

**frontstream**<sup>TM</sup>  
SUPPORTING THE GOOD YOU DO

# artez<sup>TM</sup> eBook

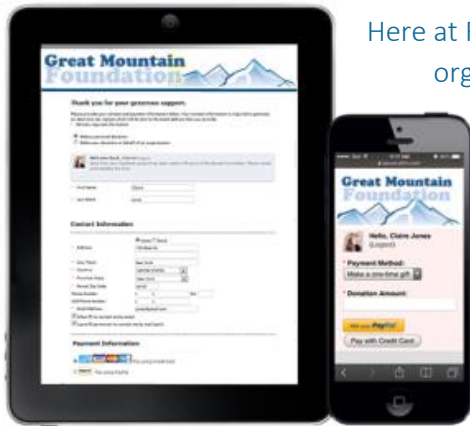
Edition 1.0

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# Welcome to Artez Basic

FrontStream is a complete solution for nonprofit, educational, and corporate philanthropy. Panorama helps our clients fundraise for projects, manage events and auctions, and grow their annual giving programs. We provide an unparalleled set of tools and data that enables nonprofits and corporations to better understand and enhance the impact of their collective philanthropic efforts. Our solutions serve over 30,000 nonprofit, educational, and corporate clients, raising over \$1 billion for good causes annually.



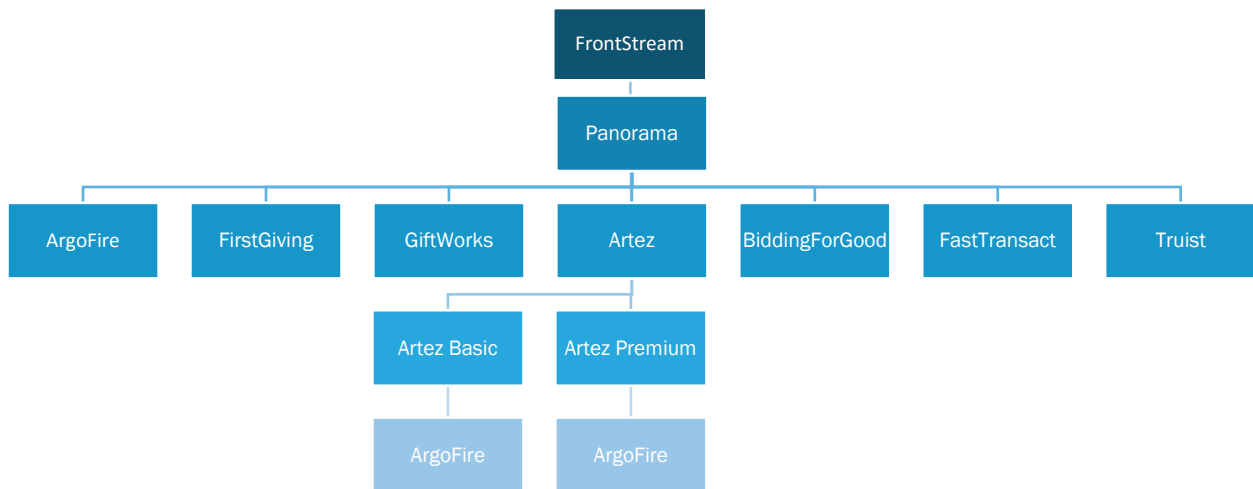
Here at FrontStream, we have a wide range of products to fit your organization's needs. Artez is FrontStream's online donation platform that gives your organization complete control over design, communications, and reporting. You will be able to build a fully integrated online donation program for your charity or nonprofit organization!

What does the Artez Basic platform give you access to?

Artez Basic will give you a sneak peek of our products, allowing you to use our Purchase Items and Donation and Tribute templates!

Those aren't the only products we have on our Artez platform. We also have a Peer-to-Peer Fundraiser where you can manage large fundraising campaigns with one flexible system! If you've ever donated to a friend participating in a walk, run, or relay (or registered for one yourself), chances are you've already used Artez's powerful platform. That's just an example of one of our many products.

If you are interested in exploring any of our other products, [visit our site](#) and schedule a call with a FrontStream representative!



# Roadmap

This is an interactive road map to help you visualize how you will set up and build your template. We will take you step by step through each of the functions in the platform. Follow the roadmap starting at the first box to walk you through the backend of Artez, and if you get lost, we've hyperlinked a lot of important key words so you can easily find them in the eBook.



# Important Resources

Setting up your first template in Artez can be a bit overwhelming. We have resources in place to help you and educate you on our software. This eBook is here to help you every step of the way so you don't have to feel like you're doing this alone!

We recommend saving this eBook in a safe but easily accessible place, like your desktop, so you can reference it often when working with Artez.

## Administrator Login

If you ever forget it, here is the link to the backend of Artez. Bookmark this into your browser so that it is easily accessible.

<https://admin.e2rm.com/Login.aspx>

## Knowledge Base

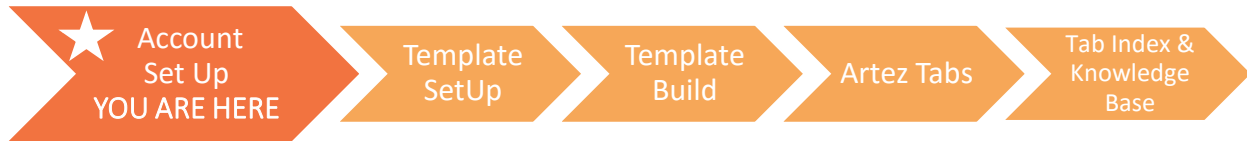
Reference the [Knowledge Base](#) if you can't find what you're looking for here in the eBook. Here you will find step-by-step instructions and how-to videos for everything ranging from information on payment processing to tips on style settings!

## Support Team

Stuck? Our support team is here to help you if you are having a technical issue or just need some help. [Log a Ticket](#) through the FrontStream website and support will contact you.

# Setting Up Your Account

The Configuration Tab will be the starting point for creating a Donation and Tribute and/or Purchase Items template! Here you'll create the foundation of your Artez account by setting up your payment gateway, tax receipts, and account administrators.



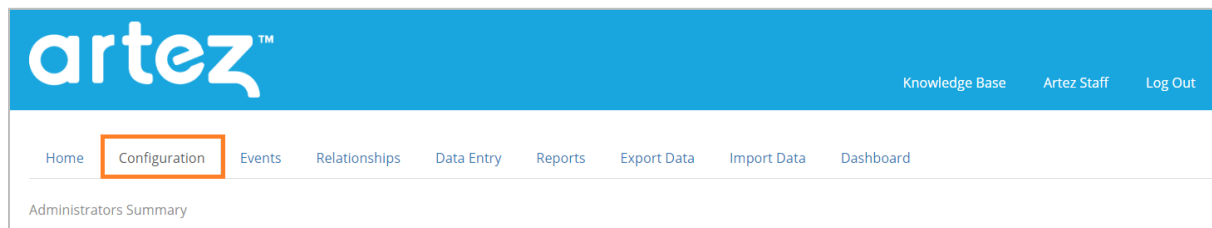
**Reminder:** Before any of this can begin, have you submitted your ArgoFire (Payment Gateway) account details? This is how we transfer your funds into your account and is a crucial step of getting started. Click [here](#) to see the email that you will receive when your ArgoFire application has been approved. If there are any issues regarding your ArgoFire application, you will be contacted by either First National Bank of Omaha (for U.S. clients) or Elavon (for Canadian clients) to sort these out. If you have not set up your ArgoFire account, please contact [Melissa.Thomas@FrontStream.com](mailto:Melissa.Thomas@FrontStream.com)

In this section, you will become familiar with:

1. Payment Gateway
2. Tax Receipts
3. Administrators

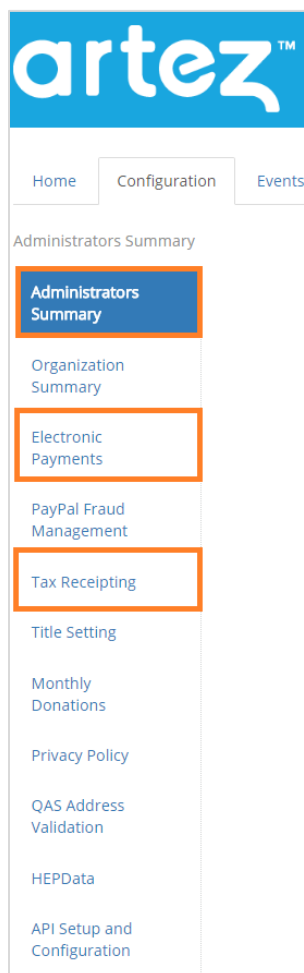
# Setting Up Your Account Details

Before you can create a template, you will need to get your account details set up through the Configuration tab. This can be found in the menu bar at the top of the page second from the left.



The **Configuration tab** is where you can configure your important account settings (e.g. administrator setup, tax receipts setup, payment gateway setup, integration setup, etc.). Make sure all your settings are configured correctly before you start creating events.

**Note:** Any change or update you make in the Configuration tab can affect your existing or newly created events.



## Administrators

You can add additional administrators to your Artez account. You can give them as much or as little access to your Artez account as you like.

## Payment Gateway

Your payment gateway processes online credit card transactions. Please ensure your gateway credentials are entered correctly; otherwise, you won't be able to process your donors' donations.

## Tax Receipts

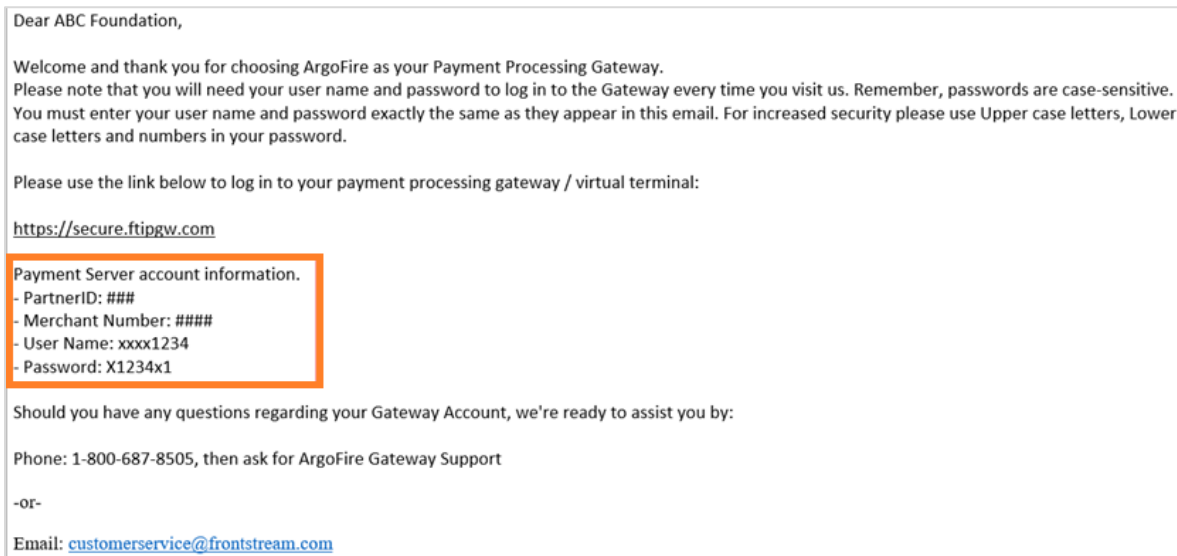
Once a donation is made online, your donor will receive an electronic tax receipt which is sent in PDF format. Unless you're issuing tax receipts by location, you can simply update our Default Tax Receipt template.

# Setting Up Your Configuration Tab – Payment Gateway

Your payment gateway processes online credit card transactions. Please ensure your gateway credentials are entered correctly; otherwise, you will not be able to process your donors' donations.

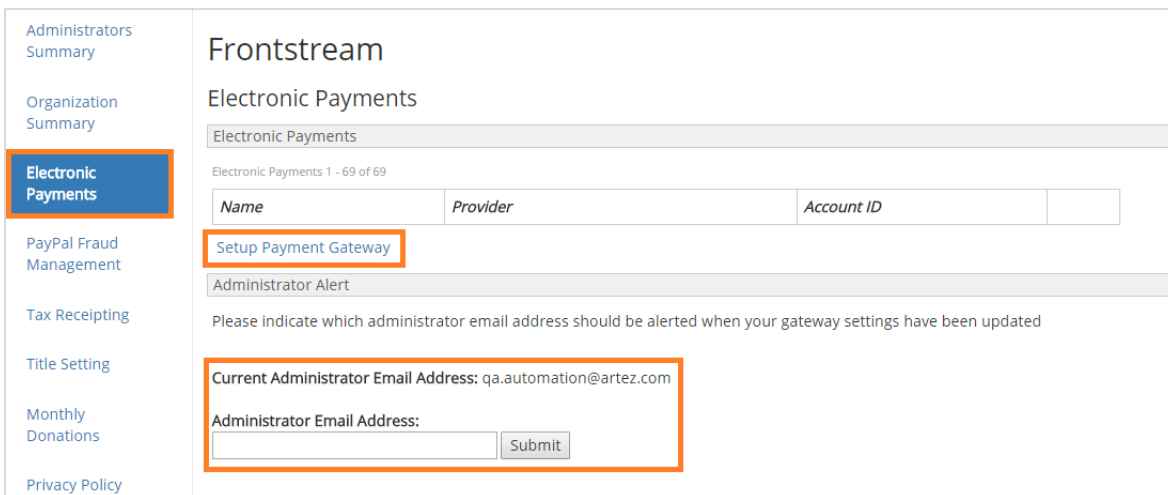
If you have not signed up for a payment gateway and are needing to do so, please contact Melissa Thomas at [Melissa.Thomas@frontstream.com](mailto:Melissa.Thomas@frontstream.com). After you have contacted her, you will be given a payment gateway application form that needs to be completed along with required documents.

This image below is an example of the email you will receive when your ArgoFire payment gateway application has been approved.



Once you receive this email, you will be able to begin the process of setting up your payment gateway through the Configuration tab. Follow the steps below to get started.

1. In the Configuration tab, click on the **Electronic Payments** button from the left-hand menu.



When you first go to this page, no providers will appear until you set them up.



If you would like to have the system send out a notification email whenever gateway information is changed, type the email address below in the **Administrator Email Address field**. This provides added security.

2. To set up a payment gateway, click on the button **Setup Payment Gateway**.

If you have already set up your gateway and want to change the setup information, click the **Details** link beside a provider to do so.

FrontStream Test	FrontStream Gateway	123456789	<a href="#">Details &gt;</a>
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3. Enter your account information from your account confirmation from ArgoFire. You are required to fill out all fields on this page.

### Electronic Payment

\* denotes required information

Provider:

Gateway Nickname:  \*

Account ID:  \*

Password:  \*

Fraud Prevention :

Enable Card Security Number

The Card Security Number field will be enabled on the pages where credit card information is entered for processing through this payment gateway. Once enabled, this field will be required to process an online credit card transaction.

Enable Word Verification (CAPTCHA)

Word Verification will be enabled on the payment confirmation page. Once enabled, this field will be required to process an online credit card transaction. The user will be required to retype a word that is displayed to them.

Choose your payment provider from the dropdown list. In this case, it will be the **FrontStream Gateway**.

This is typically the name that you use for this payment provider to help you remember.

Type the code that identifies you to the payment provider. For the ArgoFire payment gateway, this will be identified on your confirmation email as "User Name".

Type the password from your confirmation email here.

4. Turn on fraud prevention features. There are two different fraud prevention features that you have the ability to enable through Artez's backend. These are **Enable Card Security Number** and **Enable Word Verification (CAPTCHA)**.

To enable either of these features, click on the check boxes beside the corresponding feature. These features are HIGHLY recommended. Fraud is a common occurrence on nonprofit organization's pages, so you should enable these features to limit the threat of fraud. **Note:** Turning on these features will not completely prevent fraud; they will only limit the threat.

**Enable Card Security Number** – Click this box if you want to enable CVV2 functionality. CVV2 is a three- or four-digit value, found on the back of most credit cards, which provides a cryptographic check of the information embossed on the card. Once enabled, this field will be required to process an online credit card transaction.

**Enable Word Verification (CAPTCHA)** – Click this box if you want people to type the characters of a CAPTCHA image when making a credit card payment. This **IS** a fraud prevention feature and it is strongly advised to have this feature on at all times.

5. The **Notes** section is optional. You might use it, for example, if you have several payment gateways and want to note which bank account is linked to each gateway.

In this section, you can enable **PayPal Express Checkout** - click this box if you want to allow people to pay using their PayPal account (rather than using their credit card). If you enable this option, PayPal will be available on all pages that collect payments. Your organization must set up an account with PayPal before you can use this option. Type your PayPal username, password, and signature information. You will receive an error message if your credentials are not recognized.

**Tip:** Organizations that have PayPal Express checkout enabled have the option to enable PayPal Monthly donations. You will need to enable the option within PayPal before enabling this option.

**Tip:** If you select **Enable PayPal Express Checkout**, a new tab - the PayPal Fraud Management tab - will appear on the Configuration menu as shown below.

**Enable PayPal Express Checkout**  

If enabled, the option to pay with PayPal within the Artez system will appear on all pages that collect payments. To enable this feature, your organization must set up a PayPal account on [www.paypal.com](http://www.paypal.com) and then enter your credentials below.

\*Note, if you are using the PayPal Website Payments Pro gateway, Express Checkout is automatically enabled.

The e2rm application will adhere to the Fraud Management Filters (FMF) if setup within your PayPal account (set up on PayPal's site) For more information about FMF click [here](#).  
For help with retrieving your PayPal credentials, click [here](#).

Important note: Artez Interactive Inc. does not monitor or maintain the PayPal application.

For a list of Mobile Platforms Supported by Express Checkout, [click here](#)

Username	<input type="text"/>	*
Password	<input type="password"/>	*
Signature	<input type="text"/>	*

Enable PayPal Monthly Payments

6. Under **Credit Cards Accepted**, check the box beside each credit card that you accept. Under **Set Default**, choose a default credit card by clicking the button to the left of it. When constituents are entering credit card payments, this will appear as the default card. If you wish to accept American Express, you need to add your American Express Merchant ID number on your ArgoFire Payment Gateway Application.

**Note:** You can add multiple accepted credit cards. You can only add one default

Set Default	Credit Cards Accepted
<input type="radio"/>	<input type="checkbox"/> American Express
<input type="radio"/>	<input type="checkbox"/> Diners
<input type="radio"/>	<input type="checkbox"/> Discover
<input type="radio"/>	<input type="checkbox"/> Maestro
<input type="radio"/>	<input type="checkbox"/> MasterCard
<input type="radio"/>	<input type="checkbox"/> Visa
<input type="radio"/>	<input type="checkbox"/> Visa Debit
<input type="radio"/>	<input type="checkbox"/> Visa Delta

- Next, add in your **Payment Gateway Currency** and **Tax Receipting Currency**. To do this, click on the box beside **Payment Gateway Currency**. This box will have the default text “Australian Dollar”. Click on this to bring up a dropdown list of currencies. Choose the currency for your Internet Merchant Account. The options include Australian Dollars, Canadian Dollars, European Euro, Pound Sterling, New Zealand Dollar, and US Dollars.

