

CROWDCHANGE HOW-TO-GUIDE

# How to Start Your CrowdChange Event

*Donations, tickets, and more*



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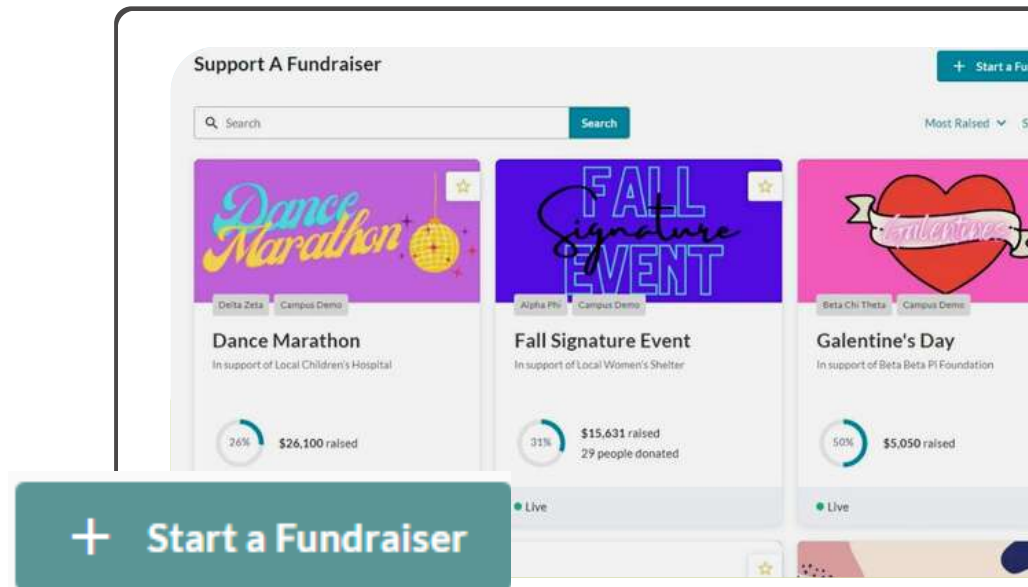
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# WELCOME!

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

To get started, simply click the “Start a Fundraiser” button on your CrowdChange site.

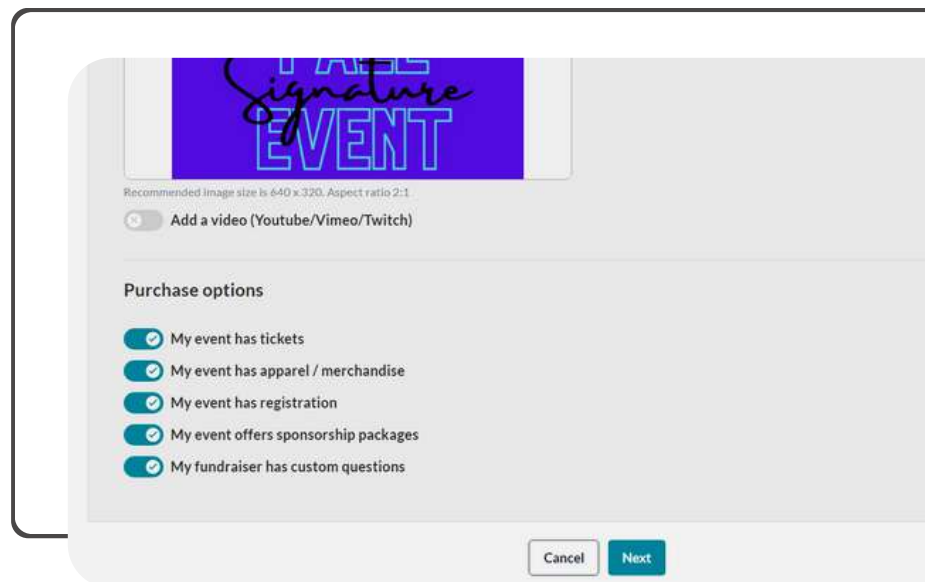


## STEP 2: CREATE FUNDRAISER

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 or location, leave these features toggled off.

Use the purchase options as an event checklist to select which types of features you'd like to offer your supporters. Once enabled, you'll be prompted to add in the details later.

Once complete, click "**Next**" to continue.



