rallyhood®

User Guide for Rallyhood Admins and Members

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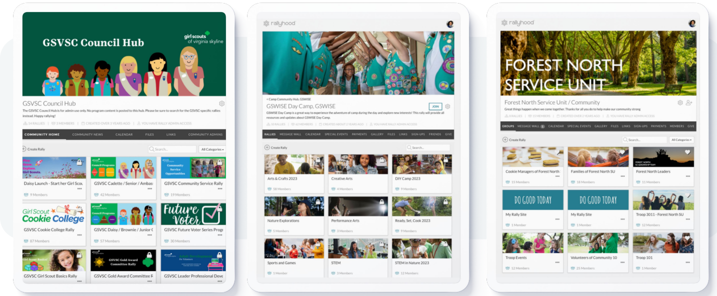
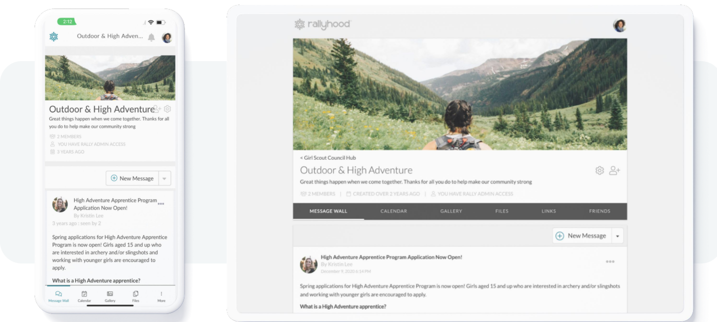
The Rallyhood Platform Hierarchy



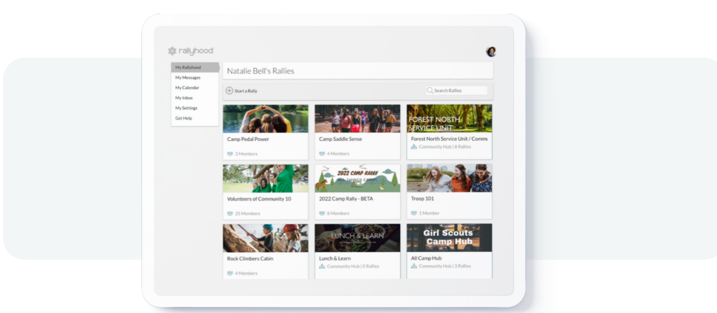
1 Hubs

Hubs enable Admins to organize and manage Rallies that relate to one another, all under one umbrella



2 Rallies

Micro-sites for groups with a suite of collaboration tools



3 "My Rallyhood" Dashboard

Aggregates of all the Hubs and Rallies relevant to the individual user

The Rallyhood Platform Hierarchy

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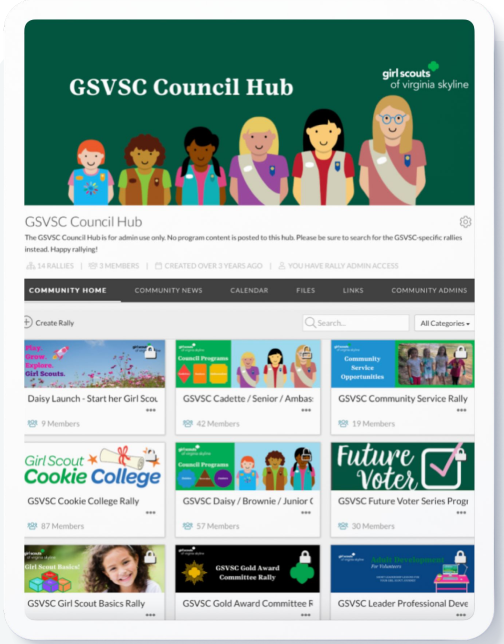

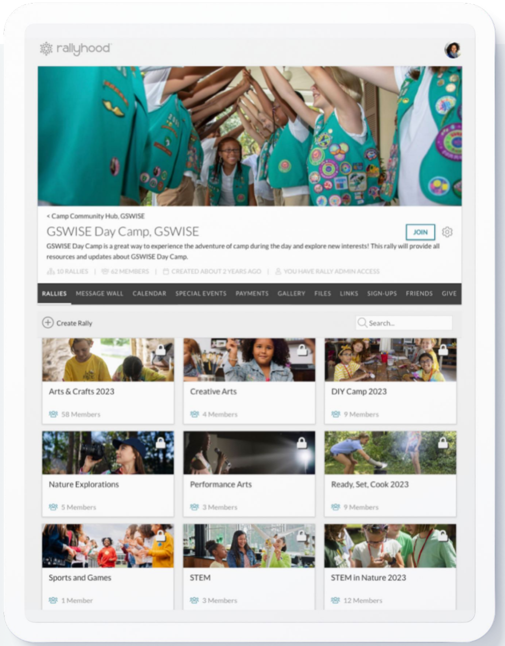

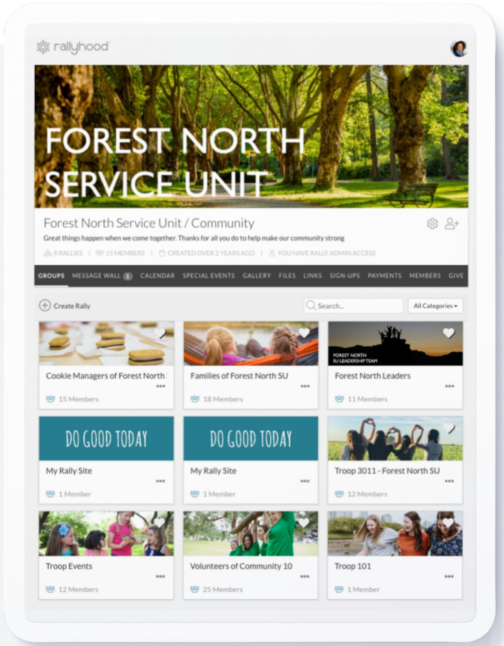

1 Hubs

Hubs enable Admins to organize and manage Rallies that relate to one another, all under one umbrella

The Rallyhood Platform Hierarchy

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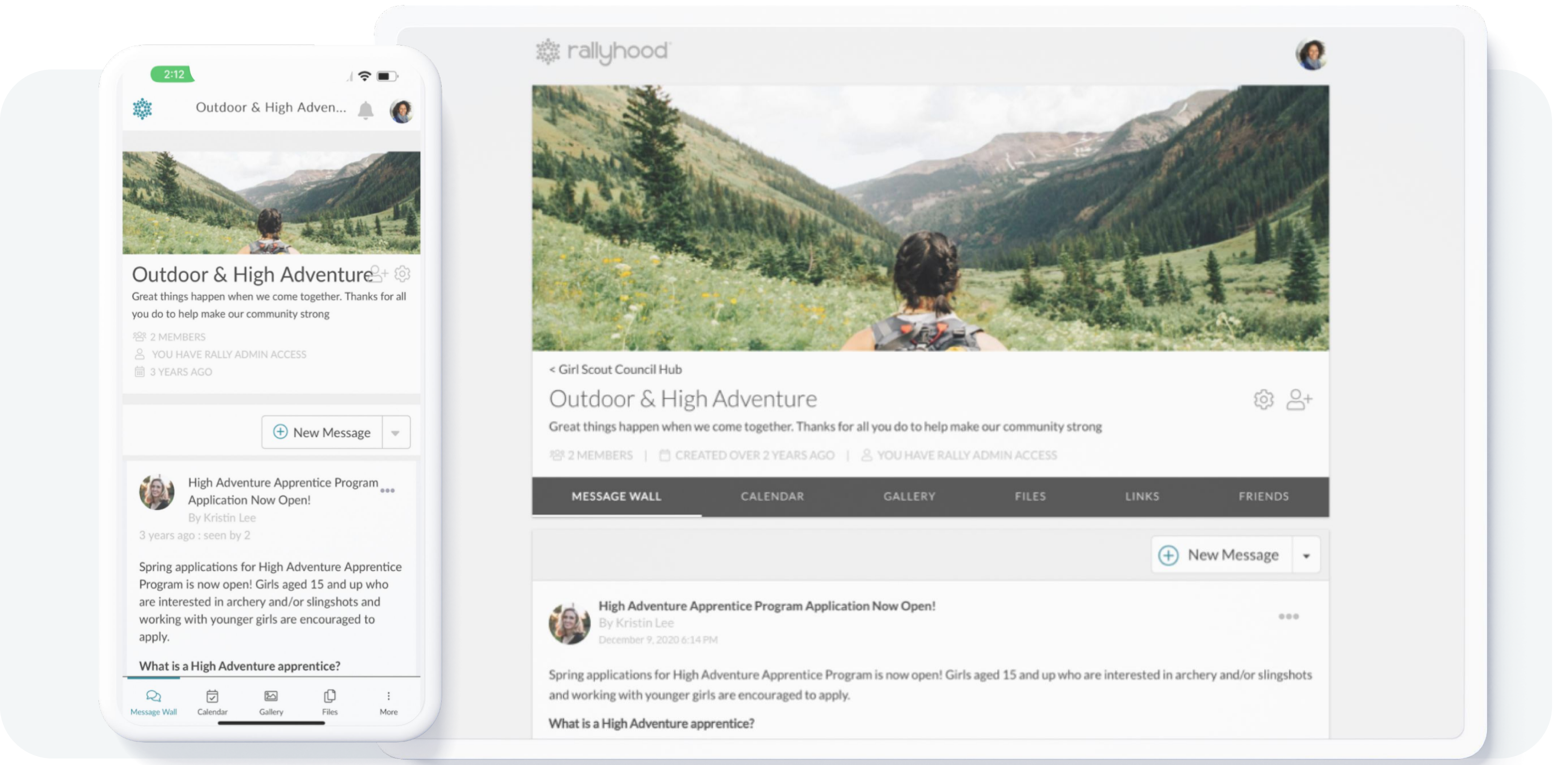
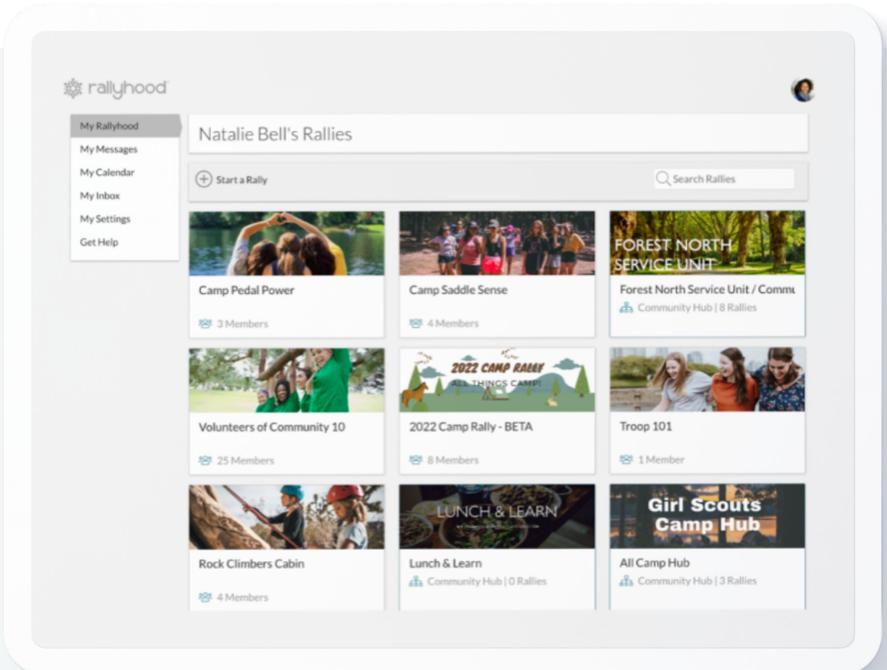


2 Rallies

Micro-sites for groups with a suite of collaboration tools

The Rallyhood Platform Hierarchy



3 "My Rallyhood" Dashboard

Aggregates of all the Hubs and Rallies relevant to the individual user

rallyhood®

User Dashboard

My Rallyhood Dashboard

View Demo

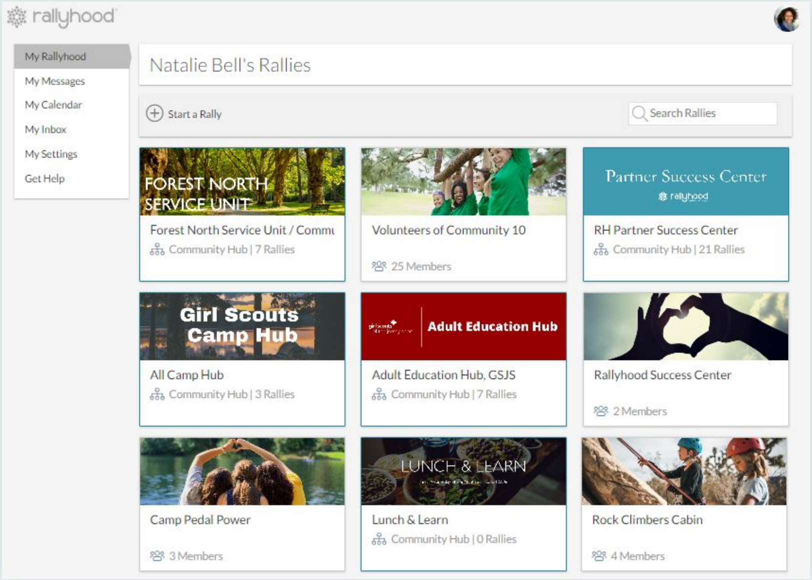
When you log into Rallyhood, you will see your Dashboard — also known as **My Rallyhood.**

Your **My Rallyhood Dashboard** is where all of your groups and their respective Hubs and Rallies come together in one place, making it easy to find the information relevant to you.

The **My Rallyhood Dashboard** is a personalized experience for every user. Each tile represents a Hub or Rally that you have been invited to or opted to join.

Each tile will display either the **"Hub"** icon or the **"Rally"** icon to give users an indication of what they will find when they click on the tile.

The **My Rallyhood Dashboard** can be customized by dragging and dropping Hubs and Rallies into an order to prioritize them in a way that suits individual needs.



My Rallyhood Dashboard

View Demo

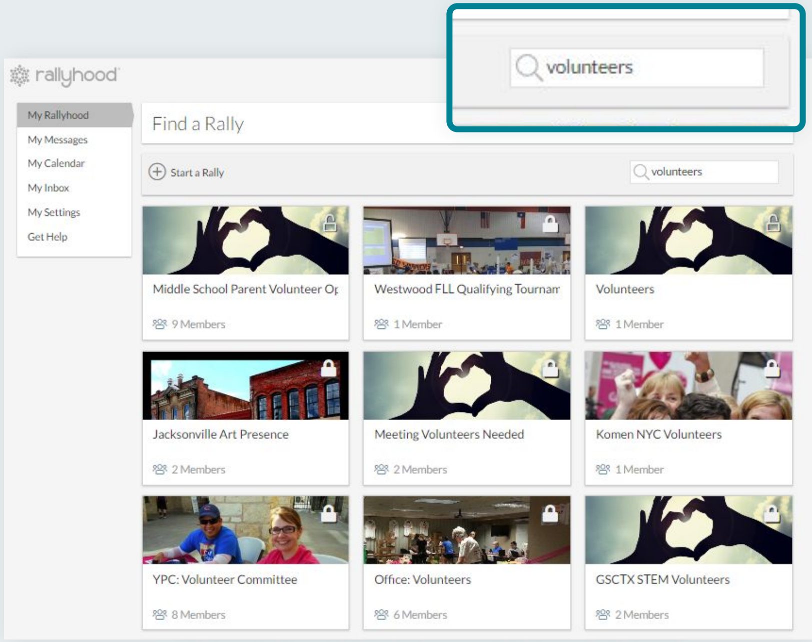
At the top right of the Dashboard is **"Search Rallies."**

- In this field, users can type in a keyword to search for Hubs and Rallies across the entire Rallyhood platform.
- Hubs and Rallies that are set to "Public" or "Private," will show in the search results.
- However, if a Hub or Rally is set as "Unlisted," it will not appear in the search results. In this case, a user would have to be explicitly invited by an Admin to join.

When the search results populate, users can look for the **"Hub"** icon and **"Rally"** icon in the bottom left corner to help with identification.
The tiles will also have one of the following icons in the top right corner to aid with identification:

- 🔒 Indicates that the Hub or Rally is Private
- 🔓 Indicates that the Hub or Rally is Public
- ♥ Indicates that the user is a member of the Hub or Rally

Note that by clicking the **"Rallyhood Logo"** anywhere in the Rallyhood platform, you will return to **My Rallyhood** Dashboard.

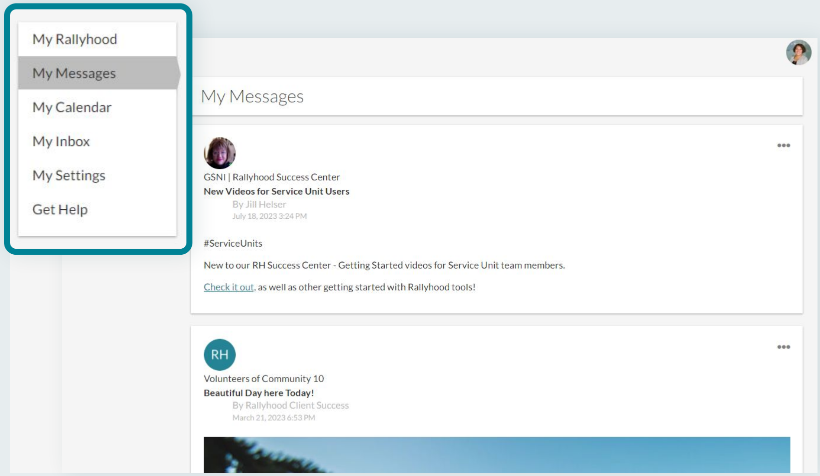


My Messages

View Demo

"My Messages" in the user Dashboard, is an aggregated activity feed of all Message Wall posts across all the Hubs and Rallies in which the user is a member.

- From **My Messages**, clicking **"View More"** will expand the message if it is longer than the condensed viewing pane.
- Clicking anywhere on the message will redirect to the **Message Wall** of the Rally where the user can react to or interact with the message.

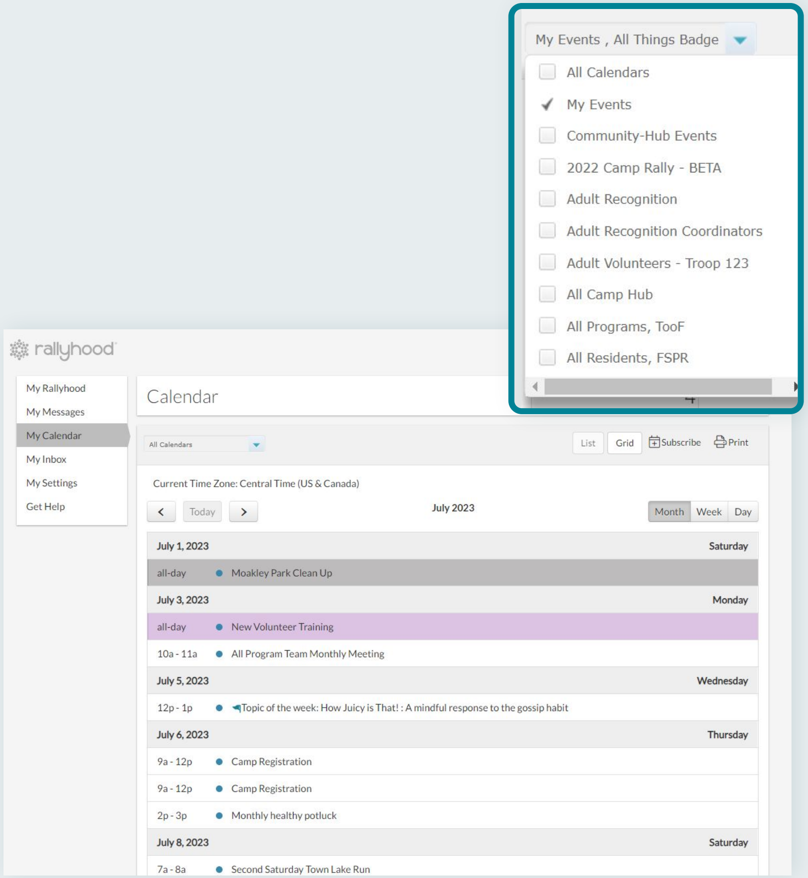


My Calendar

View Demo

"My Calendar" in the user Dashboard is an aggregated calendar that includes all of the Events, Meetings and Special Events across the user's Hubs and Rallies.

