

fundrazr

petfundr

cocopay



Creating, Running, & Managing Peer-to-Peer Campaigns with ConnectionPoint

**FUNDRAISER
HUB** by 
connectionpoint

Agenda

- What are peer-to-peer campaigns?
- How do peer-to-peer campaign work?
- Creating your peer-to-peer campaign
- Setting up your peer-to-peer campaign
- Registration
- Campaign management
- Communication
- Resources

What Are Peer-to-Peer Campaigns?

A crowdfunding method that allows community and volunteers to raise money on behalf of your charity or organization. Peer-to-peer campaigns are great tools to engage your supporters, involve a wider network, acquire new donors and raise more money for your cause.

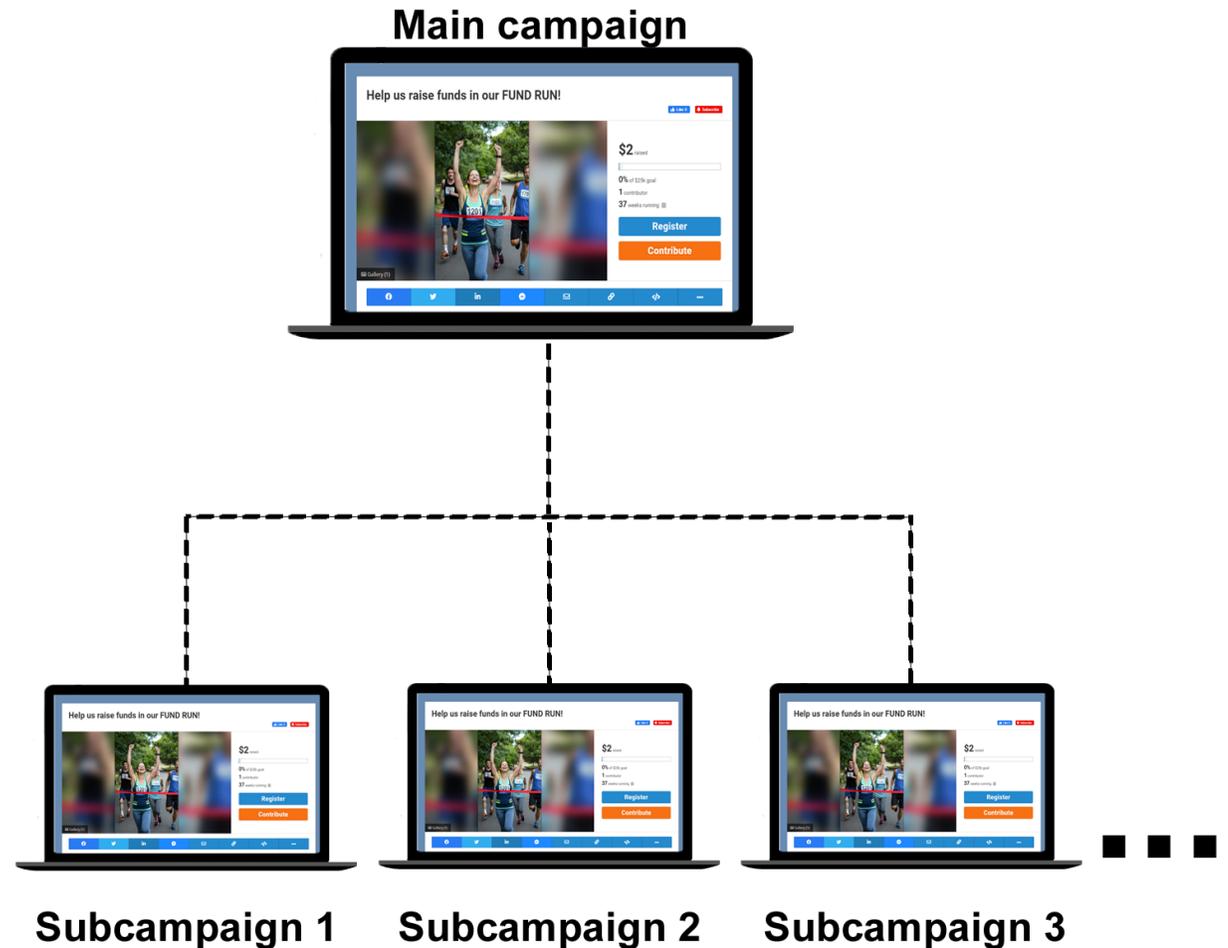
They can be:

- In-person live events
- Virtual events
- A hybrid (in-person and virtual options)
- Not involve an event at all

How Do Peer-to-Peer Campaigns Work?

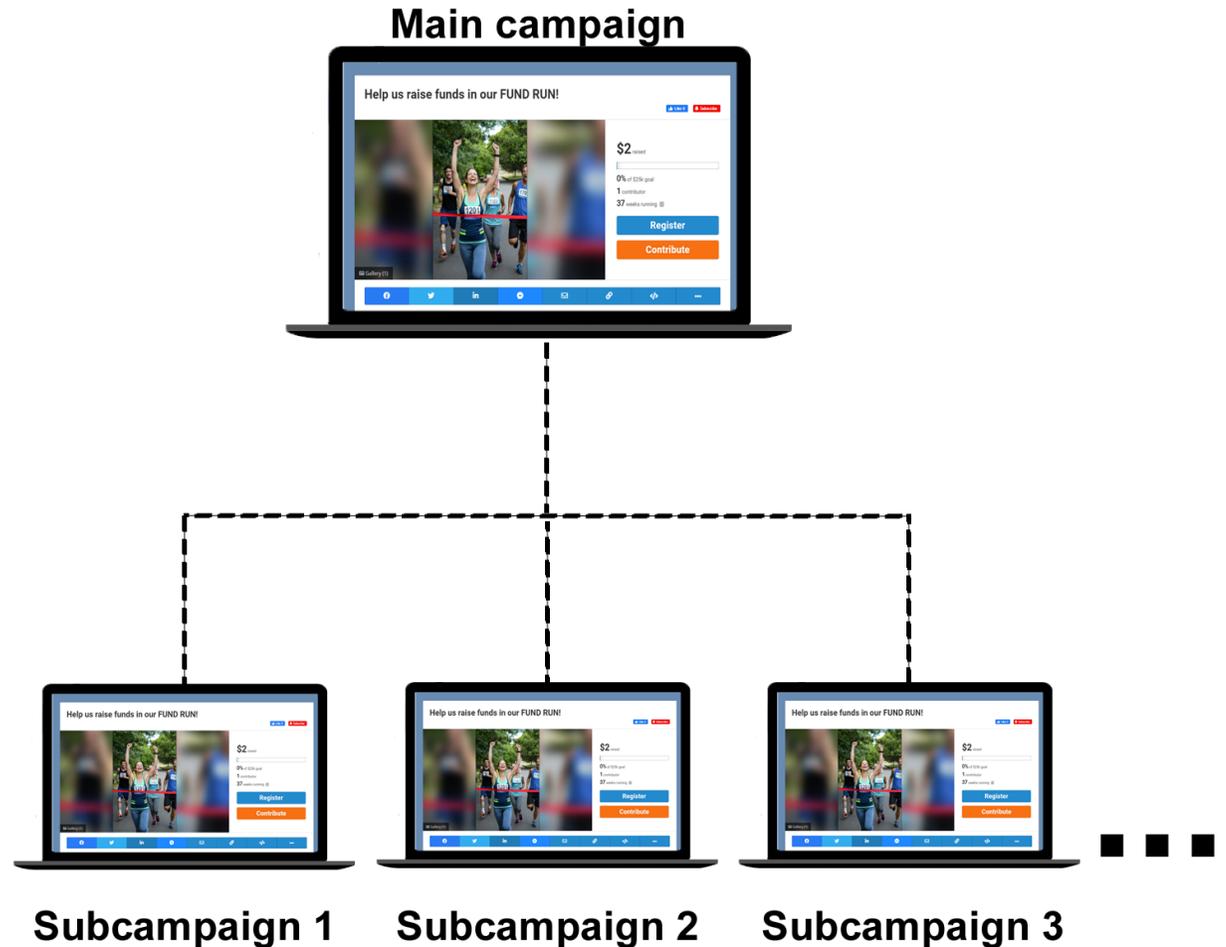
Peer-to-peer campaigns have two tiers:

1. Main campaign:
 - One per event;
 - Set up by the organization (you) as the first tier
2. Sub-campaigns:
 - Unlimited number;
 - Umbrellaed under the main campaign (second tier);
 - Each can be run by a different individual or team of individuals.



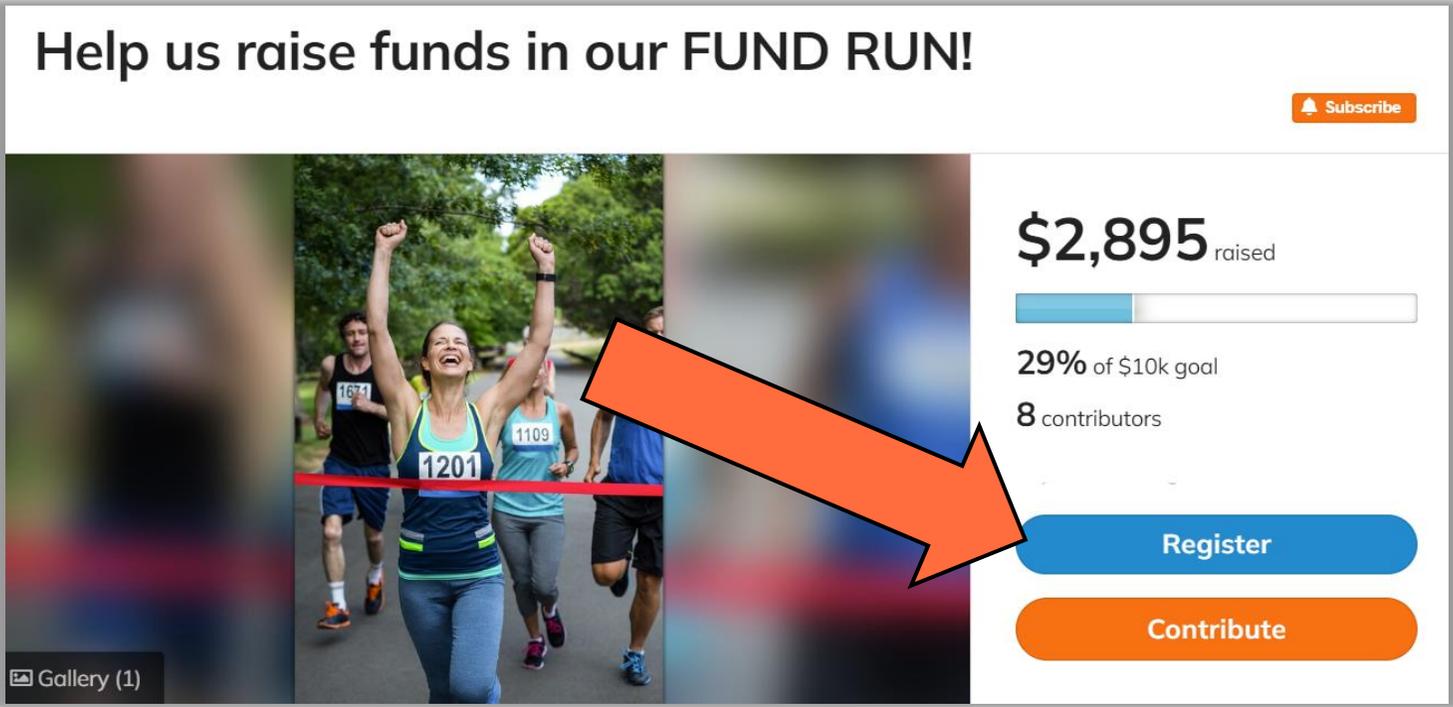
Important attributes:

- All funds raised from sub-campaigns roll up into the main campaign total.
- Sub-campaign owners have certain permissions to view and edit back-end information on their own sub-campaign only.
- Leaderboards show all fundraisers on main campaign.
- Only two tiers - you cannot have a sub-campaign of a sub-campaign.



Fundraising process:

STEP 1 - Those wishing to participate register via the main campaign (fills out forms, signs waiver/ pays fees if applicable, etc.)



The screenshot shows a fundraising campaign page titled "Help us raise funds in our FUND RUN!". The page features a central image of a woman with bib number 1201 celebrating at a race finish line. To the right of the image, the campaign progress is displayed: "\$2,895 raised" with a progress bar, "29% of \$10k goal", and "8 contributors". At the top right, there is a "Subscribe" button. At the bottom, there are two prominent buttons: a blue "Register" button and an orange "Contribute" button. A large orange arrow points from the "Register" button towards the center of the page.