# TIPS & TRICKS

## MANY CONSIDER THIS TO BE THE #1 TIP TO RAISING MORE MONEY ON CROWDCHANGE:

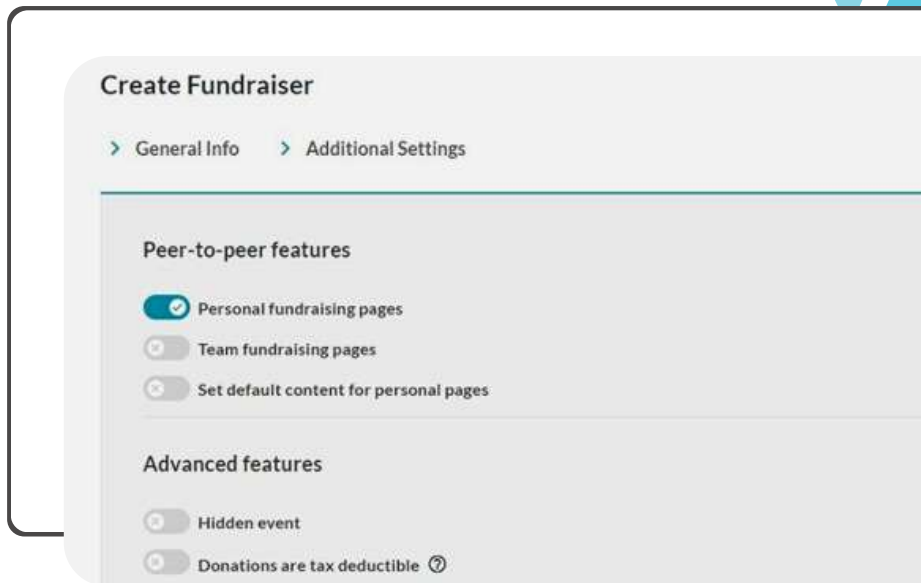
We encourage you to take five minutes in a chapter meeting to get everyone in your chapter to create a personal page and send it to five people WHILE IN THE MEETING. People can share this personal page with family and friends as a way to receive additional donations..

## PERSONAL FUNDRAISING PAGES:

This is a great way to engage your donors and raise more for your event. It allows everyone in your chapter to create a personal fundraising page that is part of your broader fundraising page. Toggle on the “Personal Fundraising Pages” button to enable this.

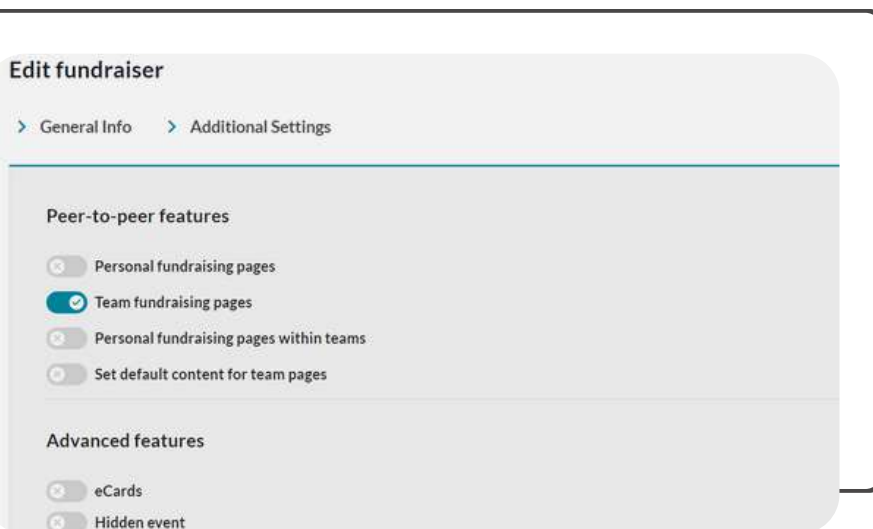
A button will be added to your fundraiser which participants can use to create their pages.

Make sure that your chapter members create a personal page within your fundraiser - NOT a new fundraiser altogether.



## TEAM FUNDRAISING PAGES:

This will enable you to create team fundraising pages as part of the broader fundraising page (e.g. for different fraternities participating in an event). These pages will appear in a leaderboard format on the main fundraising page. Toggle on the “Team Fundraising Pages” button to enable this feature.





## ADVANCED FEATURES:

Here you can choose to show the donor list, stop accepting donations on a certain date, modify the suggested donation amounts, and more.

To help you raise even more money, we have a feature where you can make it mandatory or optional for donors to cover transaction fees. When left on optional, we find that 93% of the time donors choose to cover the fees.

