User Manual

WishWell

Powered by ONEGIFT
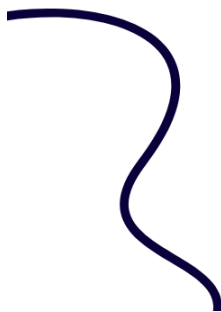
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Getting Started – Logging in

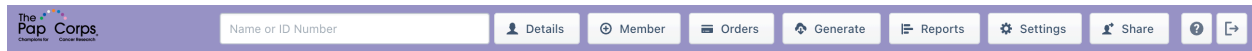To login to WishWell, go to https://wishwell.ai, click "Login" at the top right of the page, type in your username (it will be your email) and password on the left side of the screen and press login.

If you forgot your login, or are not sure if you have an account, press the "I forgot my password" below the Login button, enter in your email in the popup, and WishWell will send you an email (make sure to check spam) with a link that will allow you to reset your password. If you don't receive an email, you likely don't have an account.
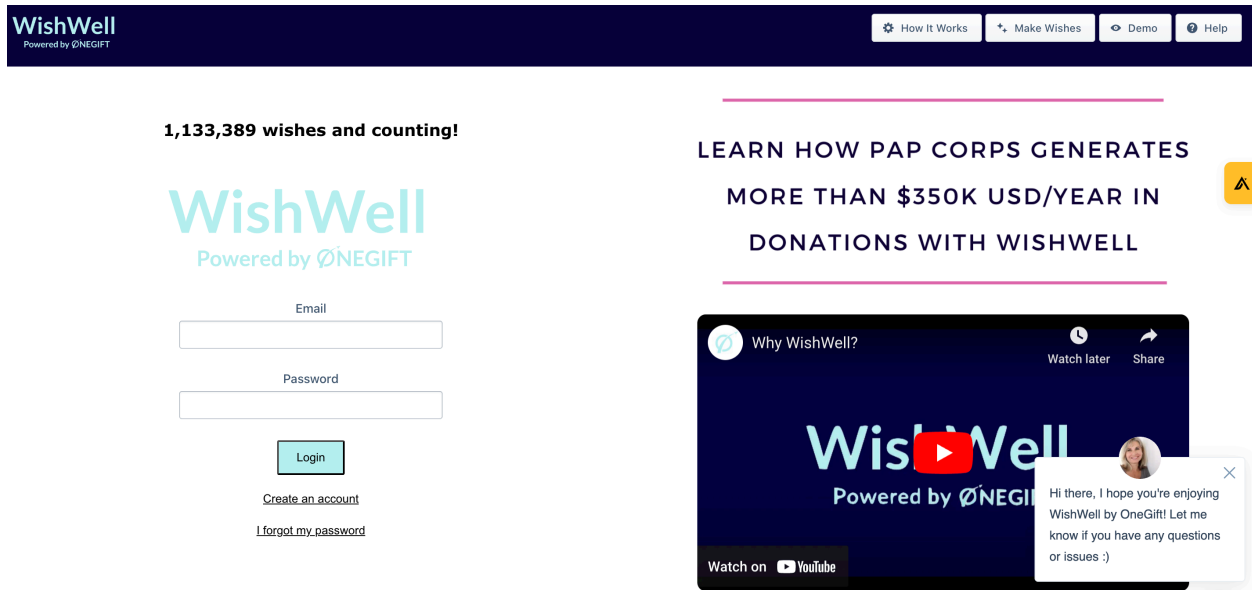
Configuring Your Account

All WishWell configurations are in the Settings page. When you first login to WishWell, you will be taken to the Settings page. You can also access the Settings page by pressing the Settings button or simply by refreshing the page.

We will now describe what each field in the settings page does:

Organization Name

This sets the name that your donors will see on order forms, online checkout pages, envelopes and emails. Choose a descriptive name that your members will recognize.

Email

This is the email that WishWell sends all messages to your members from and is only relevant if you are using our email feature. Note that this is also where member replies to WishWell emails will go, so please make sure that it's a monitored inbox.

After saving a new email, you must press the Verify Email button (if it is blue and clickable) before WishWell can send emails properly. Pressing the Verify button will send an email to the newly saved email with a link that you will have to click to verify that you in fact own the email account and are authorized to send emails from it.