- To filter the view of events, click the drop-down menu in in the top left corner to display a checkbox menu of all Hubs and Rallies in which the user is a member.
- Select all or choose specific Hubs and Rallies you'd like to display in this part of your Dashboard experience.



My Calendar

View Demo

Continued

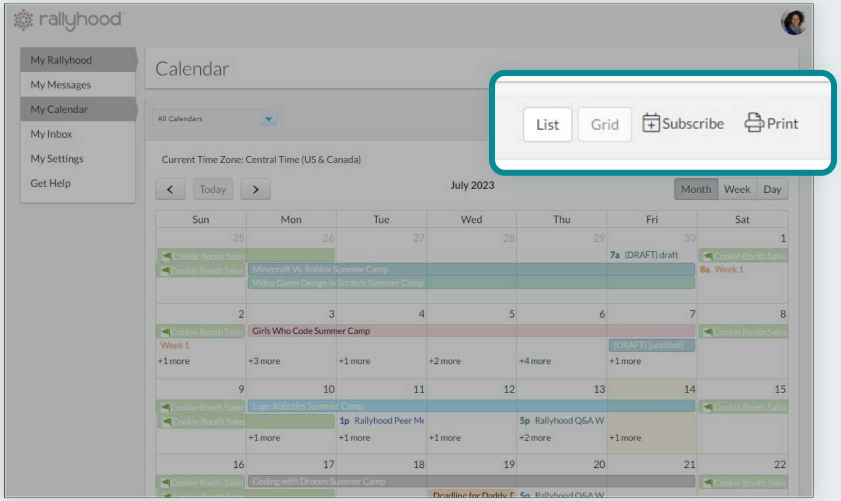
Users can choose their **Calendar** layout/view preference with the **"List and Grid"** buttons.

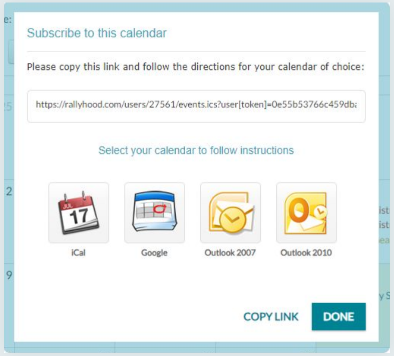
- **Grid** view, which is the default view, displays events in a traditional calendar layout.
- **List** view displays all aggregate events in a vertical list.

Click **"Subscribe"** to bring up instructions to import a Hub or Rally calendar into a personal calendar (iCal/Apple, Google, Outlook 2007, or Outlook 2010). Once synced, any event added to a Hub or Rally calendar, to which the user is subscribed, will automatically be added to their personal calendar.

Click **"Print"** to prompt the print set-up to print the current month in the selected calendar display format.

Click **"Done."**





My Inbox

View Demo

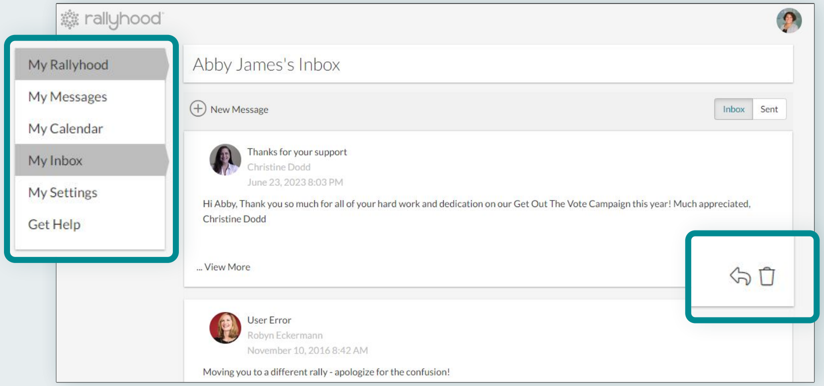
"My Inbox" is a Rallyhood user's direct messages sent from other Rallyhood users. This is a 1:1 communication versus whole group communication, which happens on the Rally **Message Wall**.

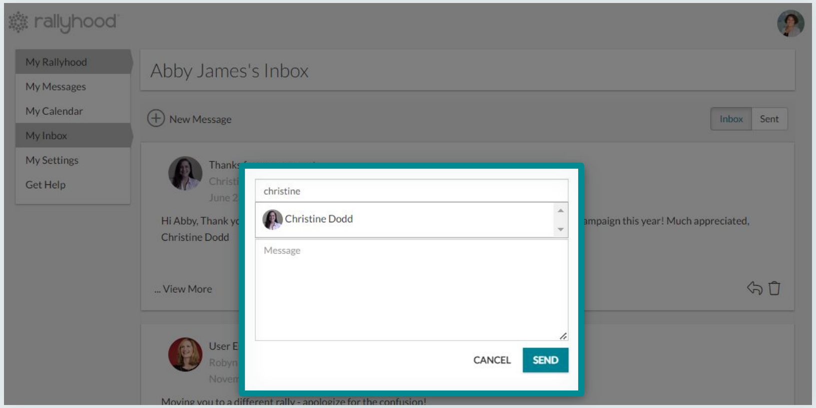
When a user has new messages in their **Inbox**, a number will be displayed next to this menu item informing how many new messages are there.

User's can also send direct messages from here to other Rallyhood users.

- Click on **"New Messages"** on the top left side of the page.
- Enter the Recipient Name.
- Add a Subject Line.
- Add a Message.

Click **"Send."**





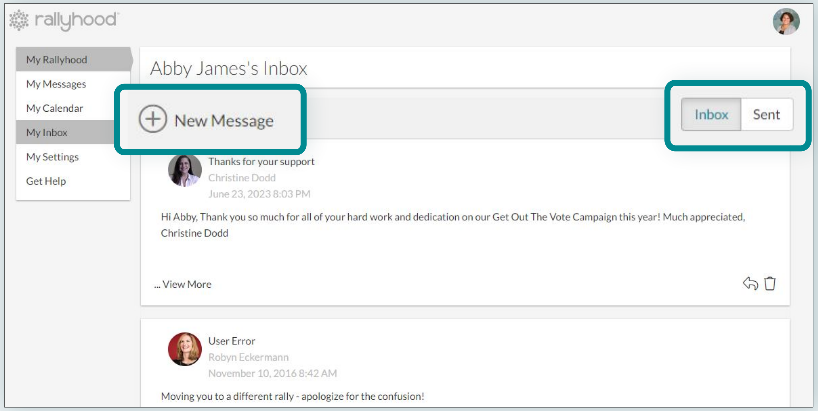
My Inbox

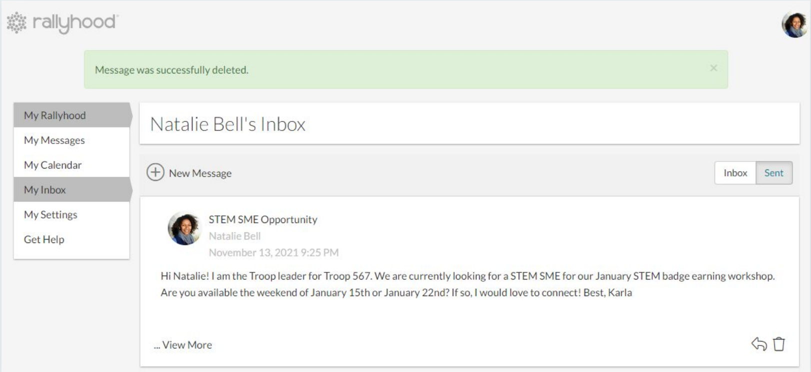
View Demo

Continued

Options for interacting with **"My Inbox"** are:

- Click **"View More"** and, if the message is longer than the display, it will expand to show the entire message.
- Click the **"Arrow"** icon to reply to the message.
- Click the **"Trash Can"** icon to delete the message.
- Click **"New Message"** to start a direct interaction with Rallyhood Members.
    - When typing a name in the **"Recipient"** box, the system will search for users that are connected as Members and populate to display the Members profile image.
- Click **"Sent"** to display all of the direct messages a user has sent to Members.





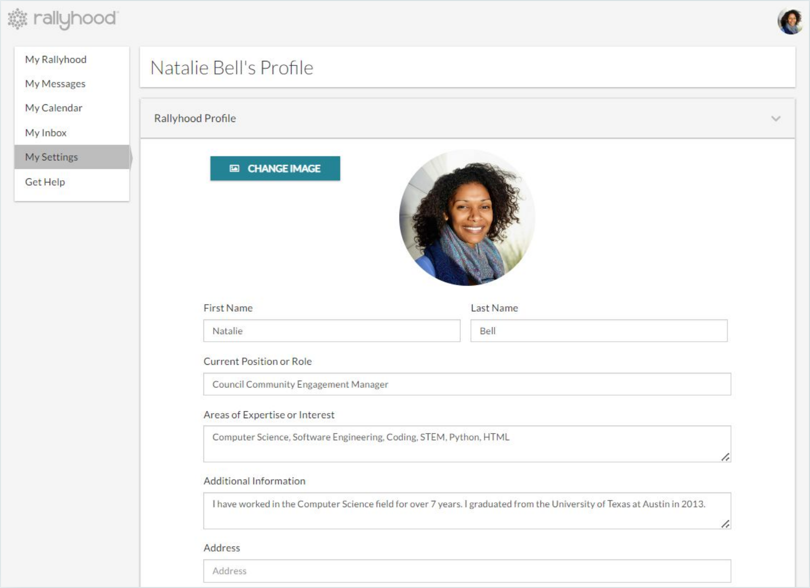
My Settings

View Demo

"My Settings" is where a user can set up the details of their profile and personalize their Rallyhood experience.

Click **"Rallyhood Profile"** to open a menu of options to manage the following user information:

- First and Last Name.
- Current Position or Role.
- Areas of Expertise or Interest.
- Additional Information.
- Address (including street, city, state, and zip).
- Mobile phone number.
- URLs for Facebook, LinkedIn, and Twitter.



My Settings

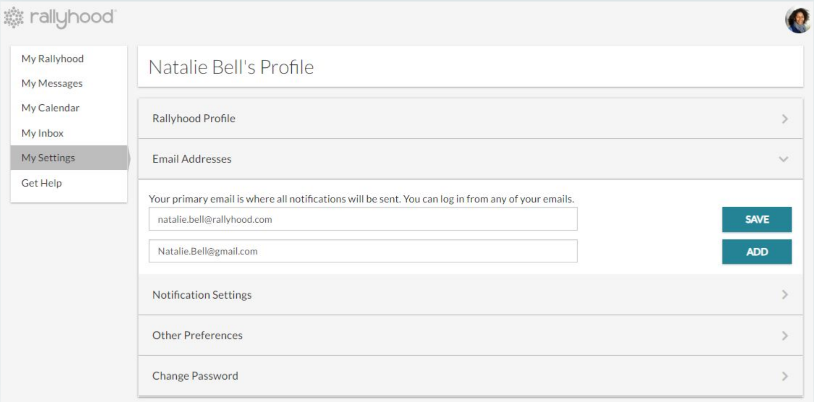
View Demo

Continued

In **"My Settings"**, click **"Email Addresses"** to:

- Change the primary email address associated with the account; this email address is where all communications from Rallyhood will be directed.
- Add additional email addresses. If another user sends or shares something from within Rallyhood to one of the secondary email addresses, it will funnel to the primary email address.

Click **"Save."**



My Settings

View Demo

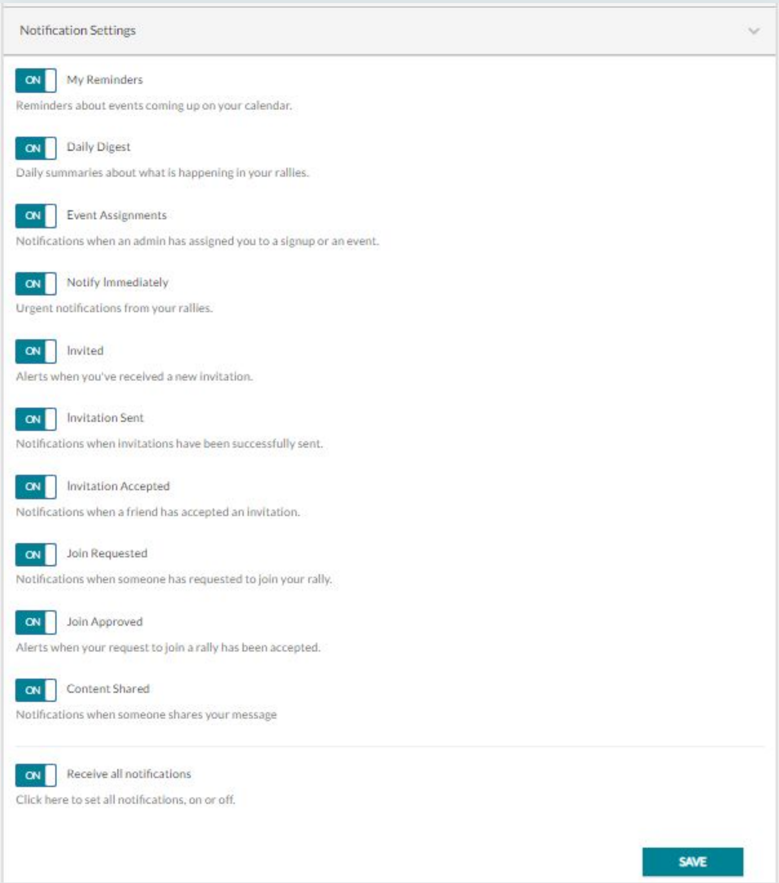
Continued

To Manage notification preferences, click **"Notification Settings"** to turn any or all of the following notifications on & off at any time. These can be changed individually or all at once. The Notification Settings include:

- **My Reminders:** Events coming up.
- **Daily Digest:** Daily summaries from Rally activity.
- **Event Assignments:** When a user has been assigned a task.
- **Notify Immediately:** Posts that are time sensitive.
- **Invited:** Invitations to join a Hub or Rally.
- **Invitation Sent:** Notifications when the user invitations have been successfully sent.
- **Invitation Accepted:** Notifications when a friend / member has accepted the invitation to join a Hub or Rally.
- **Join Requested:** Notifications when someone has requested to join a Rally, which an Admin then accepts or declines.
- **Join acceptd:** Alerts when the user request to join a Rally has been accepted.
- **Content Shared:** Notifications to the author of a post when another member shares the post to another Rally.

Click **"Save"** when finished selecting the Notification Settings.

**Notification preferences that are turned on will impact the number of emails a user could potentially receive from Rallyhood on a daily basis.*



My Settings

View Demo

Continued

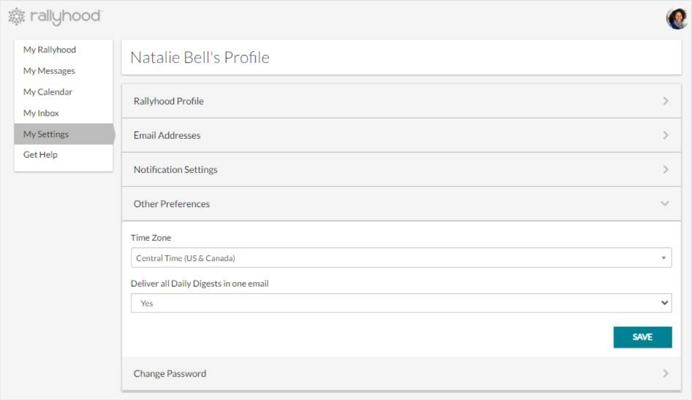
Clicking **"Other Preferences"** gives user's the opportunity to adjust their profile default time zone and select a preference to receive an individual Daily Digest email from each Hub and Rally or to condense them all into one email.

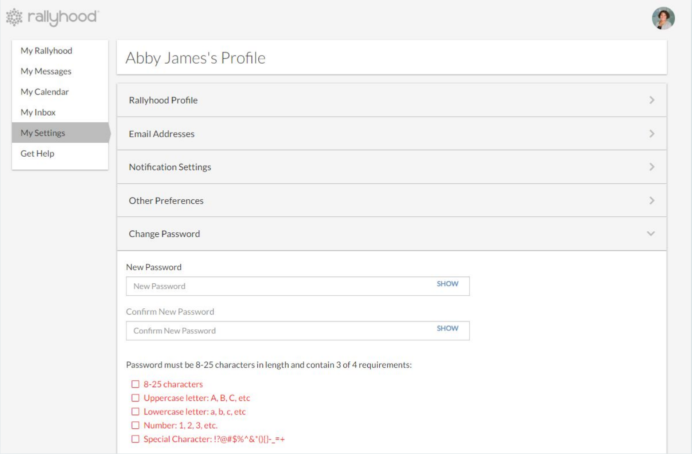
In Settings, users can also change their Password:

- Click **"Change Password"** to update and change your Rallyhood password at any time.
- As the new password is entered, it will automatically check the boxes next to the requirements so that a user can be sure that the new password is secure.

Click **"Save."**

It is very important to click "Save" at the bottom of each section in "My Settings" before moving to the next one.





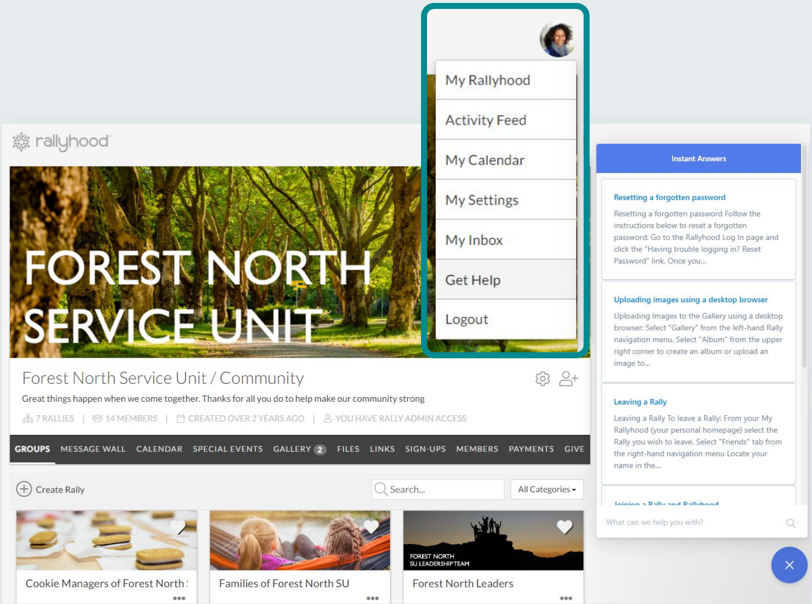
Get Help

View Demo

"Get Help" launches an sidebar library of **Instant Answers** that are support articles populated based on keywords and built from Rallyhood FAQs.

- Clicking **"What Can We Help You With?"** at the bottom of the sidebar will allow a user to type in any keyword of their choosing to search for related support articles.
- After typing in a keyword, if a user scrolls through the results to the bottom and does not find one that contain the desired information, the user will see **"Get In Touch".**

Clicking **"Get In Touch,"** or clicking **"Ask"** at the top of the sidebar, will send a message directly to the Rallyhood tech support team. The support team can also be contacted at support@rallyhood.com



Create a Rally

View Demo

While the **"Start A Rally"** button is available on the user's **Dashboard**, for Premium Accounts, we recommend users follow the instructions below to ensure Rallies are created as part of the organization's ecosystem.

