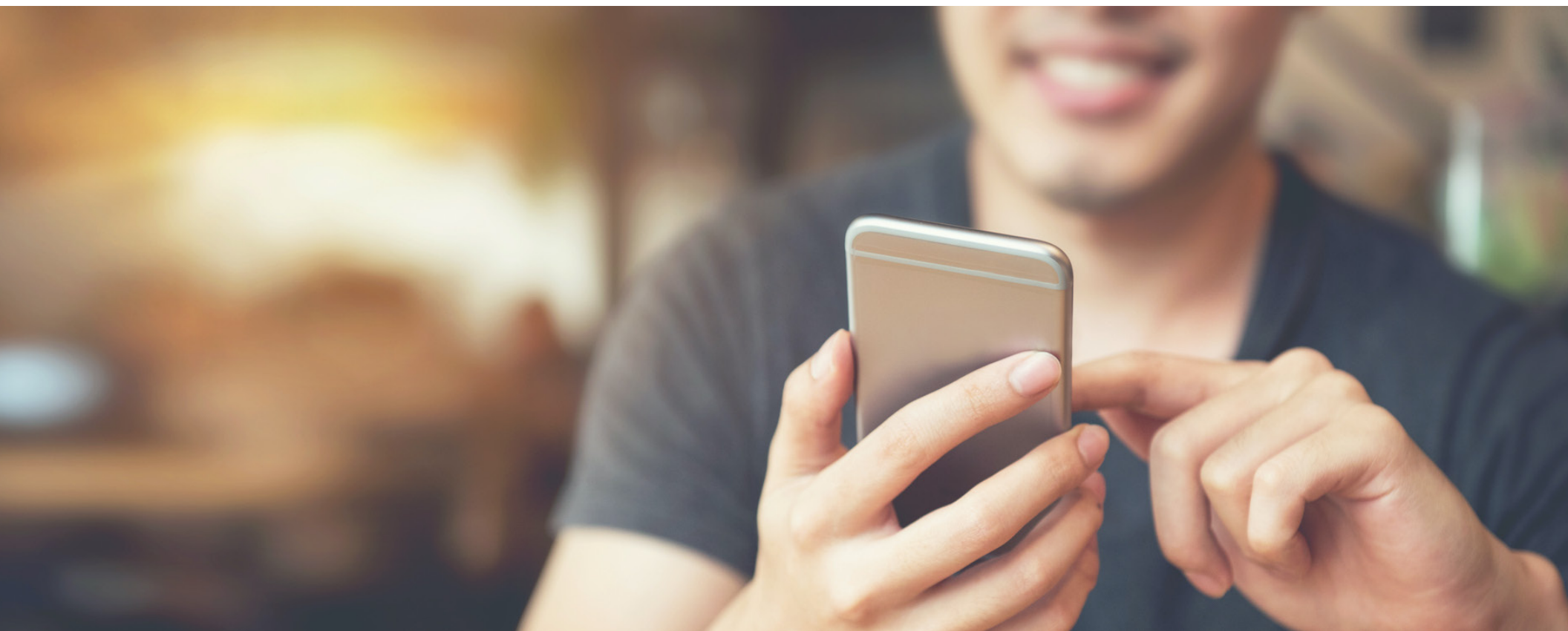




Getting Started Guide



text2fund

Getting Started Guide

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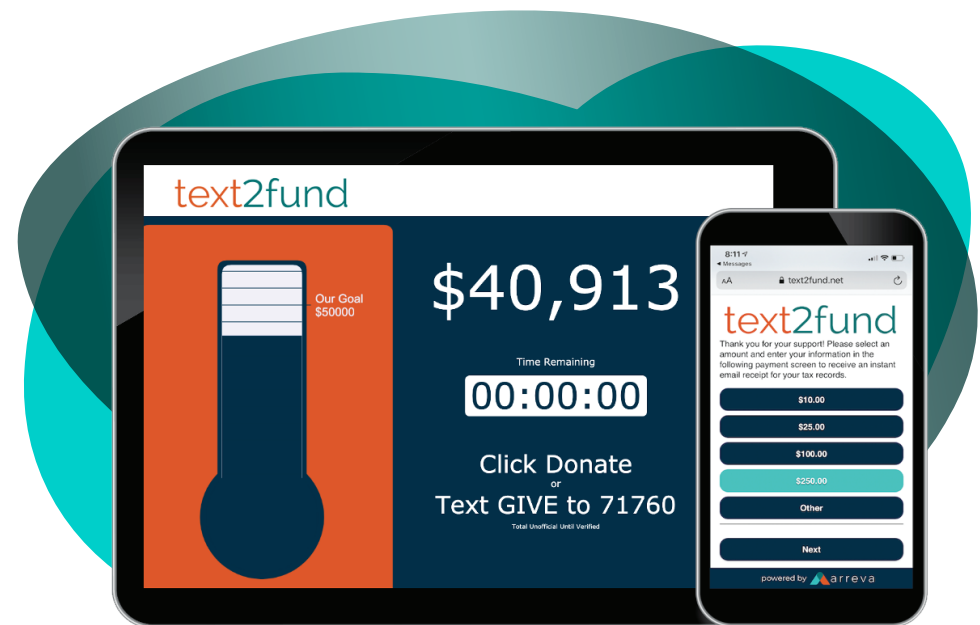


