ThankFirst Portal Training Manual

A step-by-step guide for new staff, with the matching training video (1:06:41, 37 chapters)

2026-11-18

How to use this manual

- **Exact labels:** words in **bold** are the exact text you'll see on screen: buttons, links, headings and messages.
- **Screenshots:** red numbered boxes point at the control each step uses. The examples use a demo organization with fictional donors, and private values such as QR codes and keys are hidden.
- **Video:** each chapter has a matching chapter in the training video, with the same number and title. The box under each chapter heading gives its start time.
- **Cautions and availability:** items marked ⚠ are cautions. Some features depend on your organization's setup or plan; those chapters say what to check and whom to ask.
- **Roles:** each procedure names the role it needs. If something isn't in your role, see chapter 36.

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One-page quick-start

1. **Accept your invitation.**
   - Open the invite link your admin sent and check that the page says **You've been invited as {your role}**.
   - Sign in or create an account with the invited email address, then click **Accept invitation**.
2. **Know your home page.**
   - Staff and committee roles start on **Today**.
   - Board Viewers start on the **Dashboard**.
3. **Use the left sidebar.** It shows only what your role can use.
   - The **Fundraising** group holds programs.
   - The **Admin** group appears only for Org Admins.
4. **Find a donor.** Go to **Donors**, type in **Search name, org, or email…**, then click a row to open the profile.
5. **Record what happened.**
   - On a donor profile, use **Log gift** or **Log interaction**.
   - Thank-yous and asks you log drive the thank-you ratio and the **OK to ask** signal.
6. **Work your day.** On **Today**, act on each item:
   - **Complete**, or **Log thank-you** / **Log contact**;
   - **Snooze…**, **Reschedule…** or **Assign…**;
   - **Dismiss…**, giving a reason.

   Each action shows a short confirmation line, for example **Done: …**.
7. **Track follow-ups.** Under **Tasks**, use **New task**, then **Complete** or **Cancel**. Cancelled tasks stay in **History**.
8. **Committee members** see only the donors assigned to them, on **My donors · Today** and in **Donors**.
9. **If a page says "Staff only" or "Admins only", or sends you back to the Dashboard,** your role doesn't include that area. Ask your Org Admin (see chapter 36).
10. **Help is available.**
    - **Donor categories** are explained in the user menu (top right).
    - Org Admins also have **Help & Guides** in the sidebar.
11. **Protect your sign-in.** Turn on two-factor authentication under **Settings** → **Security** (chapter 2.2), and never share codes, keys or exported files.

DAY 1 — GETTING ORIENTED

0. Welcome and how to use this training

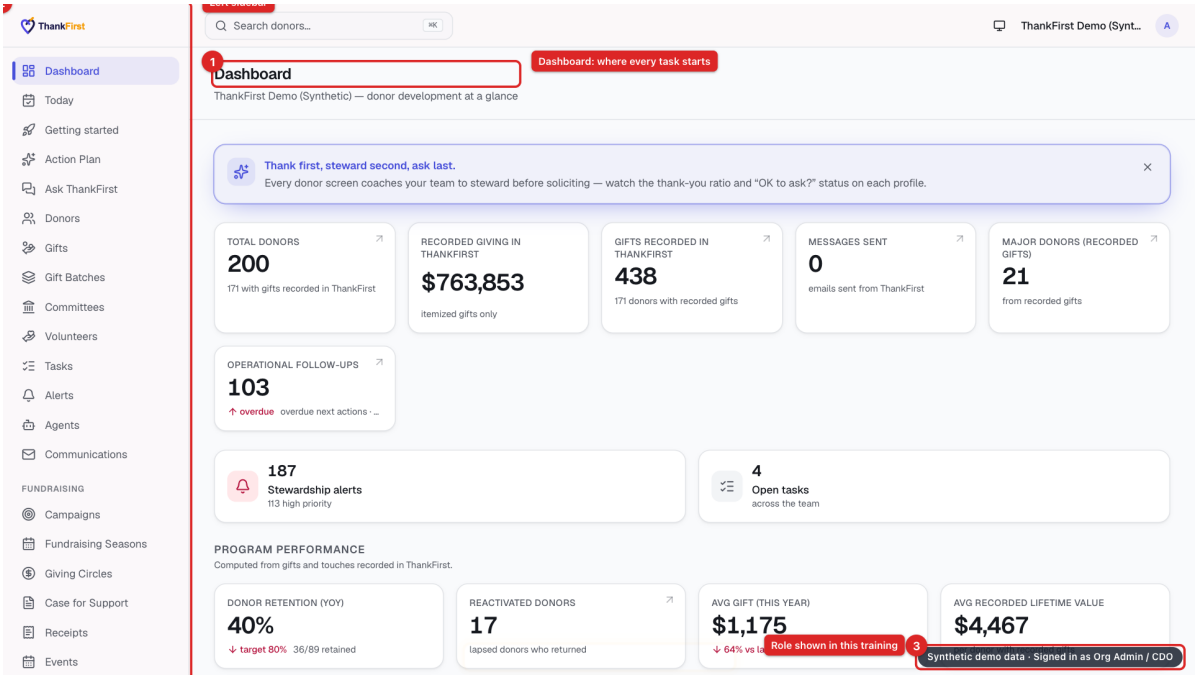
Video chapter 0 starts at 0:00.

Welcome to ThankFirst. This training follows your first week: signing in, finding your way, donors, daily work, fundraising programs, committees, and the admin track.

0.1 Get oriented

Goal: Know how this training works. **Role needed:** Everyone. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
   – You'll know you're there: The badge at the bottom of the training video shows the signed-in role.



W00-1: Dashboard: where every task starts Left sidebar Role shown in this training

0.2 More about this topic

How the training is organized: it follows a realistic first week:

- **Day 1:** orientation;
- **Day 2:** donors;
- **Day 3:** everyday work;
- **Day 4:** fundraising programs;
- **Day 5:** board and committee work;
- **Admin track:** organization administration.

How to use it:

- Each chapter has a matching video chapter with the same number, so you can watch straight through or jump to one task.
- Each procedure lists the role it needs. If your role can't do something, chapter 36 explains what you will see and what to do.

About the examples: all examples use the synthetic demo organization **ThankFirst Demo** with fictional donors (for example `firstname.lastname.N@example.com`). No real donor data appears anywhere in this training.

1. Roles: organization roles vs committee roles

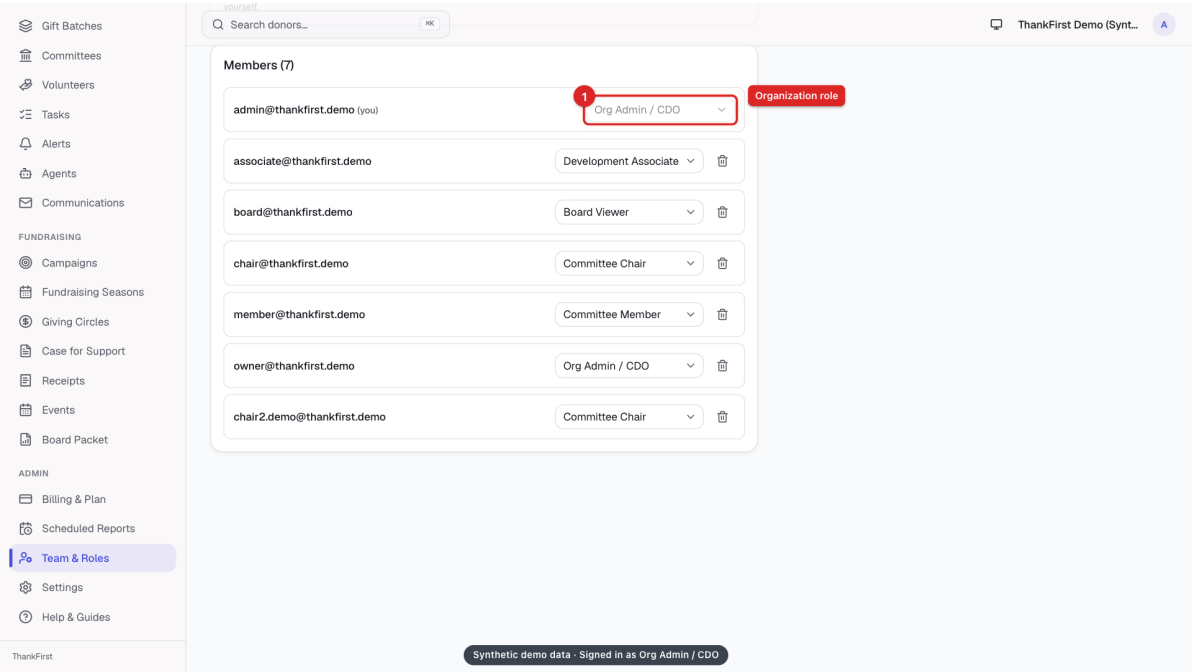
Video chapter 1 starts at 0:46.

Roles. ThankFirst has two kinds of role. Your organization role decides what you can do everywhere. A committee role is your seat on one committee.

1.1 See organization roles

Goal: Find each person's organization role. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Team & Roles**.
   – You'll know you're there: The heading says **Team & Roles**.
   – You'll know you're there: Each member row has a role dropdown.



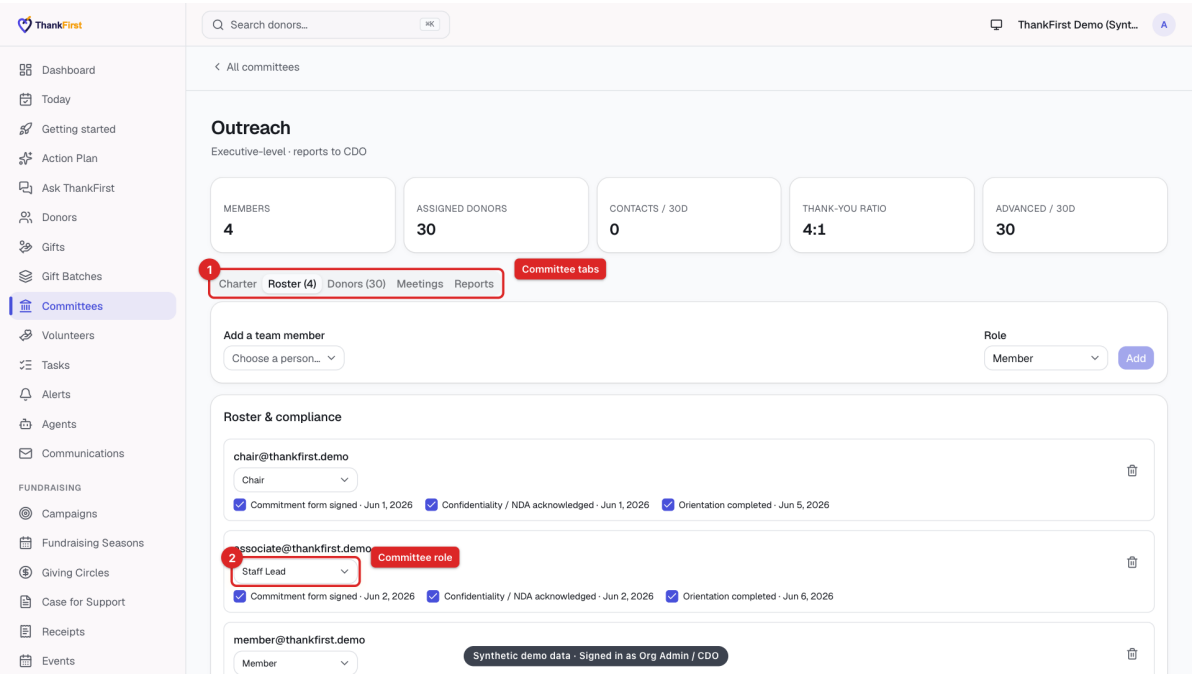
W01-1: Organization role

1.2 See a committee role

Goal: Find a person's seat on a committee. **Role needed:** Org Admin or Development Associate. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Committees**.
   – You'll know you're there: The heading says **Committees**.
3. Click the **Outreach** committee.
   – You'll know you're there: The heading shows the committee's name.

4. Click the **Roster** tab.
   - Check: The Roster lists each person with their committee role.
   - You'll know you're there: A Committee Member's sidebar shows fewer items.



W01-2: Committee tabs Committee role

1.3 Recap: where to find it

- **Organization roles:** Dashboard › Team & Roles (Admin section)
- **Committee roles:** Dashboard › Committees › a committee › Roster tab

1.4 More about this topic

ThankFirst has **two separate kinds of role**:

- **Organization roles** decide what you can do across your whole organization.
- **Committee roles** describe your position on one committee, and only matter inside that committee.

Organization roles

Your Org Admin assigns your organization role in **Team & Roles**.

Role (on-screen label)	Home page	In short
Org Admin / CDO	Today	Full access: settings, billing, team, merge and bulk updates, data export
Development Associate	Today	Everyday staff: works all donors, gifts, tasks, programs; no admin settings
Committee Chair	Today ("My donors · Today")	Volunteer leader: works donors in scope; no adding or importing donors
Committee Member	Today ("My donors · Today")	Volunteer: works only donors assigned to them
Board Viewer	Dashboard ("Board Dashboard")	Read-only: aggregate metrics and the Board Packet

Committee roles

Committee roles are set on a committee's **Roster** tab: **Chair**, **Board Liaison**, **Staff Lead** and **Member**.

- **A committee role does not change your organization role,** and the reverse is also true. For example, a Development Associate can be the **Staff Lead** of a committee.
- **Which donors you see** depends on both kinds of role:
  - You always see donors assigned to you personally.
  - If you are the **Chair** of a committee (the committee role), you also see donors assigned to that committee as a whole.
- **Staff roles see every donor.** Org Admin, Development Associate and Board Viewer see all donors, read-only for Board Viewers.
- **Who sees which donors:** donor access follows the **committee** role. A committee's **Chair** sees every donor assigned to that committee: the donors assigned to them, the committee-wide donors, and those assigned to other members (30 of 30 in the demo). Someone whose organization role is **Committee Chair** but who sits on a committee as **Member** sees only donors assigned to them personally (0 in the demo, shown as **No donors yet**).

What each organization role can do

Area	Org Admin	Dev Associate	Committee Chair	Committee Member	Board Viewer
Donors (list, profile)	all	all	in scope	assigned only	all, read-only
Add or import donors	✓	✓	—	—	—
Merge duplicates, bulk edit, auto-tier	✓	— (can **Flag duplicate**)	—	—	—
Action Plan, Gift Batches, Volunteers, Fundraising Seasons	✓	✓	—	—	—
Receipts, Events, Board Packet	✓	✓	✓	—	✓
Communications	✓	✓	page only, not in menu	—	page only, not in menu
Team & Roles, Settings, Billing, Scheduled Reports	✓	—	—	—	—
Share a saved view with the team	✓	—	—	—	—

2. First sign-in

Video chapter 2 starts at 2:42.

First sign-in. You'll accept your invitation, then protect your account with two-factor sign-in.

2.1 Accept your invitation

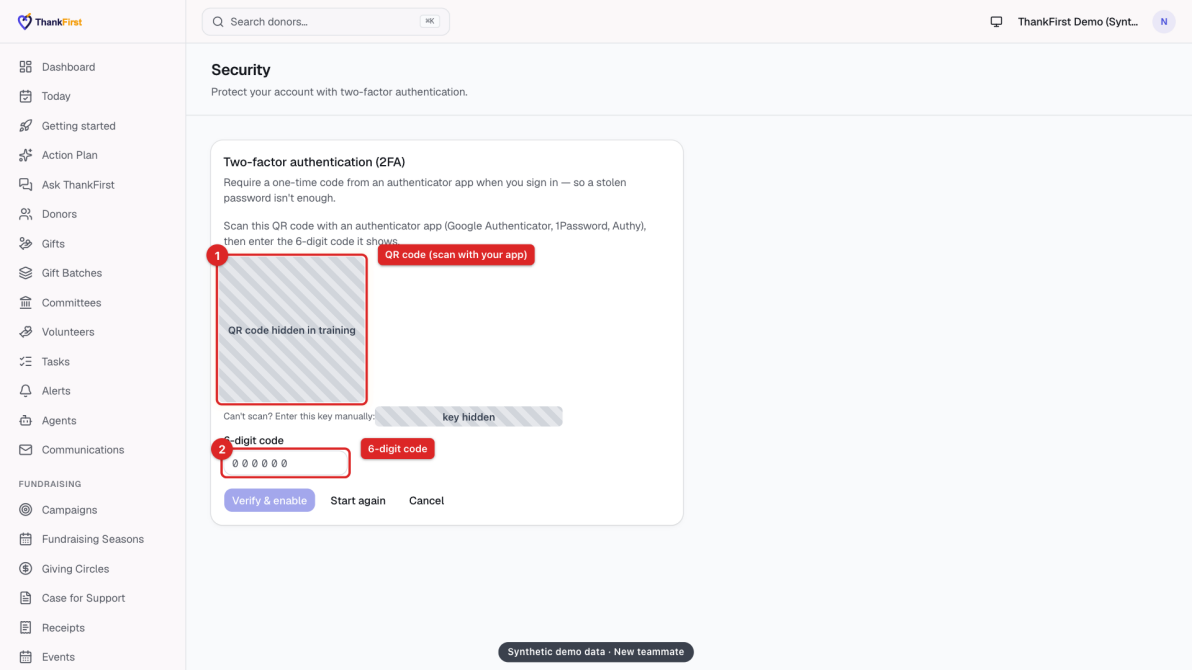
Goal: Join your organization in ThankFirst. **Role needed:** Anyone invited by an Org Admin. **Starts from:** the invitation link your admin sends you.

1. Open the **invitation link** your admin sent you.
   - You'll know you're there: The page names the organization and your role.
2. Click **Sign up**. (If you already have a ThankFirst account, click **Log in**.)
3. In **Email**, type the address the invitation was sent to.
4. In **Password**, type a new password.
5. Click **Sign up**.
6. Click **Accept invitation**.
   - Check: The message says **Invitation accepted. Welcome!** and your home page, **Today**, opens.

2.2 Turn on two-factor sign-in

Goal: Protect your account with an authenticator app. **Role needed:** Everyone. **Starts from:** the Dashboard. **You'll need:** an authenticator app on your phone.

1. Open **Security**: Org Admins go to **Settings › Security**; staff open the address **/app/settings/security** (there's no menu link for staff).
   - You'll know you're there: The heading says **Security**.
   - **Caution:** ⚠ Staff don't have a menu link to Security; type the address shown in step 1.
2. Click **Enable 2FA**.
   - You'll know you're there: A QR code and a setup key appear.
3. Type the **6-digit code** from your app, then click **Verify & enable**.
   - Check: From then on, ThankFirst asks for a fresh code each time you sign in.
   - **Caution:** ⚠ If signing in afterwards doesn't ask for your code, see the appendix (known limitations, item 2).



W02-1: QR code (scan with your app) 6-digit code

2.3 Recap: where to find it

- **Join:** Invitation link › Sign up (or Log in) › Accept invitation
- **Two-factor:** Security › Enable 2FA › scan › 6-digit code › Verify & enable

2.4 More about this topic

Accept an invitation (new team member)

Who: anyone invited by an Org Admin.

1. Open the invitation link you received.
2. Check the page reads **You've been invited as {role}**.
3. Sign in, or create an account, **using the invited email address**.
4. Click **Accept invitation**.
   - You should see **Invitation accepted. Welcome!**
   - You then land on your home page (chapter 1.1).

Common problems:

- **"You're signed in as X, but this invite is for Y."** Sign out, then sign in with the invited address.
- **"This invitation has expired."** Ask your admin to send a new one.
- **"…has already been accepted."** Just sign in at the login page.

Note: invitations are shared as a **link**. The admin copies it from Team & Roles (chapter 28); this screen doesn't send an email.

Two-factor authentication

Who: everyone (your own account).

To turn it on yourself:

1. Go to **Settings** → **Security** (the **Security** tile), and click **Enable 2FA**.
2. Scan the QR code with an authenticator app (for example Google Authenticator, 1Password or Authy), or type the key shown under it. **Never share the QR code or key.**
3. Enter the **6-digit code** from the app and click **Verify & enable**. The page then reads **Two-factor authentication is on.**

When you'll be asked: if your organization requires two-factor authentication, or you've set it up yourself, a screen asks you to add an authenticator app, or for the 6-digit code.

> **Caution:** ⚠ **Check two-factor sign-in first:** before you require two-factor for your team, have one person turn it on, sign out and sign back in to confirm the code prompt appears. If sign-in shows only **Continue to ThankFirst** and returns to the same page, contact ThankFirst support.

Creating a new organization (first admin only)

1. Sign up at **Start free trial** (or `/signup`).
2. On **Let's set up your organization. You'll be the Org Admin (CDO).**, enter the **Organization name**. You can optionally enter a **Platform name shown to your team**.
3. Submit the form. You should see **Organization created.** and land on **Getting started** (chapter 4).

3. Finding your way around

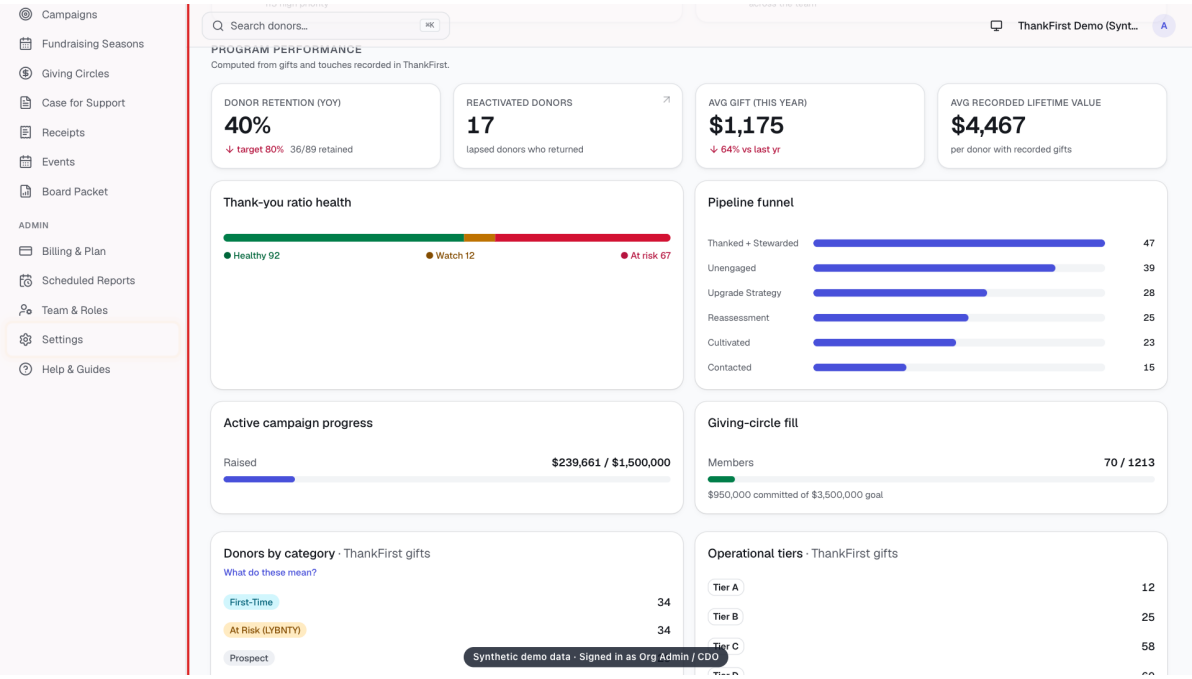
Video chapter 3 starts at 4:40.

Finding your way around: the sidebar, search, and the user menu.

3.1 Use the sidebar

Goal: Know where each area lives. **Role needed:** Everyone. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
   – You'll know you're there: Admins see an **Admin** section at the bottom of the sidebar.



W03-1: Sidebar: only what your role can use

3.2 Jump to a donor with search

Goal: Open any donor's profile quickly. **Role needed:** Everyone. **Starts from:** the Dashboard.

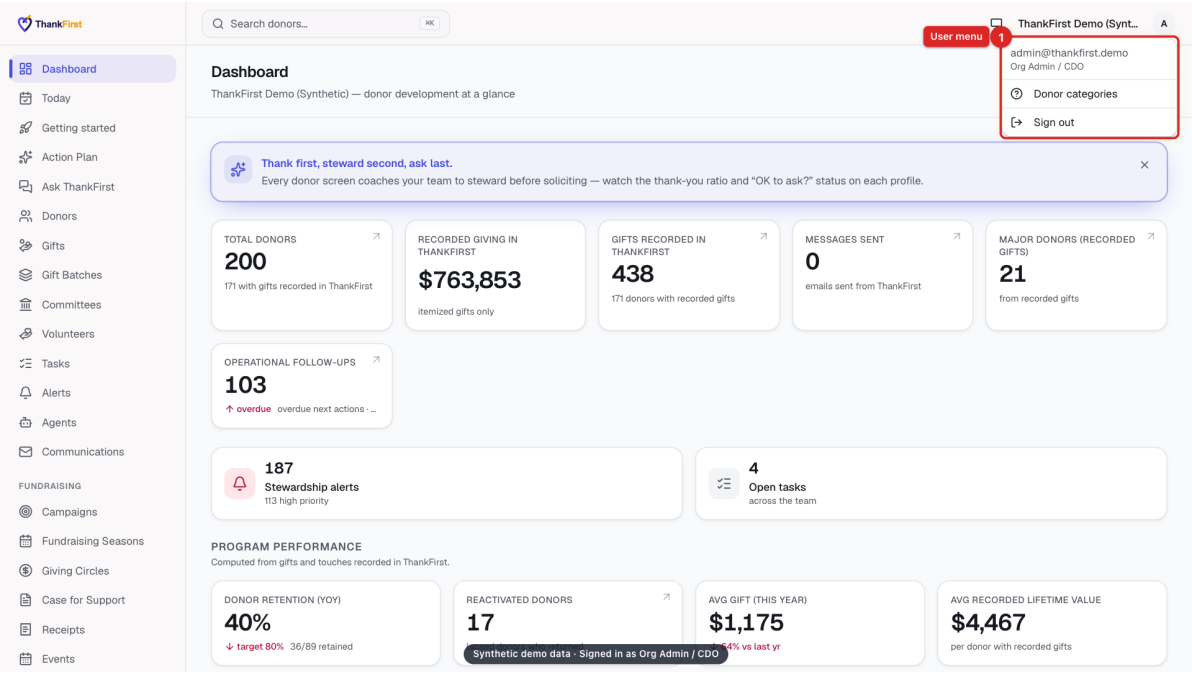
1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. Click **Search donors…** at the top (or press ⌘**K** / **Ctrl K**).
3. Type part of the donor's name.
4. Press **Enter**, or click the match.
   – Check: The donor's name is the page heading.

