

# User Guide - Crowdfunding toolbox

In this application stage, you can create campaigns which contain widgets. These widgets (banners) can be shown on your portal.

Available widget types:

- **Landing page widget** (default monetization widget)
- **Sidebar widget** (rectangular - portrait orientation)
- **Fixed widget** (something like "Cookie bar" - overlaps content on portal, it can be displayed on the top or bottom part of the view)
- **Leaderboard widget** (rectangular - landscape orientation)
- **Popup widget**
- **Locked article** (widget which hide half of article content and add continue reading button)
- **Article widget** (it's widget which is displayed in article. It can be some text, etc.)
- **Custom HTML widget** (custom HTML widget with inline CSS styles)

You have access to basic CRM view. You can see how many users are reached, how many donations users created, how much money the campaigns brought, etc.

## Testing environment

<https://app.crowdfundingtoolbox.news> Application

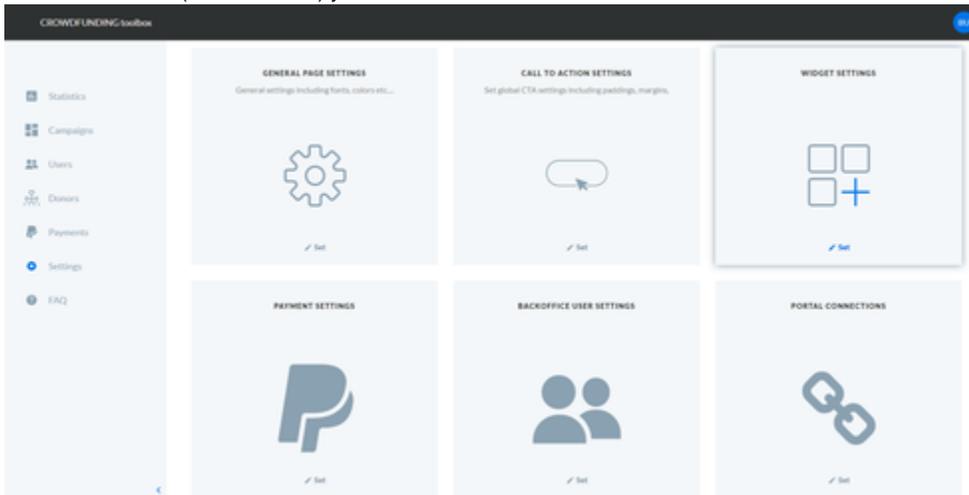
<https://www.demo-postoj.crowdfundingtoolbox.news> Portal

## Login details

Username: **demo**

Password: **demo123**

SETTINGS CARD (last in sidebar) you can see:



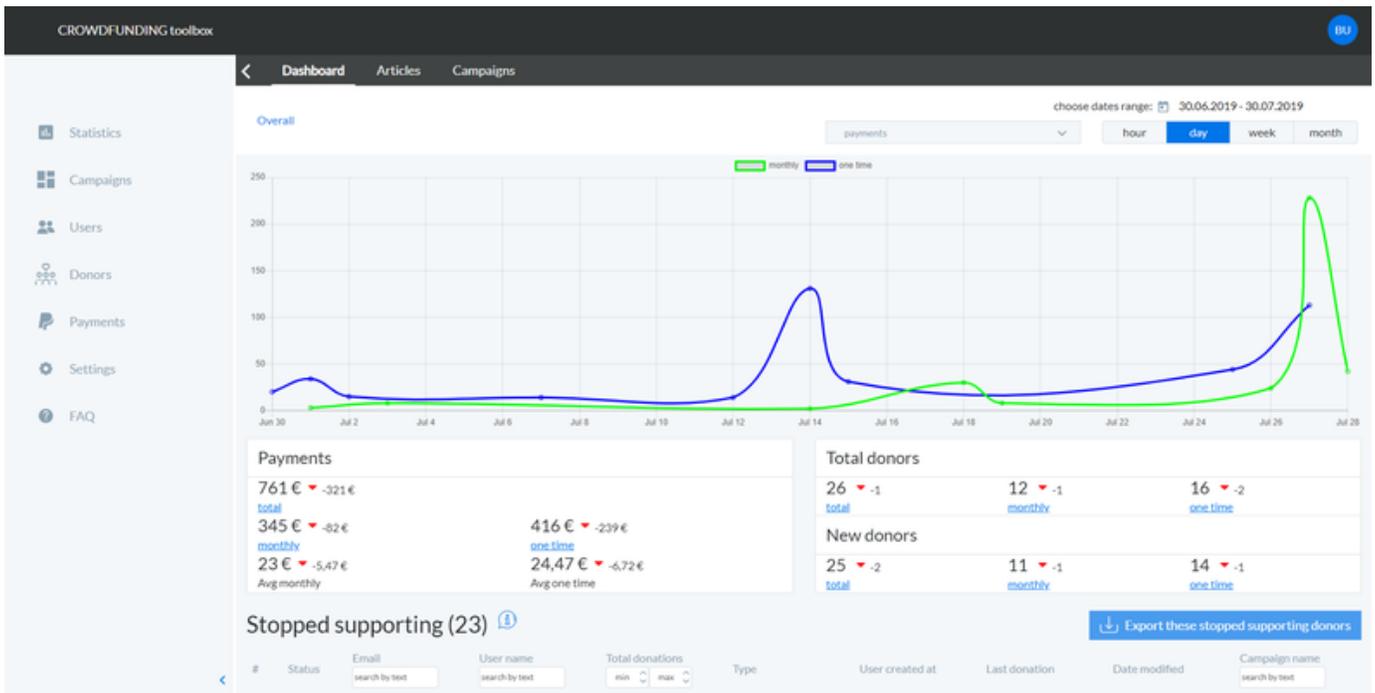
If you have manager role, you only see your settings. If you have administrator role, you see all items like in screenshot before.

