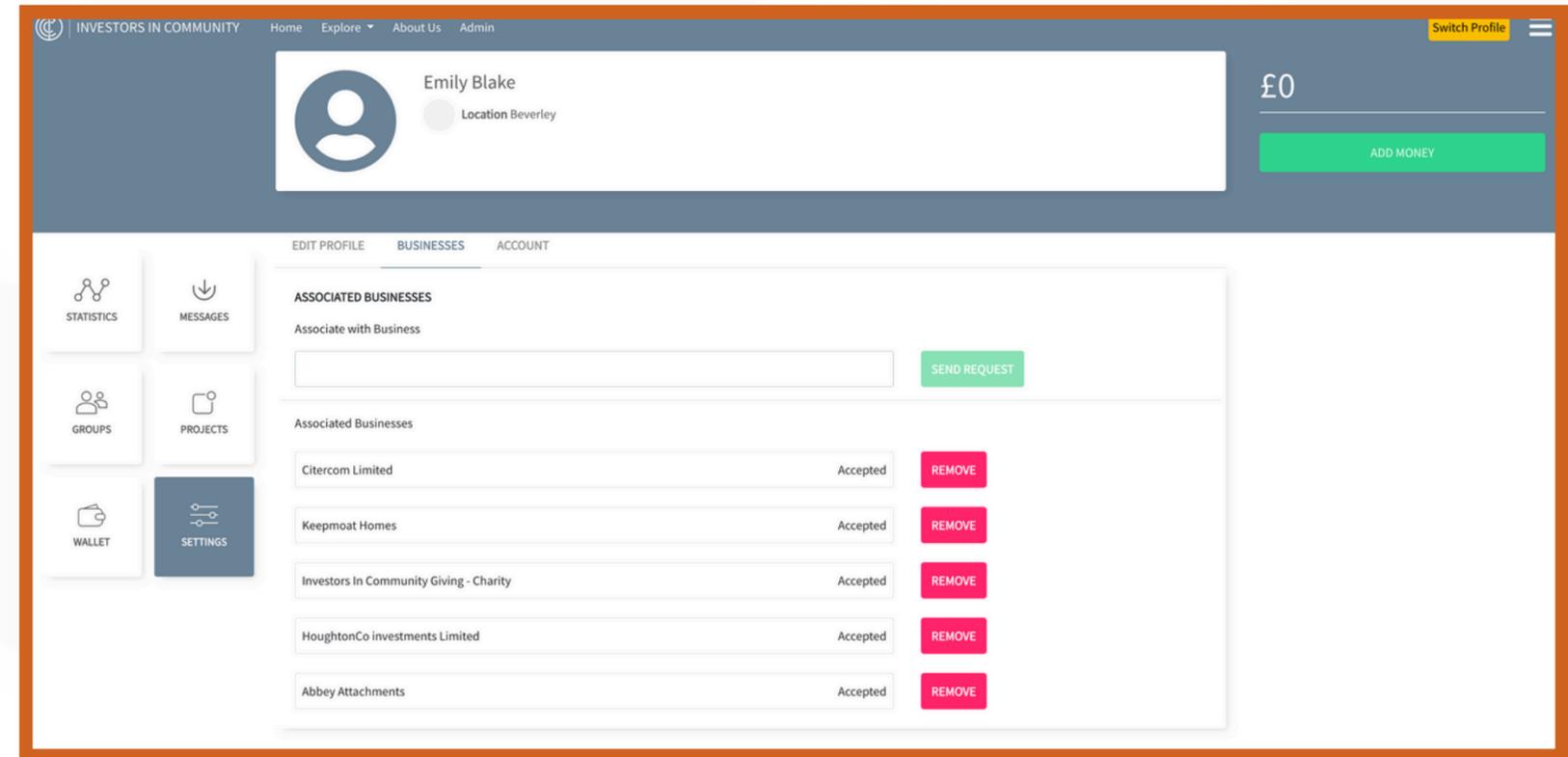
 Click add user, and fill in the employee email. This will invite them to sign up, and add them as an employee



# ONBOARDING EMPLOYEES

ALTERNATIVE OPTION [GUIDANCE GIVEN IN RECOMMENDED EMAIL]

-  Prompt employees to sign up as an individual.
-  Once on, they can go to their account settings, click on the business tab, and request to associate with your business.
-  Any requests will come through to your employee requests section on the dashboard to approve.



