# Acts 435

# Advocate's Control Panel

**http://advocates.acts435.org.uk**

# Training Manual

# Contents


| | | Page |
|---|---|---|
| 1. | Access | 3 |
| 2. | The Dashboard | 4 |
| 3. | Add Request | 5 |
| 4. | Managing Requests | 7 |
| 5. | Export Requests | 8 |
| 6. | Tracking Payments | 9 |
| 7. | Feedback | 10 |
| 8. | Resources | 12 |
| 9. | Account | 13 |


If you experience any problems with the Advocate's Control Panel, please contact Acts 435 at admin@acts435.org.uk

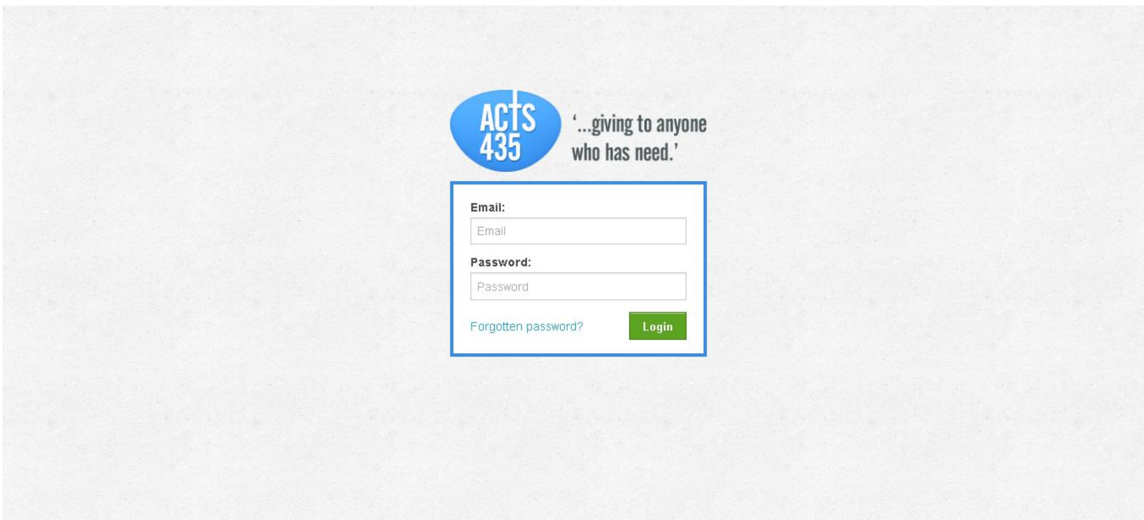
Please note: the Acts 435 Management is continually trying to improve the Advocate's Control Panel and so at the time of use, there may be some minor changes to the screen shots displayed in this training manual.

# 1. Access

To access the Advocate's Control Panel, where you will manage all applicant requests, and which will allow you to post onto the Acts 435 website, you need the following web address:

