



PetFundr's mission is to reimagine funding for animal shelters, rescues, sanctuaries and more. We help nonprofits and animal lovers alike to engage their communities and increase access to quality animal care.



## Animal Welfare Organization Toolkit

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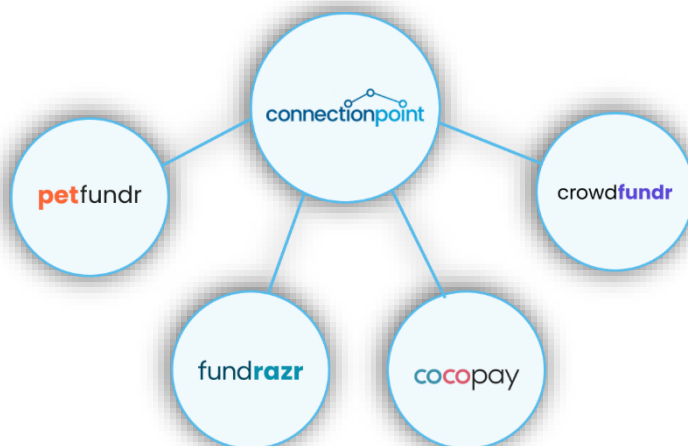
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## Welcome!

Welcome to PetFundr – a ConnectionPoint Systems Inc. platform.

The ConnectionPoint family has been 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 a positive impact via crowdfunding.

PetFundr brings the same excellence in innovation, functionality, and customer-first approach to ensure all animal lovers – whether shelters, sanctuaries, rescues, service animal trainers, and everyday animal parents – help fund access to high-quality care and the chance at a better life.

This guide will give you everything you need to start your organization with a customized PetFundr crowdfunding profile and campaigns.

## Checklist: What do I need to get started?

- ❑ Organization logo (PNG format)
- ❑ Branding colour palette and font details
- ❑ Staff contacts (specifically, the emails of those in your organization requiring administrative access to your campaigns)
- ❑ Pictures, videos, and other media
- ❑ Motto, mission, and other communications you'd like featured on your PetFundr 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 (except payment processing) will be done for you!**

# Get to know PetFundr

## Organization profile (administrative view)

**1** Our Services Contact

**3** [User Profile]

**2** Organizations Misty Meadows Animal Rescue

**4** Enterprise admin  
 Profile  
 Campaigns  
 Transactions  
 Receipts  
 Sponsors  
 Team  
 Notifications  
 Analytics  
 Widgets  
 Theme  
 Settings

**5** Misty Meadows Animal Rescue Profile privacy Change Profile URL  
 Verified organization Vancouver, BC, Canada Organization ID: 4EkZ8  
 Member since May 2023

**6** Misty Meadows Animal Rescue  
 A sample organization for demonstration purposes

**7** Organization campaigns  
 Bring quality care to our furry, scaley, and feathery family members!  
 The Crowd Financing Option Through crowd-financing with PetFundr™ families collaborate with their social networks to provide a beloved pet with the veterinary care they need. The family (or a helpful friend) registers a crowdfunding campaign and shares...

**8** Organization activity  
 Please help us fund the surgery Bean needs to play with his boy again! reached a milestone  
 Milestone 8 minutes ago  
 First contributor

Crowdfunding by petfundr

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 © 2023 Misty Meadows Veterinary Hospital  
 Powered by ConnectionPoint®

1. **Header** – customizable logo, navigation links, and colour.
2. **Breadcrumbs** – 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** – Including location, verification status, and organization I.D. number.
6. **Public organization profile** – see your campaigns' most recent activity (contributions, updates, etc.).
7. **Organizational campaigns** – list of current campaigns (most recent on top).
8. **Activity feed** – Recent campaign contributions and updates.



## Campaigns

### Types

You may choose from two campaign types on PetFundr: *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 projects that can use any funding received, even if the goals aren't reached.

#### 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).

All-or-nothing campaigns are the best option when a project requires ALL funds to move forward. 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 PetFundr or the payment processor.

## Layouts

There are multiple layouts available in PetFundr; however, there are two common layouts for animal nonprofit organizations:

- **Do-it-yourself campaign** – Let your community help you raise funds! A **main campaign** is run by the nonprofit, telling the overall story of their mission. Then, keen advocates can register their campaigns, called **sub-campaigns**, to run so they can raise money for your nonprofit. All funds raised are sent directly to your organization accounts, and you may choose to send tax-deductible receipts automatically.
- **Microproject with grid campaign**. Break a large project down into smaller asks or run one main campaign that showcases different animals' sub-campaigns for their various needs. **Sub-campaigns** are created by the nonprofit with the ability to add other team members, such as volunteers, to help run the campaigns without providing access to sensitive or personal information. The **main campaign** can also receive funds if you choose.

## Main campaign example (public view)

**Misty Meadows Animal Rescue** Our Services Contact Sign in

**Campaign title**

**Bring quality care to our furry, scaley, and feathery family members!** Main campaign support button

**Contribute**  
Share and you'll help this campaign raise more money.  
Social sharing options

**Story tabs**

Welcome to Misty Meadows Animal Rescue

Pick-a-Pet-Page!

Here at MMVH, we understand how deeply animals can integrate themselves into our families. No matter what size, shape, or how big the family is - our pets are beloved, important, and deserving of the best possible veterinary care.

**The Crowd funding Option**

Through crowd-financing with PetFundr™ families collaborate with their social networks to provide a beloved pet with the veterinary care they need. The family (or a helpful friend) registers a crowdfunding campaign and shares it via email, social media, or direct messages. They craft a story about how this treatment will help their pet, then collect contributions from those in their networks who wish to help with the cost.

**What happens when I click 'Contribute'?**

People contribute using a credit card, bank card, or PayPal account. The campaign runs for a set time, and the funds go directly to Misty Meadows Veterinary Hospital. PetFundr also coaches families to provide the best opportunity for success.

**MMVH & PetFundr both have the same goal to provide exceptional veterinary care to beloved animal family members who need them without adding further fees.**

When you contribute, you will see an option to also pay for the fees associated with processing your contribution, which helps the family even more and contributes not only to PetFundr keeping their platforms operational but also helps keep their coaching services free for families. Through your generosity, more families get the financial and physical help and support they need to bring their pets the medical treatment they need without risking hundreds (or even thousands) of dollars in interest charges.

For more information, check out the [FAQ](#) and the [About Us](#) tabs.

**Campaigns**

Showing 1 of 1 [Show mine](#)

**Sub-campaigns**

**Please help us fund the surgery Bean needs to play with his girl again!**  
by Misty Meadows Veterinary Hospital  
Lovable Bean needs surgery! To all our friends and family - Bean came to our family four years ago when our daughter Maia was 6. He helped our shy little girl come out of her shell, and...

\$350 raised 2 hours running [View](#) [Contribute](#)

**Bring quality care to our furry, scaley, and feathery family members!**  
by Team Jupiter

\$0 raised 19 days running [View](#) [Contribute](#)

No more results to show


Crowdfunding by **petfundr**

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## Sub-campaign example (public view)

Misty Meadows Veterinary Hospital
Our Services Contact
Sign In

**Please help us fund the surgery Bean needs to play with his girl again!**



**\$350** raised

6% of \$6k goal

2 contributors

21 hours remaining

[Contribute](#)

Facebook Twitter LinkedIn Reddit StumbleUpon Print Share

Story
Highlight
FAQ
About Us
Updates
Amnesty
Funders

**Lovable Bean needs surgery!**

To all our friends and family -

Bean came to our family four years ago when our daughter Mala was 6. He helped our shy little girl come out of her shell, and many of you saw the changes he brought out in her. She is happier, more confident, and he helps her get outside and be more active and social.

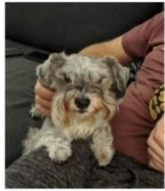
But Bean has been slowing down in the last couple of months, way too early for his age. A scan should Bean has a tumour on his right lung, and it's growing fast. Our wonderful vet, Dr. Mirica, is confident it can be extracted.

Unfortunately, we do not have pet insurance, and the cost of the surgery is quite prohibitive for our family at this time. My husband and I get by, however, our income isn't large and the flooding last year took a toll on our home and our finances.

We need to do this for Mala as much as we need to do it for Bean. He is a cherished part of our family, has brought so much and asks for nothing in return but love and, occasionally, pizza crusts.

Unfortunately, we do not have pet insurance, and the cost of the surgery is quite prohibitive for our family at this time. My husband and I get by, however, our income isn't large and the flooding last year took a toll on our home and our finances.

We need to do this for Mala as much as we need to do it for Bean. He is a cherished part of our family, has brought so much and asks for nothing in return but love and, occasionally, pizza crusts.



One way or another, we will make this work. But even a little bit of help will take pounds of stress off of us. If you cannot help at this time, we completely understand! Please consider sharing this campaign with others if you see any help would be amazing.

**With love:**

Pippa, Leo, Mala, and Bean

**The Crowd Financing Option**

Through crowd financing with PetFundr™ families collaborate with their social networks to provide a beloved pet with the veterinary care they need. The family (or a helpful friend) registers a crowdfunding campaign and shares it via email, social media, or direct messages. They craft a story about how this treatment will help their pet, then collect contributions from those in their networks who wish to help with the cost.

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For more information, check out the [FAQ](#) and the [About Us](#) tabs.

**Highlights** [See all activity 2](#)

Write a comment ...



