CoCoPay is on a mission to help healthcare providers, medical device manufacturers, patients and their communities collaborate to increase access to quality healthcare. As a result, we build a healthier, happier society.

Organizational Toolkit

For medical clinics, treatment facilities, or device manufacturers and distributors

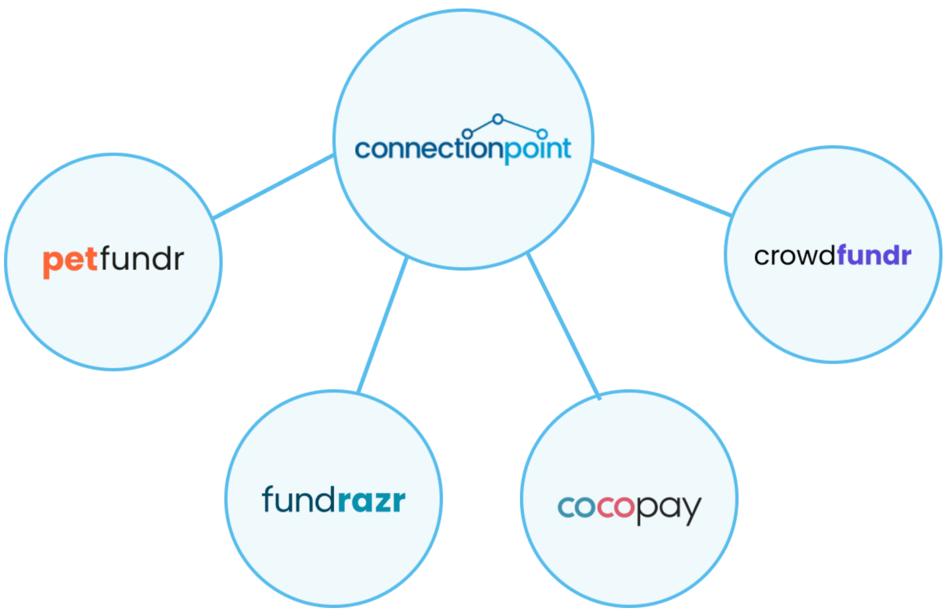
Table of contents

Welcome!

Welcome to CoCoPay - a branch of the ConnectionPoint family.

Here, we merge innovative crowdfunding technology with strategic partnerships to create a new class of fundraising – **crowd-financing**.

CoCoPay belongs to the ConnectionPoint platform suite - providing innovative social technology solutions since 2009.



The flagship brand – FundRazr – received multiple awards and helped more than 6000 organizations raise money online. Continuously praised by customers and independent publications as an “easy-to-use social digital fundraising platform,” FundRazr helps make positive impact via crowdfunding.

CoCoPay brings the same excellence in innovation, functionality, and customer-first approach.

In this guide, you will find everything you need to get started with your customized CoCoPay crowdfunding portal, so you can get your clients or patients up and running with their own crowdfunding page quickly and easily.

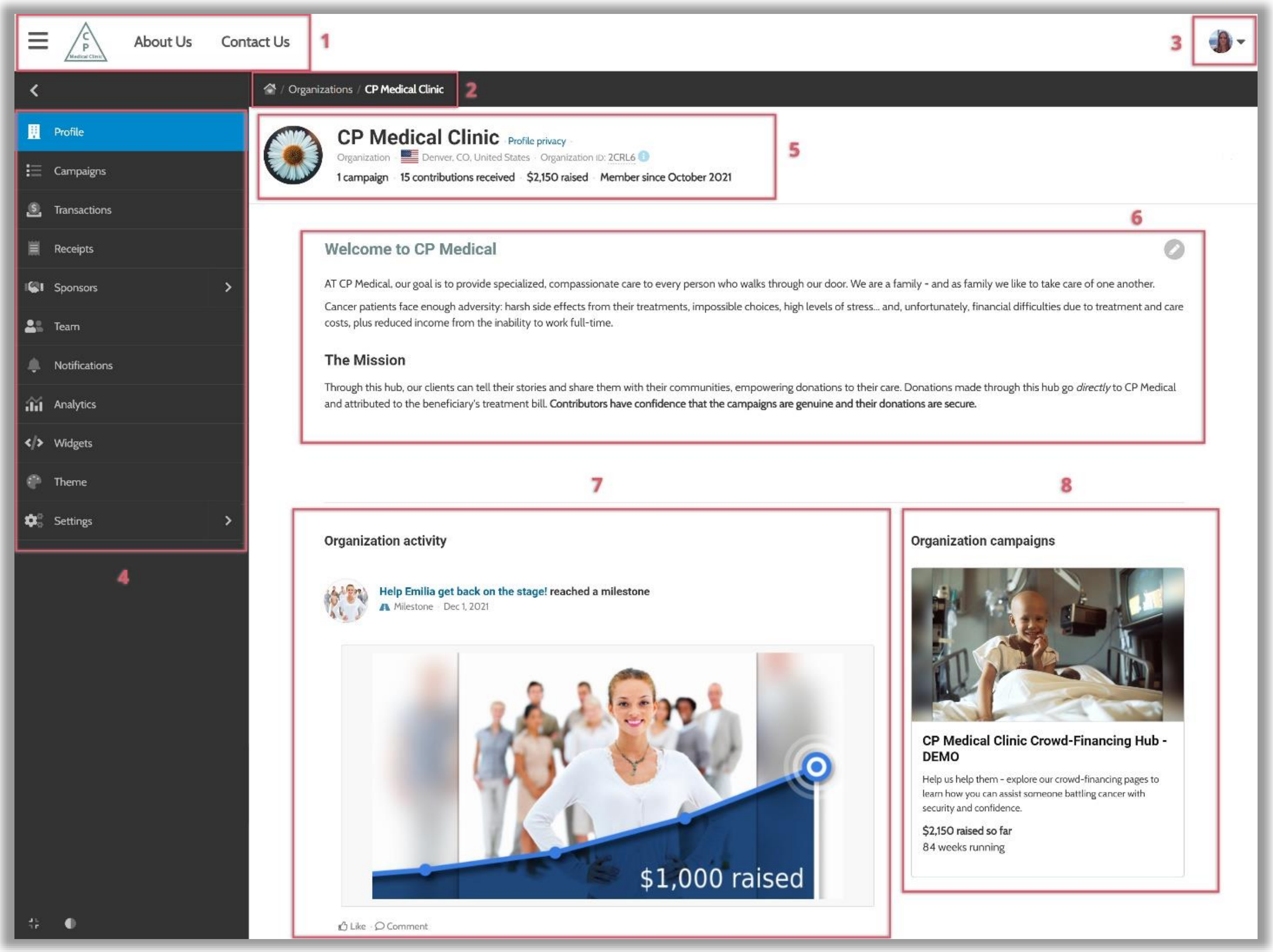
Checklist: What do I need to get started?

- ☐ Clinic logo (PNG format preferred)
- ☐ Branding colour palette and font details
- ☐ Staff contacts (specifically, the emails of those in your clinic requiring administrative access to your campaigns)
- ☐ Pictures, videos, and other media
- ☐ Values, mission, and other communications to feature on your CoCoPay campaigns.
- ☐ PayPal and/or Stripe administrator account login credentials

Please note that if you've chosen our implementation services, the initial setup with these items will be done for you!

Get to know CoCoPay

Organization Profile (Admin view)



1. **Header –** customizable logo, navigation links, and color.
2. **Breadcrumbs –** easily move between menu levels.
3. **User profile menu –** update personal profile information such as profile picture and log-in details.
4. **Sidebar menu –** explore options to customize your organization theme, review receipting information, and create custom widgets.
5. **Organizational information –** quick details on your organization.
6. **Profile information –** rich-text editor to input important information.
7. **Organization activity –** see the most recent activity (contributions, updates, etc.) for your campaigns.
8. **Organization campaigns –** list of current campaigns (live only; most recent on top).

Campaigns

Types

You may choose from two campaign types on CoCoPay: Keep-it-all and All-or-nothing.

Keep-it-all

Keep-it-all campaigns consist of two main features:

- Goals and deadlines are optional, and
- All contributions are processed immediately as transactions, regardless of whether a goal is reached.

These campaigns are helpful for clients who can use any funding they receive, even if they have a goal and do not reach it.

All or nothing

All-or-nothing campaigns:

- Require a goal,
- Can run for a maximum of 60 days (but you may choose to run for less), and
- Only process transactions once the goal is reached (not automatic – a 'Charge supporters now' button must be triggered).

When clients require ALL funds to move forward, all-or-nothing campaigns are the best option. There is a risk-free factor if they do not reach their goal within the deadline, for no supporter will be charged, and zero fees are owed to CoCoPay or the payment processor.

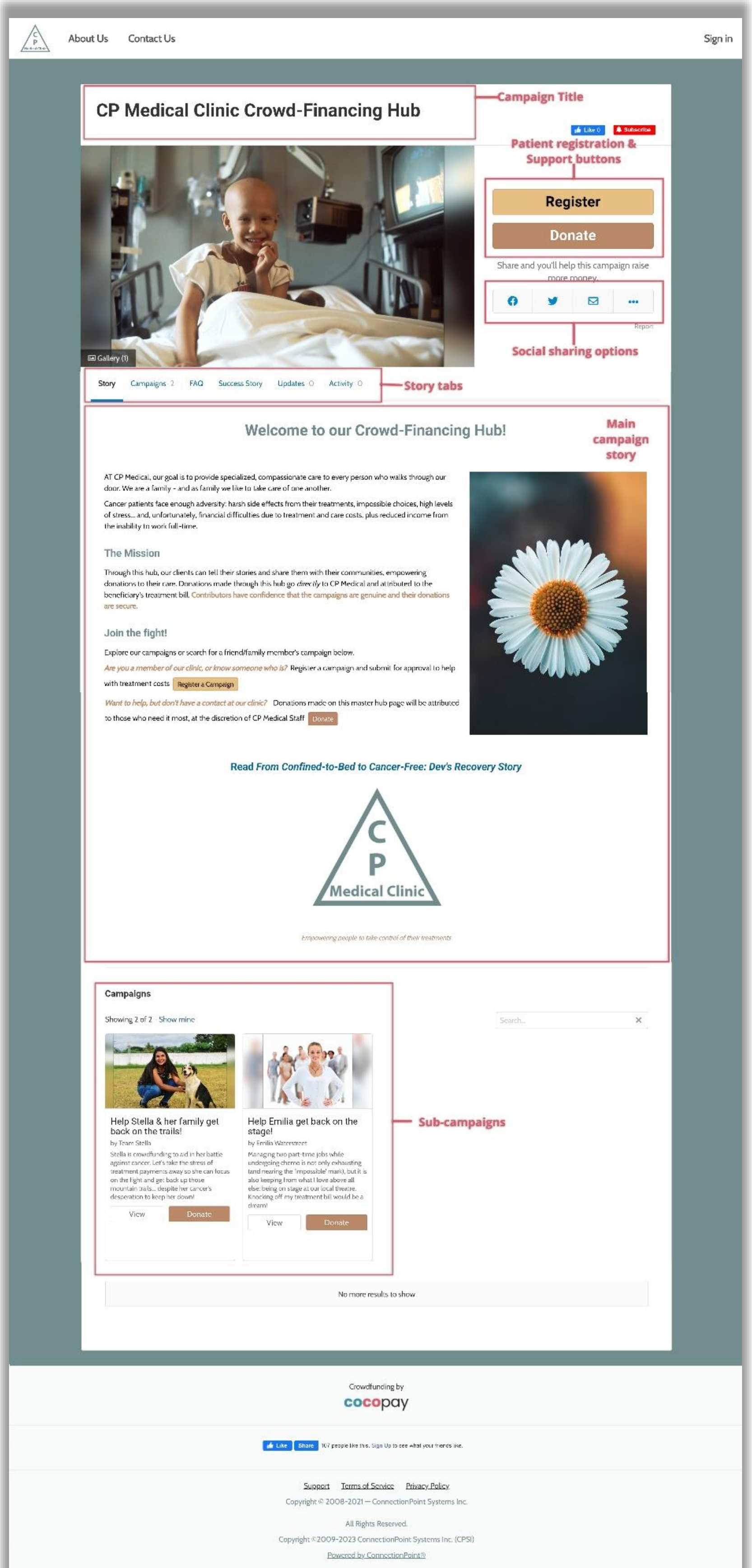
Layouts

There are multiple layouts available in CoCoPay; however, there are two common layouts for most situations:

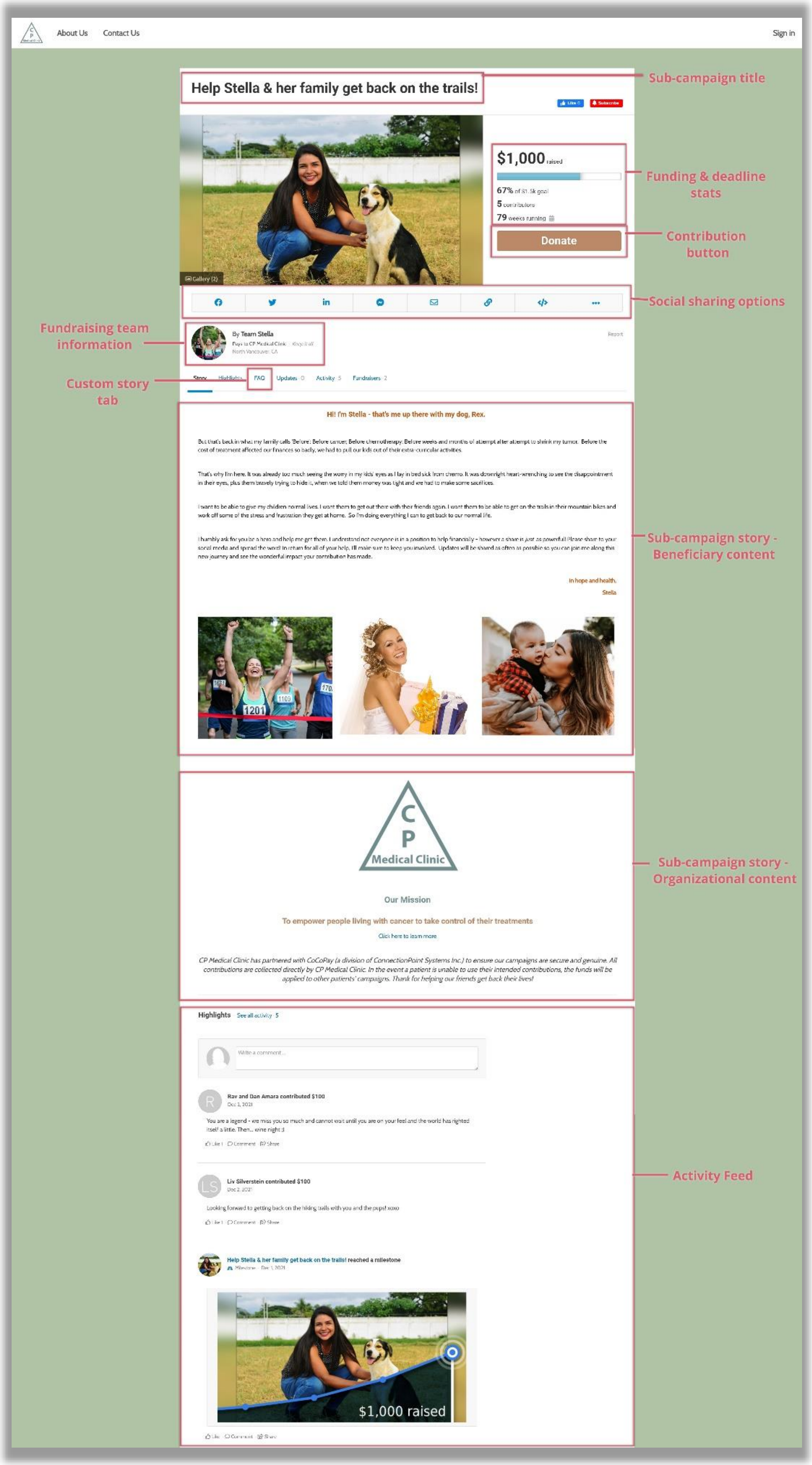
- **Do-it-yourself campaign -** a main campaign run by the clinic or manufacturer that tells the overall story of what campaigns raise funds for, plus provides clients with a platform to register their campaigns, called sub-campaigns. If you choose, the main campaign can also receive funds directly. This layout is helpful for medical professionals wanting clients to create their crowdfunding campaigns.