http://advocates.acts435.org.uk

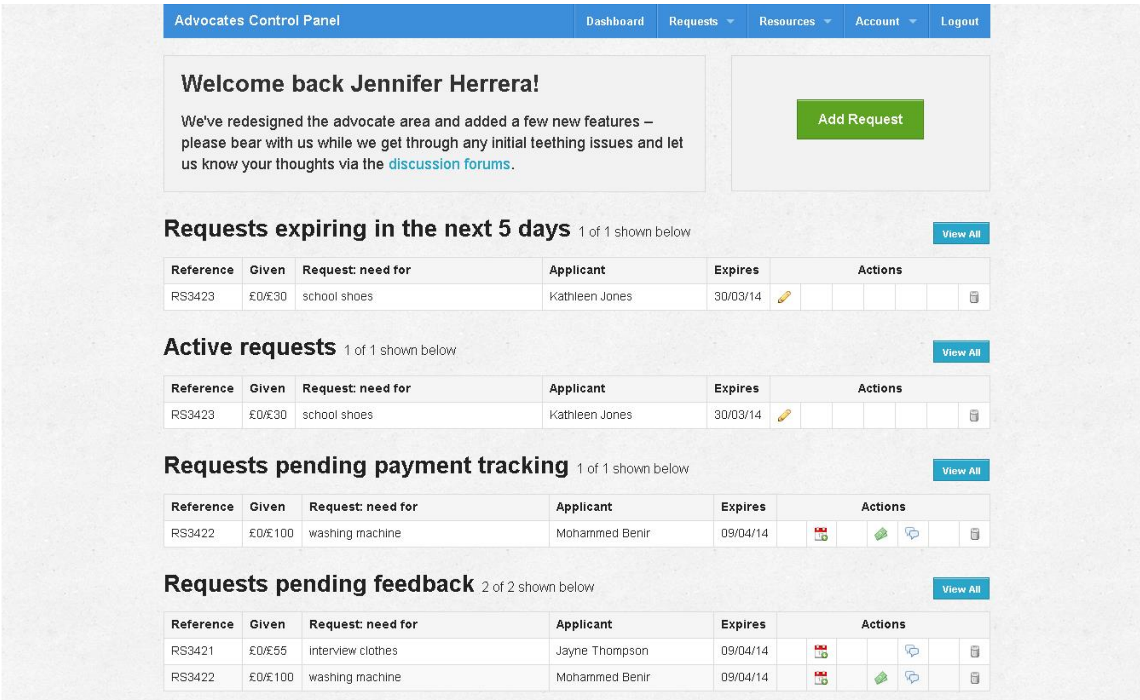
This will bring up the login page:




Use the email address you registered with Acts 435 and the password given to you by the Administrator to log in. If you have forgotten your password, you can click on 'Forgotten your password' where you will be asked to enter your email address and a new password will be sent to that email address.