If you need to accept more than one currency for an event, you will need to set up a separate Internet Merchant account for each currency.

Payment Gateway Currency:

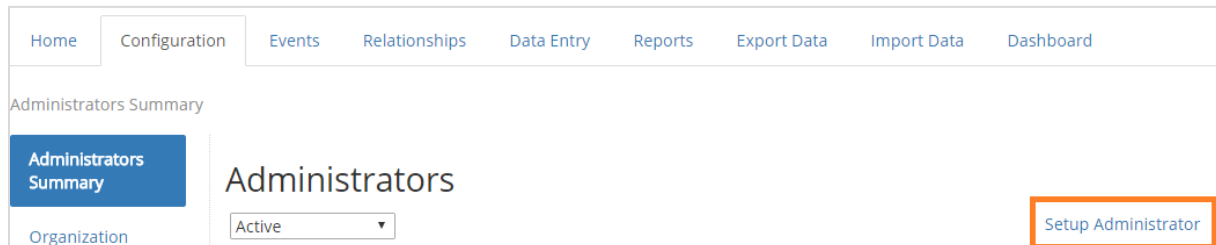
Tax Receipting Currency:

**Important:** The Gateway should have matching currencies. If you wish to have multiple currencies on your event, you are required to setup 2 gateways. The first gateway should have matching currencies, and second gateway should have the receipting currencies the same as the first gateway.

Choose which currency you would like to issue tax receipts in. To do this, click on the box beside **Tax Receipting Currency**. This box will have the default text “Australian Dollar”. Click on this to bring up a dropdown list of currencies.

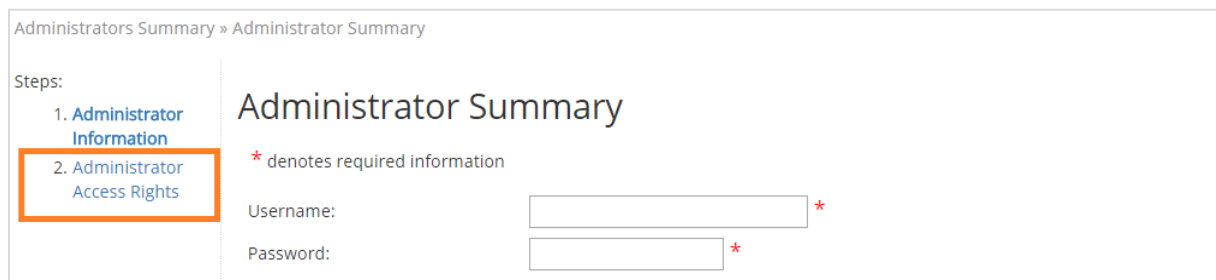
# Setting Up Your Configuration Tab - Administrators

1. From the administrator console, click on **Configuration**. Note that you can add in an unlimited number of administrators on the platform.
2. From the left menu options, click on **Administrator Summary**.
3. In the top right corner, click on the link **Setup Administrator**.



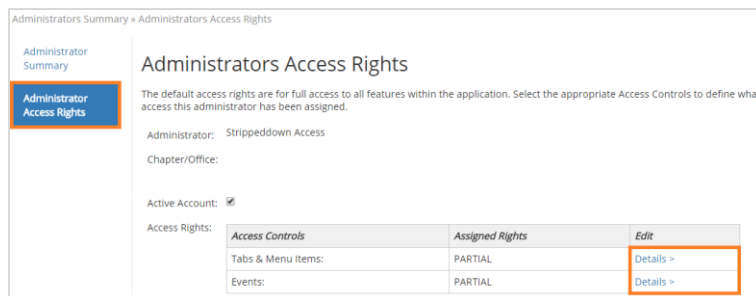
Once you are in the Administrator Summary, you will need to create a profile for this individual.

Once complete, proceed to the **Access Rights** section and set up the administrator's access permissions.



In this section, you will be able to control their access rights. The Tabs & Menu page outlines each tab that a user can be allowed access to. For example, you might want to give an accountant access to your reporting, but restrict access for them to make edits to your events.

In the Events section under **Access Controls**, you can determine which templates and tabs you are granting your administrator access. You can limit administrators to editing particular templates and therefore they would not be able to edit every template on the platform.



To do this, select the **Details** button for either Tabs & Menu Items or Events. Next, check off the corresponding boxes you wish for them to have access to.

# Setting Up Your Configuration Tab – Tax Receipts

1. From the administrator console, click on **Configuration**.
2. From the left menu options, click on **Tax Receipting**.

As a note, your Snapshot report, Purchase Items reports, and Voided Tax Receipt reports would be the reports needed for an auditor.

**Tip:** Almost always set up your Default Primary bundle. You only need to set up new bundles if your organization will be issuing receipts by location. Otherwise, just edit the default bundle instead of setting up new ones.

To set up your tax receipt bundle, follow the steps below:

1. Start in the **Tax Receipting** tab from the left-hand menu.
2. Under the **Receipt Bundle Name > Default**, select the **Details** button.

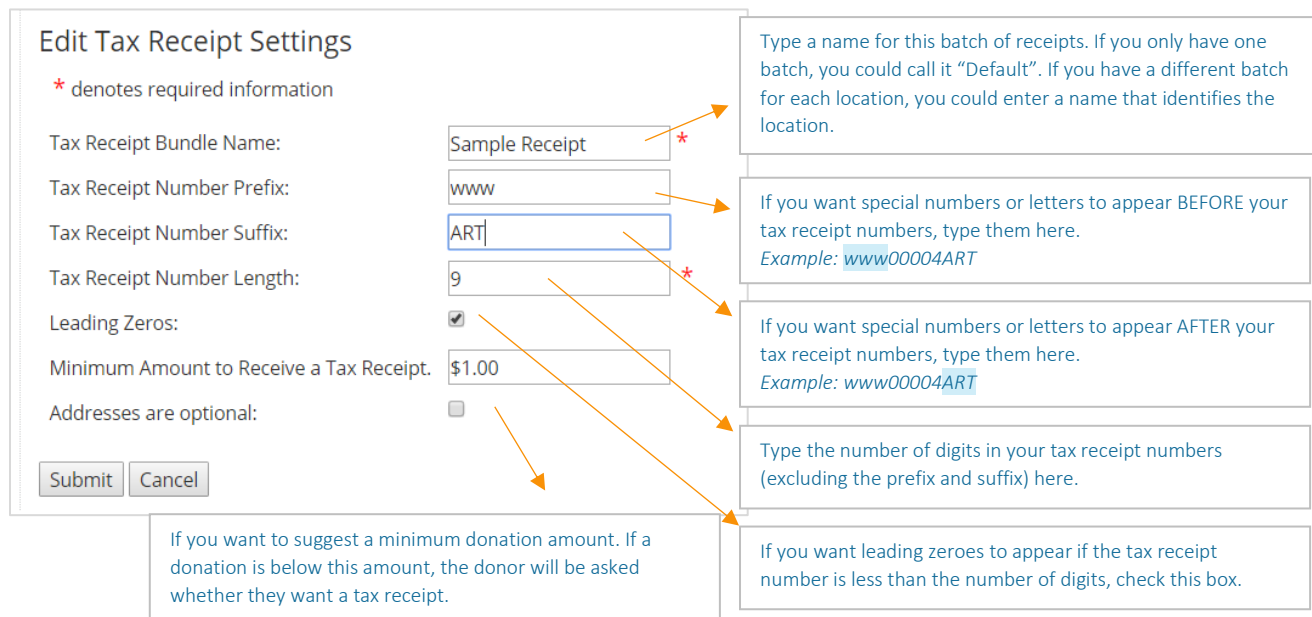


<b>Tax Receipting</b>	Receipt Bundle Name	
Title Setting	Default	Details >

3. Next, select **Edit Tax Receipt Settings**.

The following is a chart of the definitions in this section.

**Tip:** For each tax receipt bundle, you can specify whether a tax receipt can be issued without a post address. To enable, please give a check mark next to “Addresses are optional”. This is NOT recommended for Canadian charities, as a post address is mandatory on an official Canadian tax receipt.



**Edit Tax Receipt Settings**

\* denotes required information

Tax Receipt Bundle Name:  \*

Tax Receipt Number Prefix:

Tax Receipt Number Suffix:

Tax Receipt Number Length:  \*

Leading Zeros:

Minimum Amount to Receive a Tax Receipt:

Addresses are optional:

Type a name for this batch of receipts. If you only have one batch, you could call it "Default". If you have a different batch for each location, you could enter a name that identifies the location.

If you want special numbers or letters to appear BEFORE your tax receipt numbers, type them here.  
Example: `www00004ART`

If you want special numbers or letters to appear AFTER your tax receipt numbers, type them here.  
Example: `www00004ART`

Type the number of digits in your tax receipt numbers (excluding the prefix and suffix) here.

If you want leading zeroes to appear if the tax receipt number is less than the number of digits, check this box.

If you want to suggest a minimum donation amount. If a donation is below this amount, the donor will be asked whether they want a tax receipt.

4. Once you have filled in the respective fields, click **Submit**.

**Tax Receipt Blocks**

To create a new block of tax receipt numbers click the button below.

Starting Number	Ending Number	Current Number	Status	
0	100	0	Active Tax Receipt	<a href="#">Details &gt;</a>

[Setup Block of Tax Receipt Numbers](#)

5. Next, click on the **Details >** button to the right of the tax receipt with the status New Tax Receipt under the section **Tax Receipt Blocks**. Alternatively, to create a new block of tax receipt numbers, select the button **Setup Block of Tax Receipt Numbers**.
6. Choose the starting and ending numbers of your tax receipts. To expire a tax receipt that is no longer in use, select the button **Expire Tax Receipt**.
7. Click **Submit**.
8. The last step is to create your tax receipt template. To do so, click on the button **Setup Tax Receipt Template** under the section Tax Receipt Template.
9. Fill in the fields that will appear on your tax receipt template. Below is a description of some of the main fields that need to be completed.

**Tax Receipt Templates**

To create a new tax receipt template click the button below.

Name	Template	Status	
test	Official CDN Tax Receipt (English)	Active	<a href="#">Details &gt;</a>

[Setup Tax Receipt Template](#)

### Build Tax Receipt Template

From this page you can build a tax receipt template.

\* denotes required information

Name:  \*

Status:

Receipt Type:

**Official Information**

Receipt Type Copy 1:

Receipt Type Copy 2:

Registered Charity Label:

Charitable Registration Number:  \*

Revenue Agency Information:

Address:

Type a name that will identify this tax receipt template.

Choose **Active** to make the tax receipt available to attach to emails. When the receipt is no longer valid, you can change it to **Inactive**. This prevents old receipts from being sent out.

In Canada, always choose **Official CDN Tax Receipt**. This template does not allow you to change legally required wording. In the U.S., choose **Editable Receipt**. This template allows you to change the wording per your local requirements.

Enter your Charitable Registration Number or EIN.

Enter your full address here. The address length can only be four lines. If you have not used up all four lines, add in a contact phone number and/or email address on the remaining lines.

**Note:** The Value of Advantage field under Labels is only used for purchase order events. It shows the amount paid by the donor that is *not* eligible for a charitable donation receipt. If you are not using a purchase order event, you can delete this field.

Value of advantage	Value of advantage:
Amount	Eligible amount of gift for tax purposes: *
Location Issued label	Location Issued: *
Additional Text	

The **Additional Text** field is where, if you wish, you can add other information on the tax receipt by typing it here.

In the Graphics section, you can add your charity logo and official signature. The maximum recommended size for these images is 210 pixels wide by 70 pixels high.

Graphics

Logo  No file chosen \*

Signature  No file chosen \*

10. Once everything is added in, preview your tax receipt by selecting the **Preview** button in the bottom right corner. If it looks good, press **Submit**.

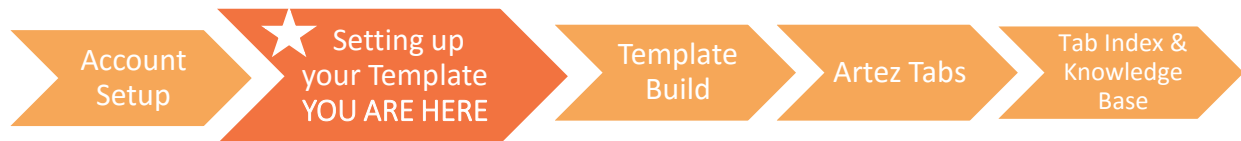
**Note:** Typically, FrontStream clients do not print duplicate copies of tax receipts for their records. We maintain a copy of all receipts within our system should you be audited. Since you have access to view all receipt details as well as a copy of the physical receipt, and we do not allow changes to be made to tax receipts post-issue (without voiding and re-issuing a new receipt), our storage will satisfy CRA requirements. You can use a Snapshot report to compare all tax receipt numbers that were issued for your organization during a specific time period. If you are missing any tax receipt numbers, you should also check your Voided Tax Receipt report to account for any tax receipts that you were issued to voided payments or subsequently cancelled.

Many of our charities produce thousands of tax receipts each year so the time and effort to produce duplicate hard-copies in house would be quite a burden. If for whatever reason you still wish to print duplicate copies of tax receipts, you can push out a duplicate tax receipt to your own email address, and then either store the electronic copy, or print and then store. The instructions to do this can be found [here](#) in the section on Issuing a Duplicate/Corrected Tax Receipt.

If you need to issue a duplicate or corrected tax receipt, refer to [this](#) section on “How to Void or Issue Duplicate/ Correction Tax Receipt”.

# Setting Up Your Template

In this next section, we are first going to determine the difference between the Donation and Tribute and Purchase Items template. When you know what template you would like to build, follow the simple steps in this section and we will get you set up! By the end of this chapter, you will have created the foundation of your page.



Artez makes creating your new template quick and easy! With the addition of our Event Setup Wizard, you will be guided through the event setup process with a series of simple questions which will impact your template's configuration. If you are unsure at any point during setup, choose an answer and you can always change any of the settings after you have created the template.

In this section, you will become familiar with:

1. Donation and Tribute vs. Purchase Template
2. Setting up your template



Before we begin, let's make sure you are using the right page and review the difference between the two templates in Artez Basic!

The screenshot shows a donation form for Frank's Foundation. At the top, there is a logo with a smiling face and the text "FRANK'S FOUNDATION CARING FOR KIDS SINCE 1960". Below the logo is the title "Frank's Foundation Donation Fundraising 2017". The form includes a paragraph of text about the foundation's mission, a "Donation Amount" section with buttons for \$10, \$25, \$50, \$100, and "Other Amount", and a "Donor Information" section with radio buttons for "Personal Donation" and "Organization Donation". There are also input fields for "Name" (First Name, Last Name) and "Contact Information" (Home, Work, Address 1).

The **Donation and Tribute Template** will allow you to create a customized donation form to accept one-time and/or monthly donations.



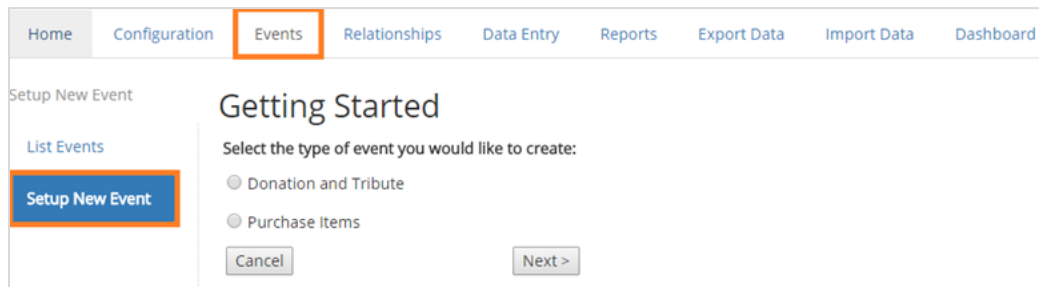
The screenshot shows a purchase page for FrontStream. The header features the "frontstream" logo and the tagline "SUPPORTING THE GOOD YOU DO". The main content area is titled "Purchase Items" and lists three items for sale: "FrontStream Brunch Tickets" (Price \$25.00), "FrontStream Branded T-Shirt" (Price \$30.00), and "Virtual Giving Tree" (Price \$15.00). Each item has a "Qty" input field and an "Add" button. The page also includes a sidebar with social media links and a footer with "Back", "Continue >", and "Cancel" buttons.

The **Purchase Template** will allow you to create a landing page where you can sell tickets to a gala, sell items for an event, or a set up a symbolic giving catalogue for holiday seasons. Click [here](#) to see a video on building a purchase page.

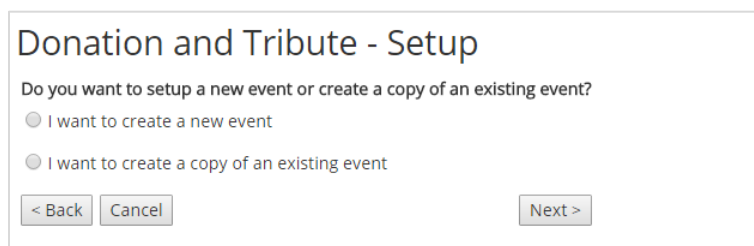


## Setting up your Template

1. Select **Setup New Event** in the left-hand column of the Events tab.



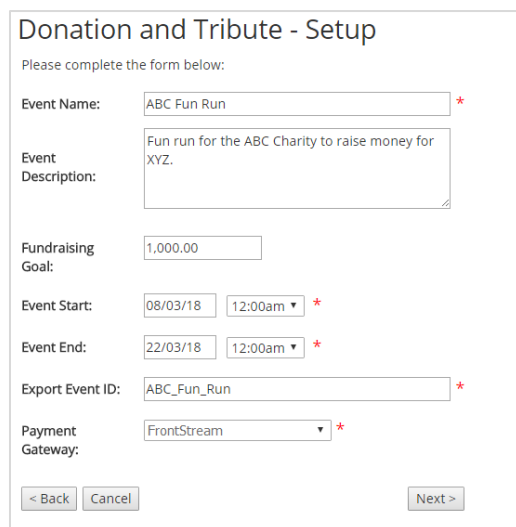
2. Choose the event that you would like to work with. With Artez Basic you have the choice between the Donation and Tribute template, or the Purchase Items template.
3. Click **Next**.
4. Next, click on **I want to create a new event** if you would like to create a new template. If you would like to use content from a past template you have created, click on **I want to create a copy of an existing event**.