# ONBOARDING EMPLOYEES

ALTERNATIVE OPTION [GUIDANCE GIVEN IN RECOMMENDED EMAIL]

Once employees are on board, they are able to select any project of their choosing for their volunteer days, making sure they can use their volunteer time for the causes they care about. When volunteering, your employees will see the option to volunteer on company time, and if they select this, you will also receive some recognition for the work they did.

Emily Blake

Short description of the skill, free text

Volunteering Hours: 10

What would you normally charge for this work?

Estimates of your charge rate

Hourly charge  Charge rate per Project

I will be volunteering during work hours

VOLUNTEER NOW

# JOINING GROUPS

THE IIC PLATFORM HAS TWO TYPES OF GROUP - PUBLIC AND PRIVATE

 Public groups are visible to all users on the platform, and can be joined by anyone. These are used to highlight the work you and other businesses are doing in an area.

 Private groups are visible only to the members, and joined by ID and pin. These can be used to track your entire supply chain, or your suppliers within a specific contract, to keep a measure of the total contributions being made.

HAVE A LOOK AT THE CORRESPONDENCE DOCUMENT FOR AN EMAIL TO SEND OUT TO YOUR SUPPLIERS TO GET THEM ON BOARD AND SUPPORTING THEIR COMMUNITY.

# JOINING GROUPS

## PUBLIC

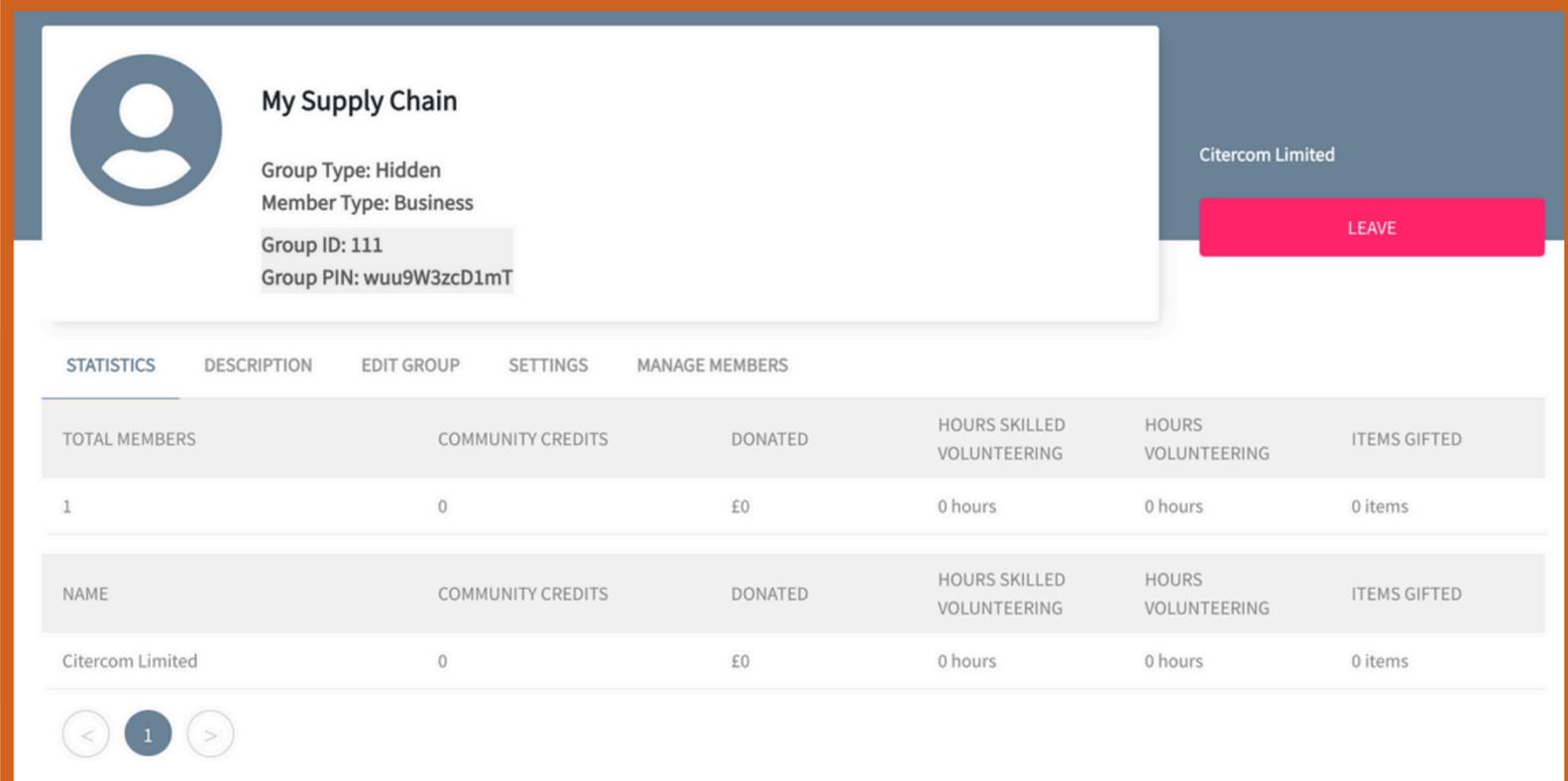
-  Click the explore tab at the top, then groups.
-  Find a business group you would like to join, select the group, and choose your business profile as the profile to access it through.
-  Press the green join button.