The 'Advanced features' panel includes the following options:

- eCards:** Enabled (toggle). A dropdown menu shows 'eCards' selected. A note reads: 'Select Tribute Cards if you would like to send cards to groups of individuals, otherwise select eCards.'
- Hidden event:** Disabled (toggle).
- Accept donations:** Enabled (toggle).
- Modify Donation Bar amounts:** Enabled (toggle). Below this are five input fields for suggested donation amounts: \$15, \$25, \$50, \$100, and \$500.
- Show list of donors:** Enabled (toggle). A dropdown menu shows 'Recent Donations' selected.
- Start accepting funds on date:** Disabled (toggle).
- Stop accepting funds on date:** Disabled (toggle).
- Only show on the site this fundraiser was created on:** Disabled (toggle).

## FEATURE HIGHLIGHT: ECARDS

Enable eCards on your fundraiser to create digital greeting cards in seconds that can be purchased and automatically sent out by donors via email or SMS!

When setting up eCards, you can simply click Add Card, upload an image, and set a tag and price for each card.

eCards are a great addition to an existing fundraiser, or they can be used on their own as an "eCard store".

The 'Add eCards' interface shows two card templates:

- Card 1:** A pink card with a repeating 'XO' pattern and the text 'I LOVE YOU' in large white letters. Below the card, it says 'I Love You Free' and has an 'Add' button.
- Card 2:** A red card with a pattern of white hearts and the text 'Galentine's Day' in a white script font. Below the card, it says 'Galentine's Day \$5.00'.

## STEP 3: CUSTOMIZE TICKETS:

Click Add Ticket Tier to begin filling in your ticket information. Everyone who buys a ticket will get an email with a PDF ticket attached. As the event organizer, you will be able to download a full guest list with one click.

When checking in guests, you can utilize our Ticket Scanner feature. Turn this on when editing your fundraiser then head to "Edit Mode", "Advanced Settings", "Setup", "Scanners", and follow the prompts!

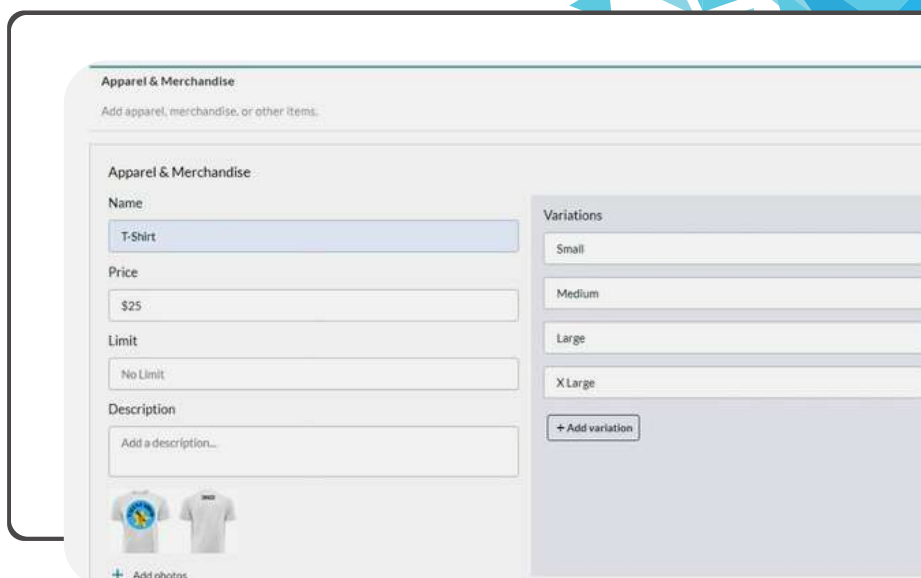
The 'Purchase options' form includes the following fields:

- Tickets:** A section header with a subtext 'Add tickets for this fundraiser.'
- Ticket Name:** A text input field with 'General Admission' entered.
- Price:** A text input field with '\$10' entered.
- Limit:** A text input field with '100' entered.
- Description:** A text input field with 'General entry to our event' entered.
- Variations:** A section with a '+ Add variation' button.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

## 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 colors you would like to offer by clicking "Add variation" located to the right of the name field.

