



Self-Guided Sign-up & Partnership Guide

For Charities, Non-Profits & NGOs

## *Sign-up: It's as easy as 1, 2, 3!*

1

Fill out our  
Online Sign-  
Up Form

~5 mins

2

Sign-In to the  
Charity Portal  
to add  
Administrator  
Details &  
Copy  
Dedicated  
URL

~3 mins

3

Review the  
rest of the  
Guide to Plan  
Your Email  
blast and  
Social posts

~ 60 minutes

**Important:** *ihiveLIVE, at its own discretion, reserves the right to suspend or deny service to any organization which is misaligned with ihiveLIVE's brand values, contravenes ihiveLIVE's Terms of Service or Privacy Policy or fails remain in good standing with any government or regulatory body.*

## Getting Started



## Designate an Administrator to be your coordinator

**The role of the Administrator would generally include the following:**

- Keeping senior leadership of your organization informed and engaging them when necessary in decision-making
- Becoming knowledgeable of the ihiveLIVE system and data and learning how to optimize activation of your membership
- Coordinating planning and communication delivery to members of potential members on behalf of your organization
- Providing feedback to ihiveLIVE on behalf of the organization
- Receiving or directing payments from ihiveLIVE



## Organizational Details

The administrator should launch the following page and fill out the following information: <https://web.ihivelive.com/charity/signup>

Type in the Name of your Charity, Non-Profit or NGO in the **NAME** field

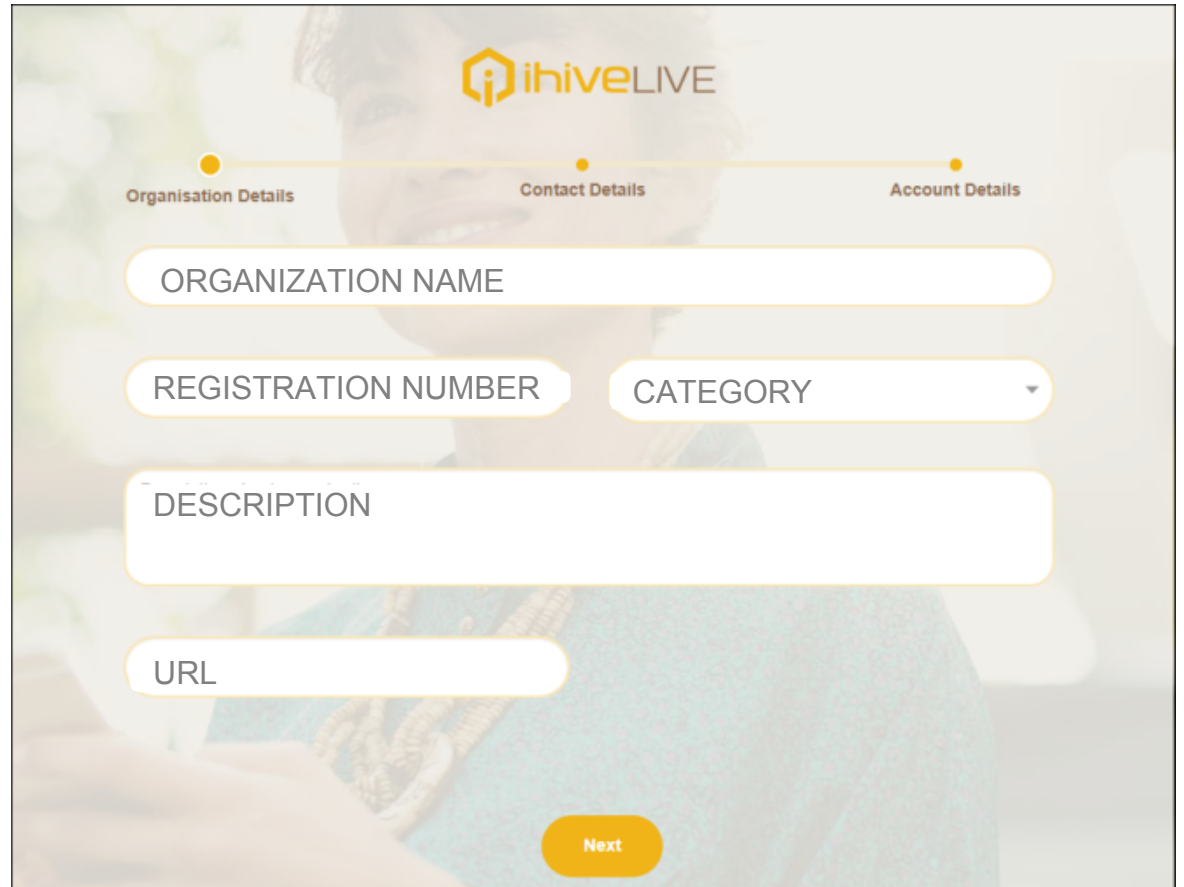
Type your Charitable Registration or Business Identification number in the **REGISTRATION NUMBER** field

