

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.

## 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.

## FINANCE

<https://support.iknowcharity.co.uk/modules/finance/>

- Open the Finance Module from the Dashboard.
- In the Events Finance Tab, input some 'loose cash' donations in the 'banking' tab
- Create at least one Campaign and Designation. Call it 'General Donations' (or named accordingly for your organisations vocabulary).
- Set up at least 10 Giving ID's for members of your Charity. We recommend using the format of Initials and Date of Birth for example CG090991.
- Input 10-20 different transactions. Assign them to a giving ID and the Campaign which you set up earlier. Make some of these Cash so that you can see how the unaccounted for cash is reconciled to the donor.
- Go to List of Givers and produce a giving statement for yourself.
- Produce a Batch Giving Statement for the whole Charity.

## 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.