

Quickstart: Businesses

- Projects

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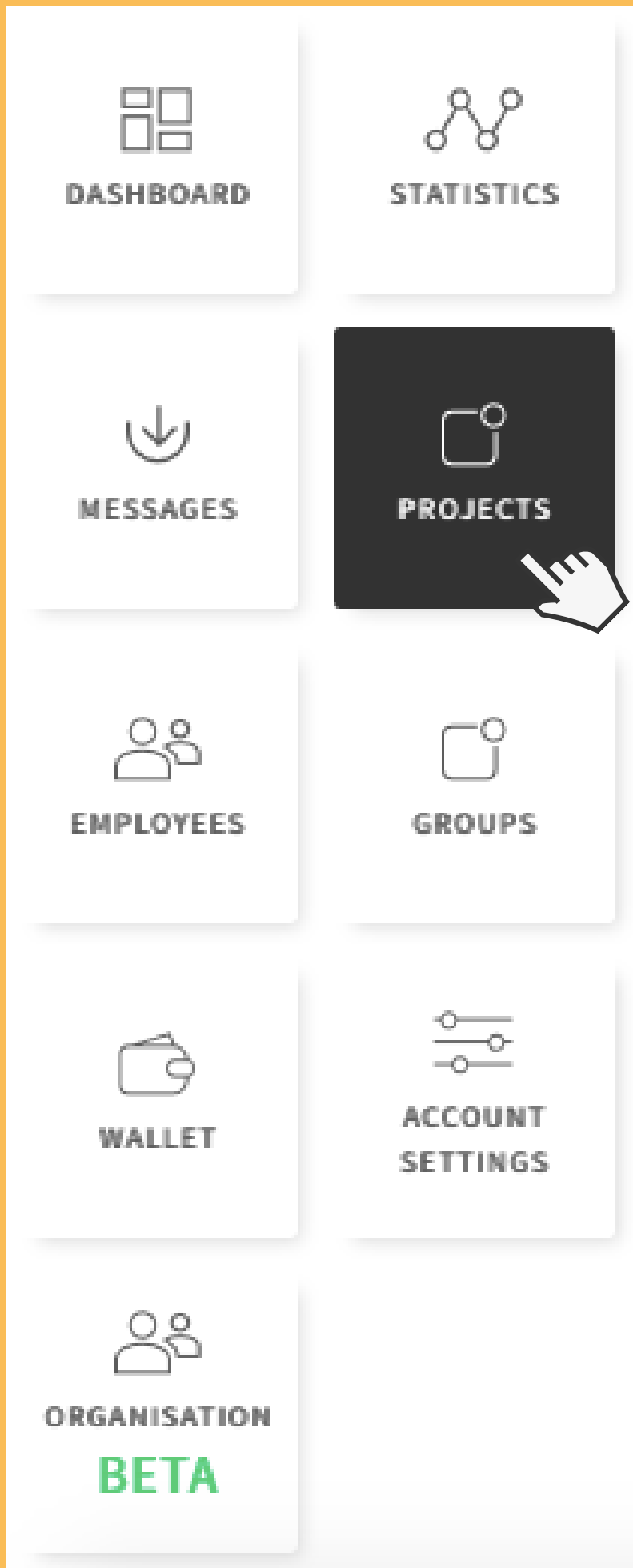


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Firstly, ensure you are in your business profile. Do this by selecting switch profile and clicking on your business profile.

The screenshot shows the IIC Business dashboard. At the top left, there is a navigation bar with the IIC logo and the text 'INVESTORS IN COMMUNITY'. Below this, there are links for 'Home', 'Explore', and 'About Us'. On the left side, there is a user profile section for 'IIC Business' with a profile picture icon. The main content area is divided into two sections: 'Sign Offs' and 'Employee Requests'. The 'Sign Offs' section has tabs for 'FUNDS', 'GIFTS', 'SKILLED VOLUNTEERING', and 'VOLUNTEERING'. Below these tabs is a table with columns for 'USER', 'DONATION', 'PROJECT', and 'SIGNED OFF BY'. A pagination control shows '1' in a circle. The 'Employee Requests' section has buttons for 'REJECT' and 'ACCEPT'. A dropdown menu is open from the top right, showing options: 'Switch Profile', 'jfkldjlkds's Profile', 'IIC Business's Profile', and 'Personal Profile'. A hand icon points to the 'IIC Business's Profile' option.

Click projects from the side menu.