Choose Your Keyword

Keep your keyword short and sweet. It's best to use ten characters or less, so it's easy to remember and hard to misspell. If you're using an acronym associated with your organization or your campaign, be sure to instruct participants to text "capital" letters – this turns off the auto-correct function on smartphones for more accurate texting.

Like the 10-digit phone number you typically use for calls, you will have a 5-digit number. The short code is 71760 and, when used, will trigger the automated reply with a link to your Text2Fund donation page.

Send an email with your organization name and the first and second choice for your keyword to info@text2fund.com. You will receive a response either confirming your choice or suggesting an alternate keyword. If you do not specify a keyword, one will be suggested on your behalf. It can be changed if required.



Set Up Text2Fund Account

Log in to the Text2Fund Campaign Manager using the login name and password from your Text2Fund welcome email. Make sure your credentials work by logging in at text2fund.net.

We recommend that you use Firefox, Safari, or Chrome browsers and not Internet Explorer as some versions of IE do not support all Text2Fund features. You will need to have JavaScript enabled to use the Text2Fund administrative website.

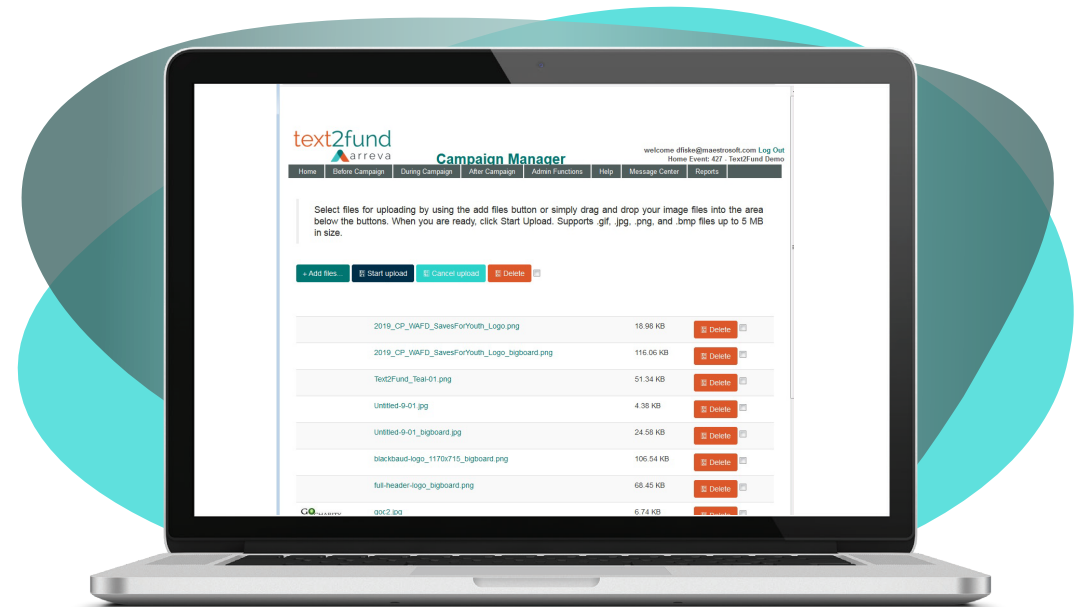
A sample Text2Fund Welcome eMail is attached to this document for your reference.