**Remember: Before you start to create campaigns/widgets you need to set up your application. You need to set up General settings, CTA settings and widget settings.**

**You also need to set payment settings (for correct donating) with choose bank buttons.**

**In portal connections there are necessary settings for connection between your portal and application.**

Once signed in, the user is redirected to the statistics:



Here you can see stats graph for in the last month. You can see count of payments, count of donors, how many donors stopped supporting, how many donors didn't pay or how many users only initialized donation (they didn't go to step two).

You can also click on Articles and Campaigns statistics.

If you click on Campaigns (in left sidebar), you can see list of campaigns:

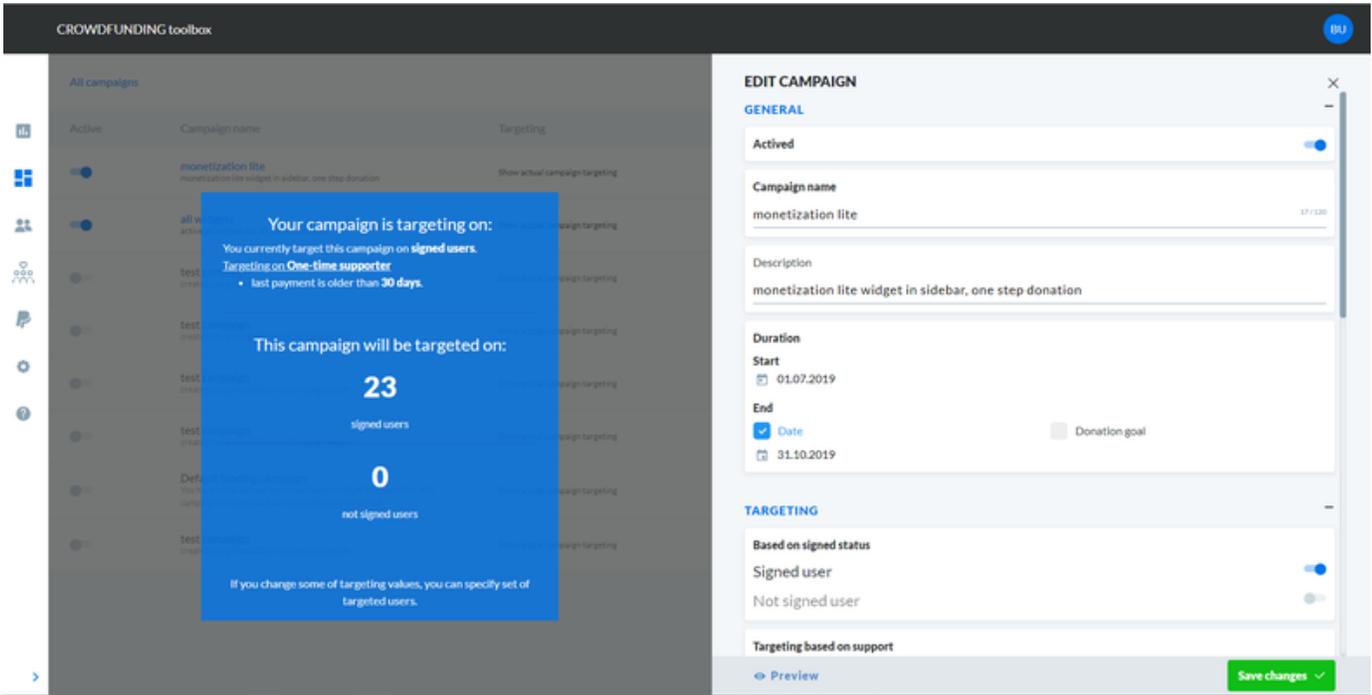
CROWDFUNDING toolbox

All campaigns

Choose campaign New campaign

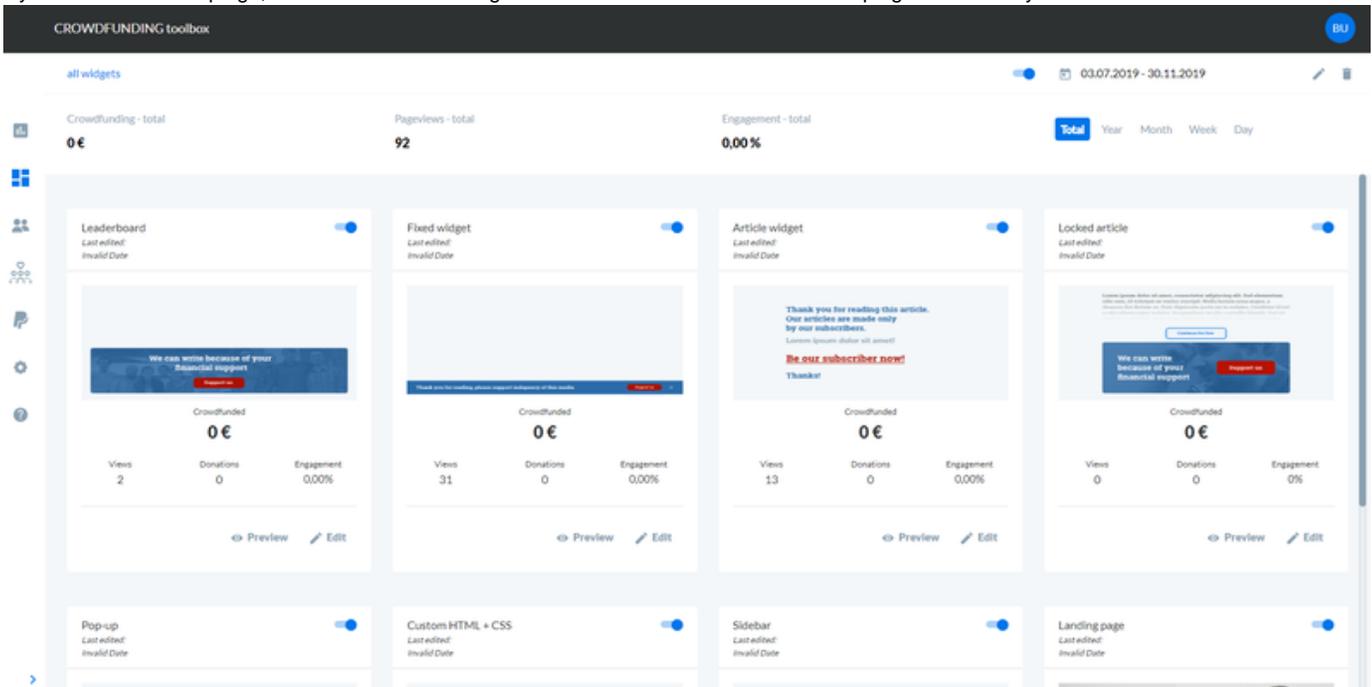
Active	Campaign name	Targeting	Views	Funds (€)	Start	Finish
●	monetization lite monetization-lite widget in sidebar, one step donation	Show actual campaign targeting	2	0 €	01.07.2019	31.10.2019
●	all widgets active all widgets for all users and pages	Show actual campaign targeting	92	0 €	03.07.2019	30.11.2019
●	test campaign created using CreateDummyCampaigndeeder	Show actual campaign targeting	202	386 €	04.06.2019	24.10.2019
●	test campaign created using CreateDummyCampaigndeeder	Show actual campaign targeting	212	459 €	10.06.2019	11.06.2019
●	test campaign created using CreateDummyCampaigndeeder	Show actual campaign targeting	172	481 €	10.06.2019	11.06.2019
●	test campaign created using CreateDummyCampaigndeeder	Show actual campaign targeting	194	438 €	10.06.2019	11.06.2019
●	Default landing campaign You have to has at least one monetization widget. To ensure this, this campaign is created and cannot be deleted or disabled.	Show actual campaign targeting	98	712 €	01.01.2000	01.01.2050
●	test campaign created using CreateDummyCampaigndeeder	Show actual campaign targeting	506	507 €	10.06.2019	11.06.2019