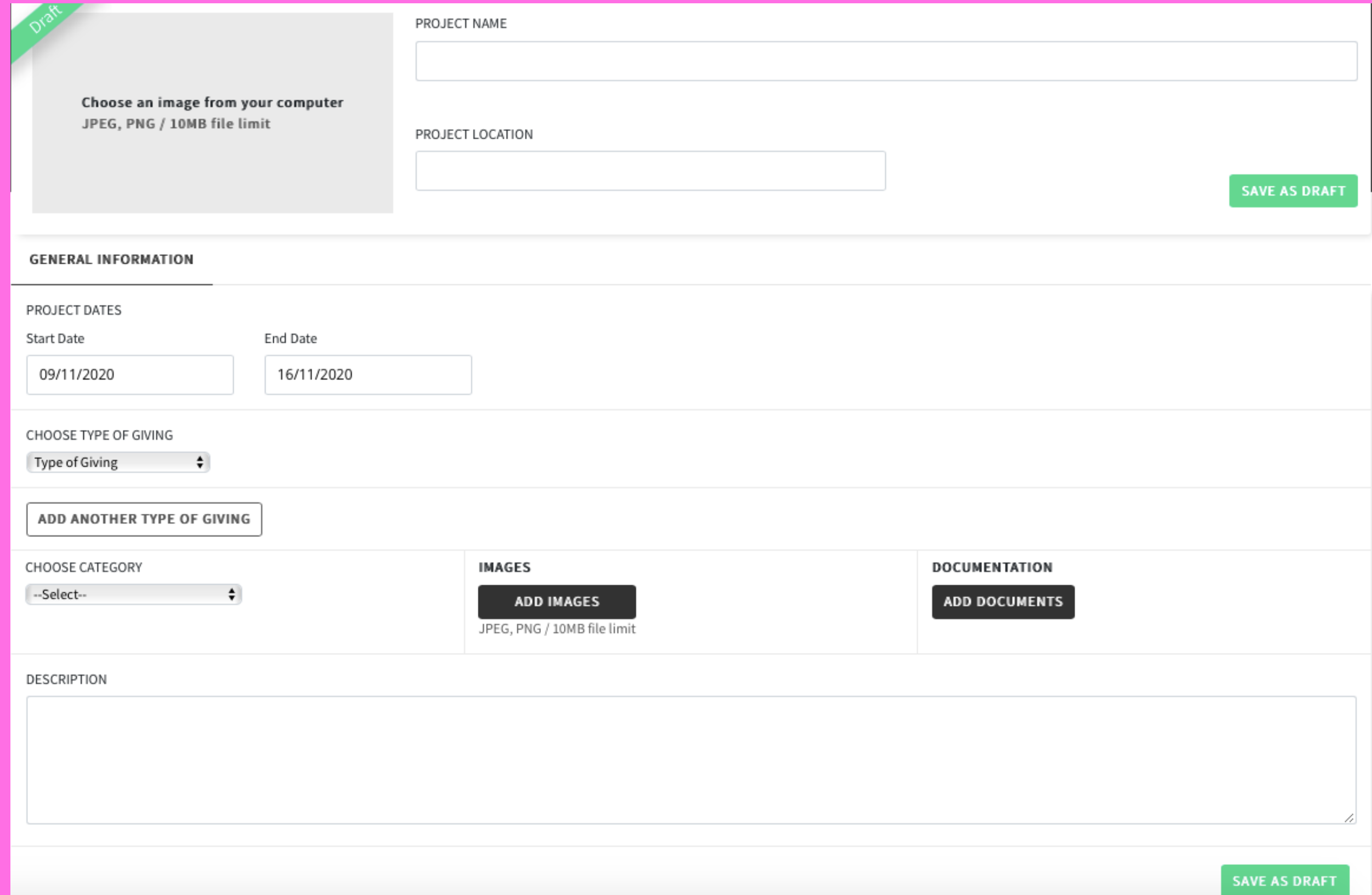
After clicking on projects you should see the screen below. Now click create project.

The screenshot displays the IIC Business dashboard. The top navigation bar includes the logo, 'INVESTORS IN COMMUNITY', and links for 'Home', 'Explore', and 'About Us'. A 'Switch Profile' button is located in the top right corner. The main content area is divided into a sidebar on the left and a main panel on the right. The sidebar contains icons for 'DASHBOARD', 'STATISTICS', 'MESSAGES', 'PROJECTS' (which is highlighted), 'EMPLOYEES', and 'GROUPS'. The main panel shows a filter menu with options: 'ALL', 'ACTIVE', 'COMPLETED', 'FINISHED', and 'DRAFTS'. Below the filter menu is a search bar labeled 'SEARCH PROJECTS' and a green 'CREATE PROJECT' button. A table header is visible with columns: 'PROJECT NAME', 'TYPE OF GIVING', 'DATES', 'STATUS', and 'STAGE'. A pagination control shows '1' in a circle, indicating the first page of results.

You will now fill out the details of your project, we have attached a few tips at the end of this document to help you make the best project possible!