Before Campaign > Set Up > Step 1

Upload Your Pictures

Upload your first screen image and thank you page image. Supported image files are gif, jpg, png, and bmp files up to 5 MB in size. Your image will be auto sized to fit the first screen image and thank you page. However, the image field is banner width, and it is best to use a 1300x300 for the image dimensions. You can use the same image for both screens or separate images.



Before Campaign > Set Up > Step 2

Configure Basic Settings

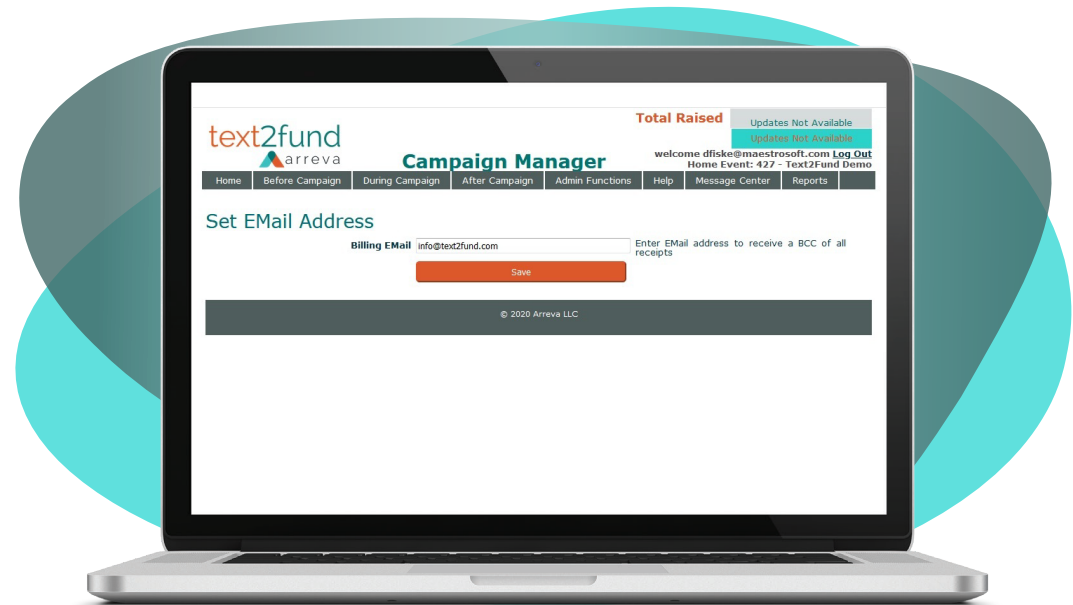
Make sure to create a unique campaign name and use the First Screen Caption box to provide a detailed message to your potential donors. The caption should be heart felt, specific to your campaign values and goals, and explain why a donation is needed.



Before Campaign > Set Up > Step 3

Create Payment Notifications

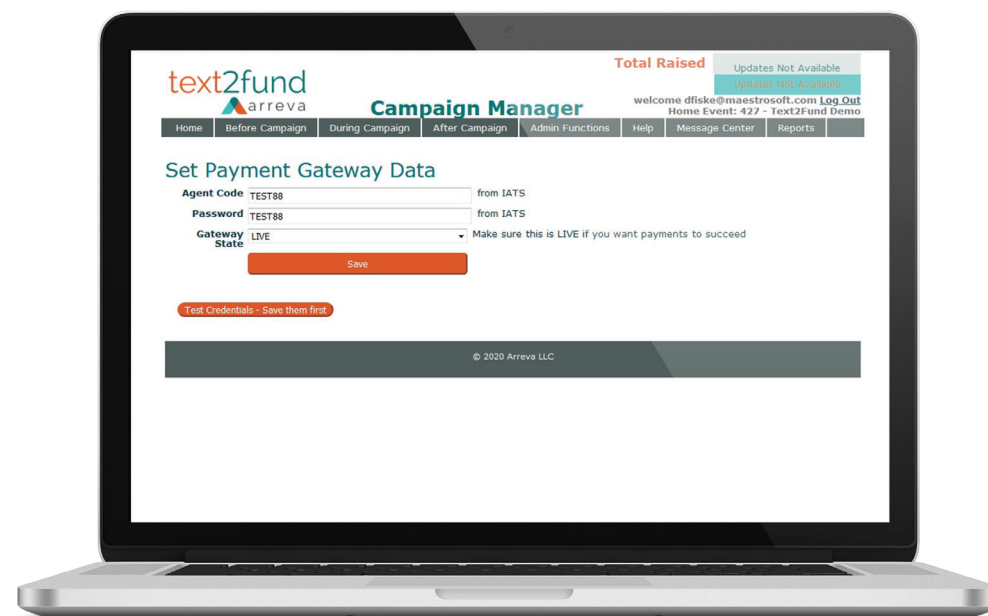
Determine who in your organization will be in-charge of running the Text2Fund campaign and add their email address to receive copies of all receipts. This is a proactive step in case a participant can't locate their receipt, and you need to resend it.



