

CrowdChange How-To-Guide

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# How to Start Your Philanthropy Event

*Donations, tickets, and more*



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## ADVANCED ADMIN FEATURES

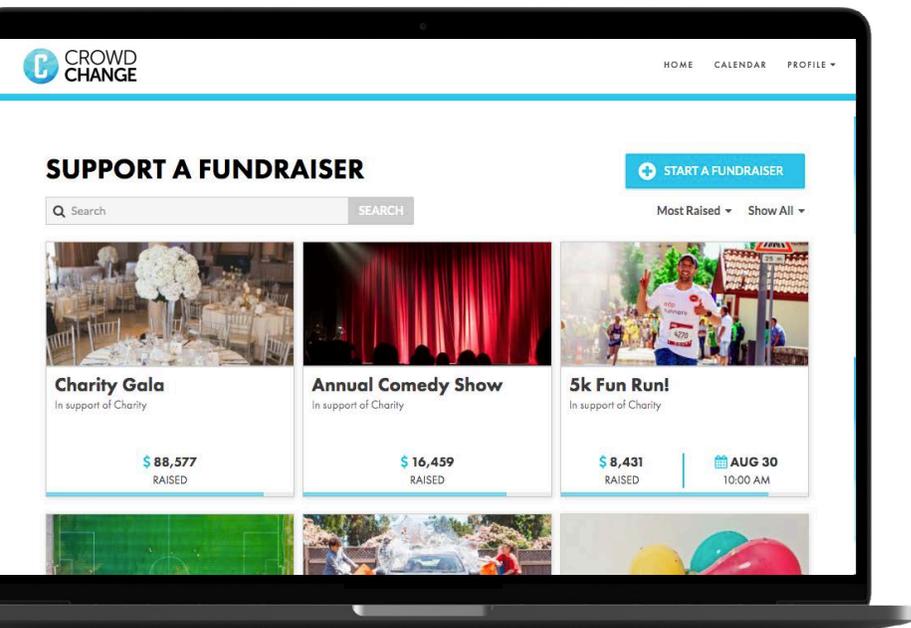
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# Welcome!

Welcome to the CrowdChange “how-to” guide! This guide will walk you through how to start your online fundraiser and customize it specifically for your event. Every feature you need – all in 10 minutes or less!



## Step 1: Get Started

Go to your CrowdChange site and click the “Start a Fundraiser” button!

## Step 2: Basic Fundraiser Info

Page one is where you fill in the basic information about your fundraiser. If you would like the amount raised to remain a secret, simply toggle off the fundraising goal. If your fundraiser does not have a time, date or location, leave these features toggled off.

 A screenshot of the "BASIC FUNDRAISER INFO" form. The form includes the following fields and options:
 

- My fundraiser name:** Text input field with placeholder "e.g. Friday Night Lights".
- In support of:** Text input field with "Autism Speaks Canada".
- Goal:** Text input field with "\$5,000". A toggle switch is set to "ON" (checked). Below the input are two buttons: "\$ RAISED" and "DONORS".
- My fundraiser has a date and time:** A toggle switch is set to "ON" (checked). Below it is a date and time picker showing "December 4, 2019 12:00 PM".
- My fundraiser has an end date and time:** A toggle switch is set to "ON" (checked). Below it is a date and time picker showing "December 4, 2019 1:00 PM".
- My fundraiser has a location:** A toggle switch is set to "ON" (checked). Below it is a text area containing "123 Main Street, New York, NY 10001".

 A "CONTINUE" button is located at the bottom right of the form.

## Donations are Tax Deductible

When this slider is enabled, an "Expense" field will appear. The expense is the dollar value of the benefit offered to donors (this amount is not tax deductible). For example, if you charge \$100 for a ticket to attend a dinner where the cost of the food is \$20, then your expense is \$20. When a donor buys a ticket, they will receive a tax receipt for \$80, which is the cost of the ticket minus the expense. The "Expense" field will appear under all features when donations are tax deductible.

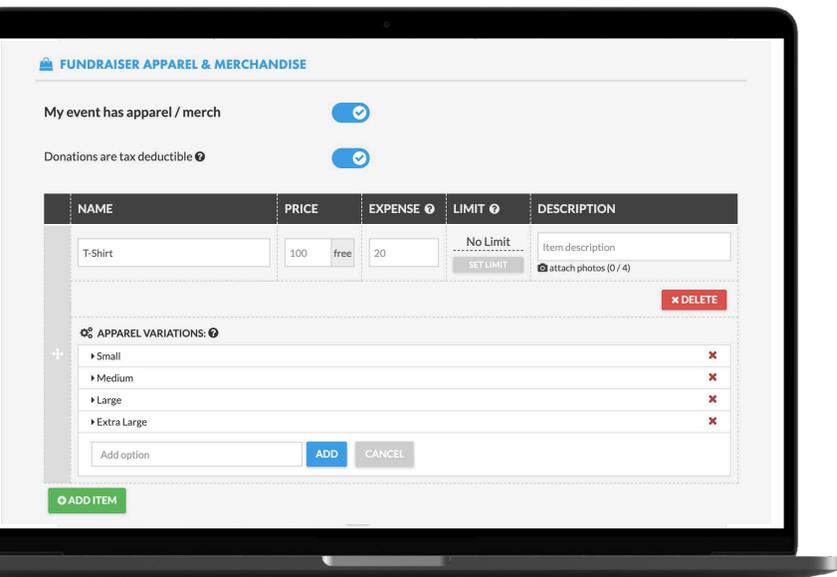
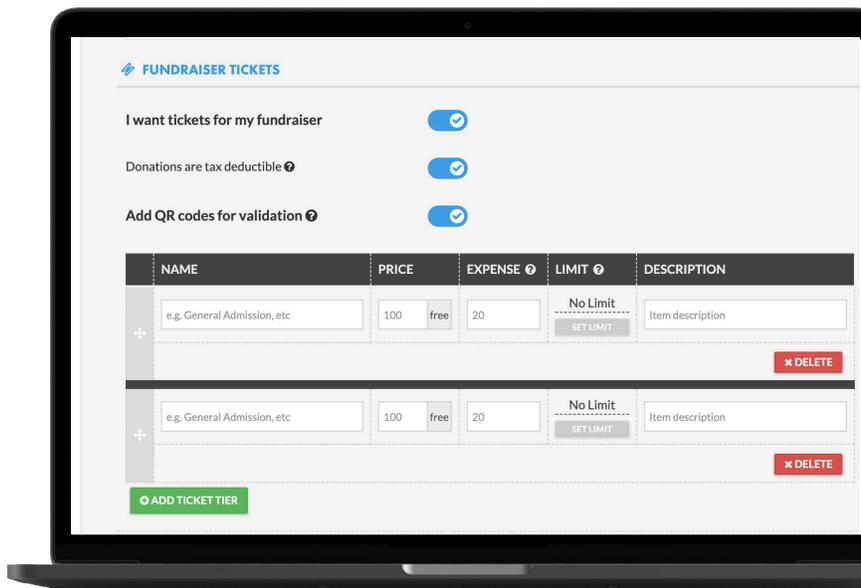
### Step 3: Customize

#### Tickets:

Turn on "This event has tickets" to enable tickets, then fill in your ticket tiers. Everyone who buys a ticket will receive an email with a PDF ticket attached. As an event organizer, you will be able to download a full guest list with one click.

