



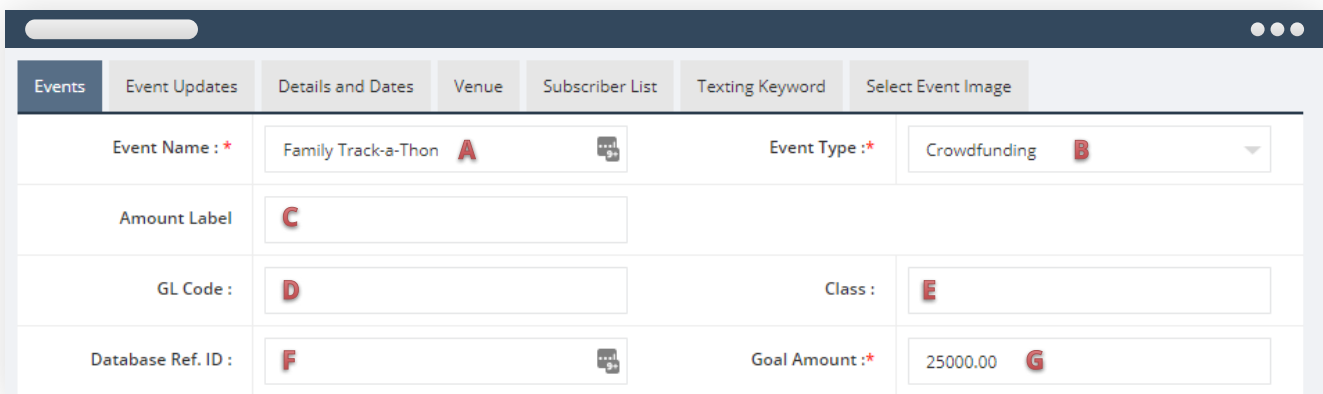
HOW-TO GUIDE

Guide to Crowdfunding Advanced Setup

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Crowdfunding is just as it sounds – a social way to donate towards a common goal, or fund. With this type of event, your donors will see the fundraising goal, the progress towards it, who else contributed, and the ability to share it on social media. Not only can you raise monetary support for your cause, but you can gain social support for it as well.

