

Admin Guide

1. How to manage events
 - How to create an event
 - How to edit an event
 - How to archive (delete) an event
2. How to manage teams
 - How to create a team
 - How to edit a team
 - How to remove a team
 - How to remove a person from a team
3. Where to find stripe reports
 - How to find successful transactions
 - How to find failed transactions
4. Where to edit the stripe features
 - How to edit the auto email receipt
 - How to edit the stripe checkout page
 - How to ensure the auto email receipt is enabled

Manage Events

An event is a current activity/fundraising campaign/etc. that you as the admin want to displayed on the website. This event will be available for anyone to donate to and to have teams created to help engage and pursue the event donation goal. The system can support many events but only one will be active on the website and displayed. If multiple events haven't ended yet, only the next to expire event will be shown on the website.

How To Create An Event

1. Login as Admin



2. Click on Add Event button on the navigation bar



3. Fill out info

Create New Event

The form consists of several input fields:

- Event Title:** A text input field with a placeholder "Event Title". A red arrow points to the right side of this field.
- Event Location:** A text input field with a placeholder "Event Location". A red arrow points to the right side of this field.
- Event Description:** A text area input field. A red arrow points to the right side of this field.
- Donation Target:** A text input field with a placeholder "\$". A red arrow points to the right side of this field.
- Event End Date:** A date input field with a placeholder "mm/dd/yyyy". A red arrow points to the right side of this field.
- Image/Media:** A file input field with a placeholder "Choose File" and "No file chosen". A red arrow points to the right side of this field.

Below the input fields is a note: "Select an image that will be displayed on the event page."

At the bottom right is a yellow "SUBMIT" button.

- Notes:

- The Event Title will be seen on the home page.
- The Event Location (if there is no physical location just put the location as online) will be seen in the event details window (when a user asks to see event details), same goes for the event description.
- The Donation target is the amount of fund you want to raise in this campaign/event. It will be seen on the homepage as the end goal for that charity event.
- The Event End Date will control website visibility. When the event passes the end date it will disappear from the website and the next upcoming charity event (based on the next end date) will be shown in its place
- The Image/Media should represent the charity and ideally something specific about this event/campagin.

4. Hit submit

5. You have a new Event

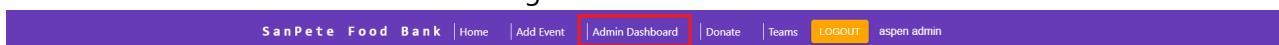
- Note: Reminder, only one event can be shown on the application at a time. Only the event with the nearest "end date" will be shown.

How To Edit An Event

1. Login as Admin



2. Click on the admin Dashboard on the navigation bar



3. Click the edit button on the current event



4. Change the information you need to
5. Click save
6. The event has been edited

How To Delete An Event

1. Login as Admin



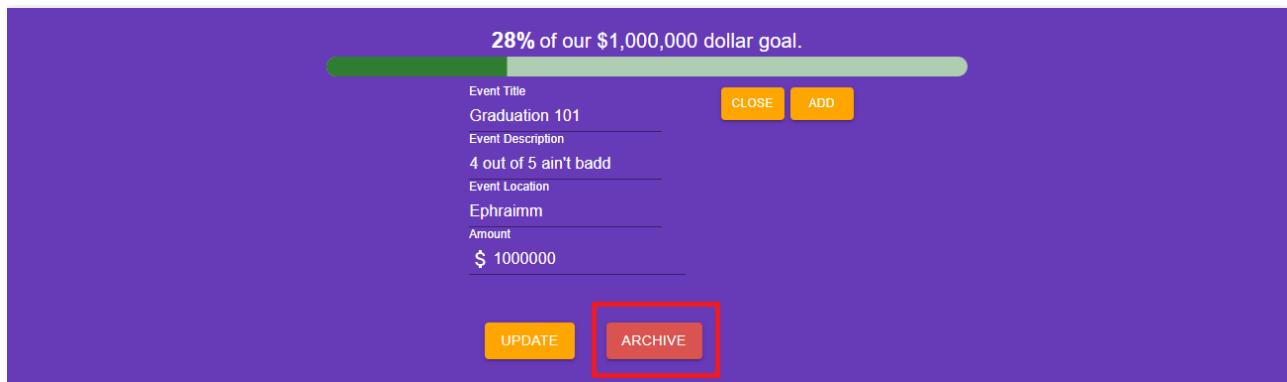
2. Click on the admin Dashboard on the navigation bar



3. Click on the edit button on the current event

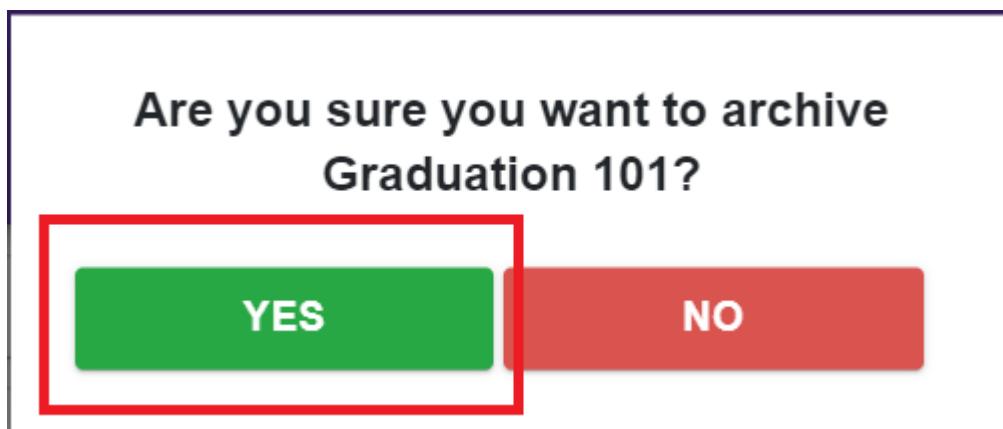


4. Click the archive button



- Note: Archiving an event makes it so it is no longer be visible on the website. It can still be found in the database.