**Jane Smith** contributed \$100

28 hours ago

For Bean

[Like](#) [Comment](#) [Share](#)

Crowdfunding by **petfundr**

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Sub-campaign Title

Funding & Deadline Stats

Social Sharing Options

Sub-campaign Story - Beneficiary Content

Sub-campaign Story - Organizational Content

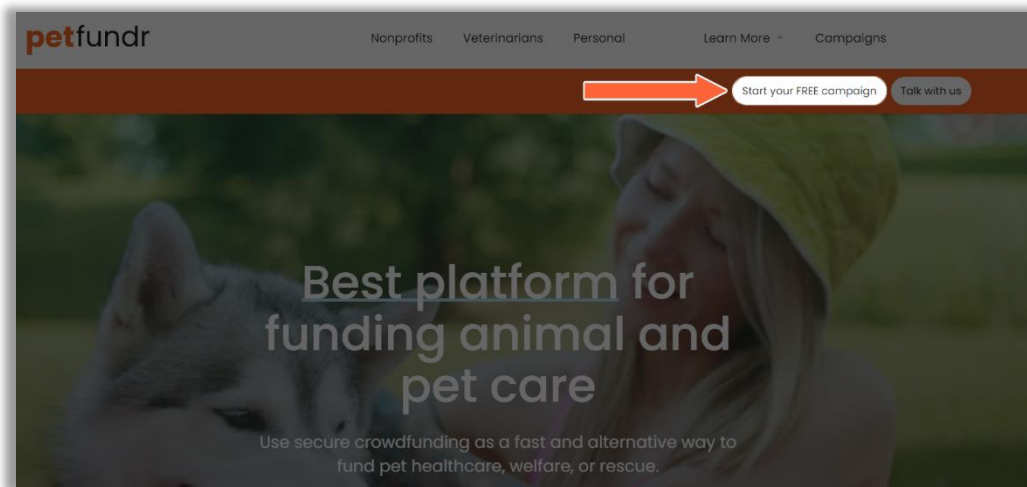
Activity Feed

Custom Story Tabs

Activity Feed

## Getting started

To create your organization profile and first campaign in PetFundr, visit <https://petfundr.com/create> or click the “Start your FREE campaign” button on our homepage.



Choose “An organization” when answering “Who is the money for?”.

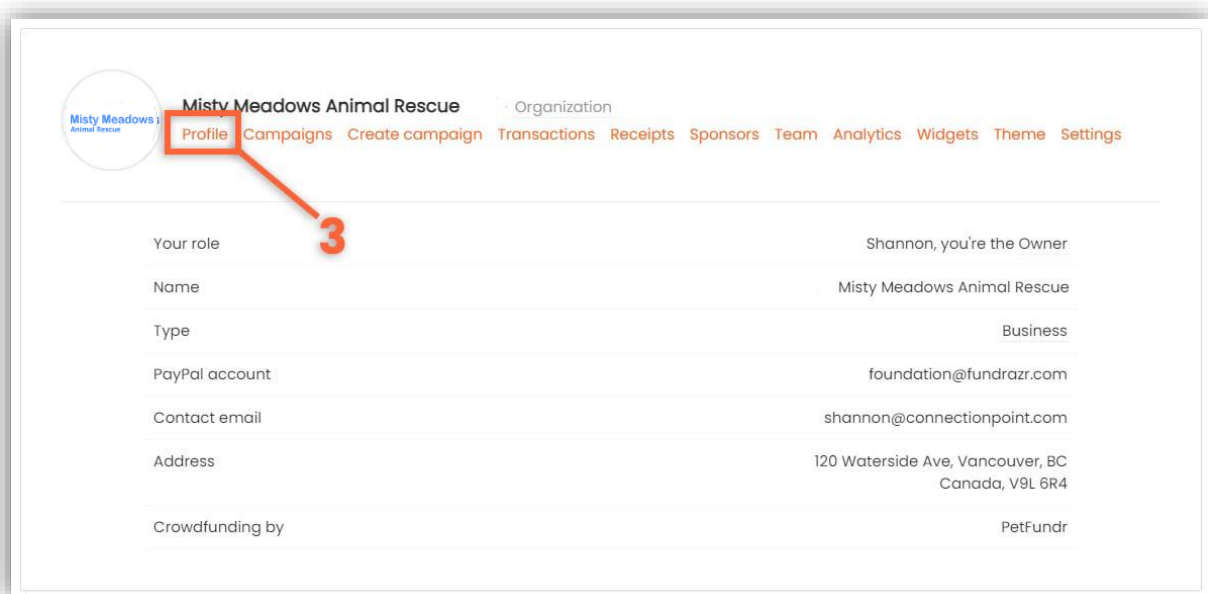
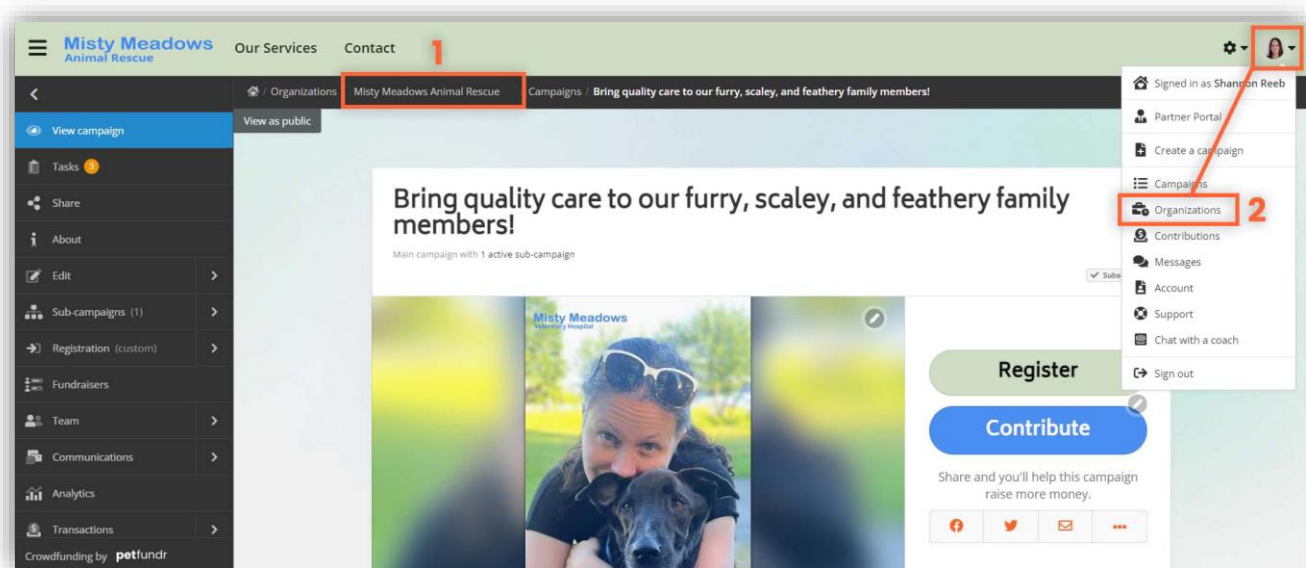


Fill as much or as little as you like in the campaign creation flow. You can update and change things later (**except for campaign type, so make sure you know whether keep-it-all or all-or-nothing is best for you**). Once finished, the window will open on your new campaign template.

## Customizing your profile

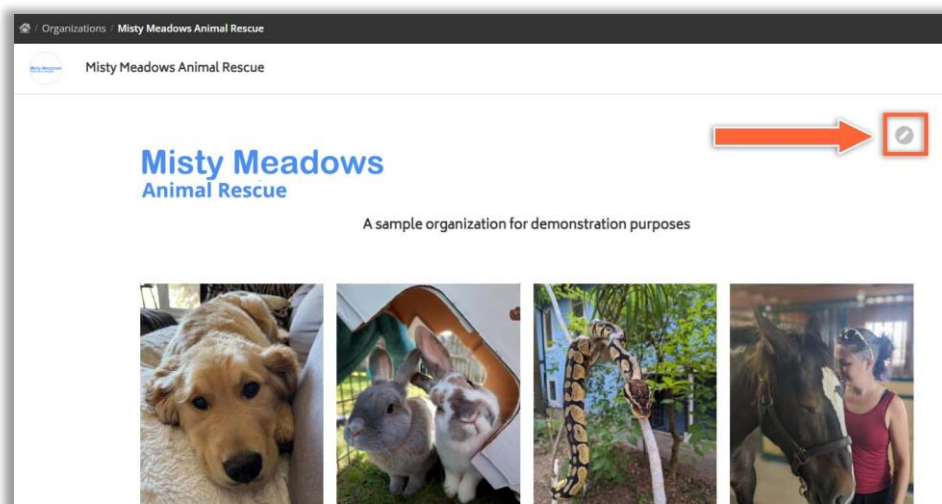
Your PetFundr organization profile and campaigns are customizable. Customizing the public profile, header, logos, font, and colours creates a smooth transition between your website and PetFundr and enforces brand recognition for your nonprofit.

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](https://connectionpoint.com/help) and search for "Navigating the Story Editor." Suggestions for content are found on [page 27](#) of this guide.