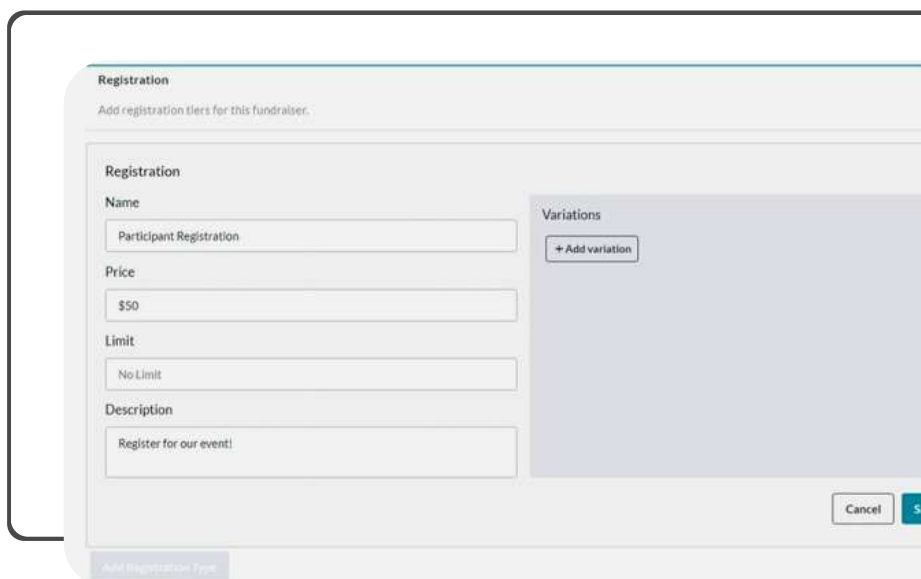


The screenshot shows the 'Apparel & Merchandise' form. At the top, it says 'Add apparel, merchandise, or other items.' The form has several fields: 'Name' (containing 'T-Shirt'), 'Price' (containing '\$25'), 'Limit' (containing 'No Limit'), and 'Description' (containing 'Add a description...'). To the right of the 'Name' field is a 'Variations' section with input fields for 'Small', 'Medium', 'Large', and 'X Large', and a '+ Add variation' button. At the bottom left, there are two small images of t-shirts and a '+ Add photos' button.

## 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 pay and register directly online. All participant information can be downloaded, with one click, right to Excel.

For events with registration that includes a t-shirt, simply put the name as "Registration + t-shirt" and utilize the variation feature to collect sizes from participants that register.



The screenshot shows the 'Registration' form. At the top, it says 'Add registration tiers for this fundraiser.' The form has several fields: 'Name' (containing 'Participant Registration'), 'Price' (containing '\$50'), 'Limit' (containing 'No Limit'), and 'Description' (containing 'Register for our event!'). To the right of the 'Name' field is a 'Variations' section with a '+ Add variation' button. At the bottom right, there are 'Cancel' and 'Save' buttons. At the bottom left, there is a '+ Add Registration Type' button.