5. Click **Next**.
6. Choose if you would like French and English pages or just English pages.

**Note:** English pages will not automatically be translated into French, you will need to do this manually update each French content page.

7. Click **Next**.
8. In this part, there will be a series of questions specific to your event.
  - Under **Event Name**, add in the name of your template.
  - **Event Description** will not be shown to the public, but it acts as a reminder for you in case you forget the specifics of this event.
  - **Fundraising Goal** needs to be set for you to have a fundraising thermometer shown.
  - Check the **Event Start** and **Event End** dates of your page. If your page does not have a start date and end date, just enter the current date of the year as the start date and a year far in the future for the end date.



- **Event Export ID** is the name of the event that will show in your reports.
- Select your **Payment Gateway**. If there are no payment gateways on the drop-down list, you have not added in a payment gateway. [Click here](#) to add a payment gateway.

9. Click **Next**.

10. Specify a sender name and email address. These fields will be used in all outgoing emails for your template.

11. Click **Next**.

12. In this next part, you will be asked to answer more questions related to the settings in your event. If you're unsure of which options to choose, don't worry - you can always go back and change this information later. There are no right or wrong choices, it is all personal preference whether you would like the features on or off.

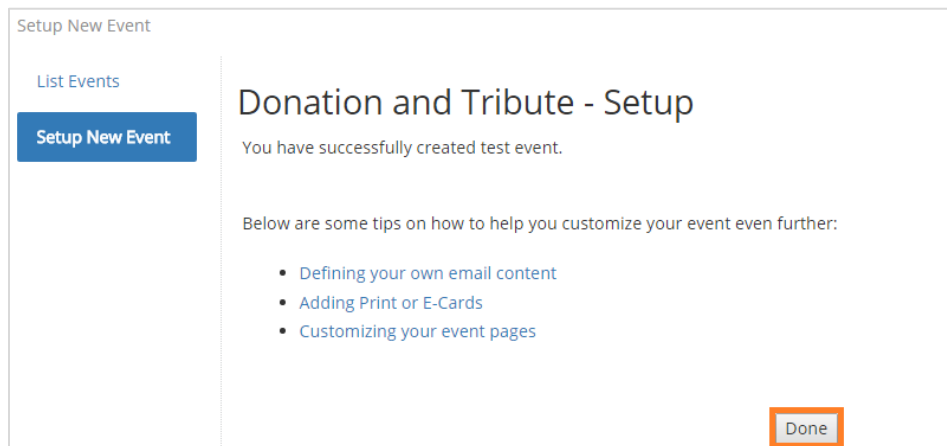
- If you enforce a minimum donation amount, the donation amount must be over this threshold for the donation to go through.
- Cover the processing fee: You can ask donors if they want to cover some of your donation transaction fees.
- Choose if you would like to issue tax receipts for donations.

13. Click **Next**.

14. Upload a header and footer for your template page. Click **Choose File** to upload an existing photo from your computer. Have your photo resized so that it is 1000 pixels wide and 270 pixels high. For Donation and Tribute templates, you will have the option to upload headers and footers optimized for mobile devices. These should be 400 pixels wide. If you do not have your photos ready, click **Skip** and you can return to this section later.

15. If you have uploaded your photos, click **Next**.

16. Success, the basics of your page are complete! This will prompt a summary of the options that you have enabled. Press **Finish**.



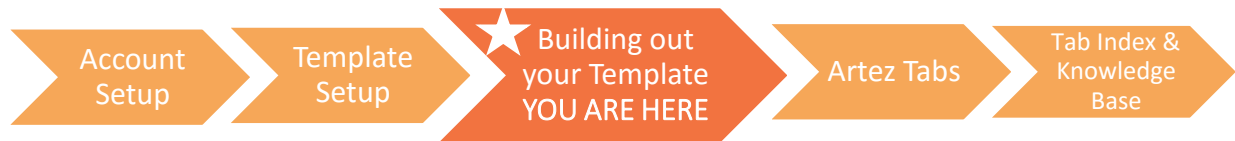
17. Click **Done**.

Now that your page outline is created, go to the **Event Summary** page in the **Events Tab**, and click **Open Public Access to Event** to see the public-facing website. Then, you can click on the link next to the Event Home Page to be redirected to the user's view. Don't worry, as of now you're the only person that has this link, so until you share it, nobody will be able to visit this page.

If you want to create a demo event to practice, you can create your demo and archive it when you're done with it!

# Building Out Your Template

Now that you've created the shell for your page, this section will work on building out and customizing your fundraiser. In this section, we will go through everything that will prepare your template for launch. We will go over recommended settings, how to add content, what emails to send out, and much more! By the end of this section, you will have a fully built Donation and Tribute or Purchase Items page.



**IMPORTANT:** Make sure that you have the setting **Enable Single Page Layout** enabled in the settings section. This feature will convert your Donation and Tribute page to our new & improved look. Without this feature enabled, your page will resemble our previous look.

In this section, you will become familiar with:

How to create your template page

## Building Out Your Template

Now that your template is set up, you can go through and fine-tune it to match your branding and voice.

## Backend and Frontend

When we refer to the backend, we are talking about what you can see as an administrator when you are signed into Artez. When we are talking about the frontend, we are talking about what the donor sees when they are visiting your page.

The photo on the left is your frontend page that donors will see. The photo on the right is the backend, and will only be seen by administrators.

Frontend of Artez

The screenshot shows the 'Frank's Foundation Tribute Page' with a blue header containing the organization's logo and name. Below the header, there is a section for 'Tribute Donation Amount' with a text input field. A checkbox is present for 'Make this donation in honour of an individual'. The 'Tribute Information' section includes a dropdown for 'Honoree name', an optional 'Message to Charity', and a checkbox for 'I would like to send a card'. The 'Donor Information' section has two buttons: 'Personal Donation' (selected) and 'Organization Donation'.

Backend of Artez

The screenshot shows the 'Event Summary' page in the Artez backend. It features a navigation menu at the top with options like Home, Configuration, Events, Relationships, Data Entry, Reports, Export Data, Import Data, and Dashboard. The main content area is titled 'Event Summary' and includes a table for 'General Information' and a 'Fundraising Summary' table.

General Information	
Event Name:	Example
Event Type:	Tribute
Event Access Status:	Open
Event Archived Status:	Active
Event Date:	Feb 13, 2017 - Feb 27, 2017
Description:	
Locations:	1
Event Home Page:	<a href="https://secure.e2rm.com/registrant/startup.aspx?eventid=218430">https://secure.e2rm.com/registrant/startup.aspx?eventid=218430</a>
<small>Note: Use the above url when you are linking from your public website to the e2rm event website</small>	

Fundraising Summary	
<small>As of Mar 22, 2017 02:55 PM</small>	
Registrants:	0 (0 Registered, 0 Pending)
Verified Amount Raised:	\$0.00
Pledged Amount Raised:	\$0.00
Total Amount Raised:	\$0.00
Fundraising Goal:	\$0.00



**Tip:** Always double-check when you make a change in the backend that it looks good in the frontend.

## Event Summary

The Event Summary page can be found on all of the templates in Artez Basic. This Event Summary page houses all of the information about your page, including your Event Name, Type, and Date etc.

To edit any of this information, click on the **Edit Information** link. The information found here is the information that you added during the event setup process.

The **Open/Close Public Access to Event** button, as mentioned earlier, allows you to open your event page up in the frontend. If you do not open it and you go to the webpage, this is what you will see:

### This Event Is Closed

**Thanks for your interest in Frontstream Purchase Template. However, this event is closed.**

Please visit us at our web site for further information.

Even if you open public access to your event, nobody would be able to visit your page unless you have shared the direct link to the website. It's a good idea when you make changes in the backend to regularly check in the frontend to see what your supporters will see.

The **Important Links** button will house the important links to your event that are clean-cut. These are the links that you should be sharing with people.

If you take a link from your web browser, it appears as:

<https://secure.e2rm.com/registant/TicketingWelcome.aspx?eventid=209082&langpref=en-CA&Referrer=https%3a%2f%2fadmin.e2rm.com%2fEventSummary.aspx>

The clean-cut link version is instead: <https://secure.e2rm.com/registant/startup.aspx?eventid=209082>

Notice how the verbiage after the number 209082 is gone? Not only is it a shortened link, but it looks a lot cleaner as well! Make sure whenever you share a link, it's from the **Important Links** section.

## Event Settings

The following are the event settings that appear in the backend of Artez.


General	
Set opted-in as the default for: Donor email permission	On the Donation page, the box for “I give permission for [organization name] to contact me by email” will be checked. Donors will have to uncheck the box if they do not want to allow email from the organization.
Set opted-in as the default for: Donor post mail permission	On the Donation page, the box for “I give permission for [organization name] to contact me by Mail (Post)” will be checked. Donors will have to uncheck the box if they do not want mail from the organization.
Enable Direct Donation	Enables donors to make direct donations to an event.
Enable Single Page Layout	<b>ENSURE THIS FEATURE IS ENABLED.</b> This will allow your page to act as both tribute and donate in the new updated look.
Donation	
Allow for donations made by an organization	Allows donors to make organizational donations.
Allow In Honor / Memory donations	Allow for donors to make donations in honor or memory of someone.
Enforce a minimum donation amount	Set a minimum amount for donations. Donations need to be equal to or greater than this amount in order to process.
Allow donor to cover the processing fee	Enables an administrator to specify a percentage or a dollar amount that will be added to a donation. Once a donor selects this option, the associated processing fee will be added to the donation amount.
Enable Tax Receipts for Organization Donations	Organizations who donate will receive a tax receipt when this is selected. When this is turned off, no tax receipts are issued to organizations.
Mobile Fundraising Settings (Only for Donation and Tribute)	
Enable mobile donations	Allow for the donation and tribute page to become mobile optimized while using your mobile device.
Purchase Items	
Enable donation option during purchase process	Allow for donors to make donations to the organization on the purchase items page.

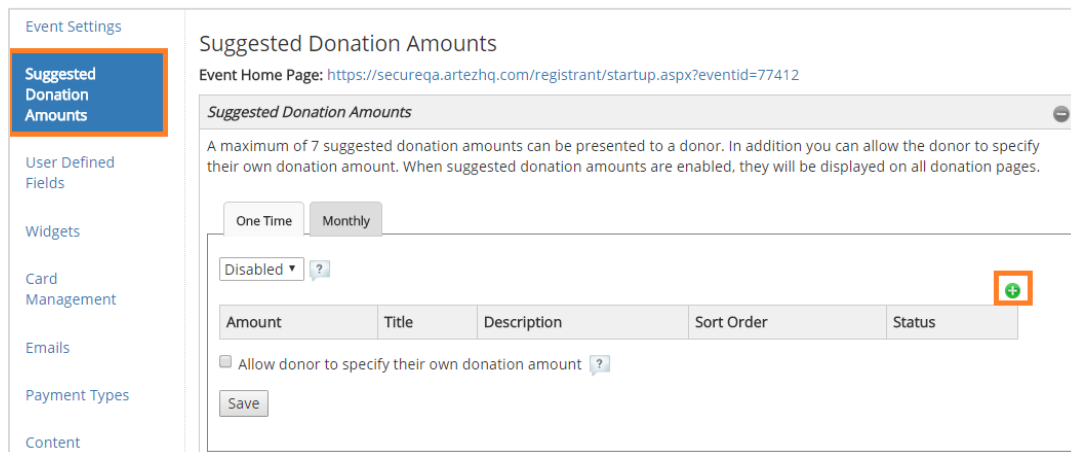


# Suggested Donation Amounts and Dynamic Donation Amounts

## Suggested Donation Amounts

Create suggested donation amounts for both One Time and Monthly donors.

1. Choose the event that you would like to work with in the **Events** Tab.
2. Click on **Suggested Donation Amounts** from the left menu options. Change to **Enabled** under Suggested Donation Amounts. If you would like to enable Dynamic Donation Amounts instead, this will need to be left as **Disabled**. Select the  icon in the right hand corner of the box:



Event Settings

**Suggested Donation Amounts**

User Defined Fields

Widgets

Card Management

Emails

Payment Types

Content


### Suggested Donation Amounts

Event Home Page: <https://secureqa.artezhq.com/registrant/startup.aspx?eventid=77412>

**Suggested Donation Amounts**

A maximum of 7 suggested donation amounts can be presented to a donor. In addition you can allow the donor to specify their own donation amount. When suggested donation amounts are enabled, they will be displayed on all donation pages.

One Time Monthly

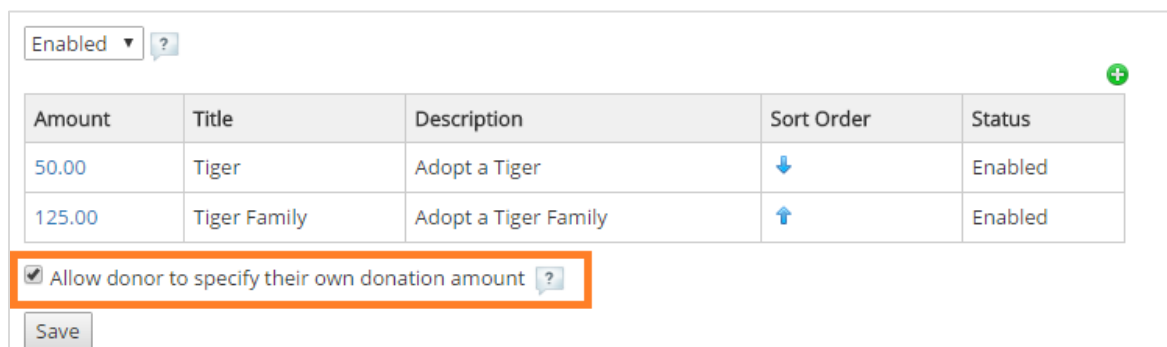
Disabled ? 


Amount	Title	Description	Sort Order	Status

Allow donor to specify their own donation amount ?

Save

3. Enter an amount, a title (optional), and a description (optional). Click **Submit**. Please note that the maximum number of suggested donation amounts you can add is seven.



Enabled ? 

Amount	Title	Description	Sort Order	Status
50.00	Tiger	Adopt a Tiger	↓	Enabled
125.00	Tiger Family	Adopt a Tiger Family	↑	Enabled

Allow donor to specify their own donation amount ?

Save

4. If you want donors to enter their own donation amount, place a check mark beside **Allow donor to specify their own donation amount**.

**Tip:** If you want to change the order of the amounts, you can do so by clicking on the arrows in the Sort Order column. Don't forget to click **Save**.

**Reminder:** If you would like to enable Monthly Suggested Donations, click on the **Monthly Tab** to add in your amounts.

## Dynamic Donation Amounts

This is an intelligent fundraising engine that reacts to the ongoing results of your campaign. As more people give through your donation form, our fundraising engine reviews your data and determines what levels to display. To enable Dynamic Donation Amounts, follow the instructions below:

1. Choose the event that you would like to work with, under the **Events** Tab.
2. From the left menu options, click on **Suggested Donation Amounts**. On the Suggested Donation Amounts page, you will find a section called **Dynamic Donation Amounts** underneath the **Suggested Donation Amounts** section.
3. Change this to **Enabled** under **Dynamic Donation Amounts**.

Suggested Donation Amounts

Event Home Page: <https://secureqa.artezhq.com/registrant/startup.aspx?eventid=77412>

**Suggested Donation Amounts**

A maximum of 7 suggested donation amounts can be presented to a donor. In addition you can allow the donor to specify their own donation amount. When suggested donation amounts are enabled, they will be displayed on all donation pages.

One Time Monthly

Disabled ?

Amount	Title	Description	Sort Order	Status
--------	-------	-------------	------------	--------

Allow donor to specify their own donation amount ?

Save

**Dynamic Donation Amounts**

Dynamic donations amounts leverage your event's donation data to determine which suggested donation amounts to display to donors. When enabled the donor will be able to choose 1 of 7 donation amounts, or enter their own donation amount by selecting "Other".

Enabled ?

Please select one of the following options to use as the base suggested donation amount: ?

Base Suggested Donation Amount: 25 ?

Use Donor Data from a Previous Event: -- Please Select -- ?

Save

**Note:** If you are enabling dynamic suggested amounts for a newly created event, you will have the option to enter a base suggested donation amount or have our algorithm leverage data from another event.

**Dynamic Donation Amounts**

Dynamic donations amounts leverage your event's donation data to determine which suggested donation amounts to display to donors. When enabled the donor will be able to choose 1 of 7 donation amounts, or enter their own donation amount by selecting "Other".

Enabled ?

Please select one of the following options to use as the base suggested donation amount: ?

Base Suggested Donation Amount: 25 ?

Use Donor Data from a Previous Event: -- Please Select -- ?

Save


4. Click **Save**.


## Purchase Items

This ONLY applies to the purchase template; please move to the next section, [User Defined Fields \(UDFs\)](#) in the eBook if you are working with the Donate and Tribute Template.

Our purchase technology allows you to sell physical goods (such as teddy bears and coffee mugs), virtual goods (a goat for a family in Ethiopia or an incubator for the children's hospital), or a combination of both. You can also use it for ticket sales for galas and events.


Our system allows you to manage events or meetings that require tickets. We also allow for “zero dollar” participants if you simply want to keep track of who is coming.

1. Click on the button **Purchase Items** on the left hand menu bar.
2. Set up **Confirmation Number Settings** by clicking on the  icon on the right of the section. These confirmation numbers will be sent to your purchasers upon successful processing.

Confirmation Number Settings				
Confirmation Number Prefix:	Confirmation Number Suffix:	Confirmation Number Length:	Leading Zeros:	
		9	no	


Save


**Tip:** Confirmation numbers are required for purchase items to appear as available.

3. Add in a Prefix, Suffix and/or pre-defined Number Length to your confirmation number (optional). If you would like the number to begin with zero, change Leading Zeros to Yes.
4. Next, add a **Confirmation Number Block** by clicking the  icon to enter your Starting Number and Ending Number:

Confirmation Number Block				
Starting Number	Ending Number	Current Number	Status	

Save

5. Click **Save** when you are finished.
6. Next, you are ready to create a Purchase Item. Click on the  icon below the **Purchase Items** section:

Purchase Items	
Purchase Items includes items that you want to make available for purchase or for sponsorship of this event.	
	

## To Create a Purchase Item:

1. In the Enabled dropdown menu, select **Enabled** to make this item available for purchase. (If an item sells out, for example, you could set this to Disabled to remove it from the page.)
2. Beside **Name**, type the name you want to call this purchase item internally.
3. Under **Remaining**, type the total quantity available. As items are sold, the system will automatically reduce this number.
4. Beside **Export ID**, type a name that will uniquely identify this item in exported data. We suggest using the same name as in the Name field unless your organization requires another naming convention.

