Admin Guide

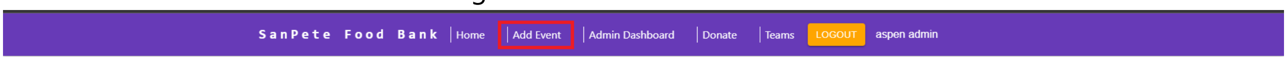
Manage Events

> An event is a current activity/fundrasing campagin/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.

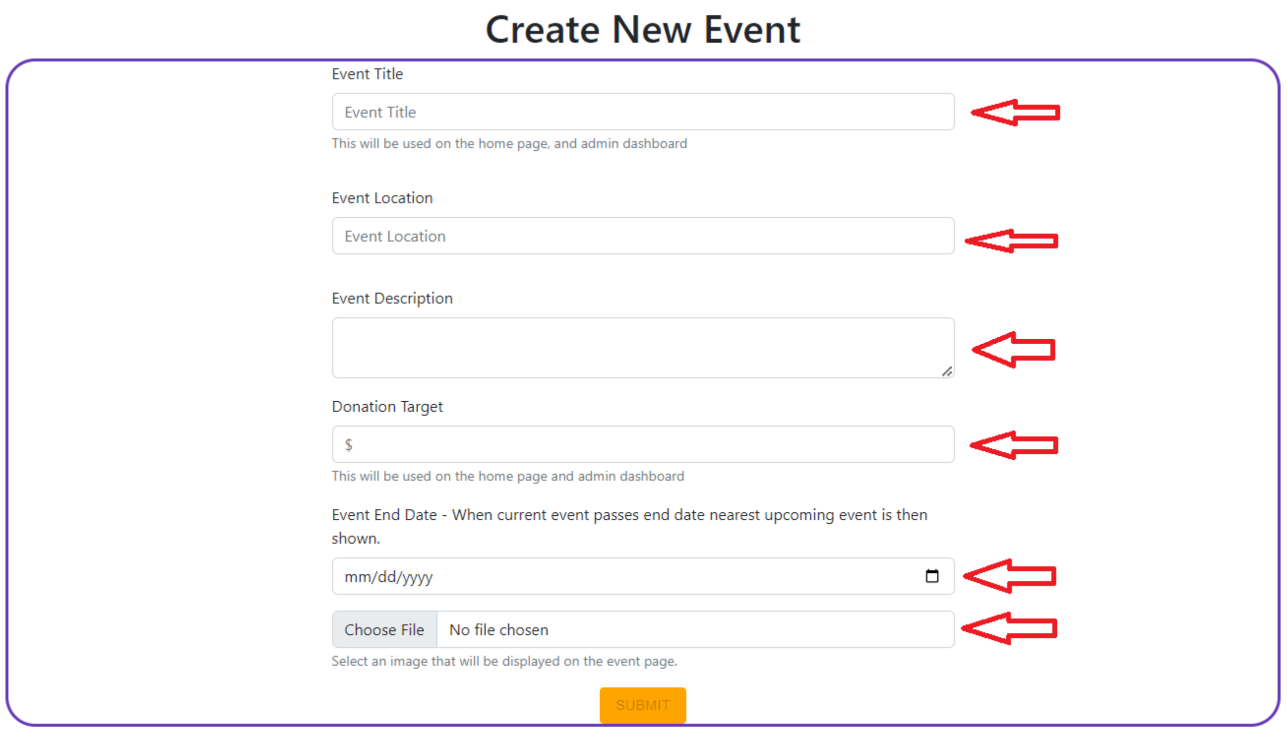
How To Create An Event

1. Login as Admin

2. Click on Add Event button on the navigation bar



3. Fill out info



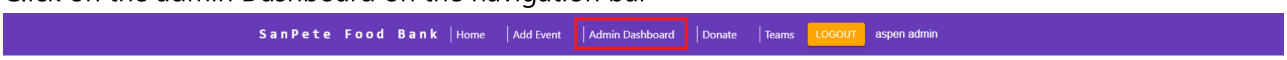
- Notes:
  - The Event Title will be seen on the home page.
  - The Event Location (if there is no physical location just put the location as online) will be seen in the event details window (when a user asks to see event details), same goes for the event description.
  - The Donation target is the amount 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 visability. 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.

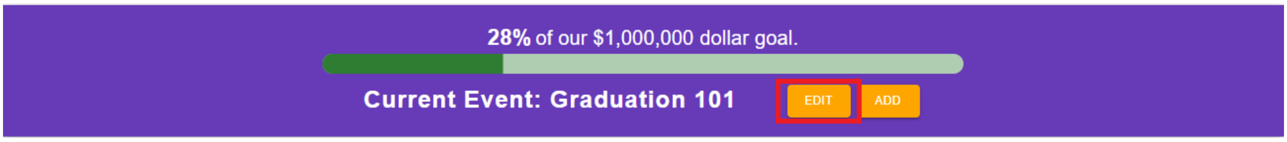
How To Edit An Event

1. Login as Admin

2. Click on the admin Dashboard on the navigation bar



3. Click the edit button on the current event

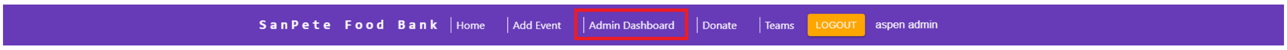


4. Change the information you need to
5. Click save
6. The event has been edited

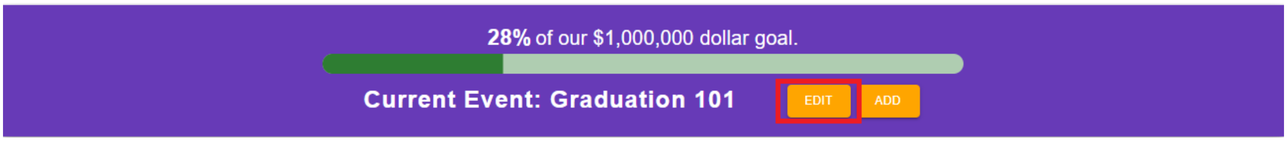
How To Delete An Event

1. Login as Admin

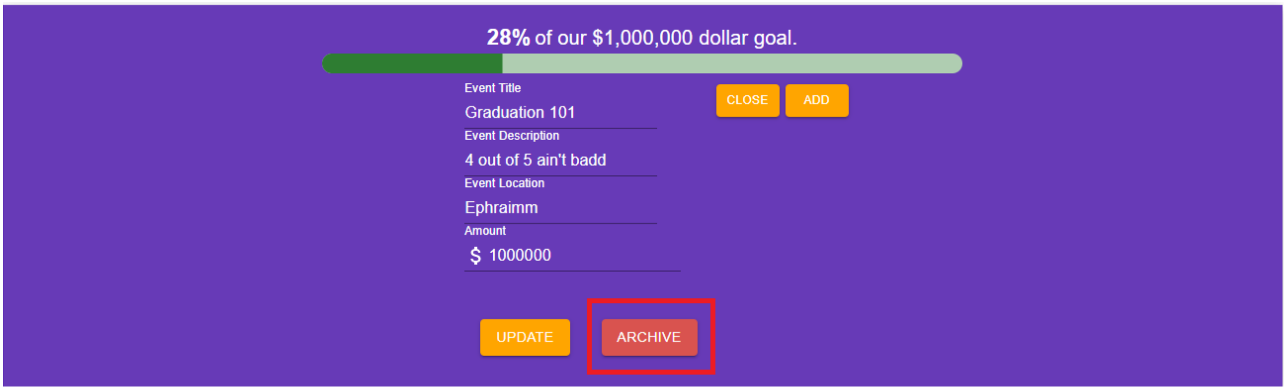
2. Click on the admin Dashboard on the navigation bar



3. Click on the edit button on the current event

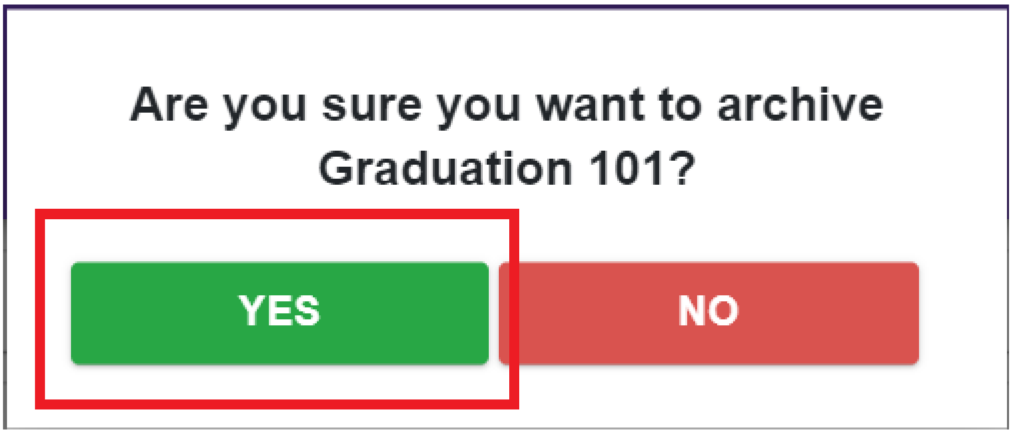


4. Click the archive button



   - 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

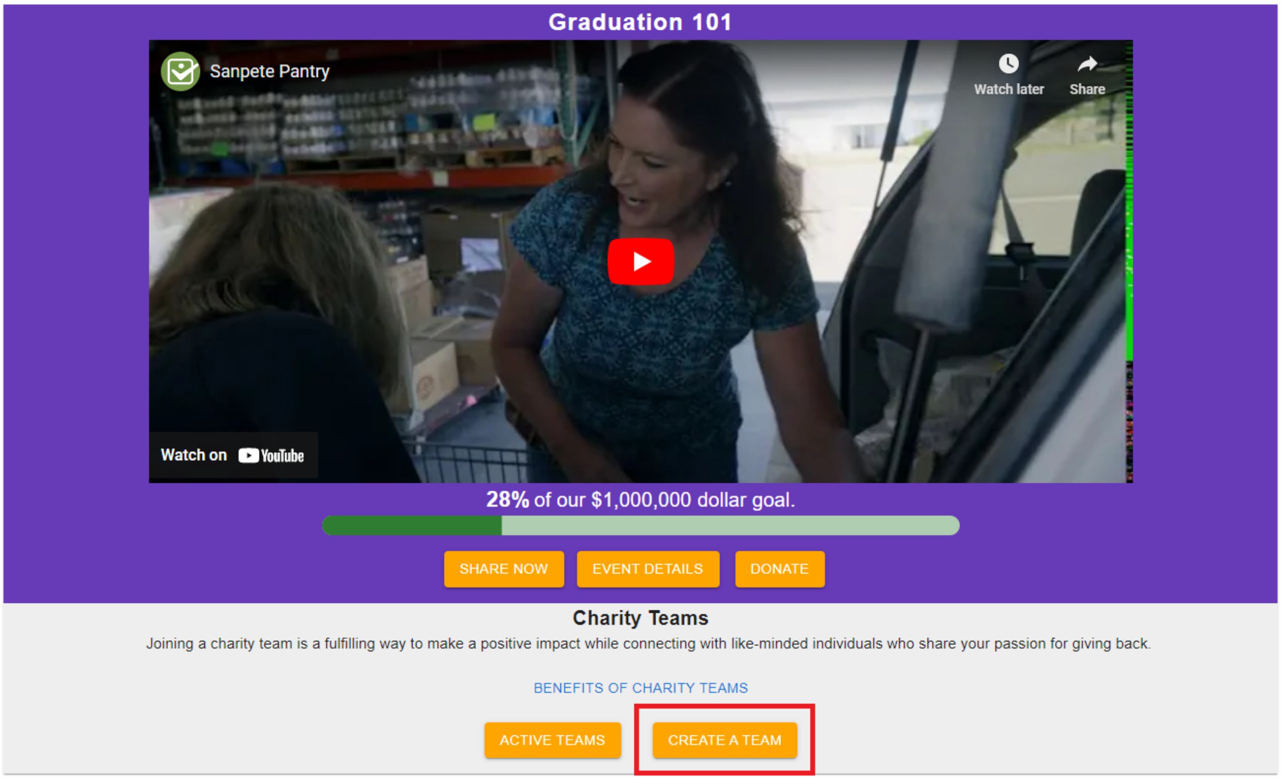
> This application supports the idea of team centered fundrasing campaigns/events. Hopefully having a smaller team with a team owner will lead to a greater team member participation in the campagin/event.