## PRIVATE

-  To join a private group, you must know the ID and pin from a member of the group.
-  Go to the groups tab on the business dashboard, and press join group.
-  Fill in the group ID and pin to join.

# CREATING GROUPS

-  Go to the groups tab.
-  Fill in the information you are prompted for.
-  If you want the group to be private, select hidden.
-  Spread the word to people you would like to join the group! For private groups, be sure to share the ID and pin.



**My Supply Chain**  
Group Type: Hidden  
Member Type: Business  
Group ID: 111  
Group PIN: wuu9W3zcD1mT

Citercom Limited [LEAVE](#)

STATISTICS DESCRIPTION EDIT GROUP SETTINGS MANAGE MEMBERS

TOTAL MEMBERS	COMMUNITY CREDITS	DONATED	HOURS SKILLED VOLUNTEERING	HOURS VOLUNTEERING	ITEMS GIFTED
1	0	£0	0 hours	0 hours	0 items

NAME	COMMUNITY CREDITS	DONATED	HOURS SKILLED VOLUNTEERING	HOURS VOLUNTEERING	ITEMS GIFTED
Citercom Limited	0	£0	0 hours	0 hours	0 items

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# LOADING THE WALLET

FOR USE OF THE WALLET, MAKE SURE YOU HAVE AT LEAST TWO SIGN-OFF ADMINS. WITHOUT TWO SIGN-OFF ADMINS, YOU WILL NOT BE ABLE TO MAKE PAYMENTS FROM THE WALLET.

-  Head to your business profile, and click the wallet tab.
-  Follow the big green add money to wallet button.
-  Fill in your details.
-  Fill in the amount of money you would like to add, then start supporting your community!

# CREATING PROJECTS

AS A BUSINESS, YOU CAN CHOOSE TO SET UP PROJECTS ON BEHALF OF A CHARITY, WHETHER THAT BE TO RAISE MONEY FOR THEM, OR TO MAKE A PUSH FOR VOLUNTEERS.

-  Head to the business profile and click on the projects tab.
-  Click create project, fill in all of the prompted information and add an image.
-  You can set up a project for any kind of giving to a charity.
-  Save the project as a draft, then fill in the select charity to associate with box with the charity you would like the support to go towards. Select them from the drop-down menu, and click associate charity.
-  Once the charity has approved the project, it will join their profile as a way to support. Make sure to share the link to your project to get more support!

BEAR IN MIND, A CHARITY WILL NOT RECEIVE THE SUPPORT UNLESS THE PROJECT REACHES ITS MINIMUM GOAL. WE RECOMMEND SETTING THIS TO 1 IF SUITABLE.

FOLLOW THE BEST PRACTICE FOR PROJECT CREATION GUIDE IN THE ASSET PACK FOR SUCCESSFUL PROJECTS!

# START GIVING!

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**YOU ARE ALL SET TO GO. MAKE SURE YOU KEEP AN EYE ON THE PROJECT MARKETPLACE FOR LIVE UPDATES ON WHAT SUPPORT YOUR COMMUNITY NEEDS.**

**IF YOU COME INTO ANY DIFFICULTIES, CONTACT US ON THE INFORMATION BELOW, AND WE WILL BE THERE TO LEND A HAND.**

**EMAIL: [EMILY.BLAKE@INVESTORSINCOMMUNITY.ORG](mailto:EMILY.BLAKE@INVESTORSINCOMMUNITY.ORG)**



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