Organization Settings

Adjusting Organization Settings and Defaults · https://ivolunteer.com/support-docs/organization-settings/

The **Organization Settings** section allows you to set a variety of default settings for your Organization's ivolunteer.com account. On the sub-tabs you will find settings for **Display/Layout, Emails, Database, Date and Time Settings, Logo, Colors,** and **Analytics** on your home pages. The **Save** button allows you to save any settings that you change. The **Revert** button reverts all your changes to the original system settings.

Display/Layout Tab: On this tab you can set what terminology your organization uses by default and select what appears around your organization's home page(s).

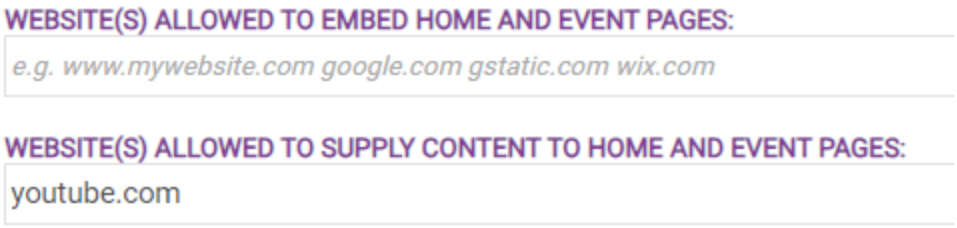
Organization & Database: Under this heading you can select the terminology, or what your participants do and are called. Since ivolunteer.com deals primarily with volunteer scheduling, your default participant actions will be “Volunteer, Volunteered, Volunteering” and your default participant title will be “Volunteer." These terms come into play when using variables in the Rich Text Editors. Whenever you see or use [SCHEDULE], [SCHEDULED],[SCHEDULING], or [PARTICIPANT_TITLE] used in your emails, in the Top Instructions of your Event, on your Home Pages, etc., that is where your terminology of choice will be used. You may need to change the wording in your emails or in the instructions if you find the terminology you chose to use does not work well with the original templates.

In this section you can also enter websites that are allowed to:

- embed your ivolunteer.com home and event pages in frames -- for example, if you want to embed a signup sheet in your organization's main website.
- embed external content such as videos in ivolunteer.com rich text fields.



Note: Include only the primary website url in the allowed list. When you embed a YouTube video in a rich text field, you must use the frameset embed code provided by YouTube with the URL format https://www.youtube.com/embed/...



Layout: Under this heading you can select what appears around the organization home pages. Just check or uncheck the boxes next to the features you would like to have on your home page.

Note: Unchecking the Header option will remove the text in the upper right hand corner that enables you to log into Administration from the home page or to select Kiosk Mode.

- **Emails:** Email sent from your account will have a sending address of myorganization@ivolunteer.com or myorganization.some_event@ivolunteer.com. Any replies or bounce-back messages received by those addresses may be forwarded to your administrator(s) and/or event contact(s). Under the Administrators tab you can specify the type of email individual administrators will receive.
- **Database:** On this tab you can select options for database fields representing information saved in the Database for each participant. Premium subscribers also have the option to add up to 10 custom database fields.
- **Date/Time:** On this tab you can adjust your organization's Date and Time settings, such as the Preferred Date format, Time Format, and Time Zone as well as the Input Date and Report Date formats. You can also choose your preferred currency format.
- **Languages (under Date/Time):** Core texts on the Home, Event and Participant pages can be displayed in the languages offered in the menu under this heading. It is up to you to translate any of the customizable Settings under Layout, Info Messages, and Emails. Administrative mode always displays in English. If you are interested in translating the core texts into other languages, please contact support. Currently the languages supported are English and Danish, as well as the option to Detect from Browser (with English being the fall-back language).
- **Logo:** In this tab, you can set a Logo for your Organization. When you set a logo here, then you can use the variable [ORGANIZATION_LOGO] to have that logo appear anywhere on your Home Pages or your Events. Then, when you change the logo in this tab, anywhere that the [ORGANIZATION_LOGO] appears will also change to match the image set here.

To set your Logo:

- Click on **Set Logo...**
- Input the URL of the image you would like to use, or click the **Select...** button.
- If you click on **Select...** you can upload an image to your Organization's media library to use as your logo, or you can choose an image you have previously uploaded. After choosing your image, click on the **Select** button to the right of the image description.
- After you have input the image URL or selected your image from your library, then you can choose your dimensions. You also can change the dimensions of your logo if you find it is too large or too small. (Note that upward scaling of an image from its actual size will cause a loss in display quality.) You can choose to change both width and height, just width, or just height.
- When you are ready to set your Logo, click **OK.**

- **Colors:** Here you can choose a color scheme for your Organization from any of our preset color schemes. The three colors on the left-hand side are the main colors of your organization, and the three on the right-hand side are the colors used in the Signup Sheet when slots are Free, becoming Filled, or completely Full. To save your color scheme, choose the one you would like to use and press the **Save** button. Always make sure to save any changes that you make to your settings.
- **Analytics:** If you have a Google Analytics account, this tab allows you to add your Google Analytics tracking ID to track your ivolunteer Home page and Event pages. Your Analytics settings apply to all existing and new events. To track your ivolunteer Home page, first add the URL of your home page into your Google Analytics account. It will look something like “myorganization.ivolunteer.com”. Then paste your Google Analytics Tracking ID into the field on this page.
- **Payments:** Premium accounts also will include options for taking payments through PayPal and/or Stripe.

  To accept payments into your **PayPal** account, it must first be a business account. Then you will need to log in to that account, navigate to the API Permissions screen, and grant ivolunteer permission to process and refund payments. Follow these steps:
  - Log into your business PayPal account.

- Navigate to **Gear Icon** > **Account Settings** > **API Access** > **Pre-Built Payment Solution** > **Add API User button**.
- Add the API username **paypal_api1.79ware.com** and grant it permission to: **Use Express Checkout to process payments**, **Issue a refund for a specific transaction**, **Process your customers credit or debit card payments**, **Authorize and capture your PayPal transactions**.
- If you intend to make Test payments, repeat those steps for your PayPal sandbox account, granting **paypal-test-business_api1.79ware.com** the same permissions to it.



Note: The **Colors** and **Analytics** options under **Organization Settings** apply to both new and existing events. Other default settings are applied only to new events.