Once you have filled out all the details please save as draft, we encourage you to check all the details over to be sure everything is correct as once you have published your project you will not be able to change it!

Also, be sure to save as draft a few times whilst making your project as the session will timeout after some time of inactivity.



The screenshot shows a web form for creating a project. At the top left, there is a green banner with the word "Draft" in white. Below this banner is a grey box with the text "Choose an image from your computer" and "JPEG, PNG / 10MB file limit". To the right of this box are two text input fields: "PROJECT NAME" and "PROJECT LOCATION". A green "SAVE AS DRAFT" button is located at the bottom right of this section. Below this is a section titled "GENERAL INFORMATION". Under "PROJECT DATES", there are two date input fields: "Start Date" (09/11/2020) and "End Date" (16/11/2020). Below this is a "CHOOSE TYPE OF GIVING" section with a dropdown menu showing "Type of Giving" and a button "ADD ANOTHER TYPE OF GIVING". Below that is a "CHOOSE CATEGORY" section with a dropdown menu showing "--Select--". To the right of this are two columns: "IMAGES" with an "ADD IMAGES" button and "JPEG, PNG / 10MB file limit" text, and "DOCUMENTATION" with an "ADD DOCUMENTS" button. At the bottom is a "DESCRIPTION" section with a large text area. A second green "SAVE AS DRAFT" button is located at the bottom right of the form.

Tip: once you have saved as draft you can exit the project and come back to it later if you wish, it will be waiting for you in the project section of your business profile.

You will now see an associate charity tab, please fill in what charity you would like to associate and then select it from the dropdown menu. Once you've done this please click associate charity and then publish.

ADD ANOTHER TYPE OF GIVING


CHOOSE CATEGORY <input type="text"/>	IMAGES ADD IMAGES JPEG, PNG / 10MB file limit	DOCUMENTATION ADD DOCUMENTS
--	---	--

DESCRIPTION

Business project!

Exceeded Funds would be spent on something relevant to the project description

SELECT CHARITY TO ASSOCIATE

SAVE AS DRAFT **ASSOCIATE CHARITY** 

After publishing, your live project will now be on our explore page under projects.

The screenshot shows the 'INVESTORS IN COMMUNITY' website. The navigation bar includes 'Home', 'Explore', and 'About Us'. A search bar is on the left, and a 'Switch Profile' button is on the right. A dropdown menu is open under 'Explore', with 'Projects' selected. Below the navigation, there are filters for 'Live', 'Type of giving', 'Category', and 'Location'. The main content area displays three project cards:

- Project 1:** Category: Volunteering. Title: **Save The Childfren**. Location: Northampton, UK. Deadline: **Feb 10, 2021**. Organization: Ross Charity.
- Project 2:** Category: Funds. Title: **VCCF20 TES Christmas Party**. Location: UK, UK. Deadline: **Dec 31, 2020**. Organization: CHILDRE CHARITY.
- Project 3:** Category: Skilled Volunteering. Title: **IIC How To Guide help**. Location: Sheffield, UK. Deadline: **Nov 19, 2020**. Organization: jfkldjlkds.


At the bottom of the page, there are navigation arrows and a page number '1'.

You will be able to see all your live/completed/draft projects in the projects section of your business profile.

In this section you will also see actions, the next few pages will discuss what actions means.