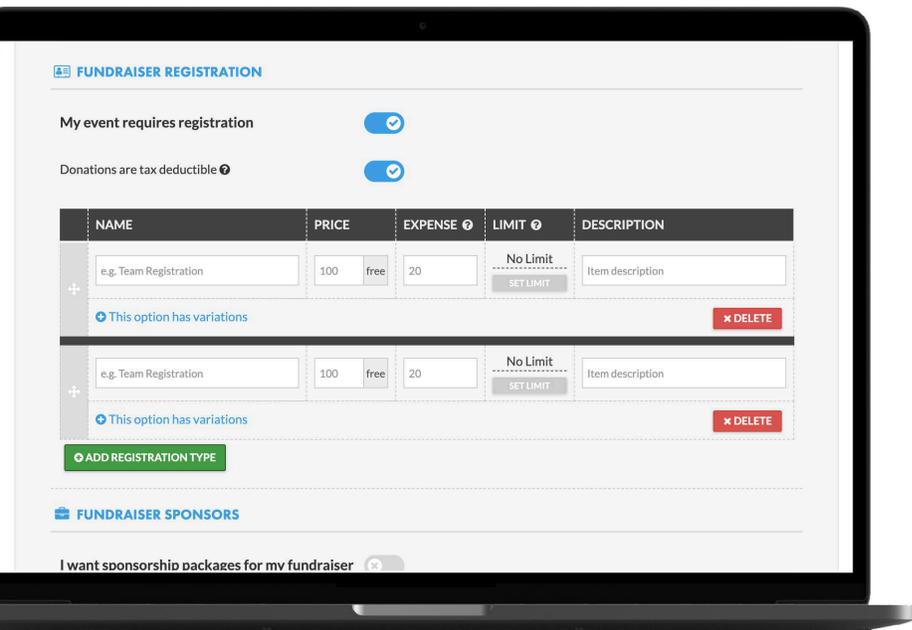
If you would like tax receipts issued for your fundraiser, turn on "Donations are tax deductible" and enter the expense for each ticket tier.

If you'd like to use the CrowdChange ticket scanner, toggle on "Add QR Codes for validation." For more info on the ticket scanner, [click here](#).



#### Fundraiser Apparel & Merchandise:

If you are looking to sell apparel or merchandise for your event, we've got you covered. Simply fill in the name of what you are selling, set the price and add any sizes or colours you would like to offer by clicking "add variations" located below the name field. For events with registration that includes a t-shirt, simply put the name as "Registration + t-shirt," and this feature will allow you to collect sizes from participants that register.

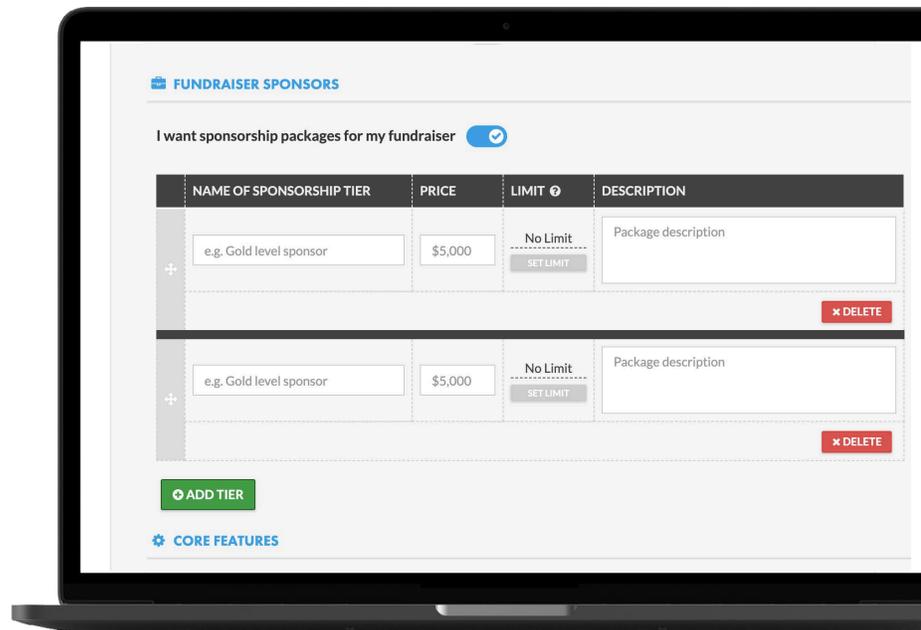


### Fundraiser Registration:

For events that require individual or team registration, we've made it easy. You can create as many registration tiers as you wish, and participants can register and pay directly online. All participant information can be downloaded with one click, right to Excel.

### Fundraiser Sponsors:

Event organizers can engage companies through our sponsorship feature. Create as many different sponsorship tiers as you wish to offer, and companies can go to your CrowdChange page and purchase a sponsorship package online by credit card. Common sponsorship tiers include offering the naming rights for the event, including company logos on apparel and incorporating company logos on event signage.

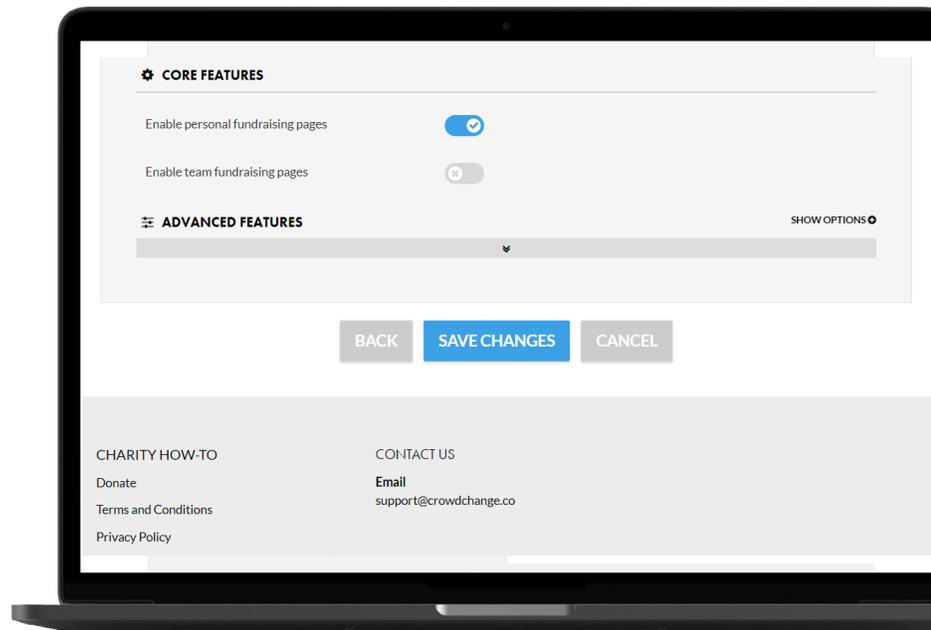


## Tips & Tricks

Many consider this to be the #1 tip when raising more money on CrowdChange pages: We encourage you to take five minutes in a meeting with everyone involved with the fundraiser, have them create a personal page, and send it to five people WHILE IN THE MEETING. People can share this personal page with family and friends as a way to receive additional donations.

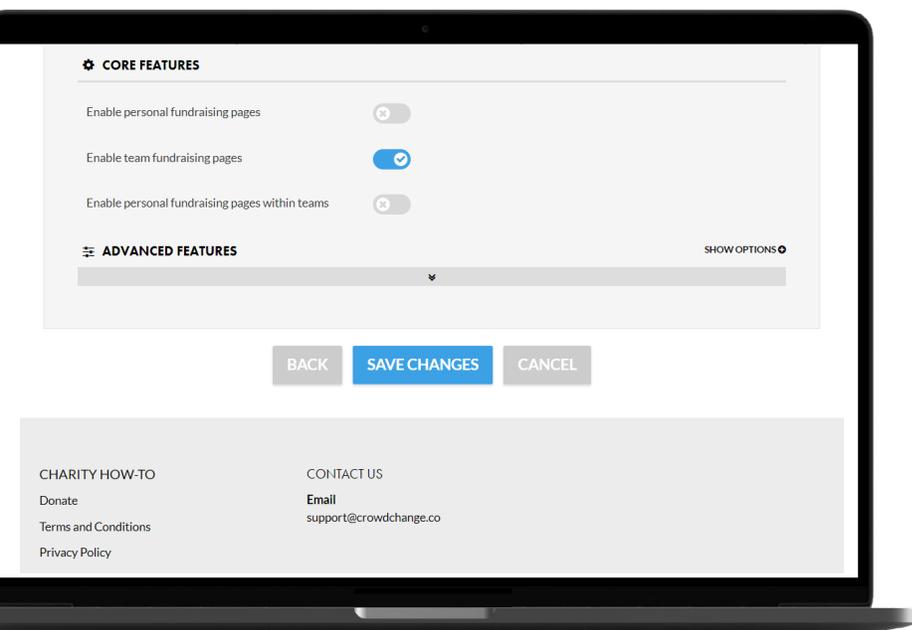
### Personal Fundraising Pages:

