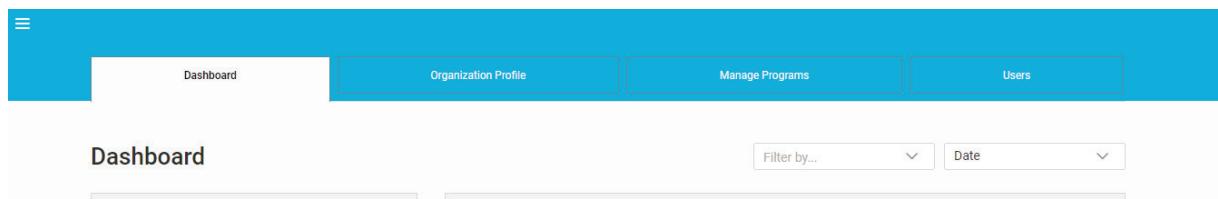


GiveSmartOKC

Know More. Give More.

Still trying to navigate the new GiveSmartOKC? We've compiled a few tips to help! Lets get started:

Users can manage three tabs: Organization Profile, Manage Programs and Users.

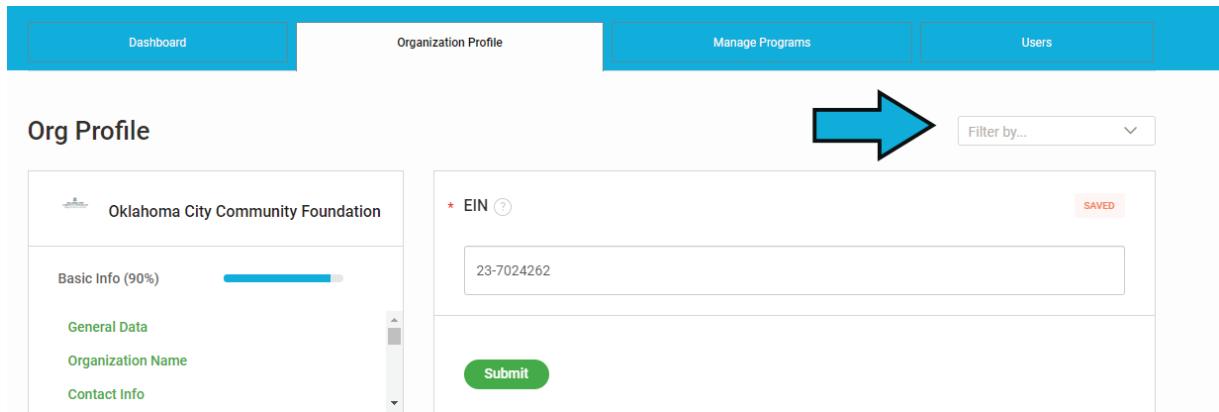


Organization Profile

The Organization Profile tab has five sections: Basic Info, Governance, Management, Financials and Receive Donations. Once you complete each tab, you must manually click each section to proceed to the next one.

A screenshot of the 'Organization Profile' section. On the left, there is a sidebar with a list of sections: 'Basic Info (90%)', 'General Data', 'Organization Name', 'Contact Info', 'Governance (100%)', 'Management (70%)', 'Financials (90%)', and 'Receive Donations (50%)'. A blue arrow points from the bottom of the 'Basic Info' section towards the right. On the right, there are two forms. The top form is for 'EIN' and contains a field with the value '23-7024262' and a 'Submit' button. The bottom form is for 'Organization Name' and contains fields for 'Organization Name' (value 'Oklahoma City Community Foundation') and 'Legal Name' (empty), with a 'Submit' button and an 'Email Profile Coach' button.

Notice the dropdown menu on the right side of the page. The best option is to filter by 'All Fields.'



The screenshot shows the 'Org Profile' section of a software application. At the top, there are four navigation tabs: 'Dashboard', 'Organization Profile' (which is selected), 'Manage Programs', and 'Users'. Below the tabs, the page title is 'Org Profile' with a sub-section for 'Oklahoma City Community Foundation'. On the left, a sidebar lists 'Basic Info (90%)', 'General Data', 'Organization Name', and 'Contact Info'. On the right, there is a form for entering an EIN, with the field containing '23-7024262' and a 'Submit' button. A blue arrow points to a dropdown menu labeled 'Filter by...' located in the top right corner of the page.

Be sure to save each subsection before leaving the page. **If you do not click save before leaving the page, the data will be lost.**

Section Tips

Basic Info:

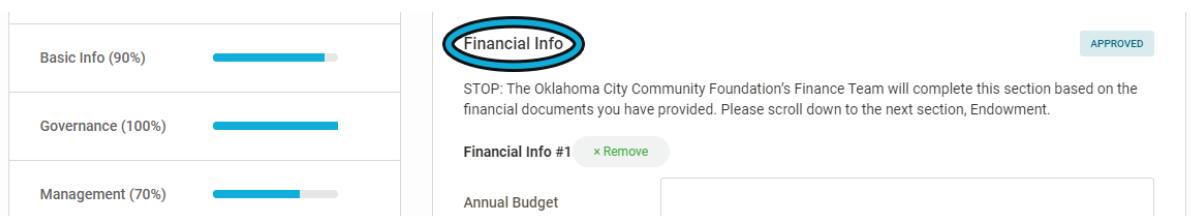
Physical Address: Please do not include a suite number, building or PO Box. You can put the full address or PO Box in the subfield titled 'Main Address.'

Service Area: Cities are being added to this field. We will let you know when this has been completed.

Financials

990/Audits/Financial Documents: You may notice that some files are uploaded more than once. Please know that it will only appear on the front end one time. Deleting a document that is not at the bottom of the list alters the order of the files below, causing the year that the file is labeled to be incorrect.

Financial Info: Please do not modify this area of the profile. The Oklahoma City Community Foundation's accounting department will complete this section based on the financial documents provided.



The screenshot shows the 'Financial Info' section of the profile. On the left, there are progress bars for 'Basic Info (90%)', 'Governance (100%)', and 'Management (70%)'. In the center, a button labeled 'Financial Info' is highlighted with a blue oval. A note below it states: 'STOP: The Oklahoma City Community Foundation's Finance Team will complete this section based on the financial documents you have provided. Please scroll down to the next section, Endowment.' At the bottom, there is a section for 'Annual Budget' with a 'Remove' button.

Receive Donations:

Oklahoma State Charitable Solicitations Permit: Update your state registration expiration date for your annual certification to show that you are an organization that solicits and/or accepts charitable contributions. For more information regarding this registration, please visit sos.ok.gov/charity/Default.aspx It's important to upload this certificate each year.

Manage Programs

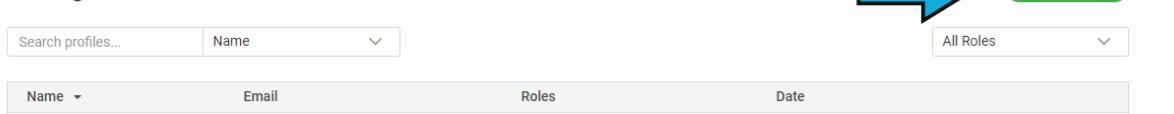
Your programs will be listed on the sidebar. You can add a new program by selecting the 'Add New Program' option.

You now have the option to include a photo for each program.

Users

Invite someone else within your organization to help complete your profile by selecting the 'Invite New User' option in the right corner. You will select either the manager or editor role. A manager can submit changes while an editor can only modify and save fields.

Manage Users



Search profiles... All Roles

Name Email Roles Date

Invite New User