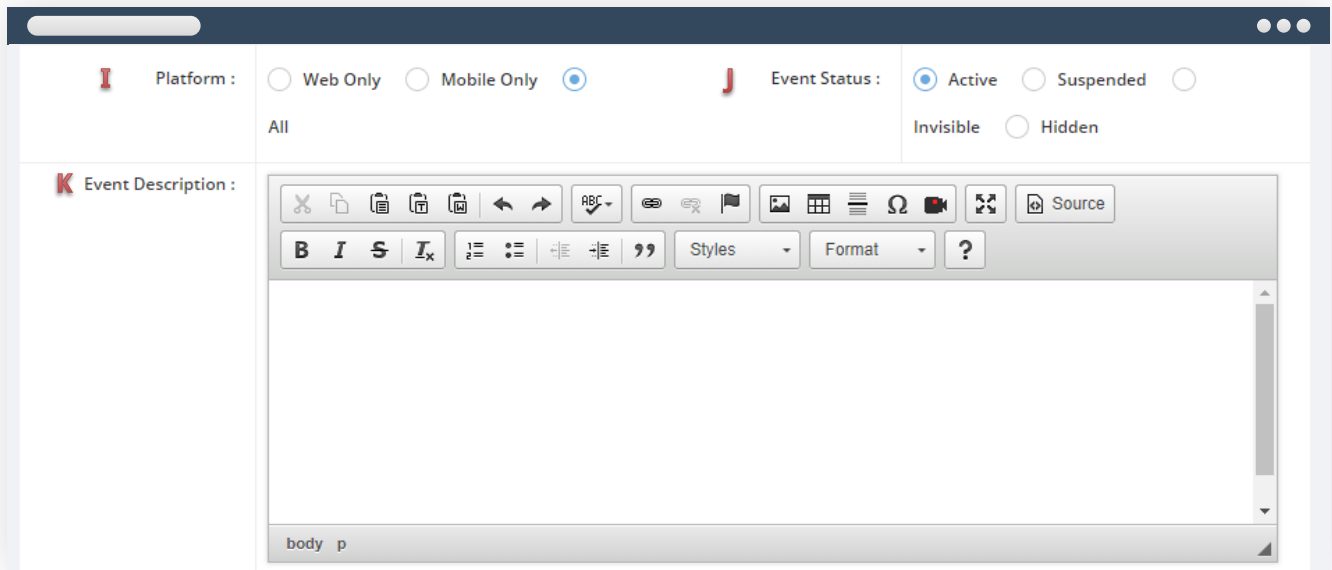
STEP 1: Events



Events	Event Updates	Details and Dates	Venue	Subscriber List	Texting Keyword	Select Event Image
Event Name : *	Family Track-a-Thon A			Event Type :*	Crowdfunding B	
Amount Label	C					
GL Code :	D			Class :	E	
Database Ref. ID :	F			Goal Amount :*	25000.00 G	

- (A) Event Name**
Text for the name of the event to display on front- and back-end, and reports. It's searchable, so use the same name your organization commonly uses for this event so your donors can find it easily.
- (B) Event Type**
Crowdfunding
- (C) Amount Label**
Caption for the amount field (on dynamic pages only).
- (D) GL CODE**
Location accounting code for reporting and bank reconciliation purposes if your organization uses QuickBooks.
- (E) Class**
Location class code for reporting and reconciliation in QuickBooks.
- (F) Database Ref ID**
Location code for database reporting if you export to an external church system, such as PDS or ParishSOFT.
- (G) Goal Amount**
Target to display on progress tracker URL page for event.

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(H) Add Custom Fields

Collect plain text data from donors on GC web event transactions

(I) Platform

Toggle display of event on location sites

(J) Event Status

Active: displays on GC web, mobile and dynamic pages: it's searchable and can be donated to with one-time or scheduled transactions

Suspended: are paused events which have not yet started, have ended, or are on a hiatus until the next season that donations will be accepted; these events store in your Archived Events section, so you can edit at any time, make active, or just store them for record.

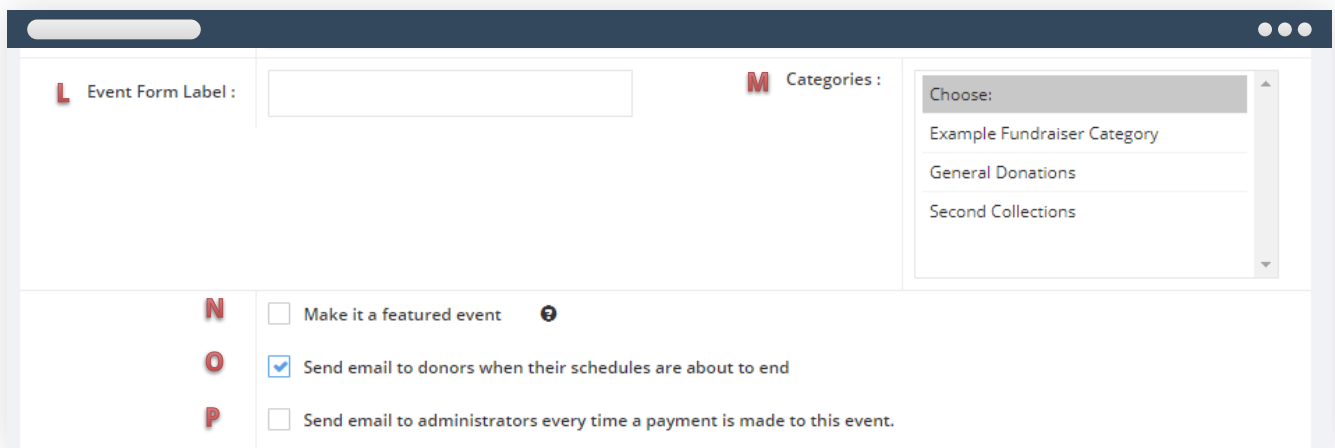
Invisible: are active events that are not visible to the public; these events are for your administrator use only to process payments