3.3 Open the user menu

Goal: Find donor categories and sign out. **Role needed:** Everyone. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.

   – You'll know you're there: The heading at the top says **Dashboard**.
2. Click your **initial** in the top right corner.
   – You'll know you're there: The menu shows your email and role.
3. Press **Escape** to close the menu.



W03-2: User menu

3.4 Recap: where to find it

- **Sidebar:** left side of every page
- **Search:** top bar › Search donors… (⌘K) › type › Enter
- **User menu:** your initial, top right › Donor categories / Sign out

3.5 More about this topic

The left sidebar shows only the items your role can use:

- **Main items:** Dashboard, Today, Getting started, Action Plan, Ask ThankFirst, Donors, Gifts, Gift Batches, Committees, Volunteers, Tasks, Alerts, Agents, Communications.
- **FUNDRAISING:** Campaigns, Fundraising Seasons, Giving Circles, Case for Support, Receipts, Events, Board Packet.
- **ADMIN** (Org Admins only): Billing & Plan, Scheduled Reports, Team & Roles, Settings, Help & Guides.

The top bar has:

- **Command palette:** jump to Dashboard, Today, Action Plan, Donors, Committees, Tasks, Alerts, Campaigns, Giving Circles or Case for Support.
- **Theme toggle.**
- **Organization switcher:** shown only if you belong to more than one organization.
- **User menu:**
  – **Donor categories** explains the seven categories.

- **Sign out.**

On a phone, the hamburger button opens the same sidebar.

> **Caution:** ⚠ **Help & Guides** is in the Admin group, so only Org Admins see a link to it. Other roles can use **Donor categories** in the user menu, or ask their admin for the guides.

4. The Getting started checklist

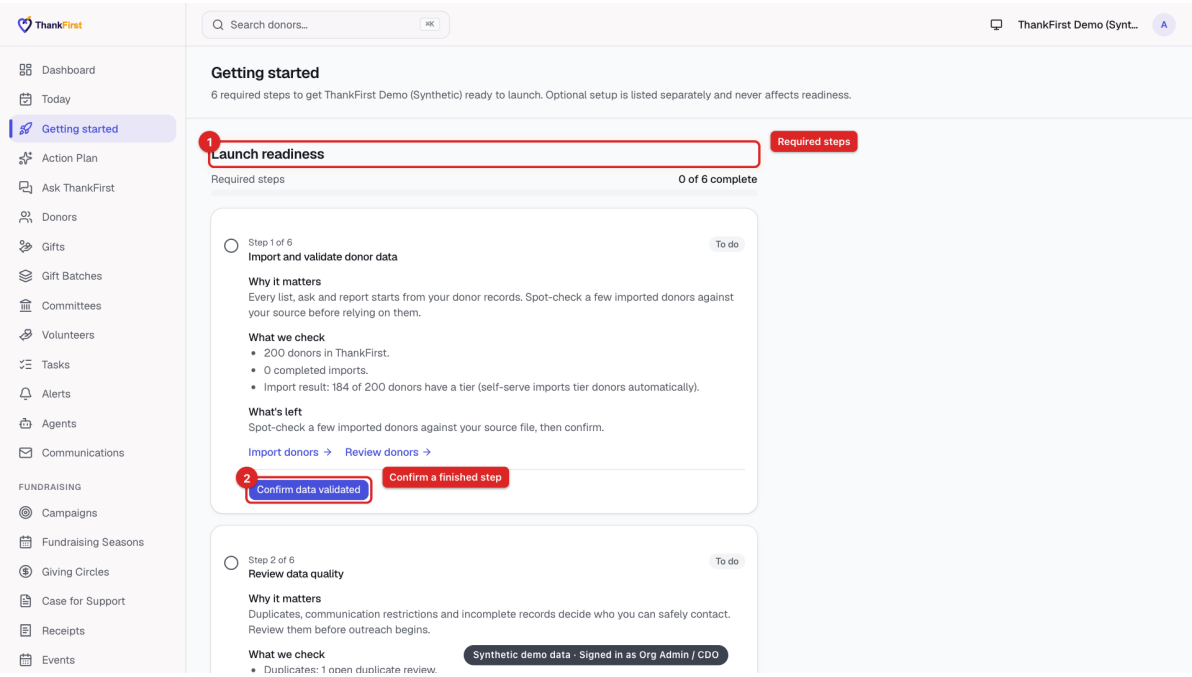
Video chapter 4 starts at 6:29.

The Getting started checklist: your organization's launch steps.

4.1 Confirm a launch step

Goal: Mark a finished launch step as confirmed. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Getting started**.
   – You'll know you're there: The heading says **Getting started**.
3. Click **Confirm data validated** (or the confirm button on the step you finished).
   – Check: The message says **Step confirmed.** and the step shows as confirmed.



W04-1: Required steps Confirm a finished step

4.2 Recap: where to find it

- **Getting started:** Dashboard › Getting started › a step › Confirm

4.3 More about this topic

Who:

- **Org Admin:** confirms or defers steps.
- **Development Associate:** confirms the staff steps.
- **Board Viewer:** read-only ("You can follow readiness here. Staff and admins confirm the steps.").

Where: sidebar → **Getting started**.

Required steps, each with **Why it matters**, **What we check** and **What's left**:

1. **Import and validate donor data**, then click **Confirm data validated**.
2. **Review data quality** (**Duplicate reviews**, **Record hygiene**, **Pending changes**, **Missing contact info**), then click **Confirm review complete**.
3. **Confirm methodology thresholds and organization settings**, then click **Confirm settings**.
4. **Invite or confirm the core staff team**, then click **Confirm core team** (or choose **Solo team for now**).
5. **Assign ownership for the initial priority portfolio**, then click **Confirm portfolio**.
   - It can be deferred with a reason, for example **Waiting for staff to join**.
6. **Review and approve the first 30-day work plan** (**Open tasks**, **Overdue tasks**, **Action Plan**).

Optional setup lists:

- **Items:** payments, committees and volunteers, campaigns, fundraising seasons, AI features, scheduled reports, API and webhooks.
- **Each item shows a status,** such as **Not set up** or **Not connected**, and a **Set up** or **Manage** button.

DAY 2 — DONORS

5. The Donors list

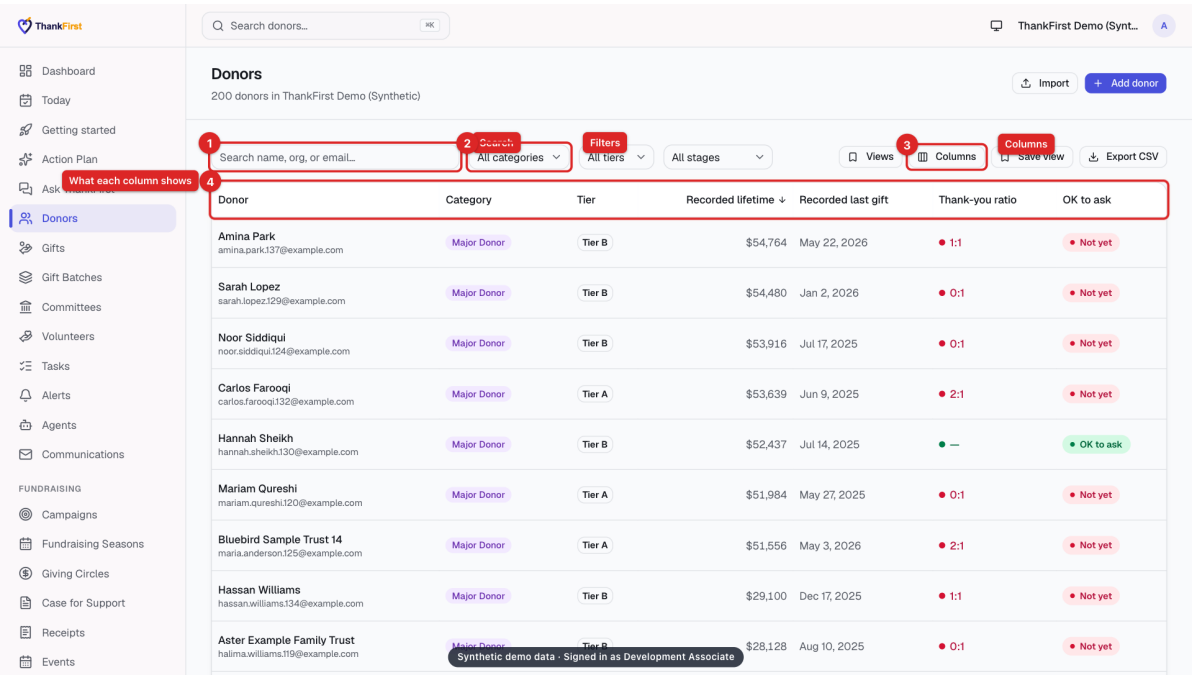
Video chapter 5 starts at 7:38.

The Donors list, where you'll spend a lot of your time.

5.1 Find a donor

Goal: Find one donor in the list. **Role needed:** Development Associate, Org Admin, or a volunteer (assigned donors only). **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. In **Search name, org, or email…**, type part of a name.
   – Check: Only matching donors are listed.



W05-1: Search Filters Columns What each column shows

5.2 Filter the list and choose columns

Goal: Show only the donors you need, with the columns you need. **Role needed:** Everyone with the Donors list. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. Click **All categories**.

4. Choose **At Risk (LYBNTY)**.
   – Check: The filter shows **At Risk** and the list is shorter.
5. Click **Columns**.
6. Tick **Pipeline stage**.
   – Check: A **Pipeline stage** column appears.

5.3 Recap: where to find it

- **Find:** Dashboard › Donors › Search name, org, or email…
- **Filter:** Donors › All categories › At Risk
- **Columns:** Donors › Columns › tick a column

5.4 More about this topic

Who: every role. Committee roles see only the donors in their scope.

Where: sidebar → **Donors**.

Find donors

1. Type in **Search name, org, or email…**
2. Narrow the list with **All categories**, **All tiers**, **All stages** or **All DS Ratings**.
3. Click a row to open the donor profile (chapter 8).

What you'll see:

- **Default columns: Donor**, **Category**, **Tier**, **Recorded lifetime**, **Recorded last gift**, **Thank-you ratio**, **OK to ask**.
- **The OK to ask column** shows **OK to ask** or **Not yet**.

Common mistakes:

- **Forgetting an earlier filter.** If you see **No matches**, clear the search or set the filters back to "All…".
- **"Recorded" values** count only gifts entered in ThankFirst, not history reported by an import (see the Dashboard, chapter 15).

Choose columns

Steps: click **Columns**, then **Show columns**, and tick the columns you want, for example Email, Pipeline stage or Next action.

6. Saved views, exports and scheduled reports

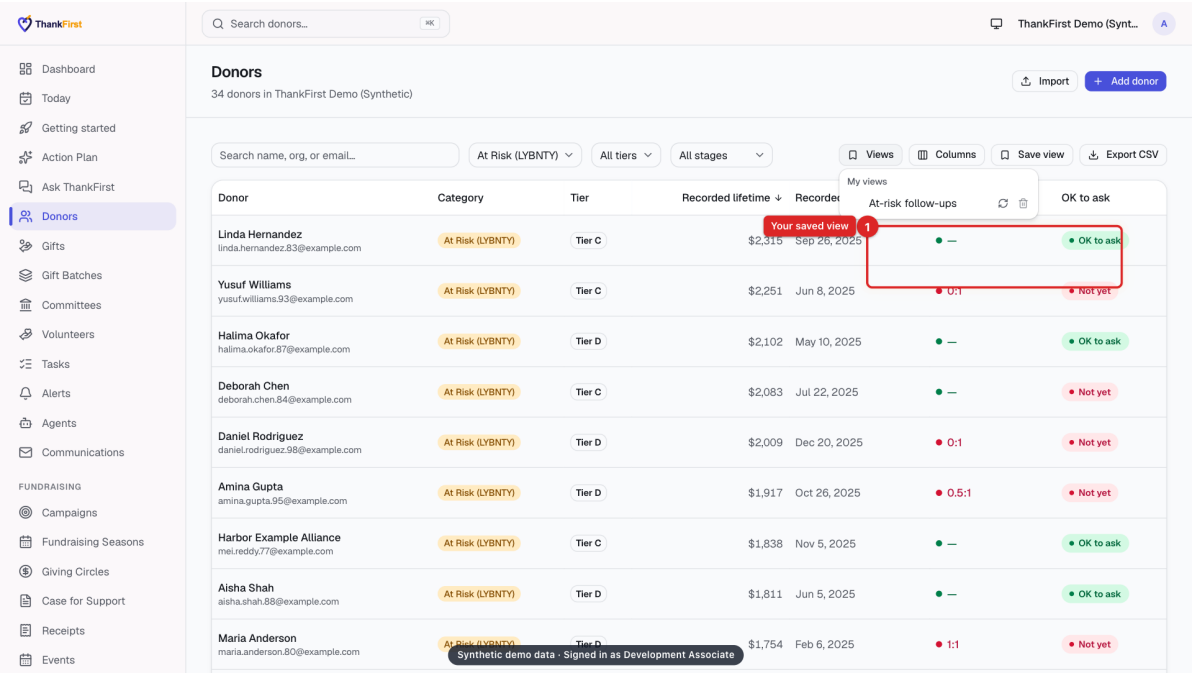
Video chapter 6 starts at 9:34.

Saved views, exports and scheduled reports.

6.1 Save a view

Goal: Come back to a filtered list in one click. **Role needed:** Everyone with the Donors list. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. Set your filters (for example **All categories › At Risk**).
4. Click **Save view**.
5. Type a name, for example **At-risk follow-ups**.
6. Click **Save view** in the window.
7. Check: click **Views**.
   – Check: **At-risk follow-ups** is listed under **My views**.



W06-1: Your saved view

6.2 Export the list

Goal: Download exactly what you see as a CSV file. **Role needed:** Everyone with the Donors list. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.

   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   - You'll know you're there: The heading says **Donors**.
3. Click **Export CSV**. Your browser saves the file.
   - **Caution:** ⚠ Shown, not run in the training (no file is downloaded).

6.3 Find Scheduled Reports

Availability. This feature depends on your organization's setup and plan (email delivery, payments, AI or API access). If it isn't turned on for your organization, you'll see the screens shown here but can't complete the last step. Ask your Org Admin or ThankFirst support to turn it on.

Goal: Email a saved view on a schedule. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Scheduled Reports**.
   - You'll know you're there: The heading says **Scheduled Reports**.
   - **Caution:** ⚠ Delivery needs email and scheduled reports turned on for your organization; they're off in the training video.

6.4 Recap: where to find it

- **Save a view:** Donors › set filters › Save view › name › Save view
- **Export:** Donors › Export CSV
- **Schedule:** Scheduled Reports (Admin section)

6.5 More about this topic

Save a view (all roles that can open Donors or Gifts)

1. Set the filters and columns you want.
2. Click **Save view**.
3. Enter a **View name**, for example "Overdue major donors".
4. Org Admins only: optionally tick **Share with the whole team (admins only)**.
5. Click save. You should see **View saved.**

Using and managing views:

- **To reopen a view:** click **Views**, then choose from **My views** or **Shared with team**.
- **To change a view:** apply new filters, then click **Update to current filters**. You'll see **View updated to current filters.**
- **To remove a view:** click **Delete view**.

If you lack access: a non-admin who ticks Share sees **Only admins can share a view with the whole team.**

Export to CSV

Steps: click **Export CSV** on the Donors or Gifts list. The file includes your current filters and visible columns.

- Exports are audit-logged.
- Committee roles export only the donors they can see.

Scheduled reports (Org Admin)

Where: sidebar → **Scheduled Reports**.

1. Save a view first (6.1).
2. Click **New scheduled report**.
3. Choose **View to send** and **Cadence** (Weekly / Monthly), then the day, the **Hour** and the **Recipients**.
4. Click **Schedule report**. You should see **Report scheduled.**

Managing reports: use **Send now**, **Pause** / **Resume** or **Delete**.

> **Caution:** ⚠ **Conditional:** delivery needs email and scheduled reports turned on for your organization. If they're off, you'll see **No email was sent — email delivery isn't set up for your account yet.**

7. Adding and importing donors

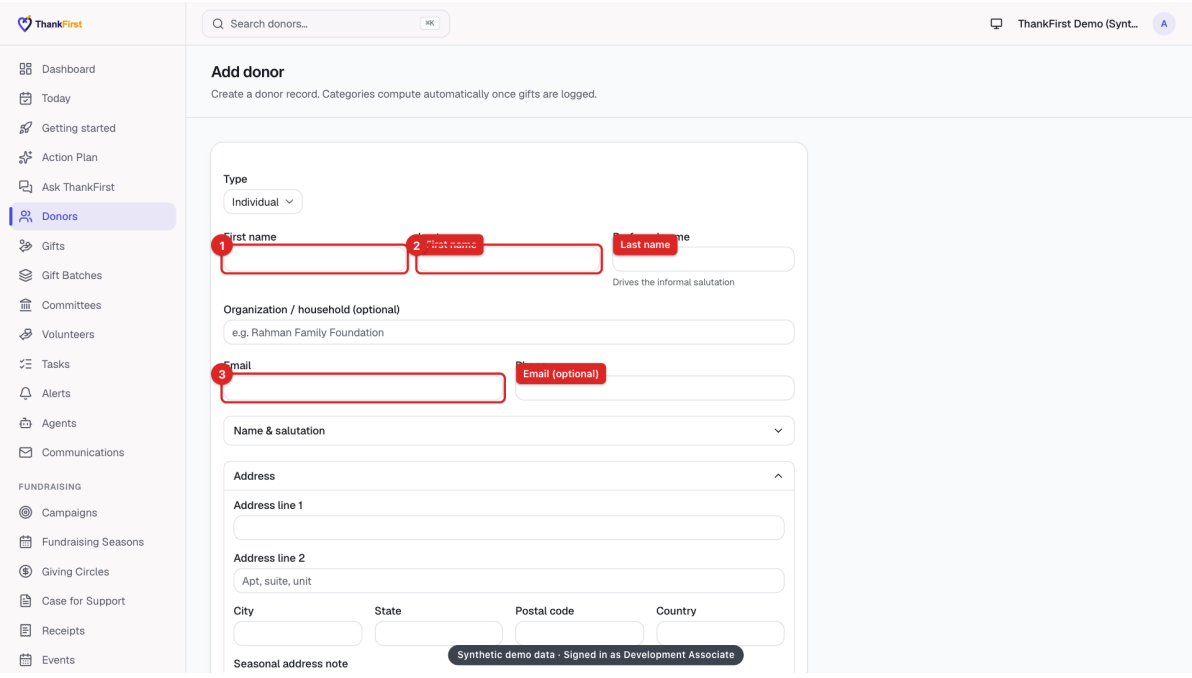
Video chapter 7 starts at 11:45.

Adding and importing donors. In this chapter you'll do two separate tasks. First, add one donor by hand. Then, import many donors from a spreadsheet.

7.1 Add one donor

Goal: Create one new donor record. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors** and **Donors** is highlighted in the sidebar.
3. Click **Add donor** (top right).
4. Required: a **name** or an **organization**. Everything else is optional.
   – You'll know you're there: The heading says **Add donor**.
5. In **First name**, type the first name (example: Jordan).
6. In **Last name**, type the last name (example: Example).
7. Optional: in **Email**, type the email address.
8. Scroll down and click **Add donor**.
   – Check: The message says **Donor added.** and the new profile opens with the donor's name.
9. Check: in the left sidebar, click **Donors**.
10. Search for the name.
    – Check: The new donor appears in the Donors list.

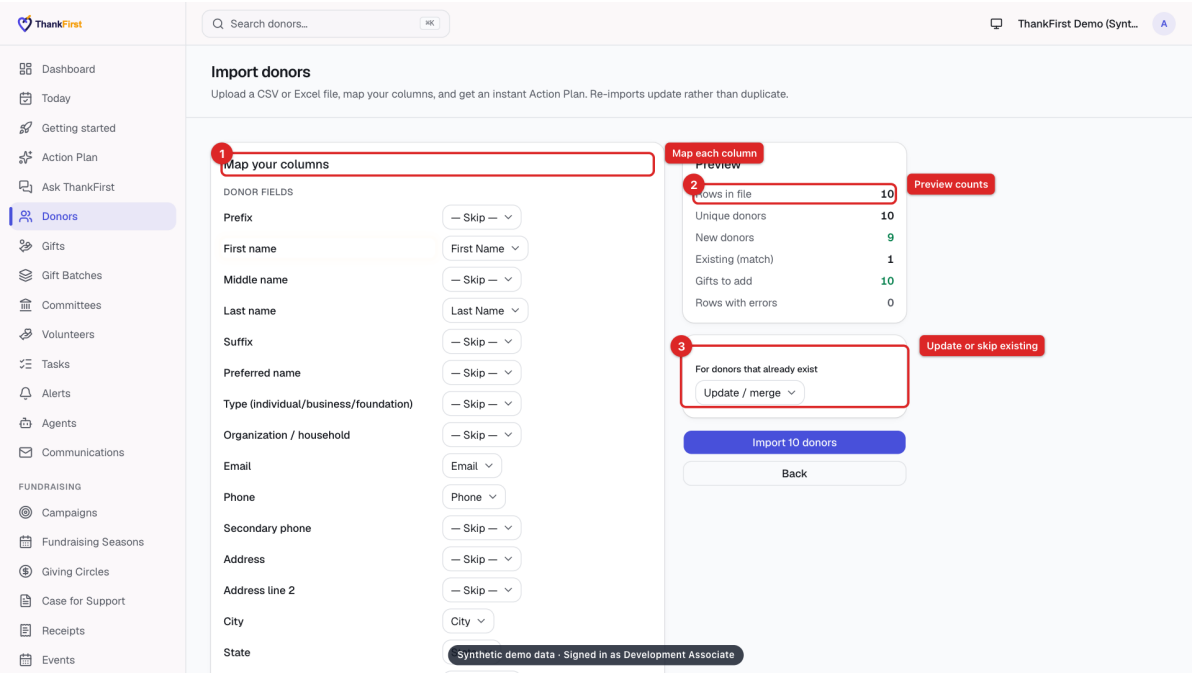


W07-1: First name Last name Email (optional)

7.2 Import donors

Goal: Add many donors at once from a spreadsheet. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard. **You'll need:** a CSV or Excel file with a header row.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
3. Click **Import** (top right, beside Add donor).
   – You'll know you're there: The heading says **Import donors**.
4. Under **Coming from another system?**, click the source box.
5. Choose your old system, or **Generic CSV / spreadsheet**.
6. Click **Choose a CSV or Excel file**.
7. In your computer's file window, choose the file and click **Open**.
8. Check each field's column; leave unneeded ones on **— Skip —**.
   – You'll know you're there: The page shows **Map your columns** and a **Preview** box.
9. Read the **Preview**: rows, new donors, existing matches, errors.
10. Under **For donors that already exist**, keep **Update / merge** (or choose to skip them).
11. Click **Import N donors**.
    – Check: **Import complete** shows donors added, updated and errors; the file appears in **Import history**.
12. Check: click **View donors**.
    – Check: The donor count has gone up by the number of new donors.
    – Check: A donor from the file appears when you search for them.



W07-2: Map each column Preview counts Update or skip existing

7.3 Recap: where to find it

- **Add one donor:** Dashboard › Donors (left sidebar) › Add donor › a name › Add donor › “Donor added”
- **Import donors:** Dashboard › Donors › Import › source › Choose a CSV or Excel file › Preview › Import › “Import complete”
- **Check:** Donors › search for the name

7.4 More about this topic

Who: Org Admin and Development Associate. Other roles are returned to the Donors list.

Add one donor

1. Go to **Donors** and click **Add donor**.
2. Enter at least a name or an organization. Choose the **Type**: Individual, Business or Foundation.
3. Click **Add donor**. You should see **Donor added.**

If you see "Enter a name or an organization.", fill in one of those fields.

Import a file

1. Go to **Donors** and click **Import**. The page "Import donors" opens.
2. Under **Coming from another system?**, pick **Generic CSV / spreadsheet**, **DonorPerfect**, **Bloomerang** or **Little Green Light**.
3. Click **Choose a CSV or Excel file** and select your file.
4. **Map your columns:** set **Donor fields** and, optionally, **Gift fields**. Set any column you don't want to **— Skip —**.
5. **Preview:**
   - Check the counts: rows in file, new donors, existing matches, gifts to add and **Rows with errors**.
   - Under **For donors that already exist**, choose **Update / merge** or **Skip (leave untouched)**.
6. Click **Import N donors**.
7. When you see **Import complete**, review the counts. Download the **Error file** if any rows failed, then click **View donors**.

Good to know:

- Re-importing a file updates existing donors instead of duplicating them.
- Imported history does **not** create thank-you or follow-up work on Today.
- Adding donors beyond your plan's limit is refused with a donor-limit message.

