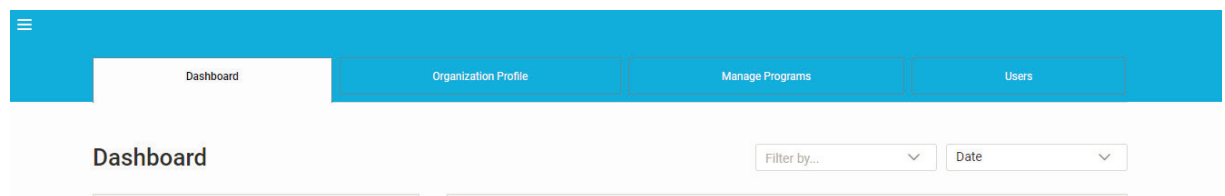# GiveSmartOKC

Know More. Give More.

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

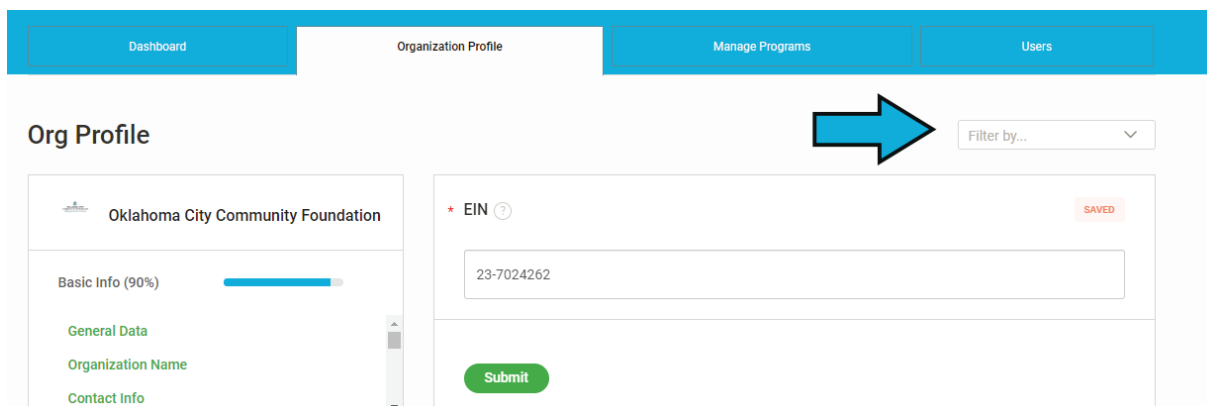Users can manage three tabs: Organization Profile, Manage Programs and Users.

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.

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

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.**
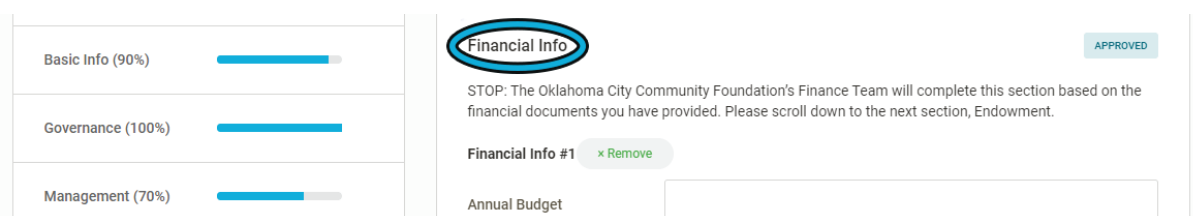
Section Tips

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.

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.
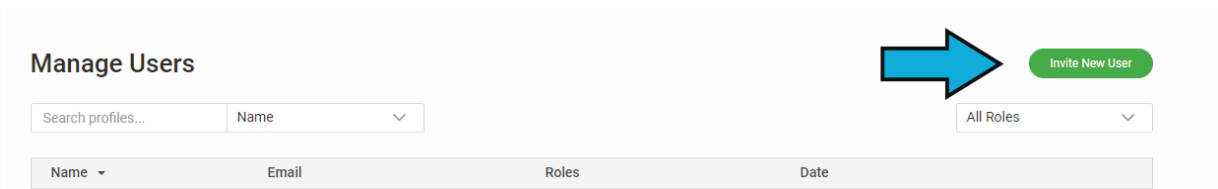
Manage Programs

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.