> 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.

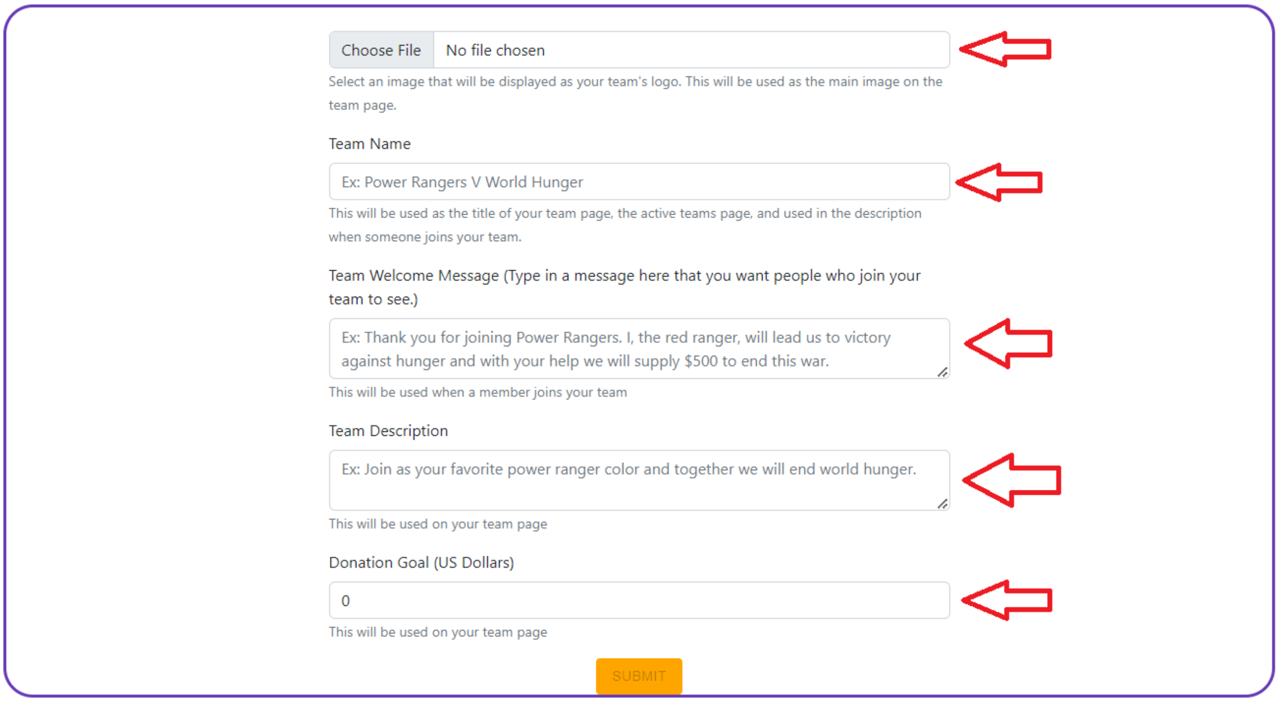
> As an administrator you can review the teams users have made. You can delete a team, you can edit a team, you can remove misbehaving memebers from a team.

FYI: How Users Create Teams

1. Login


2. Click Create a Team button


3. Fill out the information and click submit



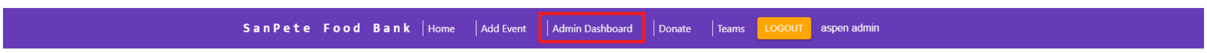
   - Notes:
     - The image chosen will be used as the visual image of your team on your team page.
     - The Team Name will be used as the visual factor for all to find the team on the active team's page. As well as of course the title text on the given team page
     - The Team Welcome Message will 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)

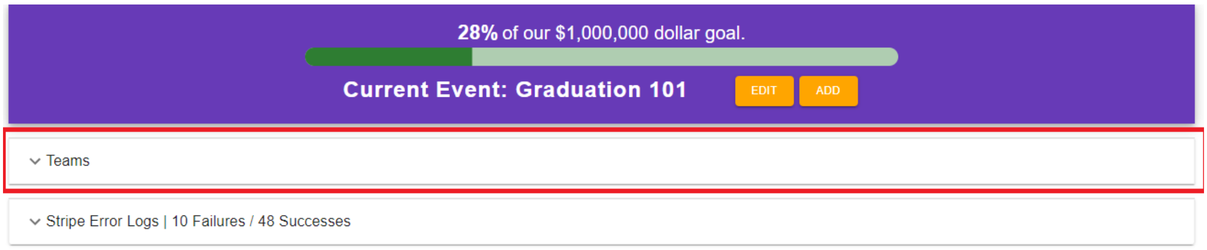
Admin Action: How To Edit A Team

1. There are two ways to edit a team.
2. Method #1
   1. Login as Admin

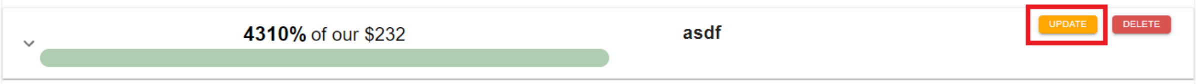
   2. Go to Admin Dashboard



   3. Click on the team accordion

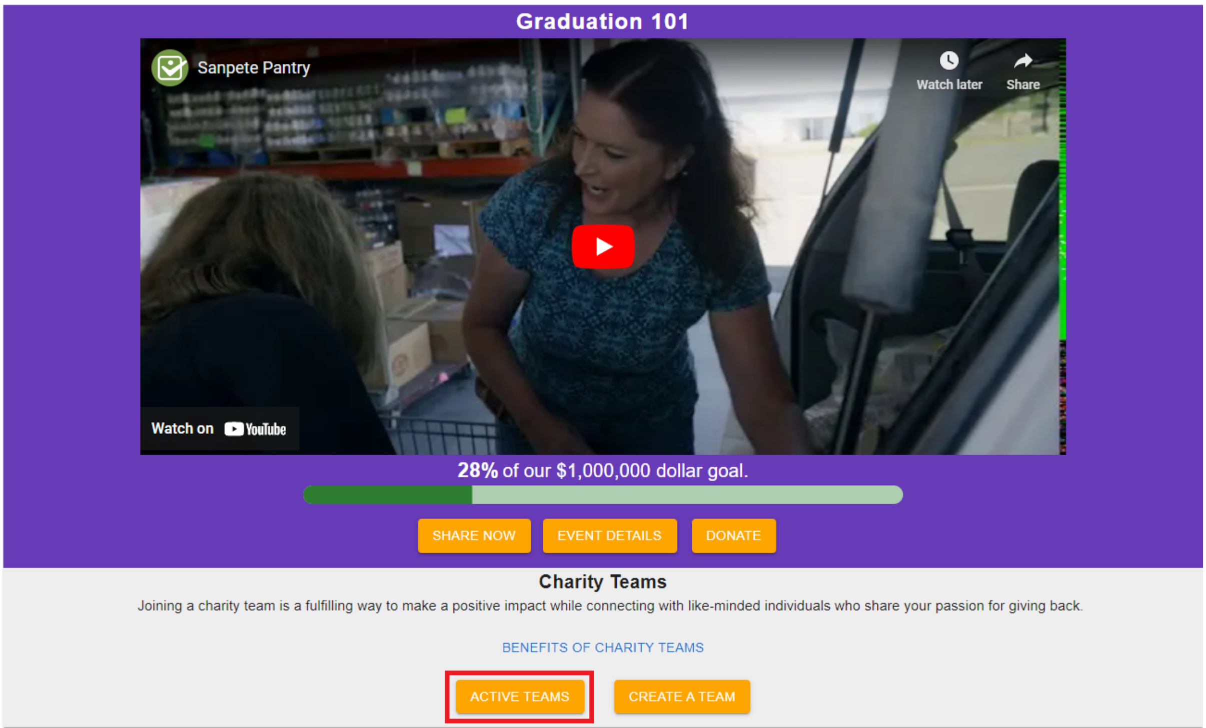


    4. Click the update button

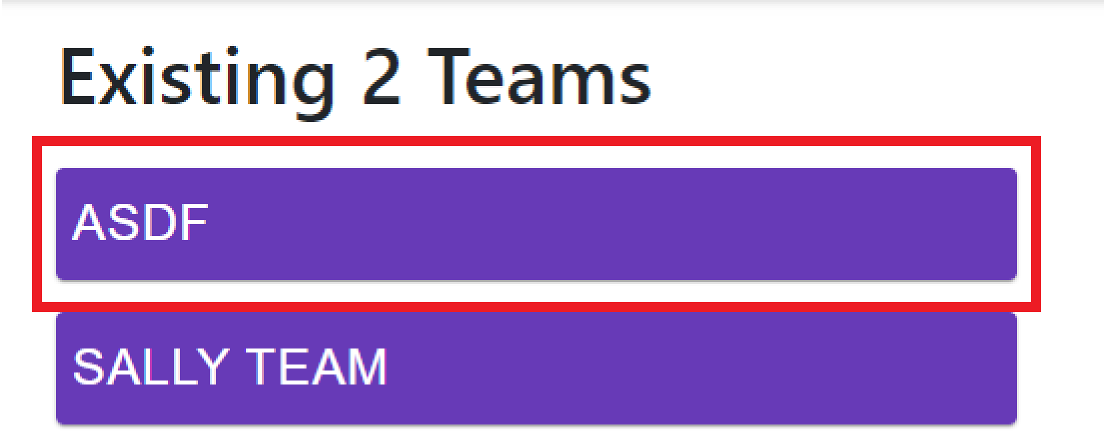


    5. Enter the information you want to be changed
        - Note: An image must be supplied to have the save button become clickable
    6. Click save
    7. The team details have been edited
3. Method #2
    1. Login as Admin