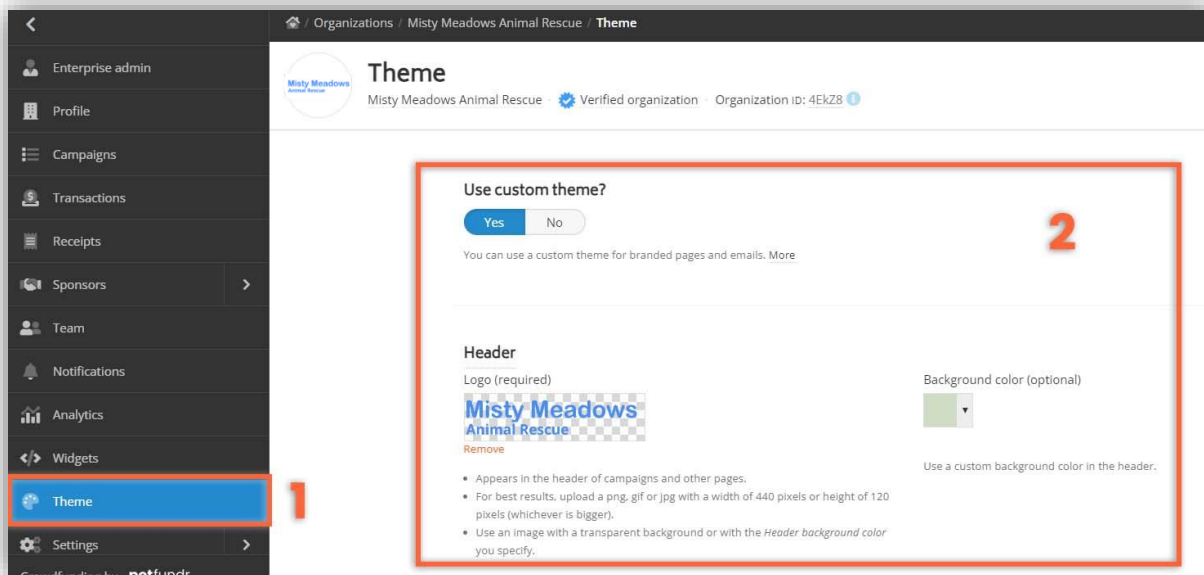
## Profile theme

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!).

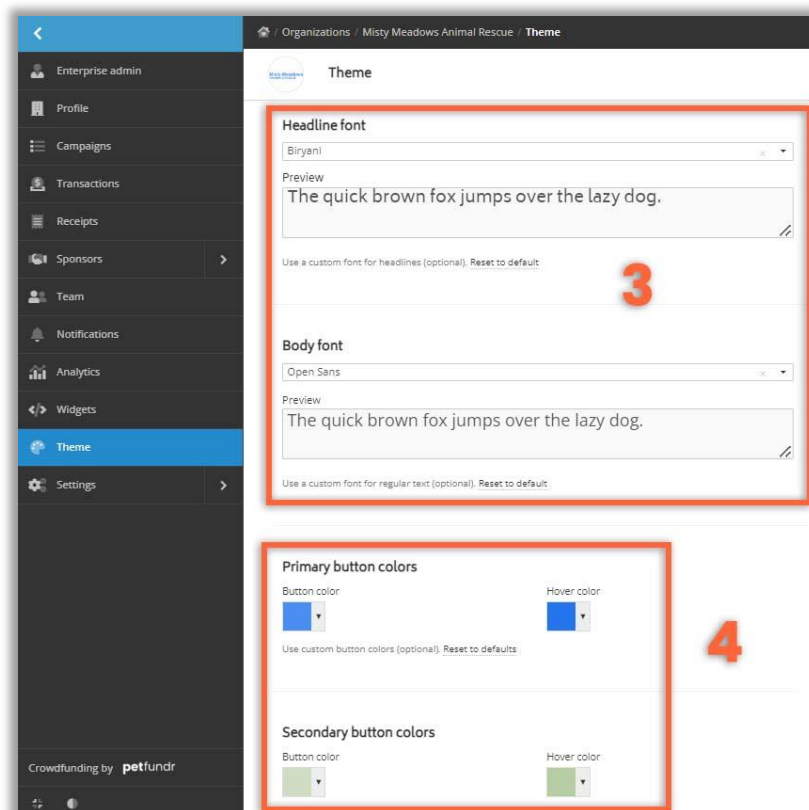
Click the "Theme" option in the sidebar menu (1). From here, you will see options to upload your logo, choose a colour, and insert navigation links for the header bar (2).

**(image on next page)**





Scroll down for options to customize the fonts for your public profile and campaign (1). **Note: PetFundr 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 (2). Explore the other options and add as much information as you can. Don't forget to Save (3) when you're done!





## Payment processing and receiving funds

### How it works

PetFundr 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 organization and the payment processor – **PetFundr does not hold your funds.** Applicable fees from PetFundr or the processor are deducted from the transaction; no reconciliation is necessary.

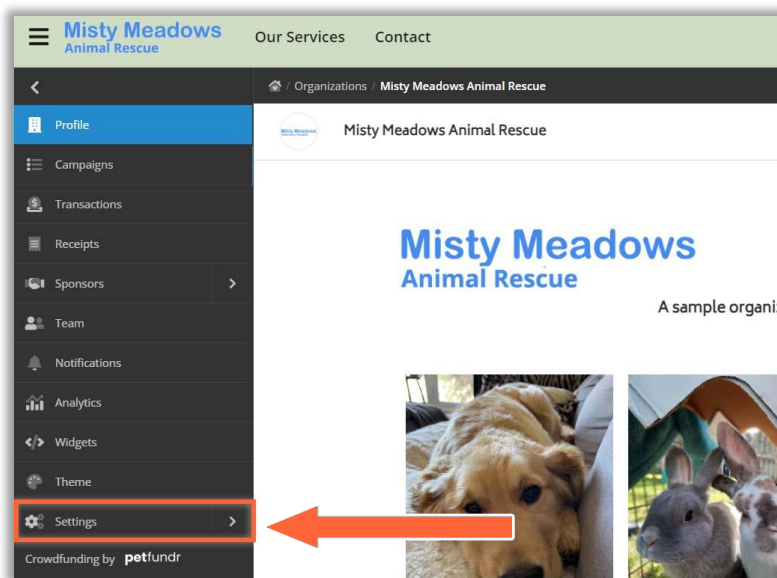
Depending on the campaign type ([see page 7](#)), funds appear in your Stripe or PayPal account either soon after each transaction (for keep-it-all campaigns) or after the campaign has reached its goal and you choose to charge all pledgers (for all-or-nothing campaigns).

PetFundr 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.

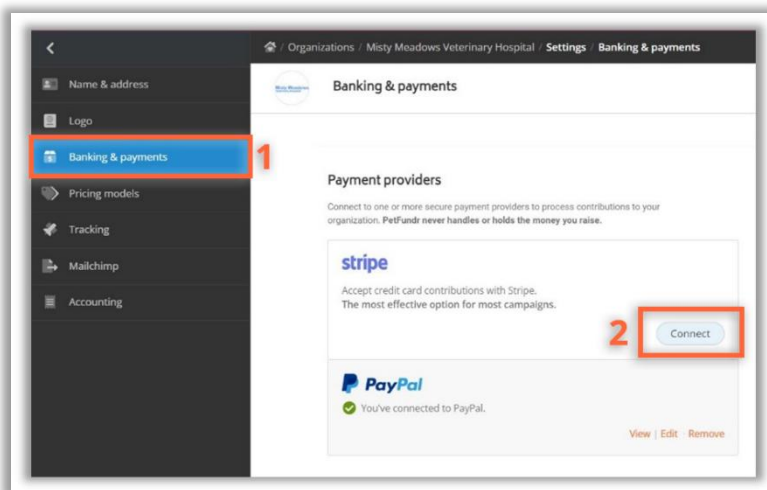
Please note that supporters do NOT require a PayPal account to checkout via credit card with PayPal. However, your PayPal account must be Verified, and the email address must be confirmed to open this guest-checkout option.

## 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," scrolling until you see "Payment Providers." Click 'Connect' by the appropriate provider to add yours. **You MUST click "Save" in the upper right corner to complete the connection!**



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

## Pricing

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

PetFundr 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 organization only pays the payment processing fee to Stripe or PayPal per transaction. PetFundr 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 PetFundr'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 PetFundr'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.

## Automatic Tax Receipting

If you have the proper organization status (for example, Registered Charity in Canada or 501(c)3 nonprofit in the U.S.), you may set up automatic tax receipting for your organization to apply to any campaign you like.

Tax receipts are sent immediately to the supporter. You can resend the receipt to them from your Transactions menus if it gets lost. If the supporter has a PetFundr user account, they can view all contributions and re-download tax receipts.

**Please note: as we are a Canadian company and Canadian law requires tax-deductible receipts to contain the donor's street address, ALL supporters must provide their street address to receive a tax receipt.**

## Setting up tax receipts

**Only the listed Owner of the organization profile can set up and change tax receipting.** You must include the appropriate tax number (For example, CRA number in Canada, EIN in the United States) in your organization information before setting up tax receipting.

Click 'Settings' in the sidebar of your organization profile, then 'Name & address' (1). Enter your tax number (2), then save (3).

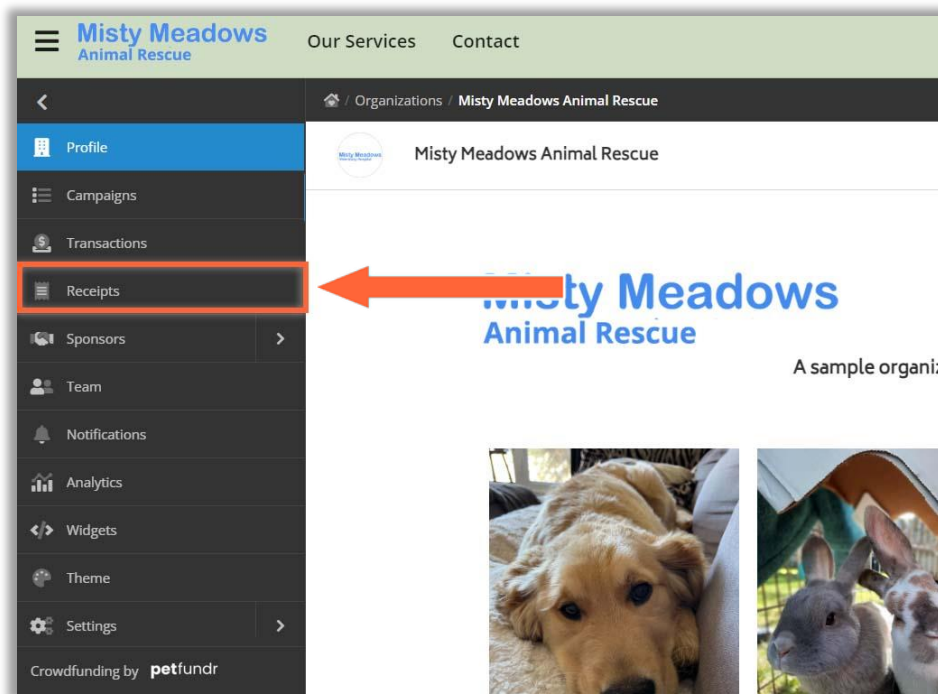
**Note: if you haven't filled out all organization details and at least one payment processor, you must finish these steps before you can save.**