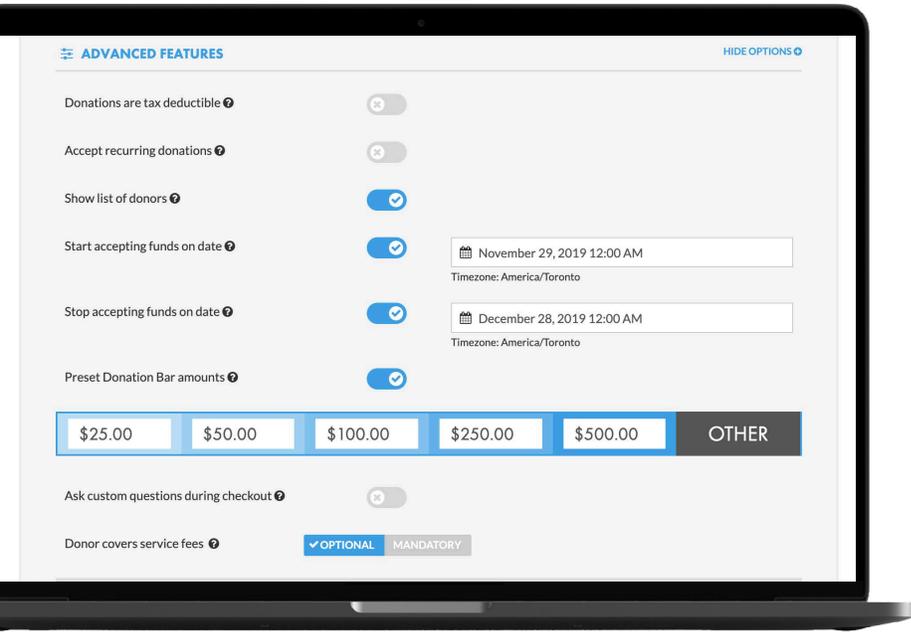
This is arguably the best feature for increasing funds raised. It allows everyone involved to create a personal fundraising page that is part of your broader fundraising page. Turn on the toggle button for “Enable personal fundraising pages” to enable this feature.



### Team Fundraising Pages:

This will enable you to create team fundraising pages as part of the broader fundraising page. These pages will appear in a leaderboard format on the fundraising page. Turn on the toggle “Enable create team fundraising pages” to enable this feature.



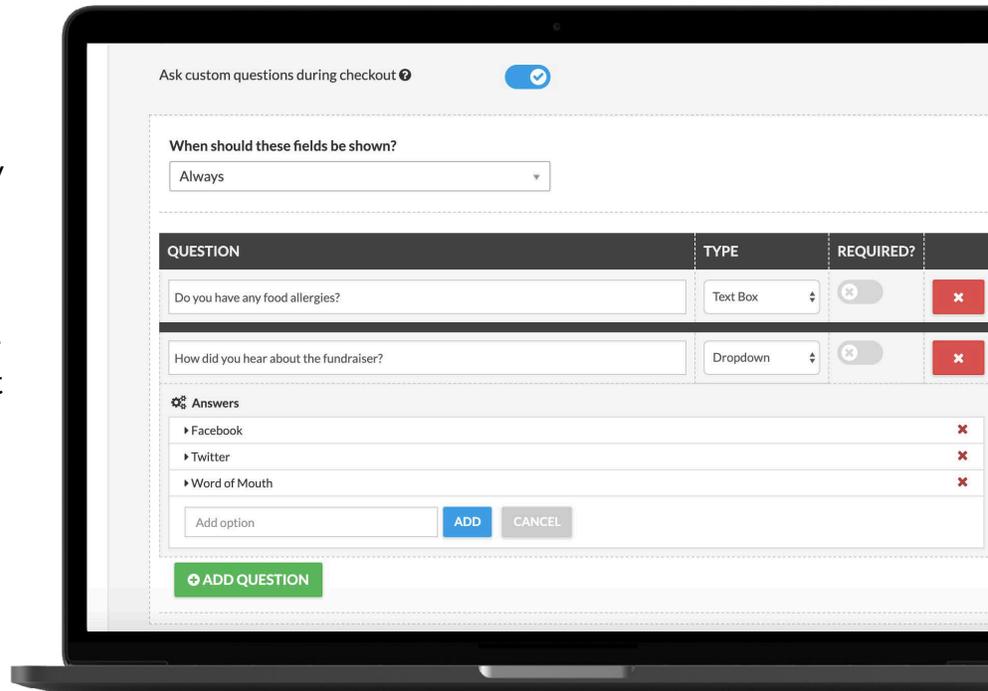


## Advanced Features

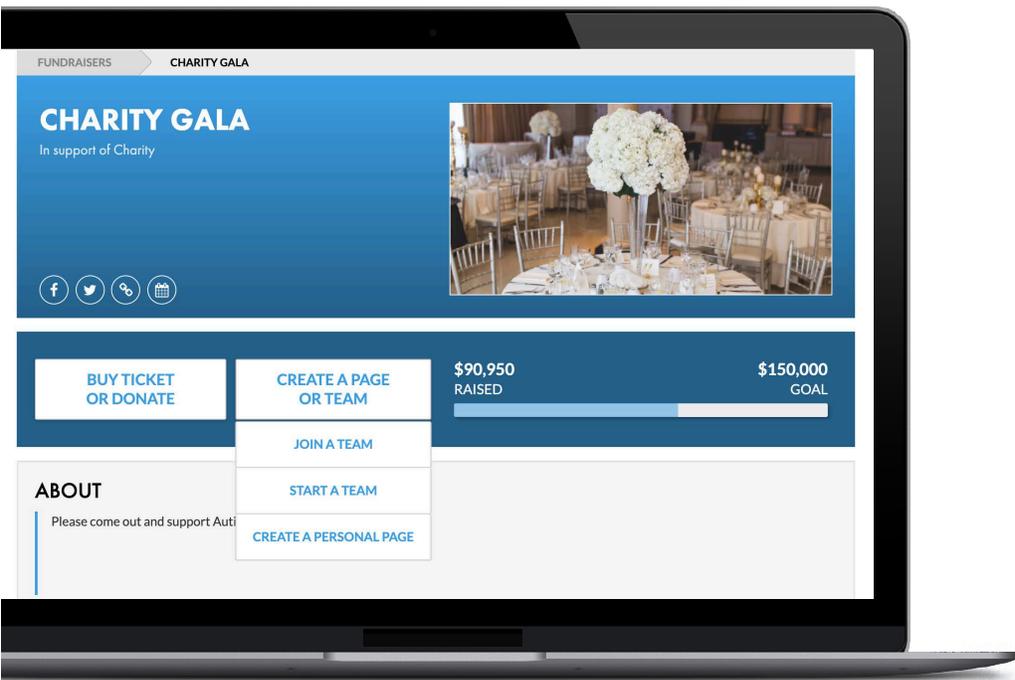
Here you will have access to a variety of advanced features such as toggling the donor list on or off, selecting specific dates to start and stop accepting funds, editing the suggested donation amounts and more.

## Custom Questions During Checkout

When "Ask Custom Questions during Checkout" is enabled, you have the ability to customize the checkout page for your fundraiser. To ask supporters questions, simply click "Add Question". Organizers can allow supporter responses to be free-form with our text box option or they must select a response from a pre-set menu with our checklist and drop down options. You can choose when you would like questions to appear by clicking "When should these fields be shown?" and all responses can be downloaded to Excel with one click.