# 2. The Dashboard

When you log in successfully, you will be taken to the **Dashboard:**



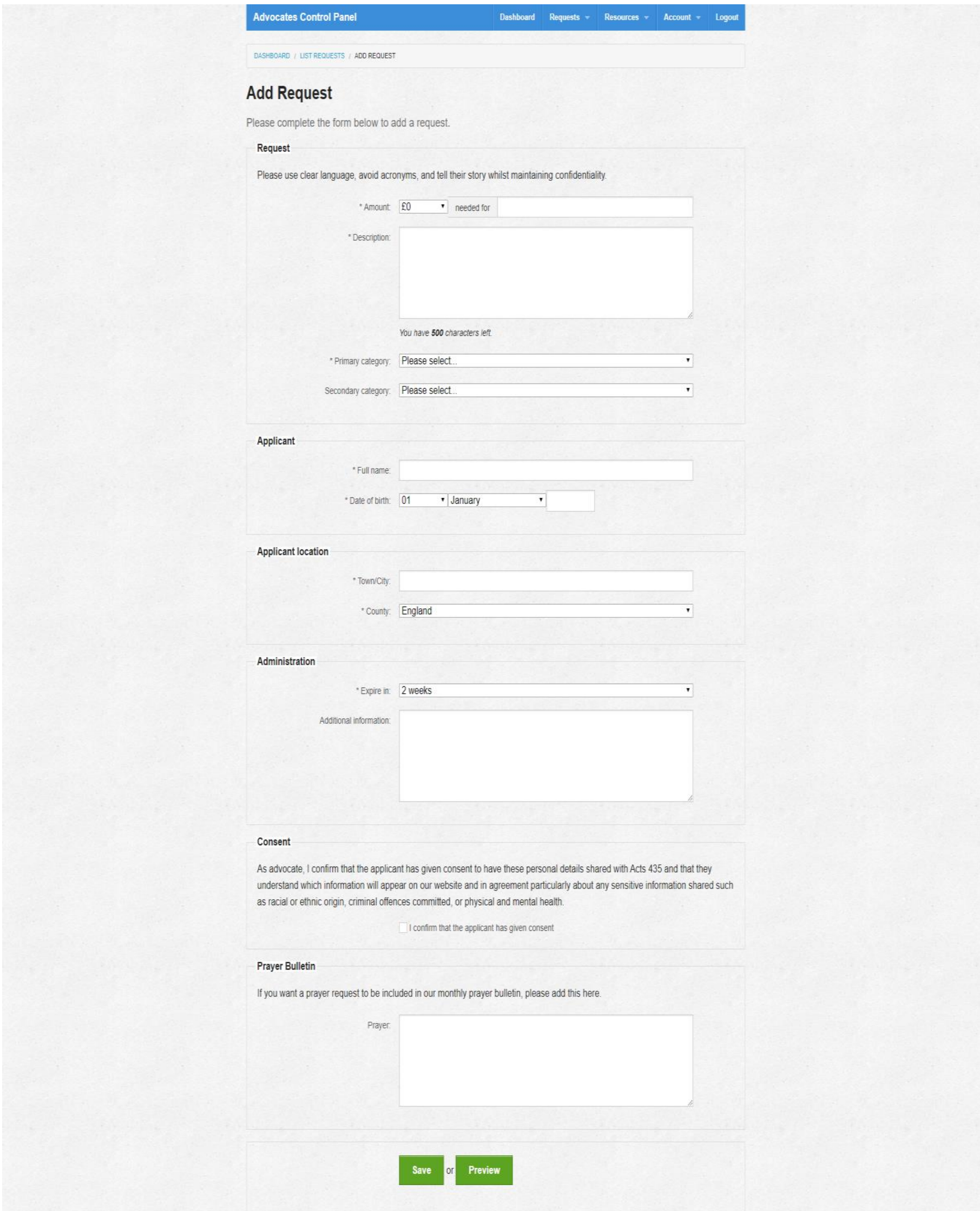

This gives you a snapshot picture of your requests – in the example above the only category missing is 'expired requests' that will appear above the 'active' ones so that you are first alerted to these. You can choose to enter into each request by clicking on the relevant icon. The pencil logo at the right hand side of each active request enables you to go in and edit it. The calendar icon automatically allows you to extend the request by another 2 weeks. Clicking on the bin icon will delete the request.

The dollar icon allows you to manage the payment aspect of each request and the speech bubbles the feedback. Once a request has been part-funded, there is also a column where a green arrow will appear, allowing you to process that request early if you choose.

Think of this screen just like a car dashboard – you have everything set out in front of you and now you can choose what to do, whether it be posting feedback, editing a request or just being aware that you have a request that is soon going to expire.

# 3. Add Request

You will see along the top of your Advocate's Control Panel a number of tabs which you can click on.  From left to right you have the Dashboard first, and then **Requests.**  Click on this and you will have a drop down menu to choose '**Add Request'.**



Here you can enter all the different fields for a request. Complete each applicable field. Compulsory fields are:

- Amount
- Needed for (item, eg. a bed, school uniform)
- Description (full explanation of why the person needs the item)
- Primary category
- Name
- Age
- City and County (so it appears correctly in filters by region)

The ‘Additional Information’ box is for your internal use if you want to store applicant contact details for your own use, or perhaps the name of who referred the applicant to you. It can also be left blank.

There is also the option to add a prayer request for the applicant if you wish. This may go into the following month’s prayer bulletin which goes out to people who have specifically asked to receive it. (Please note we can usually only select a sample of prayer requests to include.)

You need to tick to confirm you have obtained the necessary consent from the applicant about having this information on our website and held on our records. This is VERY IMPORTANT.

Click on **Preview** to check all the information then when you press **Save** the request will go live onto the website. Make sure no personal details of the beneficiary appear in this section of the request. Once you have posted it, you can go back into the request to edit it if required.