Select the type of cause you support from the **CATEGORY** drop-down

Describe your organization and its cause in the **DESCRIPTION** field (visible to members)

Paste your primary URL into the **URL** field

Click **NEXT**



ihiveLIVE

Organisation Details      Contact Details      Account Details

ORGANIZATION NAME

REGISTRATION NUMBER      CATEGORY

DESCRIPTION

URL

Next

# Sign-up

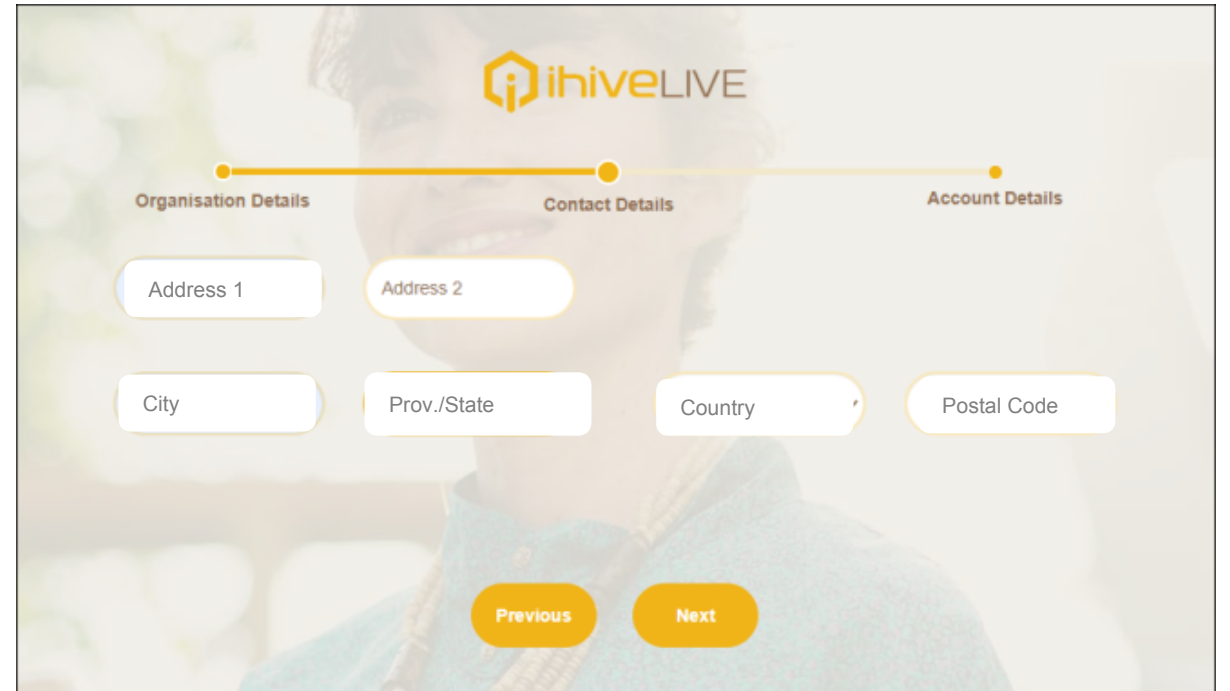
1



## Contact Details

Complete the address of your organization by filling in the appropriate fields completely.