5. Click Yes on the archive



6. The event has been archived and the next upcoming event will be shown

Manage Teams

This application supports the idea of team centered fundraising campaigns/events. Hopefully having a smaller team with a team owner will lead to a greater team member participation in the campagin/event.

Normally, a team is created by any user (that comes onto the site and registers through keycloak) who wants to sponsor a team. A user can only be on one team. A user can switch what team they are on as long as they are not the current owner of any team in the current event.

As an administrator you can review the teams users have made. You can delete a team, you can edit a team, you can remove misbehaving memebers from a team.

FYI: How Users Create Teams

1. Login



2. Click Create a Team button

A screenshot of a charity event page titled "Graduation 101". At the top, there is a video player showing a woman in a blue patterned shirt interacting with another person. Below the video, it says "Watch on YouTube". A progress bar indicates "28% of our \$1,000,000 dollar goal." Below the progress bar are three buttons: "SHARE NOW", "EVENT DETAILS", and "DONATE". Underneath the video player, there is a section titled "Charity Teams" with the subtext "Joining a charity team is a fulfilling way to make a positive impact while connecting with like-minded individuals who share your passion for giving back." Below this, there is a "BENEFITS OF CHARITY TEAMS" section with two buttons: "ACTIVE TEAMS" and "CREATE A TEAM". The "CREATE A TEAM" button is highlighted with a red box.

3. Fill out the information and click submit

The screenshot shows a web form for creating a team. It includes fields for logo upload, team name, welcome message, description, and donation goal, each with a red arrow pointing to it from the left.

Choose File No file chosen
 Select an image that will be displayed as your team's logo. This will be used as the main image on the team page.

Team Name
 Ex: Power Rangers V World Hunger
 This will be used as the title of your team page, the active teams page, and used in the description when someone joins your team.

Team Welcome Message (Type in a message here that you want people who join your team to see.)
 Ex: Thank you for joining Power Rangers. I, the red ranger, will lead us to victory against hunger and with your help we will supply \$500 to end this war.
 This will be used when a member joins your team

Team Description
 Ex: Join as your favorite power ranger color and together we will end world hunger.
 This will be used on your team page

Donation Goal (US Dollars)
 0
 This will be used on your team page

SUBMIT

- Notes:

- The image chosen will be used as the visual image of your team on your team page.
- The Team Name will be used as the visual factor for all to find the team on the active team's page. As well as of course the title text on the given team page
- The Team Welcome Message will be used as a welcoming message when someone joins your team, thanking them for their support, etc.
- The Team Description will be used to help describe and tell those who read it why they should join your team and help you reach the goal that you have set. It will be seen on the team page
- The donation goal will be used on the team page as the end goal of the progress bar.

4. Click Submit

5. You have created a team.

- Notes:

- If you are a current owner of a team (you have already created one) then you can not create another team.
- If you are an owner of a team you can not switch teams
- You can delete your team that you own if there are no other members on the team (Admin can delete a team even if there are members on the team)

Admin Action: How To Edit A Team

1. There are two ways to edit a team.

2. Method #1

1. Login as Admin



2. Go to Admin Dashboard



3. Click on the team accordion

28% of our \$1,000,000 dollar goal.

Current Event: Graduation 101

Teams

Stripe Error Logs | 10 Failures / 48 Successes

4. Click the update button

4310% of our \$232

asdf

UPDATE **DELETE**

5. Enter the information you want to be changed

- Note: An image must be supplied to have the save button become clickable

6. Click save

7. The team details have been edited

3. Method #2

1. Login as Admin

SanPete Food Bank

| Home | Donate | Teams | **LOGIN**

2. Go to active teams

Graduation 101

SanPete Pantry

Watch later Share

Watch on YouTube

28% of our \$1,000,000 dollar goal.

SHARE NOW EVENT DETAILS DONATE

Charity Teams

Joining a charity team is a fulfilling way to make a positive impact while connecting with like-minded individuals who share your passion for giving back.

BENEFITS OF CHARITY TEAMS

ACTIVE TEAMS **CREATE A TEAM**

3. Go to the team you want to edit

Existing 2 Teams

ASDF

SALLY TEAM

4. Click the edit team details button

←

asdf

SHARE NOW

JOIN OUR TEAM **EDIT TEAM DETAILS** DELETE TEAM

About us:
sdf

5. Enter the information you want to be changed
 - Note: An image must be supplied to have the save button become clickable
6. Click save
7. The team details have been edited

Admin Action: How To Delete A Team

1. Login as Admin

San Pete Food Bank

| Home | Donate | Teams | **LOGIN**

- There are 2 ways you can delete a team as an admin
2. Method #1
 1. Go to active teams

Graduation 101

Sanpete Pantry

Watch later Share

Watch on YouTube

28% of our \$1,000,000 dollar goal.

SHARE NOW EVENT DETAILS DONATE

Charity Teams

Joining a charity team is a fulfilling way to make a positive impact while connecting with like-minded individuals who share your passion for giving back.