Help us raise funds in our FUND RUN!

Subscribe

\$2,895 raised

29% of \$10k goal

8 contributors

Register

Contribute

Gallery (1)

Fundraising process:

STEP 2 - Fundraisers receive their sub-campaign

Team Polar Bear is walking for FundRazr Foundation!

[Subscribe](#)



\$0 raised

0% of \$1k goal

0 contributors

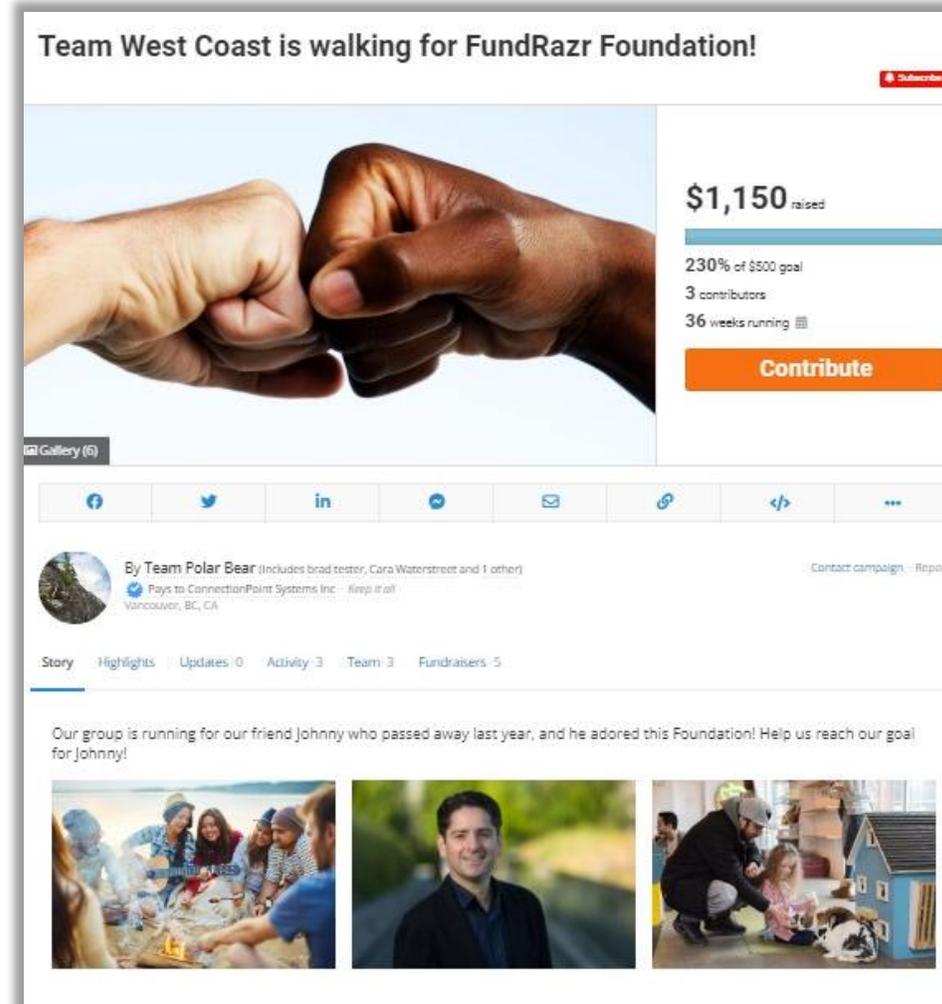
— days left

Not launched

Gallery (5)

Fundraising process:

STEP 3 - Fundraisers personalize and promote their sub-campaigns, then receive contributions



The screenshot shows a FundRazr fundraising page for "Team West Coast is walking for FundRazr Foundation!". The page features a large image of two hands shaking, symbolizing partnership or agreement. On the right side, there is a progress bar showing that \$1,150 has been raised, which is 230% of the \$500 goal. There are 3 contributors and the campaign has been running for 36 weeks. A prominent orange "Contribute" button is visible. Below the main image, there is a social media sharing bar with icons for Facebook, Twitter, LinkedIn, Messenger, Email, and Print. The page is created by "Team Polar Bear" (including Brad Tester, Cara Waterstreet, and 1 other), who has paid to ConnectionPoint Systems Inc. in Vancouver, BC, CA. The page includes a navigation menu with options for Story, Highlights, Updates (0), Activity (3), Team (3), and Fundraisers (5). The main text reads: "Our group is running for our friend Johnny who passed away last year, and he adored this Foundation! Help us reach our goal for Johnny!". Below the text are three small images: a group of people gathered around a table, a portrait of a man, and a person interacting with a child.

Fundraising process:

STEP 4 - Fundraisers update campaigns and attend event (if applicable).



The following instructions with examples are shown on FundRazr, but everything works the same for all three platforms

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Creating Your Peer-to-Peer Campaign

Creating Your Peer-to-Peer Campaign

1. Click 'Get started' button (or similar or other platforms)

The screenshot displays the FundRazr website interface. At the top left is the FundRazr logo. Navigation links include 'For Professionals', 'For Personal', and 'How It Works'. On the right, there are links for 'About', 'Blog', and 'Help'. A prominent orange button labeled 'Get started free' with a right-pointing arrow is highlighted by a large orange arrow pointing from the right. The main content area features a campaign titled 'A community owned agriculture space for Parkdale' by the Greenest City Environmental Organization. The campaign shows '\$25,638 raised' and '103% of \$20K Goal'. A 'Contribute' button is visible. Below the campaign details are four donation options: 'Squash Patch (3 sq. yards) \$15 USD', 'Cabbage (1 sq. foot) \$10 USD', 'Row of beets (1 yard) \$30 USD', and 'Bean Patch (1 sq. yard) \$105 USD'. A 'Goal Achieved!' badge is also present on the campaign image.

Creating Your Peer-to-Peer Campaign

***NOTE: Only organizations may use the peer-to-peer layout**

The screenshot shows a campaign creation interface with a progress bar at the top containing steps: Begin, Type, Story, Details, Funding, Review, and Launch. A 'Preview' button is located in the top right corner. Below the progress bar, a message reads: "You're just a few steps away from raising money for your project. Shan, join the 200,000+ campaign creators from more than 100 countries who have raised over \$250 million on ConnectionPoint Platforms."

The interface includes several form fields:

- Add a title:** A text input field with a character count of 0 / 80. Below the field is the text: "Give your campaign a title that inspires. [Tips](#)".
- Category:** A dropdown menu with the text "Categories help people find your campaign." and a placeholder "Select from ...".
- Who is the money for?:** A section with two options. The first option, "The money is for you, a friend, a member, or a friend.", is currently selected and has a grey background. The second option, "An organization", is highlighted with a white background and a blue border. A large orange arrow points from the first option to the second. The text for the "An organization" option reads: "The money is for a non-profit, business, group, or other organization you're authorized to represent."

Creating Your Peer-to-Peer Campaign

2. Click Content → Layout, then choose the “Peer-to-peer” layout

The image shows a screenshot of a campaign management interface. On the left, a sidebar menu is open to the 'Layout' option, which is highlighted with a large orange arrow. The main content area displays a preview of a campaign titled 'Help our FUND Run!' with a 'Layout' modal window overlaid on top. The modal window shows a grid of layout options. The 'Peer-to-peer event' layout is selected and highlighted with a blue background and an orange arrow. Below the layout options, there are four columns of text describing the features and target audience for each layout. The 'Peer-to-peer event' layout is described as being optimized for peer fundraising and featuring event registration and a leaderboard of peer fundraisers.

Account Campaigns Organizations Enterprise

Help our FUND Run!
by Our Organization
DRAFT CLONE

View campaign

Tasks 29

MANAGE

Visual editor

Content

Story

Tabs

Cover image & video

Layout

Rewards

Settings

Team

Registration (on)

Sub-campaigns (on)

ENGAGE

Wondering what to do next, Shan?
We've got you covered. The path to fundraising success is laid out in your [Tasks list](#).

Help our FUND Run!

Layout

Preview changes Cancel Save

Requires Rewards

Requires Rewards

Requires Rewards

Requires Rewards

Donation form

Peer-to-peer event

Microprojects with leaderboard

Who it's for: Organizations that want a simple form for donations.

Who it's for: Organizations running a fundraising event.

Who it's for: Organizations that want to leverage user-defined (DIY) campaigns.

Who it's for: Organizations that want a template for future campaigns.

Notable features: Consists of the campaign story and a payment form. Works with or without rewards. Other campaign features are hidden.

Notable features: Optimized for peer fundraising. The campaign story, event registration, and a leaderboard of peer fundraisers are prominent.

Notable features: Optimized for peer fundraising. The campaign story, campaign registration, and related DIY campaigns are prominent.

Notable features: Uses sub-campaigns for quick and easy setup of future campaigns. Includes a leaderboard of fundraisers.

Setting Up Your Peer-to-Peer Campaign

Part 1: Main campaign set-up

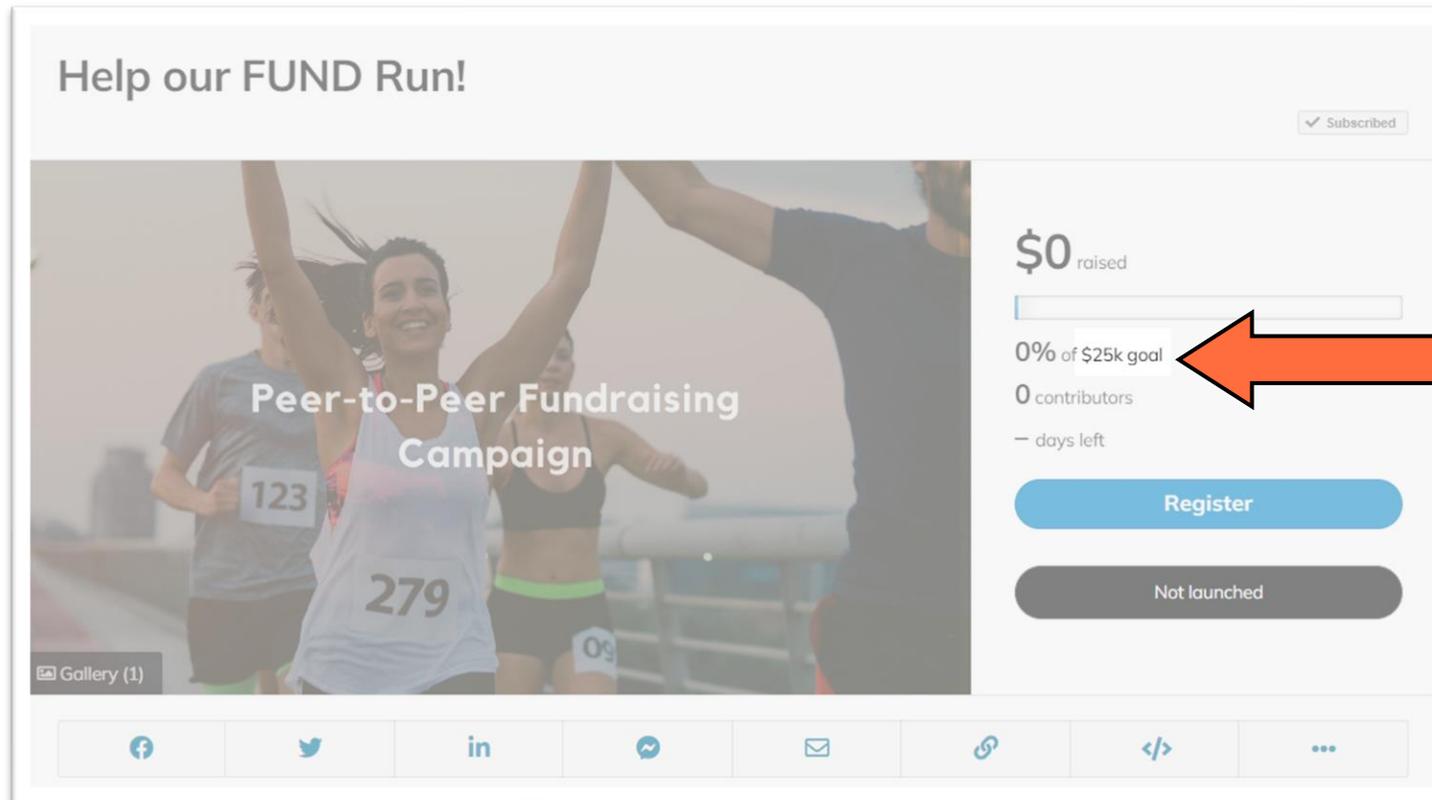
Main Campaign Set-Up

Note: Your main campaign is the only one with a 'Register' button

The screenshot shows a fundraising campaign interface. At the top left, the text reads "Help our FUND Run!". In the top right corner, there is a "Subscribed" button with a checkmark. The main visual is a photograph of three runners during a race, with the text "Peer-to-Peer Fundraising Campaign" overlaid. Below the photo, on the left, is a "Gallery (1)" link. On the right side of the page, the following statistics are displayed: "\$0 raised", "0 contributors", and "— days left". A prominent blue "Register" button is circled in orange, and below it is a black "Not launched" button. At the bottom of the page, there is a row of social media sharing icons: Facebook, Twitter, LinkedIn, Messenger, Email, Print, Code, and a menu icon.