Country

This cannot be changed.

Address:

Line 1 is Street (i.e. 12 Edward Street) and Line 2 is City, State and postcode (i.e. Boynton Beach, FL 33437)

Custom URL

This is the end of the URL where your members can place online orders. For example, if you put "ponte-vecchio", then your members' WishWell URL will be https://wishwell.ai/ponte-vecchio. Note that it is not case sensitive. The small Arrow button to the right of this field will open your donor page in a new tab, and the clipboard button to the right of that will copy the URL to your clipboard, so you can paste it wherever you'd like.

Brand Color

This sets the color at the top menu bar of WishWell. PAP purple is R: 153, G: 147, B: 200.

Upload Logo

Press this blue button and select the logo you'd like to use to change the logo on the top left of the menu bar.

Minimum Donation/Wish

This is the minimum donation that members must make for every person they wish well. It can be set to any number you like, and donors must donate at least that amount per wish, but can donate more. For instance, if you set it to 2 and Fred makes 10 wishes in Q1, he must donate $20 or more when checking out.

Default Wishers

This is a list of names and even organizations that you can add to any person's card that has at least 1 wish, but fewer than 5. It is a way of padding the card for newer members that got less wishes. You can enter in as many names as you like. they can be board members, staff, volunteers, whomever you'd like! Just type in the name and press "Enter / Return" to add. Click the 'x' next to a name to delete it.

Events

We currently only support birthdays and anniversaries and you can't change that in your Settings page. Contact WishWell to change these.

Donor Management

The import donors feature is not designed for PAP chapters, so we suggest you add new members manually rather than trying to import using this feature.

Important Note: Make sure to save your changes. You can refresh the page to check and make sure that the change was saved.

Adding, Editing, and Removing Users

You can have unlimited users in WishWell to help support the program. Each user will use their email to login.

To make changes to users, go to the Settings page and press the "Users" button at the top, just below the menu ribbon.

Users

⊕ Add User

username	permissions
pschnei160@aol.com	Admin
ontevecchio@onegift.ai	Super Admin
dysterling04@gmail.com	Admin
ryan@onegift.ai	Super Admin
mo_p1007@yahoo.com	Admin

lick here for more information on user permissions: Permissions Info

To add a user, press the Add User button, enter in their email, select "Admin" for permissions, and press "Save User". They will get an email with a link to set their password and login for the first time:

Create User

Email   ryan@onegift.ai

Permissions   Admin ✕   ✕ | ⌄

Delete User

To Delete a user, just click a user from the user list, and press the red "Delete User" button.

Note: if you need to change a user's email, you will have to delete them and re-add them with the new email.

Adding, Editing, and Removing Members

Add a member

To add a member, simply click the + Member button on the menu bar, enter in the required details, and press save. WishWell will tell you if you're missing anything.

Edit a member

To edit a member, simply type their name in the search box in the menu bar and press the "Details" button just to the right of it to open their record. You can search by name and ID number. Simply make the changes you want, press "Save Member", and you're all set!

Delete a member

WishWell doesn't allow you to fully delete a member record, but to 'turn them off' in WishWell, simply type their name in the search box in the menu bar and press the "Details" button just to the right of it to open their record. Uncheck the "Active" checkbox and press the "Save Member" button, and you're all set. Note that you can re-activate a member at any time by simply re-checking the "Active" box.

Member self-service

Members can update their own information, including contact preferences by either clicking the "Update contact preferences" link in any WishWell email, or by requesting an update link by pressing the "Update My Info" button on the WishWell page menu bar:
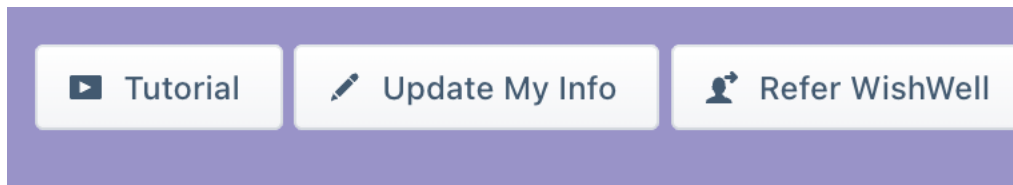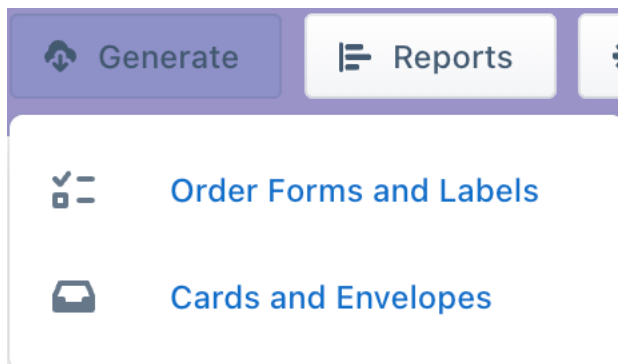