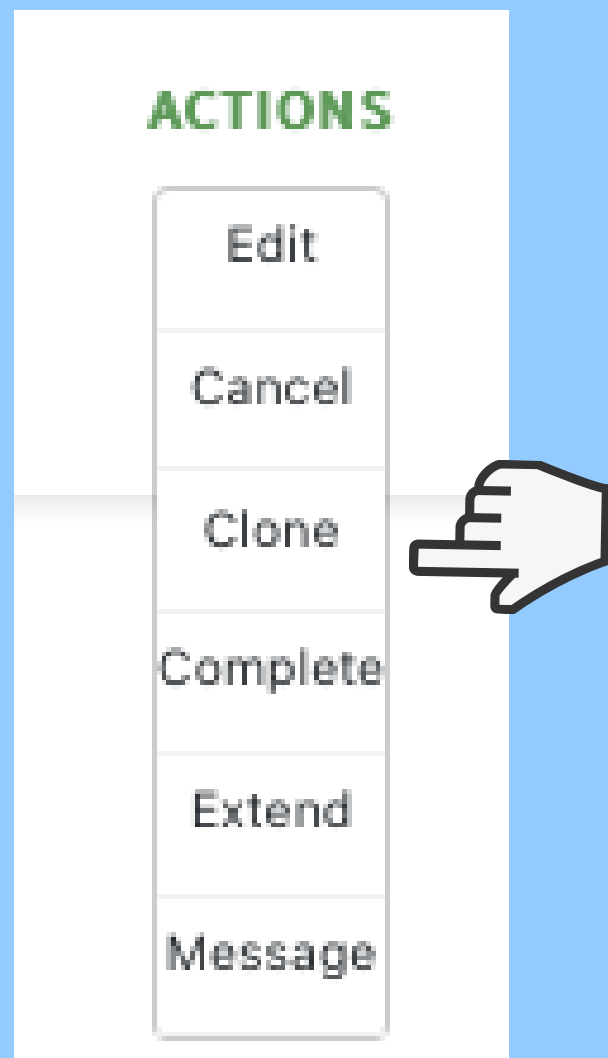
ALL ACTIVE COMPLETED FINISHED DRAFTS

SEARCH PROJECTS CREATE PROJECT

PROJECT NAME	TYPE OF GIVING	DATES	STATUS	STAGE	ACTIONS
Business project	Funds	START: Mon Nov 09 2020 END: Fri Nov 20 2020	Draft	New	 ACTIONS

< 1 >

Clone - if you see your project is doing well and you wish to clone it. You should click clone on the actions dropdown menu. This will take you to the create a project page but this time it will be pre-filled, please select what you would like to alter from your previous project such as the date, image, amount, type of giving etc and then click publish. Once again this project will appear in the explore section. You should also associate your charity once again.



Draft

PROJECT NAME **PREVIEW**

Business project

PROJECT LOCATION

Sheffield

SAVE AS DRAFT **ASSOCIATE CHARITY**

GENERAL INFORMATION **ADMINS**

PROJECT DATES

Start Date: 09/11/2020 End Date: 20/11/2020

CHOOSE TYPE OF GIVING

Funds

Minimum Goal £: £1 Maximum Goal £: £100 Required Date: 20/11/2020

Can exceed my goal

DELETE

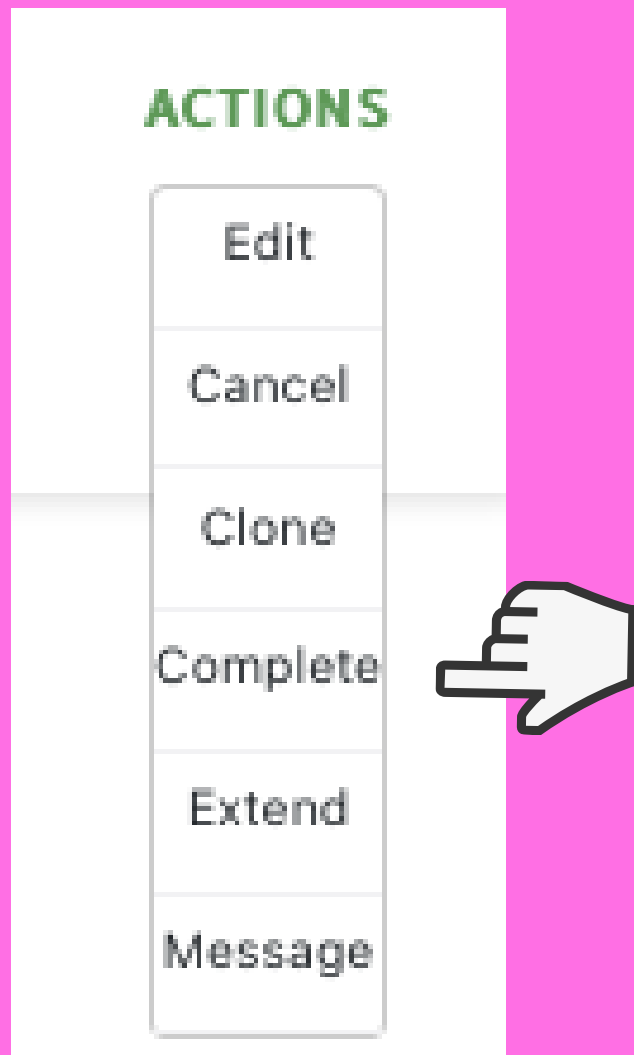
ADD ADDITIONAL ITEMS

CHOOSE TYPE OF GIVING

Type of Giving **DELETE**

ADD ANOTHER TYPE OF GIVING

Complete - when you have received all your funds/gifts/volunteers and you are happy to complete the project, please click complete on the actions dropdown menu. Then add your comments on how the project performed and click complete.