Main Campaign Set-Up

1. Set or edit goal - the overall monetary target for the entire campaign and event. All other goals (sub-campaign & team member) roll up into this amount.



The screenshot displays a fundraising campaign interface. At the top, it says "Help our FUND Run!" with a "Subscribed" button. The main image shows runners with the text "Peer-to-Peer Fundraising Campaign". On the right, the progress shows "\$0 raised", "0% of \$25k goal", "0 contributors", and "— days left". A large orange arrow points to the "0% of \$25k goal" text. Below this are "Register" and "Not launched" buttons. At the bottom, there is a social media sharing bar with icons for Facebook, Twitter, LinkedIn, Messenger, Email, Print, Code, and a menu icon.

TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/how-to-set-and-change-the-campaign-goal/>

Main Campaign Set-Up

2. Write your main campaign story



The screenshot shows the Facebook profile page for ConnectionPoint Systems Inc. The profile header includes the company name, location (Vancouver, BC, CA), and a verified organization badge. Below the header is a navigation menu with tabs for Story, Campaigns (5), Highlights, Updates (1), and Activity (8). An orange arrow points to the 'Story' tab. The main content area displays a campaign story with the headline "There is no greater power on this Earth than the story...". The story features two images: a woman kissing a baby and a bride holding a gift. Below the images are two columns of placeholder text. At the bottom of the page, there are sections titled "What's the problem?" and "What's our solution?" with corresponding placeholder text.

By ConnectionPoint Systems Inc • Manage
Verified organization · Keep it all
Vancouver, BC, CA

Story Campaigns 5 Highlights Updates 1 Activity 8

There is no greater power on this Earth than the story...



Consequatur unde eligendi quis mollitia quidem ut. Harum debitis impedit aut cupiditate harum sed quia nihil. Voluptatem dolor cum id est voluptates ut commodi. Repudiandae et ut dolor ut deleniti vitae nobis. Minima magnam error accusamus aut et.



Nobis impedit minima eos animi repudiandae in vel. Voluptas eveniet accusantium quia quia. Nulla qui consectetur iste ea velit fugit omnis dolor. Tempora aliquam et omnis ut ut. Et nam laborum at sint fugit.

What's the problem?

Nobis impedit minima eos animi repudiandae in vel. Voluptas eveniet accusantium quia quia. Nulla qui consectetur iste ea velit fugit omnis dolor. Tempora aliquam et omnis ut ut. Et nam laborum at sint fugit.

What's our solution?

Impedit enim reprehenderit sit excentur et apperatur. Deum vel et quis maiores reiciendis dolore. Hinc cum fugit minus. Tempor aut sit utiam et

Main Campaign Set-Up

2. Write your main campaign story

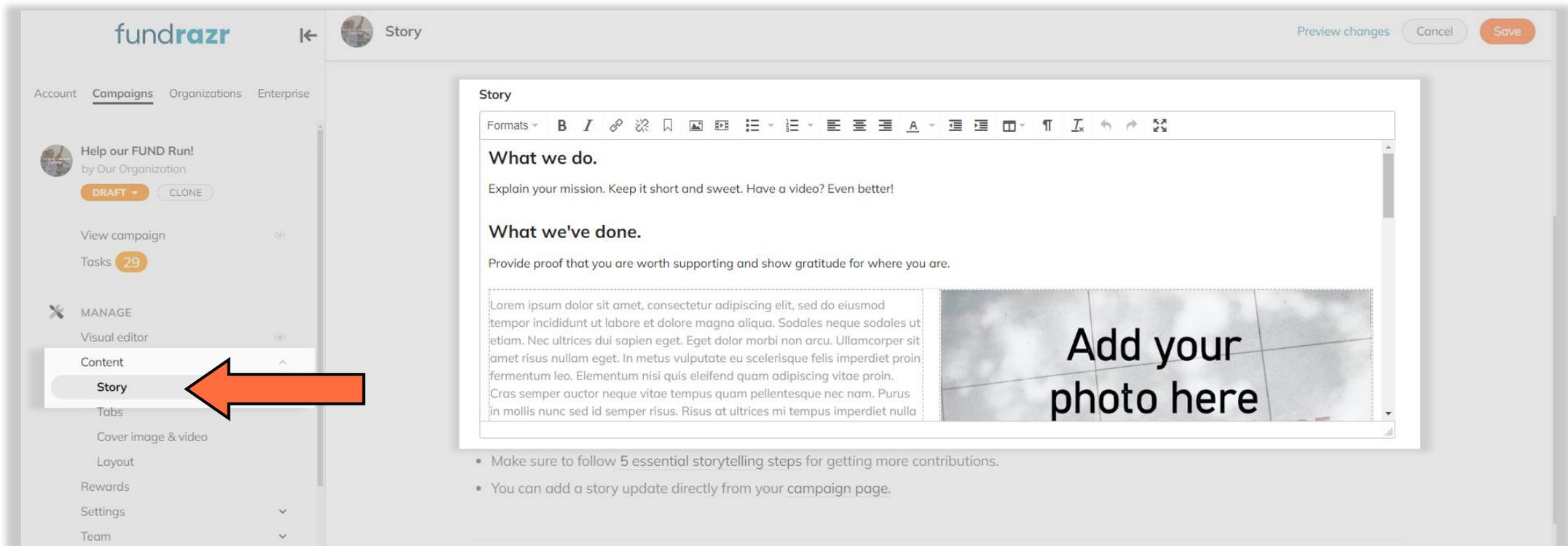
Your main campaign story is speaking to *your participants*.

They want to know:

- Event details
- Registration information (How to register, expectations for fundraising, reward info, any specific applicable information)
- Traditional campaign story (except it becomes more 'why should I fundraise for you' rather than 'why should I donate to you')

Main Campaign Set-Up

2. Write your main campaign story



TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/navigating-the-story-editor/>

STORY WRITING TIPS: <https://connectionpoint.com/fundraiserhub/the-art-of-campaign-storytelling/>

Main Campaign Set-Up

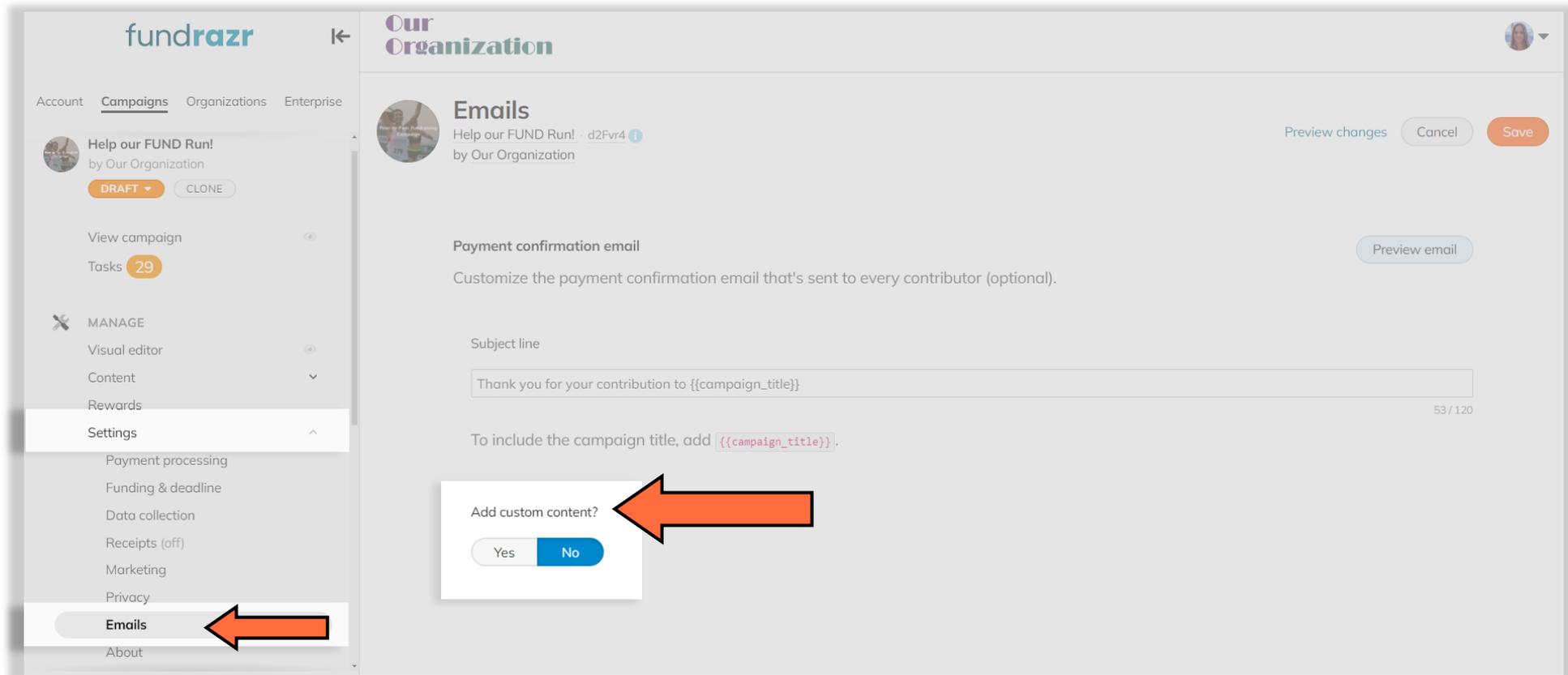
3. Insert your main campaign cover photo and video.

The screenshot displays a campaign setup interface. At the top, the text "Help our FUND Run!" is visible, along with a "Subscribed" button. Below this is a gallery of images, with one image highlighted by an orange border. The highlighted image shows three runners at a race, with the text "Peer-to-Peer Fundraising Campaign" overlaid. To the right of the gallery, the campaign statistics are shown: "\$0 raised", "0 contributors", and "— days left". Below the statistics are two buttons: "Register" (blue) and "Not launched" (black). At the bottom of the interface is a row of social media sharing icons: Facebook, Twitter, LinkedIn, Messenger, Email, Print, and a menu icon.

TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/all-about-your-media-gallery/>

Main Campaign Set-Up

4. Customize the confirmation email.

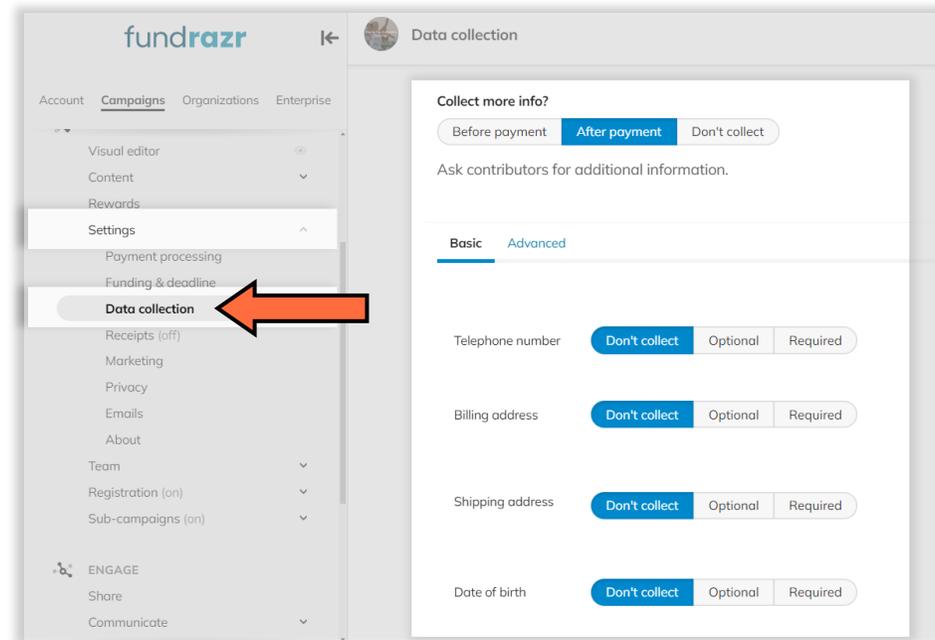


TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/how-to-customize-the-thank-you-email-to-your-supporters/>

Main Campaign Set-Up

5. Choose information to collect from supporters

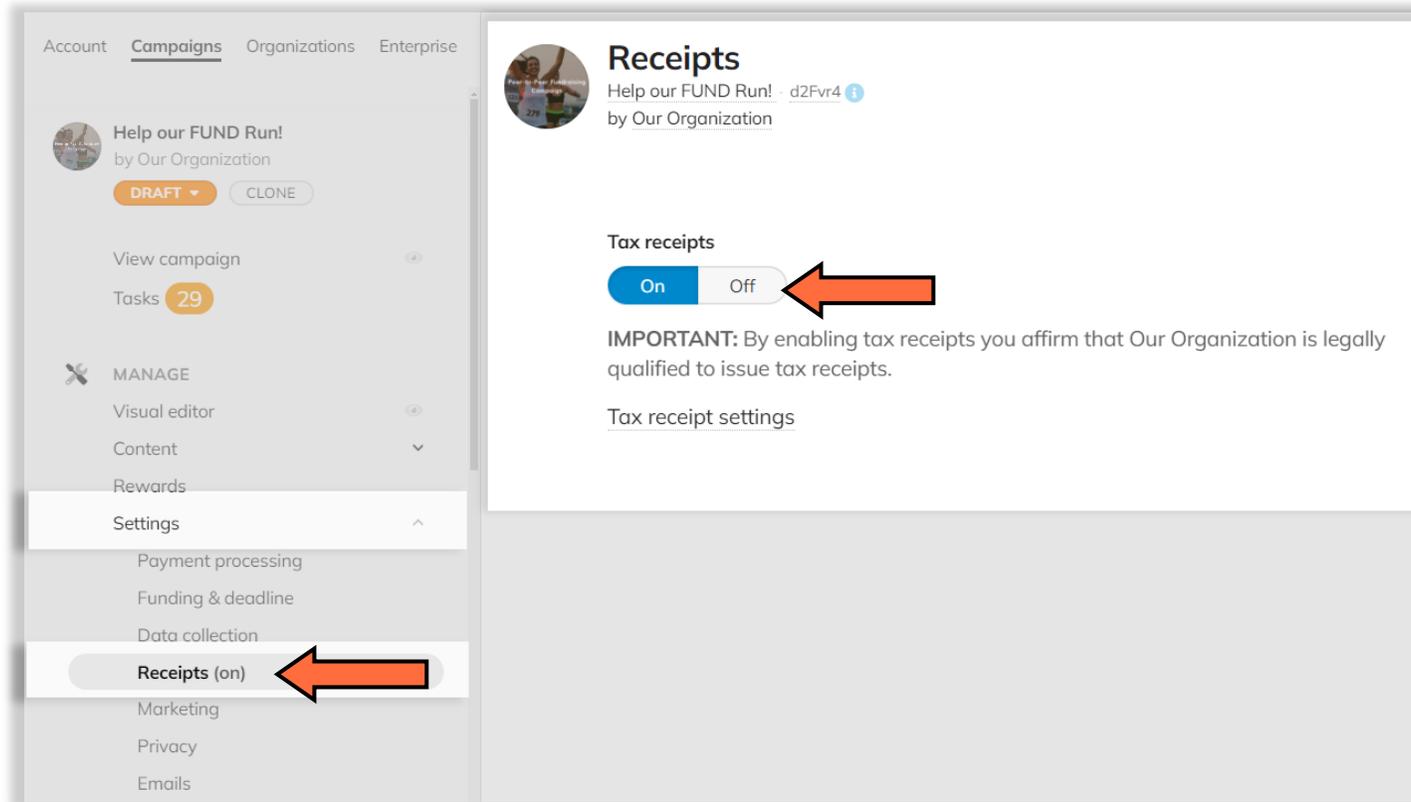
- All CPSI platforms collect names and email addresses from all supporters (and street addresses if tax receipting is turned on)
- If you require additional information, set it up in the 'Data collection' tab of the Edit menu



TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/how-do-i-choose-the-information-i-collect-from-a-supporter/>

Main Campaign Set-Up

6. Turn on your campaign tax receipts (if applicable)



Note: The platform will ask supporters for street addresses automatically if tax receipts are turned on.

Setting Up Your Peer-to-Peer Campaign

Part 2: Sub-campaign set-up

Sub-Campaign Set-Up

Note: Sub-campaigns do NOT have a 'Register' button, and contains the label 'Sub-campaign of [main campaign title]' if viewing through the Visual Editor

The screenshot displays the FundRazr Visual Editor interface for a sub-campaign. On the left, a navigation sidebar includes sections for Account, Campaigns, Organizations, and Enterprise. The 'Visual editor' option is highlighted under the 'MANAGE' section. The main content area shows a campaign card for 'Team Giraffe is raising funds for our event!' by 'Our Organization'. A yellow banner at the top of the main area states: 'The main campaign administrator hasn't launched their campaign yet. You can launch your campaign after the main campaign is launched.' The campaign card features a title, a subtitle 'Sub-campaign of Help our FUND Run! by Our Organization', a 'Subscribed' button, a progress bar showing '\$0 raised' (0% of a \$500 goal), and a 'Not launched' button. A large orange arrow points to the subtitle text, and another orange arrow points to the 'Visual editor' option in the sidebar.

Sub-Campaign Set-Up

1. **Set sub-campaign goal** – the target for a specific sub-campaign (whether team or individual)

Team Giraffe is raising funds for our event!

✓ Subscribed



\$0 raised

0% of \$500 goal ←

0 contributors

– days left

Not launched

Gallery (3)

The image shows a fundraising page for 'Team Giraffe'. The main heading is 'Team Giraffe is raising funds for our event!'. Below the heading is a photo of a giraffe eating leaves from a tree. To the right of the photo, there is a progress bar showing '\$0 raised' and '0% of \$500 goal'. A red arrow points to the '0% of \$500 goal' text. Below the progress bar, it says '0 contributors' and '– days left'. At the bottom of the fundraising section, there is a dark button that says 'Not launched'. In the bottom left corner of the page, there is a 'Gallery (3)' link.

Sub-Campaign Set-Up

1. Set sub-campaign goal – done on the [main campaign](#)

fundrazr Sub-campaign settings

Account **Campaigns** Organizations Enterprise

Help our FUND Run!
by Our Organization
DRAFT CLONE

View campaign
Tasks 29

MANAGE

Visual editor
Content
Rewards
Settings
Team
Registration (on)
Sub-campaigns (on)

All sub-campaigns (1)
Sub-campaign settings
Sub-campaign content
Team settings
Create

Sub-campaign goal

Static Dynamic

- **Static**—You specify the sub-campaign goal (default).
- **Dynamic**—The sub-campaign goal is calculated automatically by multiplying the number of campaign team members by the *Team member goal* (currently not set).

Static goal amount

\$.00

For best results, enter an amount greater than the *Team member goal* (currently not set).

Sub-campaign stats

Show Hide Inherit setting from main

Lock the setting on sub-campaigns

- If shown, the sub-campaign stats appear prominently on the sub-campaign.
- Depending on other settings, the stats can include the current total amount contributed, the sub-campaign goal, a progress meter, the number of contributors, and deadline information.
- The main campaign stats setting is located in the main campaign's *Funding & deadline* tab.

Hiding the stats can reduce the amount of money you raise.

Sub-Campaign Set-Up

1. Set sub-campaign goal – static vs dynamic

Sub-campaign goal

Static Dynamic

- **Static**—You specify the sub-campaign goal (default).
- **Dynamic**—The sub-campaign goal is calculated automatically by multiplying the number of campaign team members by the *Team member goal* (currently not set).

Static goal amount

\$.00

For best results, enter an amount greater than the *Team member goal* (currently not set).

Sub-campaign goal

Static Dynamic

- **Static**—You specify the sub-campaign goal (default).
- **Dynamic**—The sub-campaign goal is calculated automatically by multiplying the number of campaign team members by the *Team member goal* (currently not set).

Lock the dynamic goal ?

- If you are NOT allowing teams, all sub-campaign goals should be the same: the amount that must be raised to participate in the event and static vs dynamic is NOT applicable.
- Locking means the participant CANNOT CHANGE the sub-campaign goal. You can decide whether you want this feature or not.
- If you ARE allowing teams, then you may wish to select 'Dynamic' (dynamic = team member goal x number of team members). **Locking is recommended.**

TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/how-to-set-or-edit-the-sub-campaign-goal/>

Sub-Campaign Set-Up

2. Write your sub-campaign story

The screenshot shows a sub-campaign page for 'Team Polar Bear'. At the top left is a profile picture of a polar bear. To its right, the text reads 'By Team Polar Bear', followed by a gear icon, 'Pays to ConnectionPoint Systems Inc · Keep it all', and 'Vancouver, BC, CA'. Below this is a navigation bar with 'Story' (underlined), 'Updates · 0', 'Activity · 0', and 'Fundraisers · 1'. A yellow notification bar contains the text 'Shannon, you should add a story to your campaign.' with a pencil icon on the right. The main content area features the text 'Thank you for supporting our cause!' above a blue hand icon holding a red heart. Below this is a paragraph of placeholder text: 'Debitis et nihil dolores sunt rem placeat aut. Provident omnis aut officiis ea veniam fugit maiores eum. Est et minima explicabo. Quos recusandae commodi et tenetur. Sit quos consequatur doloribus eum et omnis voluptate eos. Natus praesentium est dolorem aperiam. Voluptatum nobis earum doloremque qui at. Molestias quos quaerat laudantium ipsam iste rem.' and a blue link 'Click here for more info on our organization'.

Participant/Team story
(Participants & Teams can always add to their part of the story)

Sub-campaign story
(Set by organization and unchangeable by participant)

Sub-Campaign Set-Up

2. Write your sub-campaign story

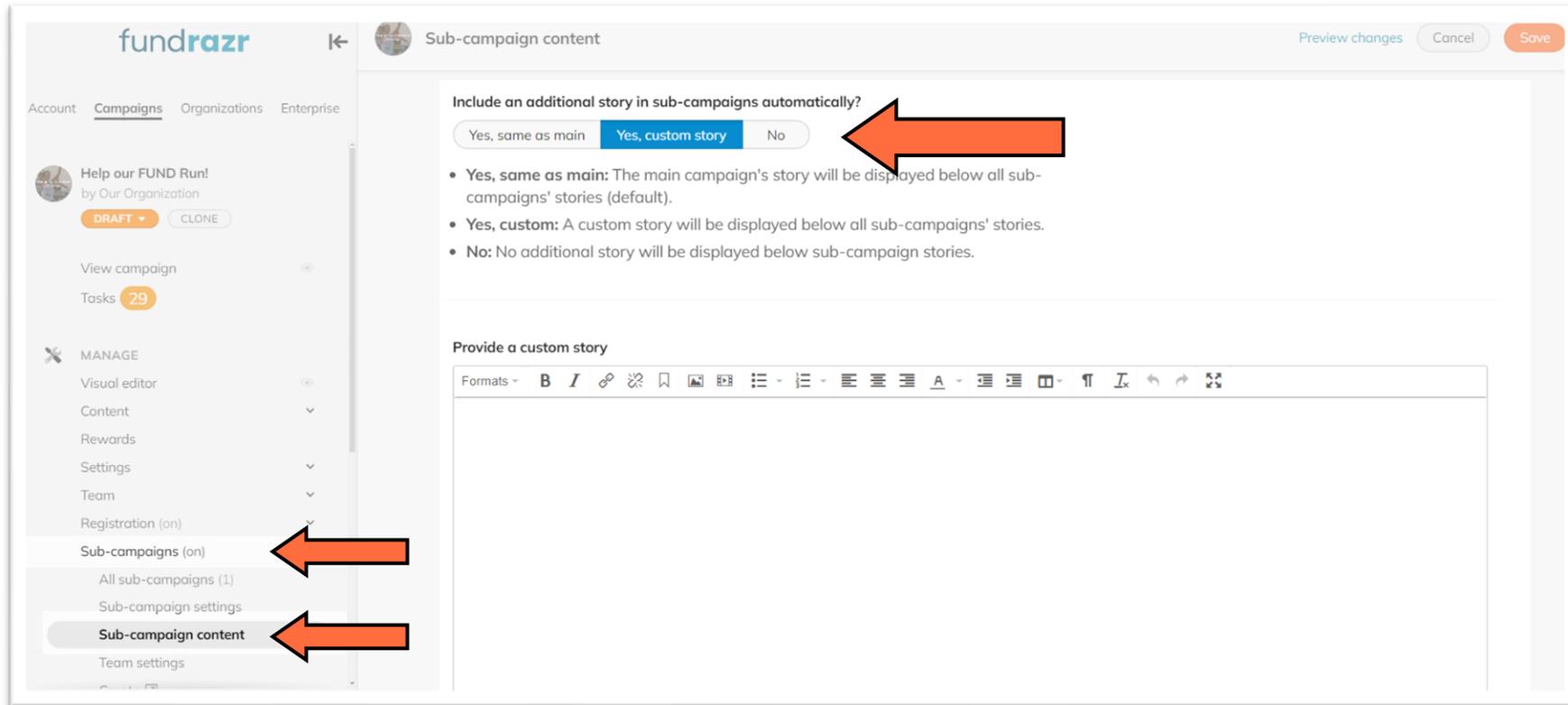
Your sub-campaign story is speaking to ***your donors***.