General

Enabled ▾

Name:  \*

Language: English ▾

Attribute Name	Starting Quantity	Items Purchased	Remaining	Export ID Suffix	
Not Applicable			<input type="text"/>		

Total Purchase Amount:

Export ID:  \*

5. Once you have created your purchase item, add in the number of remaining items under the text **Remaining**. If your item has attributes, select the icon in the **Attribute Name** section to add, name, and customize the item's attributes. On the purchase page, attributes will appear in a dropdown list beside the item's quantity box; for example, the color of the shirt.

Attributes Type:

Attribute Name	Starting Quantity	Items Purchased	Remaining	Export ID Suffix		Sort Order
<input type="text" value="Blue"/>			<input type="text" value="50"/>	<input type="text" value="Blue_T"/>	Enabled ▾	↓
<input type="text" value="Green"/>			<input type="text" value="50"/>	<input type="text" value="Green_T"/>	Enabled ▾	↑_↓
<input type="text" value="Red"/>			<input type="text" value="50"/>	<input type="text" value="Red_T"/>	Enabled ▾	↑

- Beside **Attributes Type**, type the name you want to call this attribute. This name will appear to your supporters; i.e. Color.
- Under **Attribute Name**, type the name you want to call each attribute. This name will appear to your purchasers; i.e. Red, Green, Blue, etc.
- Under **Export ID Suffix**, type a name that will uniquely identify this attribute in exported data; i.e. Color.
- Under the icon, select Enabled for the items you wish to make available.

**Tip:** The Sort Order can be edited at any time.

6. The next step to this is to add in **Display Information**.

- Beside **Title**, type the name you want to call this item on the template.
- Beside **Short Description**, type the name you want to call this item on the template.
- Beside **Admin Description**, use this field if a longer, secondary description is also available.
- **Image**: Click the **Browse** button, locate the folder the image is in and click the file name, then click **Open**. The path and file name now appear in this field. Use JPG or GIF images about 150 pixels width by 100 pixels height.
- Beside **Unit Price**, type the price of the item. If you type a price of zero, be sure to put a checkmark beside **Verify A Price Of Zero** for this item. Otherwise, the system will not accept it.
- Beside **Tax Receipt Amount**, type the amount that is eligible for a tax receipt.

**Display Information**

Title:  \*

Short Description:  \*

Admin Description:

Image:  download.png




Image will be uploaded after clicking Save.

**Note:** Recommended size for best quality is 200 x 134 (JPEG, PNG, GIF)

Unit Price:  \*

Verify a price of zero for this item

Tax Receipt Amount:

7. Enabling E-cards (This section is optional)


**Note:** You may want to send out ecards if you are making a purchase on behalf of or for someone, or donating in celebration of someone. For example, you purchased a symbolic gift for a friend's birthday and want to send him/her an ecard to let them know of this gift.

- Beside **Card Title**, type a name for this card that will identify it in the list of e-cards.
- Beside **Default Card Message**, type the message that will appear on this card.
- Beside **Card Description**, type other information as required. This is optional and does not appear to donors or participants.
- Beside **Card Image**, click **Browse** and choose an image to appear on the e-card. (The image must be a JPG or GIF image with a maximum width of 640 pixels and a maximum height of 480 pixels.)
- Beside **Card Layout**, choose whether to have the card displayed Portrait or Landscape style.
- If you want to preview the card, click **Preview**.

8. Creating an E-Ticket Template (Optional) **Note:** You will typically use the E-Ticket function if you are hosting an event or gala where you are selling tickets.

**Tip:** Don't forget to enable the E-Ticket Template Email for your purchase template. You will not be able to enable the E-Ticket until the E-Ticket email is enabled in the Emails section.

To create an E-Ticket template:

- Under **Ticket Number Settings**, click the icon on the right if you wish to include a Prefix, pre-defined Number Length and/or Leading Zeroes to your ticket number. This step is optional.
- Under **Ticket Number Block**, click the  icon to enter your Starting Number and Ending Number. This step is required.

Ticket Prefix	Length	Leading Zeros
	8	No

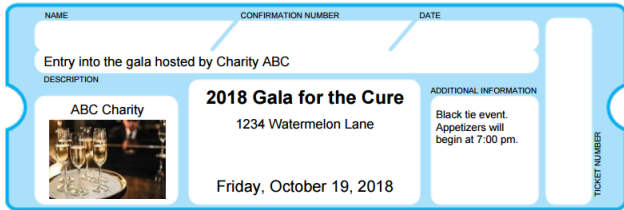
  

Starting Number	Ending Number	Current Number	Status
1	300		New

- Press **Save** at the bottom of the page. You will not see the option to **Edit E-Ticket Template** until the purchase item is saved. Once you have pressed save, you will be taken back to the main Purchase Items screen. Re-click on the purchase item that you wish to add an E-Ticket for.
- Choose **Edit E-Ticket Template** on the purchase item to edit the PDF template that will be attached to the ticket email. Please ensure that your organization and event logos fit into the specified sizing for optimal display.

**Note:** If you would like to create your E-Ticket in French, make sure to change the language at the top of the page.

To view your E-Ticket before you save, press **Preview**. This will download a copy of your E-Ticket into PDF form as shown below.



- If you are happy with the layout of your E-Ticket, press **Save**.
- Make sure that you **Enable** the E-Ticket under the E-Ticket Details. If enabling the E-Ticket is not an option, chances are you still need to enable the E-Ticket email under the Emails section. This can be found [here in the eBook](#).

Your E-Ticket is now complete!

#### 9. Finalizing Business Rules

- Beside **Fulfillment Email Address**, type the email address(es) of a person(s) at your organization who will need to receive notification that the item has been purchased.
- Beside **Max Qty Per Order**, enter the maximum number of items that can be purchased at one time.

If you have enabled E-cards:

- Enable **Mass Sending of E-Cards** (up to maximum of 100 email addresses) if you have enabled E-cards and will allow purchasers to mass send.
- Beside **Max and Default Qty E-Cards per Unit**, type the maximum and the default number of e-cards you will allow purchasers to send per item.
- When finished, make sure you click **Save**.

### Add or Edit E-Ticket Template

Please ensure that your images fit into the following sizes for optimal display  
 Header: 468 x 72 pixels (6.5 x 1 inches)  
 Footer: 468 x 54 pixels (6.5 x 0.75 inches)  
 Logo: 200 x 200 pixels

Language:

Template:

\* denotes required information

Charity Name:  \*

Ticket Description:  \*

Event Name:  \*

Address:  \*

Event Date:

Additional Text:

Logo:  download.jpg  
 200 x 200 pixels \*

Header:  No file chosen  
 468 x 72 pixels

Footer:  No file chosen  
 468 x 54 pixels

Printing:

#### Business Rules

Fulfillment Email Address:

Max Qty Per Order:  \*

Enable Mass Sending of E-Cards (up to maximum of 100 email addresses) ?

Max Qty E-Cards Per Unit:  \* ?

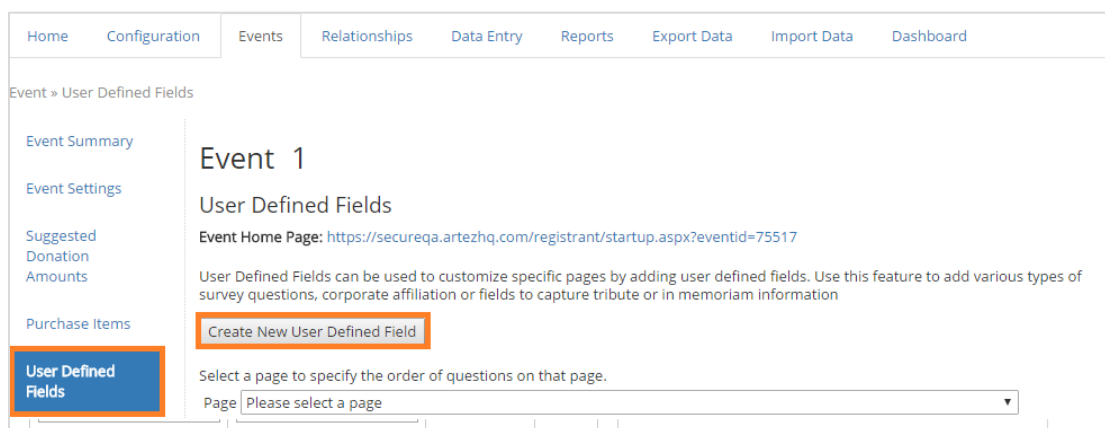
Default Qty E-Cards Per Unit:  \* ?

## User Defined Fields (Creating Questions/Surveys)

Create additional fields to collect information from donors or purchasers. Use this feature to add various types of survey questions, corporate affiliation, or fields to capture tribute or in memoriam information.

To set up a User Defined Field, follow the instructions below.

1. Click on the **User Defined Fields** tab from the left menu.
2. Click on the button **Create New User Defined Field**.



Fill out the appropriate fields:

- Beside **Field Name**, type a name for the new field. Choose a name that will help you remember what the question is, in case you want to change it later. (If you don't type a meaningful name, you won't be able to find the field again.)
- Beside **Description**, type a description of the field. (Optional)
- Beside **Type**, choose how the person will answer – options include selecting a checkbox, selecting a date, choosing from a dropdown list, selecting a radio button, or by typing freeform into a single line or multiple line input box.
- Beside **Data Transfer ID**, type a unique identifier for this question that will appear in your reporting. (We suggest that you use whatever you typed in the **Field Name** field.)
- Beside **Mandatory**, choose **Yes** if you require the person to answer this question, or **No** if the question is optional.
- Beside **Capture on Pages**, click to make a check mark beside each page you want the question to appear on.
- Beside **Question**, type the question exactly as registrants or donors will see it.



If the answers will be in a *dropdown menu* or they are *radio buttons*, there are some additional steps:

- Below **Order**, type the order in which this answer should appear. (e.g., 1 appears first, 2 appears second, etc.)
- Below **Answer Text**, type the text of the answers as registrants or donors will see them.
- Below **Opt-in**, click to put a check mark in the box if you want this answer to be selected by default (“opted in”). This only applies to check boxes.
- Below **Data Transfer ID**, type a unique identifier (Export ID) for this answer.
- If you want to add a follow-up question if people choose a certain answer, click **Add sub item** and repeat the same process. Example: A question asks whether registrants would like a T-shirt. If they answer Yes, you could create a sub item to ask the size.

Type: Check Box

Language English ▾

Question  \*

This type of user defined field requires one or more answers. Please note that a value is required for the Answer Text and Data Transfer ID fields for every answer entered.

Order	Answer Text *	Opt-in	Data Transfer ID *	Hide
<input type="text"/>	<input type="text"/> Add sub item	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/> Add sub item	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/> Add sub item	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
<a href="#">Add more answers</a>				

**Publish UDF Answers:** Choose if you wish to have UDF answers displayed on Personal or Team pages.

**Tip:** The **Hide** column allows you to hide one of the answers from appearing in the list without deleting it.

# Widgets

In the Widgets section, you can enable Social Network Settings as well as Google Analytics.

To enable any of these widgets, click on the **Manage** button under the respective categories.

**Bonnie's Apple Picking Event**

Widgets

Event Home Page: <https://secureqa.artezhq.com/registrant/startup.aspx?eventid=77480>

Choose the widget to be customized:

- Social Network Settings  
Enable Social Network sharing and Facebook Connect to allow your supporters to share your cause on social media sites.  
Manage
- Google Analytics  
Enable web site usage to be gathered using Google Analytics.  
Manage

## Social Network Settings

This allows you to enable Social Network sharing and Facebook connect, to allow your supporters to share your cause on social media sites.

The AddThis Settings let donors share your cause on their social media accounts. You can customize the messages that will populate these boxes.

To Enable the AddThis Setting:

- Click **Enabled** under the Add This Settings section.
- If you have an AddThis account ID, you can enter it here (optional).

Add This Settings

Enabled

AddThis Account ID  
123456789

What page(s) would you like this displayed on?  
 All the pages

Preview

Once you have enabled the AddThis setting, you can customize your messages that will be prepopulated when your supporters share your cause on certain social media sites.

Under the section **AddThis for Twitter**, create a unique message that friends of your supporters will see online. This message will be included along with a link to the page.

AddThis for Twitter

Twitter Message (52 character limit)  
Help me support #MondayFunday  
To help this cause, click below!

Under the section **AddThis for Facebook**, create a unique message that your supporters will see when this link is shared on Facebook.

Under the **Title**, add in your organization's name. Key words like %EventName% or %OrganizationName% will automatically fill in with your event or organization name. No need to do the work yourself! Under the **Description**, think of a short sentence that will help inspire others to donate to your cause. You can add an image that will appear in this link as well. The recommended image size is 200 x 200 pixels.

Don't forget to click **Save** when you are finished!

## Facebook Settings

We offer an event fundraising app that runs entirely inside Facebook – the Facebook Friendship Powered Fundraising (FPF) App. Running inside means never leaving the familiarity and comfort of your Facebook session. And because the app is fully integrated on multiple channels, it works perfectly on your mobile, tablet, or desktop device! Event participants and their friends can drop in, track progress, share with more friends, and donate with one click when it's top of mind and the moment's right.

**How it works:** The Facebook Friendship Powered Fundraising (FPF) pages display content which is hosted on our servers. To enable this, under the Widgets tab of your event, click on Social Network Settings, and from there select “Enabled” under the section Facebook Settings.



## Google Analytics

Setting up this feature enables you to link your event websites to your Google Analytics account. This allows you to track information about people who visit your website in order to optimize your Google AdWords.

For example, you can learn the number of visitors, visitor path, conversion rate, and more. You can also learn what kind of browsers your donors are using and see where they are arriving from. This is how your website traffic information might appear on an easy-to-use Google dashboard accessed through [www.google.com/analytics](http://www.google.com/analytics).

# Card Management

Allow donors to send e-cards to their family and friends.

1. Click on the **Card Management** tab in the left hand menu.

The screenshot shows the 'Card Management' settings page for a user named 'tester'. The left-hand menu is visible with 'Card Management' highlighted. The main content area includes the following text and options:

- Event Home Page:** <https://secureqa.artezhq.com/registrant/startup.aspx?eventid=77480>
- Card Settings** (Section Header)
- Enable and create Print and/or E-Card templates to allow your Participants and Donors to send cards to their family and friends. Once you enable the card template setup below, you can create a collection of cards for the donors to choose from.
- The E-Card functionality is **enabled below**.
- You must enable the **Notification - Donation E-Card** e-mail to complete the setup.
- Please Note:** If you choose to not create an E-Card template, but have the **Notification - Donation E-Card** email enabled, then our default card template will be used.
- Enable Print Cards
- Enable E-Cards
- I want to allow Participants/Donors to upload their own image.
- Enable Mass Sending of E-Cards(up to maximum of 100 email addresses) [?](#)
- Save** button

2. Select **Enable Print** and/or **Enable E-Cards**. (This question will be shown to donors on the donate page). Please note this will not automatically send print cards to donors; instead, this will capture the data, and then it is up to you the organization to send out the print cards manually.
3. If you want to allow donors the option to upload their own image, click on **I want to allow Participants/Donors to upload their own image**. If this is disabled, donors will only be able to send e-cards with designs uploaded by your organization.
4. If you want to allow for a donor to send up to 100 e-cards at a time, check the box **Enable Mass Sending of E-Cards**.
5. Once you are finished, you must enable the Notification-Donation E-Card email to complete the setup. You can learn more about enabling this feature in [Emails](#) section.

Once you have set up the e-cards, you will need to create the **E-Card Template**.

Still in the Card Management tab on the left-hand menu, under **Card Library**, click on the icon in the bottom right corner:

The screenshot shows the 'Card Library' section. It includes a 'Please Note' message and a 'Card Template Details' section with a plus icon in the bottom right corner.

- Card Library** (Section Header)
- Please Note:** If you choose to not create an E-Card template, but have the **Notification - Donation E-Card** email enabled, then our default card template will be used.
- Card Template Details** section with a plus icon in the bottom right corner.

### Card Settings

Create/Edit Card

This page allows you to add or edit your default Print and/or E-Card template. You can upload your image by clicking on the "browse" button below. The accepted file types are jpg and gif.

\* Available as a: (please select at least one)

Print Card

E-Card

\* Available for: (please select at least one)

General Donation

In Honour

In Memoriam

Card Title:  \*

Print Card Export ID:  \*

Default Card Message:  \*

Card Description:

Card Image:  Browse... \*

(Images larger than 700px will automatically be resized.)

Card Layout:

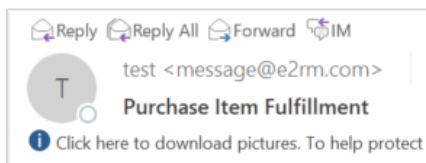
- Choose if you would like this card **Available as a Print** or **E-Card**.
- Choose what you would like this card **Available for**.
- Beside **Card Title**, type a name for this card that will identify it in the list of e-cards.
- Beside **Default Card Message**, type the message that will appear on this card.
- Beside **Card Description**, type other information as required. This is optional and does not appear to donors or participants.
- Beside **Card Image**, click **Browse** and choose an image to appear on the e-card. (The image must be a JPG or GIF image with a maximum width of 640 pixels and a maximum height of 480 pixels.)
- Beside **Card Layout**, choose whether to have the card displayed as Portrait or Landscape style.
- If you want to preview the card, click **Preview**.

## Emails

You can edit the content and branding of your emails that send to donors and/or purchasers.

### Manage Reply To & Sender Name

First thing you will need to do when creating an email, is make sure that you have properly set up your Reply To & Sender Name. Each email that sends from Artez will send from the [message@e2rm.com](mailto:message@e2rm.com) email address. Although the email address is set in stone, the **Sender Name** is the name that is associated with the email. You could put the name of your organization so it is recognizable, or the contact person at the organization that oversees these donations in this field. In this photo below, the sender name how it appears to recipients is “Test”.



The **Reply To** field is the email address that the donor can click “reply to” on the email and it will auto populate to send to this recipient.

To manage these fields, click on the **Emails** tab in the left hand menu, and select “**Manage Reply To & Sender Name**”.

### Email Layouts

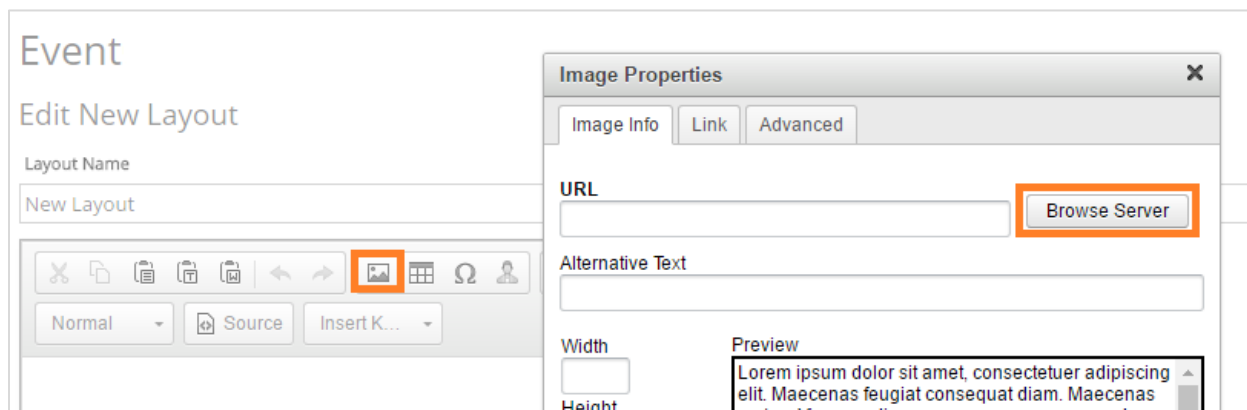
In this section, you can create a custom email layout that you can apply automatically to the emails that you send out to your email list.