To Start Rallies in your Organization's Ecosystem:

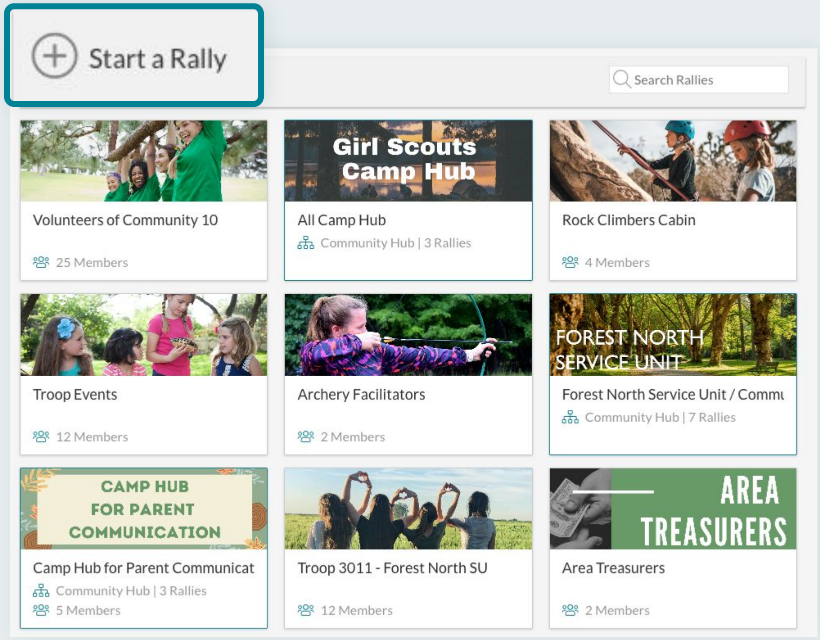
- A user should always request a new Rally by direct messaging or emailing a Hub Administrator or Council Staff Member.
- Details on starting a Rally from the Hub can be found in the Hub Environment section of this user guide.

Why not just start a Rally from the **Dashboard**?

- If a Rally is started from the **Dashboard**, it would be a stand-alone "Rogue Rally" and will not be connected to the organization's ecosystem.
- If a user has created what Rallyhood refers to as a "Rogue Rally," an Admin can reach out to the Rallyhood support team who can bring that Rally into the appropriate place in the ecosystem.

How do I reach out for help?

- Click the **"Get Help"** button or send an email to support@rallyhood.com



Hub Environment

Hub Overview

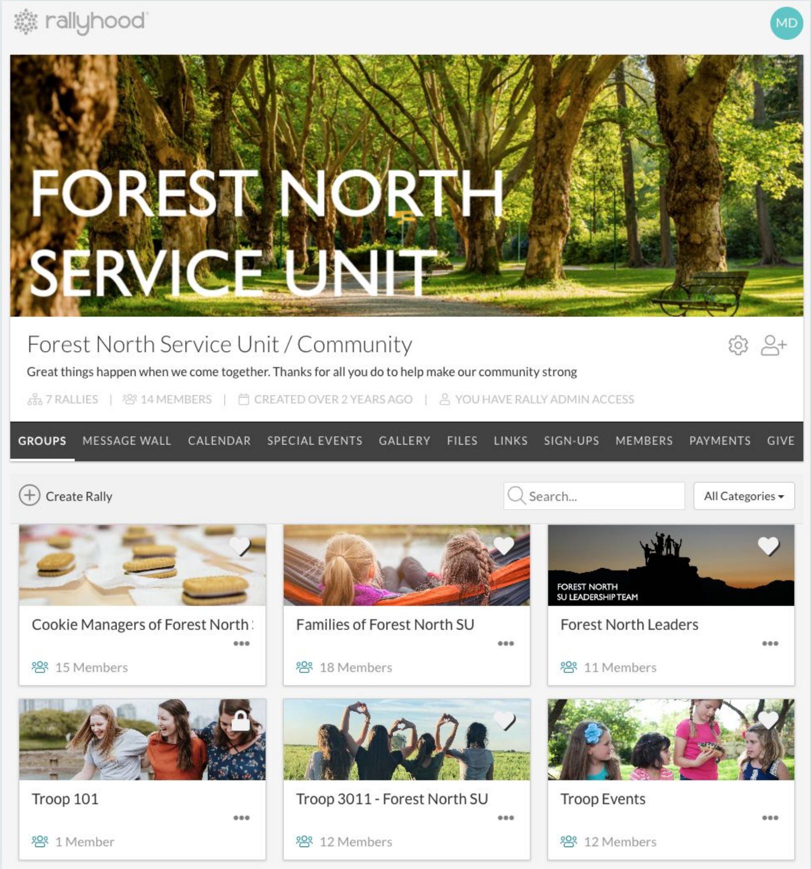
View Demo

A **"Hub "** is a way to manage Rally groups and subgroups that relate to one another, under one umbrella.

On the Hub landing page, a user can see all of the Rallies that are a part of the respective Hub.

Hub Admins have access to create, edit, and delete content for the Hub as well as create, edit, and delete Rallies and associated content that are within that Hub.

Hub Admins are typically an organizational leader or serve in a high-level volunteer position.



Hub Settings

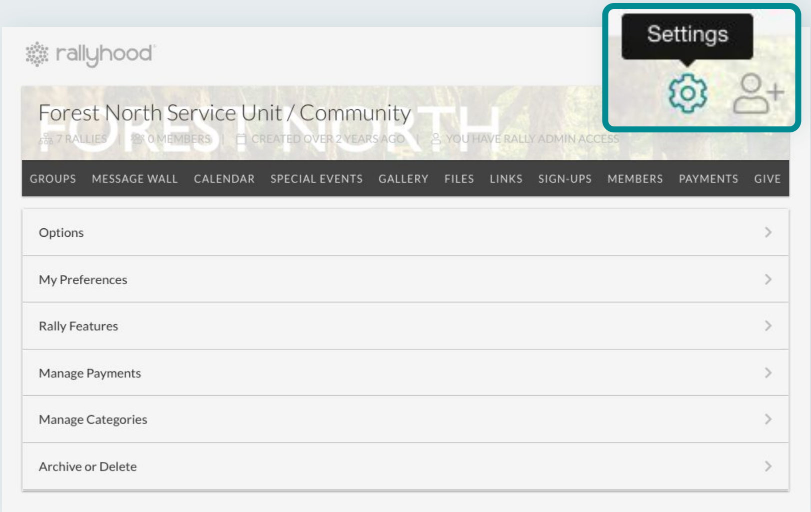
View Demo

To manage the settings of a Hub, an Admin can click on the **"Settings Gear"** icon, in the top right of the page.

By clicking the **"Settings Gear"**, the Admin can manage the following settings:

- Options
- My Preferences
- Rally Features
- Manage Payments
- Manage Categories
- Archive or Delete

Details of each are on the following pages.



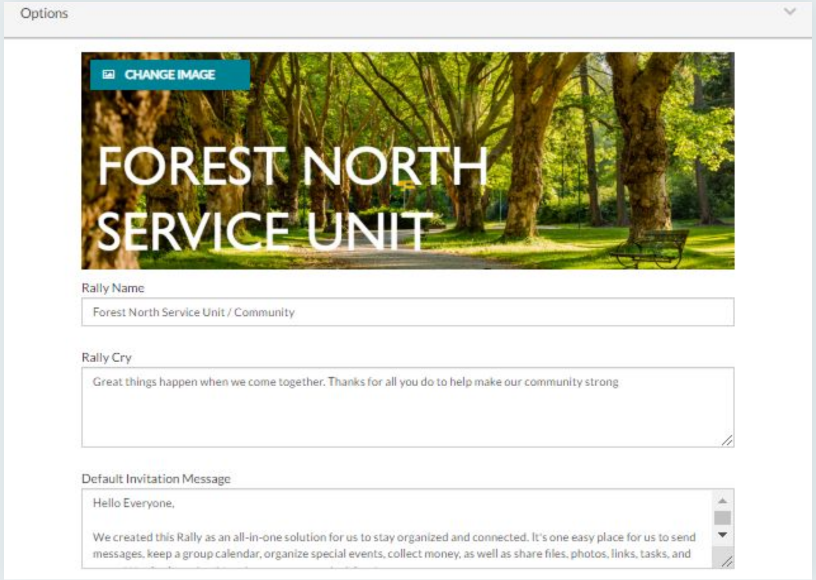
Hub Settings

View Demo

Continued

The **"Options"** section is available only to Admins. In this section, Admins can edit the following elements:

- The **Banner image.**
- The **Name** for the Hub or Rally.
- The **Rally Cry** or **description.**
- A **Default Invitation Message** that will be a part of the invitation sent to members who are invited to join the Hub or Rally.



Hub Settings

View Demo

Continued

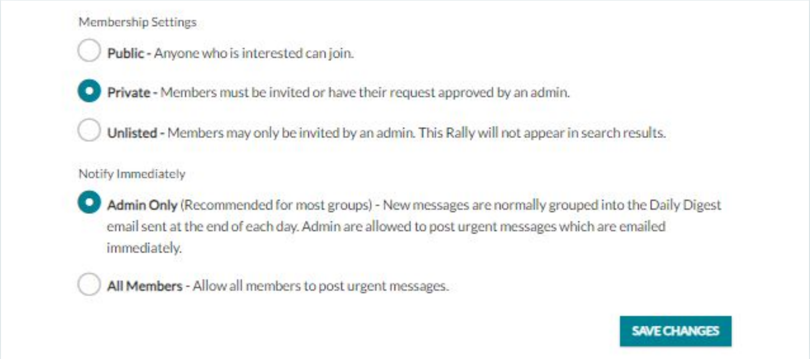
In the **"Options"** section, Admins can adjust the **Membership Settings:**

- **Public** makes the Hub searchable and viewable by anyone in Rallyhood and any Rallyhood user can join the Hub.
- **Private** makes it searchable but users must be invited or submit a request to join.
- **Unlisted** makes the Hub hidden from searches and all members have to be directly sent an invitation by an Admin.

"Notify Immediately" allows the Hub Admin to choose whether all Hub members or only Hub Admins can designate a post to be sent as an immediate email and a push notification via the Rallyhood app.

Users can choose whether to receive Notify Immediately alerts by turning that option on or off in their user **Dashboard** in **My Settings.**

Click **"Save Changes."**



Hub Settings

View Demo

Continued

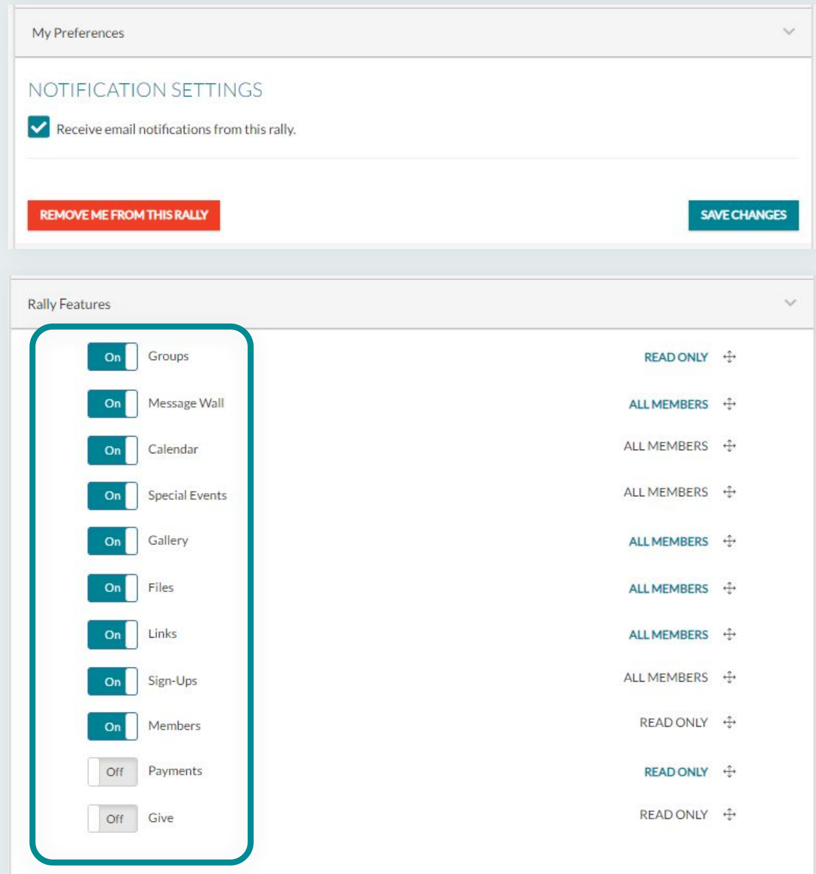
"My Preferences" section is available to all Hub Members.

- Users can choose to include the Hub in their Daily Digest.
- Users can quickly leave a Hub by clicking **"Remove Me From This Rally."**

Hub Admins can adjust the following **"Hub Features"** for the Hub:

- Turn **Features** "**On**" & "**Off**" in the Hub navigation menu
- **Groups:** View all Rallies under the Hub
- **Message Wall:** View, create, and interact with Message posts
- **Calendar:** View and create Quick Events and Special Events
- **Special Events:** View, create, and edit Special Events
- **Gallery:** Upload photos and create albums
- **Files:** Upload files and create folders
- **Links:** Add URL links and create boards
- **Sign-Ups:** Create and share sign-ups
- **Friends:** View Member Profiles and send Private Messages
- **Payments:** Sell and purchase items with Stripe
- **Give:** Create and contribute to fundraisers using Stripe

Click **"Save Changes."**



Hub Settings

View Demo

Continued

The **"Rally Features"** section is where Admins can manage feature permission settings for the **Hub**.

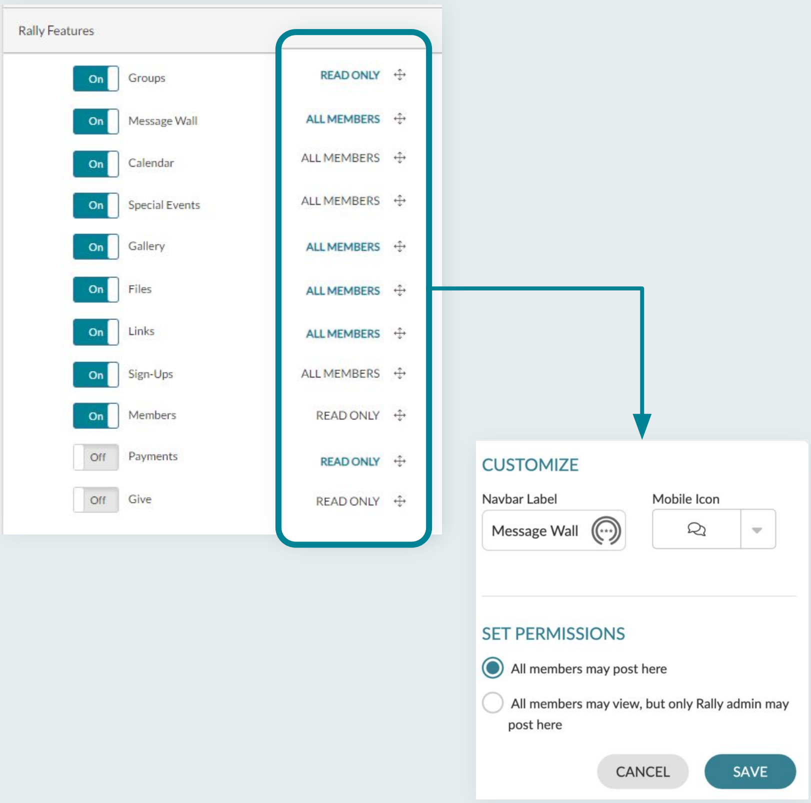
If the permission setting is in blue font, Hub Admins can click on it to:

- Set Feature Permissions:
  - Public
  - All Members
  - Read Only
- Customize each Feature:
  - Change the "Label" and "Icon" of that feature for the Hub navigation menu
- **Set Permissions:**
  - All Members may post here
  - All members may view, but only admin may post here

Click **"Save."**

Making changes to the label, icon, and permissions at the Hub level will also make those changes to every Rally under that Hub umbrella.

To the right of the Feature Permissions, click the **"Move"** plus icon to drag and drop to reorder the features on the Hub navigation menu – top to bottom in this view equates as left to right in the Rally's navigation menu.



Hub Settings

View Demo

Continued

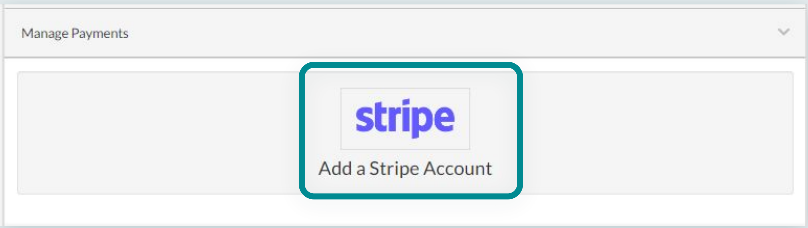
All members can click on **"Manage Payments"** to add their Stripe Account to utilize in the Special Events, Payments, and Give features.

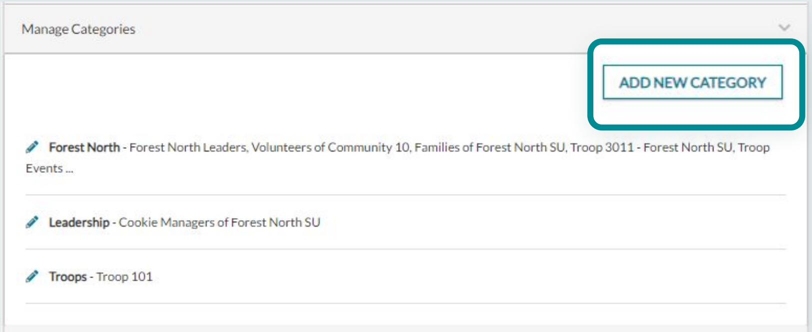
- For more information, please refer to the Stripe section of this user guide and tutorial video.

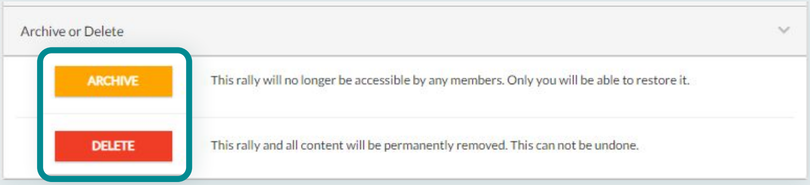
"Manage Categories" is <u>only</u> accessible by Hub Admins. Here the Admin can create and manage categories. When creating a new Rally in the Hub, the Rally can be assigned to a category for disseminating information to specific groups.

Hub Admins can **"Archive or Delete"** a Hub.

- **"Archive:"** The Hub will no longer be accessible by any members. Only Admins will be able to restore it.
- **"Delete:"** The Hub and all content will be permanently removed. This can not be undone.







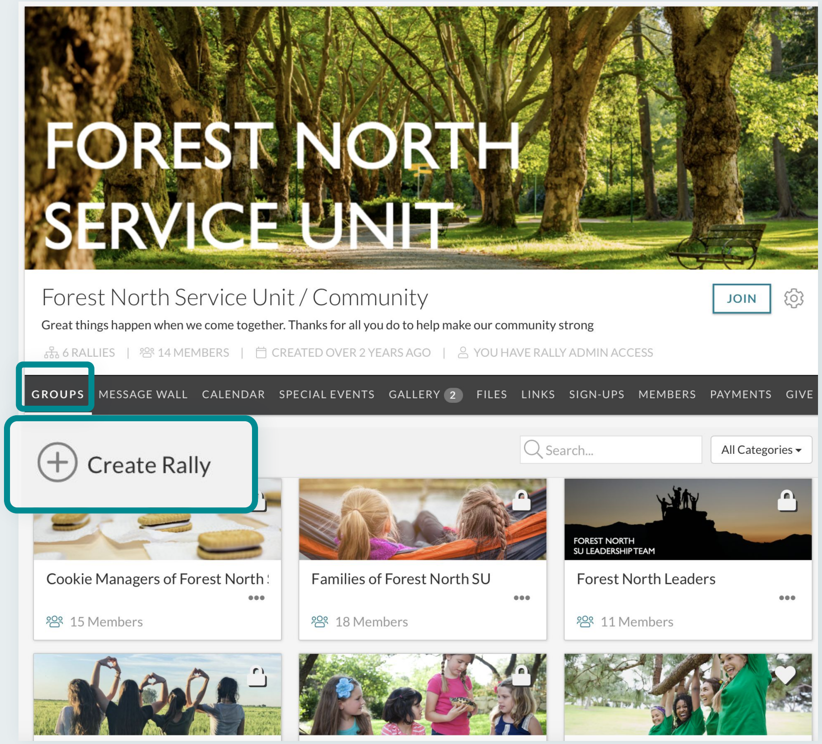
Create A Rally Within A Hub

View Demo

Hub Admins can create new Rallies under the Hub umbrella and can then push communications and content to those Rallies, individually or all at once.

To **"Create Rally"** within a Hub, Admins can click **"Create Rally"** below the black Navigation menu bar on the left side of the page.

Follow the prompts to set up the Rally.