They want to know about the campaign itself and what they are helping to accomplish. This should be like any standard campaign. This article guides you through writing a fundraising campaign story:

<https://connectionpoint.com/fundraiserhub/the-art-of-campaign-storytelling/>

Sub-Campaign Set-Up

2. Write your sub-campaign story



TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/sub-campaign-stories-setting-and-editing-a-story-template/>

Sub-Campaign Set-Up

3. Set your sub-campaign title template

Team Polar Bear is walking for FundRazr Foundation! 

[Subscribe](#)



Gallery (5)

\$0 raised

0% of \$1k goal

0 contributors

— days left

Not launched

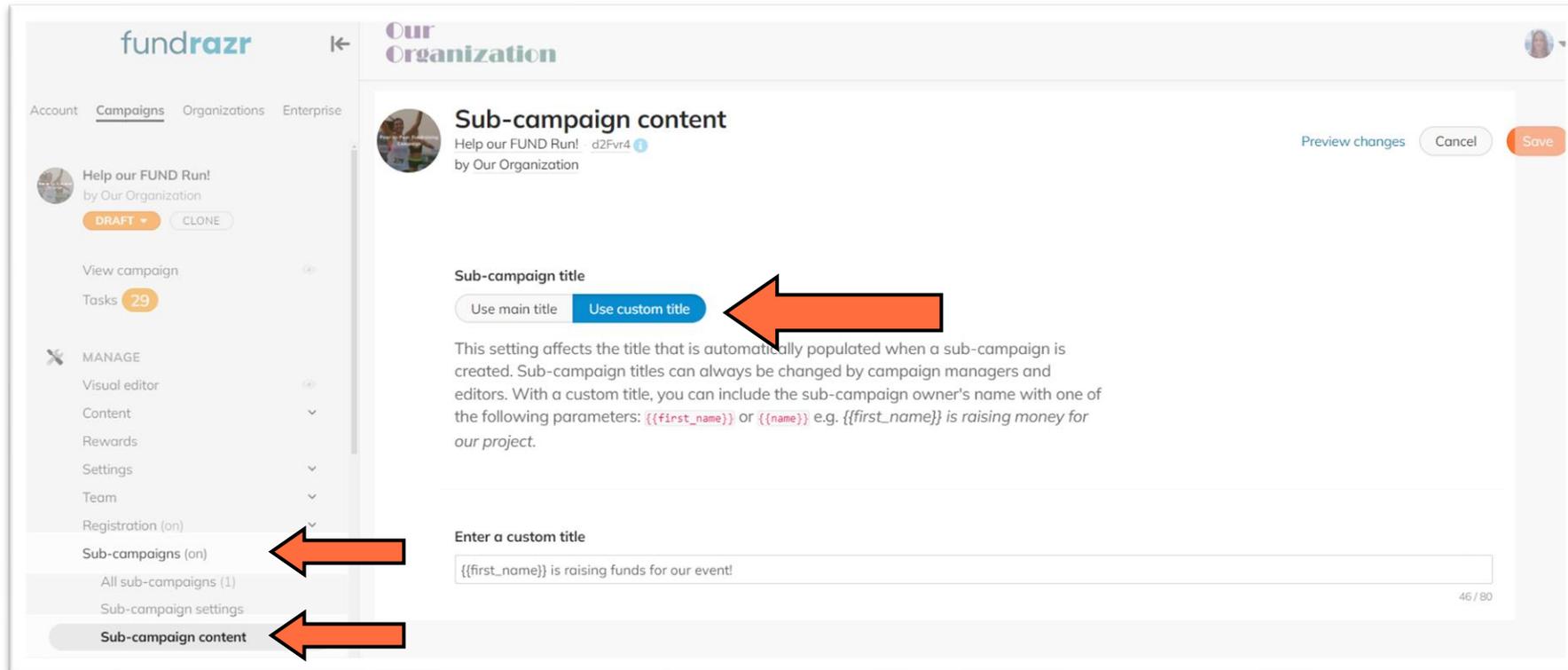
[f](#) [t](#) [in](#) [m](#) [e](#) [l](#) [c](#) [/](#) [>](#) [...](#)

 By Team Polar Bear
Pays to ConnectionPoint Systems Inc · Keep it all
Vancouver, BC, CA

[Contact campaign](#) · [Report](#)

Sub-Campaign Set-Up

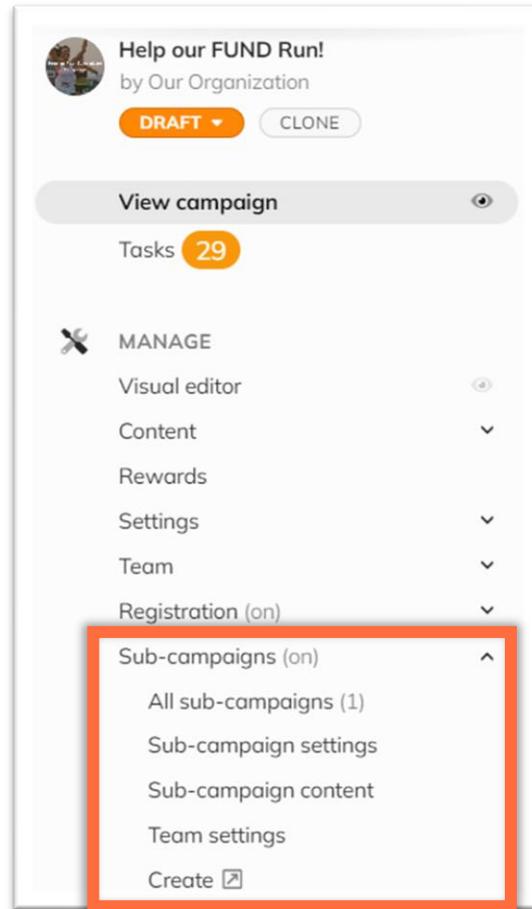
3. Set your sub-campaign title template



TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/how-to-set-a-sub-campaign-title-template/>

Sub-Campaign Set-Up

4. Explore the sub-campaign menus and options



Registration

Part 1: Registration flow

Registration

Standard registration flow (no customization)

The screenshot shows a fundraising campaign page titled "Help our FUND Run!". The main visual is a photo of runners with the text "Peer-to-Peer Fundraising Campaign" overlaid. On the right, statistics show "\$0 raised", "0 contributors", and "— days left". A blue "Register" button is circled in orange, and a black "Not launched" button is below it. A "Subscribed" button is in the top right. A social sharing bar is at the bottom.

Help our FUND Run!

Subscribed

Peer-to-Peer Fundraising Campaign

\$0 raised

0 contributors

— days left

Register

Not launched

Gallery (1)

f t in m e l </> ...

Registration

Standard registration flow (no customization)

**When dedicated people get behind a cause, great things can happen.
That's why we need you.**

Please join our social fundraising campaign with one of the options below. Then share your belief in our cause with your friends on Social Media and email. It's quick and easy and all funds go securely to [Our Organization](#).

With your help, we can make great things happen for the cause we believe in.

Register as an individual
Sign up and personalize your campaign.

----- or -----

Join a team
Pick a team from the list, or search by name for teams or friends.

Choose a team

----- or -----

Create your own team
Sign up your own team, personalize your campaign, and invite your friends.

Give your team a name

[Back to campaign](#)

Step 1 – Choose individual or campaign team

Registration

Standard registration flow (no customization)

Your personal message

Tell people why our cause matters to you. Short messages and videos by supporters like you are one of our most effective fundraising tools. Add one or both and you'll help us raise more money. *Easy, effective, optional.*

0 / 1000

[Record video](#) · [Upload video](#)

Your personal goal

Set a personal fundraising goal of \$0 or more. Your personal goal helps your team raise more money.

\$.00
----	--	-----

[Back](#) [Continue](#)

Step 2 – Write/record a message and choose a goal

Registration

Standard registration flow (no customization)

 **Welcome aboard!**

Your fundraising page has been created. Check it out now.

[View your page](#)

Step 3: All done! The fundraiser can now view their fundraising page!

Registration

Part 2: Individuals vs teams

Individuals vs Teams

What are the differences?

Individual campaigns

- Single fundraiser with one sub-campaign
- Aiming for their own sub-campaign goal (which matches their personal goal)
- All funds raised are attributed to that fundraiser

Team campaigns

- Two or more fundraiser share ONE sub-campaign with ONE sub-campaign goal
- Team members each have a personal goal and funds raised can still be attributed to each individual fundraiser
- All funds accumulate toward collective sub-campaign total
- Story tabs include a 'Team' tab, which shows **that team sub-campaign's** team members and how much each has raised

Individuals vs Teams



By Battle of the Breweries (Includes Nicolas Hockenberry, Kelly Hueneke and 3 others)
Pays to United Way of Dubuque Area Tri-States - *Keep it all!*
Dubuque, IA, US

[Contact campaign](#) [Report](#)

[Story](#) [Highlights](#) [Updates](#) 0 [Activity](#) 28 [Team](#) 5

Meet the team

[?](#) Do you believe in our cause? [Join our team!](#)

[List](#) | [Leaderboard](#)



Andrea Burds
\$75 raised from 1 contribution toward a goal of \$3,000
I'm going over the edge to raise awareness in our own community. I hope to raise money to help improve the quality of life for the people in Dubuque county. Often times people think you have to travel far away to help those in need, when in reality there are people right outside your door who are looking for our help. Let's make a difference in our hometown!



Devin Quade
\$1,030 raised from 2 contributions toward a goal of \$3,000



Kelly Hueneke
\$420 raised from 8 contributions toward a goal of \$3,000



Nicolas Hockenberry
\$1,420 raised from 12 contributions toward a goal of \$3,000
Appreciate the work the United Way does to support this region's human service programs and community needs. Happy to jump out on the edge to help support the causal

Individuals vs Teams

Choose what to allow

The screenshot displays the Fundrazr registration settings page. The left sidebar contains a navigation menu with the following items: Account, Campaigns, Organizations, Enterprise, Help our FUND Run! by Our Organization (DRAFT, CLONE), View campaign, Tasks (29), MANAGE, Visual editor, Content, Rewards, Settings, Team, Registration (on), **Registration settings** (highlighted with an orange arrow), Header, Form, Compliance, Confirmation, and Fees & rewards. The main content area is titled 'Registration settings' and includes a lock icon with the text 'Locked by the Peer-to-peer event layout.' Below this, the 'Optimize registration for' section has three radio buttons: 'Individuals', 'Teams', and 'Both' (selected, indicated by an orange arrow). A 'Compare' table is shown below:

Option	Description
Individuals	Provides a registration process for individual supporters.
Teams	Encourages supporters to create or join a fundraising team.
Both	Provides both options above.

At the bottom of the page, there is a toggle for 'Show Registration button on the main campaign?' with 'Yes' selected.