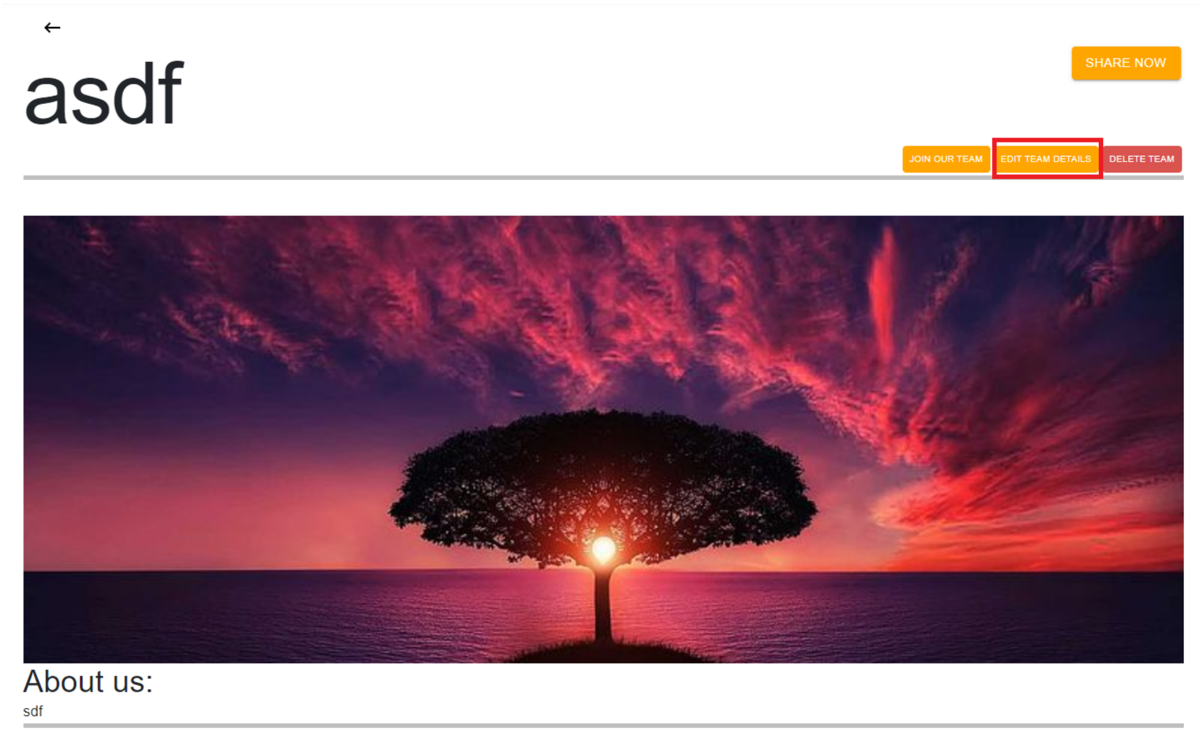
    2. Go to active teams



    3. Go to the team you want to edit



4. Click the edit team details button

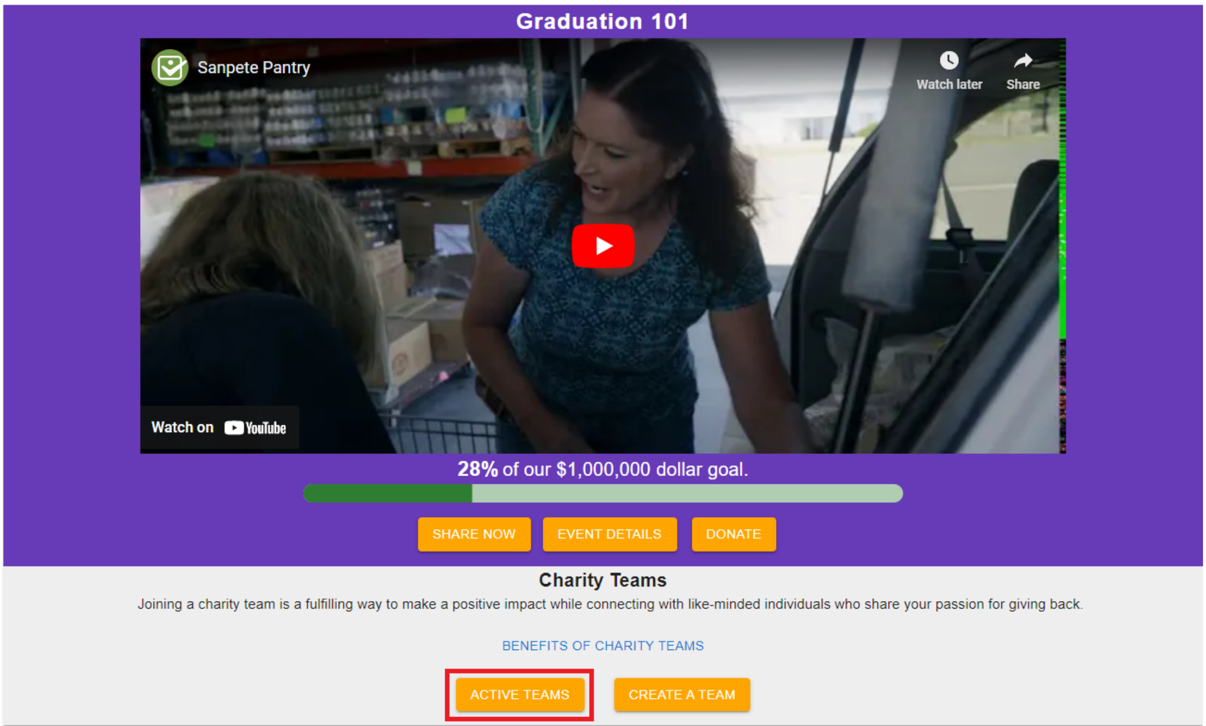


5. Enter the information you want to be changed
    - Note: An image must be supplied to have the save button become clickable
6. Click save
7. The team details have been edited

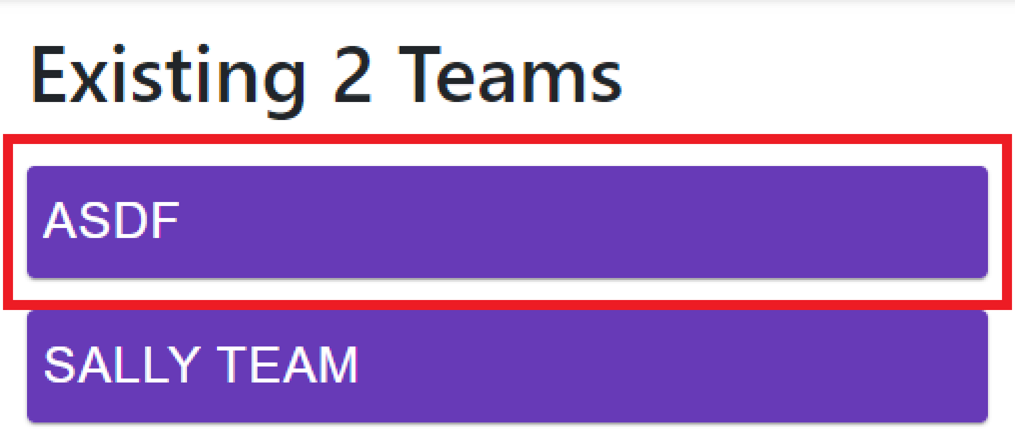
Admin Action: How To Delete A Team

1. Login as Admin

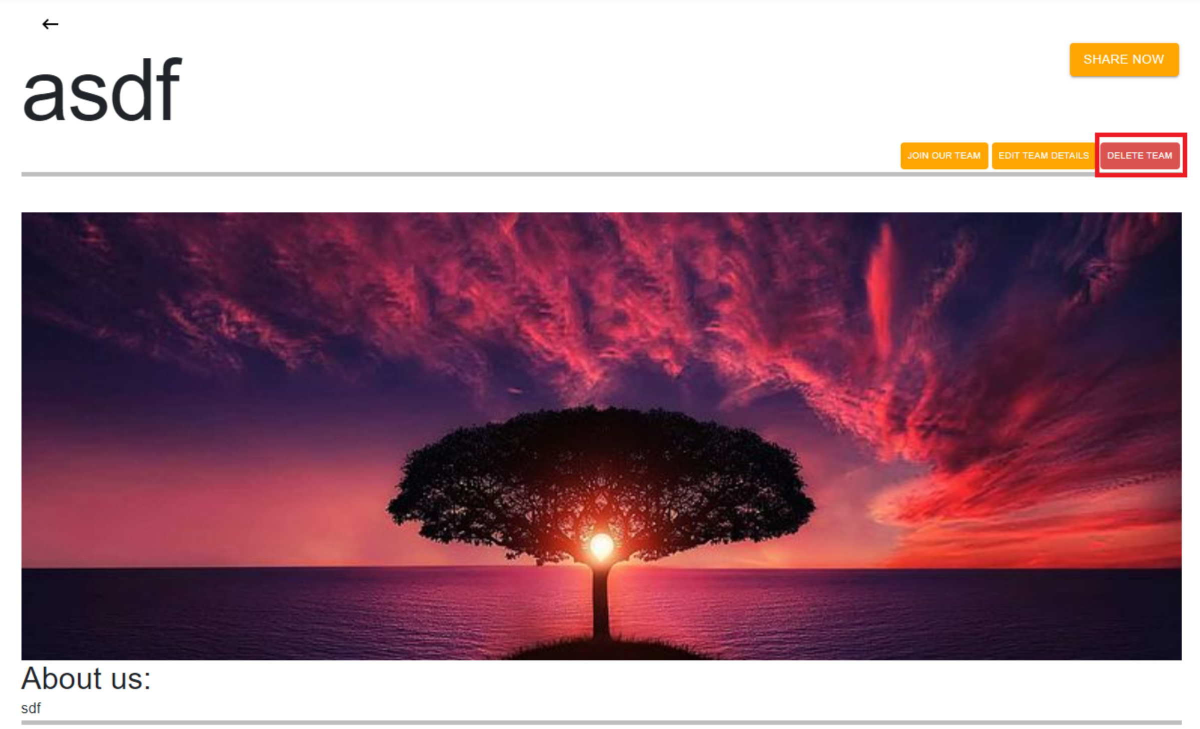
    - There are 2 ways you can delete a team as an admin
2. Method #1
    1. Go to active teams



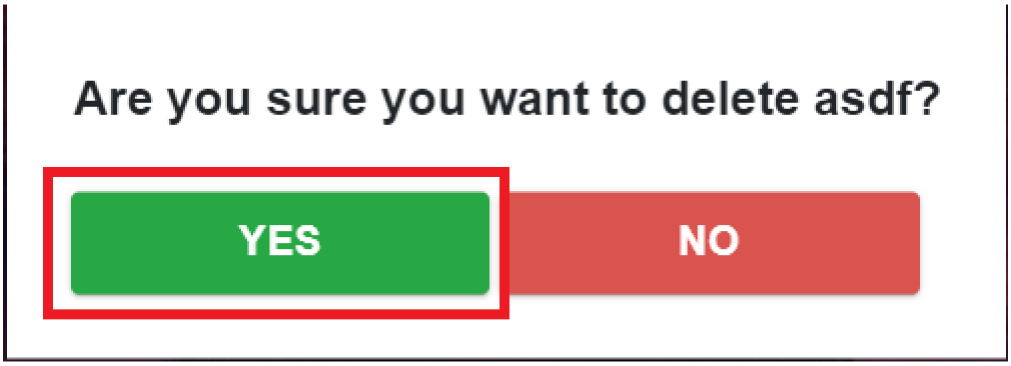
2. Go to the team you want to delete



3. Click the Delete Team button

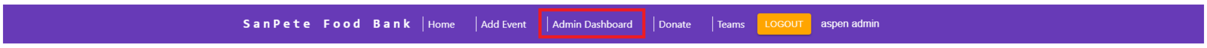


4. Click Yes

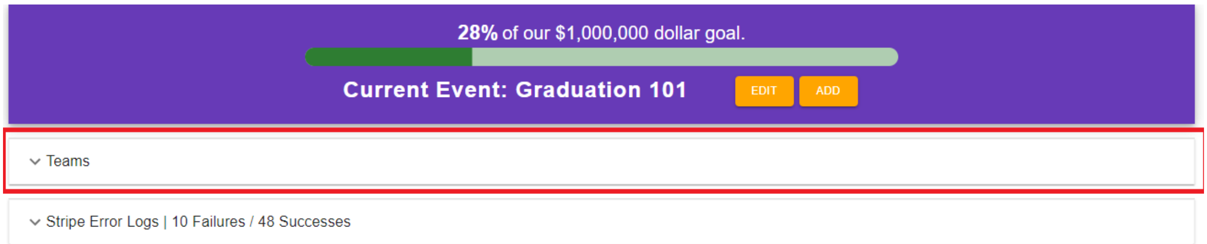


5. The team has been deleted and you will have been redirected to the home page

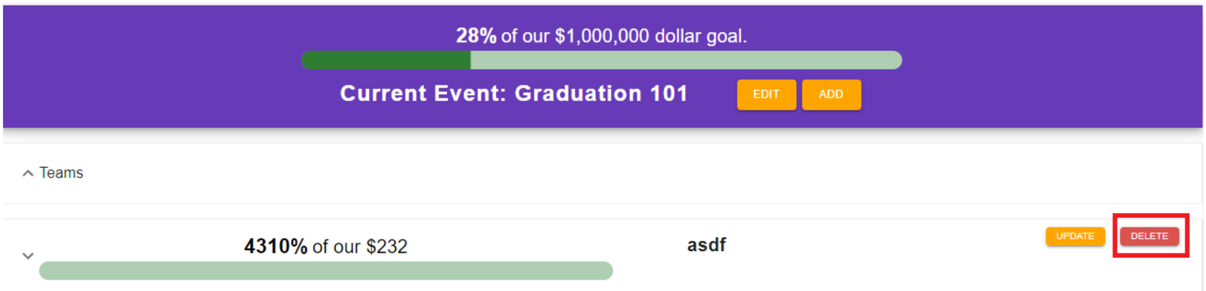
3. Method #2
    1. Go to the admin dashboard