Create A Rally Within A Hub

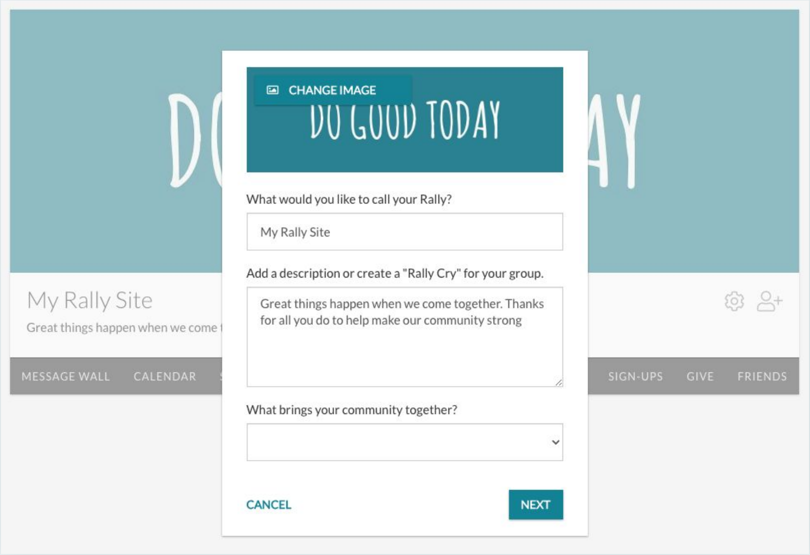
View Demo

Continued

To customize your Rally. You will simply follow the prompts.

- Set the Banner image by clicking **"Change Image".**
- Follow on-screen instructions to:
    - Add **Rally Name**
        - Rallyhood suggests using a standardized naming convention to make the organization's ecosystem cohesive.
    - Add a **Description** or **Rally Cry**.
    - Assign a **Category -** This option is available if categories have been created at the Premium Admin level.

Click **"Next"** to create the Rally.



Create A Rally Within A Hub

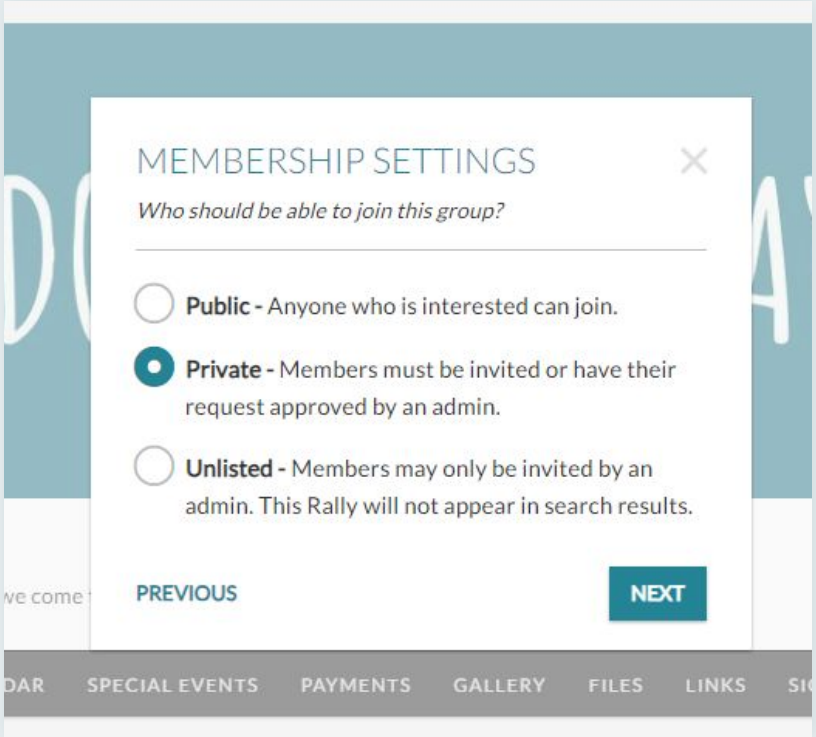
View Demo

Continued

The next step is to set the Rally "**Membership Settings**". You can choose the following options:

- **Public:** searchable and viewable by anyone in Rallyhood and any Rallyhood user can click to join the Hub or Rally.
- **Private:** searchable but users have to request to join and the request will be submitted for an Admin to accept or reject.
- **Unlisted:** makes the Hub or Rally hidden from searches and all members have to be directly sent an invitation to join.

Click **"Next."**



Create A Rally Within A Hub

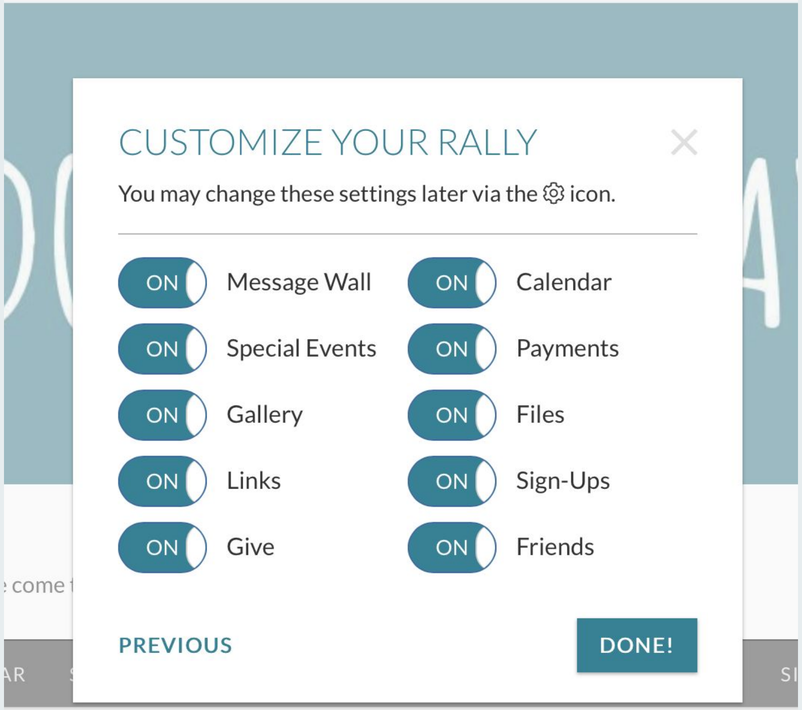
View Demo

Continued

Next, you can customize the Rally by choosing which **Features** to utilize in the Rally's Navigation Bar.

You can use the toggles to simply turn each feature **"On"** & **"Off."**

Click **"Done"** to save your Rally settings.



Create and Share Content

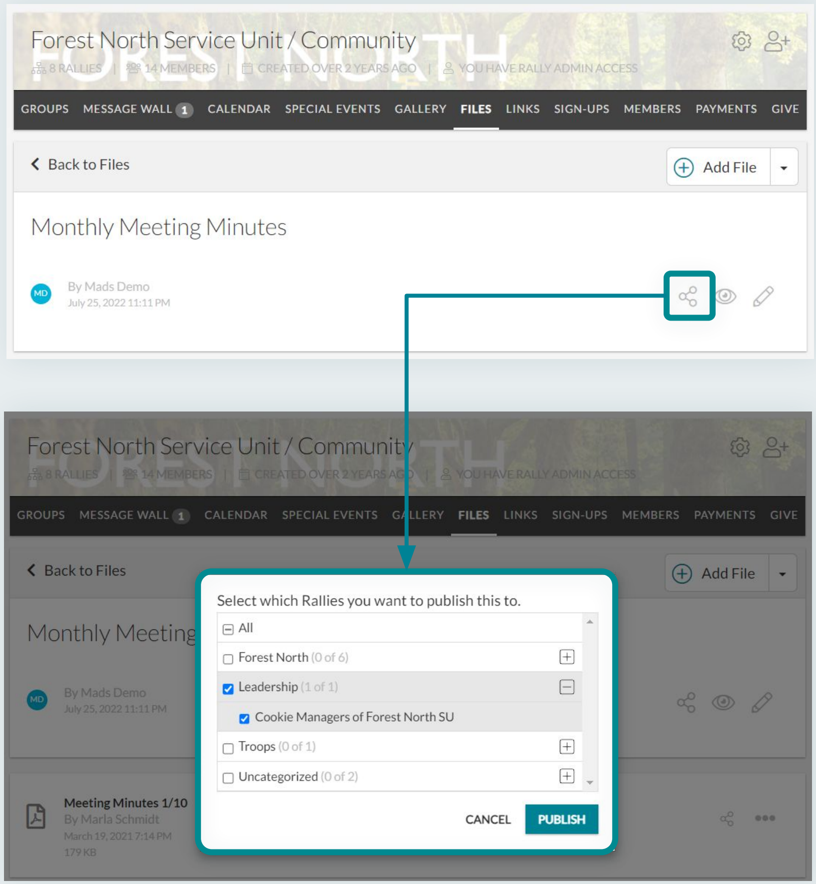
View Demo

Hub Admins can create content at the Hub level and then select the Rallies (within the Hub) where they want that content to appear.

This functionality gives Admins the ability to distribute communications to the right Rallies quickly.

To share content, Hub Admins first create message posts or add content (files, links, etc) at the Hub level and then select the **"Share"** icon.

This will open up the **"Share"** Modal, which enables the Admin to then select the Rallies where they would like to share by checking the box next to the Rally Name.



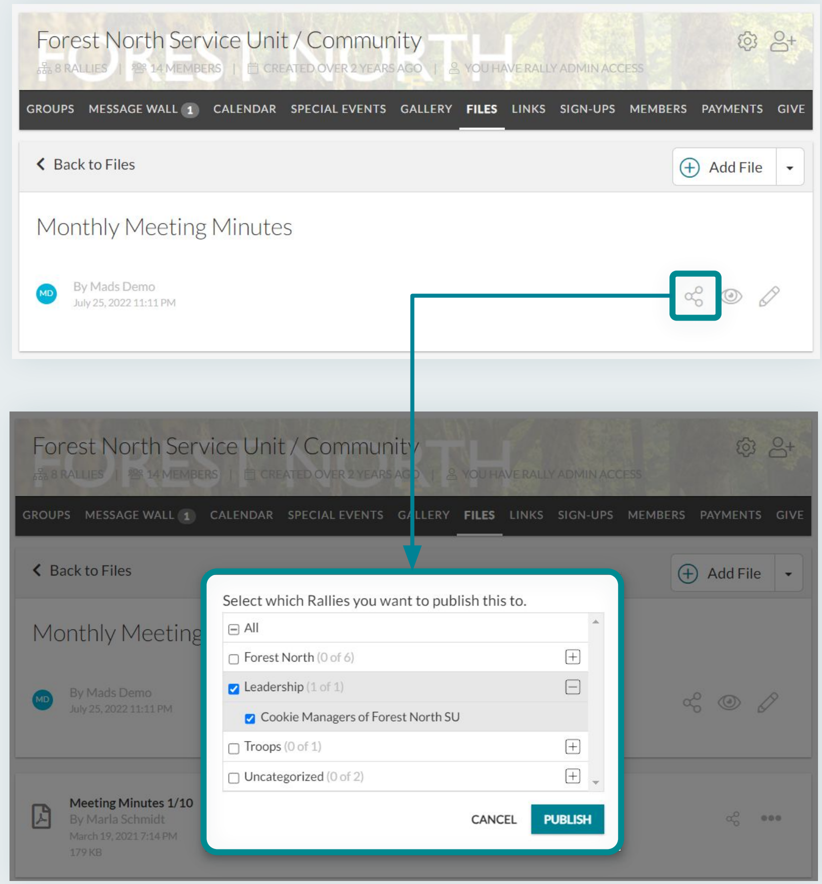
Create and Share Content

View Demo

Continued

Sharing content to Rallies (within the Hub) is available for the following features:

- **Message Wall**: Click the **"Share"** icon and then select the Rallies. Click Publish.
- **Calendar:** Click the **"Share"** icon and then select the Rallies. Click Publish. Note: **"RSVP Events"** can not be shared.
- **Special Events:** Click the 3-dot **"Ellipsis"** icon, click share and select the Rallies. Click Publish. You can also click **"Get Shareable Link"** to share with people outside of Rallyhood.
- **Files:** Click the **"Share"** icon and then select the Rallies. Click Publish. Note: Folders within folders cannot be shared.
- **Links:** Click the **"Share"** icon and then select the Rallies. Click Publish. *Note*: Boards within Boards cannot be shared.
- **Sign-Ups:** Click the **"Share"** icon and then select the Rallies. Click Publish.
- **Payments:** Click the 3-dot **"Ellipsis"** icon, click share and select the Rallies. Click Publish.
- **Give:** Click the 3-dot **"Ellipsis"** icon, click share and select the Rallies. Click Publish.



Rally Environment

Rally Homepage

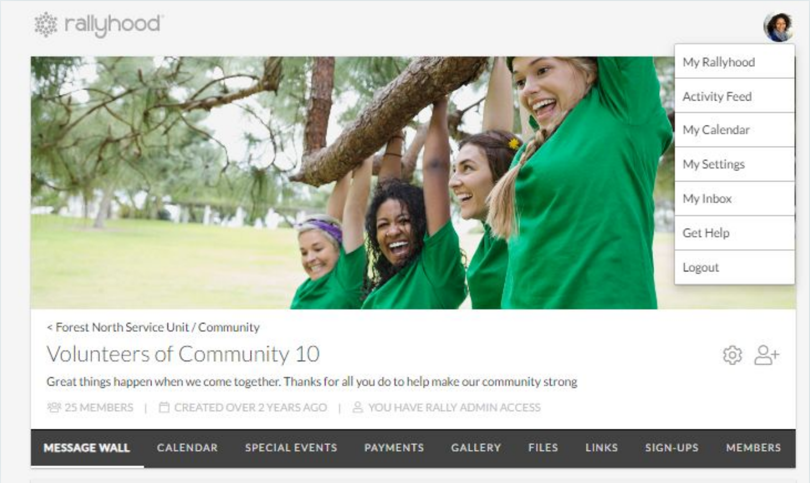
View Demo For Admins   View Demo For Members

The **"Rally"** is where the day to day communication and collaboration takes place for members of the group. Hub and Rally Admins can share content directly to the "**Message Wall**", and posts will be delivered in the Daily Digest email at the end of the day.

Admins and Members can share content to the **"Message Wall"** in any or all other Hubs & Rallies of which they are members.

Hub and Rally Admins have the ability to monitor and manage all communication within their purview.

- There is no limit to the number of Members in a Rally.
- There is no limit to the number of Admins assigned to a Rally.



Rally Settings

View Demo For Admins

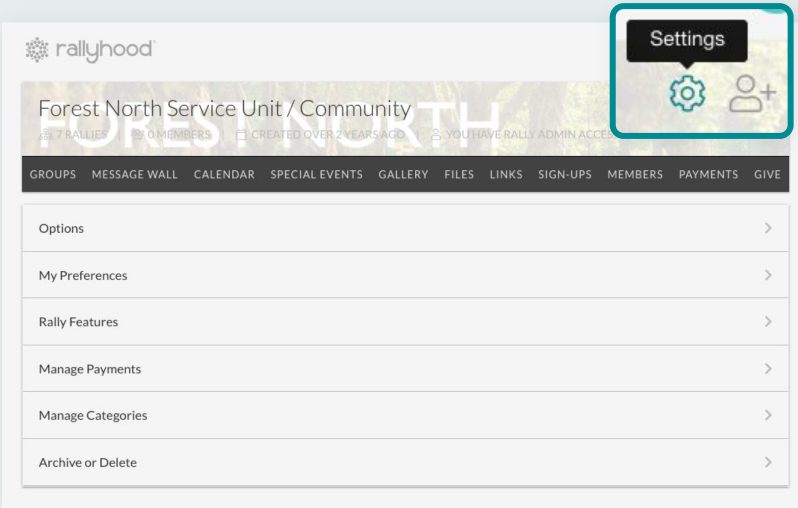
View Demo For Members

To manage the settings of a Rally, an Admin can click on the **“Settings Gear”** icon, in the top right of the page.

By clicking the **“Settings Gear”** the Admin can manage the following Rally settings:

- Options
- My Preferences
- Rally Features
- Manage Payments
- Manage Categories
- Archive or Delete

Details of each are on the following pages.



Rally Settings

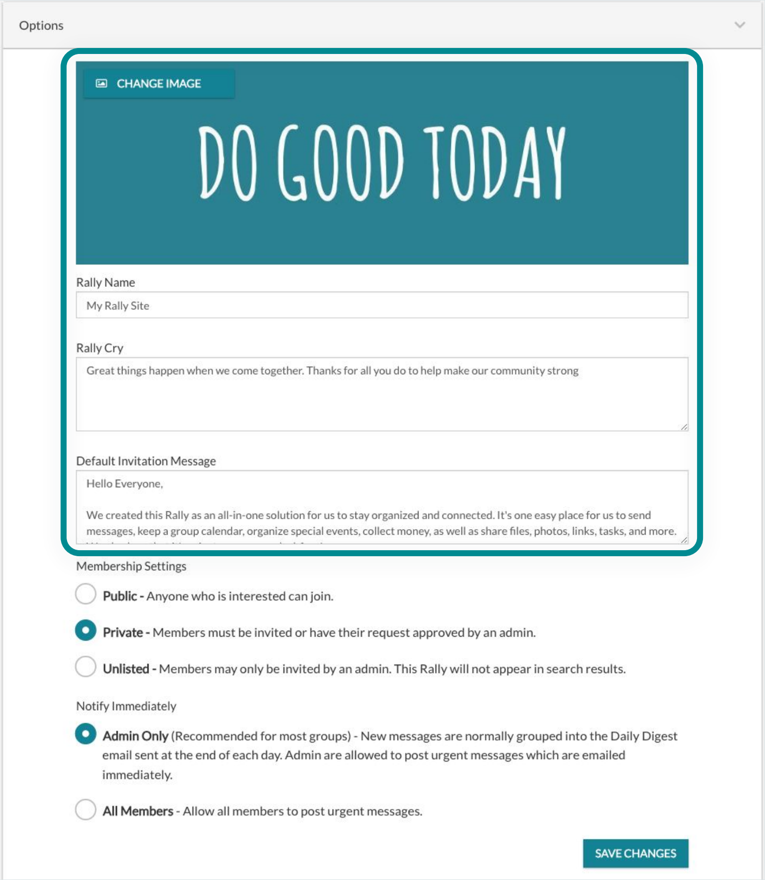
View Demo For Admins

View Demo For Members

Continued

The **"Options"** section is available only to the Rally Admin(s). In this section. Admins can edit the following elements:

- The **Banner image.**
- The **Name** for the Rally.
- The **Rally Cry** or **description**.
- A **Default Invitation Message** that will be a part of the invitation sent to members who are invited to join the Rally.



Rally Settings

View Demo For Admins | View Demo For Members

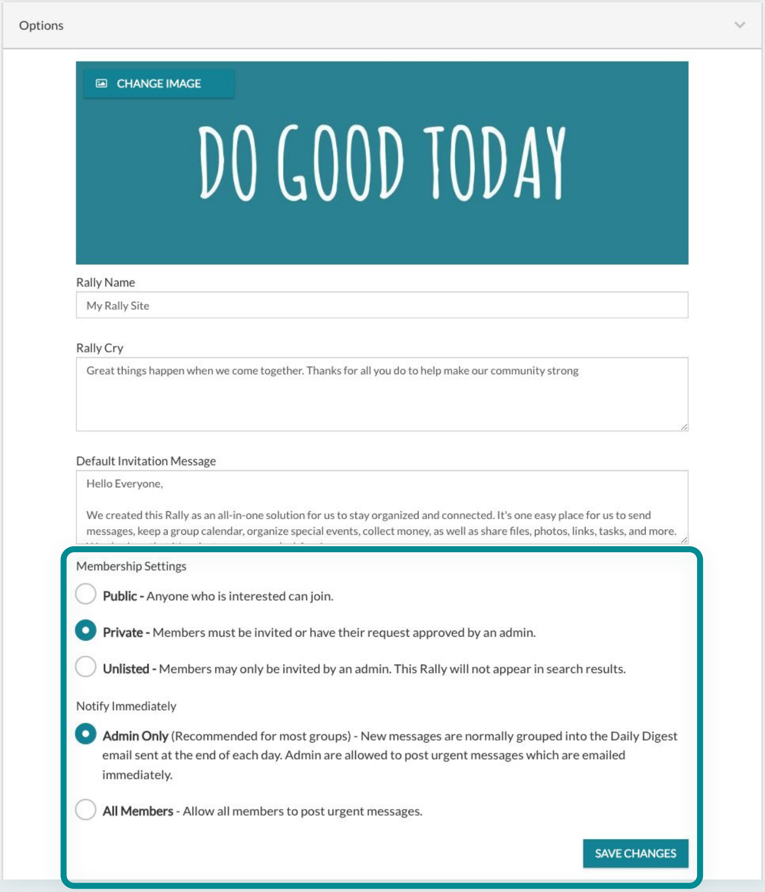
Continued

- As part of the **"Options"** section, Rally Admins can adjust the **Membership Settings:**
  - **Public** makes the Rally searchable and viewable by anyone in Rallyhood and any Rallyhood user can join the Rally.
  - **Private** makes the Rally searchable, but users must be invited or submit a request to join.
  - **Unlisted** makes the Rally hidden from searches and all members have to be directly sent an invitation by an Admin.