Project Summary

Project Name
IIC How To Guide help

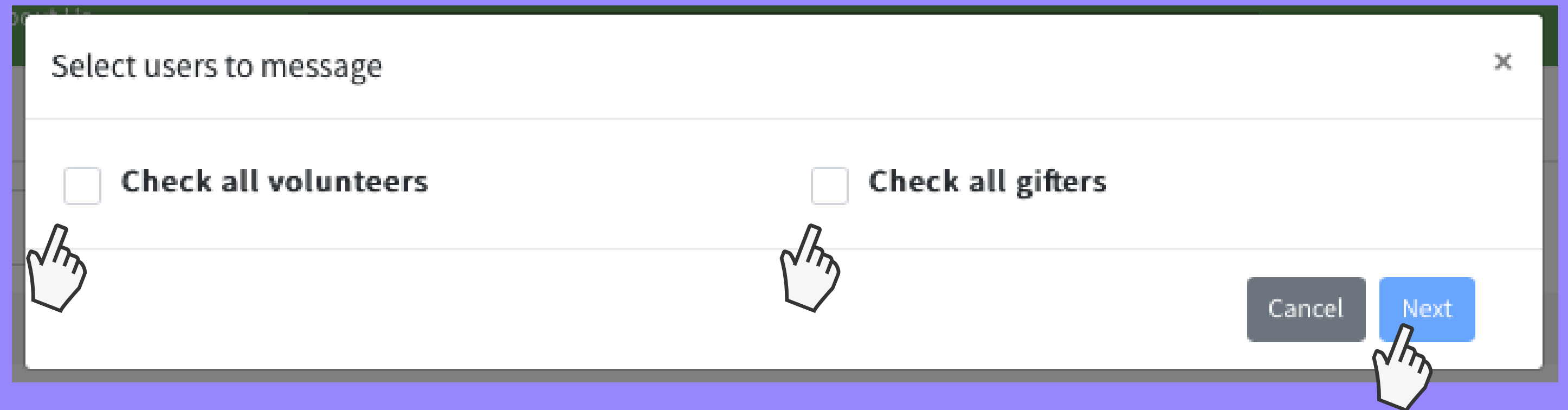
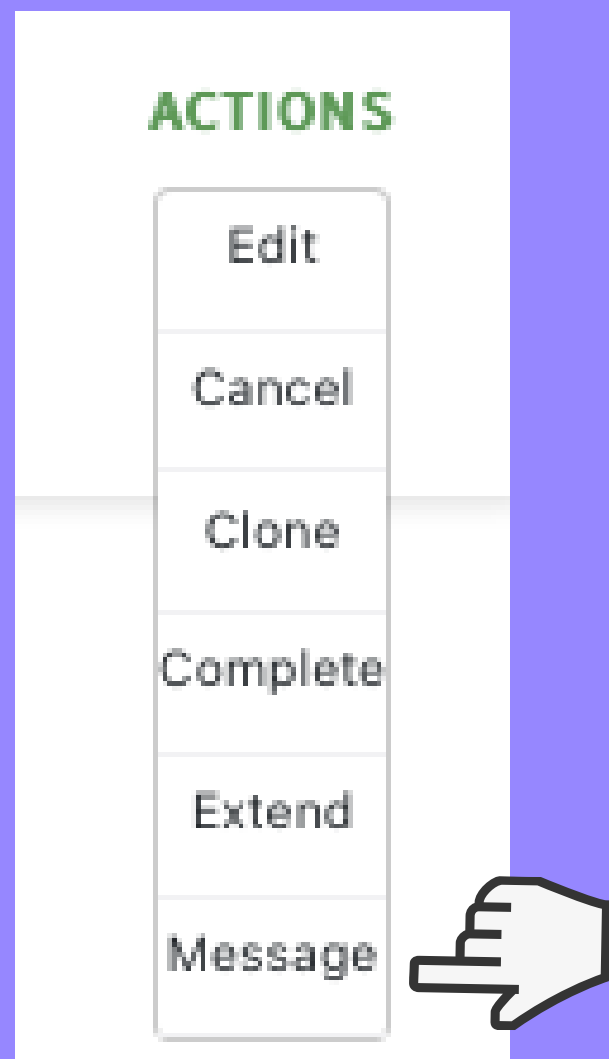
Start Date	Date Completed
Nov 6, 2020	Nov 6, 2020

Skilled Volunteering Confirmation

NAME	SKILLS	DATES	TIME OFFERED	ACTUAL TIME
< 1 >				
People Volunteered: 0			Hours Volunteered: 0 h	
Add Comments				
<input type="text"/>				

CANCEL **COMPLETE**


Message - If you would like to send a message to your project gifters/volunteers (messaging to funders is not available) then click message from the actions dropdown menu, choose who you would like to message for this specific project and click next. You can only message on live/active projects – if a project is finished, you will no longer be able to message. Once a message is sent, you can check responses in the message button.



Extend - to extend your project, please click extend from the actions dropdown menu, then add the date you would like to extend to and click extend.

