# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>STEP</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>STEP 1</td>
<td>Login</td>
<td>3</td>
</tr>
<tr>
<td>STEP 2</td>
<td>Customize Your Settings</td>
<td>4</td>
</tr>
<tr>
<td>STEP 3</td>
<td>Add a Payment Method</td>
<td>6</td>
</tr>
<tr>
<td>STEP 4</td>
<td>Choose a Subscription</td>
<td>8</td>
</tr>
<tr>
<td>STEP 5</td>
<td>Invite Team Members</td>
<td>10</td>
</tr>
<tr>
<td>STEP 6</td>
<td>What to Do Next</td>
<td>12</td>
</tr>
<tr>
<td>STEP 7</td>
<td>Support &amp; Resources</td>
<td>13</td>
</tr>
</tbody>
</table>
STEP 1: Login

If you’re reading this, you’ve probably received an email with your login credentials to the WeDidIt platform. If this is the case, (yay!), let’s get you ready to roll. To get started, click the ‘log into’ link in the email. Use the username & password in the email to login to your account.

Now, you officially have logged into your WeDidIt account!
STEP 2: Customize your Settings

Customizing your user and organization settings is essential to getting started on the platform. You want to make the platform for YOU.

In the User Settings tab, change your password and update your email notifications.

In the Organization tab, add your organization’s logo, address, mission statement, and donation settings.

Check List

- From the main menu, click ‘user settings’
- Change your password, and notification settings if desired
- Then click, ‘Organization’
- Add your logo, address and mission statement
- Change your donation settings, if desired

Now, you officially have customized your settings!
ATTENTION:

- Your account was **automatically created** by your Fiscal Sponsor

- This means that you are **not yet** on a **subscription** plan

- **Select any subscription** plan in order to activate your features
STEP 3: Add a Payment Method

To add a payment method:

- Click ‘billing’ from the WeDidIt main menu
- Click ‘payment method’
- Follow the easy steps to adding your payment method
Check List

Click ‘billing’ on the main menu, then click ‘payment method’

Choose a payment method and enter in the correlating information

Once the payment method has been verified, you are good to go!

Now, you officially have a payment method associated with your account!
STEP 4: Choose a Subscription

Choosing a subscription will enable you to begin fundraising.

It will also give you the specific tools and features that your organization needs in their fundraising and donor research efforts.

To see what is included in each subscription level follow these steps:

Check List

- From the main menu, click ‘billing’
- Then click, ‘plans’
- Scroll up and down through the features included in each plan to find the one that’s right for your organization
- Click ‘subscribe’ beneath the plan to confirm your choice

*Note: The $0/month FREE plan requires a billing method on file to subscribe. Your card/bank account will not be charged for the FREE plan.
Check List

1. Click ‘billing’ from the main menu, then, ‘plans’.
2. Scroll through your subscription options and the features that each level contain.
3. Click ‘subscribe’ to one of the plans.

Now, you officially have a WeDidIt subscription!
STEP 5: Users

Invite your team members to your project account account by clicking ‘Users’ and then ‘New’

You can set a user as an admin by clicking ‘Users’ then ‘Current’. Then ‘edit’ an individual user, and click the box ‘Administrator’, then ‘Update User’
Check List

- Click ‘Users’, then ‘New’ to add users from your team to the WeDidIt platform.
- Click ‘Users’, then ‘Edit’ next to the individual user you wish to make an administrator.
- Click the checkbox ‘Administrator’
- Click ‘update user’

Now, you officially have account users and administration!
WHAT TO DO NEXT?

Explore the platform!

Introduce and invite your colleagues to the platform

Create campaigns and share away

Keep track of donations with contribution list & statistics
SUPPORT AND RESOURCES

- Read through the Project FAQ Document
- Send pressing inquiries to support@wedid.it
- Refer to WeDidIt's Help Center for more FAQ's
- Access live chat support from the platform's floating 'help' button
HAPPY FUNDRAISING!
WEDIDIT