



# TIDYHQ GUIDE.

A platform for those changing their world. 🚀



**WHO.  
WHAT.  
HOW.**

# Who

**We are a team originally from Perth, Australia**

**We now have members in Perth, Melbourne, Sydney and Ukraine**

**We started in 2009 as a hobby project to better run our founders community football club**

**In 2012 we launched to the public**



NEW MEETING  
17 July



TidyHQ

# Customers

**More than 3000 organisations in over 80 countries have signed up**

**Sports clubs make up 49%**

**Other community groups make up 49%**

**Small business make up the remaining 2%**

# Why?

**We believe that through stronger community groups we are building a better community for everyone**

**We are focused on reducing your administration time while increasing your ability to generate revenue.**

**Our most valuable asset is your trust**

**Our core values can be [found here](#)**

# How?

**We started building this platform so regardless of skill level a volunteer could add value to their organisation**

**For this to happen it had to be simple. It had to all be in one place and ready for the next generation to take over**

**We took cues from various leaders and influencers but ultimately we are building TidyHQ to run our own organisations**

# How?

**TidyHQ is both an App and a Platform**

**We want to provide you with a fantastic tool, but we aren't precious if you would like to use something else that is out there. We want to plug in to the best tools so you can do the best job you can. If we're your silent partner that is rarely seen we are still happy**

**For example, we send great Newsletters but if you want the additional power that Mailchimp can provide we allow you to sync Contacts with them.**



# How?

**“A tribe is a group of people connected to one another, connected to leaders, and connected to an idea. For millions of years, human beings have been part of one tribe or another. A group needs only two things to be a tribe: a shared interest and a way to communicate.”**

**– Seth Godin**



**CONTACTS.**

# First Principles

- Everyone is a Contact
- Even if you see them as a 'Member' they always start life as a Contact.
- You can invite them as a User (Administrator) but we will create them as a Contact as part of the process.

# First Principles

- **Contacts shouldn't be deleted because they are part of your history. Good governance and record keeping would require you to always store their history.**
- **So while we allow you to trash a Contact, we do not recommend it.**

# Custom Fields

- **While we have a standard Contact Profile fields, you can also create as many additional Custom Fields as you like. They can include file uploads, multi-choice, text fields and more**
- **You can also generate smart group from Custom Fields**
- **You can restrict Custom Fields to be edited by the Contact or so only administrators can adjust them**

### Add Custom Field

Title Favorite Digging Instrument

Type Radio buttons

Choices  Spade

Shovel

Hoe

[+ Add New Choice](#)

Short Group

Allow users to change this field through their profile page

Cancel

Save



Contacts >

**GROUPS.**

# Groups

- **Are like tagging a bunch of Contacts. For example tagging everyone with 'Red' would be like a Group called 'Red'**
- **If you remove a Contact from a Group, they are not Deleted**
- **Groups can be powerful tool for communication or arranging teams and sub-committees**



# Groups


- Smart Groups are still in their infancy but built from Custom Fields and automatically generated from Events and Memberships
- Group Messaging can be dangerous... use wisely 🤔



Communication >  
**EMAILS.**

# Emails

**Emails are used to communicate with your Contacts or a Group of Contacts**

**You can use Email to send Newsletters or updates to Suppliers, Sponsors, Members or any Contact or Group. Use in combination with Contact Groups for maximum effect** 

**You can add attachments or links to files in Storage to your emails** 



Emirates Natural History Group (Abu Dhabi Chapter)

<http://abudhabi.enhg.org/>

## Example of a newsletter

In this example there was  
also a PDF with more  
details.

### September 2016 Edition of Focus

Dear Members,

Please find below the September 2016 Edition of the Abu Dhabi Natural History Group newsletter, Focus. This is the first newsletter of the season and we hope with this issue to inspire you to join us on one of our many field-trips, offered to you all year round.

Enjoy reading!

Kind regards from your editor & team,

Marieke van der Vlugt, Claudia Steuber and Laura Conner

[Unsubscribe](#) from the list

Powered By  
 TidyHQ



## Very special Cabaret Night with our own Kevin Weldon on Saturday November 5

The Society of New Concord presents Dinner and A Show!

Saturday, November 5th at The SNC Meeting House

Note corrected time: Dinner/drinks begin @ 6:30pm, followed by show.