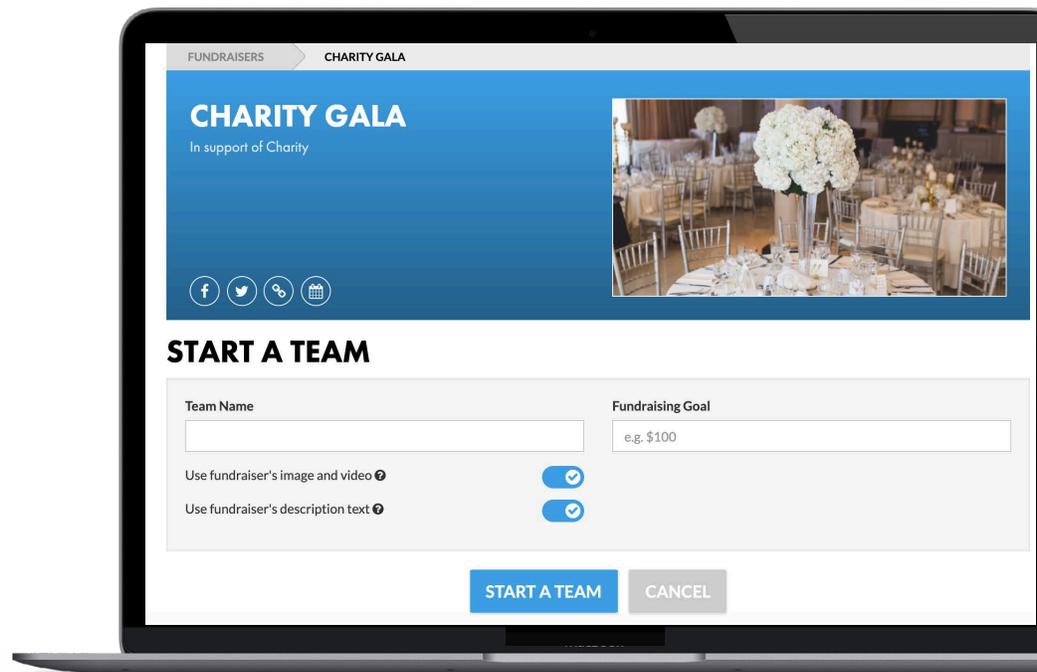
## Creating A Team Fundraising Page



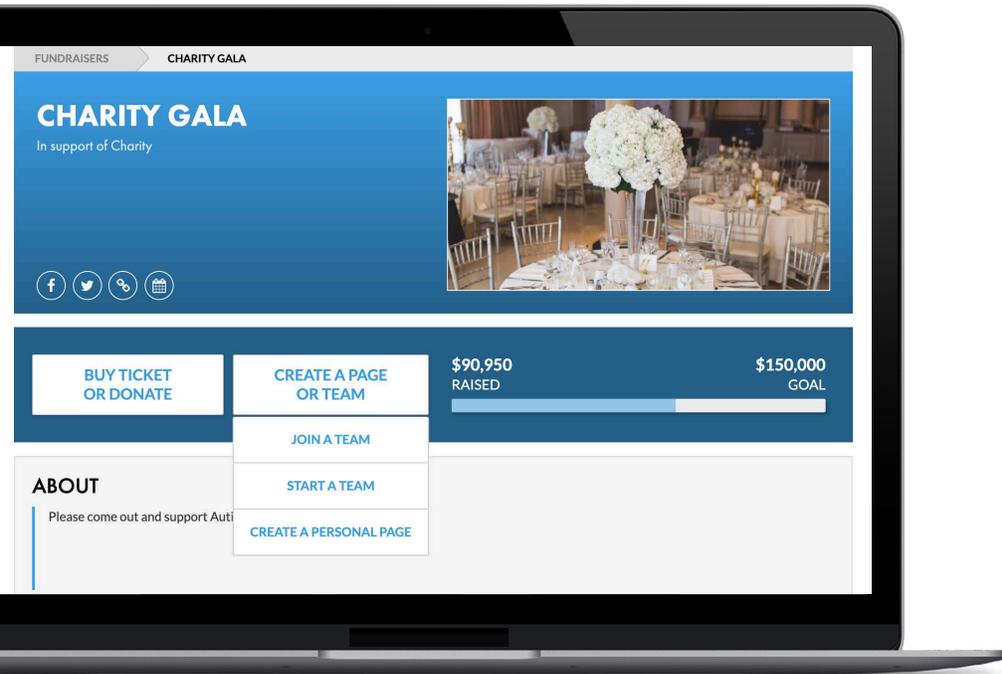
**Step 1:** From the fundraiser's main page, click "Create a Page or Team", then click "Start a Team".

**Step 2:** Enter a team name and your team's fundraising goal. Then select whether you would like to upload your own image, video and/or description text on your team page, then click "Start a Team".

If you have not already done so, you will be prompted to create an account. This can be done by entering your first and last name, email address and creating a password.