Before Campaign > Set Up > Step 4

Set Up Payment Processing

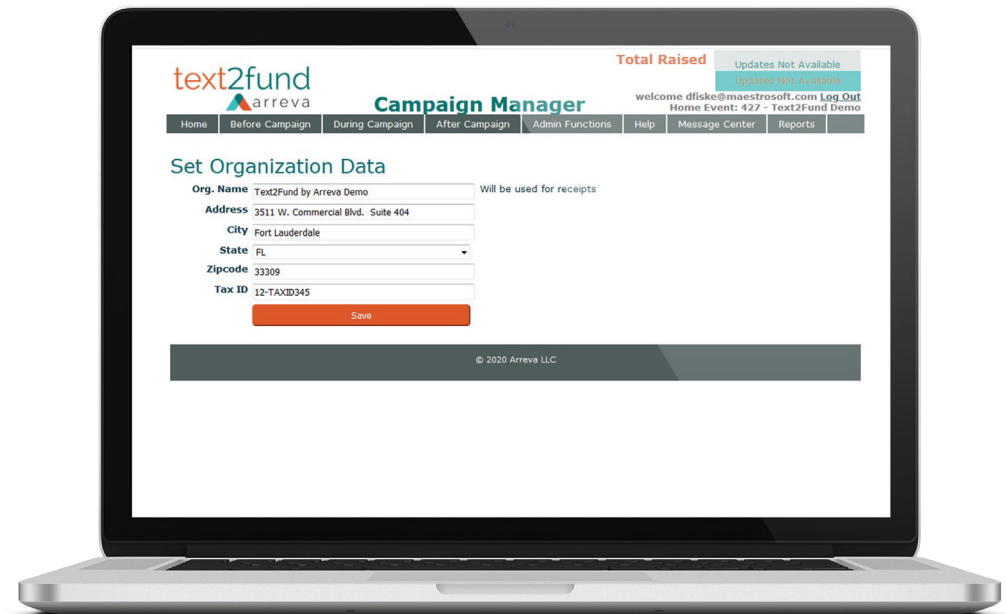
This is where your merchant gateway login credentials go. Make sure your payment gateway data credentials are correct. We usually enter these for you, but sometimes we don't have that information yet. Save your merchant credentials, and test to be sure it is working properly.



Before Campaign > Set Up > Step 5

Input Payment Receipt Data

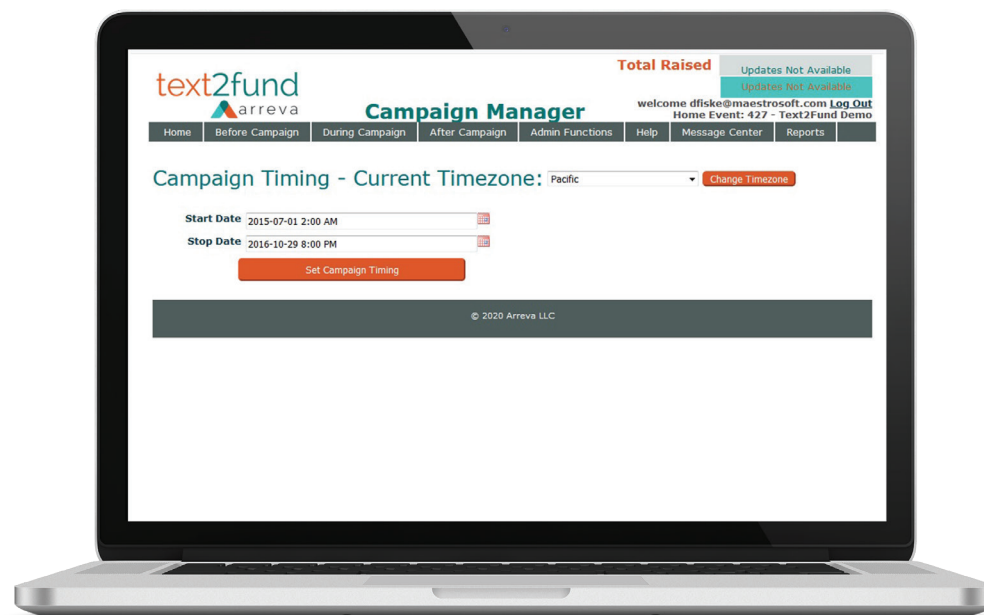
Enter your organizational data that shows up on your donor's payment receipts. It is important you complete this area so donors will have valid information for potential tax purposes. Input your official organization name, address, and Tax ID number.