Bring On The Men: A Cabaret Evening

**Craig Cunningham** and **Kevin Weldon**, also known as "The Backdoor Boys", are not quite like other Boy Bands. In their new show "Bring On The Men!" they





Communication >

# GROUP MESSAGING.

# Group Messaging

- **Group Messaging can be dangerous... use it wisely** 🤔
- **Group messaging is a handy tool for committees. It allows you to have one email address that bounces your email to everyone else in the group.**
- **So if you have a large group of contacts it can start to feel like spam with all of the responses - not pleasant!**




Schedule >

**EVENTS.**



# Events

Events allow us to do two things:

1. Create a social atmosphere within our organisation 
2. Raise revenue for our organisation. 

We are trying to help you with the critical third piece which is reduce all of the headaches involved with running that event, or working out how it happened last year!

# Events

- **A simple tool which allows you to control numbers by limiting tickets**
- **Apply different pricing levels for your tickets, for example for Members/Non Members**
- **Easy to see at a glance how many tickets have been sold**
- **Simple online payment system**



Schedule >

**MEETINGS.**


# Meetings

- **Secretaries can arrange the Agenda**
- **Attach Reports**
- **List the Contacts being invited**
- **Send out the invites**
- **If required send out the details of the meeting to the attendees**
- **All in time for everyone to mark their calendars**

# Meetings

- **Streamline the time needed to read reports etc**
- **Agenda and Minutes all in one place**
- **Can be held On line using Skype etc**

# Meetings

- **Attendees and apologies are automatically entered when replies are received**
- **Reports and all attachments can be read prior to the meeting**
- **Saving valuable time for your committee** 



Schedule >

**SESSIONS.**

In beta

# Sessions

- **Have only just launched Session in limited beta, which means it's still not perfect and not everyone has access to the feature**
- **Built for training sessions or classes or workshops where a regular occurrence where attendance needs to be known is required**
- **It's not quite as onerous as a meeting or event**





Dashboard

Association

Contacts

Communicate

Schedule

Financials

Memberships

Pages

Tasks

Storage

Upcoming Events 00:07

Admins

Organisation Settings

Admins

## New Session

New Session

11 Items

Messages

Sessions

Title Weekly Workshop

Description or Questions A workshop to show you how sessions work! 1

Location Melbourne Convention Centre, Melbourne

Start Date &amp; Time

End Date &amp; Time

Repeat

Send Reminder




Invite a Contact or Group

Su	Mo	Tu	We	Th	Fr	Sa
26	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	1	1	1	1




**FINANCES.**

# Finances

- Clear recording system that allows your treasurer see at a glance what has been achieved 
- Invoicing made easy 
- Online payments automatically recorded 

# Finances

- **Your President/Chairperson can easily track the financial records without always having to ask your Treasurer**
- **Records can be accessed quickly at meetings** 
- **Budgets produced at a click of the button**
- **Let's record a New Deposit... video on next screen**

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**Today's Balance: \$86.47**

Address

Organization Settings

Invoice

## New Deposit + New

[Overview](#) | [Transactions](#) | [Money Download](#) | [Drafts](#) | [Budget](#) | [Reports](#)

Pick a contact <input type="text" value="Mike O'Brien"/>	Reference <input type="text" value="This was for concrete"/>	Post date <input type="text" value="20 Oct 2016 10:00"/>
Payment Type: <input type="text" value="Cash"/>		Category: <input type="text" value="Concrete floor work"/>

Description	Amount	Category	Tax
Concrete floor was laid down	480	Flood Lights	1 Yes 2 

+ Add Line Item

+ Add Attachment

Sub Total	432.00
Tax	48.00
<b>TOTAL</b>	<b>480.00</b>





# Stripe

- **Connection to your existing bank account is easy using Stripe. Taking 4 minutes with the details you already know!**
- **Your customers won't need a Stripe account to make payments**
- **Your money is rolled into your bank account on a 5 day rolling basis**



**MEMBERSHIPS.**

# Memberships

- We all need members 
- They are the backbone of our Clubs and Organisations 



# Fixed Vs Rolling Memberships

You can create Fixed or Rolling Memberships

- **Fixed Period Memberships start at a fixed date and continue for a fixed period**
- **Rolling Memberships start on the date your Contact signs up for it and continues for the period you specify**

# Life Memberships

**You can use Memberships for both Internal memberships such as Life Memberships where you don't want the public to access them**

**Or you can set them up so anyone from the Public can find and purchase a Membership**

# Family Memberships

**Registering a Family is simple. Click the Family Membership option. You can then add different prices for the additional Adults or Children**