The screenshot shows the 'Name & address' settings page for 'Misty Meadows Animal Rescue'. The page includes a sidebar on the left with 'Name & address' selected (1). The main form contains the following fields:

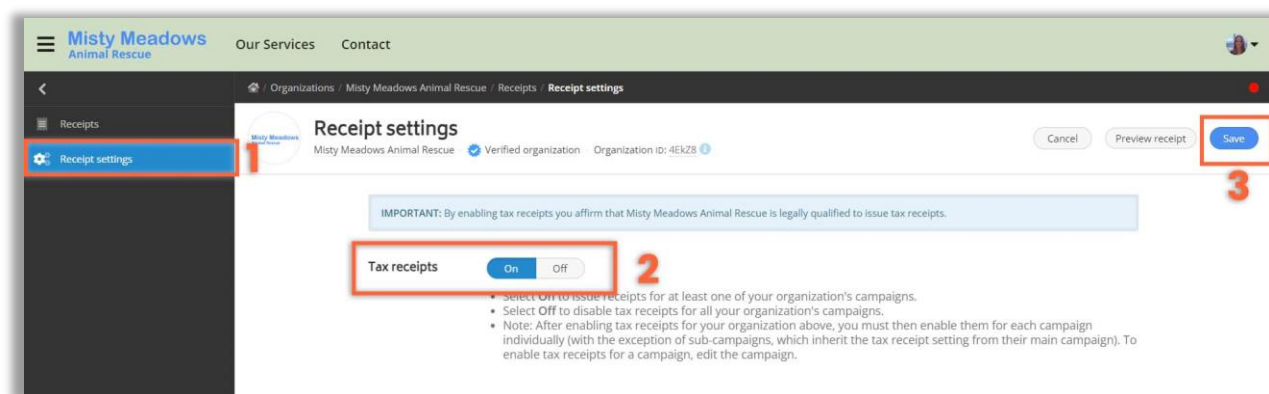
- Type of organization: Non-profit
- Contact email address: info@mmra.org
- Telephone (Optional):
- Street address 1: 123 Canine Ave
- Street address 2 (Optional):
- City: Vancouver
- Country: Canada
- State/Province/Region: British Columbia
- ZIP/Postal code: V7V 7V7
- Website (Optional) More: http://...
- Time zone: (UTC+00:00) UTC
- Tax number (Optional) More: 0001234567-R1 (2)

The 'Save' button is highlighted in the top right corner (3).

Once you've completed this step (or if you already have), click 'Receipts' in the sidebar of your organization profile.



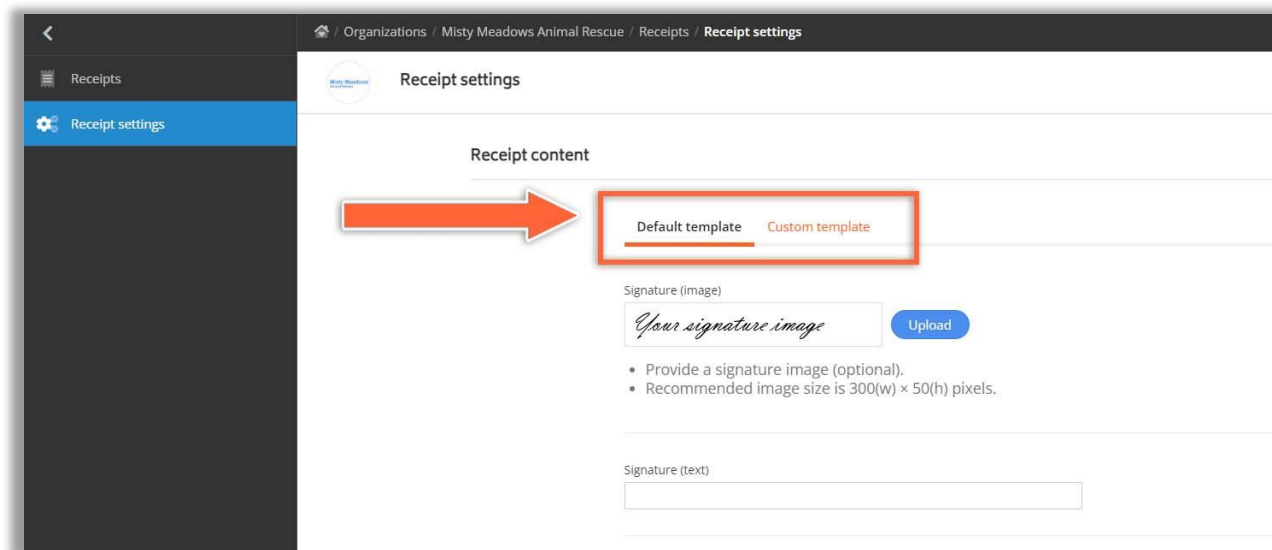
Then, under 'Receipt settings' (1), toggle 'Tax receipts' to **On** (2), then save (3).



Review the options available for what works best for your organization. We suggest leaving 'Automatically enable tax receipts for new campaigns' toggled 'On.'

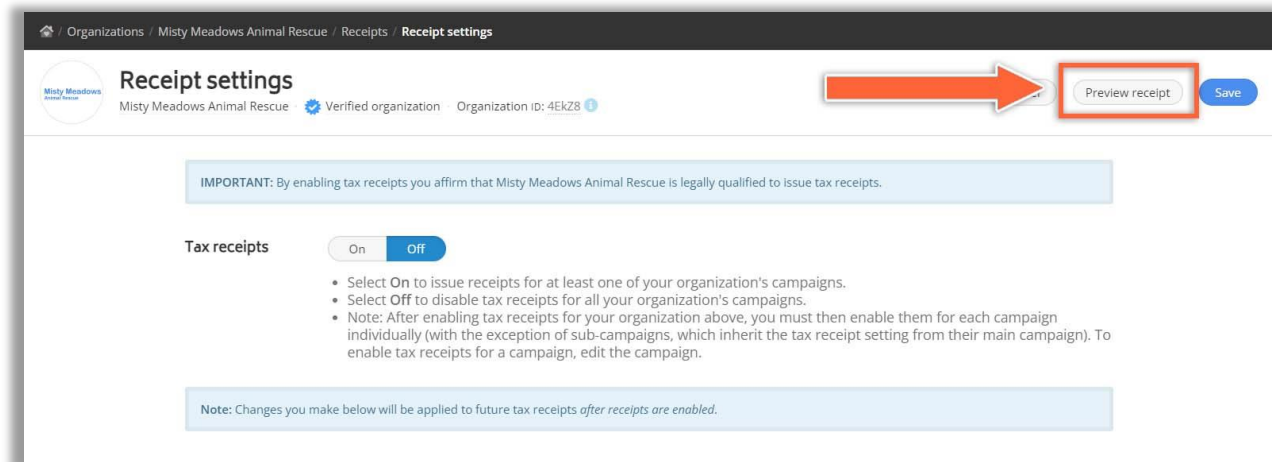
## Tax receipt templates

Scroll down to 'Receipt content' to see your template options.

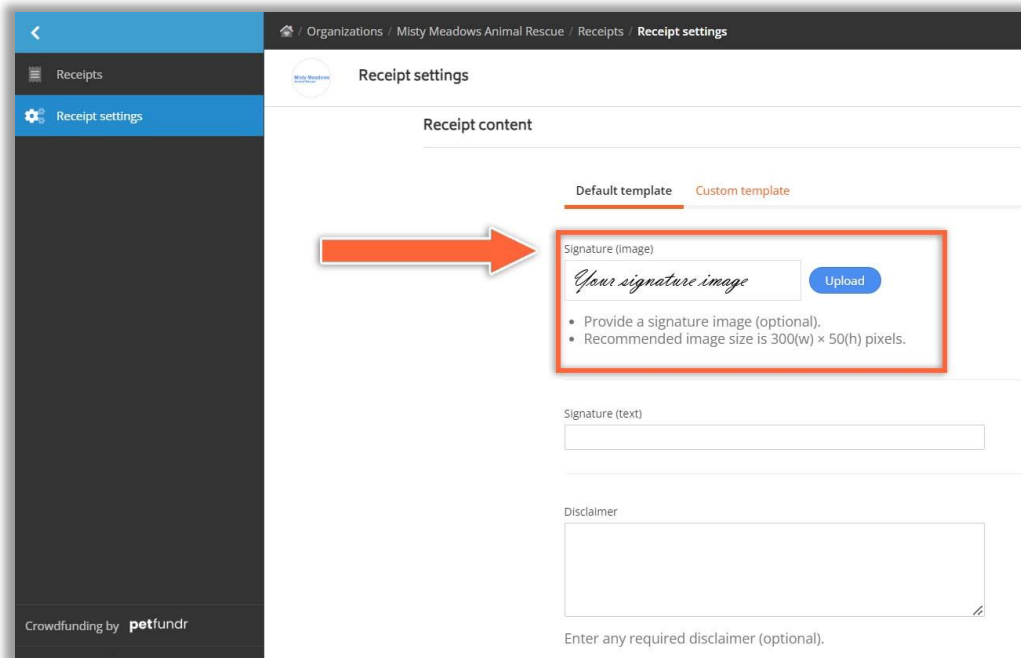


You have two choices for templates.