Click **NEXT**



ihiveLIVE

Organisation Details      Contact Details      Account Details

Address 1      Address 2

City      Prov./State      Country      Postal Code

Previous      Next

# Sign-up

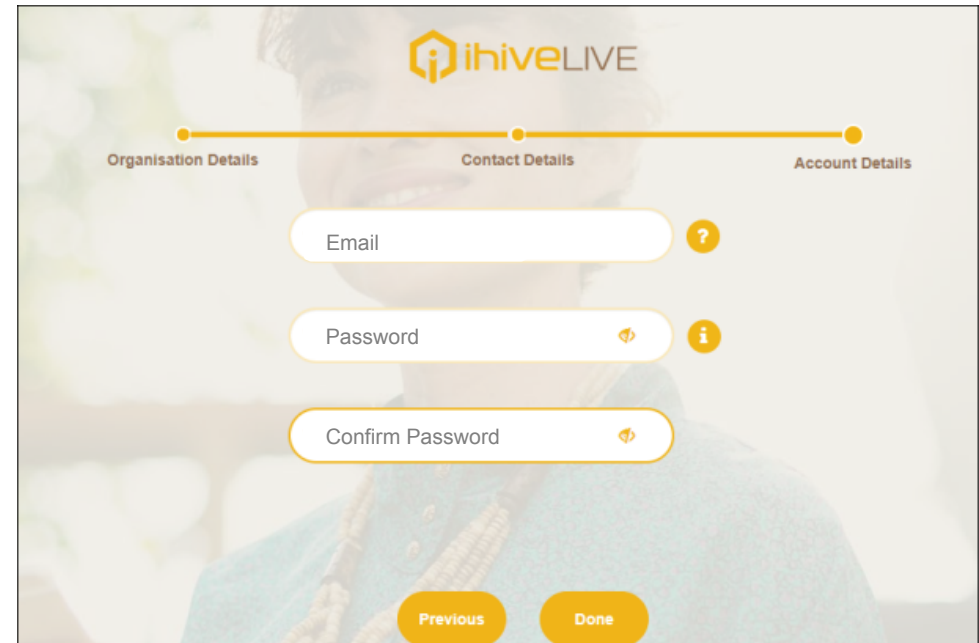
1



## Account Details

Insert a primary corporate email through which to receive regular contact and payments or that of the empowered individual who will be responsible all aspects of the relationship with ihiveLIVE. Select and confirm an appropriate password.

Click **NEXT**



ihiveLIVE

Organisation Details      Contact Details      Account Details

Email ?

Password ⓘ ⓘ

Confirm Password ⓘ

Previous      Done





## Charity Portal

After registering the charity will use this link to access the Charity

Portal: <https://web.ihivelive.com/charity/login>

The information you will find in your Charity Profile is a combination of information that you provide and that ihiveLIVE provides.

Here you will find your organization's unique onboarding link (MyMember sign-up link) that you can share with your supporters when inviting them to sign up with ihiveLIVE.

Registered partners will be able to sign-in to the Charity Portal on the ihiveLIVE sharing platform and will be able to view data and information specific to their organization, such as the ihiveLIVE members who are supporting them, contact info (based on their permission), support levels and total donations.

Please keep information up to date including contact and administrator details for your charity.

**IMPORTANT:**  
Please continue  
your set-up by  
following the  
instructions on the  
next page





## Sign-up

2



- A.** Click the menu at the top right of the screen and select **MYPROFILE** from the drop-down menu.
- B.** Scroll down to the bottom of the first page and click **COPY LINK** for the dedicated URL you can include in your email and social media campaigns
- C.** Click **EDIT** at the top of the screen followed by **EDIT** beside the Circle. Follow the instructions to upload your logo.
- D.** Click **SAVE** and **NEXT** at the bottom of the page.
- E.** Scroll to the bottom of the next page and click **NEXT** so you get to *Administrator Details*
- F.** Click the **EDIT** button at the top of the screen and complete the **NAME** and **PHONE** fields of your Administrator