Before Campaign > Set Up > Step 6

Manage Campaign Timing

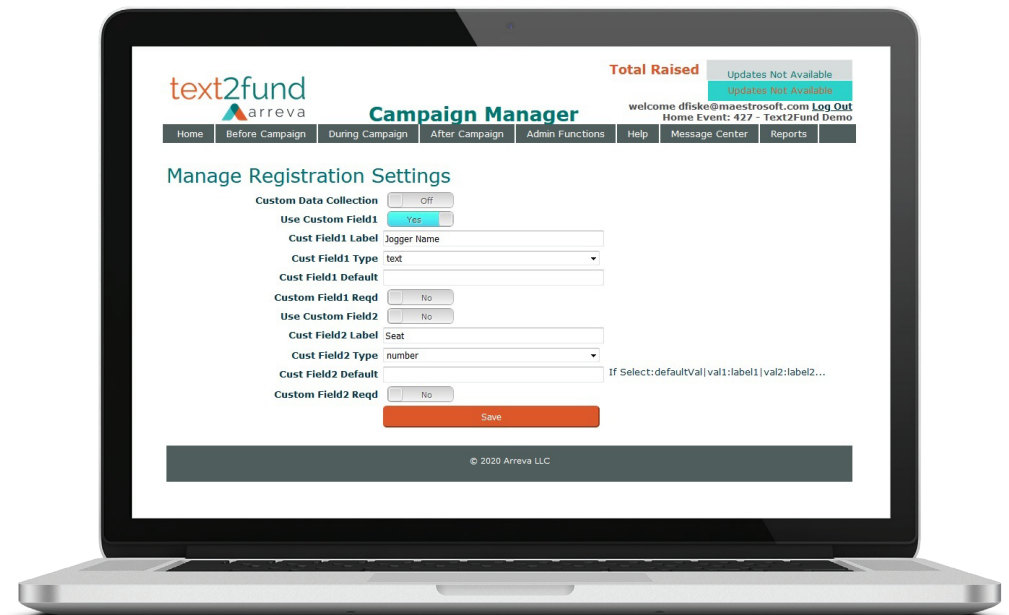
Adjust your campaign Start Date and Stop Date as necessary. By default, when your campaign is first created by MaestroSoft, the start and stop date will be the same as listed on your Text2Fund agreement.



Before Campaign > Advanced Tab

Create Optional Fields

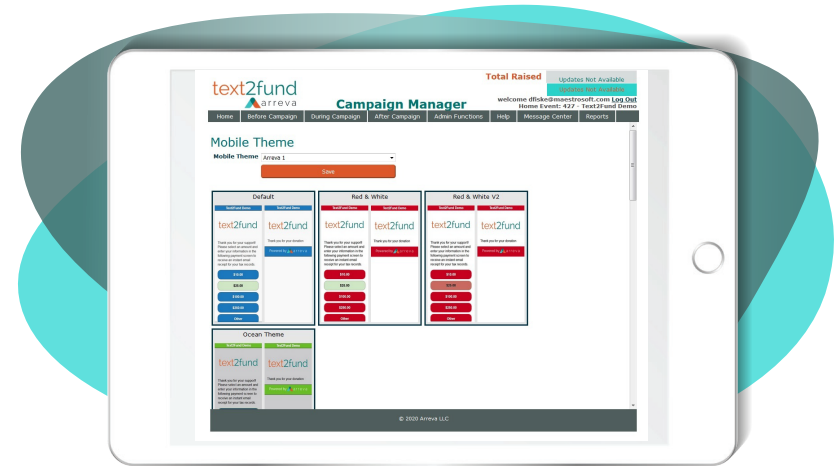
Add additional questions to your campaign donation page. You can easily track results for a specific query. Questions should be short and simple to answer, like "Have you donated to our charity before?"