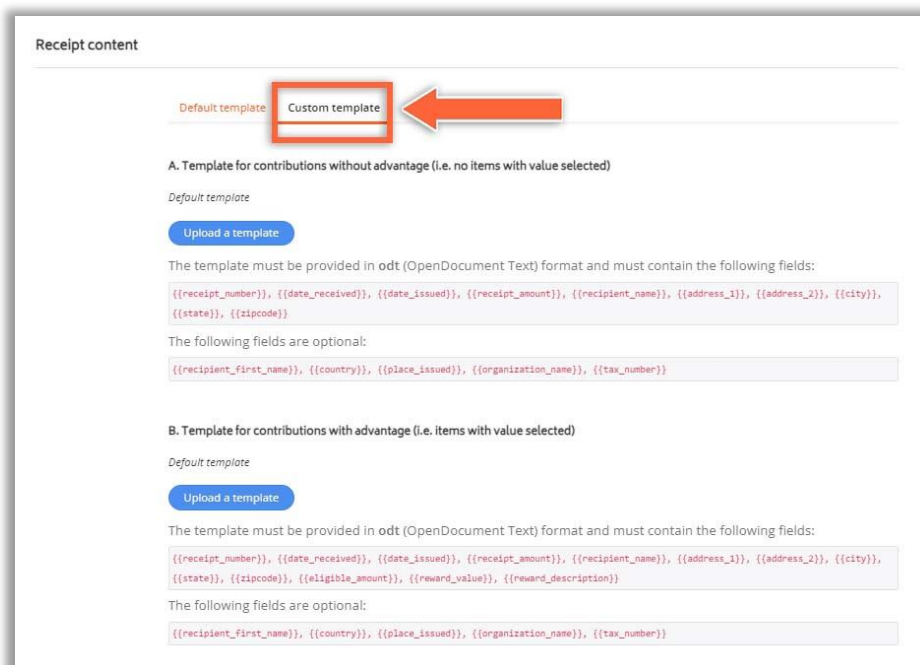
1. PetFundr's default template contains all the required information. To preview, click 'Preview receipt' in the upper right corner of the window:



**Canadian organizations *must* include an image of the signing authority's signature in this template:**



2. You may also create your own receipt using the custom template option. Click 'Custom template' to see what the requirements are. You *must* include the mandatory options, and the others are optional.



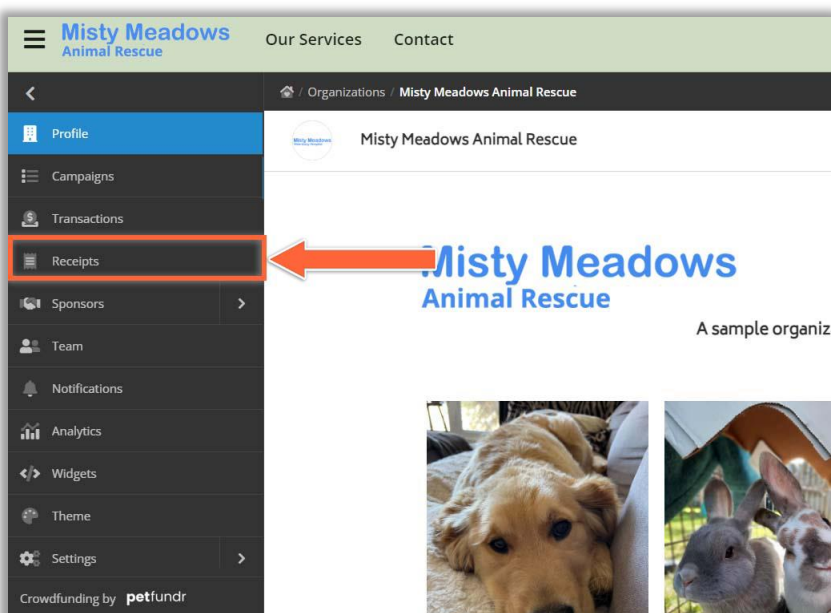




## Turning on receipting for campaigns

Tax receipts can be turned on or off for each campaign. If you chose “Automatically enable tax receipts for new campaigns,” you won’t have to turn receipts on for each campaign. If you did not select this option, then you must manually turn receipting ‘On’ for each campaign.

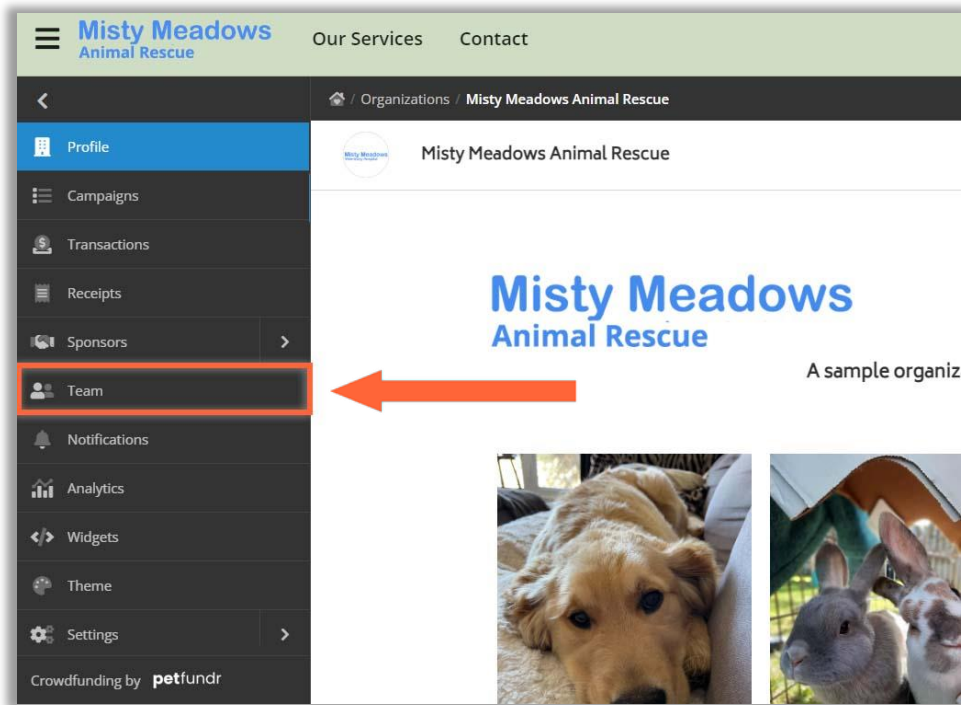
Turn tax receipting on or off by selecting ‘Receipts’ in the Edit menu of your main campaign. **Note: this option appears only when receipts are configured and turned on in your organization profile.**



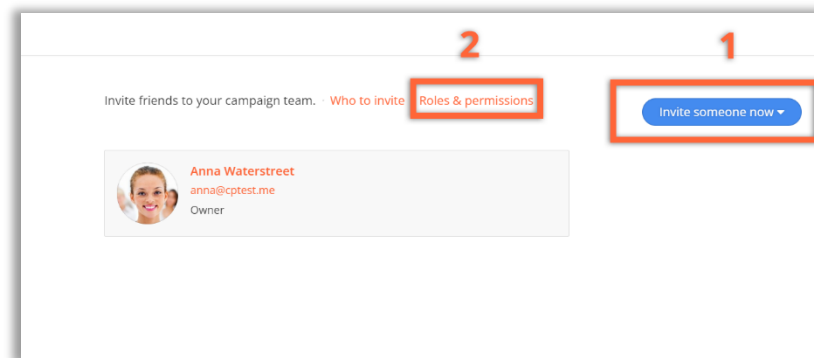
## Choosing your staff

As many staff members and volunteers as needed may join the organization team to help manage campaigns and financials.

To add 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 or volunteer, 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 member able to change payment processing accounts and tax receipt information. Only one Owner is allowed.
- **Manager** – Managers have limited control of the organization and complete control of every campaign. They can do anything the owner can, including editing the campaign, posting campaign updates, accessing transaction and financial information, and inviting/removing team members. However, they cannot view/edit payment processing accounts or tax receipt information.
- **Editor** – Can view and edit campaigns, post updates, and manage contacts in the Communications Center. They cannot access funds or 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 funds or 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 PetFundr, using whichever layouts work best for your organization. Here, we will be outlining how the Microproject with Grid layout works.

### The Microproject Layout

In this layout, you create a **main campaign**, which tells the overarching story of your service or mission and the general project goals. Then, you create **sub-campaigns** (as many as needed) under that one main campaign.

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 sub-campaign creation through cloning to avoid the same repeated work,
- Supporters and visitors may see the total funds you've raised for all sub-projects,
- When supporters choose a sub-campaign to contribute to, they receive updates for that sub-campaign only (not the rest, unless they've subscribed or contributed to another sub-campaign as well)
- Offline contributions can be attributed to any sub-campaign or the main campaign.

### Example

You are a dog shelter specializing in rescuing strays from the street and providing veterinary care and training to get them forever-home-ready. Your *main campaign* tells the overarching story of how your shelter operates, the concerns over stray dogs in your area, your goals for each animal, perhaps success stories, etc. It also shows a tally of all funds the sub-campaigns under its umbrella have raised.

