Managing your Fundraisers

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Agenda

- Overview
- Setting Up a New Fundraiser Campaign
- Sharing the Donation Link
- Managing Donations
- Fundraising Reports

Working with Fundraisers...

You may have many types of Fundraisers. Supporting Programs, Community Causes, Scholarships, etc.

The Fundraiser module will make it easy for you to promote your fundraiser and manage donations
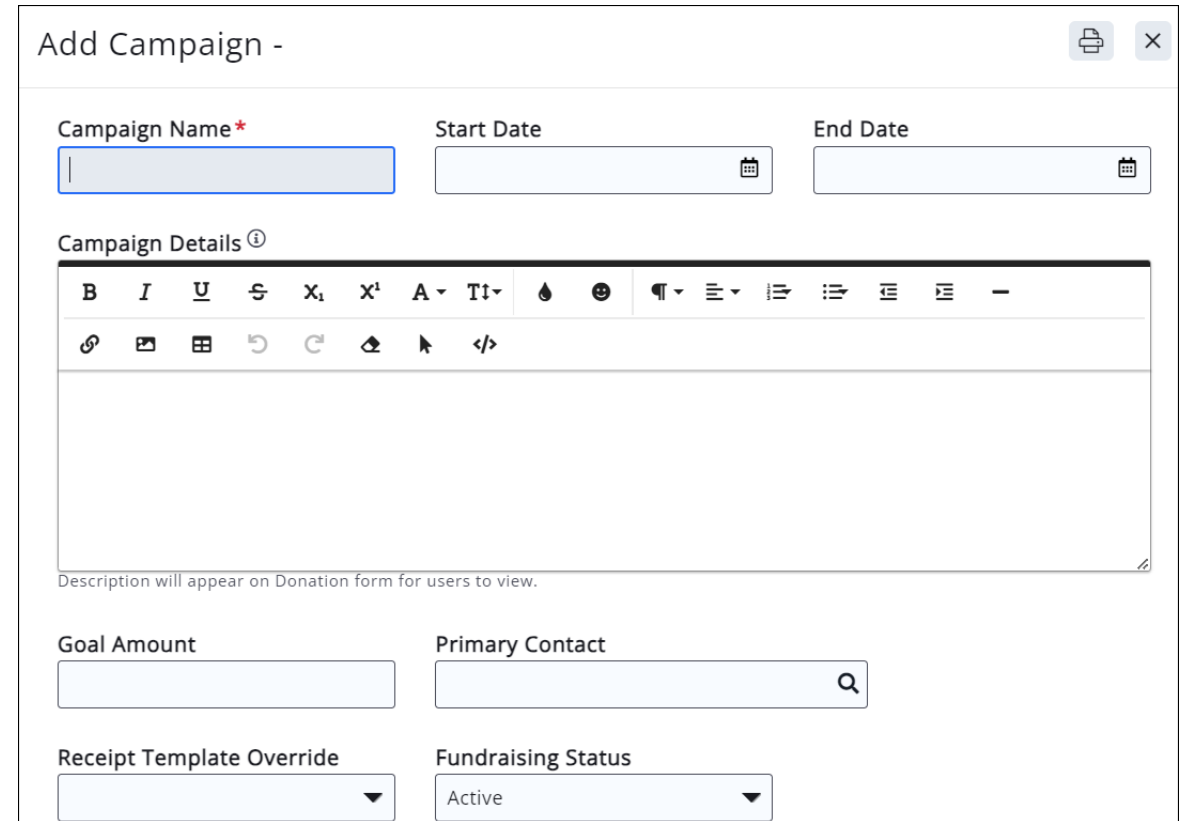
Pre-requisites

- Setup Fee Items to be used for donations/you wish to be sent after someone contributes pledges. Type = Donation
- Create an Email Template that will be sent as a thank you to your donors
- If you wish to use a separate gateway for donations, configure the required gateway

Add Your Fundraiser Campaign

Provide a name and description of your campaign both are displayed on your fundraiser page, make them compelling with a call to action!