To create a new email layout:

1. Click on the **Emails** tab in the left hand menu.
2. Click on the **Manage Layouts** button in the top right hand corner
3. **Create New.**

To add a header or footer image to your email layout, click on the image icon in the toolbar. Images with a 600 pixel width are recommended for optimal results.

Next, click on the **Browse Server** button to upload an image. You can save multiple images in your gallery. You may need to adjust the width of your image to fit the email to 600 pixels. When you have uploaded this properly, press **OK**.



This is a pre-saved email template, meaning the fonts, colors, and heading sizes that you choose on this layout, will be shown in your future emails. To automatically adjust the text for each heading field in your emails, click on **Show Advanced Options** on the bottom of the page. From here, you can preview the look of each title or field that will show in your emails.

To set this email template as your default email template, click on the button **Set as default English layout** in the bottom right-hand corner.

## Email Management

Below are the emails that can be enabled in the purchase template. To enable these emails, you have to click on them and then check off the button on the left hand side. They will turn green when they are enabled.

Event » Email Management

Event Summary: Manage Reply To & Sender Name | Manage Layouts | Create a custom email

Event Settings: Frank's Foundation Tribute Page 2017

Email Management

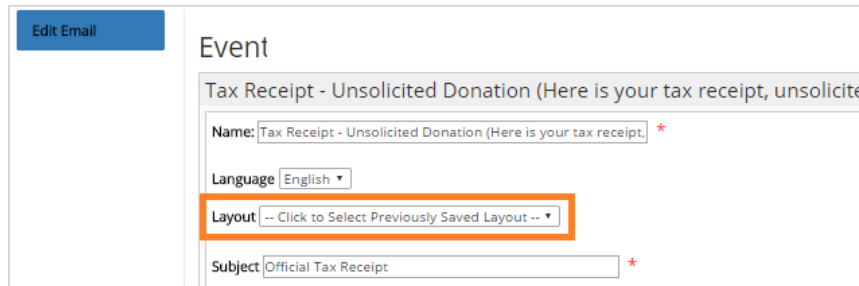
Event Home Page: <https://secure.e2rm.com/registrant/startup.aspx?eventid=221211>

Check the checkbox beside the email name to enable it. Click on the email name to edit the message content of that email.

Organizational Messages to One-Time Donors:	
<input checked="" type="checkbox"/>	Donation E-Card (You've been sent an e-card)   Default Content
<input checked="" type="checkbox"/>	Donation E-Card (Confirmation Email to E-Card sender - Your E-Card has been sent)   Default Content
<input checked="" type="checkbox"/>	Thank You - In Honour of Donation (Thanks for your donation, In Honour)   Default Content
<input checked="" type="checkbox"/>	Thank You - In Memory of Donation (Thanks for your donation, In Memory)   Default Content
<input checked="" type="checkbox"/>	Thank You - Unsolicited Donation (Thanks for your donation, unsolicited)   Default Content
<input checked="" type="checkbox"/>	Tax Receipt - Unsolicited Donation (Here is your tax receipt, unsolicited)   Custom Content
<input checked="" type="checkbox"/>	Tax Receipt - Correction (Here is your new tax receipt, corrected)   Custom Content
<input checked="" type="checkbox"/>	Tax Receipt - Duplicate (Here is your duplicate tax receipt)   Default Content
Organizational Messages to Monthly Donors:	
<input type="checkbox"/>	Thank You - Monthly Unsolicited Donation (Thanks for your monthly donation, unsolicited)
<input type="checkbox"/>	Monthly Tax Receipt - Unsolicited Donation (Here is your annual tax receipt, unsolicited) ⚠
<input type="checkbox"/>	Monthly Tax Receipt - Correction (Here is your new annual tax receipt, corrected) ⚠
<input type="checkbox"/>	Monthly Tax Receipt - Duplicate (Here is your duplicate annual tax receipt)
Organizational Messages to Administrators:	
<input type="checkbox"/>	Admin Notification - New Monthly Plan ⚠
<input type="checkbox"/>	Admin Notification - New Sponsor ⚠

If you don't want to use your new layout for each email, you will have to go into each email and change this manually. Once you are in the correct email template, click on **Layout >** and select the layout that you would like to apply to this email.

If you would like to add a sender name and reply to email addresses in any of your emails that is different from the master, click on the email template. Select **Show Additional Options** and enter a name in the Sender Name field as well as an email address in the Reply to Email Address. You will need to manually enter in these fields for all emails EXCEPT for the emails regarding e-cards.



The screenshot shows the 'Event' email template editor. The 'Layout' dropdown menu is highlighted with an orange box. The form includes fields for Name, Language (English), Subject (Official Tax Receipt), and a highlighted Layout field with the text '-- Click to Select Previously Saved Layout --'.

### Donation E-Card (You've been sent an e-card)

If you have enabled e-cards in the previous section, this is where you need to enable the emails that correspond with this feature. Enabling this sends out an email to the recipient specified by the donor when the donor completed the donation.

### Purchase E-Card (You've been sent an e-card)

If you have enabled e-cards in the previous section, this is where you need to enable the emails that correspond with this feature. Enabling this sends out an email to the recipient specified by the purchaser when the purchaser completed the purchase.

### Purchase Confirmation

Emailing this email will send confirmation emails when an item is purchased.

**Note:** Make sure you add your organization name into the section [INSERT ORGANIZATION NAME]. This is not a keyword, and will not prepopulate on its own.

### E-Ticket

Enable this email if you want to send E-Tickets out. This email will confirm the event details and will attach a copy of the E-Ticket. This email must be activated for the E-Ticket to be enabled. Jump to this section on how to add [content into your e-tickets](#).

### Refer a Friend

This is the email that will go to referred email addresses and contacts to inform them about items they may be interested in on the Purchase Items template.

### Thank You – Unsolicited Donation (Thanks for your donation, unsolicited)

This is the email that will be sent out to thank donors for their contribution.

### Tax Receipt – Unsolicited Donation (Here is your tax receipt, unsolicited)

This is the email that will have the tax receipt attached. Note: this email template is orange until you have attached a tax receipt as shown below. To attach a Tax Receipt Template, click on the email template, and under Tax Receipt Template, select the receipt you would like to use from the dropdown menu.



<input type="checkbox"/>	Tax Receipt - Unsolicited Donation (Here is your tax receipt, unsolicited) ⚠
<input type="checkbox"/>	Tax Receipt - Correction (Here is your new tax receipt, corrected) ⚠

**NOTE:** The email Thank You and Tax Receipt are two separate emails. To limit the number of emails your donors receive, you might wish to combine the content from the two emails into one and only enable the tax receipt email.

### Tax Receipt – Correction (Here is your new tax receipt, corrected)

If a donor requests a new tax receipt, this is the email template that will go along with their corrected receipt. Note: this email needs a Tax Receipt Template attached.

### Tax Receipt – Duplicate

If a donor requests a duplicate tax receipt, this is the email template that will go along with their duplicate receipt.

### Admin Notification – Order Confirmation

This is a notification that will be sent to administrators when an item has been purchased. All of the purchase information will be included in this email.

### Admin Notification – New Sponsor

This is a notification that will be sent to administrators when the page has received a new donation. Note: you will need to add in the recipients’ email addresses that you would like to receive this notification. If you only want to be notified of donations over a certain amount, add in the specified amount into the **Minimum Donation Threshold**. For example, if your administrators only want to be notified of donations of \$100 and higher, type in "100" into the field **Minimum Donation Threshold**.

### Creating a Custom Email

If you would like to send an email to recipients that are not on the list, click on the button “**Create a custom email**” in the top right hand corner of the page.

Once in this section, add the name of the email (how you will remember it), the description (brief description of this new custom email), the layout (if you've previously created any saved layouts), the subject (the subject line that will appear when the email sends to the recipients), and the context in the email.

Event Summary

Event Settings

Suggested Donation Amounts

User Defined Fields

Widgets

Card Management

Emails

Manage Reply To & Sender Name
Manage Layouts
Create a custom email

## Frank's Foundation Tribute Page 2017

### Email Management

**Event Home Page:** <https://secure.e2rm.com/registrant/startup.aspx?eventid=221211>

Check the checkbox beside the email name to enable it. Click on the email name to edit the message content of that email.

<input checked="" type="checkbox"/> <i>Organizational Messages to One-Time Donors:</i>	
<input checked="" type="checkbox"/> Donation E-Card (You've been sent an e-card)	Default Content
<input checked="" type="checkbox"/> Donation E-Card (Confirmation Email to E-Card sender - Your E-Card has been sent)	Default Content
<input checked="" type="checkbox"/> Thank You - In Honour of Donation (Thanks for your donation, In Honour)	Default Content

As before, you can add an email sender name under **Additional Options > Sender Name**. To add an email address to reply to, go to **Additional Options > Reply to Email Address**.

Under the section Email Recipients, you can add in criteria that must be met for this email to be sent. Choose your field from the dropdown menu. Choose what condition must be met from the dropdown menu and the value you would like it to include.

**Email Recipients**

Only Email recipients that have opted to allow the organization to contact them by Email

What filter condition(s) must the recipient meet? [?](#) [+ Add New Rule](#)

Field	Condition	Value
Donation Amount	Greater Than or Equal	

[Preview Results](#)

When would you like to send this Email? [?](#)

Dec 14 2016 4:45 AM  PM

I would like this Email to be sent on regular intervals

For example, if you would like to send this email to donors only if they have donated more than \$500, the condition would be set as Condition: Greater Than, the Value would be 500, and the Field would be Donation Amount.

If you would like to send this email out only to a specific city, change the conditions to Field: Zip/Postal Code and the Value with the letter or number of the corresponding zip/postal code.

To create more than one rule, select the [+](#) icon button **Add New Rule**:

**Email Recipients**

Only Email recipients that have opted to allow the organization to contact them by Email

What filter condition(s) must the recipient meet? [?](#) [+ Add New Rule](#)

Field	Condition	Value
Donation Amount	Greater Than or Equal	

Specify the date and time that you would like the email to send on. If you would like this email to be recurring, select the button "I would like this Email to be sent on regular intervals".

## Payment Types

In this section, you can set up one-time or monthly credit card payments for donations and registrations.

**Tip:** You will not see monthly payment types unless you have set up a monthly donation plan for your organization.

Payment Type	Payment Frequency	Status	
Credit Card	Monthly Payments	Disabled	Details >
Credit Card	One Time Payment	Enabled	Details >
EFT Payment Type	Monthly Payments	Disabled	Details >
EFT Payment Type	One Time Payment	Disabled	Details >

An **EFT Payment Type** stands for Electronic Funds Transfer. If you enable this payment type, donors will submit their bank account information voluntarily if they would like, and then this data will be processed offline.

**Please note:** This is a format for Canadian clients; there is no way to change the input format for U.S. clients. EFT Payments are not recommended as it adds more manual work to the process. The charity is in charge of following through with EFT payments, not FrontStream.

To enable a payment type:

1. Click on the corresponding **Details** button beside the payment type that you wish to enable.
2. Once you have selected the details button of the payment type to be enabled, check off the box beside **Enabled**.
3. Beside **Name**, type the name you want this type of payment to be shown on the donation page.
4. Click **Submit**.

Event Payment Type Summary

Payment Purpose : Donation

Payment Type : Credit Card

Payment Frequency : One Time Payment

Enabled:

Language : English

Name :

Description :

**Tip:** Monthly Payments require monthly emails to be enabled

# Content

The content tab allows you to add, edit, and customize the content that appears on the frontend of each page of your template.

By pressing the **Expand All** button in the top right corner, you can view all of the pages that will be shown on the frontend of your template. Each form in the FrontStream system utilizes numerous content pages.

**Tip:** Expand these pages and go one by one through them to make sure you don't miss any content. This section is extensive and it is easy to skip a page accidentally.

To add, edit, or customize the content in your frontend, follow these steps:

1. Click the **Content** button in the left-hand menu.
2. Press **Expand All** to view these items. They are automatically grouped together and it is not necessary to expand this section; however, this will give you a better idea of how these pages are organized. You can also click on the section you want to work with to expand it.

The list of items in the content section will vary depending on if you are working with the donation and tribute or purchase items template.

<input type="checkbox"/> Enable all pages for editing and hide help icons <span style="float: right;">Expand All</span>	
A	Donation & Search <span style="float: right;">+</span>
B	Mobile Donation <span style="float: right;">?</span>
C	E-Card <span style="float: right;">+</span>
D	Other <span style="float: right;">+</span>
E	Microsite <span style="float: right;">+</span>
<b>Mass Update Content</b>	
Original Content:	<input type="text"/> *

For access to all the content pages at once without enabling the event settings, click the box beside **Enable all pages for editing and hide help icons**. This will allow you to edit the content on those pages but does not automatically enable those pages in your event.

For those pages requiring additional configuration, click the “?” beside the link for more information.

To help you keep track of what you have changed, “Default” appears beside the pages you have not yet customized. “Custom” will indicate changes have been made.

3. Mass update content

Enter the original content you wish to replace, as well as the replacement content.

If you want to replace only specific case sensitive instances of original content (“Event” and not “event”), then ensure that you check off the **Match case** checkbox.

You will be provided a list of suggested changes and the option to cancel or proceed.

#### **Advanced Language Options:**

To add French language to your event, click French and Add Language. All content will need to be customized in English and French.

#### 4. Select a page to Edit and Preview

Edit and Preview can also be referred to as a WYSIWYG (What You See Is What You Get).

Selected content pages will provide you with a Scenario option. Select the dropdown to view what the page will look like in different scenarios. For example, a donation form has two scenarios:

**Solicited:** Displays the donation form as it will appear when donors are sponsoring an individual or team.














**Unsolicited:** Displays the donation form as it will appear when donors choose a General Donation.

**Tip:** To move to the Previous or Next content page, click the buttons as highlighted below. To edit content in the preview window, simply make your changes directly in the window provided.

The toolbar above the WYSIWYG will allow you to make formatting changes. Simply highlight the content you wish to format and click the appropriate button. An explanation of the table is below.

Don't forget to save your changes.

The toolbar buttons to customize your content are detailed below:

	Select the text you would like and then click this button to make it <b>BOLD</b> .
	Select the text you would like and click this button to make it <i>italicized</i> .
	Select the text you would like and click this button to underline it.
	Click this button to add a link, usually to another webpage or email address.
	Select some text and click this button to remove formatting that you added and return to the default appearance.
	Select some text and click this button to change the colour of the selected text.
	Select some text and click this button to add background colour behind the selected text.
	Click this button to add a border to the selected button.
	Click this button to change the width of the border on the selected button.
	Click this button to paste text from Microsoft Word.
	Click this button to go to full browser mode.
	Select some text, and click the dropdown arrow to choose font type.
	Select some text, and click the dropdown arrow to choose a font size.

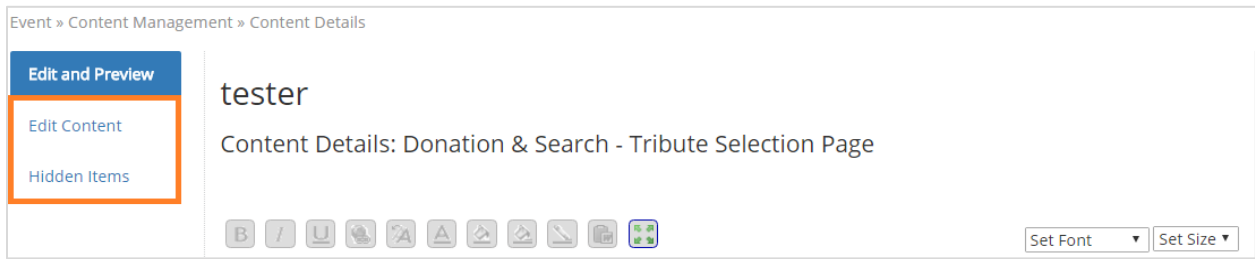
To hide one of the input fields on the page, move your cursor over the field. When a small floating menu appears, click **Hide**.

If you want to change whether an input field is required, or displays an error message if the donor does not fill it in, move your cursor over the field. When a small floating menu appears, click **Turn Required On** (or **Off**, as the case may be) or **Error Message**.

**Tip:** Many of the top-level functions in the **Edit and Preview** can be found in more detail in the **Edit Content and Hidden Items** menu options (see below).

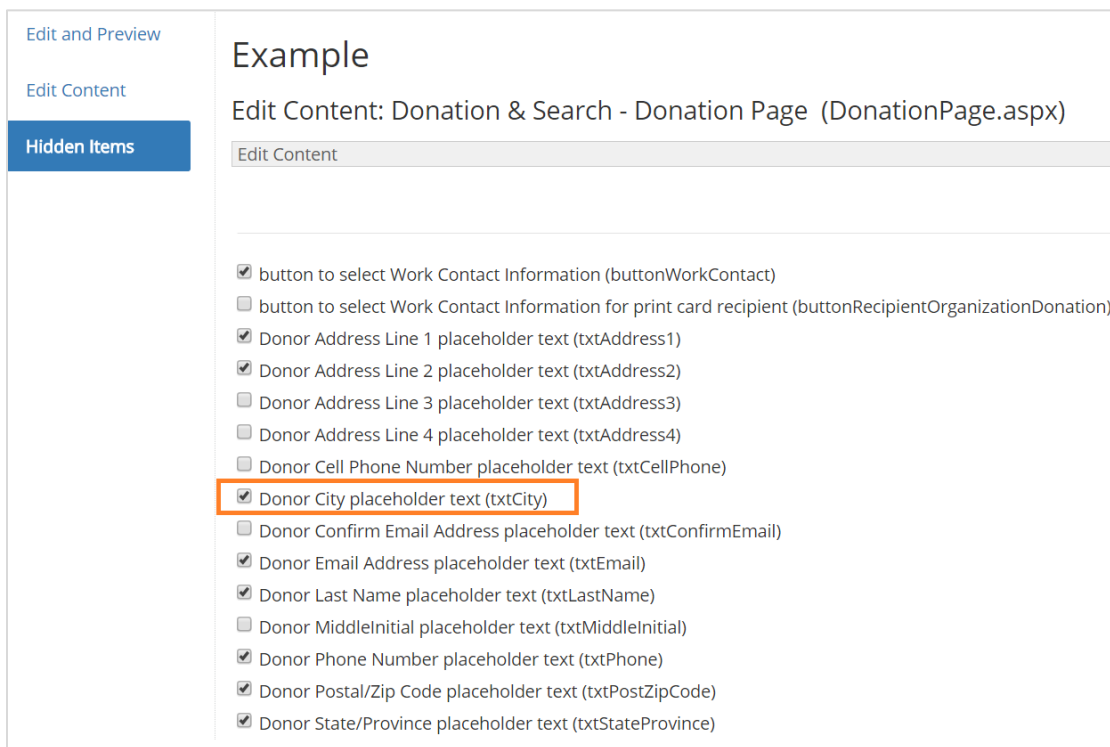
## 5. Edit Content & Hidden Items

The **Edit Content and Hidden Items** sections on the left hand menu bar provide you with a complete list of potential fields that are displayed on the event pages, and a deeper level of configuration access.



