CSRconnect: Client Admin Panel

How to Turn Your File into a Link

Better Together.

Admin's have the ability to upload CSRconnect related documents that need to be turned into clickable links. These links can be used to embed documents, images, templates, and more throughout your CSRconnect communications, Engagement Elements, and custom text options. Before we get started, here are some common examples:

- Upload a copy of your UserGuide/FAQ and save the link in your browser in order to easily share with users you might support via email.
- Upload your Program Guidelines and retrieve a link that can be used in your program-focused Engagement Element.
- Turn your preferred Volunteer Sign-up template into a downloadable Excel sheet that can be posted in your custom text, Volunteer Toolkit, and more.

Accepted file types are: PDF, JPG, JPEG, PNG, EXCEL, PWPT, DOC

From the Community home, select **'CSRconnect Admin.'** This will take you the next generation Client Admin Panel:



Next, you will need to visit the Legacy Client Admin Panel. To do so, click on the 'Legacy Site Admin' link.

E Vourcer Prese New CR August	Welcome, Jewell Willett This is the start of your new admin panel. See below for information on current and future fun	ctionality.	Legacy Site Admin Return to Community
П Ноте 	CSRconnect Announcements Featuring important information and details for our Client Administrators.	HR ACTIVITY	

From the Legacy Admin Panel, click on 'General.' Then click on 'Design.'



After the Design dashboard loads, click on the **'Files'** link.

YourCause	General	Reports	Grants and Matching	Campaign	Settings	
Design					Go to CSRconnect Admin Panel Exit Admin Panel	
Banner Files Other Page	Promote	Message	Tab Rename Custom	Colors		
Which Graphic would you like to upd Please Choose	ate?					

Give your document some details and upload. **Enter a name** for your document - this will make it easier to locate in the future. A description is optional. After your file has been selected, click the **'Upload'** button.

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During the upload, the page will seem still. Don't click any other links until you see the 'Saved Successfully' banner generated.

Banner	Files	Other Page Promote Message Tab Rename Custom Colors
Saved	Successfully	
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Skills &	Cause Areas	Info
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	URL	https://s3.amazonaws.com/branding.yourcause.com/yc/1729256.119897.0.pdf

Now your link is ready. Locate your link by the name and copy/paste into your document, EE, custom text, etc.