You can active/deactive campaigns show preview, clone campaign, edit it or create new one. If you create or edit campaign you can see targeting like this:



If you click on number of users, you can see list of users.

If you create new campaign, there are created 8 widgets in default format. You can see campaign detail after you click on list item.



In campaign detail you also see basic stats of campaign and widgets, You can change date range of campaign activation, and active/deactive or delete it.

If you click on edit (some of widget) now you see edit window and preview mode, like this:

CROWDFUNDING toolbox

PREVIEW MODE

Device width [px] 1366 Device height [px] 600 Scale [%] 100

**EDIT LEADERBOARD**

Take a note, this widget is positioning on whole width of parent container width (on your portal side) by default. If you want change widget width, set it up in BACKGROUND.

- BACKGROUND
- HEADLINE
- ADDITIONAL TEXT
- CALL TO ACTION BUTTON
- MONETIZATION

Live Preview Save changes

If you click on user icon (in sidebar) you can see list of users:

CROWDFUNDING toolbox

Export all users to csv

### All users

# + 9 more

#	Status	Email <small>search by text</small>	User name <small>search by text</small>	Total donations <small>min max</small>	Type	User created at	Last donation	Date modified	Campaign name <small>search by text</small>
1	●	mutar91@bubvinova.org	Jarolim Tobova	78€	Google Pay	29.07.2019	25.06.2019	25.06.2019	
2	●	viola55@gmail.com	Zoja Kocirova	20€	Credit card	29.07.2019	30.06.2019	25.06.2019	
3	●	svetosar66@nemcova.eu	Svetozar Senkovic	29€	Credit card	29.07.2019	23.05.2019	12.04.2019	
4	●	dusana.vicnova@zoznam.sk	Bernard Gallo	32€	Google Pay	29.07.2019	15.05.2019	05.03.2019	
5	●	valent.urban@tias.sk	Bohumila Krajarova	20€	Pay By Square	29.07.2019	27.07.2019	27.07.2019	
6	●	eskrinar@post.sk	Tichomir Svobodova	35€	Bank transfer	29.07.2019	13.05.2019	13.05.2019	
7	●	broniava33@centrum.sk	Laura Kovac	36€	Google Pay	29.07.2019	17.06.2019	29.05.2019	
8	●	podkonickyester@tatiana.sk	Fedor Nemcova	41€	Credit card	29.07.2019	25.06.2019	25.06.2019	
9	●	barbora.rus@itajiva.info	Radomir Chudik	16€	Pay By Square	29.07.2019	14.07.2019	14.07.2019	
10	●	vtarkasovsky@zoznam.sk	Erik Karvat	62€	Pay By Square	29.07.2019	09.05.2019	05.03.2019	
11	●	olga.tatar@yahoo.com	Melania Senko	7€	Apple pay	29.07.2019	17.06.2019	15.04.2019	
12	●	daniela.hudarek@gmail.com	Jela Dej	34€	Credit card	29.07.2019	07.07.2019	25.06.2019	
13	●	casovic.melania@vydareny.info	Marek Kopecky	4€	Google Pay	29.07.2019	28.05.2019	12.04.2019	
14	●	eva.kenka@starna.net	Sara Balazova	15€	Google Pay	29.07.2019	13.05.2019	13.05.2019	
15	●	balogova.vt@kapustova.info	Izabela Horvathova	44€	Credit card	29.07.2019	25.07.2019	14.07.2019	
16	●	ruzena.hulmanova@saedonova.sk	Frantiska Vicnova	42€	Apple pay	29.07.2019	25.06.2019	25.06.2019	
17	●	viadslan3@gmail.com	Branoslav Kostrec	89€	Credit card	29.07.2019	27.07.2019	27.07.2019	
18	●	weiss.fernand@kolnik.sk	Levoslav Novotna	40€	Credit card	29.07.2019	14.07.2019	14.07.2019	
19	●	rufus.melania@yahoo.com	Jitana Lintner	47€	Credit card	29.07.2019	27.07.2019	27.07.2019	