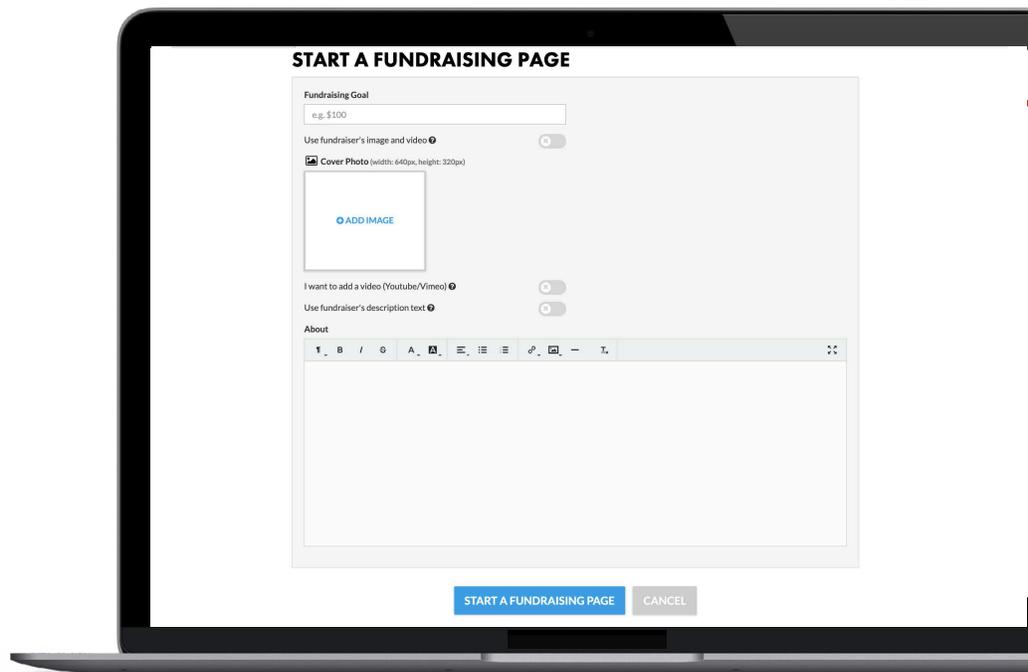


## Creating A Personal Fundraising Page

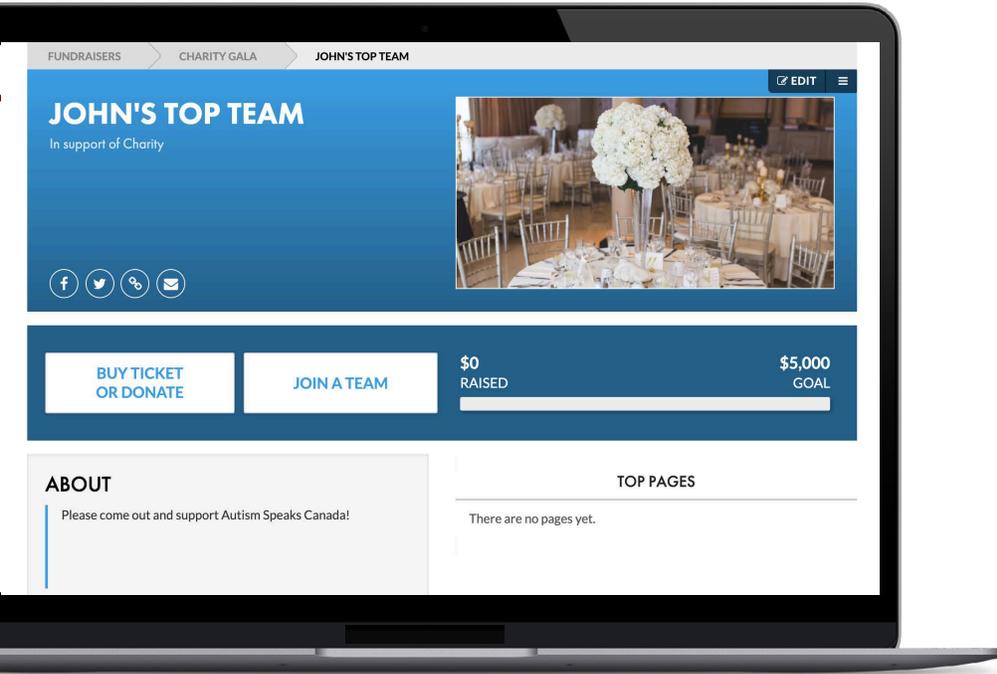


**Step 1:** From the fundraiser's main page, click 'Create a Page or Team', then click "Create a Personal Page." Personal pages can also be created as part of a team by clicking "Join a Team."

**Step 2:** Enter your fundraising goal, select whether you would like to upload your own image, video and description text on your personal page, then click "Start a Fundraising Page."

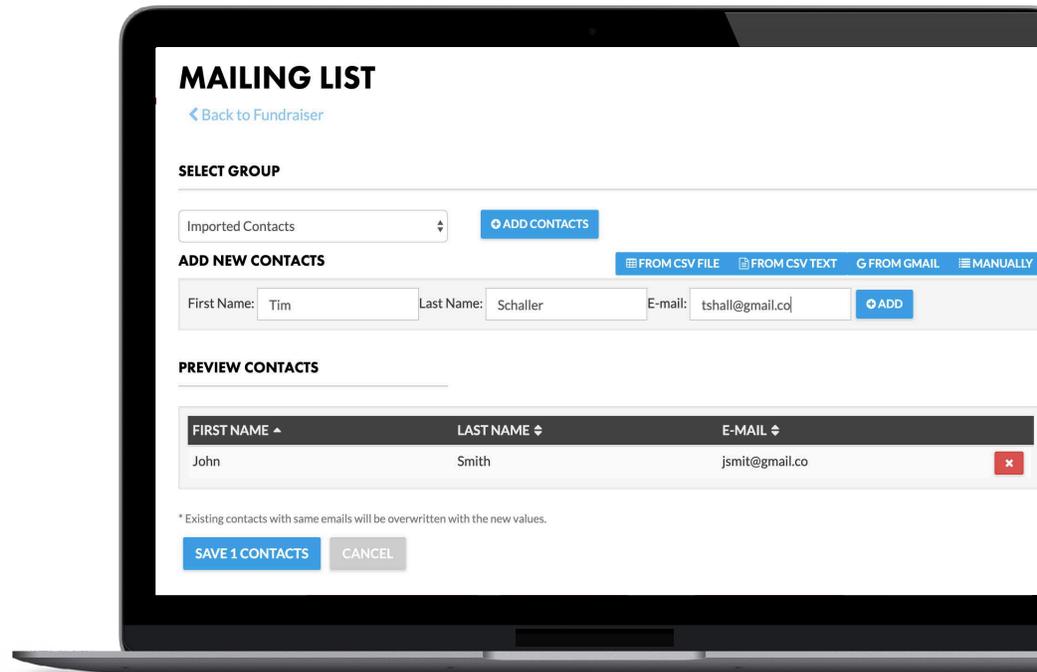


## Using the Mailing List to Share Your Page

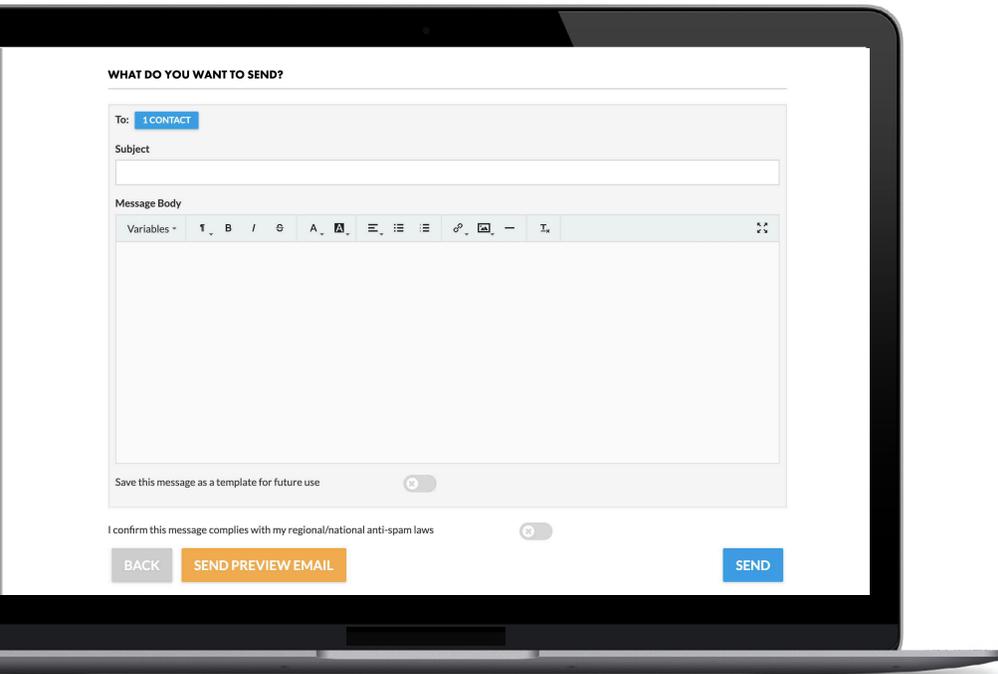


**Step 1:** Click the "Email" icon located next to the Facebook and Twitter share icons. Alternatively, this can be accessed by clicking the menu icon located above the fundraiser pictures (to the right of the "Edit" button).

**Step 2:** Click "Add Contacts" and select whether you would like to import contacts from a CSV file, Gmail or enter them manually. Once you have imported/entered your contacts, click "Save Contacts." Select the contacts you would like to email by clicking the checkbox next to their name and click "Continue" to draft your email.