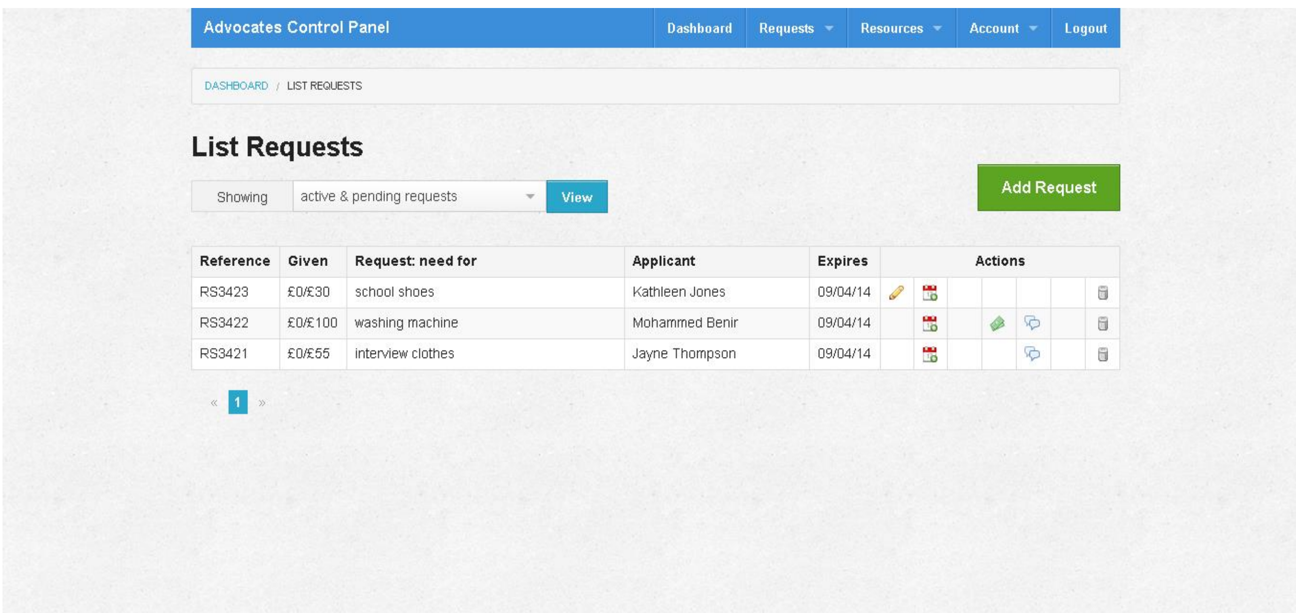
**Please note: the only category you cannot change is the amount so make sure that is right first time.** This is because once you Save the request it is posted on the website and editing the amount would cause complications if a donor at that same moment is making a donation to your request. If the amount needed changes, you will need to delete the request and start again.

When your request is live, a PDF icon will appear. This enables you to generate the Applicant Form with all the details already filled in to print and get your applicant to sign. This works really well for those who tend to load up their requests straight onto the computer and then fill in the form afterwards. For those who fill in a paper form first (usually because they meet with the applicant away from a computer) they will then use this information to complete the ‘Add Request’ fields. We have no preference as to which way you do this – whatever works best for you (a copy of the paper form can be found in the Documents section).

# 4. Managing Requests

To manage your requests and see them all listed in reference number order, you should go to the **Requests** tab**.** Click on this and you will have a drop-down menu to choose '**List Requests'.** It is automatically set to show 'active and pending' requests (both those pending payment and those pending feedback). Above the listing there is a drop-down menu to enable you to choose which requests you would like to see if you wish to filter them to a particular grouping. **Please note: you can only have FIVE LIVE (active) requests at any one time.**

You can also see what stage the request is at by the icons visible – just the speech bubbles indicate you only need to post feedback before it will become archived. The dollar icon and speech bubbles indicate both the payment details and the feedback need to be done.