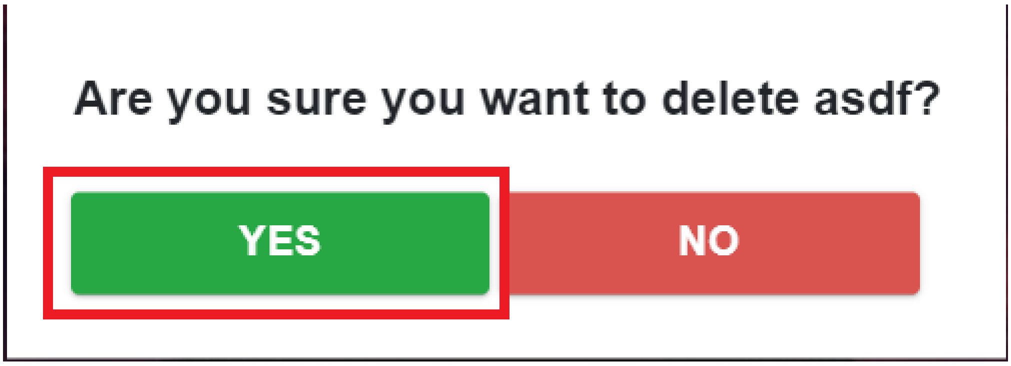
    2. Click on the team accordion



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



    4. Click Yes



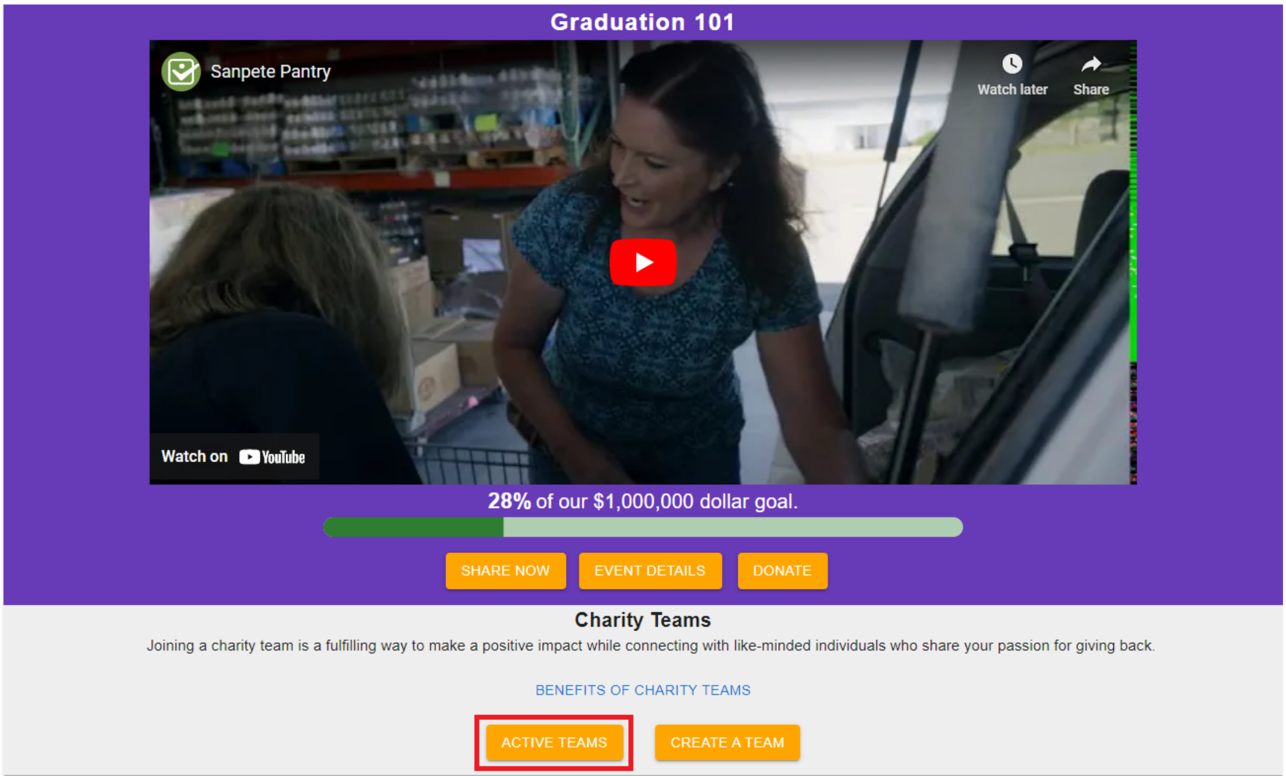
5. The team has been deleted

- 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

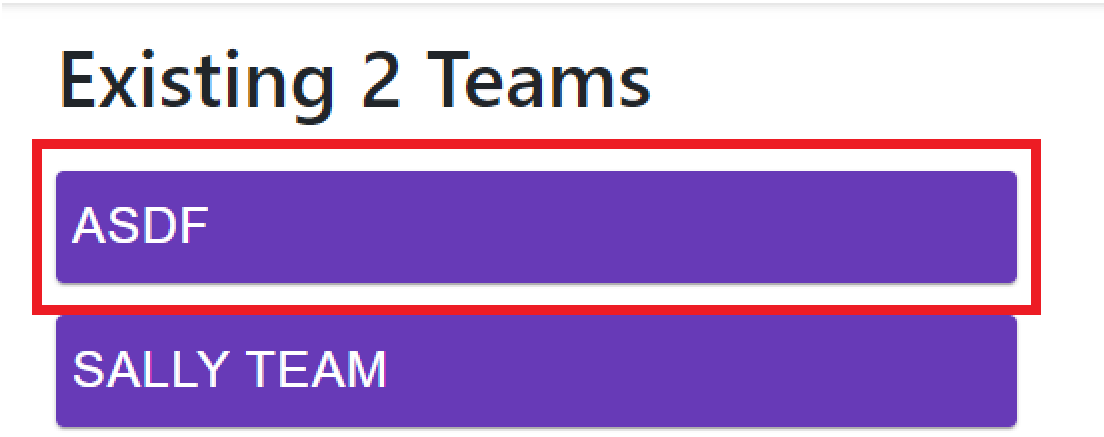
Admin Action: How To Remove a Person From a Team

1. Login as Admin

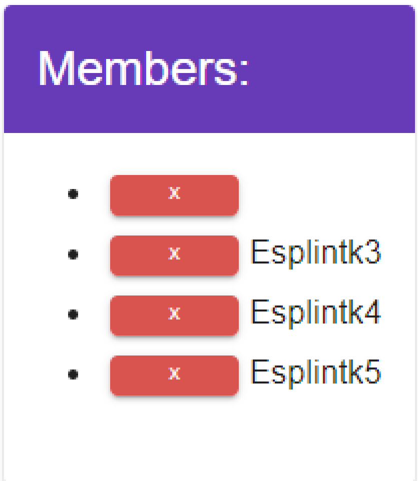
2. Go to the active teams



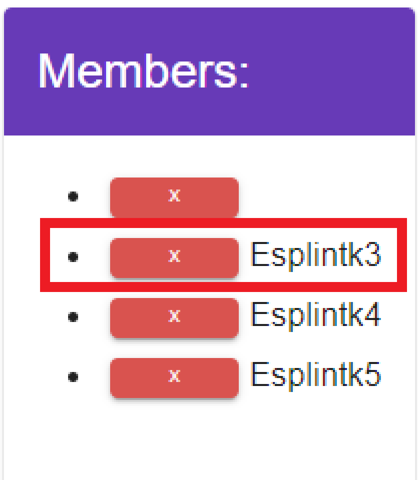
3. Click on the team where the person is located



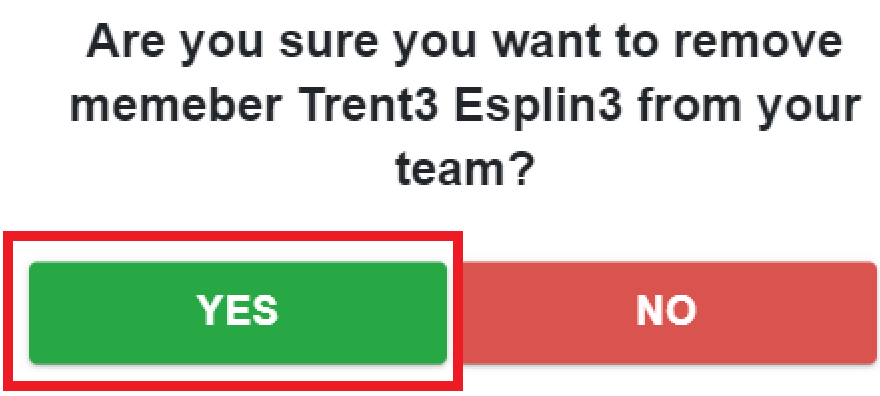
4. Find the person you want to delete in the team member list



5. Click on the X button next to their name



6. Click Yes

> 
>

7. The person has been removed from the team

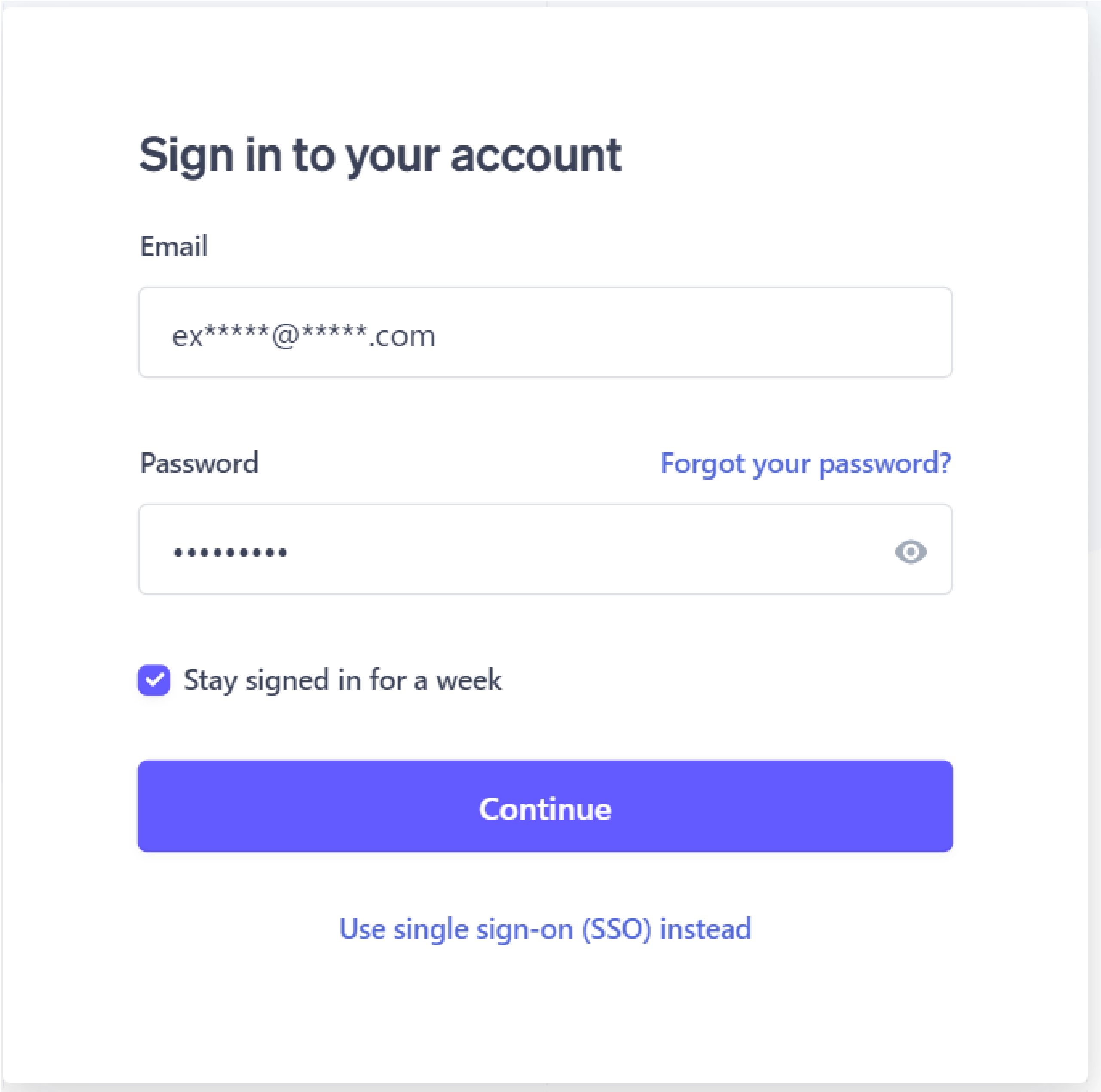
- Notes:
  - If the only person on the team is the team owner you will not be able to remove them from the team. Instead, you will have to delete the team
  - Removing a person from the team does not remove them from the charity event/system they simply have their association with the team removed. They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