If you click on specific user you can see detail of user with possibility to change user information, donations and you can also delete user.

You can also export all users to csv format.

Donors page has similar format like users, but there are showed only users that sometimes in the past made donation.

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[All donors](#) [New donors](#)

### All donors

# + 9 more

#	Status	Email <small>search by text</small>	User name <small>search by text</small>	Total donations <small>min max</small>	Type	User created at	Last donation	Date modified	Campaign name <small>search by text</small>
1	●	dulla.sona@azet.sk	Leopold Poláková	76 €	Google Pay	29.07.2019	28.07.2019	08.06.2019	Default landing campaign
2	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
3	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
4	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
5	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
6	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
7	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
8	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
9	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
10	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
11	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
12	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
13	●	dusana00@lobodnikova.sk	Cibor Heško	95 €	Credit card	29.07.2019	27.07.2019	27.07.2019	test campaign
14	●	valent.urban@tas.sk	Bohumila Krájarová	20 €	Pay By Square	29.07.2019	27.07.2019	27.07.2019	Default landing campaign
15	●	valent.urban@tas.sk	Bohumila Krájarová	20 €	Pay By Square	29.07.2019	27.07.2019	27.07.2019	Default landing campaign
16	●	valent.urban@tas.sk	Bohumila Krájarová	20 €	Pay By Square	29.07.2019	27.07.2019	27.07.2019	Default landing campaign
17	●	valent.urban@tas.sk	Bohumila Krájarová	20 €	Pay By Square	29.07.2019	27.07.2019	27.07.2019	Default landing campaign
18	●	valent.urban@tas.sk	Bohumila Krájarová	20 €	Pay By Square	29.07.2019	27.07.2019	27.07.2019	Default landing campaign
19	●	valent.urban@tas.sk	Bohumila Krájarová	20 €	Pay By Square	29.07.2019	27.07.2019	27.07.2019	Default landing campaign

\*All users in these screenshots are mocked and fake.  
Payments page in sidebar:

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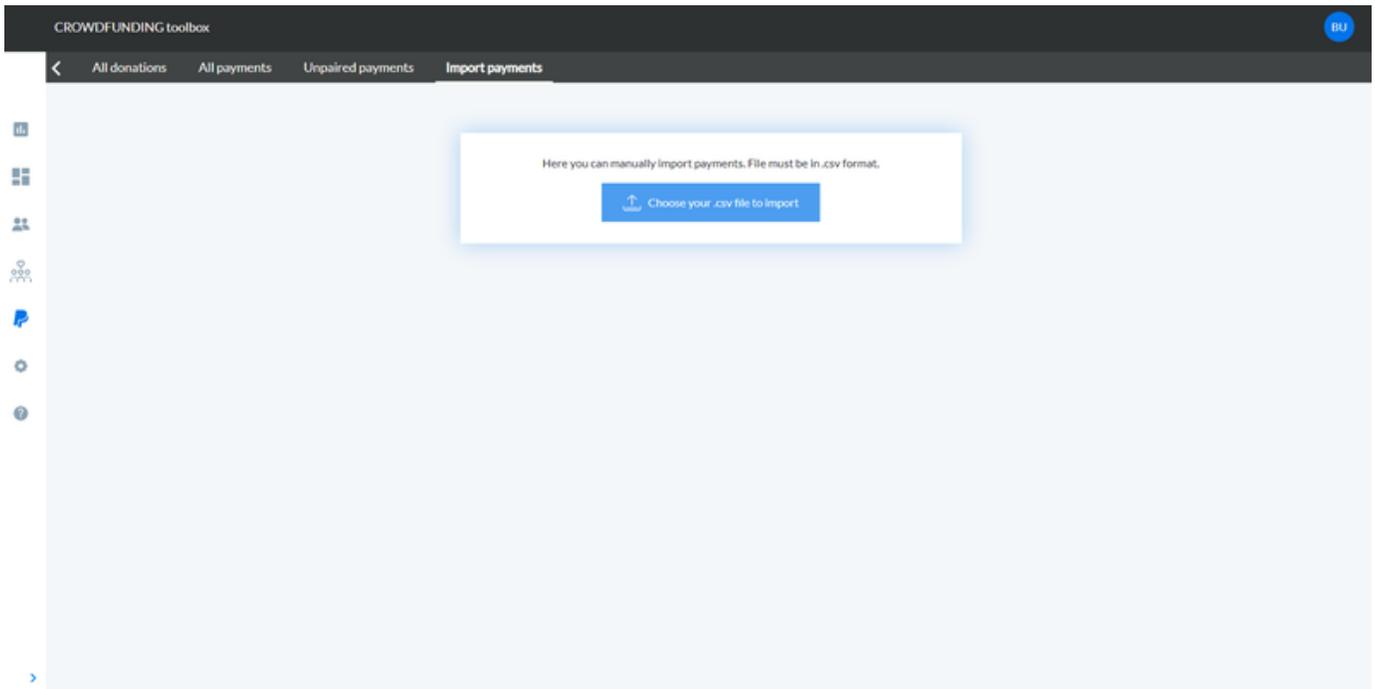
[All donations](#) [All payments](#) [Unpaired payments](#) [Import payments](#)