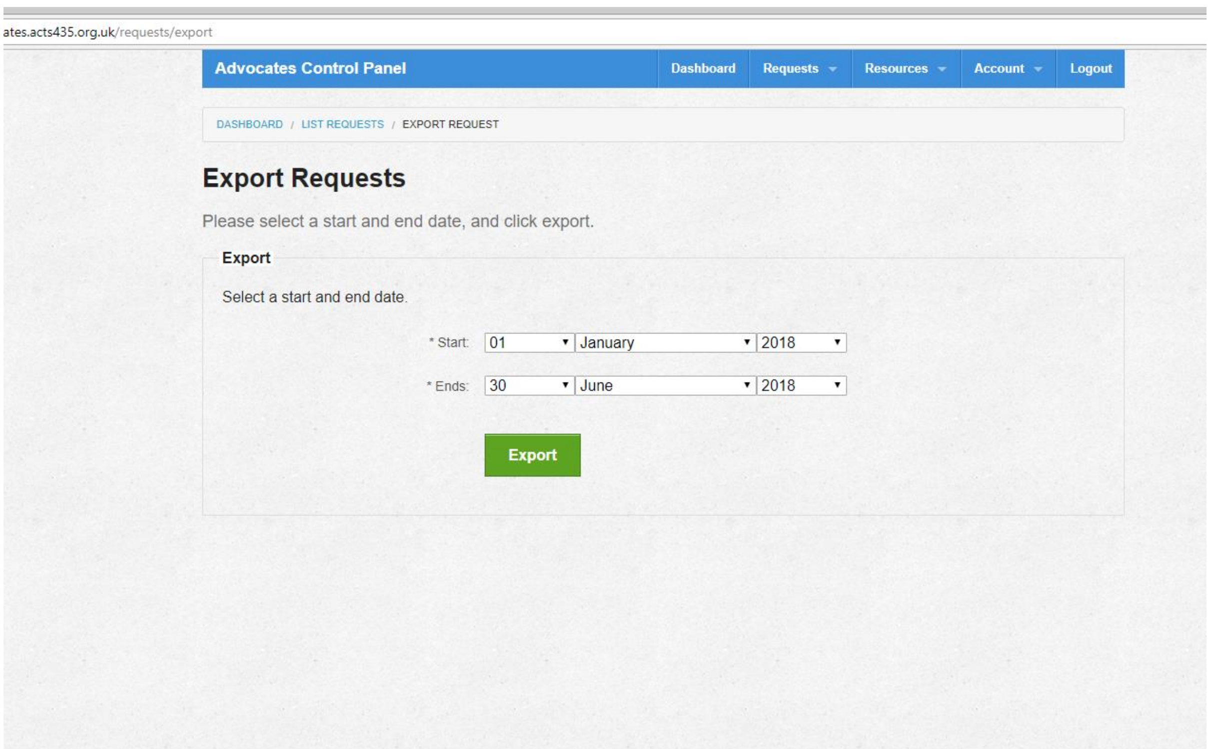

It is **very important** that you do not leave the requests in the pending section. The Track Payments and Feedback sections are two important stages that you need to follow to archive the request and finish the process.

You can do a few at once, however, as there is no particular deadline for when this information must be completed, especially as we understand sometimes there is a delay in purchasing an item/contacting an applicant once the money has been raised.

## 5. Export Requests

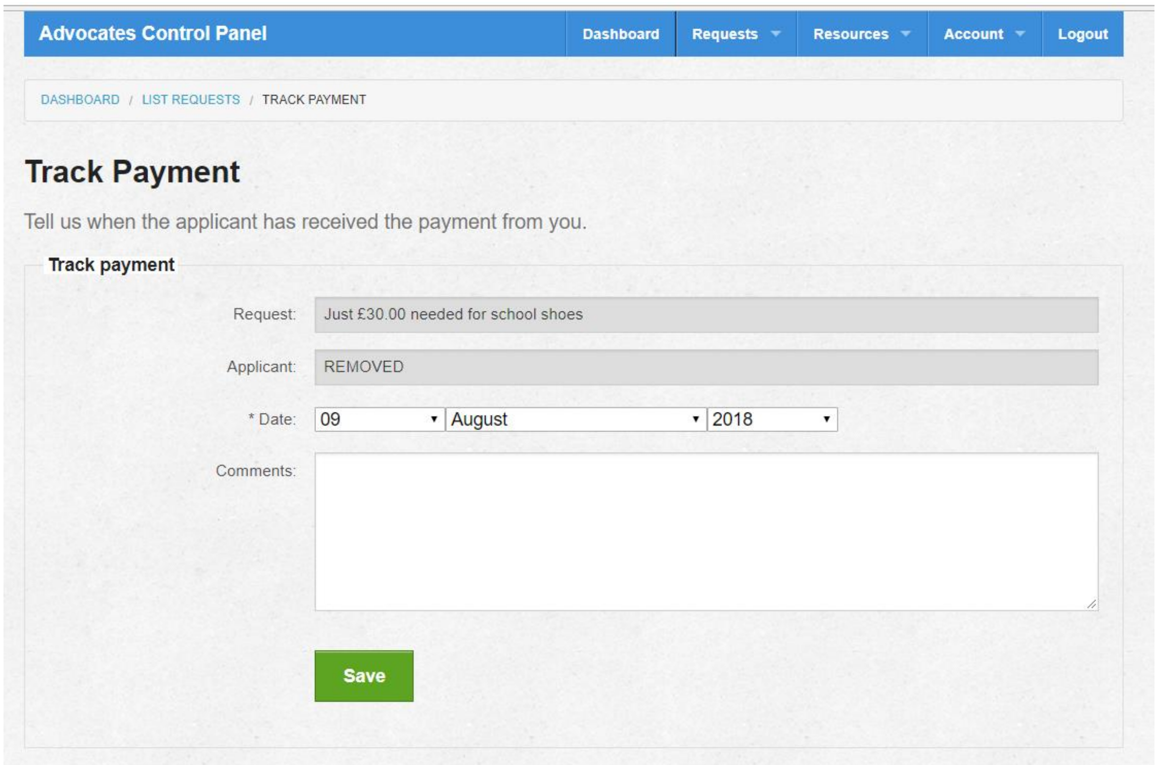
**Export Requests** allows you to download into Microsoft Excel a summary of requests you have posted in a certain time period. This can be particularly helpful for any year-end reports such as financial statements and annual report as you can see how much you have received from Acts 435 and on what dates.