ihiveLIVE Charity > MyDashboard

Your Organization

Your Organization

ihiveLIVE Charity > MyProfile

Your Organization

**If you've completed steps A-F then you're done! Read on for step 3 to prepare to your marketing plan.**

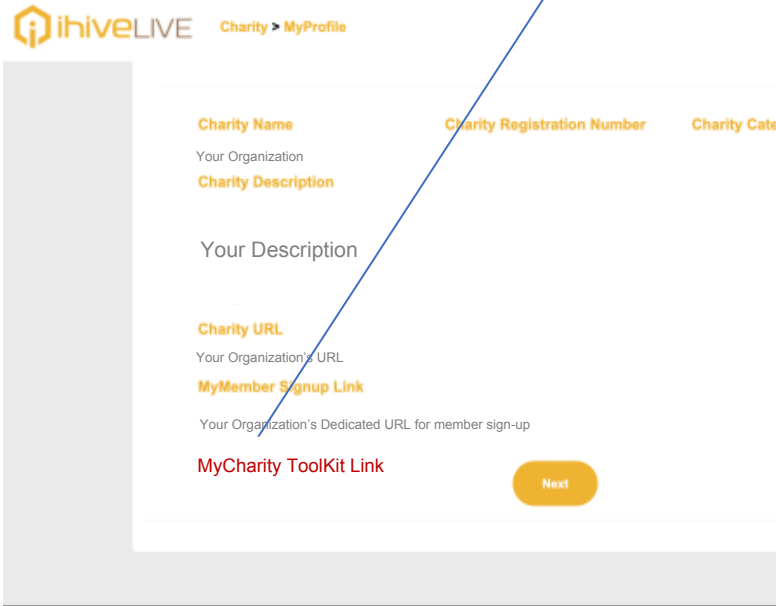


## Charity Toolkit

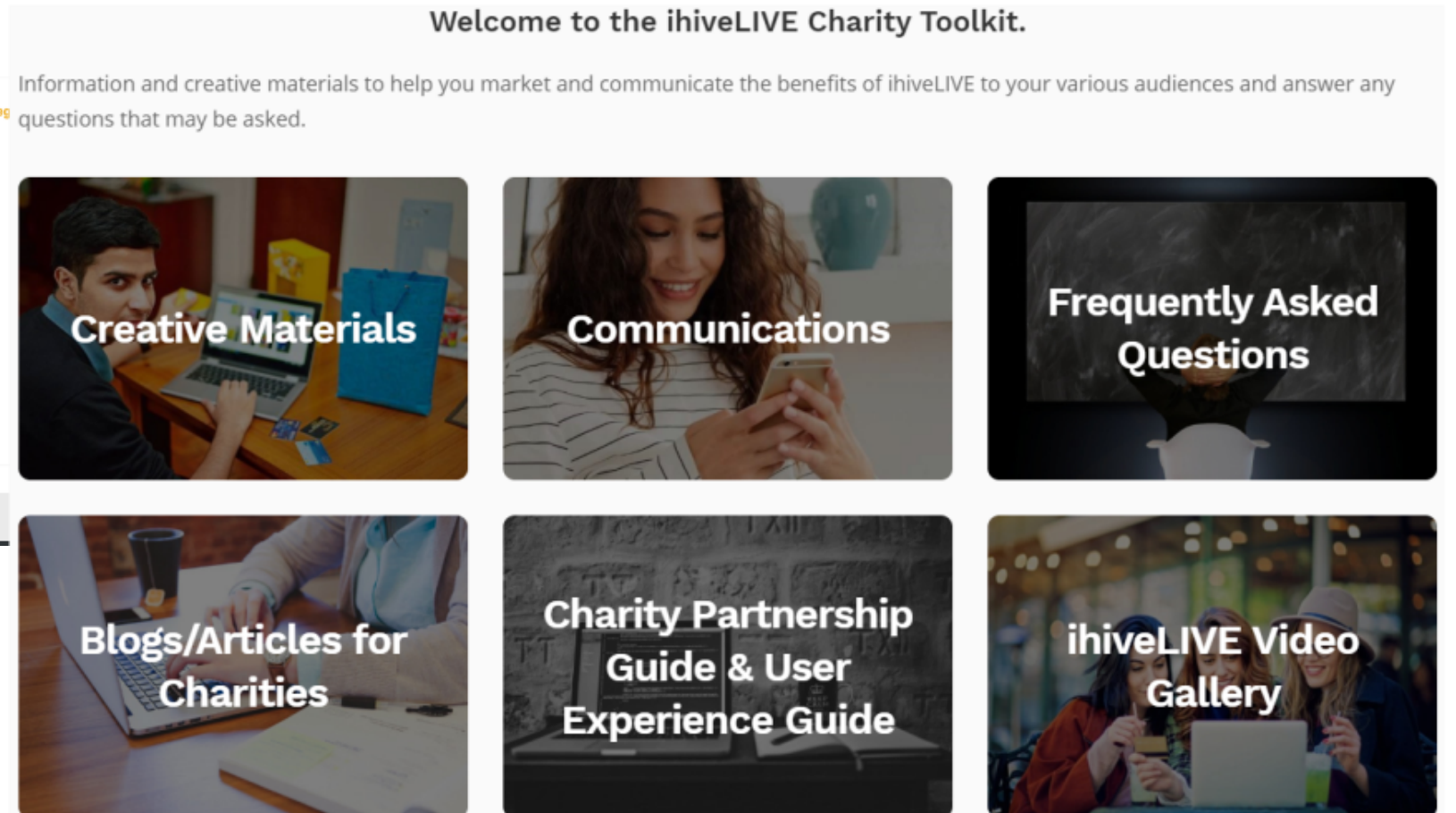
We have created a Charity Toolkit which contains information, templates and creative materials to help you market and communicate the benefits of ihiveLIVE to your various audiences and answer any questions that may be asked. **You will find a direct link to the Toolkit in your Charity Portal.**