Stripe Reports

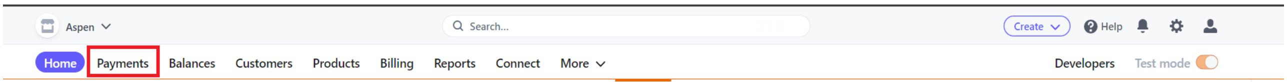
> Stripe reports are a great way to see a history of all transactions made for an event. You can also check Stripe to see all failing transactions if there are any, and the reason why they are failing. This of course can also be found on the admin dashboard where it presents all failed transactions for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

How To Find Successful Transactions

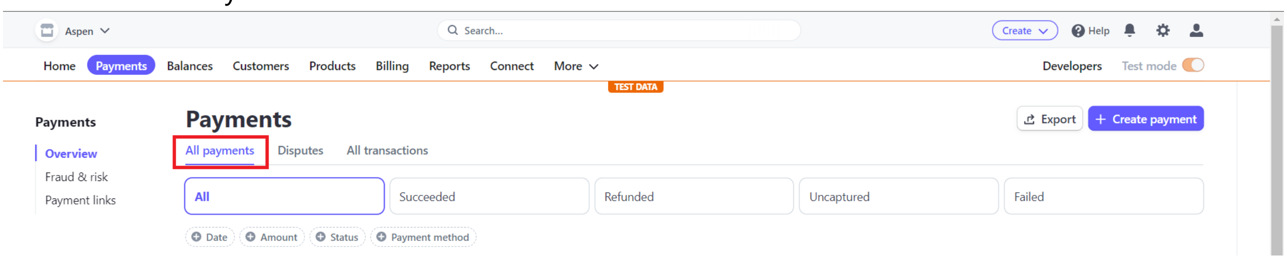
1. Login into the organization stripe account



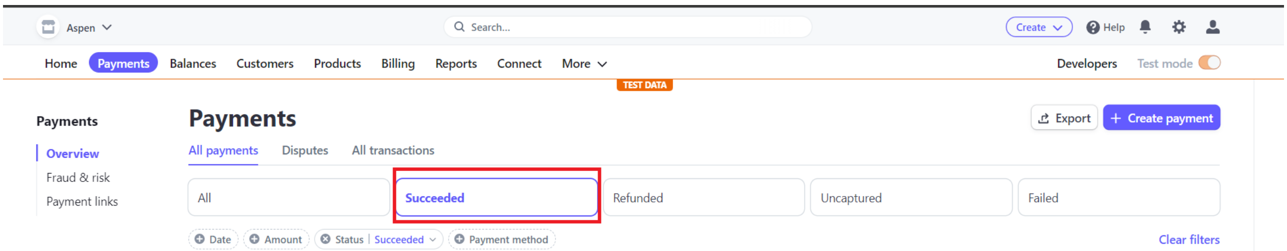
2. Click on the payments button on the navigation bar



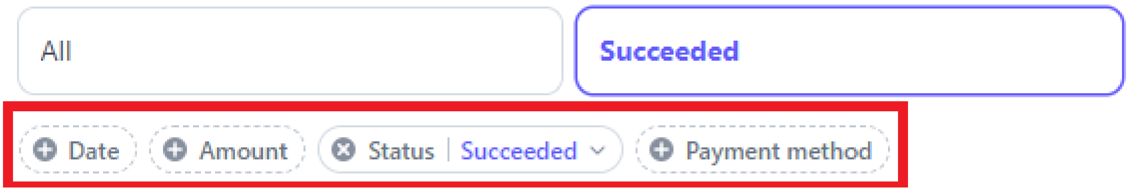
3. Click on the All Payments button



4. Click on the succeeded tab



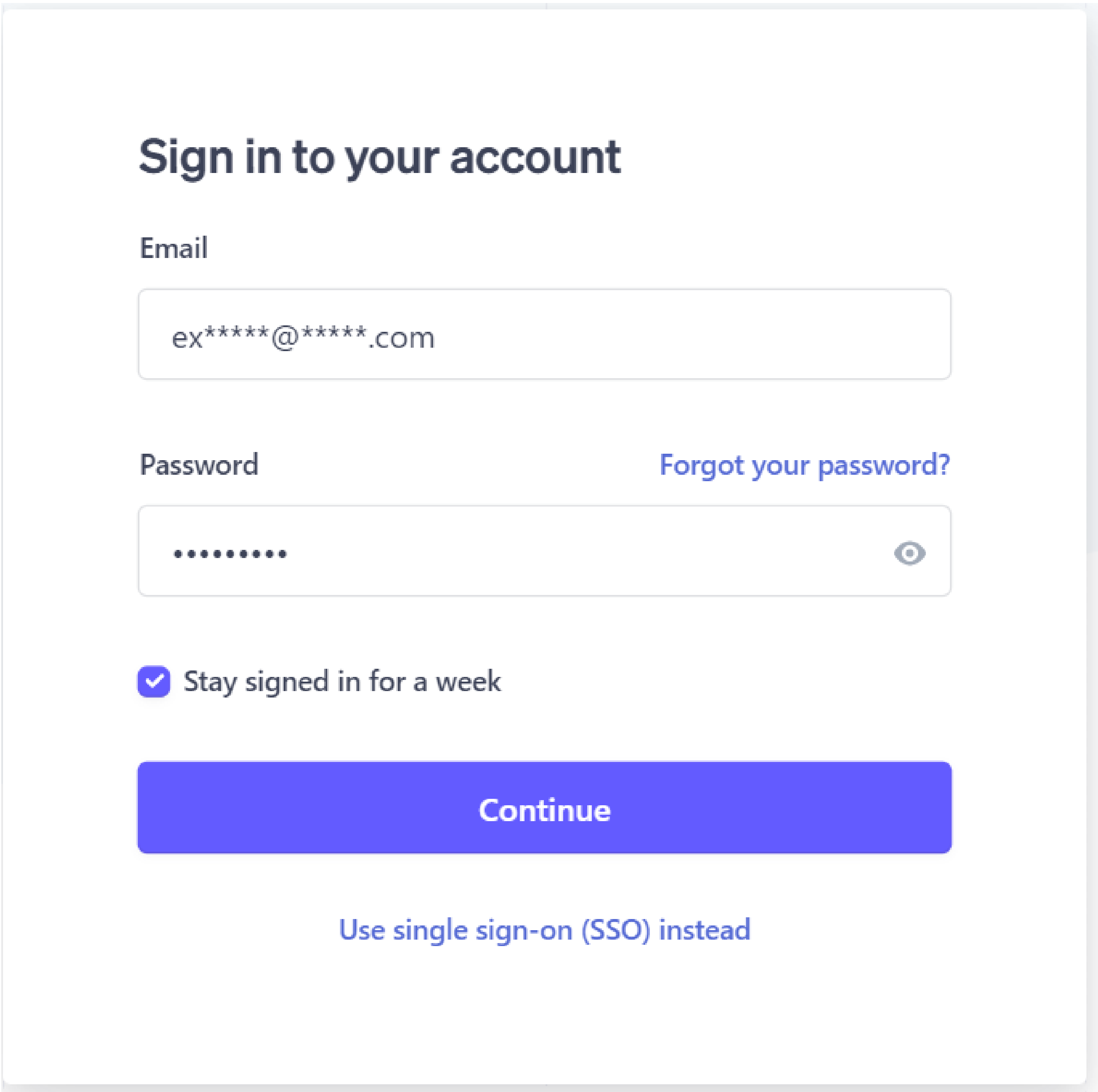
5. Sort to find specific criteria
    - Date = *
    - Amount = *
    - Status = Success
    - Payment Method = *



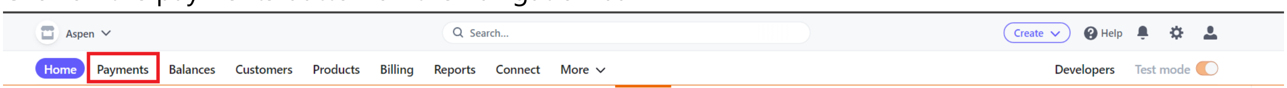
6. The table will update with the sorted information and will present it to you

How To Find Failed Transactions

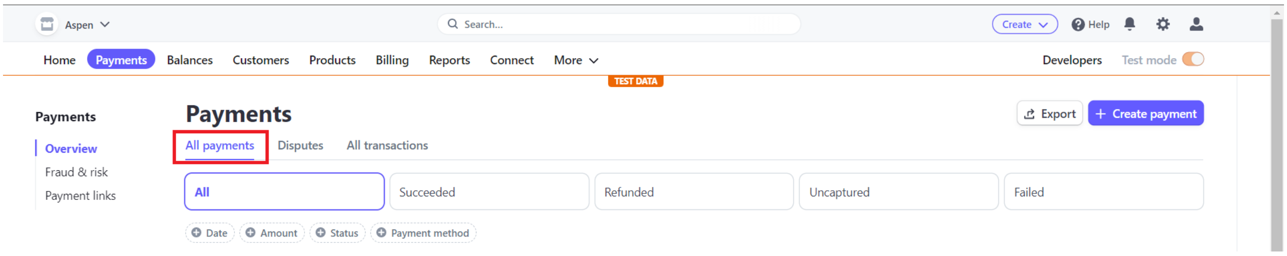
1. Login into the organization stripe account



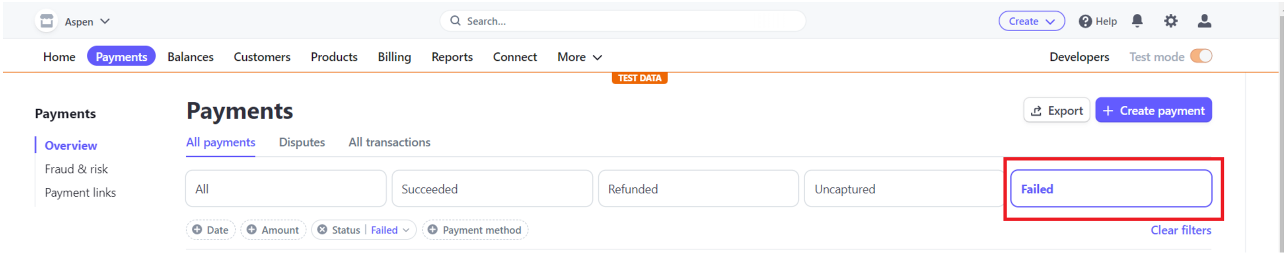
2. Click on the payments button on the navigation bar