**You can have different fields in your Membership Forms for each of them**

**You can automatically drop them into Groups for future communications or for Teams**



**ROLES.**

# Roles

- Roles can be setup for the different positions in your organisation
- They are helpful to define what each person's role is.
- Tasks can then be assigned to these roles 
- Emails can be pointed to these roles via their role email address which then bounces to their personal email address

# Roles

- **As a result of a well setup list of Roles they form a great ready-made succession plan**
- **In its simplicity Roles can best describe themselves**

## Roles

Organization Details

Custom Fields

Date, Time, Currency

Finance Settings

Memberships

Payment Settings

Users and Roles

Executive Settings

Public Facing Page

Activity Feed

Users **All Roles**

ADD ROLE

You can assign Tasks to Roles as well as print this list out and hand it out at your Annual General Meeting where positions are usually filled. This will help set expectations. The Roles within an organization help to maintain the smooth process flow.

Role Name	Responsibilities	
<b>President</b> Mary Poppins president@demodemo12345.com	<b>Objectives</b> * To provide strong, efficient and effective leadership for the organization. * Ensure the organization is run efficiently administratively four times	✖
<b>Vice President</b> John Citizen vp@demodemo12345.com	<b>Objective</b> <ul style="list-style-type: none"><li>• Provide leadership to all members, volunteers, supporters, staff and other stakeholders.</li><li>• To provide support to the organization year round</li></ul>	✖
<b>Secretary</b> Jane Bloggs secretary@demodemo12345.com	<b>Objectives</b> <ul style="list-style-type: none"><li>• To ensure that appropriate administrative support is provided to the President, General Committee and sub-committee's.</li><li>• To provide a "four times"</li></ul>	✖
<b>Treasurer</b> Sarah@12345.com	<b>Objective</b> <ul style="list-style-type: none"><li>• To ensure that a financial management system and reporting system is put in place and operable so the Organization Committee has an error free flow</li></ul>	✖



Dashboard

Association

Contacts

Communicate

Schedule

Finance

Memberships

Pages

Tasks

Storage

Import Members

Admin

Organization Settings

Admin

Help and Support

Search Organization



**TASKS.**



# Tasks

- **Tasks are action items for your organisation**
- **They may be set up to repeat for example ‘Pick up sticks’ can repeat every Monday**
- **You can also assign a [Role](#) to a Task (instead of an individual) which is incredibly powerful for a succession plan. For example assign ‘Pick up sticks’ to the ‘Secretary’**
- **So it doesn’t matter who is in that role, that task reminder will be sent to them**



**STORAGE.**

# Storage

- **Storage is the place in the cloud for all of your groups documents**
- **You can have as many folders and sub-folders as you like**
- **You can link to these files so others can download them from your Pages or website or email**

# Storage

- **All items are automatically stored when you add an attachment to a meeting, email or task**
- **\*\*\*\*\* File size limits? \*\*\*\*\***
- **Sub-Folder permissions is something we are still working on**



# ADD-ONS.

Integrations

# Integrations

**We want you to be able to use the best tools you can and have them sync with your TidyHQ account**

# Mailchimp

- **Mailchimp is one of the most popular email campaign services in the world**
- **Allowing you to use various templates and analytics.**
- **TidyHQ can sync Contacts and Groups with Mailchimp**



# CareMonkey

- **CareMonkey automatically keeps medical and emergency details up to date**
- **This add-on will connect a Contact Profile with their CareMonkey Profile as well as keeping their emergency information in sync**





# Xero

Private Beta

- **Xero is one of the fastest growing accounting platforms in the world**
- **Our integration synchronises both ways with Xero all Transactions allowing you to work either in Xero or TidyHQ or both**



# Dropbox

Coming Soon

- **One of the most popular cloud storage platforms in the world**
- **Automatically backup and sync all of your TidyHQ Storage with Dropbox**



# Google Sheets

Coming Soon

- **Google Sheets takes Microsoft Excel to the cloud**
- **Sync Contacts or Finances to a Google Sheet**



# Others

Coming Soon

**We have a long list of other tools and services we want to integrate with.**

**Please let us know what you would like to see integrating with TidyHQ and help it push to the front of the line!**





# API.

Developer talk

# API

- The TidyHQ API allows you to include the power of TidyHQ directly into your own app or website
- You can find all of the details here:  
<https://dev.tidyhq.com/>

# API

- **Organisations have used it to build integrations into their websites**
- **Building security systems**
- **Membership card printing services and others**



**See you soon.**

TidyHQ.com