- **Microproject with grid campaign -** much like DIY campaigns, except the registration features are removable. Sub-campaigns are created by the clinic or manufacturer, with ownership transferred to the patient later. The main campaign can also receive funds if you choose. This layout is the most common for medical professionals wishing to set up campaigns for their clients.

Main campaign example (Public view)

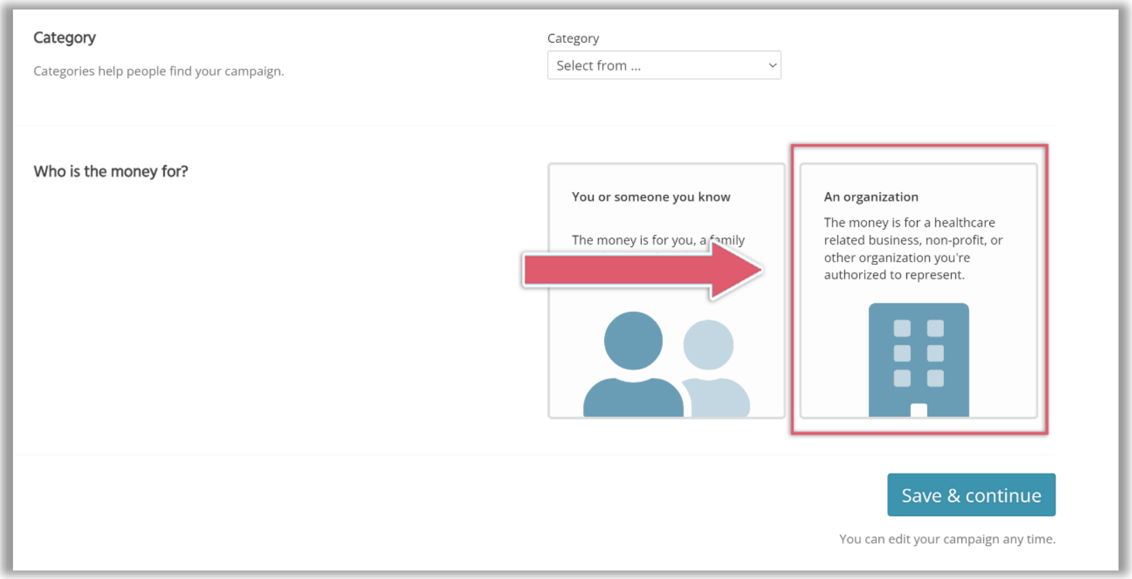


Sub-campaign example (Public view)



Getting Started

To create your organization profile and first campaign in CoCoPay, visit **https://cocopay.co/create**. Choose “An organization” when answering “Who is the money for?”.



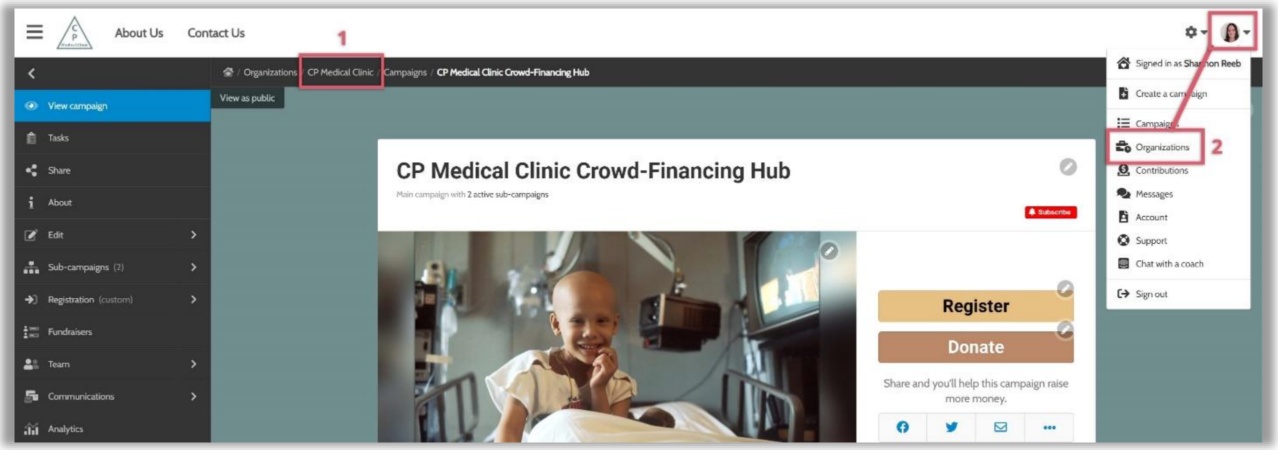
Fill as much or as little as you like in the campaign creation flow. You can update and change things later **(except for campaign type, so make sure you know whether keep-it-all or all-or-nothing is best for you).**

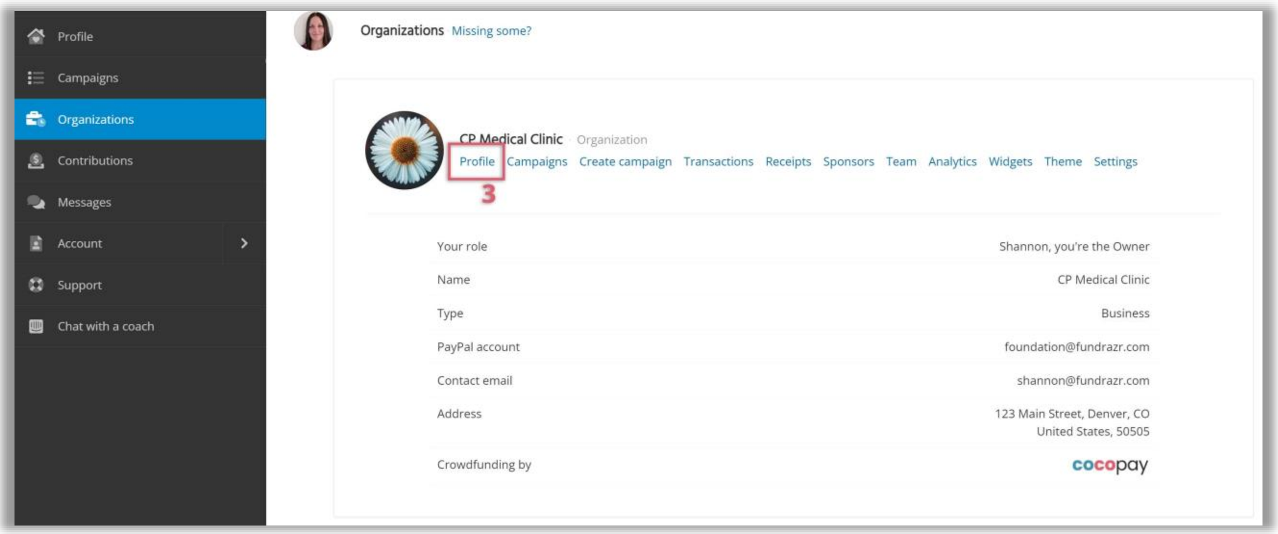
Once you’ve finished the creation flow, the platform will open to your new campaign template.

Customizing your profile

Your PetFundr organization profile and campaigns are customizable. Customizing the public profile, header, logos, font, and colours creates a smooth transition between your website and PetFundr and enforces brand recognition for your practice.

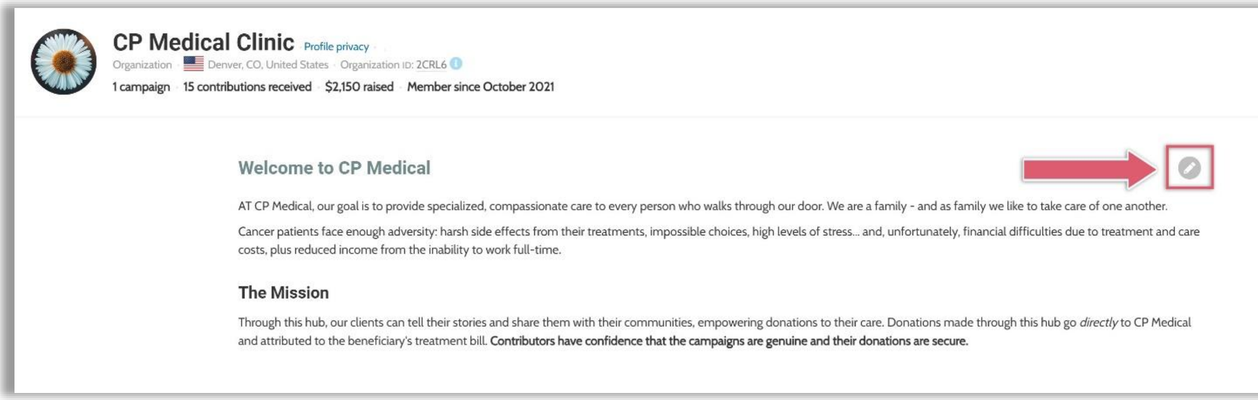
You can get to this profile via the breadcrumbs of your campaign (1) or by clicking “Organizations” in the User Account menu (2) and then the appropriate profile (3).





Profile story

When viewing your organization profile, click the edit pencil to the upper right of the profile window, and the profile will open into a rich text editor.

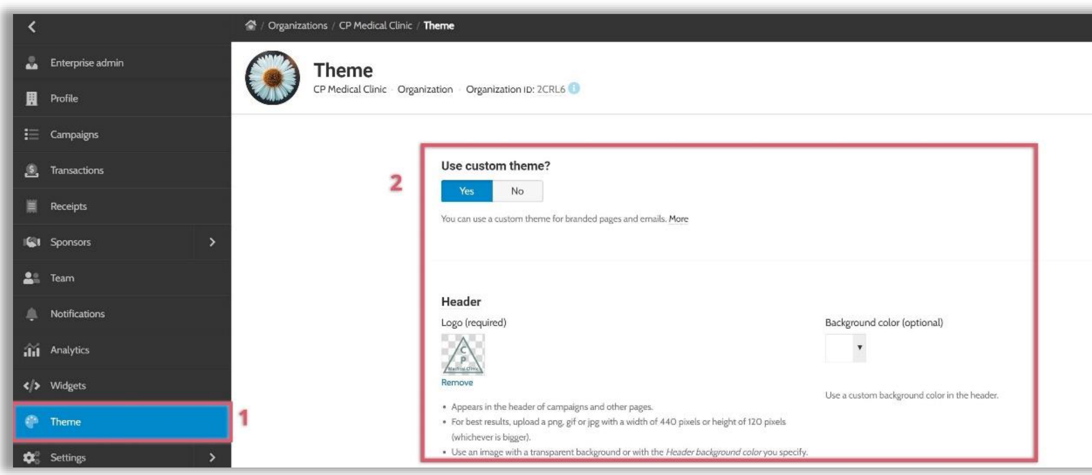


If you need help with the rich text editor, please visit our Help Centre at **connectionpoint.com/help.** Suggestions for content are found on **page 25** of this guide.

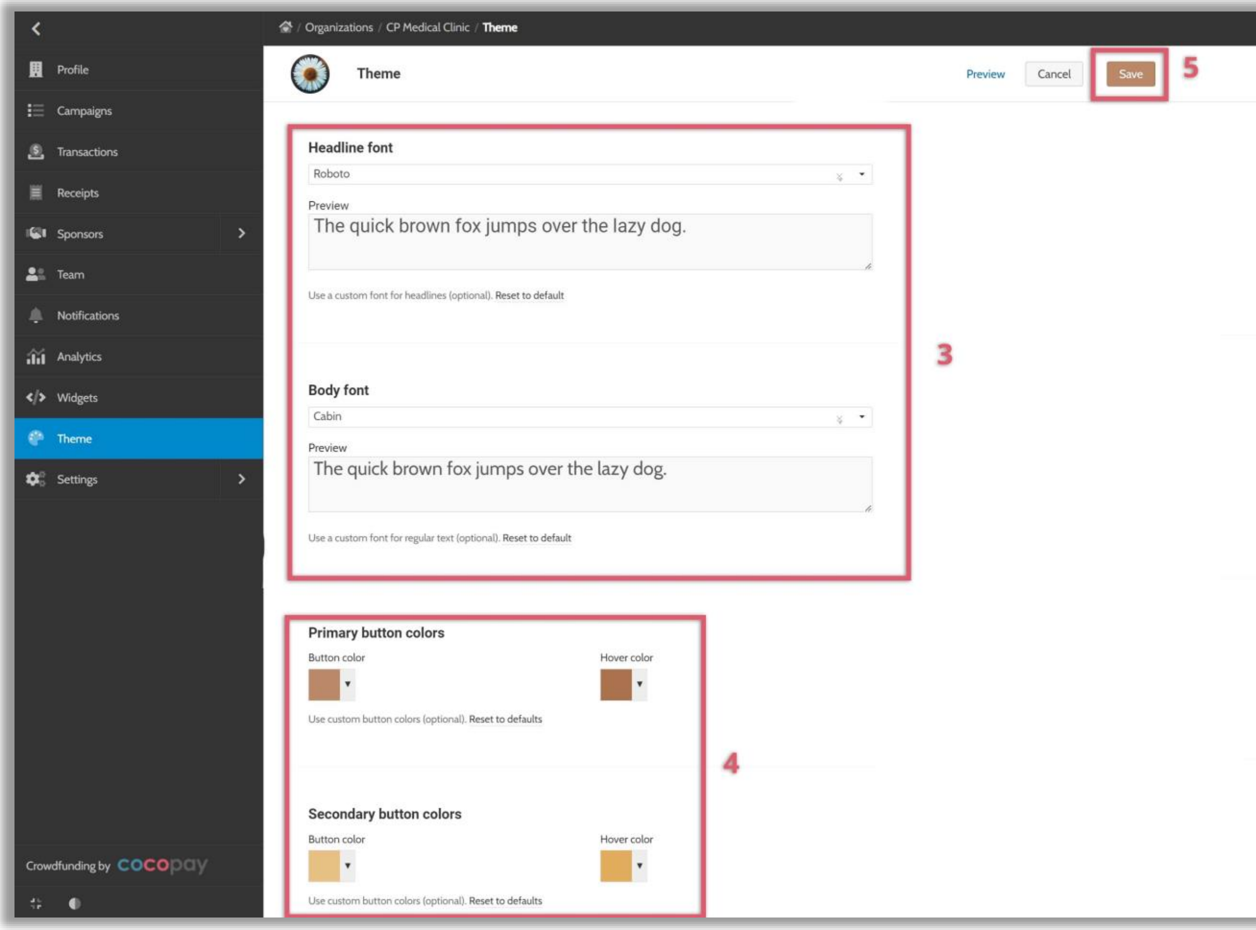
Profile theme

Customize the header, font, and other features in the **Theme menu** of your Organization Profile (Note: if you chose our implementation package, we would have set your theme for you. These are always editable!).

Click the "Theme" option in the sidebar menu (1). From here, you will see options to upload your logo, choose a colour, and insert navigation links for the header bar (2).



Scroll down for options to customize the fonts for your public profile and campaign (3). **Note: CoCoPay uses Google fonts; if yours does not appear in the list, do a web search for a Google-font alternative.** You can also change the colour of the primary (Contribution) and secondary (Register) buttons (4). Explore the other options and add as much information as you can. Don't forget to Save when you're done (5)!



Payment processing and receiving funds

How it works

CoCoPay connects with Stripe and PayPal accounts for payment processing. Funds are deposited directly into these accounts once transactions complete processing.

This fund transfer occurs between your clinic or company and the payment processor – CoCoPay does not hold your funds. Applicable fees from CoCoPay or the processor are deducted from the transaction; no reconciliation is necessary.

