

# MobileCause Settings

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## Logging In To Your Account

Go to [mobilecause.com](https://mobilecause.com) and click login (top right)



User Email: [XXX@XXXX.XXX](mailto:XXX@XXXX.XXX)

Password: changeme

## Dashboard Overview

When you log into your account, you'll see your account at a glance:

- The first box shows total donations
- The second shows subscriptions including how many messages you have sent this month as well as the number of mobile subscribers that you have
- The third box shows six different helpful training videos on the MobileCause tools that are available to you.

Underneath, you will see your campaigns in the form of tiles. If you are new to MobileCause, you may only have a **New Campaign** tile to start creating your campaigns.

Campaigns

Keywords

Sort ▾

Send Message ▾

New Activity

Sandbox 2017

RAISED  
\$0

COLLECTIVE GOAL  
\$140,000

0  
GIFTS

\$0  
AVG. GIFTS



New Campaign

## Changing Your Password

Click on your name in the top right of your dashboard and click **Profile**.

A blue dropdown menu for user Scott Couchman. It features a question mark icon, a blue square with a white 'S', and the text 'Scott Couchman' and 'MobileCause Academy (Training)'. Below this is a 'REPORTING' menu item with a downward arrow.

Enter your current password and a new one twice.

Current Password	Password	Confirm Password
<input type="password"/>	<input type="password"/>	<input type="password"/>

Enable Email Notification for Failed Recurring Donation

**API Token Key:** To manage your API Token Key please visit the [Developer Portal](#)

## Adding Users to Your Account

Click Settings (the Gear icon) in the upper right hand corner of your dashboard.

A blue dropdown menu for user Scott Couchman, similar to the one above. It features a question mark icon, a blue square with a white 'S', and the text 'Scott Couchman' and 'MobileCause Academy (Training)'. Below this is a 'REPORTING' menu item with a downward arrow. The gear icon (Settings) is highlighted with a mouse cursor.

Then click the New User button.

- Users
- Fundraisers
- Organization
- Receipts and Notifications
- Remittance
- Billing

+ Add User

Security Settings

Name	Email	User Name	Mobile Number	Verification	Admin	Actions
Scott Couchman	scouchman+demo@mobilecause.com	scottcouchman	(626) 512-9046	✓	✓	<a href="#">✎</a> <a href="#">✖</a>
Ford Prefect	scouchman+demo2@mobilecause.com	fordprefect				<a href="#">✎</a> <a href="#">✖</a>
Arthur Dent	scouchman+demo42@mobilecause.com	arthurdent				<a href="#">✎</a> <a href="#">✖</a>

There are two permission levels for Users:

- Admin Users can make changes to the User Administration section or make changes in the Settings in your MobileCause Account.
- Non-admin Users can make changes to your online forms and export reports.

If someone needs the ability to create more users, be sure to make them an Admin.

## Verifying Remittance Information on Your Account

Click Settings in the top right of your Dashboard. Click on Remittance on the left hand menu. Confirm that the correct address is listed, as any funds raised prior to your Merchant Account being set up will arrive via check to this address.

- Users
- Fundraisers
- Organization
- Receipt Configuration
- Remittance**
- Billing
- Payment Methods
- Order History
- Organization Logo
- Shared Settings

### Remittance

This is the person in your organization to whom MobileCause will send checks for monies raised.

First Name

Last Name

Email

Address

City

State

Zip

Phone Number

Save

*Note: once your Merchant Account is set up, there will be no need to receive paper checks from MobileCause.*

## Choosing Your Organization Short Name

Click Settings, then Organization. Create a recognizable Short Name that your donors will recognize that fits within the 15-character limit. Your Organization Short Name will appear in text messages to your donors and as a hashtag if they tweet about you after they donate.

### Organization

Organization Name

Short name


EIN


Info Email

Website URL

Sector

Privacy and Terms Link

 Twitter account setup

 Facebook sharing enabled

## Organization Logo

Click on Organization Logo on the left hand menu. Click File to upload an image from your computer or URL to upload an image using a link to that image. Select the image you wish to upload by clicking Choose Logo. Upload a .JPG or .PNG file that has an aspect ratio of 80:27 (for example, 400 x 135 pixels or 800 x 270 pixels)

This logo will show on tax receipts that are emailed to your donor after they complete a donation and on

the Thank You page after your donor completes their donation.

## Settings

Users

Fundraisers

Organization

Receipts and Notifications

Remittance

Billing

Analytics

Payment Methods

Email Processors

Order History

**Organization Logo**

Shared Settings

QR Codes

### Organization Logo

URL

 Choose Logo



## Configuring Your Tax Receipt

Click on Receipt Configuration from the left hand menu to customize the Thank You Message on your email tax receipts. You can also customize the sender email by adding a contact email.

# Settings

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QR Codes

## Receipts & Notifications

Configure the default receipt and notifications settings that will be used when you create a new form

### Receipts

#### Receipt Message

Thank you for your support to MobileCause Academy (Training)

#### Contact Email

scouchman@mobilecause.com

*Emails will send from this address*

#### Email Subject Line

Thank you for your support

*Your preferred subject line for the donation receipt email*

#### Contact Phone

818-495-4531

*Don't want to receive calls? Don't add your phone number!*

#### Include Tax Info

*Donors can claim tax deduction with an IRS compliant receipt.*

Show

#### Compliance Message

No goods or services were received in return for this gift. MobileCause Academy (Training) is a 501(c)(3) charity.

Preview PDF Attachment

### Notifications

Save

## Setting Up Your Merchant Account:

1. Complete all fields on the [application form](#).
2. Send an image of a voided check or a bank letter to [merchantaccounts@mobilecause.com](mailto:merchantaccounts@mobilecause.com) (this will be uploaded to the merchant account provider along with the completed form).
3. Complete the digital signature form (this will be sent to the email address listed as the contact on the application form).

To order your credit card swiper, please [contact Support](#).

The review process will take 2-3 business days from the time of submission. As soon as the application is approved, the merchant account will be activated and linked with your MobileCause account.

You will receive an automated email with your merchant ID and a link to create a login for the merchant center portal.

4. Confirm your account by clicking the link, creating your user login, and logging in to the merchant center.

[Click here to setup merchant account](#)

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