## Using the Mailing List to Share Your Page

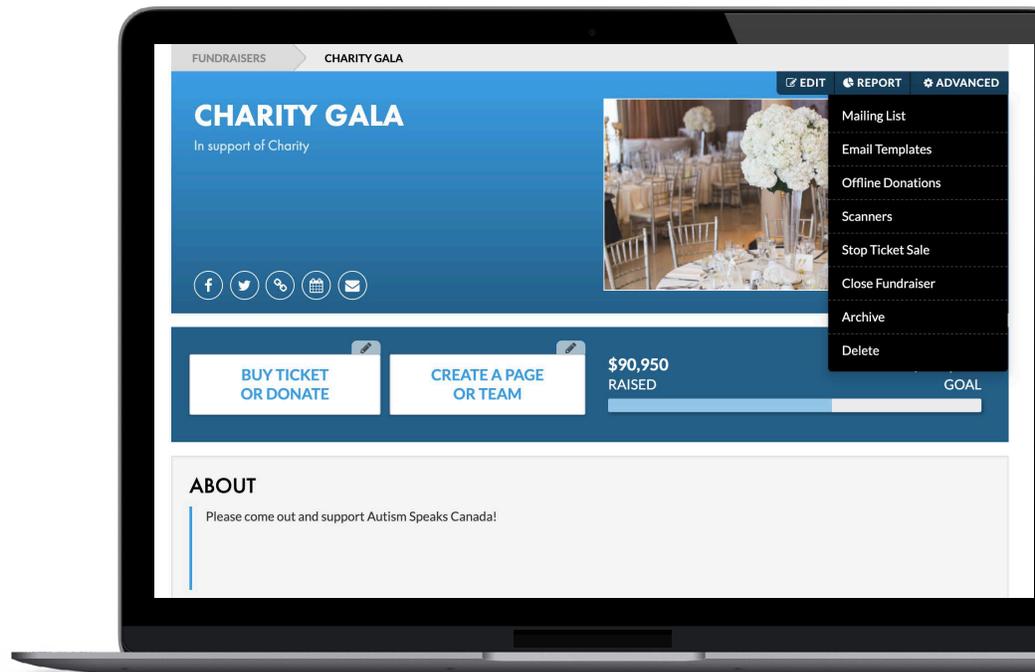


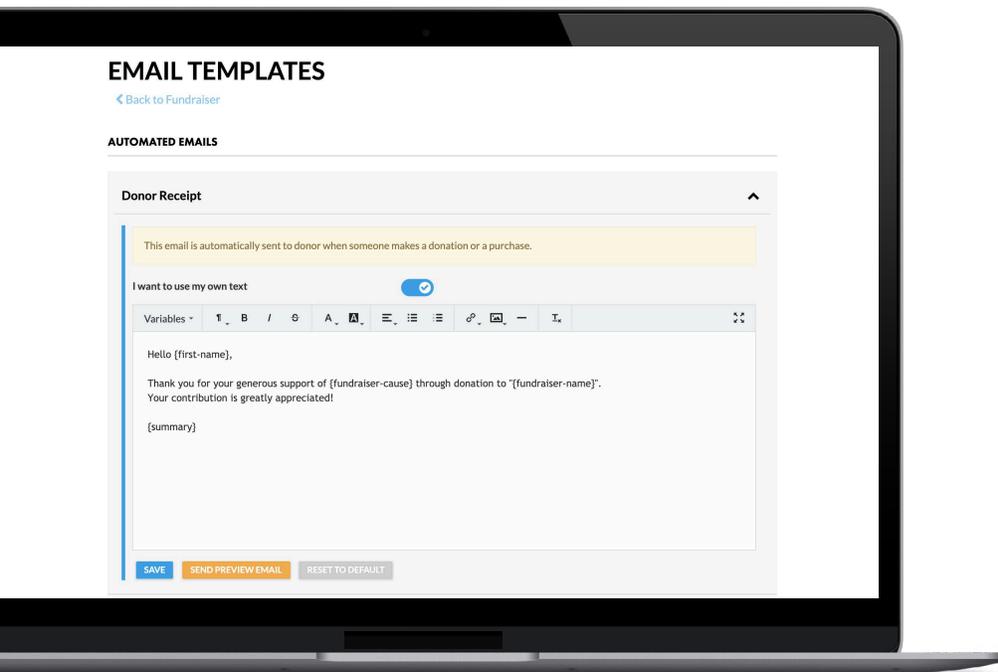
Step 3: Create a subject line for your email and enter text into the "Message Body" text field below. Click the "Variables" button to add auto-fill fields (e.g. First Name). To send the email, confirm the message complies with your regional/national anti-spam laws and click "Send.,"

### Advanced Admin Features

## Custom Automated Email Templates

You can view, edit, and manage automated emails sent to your supporters by clicking "Advanced," then selecting "Email Templates."

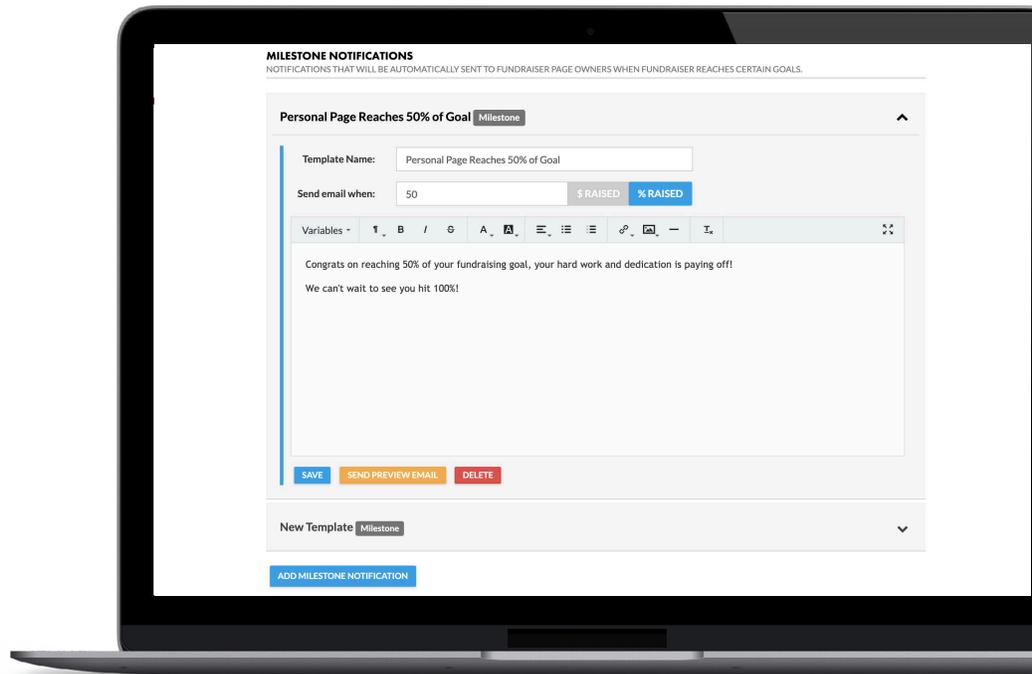




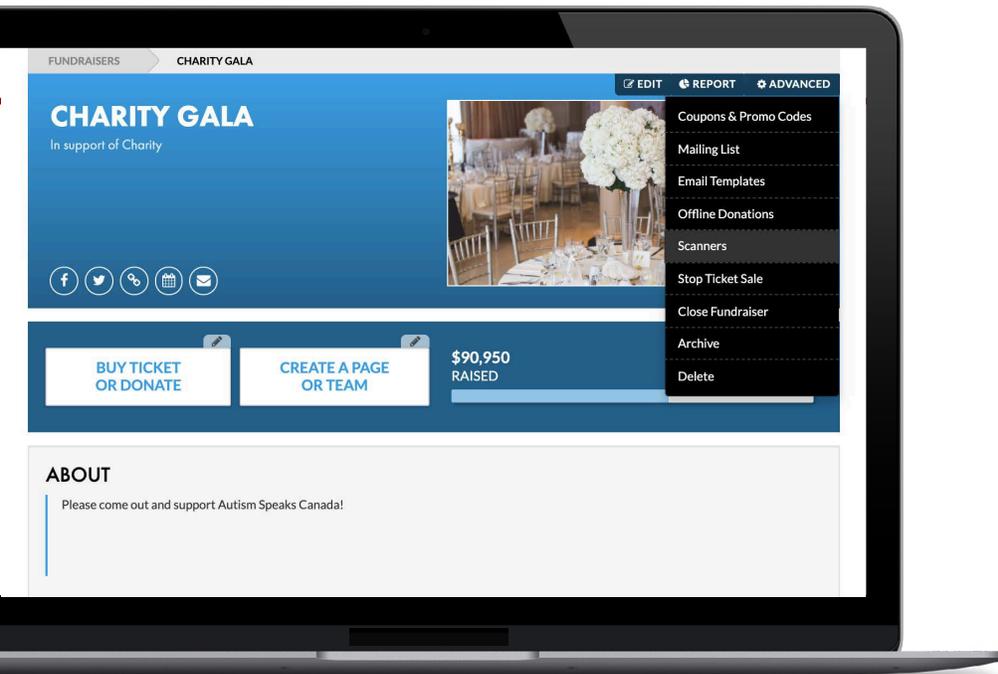
To view an existing automated email template, click the down arrow to the right of the template. If you would like to edit or change the text, click "I want to use my own text." Enter the new text for the template, then click "Save."