See recommendations: Increase Charitable Donations With These 5 Words

KB: Add a Fundraiser Campaign

Setup a Fundraiser Campaign

Setup a Fundraiser Campaign

Assign Donation Fees
- Suggest Donation Amounts
- Allow Donors to Setup a Recurring Donation
- Allow Donors to enter own Amount
- Allow Donations on behalf of Organization

Donation/Pledge Items ⊕

Fee Item	Description	Minimum Amount	Suggested Amount	Is Pledge	
Small Business Donations	Small Business Donations	$5.00	$25.00	Yes	•••

Share your Campaign

- ✓ A link to your campaign page is automatically created on the Setup screen
- ✓ This link can be shared in a variety of ways, i.e. via mass email, embedded as a page on your web-site, etc.

Click here to Donate today!

Businesses across our community are being negatively affected by the economic effects of COVID-19A and need your support! These are our friends and neighbors, and we believe it's important we help them confront the economic challenges they face. Green Valley Chamber has created A Small Business Relief Fund to help! Our goal is to help our neighborhood small businesses maintain their livelihood, and continue to foster a vibrant community during these difficult times.

Update/Edit Campaign Details

Changes/Updates to the basic information (displayed on the Summary tab) by clicking Edit Campaign

KB: Update Campaign Details
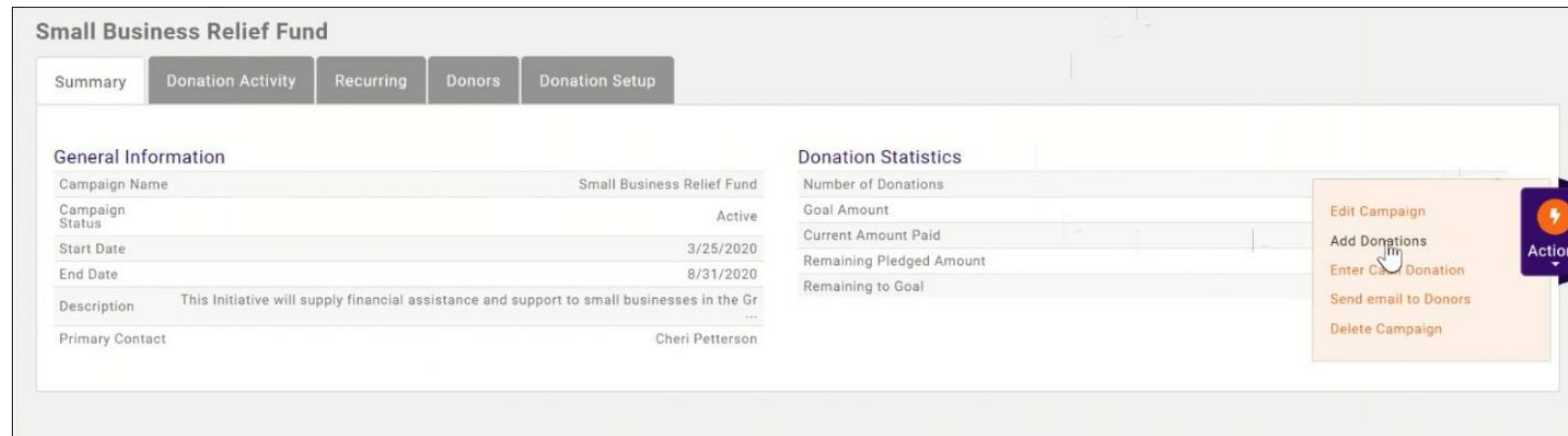
Donation Process Flow

1. Donation is entered from the donation form or from the back-office
2. A Thank You email is sent to the Donor
3. Staff who have subscribed to "On-line Donation Notice" will receive a notification
4. If the donor chose to pay by credit card:
   - Invoice & payment recorded on the donor's Billing tab
   - If the donor has chosen a recurring option, schedule is setup on the Billing tab
5. If the donor chose to be invoiced
   - An invoice is generated, <u>not sent</u>
   - The invoice is recorded on the contact's Billing tab
   - If the donor has chosen a recurring option, schedule is setup on the Billing tab

IMPORTANT: If the donor is NOT a contact in your database, one will be created as a Non Member

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Manage Donations

Enter a Donation from the Back-office
- If you are contacted by a donor, and they wish you to enter a donation for them, you can easily do this from the back-office
- KB: Manually Add Donations from the Back-office

Manage Donations

Enter a Donation & Check from the Back-office

✓ You can easily add the donation information and the payment at the same time. This process is not used to pay an existing invoice