BENEFITS OF CHARITY TEAMS

ACTIVE TEAMS CREATE A TEAM

2. Go to the team you want to delete

Existing 2 Teams

ASDF

SALLY TEAM

3. Click the Delete Team button

[←](#)

asdf

[SHARE NOW](#)

[JOIN OUR TEAM](#) [EDIT TEAM DETAILS](#) [DELETE TEAM](#)

About us:
sdf

4. Click Yes



5. The team has been deleted and you will have been redirected to the home page

3. Method #2

1. Go to the admin dashboard

SanPete Food Bank | Home | Add Event | [Admin Dashboard](#) | Donate | Teams | LOGOUT aspen admin

2. Click on the team accordion

28% of our \$1,000,000 dollar goal.

Current Event: Graduation 101 [EDIT](#) [ADD](#)

▼ Teams

▼ Stripe Error Logs | 10 Failures / 48 Successes

3. Click the delete button on the team you want to delete

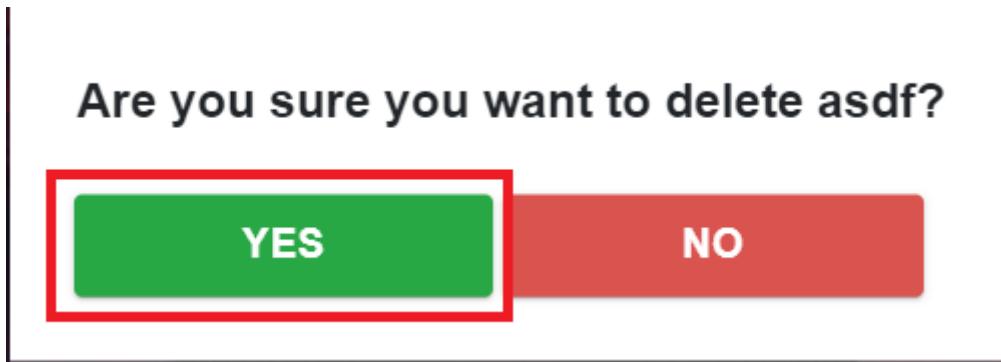
28% of our \$1,000,000 dollar goal.

Current Event: Graduation 101 [EDIT](#) [ADD](#)

▲ Teams

▼ 4310% of our \$232 **asdf** [UPDATE](#) [DELETE](#)

4. Click Yes



5. The team has been deleted

- Note: Deleting a team does not remove all users from the system. It will remove their association to the team removed. The users who were part of the team will still be able to join other teams if they want to. The removed team can still be found in the database

Admin Action: How To Remove a Person From a Team

1. Login as Admin



2. Go to the active teams

The screenshot shows a charity team page for 'Graduation 101'. At the top, there is a video player showing a woman in a pantry. Below the video, a progress bar indicates '28% of our \$1,000,000 dollar goal.' There are three buttons at the bottom of the video player: 'SHARE NOW', 'EVENT DETAILS', and 'DONATE'. Below the video player, the section title 'Charity Teams' is visible, along with a sub-section titled 'BENEFITS OF CHARITY TEAMS'. At the bottom of this section, there are two buttons: 'ACTIVE TEAMS' (highlighted with a red box) and 'CREATE A TEAM'.

3. Click on the team where the person is located

Existing 2 Teams

ASDF

SALLY TEAM

4. Find the person you want to delete in the team member list

Members:

- X
- X Esplintk3
- X Esplintk4
- X Esplintk5

5. Click on the X button next to their name

Members:

- X
- X Esplintk3
- X Esplintk4
- X Esplintk5

6. Click Yes

**Are you sure you want to remove
memeber Trent3 Esplin3 from your
team?**

YES

NO

7. The person has been removed from the team

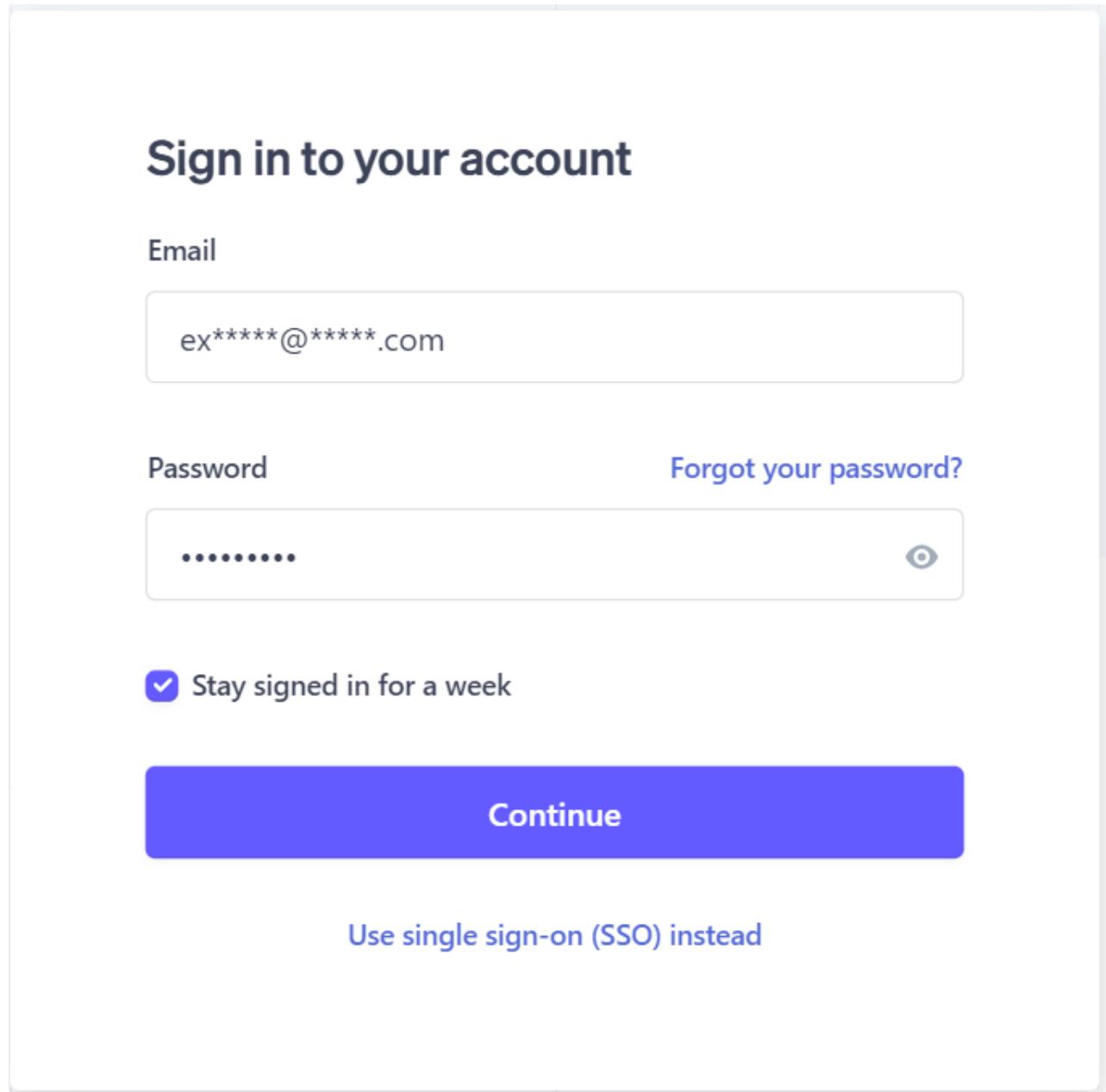
- Notes:
 - If the only person on the team is the team owner you will not be able to remove them from the team. Instead, you will have to delete the team
 - Removing a person from the team does not remove them from the charity event/system they simply have their association with the team removed. They can still join a team if they want to