Individuals vs Teams

Team member goals – each individual fundraiser's person target

Story Highlights Updates 0 Activity 28 **Team 5** Fundraisers 29

Meet the team

Do you believe in our cause? [Join our team!](#)

List | **Leaderboard**

- **Andrea Burds**
\$75 raised from 1 contribution toward a goal of \$3,000
I'm going over the edge to raise awareness in our own community. I hope to raise money to help improve the quality of life for the people in Dubuque county. Often times people think you have to travel far away to help those in need, when in reality there are people right outside your door who are looking for our help. Let's make a difference in our hometown!
- **Devin Quade**
\$1,030 raised from 2 contributions toward a goal of \$3,000
- **Kelly Hueneke**
\$420 raised from 8 contributions toward a goal of \$3,000
- **Nicolas Hockenberry**
\$1,420 raised from 12 contributions toward a goal of \$3,000
Appreciate the work the United Way does to support this region's human service programs and community needs. Happy to jump out on the idea to help support the event.

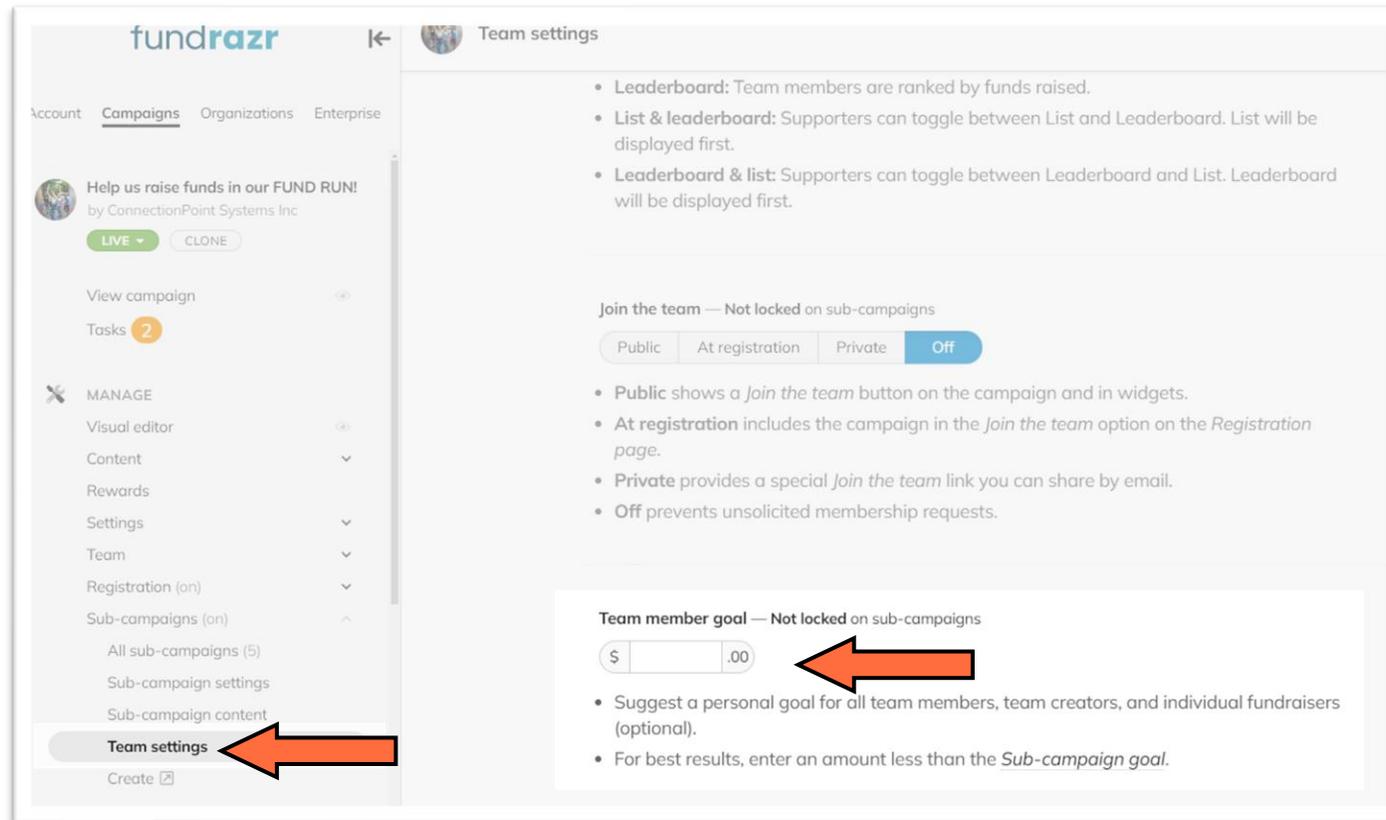
 **Brad Waterstreet** would like you to see **Team Polar Bear is walking for FundRazr Foundation!**
Help me reach my goal of \$1,000

Team Polar Bear is walking for FundRazr Found



Individuals vs Teams

Setting team member goals – not necessary if you're not allowing teams!



TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/how-to-set-or-edit-the-sub-campaign-team-member-goal/>

Registration

Part 3: Customizing the registration flow

Customizing the Registration Flow

1. Header

**When dedicated people get behind a cause, great things can happen.
That's why we need you.**

Please join our social fundraising campaign with one of the options below. Then share your belief in our cause with your friends on Social Media and email. It's quick and easy and all funds go securely to Our Organization.

With your help, we can make great things happen for the cause we believe in.

Register as an individual
Sign up and personalize your campaign.

----- or -----

Join a team
Pick a team from the list, or search by name for teams or friends.

----- or -----

Create your own team
Sign up your own team, personalize your campaign, and invite your friends.

[Back to campaign](#) Continue

Consider entering:

- Organization logo
- Fundraising expectations
- Registration fee info
- Prizes/rewards for participants

Customizing the Registration Flow

1. Header

The screenshot displays the FundRazr admin interface. On the left, a navigation sidebar includes sections for 'Account', 'Campaigns', 'Organizations', and 'Enterprise'. Under 'Campaigns', a campaign titled 'Help us raise funds in our FUND RUN!' is shown as 'LIVE'. Below this, a 'MANAGE' section lists options like 'Visual editor', 'Content', 'Rewards', 'Settings', and 'Team'. The 'Registration (on)' section is expanded, showing 'Registration settings', 'Header', 'Form', 'Compliance', 'Confirmation', 'Fees & rewards', 'Registration page', and 'Sub-campaigns (on)'. A red arrow points to the 'Header' option. The main content area is titled 'Header' and shows two radio button options: 'Default' (selected) and 'Custom'. The 'Default' option displays a preview of the registration page header content, including a headline, a sub-headline, and two paragraphs of text. The 'Custom' option shows a rich text editor with a toolbar and a blank content area.

fundrazr

Account Campaigns Organizations Enterprise

Help us raise funds in our FUND RUN!
by ConnectionPoint Systems Inc
LIVE CLONE

View campaign

Tasks 2

MANAGE

Visual editor

Content

Rewards

Settings

Team

Registration (on)

Registration settings

Header

Form

Compliance

Confirmation

Fees & rewards

Registration page

Sub-campaigns (on)

Header

Default

Show the following default content in the registration page header:

When dedicated people get behind a cause, great things can happen.
That's why we need you.

Please join one of our social fundraising teams or create a team of your own. Then share your belief in our cause with your friends on Social Media and email. It's quick and easy and all funds go securely to ConnectionPoint Systems Inc.

With your help, we can make great things happen for the cause we believe in.

Custom

Show custom content in the registration page header.

Formats B I Link Image Video Bulleted List Numbered List Text Color Background Color Bold Italic Undo Redo

Customizing the Registration Flow

2. Creating a registration form

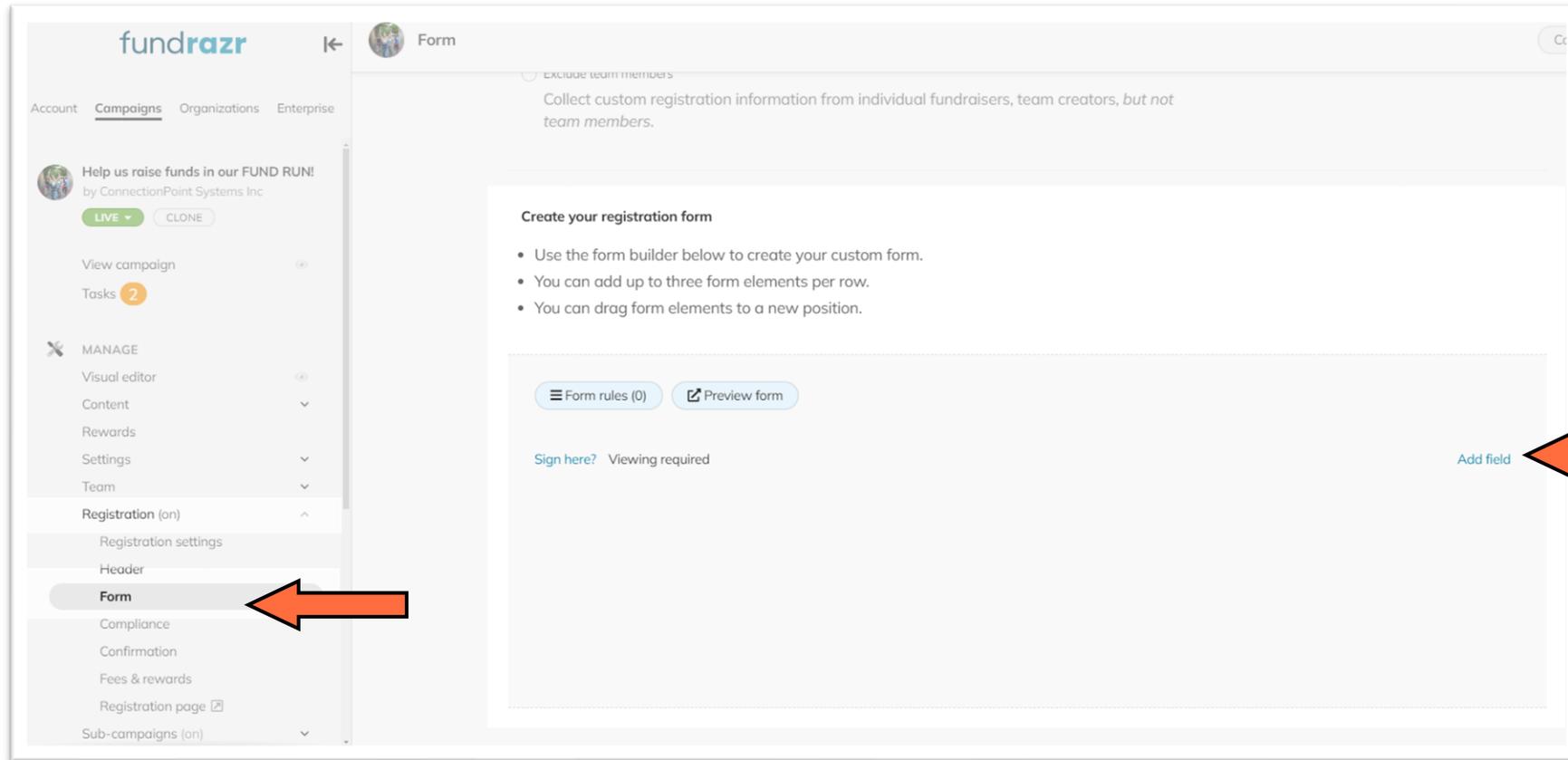
You'll have every registrant's **name** and **email address** as required by all ConnectionPoint platforms.

Request additional information by creating a **Registration Form**.

***Best practice** - do not ask for something you do not actually need. These create roadblocks and a would-be participant might change their mind if asked for too much personal information.