How to Generate and Send Order Forms

Generating order forms and labels (or emailing them) is simple!

Simply press the Generate button at the top menu bar:
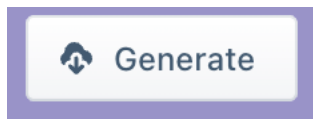
Select Order Forms and Labels:

Select the Quarter (Q1, Q2, etc)

Select whether you want:

- Individual Coversheets – this is when you get the order form and a series of pages of foldable envelopes with each donor's address that you can print on the backside of the order form, tape shut, and bulk mail.
- Label stickers and coversheets – this is when you get the order form and a three column sheet of mailing labels that you can print on label sticker paper to put on envelopes.

Note: label stickers and coversheets will only be generated for members with Mail Order Forms enabled.

Optionally, you can check the E-mail order forms box that will email a link to the wishes page, so that your members that have opted in to receive emailed order forms can easily make wishes online. We recommend only sending 1-3 of these per quarter to avoid annoying your members. **Only members with Email Order Forms enabled will get an email.**

Also note, that WishWell can send these emails automatically for you in the month leading up to each quarter. Checkout the WishWell automation section for more information.

All order forms, labels, and coversheets are printed as a Microsoft Word file, so you can edit it however you'd like before printing and sending.
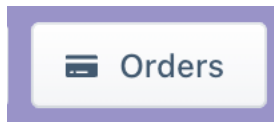
Accepting Orders / Wishes

There are two ways to place orders or make wishes on WishWell. You can fill out a physical order form and send a check, or you can go online, make your wishes and donate via credit/debit card or bank transfer.

Physical + Check

Must be done by a WishWell admin, the donor can't do this themselves

Press the Orders button in the menu bar:

Select the event type, quarter, and year

Type in the Donor PAP Number

Press Show Order Form

| Birthdays ▼ | Q1 ▼ | 2025 ▼ |

Donor PAP Number

16550 ⇕

🔍 Show Order Form

Select the wishes as indicated on the order form

Press "Make Wishes" at the bottom of the page

Enter the check details in the popup

Please input payment information for 2 wishes   ✕

Important: Check information is not required, but if entered, please make sure all information accurate before placing orders to avoid issues with billing or the deposit report. If no amount is entered, default is $1/wish and can be changed in your Settings page. This action will overwrite any previous orders from this donor for this year.

Payment Type

Check ▾

Check Number

[   ]

Check Date

mm/dd/yyyy 📅

Check Amount

[   ]

Cancel   **Make Wishes**

Press the blue "Make Wishes" button.

Important: To edit wishes, just repeat the above steps and the old wishes will be overwritten.

Online Orders

Go to your custom WishWell URL (i.e. https://wishwell.ai/ponte-vecchio)

Select the quarter and year

Find your name in the Donor Name box. Note you can search by name or ID number.

Press Select Wishes:

Select the people you want to wish well and press the "Make Wishes" button at the bottom of the page.

