Manager

PHASE 2

This can either be done immediately after phase 1, or at a later date. However we would advise that your Organisation has all of its contacts data in the system before this.

TEAMS

https://support.iknowcharity.co.uk/modules/teams/

- ☐ From the Dashboard, Select 'Teams' from the tool-bar or drop down menu. Select your team from the options. If you can't see it on the list, you may need to speak to the Administrator.
- ☐ Initiate a Conversation within iShare, upload a document to your Conversation.
- ☐ Create a Rota for a regular activity, Add Roles to the Rota. Add yourself onto the rota, once more people have been added to your team, you'll be able to add them to the Rota too. Test out the Holiday and Clash Warning system by adding yourself to multiple roles and booking yourself some time away within 'Me' (From the Dashboard).

GROUPS

https://support.iknowcharity.co.uk/modules/groups11/

- ☐ From the Dashboard, select 'Groups'. Create an event within the groups calendar which reflects your small group's meeting arrangement. Set the start date a week in the past so that later on you can do the next step.
- ☐ Record attendance for your group for the previous meeting.

TICKETING

https://support.iknowcharity.co.uk/modules/ticketing/

- ☐ Create a new ticketing event for a fundraising event of your choice.
- ☐ Fill in the Venue details, set up your tickets and prices and any delegate information you may need to capture.
- ☐ Format your ticket page with your Charity's images and branding.
- ☐ Share your ticketing page on your social media platforms.

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.