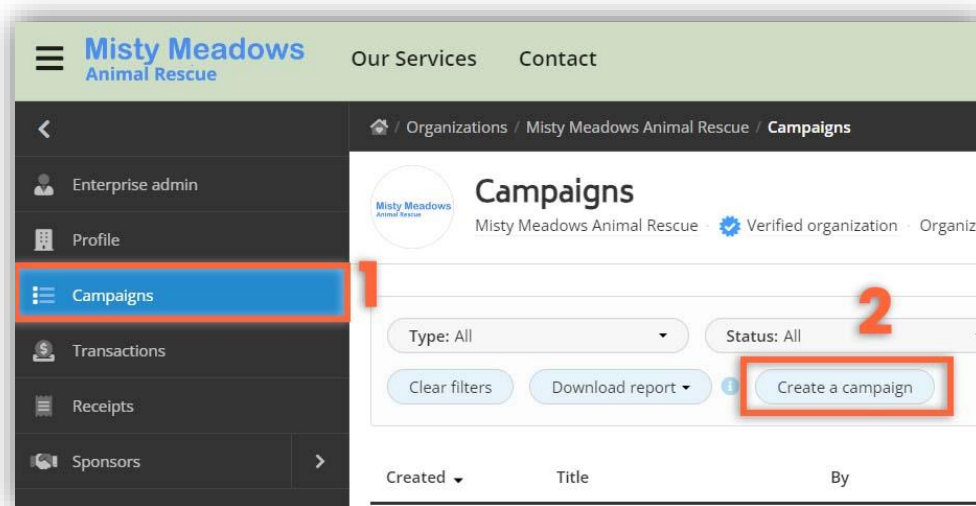
Each sub-campaign is the story of one dog – how they came to your shelter, the medical treatment and training they need and how much funding that requires, etc.

You update each campaign as the story progresses for each dog, hopefully ending with adoption!

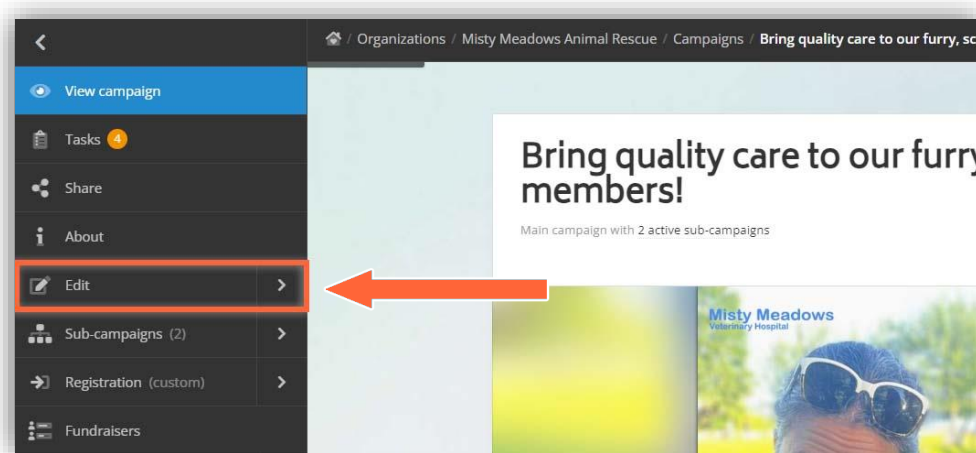
Supporters of each campaign will receive notification of these updates in their email (unless they've opted out). They will not receive updates to any other sub-campaign.

## Starting a Microproject campaign

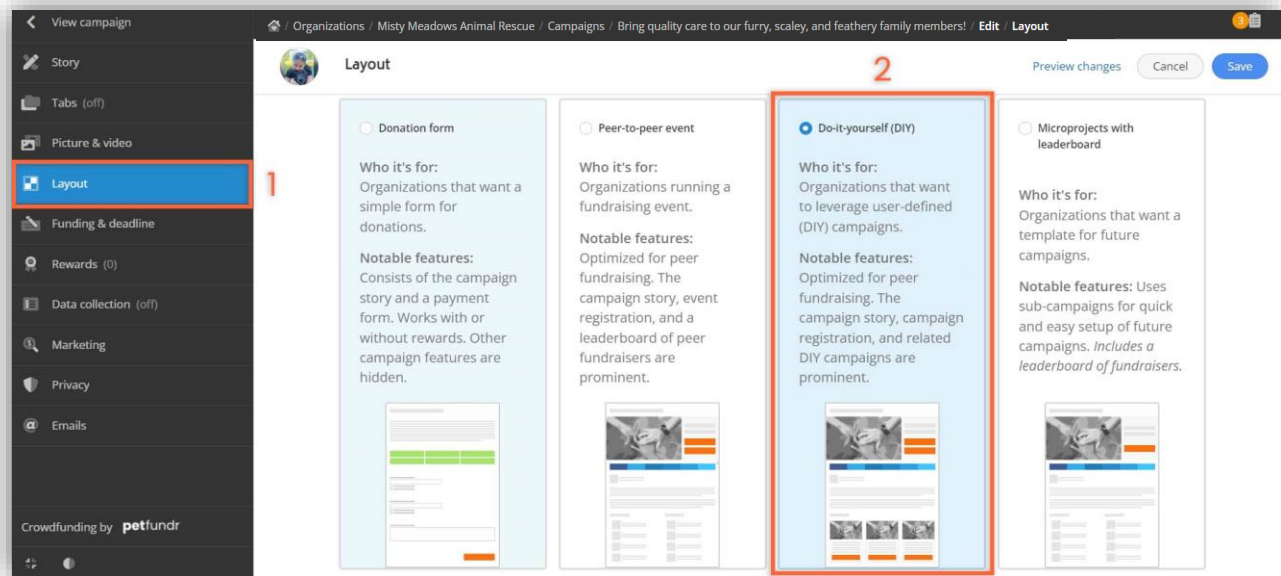
To start a new campaign, go to your organization profile and select "Campaigns" in your sidebar menu (1), then "Create a campaign" (2):



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 organization!**

## Editing your main campaign

### Title

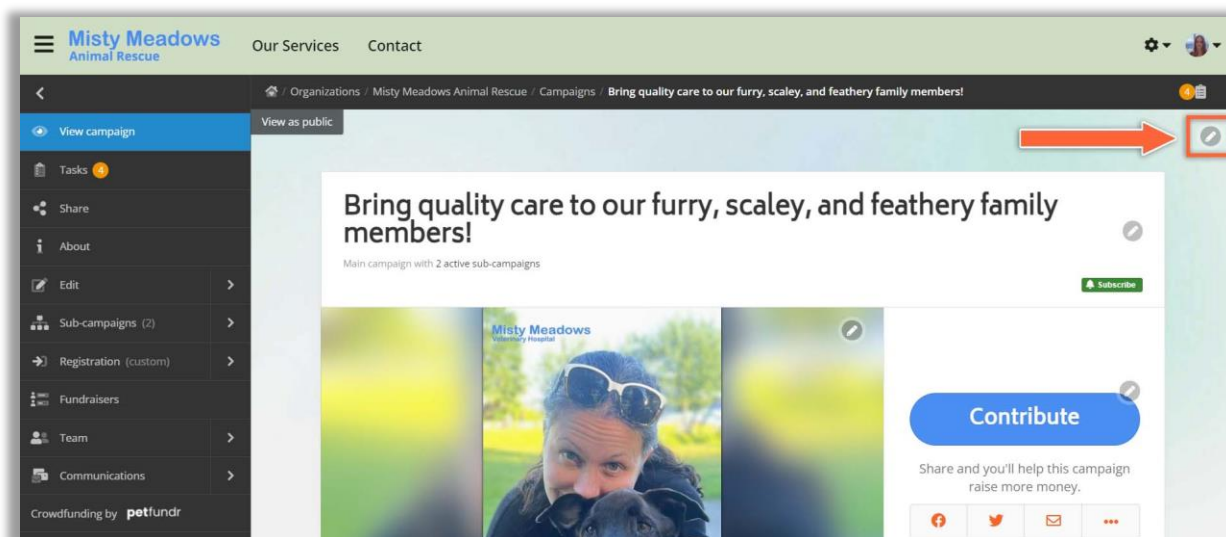
Your campaign title should show the purpose of this campaign. For example, if the campaign is for advocates to register their own campaign to raise funds for your nonprofit, consider something like "Register a campaign and help raise funds for our amazing animals!"

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.

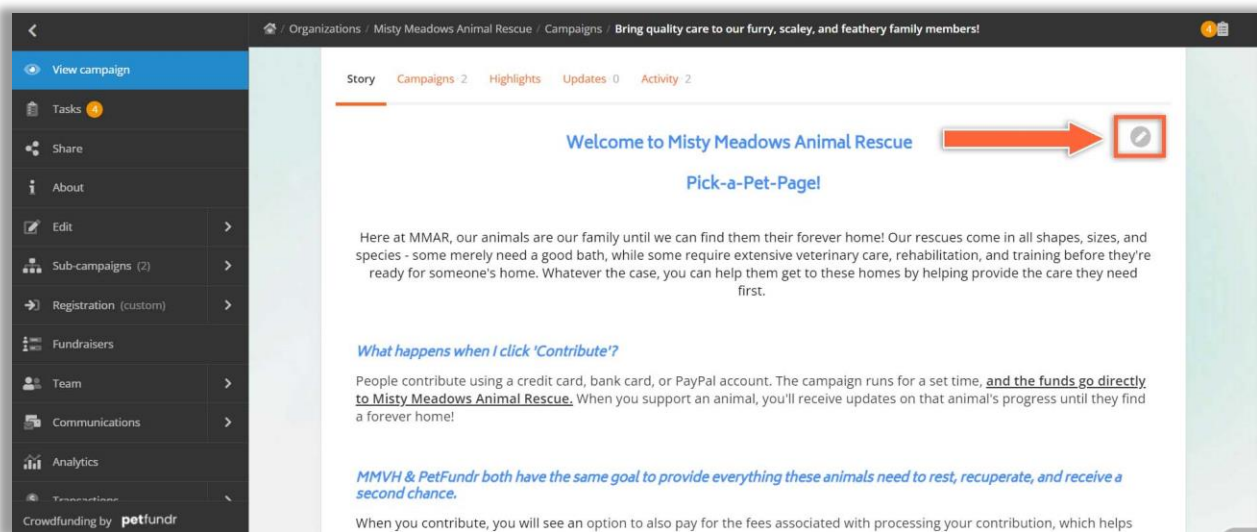
You can find the pencil icon to change the background image in the upper right corner of the main campaign window:



