SIRM Foundation

GIVESMART PLATFORM USERGUIDE

GETTING STARTED?

Step 1: First, things, first. Your organization needs access to the system. Send an email to: <u>givesmart@shrm.org</u> with a subject header: I want to get started! Include your first name, last name, email and cell phone number.

Step 2: We will take care of setting you up in system with the information you provided. Within 24 hours, you will get an email from SHRM <u>givesmart@shrm.org</u> telling you it is done and an email from GiveSmart giving you your log in information to start your campaign.

What their email looks like:

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Dear Elizabeth,
Great News! You have been granted permission to access the SHRM Foundation - Campaigns admin site. You can now view all your campaigns and total funds raised from one location!
Our welcome guide, the first of our enablement series, walks you through the next steps including account setup, getting started with a campaign, and an overview of our people and services. You can count on us every step of the way!
Welcome Guide - video
Welcome Guide - pdf
Next Steps
Complete Account Setup Visit your admin site to create a username and password.
Visit Admin Site
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Note: You can watch the Welcome Guide video and review the PDF but we have also prepared SHRM specific information for you in this user guide

Step 3: Click on Visit Admin Site





Step 5: Write down your username and password

<u>Troubleshooting Tip</u> If you do not receive the email, it could have been labeled spam by your IT security. Check in your spam folder for an email labeled: no-reply@givesmart.com

<u> Peer -to-Peer Ideas</u>

Have an intern who is particularly good at IT?

Arizona SHRM State Council did and gave them this opportunity to learn and take project ownership. Give them access or someone else you designate by going to Admin section and adding them.

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Congratulations, you are now ready to begin using GiveSmart...