Hidden: an active event that's visible only on dynamic custom pages; these events are hidden from GC web/mobile "Ways to Give" listings and are not searchable; this status is helpful when you're collecting additional data with transactions on a dynamic custom page, such as guests' names, or t-shirt sizes


(K) Event Description

If you wish to include extra information about your event, you may enter it here. Helpful information for your donors is a fundraiser's location, date, and time, deadlines, or a small narrative about who the donation will be benefiting. HTML source editing and inline CSS allowed; iframes and embedded content are disallowed

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The screenshot shows a web form with the following elements:

- L Event Form Label :** An empty text input field.
- M Categories :** A dropdown menu with the following options: 'Choose:', 'Example Fundraiser Category', 'General Donations', and 'Second Collections'.
- N** Make it a featured event 
- O** Send email to donors when their schedules are about to end
- P** Send email to administrators every time a payment is made to this event.

• (L) Event Form Label

The default payment label says 'Make a Contribution' however this event may be for a different purpose, such as a program fee or dinner-dance ticket. Use this field to enter an alternative label, such as 'Buy a T-Shirt' or 'Reserve Your Seat'

• (M) Categories

You may choose whether to include this event in one of your existing categories. To include an event in multiple categories, hold down the Ctrl (or Command on a Mac) key while you select each category name; searching via category helps your donors find events that pertain to their specific involvement in your organization

• (N) Make it a featured event

To make this be one of the first four that appear on your GiveCentral home page, check this box

• (O) Send email to donors when schedules end

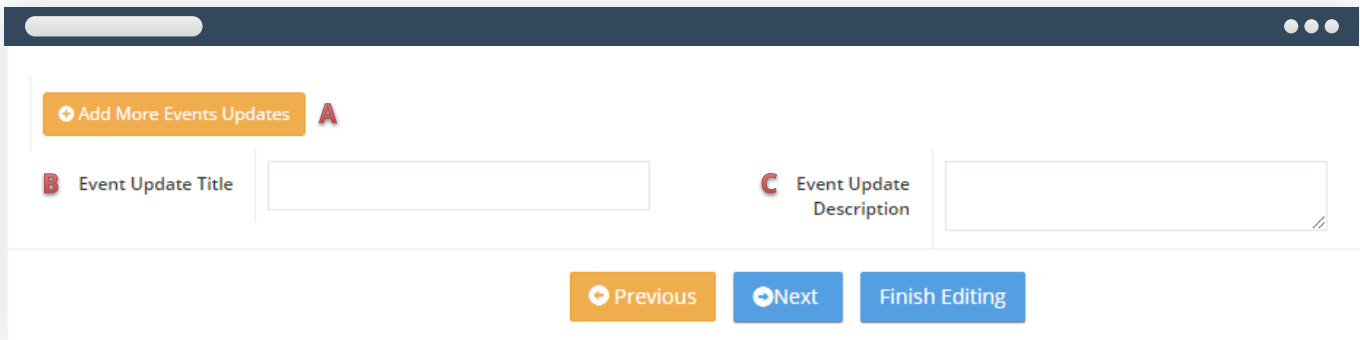
For recurring donations, you have the option to email donors when their schedules are about to end, prompting them to extend their donation date.