8. The donor profile

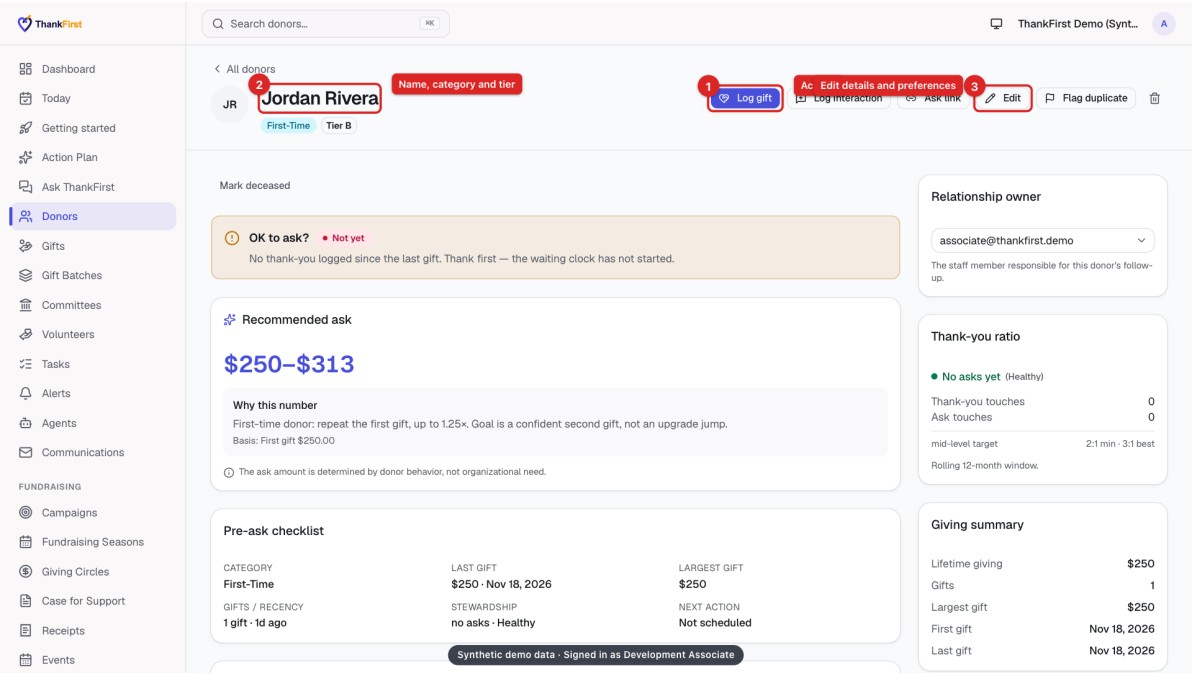
Video chapter 8 starts at 17:33.

The donor profile, which brings everything about one person together.

8.1 Read a donor's profile

Goal: Know where everything is on a profile. **Role needed:** Development Associate, Org Admin, or a volunteer (assigned donors). **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. In **Search name, org, or email…**, type **Jordan Rivera**.
4. Click **Jordan Rivera**.
   – You'll know you're there: The heading is the donor's name.



W08-1: Actions Name, category and tier Edit details and preferences

8.2 Change the pipeline stage

Goal: Record where the donor is in your process. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

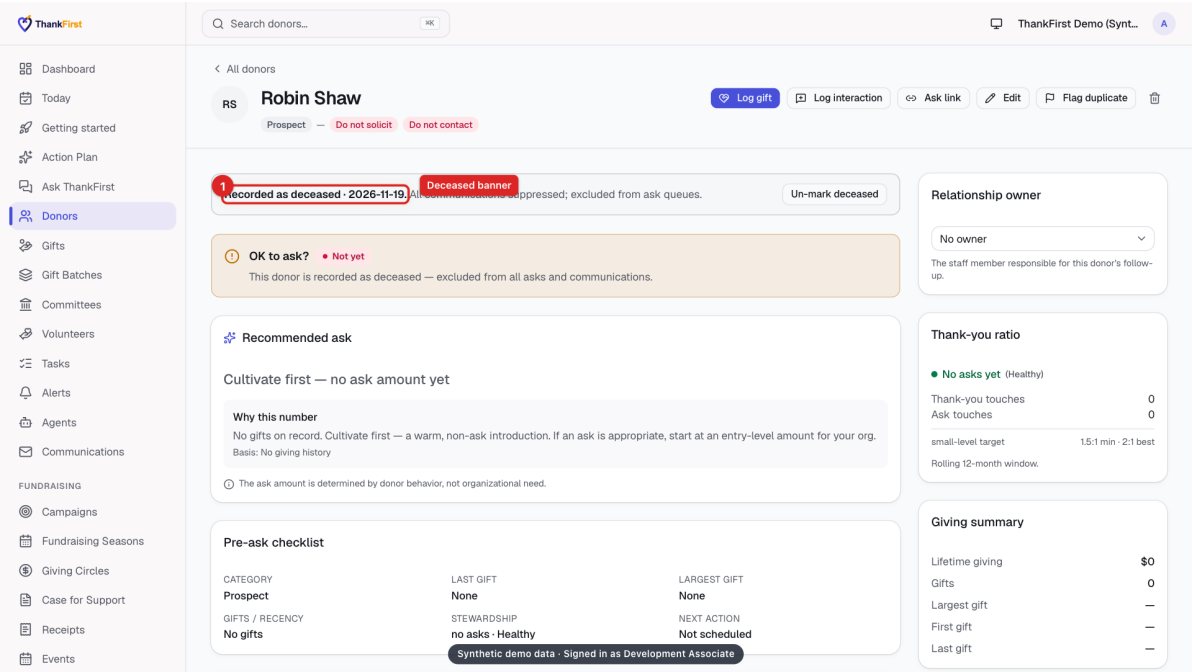
1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.

3. In **Search name, org, or email…**, type **Jordan Rivera**.
4. Click **Jordan Rivera**.
   – You'll know you're there: The heading is the donor's name.
5. On the right, click the **pipeline stage** box (for example **Unengaged**).
6. Choose the new stage, for example **Identified**.
   – Check: The message says **Pipeline stage updated.** and the box shows the new stage.

8.3 Mark a donor as deceased

Goal: Stop all communications to a donor who has died. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. In **Search name, org, or email…**, type **Robin Shaw**.
4. Click **Robin Shaw**.
   – You'll know you're there: The heading is the donor's name.
5. Click **Mark deceased**.
6. Click **Mark deceased** in the window to confirm.
   – Check: The message says **Marked as deceased. Communications suppressed.** and a banner appears.
7. To undo, click **Un-mark**.
   – Check: The message says **Un-marked…** and the banner is gone.



W08-2: Deceased banner

8.4 Recap: where to find it

- **Open:** Dashboard › Donors › search › name
- **Stage:** profile › pipeline stage box › choose
- **Deceased:** profile › Mark deceased › confirm (Un-mark to undo)

8.5 More about this topic

Who: everyone who can see the donor.

- Board Viewers are read-only.
- Committee Members don't see the capacity rating.

Tour of the profile

- **Header: Log gift**, **Log interaction**, **Ask link**, **Edit**, **Merge duplicate** (Org Admin) or **Flag duplicate**, and delete.
- **Main column:**
  - **OK to ask?** banner and recommended ask (**Why this number**);
  - **Pre-ask checklist**;
  - **Giving history**;
  - **Tax receipts & statements**;
  - **Attachments**;
  - **Household**;
  - **Relationships**;
  - **Interaction timeline**.
- **Sidebar: Thank-you ratio**, **Giving summary**, **Volunteering**, **Pipeline & next action**, **Communicate**, **Contact**.

Edit details and contact preferences

1. Click **Edit**.
2. Change the fields you need. The collapsible sections are **Name & salutation**, **Address**, **Additional contact**, **Bio & source**, **Contact preferences** and **Custom fields**.
3. Click **Save changes**. You should see **Donor updated.**

Contact preferences: Do not email / call / mail / text, or **Do not contact at all**. These are respected by Communications (chapter 24).

Pipeline stage, next action and relationship owner

- **Stage:**
  - Use the stage selector in **Pipeline & next action**. The change applies as soon as you choose a stage; you'll see **Pipeline stage updated.** The small **Save** button next to it is for the **Next action date**.
  - The stages are Unengaged, Identified, Committee Assignment, Contacted, Cultivated, Solicited, Gift Received, Thanked + Stewarded, Upgrade Strategy and Reassessment.
- **Next action:** set a **Next action date**. You'll see **Next action date set.**
- **Relationship owner:** choose an owner. You'll see **Owner saved.**

There is no separate pipeline board. Use the **All stages** filter on Donors.

Attachments

1. In **Attachments**, click **Upload** and choose a file: PDF, Office document or image, up to 25 MB.
2. You should see **File attached.**

Good to know: downloads are logged, and download links expire after 60 seconds.

Mark a donor as deceased

1. Click **Mark deceased**.
2. Optionally add a date, then confirm **Mark deceased**.
3. You should see **Marked as deceased. Communications suppressed.**

Undoing it: Un-mark deceased restores the earlier preferences.

Delete a donor

Steps: click the trash icon, then confirm **Delete**. You should see **Donor deleted.**

> **Caution:** ⚠ **This is permanent:** it removes all of the donor's gifts and interactions. Prefer merging (chapter 11) if the record is a duplicate.

9. Logging gifts, interactions and asks

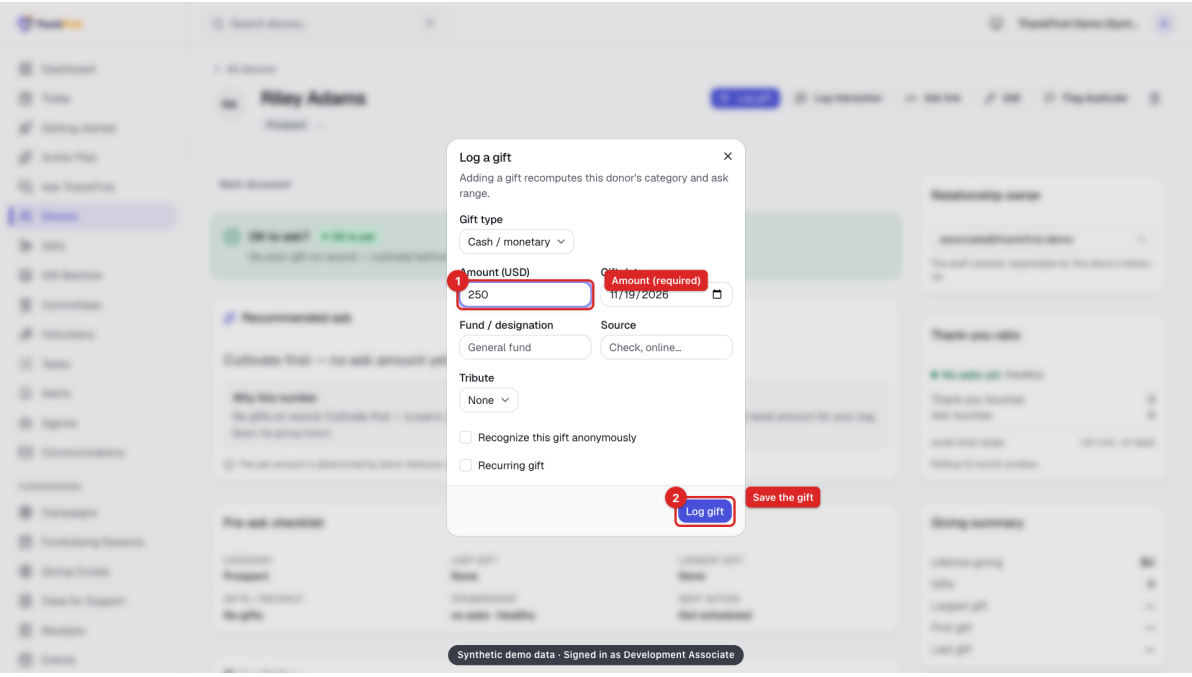
Video chapter 9 starts at 20:37.

Logging gifts, interactions and asks. Every record keeps ThankFirst's advice accurate.

9.1 Log a gift

Goal: Record a gift on a donor's profile. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. In **Search name, org, or email…**, type **Riley Adams**.
4. Click **Riley Adams**.
   – You'll know you're there: The heading is the donor's name.
5. Click **Log gift**.
6. In **Amount**, type the gift amount (required). Check the type and date.
7. Optional: fund and **Source**.
8. Click **Log gift** in the window.
   – Check: The message says **Gift logged.** and the gift appears in the giving history.



W09-1: Amount (required) Save the gift

9.2 Log a thank-you

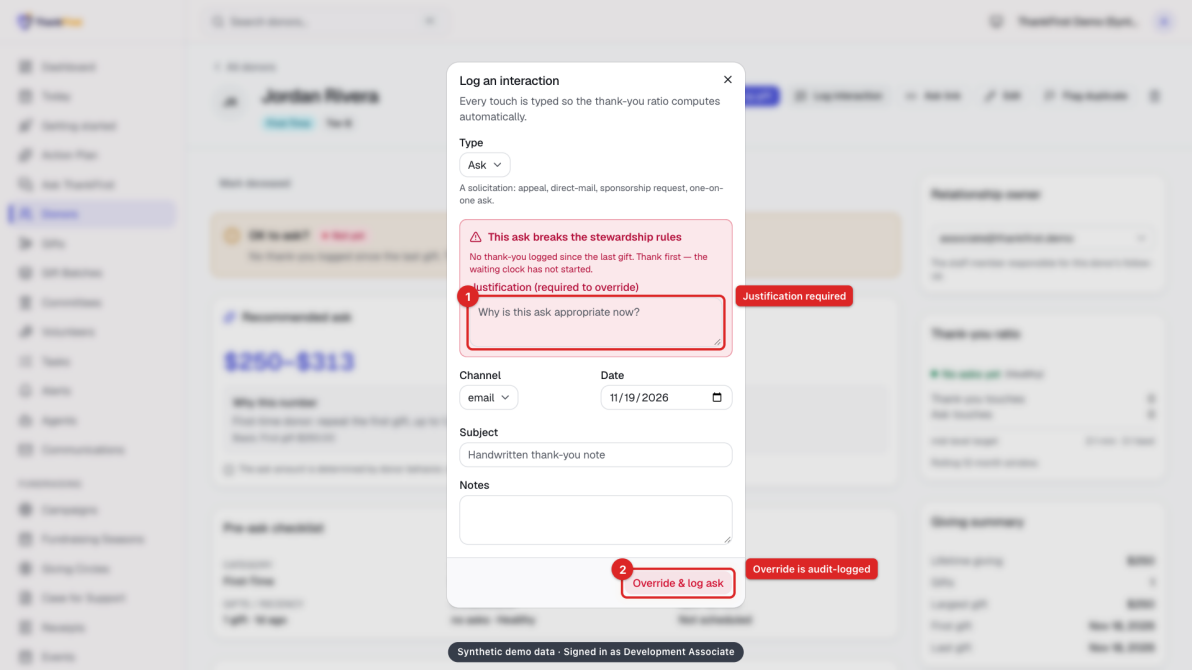
Goal: Record a thank-you, which feeds the thank-you ratio. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. In **Search name, org, or email…**, type **Riley Adams**.
4. Click **Riley Adams**.
   – You'll know you're there: The heading is the donor's name.
5. Click **Log interaction**.
6. Keep the type **Thank-You**; click the **contact method** box.
7. Choose how you made contact, for example **call**.
8. Optional: add a note.
9. Click **Log interaction** in the window.
   – Check: The message says **Interaction logged.**

9.3 See the ask warning

Goal: Understand why ThankFirst warns before an ask. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. In **Search name, org, or email…**, type **Jordan Rivera**.
4. Click **Jordan Rivera**.
   – You'll know you're there: The heading is the donor's name.
5. Click **Log interaction**.
6. Click the **type** box.
7. Choose **Ask**.
   – Check: A warning appears and the button says **Override & log ask**.
8. Usually: press **Escape**, thank and steward first.



W09-2: Justification required Override is audit-logged

9.4 Recap: where to find it

- **Gift:** Donors › donor › Log gift › Amount › Log gift
- **Thank-you:** donor › Log interaction › contact › Log interaction
- **Ask warning:** Log interaction › type Ask › warning

9.5 More about this topic

Who:

- Staff (Org Admin, Development Associate) can log gifts.
- Committee roles can log interactions for donors in their scope.

Log a gift

1. On the profile, click **Log gift**.
2. Choose the **Gift type**: **Cash / monetary**, **In-kind (goods/services)** or **Pledge installment**.
3. Enter the **Amount (USD)** and the **Gift date**. Optionally set:
   - **Fund / designation**;
   - **Source**;
   - **Tribute**;
   - **Recognize this gift anonymously**;
   - **Recurring gift**.
4. Save. You should see **Gift logged. Category and ask recommendations updated.**

Common errors:

- **"Enter a gift amount."**
- For an in-kind gift: **"Describe the in-kind gift."**

Log an interaction (thank-you, ask or neutral)

1. Click **Log interaction**.
2. Choose the **Type**: Thank-You, Ask or Neutral. Then fill in **Channel**, **Date**, **Subject** and **Notes**.
3. Save. You should see **Interaction logged.**

Stewardship rules: if you choose **Ask** for a donor where it isn't OK to ask yet, the dialog warns you, adds a box asking **Why is this ask appropriate now?**, and the button becomes **Override & log ask**.

- Usually the right move is to close the dialog (**Esc** or the ×) and thank and steward first.
- If you do override, the justification is required and the override is written to the audit log.

Personalized ask link

What it needs: online donations turned on (chapter 32).

Steps: click **Ask link**, then **Create ask link**, then **Copy link**. You should see **Personalized ask link created.**

10. Households and relationships

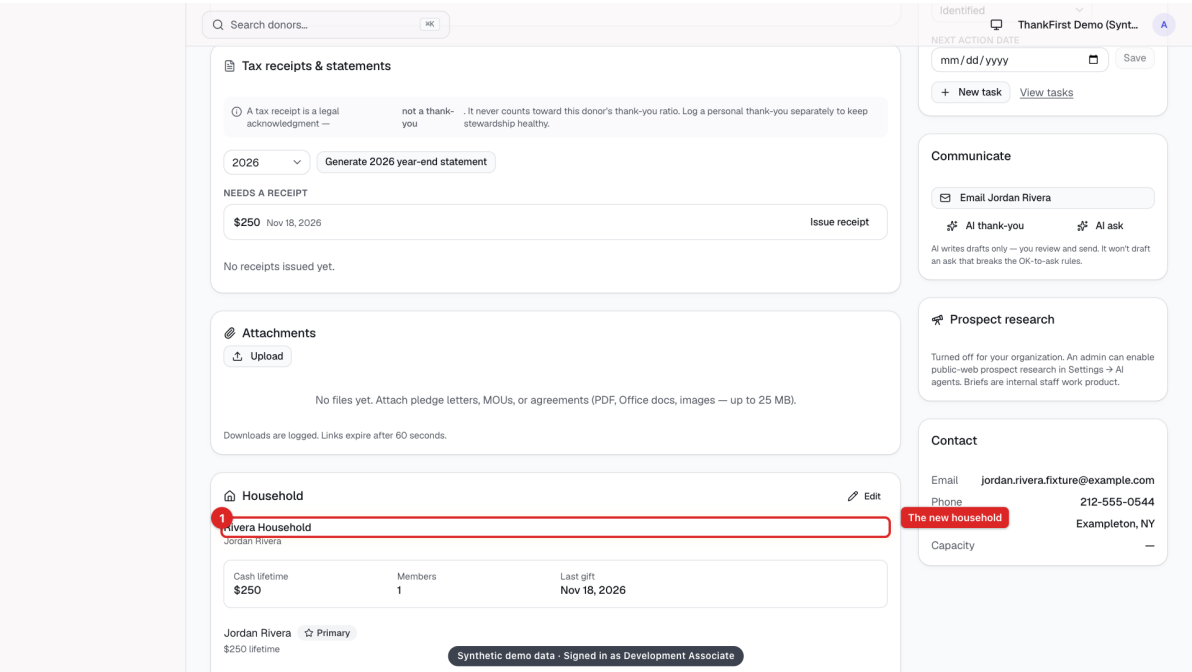
Video chapter 10 starts at 24:01.

Households and relationships.

10.1 Create a household

Goal: Group family members together. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. In **Search name, org, or email…**, type **Jordan Rivera**.
4. Click **Jordan Rivera**.
   – You'll know you're there: The heading is the donor's name.
5. Scroll to **Household** and click **Create household**.
6. Type the household name.
7. Click **Create household** in the window.
   – Check: The **Household** card shows the new household.



W10-1: The new household

10.2 Add a relationship

Goal: Connect a donor to a person or organization. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. In **Search name, org, or email…**, type **Jordan Rivera**.
4. Click **Jordan Rivera**.
   – You'll know you're there: The heading is the donor's name.
5. Scroll to **Relationships** and click **Add relationship**.
6. Choose the **relationship type**.
7. Choose **another donor** or **an external entity**.
8. Type the name.
9. Click **Add relationship** in the window.
   – Check: The message says **Relationship added.** and the relationship is listed.

10.3 Recap: where to find it

- **Household:** Donors › donor › Create household › name › Create household
- **Relationship:** donor › Add relationship › type › who › Add relationship

10.4 More about this topic

Who: staff roles.

Where: the donor profile, in the **Household** and **Relationships** cards.

Households

1. Click **Create household**, enter a **Household name** (for example "Smith Household"), and click **Create household**. You should see **Household created.**
2. Search **Search donors to add…** to add members. You'll see **{name} added to household.**
3. Use **Primary** to set the main contact, or **Remove from household**.
4. To change the name or **Salutation**, use **Edit household**.

Relationships

1. Click **Add relationship**.
2. Choose the **Relationship type**, for example Spouse, Employer or Family foundation.
3. Choose **Related to**: **A donor** or **An external entity**.
4. Click **Add relationship**. You should see **Relationship added.**

11. Duplicates, merging and bulk edits

Video chapter 11 starts at 26:26.

Duplicates, merging and bulk edits.

11.1 Flag a duplicate

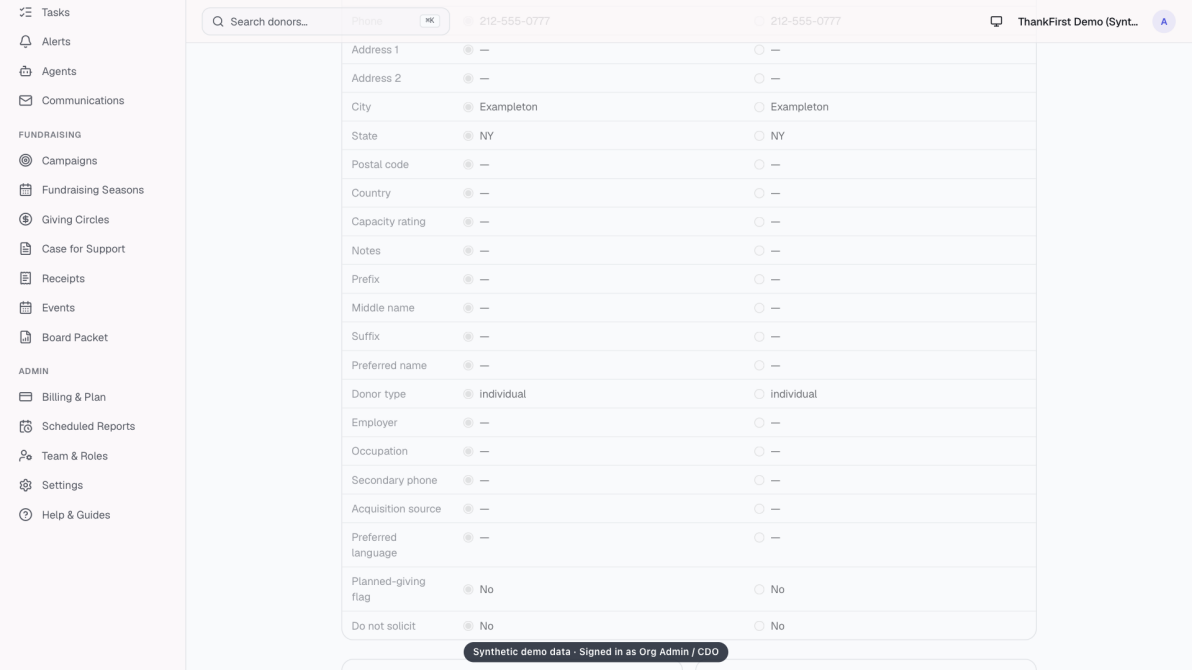
Goal: Ask an admin to merge two records. **Role needed:** Everyone who can open the donor. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   - You'll know you're there: The heading says **Donors**.
3. In **Search name, org, or email…**, type **Alexander Kim**.
4. Click **Alexander Kim**.
   - You'll know you're there: The heading is the donor's name.
5. Click **Flag duplicate**.
6. Search for the other record.
7. Pick the matching record.
   - Check: The message says **Flagged — an admin will review and merge.**

11.2 Merge duplicates

Goal: Combine two records into one. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   - You'll know you're there: The heading says **Donors**.
3. In **Search name, org, or email…**, type **Alex Kim**.
4. Click **Alex Kim**.
   - You'll know you're there: The heading is the donor's name.
5. Click **Merge duplicate**.
6. Search for the other record.
7. Pick it.
8. Choose the **surviving record** and the best value for each field; review what will move.
9. Click **Review & merge**.
10. Type **MERGE** to confirm.
11. Click **Merge**.
    - Check: The message says **Donors merged.** and one profile remains.