"Notify Immediately:" Admins can choose whether all members or only Admins can designate a post to be sent as an immediate email and a push notification via the Rallyhood app.

User's can choose whether to receive Notify Immediately alerts by turning that option on or off in their user **Dashboard** under **"My Settings."**

Click **"Save Changes."**



Rally Settings

View Demo For Admins | View Demo For Members

Continued

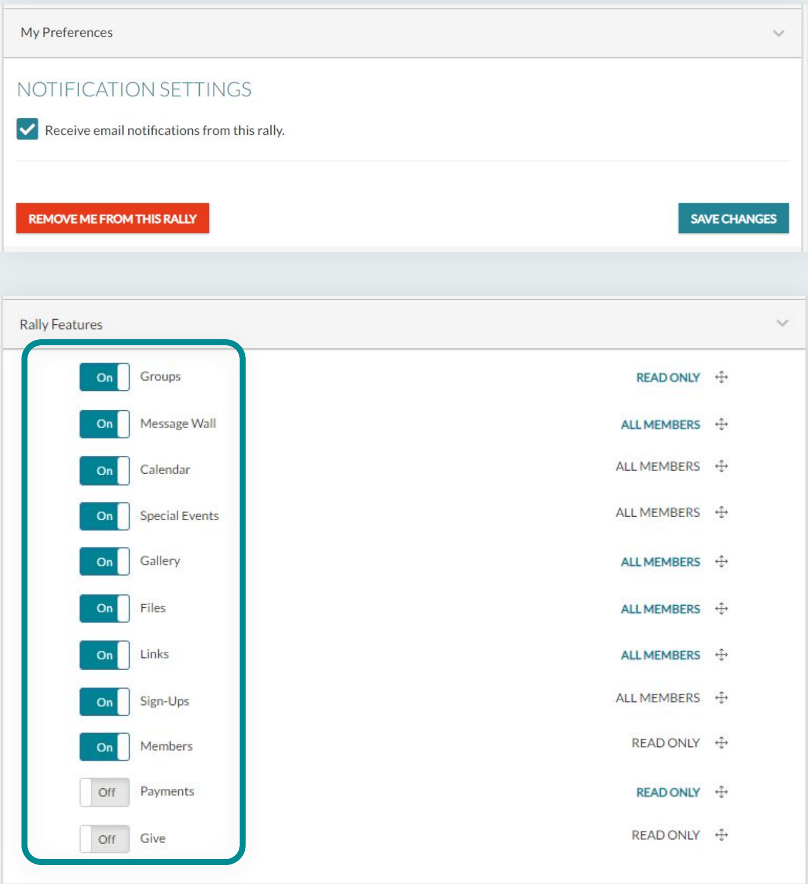
“My Preferences” section is available to all Rally Members.

In **“Notification Settings”**:

- Users can choose to include the Rally in their Daily Digest.
- Users can quickly leave a Rally by clicking **“Remove Me From This Rally.”**

Admins can adjust the following **“Rally Features”** for the Rally:

- Turn **Features** “**On**” & “**Off**” in the Rally Nav Bar Menu.
- **Message Wall:** View, create, and interact with Message posts.
- **Calendar:** View and create Quick Events and Special Events.
- **Special Events:** View, create, and edit Special Events.
- **Gallery:** Upload photos and create albums.
- **Files:** Upload files and create folders.
- **Links:** Add URL links and create boards.
- **Sign-Ups:** Create and share sign-ups.
- **Friends:** View Member Profiles and send Private Messages.
- **Payments:** Sell and purchase items with Stripe.
- **Give:** Create and contribute to fundraisers using Stripe.



Rally Settings

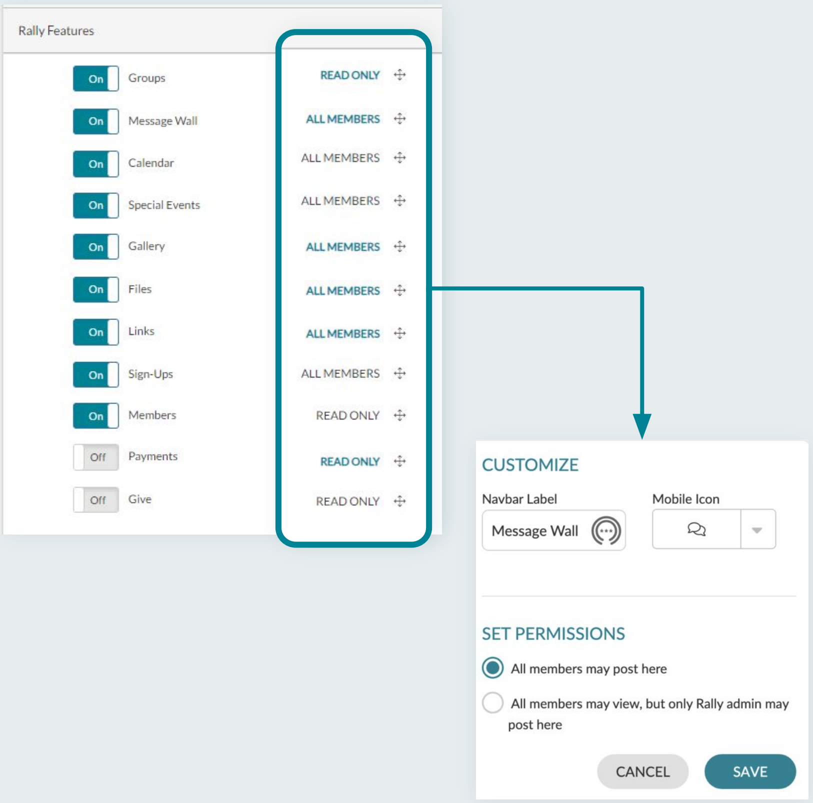
View Demo For Admins | View Demo For Members

Continued

The **"Rally Features"** section is also where Admins can manage permission settings for each feature in the Rally.

If the permission setting is in blue font, Admins can click on it to:

- Set **Feature Permissions** for how they want the members to be able to interact with this part of the Rally:
  - All Members (can post)
  - Read Only (only admins can post)
- Customize each **Feature:**
  - Change the "Label" of the feature, if a different nomenclature is needed to help the audience understand. For example, instead of "Files" the label could read "Camp Resources" if its a Camp Rally.
- **Set Permissions:**
  - All Members may post here
  - All members may view, but only admin may post here
- Move the Features In the Nav Bar:
  - To the right of the Feature Permissions, click the **"Move"** plus icon to drag and drop to reorder the features on the Rally navigation menu, as relevant to the group.



Rally Settings

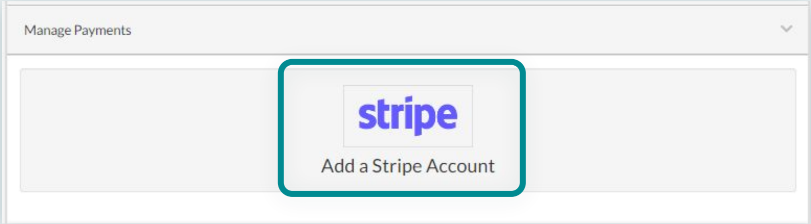
View Demo For Admins   View Demo For Members

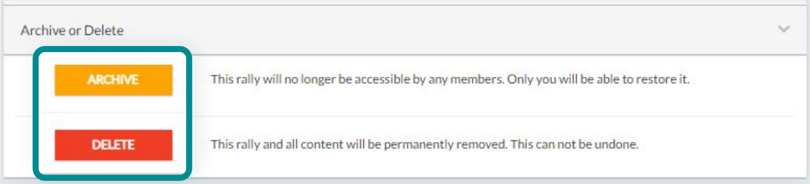
All members can click on **"Manage Payments"** to add their Stripe account to utilize in the **Special Events, Payments, and Give** features.

- For more information, please refer to the Stripe section in this user guide and tutorial video.

Rally Admins can **"Archive or Delete"** a Rally.

- **"Archive:"** The Rally will no longer be accessible by any members. Only Admins will be able to restore it.
- **"Delete:"** The Rally and all content will be permanently removed. This cannot be undone.





Message Wall

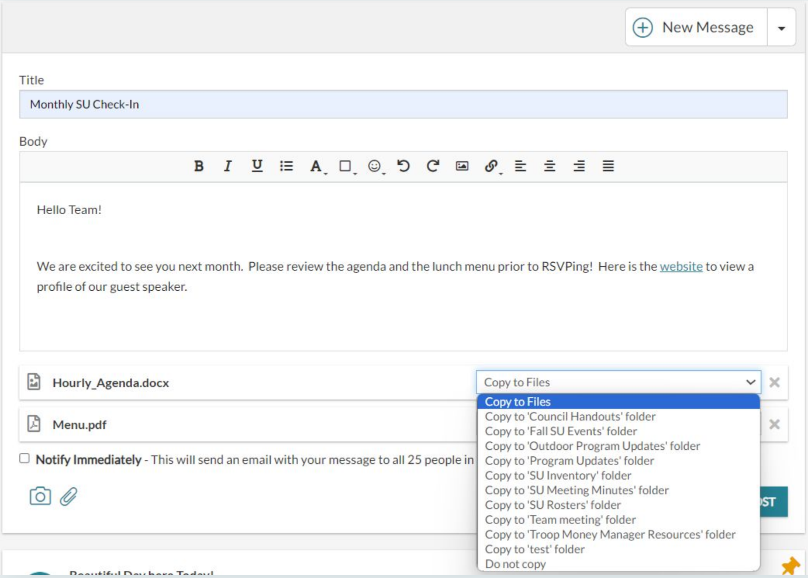
View Demo For Admins

View Demo For Members

The **"Message Wall"** feature is where all Rally members can communicate in the Rally.

Posting Content to the Message Wall

- Clicking **"New Messages"** opens space to create a message.
  - Type a Title (or subject) for the message.
  - Type a message and use the formatting menu items to customize your message.
  - Attach **"Pictures"** and **"Documents"** to the Message by clicking the "camera" icon or the "paperclip" icon. You can also drag and drop a file into the body of the message area.
  - When attaching a file or photo, a **"Drop-Down Menu"** will appear providing the option to save the document into the Rally **Files** or **Gallery** sections.
  - The **"Notify Immediately"** option, if checked, will push an email and notification to the Rallyhood app immediately.
  - Click **"Post"** to share the message to the **Message Wall**.



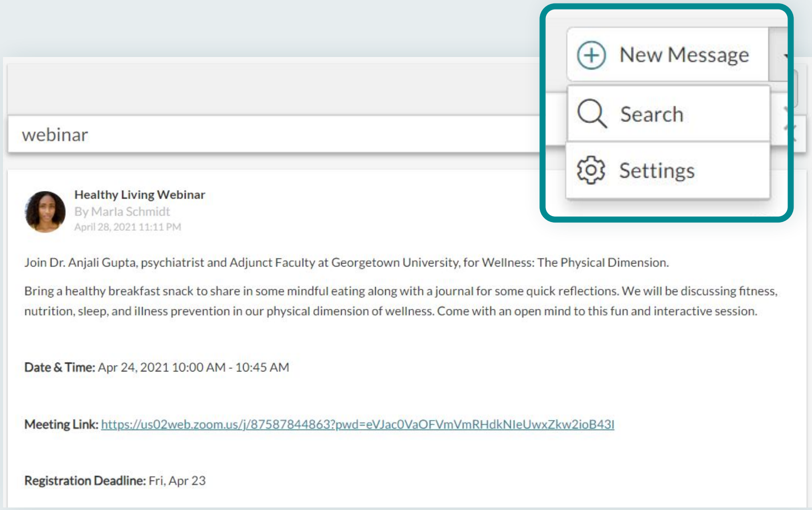
Message Wall

View Demo For Admins | View Demo For Members

Continued

- Click **"New Message"** or the arrow next to it to open a drop-down menu with more options on the right side of the page:
  - Clicking **"Search"** enables you to search the **Message Wall** by keyword so you can easily find previously posted messages.
  - Clicking **"Settings"** enables you to edit and customize the **Message Wall** settings for this Rally:
    - Change the "Label"
    - Set Permissions for the message wall:
      - All Members may post here
      - All members may view, but only admin may post here

Click "**Save.**"



Message Wall

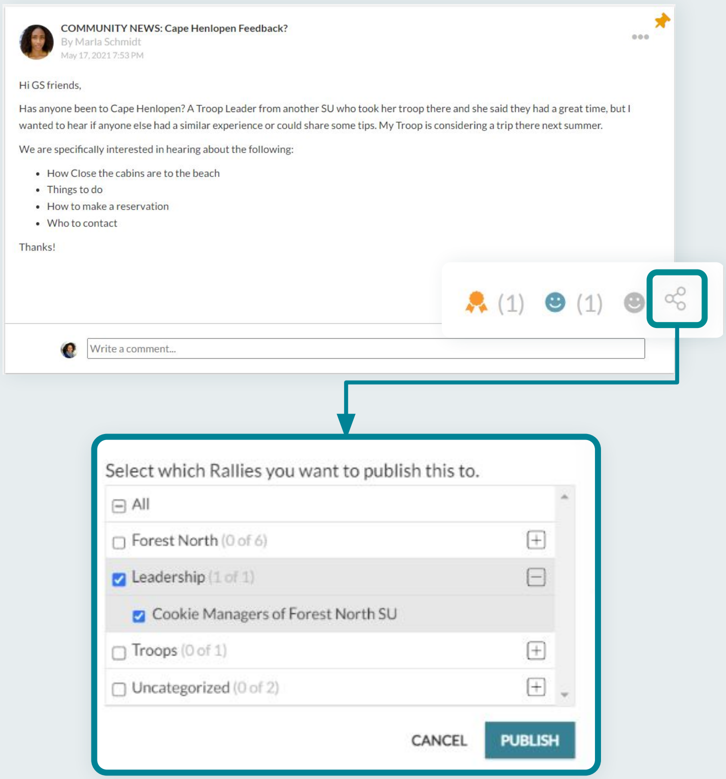
View Demo For Admins View Demo For Members

Continued

On the **"Message Wall"** all members can:

- View all message wall posts
- Click the **"React"** icon to express:
    - **Thank or Like**
- Type in the write a comment box to add a comment to the message
- Click the **"Share"** icon to share a message to another Hub or Rally.
    - The "Share" icon will open up the **"Share"** Modal, which enables the user to then select the Hubs and Rallies where they would like to share, by checking the box next to the Hub or Rally Name.

Click "**Publish.**"



Message Wall

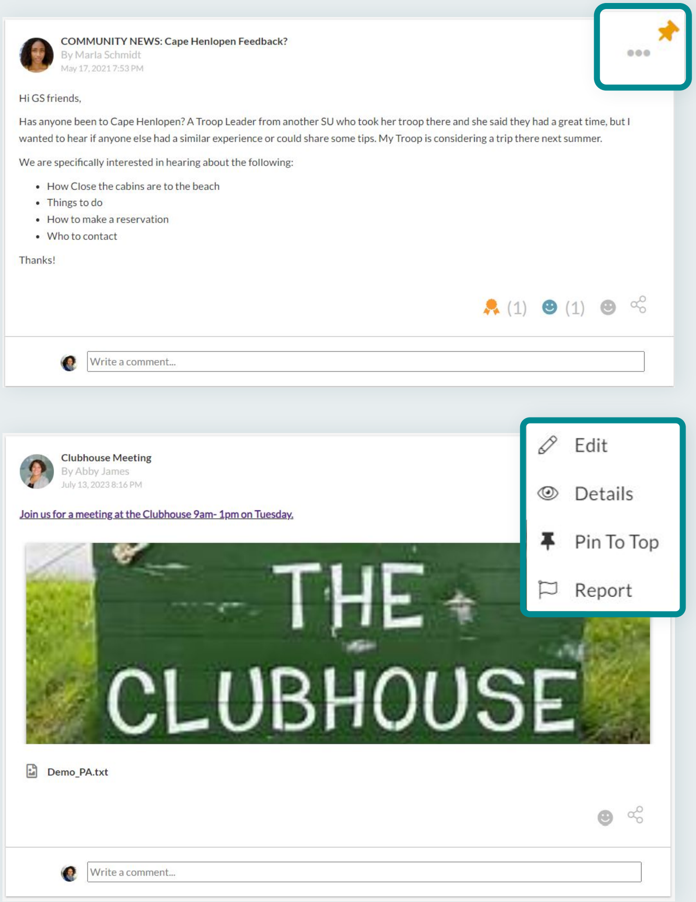
View Demo For Admins

View Demo For Members

Continued

For additional options, Click on the **"Ellipsis"** (3-dots).

- Admins and message creators will see the **"Edit"** capability where they can edit the message.
- All members of the Rally can view **"Details"** which informs the user if this is the original post or if it was shared from a different Rally, and if the post has been shared to other Rallies.
- Admins can also **"Pin to Top"** so important messages will relocate to the top of the message wall as the first message everyone sees. The **"Pin"** icon will appear on any pinned messages.
    - *Note*: Multiple messages can be pinned to the top.
    - *Note*: Pinned messages have the menu option to **"Unpin".**
- All members have the option to **"Report"** the message if they feel it is inappropriate. This sends an alert directly to the Rallyhood IT department who will remove it immediately.



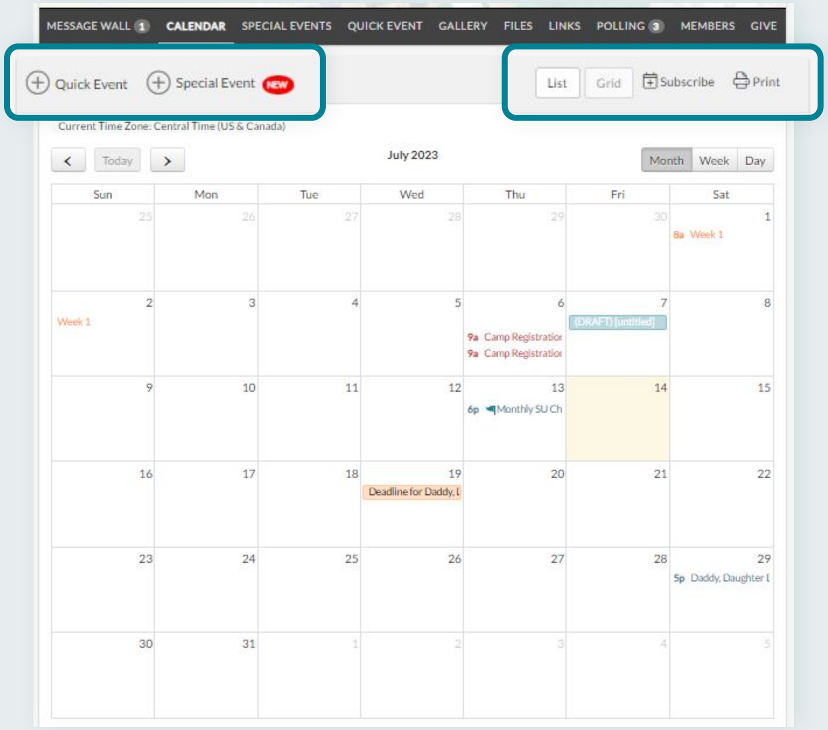
Calendar

View Demo

The Rally **"Calendar"** feature is for every member of the Rally. Members of Hubs and Rallies will see Hub and Rally calendar events in their personal **Dashboard** calendar. All members of the Rally have the ability to add, edit, and delete events.

- Users can choose their Calendar layout/view preference with the **"List and Grid"** buttons:
    - **"Grid"** View displays events in a traditional calendar layout.
    - **"List"** View displays all aggregate events in a vertical list.
- Clicking the **"Subscribe"** button will bring up instructions to conduct a one-way sync to import a Rally calendar into a personal calendar (iCal/Apple, Google, Outlook 2007, or Outlook 2010).
    - Subscribing to the **My Rallyhood calendar** will connect events from all Rally calendars for Rallies of which the user is a member.
- Clicking the **"Print"** button will prompt the user device to print the current month in the selected calendar display format.