Stripe Reports

Stripe reports are a great way to see a history of all transactions made for an event. You can also check Stripe to see all failing transactions if there are any, and the reason why they are failing. This of course can also be found on the admin dashboard where it presents all failed transactions for the current event.

How To Find Successful Transactions

1. Login into the organization stripe account



2. Click on the payments button on the navigation bar

Aspen

Home Payments Balances Customers Products Billing Reports Connect More

Create Help Developers Test mode

3. Click on the All Payments button

Aspen

Home Payments Balances Customers Products Billing Reports Connect More

TEST DATA

Payments

All payments Disputes All transactions

All Succeeded Refunded Uncaptured Failed

Date Amount Status Payment method

Export + Create payment

4. Click on the succeeded tab

Aspen

Home Payments Balances Customers Products Billing Reports Connect More

TEST DATA

Payments

All payments Disputes All transactions

All **Succeeded** Refunded Uncaptured Failed

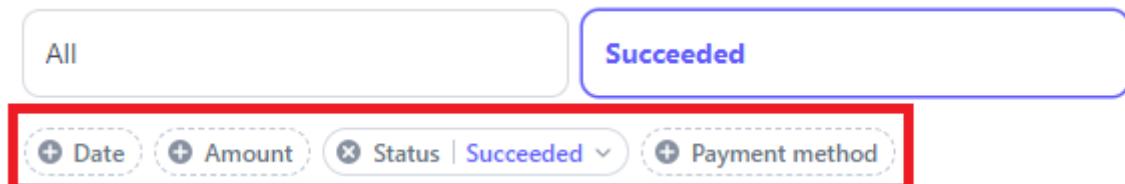
Date Amount Status Succeeded Payment method

Export + Create payment

Clear filters

5. Sort to find specific criteria

- Date = *
- Amount = *
- Status = Success
- Payment Method = *



6. The table will update with the sorted information and will present it to you

How To Find Failed Transactions

1. Login into the organization stripe account

The screenshot shows the Stripe sign-in page. It has fields for 'Email' (containing 'ex*****@*****.com') and 'Password' (redacted). There is a 'Forgot your password?' link and a 'Stay signed in for a week' checkbox. A large blue 'Continue' button is at the bottom. Below the button is a link 'Use single sign-on (SSO) instead'.

2. Click on the payments button on the navigation bar



3. Click on the All Payments button

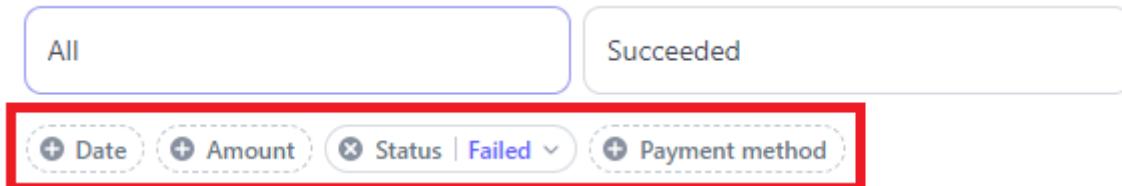
The screenshot shows the Stripe Payments interface. At the top, there's a navigation bar with 'Aspen' and a search bar. Below it, a menu bar includes 'Home', 'Payments' (which is highlighted in blue), 'Balances', 'Customers', 'Products', 'Billing', 'Reports', 'Connect', and 'More'. On the right side of the menu bar are 'Create', 'Help', 'Settings', and a user profile icon. A red box highlights the 'All' tab under the 'All payments' section. The main area is titled 'Payments' and shows tabs for 'Overview', 'Fraud & risk', and 'Payment links'. Below these are buttons for 'All', 'Succeeded', 'Refunded', 'Uncaptured', and 'Failed'. At the bottom of the interface are filter options for 'Date', 'Amount', 'Status', and 'Payment method'.