### Charity Toolkit 3

We want to make it simple and easy for you to promote the benefits of ihiveLIVE to your supports and friends and family. The Toolkit will be updated regularly, so you should reference it often.



The screenshot shows the registration form for a charity on the ihiveLIVE platform. The form includes fields for Charity Name, Charity Registration Number, Charity Category, Charity Description, Charity URL, MyMember Signup Link, and MyCharity ToolKit Link. A 'Next' button is visible at the bottom right of the form.



Welcome to the ihiveLIVE Charity Toolkit.

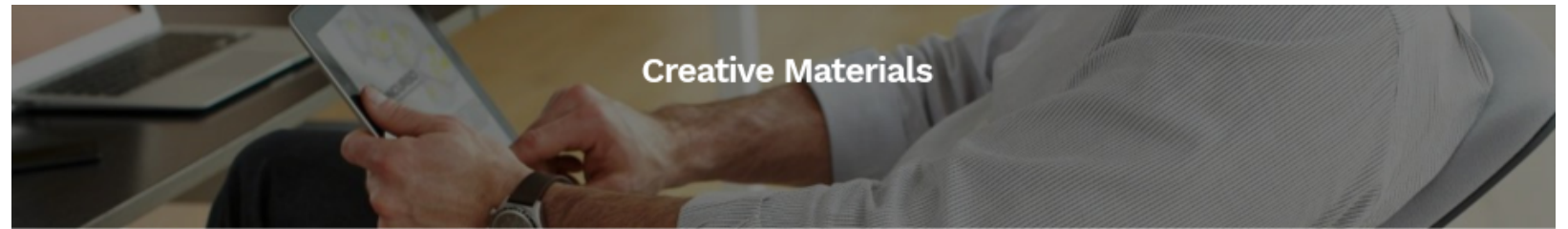
Information and creative materials to help you market and communicate the benefits of ihiveLIVE to your various audiences and answer any questions that may be asked.

- Creative Materials
- Communications
- Frequently Asked Questions
- Blogs/Articles for Charities
- Charity Partnership Guide & User Experience Guide
- ihiveLIVE Video Gallery






## Creative Materials

In this section of the Toolkit you will find creative materials that you can use in your various communications and marketing activities in promoting ihiveLIVE to your supporters. Here you will be able to find the ihiveLIVE logo, branding guide, memes, and other creative applications for you to consider.

A banner image showing a person's hands using a tablet, with the text 'Creative Materials' overlaid in white.

Creative Materials




-  ihiveLIVE Brand Logo Kit
-  ihiveLIVE Charity Banner Kit
-  ihiveLIVE Charity Media Kit



## Communications Section

The following communication templates have been created to reduce the work effort for you, although we recognized you will customize them. We're looking forward to learning what messages and engagement techniques will be most effective with your donors. Over time, we will share best practices and increase and improve the templates and examples in this section.