Customizing the Registration Flow

2. Creating a registration form

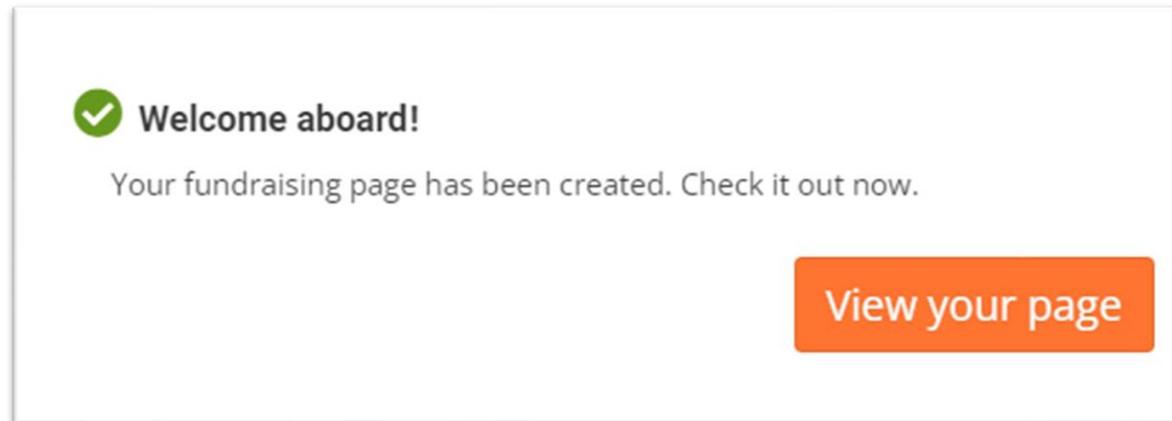


Start by clicking 'Add field'

TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/customizing-the-registration-form/>

Customizing the Registration Flow

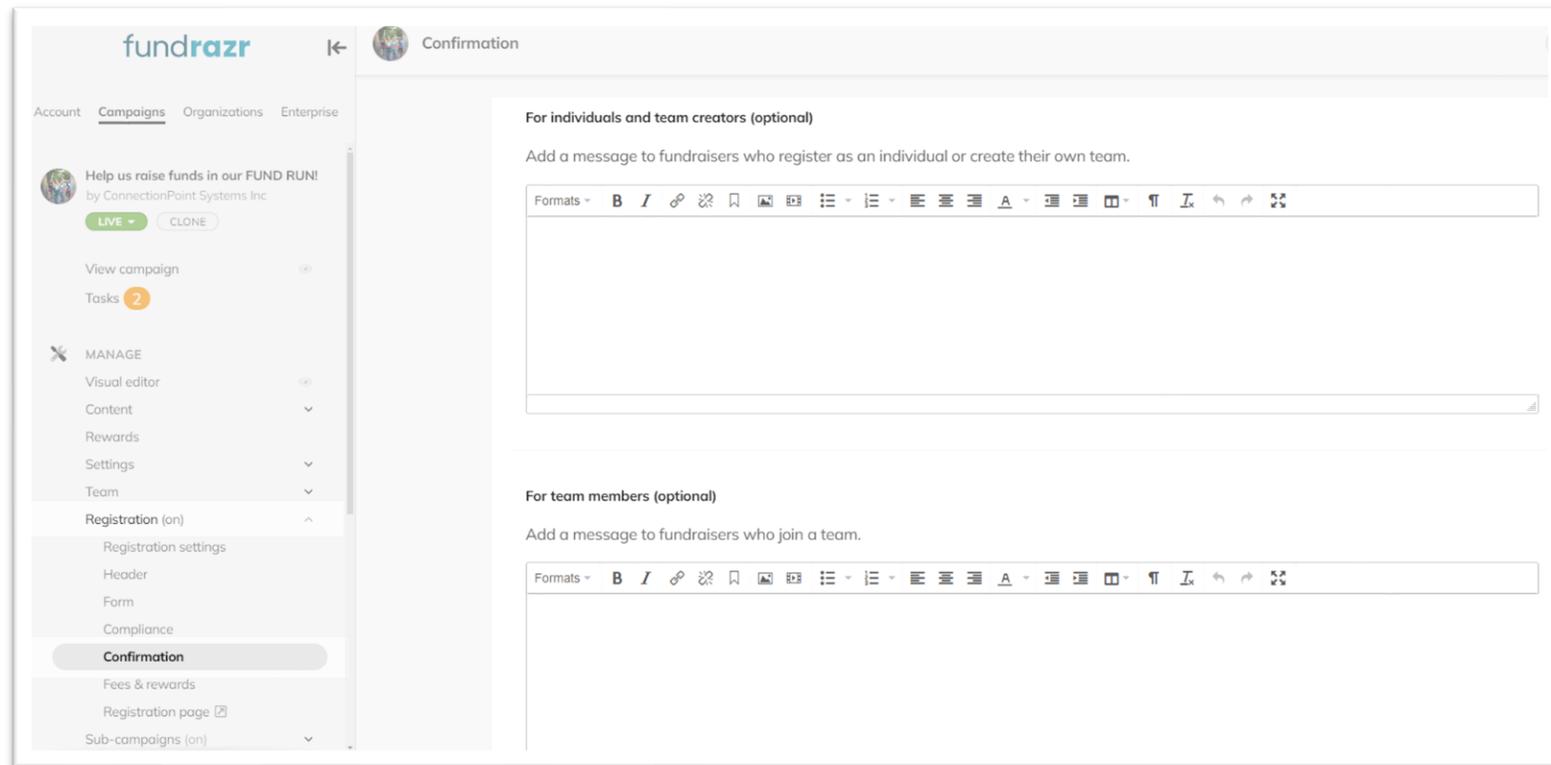
3. Customize the confirmation message



Editing isn't necessary, but you might want to include a picture of your logo, a thank you, and any other information you feel might be helpful before the participant pays their fees.

Customizing the Registration Flow

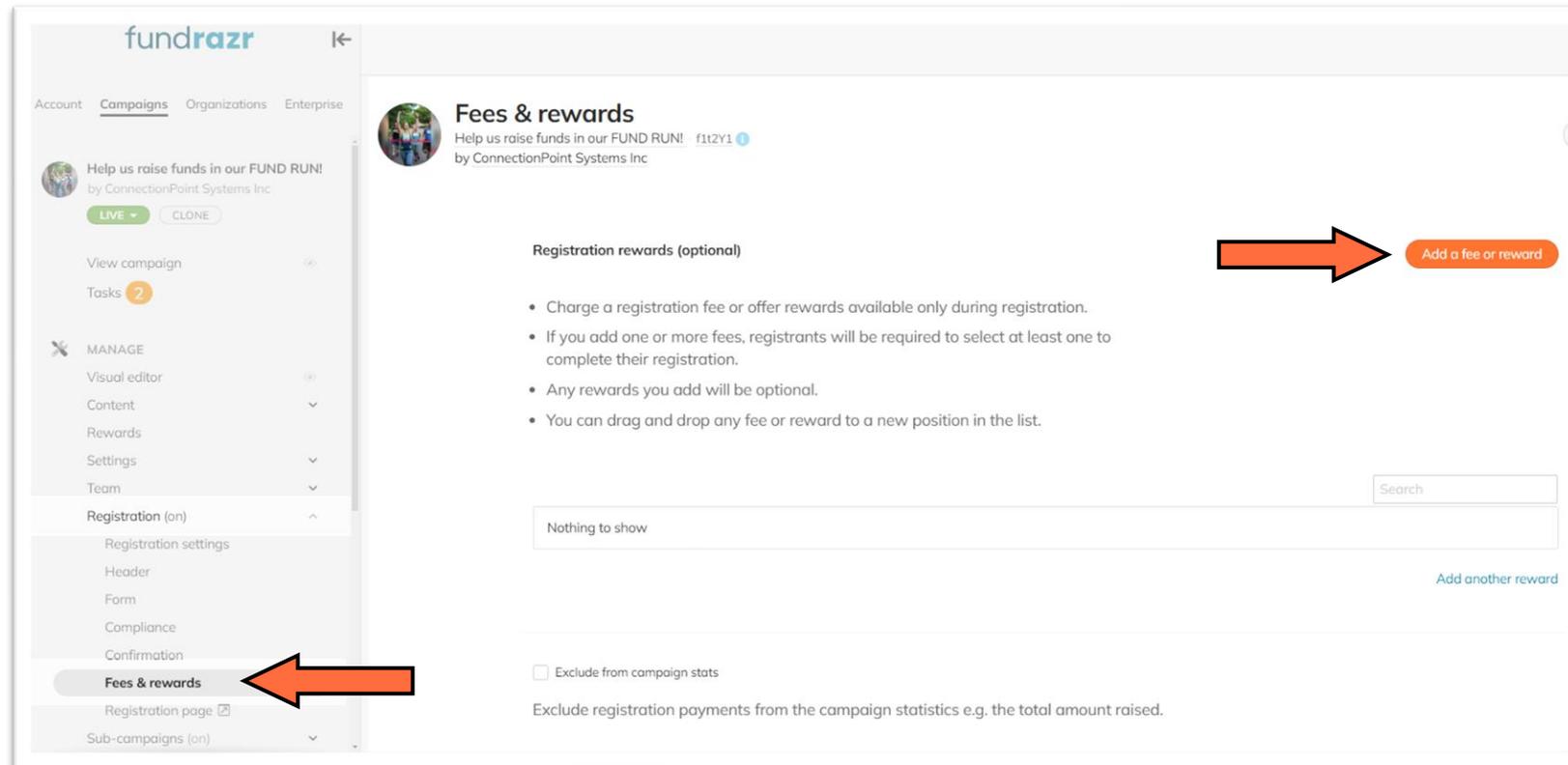
3. Customize the confirmation message



TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/what-is-the-confirmation-message-and-how-do-i-edit-it/>

Customizing the Registration Flow

4. Add a registration fee or reward



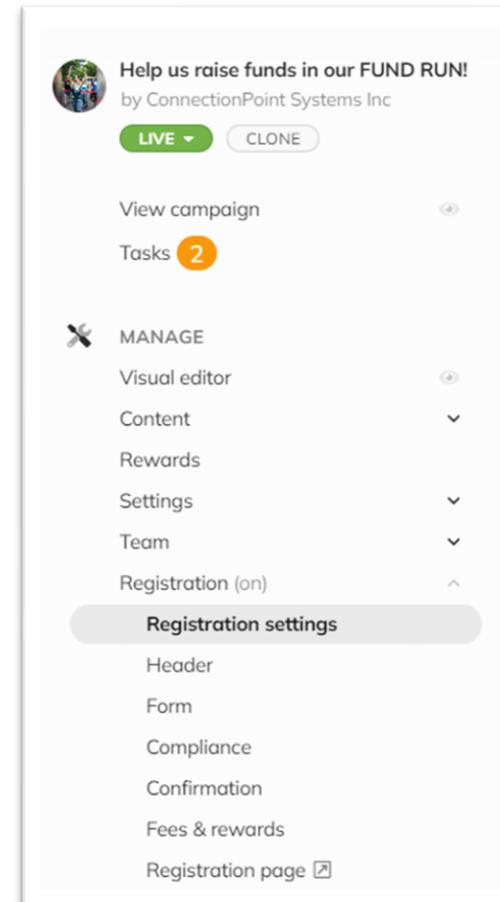
TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/registration-fees-rewards-how-to-add-edit-and-troubleshoot/>

Customizing the Registration Flow

5. Explore other options and settings

Such as:

- Requiring admin approval before sub-campaigns go live.
- Name beneficiaries to specific sub-campaigns
- Bypass registration options
- Include a waiver or compliance option
- **and so much more**



Customizing the Registration Flow

5. Explore other options and settings

<https://connectionpoint.com/help/help-category/campaign-management/>

The screenshot displays the ConnectionPoint Help Centre interface. At the top left is the logo 'connectionpoint Help Centre'. On the right side of the header are links for 'About', 'Contact', and 'Help Centre'. The main content area is a navigation menu with two columns of items. The left column includes: Campaign Sharing & Communication, Campaign Tasks, Campaign Pricing & Payments, Campaign Analytics, Campaign Privacy, Campaign FAQ, Campaign Rewards, Campaign Payment Troubleshooting, and Sub Campaigns. The right column includes: Campaign Pricing & Payments, Campaign Analytics, Campaign Privacy, Campaign FAQ, Campaign Rewards, Campaign Payment Troubleshooting, Sub Campaigns (expanded), Sub-campaign Management, Sub-campaign Content, Sub-Campaigns: Goals & Deadlines, Sub-campaign Teams, and Sub-campaigns: Registration (expanded). The 'Sub Campaigns' and 'Sub-campaigns: Registration' items are highlighted with red arrows. Below the main menu is a sidebar with categories: User Account Management (17), Payment Processing (29), For Supporters (27), Resources (6), About ConnectionPoint (4), and Talk To Us (10).