4. Click on the failed tab

This screenshot shows the same Stripe Payments interface as the previous one, but with a different filter applied. A red box highlights the 'Failed' tab under the 'All payments' section. The rest of the interface is identical to the first screenshot, including the navigation bar, menu bar, and main payment summary area.

5. Sort to find specific criteria

- Date = *
- Amount = *
- Status = Failed
- Payment Method = *



6. The table will update with the sorted information and present it to you

Stripe Feature Edit

On your stripe account there are a few different customizable options that can be taken to ensure that your users feel more at ease and secure when donating to the charity. Such as colors, logos, and icons that can be set by the admin of the stripe account. You will also want to ensure that automated emails are being sent out to the person who has donated.

How To Edit Auto Email Receipt

1. Login into the organization stripe account

Sign in to your account

Email

Password [Forgot your password?](#)

Stay signed in for a week

[Use single sign-on \(SSO\) instead](#)

2. Go to settings



3. Go to the Branding link in "Bussiness Settings" in the "Your Business" box

Product settings

 Payments Accept payments globally. Checkout and Payment Links Payment methods Automatic currency conversion Link settings	 Billing Create and manage subscriptions and invoices. Billing plans Subscriptions and emails Invoice template Quote template Customer portal	 Radar Monitor fraud with machine learning. Settings
 Climate Counteract climate change. Settings	 Revenue Recognition Simplify accrual accounting with automated reporting. Settings	

Business settings

- Your business
 - [Account details](#)
 - [Public details](#)
 - [Business details](#)
 - [Linked external accounts](#)
 - [External payout accounts and scheduling](#)
 - [Tax details](#)
 - [Branding](#) 
 - [Custom domains](#)
 - [Customer emails](#)

- Team and security
 - [Team](#)
 - [Security history](#)
 - [Installed apps](#)

- Reporting and documents
 - [Documents](#)
 - [Legacy exports](#)

4. Set the following information

Settings > [Branding](#)

Branding

Brand elements

Customize how your brand appears globally across the Stripe products your customers use.

Icon 



Logo 



Use logo instead of icon

Brand color 



Accent color 

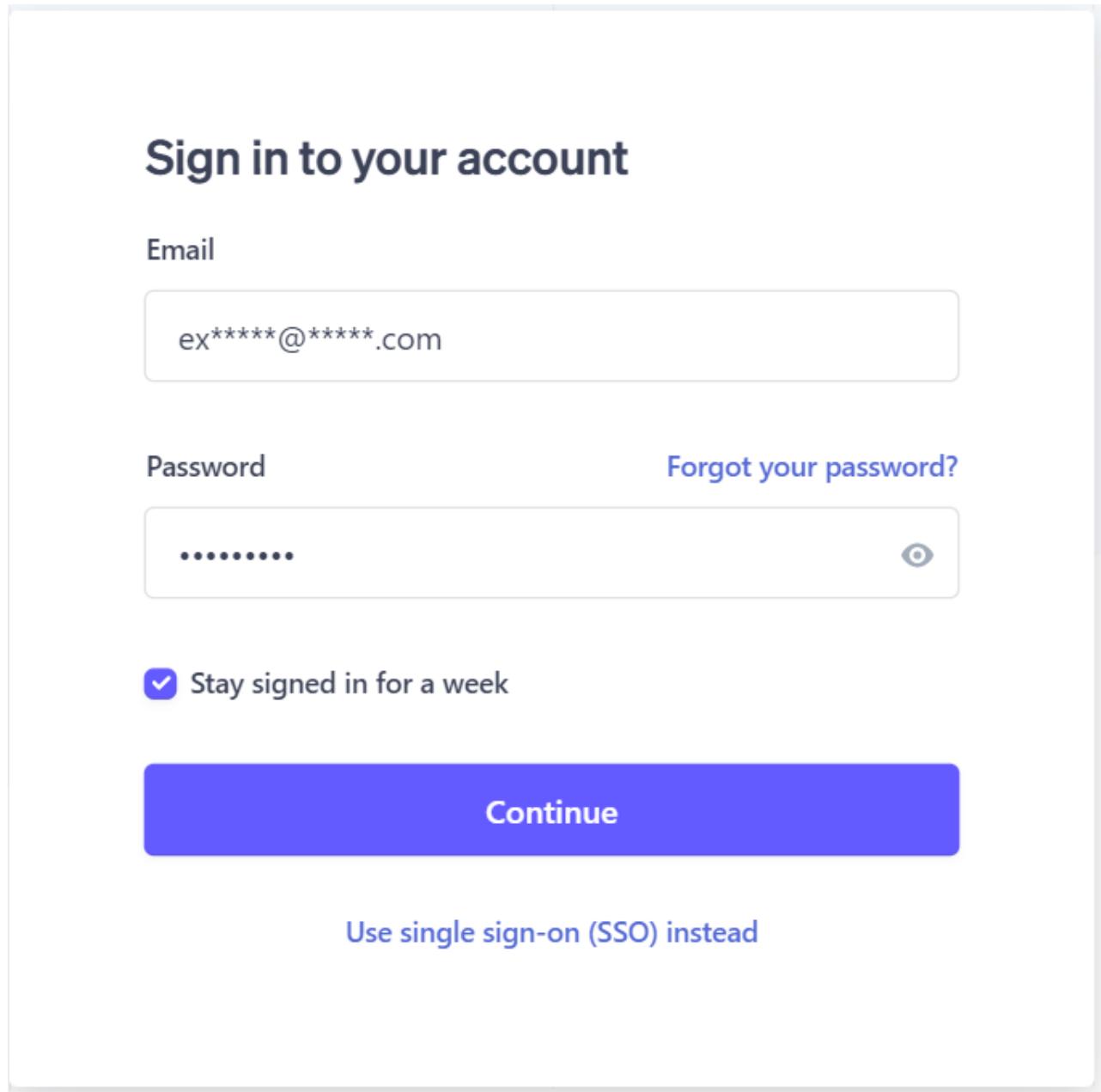


- Set the Icon (if you have one)
- Set the Logo (if you have one)
- Changes the colors to match your organization's colors