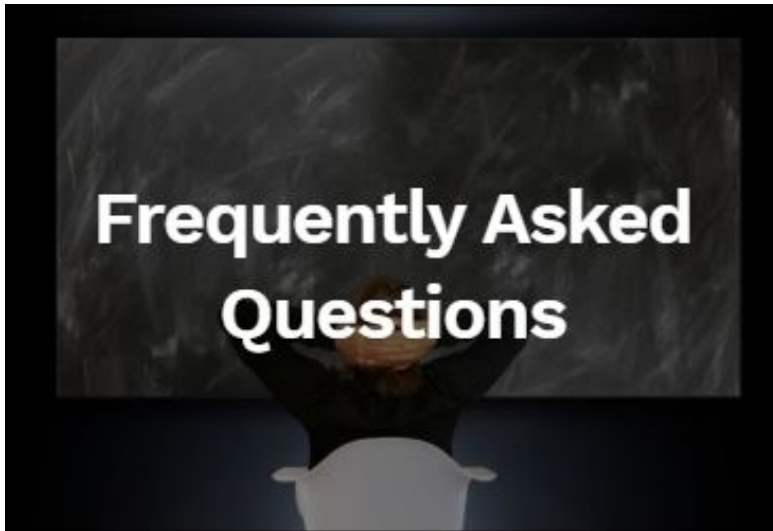
Communications Materials

		
<b>Member Invitation Template for Charities</b>	<b>Friends &amp; Family Invitation Template for Charities</b>	<b>Active Member Greeting Template for Charities</b>
This is a sample template with content and links to invite your supporters to sign up with ihiveLIVE.	This is a sample template with content and links to invite family and friends to sign up with ihiveLIVE using your unique charity "MyMember sign up link".	This is a sample template with content and links to thank your supporters for signing up with ihiveLIVE and updating them on the difference they have made financially.

# Frequently Asked Questions

Here you'll find answers to some of the most frequently asked questions that we anticipate may be asked by your supporters. So when you are asked a question about any aspect of ihiveLIVE, reference this section and have a look at the FAQs listed on this page – the answer you're looking for might be there.

If the answer is not posted here, then please contact us and we will help you formulate an answer; which we can then add to this section to share and help others who may be asked a similar question.



- + Why is ihiveLIVE doing a pilot project?
- + What are the benefits for the charity?
- + What are the things that the charity should do?
- + Will ihiveLIVE provide the charity with regular reports?
- + What is the ihiveLIVE Charity Toolkit? How can the charity access it?
- + What is the ihiveLIVE Ambassador Program? How does it work?
- + What happens after the pilot project is done?
- + Why is the purpose of a Letter of Intent?



## Blogs and Articles

This is where you will find a wide range of information and commentary specific to the charitable sector as well as articles on how to get the most out of your partnership with ihiveLIVE. We plan to have a variety of authors and sources engaged to provide meaningful content for you and your charity.

### ihiveLIVE Blogs/Articles



#### Your Charity Portal: Insight, Trends, Opportunities.

Our first ihiveLIVE Blog focuses on helping charities get the most out of their personalized Charity Portal experience. From basic how to actions to ideas on how to gain valuable insights from the data, identifying trends and how that can translate into opportunities.





## Partnership Guide and The User Experience Guide

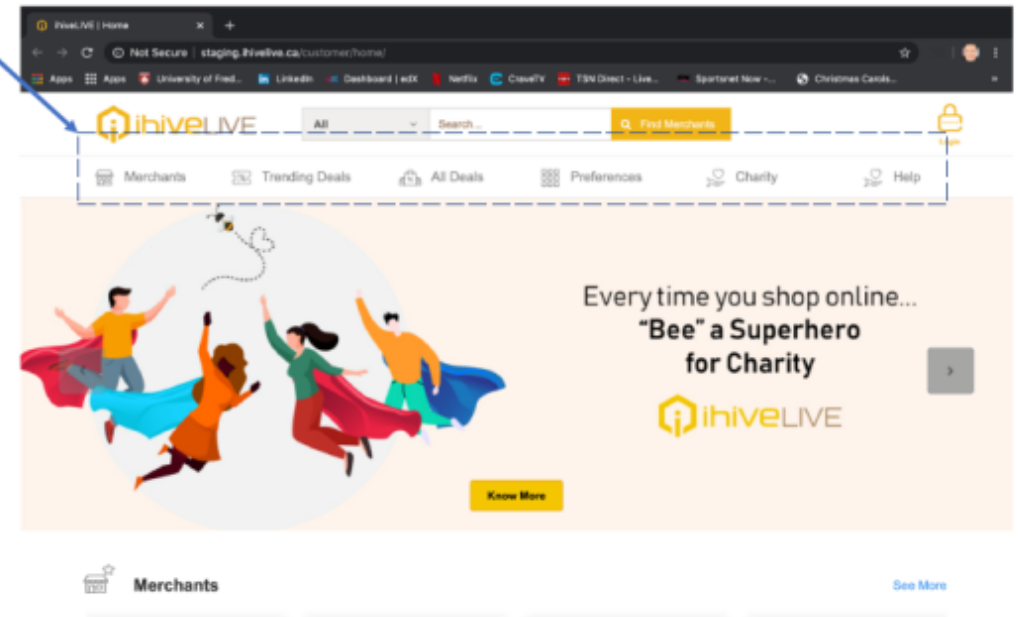
We have published a copy of the Partnership Guide as part of the Charity Toolkit.