ACTIONS

- Edit
- Cancel
- Clone
- Complete
- Extend
- Message





Extend Project End Date

Project End Date

19/11/2020

Close Extend



Thanks for reading!

Please get in touch if you have more questions.

Contact: ross.shipman@investorsincommunity.org

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Quickstart: Businesses - Creating Groups.

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Firstly, ensure you are in your business profile. Do this by selecting switch profile and clicking on your business profile.

Then click on the groups in the side bar.

INVESTORS IN COMMUNITY Home Explore About Us

IIC Business

Switch Profile

All volunteering offers: OFF

- jfkldjlkds's Profile
- IIC Business's Profile**
- Personal Profile

Sign Offs

FUNDS GIFTS SKILLED VOLUNTEERING VOLUNTEERING

USER	DONATION	PROJECT	SIGNED OFF BY
1			

Employee Requests


REJECT ACCEPT

NAME	EMAIL	INFO	ALL
------	-------	------	-----

DASHBOARD STATISTICS MESSAGES PROJECTS EMPLOYEES **GROUPS**

Click create group and then choose which account you want the group to be part of (personal account or a business account) after doing this, click next.

SEARCH GROUPS

 [CREATE GROUP](#) [JOIN PRIVATE GROUP](#)

GROUP NAME	COMMUNITY CREDITS	DONATED	TIME VOLUNTEERED	SKILLED VOLUNTEERING	ITEMS GIFTED	MEMBERS	MEMBER TYPE	GROUP TYPE	ACTIONS
------------	-------------------	---------	------------------	----------------------	--------------	---------	-------------	------------	---------

< 1 >


Choose Account ✕

Choose which profile you want to interact with the group:

Personal Profile

Business profile

--Select--

 [Next](#)


Choose if you want to have individuals or businesses invited to the group then click next.

Choose Account ✕

Who can be a member of your group?

Individuals

Business

 NEXT

Input the group name and description, and select whether its hidden or public then click next.


Add group details ✕


Group Name

Group Description

Visible
Anyone can find this group via the explore groups page.
Anyone can join this group.

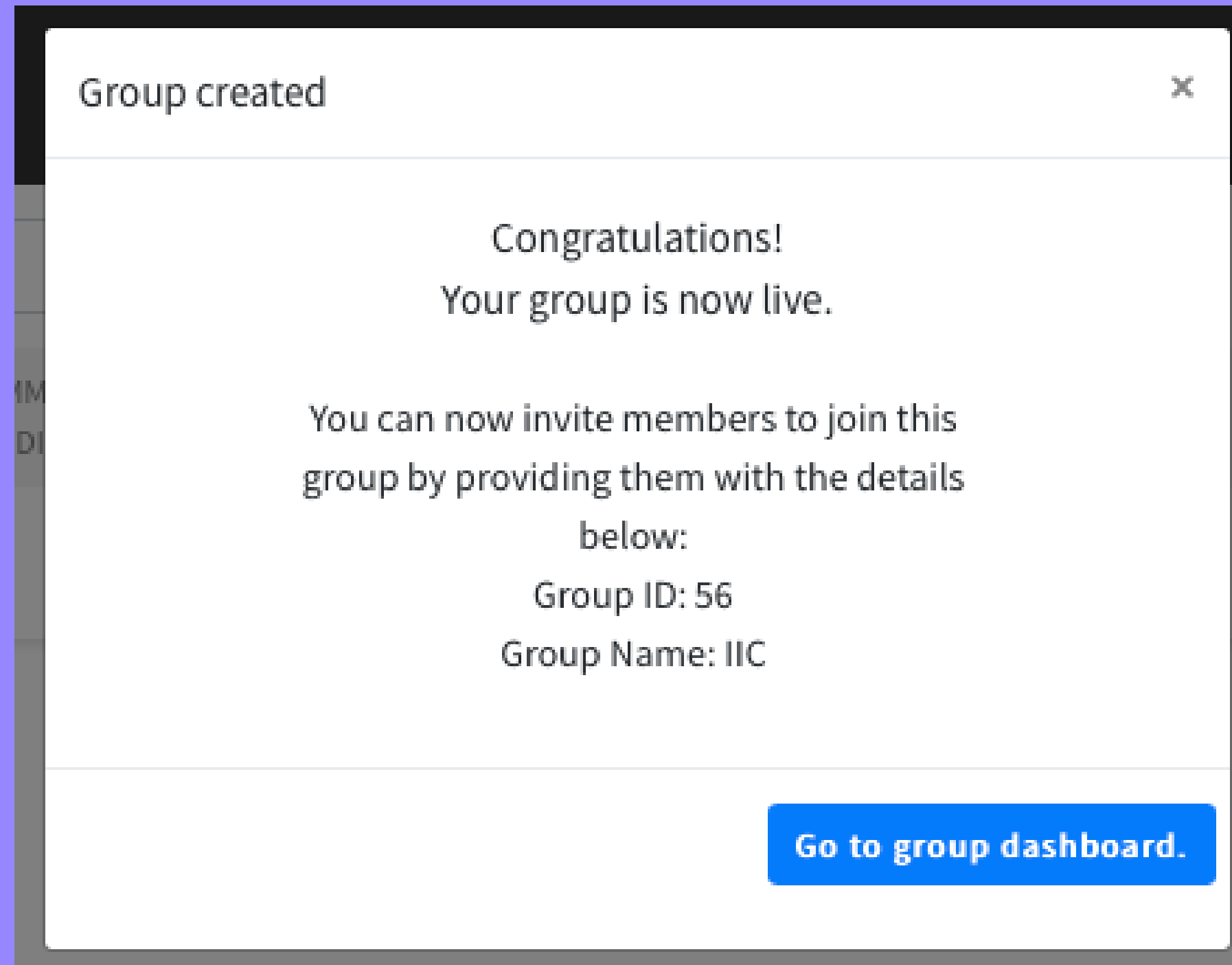
Hidden
This group will not be visible on the explore groups page.
Members can join this group with the Group ID number and
Group Access Code.