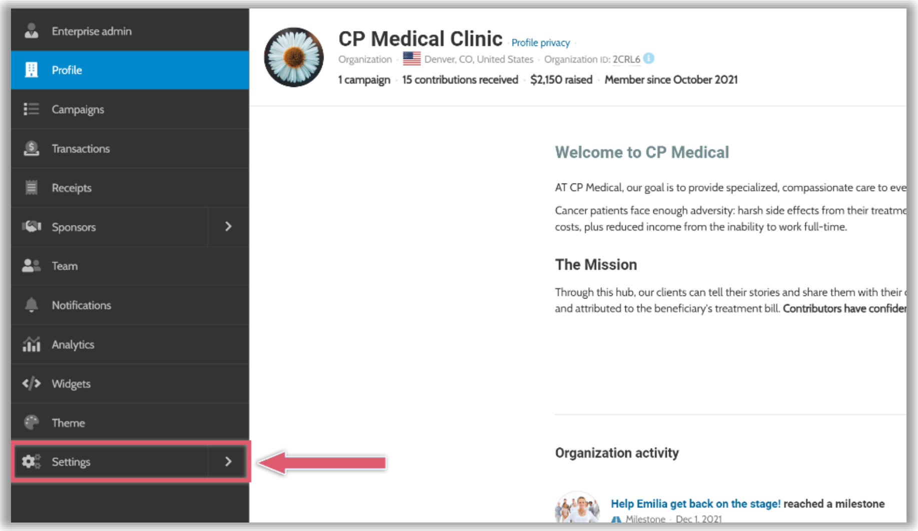
Depending on the campaign type (**see page 7**), funds appear in your practice's Stripe or PayPal account either soon after each transaction (for keep-it-all campaigns) or after the campaign has reached its goal and you or your client chooses to charge all pledgers (for all-or-nothing campaigns).

CoCoPay recommends obtaining *both* Stripe and PayPal accounts to process payments (if both are available in your region). Doing so opens all options for supporter checkout: credit card, debit card, Google Pay, Apple Pay, PayPal account, and bank account. The more options available, the greater the chance for success as supporters get to choose what is best for them, plus they have other options if one of these services is down.

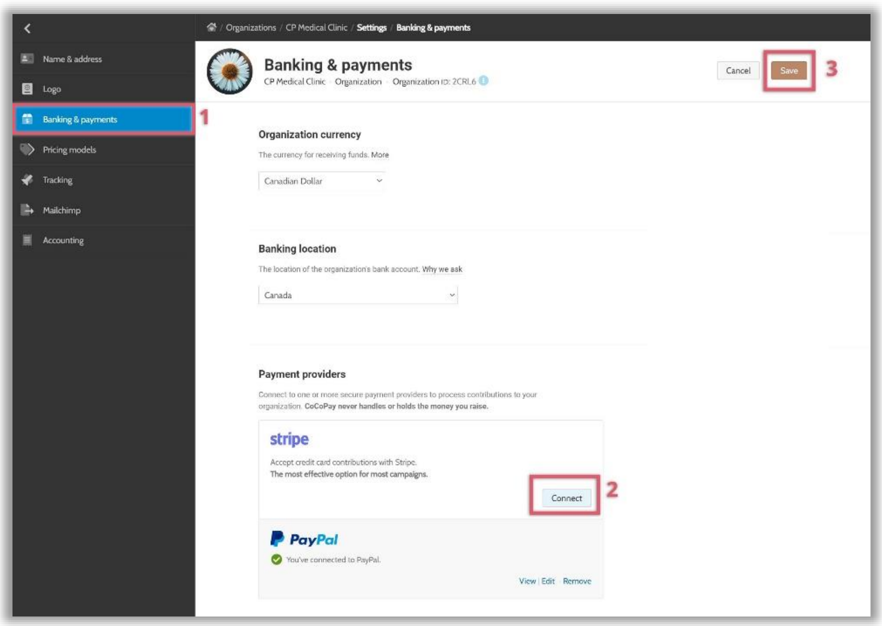
Please note that supporters do NOT require a PayPal account to checkout via credit card with PayPal. However, your PayPal account must be Verified, and the email address must be confirmed to open this guest-checkout option.

Adding/Changing payment processing accounts

Only the 'Owner' of your organization profile may add or change payment processing accounts. To add or change your practice's payment processing accounts, click "Settings" in your organization profile:



Then click "Banking & payments" (1), scrolling until you see "Payment Providers." Click 'Connect' (2) by the appropriate provider to add yours. ***You MUST click "Save" in the upper right corner (3) to complete the connection!***



Please note: if you cannot see a 'Connect' option, contact PetFundr (support@petfundr.com) to add or change your payment processing account.

Pricing

Once you've connected to a payment processing account, transactions on CoCoPay are processed using your specific rate with Stripe or PayPal, whether standard or customized. Fees are automatically deducted from each transaction; you have no reconciliation with CoCoPay, Stripe, or PayPal after the fact.

CoCoPay has three pricing models you can choose from. Different campaigns may be run on different pricing models (although sub-campaigns can only inherit the model its main campaign has), and you may switch models at any time, even while the campaign is running.

Simply Free (0% platform fee) – your clinic or company only pays the payment processing fee to Stripe or PayPal per transaction. CoCoPay will ask your supporters for an optional 'top-up' to help keep the platform free for those needing this option.

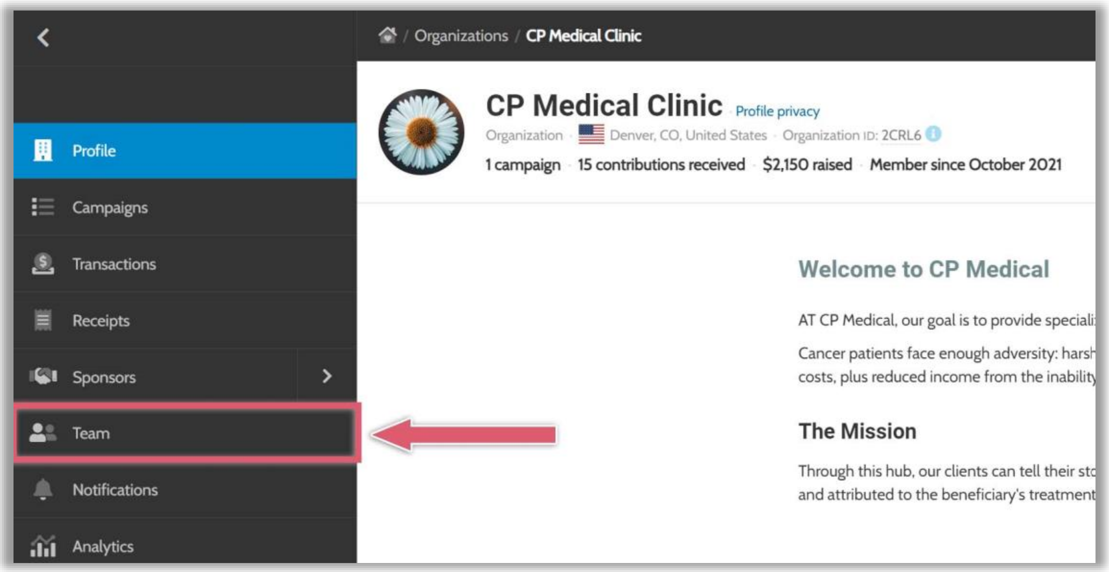
Nearly Free (Fee recovery model) – Payment processing fees and CoCoPay's standard 5% platform fee are added, and supporters choose whether to cover *all fees* for the transaction. Covering fees is optional; if the supporter opts out, fees are deducted from the intended contribution. As payment processing is also covered, this model could result in a lower cost of fundraising than the 'Simply Free' model.

Not Free (payment processing + platform fee) - Payment processing fees and CoCoPay's standard 5% platform fee are added, but the supporter is NOT asked for anything further. Fees are deducted from their **contribution,** and you receive the net amount in your account.

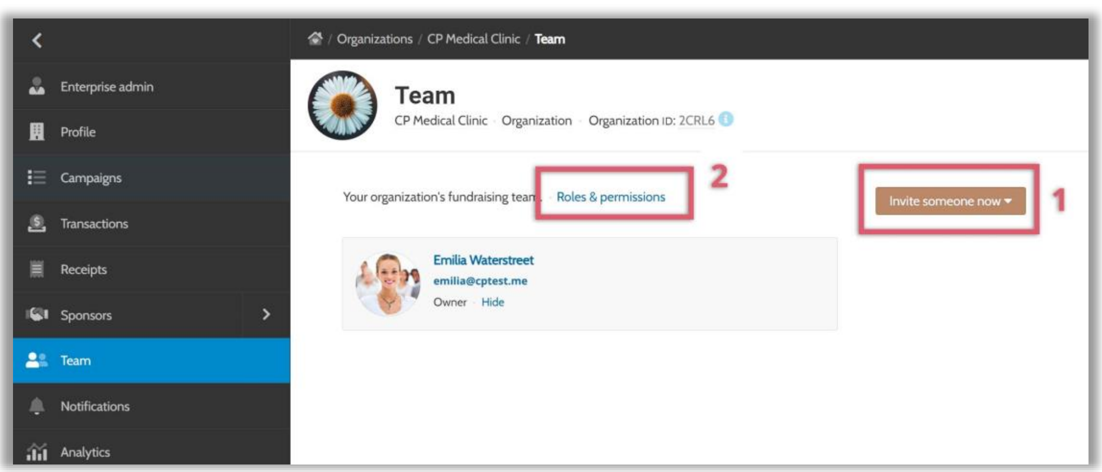
Choosing your staff

As many staff members as needed may join the organization team to help manage campaigns, finances, and patients.

To add staff members, view your organization profile and click 'Team' in the sidebar menu.



Then click 'Invite someone now' (1) and add the email for the staff member, choosing their role.



You can view the roles by clicking ‘Roles & permissions’ (2). But in general:

- **Owner –** Owners ultimately control the organization profile and every campaign involved. They are the only staff member able to change payment processing accounts. Only one Owner is allowed.

- **Manager –** Managers have limited control of the organization and complete control of every campaign. They can edit the campaign, post campaign updates, access transaction information, and invite/remove team members.

- **Editor –** Can view and edit campaigns, post updates, and manage contacts in the Communications Center. They cannot access contributors’ personal information or invite/remove team members. They cannot view transactions.

- **Promoter –** Promoters can import contacts and post updates on all campaigns. They cannot edit campaigns or the organization profile, access private contributor information, view transactions or invite/remove team members to the organization or its campaigns.

Creating a campaign

You may create as many campaigns as you like in CoCoPay, using whichever layouts work best for your clinic. Here, we will be outlining how the Do-It-Yourself layout works.

In this layout, you create a **main campaign**, which tells the overarching story of your service or mission. Then, depending on what works best for your clinic and specific situation, you have two options to create **sub-campaigns**:

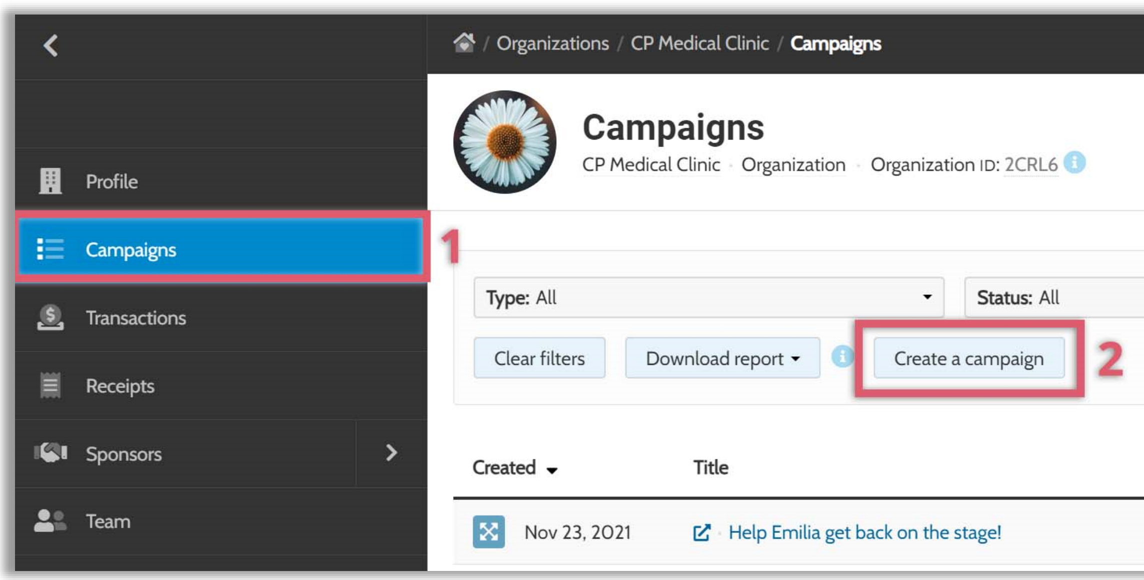
1. Patients register sub-campaigns via the main campaign's Registration button, or
2. You create campaigns on your patients' behalf and transfer ownership.

Sub-campaigns have their own funding goals, but the funds collected roll up into an overall amount that the main campaign can tally if you wish (you can also hide this information, as shown in the image on page 9).

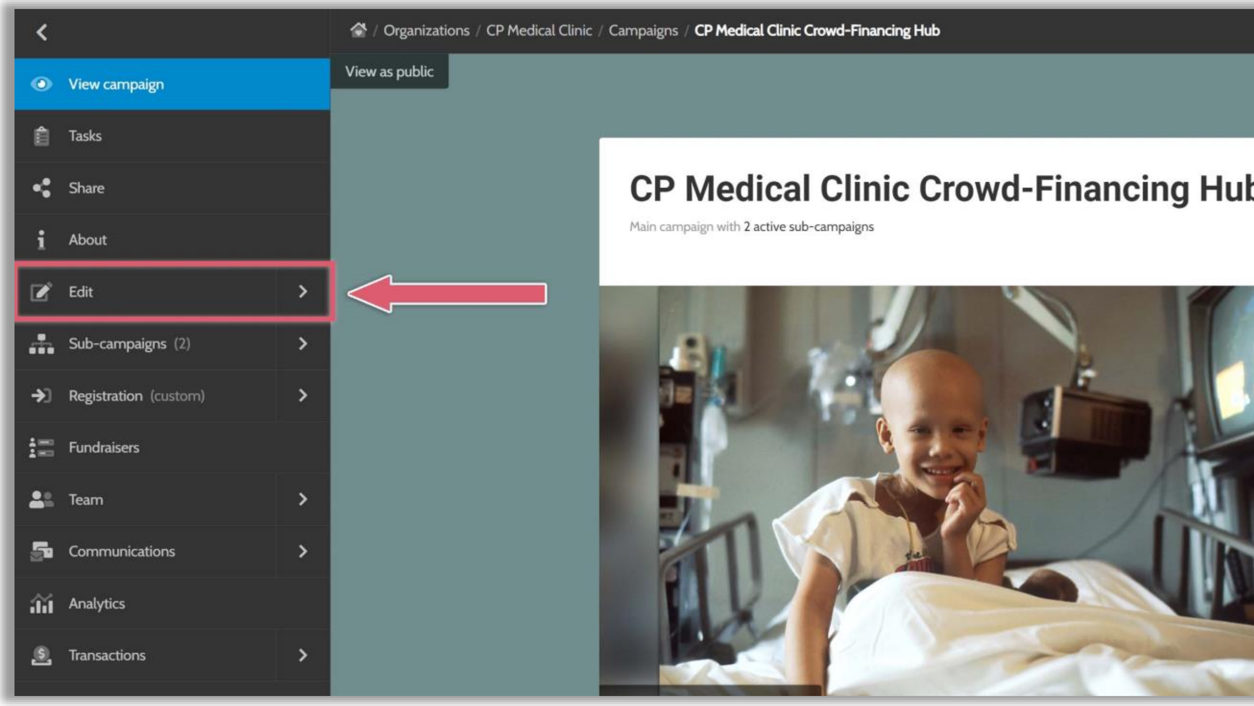
The benefits of this campaign type are:

- Easy patient registration (or registration on a patient's behalf),
- Option to require approval before a campaign is live (with patient registration),
- Visitors may see the total funds you've helped your patients crowdfund (if you wish),
- Patients or their loved ones can personalize their campaigns without changing the main campaign story, theme, or organizational information.
- Private information such as contributor details for campaigns your patient is not involved with is kept confidential.