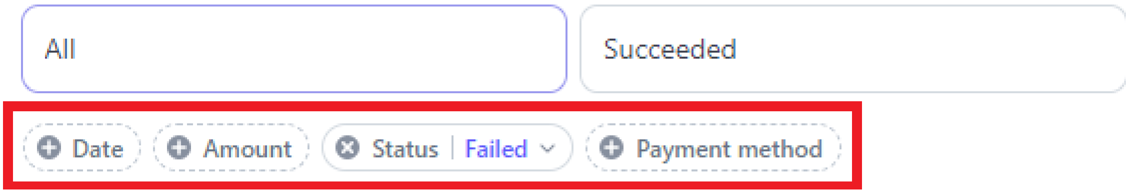
3. Click on the All Payments button



4. Click on the failed tab



5. Sort to find specific criteria
   - Date = *
   - Amount = *
   - Status = Failed
   - Payment Method = *



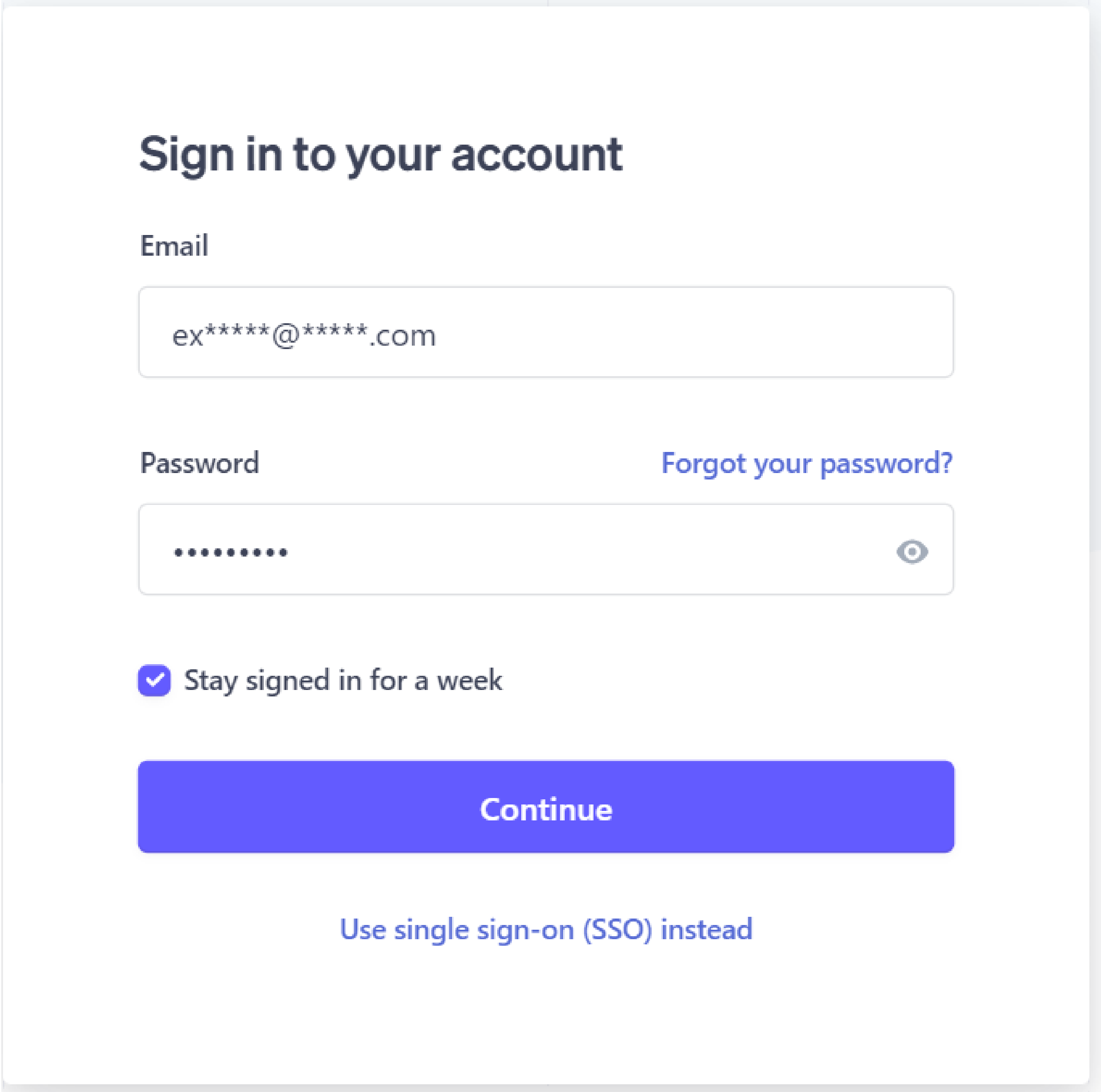
6. The table will update with the sorted information and present it to you

Stripe Feature Edit

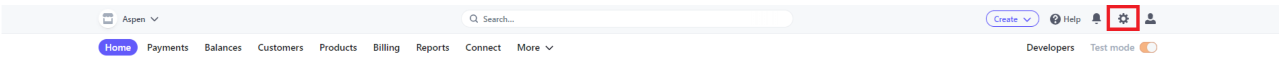
> On your stripe account there are a few different customizable options that can be taken to ensure that your users feel more at ease and secure when donating to the charity. Such as colors, logos, and icons that can be set by the admin of the stripe account. You will also want to ensure that automated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

How To Edit Auto Email Receipt

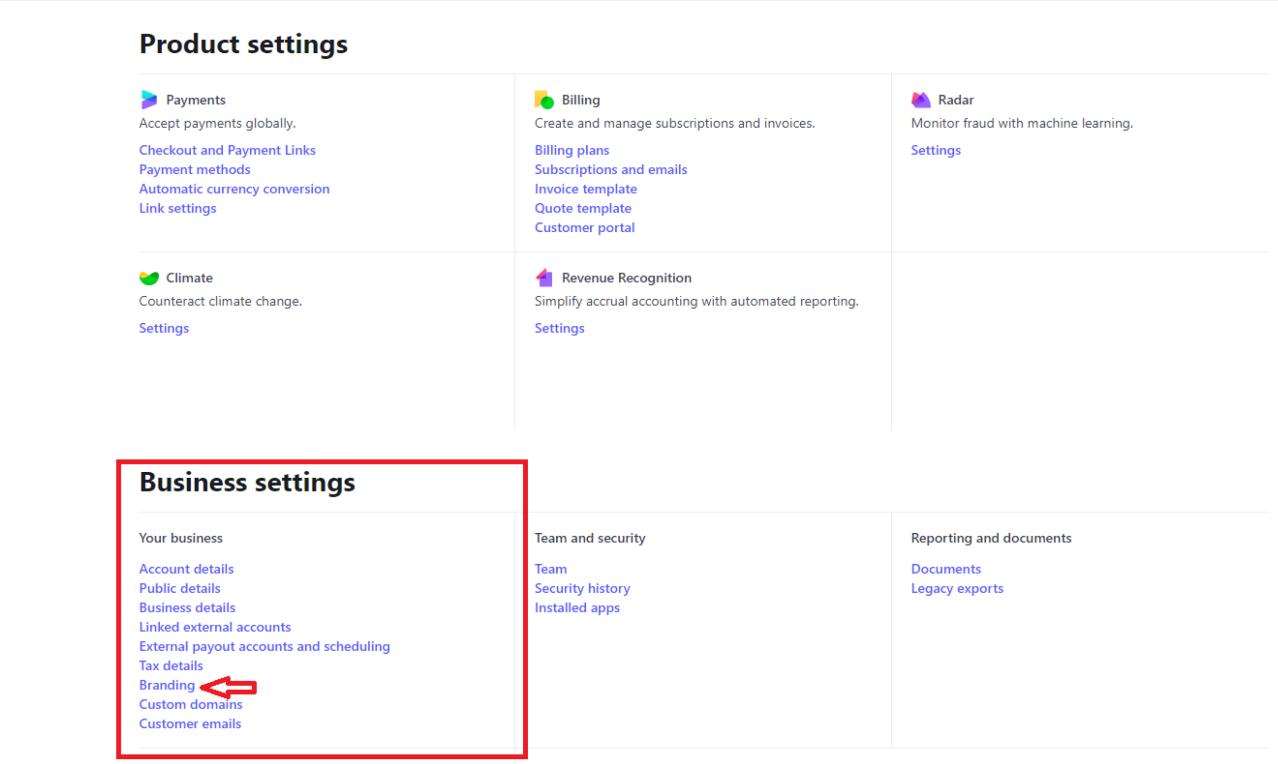
1. Login into the organization stripe account



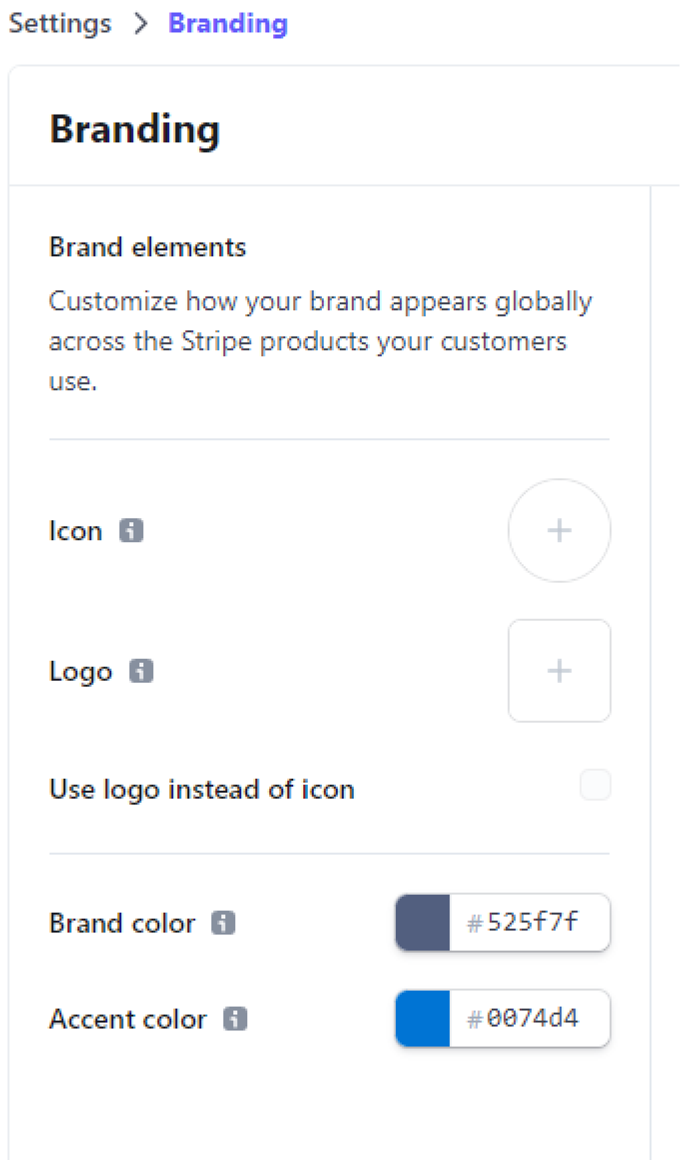
2. Go to settings



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



4. Set the following information

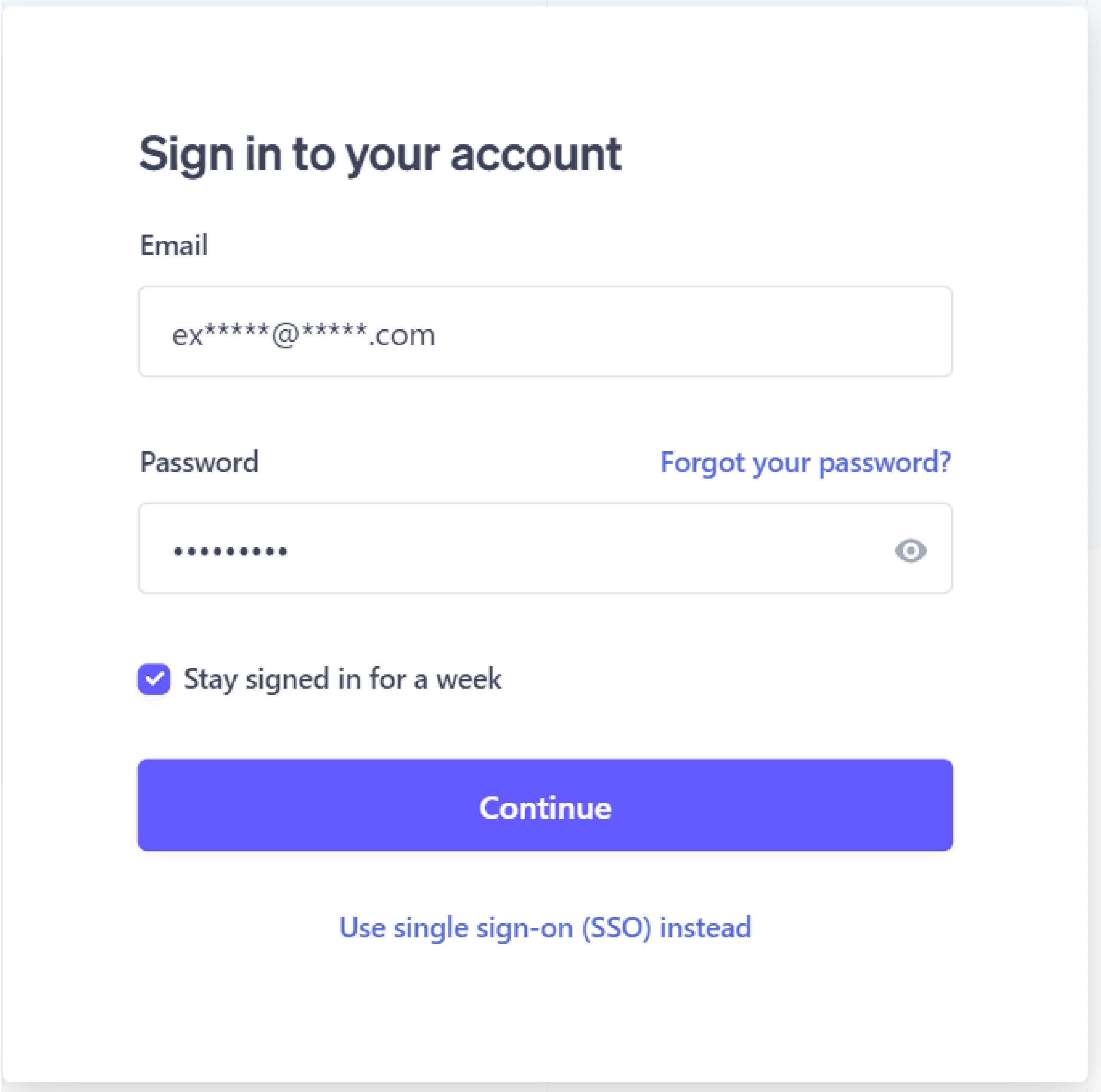


- Set the Icon (if you have one)
- Set the Logo (if you have one)
- Changes the colors to match your organization's colors