• (P) Send email to administrators when payments are made

If you want admins to receive email notifications every time a payment is processed for this event, toggle this checkbox and list the admin emails, separating multiple email addresses with commas

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STEP 2: Crowdfunding Event Progress Updates



- (A) Add More Event Updates**

Create news updates about event for subscribed email donors and display on GC web event updates tab

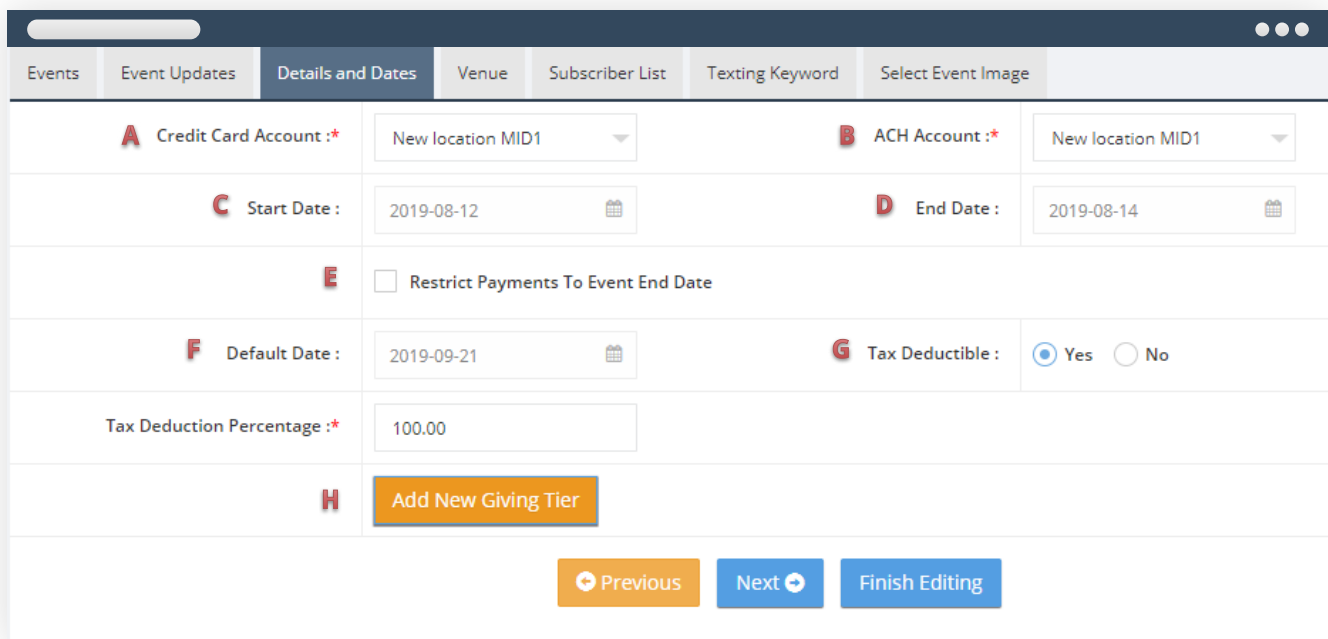
- (B) Event Update Title**

Subject for the update

- (C) Event Update Description**

Event Update Description

STEP 3: Crowdfunding Event Details and Dates



- (A) Credit Card Account**

MID for settlement of credit card payments to this event from all sources

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(B) ACH Account

MID for settlement of ACH payments to this event from all sources

(C) Start Date

Beginning date event will be visible for donors

(D) End Date

End date (11:59pm) after which the event will no longer be visible

(E) Restrict Payments to End Date

This option applies to ongoing donations that automatically end at the event end date; since crowdfunding donations are a one-time payment this is not applicable