Simply select the start and end date of requests you have posted and click Export. This will automatically download the Excel report which you can click on at the bottom left hand corner of your screen and then analyse as suits your requirements.



# 6. Tracking Payments

Once a donation has been received for the request posted on the website, two things immediately happen; (i) the request disappears from the Acts 435 website, and (ii) the request moves into **Pending** on the Advocate's Control Panel. For each request you need to record the date you then gave the money/item to the applicant. This is done by clicking on the dollar icon which will take you to the following page:



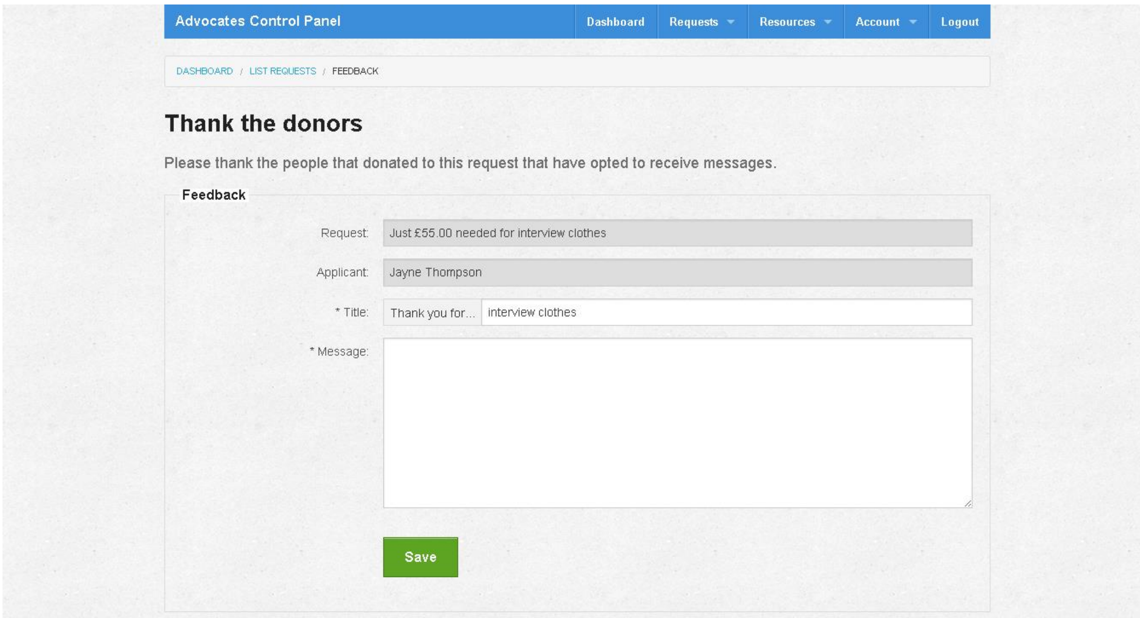

The request and applicant name appear and you need to simply input the date you gave the money/item to the beneficiary. There is a comments box – this is purely for your internal use.

Once you have done this click save and you will be taken back to the listing of requests.

# 7. Feedback

We cannot emphasise enough how **important** good **Feedback** is for the success of Acts 435. The thank you message to donors is a key way to encourage repeat giving.