5. After you finish making your changes click the save button at the top right of the screen
6. The Automated Email will now resemble the changes you have made

How To Edit Checkout Page

1. Login into the organization stripe account



2. Go to settings



3. Go to the Branding link in "Business Settings" in the "Your Business" box

Product settings

<p> Payments Accept payments globally. Checkout and Payment Links Payment methods Automatic currency conversion Link settings</p>	<p> Billing Create and manage subscriptions and invoices. Billing plans Subscriptions and emails Invoice template Quote template Customer portal</p>	<p> Radar Monitor fraud with machine learning. Settings</p>
<p> Climate Counteract climate change. Settings</p>	<p> Revenue Recognition Simplify accrual accounting with automated reporting. Settings</p>	

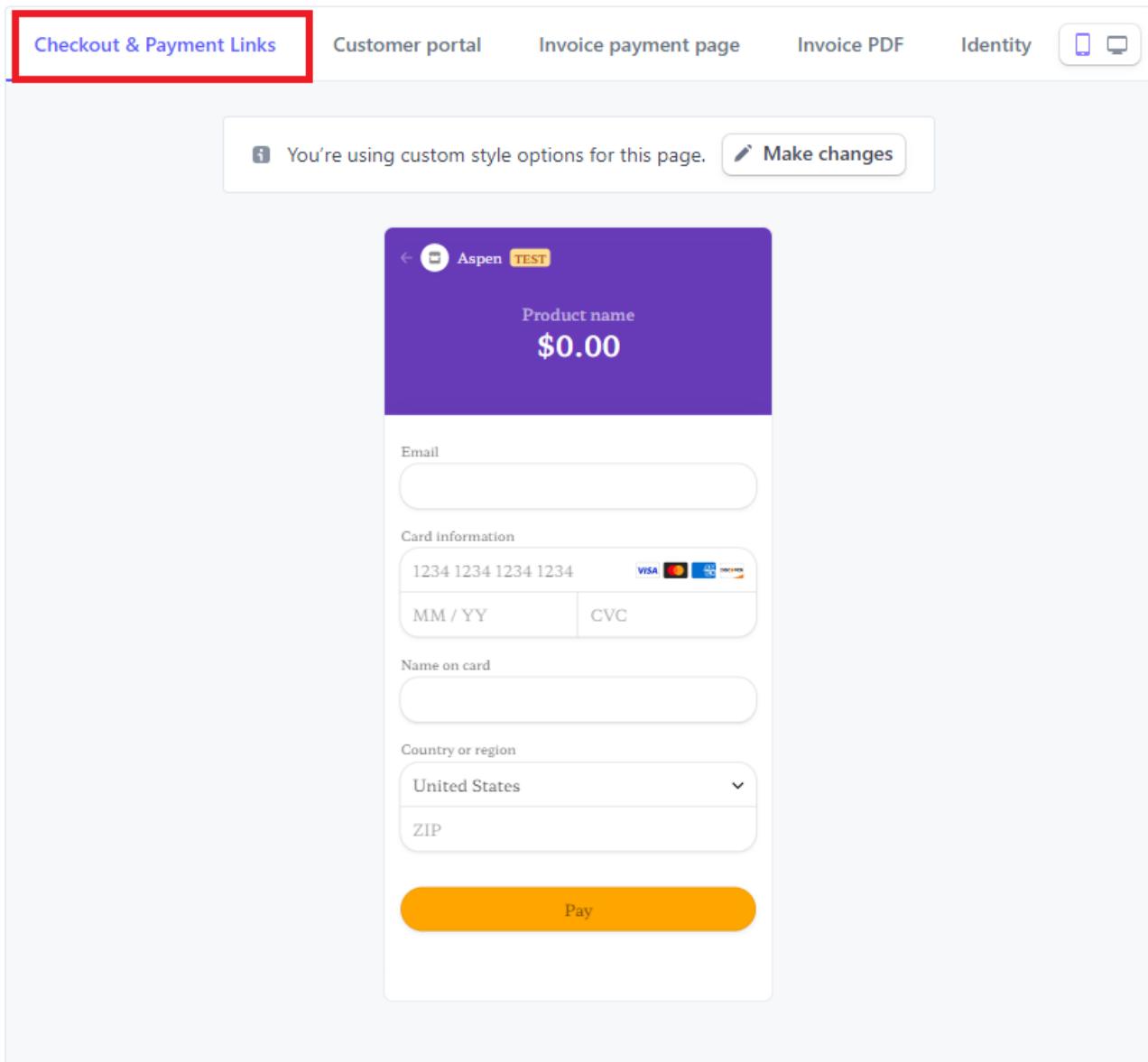
Business settings

- Your business
 - [Account details](#)
 - [Public details](#)
 - [Business details](#)
 - [Linked external accounts](#)
 - [External payout accounts and scheduling](#)
 - [Tax details](#)
 - [Branding](#) 
 - [Custom domains](#)
 - [Customer emails](#)

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4. Make sure you are on the Checkout & Payment Links tab



The screenshot shows the Stripe dashboard with the "Checkout & Payment Links" tab highlighted with a red box. The page displays a purple payment form for a product named "Aspen TEST" with a price of \$0.00. The form includes fields for Email, Card information (with sample card number 1234 1234 1234 1234 and payment method icons), Name on card, Country or region (United States), and ZIP. A large orange "Pay" button is at the bottom.