(G) Tax Deductible

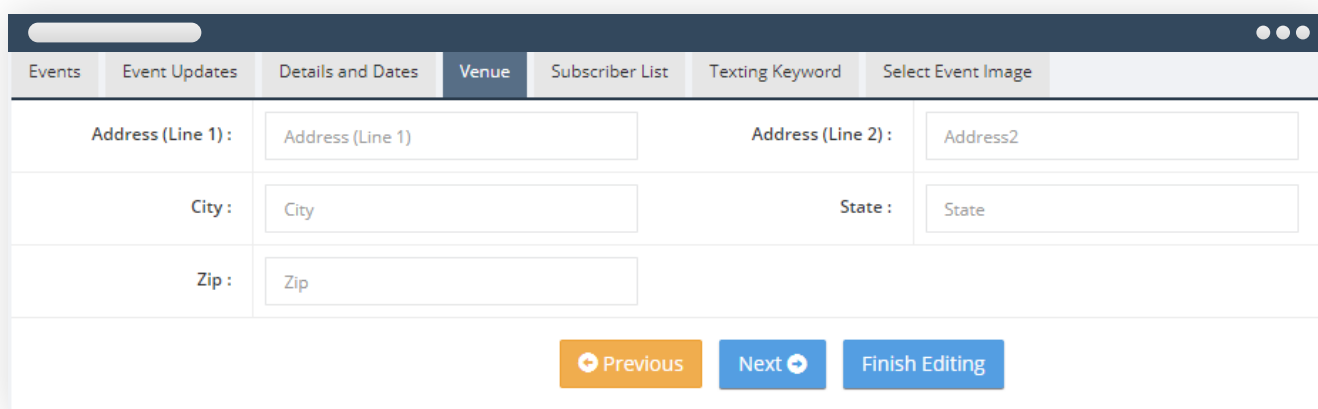
Select Yes, and fill in the box that appears so your donors' year-end tax statements display the correct amount. As a non-profit organization, most funds you collect donations for are 100% tax-deductible, but some (such as event tickets or items you may sell for fundraisers) are not. Enter the appropriate percentage and donors will see this information included when they run reports on their own giving

(H) Add New Giving Tier

For dynamic custom pages only, you can create custom giving tiers to motivate donors toward higher gifts. Add tiers (such as Gold, Silver, Bronze) and minimum/maximum gift amounts here:

- Provide a tier name (displays to donor) and floor/ceiling amount for each level
- Make sure that the highest tier includes the "and up" infinity option
- Do not overlap dollar amounts between tiers

STEP 4: Crowdfunding Event Venue



The screenshot shows a web interface for setting up an event venue. At the top, there are several tabs: Events, Event Updates, Details and Dates, Venue (which is currently selected), Subscriber List, Texting Keyword, and Select Event Image. Below the tabs is a form with the following fields:

Address (Line 1):	<input type="text" value="Address (Line 1)"/>	Address (Line 2):	<input type="text" value="Address2"/>
City:	<input type="text" value="City"/>	State:	<input type="text" value="State"/>
Zip:	<input type="text" value="Zip"/>		