Before Campaign > Advanced Tab

Select Theme Options

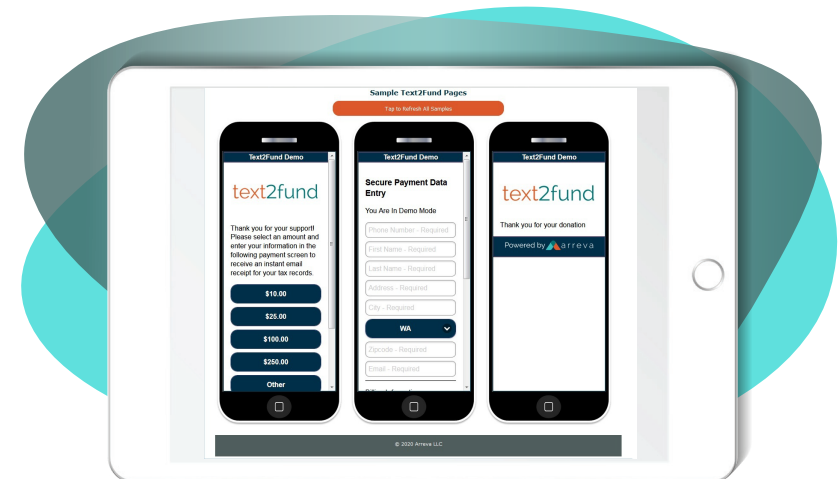
Pick a campaign color scheme that matches your organizational colors.



Before Campaign > Advanced Tab

View Sample Displays

Use this screen to view a sample of what your campaign looks like on a cell phone. Now that you know how your campaign looks, make changes as necessary.



Before Campaign > Advanced Tab

Configure Thermometer/Recognition Display

Adjust the colors and scroller for your campaign thermometer. There are several different fields to input colors for your thermometer. Each field includes a drop-down pick list. You may select an image from your image library to display on the thermometer. Insert a custom thermometer scroller message and edit recognition caption fields as necessary.



Before Campaign > Advanced Tab

Embed Status Widget on Website

It is a good idea to add a thermometer status widget on your event and/or organization website. This will allow constituents to view the success of your campaign!



Home Tab

Get to Know the Home Screen

Use the Campaign Summary box to view important fundraising statistics related to your campaign in real time. Use the Campaign Setup Tasks box to make sure you have completed all setup tasks (every task should have a green "Completed" mark next to it). Use the Manage & Monitor Campaign list to view important reports related to your campaign.

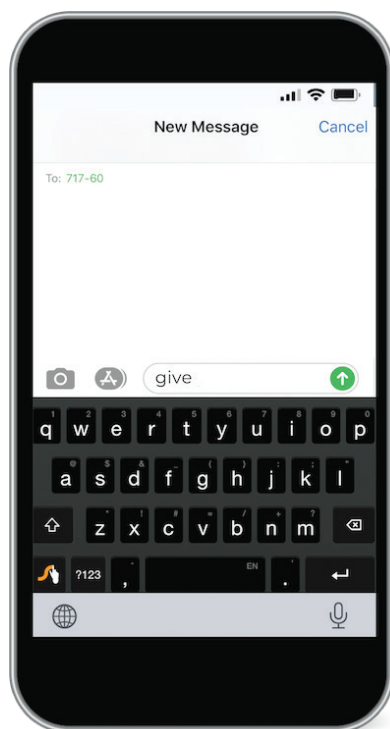


Make a Test Donation

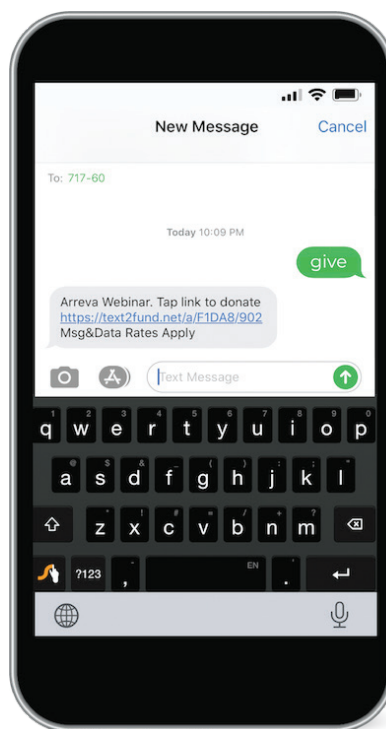
The best way to make sure it works is to test it yourself by texting your keyword to 71760 on your own phone. It doesn't have to be a big donation. Give something small so that you can experience the full giving process personally.