## Milestone Notifications

To create a "Milestone Notification," start by clicking "Add Milestone Notification" and entering a name for the template. Next, you will need to select whether this notification will be sent when a fundraising page reaches a specific dollar amount raised, or a certain percentage of its fundraising goal.

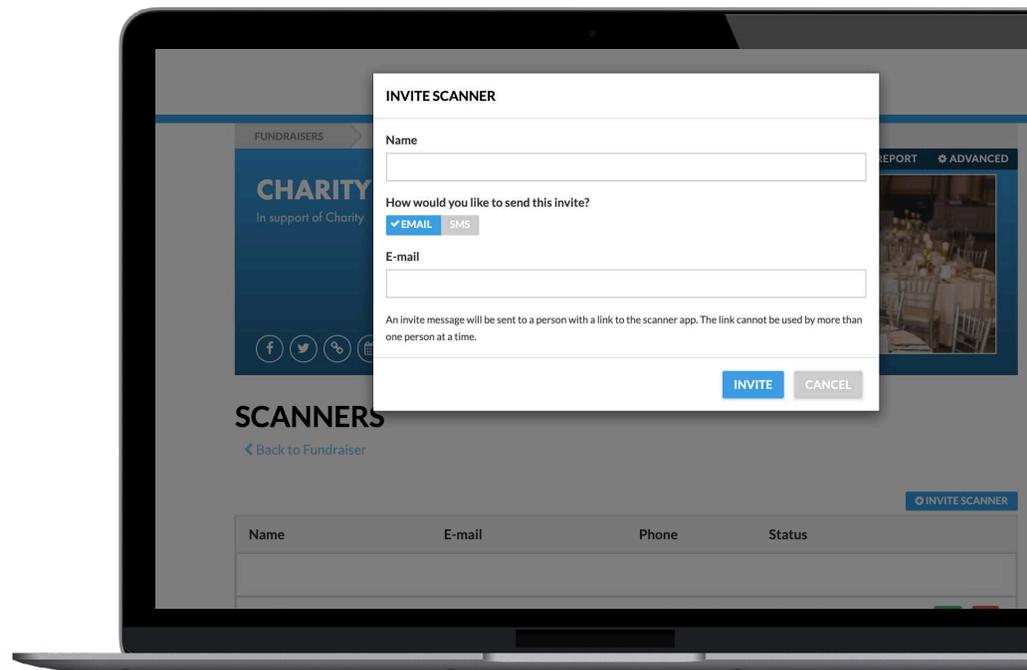


## Ticket Scanner



If "Add QR codes for validation" has been enabled, you will have the ability to access the ticket scanner for your fundraiser. To get started, click "Advanced," then click "Scanners" from the fundraiser's main page.

From the "Scanner" main page, click "Invite Scanner." Inviting ticket scanners can be done by SMS or email. As the host of the fundraiser, you will be able to revoke active scanners and re-send invitations for inactive scanners.



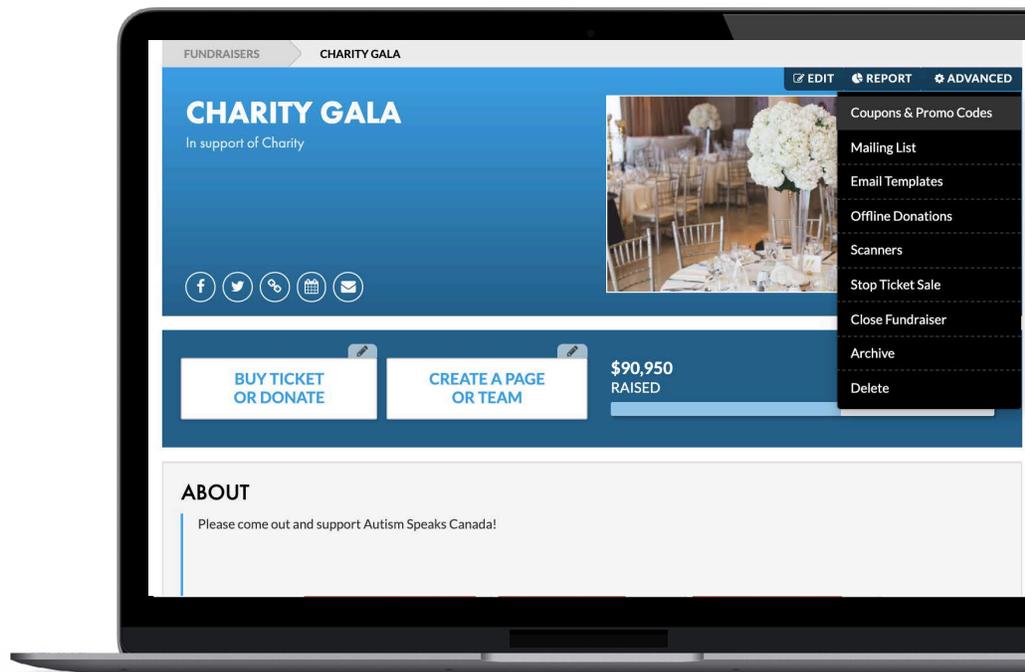
## Ticket Scanner



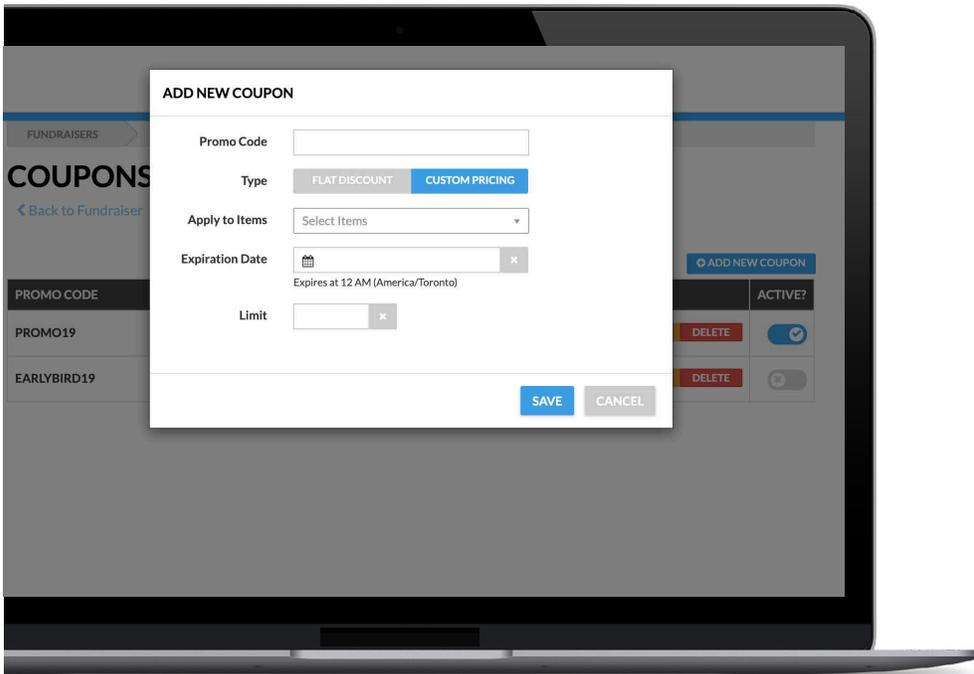
Scanner invitees will receive a message to scan tickets, which will include a URL that can be accessed through a web browser on any mobile device. Simply take a picture of the QR code on the ticket or use the search field (bottom left corner) to manually search for an attendee's name. There is no app or hardware required. Please note that the scanning device must be connected to the internet.