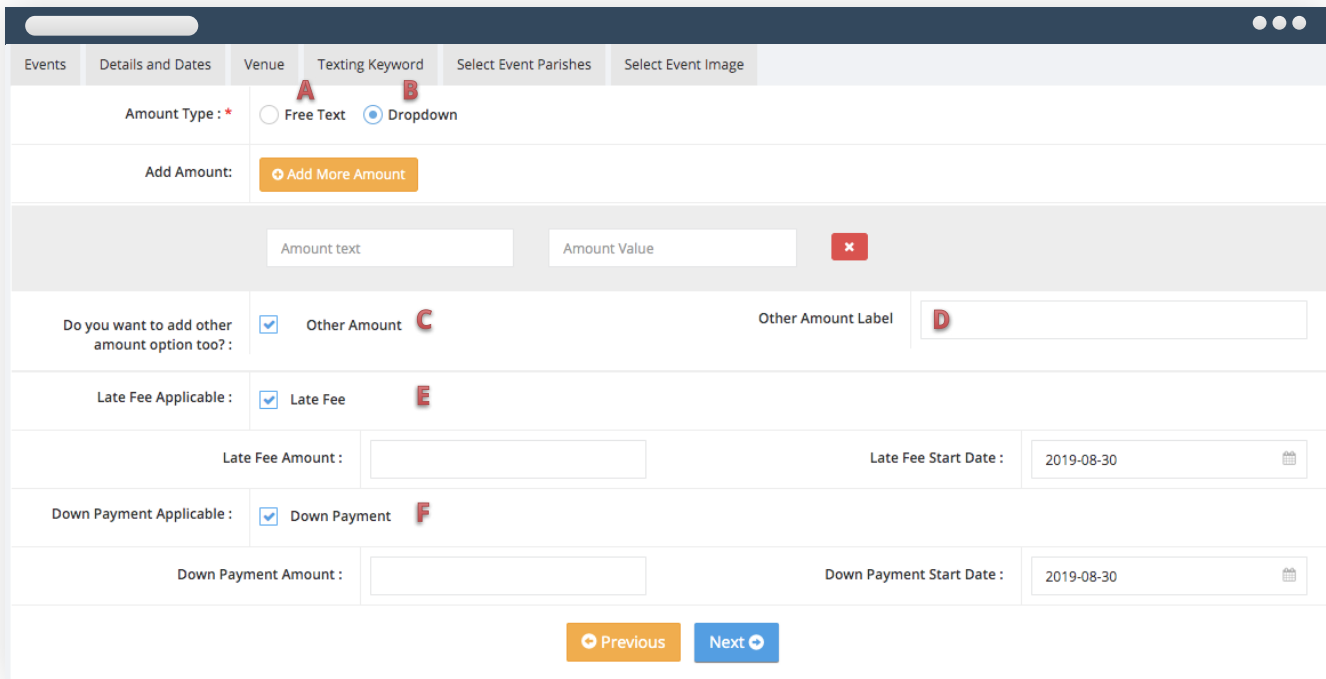
At the bottom of the form, there are three buttons: "Previous" (orange), "Next" (blue), and "Finish Editing" (blue).

Crowdfunding Event Venue

This is most useful for events, fundraisers and galas that are not held at your "usual" location, but it may also be left blank; entering complete information in these fields will generate a map that donors can click for directions

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Crowdfunding Event Terms



- (A) Amount Type - Free text**
Presents an open amount field for donor input
- (B) Amount Type - Dropdown**
Specify amount options for donor to choose
Add Amount > Add More Amount and repeat as needed

 - Amount Text: Displays in dropdown for donor (EX: \$5,000 Silver Donor)
 - Amount: Value that is stored for pledge amount (EX: 5000.00)
- (C) Do you want to add other amount too?**
Outputs "Other Amount" as an option in the dropdown list and allows donor to specify a different total amount
- (D) Other Amount Label**
Text to display for the Other Amount option
- (E) Late Fee Applicable**
Toggles a late charge for payments received after a certain date on dynamic pages

 - Late Fee Amount: specify the amount of late fee
 - Late Fee Start Date: date late fee begins
- (F) Down Payment Applicable**
Toggle to require an initial payment toward the gift on custom pages

 - Down Payment Amount: specify amount of down payment
 - Down Payment Start Date: when down payment is due/will process