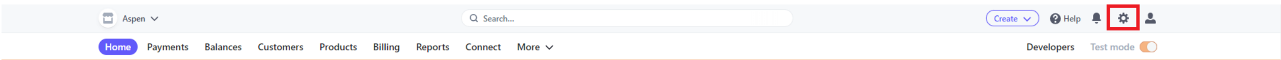
5. After you finish making your changes click the save button at the top right of the screen
6. The Automated Email will now resemble the changes you have made

How To Edit Checkout Page

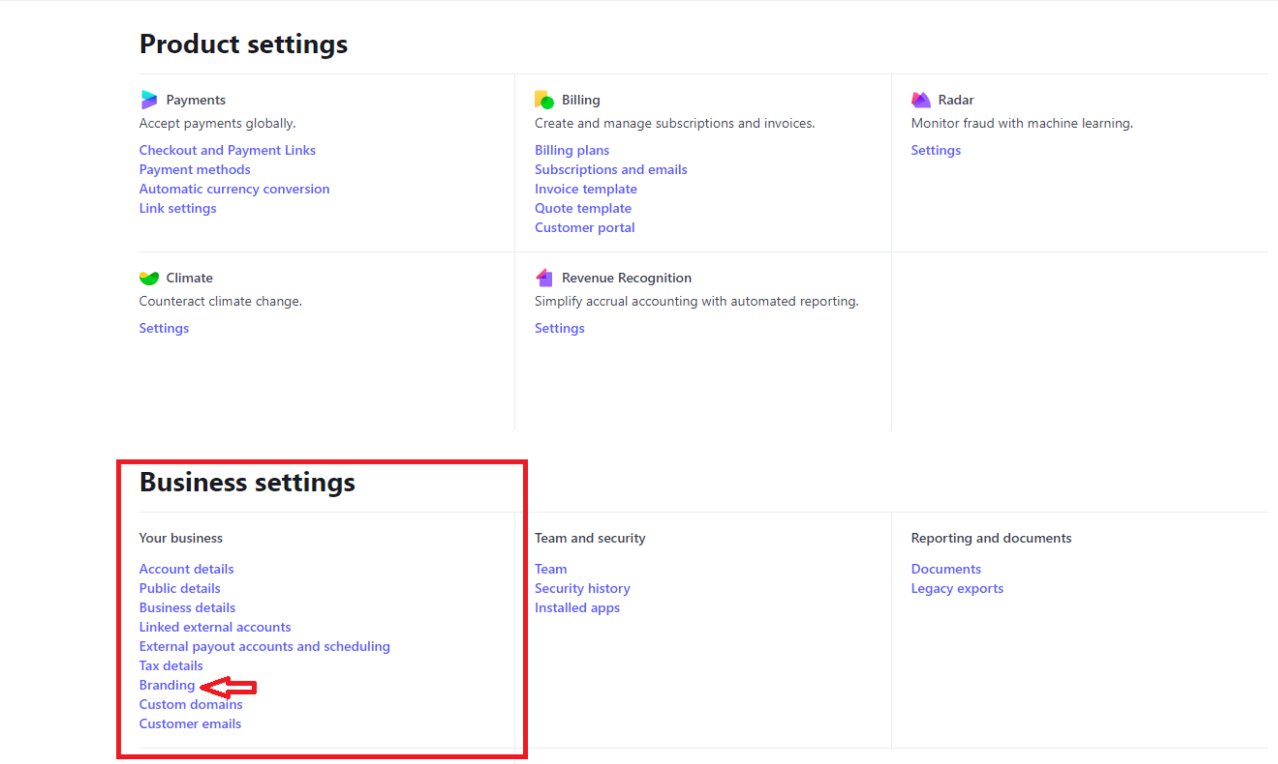
1. Login into the organization stripe account



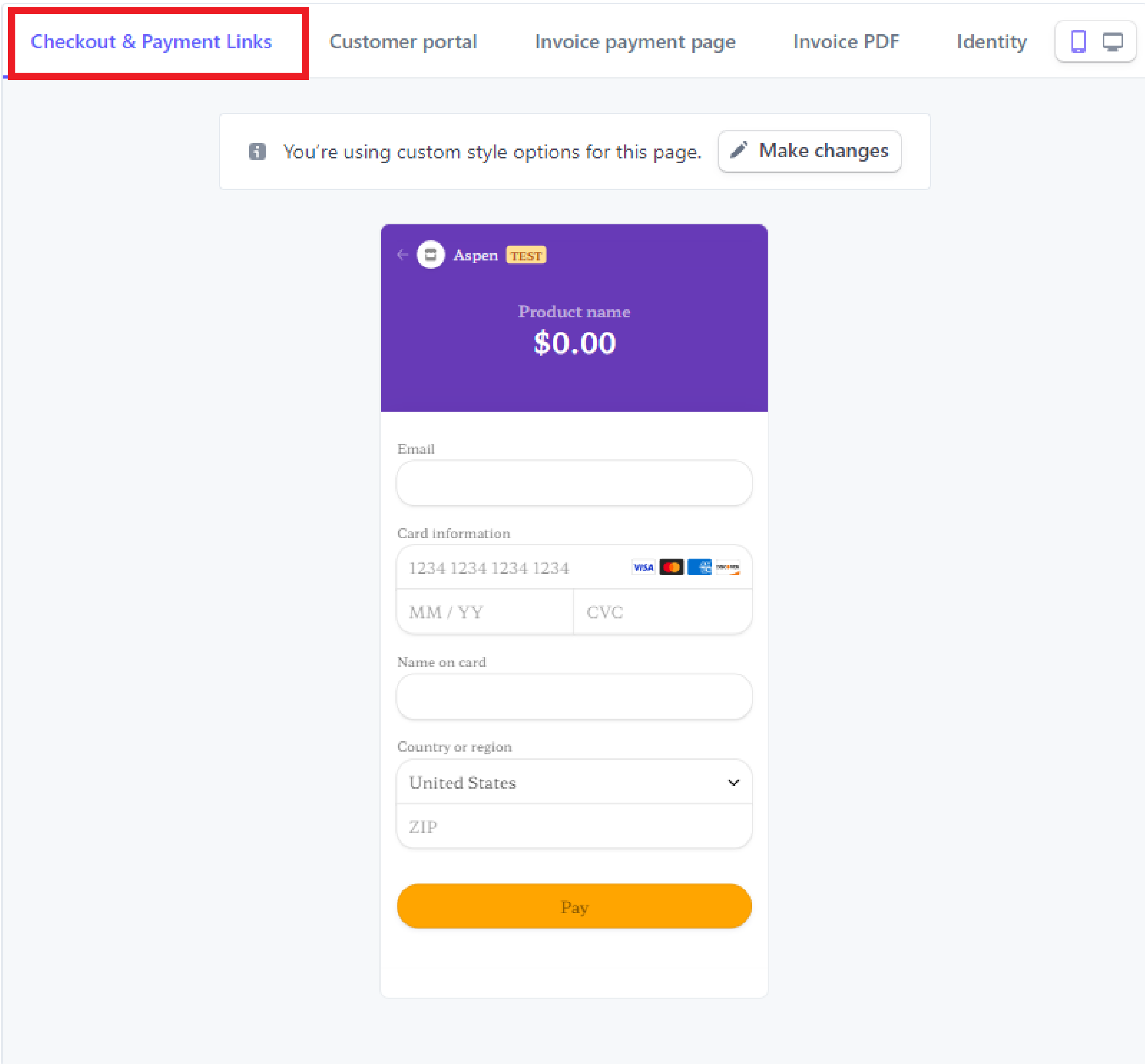
2. Go to settings



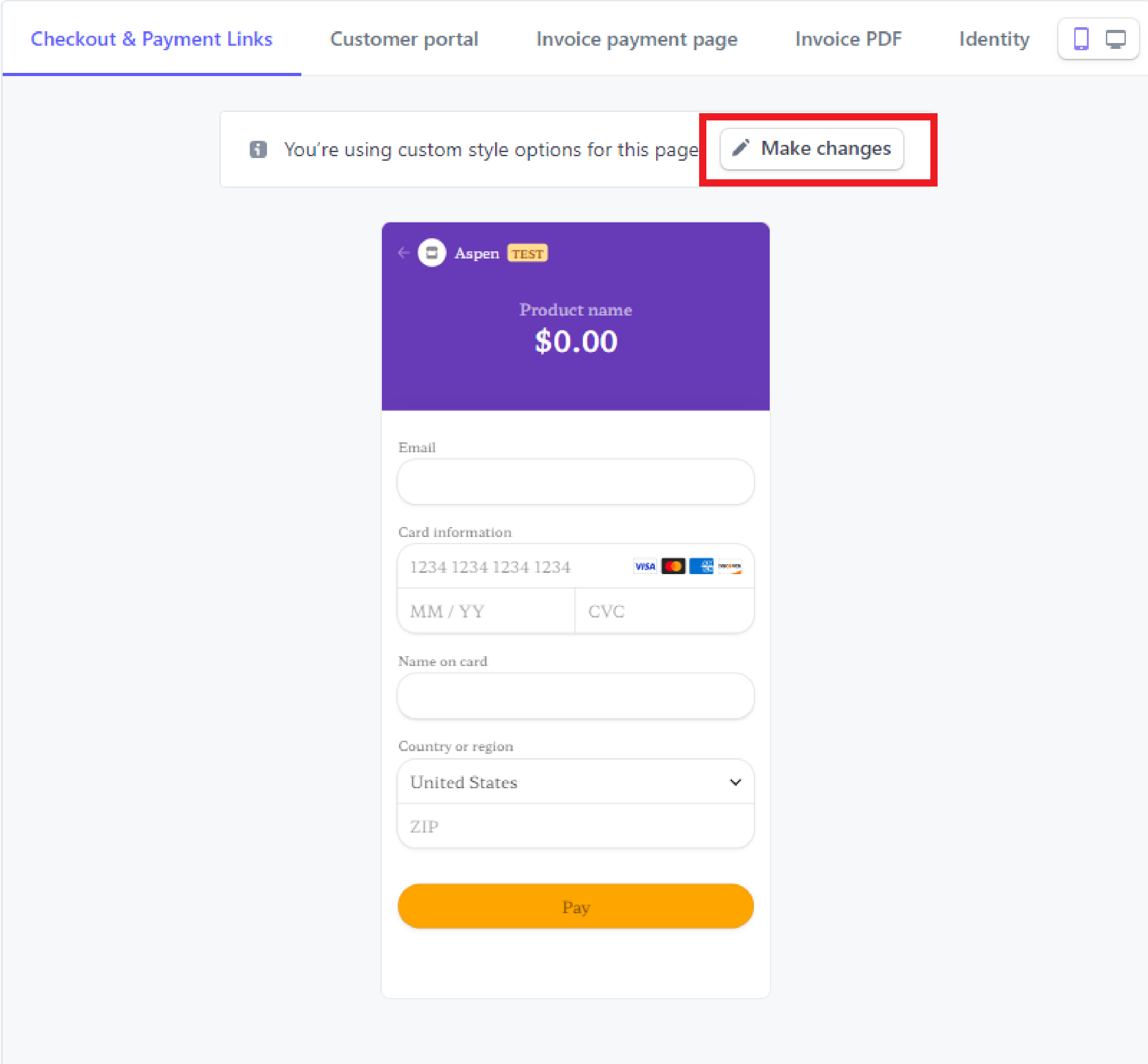
3. Go to the Branding link in "Bussiness Settings" in the "Your Business" box