In **Calendar**, there are two create options at the top left, **"Quick Events"** and **"Special Events."**



Quick Event

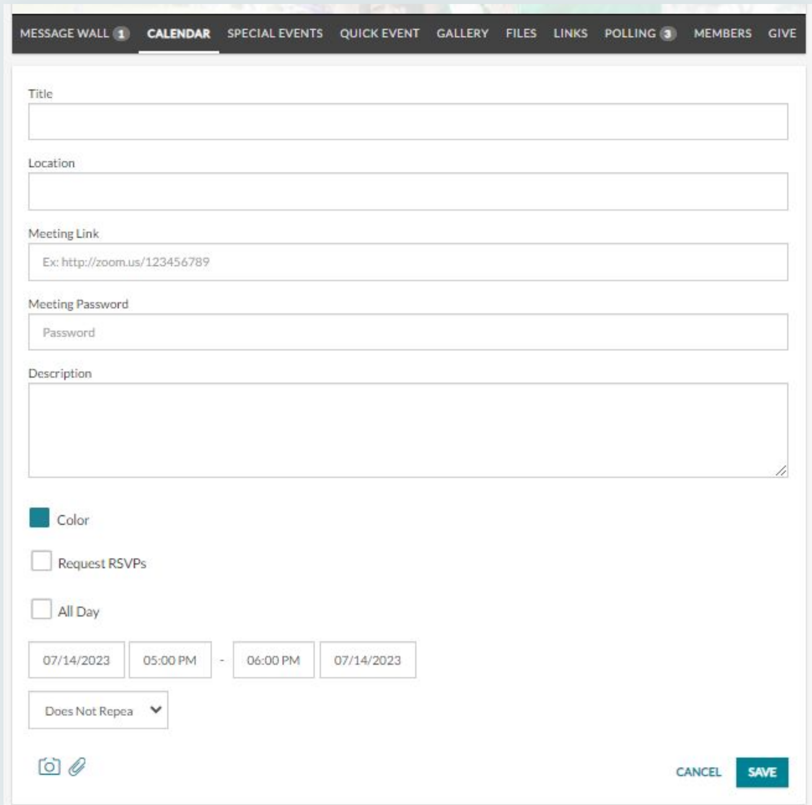
View Demo

Click **"Quick Event"** to create events that do not have a guest limit and do not require ticket purchase to attend.

Quick Event can include the following information:

- Event Title
- Event Location
- Meeting Link for virtual events
- Meeting Password for virtual events
- Description
- Color to display on the Rally calendar
- Request RSVPs
- Set the date and time or check **"All Day"**
- Frequency: The default is **"Does Not Repeat,"** clicking the down arrow will open options to set details for a recurring event
- Attach an image or file
- Click **"Save"** to publish the event to the Rally calendar

For information about how to create **Special Events**, please see the Special Events tutorial video in the next section.



Special Events

View Demo

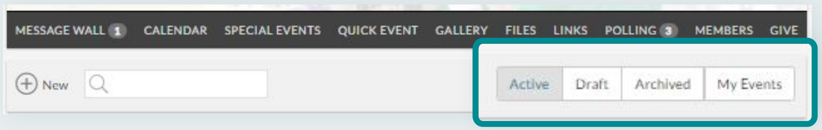
The **"Special Events"** feature offers the ability to design and create event pages that can include guest registration and multiple ticket options. Event organizers can use this tool to create, manage, promote, download reports, and set up payment processing.

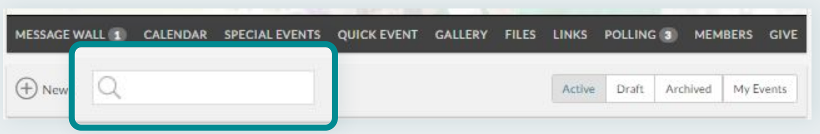
In the **Special Events** tab:

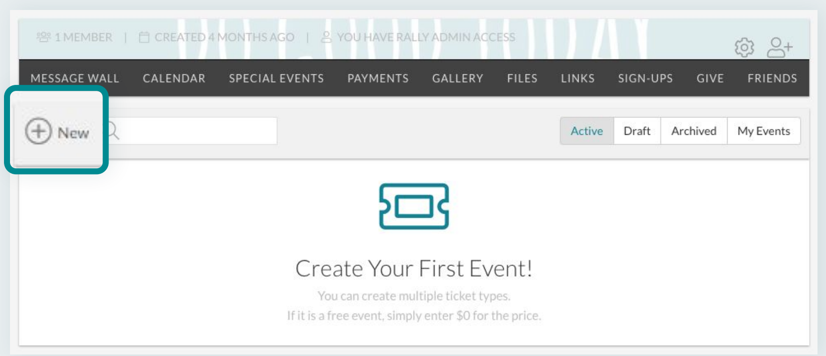
- Click **"Active", "Draft", "Archived" or "My Events"** depending on how you want your event to be displayed or not.
- Click **"Search"** to search specific Special Events by typing in a keyword.

To Create a **Special Event:**

- Click **"New"** to create a new **Special Event.**
- Or, If there are no events yet displayed, you can also click the **"Ticket"** icon to initiate the create process.







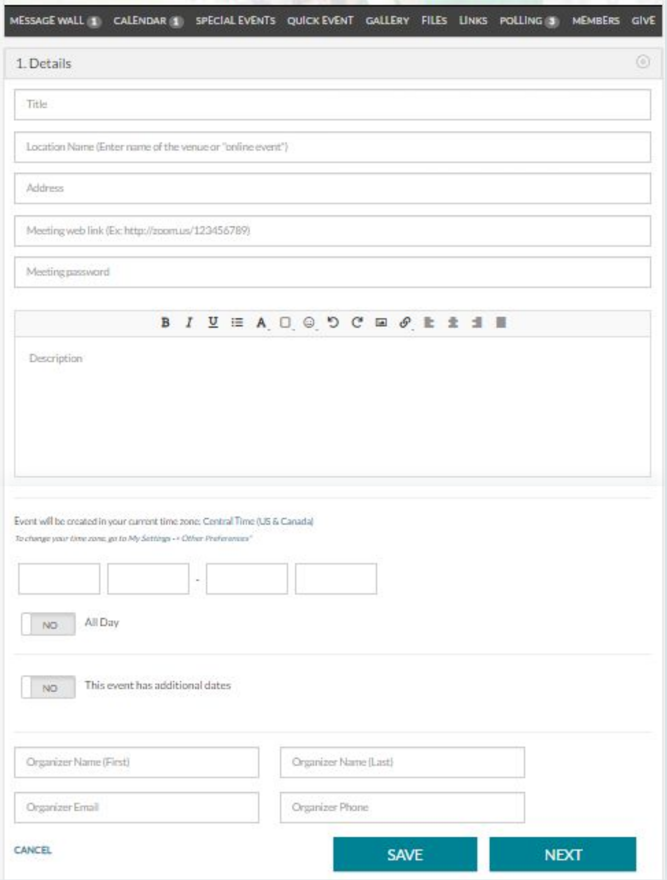
Special Events

View Demo

Continued

The “**Details**” section is where you will begin adding in the information:

- Event Title
- Event Location
    - **Address**: Filling in the street address will generate a map view in the event
- Event Title
- Meeting Link for virtual events
- Description
    - The description can be customized using the menu formatting options
- Start and End Date and Time or select **All Day**
    - Event creators should note that events are created in the time zone of the user’s profile settings
- Set additional dates for recurring events by selecting **“Yes”**
- Event Organizer name and contact information
- Click **“Save”** to save the event in Draft mode
- Click **“Next”** to proceed to the next section



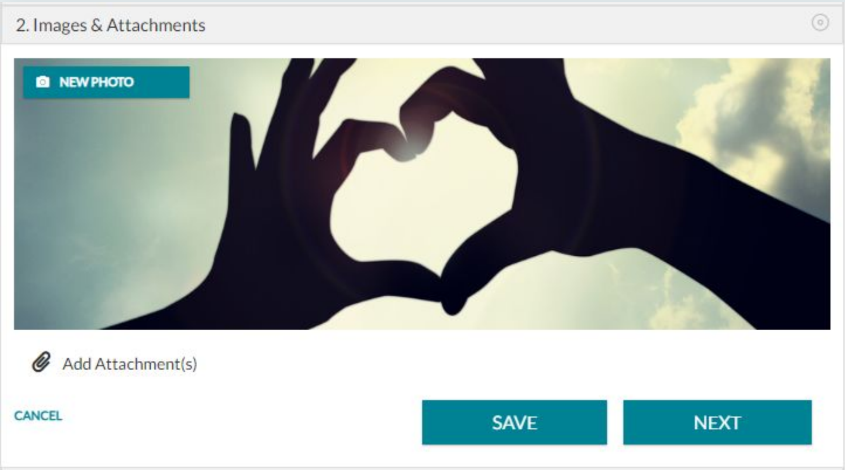
Special Events

View Demo

Continued

Click the **"Images & Attachments"** to add a banner image for the event and include file attachments.

- Click "**New Photo**" on the top left and select a photo or image from your computer for the event.
- Header image dimensions are 720-240 pixels or 10 x 3.3 inches.
- You can also click the **"Paper Clip"** icon to add any necessary documents that are relevant for your event.
- Click **"Save"** to save the event in Draft mode.
- Click **"Next"** to proceed to the next section.



Special Events

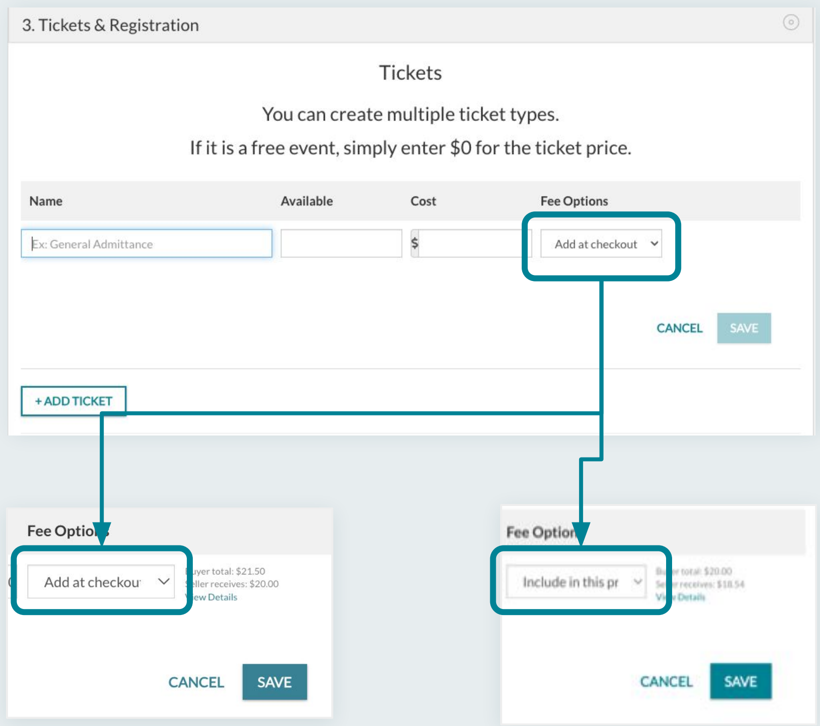
View Demo

Continued

Click the **"Tickets & Registration"** button to add tickets of various types and pricing tiers.

- Click **"Add Ticket"** to create a new ticket for the event. Multiple ticket types can be added to the same event:
  - Enter the ticket **Name**.
  - Enter the number of tickets **Available**.
  - Enter the **Cost** or price per ticket. Ticket price can be set to $0 if there is no cost.
  - Select the **Fee Options**:
    - Organizers have two options for how you want the fees to be paid:
      - Option 1: **"Add at checkout"**
        - This includes the fees as part of the ticket price that the buyer / payer would pay.
      - Option 2: **"Include in the ticket price"**
        - This includes the fees that the Organizer or Seller would pay.
  - Rallyhood is integrated with the third-party application, Stripe, to manage the financial transaction process.*

Click **"Save."**



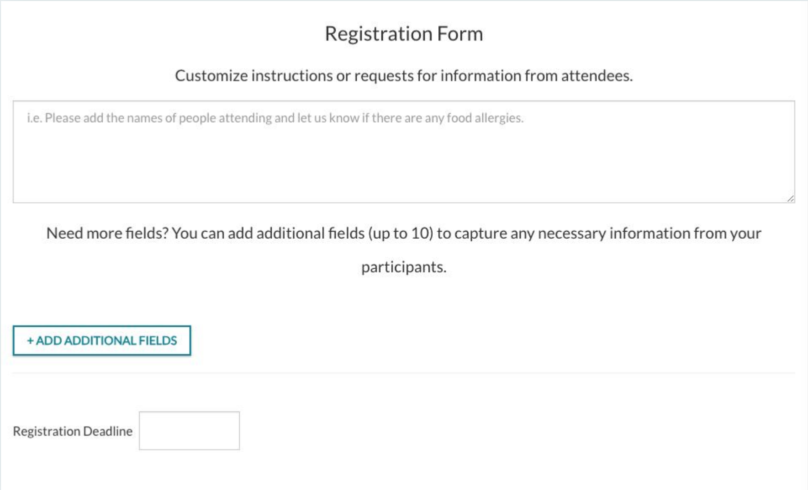
*Fee Structure:
Stripe payment processing fee = 2.9% + $.30
Rallyhood payment platform fee = 2.9%

Special Events

View Demo

Continued

- The **Registration Form** at check-out will collect the participants Name and Contact information.
- Organizers can also ask for additional information that might be necessary for a particular event.
  - Simply fill out the field with any special instructions.
  - If you have additional questions, or need to collect additional information, click **"Add Additional Fields"**
  - There are up to 10 separate customizable fields to utilize.
- Enter the **Registration Deadline** date, if applicable.

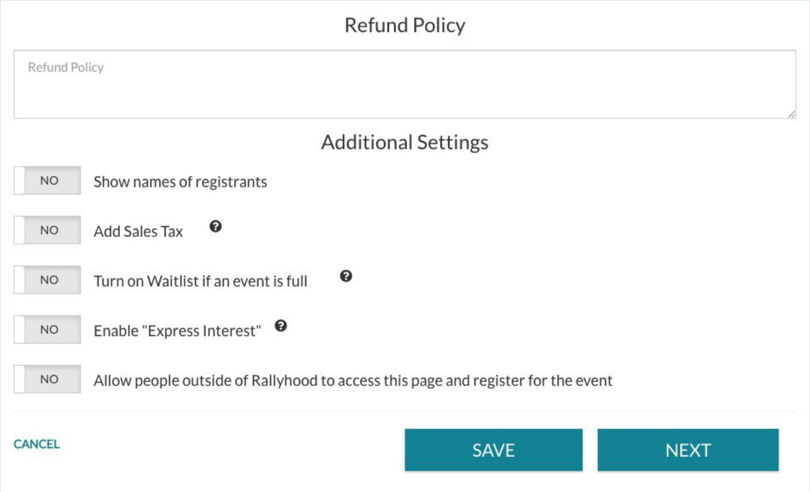


Special Events

View Demo

Continued

- You have the option to fill in the details for your **Refund Policy.**
- Set **Additional Settings:**
  - Select **"Yes"** to show **names of registrants** or **"No"** to hide.
  - Select **"Yes"** to Add **Sales Tax**, if applicable.
  - Select **"Yes"** if you would like to turn on the **"Waitlist"** feature to gather names if the event is sold out.
  - Select **"Yes" to** enable **"Express Interest"**. This option helps participates let the Organizer know they are interested but not ready to pay for the event. This also allows them to share a payment link to a Treasurer or Money Manager if that is relevant to the group.
  - Select **"Yes"** to allow people outside of Rallyhood to access the Event Page and Register for the event.
    - Public events will display shareable link-above the Register button.
- Click **"Save"** to save the event in Draft mode.
- Click **"Next"** to proceed to the next section.



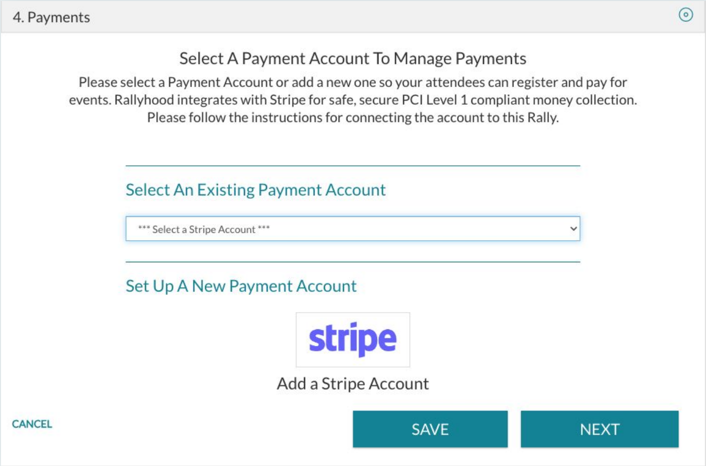
Special Events

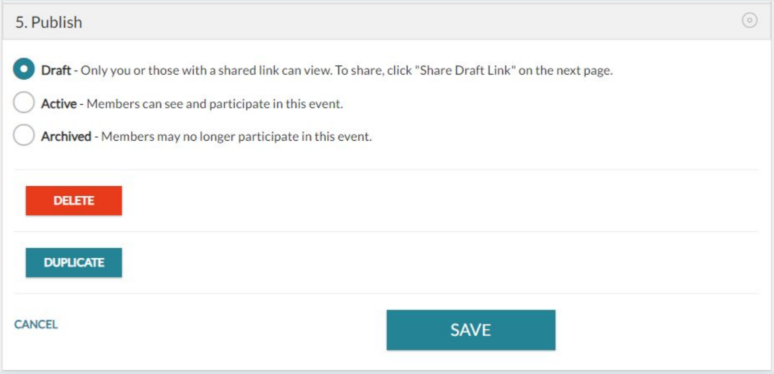
View Demo

Continued

- Click **"Payments"** to add or create a Stripe Account for ticket payment processing.
  - If the ticket price is free ($0), this step can be skipped to publish the event.
  - If the tickets have a price, the event organizer will be prompted to select an existing stripe account or set up a new Stripe account.
    - For more information, please refer to the Stripe Set Up section in this user guide and tutorial video.
- Click **"Publish"** to:
  - Save the event as:
    - **Draft**
    - **Active**
    - **Archived**
- Click **"Delete"** to delete the event.
- Click **"Duplicate"** to duplicate the event.

Special Events may also be accessed from the Calendar tab by clicking **"Special Events."**





Gallery

View Demo

The "**Gallery**" feature is where all Rally members can create albums to share photos with each other.

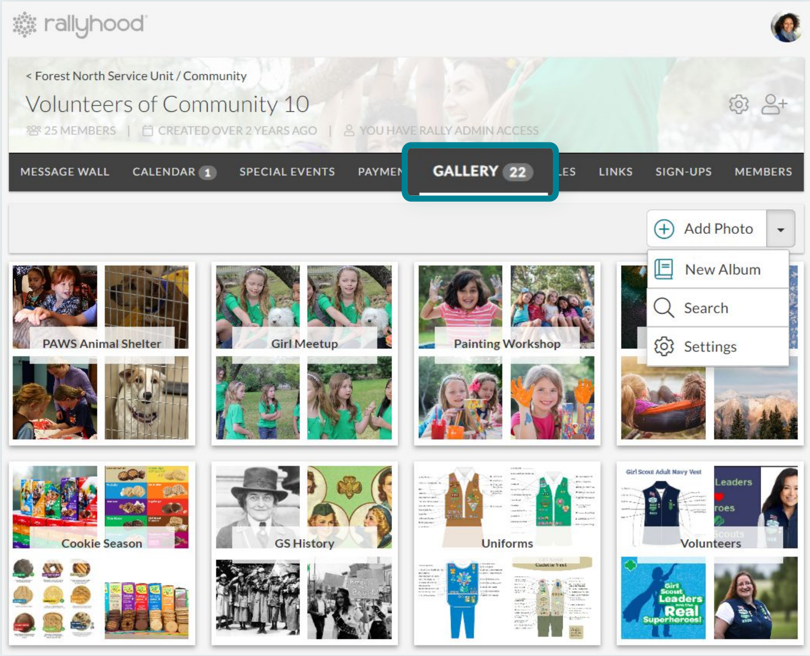
To add a new photo to the Rally:

- Click **"Add Photo"** to upload a photo from your computer or phone. You can also drag and drop a photo anywhere on the page.