Clicking on the speech bubble icon takes you to the following screen:




The Thank you message to donors is automatically populated with the title with what you are thanking them for (though the actual item can be edited if you want it to say something different – eg. ‘thank you for helping me’, ‘thank you for helping me get my job’, etc.)

Imagine seeing the donors and how you would thank them. You can write it from your perspective as advocate, direct from the applicant (eg. you could reproduce a thank you card they might have given), or a comment from a relevant referrer, eg. support worker.

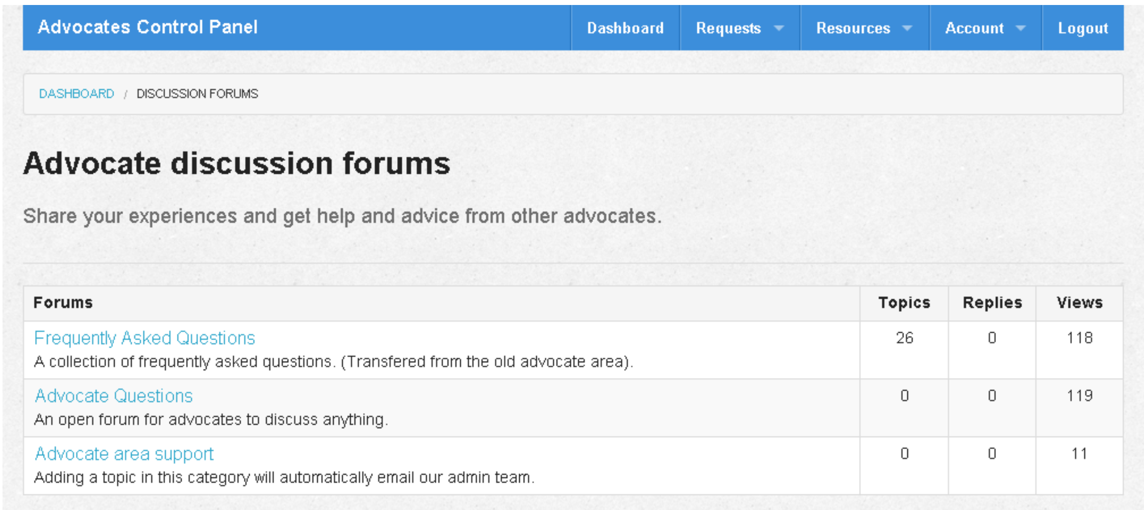
These currently go to be edited by Acts 435 Head Office to correct any typos etc. before going out to the donors.

Once you click ‘save’, your request will be archived.

If you save and archive your request, but need to make a change to the Thank You message, you can email the Acts 435 Admin team with the change you require (though ideally this should be done that same day). This can then be updated by the Administrator for the website.

# 8. Resources

The next tab at the right-hand side of the Advocate's Control Panel is entitled **Resources.** Under here you have 3 options: **Forums, Documents** and **Links**, all resources and information that we hope you will find useful.




Clicking on 'Forums' takes you to the screen above. From here you can select **Frequently Asked Questions, Advocate Questions** or **Advocate area support** and read the information there or post something new**.**

The difference between each are basically as follows:

- FAQs will normally be posted by Acts 435 Management to cover common questions. This is the best place to check for information before you post your own question
- Advocate questions are designed to be raised by an advocate to other advocates – what we hope will be a great resource for you as practitioners
- Advocate area support provides you with a way of posting a question that then alerts the Acts 435 Admin team to the issue you are experiencing.

Going back to the **Resources** menu you can click on **Documents** which has a variety of useful documents for you to access. The **Guidelines for Advocates** is attached here, as is the **Application Form** to be used with applicants. Again from the **Resources** menu you can click on **Links** which has some useful **website links** listed. Do let us know if you have any more links or documents that you think would be useful.

# 9. Account

The final menu is entitled **Account.** When you first access your account this will hold the basic details that Acts 435 holds about you and about your church/charity.

- Click on **Your Details** to change your personal details – name, email, telephone number, address. (If you change Advocate, please inform us rather than simply updating the details here as the new Advocate will need to sign an Advocate Commitment.)
- Click on **Your Organisation** to change the details of your church or charity – address, telephone number, email, website – and feel free to add a description too which goes onto our website where your church is listed.
- You can change **Your Password** here