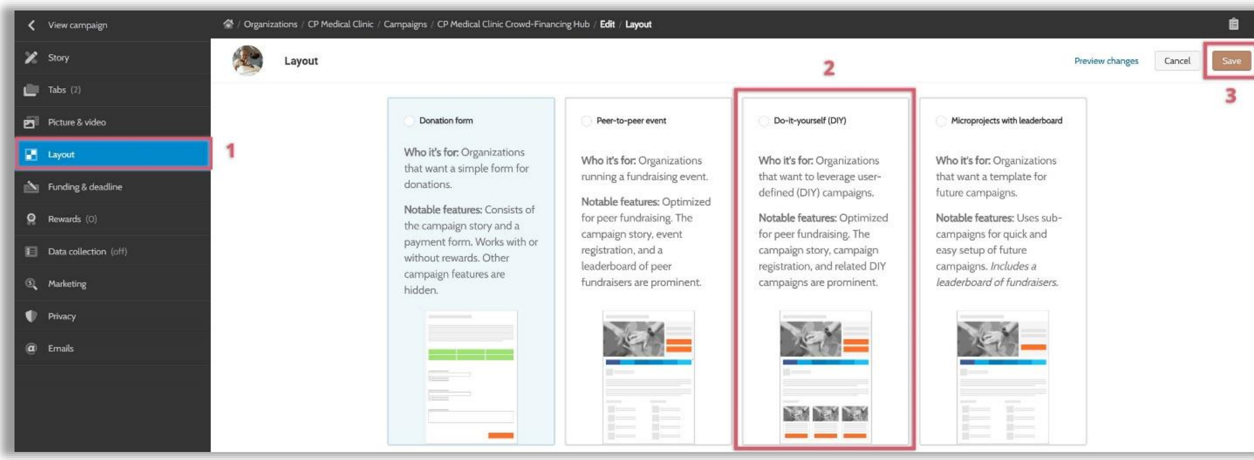
To start a new campaign, go to your organization profile and select "Campaigns" in your sidebar menu (1), then "Create a campaign" (2):



Once you complete the campaign flow, view the layout options by clicking the "Edit" option in the sidebar menu of the newly created campaign template:



Then, click "Layout" (1). The DIY layout is the last option (2). Don't forget to hit "Save" (3)!



Please note that this layout is just a suggestion. Feel free to explore the others for whatever might work better for your clinic or company!

Editing your main campaign

Title

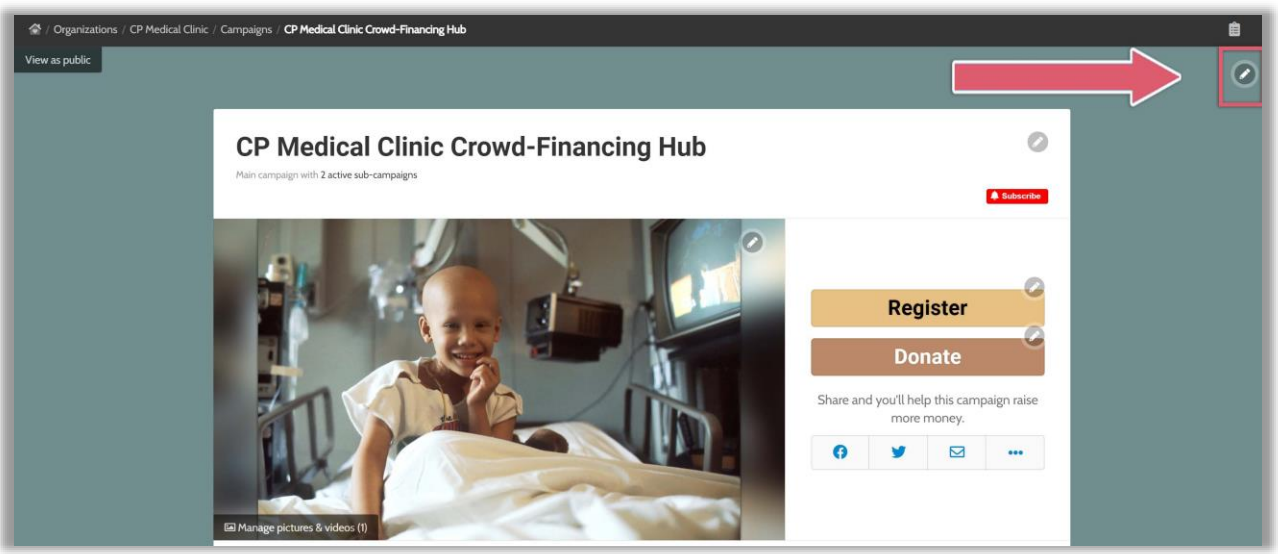
Your campaign title should show the purpose of this campaign. We recommend something like “Help someone with (*treatment name*) to improve their life!”

The title is always editable, so don’t worry if you think up something better later!

Background

Including a background image or changing the colour can pull the visual appeal of your main campaign together.

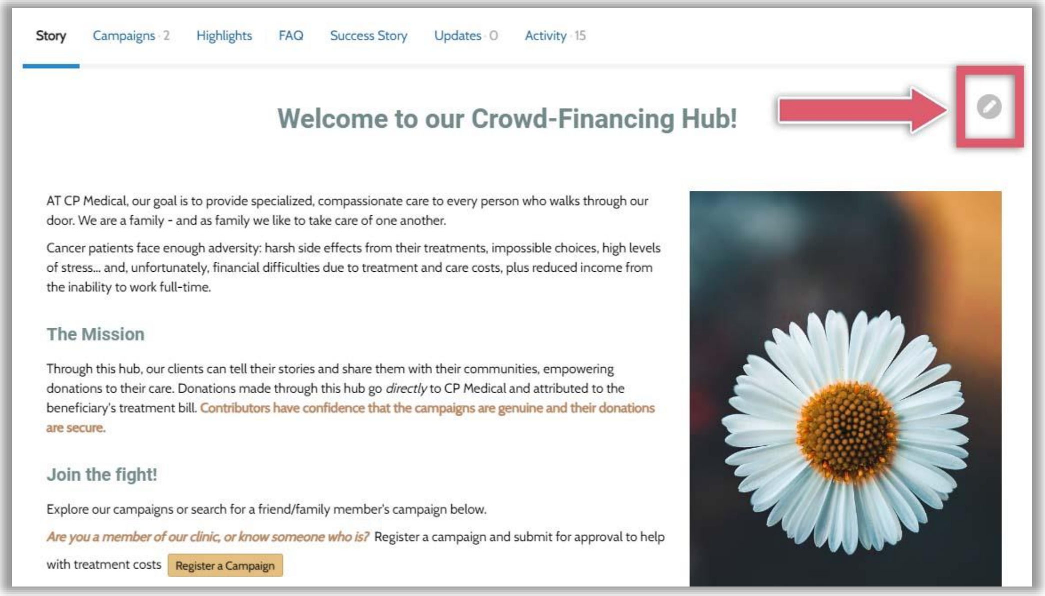
You can find the pencil icon to change the background image in the upper right corner of the main campaign window:



Follow the size parameters the platform suggests to prevent a blurry background image.

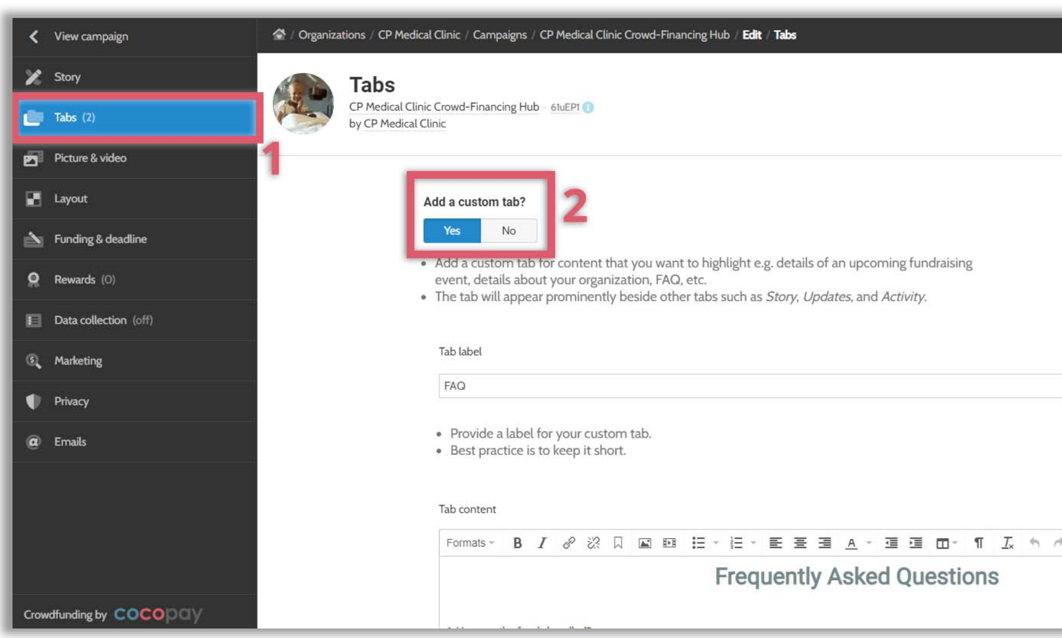
Main campaign story

Edit the main story with the pencil icon in the story window's upper right corner. See page 20 for suggestions on what to include.



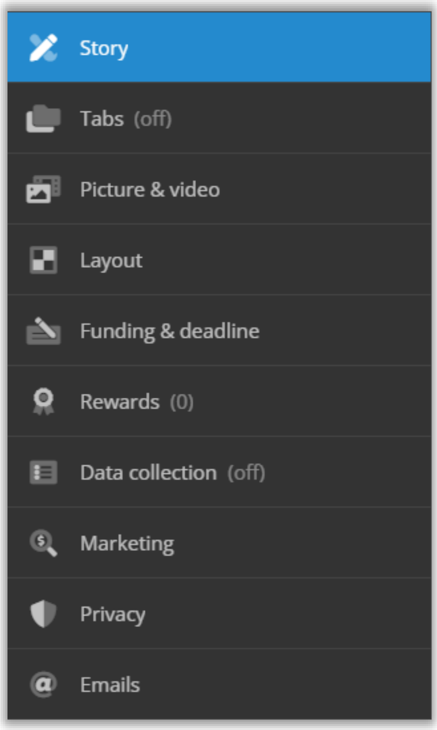
Custom Tabs

Include up to two custom tabs on your story page for extra information you don't want to crowd your main story with. To do so, click 'Edit' in the sidebar menu, then 'Tabs' (1). Toggle "Add a custom tab?" to **Yes** (2).



Campaign 'Edit' Menu

Many optional settings are found in the Edit menu for your campaign. Explore these options and choose what is best for your clinic and patients.



Telling your stories

There's a lot of information to tell your patients and their supporters, and many options for where to put that information. Use these suggestions to coordinate where you insert certain information and coach your clients on what they should contribute.

Organization Profile Story	**Main Campaign Story**
• Who you/your clinic or company is. • The product or service you provide your clients. • Where you operate and any business-specific information you might want to carry over from your website.	• Who your patients are. • How they benefit from your treatment • Why your clinic chose to offer crowd-financing options
Sub-campaign Story – Clinic Content	**Sub-campaign Story - Patient Content**

• Logo/Mission statement
• Link to either website or main campaign
• Statement piece on the partnership with CoCoPay, explaining how you receive the funds directly, so contributions are safe, secure, and genuine.
	The **Patient Coaching Guide** also explores this content in detail.
	
	• Who is running the campaign? The patient or a loved one?
	• Details of illness/injury and treatment solution the patient is comfortable sharing.
	• Most of the story should be the emotional appeal:
	  ◦ What does this mean to the patient?
	  ◦ What do they want to get back to doing/start to do with this treatment?
	• Pictures/video (optional)
	  ◦ 3-5 pictures/ 30-60 sec video
	  ◦ Choose media showing the patient doing something they love, with friends/family, and/or a smiling headshot

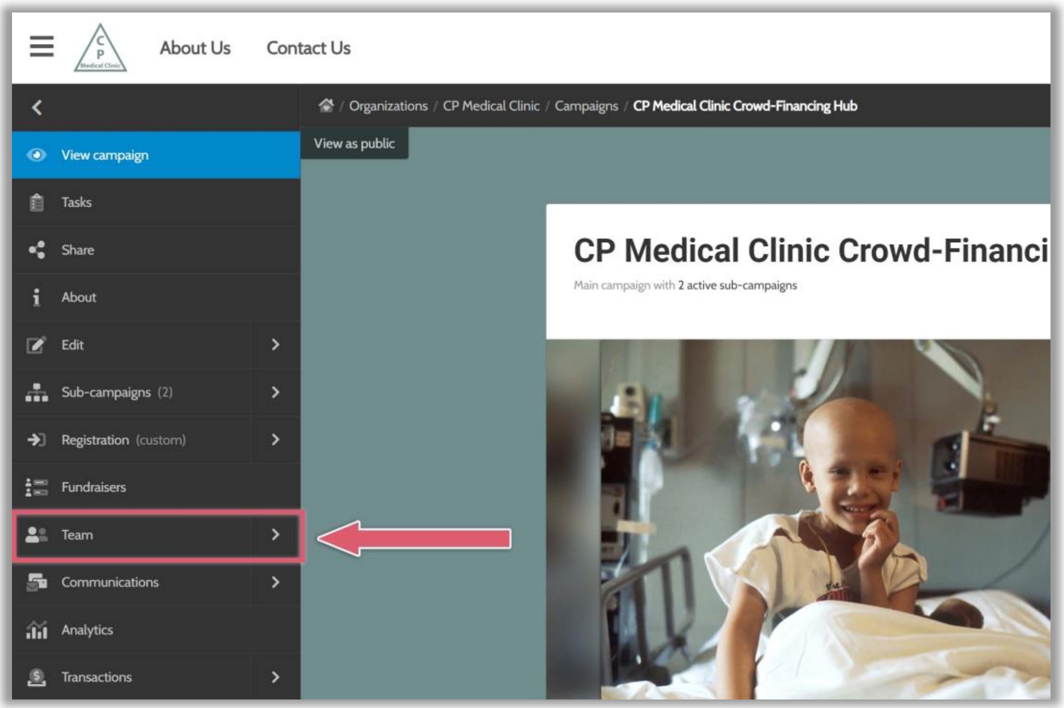
Extra Tabs: Main Campaign	**Extra Tabs: Sub-campaigns**

• Extra info such as:
  ◦ Success Story
  ◦ Further info about your clinic or treatment practices
  ◦ FAQs on crowdfunding
	Also covered in the **Patient Coaching Guide.**
	
	• Extra info such as:
	  ◦ More info about clinic or treatment practices
	  ◦ FAQs on crowdfunding

Campaign Teams

Members of your organization profile's staff will have Manager permissions on all campaigns under your umbrella. However, if others want to help run your campaigns, invite them to the **Campaign Team** without giving them permission on the organizational level.

To invite members to the team and view available roles and responsibilities, click 'Team' in the sidebar menu of your main campaign.

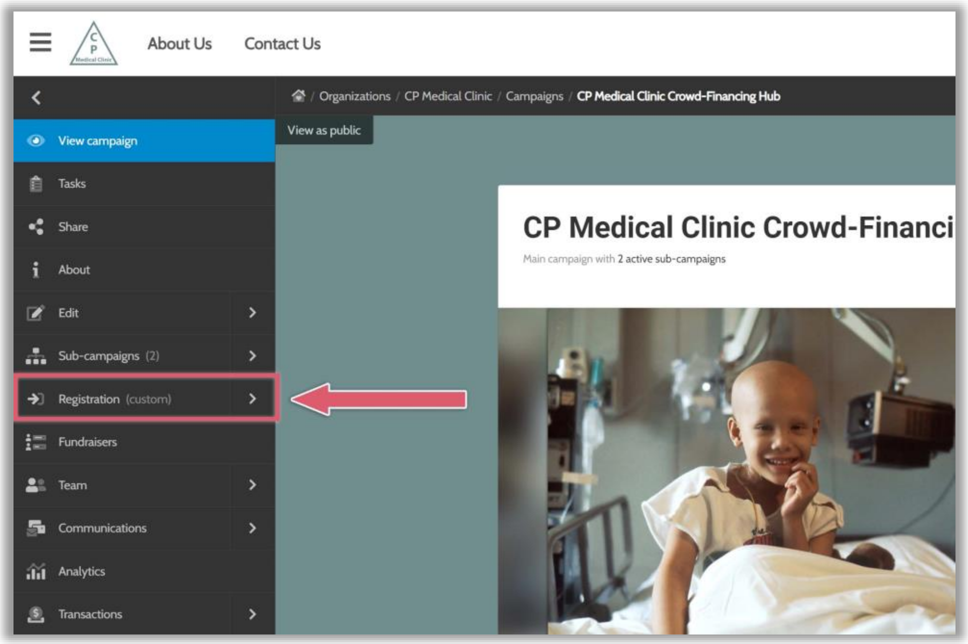


The method for inviting members, plus roles and permissions are similar for these campaign teams as your organization staff team on **page 14**, with one new role added:

Member – This role is for someone you'd like to help share the campaign with a broader audience without adding extra permissions. They can access the Communications tab in the sidebar menu for importing contacts onto your campaign mailing list only.