Checkout & Payment Links Customer portal Invoice payment page Invoice PDF Identity 

 You're using custom style options for this page.  Make changes

←  Aspen TEST

Product name
\$0.00

Email

Card information

1234 1234 1234 1234 

MM / YY CVC

Name on card

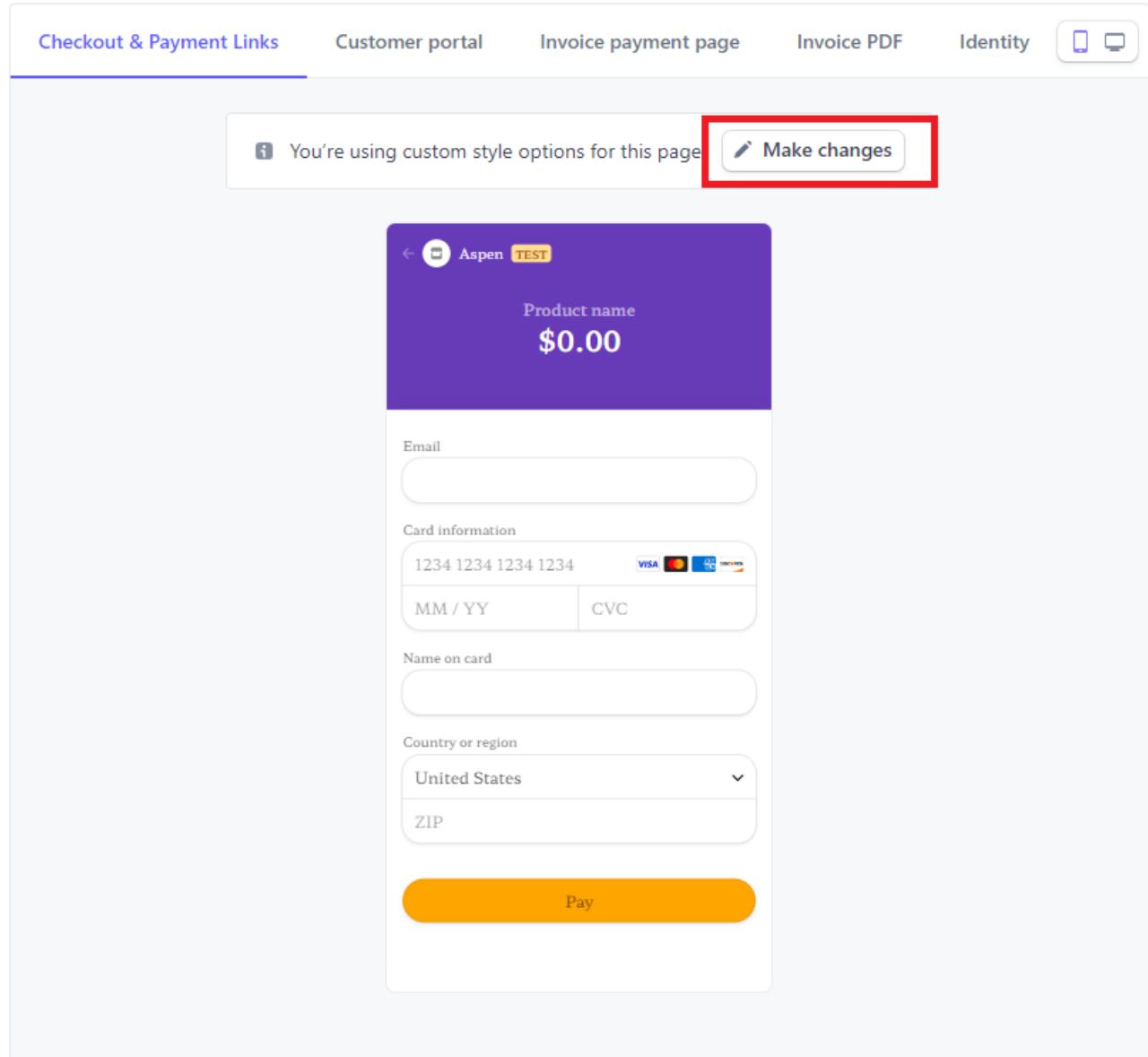
Country or region

United States

ZIP

Pay

5. Click on the Make Changes button



6. Change the following information:

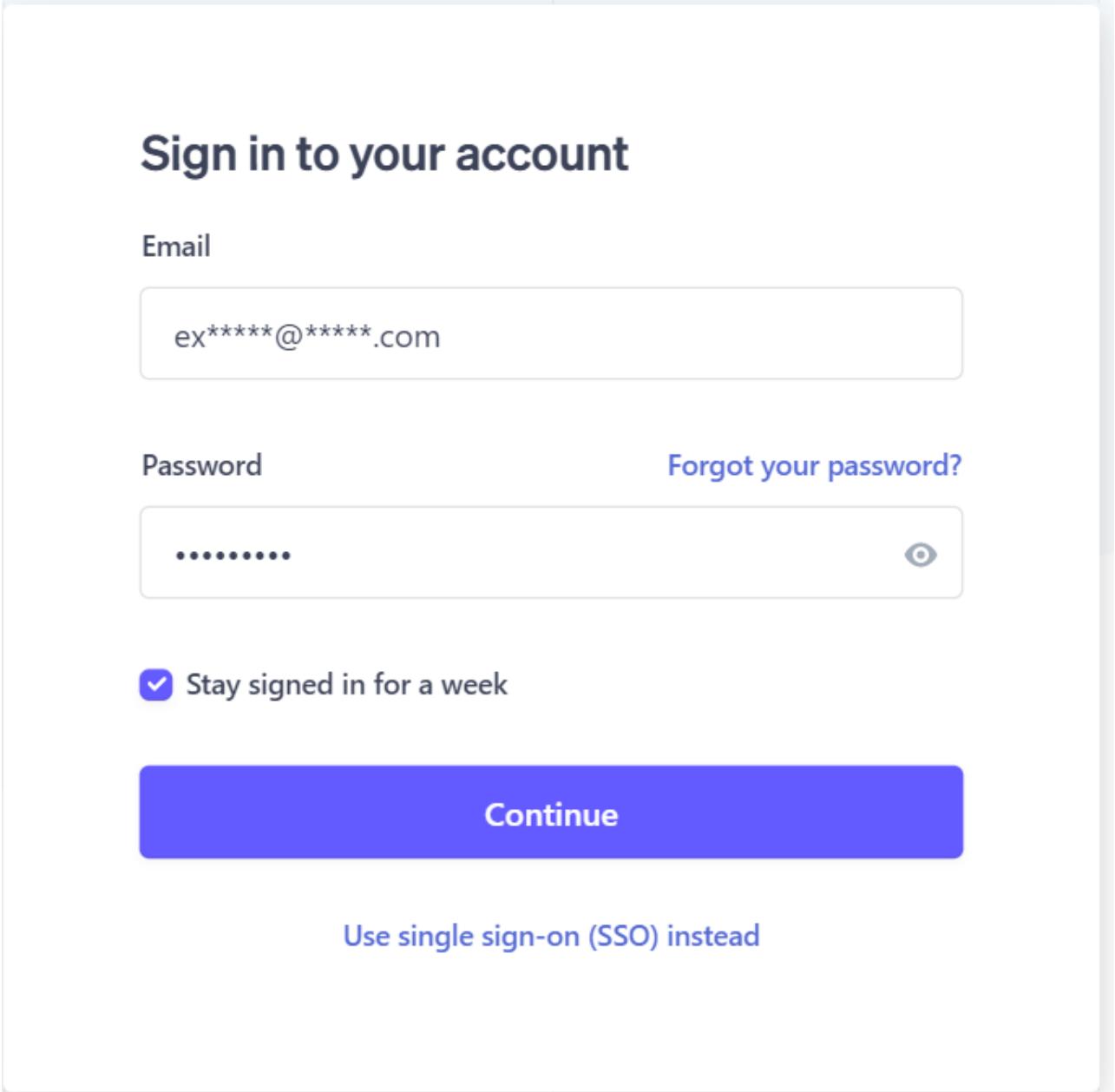
The screenshot shows the 'Branding' section of the Admin Guide. At the top, there's a back arrow labeled 'Brand elements' and a title 'Checkout styling'. Below this, under 'Styling options', it says 'Customize how your brand appears in your Checkout experience.' There are two color swatches: one for 'Background' (#673ab7) and one for 'Button' (#ffa500). Under 'TYPOGRAPHY', the font 'Hahmlet' is selected. Under 'STYLES', the shape 'Pill' is selected. A checkbox for 'Use brand colors' is present but unchecked.

- o Change the colors to match your organization's colors
- o Change the font
- o Change the button style

7. After you finish making your changes click the save button at the top right of the screen

How To Ensure That Auto Email Recipients Is Enabled

1. Login into the organization stripe account



The screenshot shows the Stripe sign-in interface. At the top, it says "Sign in to your account". Below that is an "Email" field containing "ex*****@*****.com". To the right is a "Forgot your password?" link. Below the email field is a "Password" field with masked input and an "Eye" icon for password visibility. Underneath the password field is a checked checkbox labeled "Stay signed in for a week". A large blue "Continue" button is centered below these fields. At the bottom, there is a link to "Use single sign-on (SSO) instead".

2. Go to settings



3. Go to the Customer Emails link in "Business Settings" in the "Your Business" box

Product settings

