



## Livingtree – Bookkeeper Quick Start Guide

Crowdfunding is the practice of funding a project or idea by raising small amounts of money from a large number of people, typically via the Internet. This quick start guide will help bookkeepers understand the how to use Livingtree as a crowdfunding resource and how to approve campus campaigns.

### Schools

Every Austin ISD school has its own [Livingtree](#) account for crowdfunding, communications, volunteer sign up and events. The principal at each school is the owner of the account and has full responsibility for the crowdfunding campaigns. Austin ISD teachers have login access to their campus page and can create individual fundraising campaigns. The principal may add additional authorized users, including bookkeepers, teachers, and staff. All school-based crowdfunding campaigns must first be approved by the school bookkeeper and principal before the campaign is published on the Livingtree site.

### PTAs

Because PTAs and schools often work closely on fundraising efforts, the district has authorized one PTA account per school. PTAs have their own login credentials, can create crowdfunding campaigns and events, manage donor lists, create volunteer opportunities and market fundraising campaigns. Funds raised are directly deposited into the PTA's PayPal account. All school-based crowdfunding campaigns must first be approved by the school principal before the campaign is published on the Livingtree site.

### School Based Crowdfunding Campaigns

Campaigns follow a two-step approval process:

1. **Bookkeeper Review** – Once a teacher creates and submits a campaign, the bookkeeper will receive an email notification to log into Livingtree and assign an accounting code related to a campus activity account. The bookkeeper then notifies the principal that the campaign is ready for approval.
2. **Principal Approval** – After bookkeeper review, the principal will receive an email notification to log into Livingtree for final approval. Once approved, the campaign will be published on the school's Livingtree page.

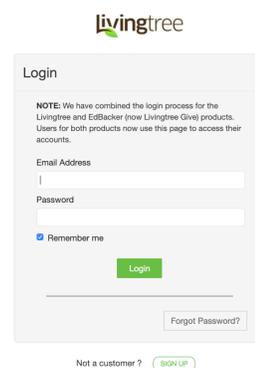
### PTA Crowdfunding Campaigns

Campaigns follow a one-step approval process:

1. **Principal Approval** – PTA campaigns will automatically be sent directly to the school principal for approval before they are published on the school's Livingtree page.

As the bookkeeper of your school, you are responsible for identifying the correct campus student activity accounting information for each Livingtree crowdfunding campaign.

1. Log into Livingtree
  - Go to [learn.livingtree.com](http://learn.livingtree.com) and click on the Log In button at the top of the page. Enter your Austin ISD email address and password.
  - If this is your first time using Livingtree, click Forgot Password. You will receive an email to your Austin ISD email address with a link to reset your password.
  - If your Austin ISD email address is not registered with Livingtree, please contact Ryan O'Donnell at [ryan.odonnell@austinisd.org](mailto:ryan.odonnell@austinisd.org) to start a new account. **Do not create your own account!**
2. Click on Accounting Codes in the left-hand column.
3. To see a preview of the campaign, click the Preview button. Enter a note in the Accounting Code box related to the campaign. The accounting code will be based on the campaign that is being created. For example, if the 3rd grade class is raising money for a field trip, you can enter "3<sup>rd</sup> Grade Activity Fund" as the accounting code.
4. Once accounting code has been inputted, submit the campaign for principal approval.



### District Process

The process for receiving donations was created in conjunction with Austin ISD Finance. All monthly crowdfunding donations raised for a specific campaign during a month are deposited into the campuses Wells Fargo KEV account. This typically happens during the first two (2) weeks following the previous month. For example, donations raised during the month of February would appear on a campuses March Wells Fargo bank statement.

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Because this deposit is restricted to a specific crowdfunding campaign, the campus bookkeeper will need to transfer these funds into a campus activity account designated to the particular crowdfunding campaign. This will allow the campus to use a district AMEX Purchase Card (PCard) or a PO to purchase items specific to the campaign budget and easily provide any requested information regarding a campus' purchases for such campaign.

*Please note that it can take up to 30 days for donated funds to be deposited in your school account. Tax receipts acknowledging the donation will automatically be sent to donors via email.*

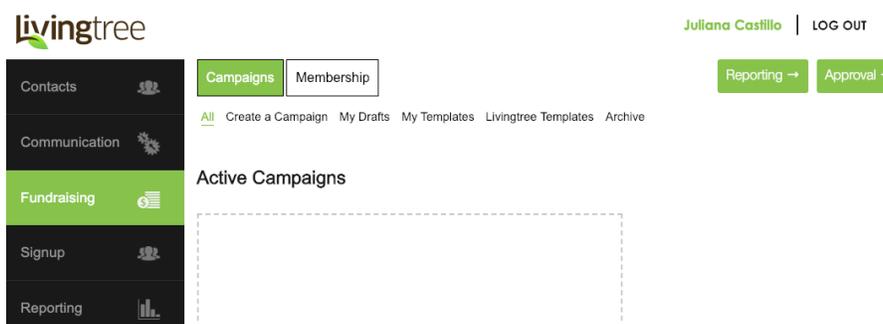
Questions regarding your campus Wells Fargo KEV account should be directed to Martha Ladyman or Esther Bull in Finance. Questions regarding your campus activity accounts should be directed to Tina Montgomery in Finance.

### PTA Process

Donations made to PTA-sponsored campaigns will be processed through the individual PTA's PayPal account, which means bookkeepers are not part of the approval process for PTA

### View reports in Livingtree

Click on Fundraising in the left-hand column and click on Reporting in the top right.



You will now be directed to the crowdfunding reporting section.



The main page will display the total number of payments, total donation amount, average donation amount, total number of campaigns, total number of donors, and total percentage of goal amount raised, along with a list of all of donations.

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Use the dropdown menu to customize the crowdfunding report. Users can create reports based on campaign name, dues, events, or time frame.



All Livingtree reports can be exported as either as an Excel file or as a PDF by using the export buttons at the top of the chart. Use the Excel file to sort the list as necessary.



*Need help? Email [support@livingtree.com](mailto:support@livingtree.com) or call (512) 957-2313 (extension #2) for additional support using the Livingtree platform.*