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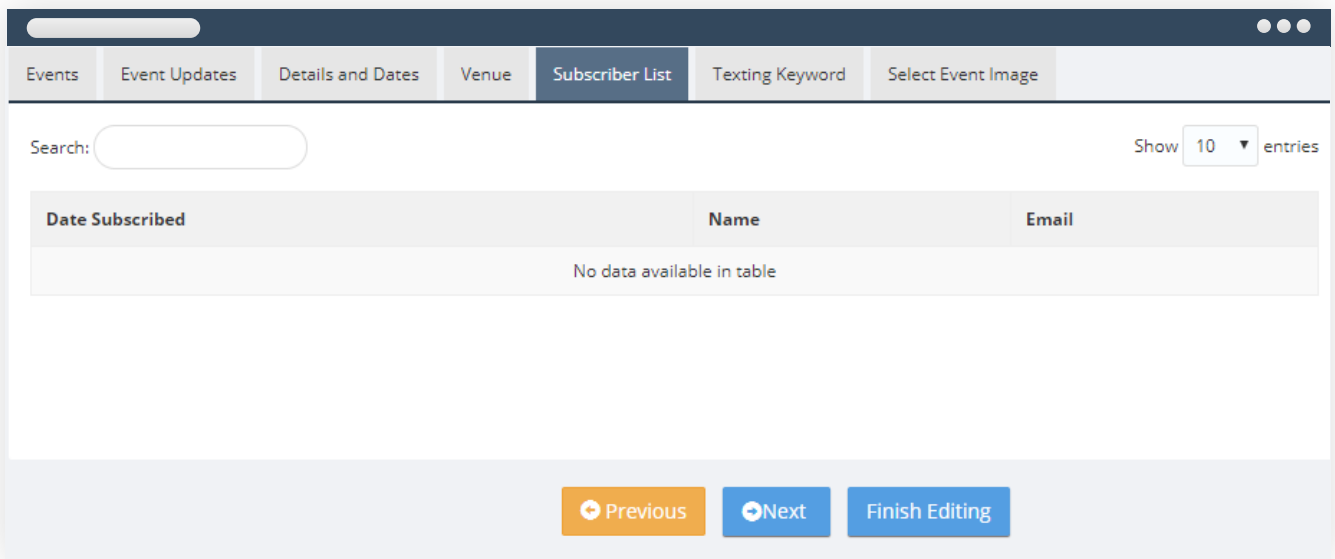
- (G) Do you wish to send an email at event sign up?

Toggle a custom email to send to donor when transaction is entered

Email subject: Text for the email

Email body: Text for the email content; HTML is acceptable

STEP 5: Crowdfunding Event Subscriber List



Events | Event Updates | Details and Dates | Venue | **Subscriber List** | Texting Keyword | Select Event Image

Search: Show 10 entries

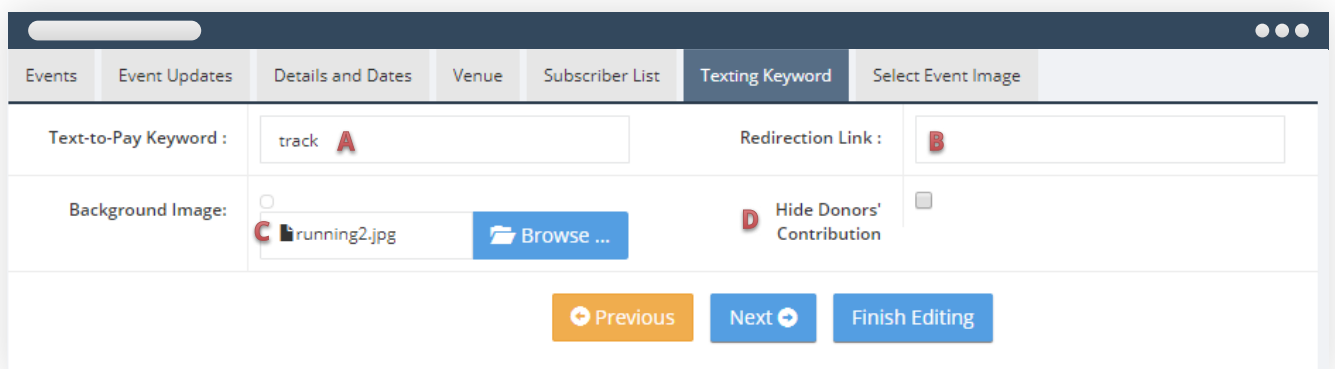
Date Subscribed	Name	Email
No data available in table		

Previous Next Finish Editing

- Report Listing

Donors who have opted to receive automated email notifications when event updates are published

STEP 6: Crowdfunding Event Texting Keyword



Events | Event Updates | Details and Dates | Venue | Subscriber List | **Texting Keyword** | Select Event Image