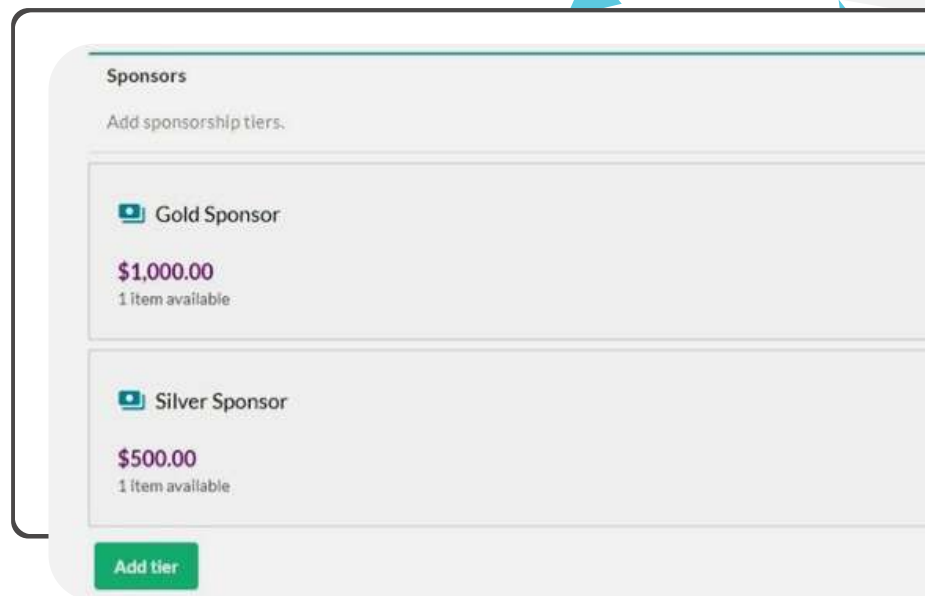


## SPONSORSHIP PACKAGES:

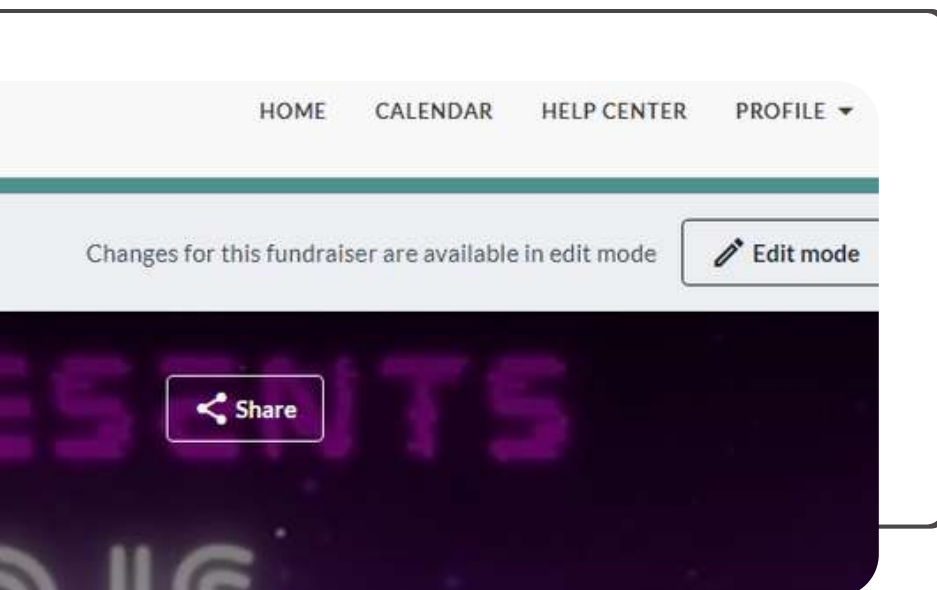
Chapters can engage larger donors through our sponsorship feature.

Create as many different sponsorship tiers and price points as you wish to offer, and sponsors can purchase a sponsorship package online directly through your page.

Common sponsorship tiers include offering the naming rights for the event, including company logos on apparel and incorporating company logos on event signage.



## ONCE YOU'VE STARTED: EDITING, ADDITIONAL FEATURES, AND FLOW OF FUNDS



### EDITING:

At any point, you can enter Edit Mode by selecting the "Edit Mode" button (top-right) to update or remove features, change your fundraiser's layout, theme, and basic information.

To edit Purchase Options, select the "Edit Mode" button, click the "Advanced Settings" button (top-left), then click "Setup" and select the option you'd like to edit.

## ACCESS YOUR REPORT:

Once you have created a fundraiser, you can click select the "Edit Mode" button, click "Advanced Settings" (top-left) and then select the "Reports" button to view fundraiser information, including a breakdown of ticket sales, apparel, donations, and more.

You can also receive a download link for a detailed Excel file of this report by clicking the "Download" button.

### Detailed Report

Click on the Item to view details

🔍 Type name, email or address to filter transactions

ID	Name	Email
299471	Abigail Carberry	abby@crowdchange.co
299341	Liam Moore	liam@crowdchange.co
299244	Liam Moore	liam@crowdchange.co
299228	Travis Earl	travis@crowdchange.co
299021	Liam Moore	liam@crowdchange.co

## ACCESS MANAGER

Control who has special access to your fundraiser through the Access Manager feature!

You can find this feature in Edit Mode by selecting the "Advanced Settings" button, "Setup", and "Access Manager".

Add additional fundraiser hosts by inputting their email address and selecting which features they can have access to!

## MAILING LIST

Our Mailing List feature allows you to send email campaigns directly from your CrowdChange fundraiser!

In Edit Mode, click the "Advanced Settings" button, "Setup", and select "Mailing List".

Upload your contacts with a CSV file, create your messaging, and send it out when you're ready!

This feature is great for alumni communication and if you had this event on CrowdChange last year, consider contacting those supporters to encourage them to participate again.

## MILESTONES

Milestones are a great way to keep your fundraiser participants and supporters in the loop on your event details and progress!

To access this feature, enter Edit Mode, click the "Advanced Settings" button, "Setup", and "Milestones".

Start from scratch or select a template to begin. Follow the prompts provided. Create multiple milestones to fit the needs of your event!

## BANKING

When creating your fundraising page, you'll need to choose which banking option you'd like to implement for your page:

1. **Funds flow directly to your National Organization/Foundation/Beneficiary.** In this case, you may not be able to be reimbursed for costs associated with running your fundraiser. For more information, reference the Setup Banking notification on your page's Setup Guide, or reach out directly to your National Headquarters.
2. **All funds will flow directly to your chapter's bank account.** To connect your bank account after creating your fundraising page, login to your account and click the Profile button (top-right corner), then select My Profile. From the left-hand menu, click My Banking and enter the required fields.