In **Edit Content**, you will find additional content fields, as well as fields to enter CSS code for advanced users.

In **Hidden Items**, items with a checkmark are currently-displayed fields, while items with no checkmark are currently hidden fields. For example, to remove the **Donor City placeholder text** (so the donor is not asked for their city), unclick the checkbox. Press **Submit** when you have made the necessary adjustments to your page.



## 6. Advanced Language Options

- i. To add French language to your event, click **French** and **Add Language**.
- ii. All content will need to be customized in English and French.

**Note:** This will not automatically change all of the content to French language. You will need to go through each page in the content sections for French (via the dropdown), and add in the content.

# Style Settings

The Style Settings section allows you to customize the appearance of the website that will be used by registrants and donors for a particular event. Here you can add the visual elements that apply to the page (i.e. Header/Footer, Tabs, Fonts and Headings, and Background, Layout, and Buttons, Custom HTML and CSS).

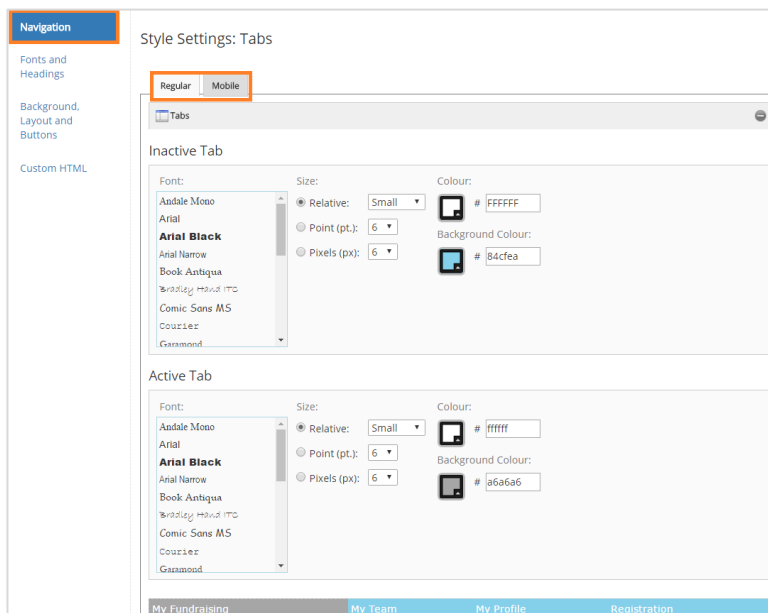
**Header & Footer** - In this section, you can define an image or HTML header and footer for your web (or, if enabled, mobile) pages. Maximum width for header is 1000 pixels. For mobile, the maximum width for header and footer is 400 pixels width.



You can see the difference in alignment when the header is not the correct size (above) and when it is the correct size (below).

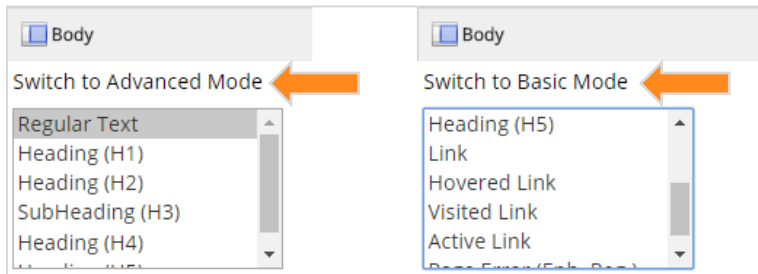


**Navigation** - In this section, you can define the style of the tabs of the fundraising console.

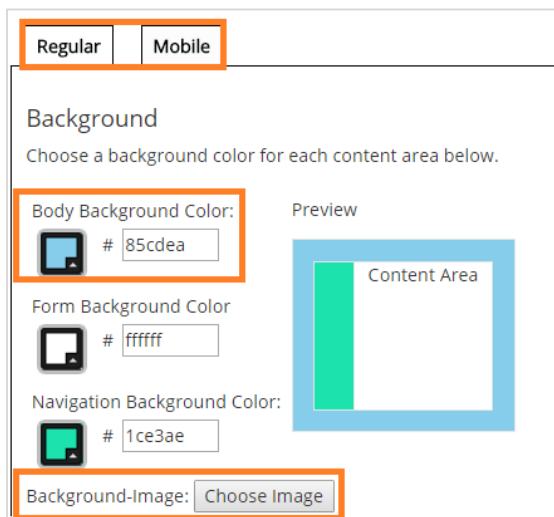




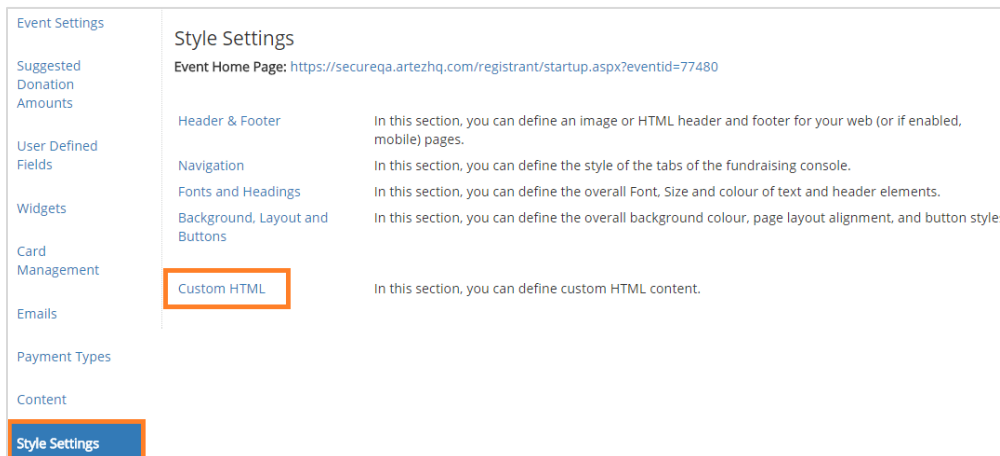
**Fonts and Headings** - In this section, you can define the overall Font, Size, and Color of text and header elements. For fonts, Regular text and Heading (H1 & H2) will cover the main text customizations for this template. You can also click 'Switch to Advanced Mode' which will allow you to customize the link colors and ensure that you have the correct fonts throughout.



**Background, Layout and Buttons** - In this section, you can define the overall background color, page layout alignment, and button styles. Remember that desktop and mobile pages are edited in different tabs.



**Custom HTML** - In this section, you can define custom HTML content.



## Building Out a Microsite

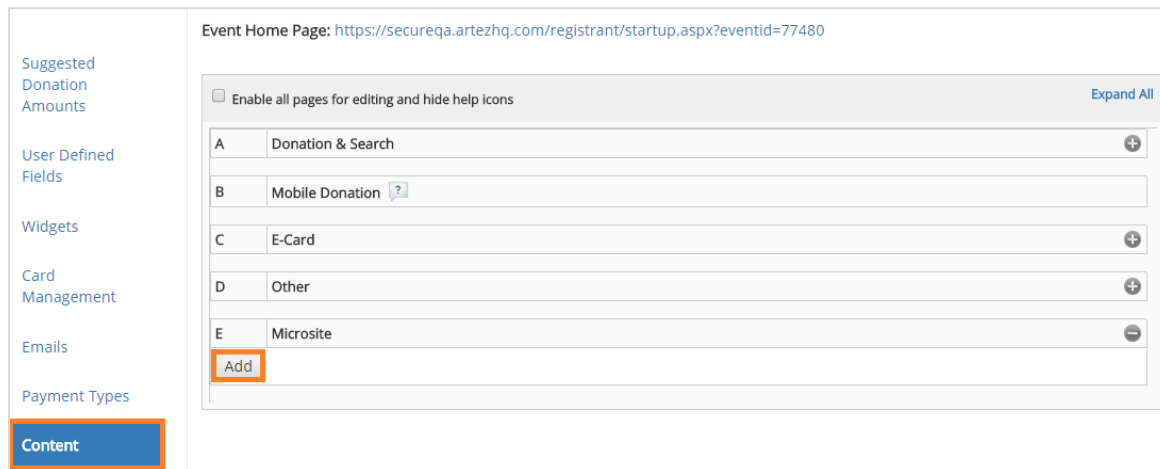
Administrators can create additional pages for their events. These “microsite pages” can be linked from any page, external website or blog. Microsite pages are available for all event templates and can be found in the **Content** section. With Microsite pages, you are able to add in extra content as you please.

To create a microsite page:

1. Open the **Content** section of your event.

From the admin console, choose your event, donation form or purchase template. Then, click **Content** on the left menu.

2. Expand the Microsite section and click **Add**.

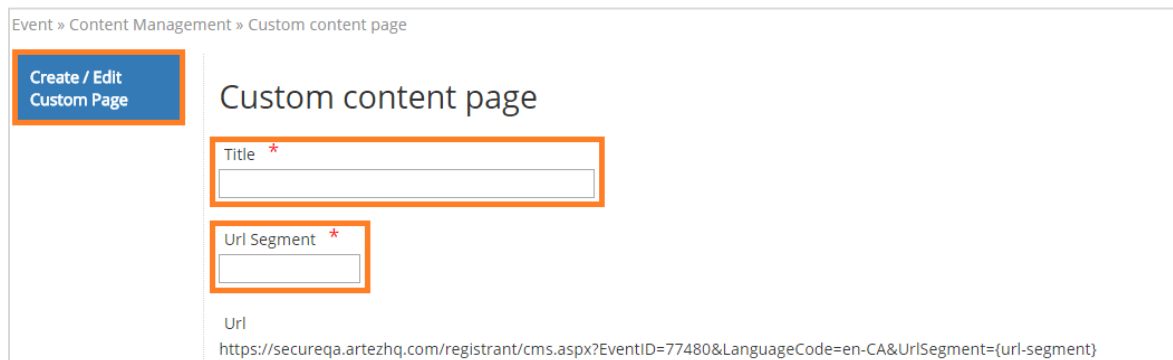


The screenshot shows the 'Content' section of the admin console. On the left, a sidebar lists various management options: Suggested Donation Amounts, User Defined Fields, Widgets, Card Management, Emails, and Payment Types. The 'Content' option is highlighted with an orange box. The main area displays the 'Event Home Page' URL: <https://secureqa.artezhq.com/registrator/startup.aspx?eventid=77480>. Below this, there is a checkbox labeled 'Enable all pages for editing and hide help icons' with an 'Expand All' link. A list of content items is shown, each with a lettered label (A-E) and a title: A Donation & Search, B Mobile Donation, C E-Card, D Other, and E Microsite. An 'Add' button is highlighted with an orange box at the bottom of the list.

3. Set a Title & URL Segment for the page.

In the **Title** field, specify a title. This is the title of the page displayed in the browser when the page is viewed.

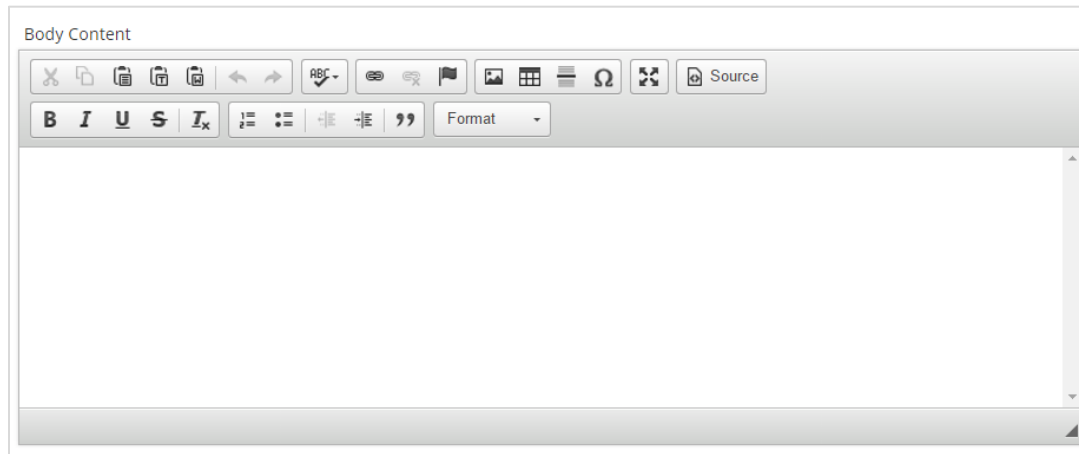
In the **URL Segment**, specify a value. The value inserted here should be meaningful, as it will be appended to the end of the microsite page URL. For instance: “About Us” or “Our\_Corporate\_Sponsors”



The screenshot shows the 'Custom content page' form. At the top, the breadcrumb is 'Event » Content Management » Custom content page'. On the left, a button labeled 'Create / Edit Custom Page' is highlighted with an orange box. The main form has two input fields: 'Title \*' and 'Url Segment \*', both highlighted with orange boxes. Below these fields, the 'Url' field is populated with the URL: <https://secureqa.artezhq.com/registrator/cms.aspx?EventID=77480&LanguageCode=en-CA&UrlSegment={url-segment}>

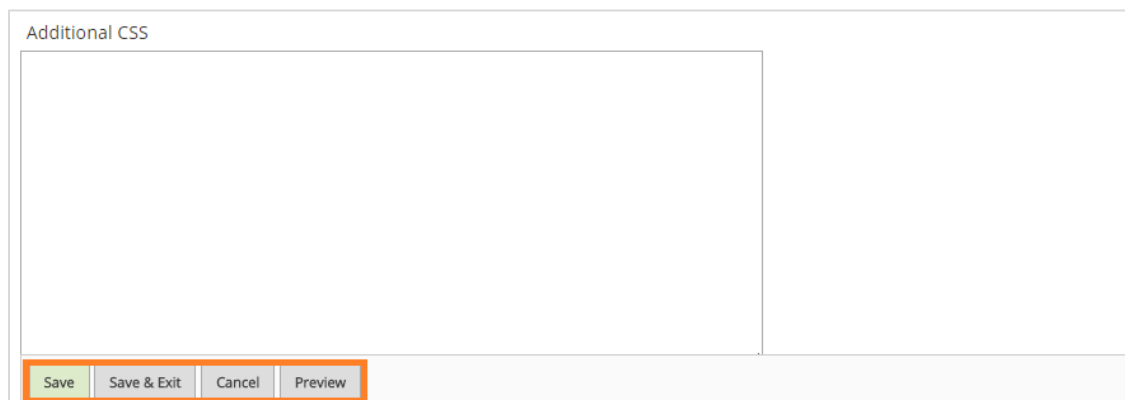
4. Add content to the body of the page.

The editor allows you to create or insert content for your page. You can simply type in content, create tables, and insert images, or you can also click on the source button to insert or modify HTML.



In the Additional CSS section, you can specify unique CSS that will be applied only to your microsite page. (Please note that opening and closing style tags are not required.) This CSS will override the overall event CSS if you have modified your event pages with CSS.

5. Click on the **Save** button on the bottom of the page. Before you exit the screen, you can preview the page by clicking on the **Preview** button or copy the link into a browser window.

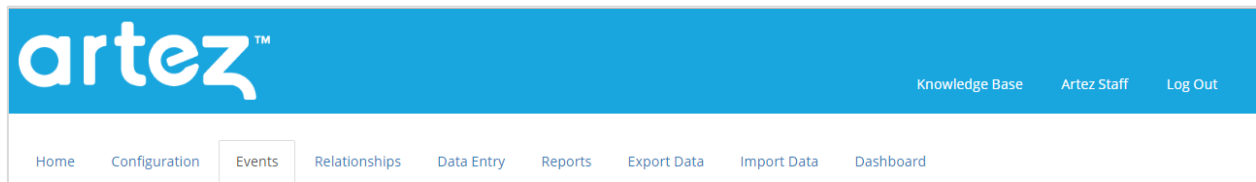


**Note:** Content pages support bilingual events. You may choose to build an English and a French page with content that is unique to each. Alternately, you may make a single page that is applicable to users in both languages.

# Artez Tabs



In the above sections, we touched on some aspects of the **Configuration** tab and the entirety of the **Events** tab. These are the two tabs that will be used the most. The Configuration tab is used when you are changing features on your account, whereas the Events tab deals with features for your individual pages or templates.



In the below section, we will go through the remaining tabs in Artez in more detail.