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

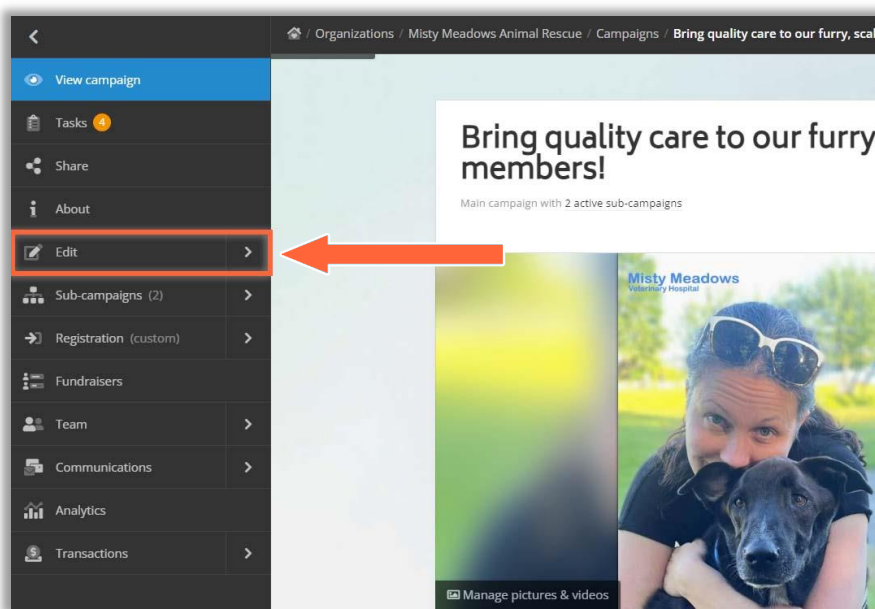
## Main campaign story

Edit the main story with the pencil icon in the story window's upper right corner. See [page 27](#) for suggestions on what to include.

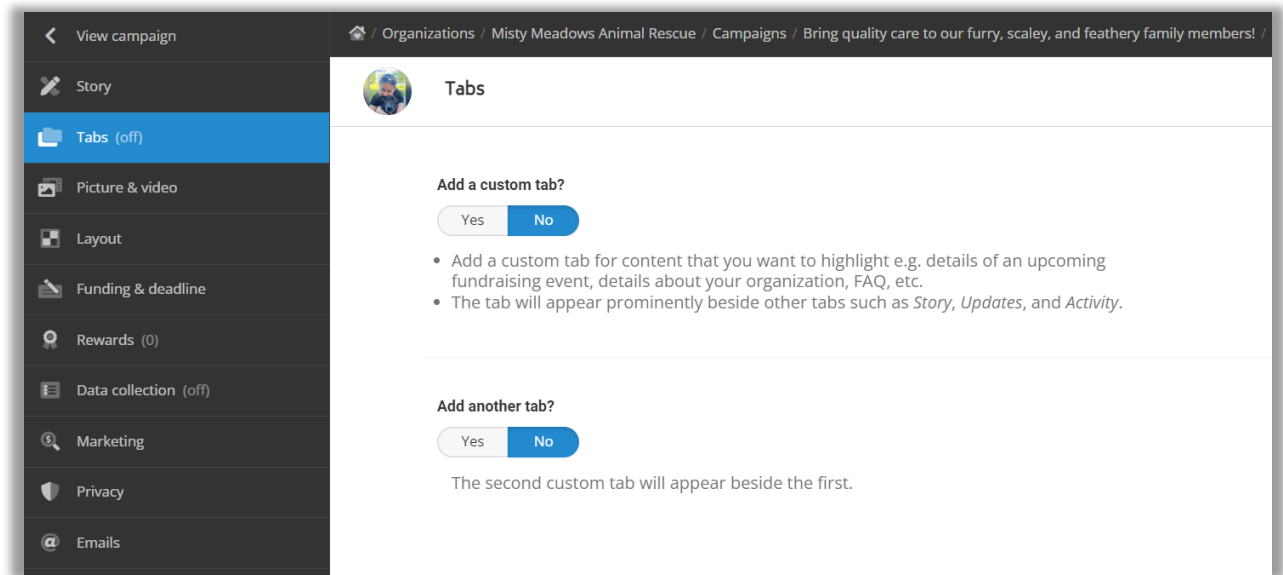


## Custom tabs

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.'

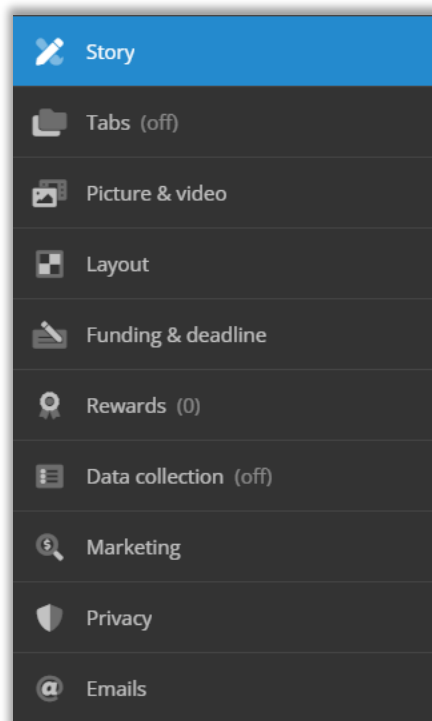






## Campaign 'Edit' menu

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



## Telling your stories

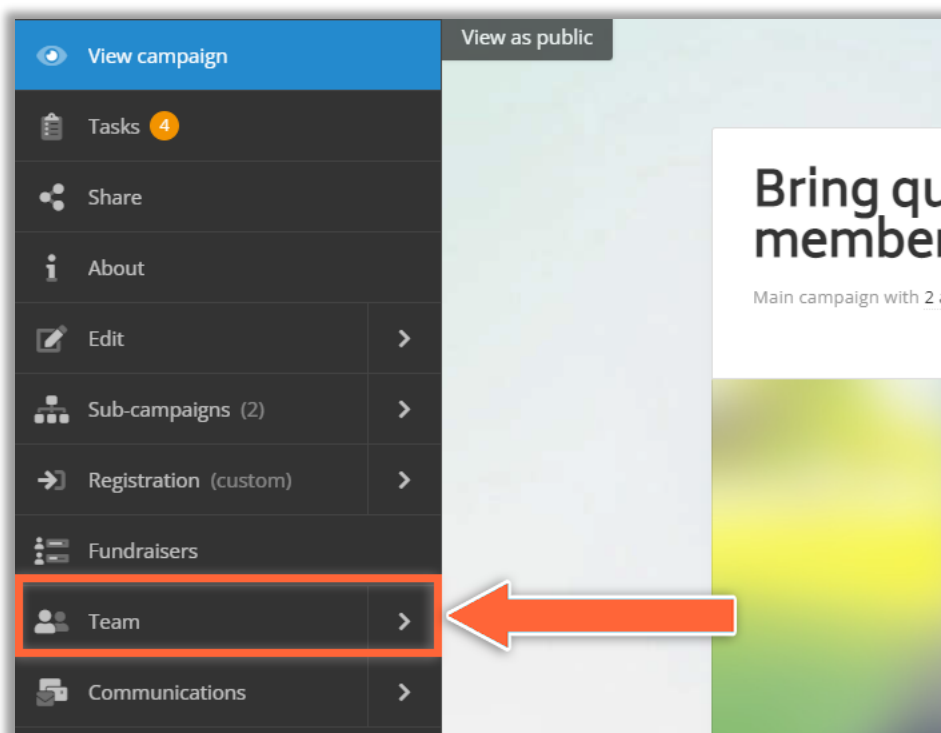
PetFundr provides multiple avenues for sharing information you want to tell your supporters. Use these suggestions to coordinate where to write what stories.

<p style="text-align: center;"><b>Organization Profile Story</b></p> <ul style="list-style-type: none"> <li>• Your nonprofit’s values, mission statement, vision, etc.</li> <li>• How you started.</li> <li>• Where you operate</li> <li>• Links to important sections of your website</li> </ul>	<p style="text-align: center;"><b>Main Campaign Story</b></p> <ul style="list-style-type: none"> <li>• The main problem you work to solve.</li> <li>• Solution(s) to this problem.</li> <li>• How the crowdfunding process works (including the pricing model you’ve chosen).</li> </ul>
<p style="text-align: center;"><b>Sub-campaign Pre-Set Story</b></p> <ul style="list-style-type: none"> <li>• Calls to action: Remind readers to contribute and share the campaign (so you don’t have to write it over again with each new sub-campaign story)</li> <li>• Statement on the partnership with PetFundr and how funds are deposited directly to your account.</li> <li>• What happens when they hit the Contribute button:             <ul style="list-style-type: none"> <li>○ Pricing model – will they be asked for a top-up, to cover fees, or nothing further?</li> <li>○ Campaign type – is this a keep-it-all campaign or a pledge toward an all-or-nothing campaign? What happens if the campaign does <i>not</i> hit the goal?</li> </ul> </li> </ul>	<p style="text-align: center;"><b>Sub-campaign-Specific Story</b></p> <ul style="list-style-type: none"> <li>• Details on the specific animal this sub-campaign is for. Think of the emotional appeal; talk about funny/sweet stories about their personality, history, etc.</li> <li>• Problem and solution.</li> <li>• Pictures/video             <ul style="list-style-type: none"> <li>○ 3-5 pictures/ 30-60 sec video.</li> <li>○ Choose media that elicit happy feelings with clear images.</li> </ul> </li> </ul>
<p style="text-align: center;"><b>Extra Tabs: Main Campaign</b></p> <ul style="list-style-type: none"> <li>• Extra info such as:             <ul style="list-style-type: none"> <li>○ Success Story</li> <li>○ About your practice or staff</li> <li>○ FAQs on crowdfunding</li> </ul> </li> </ul>	<p style="text-align: center;"><b>Extra Tabs: Sub-campaigns</b></p> <ul style="list-style-type: none"> <li>• Extra info such as:             <ul style="list-style-type: none"> <li>○ More info about the animal or your organization</li> <li>○ FAQs on crowdfunding</li> </ul> </li> </ul>

## Campaign teams

Members of your organization profile 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.