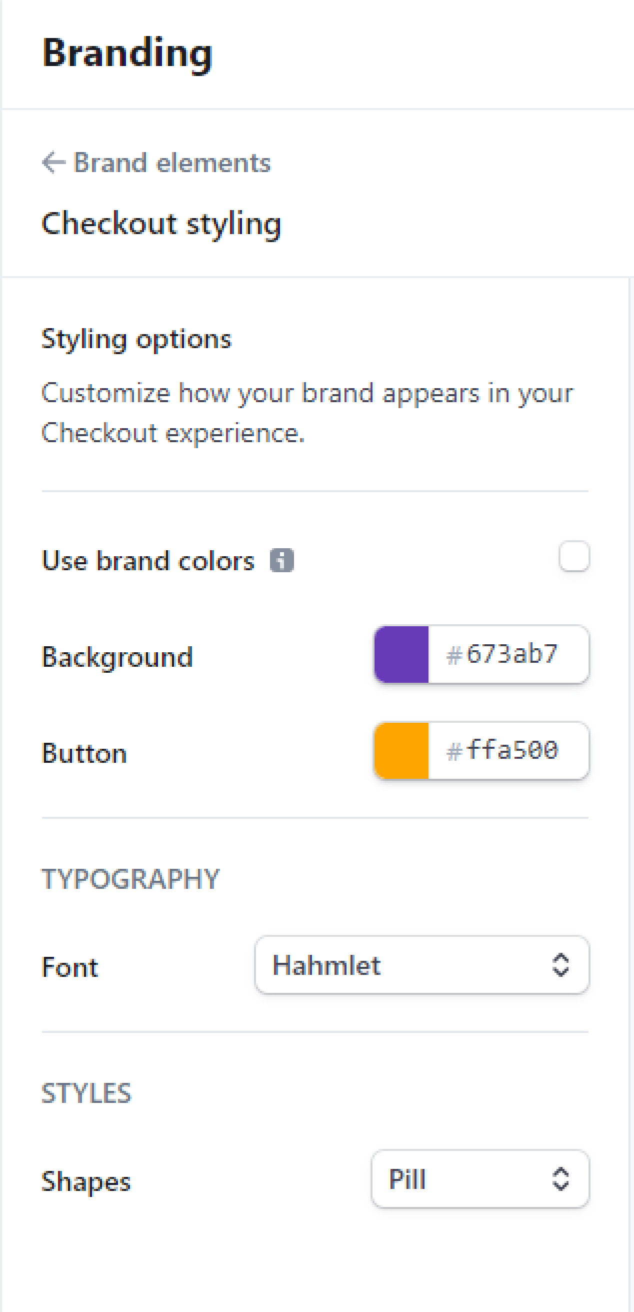
4. Make sure you are on the Checkout & Payment Links tab



5. Click on the Make Changes button



6. Change the following information:

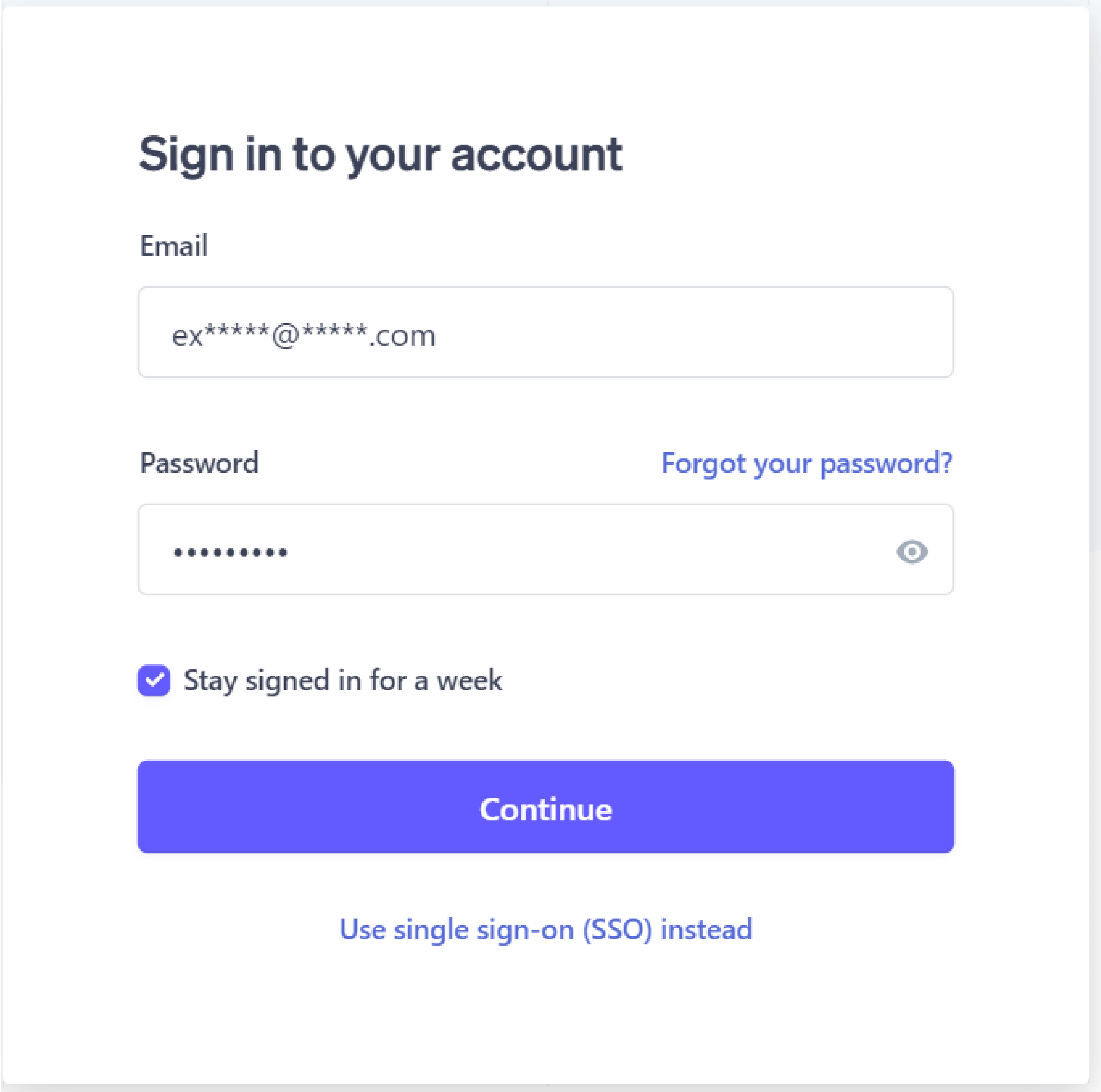


- Change the colors to match your organization's colors
- Change the font
- Change the button style

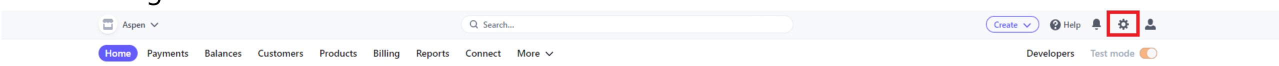
7. After you finish making your changes click the save button at the top right of the screen

How To Ensure That Auto Email Recipets Is Enabled

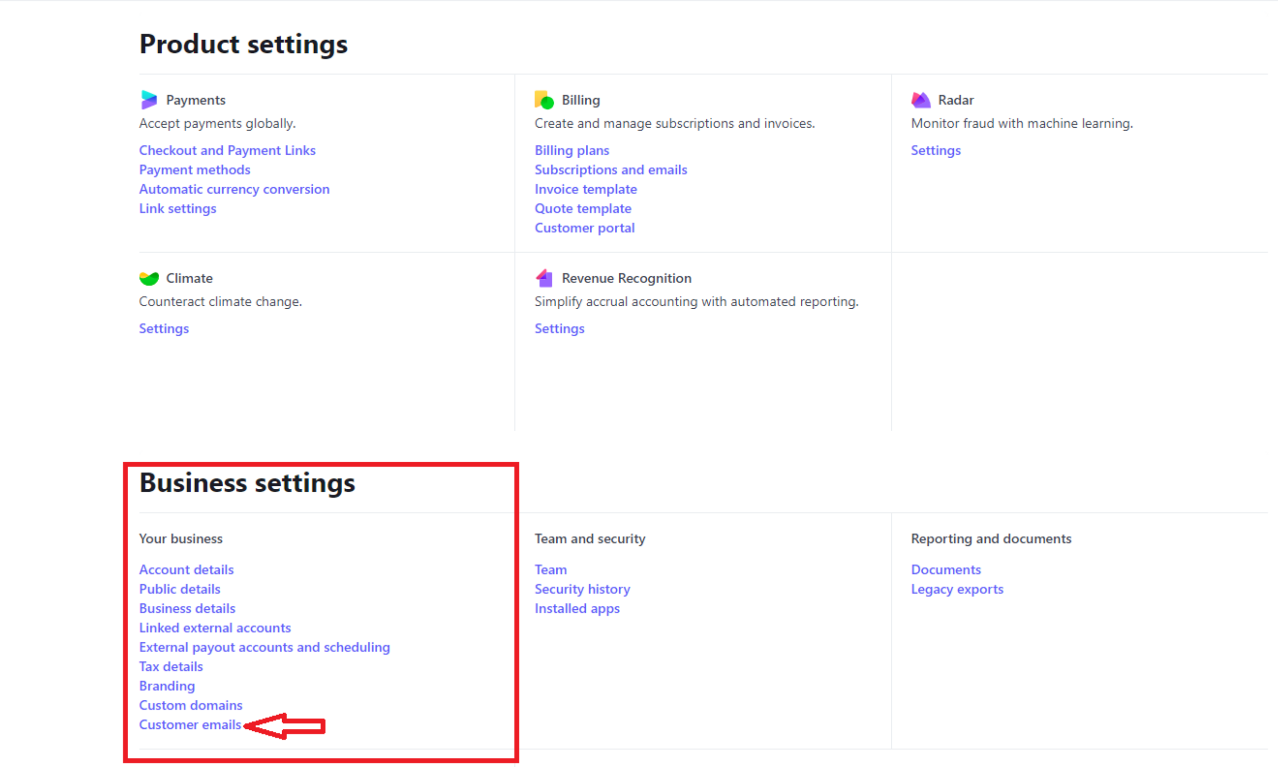
1. Login into the organization stripe account



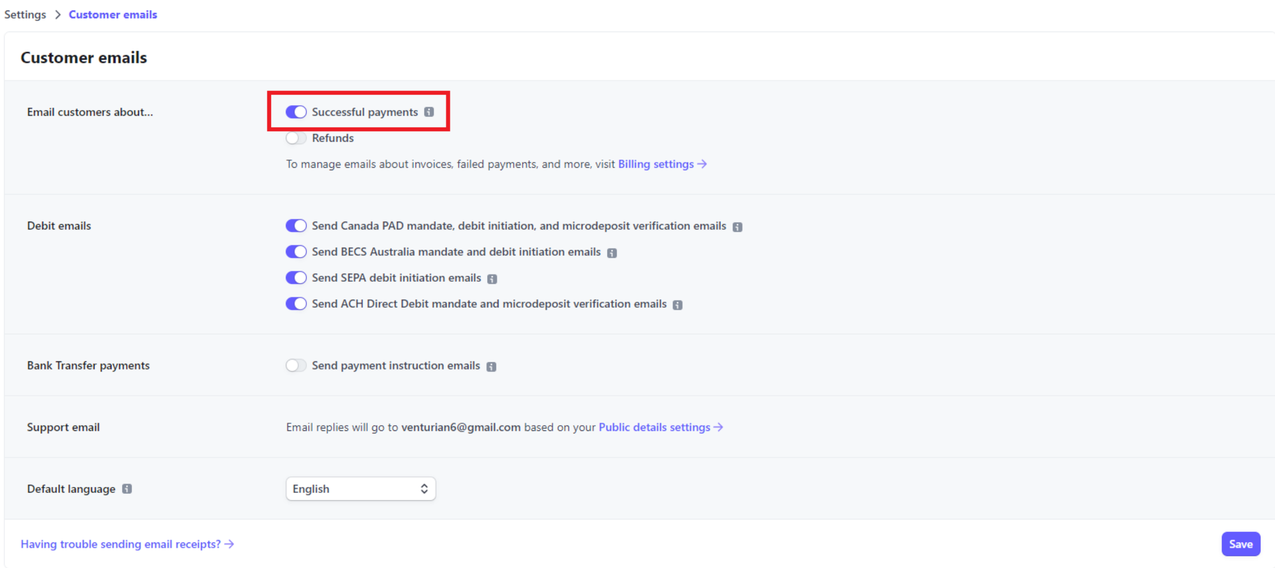
2. Go to settings



3. Go to the Customer Emails link in “Bussiness Settings” in the “Your Business” box



4. Ensure that the successful payments option is turned on.



- 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