dates range: 30.06.2019 - 30.07.2019

# + 6 more

#	IBAN <small>search by text</small>	Variable symbol <small>min max</small>	Amount <small>min max</small>	Donation created at	Payment date	Campaign name <small>search by text</small>
1	SK285453351817315	100001	8 €	19.07.2019	19.07.2019	test campaign
2	SK8453747954009720	100015	42 €	28.07.2019	28.07.2019	Default landing campaign
3	---	---	43 €	09.07.2019	---	test campaign
4	SK3092360453254430	100016	14 €	12.07.2019	12.07.2019	Default landing campaign
5	---	---	6 €	17.07.2019	---	test campaign
6	SK1956271594088390	100040	30 €	18.07.2019	18.07.2019	Default landing campaign
7	---	---	1 €	07.07.2019	---	test campaign
8	SK3248915709168604	100048	3 €	01.07.2019	01.07.2019	Default landing campaign
9	---	---	29 €	23.07.2019	---	test campaign
10	SK8160828421837173	100049	34 €	01.07.2019	01.07.2019	test campaign
11	SK3034087310796130	100050	14 €	07.07.2019	07.07.2019	test campaign
12	SK422401189924435	100057	20 €	30.06.2019	30.06.2019	test campaign
13	SK4072811662222176	100060	37 €	14.07.2019	14.07.2019	test campaign
14	SK9956292624271360	100060	30 €	14.07.2019	14.07.2019	test campaign
15	SK3044086715543001	100063	2 €	14.07.2019	14.07.2019	test campaign
16	---	---	19 €	14.07.2019	---	test campaign
17	SK8130434266954322	100064	31 €	13.07.2019	13.07.2019	Default landing campaign
18	SK3905638820015333	100066	40 €	14.07.2019	14.07.2019	test campaign
19	SK8328507547739548	100067	16 €	14.07.2019	14.07.2019	test campaign

You can show all donations in system. If you click on All payments (top panel), you can see list of all payments. Once you click on Unpaired payments, you can pair all choosed payments to user (by IBAN). In Import payments you can import csv file with payments.



CSV file must have this shape:

| [Processing date](#) | [Settlement date](#) | [Sum](#) | [Currency](#) | Type (credit/debet) | Prefix | [Account number](#) | Bank code | [IBAN](#) | [Variable symbol](#) | [Specific symbol](#) | [Constant symbol](#) | [Payer reference](#) | Information | Description |

Import process find match with donations and pair it. If same payment is already in database, it skipped this payment.

### Supported browsers:

*\* we recommend to use the newest version of supported browsers*

- Google Chrome
- Mozilla Firefox
- Safari
- Opera
- Brave
- Microsoft Edge (*only svgs are not displayed correctly in Edge*)