- > Campaign Sharing & Communication
- > Campaign Tasks
- > Campaign Pricing & Payments
- > Campaign Analytics
- > Campaign Privacy
- > Campaign FAQ
- > Campaign Rewards
- > Campaign Payment Troubleshooting
- > Sub Campaigns

- > Campaign Pricing & Payments
- > Campaign Analytics
- > Campaign Privacy
- > Campaign FAQ
- > Campaign Rewards
- > Campaign Payment Troubleshooting
- ▼ Sub Campaigns
 - > Sub-campaign Management
 - > Sub-campaign Content
 - > Sub-Campaigns: Goals & Deadlines
 - > Sub-campaign Teams
 - ▼ Sub-campaigns: Registration
 - What does the registration flow look like?
 - What is the confirmation message, and how do I edit it?
 - Viewing registrant (fundraiser) information
 - Automatically launch sub-campaigns
 - Mandatory approval for newly created sub-campaigns
 - Allowing team members to skip registration
 - Encourage sub-campaign customization in registration flow
 - Registration fees & rewards: how to add, edit, and troubleshoot
 - Registration waivers & compliance messages
 - Customizing the registration form
 - Registration for individuals, teams, or both

User Account Management 17

Payment Processing 29

For Supporters 27

Resources 6

About ConnectionPoint 4

Talk To Us 10

Campaign Management

Campaign Management

1. Sub-campaign management

The screenshot displays the FundRazr 'Sub-campaigns' management page. The sidebar on the left includes navigation options such as 'View campaign', 'Tasks', and 'MANAGE' (Visual editor, Content, Rewards, Settings, Team, Registration, Sub-campaigns). The 'Sub-campaigns (on)' section is expanded, with 'All sub-campaigns' highlighted by an orange arrow. The main content area shows a table of sub-campaigns with columns for Created, Title, By, Contact email, Goal, Raised, Vetting, Status, Tags, and Actions.

Created	Title	By	Contact email	Goal	Raised	Vetting	Status	Tags	Actions
Oct 12, 2022	Brad is riding with BMS to combat cancer!	ConnectionPoint Systems Inc	—	\$500	\$0	Approved	Live		...
Jun 20, 2022	Dave is walking for FundRazr Foundation!	ConnectionPoint Systems Inc	—	\$500	\$300	Approved	Live		...
Jun 20, 2022	Team West Coast is walking for FundRazr Foundation!	Team West Coast	brad@cptest.me	\$500	\$2,250	Approved	Live		...
Jun 20, 2022	Help me raise money for the FUND RUN!	Anna Waterstreet	anna@cptest.me	\$500	\$345	Approved	Live		...

To view a list of sub-campaigns, approving or denying campaigns, deleting (if no funds attached), launching, pausing, restarting, and finishing campaigns.

Click anywhere on the line in the table to option up that sub-campaign's options.

Campaign Management

2. Fundraiser management

The screenshot shows the Fundrazr interface for managing fundraisers. The sidebar on the left has a 'Fundraisers' option highlighted with an orange arrow. The main content area shows a table of fundraiser participants for a campaign titled 'Fundraisers' by ConnectionPoint Systems Inc. The table has columns for Name, Contact email, Role, Team, Signed up, and Promo code. There are also buttons for CSV and XLS exports.

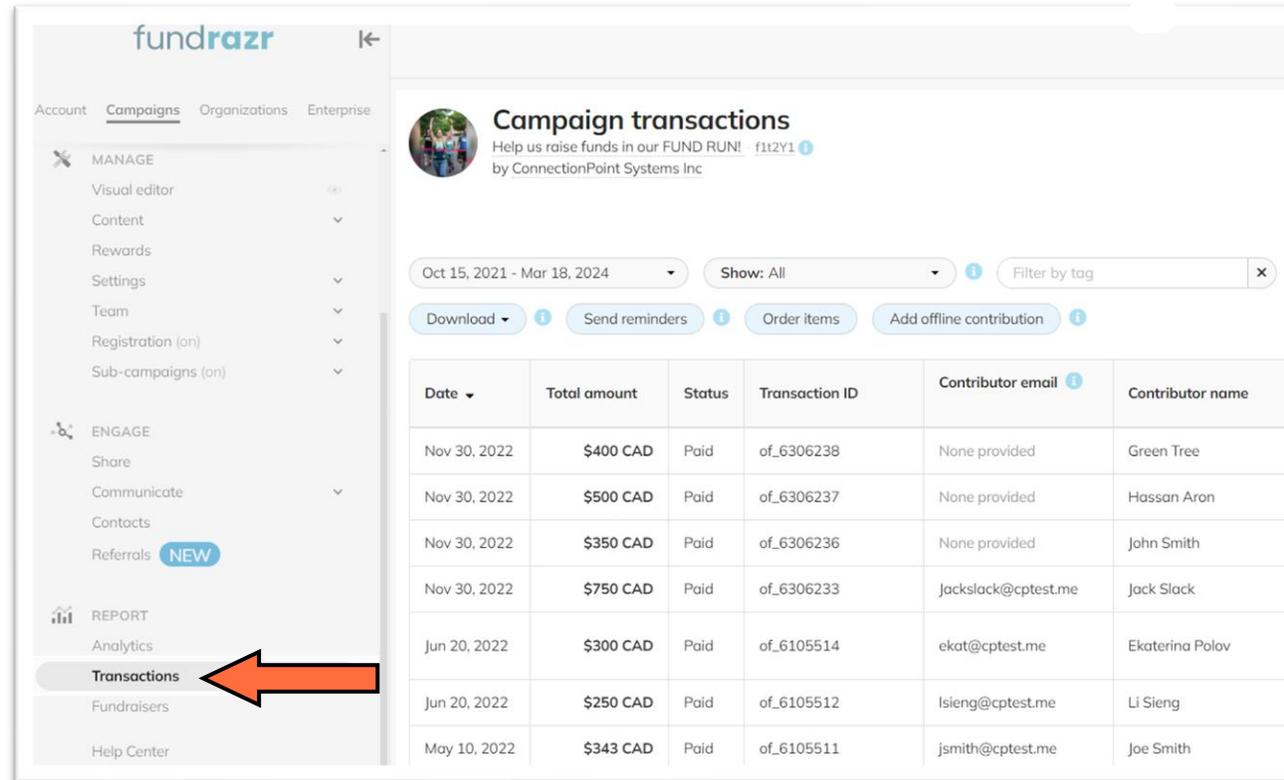
Name	Contact email	Role	Team	Signed up	Promo code
Anna Waterstreet	anna@cptest.me	Leader	Anna's team	Jun 13, 2022	—
Anna Waterstreet	anna@cptest.me	Leader	Anna's team	Jun 1, 2022	—
Brad Tester	brad@cptest.me	Leader	Team West Coast	Jun 20, 2022	—
Brad Waterstreet	brad@cptest.me	Member	Team West Coast	Jul 20, 2023	—
Cara Waterstreet	cara@cptest.me	Member	Anna's team	Jun 29, 2023	—
Dave Waterstreet	dave@cptest.me	Member	Team West Coast	Jul 20, 2023	—
Emma Waterstreet	emma@cptest.me	Member	Team West Coast	Oct 13, 2022	—

To view a list of all participants, switch teams, and view custom registration information (in downloaded files).

Click anywhere on the line in the table to option up that fundraiser's options.

Campaign Management

2. Contribution management



The screenshot displays the Fundrazr Campaign Management interface. The left sidebar contains navigation menus for MANAGE, ENGAGE, and REPORT. The 'Transactions' option under the REPORT menu is highlighted with a red arrow. The main content area shows the 'Campaign transactions' page for a campaign titled 'Help us raise funds in our FUND RUN! f1t2Y1' by ConnectionPoint Systems Inc. The page includes a date range filter (Oct 15, 2021 - Mar 18, 2024), a 'Show: All' dropdown, and a 'Filter by tag' input. Below these are buttons for 'Download', 'Send reminders', 'Order items', and 'Add offline contribution'. A table lists the transactions with columns for Date, Total amount, Status, Transaction ID, Contributor email, and Contributor name.

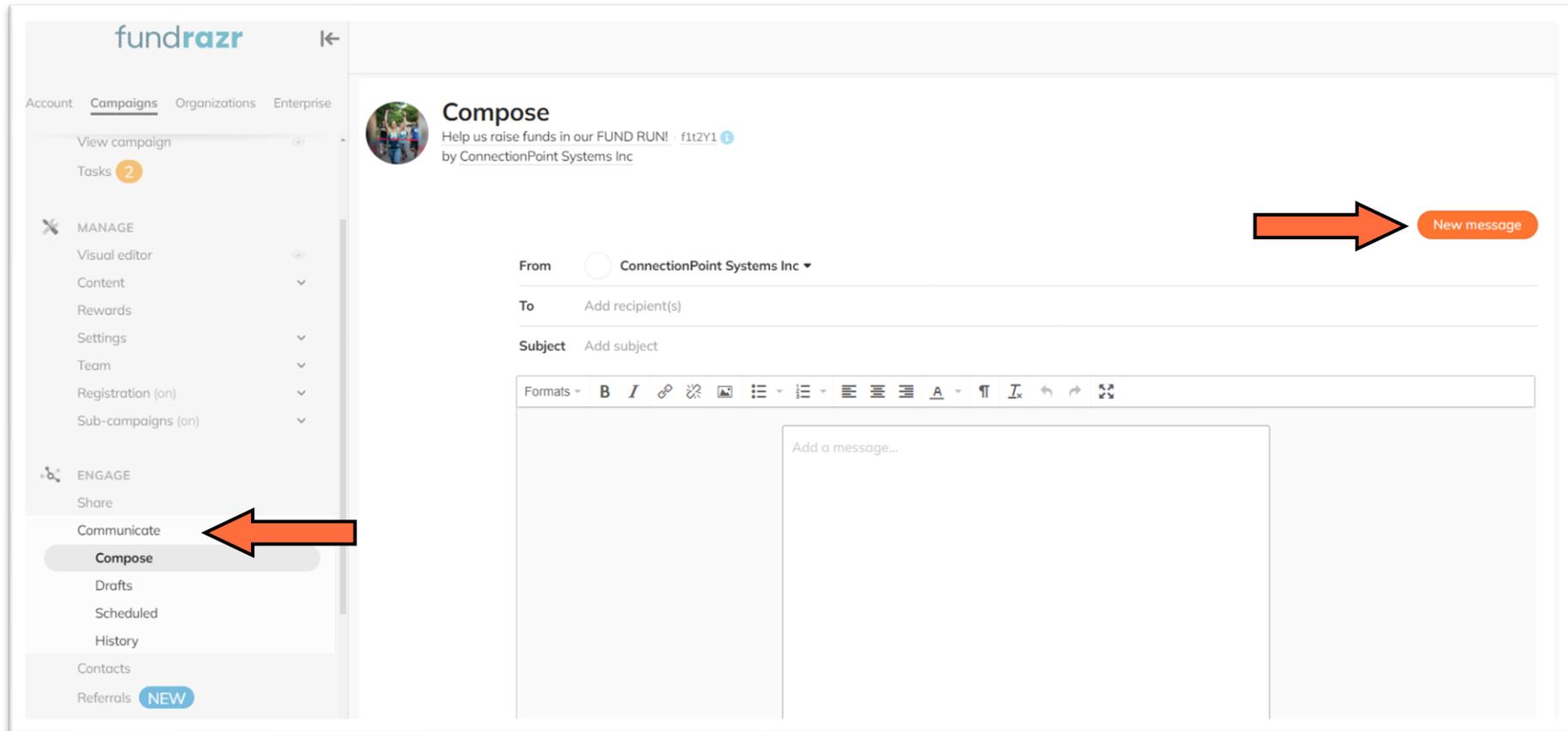
Date	Total amount	Status	Transaction ID	Contributor email	Contributor name
Nov 30, 2022	\$400 CAD	Paid	of_6306238	None provided	Green Tree
Nov 30, 2022	\$500 CAD	Paid	of_6306237	None provided	Hassan Aron
Nov 30, 2022	\$350 CAD	Paid	of_6306236	None provided	John Smith
Nov 30, 2022	\$750 CAD	Paid	of_6306233	Jackslack@cptest.me	Jack Slack
Jun 20, 2022	\$300 CAD	Paid	of_6105514	ekat@cptest.me	Ekaterina Polov
Jun 20, 2022	\$250 CAD	Paid	of_6105512	Isieng@cptest.me	Li Sieng
May 10, 2022	\$343 CAD	Paid	of_6105511	jsmith@cptest.me	Joe Smith

To view and update donor information and attribute or re-attribute contributions.

Click anywhere on the line in the table to option up that transaction's options.

Communication

Communication



To message all fundraisers, donors, team members, or everyone!

TECHNICAL HELP ARTICLE: <https://connectionpoint.com/help/docs/communication-centre-user-guide/>

Resources

Resources

HELP CENTER (Technical platform help): <https://connectionpoint.com/help>

FUNDRAISER HUB (Campaign strategy help): <https://connectionpoint.com/fundraiserhub/>

PLATFORM SUPPORT: support@connectionpoint.com (any platform)

THANKS!

FUNDRAISER
HUB by 
connectionpoint