Click the drop-down arrow next to **"Add Photo"**

- Click **"New Album"** to create a new photo album.
- Click **"Search"** to search for albums.
- Admins can also click **"Settings"** to adjust the **Gallery Feature settings**.

Be sure to click **"Save"** when making changes in **Gallery**.



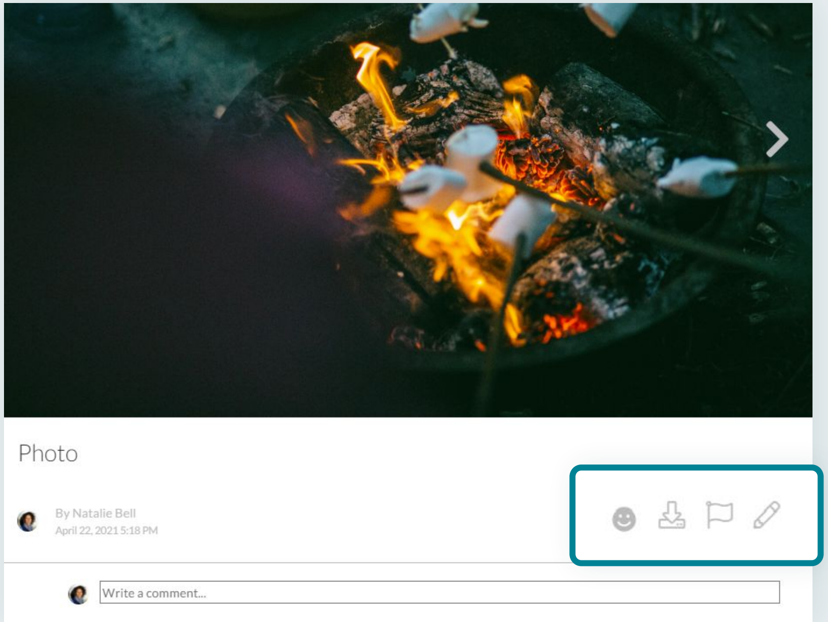
Gallery

View Demo

Continued

Once Photos and albums are created, all members of the Rally can:

- View photos and albums.
- **"Write a Comment"** to interact with other members about the photo.
- **"Drag and drop"** photos into albums and add albums into other albums to nest them.
- Click the **"Like"** icon to express **Like** or **Thank**.
- Click the **"Download"** icon to download photos.
- Click the **"Flag"** icon to flag as inappropriate.
- Click the **"Pencil"** icon to Edit or Delete photos and albums.



Files

View Demo

The **"Files"** feature is a place for Rally members to access shared digital resources such as forms. meeting notes, event handouts and resources.

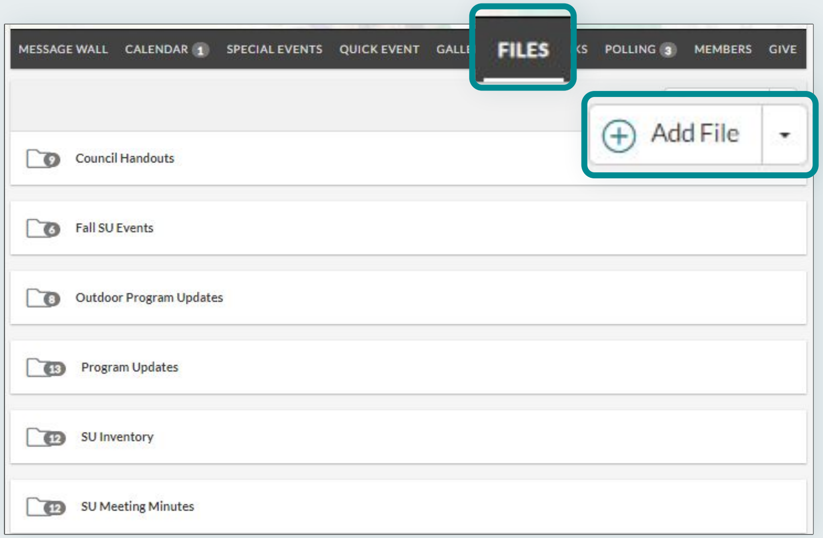
Any member of a Rally has the ability to view, upload, and download files as well as create folders and subfolders, unless the Admin changes permissions to be Admin only.

To add a file, click **"Add File"** or drag and drop the file anywhere on the page.

- Rallyhood supports the below file types:

avi	mov	rar
bmp	mp3	rtf
csv	mp4	tar
doc	mpeg	txt
docx	mpg	wav
eps	numbers	wma
gif	odt	wmv
gz	pages	xls
jpeg	pdf	xlsx
jpg	png	zip
kml	ppt	
mkv	pptx	

- The file size limit is 100 MB (megabytes).



Files

View Demo

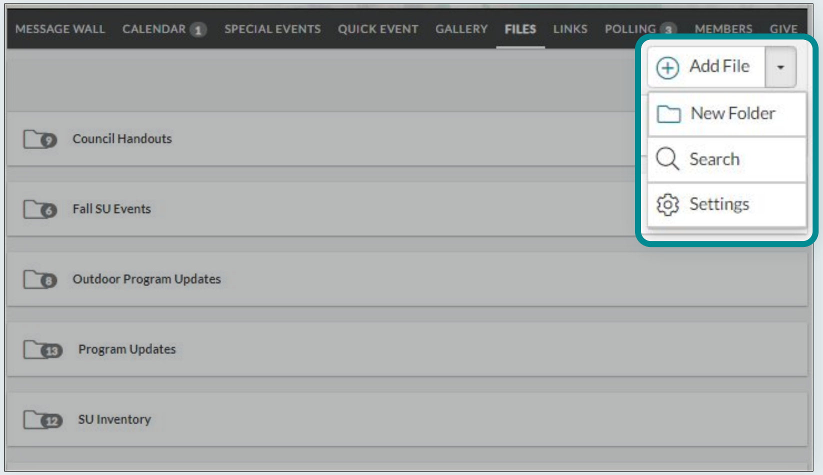
Continued

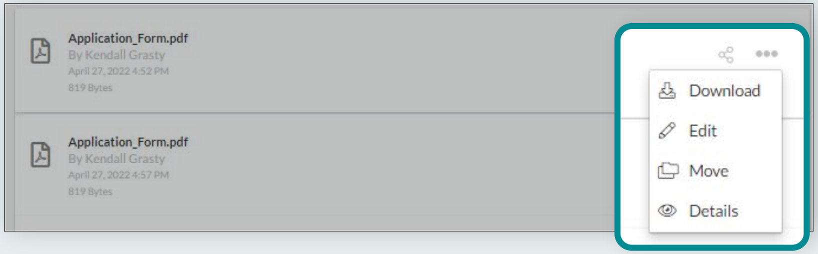
To upload Folders or Files, click the drop-down arrow next to **"Add File"**:

- Click **"New Folder"** to create a new folder.
- Click **"Search"** to search for existing folders.
- Admins can also click **"Settings"** to adjust the Files Feature settings.

Once Files and Folders are created, all Rally members can:

- View and download **Files and Folders.**
- Click **"Share"** to share **Files and Folders** to their other Hubs and Rallies.
- Click the 3-dot **"Ellipsis"** to view options:
    - Click the **"Download"** icon to download a local copy of the file.
    - Click the **"Pencil"** icon to Edit or Delete Files and Folders.
    - Click the **"Move"** icon to relocate the File storage location.
        - Users can also **"Drag and Drop"** Files and Folders to relocate them.
        - To Un-Nest, drag and drop the File or Folder to **"Back to Files"**
    - Click **"Details"** to view the **File history details**.





Links

View Demo

The “**Links**” feature is a place to house URLs that are relevant to the group, giving them quick access.

To add a Link click **“Add Link”**

- Type or copy & paste a website URL into the space provided.
- Then click **“Save.”**
- If the link is a YouTube URL, Rallyhood has YouTube integration and the video will launch, and play in Rallyhood without ads.

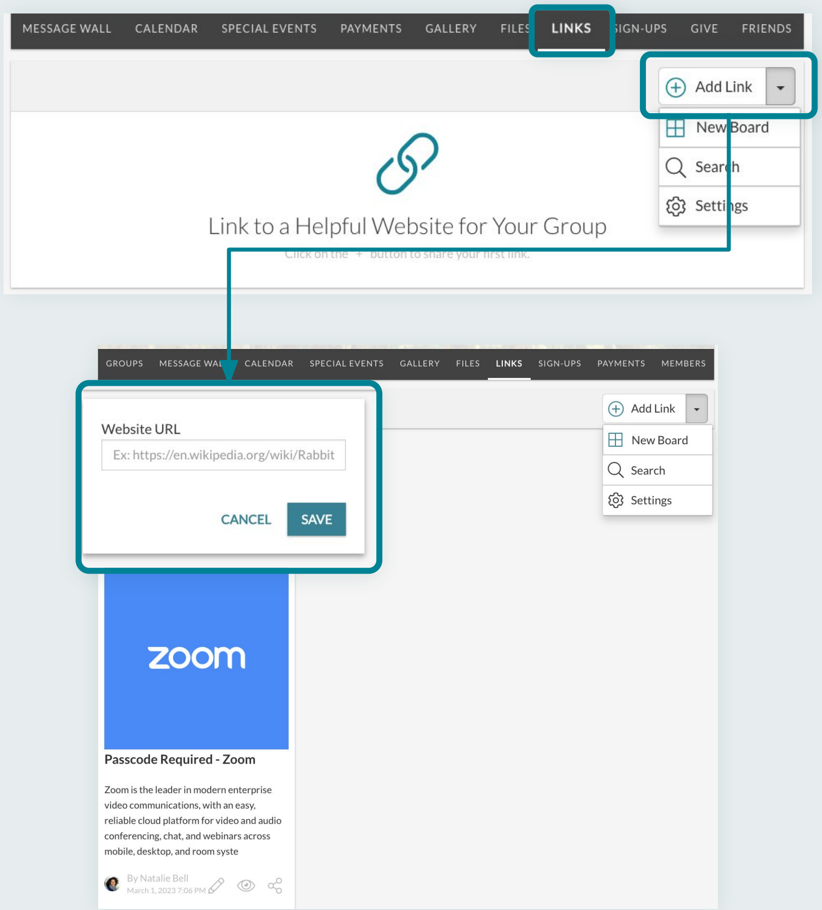
To create a **“Board”** (a group of related **Links)**, simply click the drop-down arrow next to the **“Add Link”** and select **“New Board”:**

- Title the **Board** and click **“Save”.**
- Click the **Board** to open it.
- Click **“Add Link”** to add a link directly into the Board.
  - Links can also be dragged and dropped into Boards from the Links landing page.

Once Links and Boards are created, all Rally members can:

- Click **“Share”** to share the Link or Board to your other Hubs and Rallies.
- Click **“Details”** to view the Board history Details.
- Click **“Edit”** to Edit or Delete Links and Boards.
- Click **“Search”** to search for Boards by keyword.

Admins will see **“Settings”** to adjust the Links Feature settings.



Sign-Ups

View Demo For Admins

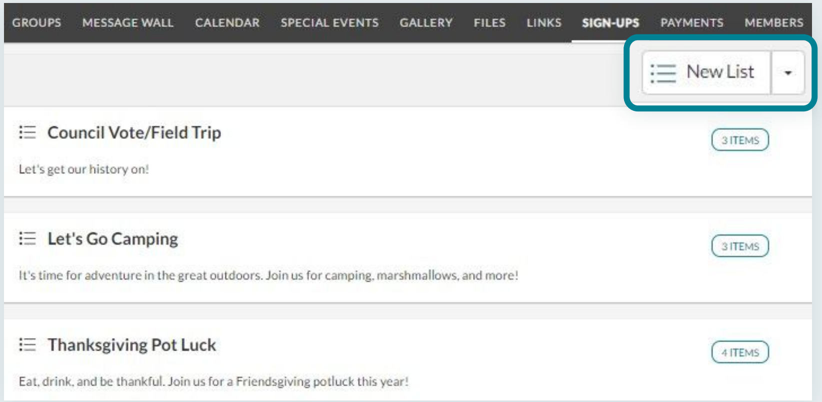
View Demo For Members

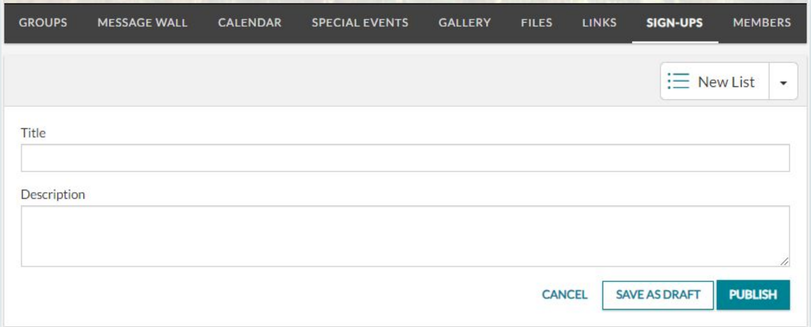
The **"Sign-Ups"** feature can be used to coordinate group efforts for organizing volunteer shifts, assignments, bringing items, or gathering feedback and voting.

The process is to first create a **New List,** and then to create the **Sign Ups** that are organized underneath the **List**.

To create a Sign-up:

- Click **"New List".**
- Type the Title for the **Sign-Up List.**
- Type a Description with details for the **Sign-Up List.**
- Click **"Save As Draft"** if it is not ready to be published and accessible by Rally members.
    - Draft Lists can be accessed by clicking the drop-down menu next to **"New List"** then clicking **"Draft."**
- Click **"Publish"** if you are ready to share it with Rally members.





Sign-Ups

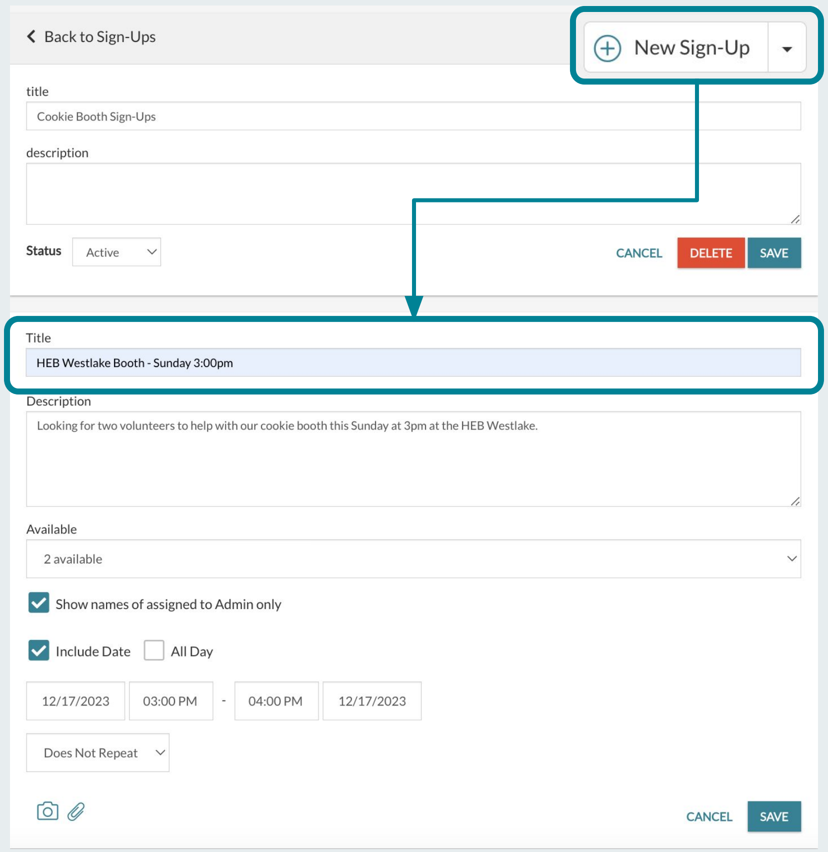
View Demo For Admins | View Demo For Members

Continued

Now that you created the **"Sign-up List,"** you are ready to create your **"Sign-Up Options."**

Simply click **"New Sign-Up"** on the top right of the page to create different options like shifts or slots.

- Type a Title of the option (e.g. shift #1 or slot 3pm-4pm).
- Type a Description.
- Set the number of available slots or shifts or set to **"No Limit"** which is good for voting or polling scenarios.
- Click the box to choose whether to **"Show names of assigned to Admin only"** or not:
  - Leaving the box unchecked will keep the names visible to all members of the Rally..
  - Checking the box will keep names hidden to everyone except Rally Admins.
- Check **"Include Date"** if the Sign-Up is for a specific date:
  - Set the Frequency; the default is **"Does Not Repeat"**
    - Click the down arrow to set details for a recurring event.
- Attach an image or file to the Sign-Up.
- Click **"Save"** to publish the new option underneath the Sign-up LIst.



Sign-Ups

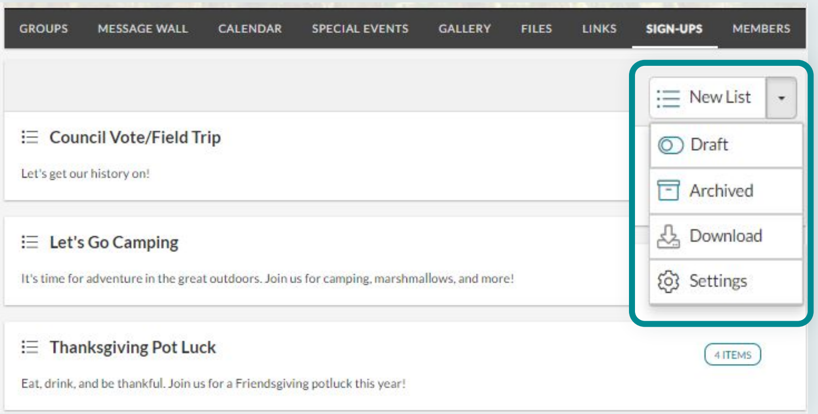
View Demo For Admins | View Demo For Members

Continued

Once a Sign Up List is created, you have additional actions for viewing.

Click the drop-down arrow next to the **"New List"** button to do the following:

- Sort the sign-up list to view only the ones in **Draft** mode.
- Sort the sign-up list to view only the ones that are **Archived.**
- **Download** a sign-up list.
- Admins can also see a **"Settings"** option to adjust the Sign-Ups Feature settings.



Members

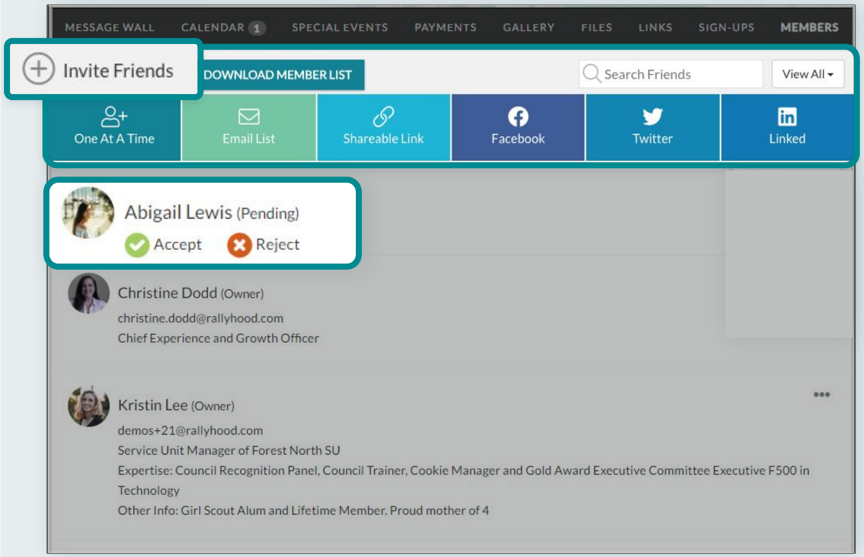
View Demo For Admins | View Demo For Members

The **"Members"** section lists Rally members who are part of the group.

- Members can view profile summaries of other members.
- They can also initiate private messaging with one another.

Admins can view join requests and **"Accept"** or **"Reject"** as needed. These requests will always appear at the top of the Members page.