Follow Three Simple Steps in the Campaign Example Below

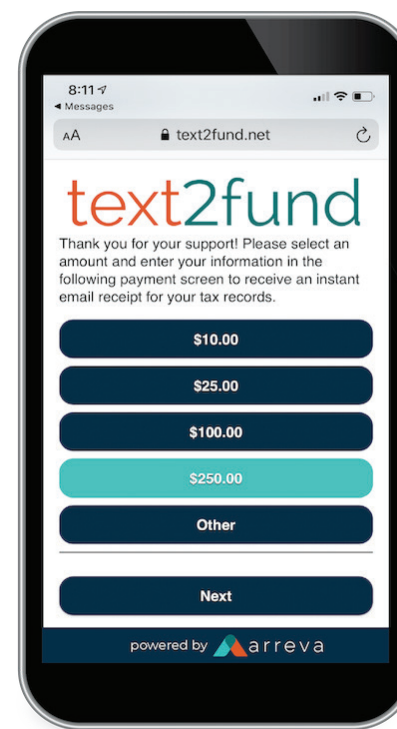
Text KEYWORD to 71760



Click the Link



Donate



You can then see how the process works firsthand as an end-user. It gives you a chance to review the whole process, including payment confirmations, automatic notifications, transaction, and reporting analytics.

Next Steps

View the Optimize Your Text2Fund Campaign Guide to review the during and after features of the Text2Fund Campaign Manager.

Throughout your campaign, please reference our Steps to Campaign Success Guide for everything you can do outside the software to make your Text2Fund campaign a success.



Appendix

Text2Fund Welcome eMail

Hi [Client Name],

My name is [Text2Fund Implementation Specialist Name] and I will be working with you to set up your Text2Fund campaign.

A new Text2Fund campaign has been created for you and is waiting for you to personalize it.

Management Access:

The management web site is: Text2Fund.net

Your user name is your email: name@domain.com

Password is: arreve (all lower case).

Your keyword is: ARREVA which is not case sensitive

Your Call to Action is: Text ARREVA to 71760

Getting Started:

Follow these easy steps to personalize your campaign and get started raising funds:

- Log in to the management web site at Text2Fund.net and make sure your credentials work. We recommend that you use Firefox, Safari, or Chrome browsers and not Internet Explorer as some versions of IE do not support all Text2Bid features. You will need to have javascript enabled in order to use the site.
- Click on Before Campaign on the top navigation bar and follow the numbered steps:
 1. Upload Images. Images are displayed on the first mobile screen and on the thank you screen. You can use the same image for both screens or separate images.
 2. Basic Settings
 - Campaign Name - will show up in a title bar at the top of all screens
 - Payment Page Image - at the top of the first screen
 - Page Caption - will be right below the image on the first screen
 - Thank You Page Image - at the top of the thank you screen
 - Thank You Page Caption - right below the thank you image
 - Target - optional, but will be used by thermometer displays
 - Default Donation - must match one of Amount1 - Amount4. It will be highlighted when guests first view the screen
 - Amount1 - Amount4 - recommended donation amounts. Use numbers only - no dollar signs
 3. Set an Email address to receive a copy of all receipts. This is a good idea in case someone can't find theirs and you need to resend it.
 4. Enter Payment Gateway Data. This is where your merchant gateway login credentials go. We usually enter these for you, but sometimes we don't have that information yet.
 5. Enter/Edit Receipt Data for Organization - enter the official address and tax ID of your organization for receipt purposes.
 6. Manage Campaign Timing - if you want to change the timing. By default, we open your campaign at the time we send this email and it stays open for 3 months.



Contact Us with Questions

The Text2Fund Team will provide help if you have any questions.

Email questions to: info@text2fund.com

www.text2fund.net



Arvea® is a trusted advisor and market leader of fundraising, donor relationship management, and virtual auction software serving the nonprofit industry for more than three decades. Arvea's, ExceedFurther® All-in-One virtual fundraising and donor relationship management solution along with MaestroAuction™ virtual, live, and silent auction software and services are helping nonprofits further their mission, cultivate donors, and raise billions of dollars.