Patient Registration

If you plan to allow clients to register their own campaigns, customize the registration process through the Registration menu in the main campaign's sidebar panel.



Please note that if you have purchased an implementation package from PetFundr, registration requirements are discussed and set up for you.

However, settings are editable at any time.

Registration Settings

Explore the registration settings menu for what may work best for your clinic and crowdfunding expectations. Here are some of the key features and best practice suggestions:

- **Individuals vs Teams –** optimizing for one removes the other option in the registration flow. For example, optimizing for individuals removes the "Start a team" and "Join a team" options, leaving only "Register an individual." It's common for a loved one to help create, manage, and promote this campaign while your patient focuses on their health, so leaving this option as **both** is strongly recommended.
- **Require approval –** if you wish to check sub-campaigns and approve them before they launch and go live, switch this option to **Yes.** You can always pause or deny sub-campaigns even if you leave this as **No.**
- **Allow sub-campaigns to bypass registration for invited team members –** We recommend switching this to '**Yes**' as further registration isn't necessary for the patient's loved ones to help with their campaign.

Header content

The header is on the first page registrants see after clicking "Register." It shows a generic welcome message and the "Register as an individual," "Create a team," and "Join a team" options. We recommend a custom message with your logo and a nice note to patients and their loved ones who might be nervous about the medical situation and/or crowdfunding.

Registration form

By default, CoCoPay asks all registrants for their full name and email address (and if they are not the patient, they are prompted to name the beneficiary). If you require more information, such as their account number, location, etc., you may customize the registration form to include this information. The best practice is to not ask for anything you do not truly need, as this can create hesitation to register. **For help with the customization features of this form, there are comprehensive details in the ConnectionPoint Help Centre at connectionpoint.com/help.**

Compliance message

Include a waiver or agreement form in the registration process if you require one. You may write one directly on the platform or link to an outside form. A compliance message is not included by default and is not mandatory.

Confirmation message

This is the last screen registrants see before being directed to their newly created sub-campaign. By default, it is a simple 'Thank you' message with a button to review their campaign. We recommend customizing this with a picture and message to the registrant, like the header. You may also consider adding a few tips from the **Client Coaching Guide** and any information you do not want to be missed.

Fees & rewards

If you plan to charge a registration fee to crowdfund under your clinic, include it here. One is not set by default, and it is not mandatory. If you add a fee, the best approach would be to have what these fees cover in the description.

Registration page

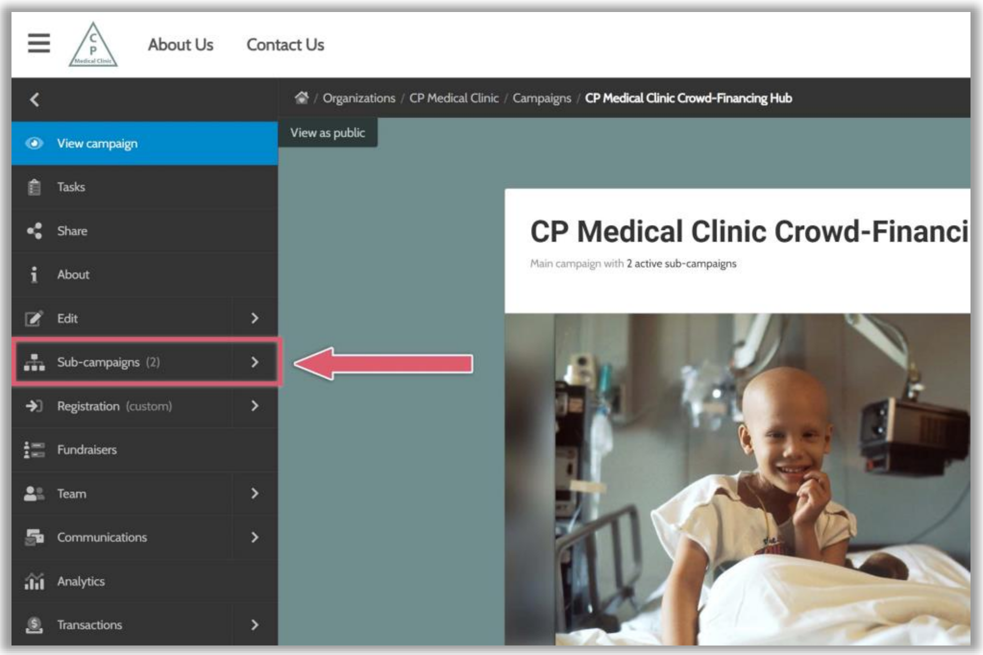
Click this tab to view your registration process. Go ahead and create a test sub-campaign if you wish – you may delete it from the Sub-campaign menu later. Please note that if you include registration fees, they won't appear in the registration flow if the main campaign has not yet been launched.

cocopay

Setting up sub-campaigns

Story and title

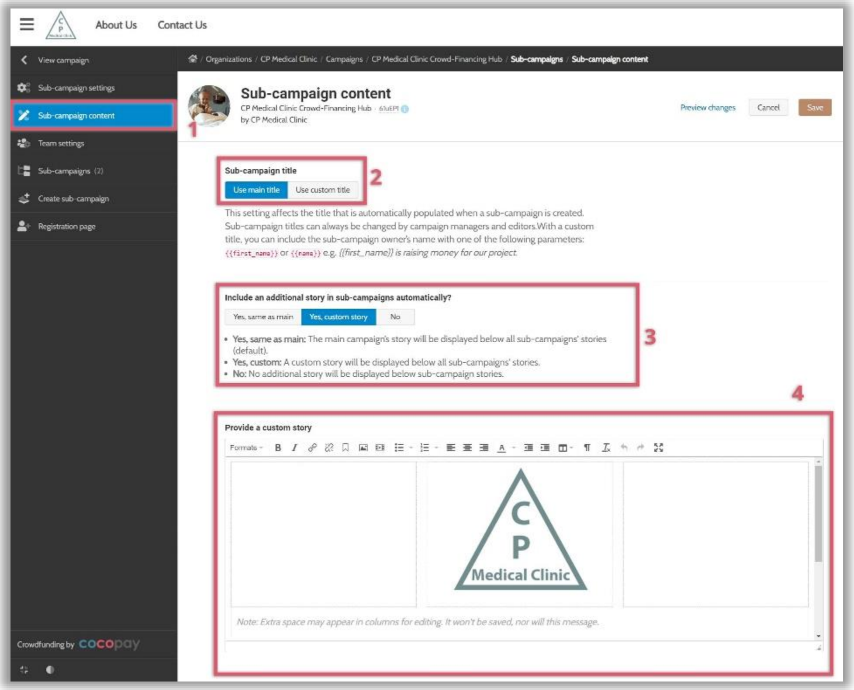
To write and edit the preset sub-campaign story, which appears at the bottom of all sub-campaigns and is unchangeable by your patients and their campaign team, click “Sub-campaigns” in the sidebar menu of your main campaign. The number indicates how many you currently have under this main campaign.



Then, under ‘Sub-campaign content’ (1), you’ll find options to write a title template (2) and include a sub-campaign story (3). You can also carry over the main campaign story or not have one. We recommend a custom story that’s shorter than your main campaign story (4).

If you template a title, the patient and their team can still change it.

(Image on next page)

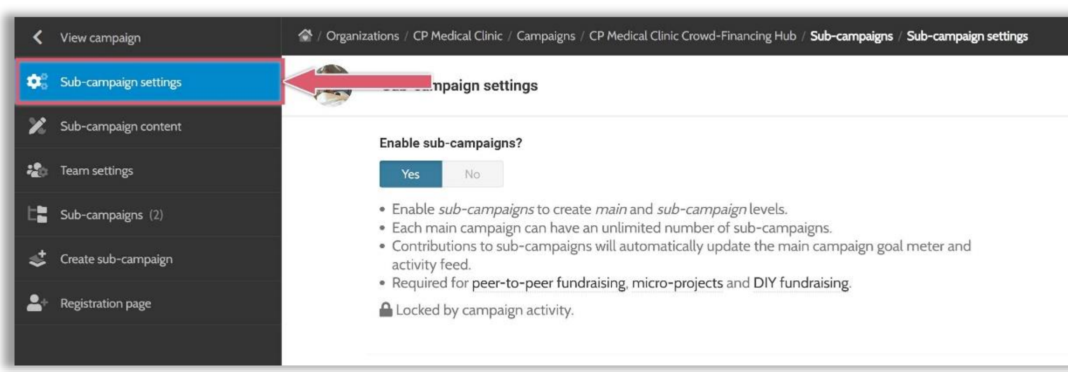


Unless you are a specialized practice providing the same treatment or service to your patients, we recommend not templating a title, as every situation will likely differ. In coaching your patient and their team, you can suggest a title along the lines of “Please help **[beneficiary]** receive the **[treatment/device]** he/she/they needs!” Another suggestion is to put in the title what the patient would like to get back to doing (specific activity, work, their family life, etc.).

Don’t forget to Save your changes in the upper right corner!

Sub-campaign settings

Review the sub-campaign settings to determine the best option for your clinic and crowdfunding expectations. These are found under ‘Sub-campaigns’ in your sidebar menu, then ‘Sub-campaign settings.’



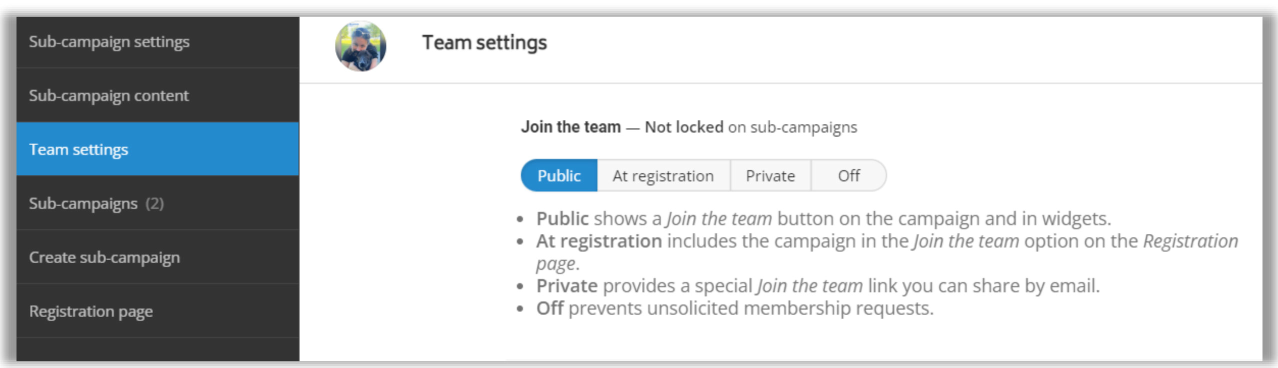
Most of these settings' defaults likely work best. A few key settings you may wish to look at include:

- **Sub-campaign goal –** Unless you have a specialized practice with standard pricing for all patients, we recommend not setting a sub-campaign goal. This allows each registrant to choose their goal based on the individual invoice and how much of it they wish to crowdfund.
- **Offline contributions –** If you do not wish to allow your patients to include offline contributions (cash or cheque, which they must reconcile directly with your administration), we recommend unchecking this box.
- **Disallow transaction viewing –** most of a campaign's contributors will be people your client knows, and transaction details contain little personal information by default. However, if you need to keep all transaction details private from your client, check this box.

Team settings

This refers to the sub-campaign team settings, not the main campaign. Most settings can stay as is unless you have reason to change them.

If you or your patients do not wish the option to 'Join the campaign team' (and help them crowdfund) to be seen, this menu contains a setting called "Join the team." Changing it from **Public** removes a banner from the sub-campaigns inviting friends and family to join the campaign to help their loved one crowdfund for their treatment.



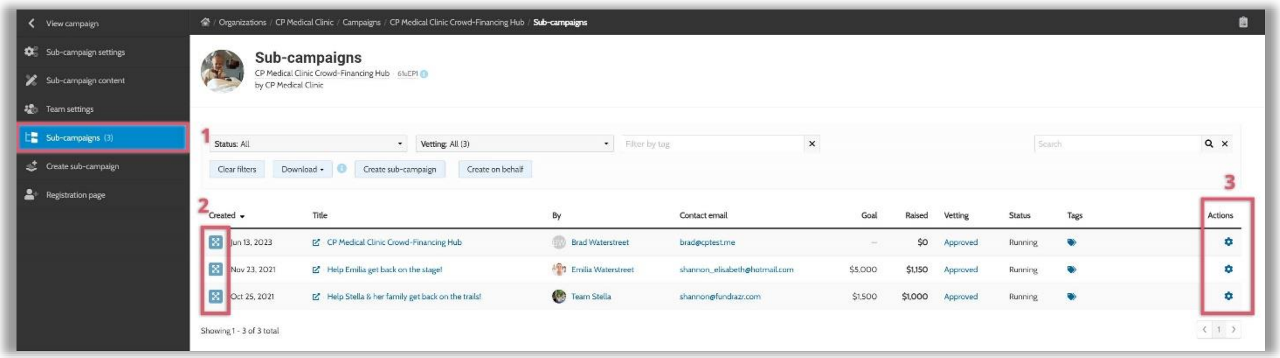
Managing sub-campaigns

Under the Sub-campaign menu in your main campaign's sidebar panel is another option, 'Sub-campaigns' (1). This is a list of all sub-campaigns under this one main campaign. In this menu, you can:

- View the funding status of sub-campaigns (how much raised vs goal),
- Approve/deny sub-campaigns (if applicable),
- Pause/restart/finish any sub-campaign,
- Delete sub-campaigns (Note: sub-campaigns with any contributions, even offline contributions, cannot be deleted),
- Create sub-campaigns,
- Filter and download sub-campaign information.

To view options for each sub-campaign, click the expand icon (2) to the left of each list item or 'Actions' to the right (3).

Please note that these tables will remove columns if you are zoomed in too close. If you cannot see a column, zoom out on your browser.

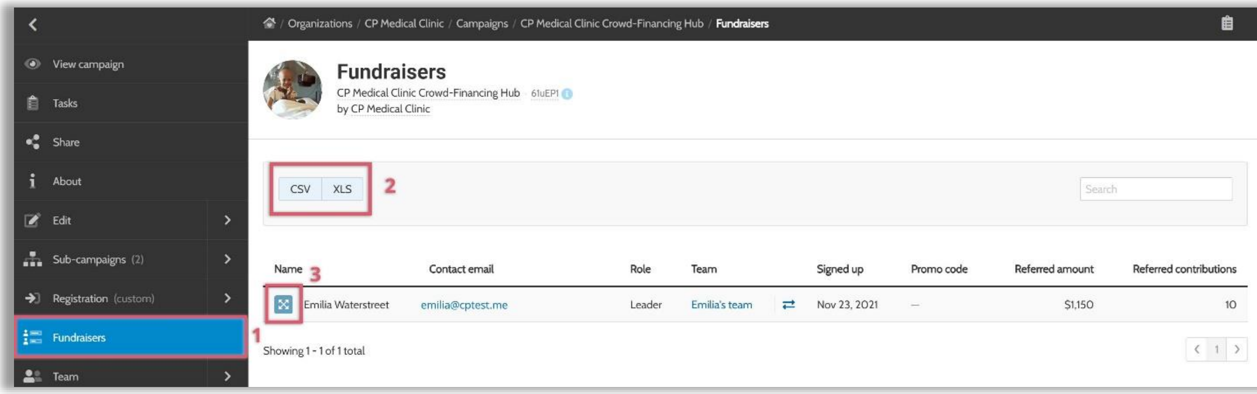


Managing individual platform users

Your patients and their loved ones' registration information is found in the "Fundraisers" menu in the sidebar panel of your main campaign (1).