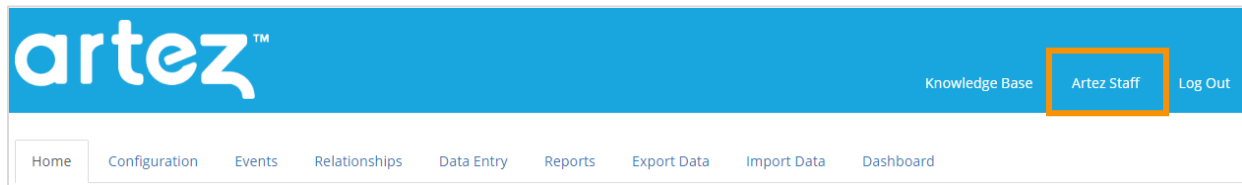
The Need-To-Know topics in this section include:

1. Home tab
2. Relationships tab information
3. Reports tab

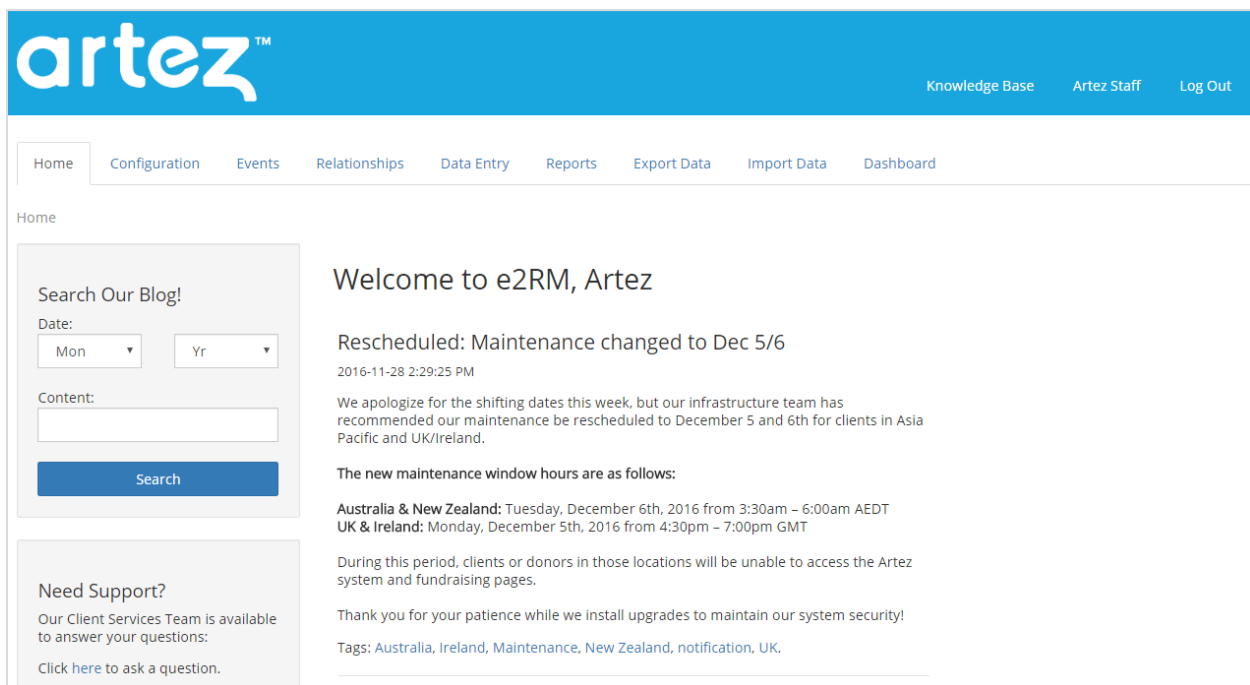
## Home Tab

In the Home tab, you can do the following:

- Change your password
  - To change your password, click on your login name in the top right hand corner of the screen. On the photo below, the login name is **Artez Staff**. Once you have clicked on your login name, enter your current password, and new password. Confirm your new password and click **Submit** when you are finished.



- See new changes and updates in Artez
  - Displayed on the **Home** tab, is information pertaining to recent Artez updates and releases. This section will help to keep you in-the-know when it comes to your platform.
- Edit contact information
  - In the beginning of the eBook, we referenced [important resources](#) to bookmark while building out your template. While you are in Artez and need help, on the left hand menu is a section titled **Need Support?** Follow instructions there to log a support ticket.



## Configuration Tab

In the beginning of this eBook, we detailed the [Administrator Summary](#), [Electronic Payments](#), and [Tax Receipting](#) tabs, but there are many other features in this section that still need to be addressed. The following details the remaining settings and features in the Configuration tab.

### Organization Summary

This is where you can enter your organization contact information. You can also set your Organization Name here so that it will populate the %OrganizationName% keyword on emails and content pages.

### PayPal Fraud Management

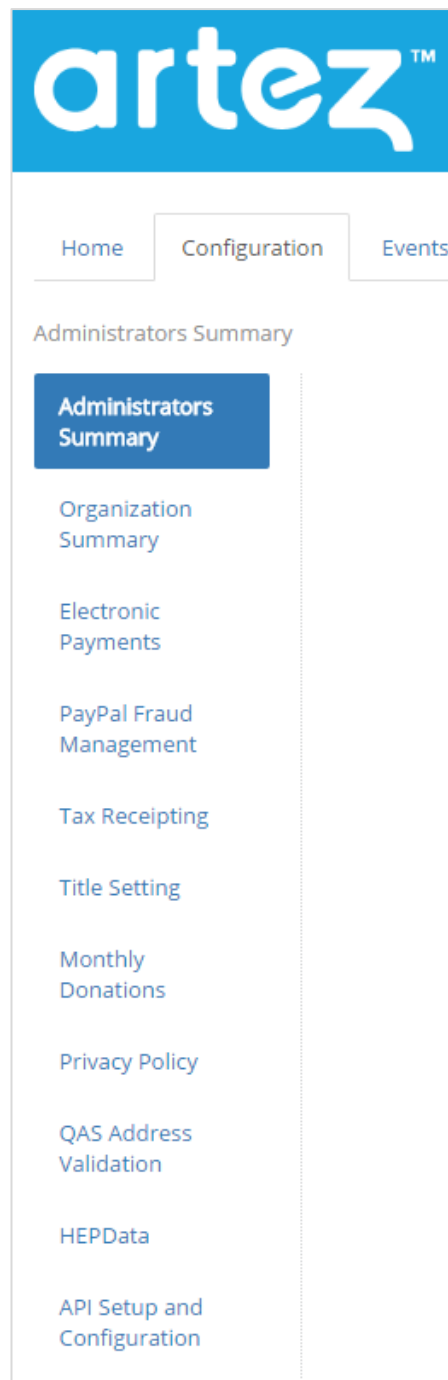
This tab houses a list of transactions that must be reviewed because they violate the Fraud Management Filters (FMF). This tab is only applicable to you if you are using PayPal as a Payment Gateway option.

### Title Setting

This feature allows for you to set up titles, such as Mr., Mrs., Dr., etc. The titles that you set up here are available for participants and donors to choose when entering their name on ALL of your events or templates.

To set up a new title, click on the Title Setting tab, and select the button **Setup New Title**.

1. Beside **Name**, type the title you want to add. (e.g. Mrs.)
2. Beside **Description**, it is optional to type notes regarding the title.
3. Beside **Export ID**, type a unique identifier for this title that will appear in your reporting. (We suggest that you use whatever you typed in the **Name** field unless the system you are exporting to expects a particular identifier.)
4. Beside **Sort Order**, choose the order in which the title should appear in the Title dropdown menu.
5. Beside **Display in dropdown**, choose **Yes** if you want to include the title in your Title dropdown menu.
6. Click **Save**.




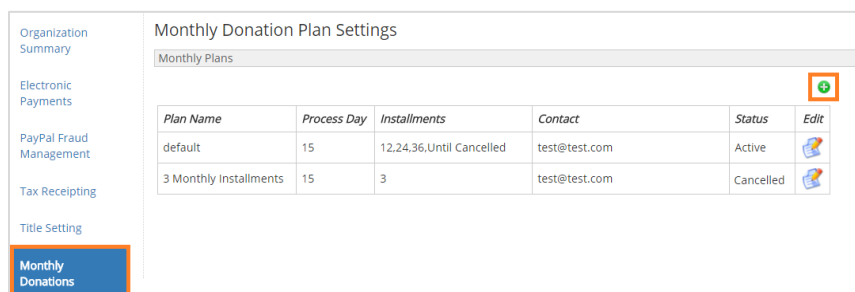
## Monthly Donations



This is where you will set up monthly donations.

**Note:** Once created, you will still need to activate within each template under Payment Types. This is explained [here](#).

To create a New Monthly Plan:

1. Click on the **Monthly Donations** tab from the left hand menu in the configuration section.
2. Click on the  icon:



Plan Name	Process Day	Installments	Contact	Status	Edit
default	15	12,24,36,Until Cancelled	test@test.com	Active	
3 Monthly Installments	15	3	test@test.com	Cancelled	

3. Specify a **Plan Name** for your monthly donation plan.
4. The **Processing Date** is the transaction date that the donation will process on. These may be predefined by your organization or determined by the donor. The numbers shown for options are 1, 15, or 28; these are the dates of the month that the monthly transaction will be processed on. If you choose the processing day as 28, for example, and you have a monthly donation made on January 29, the transaction will not be processed until February 28.
5. You may offer donors up to three administrator-defined **Pre-Defined Installments** options for the number of monthly donation installments to be processed. Payment duration continues to include the **Until Cancelled** option. If you want the donor to select their own number of installments, check the box **Allow donor to specify the # of installments**.
6. The **Status** determines whether this monthly plan is active or cancelled. Click the option that is applicable to this plan.
7. In **Tax Receipting**, admins can decide if they would like monthly donations associated to a specific plan receipted or not at the end of the year. If you would not like to enable tax receipts for monthly donations, check the box next to **Do not receipt**.
8. Monthly Administrator Information:

It's important to include contact information for a monthly administrator. This person will receive notifications:

- Notify administrator when there is one installment left on a monthly donor's plan
- Notify administrator when a monthly donor's credit card has expired
- Notify administrator when a monthly donor's credit card could not be processed

**Note:** If you have the third option selected, you will receive an email for any failed and pending monthly donations. The email will include all necessary information to view the monthly donation in the relationships tab, and it will be up to the administrator to manually set the donation to Failed, Verified, or Voided.

## Privacy Policy

Here is where you can input your organization's Privacy Policy and your organization's logo (optional).

## QAS Address Validation Settings

This is a service where users perform their own address validation before submitting their details to the Artez system. If enabled, this validation will occur on any page where users are prompted to enter an address.

## HEPData

FrontStream's Artez platform is now integrated with HEPData's matching gifts database. Many employers sponsor matching gift programs and will match charitable donations made by their employees.

Available at no additional cost to Canadian and U.S. Artez clients, the HEPData integration allows donors on the Artez platform to easily check if their employer offers matching gifts.

To enable this feature:

1. Click on **HEPData**.
2. Click on Enable and then click **Save**.

HEPData is software partnered with FrontStream to provide this service. If the employer participates in corporate gift matching, it is up to the donor to send their offline donations to the appropriate person. Companies that participate in HEPData will have a procedure listed on how and who to submit your donation receipt to in the company. A photo is shown below of what the HEPData function will look like to donors.

**Note:** HEPData does not work for French donation templates. Bilingual events using HEPData will be shown in English.

### Matching Gift

Your employer may match your gift. Enter your employer name below to see if your company offers m

Yes, google is match eligible. 1 matching gift company(ies) were returned under that name in the Gift

- **Google**

**Company:** Google  
**Subsidiary Of:**  
**Foundation #:** 99990190  
**Last Updated:** 12/14/2016  
**Contact:** c/o Benevity  
**Phone:** 4032377875-1  
**E-mail:** googlegiftmatch@benevity.com  
**Matching Gift Form URL:**  
**Matching Gift Guidelines URL:** <https://www.google.com/intl/en/giving/people.html>  
**Minimum Amount Matched:** 0.0  
**Maximum Amount Matched:** 6000.0  
**Total Per Employee:** 6000.0  
**Gift Ratio:** 1.0:1.0

**Comments:** Nonprofits must register their organization on Benevity's portal, causes.benevity match program. For any questions, please email [charities@benevity.org](mailto:charities@benevity.org). Google will match u general charitable giving.PT employees must work a min. of 20 hrs/week. Faxes not accepte restricted to ongoing secular activities.

**Procedure:**

- Participating donor logs into the matching gift website (check availability of log-in abov

If this is your employer, click on the button below



# Relationships Tab

The Relationships tab allows for admin personnel to see all donors and purchasers.

- To see a specific person that has donated or purchased from your page, click on the Donor/Purchaser Tab.
- Type in the first few letters of the First/Organization Name, Last Name, Constituent ID, or Email Address.
- Press the Search button below.

Events Relationships Data Entry Reports Export Data Import Data Dashboard

### Constituents

New Search  
Search for a constituent. You may search by registrant, donor/purchaser or team.

Registrant Donor/Purchaser Team

First/Organization Name: Sarah  
(starts with)

Last Name:   
(starts with)

Constituent ID:   
(starts with)

Email Address:   
(starts with)

Event: All Events

Tax Receipt:   
(starts with)

Show failed payments?

Search

Search Results

Donor	Event	Email Address	Solicitor	Amount	Date	Const
Doe, Jane	You Can. I Can. Everyone Can	jane.doe@test.com	John Doe	\$300.00 (One-Time On-Line)	Jul 9, 2018	15013

- This will bring up one name or a series of names under **Search Results** that matched what you entered. This will detail their donor name, the event or page that they donated to, their email address, solicitor (who brought them to the page), the amount that they donated/purchased, the date of this transaction, and their Constituent ID. The Constituent ID is a unique number assigned to every transaction that occurs for a donor or purchaser.
- To see a more detailed description, click on the blue hyperlinked name under the **Registrant** tab.

## To Edit a Donor / Purchaser Account Information:

- Click on the link **Edit Account Information**. This will allow you to edit any of the information associated with that person.

Constituents > Account Summary

Account Summary

### Jane Smith

Account Information

Name:	Jane Smith
Email:	test@test.com
Username:	---
Constituent ID:	3172415
Mobile App?	No

Edit Account Information

- To change an account password, enter in a new password and click **Change Password**.

🔒 **Change Password** ⊖

Username:	--
Password:	<input type="password"/> *
Confirm Password:	<input type="password"/> *

Change Password

- Here you can see any monthly donation plans that this account has signed up for.
- You can view all tax receipts issued
- You can view all items purchased by this account
- You can view all emails that have been both sent and received by this associated account

📅 **Monthly Donation Plans** ⊖

This person does not have any monthly donation plans

---

📄 **Tax Receipts** ⊖

No tax receipts have been issued to this person.

---

🛒 **Purchase Orders** ⊖

No items have been purchased by this person.

---

✉️ **Received Emails** ⊖

**Date Filter:** Feb 19, 2017 - Mar 21, 2017 📅

No emails have been received by this person.

### To Refund or Void a Donation:

- Organizations that use the FrontStream Payment Gateway are now able to refund payments directly from the admin console.

Please follow the below steps to issue a refund for a donation:

1. From the FrontStream platform console, go to the **Relationships** tab.
2. Click on the **Donor/Purchaser** tab.
3. Search for the donor and click on the donor that is requesting the refund.
4. Under the Donations Section, click on the 📄 icon next to the donation you would like to refund.
5. From the Donation Summary page, click on **View Payments**.
6. From the Payments page, click on **Details**.
7. In the Payment Summary page, click on the drop down next to Status and select **Voided**.
8. Click on Yes, Change. A warning will then be displayed. Click **OK**.
9. You should now see a message indicating that the payment has been voided in the FrontStream platform and FrontStream Payment Gateway.

**Payment Summary: \$10.00 on Jul 16, 2014**

Please confirm that you wish to change the status of the payment.



The payment has been successfully voided in the Artez system and ArgoFire.

**Payment Information**

Date: **Jul 16, 2014**

Amount: **\$10.00**

Type: **Credit Card**

Status: **Voided**

Notes:

Are you sure you want to change the status of the payment?

- If you log in to the FrontStream Payment Gateway portal, you should expect to see a Credit in the current batch for the payment you just voided.

Credit Transactions for **General Fund Accounts 123**

Items per page: 10  (0 will fill everything on one page) Report Format: XML

Ref #	Customer ID	Inv #	Date	Result	Payment Type	Account Type	Account #	Name	Type	Status	Approval Code	Auth Amt	Capture Amt	User	Register	PO Num #
482167		40815	7/21/2014 12:00:53 PM	APPROVED	VISA	VISA	*****2220	A	Credit	APPROVAL	098588	\$10.00	\$10.00	ssgg4156	Omars Test	

**To Void or Issue Duplicate/ Correction Tax Receipt:**

You can view the donor’s donation, and have the option to either void their tax receipt, or issue a duplicate tax receipt / corrected tax receipt.

By voiding the tax receipt, you are voiding the original tax receipt and once that has been done, you cannot re-issue a tax receipt electronically. A duplicate receipt will issue the original receipt again. A correction receipt will void the original tax receipt and create a new tax receipt that includes any new donor contact information you may have updated.

1. From the FrontStream platform console, go to the **Relationships** tab.
2. Click on the **Donor/Purchaser** tab.
3. Search for the donor and scroll down to click on the donor that is requesting the duplicate or corrected tax receipt.

Home Configuration Events **Relationships** Data Entry Reports Export Data Import Data Dashboard

Search For Constituent

**Search For Constituent**

## Constituents

Search for a constituent. You may search by registrant, donor/purchaser or team.


Registrant Donor/Purchaser Team

First/Organization Name: (starts with)

Last Name: (starts with)

- Click on the  icon under Tax Receipts

**Tax Receipts**

Tax Receipt Number	Date	Amount	Status	
123456789	Feb 7, 2012	\$20.00	New Tax Receipt	


- Select either **Void Tax Receipt** or **Issue Duplicate/Correction**

IF you want to send a duplicate tax receipt to yourself to keep in your own records, add in your email address into the **Recipient Email address (optional)** field on the page before you select **Yes, Issue**.


- Select **Yes, Void** to confirm the void or **Yes, Issue** to confirm the duplicate/correction.

### Editing the Details of a Monthly Donation Plan.

Donors can give monthly donations, the set up process is outlined in the section about [Monthly Donations](#).

- Search the donor in the **Relationships Tab**.
- Click on the blue hyperlinked name of that individual
- Once in their Account Summary, click on the  icon under Monthly Donation Plans
- To edit a monthly donation plan:

**Monthly Donation Plans**

Start Date	Payment Method	Amount	Event	Solicitor	Status	
Apr 8, 2012	Credit Card	\$56.00	Alisa FBC check 2	Tanya Tanya	Active Monthly Plan	

- Click **Edit** to update
- Start Date
- Monthly plan amount
- Status (Active, Cancelled, Paused, All installments have been processed)

**Tip:** If the donor doesn't call back to reinstate the plan within 90 days, the system cancels the monthly donation plan and deletes credit card information.

- e. Number of Installments
- f. Private Donation Permission
- 5. Update the credit card information
  - a. Click **Change Monthly Plan Credit Card**

**Todd Williams**  
**Monthly Donation Plan Settings**

**Monthly Plan Information**

Solicitor :  
 Start Date : 15/11/2013  
 Processing Day: 15  
 Payment Method : **Credit Card**  
 Amount : \$20.00  
 Event : Test solicited  
 Status : Active monthly plan  
 Donation Type : Monthly On-Line  
 Number of Instalments : 999  
 Private Donation Permission:

Save Cancel

**Credit Card Summary**

Card Holder Name : test  
 Card Type : Visa  
 Last Four Digits : 1111  
 Expiry : 10/13

[Change Monthly Plan Credit Card](#)

- b. Change the card holder name, credit card type, credit card number, or expiry date as required.

Only Update Expiry Date and/or Card Holder Name

Card Holder Name : Todd Williams

Credit Card Type : Visa

Credit Card Number :

Expiry Date : 10 13

Save Cancel

- c. Click **Save**.

## Data Entry Tab

### Quick Tips before You Start:

- You can use the Data Entry tab to enter cash/cheque donations you've collected from donors, participants and the event itself.
- You can use the Data Entry tab to also enter offline registrants

**Note:** Data Entry is compatible only with the Event/Campaign template which is offered in Artez Premium.

- If you would like to add offline donations for the other templates (E.g. Direct Donation, Tribute and Purchase Items) you will need to use the [Import Tab](#).