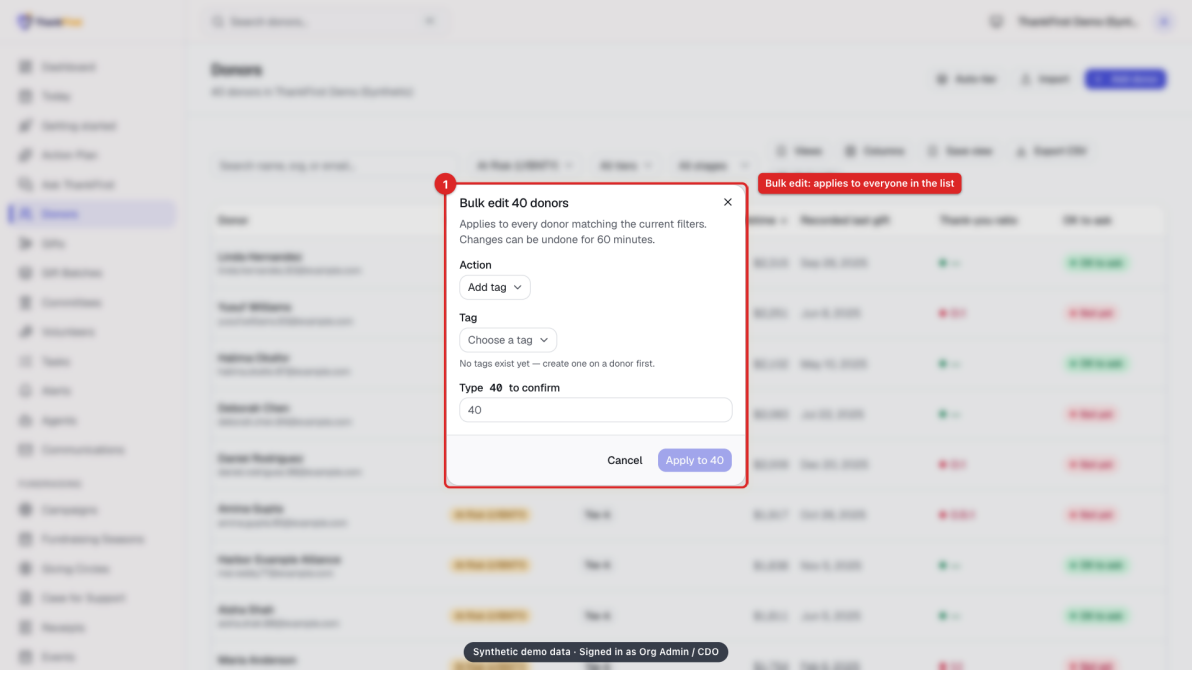


W11-1: Review and merge

11.3 Find bulk edit

Goal: Change many donors at once. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. Filter the list first (bulk edit applies to the filtered donors).
4. Click **Bulk edit**.
   – **Caution:** ⚠ Shown, not applied in the training.



W11-2: Bulk edit: applies to everyone in the list

11.4 Recap: where to find it

- **Flag:** Donors › donor › Flag duplicate › pick the other record
- **Merge (admins):** donor › Merge duplicate › pick › Review & merge › type MERGE
- **Bulk edit (admins):** Donors › filter › Bulk edit

11.5 More about this topic

Flag a possible duplicate (Development Associate)

Steps:

1. On the profile, click **Flag duplicate**. The dialog **Flag a possible duplicate** opens.
2. Search for the record that looks like a duplicate and pick it.
3. Confirm. This creates a duplicate-review task for an admin; it doesn't change any data. You should see **Flagged — an admin will review and merge.**

Merge duplicates (Org Admin)

1. On one of the two records, click **Merge duplicate**.
2. Search for the other record and select it.
3. Choose the **Survivor**. The other record **will be merged away**.
4. Pick a value for each field. Choose the **Primary email**; the other becomes an alias. Then choose the household.
5. Read the preview (gifts, interactions and receipts that will move), then click **Review & merge**.
6. Type **MERGE**, then click **Merge donors**. You should see **Donors merged.**

Caution: ⚠ Merges cannot be undone.

> **Caution:** ⚠ **Note:** the duplicate-review item on **Today** links to the Donors list, not straight to the merge screen. Start merges from the donor profile.

Bulk edit (Org Admin)

1. On Donors, filter to the donors you want to change.
2. Click **Bulk edit**.
3. Choose an action:
   - **Add tag** / **Remove tag**;
   - **Add to committee** / **Remove from committee**;
   - **Set capacity rating**;
   - **Mark deceased**;
   - **Set custom field**.
4. Type the number of donors into **Type N to confirm**, then click **Apply to N**. You should see "{Action} applied to N donors." with **Undo**.

Good to know:

- You can undo for 60 minutes, from **Recent bulk changes**.
- **Auto-tier** (Org Admin) sets tiers by lifetime giving.

DAY 3 — EVERYDAY WORK

12. Today

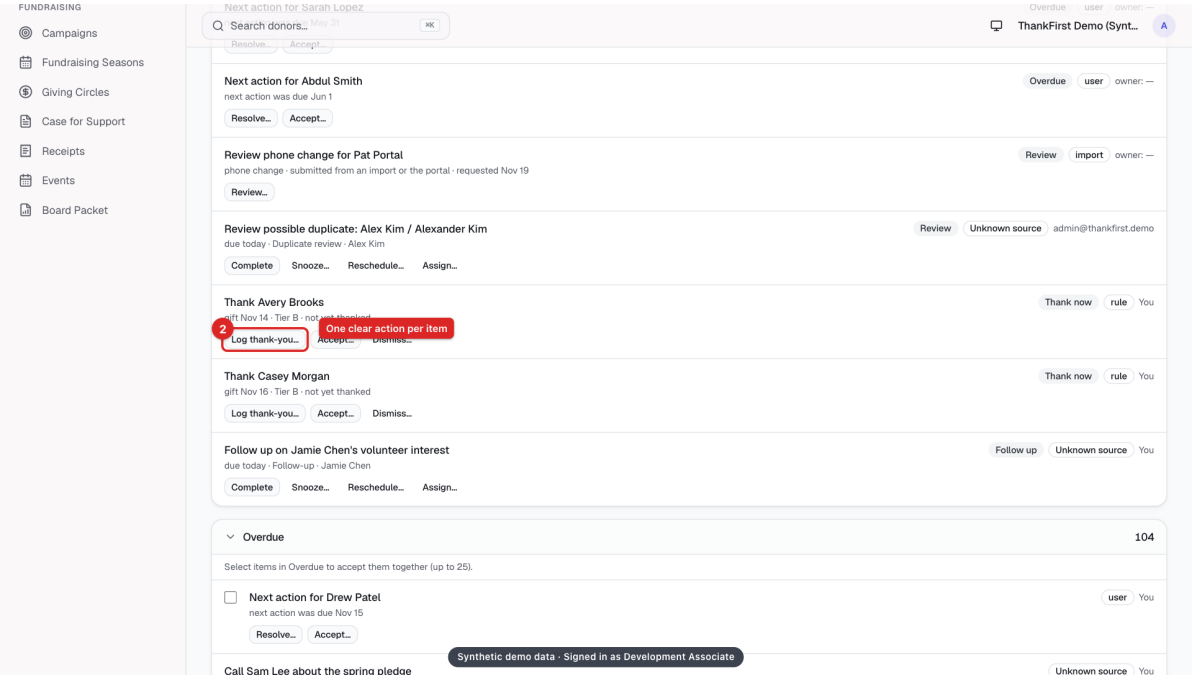
Video chapter 12 starts at 29:32.

Today, your daily workspace.

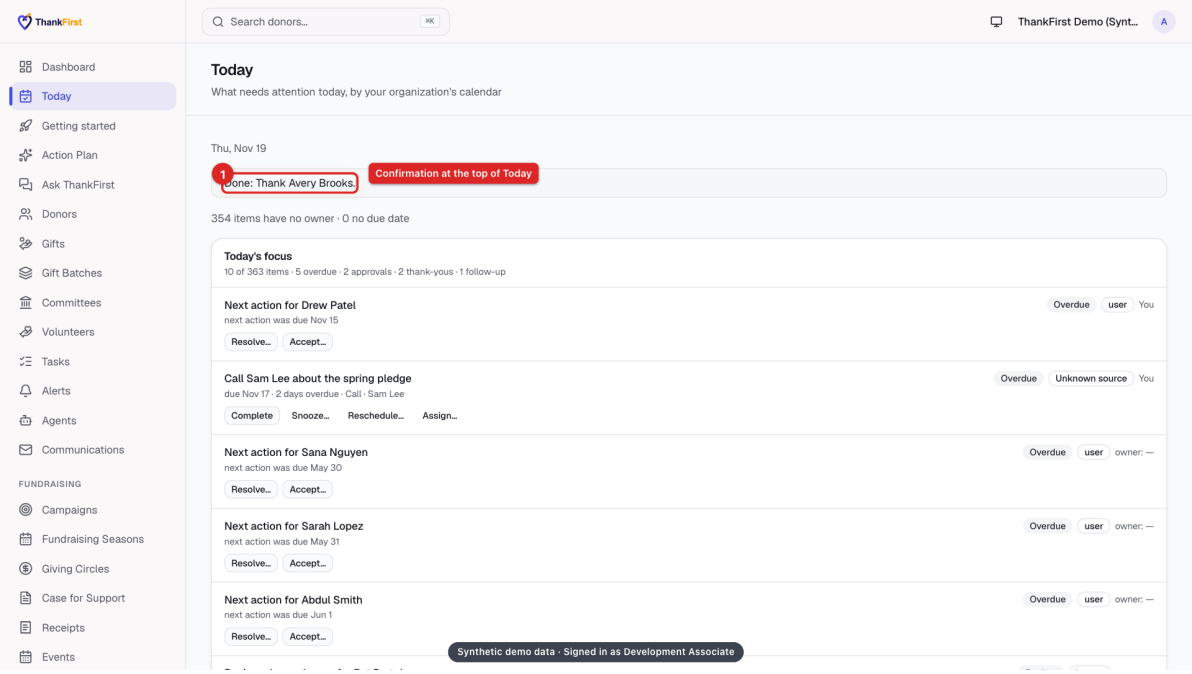
12.1 Log a thank-you

Goal: Thank a donor whose gift is waiting. **Role needed:** Development Associate, Org Admin, or a committee volunteer. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Today**.
   – You'll know you're there: The heading says **Today**.
3. Find an item with **Log thank-you…** (in Today's focus or the **Thank now** group).
4. Click **Log thank-you…** on the item.
5. Choose how you thanked them (for example **Call**).
6. Click **Save**.
   – Check: The status line at the top says **Done: …** and the item leaves **Thank now**.



W12-1: Today's focus One clear action per item



W12-2: Confirmation at the top of Today

12.2 Snooze an item

Goal: Hide an item until a later date. **Role needed:** Development Associate, Org Admin, or a committee volunteer. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Today**.
   – You'll know you're there: The heading says **Today**.
3. Click **Snooze…** on the item.
4. Pick the date it should come back.
5. Click **Snooze**.
   – Check: The status line says **Snoozed until …** with the date.

12.3 Dismiss an item

Goal: Remove an item that doesn't belong. **Role needed:** Development Associate, Org Admin, or a committee volunteer. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Today**.
   – You'll know you're there: The heading says **Today**.
3. Click **Dismiss…** on the item.
4. Choose a **reason** (required).
5. Click **Dismiss**.
   – Check: The status line at the top confirms the dismissal.

12.4 Recap: where to find it

- **Thank-you:** Dashboard › Today › Log thank-you… › How › Save
- **Snooze:** Today › Snooze… › date › Snooze
- **Dismiss:** Today › Dismiss… › reason › Dismiss

12.5 More about this topic

Who:

- Org Admin, Development Associate, Committee Chair and Committee Member.
- Board Viewers are sent to the Dashboard with "Today is for staff and committee members."

Where: sidebar → **Today**. It's also the home page for these roles.

Read your day

- **Sections: Overdue**, **Review and approve**, **Thank now**, **Follow up**, **Relationships going stale**, **Upcoming**, **Unassigned priority donors**.
- **Today's focus** sits at the top.

Act on an item

Button	What it does	Confirmation
Complete / **Log thank-you** / **Log contact**	Records the outcome	"Completed: …"
Snooze…	Hides the item until **Wake on**	"Snoozed until {date}: …"
Reschedule…	New **Due on** date	"Rescheduled to {date}: …"
Assign…	Picks the **Assignee**	"Assigned to {who}: …"
Set owner…	Sets the relationship **Owner**	"Owner set to {who}: …"
Review…	Opens a change to **Approve** or **Reject**	"Approved: …" / "Rejected: …"
Accept…	Turns the item into a task (**Accept as a task**)	"Accepted …"
Dismiss…	Needs a **Reason**; optionally **Only until a date**	"Dismissed: …"

- **Each action shows a confirmation line** above the list, for example **Done: …** or **Snoozed until …**.
- **To accept several items:** use **Select**, then **Accept selected (n)…** (up to 25 at a time).
- **To see what you dismissed:** open **Dismissed (n)**; you can **Undo dismissal** there.

Common messages:

- **"This changed since you opened it."** or **"Someone already resolved this."** Reload the page.
- **"Nothing needs you today."** This is normal. Today fills in as gifts and contacts are recorded; imported history doesn't create work.

13. Tasks

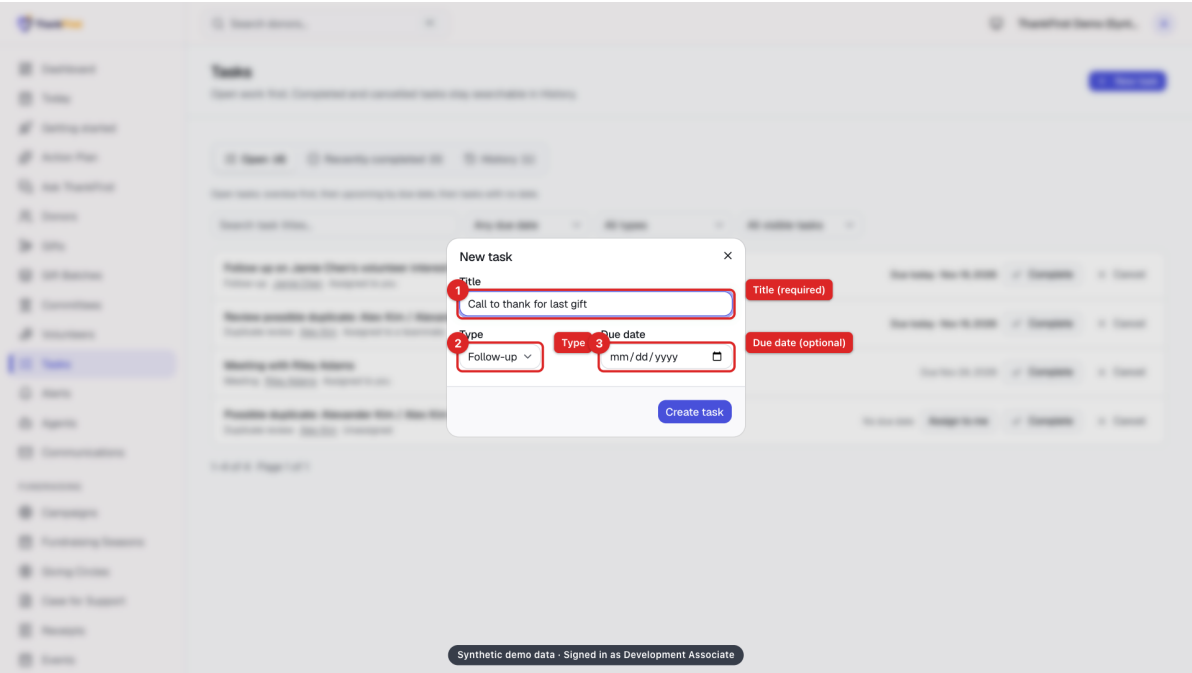
Video chapter 13 starts at 32:03.

Tasks, which hold your follow-ups.

13.1 Create a task

Goal: Add a follow-up with a due date. **Role needed:** Development Associate, Org Admin, or a volunteer. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Tasks**.
   – You'll know you're there: The heading says **Tasks**.
3. Click **New task**.
4. Type a **title** (required).
5. Choose a **type**.
6. Optional: set a **due date**.
7. Click **Create task**.
   – Check: The message says **Task created.** and the task is listed under **Open**.



W13-1: Title (required) Type Due date (optional)

13.2 Complete a task

Goal: Mark finished work as done. **Role needed:** Development Associate, Org Admin, or a volunteer. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.

   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Tasks**.
   - You'll know you're there: The heading says **Tasks**.
3. Click **Any due date**.
4. Choose **Due today**.
5. Click **Complete** on the task.
   - Check: The task moves to **Recently completed**.

13.3 See one donor's tasks

Goal: Show just one donor's work. **Role needed:** Development Associate, Org Admin, or a volunteer. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   - You'll know you're there: The heading says **Donors**.
3. Open the donor.
4. On the profile, click **View tasks**.
   - Check: The Tasks page is filtered to that donor.

13.4 Recap: where to find it

- **Create:** Dashboard › Tasks › New task › title › Create task
- **Complete:** Tasks › Any due date › Complete
- **One donor:** Donors › donor › View tasks

13.5 More about this topic

Who: every role sees **Tasks**. Committee roles see tasks for donors in their scope.

Where: sidebar → **Tasks**. The tabs are **Open**, **Recently completed** and **History**.

Create a task

1. Click **New task**.
2. Enter a **Title**, for example "Call to thank for last gift".
3. Choose the **Type**: Call, Meeting, Thank-you, Cultivation, Solicitation, Follow-up or Other.
4. Optionally set a **Due date**.
5. Click **Create task**. You should see **Task created.**

Work tasks

Action	Confirmation
Complete	**Task completed.**
Cancel	**Task cancelled — it stays in History.**
Reopen	**Task reopened.**
Assign to me	**Task assigned to you.**

Filters:

- **Search task titles…**;
- due date: **Overdue**, **Due today**, **Upcoming**, **No due date**;
- type;
- **Assigned to me**.

Good to know:

- From a donor profile, **View tasks** shows only that donor's tasks.
- Some tasks must be completed from Today so the outcome is recorded. In that case you'll see **Complete this from Today so its outcome is recorded.**

14. Action Plan

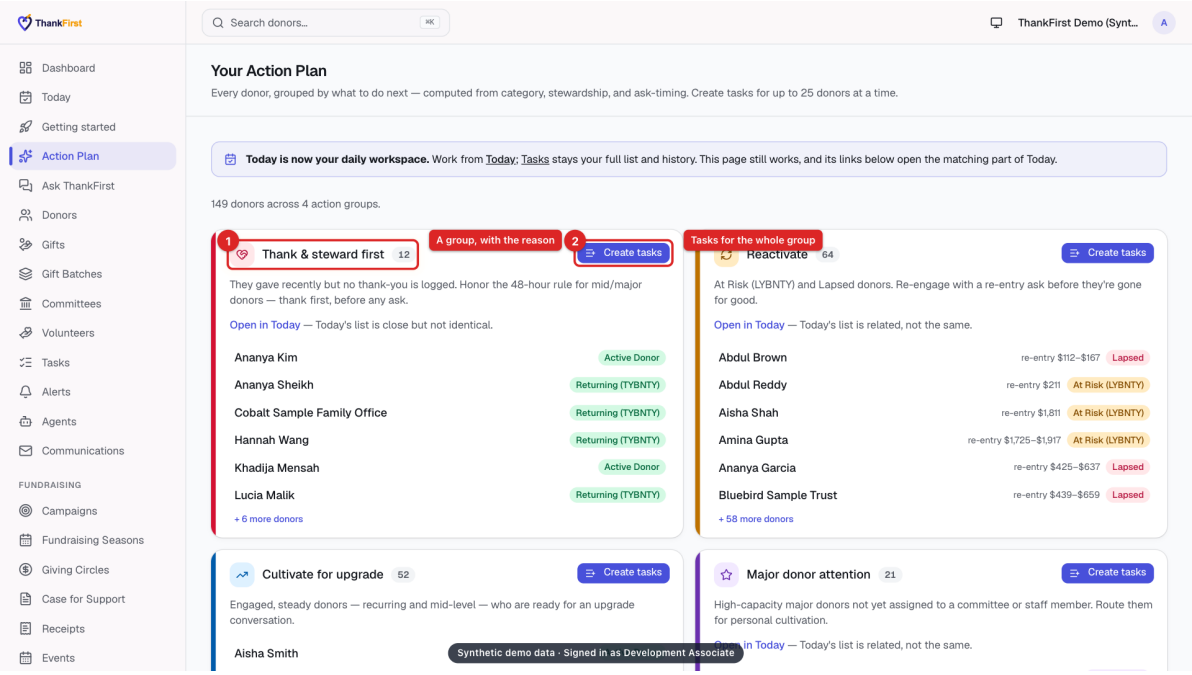
Video chapter 14 starts at 34:11.

The Action Plan groups every donor by what to do next.

14.1 Create tasks for a group

Goal: Turn a group of donors into tasks. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Action Plan**.
   – You'll know you're there: The heading says **Your Action Plan**.
3. Click **Create tasks** on the group.
4. Click **Create N tasks**.
5. Click **Done**.
   – Check: The window shows how many tasks were created.
6. In the left sidebar, click **Tasks**.
   – You'll know you're there: The heading says **Tasks**.



W14-1: A group, with the reason Tasks for the whole group

14.2 Recap: where to find it

- **Action Plan:** Dashboard › Action Plan › Create tasks › Create › Done
- **Check:** Tasks

14.3 More about this topic

Who: Org Admin and Development Associate.

Where: sidebar → **Action Plan**.

1. Review the groups:
   - **Thank & steward first**;
   - **Warm volunteer prospects**;
   - **Reactivate**;
   - **Cultivate for upgrade**;
   - **Major donor attention**.

   Each group has a "why" line.
2. Click **Create tasks** on a group.
3. Check the rule line and the list **Donors who will get a task**, then click **Create N tasks**.
4. Read the result, for example "N tasks created · X already had active work", then click **Done**.

Good to know: you can create tasks for up to 25 donors at a time. **Open in Today** shows the matching Today items.

15. Dashboard and Alerts

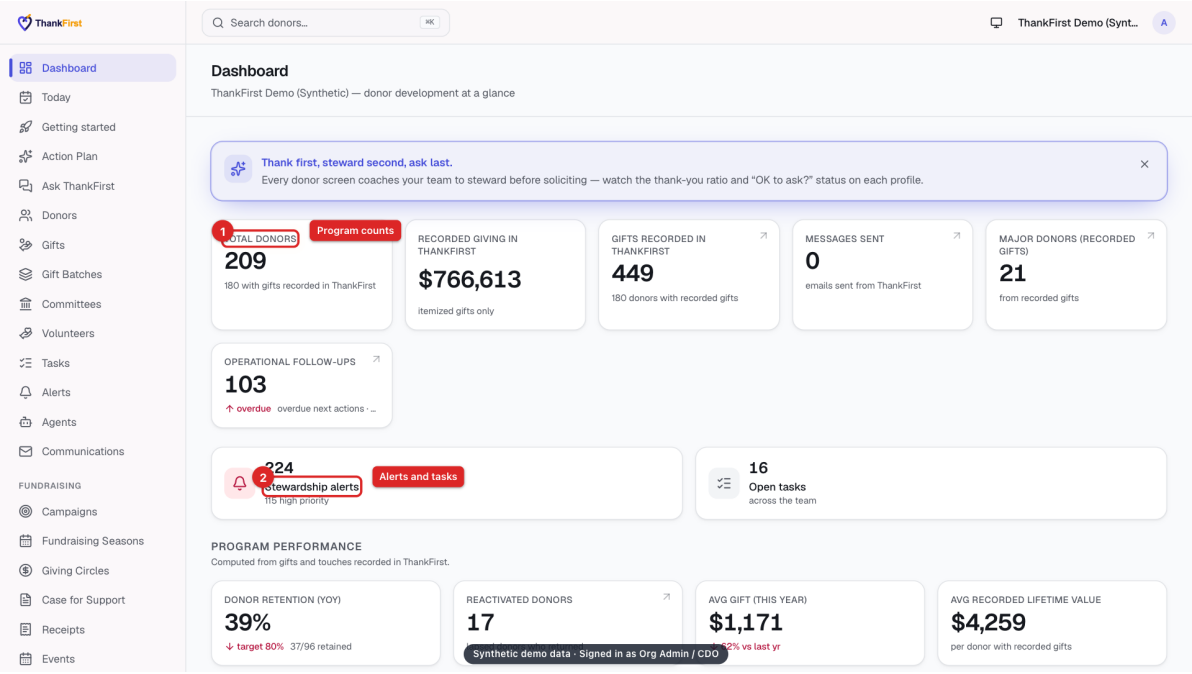
Video chapter 15 starts at 35:27.

The Dashboard and Alerts.

15.1 Read the Dashboard

Goal: Understand your program at a glance. **Role needed:** Everyone. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. Scroll for **Program performance**; use **What do these mean?** for definitions.