If you have customized a registration form with individual details such as account number, you'll find this information **when you download this table (2).**

To view all options for managing individual users, click the expand icon (3).

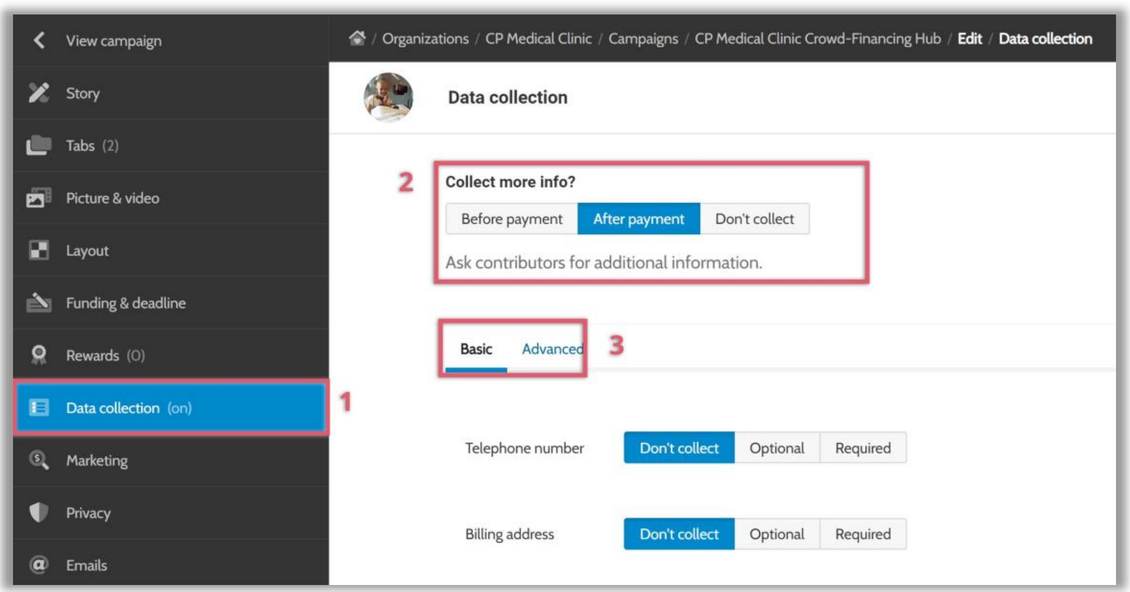


Supporter information & transactions

Choosing contributor information

CoCoPay collects full names and email addresses from all supporters to a campaign by default. If you require anything further, you may customize this information in the Data Collection menu of your main campaign.

Click 'Edit' in the sidebar menu of your main campaign, then 'Data Collection' (1). Under the heading **Collect more info (2),** choose whether to collect this information before or after the contributor has completed the checkout practice ('After' is recommended to avoid contributors backing out). Toggle the info you want to collect from this menu or customize fields by selecting 'Advanced' (3).



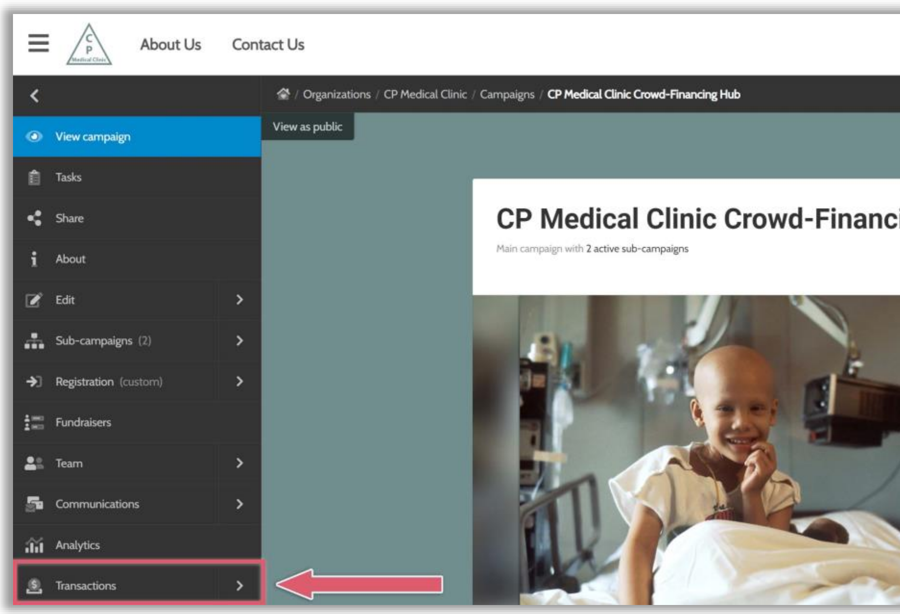
IMPORTANT: Do not ask for information you do not truly need. Doing so may cause potential supporters to hesitate to contribute, affecting your patients' success.

Viewing contributor information and transactions

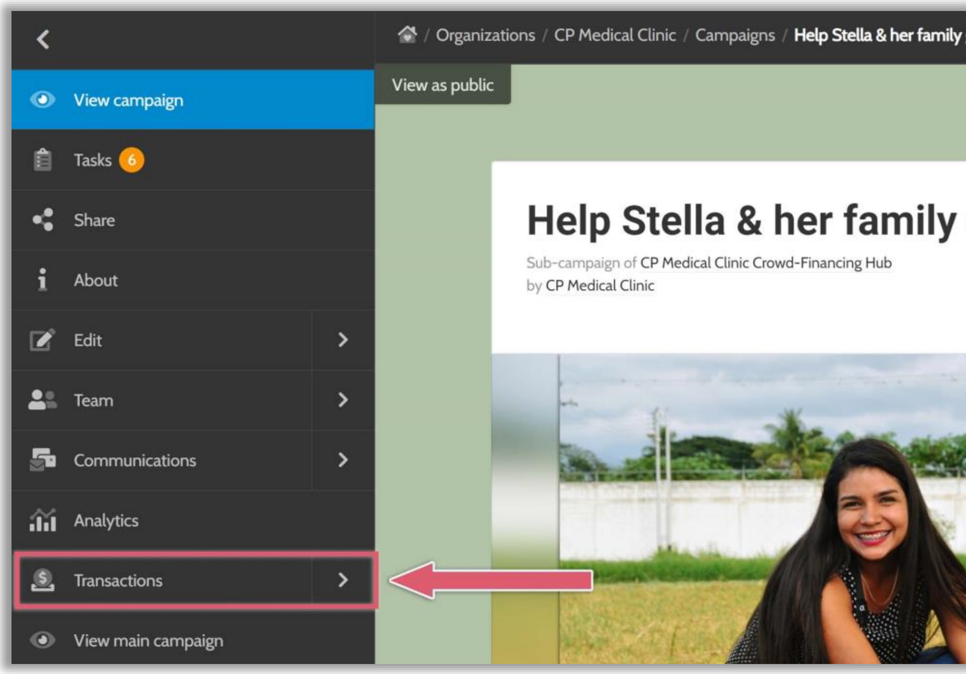
There are three places to view your transactions:

1. View ALL transactions processed through your practice in your organization profile. Click 'Transactions' (1) in the sidebar menu of your organization profile. To view extra contributor information such as that you've customized, you must download the list (2) in the format of your choice.

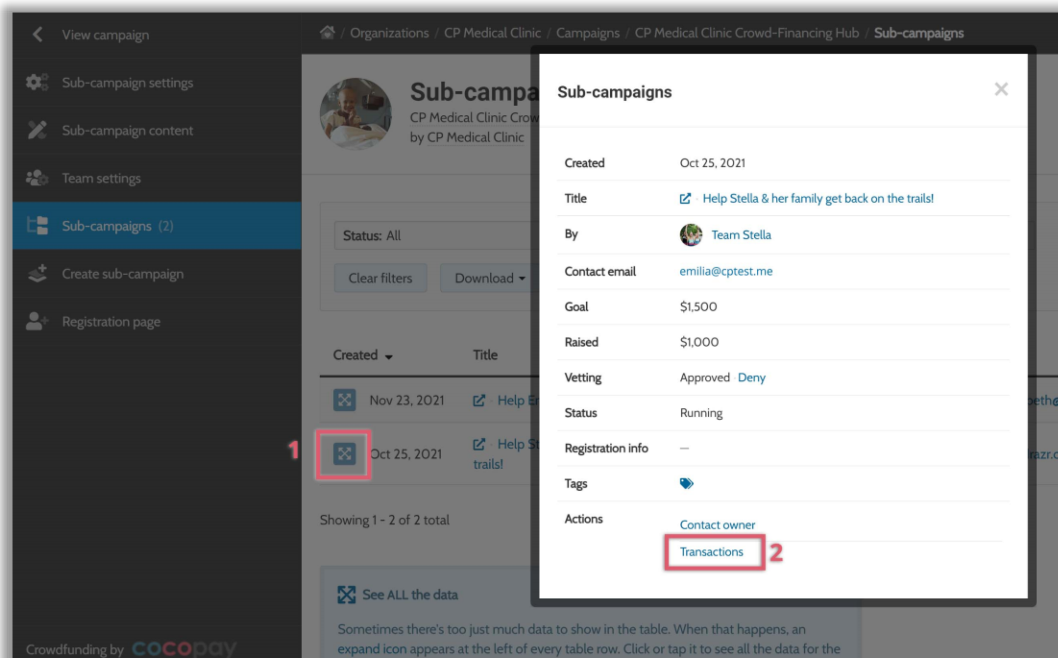
2. View transactions for one main campaign, *including all sub-campaigns*, using the Transactions menu in the sidebar menu of that campaign. As with the organization transaction menu, you must download the transaction list to view customized information.



3. To view transactions for a specific sub-campaign only, you can either:
    a. Click 'Transactions' in the sidebar menu of the sub-campaign,



    b. Or click 'Sub-campaigns' in the sidebar menu of the *main campaign*, then under the expand icon beside the sub-campaign list item (1), you'll find a 'Transactions' option (2).

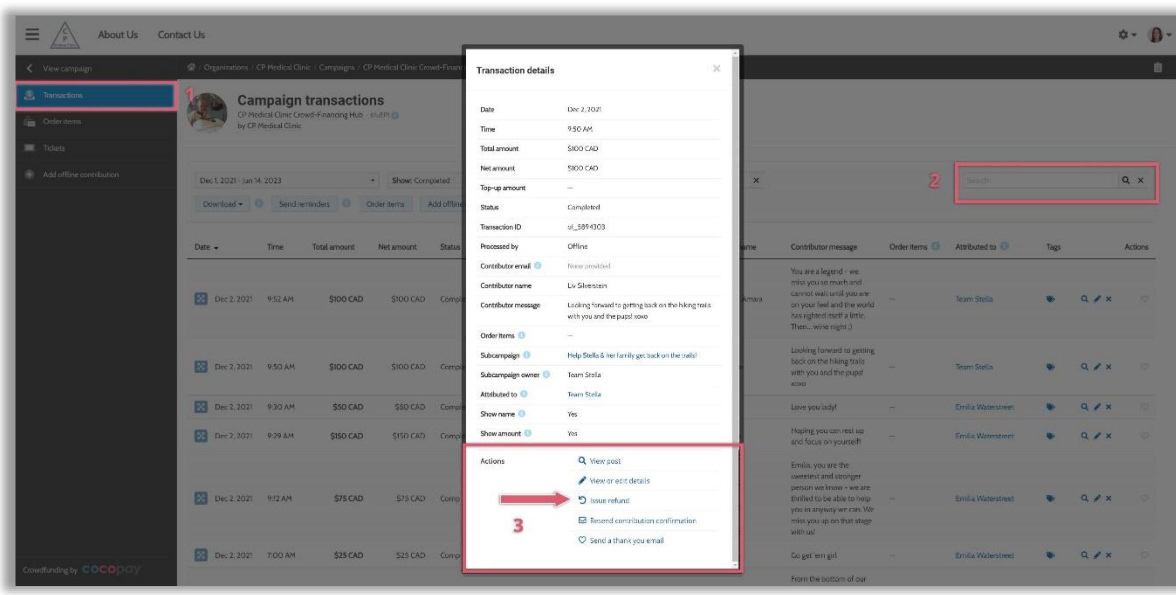


Issuing refunds

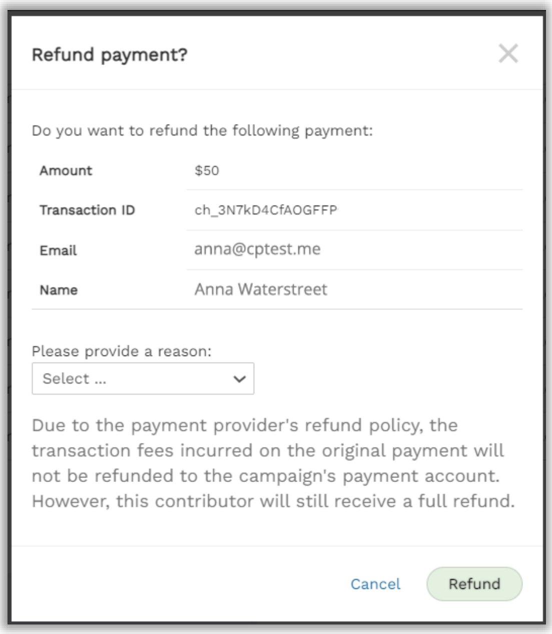
If required, you may issue refunds to supporters directly from the campaign. However, there are a few important notes:

- Refunds can only be issued directly from the platform for transactions less than 30 days old. For transactions older than 30 days, refunds must be made from the Stripe or PayPal account in question (Depending on the account, you might have upwards of 60 days, so checking on the platform before you contact Stripe or PayPal is recommended.)
- Payment processing fees through Stripe will be reversed as part of the refund through the platform.
- Payment processing fees through PayPal will NOT be reversed as part of the refund through the platform. PayPal has different procedures than Stripe. o The total amount will still be refunded to the supporter at a loss to your account.
  - To recoup these fees, you must contact PayPal directly. PetFundr cannot access your PayPal account, nor can we make changes on your behalf.
  - Any fees or top-ups to PetFundr (if applicable) will be refunded.
  - Sub-campaign owners (your clients) cannot issue refunds.

To issue refunds, view the transaction using one of the methods described in the previous section. You can always search for the supporter's name (1) if needed. Click the expand icon (2) in the appropriate line. Then click 'Issue refund' (3).



You will then see a confirmation window where you'll insert a reason for the refund.