 Payments Accept payments globally. Checkout and Payment Links Payment methods Automatic currency conversion Link settings	 Billing Create and manage subscriptions and invoices. Billing plans Subscriptions and emails Invoice template Quote template Customer portal	 Radar Monitor fraud with machine learning. Settings
 Climate Counteract climate change. Settings	 Revenue Recognition Simplify accrual accounting with automated reporting. Settings	

Business settings

Your business

[Account details](#)
[Public details](#)
[Business details](#)
[Linked external accounts](#)
[External payout accounts and scheduling](#)
[Tax details](#)
[Branding](#)
[Custom domains](#)
[Customer emails](#) 

Team and security

[Team](#)
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Reporting and documents

[Documents](#)
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4. Ensure that the successful payments option is turned on.

Settings > [Customer emails](#)

Customer emails

Email customers about...

 Successful payments 
 Refunds
 To manage emails about invoices, failed payments, and more, visit [Billing settings](#) →

Debit emails

 Send Canada PAD mandate, debit initiation, and microdeposit verification emails 

 Send BECS Australia mandate and debit initiation emails 

 Send SEPA debit initiation emails 

 Send ACH Direct Debit mandate and microdeposit verification emails 

Bank Transfer payments

 Send payment instruction emails 

Support email

Email replies will go to venturian6@gmail.com based on your [Public details settings](#) →Default language 

English

Having trouble sending email receipts? →

Save

- Note: This will make automated emails be sent out to those who made successful donations to the charity

5. Check any other settings for automated emails with other settings here as well and modify as needed

6. Click save at the bottom right of the Customer Emails section

7. Your Settings have been saved