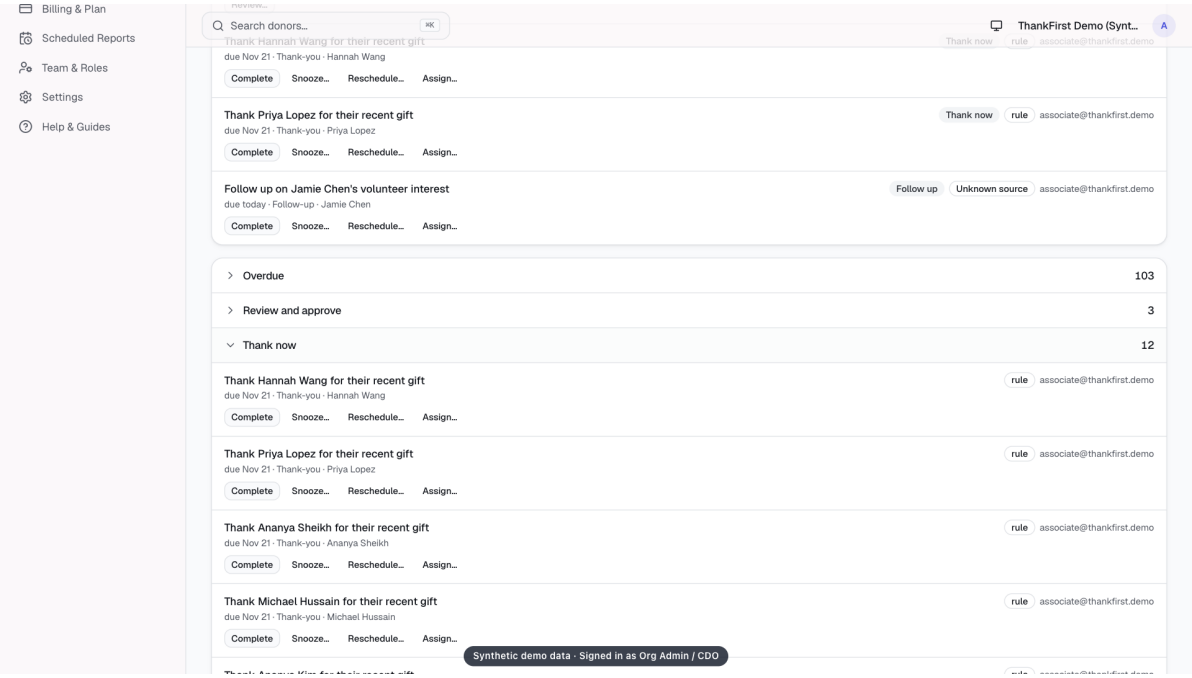


W15-1: Program counts Alerts and tasks

15.2 Act on an alert

Goal: Fix stewardship that's slipping. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Alerts**.
   – You'll know you're there: The heading says **Alerts**.
3. Click an alert's **open in Today** link.
   – Check: **Today** opens on the matching items.



W15-2: Today, filtered to the alert

15.3 Recap: where to find it

- **Dashboard:** the page after sign-in › click a card
- **Alerts:** Dashboard › Alerts › open in Today

15.4 More about this topic

Dashboard (all roles)

- **Tiles:**
  - **Historical giving portfolio**: reported or imported history;
  - **Activity recorded in ThankFirst**;
  - **Stewardship alerts**, **Open tasks**, **Volunteer shifts**;
  - **Program performance**;
  - **Donors by category** (**What do these mean?**);
  - **Operational tiers**;
  - **Committee activity**.
- **Board Viewers** see **Board Dashboard**, with aggregate metrics only.

Alerts

Where: sidebar → **Alerts**.

- **Alert types:** 48-hour thank-you breach, Overdue next action, Approaching lapse, Stale major donor, No next action scheduled.
- **Acting on alerts:** click a donor to act, or **Open these alerts in Today**.
- **Empty state:** "No open stewardship alerts. Nice — everyone's being thanked on time."

16. Gifts and gift batches

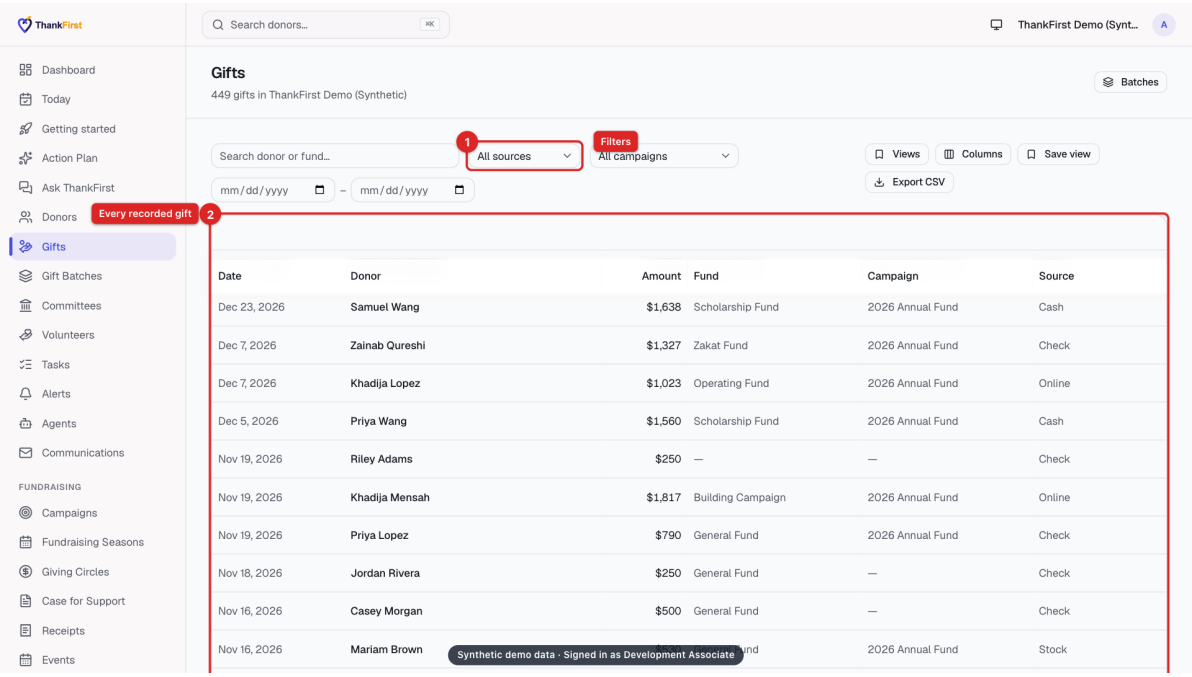
Video chapter 16 starts at 36:38.

Gifts and gift batches.

16.1 Find a gift

Goal: Look up recorded gifts. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Gifts**.
   – You'll know you're there: The heading says **Gifts**.
   – Check: Every recorded gift is listed.



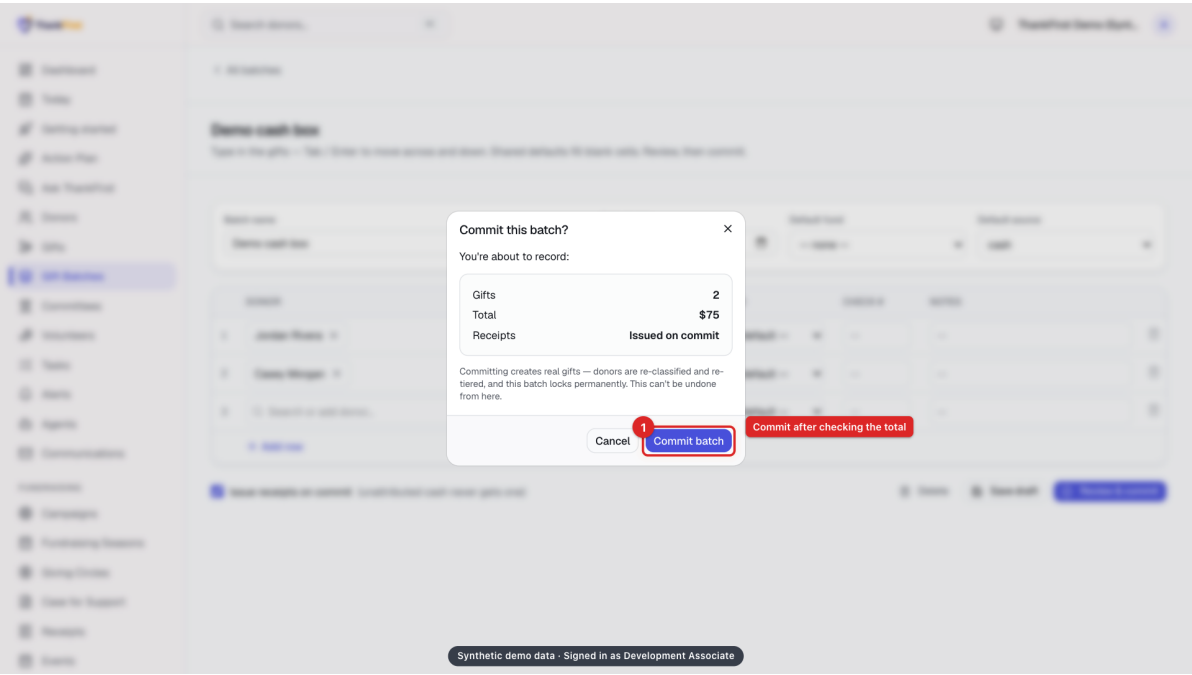
W16-1: Filters Every recorded gift

16.2 Enter a gift batch

Goal: Record a stack of checks or a cash box at once. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Gift Batches**.
   – You'll know you're there: The heading says **Gift batches**.
3. Click **New batch**.
4. Type a **batch name**.

5. Set the defaults (date, fund, **source**).
6. In each row, type the donor's name and pick the match.
7. Type the **amount** (required).
8. Click **Save draft** at any time.
9. Click **Review & commit**.
10. Click **Commit batch**.
    – Check: The message says **Committed — 2 gifts, $75.**



W16-2: Commit after checking the total

16.3 Recap: where to find it

- **Find gifts:** Dashboard › Gifts
- **Batch:** Dashboard › Gift Batches › New batch › rows › Save draft › Review & commit › Commit batch

16.4 More about this topic

Gifts list (all roles)

Where: sidebar → **Gifts**.

Filters: Search donor or fund…, source, campaign and a date range. **Save view** and **Export CSV** work as in chapter 6.

Gift batches (Org Admin, Development Associate)

1. Go to **Gift Batches** and click **New batch**.
2. Enter the **Batch name**, for example "Fri 7/18 cash box", then the **Default date**, **Default fund** and **Default source**.
3. Add rows:
   – **Donor** (search, **Add new donor "…"**, or **Unattributed cash (no donor)**);

  - **Amount**, **Date**, **Fund**, **Check #**, **Notes**;
  - **Add row** for each gift.
4. Optionally tick **Issue receipts on commit**.
5. Click **Save draft** (you'll see **Draft saved.**), or **Review & commit**, then **Commit batch**. You should see **Committed — N gifts, $X.**

If you see "N rows need fixing…", every row needs a donor (or "unattributed"), an amount and a date.

17. Receipts and year-end statements

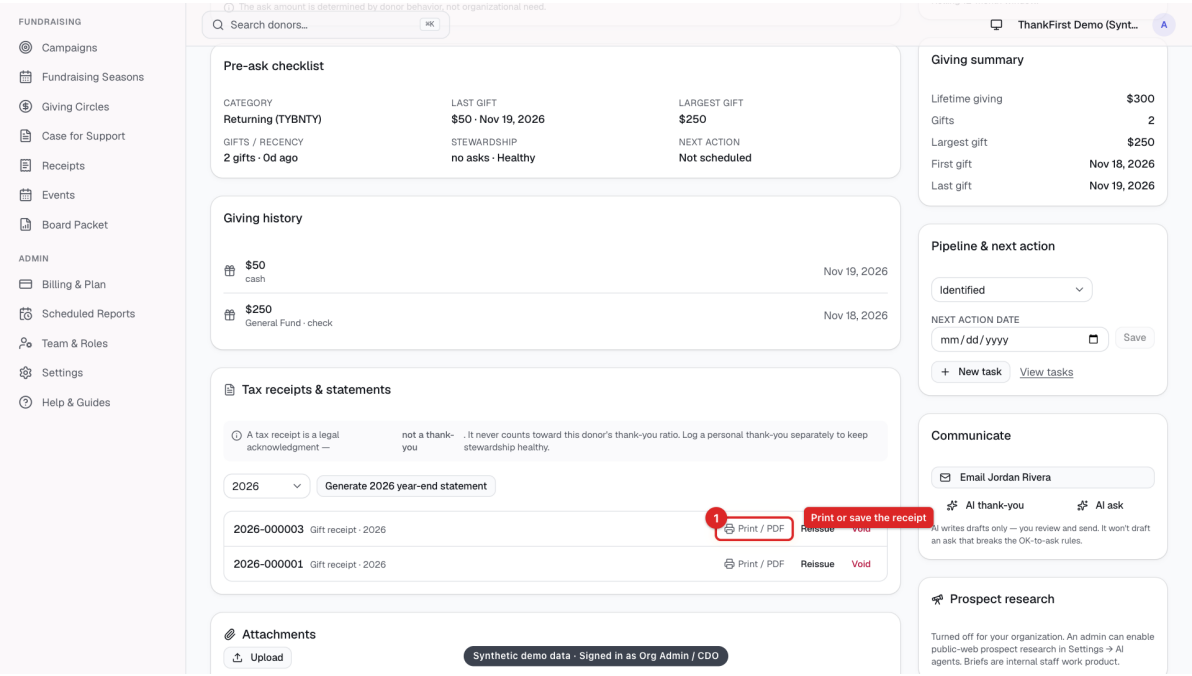
Video chapter 17 starts at 38:44.

Receipts and year-end statements.

17.1 Issue a receipt

Goal: Receipt a single gift. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. Search for the donor.
4. Open the donor's profile.
5. On the donor's profile, click **Issue receipt**.
   – Check: The message says **Done.** and the receipt is listed with **Print / PDF**, **Reissue** and **Void**.



W17-1: Print or save the receipt

17.2 Find year-end statements

Goal: Generate every donor's annual statement. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Receipts**.
   – You'll know you're there: The heading says **Receipts & statements**.
3. Choose the year and click **Generate all … year-end statements**.

- **Caution:** ⚠ Shown, not run in the training.

17.3 Recap: where to find it

- **One receipt:** Donors › donor › Issue receipt
- **Statements:** Dashboard › Receipts › year › Generate all year-end statements

17.4 More about this topic

Who: every role except Committee Member.

Where: sidebar → **Receipts**. The page "Receipts & statements" has three parts: **Funds & restrictions**, **Year-end statements** and **Issued receipts**.

1. **Single gift:** on the donor profile, under **Tax receipts & statements**, use **Issue receipt**. Use **Print / PDF**, **Reissue** or **Void** as needed.
2. **Year-end:** click **Generate all {year} year-end statements**. You should see **Generated N year-end statements.**
3. **Before issuing receipts,** set up the receipt legal details (chapter 30).

DAY 4 — FUNDRAISING PROGRAMS

18. Campaigns and pledges

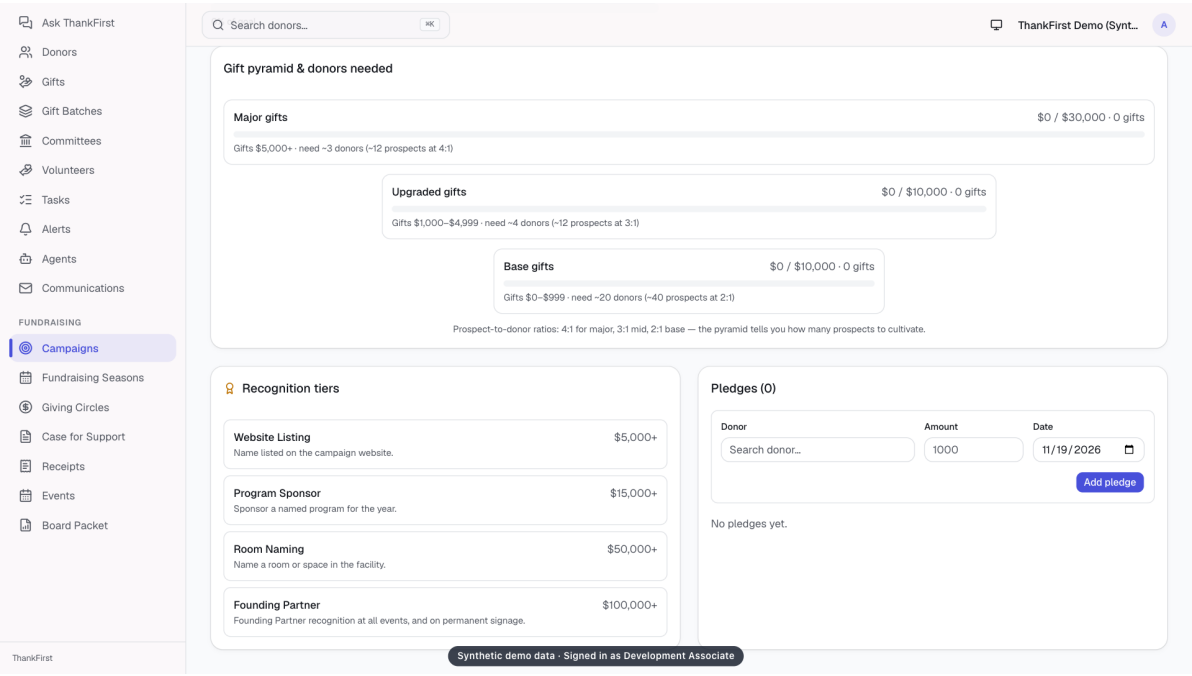
Video chapter 18 starts at 40:06.

Campaigns and pledges.

18.1 Create a campaign

Goal: Set a goal and get a gift pyramid. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Campaigns**.
   – You'll know you're there: The heading says **Campaigns**.
3. Click **New campaign**.
4. Type a **name** (required).
5. Type the **goal**.
6. Click **Create campaign**.
   – Check: The campaign page opens with the name and a gift pyramid.



W18-1: Campaign and goal

18.2 Find Add pledge

Goal: Record a donor's pledge. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.

2. In the left sidebar, click **Campaigns**.
   – You'll know you're there: The heading says **Campaigns**.
3. Open the campaign.
4. Click **Add pledge**, choose the donor and amount, and save.
   – **Caution:** ⚠ Shown, not run in the training.

18.3 Recap: where to find it

- **Campaign:** Dashboard › Campaigns › New campaign › name, goal › Create campaign
- **Pledge:** Campaigns › campaign › Add pledge

18.4 More about this topic

Who: every role can view. Staff create.

1. On **Campaigns**, click **New campaign**.
2. Enter the **Campaign name**, for example "2026 Annual Fund", and the **Goal (USD)**.
3. Click **Create campaign**. You should see **Campaign created with a default gift pyramid.**
4. Open the campaign to see:
   – **Gift pyramid & donors needed**;
   – **Recognition tiers**;
   – **Pledges**.
5. **To add a pledge:** pick a donor, enter the amount and date, then click **Add pledge**. You should see **Pledge recorded.**

19. Giving circles

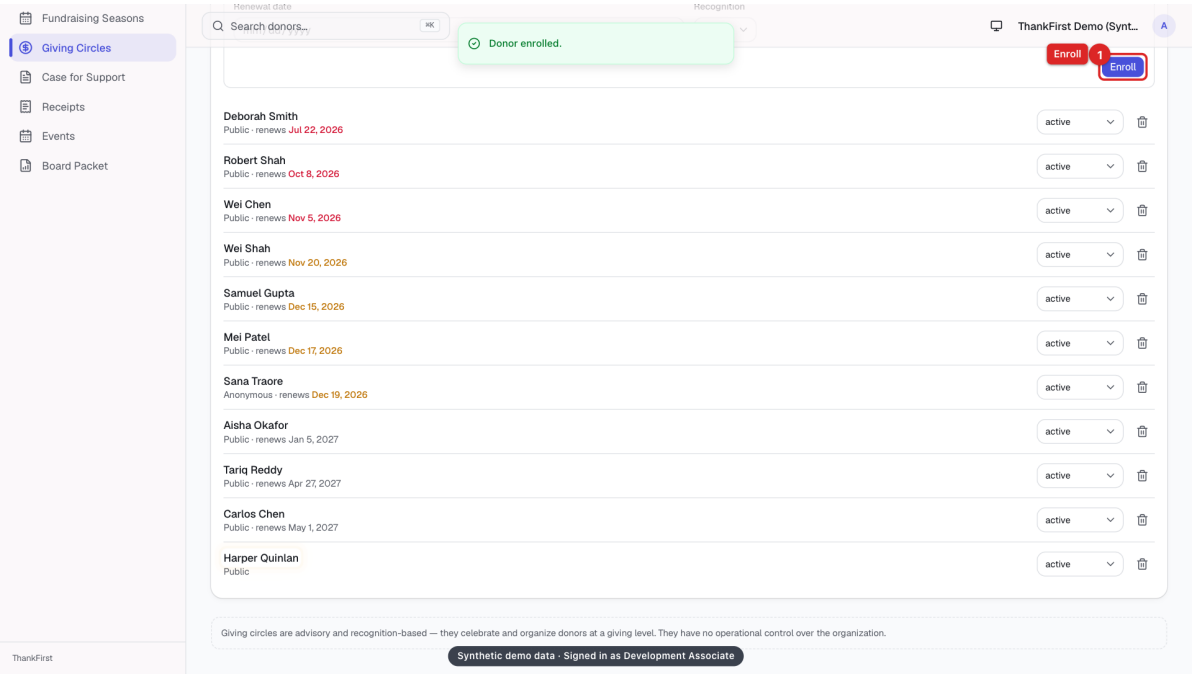
Video chapter 19 starts at 41:28.

Giving circles: membership groups with a cap, an annual amount and renewal dates.

19.1 Enroll a donor

Goal: Add a donor to a giving circle. **Role needed:** Development Associate or Org Admin (Growth plan). **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Giving Circles**.
   – You'll know you're there: The heading says **Giving Circles**.
3. Click a circle, for example **Supporter Circle**.
   – You'll know you're there: The heading is the circle's name.
4. In **Search donor…**, type the name.
5. Click the matching donor.
6. Check the dates and the **public or anonymous** recognition; click **Enroll**.
   – Check: The donor appears in the circle's member list.



W19-1: Enroll

19.2 Recap: where to find it

- **Enroll:** Dashboard › Giving Circles › circle › Search donor › Enroll

19.3 More about this topic

1. On **Giving Circles**:

  - click **Add starter set**; you'll see "Added N circles.";
  - or click **New circle** and fill in Name, Purpose, Member cap, Annual ($) and Revenue goal ($), then **Create circle**.

2. Open a circle and use **Enroll a donor**: pick the donor, the **Renewal date** and **Recognition** (Public / Anonymous), then click **Enroll**. You should see **Donor enrolled.**

What the cards show: members against the cap, revenue against the goal, and renewals due in 30 days.

20. Events

Video chapter 20 starts at 42:29.

Events.

20.1 Create an event

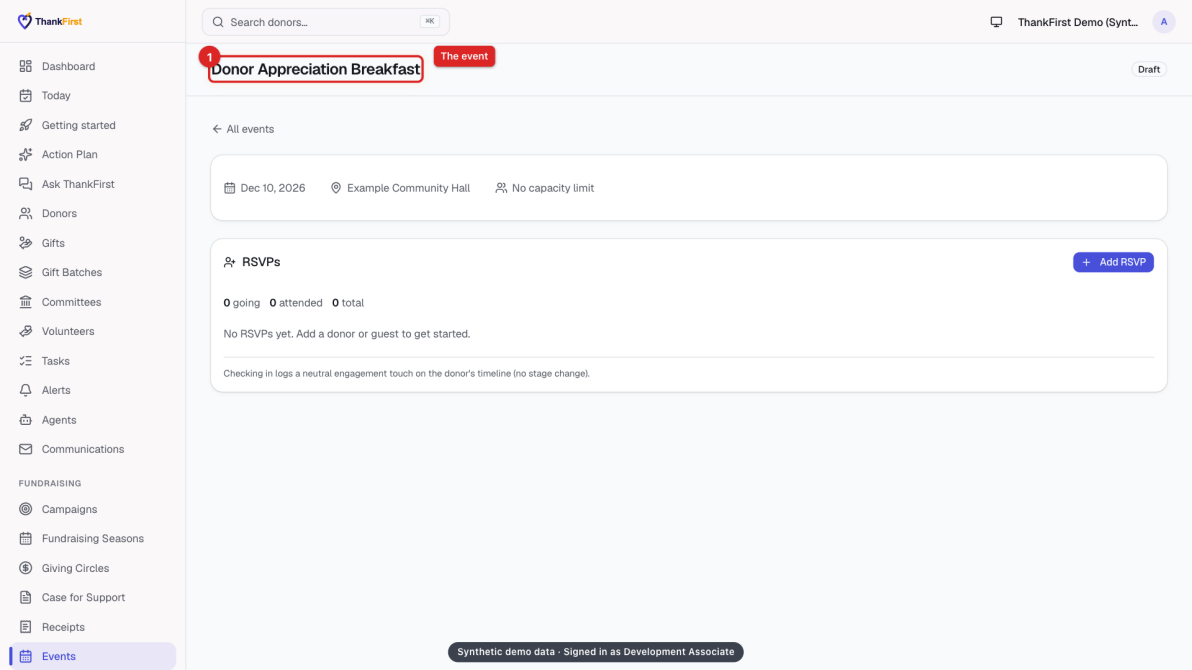
Goal: Set up an event to track RSVPs and attendance. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Events**.
   - You'll know you're there: The heading says **Events**.
3. Click **New event**.
4. Type the **name** (required).
5. Set the **date and time**.
6. Optional: the **place**.
7. Click **Create event**.
   - Check: The message says **Event created.**

20.2 Find RSVPs and check-in

Goal: Track who's coming and who came. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Events**.
   - You'll know you're there: The heading says **Events**.
3. Open the event.
4. Add **RSVPs**; on the day, **check in** attendees.
   - **Caution:** ⚠ Shown, not run in the training.



W20-1: The event

20.3 Recap: where to find it

- **Create:** Dashboard › Events › New event › name, date › Create event
- **RSVPs:** Events › event › RSVPs and check-in

20.4 More about this topic

Who: every role except Committee Member.