In addition we have created a User Experience Guide that has been developed to help a new user navigate the ihiveLIVE platform from onboarding to shopping to their personal dashboard. This will be a very practical guide for the Internal Pilot Coordinator role and for other charity personnel who can familiarize themselves with how to get maximum benefits from using ihiveLIVE.

### Description / Instructions:

- Welcome to the ihiveLIVE web-based portal
- Check the menu near the top of the screen. It gives you quick links to: Merchants, Trending Deals, All Deals, Preferences, Charity and Help
- If it's your first time visiting make sure you've updated Preferences and Charity
- If you're here to shop (yay!) you can click on Merchants, Trending Deals or All Deals to explore
- If you have a particular Merchant you're searching for click the search box at the top of the screen, enter the name and click Find Merchants
- Please note, ihiveLIVE is new and we may not have signed up your preferred merchant yet. We will update you as new merchants are added. In the meantime, we hope you'll explore all our merchants and make purchases that benefit you and your charity.

## Landing Page







You can use our videos to promote ihiveLIVE to your supporters, family and friends.



**Explainer Video for ihiveLIVE**  
Short, animated style video that explains how ihiveLIVE works and its beneficial impact on charitable causes. Time is 1 minute 23 seconds.



**Raising Money for Your Charity Video, Purchase of Puzzles**  
Shows an ihiveLIVE member opening and displaying a purchase of several puzzles made using ihiveLIVE, and illustrates the amount generated for charity. Time is 1 minute.



**Raising Money for Your Charity Video, Purchase of Assorted Teas.**  
Shows an ihiveLIVE member opening and displaying a purchase of packages of tea made using ihiveLIVE, and illustrates the amount generated for charity. Time is 1 minute.



**ihiveLIVE Explained in Two Minutes**  
Short, animated style video that explains how ihiveLIVE works and its beneficial impact on charitable causes. Ends with a "Join Now" button. Time is 2 minutes.



**ihiveLIVE Video Game**  
Animation illustrated as a "video game" showing the rapid purchases of products using ihiveLIVE. Ends with a "Join Now" button. Time is 23 seconds.

## Communication Planning

3



# Communication Planning & Customization

Here are the key communication activities to prepare for:

1. Identification of audiences. Consider the best contact approach and method for your donors, volunteers, employees and corporate partners or sponsors. In many cases email contact will be the preferred method. If you are not specifically responsible for the disbursement of communications using email lists, check with your internal partner to confirm the approximate number of individuals in each category.
2. Review the template communication materials found in the ihiveLIVE toolkit and confirm your readiness to send on the launch date. Determine what updates may be appropriate to your main website to highlight the launch of your partnership with ihiveLIVE and encourage visitors to 'Learn More'
3. Finally, consider what best practices you've used in the past to promote new campaigns on social media.

Please Note: with each media format it is important to provide potential members with your organization's unique onboarding link (***MyMember sign up link***) available on your personalized Charity Portal. This link will direct the donor through a specialized sign-up flow which ensures your charity will be selected and locked-in for a 6 month period. Moreover, it will assist us with measuring the successful conversion of your invited donors

### **Important:**

Familiarize yourself with our [User Experience Guide](#) and FAQs in the ToolKit and sign-up yourself in advance of the launch so that you are familiar with the process.

## Final Things to Consider

3



## Launch Day & Document Your Success

Today is the day and you are ready to 'go live' with ihiveLIVE. All the pre-planning will make this a relatively easy exercise as key groups, such as donors, volunteers, employees and corporate partners and sponsors are notified automatically via email.

### Testimonials and Success Stories

- Collect testimonials and success stories throughout the pilot and determine whether they could be placed on your website or included in reminder or update email blasts.

Sign-in regularly to the Charity Portal to monitor your member :  
<https://web.ihivelive.com/charity/login>

**Good Luck!**

If you have questions or concerns, please contact us at:  
[support@ihivelive.com](mailto:support@ihivelive.com)