Enter you donation amount, indicate whether you want to cover the processing fees, and enter your email; press the blue "Make Wishes" button. Note: WishWell will send two emails after you checkout. A payment receipt and a wishes receipt that includes the amount donated and a list of everyone you wished well with their birthdays.
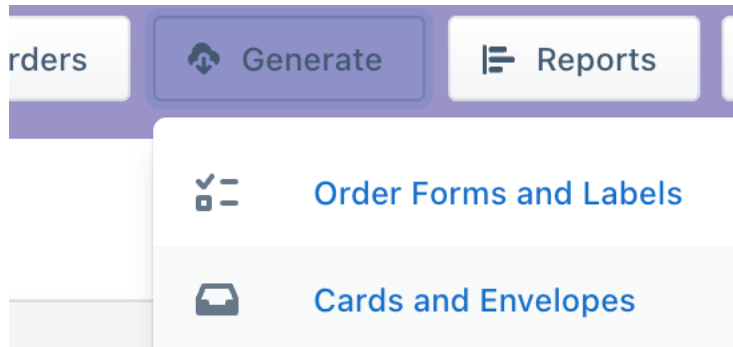
Enter your payment information and complete the transaction. You will get a green confirmation prompt at the top of the page when everything goes through.

Generating and /or Sending Cards

Cards can be either generated, printed, and mailed, or e-mailed as a pdf attachment.

Mailing Cards

First press "Generate", then "Cards and Envelopes":

Select the month and year you want the cards for

Select whether you want:

One file with all cards – a single word file will be generated with each card being a different page.

One file per card – a zip file with a separate word file for each card will be generated.

Note: only people with Mail Cards enabled will have a card generated.

Optionally, you can check the "E-mail Cards" box to have WishWell email cards to all people with a birthday card for that month (they go out immediately, so this should be done on or around the 1st of the month to avoid confusion. **Note that only people with Email Cards enabled will get these emails.** Also, note that WishWell has an automation feature that can send birthday cards on individuals' birthdays. See the section below for more details.

Reports

WishWell offers several reports at the "Reports" page:

Quick Stats

Active Members: 374

Donations (year to date): $

Donations (lifetime): $

[Export Member List](#)

Export Members

You can export a full list of all your members with all of their information and WishWell settings by pressing the blue "Export Member List" link on the reports page. This will generate a .csv file that you can save to your computer

Deposit Reports

You can generate a .csv file of all payments/deposits (both checks and electronic payments), by selecting the month and year (note that the program uses check and charge dates to filter records), clicking "Generate Deposit Report", and clicking the blue link that appears below the button after a few seconds to download the report.

Orders Reports

You can generate a .csv file of all individual wishes (it shows each wish sent), by selecting the month and year (note that the program uses the date the wish was saved to filter records), clicking "Generate Order Report", and clicking the blue link that appears below the button after a few seconds to download the report.

WishWell automation

WishWell can be fully or partially automated to send wish reminders and cards automatically by email.

WishWell will send 3 simple emails the month before each quarter to all members who have Email Order Forms enabled on the 1st, 15th, and 25th of the month (September for Q4, December for Q1, March for Q2, and June for Q3):

Here's your Sunday Breakfast Mission WishWell Order Form for July, August, and September birthdays!

ryan@onegift.ai
to margie ▾   Sat, Jun 1, 10:00 AM

Untracked   Log email to HubSpot ▾

Margie,

It's time to place your wishes for Q3 birthdays occuring in July, August, and September. Please head over to wishwell.ai/sundaybreakfastmission to place your orders via secure credit card or ACH payment today!

If you're new to WishWell, you can get more information on how the process works at: wishwell.ai/wishestutorial

Wishes are due by the end of the month. Please contact your organization administrator or WishWell if you have any questions or don't want to get these reminders anymore.

Happy Giving!

Your Sunday Breakfast Mission Team!

Donors can then place their wishes on their own time, but ideally before the end of the month.

WishWell then sends birthday cards to everyone that received at least one wish on everyone's birthday. Note that these only go to people with Email Cards enabled.

We do recommend marketing WishWell throughout the year to maximize engagement, but this option technically doesn't require any intervention by the organization. It all runs automatically in the background! Contact OneGift for more information ☺

Birthday Booster

The Birthday Booster feature emails a custom link to your members a month before their birthday that they can share with friends and family to fundraise on your behalf. The link will take them to a WishWell page to make a single donation and birthday wish to that specific member, and is a great way to expand your reach. Donations typically range from $5 - $50. The donor's name will be added to the members' WishWell card.

You can enable the Birthday Booster feature for your community in the settings page at the bottom of the page:

And each member can opt in or out of getting the link in the contact preferences.

Contact OneGift if you would like more information.