1. On **Events**, click **New event**.
2. Enter the **Name** and the optional details, then click **Create event**. You should see **Event created.**
3. Open the event and click **Add RSVP**.
   – Choose **A donor** or **A guest**.
   – Choose a status: Invited, Going, Not going or Waitlist.
   – You should see **RSVP added.**
4. On the day, use **Check in**. You'll see **Checked in.**, and the row shows **Attended**.

21. Volunteers

Video chapter 21 starts at 43:47.

Volunteers.

21.1 Create an opportunity

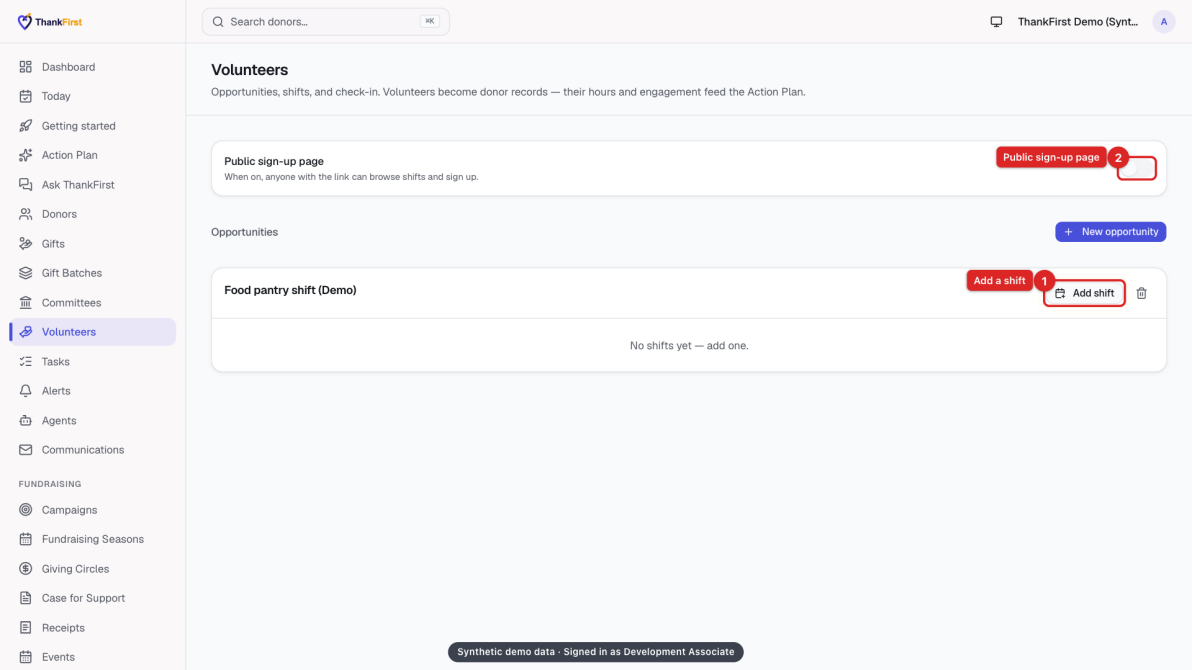
Goal: Set up something people can volunteer for. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Volunteers**.
   - You'll know you're there: The heading says **Volunteers**.
3. Click **New opportunity**.
4. Type the **name** (required).
5. Optional: the **location**.
6. Click **Create**.
   - Check: The opportunity is listed.

21.2 Find shifts and the sign-up page

Goal: Add shifts and share the sign-up link. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Volunteers**.
   - You'll know you're there: The heading says **Volunteers**.
3. On the opportunity, click **Add shift** and set the date, time and people needed.
   - **Caution:** ⚠ Shown, not run in the training.
4. Turn on the **public sign-up** switch and share the link.
   - **Caution:** ⚠ Shown, not run in the training.



W21-1: Add a shift Public sign-up page

21.3 Recap: where to find it

- **Opportunity:** Dashboard › Volunteers › New opportunity › name › Create
- **Shifts:** Volunteers › opportunity › Add shift; public sign-up switch

21.4 More about this topic

Who: Org Admin and Development Associate. Other roles see **Staff only**.

1. On **Volunteers**, click **New opportunity**.
   – Enter the Name, Description, Default location and, optionally, **Repeats weekly**.
   – Click **Create**. You'll see **Opportunity created.**
2. Click **Add shift**, enter Starts, Ends, Capacity, Location and Notes, then click **Add shift**. You'll see **Shift added.**
3. **To accept sign-ups from the public,** switch on the **Public sign-up page**. You'll see **Public sign-up page is live.** Share the public link.
4. **On the day,** open the shift's **Check-in**, then tick attendance. You'll see **Checked in — logged as a stewardship touch.** Record **Hours**.

Good to know: volunteers don't log in. Each sign-up becomes, or matches, a donor record (see chapter 35).

22. Case for Support

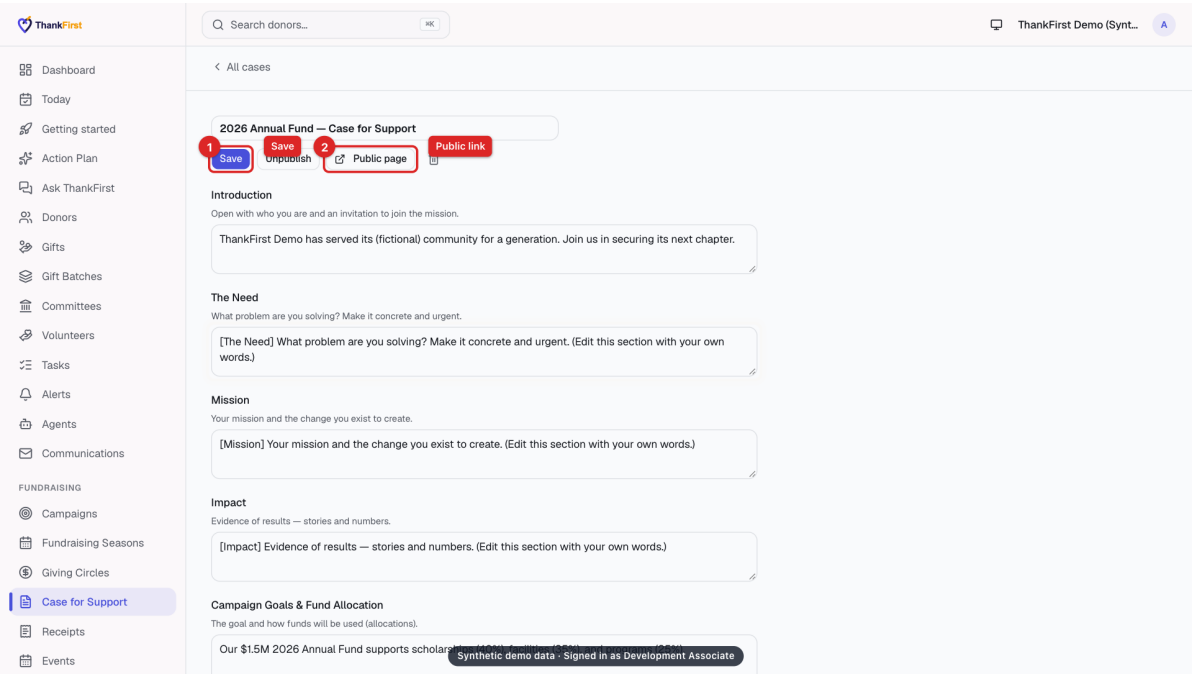
Video chapter 22 starts at 45:09.

The Case for Support explains why someone should give.

22.1 Edit a section

Goal: Improve your case and share it. **Role needed:** Development Associate or Org Admin (Growth plan). **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Case for Support**.
   – You'll know you're there: The heading says **Case for Support**.
3. Click the case.
4. Click into a section and edit it.
5. Click **Save**.
   – Check: A confirmation appears; **Public page** opens the shareable page.



W22-1: Save Public link

22.2 Recap: where to find it

- **Edit:** Dashboard › Case for Support › case › section › Save
- **Share:** case › Public page

22.3 More about this topic

Who: every role can view. Org Admin and Development Associate build cases.

1. On **Case for Support**, create a case: dialog **New Case for Support**, field **Title**, button **Create**.

2. Edit the sections and save. You'll see **Saved.**
3. Click **Publish** to share the case at its public link, shown in the builder. Click **Unpublish** to take it down.

Caution: ⚠ The section editor labels still need confirming live.

23. Fundraising seasons

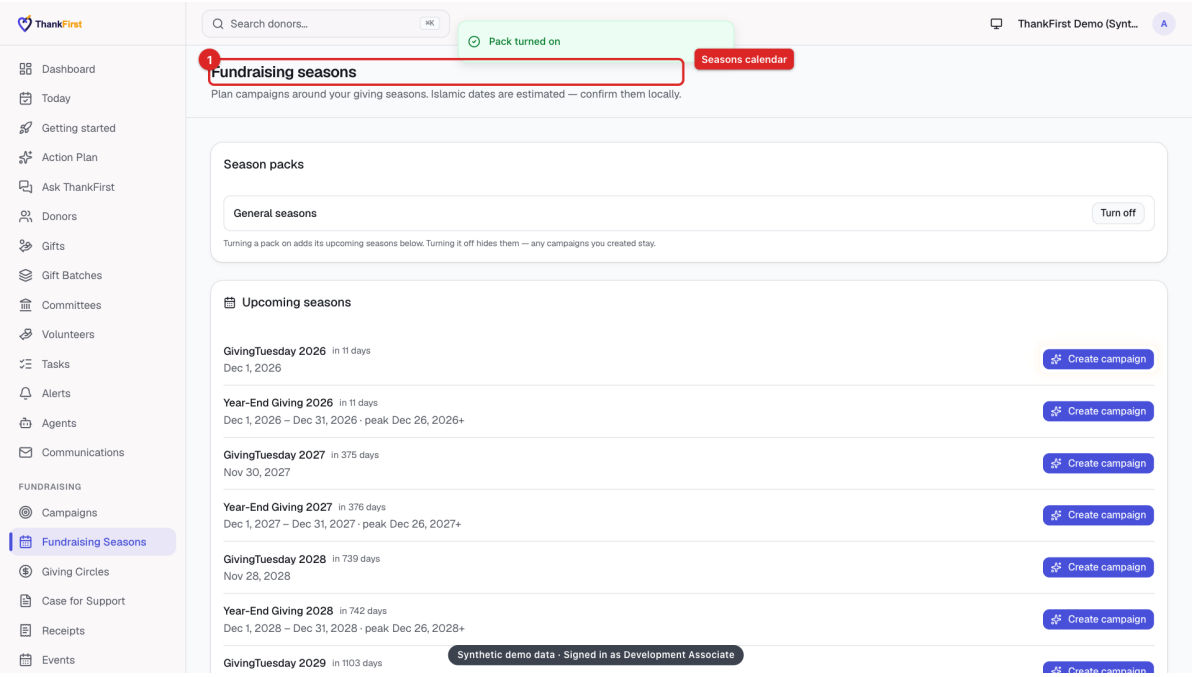
Video chapter 23 starts at 46:13.

Fundraising seasons put key giving periods on your calendar.

23.1 Turn on a season pack

Goal: See the giving seasons that fit your community. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Fundraising Seasons**.
   – You'll know you're there: The heading says **Fundraising seasons**.
3. Click **Turn on** for a season pack.
4. Confirm the dates; **Create campaign** starts a campaign from a season.
   – Check: The pack's seasons appear with dates.



W23-1: Seasons calendar

23.2 Recap: where to find it

- **Seasons:** Dashboard › Fundraising Seasons › Turn on › Create campaign

23.3 More about this topic

Who: Org Admin and Development Associate.

1. On **Fundraising Seasons**, turn on a **Season pack**.
2. Under **Upcoming seasons**, **Confirm** each date, or adjust it.
3. Optionally:

- **Set as Ramadan season**, for the ask window;
- **Create campaign**, which creates a campaign from the season.

Good to know: some packs appear only after ThankFirst grants them to your organization.

24. Communications (donor email) — conditional

Video chapter 24 starts at 47:01.

Availability. This feature depends on your organization's setup and plan (email delivery, payments, AI or API access). If it isn't turned on for your organization, you'll see the screens shown here but can't complete the last step. Ask your Org Admin or ThankFirst support to turn it on.

Caution: ⚠ **What it needs:** Email set up for your organization, and outbound donor email turned on by your admin.

Communications, donor email. This depends on your configuration. In this demo, email is off, so we'll show where things are, but send nothing.

24.1 Email one donor

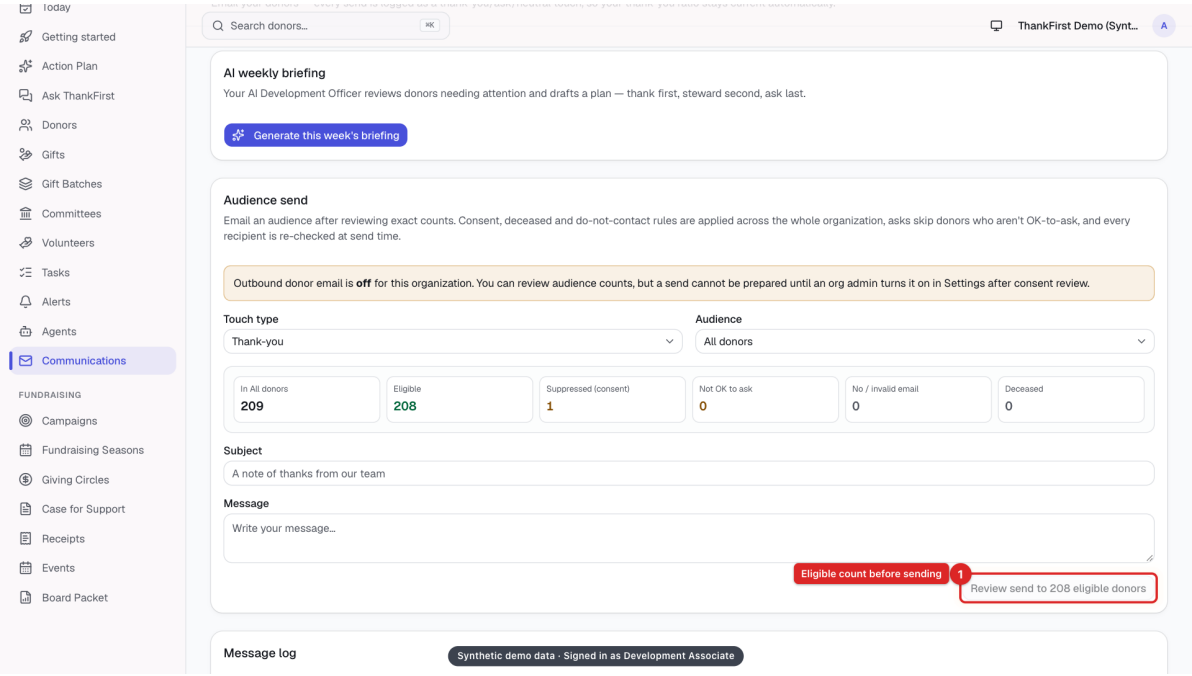
Goal: Send one donor an email. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   - You'll know you're there: The heading says **Donors**.
3. Search for the donor.
4. Open the donor's profile.
5. On the profile, click **Email [name]**.
   - **Caution:** ⚠ In the training video, email is off, so nothing is sent.

24.2 Review an audience send

Goal: Email a group, after seeing who's eligible. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Communications**.
   - You'll know you're there: The heading says **Communications**.
   - **Caution:** ⚠ In the training video, nothing is sent.



W24-1: Eligible count before sending

24.3 Recap: where to find it

- **One donor:** Donors › donor › Email [name]
- **Audience:** Dashboard › Communications › Review send to …

24.4 More about this topic

Who: Org Admin and Development Associate.

Before you can send: sending needs **two** things:

- email delivery set up for your organization;
- an Org Admin turning on **Outbound donor email** in Settings (chapter 29).

Until both are on, drafts are saved but nothing is sent.

Email one donor

1. On the donor profile, in **Communicate**, click **Email {name}**.
2. Choose the type, then fill in the **Subject** and **Message**.
3. Click **Send**. You should see **Sent — logged as a stewardship touch.**

Audience send

1. Go to **Communications** → **Audience send**.
2. Choose the **Touch type** and the **Audience**.
3. Check the counts: Eligible, Suppressed (consent), Not OK to ask, No / invalid email, Deceased.
4. Write the subject and message.
5. Click **Review send to N eligible donors**, then **Send to N donors**.
6. Watch the progress. **Cancel send** stops pending recipients.

Messages you may see:

- **"Email delivery isn't configured on this deployment, so nothing can be sent yet."**
- **"Outbound donor email is turned off for this organization…"**
- **"This donor has opted out of this kind of email (consent/DNC)."**

DAY 5 — BOARD AND COMMITTEES

25. Committees: setup, roster and assignments

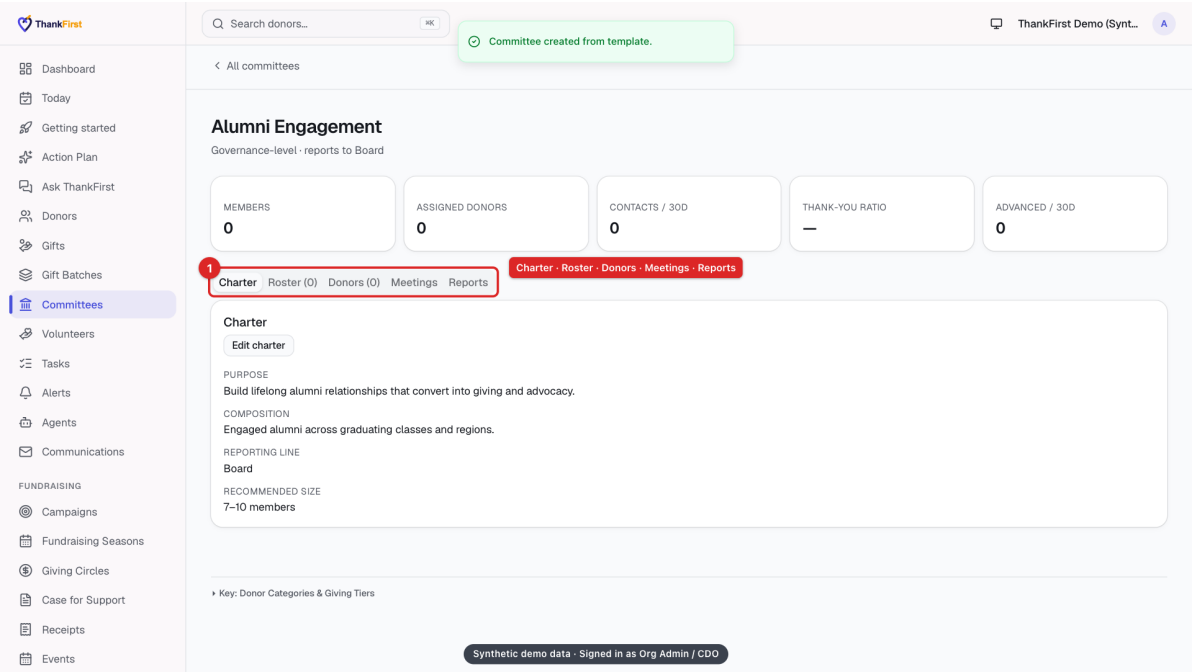
Video chapter 25 starts at 48:34.

Committees bring volunteers into donor work.

25.1 Create a committee

Goal: Start a committee from a template. **Role needed:** Org Admin or Development Associate. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Committees**.
   – You'll know you're there: The heading says **Committees**.
3. Click **New committee**.
4. Pick a **template**.
   – Check: The new committee opens on its **Charter**.



W25-1: Charter · Roster · Donors · Meetings · Reports

25.2 Add a person to the roster

Goal: Give a person a seat on the committee. **Role needed:** Org Admin or Development Associate. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Committees**.
   – You'll know you're there: The heading says **Committees**.

3. Open the committee.
4. Click **Roster**.
5. Click **Choose a person…**.
6. Choose the person.
7. Choose their committee role and click **Add**.
   – Check: The person appears on the roster.

25.3 Find assignments and meetings

Goal: Give the committee donors, and plan meetings. **Role needed:** Org Admin or Development Associate. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Committees**.
   – You'll know you're there: The heading says **Committees**.
3. Open the committee.
4. Click **Donors**.
5. Click **Assign donors**, choose donors, and assign them to the committee or a member.
   – **Caution:** ⚠ Shown, not run in the training.
6. Click **Meetings**.
7. Click **Schedule meeting**.
   – **Caution:** ⚠ Shown, not run in the training.

25.4 Recap: where to find it

- **Create:** Dashboard › Committees › New committee › template
- **Roster:** committee › Roster › Choose a person… › Add
- **Donors & meetings:** committee › Donors › Assign donors; Meetings › Schedule meeting

25.5 More about this topic

Who:

- Create committees and assign donors: Org Admin and Development Associate.
- Add members: Org Admin.
- Meetings and reports: staff, or the committee's Chair.

1. On **Committees**, click **New committee**, then pick a template, for example **Major Gifts & Planned Giving**. You should see **Committee created from template.**
2. Open the committee. The tabs are **Charter**, **Roster**, **Donors**, **Meetings** and **Reports**.
3. On **Roster**, use **Add a team member**.
   – Choose the person and the committee **Role**: Chair, Board Liaison, Staff Lead or Member.
   – Click **Add**. You'll see **Member added.**
   – Tick the compliance items: **Commitment form signed**, **Confidentiality / NDA acknowledged**, **Orientation completed**.
4. On **Donors**, click **Assign donors**.

  - Search for the donors, then choose **Assign to**: **Committee-wide (chair sees all)** or a specific member.
  - Click **Assign N**. You'll see **Assigned N donors.**
5. On **Meetings**, click **Schedule meeting**. Afterwards, use **Edit minutes**, then **Save minutes**.
6. On **Reports**, click **Submit monthly report**. It rolls up to the CDO and Board dashboards.

Caution: ⚠ **Known issue:** a volunteer Committee Chair can open **Edit charter** and click **Save charter**, and sees **Charter updated.**, but the change is **not saved**. The same edit by an admin is saved. Volunteer chairs should ask their Staff Lead or an admin to edit the charter.

26. Working as a committee chair or member

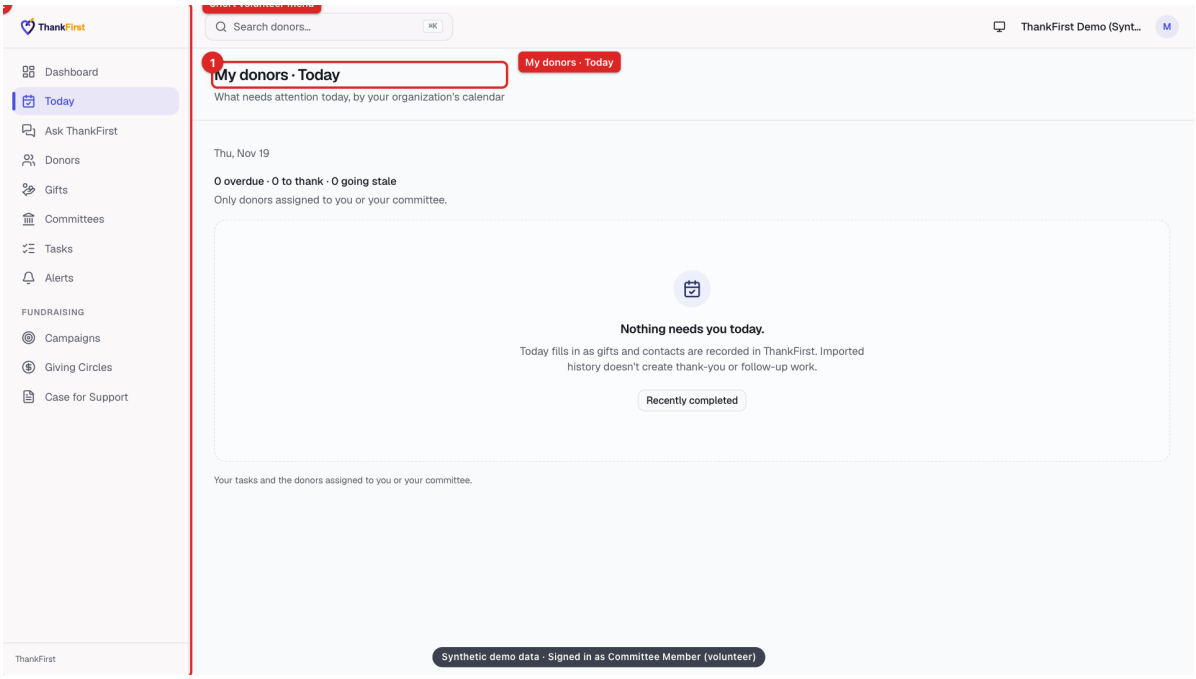
Video chapter 26 starts at 50:51.

Working as a committee chair or member. You see only the donors assigned to you.

26.1 See your donors for today

Goal: Find what to do today. **Role needed:** Committee Member or Chair. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Today**.
   – You'll know you're there: The heading says **My donors · Today**.
   – Check: The heading says **My donors · Today**.



W26-1: My donors · Today Short volunteer menu

26.2 Open an assigned donor

Goal: Work with one of your donors. **Role needed:** Committee Member or Chair. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Donors**.
   – You'll know you're there: The heading says **Donors**.
3. Click a donor's name.
4. Use **Log interaction** to record a conversation.

26.3 Use your committee's playbook

Goal: Find talking points and the first-contact checklist. **Role needed:** Committee Member or Chair. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Committees**.
   – You'll know you're there: The heading says **Committees**.
3. Open your committee.
4. Scroll to the **playbook**.
   – **Caution:** ⚠ A volunteer chair's charter edit shows **Charter updated.** but isn't kept. Ask your staff lead to update the charter.