Text-to-Pay Keyword : track **A** Redirection Link : **B**

Background Image: **C** running2.jpg Browse ... **D** Hide Donors' Contribution

Previous Next Finish Editing

- (A) Text-to-Pay Keyword

Custom text (five-character minimum) for direct SMS to event

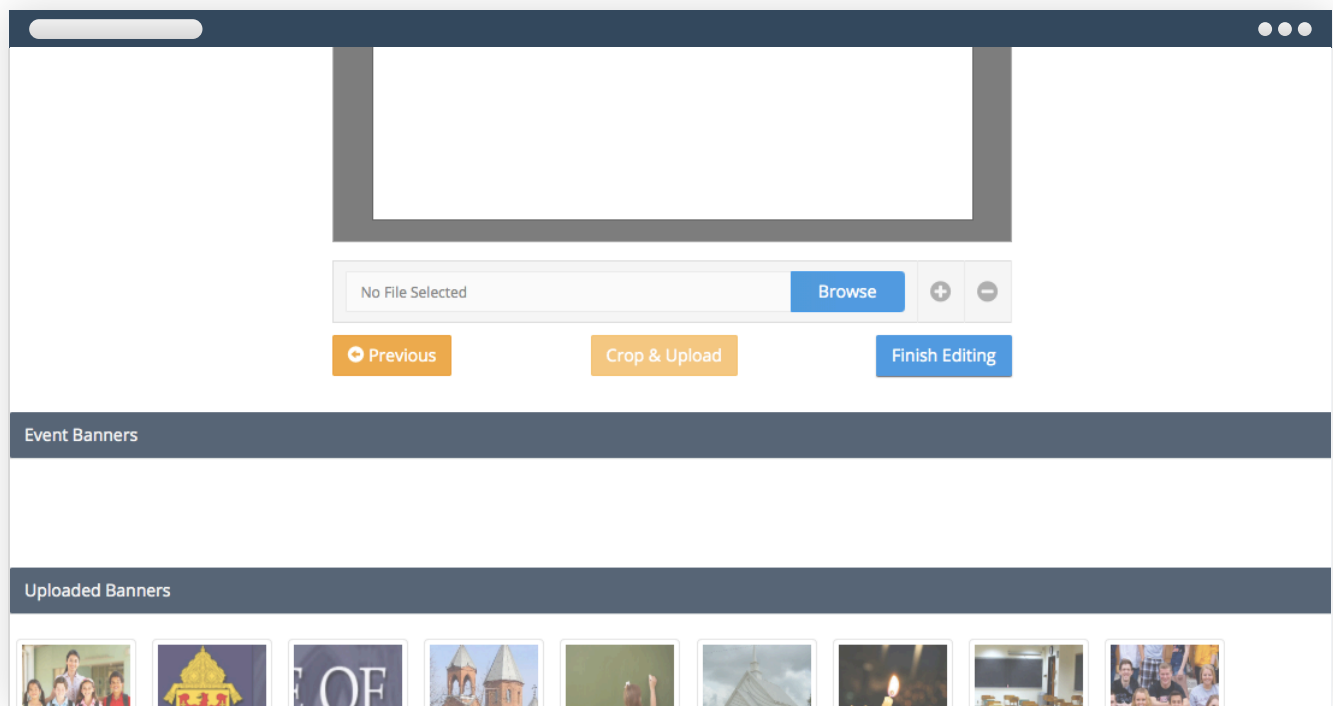
- (B) Redirection Link

URL for redirect after SMS process completes

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- **(C) Background Image**
 Displays behind event progress page; 800x800 minimum
- **(D) Hide Donors' Contribution**
 Toggles visibility of the gift amount on the scrolling display

STEP 7: Crowdfunding Event Image



- **Crop & Upload**
 You have the option to upload or select a pre-existing image to appear for your event. To upload, click Browse to select a JPG or PNG file of at least 500x500 pixels on your hard drive; you may also select an image from our gallery; once your desired image is in the preview window, zoom in or out by clicking either +/- and drag to position the image in box; when you're done click Crop & Upload to save the image