- Admins can also change a Members status from "Friend" to "Admin," or "Admin" to "Friend," for example.
- Admins can click **"Invite Friends"** at the top left of the page to add members to the Rally. Alternatively, Admins can click the **"Add Member"** icon next to the Rally settings gear icon to initiate the same options for inviting members to the Rally.
- The options for inviting members are:
  - **"One At A Time"** is for generating an invitation email to one individual person by adding their name and email address.
  - **"Email List"** is for generating an invitation email to multiple people at once. Limit to 25 email addresses per list.
  - **"Shareable Link"** is for copying a shareable invitation link that can be sent to individuals you would like to join the Rally.
  - Click one of the social buttons to post an invitation message directly to social media outlets.



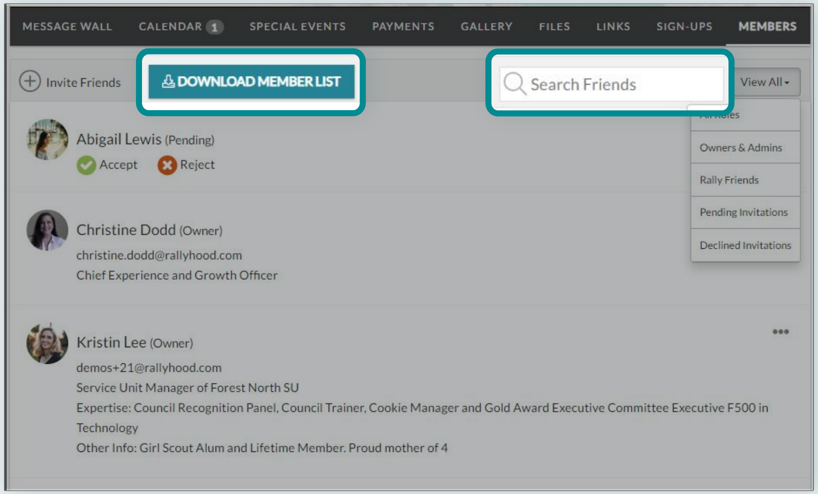
Members

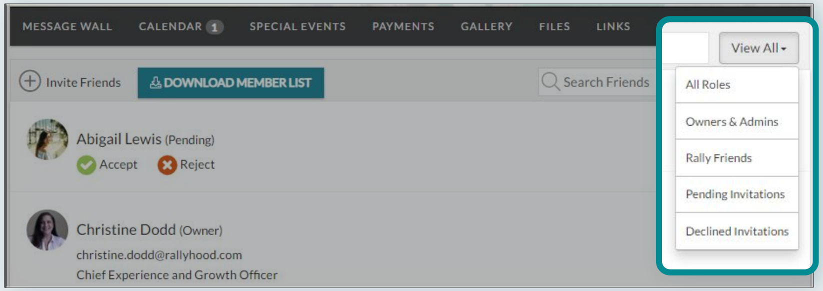
View Demo For Admins

View Demo For Members

Continued

- Admins can click **"Download Member List"** to generate a CSV file with member profile information.
- All Rally members can type a name or email address to **"Search Friends."**
- All Rally members can click **"View All"** to refine the member list view by choosing from the options.
- Members (Non-Admins) will not be able to see **"Declined Invitations."**





Members

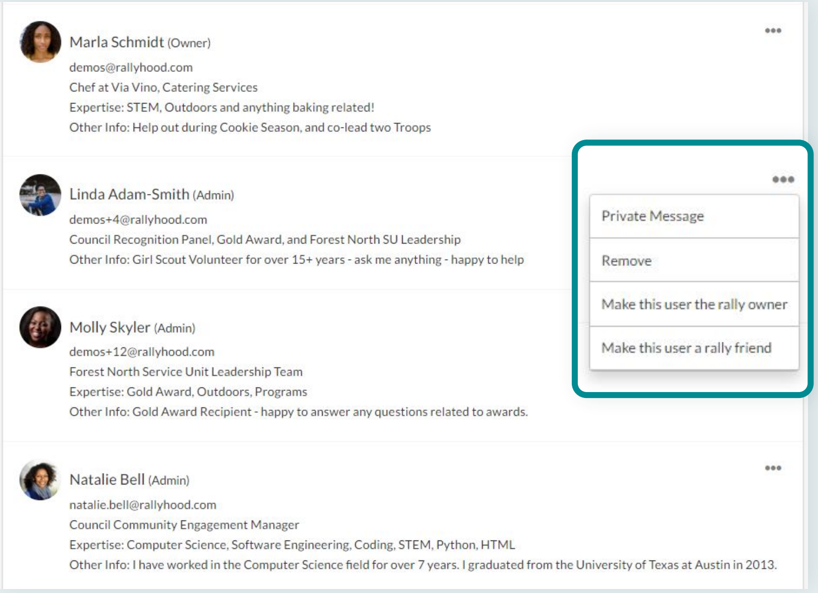
View Demo For Admins

View Demo For Members

Continued

To the right of a Members name, the **"Ellipsis"** opens up additional options:

- All Rally members can **"Private Message"** other members of the Rally.
- Admins have the ability to **"Remove"** a member from the Rally.
- Admins have the ability to change a person's role:
    - If the person's Role is "Friend", Admin can **"Make this user a Rally Admin."**
    - If the person's Role is "Admin", another Admin can upgrade their role to **"Make this user a Rally Owner":**
        - Only "Owners" of a Rally can delete a Rally.
        - If the person's Role is "Admin", another Admin can change their role to **"Make this user the Rally Friend."**
        - Friends can view and contribute by adding content, but cannot manage content or people.



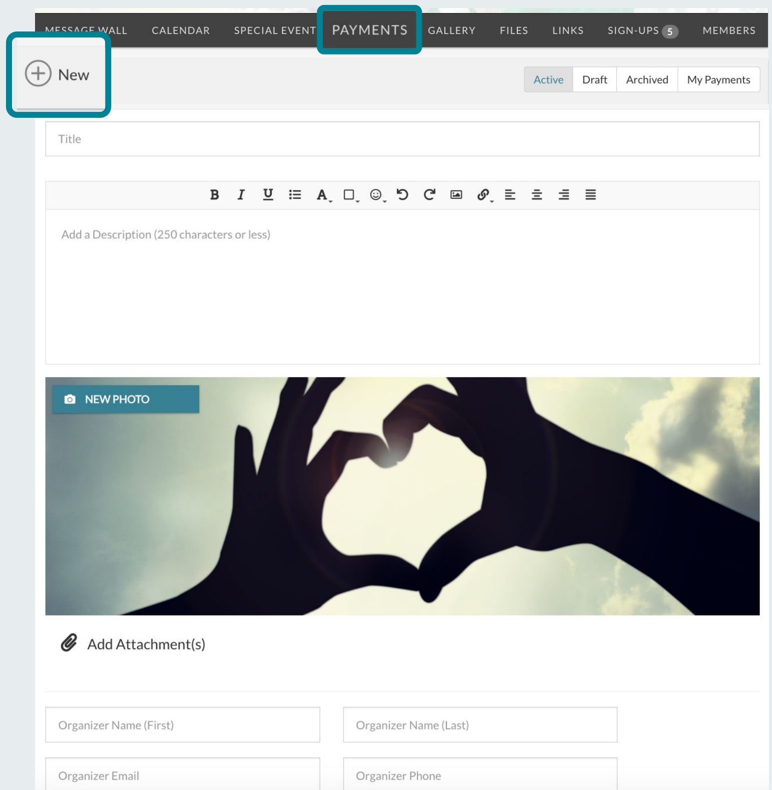
Payments

View Demo

The **"Payments"** feature designed for money collection for things like fundraising activities.

Click **"New"** to create a new **Payment**.

- Type a **Title** for the Payment.
- Type a **Description** and customize using the formatting menu.
- Click **"New Photo"** to add a **banner image** to the Payment.
  - Banner image dimensions are 720 x 240 pixels or 10 x 3.3 inches.
- Click **"Add Attachment(s)"** to add files
- Add the Payment Organizer's name and contact information.



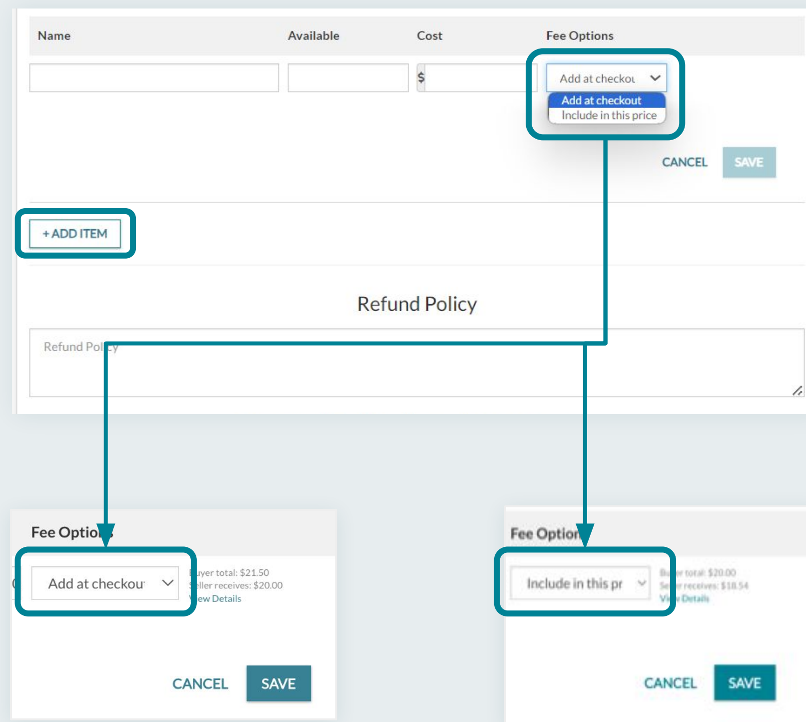
Payments

View Demo

Continued

Click **"Add Item":**

- Add the **Name**, or Title, for the **Payment** request.
- Type quantity / how many are **available**.
- Type the **cost** per item in USD.
- Select the **Fee Options**:
  - Organizers have two options for how you want the fees to be paid:
    - Option 1: **"Add at checkout"**
      - This includes the fees along with the ticket price that the buyer / payer would pay.
    - Option 2: **"Include in this ticket price"**
      - This includes the fees that the Organizer or Seller would pay.
- Rallyhood is integrated with the third-party application, Stripe, to manage the financial transaction process.
- Provide details for your organization's refund policy.



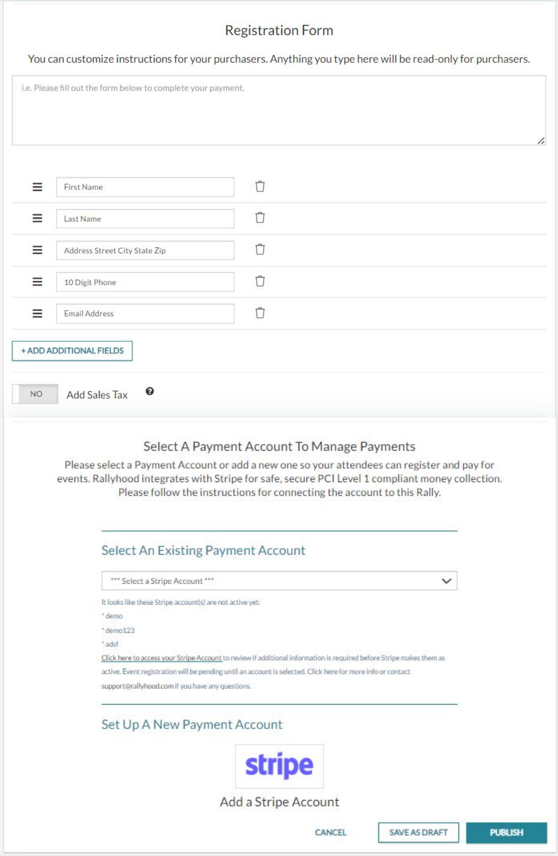
*Fee Structure:
Stripe payment processing fee = 2.9% + $.30
Rallyhood payment platform fee = 2.9%

Payments

View Demo

Continued

- Add **Registration Form** details, if applicable.
- Add **Additional Fields** or instructions, up to 10 total.
- Add **Sales Tax**, if applicable.
- Add or create a Stripe account for payments.
  - For more information, please refer to the Stripe section in this user guide and the tutorial video.
- Click **"Save as Draft"** to keep editing.
- Click **"Publish"** to make accessible / live.



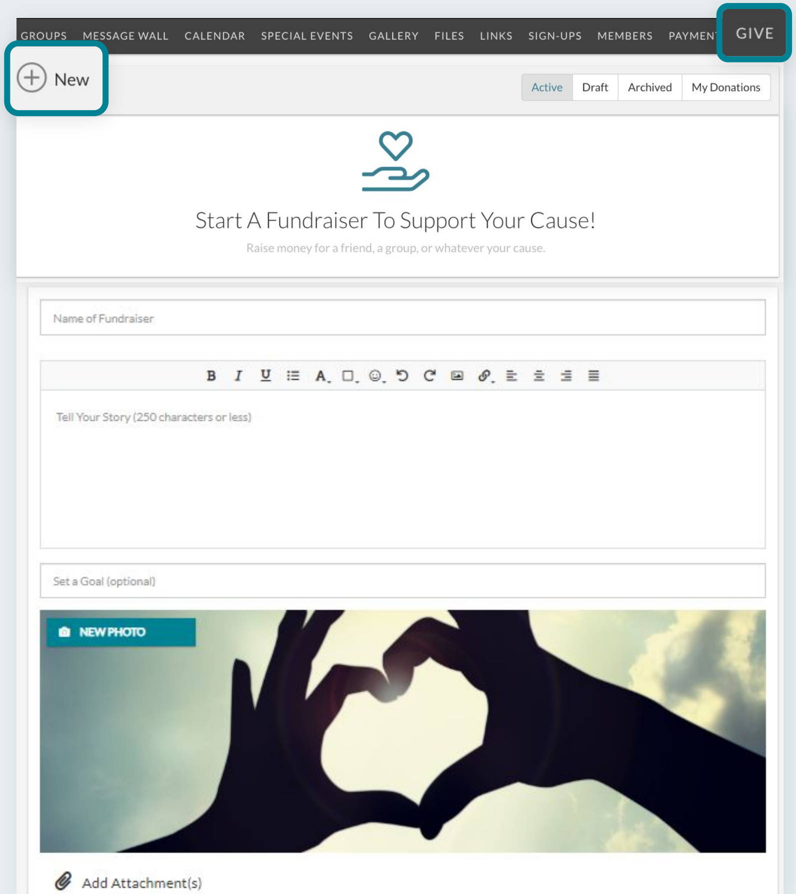
Give

View Demo

The **"Give"** feature is a space to set up a fundraiser for supporting causes and raising money.

Click **"New"** to create a new **Give fundraiser**.

- Add a Name or **Title** for the Fundraiser.
- Add a **Description** to tell a **Story** about your fundraising activity.
  - This can be customized using the menu formatting options.
- Set a **Goal** for the amount of money desired to be raised.
- Click **"New Photo"** to add a **banner image** to the Fundraiser.
  - Banner image dimensions are 720 x 240 pixels or 10 x 3.3 inches.
- Click **"Add Attachments"** to add files.

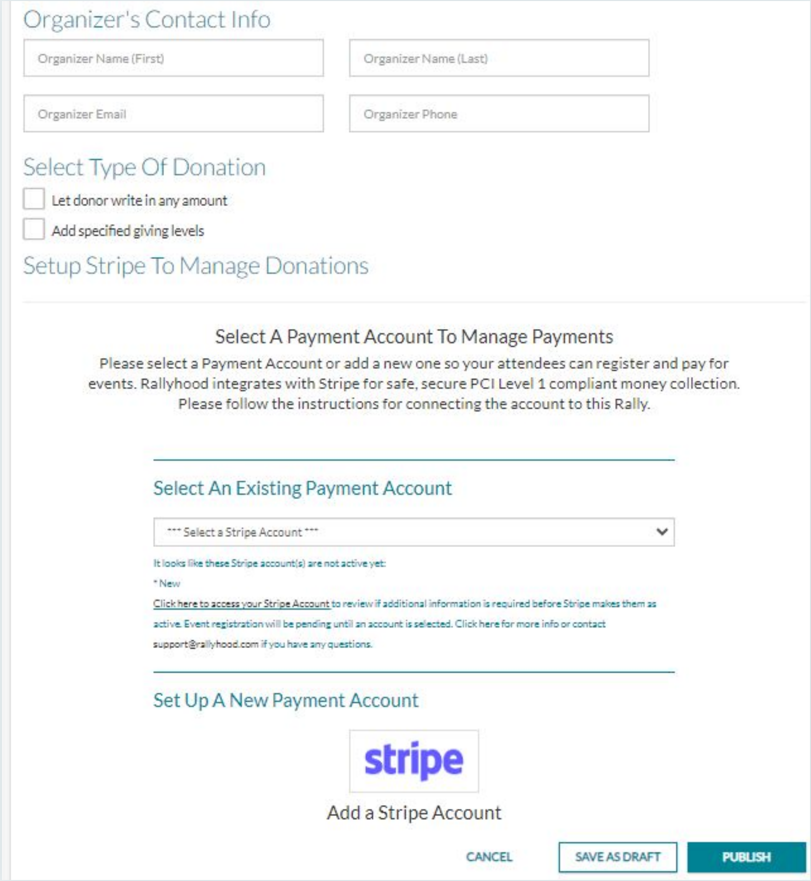


Give

View Demo

Continued

- Add the Fundraiser Organizer's name and contact information.
  - Select the Type of Donation:
    - **"Let donor write in any amount."**
    - **"Add specified giving levels."**
  - If you select the **"giving levels"** option, click **"Add Donation Level"** to add details.
- Add or create a Stripe account for ticket payment processing.
  - For more information, please refer to the Stripe section of this user guide and tutorial video.
- Click **"Save as Draft"** to keep editing.
- Click **"Publish"** to make accessible / live.



rallyhood®

Stripe Account Set-Up

Stripe Account Set-Up

View Demo

Stripe is a PCI-Level 1 Service Provider and performs dual verification for all new accounts.

We have created video for you with step-by-step instructions for Setting Up your Stripe Account.

Click the above **"View Demo"** button to get started.

Set up Your Stripe Account to Collect Payments on Rallyhood!

Rallyhood has chosen Stripe as its payments processing platform because of its best-in-class security tools and certifications, as well as its years as the market-leader, empowering millions of business and individuals to collect and make payments.

Once you set up your Stripe Account, you can collect money for Events, Dues, or Fundraising and more in Rallyhood.

Stripe Account Set-Up

View Demo

Continued

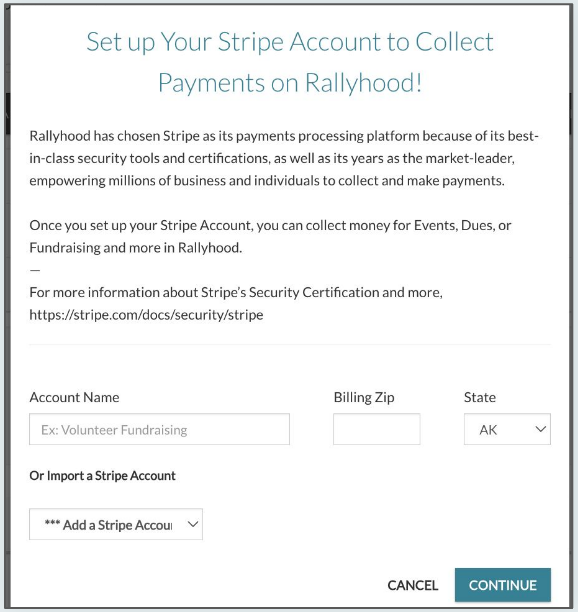
Here's a checklist of information you will need to have on hand when setting up your Stripe Account.

Council Information:

- Council Name
- Council EIN #*
- Council Business Address
- Council Phone #
- Council Website URL
- Council Customer Support Phone #
- Council Customer Support Address

Organizer Information:

- First and Last Name
- Email Address
- Role or Title
- Date of Birth
- Home Address (associated with your GS Bank Account)
- Phone #
- Last Four Digits of Social Security #
- GS Bank Account Routing #
- GS Bank Account #
- Business Name (e.g. Troop 1234, GSJS) that corresponds to the Rally Name



*If you are a Troop Leader and not sure of your Council EIN #, you can contact your Service Unit Manager or Council Staff.

As part of Federal Regulations, Stripe requires you to verify your identity with: Date of Birth, Home Address, Mobile phone number, Last 4 digits of SS Number. This is for Stripe Accounts only. Stripe is a PCI - Level 1 Service Provider, which is the highest levels of security compliance. Rallyhood does not store this data.

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Together, we can do great things!

Thank you!