26.4 Recap: where to find it

- **Today:** Dashboard › Today (My donors · Today)
- **Donor:** Dashboard › Donors › name › Log interaction
- **Playbook:** Dashboard › Committees › your committee

26.5 More about this topic

What you see:

- **Today** shows **My donors · Today**.
- **Donors** lists only your assigned donors, plus committee-wide donors if you're the committee's Chair.

What you can do for donors in your scope:

- log interactions;
- create tasks;
- move the pipeline stage.

Coaching: the committee page includes **Your first-contact playbook**, a **First-contact checklist**, **Talking points** and **Common mistakes to avoid**.

What you can't do:

- add or import donors;
- merge records;
- see Volunteers or Fundraising Seasons.

Committee Members also can't open Receipts, Events, the Board Packet or Communications; they're sent to the Dashboard.

Caution: ⚠ **Volunteer chairs:** editing the committee charter shows **Charter updated.** but doesn't save (see chapter 25). Ask staff to make charter changes.

27. Board viewers, the Dashboard and the Board Packet

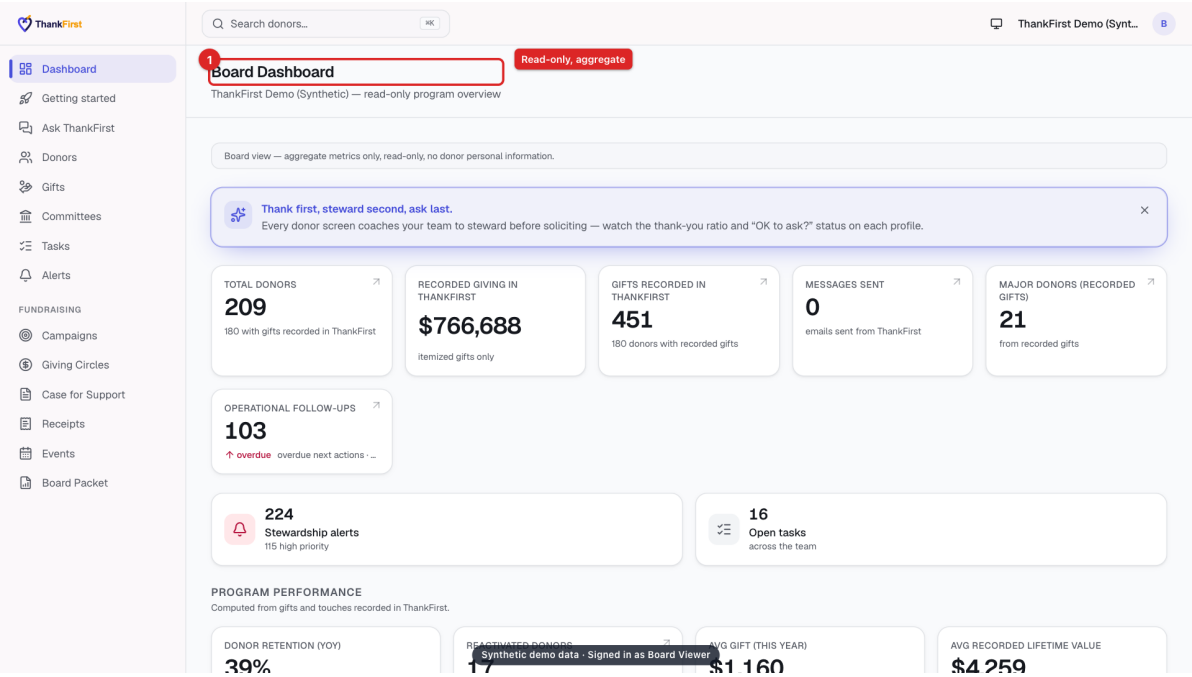
Video chapter 27 starts at 52:46.

Board viewers see read-only, aggregate dashboards, with no personal donor details.

27.1 Read the board Dashboard

Goal: See the program at a glance. **Role needed:** Board Viewer. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
   - Check: Only totals and summaries are shown.



W27-1: Read-only, aggregate

27.2 Open the Board Packet

Goal: Get a period summary for a board meeting. **Role needed:** Board Viewer, Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Board Packet**.
   - You'll know you're there: The heading says **Board Packet**.
3. Choose the **period** (for example **This quarter**).
4. Click **Export PDF**.
   - **Caution:** ⚠ Shown, not run in the training.

27.3 Recap: where to find it

- **Board Packet:** Dashboard › Board Packet › period › Export PDF

27.4 More about this topic

Board Viewer:

- The home page is the **Board Dashboard**: "Board view — aggregate metrics only, read-only, no donor personal information."
- Board Viewers can open the Board Packet, Receipts and Events, read-only.

Board Packet (all roles except Committee Member):

1. Choose the **Reporting period**: This month, This quarter, This year, or a custom range.
2. Review the sections:
   - this period's totals;
   - program performance;
   - campaign progress;
   - giving-circle fill rates;
   - committee activity;
   - notable gifts.
3. Click **Export PDF** to print or save it.

ADMIN TRACK

28. Team & Roles

(Org Admin)

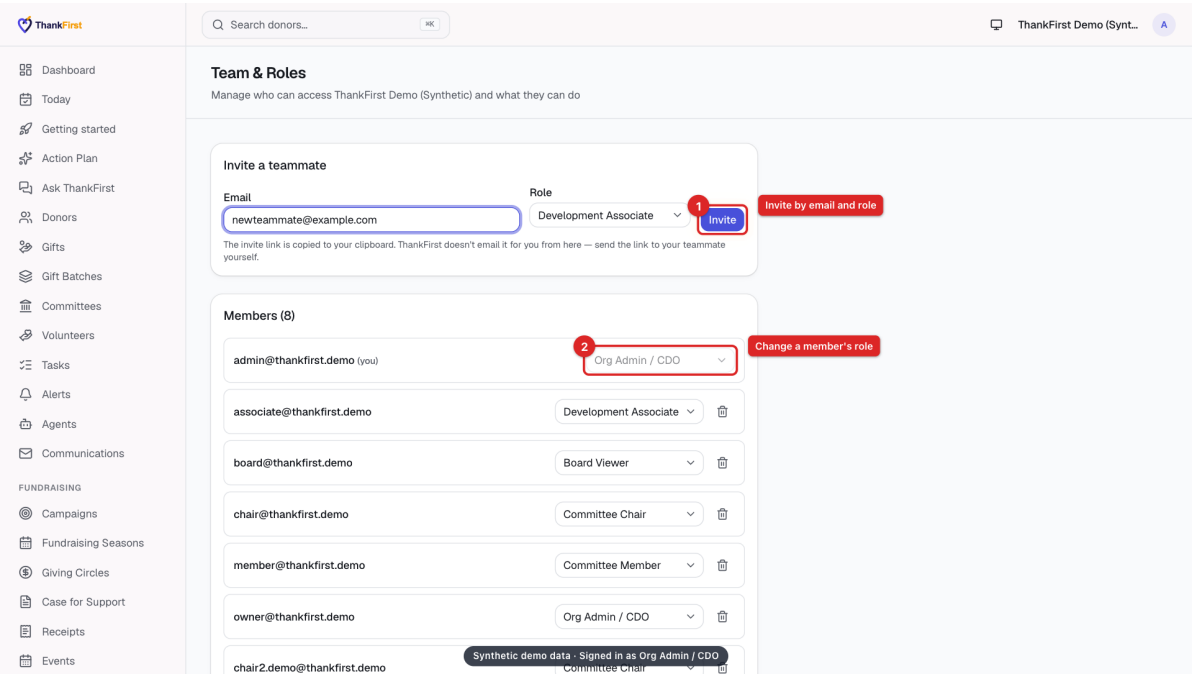
> Video chapter 28 starts at 53:46.

Team and Roles, for admins. One caution first: if saving here shows an error, nothing was changed. Contact ThankFirst support. We'll show each step up to the button.

28.1 Invite a teammate

Goal: Give a new person access. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Team & Roles**.
   - You'll know you're there: The heading says **Team & Roles**.
3. Type the person's **email**.
4. Choose their **role**.
5. Click **Invite**, then send the copied link to your teammate.
   - **Caution:** ⚠ If saving shows an error, the change wasn't saved. Contact ThankFirst support. The training shows each step up to the button.



W28-1: Invite by email and role Change a member's role

28.2 Change a role, or remove someone

Goal: Keep access up to date. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.

2. In the left sidebar, click **Team & Roles**.
   – You'll know you're there: The heading says **Team & Roles**.
3. Choose a new role from the member's dropdown.
   – **Caution:** ⚠ If saving shows an error, the change wasn't saved. Contact ThankFirst support. The training shows each step up to the button.
   – **Caution:** ⚠ If saving shows an error, the change wasn't saved. Contact ThankFirst support. The training shows each step up to the button.

28.3 Recap: where to find it

- **Invite:** Dashboard › Team & Roles › email › role › Invite
- **Change role:** Team & Roles › member's dropdown

28.4 More about this topic

Where: Admin → **Team & Roles**.

Invite someone

1. Under **Invite a teammate**, enter the **Email** and choose the **Role**.
2. Click **Invite**. You'll see **Invitation created — link copied to clipboard.**
3. Send the link to the person yourself; this screen doesn't send an email.
4. Manage invitations in **Pending invitations**: use copy (**Invite link copied.**) or revoke (**Invitation revoked.**).

Change a role or remove someone

- **To change a role:** use the dropdown in **Members**. You'll see **Role updated.**
- **To remove someone:** click the trash icon. You'll see **Member removed.**

Caution: ⚠ **There is no confirmation prompt when removing someone.** Double-check before you click.

Your own row: your own role dropdown is greyed out and has no remove button, so you can't demote or remove yourself. This also stops an only admin from locking the organization out.

Caution: ⚠ **If you see an error:** if **Invite**, changing a role, removing a member or revoking an invitation shows an error, nothing was changed. Contact ThankFirst support. The invitee's side (opening the link and **Accept invitation**) works normally.

29. Organization settings, security and the audit log

(Org Admin)

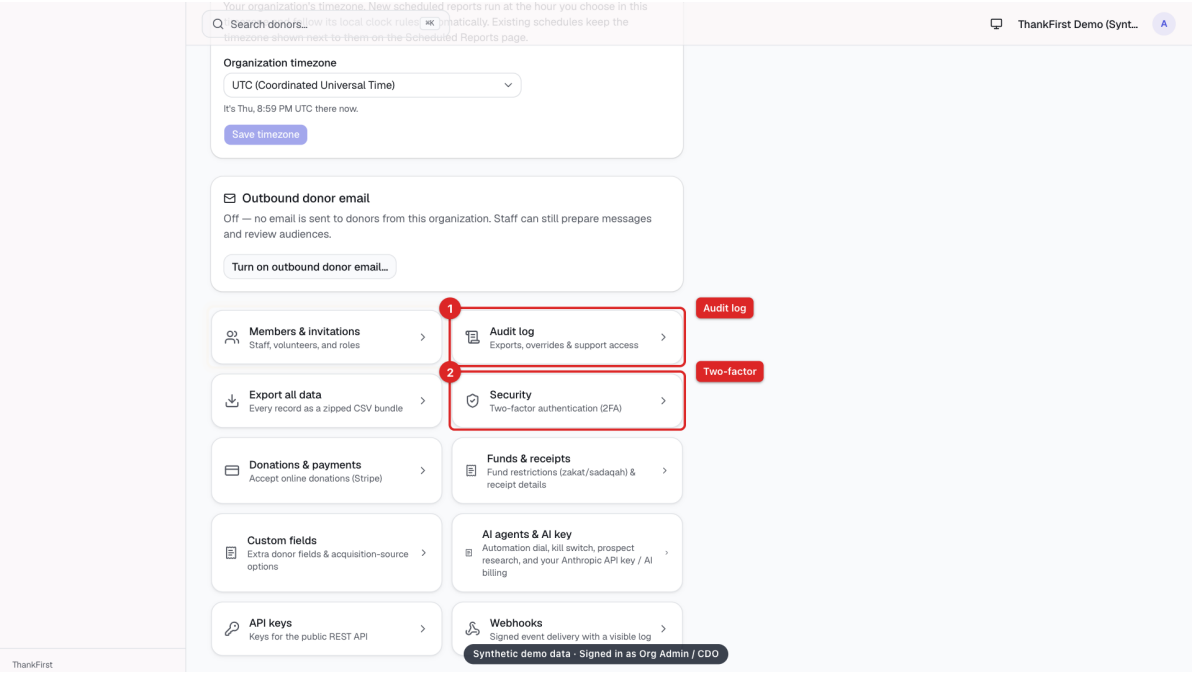
Video chapter 29 starts at 55:27.

Organization settings, security and the audit log, for admins.

29.1 Find organization settings

Goal: Set branding, thresholds and your timezone. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Settings**.
   – You'll know you're there: The heading says **Settings**.
3. Edit the form and click **Save settings**; choose the timezone and click **Save timezone**.
   – **Caution:** ⚠ If saving shows an error, the change wasn't saved. Contact ThankFirst support. The training shows each step up to the button.
   – **Caution:** ⚠ If saving shows an error, the change wasn't saved. Contact ThankFirst support. The training shows each step up to the button.



W29-1: Audit log Two-factor Organization form

29.2 Require two-factor sign-in

Goal: Make everyone use two-factor sign-in. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Settings**.

   - You'll know you're there: The heading says **Settings**.
3. Turn on **Require two-factor authentication for all members**.
   - **Caution:** ⚠ If saving shows an error, the setting wasn't saved. Contact ThankFirst support.

29.3 Open the audit log

Goal: See sensitive actions. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Settings**.
   - You'll know you're there: The heading says **Settings**.
3. Click the **Audit log** tile.
   - Check: The heading says **Audit log**.
4. **Export all data** downloads every record.
   - **Caution:** ⚠ Shown, not run in the training.

29.4 Recap: where to find it

- **Settings:** Dashboard › Settings (Admin section)
- **Two-factor:** Settings › Require two-factor…
- **Audit log:** Settings › Audit log

29.5 More about this topic

Where: Admin → **Settings**. It's a grid of tiles.

1. **Organization form:**
   - **Platform name (branding)**;
   - **Category & health thresholds**;
   - **Time-between-asks (days after a gift)**;
   - **Minimum stewardship touches**;
   - **Households**;
   - **Communications** (**Reply-to email**);
   - **Campaign season (Ramadan mode)**;
   - **Security**: **Require two-factor authentication for all members**.

   Click **Save settings**. You'll see "Settings saved. Ask-timing and categories recompute on the next gift/interaction."
2. **Timezone:** set **Organization timezone**, then **Save timezone**. Today follows your organization's calendar, so set this first.
3. **Outbound donor email:** click **Yes, turn on outbound email** (chapter 24).

Caution: ⚠ **If you see an error:** if **Save settings**, **Save timezone** or turning on outbound email shows an error, the change wasn't saved. Contact ThankFirst support.

4. **Tiles:**
   - Members & invitations;
   - **Audit log**;

- **Export all data**, a full organization export;
- **Security**;
- Donations & payments;
- Funds & receipts;
- Custom fields;
- AI agents & AI key;
- API keys;
- Webhooks.

30. Funds, receipt details and custom fields

(Org Admin)

> Video chapter 30 starts at 57:28.

Funds, receipt details and custom fields, for admins.

30.1 Add a fund

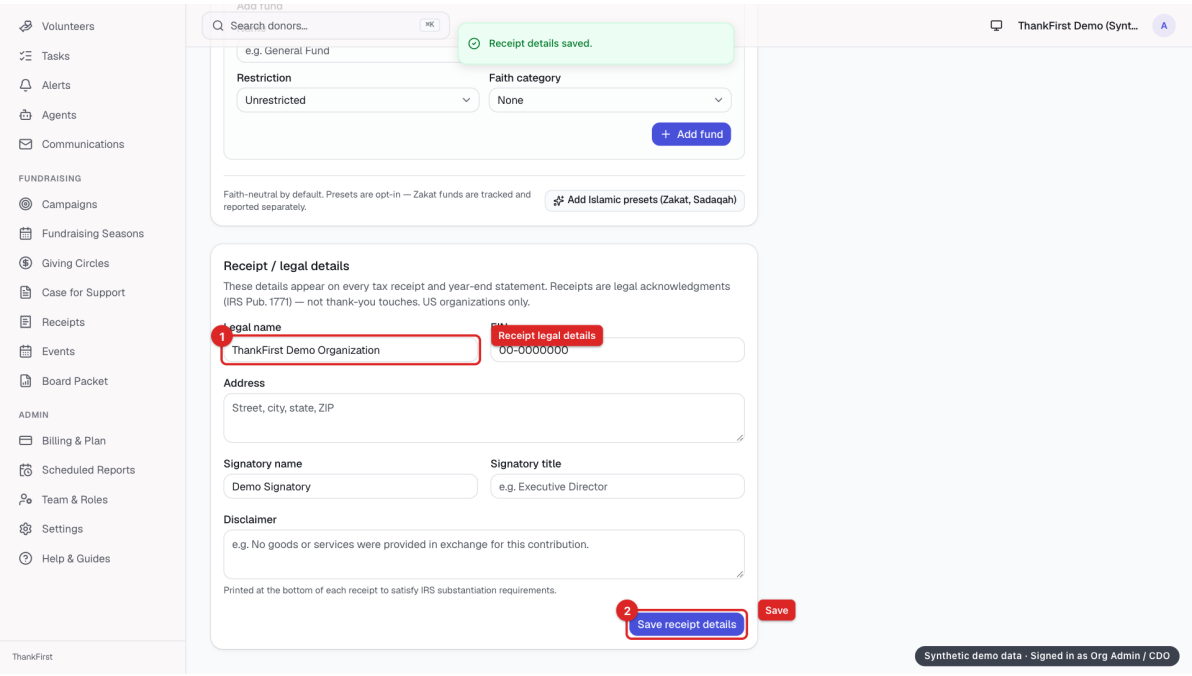
Goal: Define where gifts go. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Settings**.
   - You'll know you're there: The heading says **Settings**.
3. Click **Funds & receipts**.
   - You'll know you're there: The heading says **Funds & receipts**.
4. Type the fund **name** (required).
5. Optional: a description and restriction.
6. Click **Add fund**.
   - Check: The message says **Fund added.** and the fund is listed.

30.2 Enter receipt details

Goal: Print your legal details on receipts. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Settings**.
   - You'll know you're there: The heading says **Settings**.
3. Open **Funds & receipts**.
4. Type the **legal name**.
5. Type the **EIN**.
6. Type the **signatory**.
7. Click **Save receipt details**.
   - Check: A confirmation appears and the details stay filled in.



W30-1: Receipt legal details Save

30.3 Add a custom field

Goal: Track something specific to your organization. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Settings**.
   - You'll know you're there: The heading says **Settings**.
3. Click **Custom fields**.
4. Type the field **name** and choose its **type**.
5. Click **Add field**.
   - Check: The new field is listed.

30.4 Recap: where to find it

- **Fund:** Settings › Funds & receipts › name › Add fund
- **Receipt details:** Funds & receipts › details › Save receipt details
- **Custom field:** Settings › Custom fields › name › Add field

30.5 More about this topic

1. **Funds & receipts:**
   - Click **Add fund**: Name, Description, Restriction, and Faith category (None / Zakat / Sadaqah). You'll see **Fund added.**
   - Optionally click **Add Islamic presets (Zakat, Sadaqah)**.
2. **Receipt / legal details:**
   - Fill in Legal name, EIN, Address, Signatory name and title, and Disclaimer.

- Click **Save receipt details**.

3. **Custom fields:**
   - Enter the **Field label**, **Type** and **Options**, then click **Add field**. You'll see **Custom field added.**
   - **Archive** or **Restore** fields.
   - Manage **Acquisition sources**.

31. Billing & plan

(Org Admin)

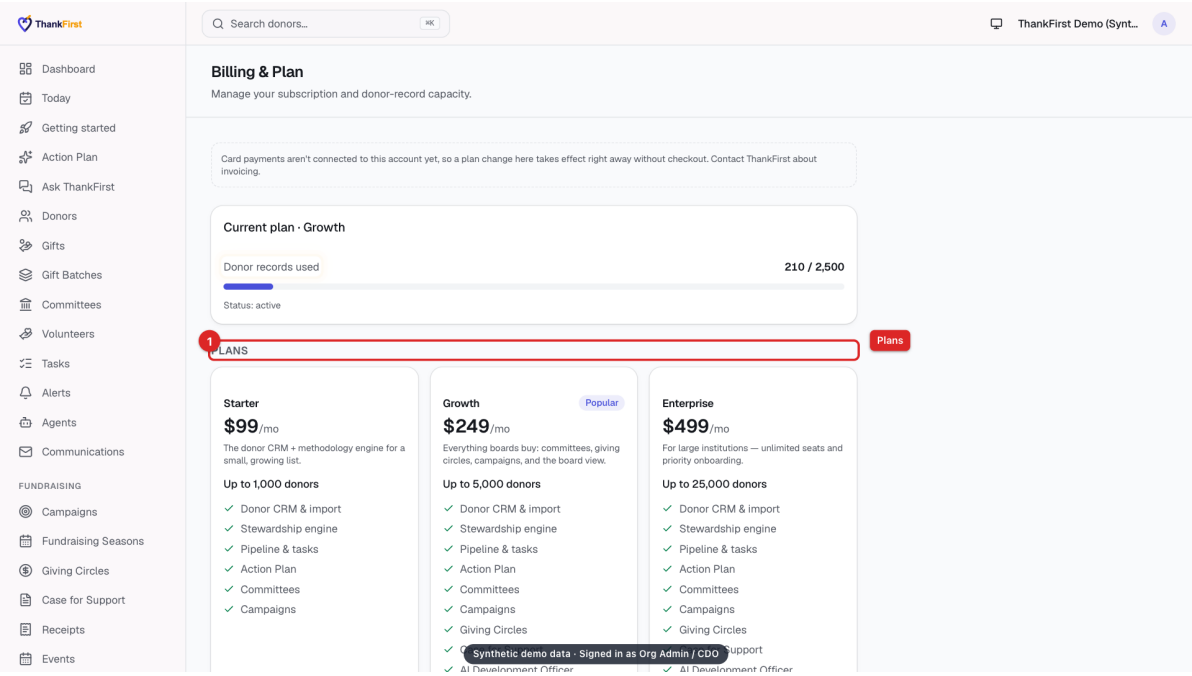
> Video chapter 31 starts at 59:44.

Billing and plan, for admins.

31.1 Check your plan

Goal: See your plan and donor-record usage. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Billing & Plan**.
   – You'll know you're there: The heading says **Billing & Plan**.
   – **Caution:** ⚠ Plan switching was not run: it takes effect immediately.



W31-1: Plans

31.2 Recap: where to find it

- **Plan:** Dashboard › Billing & Plan

31.3 More about this topic

Where: Admin → **Billing & Plan**.

What you'll see: Current plan, the **Donor records used** meter, and the **Plans** section (**Upgrade** / **Switch**).

Plan	Donors	Includes
Starter	1,000	Core CRM, stewardship, action plan, committees, campaigns

Plan	Donors	Includes
Growth	5,000	Adds giving circles, Case for Support, AI, API
Enterprise	25,000	Everything

Caution: ⚠ **Note:** if a feature isn't in your plan, its page sends you to Billing without an explanation. The sidebar still shows Giving Circles and Case for Support on Starter.

32. Online donations — conditional

Video chapter 32 starts at 1:00:34.

Availability. This feature depends on your organization's setup and plan (email delivery, payments, AI or API access). If it isn't turned on for your organization, you'll see the screens shown here but can't complete the last step. Ask your Org Admin or ThankFirst support to turn it on.

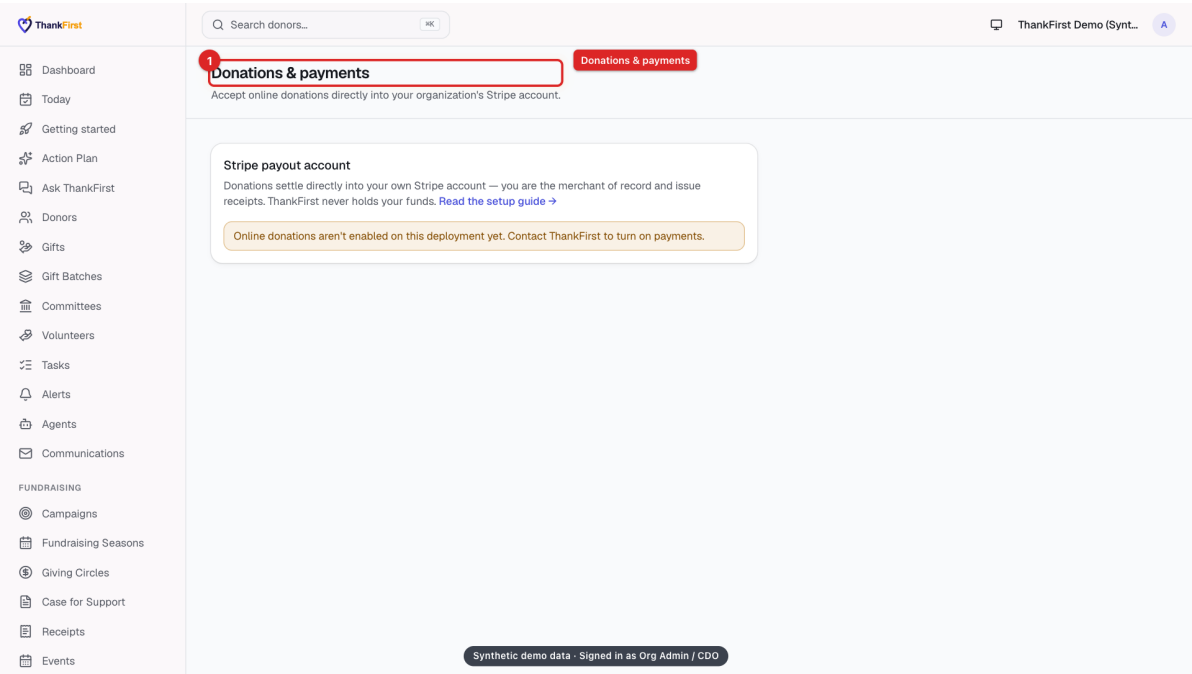
Caution: ⚠ **What it needs:** Online payments turned on for your organization by ThankFirst, plus your own Stripe account.