 [Learn more about group privacy](#)



Read the difference between the types of groups by clicking on 'learn more about group privacy'

After clicking next your group will be created.



A white notification dialog box with a black border and a close button (X) in the top right corner. The title bar reads "Group created". The main text is centered and reads: "Congratulations! Your group is now live. You can now invite members to join this group by providing them with the details below: Group ID: 56 Group Name: IIC". At the bottom right, there is a blue button with white text that says "Go to group dashboard."

Group created ✕

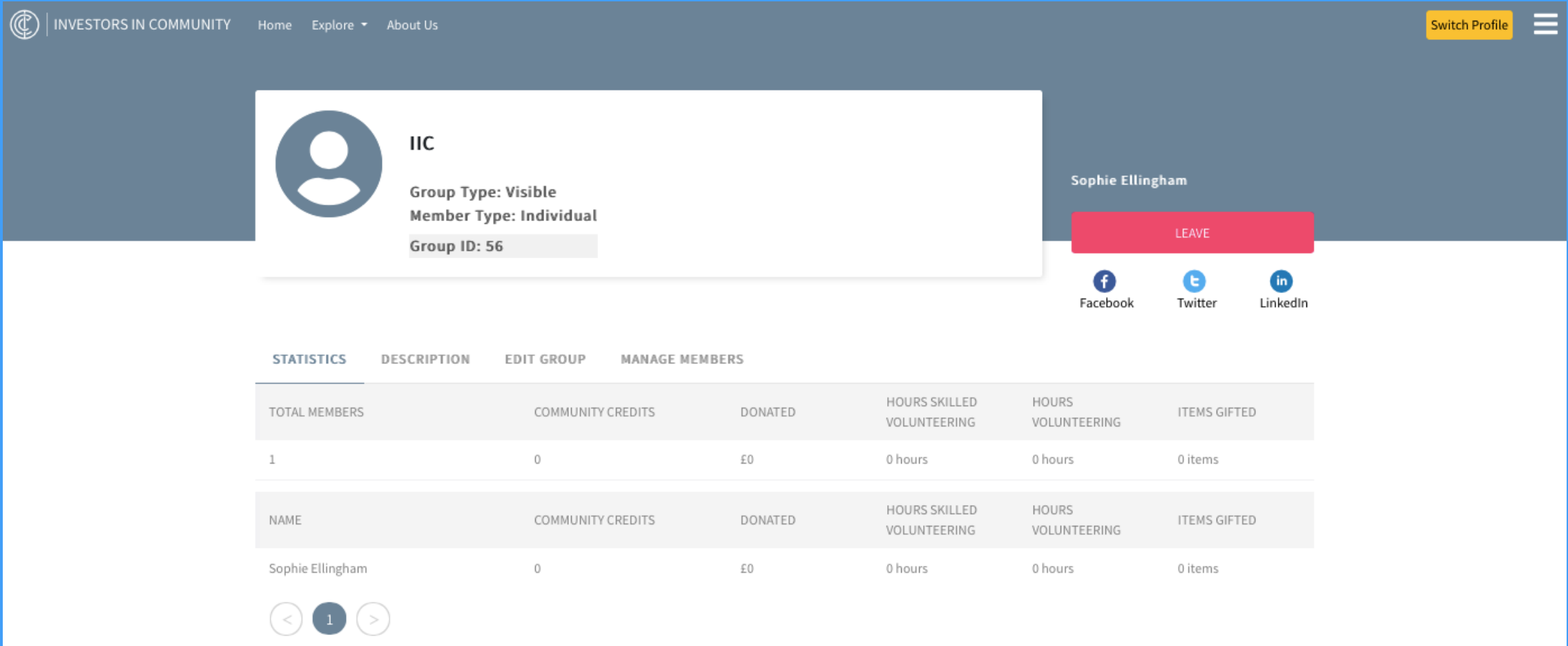
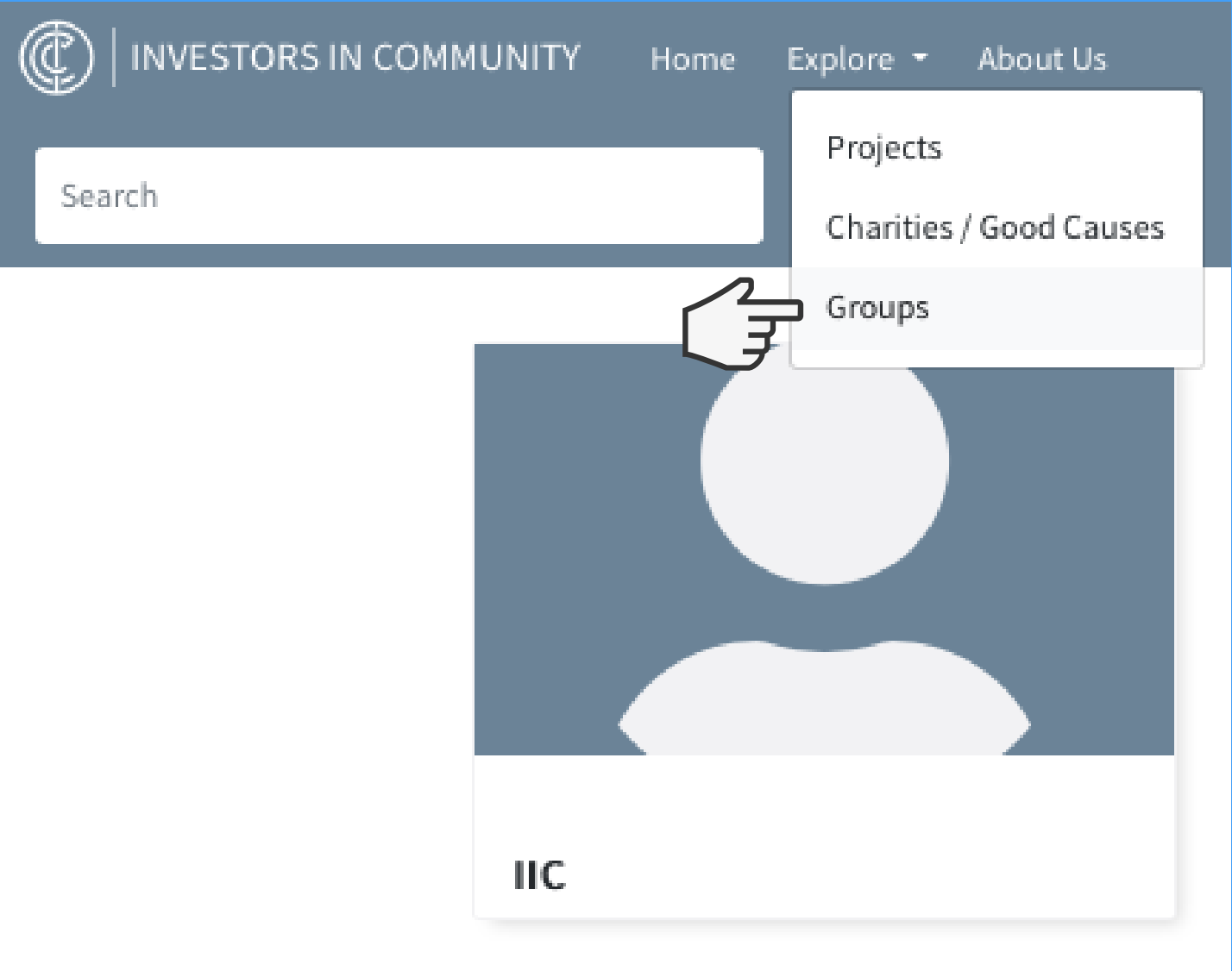
Congratulations!
Your group is now live.

You can now invite members to join this group by providing them with the details below:

Group ID: 56
Group Name: IIC

[Go to group dashboard.](#)

If you chose public, the group will now display in the group section of the 'Explore' tab at the top of your screen. Both groups can be managed from within the 'Groups' tab of the profile it is associated with.



Thanks for reading!

Please get in touch if you have more questions.

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