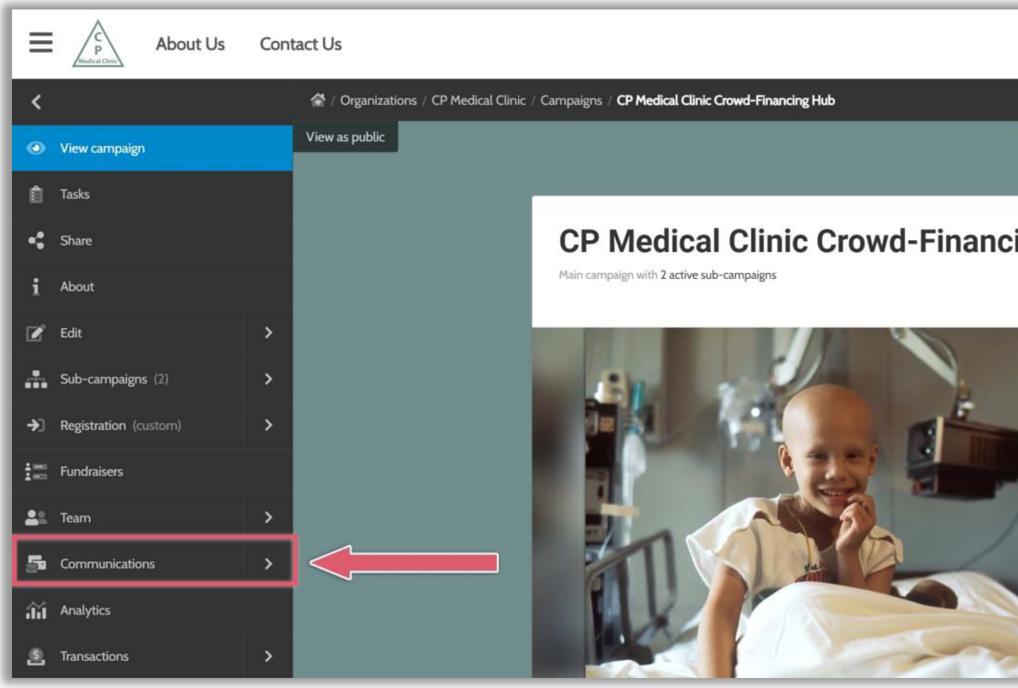


Customizing emails

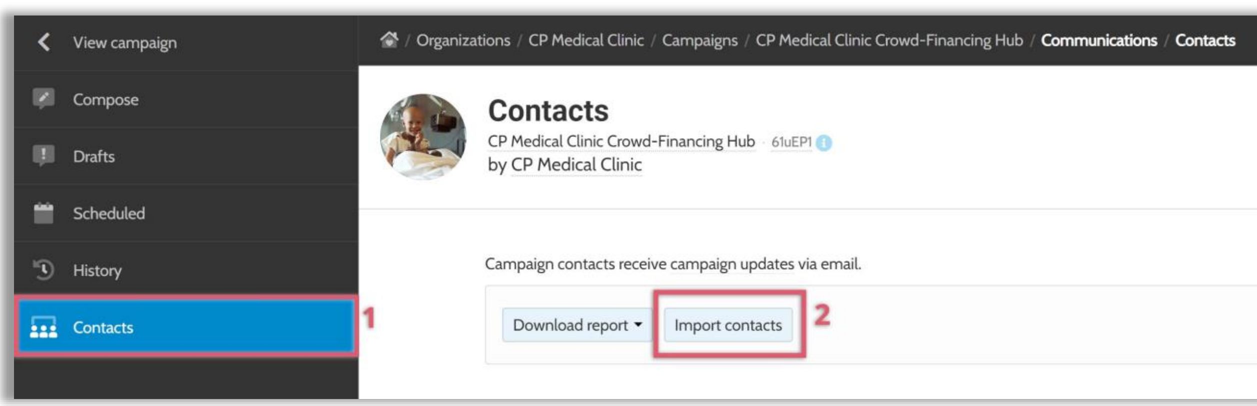
Campaign notification email

This email is sent to anyone imported onto the campaign's contact list (whether the main campaign or a sub-campaign). One-off links can be quickly sent using the email button on the campaign's share bar, but to invite multiple people to see your campaign, we recommend using your Communication Center. While the entire notification email isn't customizable, you (or your patient and their team) may customize a personal message alongside it.

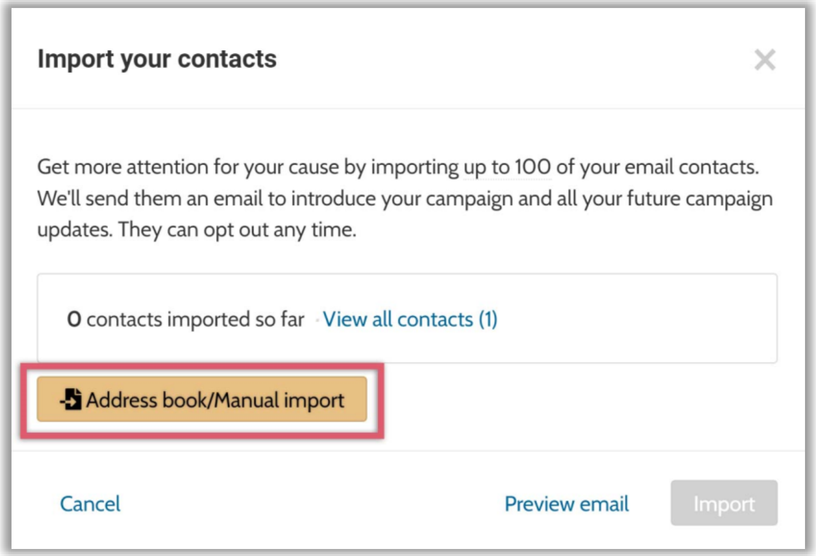
Click 'Communications' in the sidebar panel of the campaign in question.



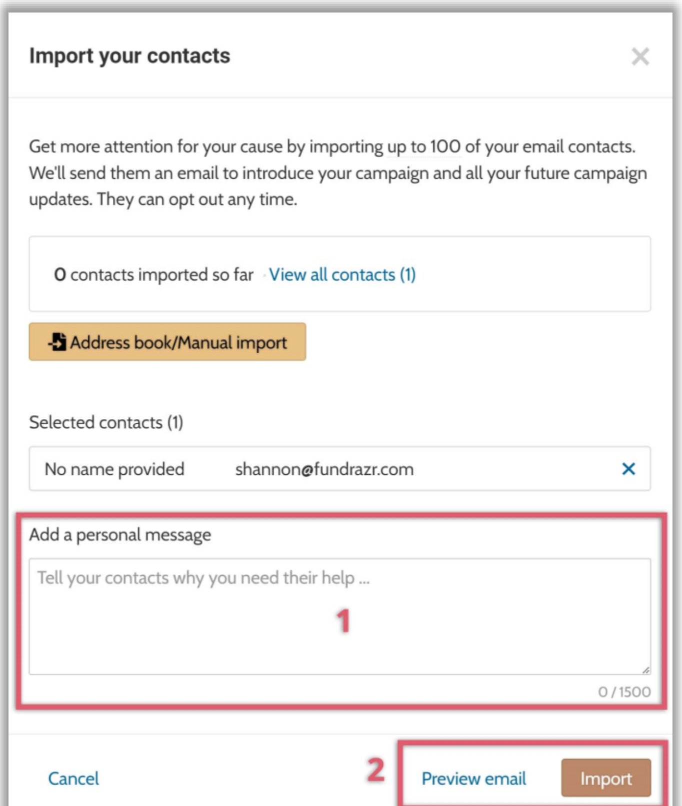
Then, click 'Contacts' (1) and 'Import contacts' (2).



Click ‘Address book/Manual import’ and import at least one contact to view the custom message feature.

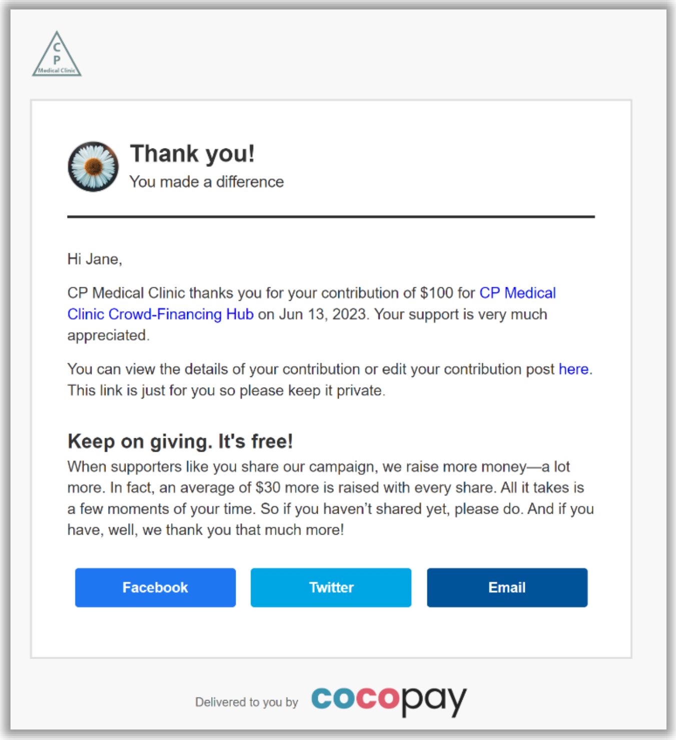


Write your personal message in the new space that appears (1), then preview and click ‘Import’ (2) once you’re satisfied. If your campaign is launched, this email will be sent immediately. If the campaign is NOT launched, the email will be sent as soon as you’ve chosen to launch it.

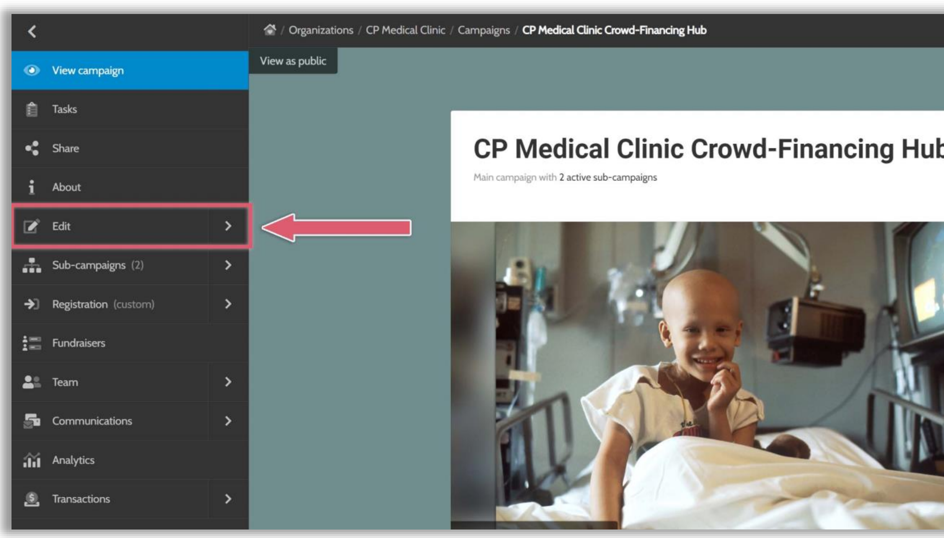


Contributor payment confirmation email

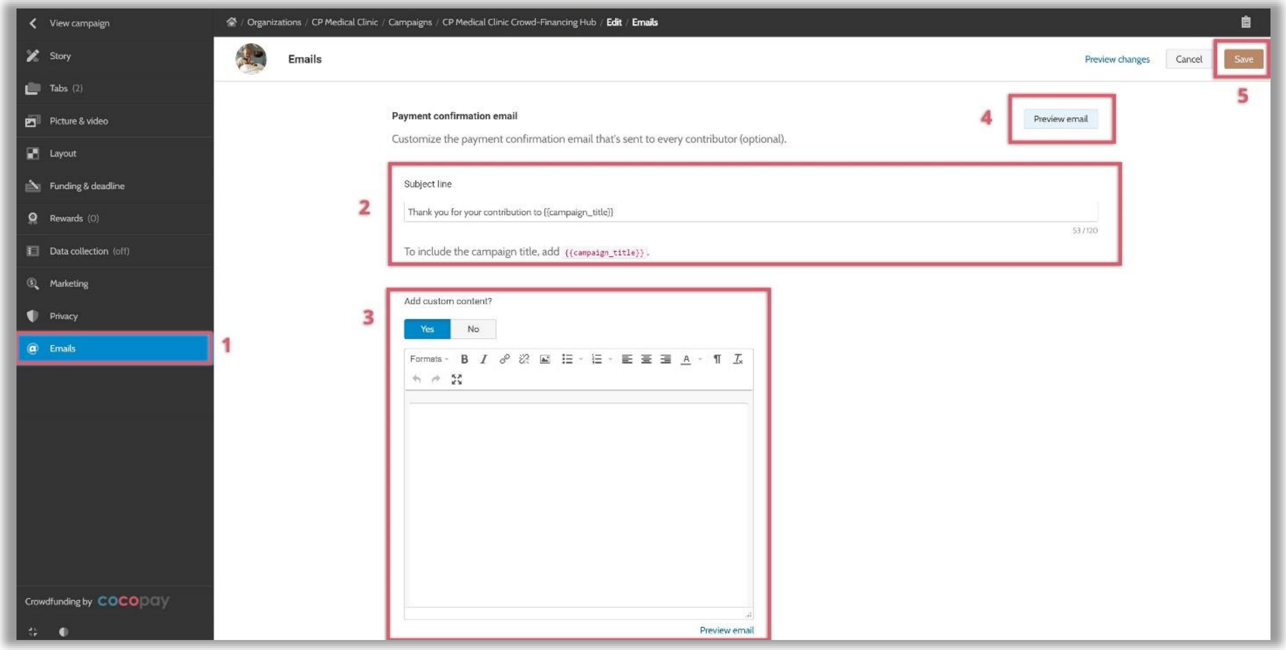
Every contribution to a main or sub-campaign under your organization profile receives this email. Without further action, it will look like this (with your clinic's branding as customized in the Theme menu of your organization profile):



If this looks good to you, you don't need further action. If you would like to customize a message for all contributors, you can do so in the 'Edit' menu of the main campaign.



Then, click ‘Emails’ (1), edit the subject line if you like (2), then click Yes to ‘Add custom content?’ (3). To view your changes, click ‘Preview email’ (4). Don’t forget to save (5)!

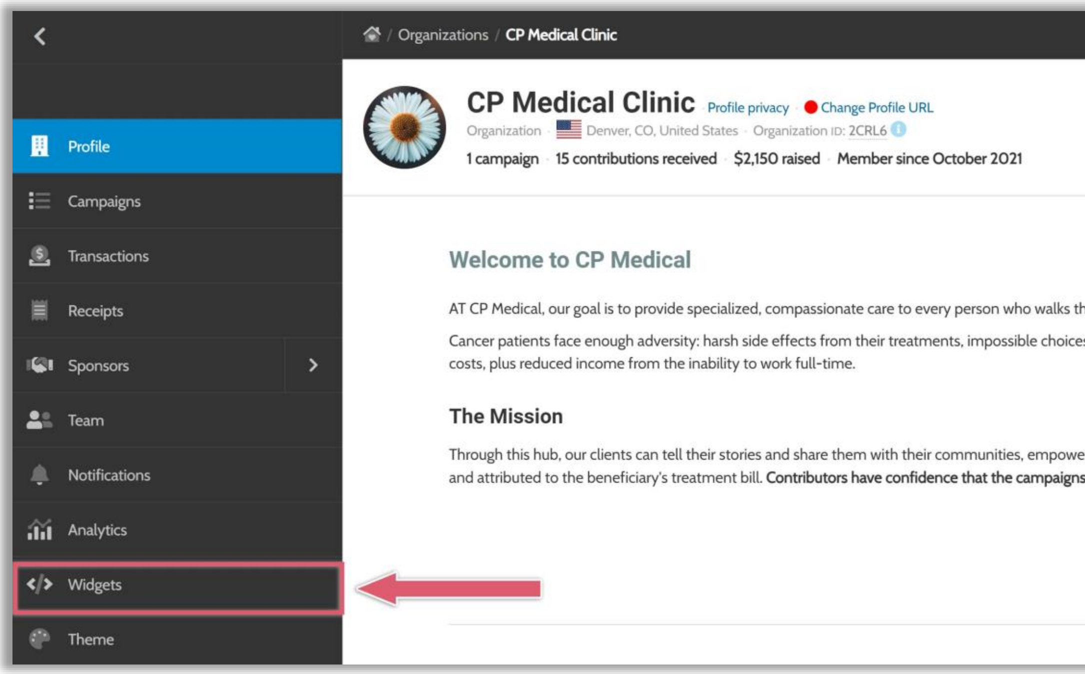


SmartWidgets

Embeddable widgets can be customized so your clinic can promote campaigns or registration on an outside website.

Under your organization profile, customize widget options to generate scripts to insert badges and contribution buttons linked to the campaign and automatically update with funds raised.

In your *organization profile*, click “Widgets” in the sidebar menu:

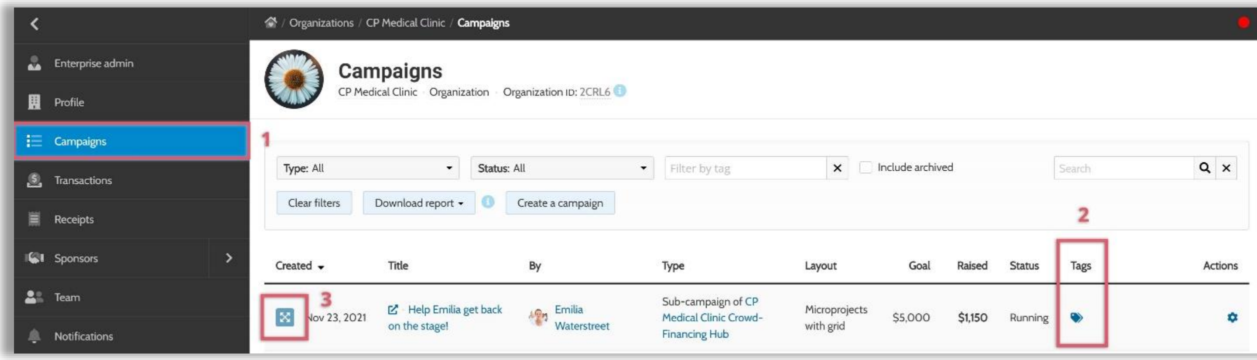


There are many available widget types to choose from:

- **Create campaign link** enables visitors to create a campaign without leaving your site.
- **Badge** shows a single campaign of your choice in compact format.
- **Grid** shows your choice of campaigns in a grid of badges.
- **Carousel** shows single row of automatically changing campaigns. A great option for displaying many campaigns in a small space.
- **Leaderboard** shows a list of campaigns ranked by funds raised. A great option for displaying sub-campaigns.