Online donations. This depends on your configuration. In this demo, payments are off.

32.1 Find donation settings

Goal: Accept donations online. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Settings**.
   – You'll know you're there: The heading says **Settings**.
3. Click **Donations & payments**.
   – **Caution:** ⚠ In the training video, payments are off.
   – **Caution:** ⚠ Not shown in the training video.



W32-1: Donations & payments

32.2 Recap: where to find it

- **Donations:** Dashboard › Settings › Donations & payments

32.3 More about this topic

Where: Settings → **Donations & payments**.

1. Click **Connect with Stripe**, and **Finish Stripe setup** if asked.
2. Under **Donation page**, turn on **Accept online donations**. Optionally turn on **Offer donors the option to cover fees** and **Fund designations**.
3. Click **Save donation settings**.
4. Share your public donation page. Personalized **Ask link**s (chapter 9.3) use it.

If donations aren't available: "Online donations aren't enabled on this deployment yet. Contact ThankFirst to turn on payments."

33. AI features — conditional

Video chapter 33 starts at 1:01:31.

Availability. This feature depends on your organization's setup and plan (email delivery, payments, AI or API access). If it isn't turned on for your organization, you'll see the screens shown here but can't complete the last step. Ask your Org Admin or ThankFirst support to turn it on.

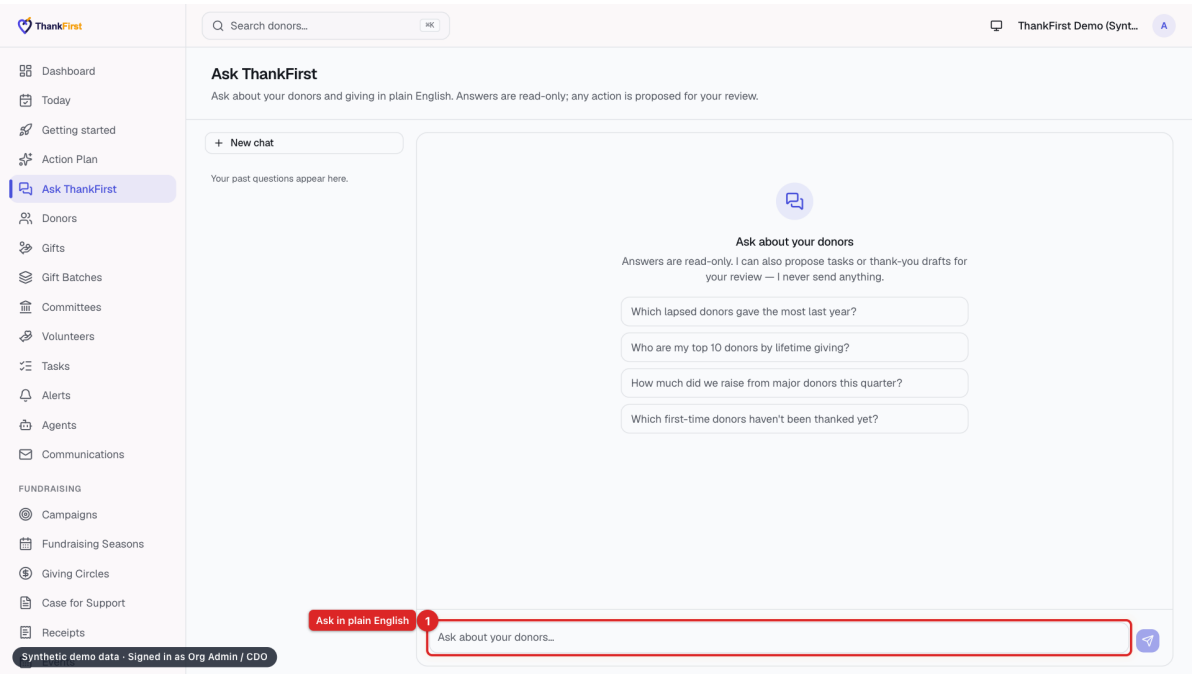
Caution: ⚠ **What it needs:** Growth or Enterprise plan, with AI enabled (add-on or your own AI key).

AI features. These depend on your plan and configuration. In this demo, AI is off.

33.1 Find Ask ThankFirst

Goal: Ask questions about your donors in plain English. **Role needed:** Development Associate or Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Ask ThankFirst**.
   – You'll know you're there: The heading says **Ask ThankFirst**.
   – **Caution:** ⚠ In the training video, AI is off, so no question is sent.



W33-1: Ask in plain English

33.2 Find the AI controls

Goal: Control automation. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.

2. In the left sidebar, click **Settings**.
   – You'll know you're there: The heading says **Settings**.
3. Click **AI agents & AI key**.
4. **Pause all agents** stops all automation at once.
   – **Caution:** ⚠ Shown, not changed.

33.3 Recap: where to find it

- **Ask:** Dashboard › Ask ThankFirst
- **Controls:** Settings › AI agents & AI key

33.4 More about this topic

What there is:

- **Ask ThankFirst** (read-only Q&A);
- **Agents**, a review queue for donor-requested changes and agent activity;
- AI draft buttons in **Communicate**;
- **Settings → AI agents & AI key**: kill switch, per-task autonomy (Off / Suggest / Prepare / Auto), your Anthropic key, prospect research.

Approving donor-requested changes doesn't need AI: donors' portal edits arrive on **Agents** under **Waiting for you — donor changes to review**. **Approve** gives **Change applied.**, even with AI off. If the donor's value changed after the request, approving shows "This change is no longer current — the donor changed, was merged or is deceased. Refresh to see it."

In the training demo AI is off, so no question is sent to Ask ThankFirst and nothing is generated. The video shows the screens, the kill switch (**Pause all agents**) and the autonomy settings.

34. API keys and webhooks — conditional

(Growth/Enterprise)

Video chapter 34 starts at 1:02:48.

Availability. This feature depends on your organization's setup and plan (email delivery, payments, AI or API access). If it isn't turned on for your organization, you'll see the screens shown here but can't complete the last step. Ask your Org Admin or ThankFirst support to turn it on.

Caution: ⚠ **What it needs:** Growth or Enterprise plan.

API keys and webhooks, for admins on Growth or Enterprise.

34.1 Create an API key

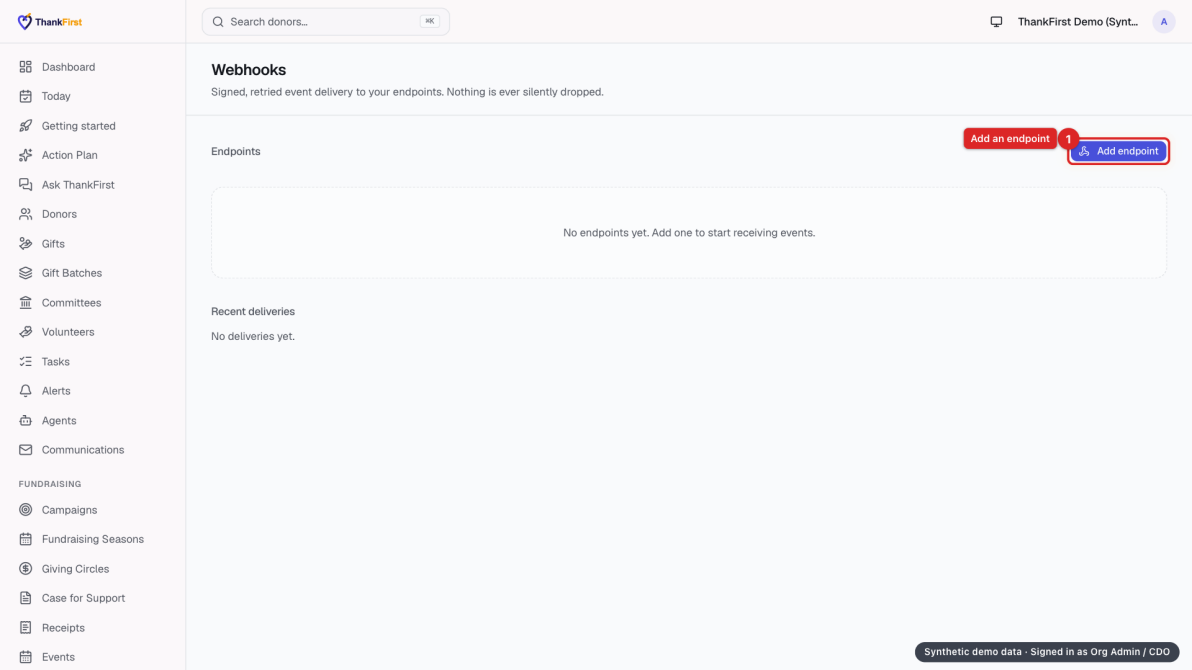
Goal: Let another system use ThankFirst. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Settings**.
   - You'll know you're there: The heading says **Settings**.
3. Click **API keys**.
4. Click **Create key**.
5. Type a **name**.
6. Tick at least one **scope** (required).
7. Click **Create key**. Copy the key now: it's shown only once.
   - Check: **Your new API key** is shown once.
8. To revoke a key, click **Revoke** on its row and confirm.
   - Check: The key shows as revoked.

34.2 Find webhooks

Goal: Notify other systems when things change. **Role needed:** Org Admin. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   - You'll know you're there: The heading at the top says **Dashboard**.
2. In the left sidebar, click **Settings**.
   - You'll know you're there: The heading says **Settings**.
3. Click **Webhooks**.
4. Click **Add endpoint** and enter your URL.
   - **Caution:** ⚠ Shown, not run: no endpoint was created.



W34-1: Add an endpoint

34.3 Recap: where to find it

- **API key:** Dashboard › Settings › API keys › Create key › name, scope › Create key
- **Webhooks:** Settings › Webhooks › Add endpoint

34.4 More about this topic

Who: Org Admin.

- **API keys: Create key**, give it a **Name**, tick at least one scope (Read or Write per resource; otherwise you'll see **Choose at least one scope.**), then **Create key**. **Your new API key** is shown only once: copy it, then click **Done**. Use **Rotate key** or **Revoke key** as needed. (The key is hidden in the video.)
- **Webhooks: Add endpoint** (URL and events), then copy the **Signing secret**. Use **Redeliver** for failed deliveries.

REFERENCE

35. What donors and volunteers see

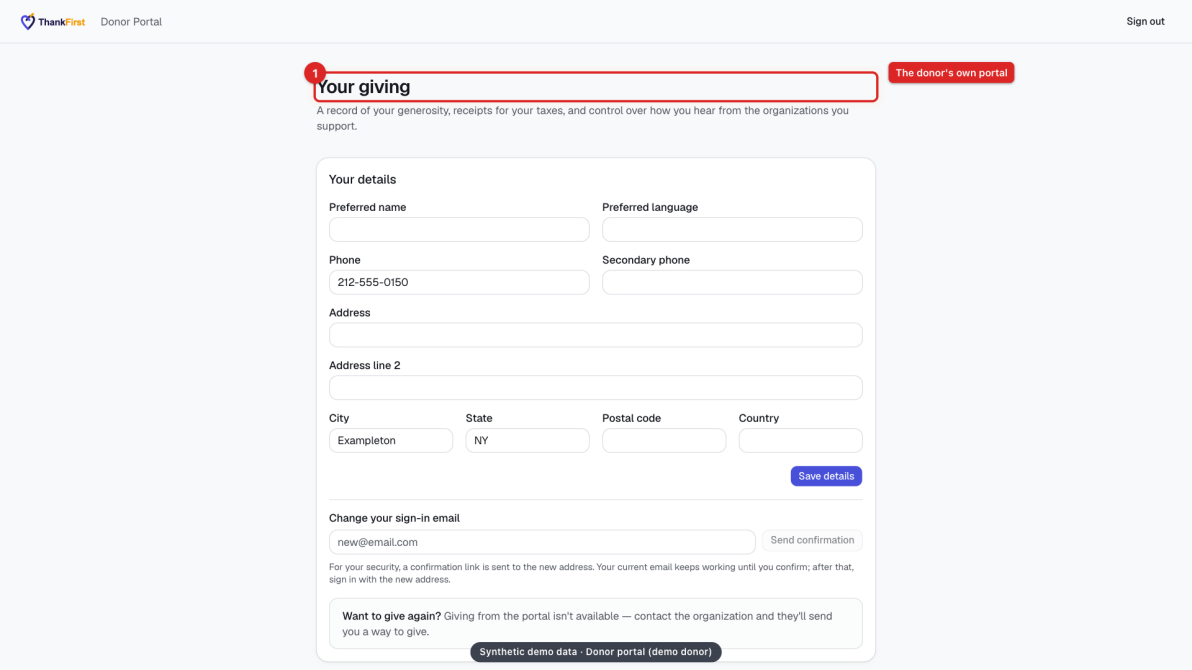
Video chapter 35 starts at 1:04:24.

What donors and volunteers see. These tasks start on public pages, not the Dashboard.

35.1 Sign in to the donor portal

Goal: See giving history and receipts as a donor. **Role needed:** A donor (no staff account). **Starts from:** the donor portal sign-in page.

1. Open your organization's **donor portal** sign-in page.
   – You'll know you're there: The card says **Access your giving** and asks for an email address.
2. Type your **email address**.
3. Click **Email me a sign-in link**.
4. Open the **sign-in link** from your email.
   – Check: The portal shows the donor's giving and receipts.
5. Donors update contact information in **Your details** and click **Save details**; changes are reviewed by staff in **Agents**.



W35-1: The donor's own portal

35.2 Open the public Case for Support

Goal: See the page you share with donors. **Role needed:** Anyone with the link. **Starts from:** the published Case for Support link.

1. Open the **public link** of a published case.
   – You'll know you're there: The page shows the case title.

35.3 Recap: where to find it

- **Donor portal:** portal sign-in page › email › Email me a sign-in link › open the link
- **Public case:** the case's public link

35.4 More about this topic

Donor portal (`/portal`):

- Donors enter their **Email address** and click **Email me a sign-in link**, then open the link from their email **in the same browser**.
- They see their giving, **Tax receipts & statements**, **Your details** and communication preferences.
- Their detail changes come to staff for review (Agents page).
- **Not available to donors:** payment method, monthly giving, and giving again from the portal.

Public pages:

- **Donation page:** only if donations are enabled.
- **Volunteer sign-up** (**Choose a shift**, then **Sign up to volunteer**).
- **Published Case for Support.**
- **Unsubscribe page** (from emails).

36. Troubleshooting and "I don't have access"

Video chapter 36 starts at 1:05:46.

Troubleshooting, and I don't have access.

36.1 Recognize “not in your role”

Goal: Know when a screen is outside your role. **Role needed:** Everyone. **Starts from:** the Dashboard.

1. Start on the **Dashboard**, the first page after you sign in.
   – You'll know you're there: The heading at the top says **Dashboard**.
2. If a page sends you back to the Dashboard, or says **Staff only** or **Admins only**, your role doesn't include it.
   – You'll know you're there: You land back on the **Dashboard**.

36.2 Recap: where to find it

- **No access:** ask your Org Admin › Team & Roles
- **Help:** the manual's troubleshooting table

36.3 More about this topic

You see	Why	What to do
You're sent back to the Dashboard	Your role can't use that page (for example, a Committee Member opening Receipts or Events)	Ask your Org Admin whether your role should change
Staff only	Volunteers, Fundraising Seasons	Ask a staff member
Admins only	Settings sub-pages, Scheduled Reports, API	Ask your Org Admin
"Today is for staff and committee members."	You're a Board Viewer	Use the Dashboard
Only admins can share a view with the whole team.	Sharing is admin-only	Save the view for yourself
Only admins can run bulk updates.	Bulk edit is admin-only	Ask an admin
Sent to Billing with no message	The feature isn't in your plan	Ask your Org Admin about upgrading
"Email delivery isn't configured…" / "Outbound donor email is turned off…"	Email isn't enabled	Org Admin: chapter 24 or 29
A donor or task says **Donor not visible to you**	The donor is outside your committee scope	Ask staff to assign the donor
This changed since you opened it.	Someone else updated the item	Reload the page
Invitation errors	See 2.1	—

Glossary

Term	Meaning
Org Admin / CDO, Development Associate, Committee Chair, Committee Member, Board Viewer	The five organization roles (chapter 1)
Chair, Board Liaison, Staff Lead, Member	Committee roles, within one committee (chapter 1.2)
Category	First-Time, Returning (TYBNTY: gave last year and this year), At Risk (LYBNTY: gave last year but not yet this year), Recurring, Major Donor, Planned Giving, Lapsed; also Prospect and Active Donor
Tier	Operational priority tier (Auto-tier uses lifetime giving)
Pipeline stage	Where the donor is, from Unengaged to Reassessment (chapter 8.3)
Thank-you ratio	Thank-yous recorded compared with asks
OK to ask	Whether stewardship rules currently allow an ask
Stewardship touch	A logged thank-you or neutral contact
Recorded vs reported	Recorded means entered in ThankFirst. Reported means imported history
Saved view	A named set of filters and columns
Audit log	The admin record of sensitive actions (exports, overrides, merges)
Gift batch	A grid for entering many gifts at once, committed together
Giving circle	A membership-giving group with a cap, an annual amount and renewals
Case for Support	A shareable document explaining why to give
Household	A group of related donors with shared salutation and giving totals

Appendix: known limitations and workarounds

1. **Team & Roles and Settings show an error when saving.** If **Invite**, changing a role, removing a member, revoking an invitation, **Save settings**, **Save timezone** or turning on outbound email shows an error, the change wasn't saved. Contact ThankFirst support. Accepting an invitation works normally.
2. **Two-factor sign-in.** If, after turning on two-factor, signing in shows a **Continue to ThankFirst** page that keeps returning to itself instead of asking for your code, contact ThankFirst support. Before requiring two-factor for your whole team, have one person turn it on, sign out and sign back in to confirm the code prompt appears.
3. **Committee charter edits by a volunteer chair. Save charter** shows **Charter updated.** but the change isn't kept when a volunteer Committee Chair makes it. Ask your staff lead to update the charter.
4. **Duplicate reviews from Today.** "Review possible duplicate" opens the Donors list rather than the merge screen. Start merges from the donor's profile (chapter 11).
5. **Trial donor limit.** New trial organizations can hold up to 2,500 donors. Check your limit on the Billing page (chapter 31).
6. **Removing a member** happens straight away, without a confirmation step, so check the name before you click. You can't change or remove your own row, so an organization always keeps its admin.
7. **Help & Guides** appears in the sidebar for Org Admins only.
8. **Features outside your plan** send you to the Billing page without an explanation, and the sidebar still lists them. If a page takes you to Billing, the feature isn't in your plan.
9. **Screen readers and the Case for Support editor.** The ten section boxes have visible headings but screen readers announce them without names. Use the visible headings to tell the boxes apart.
10. **Features that depend on your setup.** Communications, online donations, AI features, scheduled-report delivery, and API keys and webhooks depend on your organization's setup and plan. If one isn't available, ask your Org Admin or ThankFirst support.

Appendix: Feature finder

Where each workflow is shown in the training video and described in this manual.

#	Feature / workflow	Roles	Video chapter	Video timestamp	Manual section	Availability
1	Organization roles vs committee roles	all	1	0:58	1.1	
2	Accept invitation	invitee	2	2:50	2.1	
3	Two-factor gate / enroll / challenge	all	2	3:42	2.2	See known limitations
4	Sign up + create organization (onboarding)	new admin	2	—	2	
5	Staff login / sign out	all	2	3:21	2	
6	Sidebar, command palette, theme, org switcher, user menu	all	3	4:47	3.1	
7	Help & Guides / help articles	Org Admin link only	3	4:47	3.1	See known limitations
8	Donor categories glossary	all	3	5:54	3.3	
9	Getting started (launch readiness)	staff; Board Viewer read-only	4	6:35	4.1	
10	Donors list: search, filters, columns	all (scoped)	5	7:44	5.1	
11	Saved views (save, update, delete, share)	all; share=admin	6	9:40	6.1	
12	CSV export (donors, gifts)	all (scoped)	6	10:34	6.2	
13	Scheduled Reports	Org Admin	6	11:02	6.3	Depends on your organization's setup
14	Add donor	Admin, Dev Associate	7	11:59	7.1	
15	Import wizard incl. presets (DonorPerfect, Bloomerang, LGL)	Admin, Dev Associate	7	13:57	7.2	
16	Donor profile tour	all (scoped; BV read-only)	8	17:39	8.1	
17	Edit donor + contact preferences + custom fields	staff	8	17:39	8.1	
18	Pipeline stage, next action, relationship owner	staff; committee in scope	8	18:32	8.2	
19	Attachments	staff	8	17:39	8.1	
20	Mark / un-mark deceased	staff	8	19:20	8.3	
21	Delete donor	staff	8	—	8	
22	Log gift (cash, in-kind, pledge installment, tribute, recurring)	staff	9	20:46	9.1	
23	Log interaction + stewardship override	staff; committee in scope	9	21:44	9.2	
24	Personalized ask link	staff	32	—	32	Depends on your organization's setup
25	Households	staff	10	24:05	10.1	
26	Relationships	staff	10	25:03	10.2	
27	Flag duplicate	Dev Associate	11	26:31	11.1	
28	Merge duplicates	Org Admin	11	27:22	11.2	

#	Feature / workflow	Roles	Video chapter	Video timestamp	Manual section	Availability
29	Bulk edit + undo; auto-tier	Org Admin	11	28:35	11.3	
30	Today (all actions, dismiss, undo, bulk accept)	staff + committee roles	12	29:37	12.1	
31	Tasks (create, filter, complete, cancel, reopen, history)	all	13	32:08	13.1	
32	Action Plan (create tasks per group)	Admin, Dev Associate	14	34:17	14.1	
33	Dashboard / Board Dashboard	all	15	35:31	15.1	
34	Alerts	all	15	35:57	15.2	
35	Gifts list	all	16	36:42	16.1	
36	Gift batches (draft, commit, unattributed)	Admin, Dev Associate	16	37:06	16.2	
37	Receipts & statements, issue/void/reissue, year-end bulk, print	not Committee Member	17	38:49	17.1	
38	Campaigns + gift pyramid + pledges	view all; create staff	18	40:10	18.1	
39	Giving circles + enroll	view all; create staff	19	41:36	19.1	
40	Events + RSVPs + check-in	not Committee Member	20	42:32	20.1	
41	Volunteers: opportunities, shifts, public sign-up, check-in, hours	Admin, Dev Associate	21	43:51	21.1	
42	Case for Support builder + publish	view all; build staff	22	45:15	22.1	
43	Fundraising seasons	Admin, Dev Associate	23	46:19	23.1	
44	Email a donor (composer)	staff	24	47:14	24.1	Depends on your organization's setup
45	Audience send + message log	staff (menu)	24	47:43	24.2	Depends on your organization's setup
46	Committees: create from template, charter, roster/committee roles, compliance	see manual 25	25	48:40	25.1	See known limitations
47	Committee donor assignments	Admin, Dev Associate	25	49:56	25.3	
48	Committee meetings + minutes + monthly reports	staff or committee Chair	25	49:56	25.3	
49	Committee member/chair experience (scope, coaching)	Committee roles	26	50:59	26.1	
50	Board Packet (+ Export PDF)	not Committee Member	27	53:08	27.2	
51	Team & Roles: invite, roles, remove, pending invites	Org Admin	28	54:00	28.1	See known limitations
52	Organization settings form, timezone, outbound email switch	Org Admin	29	55:34	29.1	See known limitations
53	Security (2FA)	Org Admin (UI)	29	56:21	29.2	See known limitations
54	Audit log	Org Admin	29	56:45	29.3	
55	Export all data	Org Admin	29	57:09	29	
56	Funds & receipt legal details	Org Admin	30	57:34	30.1	
57	Custom fields + acquisition sources	Org Admin	30	58:58	30.3	
58	Billing & plan	Org Admin	31	59:49	31.1	

#	Feature / workflow	Roles	Video chapter	Video timestamp	Manual section	Availability
59	Donations & payments (Stripe Connect)	Org Admin	32	1:00:42	32.1	Depends on your organization's setup
60	Public donation page + thanks	public	32	—	32	Depends on your organization's setup
61	Ask ThankFirst	all (plan ai)	33	1:01:41	33.1	Depends on your organization's setup
62	Agents review queue (donor change requests)	staff (menu)	35	1:05:07	35	
63	AI agents settings, kill switch, AI key, prospect research	Org Admin	33	1:02:07	33.2	Depends on your organization's setup
64	Prospect research brief	staff	33	—	33	Depends on your organization's setup
65	API keys	Org Admin (plan api)	34	1:02:55	34.1	
66	Webhooks	Org Admin (plan api)	34	1:03:49	34.2	Depends on your organization's setup
67	Donor portal: sign-in, giving, receipts, details, preferences, email change	donors	35	1:04:33	35.1	
68	Portal card update	donors	35	—	35	Depends on your organization's setup
69	Volunteer public sign-up, thanks, cancel	public	35	1:05:28	35	
70	Published Case for Support	public	35	1:05:18	35.2	
71	Unsubscribe page	public (from email)	35	—	35	Depends on your organization's setup
72	Access denials and troubleshooting	all	36	1:05:51	36.1	