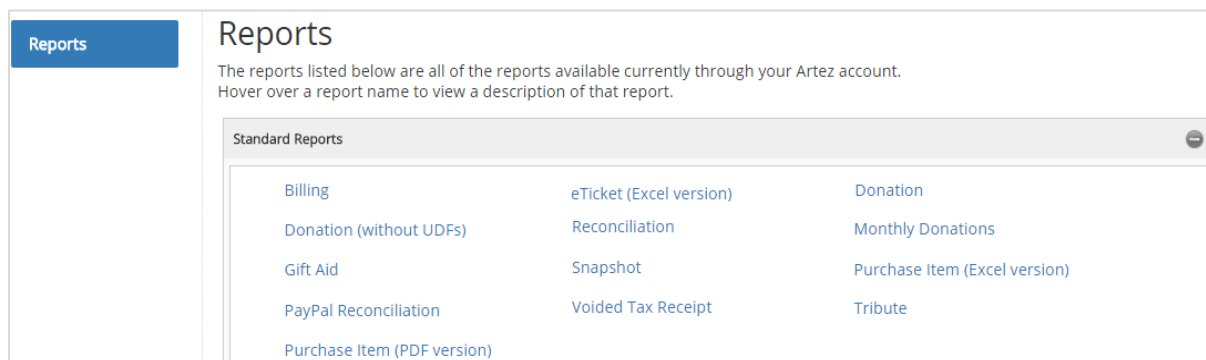
## Reports Tab

The Reports tab is where you can view donor and purchaser information. Any information that was captured by Artez for these individuals can be pulled in specific reports. There are a variety of reports that you can pull, although depending on the information you need, some reports will be more useful than others. If you hover over the title of each report, you can see a description of the report to see if it is what you would like to run.

To run a report, log into the backend of Artez. Click on the **Reports** tab and select the report you wish to run. Next, add the criteria for the reports you want to pull.

Popular reports that will be useful to you are the **Reconciliation, Snapshot, and Donation** reports.

You have the option to create customized reports with the Registration and Donation report. Under **Report Format: Details**, you can create a customized report by dragging and dropping fields into the selected column.



## Export Data

The Export Data tab allows you to export data from each event. Each time a new record is created, or an existing record is updated, a new transaction row will appear in the Export file. The Export Tab would be used over Reports if you want to get a raw data capture or transfer this data into a donor database or CRM.

If data has been added to any of your events or records have changed, your file will automatically be available for download and listed as **New** as shown in the image below.

### Tip:

- New records will include: new registrations and donations.
- Updated records include updates in the Relationships Tab including Goals, Payment Status, Tax Receipts, etc.

ExportID	Request Date	Request Status	Export File	File Format	File Status	Record Count
436966	Dec 1, 2016 03:45 PM	Processed	export-20161201T034531	Please select one ▼	New	602

Files are available in CSV and XML format. Various file versions are available for historical releases. Please choose the highest version for the file containing all system data. When you select the File Format, the Export becomes available for download. Click on the file URL to open.

ExportID	Request Date	Request Status	Export File	File Format	File Status	Record Count
436966	Dec 1, 2016 03:45 PM	Processed	<a href="#">export-20161201T034531</a>	CSV 1.8 ▼	New	602

Once you download the Export, it will appear as “Downloaded”, and will remain available for download.

435237	Nov 23, 2016 10:15 AM	Processed	export-20161123T101501	Please select one ▼	Downloaded	316
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## Import Data Tab

The import tool allows you to import batches of donor and/or registrant records into an existing event within Artez. Here you will also be able to view the history of previous imported data. Follow the instructions on the screen under the **Import Data** tab to import previous data into your current Artez account.

## Dashboard

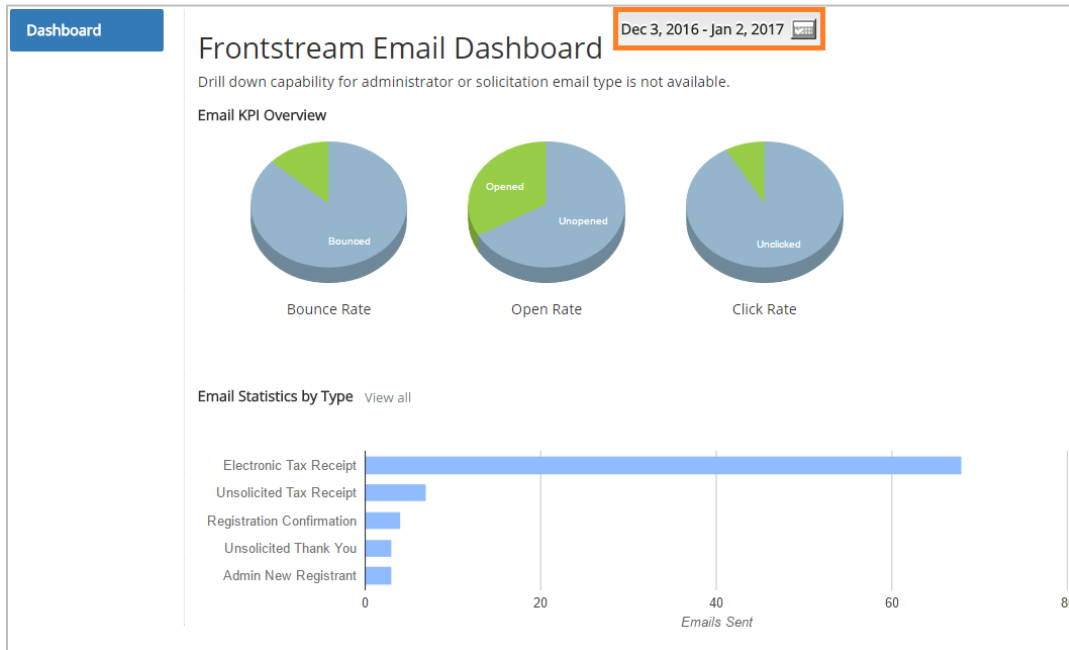
The Dashboard tab in the administration console allows your organization to gain powerful insight into your email performance. Through the Dashboard you can track important KPIs such as delivery/bounce rate, opens and click rate. This guide provides an overview of this new feature.

### How it works

When you click on the Dashboard tab, the first page you will see is an organizational summary of your email performance.

**Note:** Email data is not in real time. It may take several hours for the data to refresh.

## Organization View

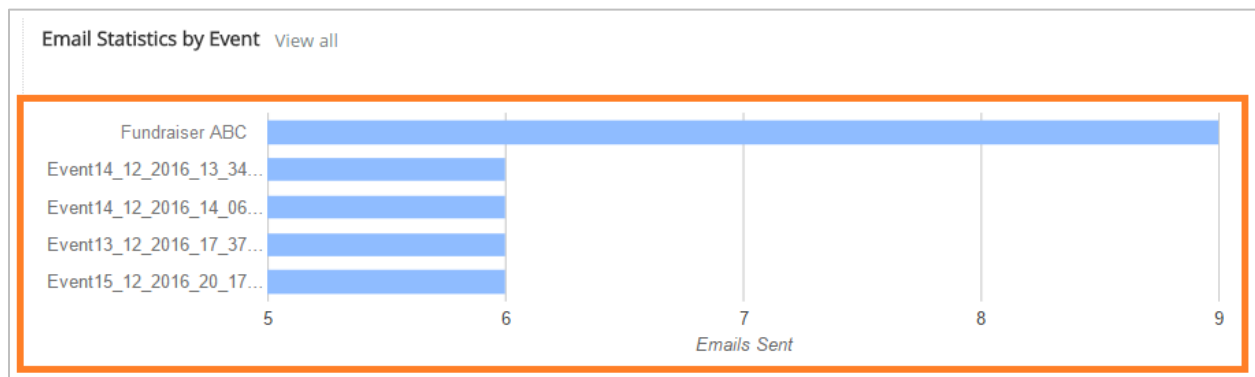


There are three pie graphs on the main dashboard screen that explain the following categories:

- The **Bounce Rate** explains your successful and unsuccessful email delivery
- The **Open Rate** tracks whether the email was opened or not.
- The **Click Rate** tracks clicks for emails that contain links.

## Email Level View

When you click on the specific email type under **Email Statistics by Event**, you can see more detailed email statistics for each specific event.



To access this, click on each specific type of email, for example clicking on the blue bar next to **Fundraiser ABC** would provide you information on:

- **Email KPI Overview** (Bounce Rate, Open Rate, and Click Rate)
- **Email Statistics by Type** (Unsolicited Thank You, New Sponsor, etc.)



Please note, tracking if an email has been opened or not is very difficult and requires the following criteria:

- The email must be in HTML format. Plain text email will be counted as not opened.
- The user's email program must have **display images** enabled. Most desktop email programs default to not displaying images in email – the user has to allow this, however, mobile devices display images by default.

## Knowledge Base References



If you are lost, or need some clarification, this chapter will break down sections in the eBook for you to easily reference. The Artez Tabs Summary Page gives a summary of each tab section in the backend of Artez. As mentioned earlier, the Knowledge Base is a useful tool as it provides step-by-step instructions and video tutorials to guide you. Below is a list of the tab sections in Artez with their corresponding links to the Knowledge Base. Some of these include course videos for you to watch.

The following chart provides a link to the Knowledge Base section of each topic.

Tabs	Knowledge Base Links
Direct Donate Template Course: Purchase Template Course:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203551179-Course-Build-Your-Direct-Donation-Form-25-min-">https://FrontStream.zendesk.com/hc/en-us/articles/203551179-Course-Build-Your-Direct-Donation-Form-25-min-</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/203550929-Course-Build-Your-Online-Purchase-Page-30-min-">https://FrontStream.zendesk.com/hc/en-us/articles/203550929-Course-Build-Your-Online-Purchase-Page-30-min-</a>
<b>Configuration Tab</b>	
Account Setup:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204252135-Course-Account-Setup-15-min-">https://FrontStream.zendesk.com/hc/en-us/articles/204252135-Course-Account-Setup-15-min-</a>
<b>Administrators:</b> Administrator Access:  Existing Administrators:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203506559-Adding-administrators">https://FrontStream.zendesk.com/hc/en-us/articles/203506559-Adding-administrators</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/204211345-Administrator-access-rights">https://FrontStream.zendesk.com/hc/en-us/articles/204211345-Administrator-access-rights</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/203506519-Working-with-existing-administrators">https://FrontStream.zendesk.com/hc/en-us/articles/203506519-Working-with-existing-administrators</a>
<b>Organization Summary</b>	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204211085-Organizational-details">https://FrontStream.zendesk.com/hc/en-us/articles/204211085-Organizational-details</a>
<b>Electronic Payments</b> Setting up Gateway:  PayPal Explained:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203506459-Electronic-payment-gateway">https://FrontStream.zendesk.com/hc/en-us/articles/203506459-Electronic-payment-gateway</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/204211075-PayPal-Donations-Explained">https://FrontStream.zendesk.com/hc/en-us/articles/204211075-PayPal-Donations-Explained</a>
<b>Tax Receipting</b> Tax Receipt Setup	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204211235-Setting-up-tax-receipts">https://FrontStream.zendesk.com/hc/en-us/articles/204211235-Setting-up-tax-receipts</a>
<b>Title Settings</b> Setting up Titles	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204211135-Titles-for-your-constituents">https://FrontStream.zendesk.com/hc/en-us/articles/204211135-Titles-for-your-constituents</a>
<b>Monthly Donations</b> Creating monthly plan: Enabling Monthly Donations:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204211165-Configuring-your-master-monthly-donation-plan">https://FrontStream.zendesk.com/hc/en-us/articles/204211165-Configuring-your-master-monthly-donation-plan</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/203569369-Enabling-monthly-donations">https://FrontStream.zendesk.com/hc/en-us/articles/203569369-Enabling-monthly-donations</a>
<b>Privacy Policy</b>	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203506319-Privacy-policy">https://FrontStream.zendesk.com/hc/en-us/articles/203506319-Privacy-policy</a>
<b>HEP Data Overview:</b> Matching Gifts:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/206333126-HEPData-Integration">https://FrontStream.zendesk.com/hc/en-us/articles/206333126-HEPData-Integration</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/204888405-Matching-Gifts-Explained">https://FrontStream.zendesk.com/hc/en-us/articles/204888405-Matching-Gifts-Explained</a>
<b>API Setup and Configuration</b> How to Integrate:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203597489-Fundraising-Pro-integrated-with-the-FrontStream-CRM">https://FrontStream.zendesk.com/hc/en-us/articles/203597489-Fundraising-Pro-integrated-with-the-FrontStream-CRM</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/206498103-How-to-integrate-Fundraising-Pro-with-FrontStream-CRM-">https://FrontStream.zendesk.com/hc/en-us/articles/206498103-How-to-integrate-Fundraising-Pro-with-FrontStream-CRM-</a>
<b>Events Tab</b>	
Closing an Event: Closing Public Access:  Archiving an Event:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203562109-Closing-event-registration">https://FrontStream.zendesk.com/hc/en-us/articles/203562109-Closing-event-registration</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/203537969-Closing-public-access-to-your-page">https://FrontStream.zendesk.com/hc/en-us/articles/203537969-Closing-public-access-to-your-page</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/204242325-Archiving-an-event">https://FrontStream.zendesk.com/hc/en-us/articles/204242325-Archiving-an-event</a>
<b>Event Summary</b> Overview:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204242385-Event-Summary">https://FrontStream.zendesk.com/hc/en-us/articles/204242385-Event-Summary</a>
<b>Event Settings</b> Donation Page: Purchase Page:  Tribute Page:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204252515-Donation-page-event-settings">https://FrontStream.zendesk.com/hc/en-us/articles/204252515-Donation-page-event-settings</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/204252445-Purchase-page-event-settings">https://FrontStream.zendesk.com/hc/en-us/articles/204252445-Purchase-page-event-settings</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/204252355-Tribute-page-event-settings">https://FrontStream.zendesk.com/hc/en-us/articles/204252355-Tribute-page-event-settings</a>
<b>Suggested Donation Amounts:</b>  Dynamic Donations:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204268745-Creating-suggested-donation-amounts">https://FrontStream.zendesk.com/hc/en-us/articles/204268745-Creating-suggested-donation-amounts</a> <a href="https://FrontStream.zendesk.com/hc/en-us/articles/204354065-Enabling-dynamic-donation-amounts">https://FrontStream.zendesk.com/hc/en-us/articles/204354065-Enabling-dynamic-donation-amounts</a>

<b>Downloadable Forms</b>	
Pledge Form:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204266615-Downloadable-pledge-form">https://FrontStream.zendesk.com/hc/en-us/articles/204266615-Downloadable-pledge-form</a>
Results Form:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204266585-Downloadable-results-form">https://FrontStream.zendesk.com/hc/en-us/articles/204266585-Downloadable-results-form</a>
<b>User Defined Fields</b>	
Creating Survey:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204175955-Creating-a-user-defined-field-survey-question-">https://FrontStream.zendesk.com/hc/en-us/articles/204175955-Creating-a-user-defined-field-survey-question-</a>
Questions:	
<b>Widgets</b>	
Setting up Widgets:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203555249-Event-Setup-Course-Part-3-of-5-Widgets-15-min-">https://FrontStream.zendesk.com/hc/en-us/articles/203555249-Event-Setup-Course-Part-3-of-5-Widgets-15-min-</a>
<b>Card Management</b>	
Creating E-Cards:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203539279-E-card-setup">https://FrontStream.zendesk.com/hc/en-us/articles/203539279-E-card-setup</a>
<b>Emails</b>	
All About Emails:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/206370853-Featured-Course-All-About-Emails">https://FrontStream.zendesk.com/hc/en-us/articles/206370853-Featured-Course-All-About-Emails</a>
<b>Payment Types</b>	
Payments Types:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203537989-Payment-types-explained">https://FrontStream.zendesk.com/hc/en-us/articles/203537989-Payment-types-explained</a>
<b>Content</b>	
Content Management:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203538819-Content-management">https://FrontStream.zendesk.com/hc/en-us/articles/203538819-Content-management</a>
<b>Style Settings</b>	
Style Settings:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204243275-Style-Settings-Overview">https://FrontStream.zendesk.com/hc/en-us/articles/204243275-Style-Settings-Overview</a>
Overview:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204243285-Where-can-I-enter-CSS-JavaScript-and-HTML-head-content-">https://FrontStream.zendesk.com/hc/en-us/articles/204243285-Where-can-I-enter-CSS-JavaScript-and-HTML-head-content-</a>
Custom Coding:	
<b>Relationships</b>	
Donor Registrant Management:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204014349-Course-Donor-Registrant-Management-15-min-">https://FrontStream.zendesk.com/hc/en-us/articles/204014349-Course-Donor-Registrant-Management-15-min-</a>
Viewing Registration Payments:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203569979-Viewing-registration-payments-for-an-event">https://FrontStream.zendesk.com/hc/en-us/articles/203569979-Viewing-registration-payments-for-an-event</a>
<b>Data Entry Tab</b>	
Offline Donation Management:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204292679-Course-Offline-Donation-Management-Data-Entry-Tab-10-min-">https://FrontStream.zendesk.com/hc/en-us/articles/204292679-Course-Offline-Donation-Management-Data-Entry-Tab-10-min-</a>
Direct Donation to Event:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204271795-Enter-a-direct-donation-to-an-event-via-data-entry">https://FrontStream.zendesk.com/hc/en-us/articles/204271795-Enter-a-direct-donation-to-an-event-via-data-entry</a>
<b>Reports</b>	
Reports Course:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204702625-Course-Reports-10-min-">https://FrontStream.zendesk.com/hc/en-us/articles/204702625-Course-Reports-10-min-</a>
Reports Tab Explained:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204271565-Reports-tab-explained">https://FrontStream.zendesk.com/hc/en-us/articles/204271565-Reports-tab-explained</a>
<b>Export Data</b>	
Export File Explained:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204271185-Export-file-explained">https://FrontStream.zendesk.com/hc/en-us/articles/204271185-Export-file-explained</a>
Offline Donations:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/204292709-Course-Offline-Donation-Management-Import-10-min-">https://FrontStream.zendesk.com/hc/en-us/articles/204292709-Course-Offline-Donation-Management-Import-10-min-</a>
<b>Import Data</b>	
Importing Donors or Registrants:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203571219-How-to-import-offline-donors-or-registrants">https://FrontStream.zendesk.com/hc/en-us/articles/203571219-How-to-import-offline-donors-or-registrants</a>
<b>Dashboard</b>	
Email KPIs:	<a href="https://FrontStream.zendesk.com/hc/en-us/articles/203539159-Dashboard-tab-email-KPI-s">https://FrontStream.zendesk.com/hc/en-us/articles/203539159-Dashboard-tab-email-KPI-s</a>