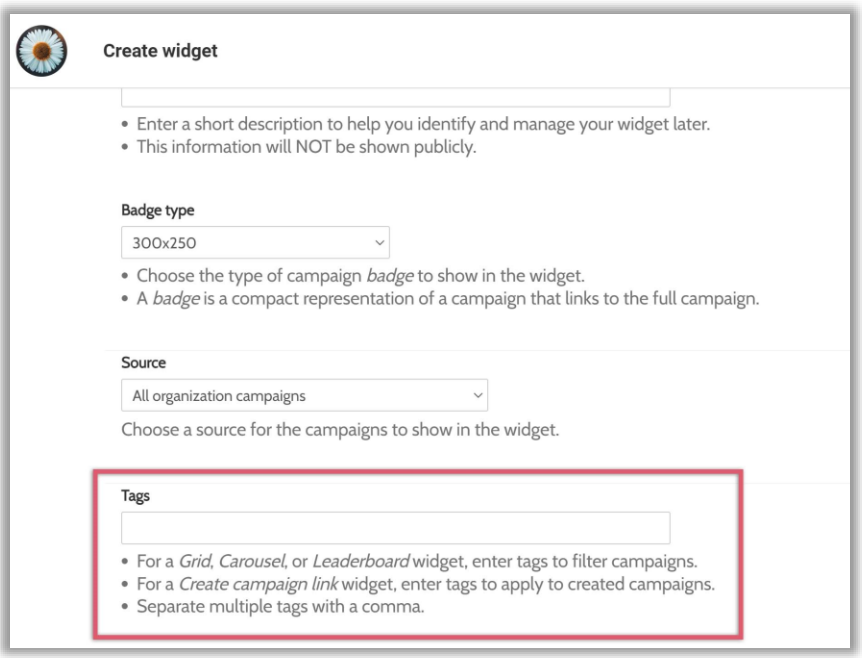
You can create ' Tags ' if you only want specific campaigns to appear within your widget.

To tag a campaign, go to your campaigns option in the sidebar menu of your *organization profile* (1). Under the “Tags” column, click the icon next to the campaign you want to tag (2):



Note: If you cannot see the “Tags” column, zoom out of your browser, or click the square arrow icon (3 in the above picture) to open the expanded menu for the chosen campaign.

Tag the campaign(s) you want to be added to the widget with a common word. Then put this word in the “Tags” option of your custom widget:



FAQs

We do not want our clients registering themselves/We only want them to register once we give the go ahead. Can we remove the registration button and provide a private link instead?

Can I have the Registration button on, but screen who registers?

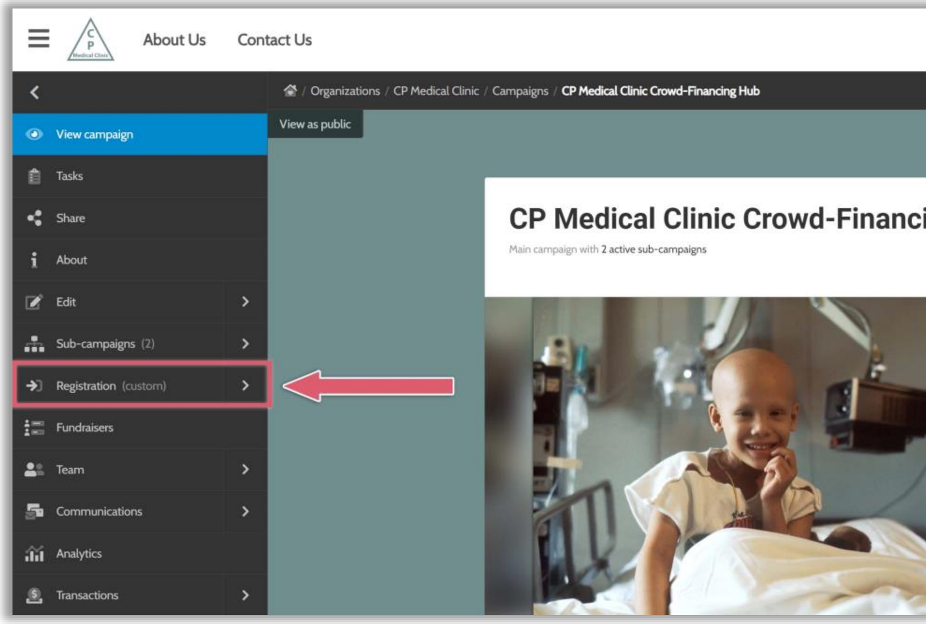
Why is the endorsement banner showing the wrong name?

How can I delete a sub-campaign?

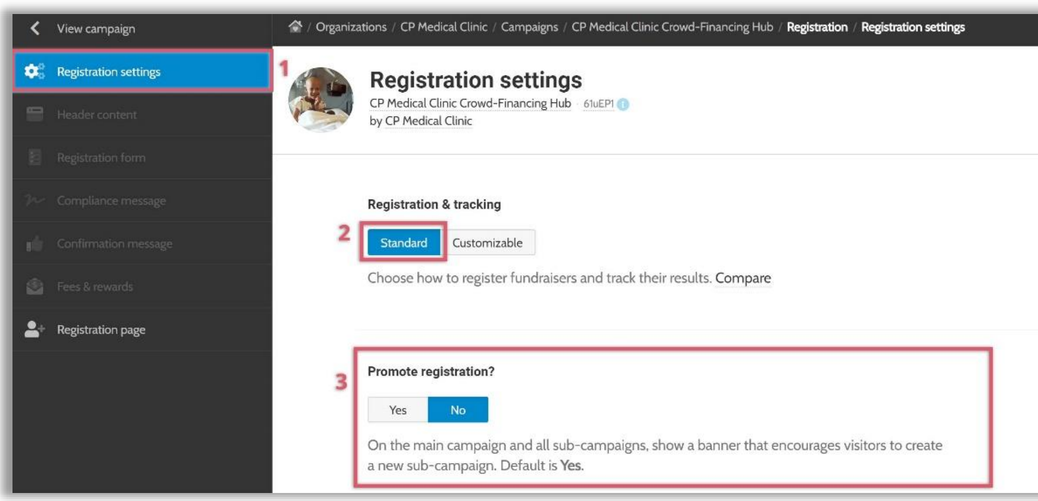
How do we know when a sub-campaign is funded?

We do not want our patients or their loved ones registering themselves/We only want them to register once we give the go ahead. Can we remove the registration button and provide a private link instead?

You may eliminate the registration button under the **Microproject** layouts (grid or leaderboard), *not* other multi-tier layouts like DIY. Check the layout (see page 10); then click the "Registration" option in the sidebar menu:

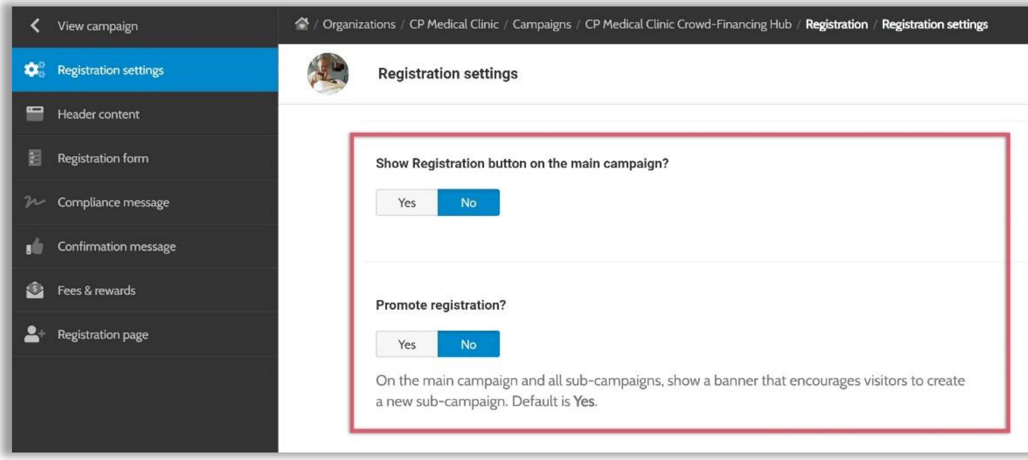


Then, under settings (1), you'll notice two options for "Standard" and "Customizable" (2). Under ***Standard***, ensure the option to "Promote registration" (3) is set to "No":



(Continued on next page)

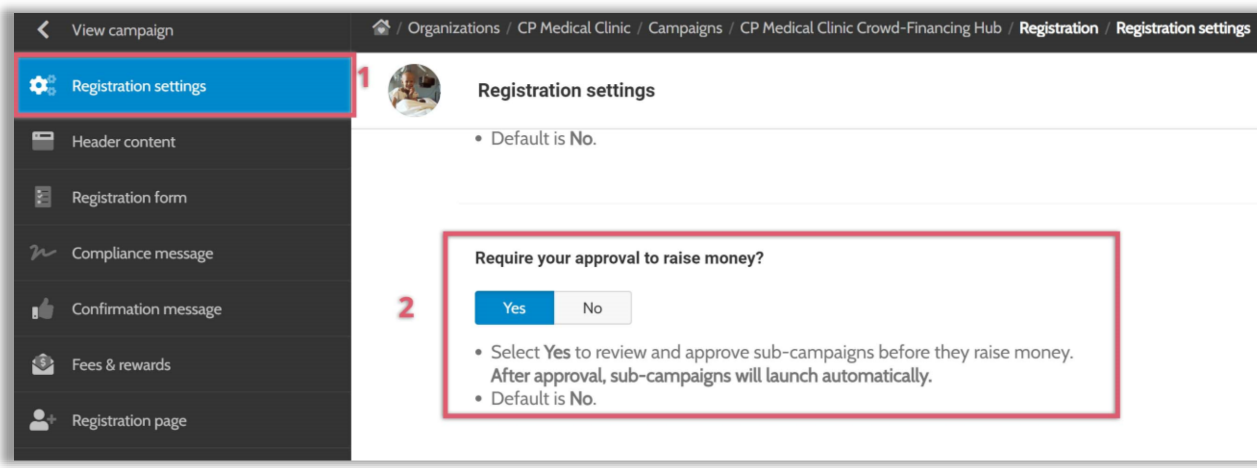
Under *Customizable*, you'll see the same promotion option, plus another to remove the "big registration button" from the main campaign:



Then to privately invite registration, click on 'Sub-campaigns' in the sidebar menu of the main campaign and ***right-click*** 'Create a sub-campaign.' Please copy the link address and send this link to your client to register their sub-campaign. Or click on 'Create on behalf' to start the process for them and have the platform email your client for you.

Can I have the Registration button on, but screen who registers?

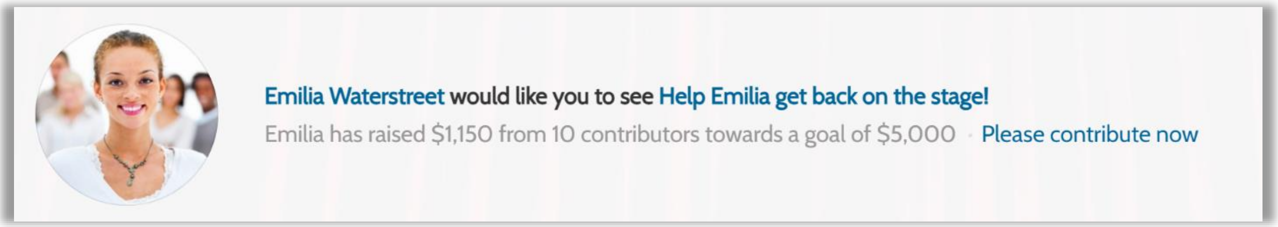
Yes. You can change the settings to require your approval before a sub-campaign goes live. Go to the Registration menu in your main campaign, then in Registration Settings (1) scroll down to 'Require your approval to raise money' (2):



Why is the endorsement banner showing the wrong name?

The endorsement banner is linked to a unique reference code in the URL of a campaign. Each CoCoPay (ConnectionPoint) user account has a unique code. It is written at the end of a campaign URL, starting with '?ref=ab_' and followed by six random letters and numbers. Those six characters are your reference code.

If someone shares a link with a user account, the banner shown at the top will either show the endorsement given by the fundraiser or a standard message of reference:



This allows for added confidence that a followed link relates to someone the sharer knows. When a fundraiser shares the sub-campaign via one of the media sharing links or copying and pasting from the browser, they target their community and therefore want their endorsement at the top.

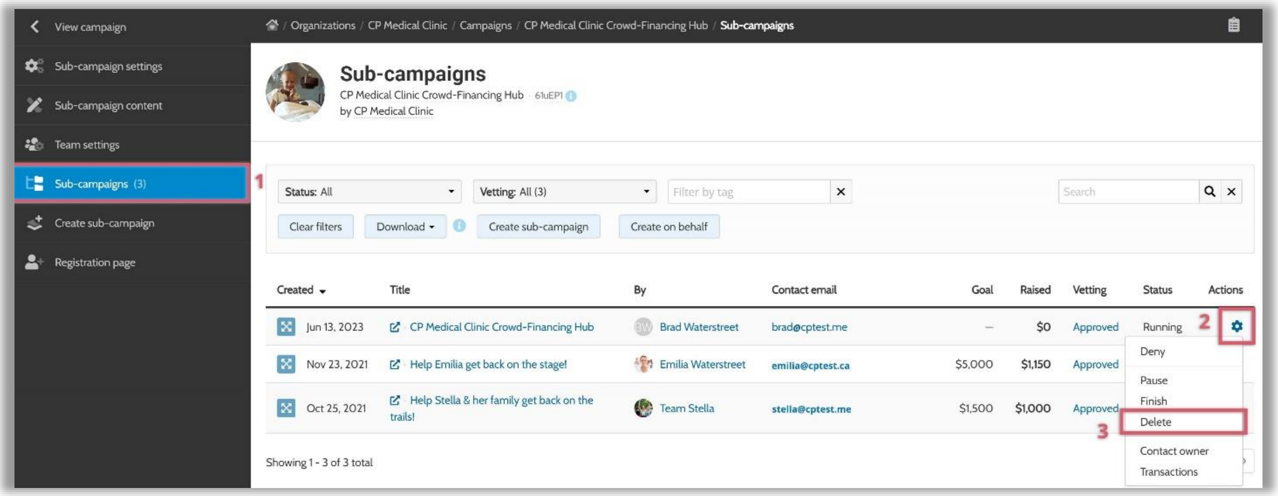
Suppose a non-team member shares the campaign to support the beneficiary further. In that case, they are targeting a separate community – their own –allowing that community to understand that non-team member's interest and involvement.

Confirm the reference code is correct to ensure the right person's message appears when creating a link to your campaign.

Tip: your browser will automatically remember the first reference code it sees. If you still see the wrong endorsement message after altering a link, clear your cookies or open the link in your browser's private/incognito mode.

How do I delete a sub-campaign?

From your main campaign, go to your Sub-campaigns menu and click “Sub-campaigns” (1). You’ll see a list of sub-campaigns, each having a gear icon in the far-right column (2). The delete button is here.



Tip: Can’t see the gear menu? Zoom out of your browser or click the expand button.

Tip: Can’t see the delete option? You cannot delete a sub-campaign that has funds attached to it! Speak to your contact at CoCoPay to discuss options.

How do we know when a sub-campaign is funded?

You may check a sub-campaign's funds raised versus its goal in your Sub-campaign menu in the sidebar panel of the main campaign. There are two columns labelled "Goal" and "Raised" that you may compare.