✓ KB: Add a Donor & Check Simultaneously

View All Donation Activity

You can view a summary of all donations, on the Donors tab
KB: View List of Donors

Contact	Description	Total	Paid	Type	Transaction Date	Ref #	Actions
Cheri Petterson	Small Business Donations	$200.00	$0.00	Non-Pledge Recurring Donation	8/11/2022	1600	
Cheri Petterson	Small Business Donations	$200.00	$0.00	Non-Pledge Recurring Donation	11/13/2021	1001	
Cheri Petterson	Small Business Donations	$200.00	$0.00	Non-Pledge Recurring Donation	11/13/2020	684	
A Place for Dogs	Small Business Donations	$100.00	$100.00	Pledged Donation	11/9/2020	414	
Dana's Clubhouse	Small Business Donations	$55.00	$0.00	Pledged Donation	8/27/2020	731	

Manage Recurring Donations

You can view and manage donors who have recurring donations on the fundraiser Recurring tab

KB: Manage Recurring Donations

View Full List of Donors

You can view the full list of your donors on the Donors tab.
KB: View List of Donors

Send an E-mail to all Donors

After responding to an appeal, donors are too often left wondering how their money is being used and whether it will actually have an impact…

Keep your donors up to date on how the funds are being used!

KB: Send an E-mail to all Donors

See other ideas for keeping in touch with your donors: https://www.classy.org/blog/want-donors-to-give-again-read-this/

Donation Reports

Fundraiser History by Donor: The Fundraising History By Donor Report allows you to easily view the sum of donations for individual donors or all donors.

KB: Fundraiser History by Donor

Donor Name	Campaign Name	Donation/Pledge Item	Donation/Pledge Description	Donation Date	Donor Email	Donor Address	Donor City	Donor State Province	Donor Postal	Donor Phone	Is Pledge	Frequency	Schedule End Date
A Place for Dogs													
	Small Business Relief Fund	Small Business Donations	Small Business Donations	3/26/2020	info@mailiantor.com	1384 Crooked Lake Rd	Deerwood	MN	56444	(218) 786-0987	Yes	Quarterly	9/26/202
A Place for Dogs Count 1													
Allison Wilson													
	Special Olympics	Special Olympics Pledge	Special Olympics Pledge	12/21/2020	wilson@mailinator.com	8574 Main Street	Nisswa	MN	56468		No	Annually	
	Special Olympics	Special Olympics Pledge	Special Olympics Pledge	12/21/2019	wilson@mailinator.com	8574 Main Street	Nisswa	MN	56468		No	Annually	
	Special Olympics	Special Olympics Pledge	Special Olympics Pledge	12/21/2018	wilson@mailinator.com	8574 Main Street	Nisswa	MN	56468		Yes	Annually	

Donation Reports

Recurring Donations Report: The **Recurring Donations Report** allows you to generate a list of all contacts who have setup recurring donations for a fundraiser. This may be useful in budgeting and planning.

KB: Recurring Donations Report

Results: 13

Donor Name ⇅	Campaign Name ⇅	Pledge/Donation Item ⇅	Status ⇅	Gift Designation ⇅	Donation Created Date ⇅	Donation Start Date ⇅	Donation End Date ⇅	Total Donation Amount ⇅	Donation Amount Paid ⇅	Donation Amount Remaining ⇅	Tribute Name ⇅	Frequency ⇅
Jill Haugene	2020 Small Business Relief Campaign	Small Business Donations	Inactive	2020 Small Business Donations	3/27/2020 12:00:00 AM +00:00	3/27/2020	3/27/2030	375.00	0.00	0.00		Annually
Rachel Fransone	New 2020 Business Relief Fund	Small Business Donations	Active	Small Business Relief Fund Donation	3/30/2020 12:00:00 AM +00:00	3/30/2020	3/30/2021	1,300.00	0.00	1,300.00		Monthly
Maria Searson	New 2020 Business Relief Fund	Small Business Donations	Active	Small Business Relief Fund Donation	5/12/2020 12:00:00 AM +00:00	5/12/2020	5/12/2021	1,300.00	100.00	1,200.00		Monthly

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In conclusion…

A great way to support your community businesses is to start a fundraising campaign. GrowthZone is helping through the Fundraising Module.

See full details and instructions in our on-line KB: Fundraising

Questions?

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