Manager

Hello and welcome to your step by step guide to getting started with iKnow Charity.

To help you get started and find your way around the programme, we've provided this guide. Designed to work in tandem with our support tutorials and videos, just follow the links beside each area to be taken to the relevant guides. We offer completely free, unlimited help and support. If you get stuck and you can't find what you're looking for on our support site, don't panic. You can get in touch with us and our amazing support team will be happy to help you out.

Now that you've completed this stage, you should have a good idea of how iKnow works. Of course, there's always more to learn and more to do. At this point, feel free to explore the system as you need and really get it working for your Organisation. Alternatively, we have a Phase 2 guide to take you further. Before progressing to this, we'd recommend that you have all of your Charities contact's data added to the system. You're able to do this through a data import to save time if you wish.

To download the Phase 2 stage, click **https://support.iknowcharity.co.uk/i-am-a/manager**

EXPLORE THE DASHBOARD
https://support.iknowcharity.co.uk/dashboard/dashboard

- [ ] Change the layout of your Dashboard using the Dash Settings.
- [ ] Click on 'Me', upload a picture of yourself.
- [ ] Ensure that your details are correct and change your password to something personal and memorable.
- [ ] Head into 'Settings' from the Dashboard and open the 'Dictionary'. Change the Vocabulary under the Global Dictionary. Make sure that this matches your organisation's language so as to avoid any confusion for other leaders when they start using iKnow Charity too.

PEOPLE
https://support.iknowcharity.co.uk/modules/people/

- [ ] Add five single people within the People Module with mixed journey items.
- [ ] Add a Family, Two Parents and 2 Children in the same Address.
- [ ] Add another person and use a different email address which you have access to. This will be helpful for when you're exploring Admin Groups as well as other areas within the programme.

EVENTS
https://support.iknowcharity.co.uk/modules/events/

- [ ] Set up a Public Series event in the Events Calendar for your regular Staff Meeting. Set this to repeat every week and for the repetition to 'Never End'. Where possible, enter the first event of this series in the past so that you can record attendance later on.

FINDER

- [ ] Create a search for all of your regular contacts which fit into the age category of 18-55. Save this as a Global Search.
- [ ] Create a Search for all of your contacts who have completed a Journey Landmark. Save this as a Private Search. Note the difference between Global and Private Searches.

SETTINGS
https://support.iknowcharity.co.uk/modules/settings/

- [ ] From the Dashboard, head into Settings. Make sure that the Programme is using your Charity's vocabulary in the 'Dictionary' area.
- [ ] Check that your Organisation location is correct and the address is complete in the 'Locations' area.
- [ ] In the 'Admin Groups' area, check that you're happy with the level of Access and permissions for the Five default admin groups. Create another Admin group for 'Office Staff', give them the relevant access and permissions.
- [ ] Create a Team and a Group for your Charity from the relevant areas.
- [ ] Check that the 'Journey' area accurately reflects the engagement journey of your Charity and that the landmarks are relevant for you.
- [ ] Upload 2 images to the Scroller.