## Coupons and Promo Codes

From the fundraiser's main page, click "Advanced," then click "Coupons & Promo Codes."



## Coupon and Promo Codes

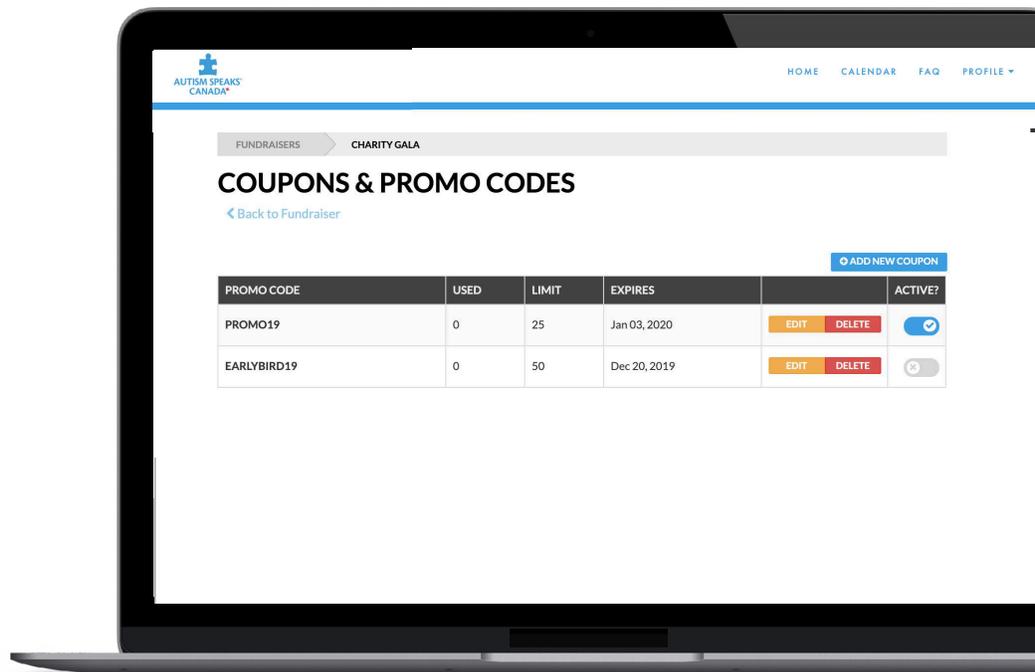


From the "Coupons & Promo Codes" main page, click "Add New Coupon," enter a name for the coupon code and select one of "Flat Discount" or "Custom Pricing" as your coupon type.

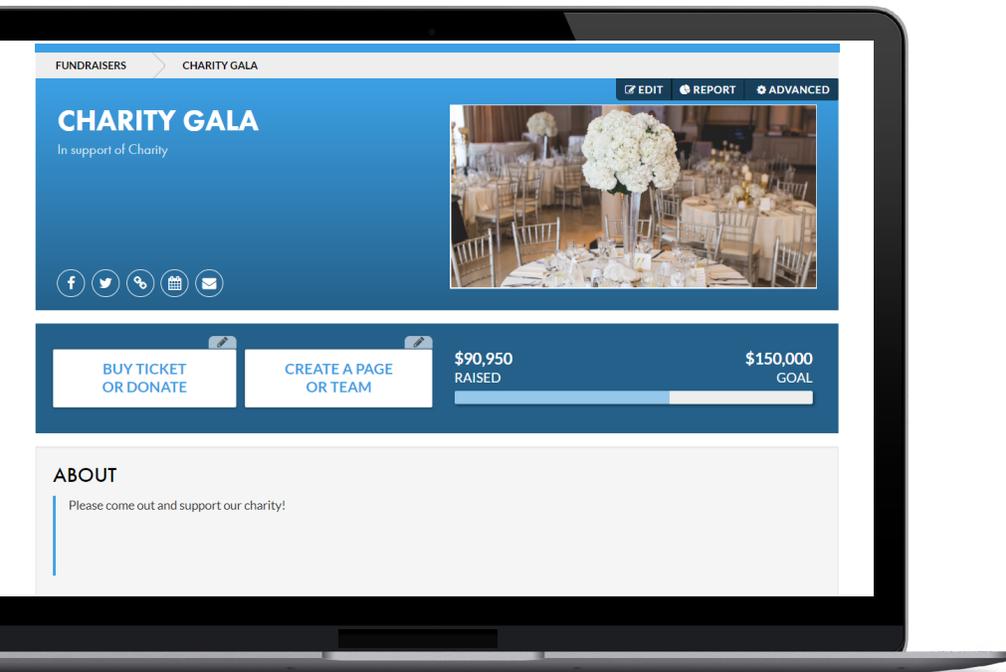
From the drop down menu, select what you would like the coupon code to apply to and enter the preferred price or discount amount/percentage. You can also add expiry dates and limits to the number of times a code can be used.

After creating a coupon code, you can view and manage all existing codes from the "Coupons & Promo Codes" main page.

Here you can edit or delete an existing code, as well as activate/de-active a code.



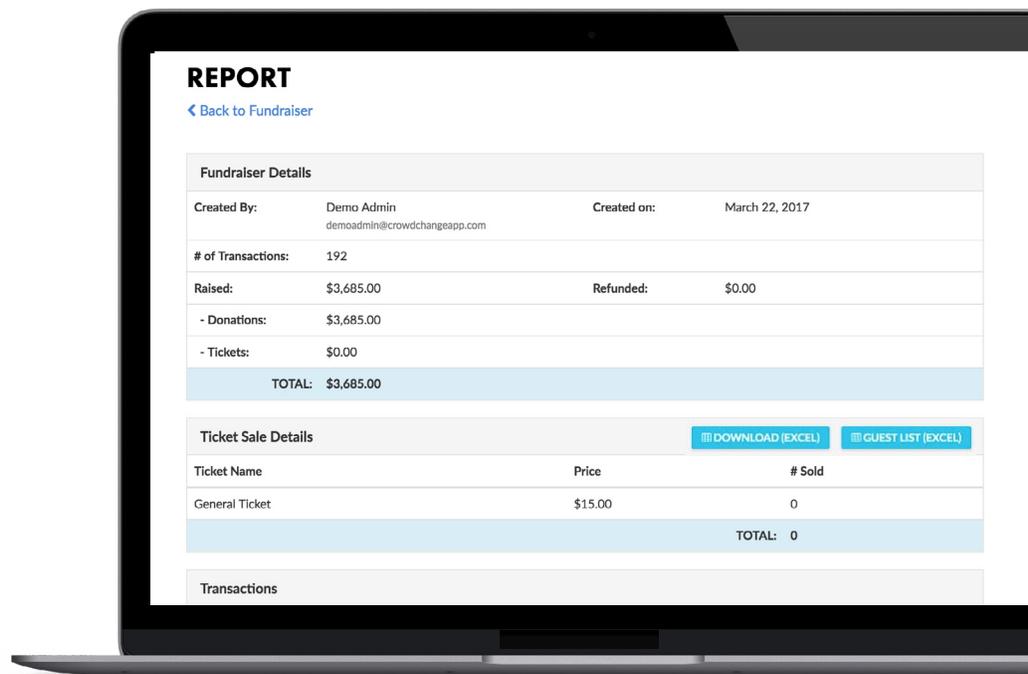
## Once you've started: Reporting and Guest Lists



**Access your report:** Once you have created a fundraiser, you can click on the “Report” button to view fundraiser information, including a breakdown of ticket sales, apparel, donations, and more.

**Guest List:** By clicking “Guest List (Excel),” CrowdChange will email you a guest list. Included will be the names of everyone that purchased tickets, registration and/or apparel in an Excel file.

**Download Excel:** This is a more detailed report that includes answers to custom questions, sponsorship levels, donor email addresses, amounts raised by team & personal fundraising pages and more.



Thanks for following along and good luck with your fundraiser!