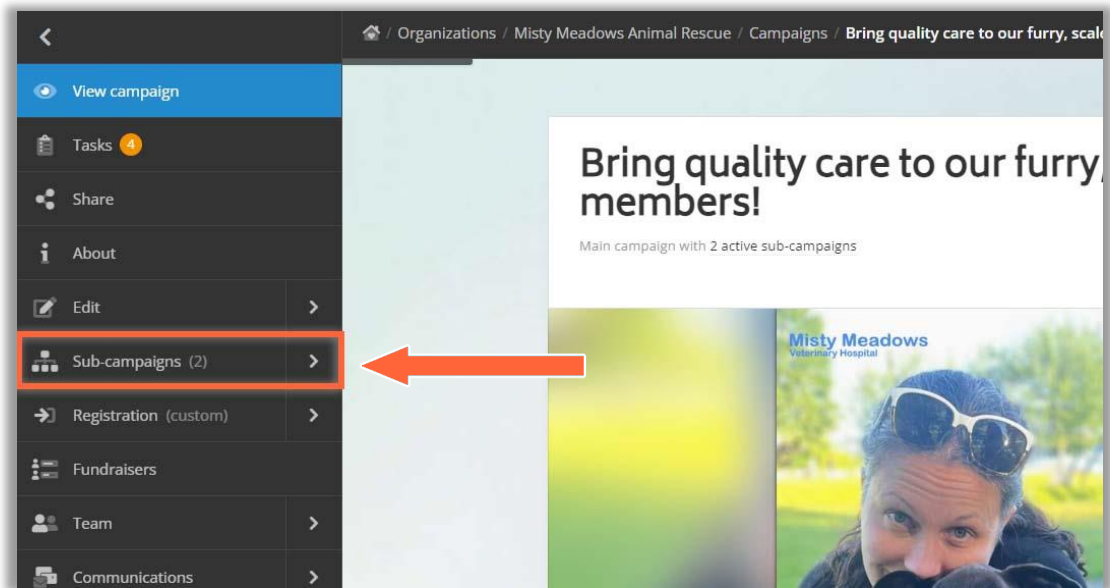


The method for inviting members, plus roles and permissions are similar for these campaign teams as your organization staff team on **page 19**, with one new role added:

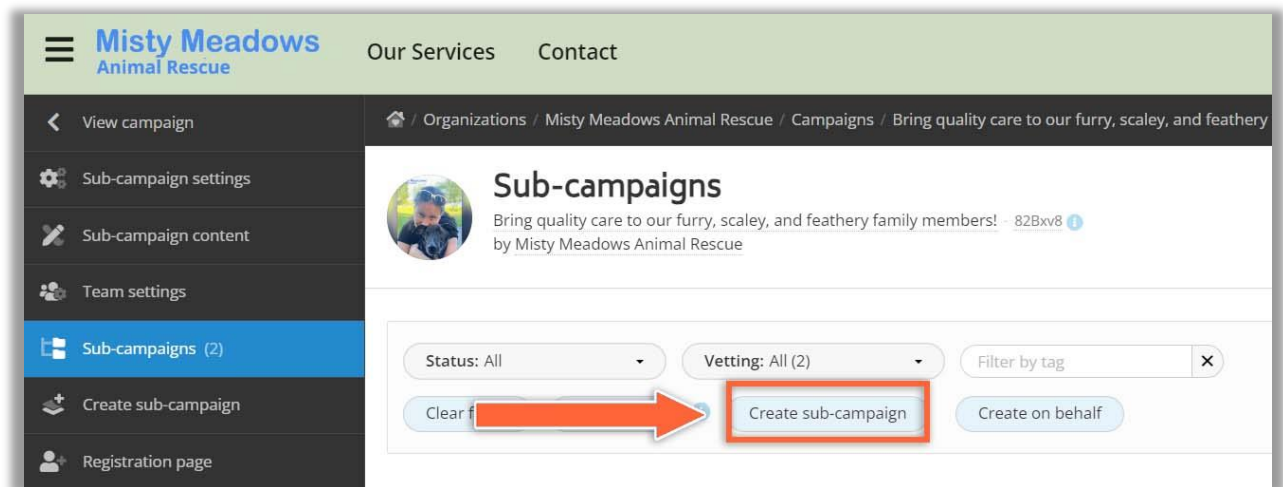
**Member** – This role is for someone you'd like to help share the campaign with a broader audience without adding extra permissions. They can access the Communications tab in the sidebar menu for importing contacts onto your campaign mailing list only.

## Creating sub-campaigns

To start a new sub-campaign under your main campaign, click 'Sub-campaigns' in the sidebar menu:



Then click 'Create sub-campaign.'

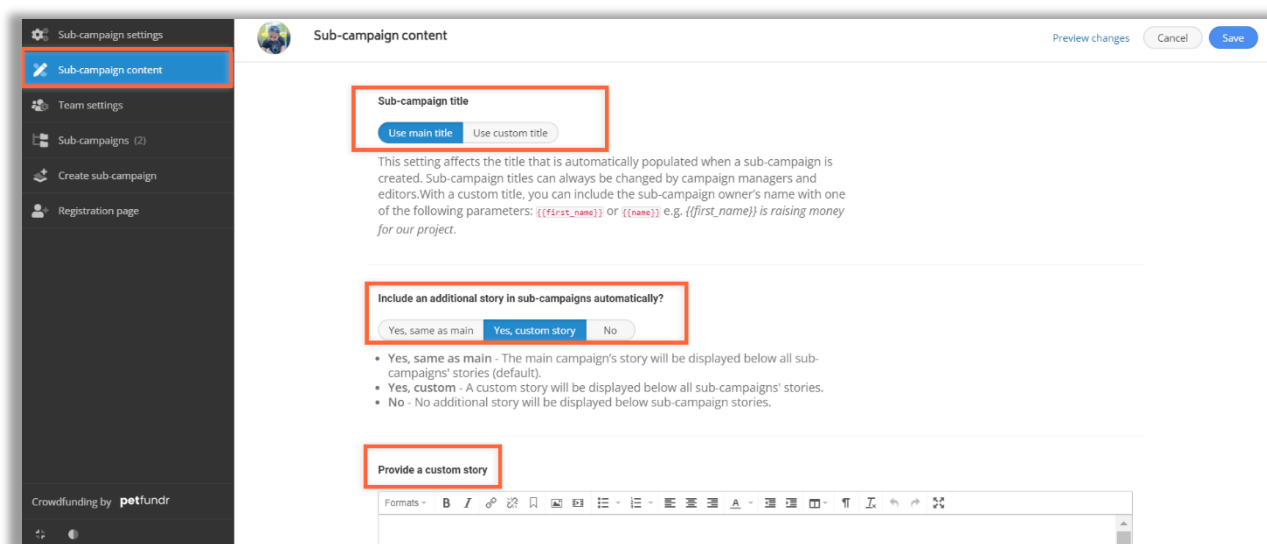


You'll then be taken through a campaign creation flow, but everything is editable once the template is created!

## 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 clients, click “Sub-campaigns” in the sidebar menu of your main campaign, then ‘Sub-campaign content.’ Here, you’ll find options to write a title template and include a sub-campaign story. You can carry over the main campaign story or not have one. We recommend a custom story that’s shorter than your main campaign story.



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

## Managing sub-campaigns

Under the 'Sub-campaigns' menu (1) where you create sub-campaigns, 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),
- 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.**

The screenshot shows the 'Sub-campaigns' management page for Misty Meadows Animal Rescue. The sidebar on the left has 'Sub-campaigns (2)' highlighted. The main content area features a table with the following data:

Created	Title	By	Contact email	Goal	Raised	Vetting	Status	Tags	Actions
May 17, 2023	Bring quality care to our furry, scaley, and feathery family members!	Team Jupiter	shannon@fundrazr.com	—	\$0	Approved	Running		[Expand] [Actions]
May 15, 2023	Please help us fund the surgery Bean needs to play with his girl again!	Anna Waterstreet	anna@cptest.me	\$6,000	\$350	Approved	Running		[Expand] [Actions]

Showing 1 - 2 of 2 total

## Rewards

Rewards are an excellent way to encourage contributions and communicate impact and need to your supporters. We'll provide examples as we talk about types.

### Types of rewards

#### Perks

Perks are gifts provided to the supporter in return for their contribution. Examples we have seen include:

- Branded swag (water bottles, t-shirts, pens, etc.)
- 'Thank you' notes (digital or mailed) from animals
- Photos or paw-prints of animals
- Sponsor opportunities for new enclosures, medical areas, etc.

#### Products

Not too popular in the animal welfare nonprofit world, products are items created by the campaign owner and 'sold' for around market value to the supporter. For example,

- Fertilizer from animal manure
- Homemade treats and other pet items
- Small-scale hay sales

#### Wishes

Wishes are popular in the animal-nonprofit space, as they help to show supporters what their contributions go toward purchasing. Items required by your nonprofit are listed and 'bought' by supporters. Such as:

- Food and treats

- Training supplies and services
- Leashes and harnesses
- Water and food bowls
- Toys
- 'Time' such as one hour walk with a staff member or volunteer
- Veterinary bill coverage

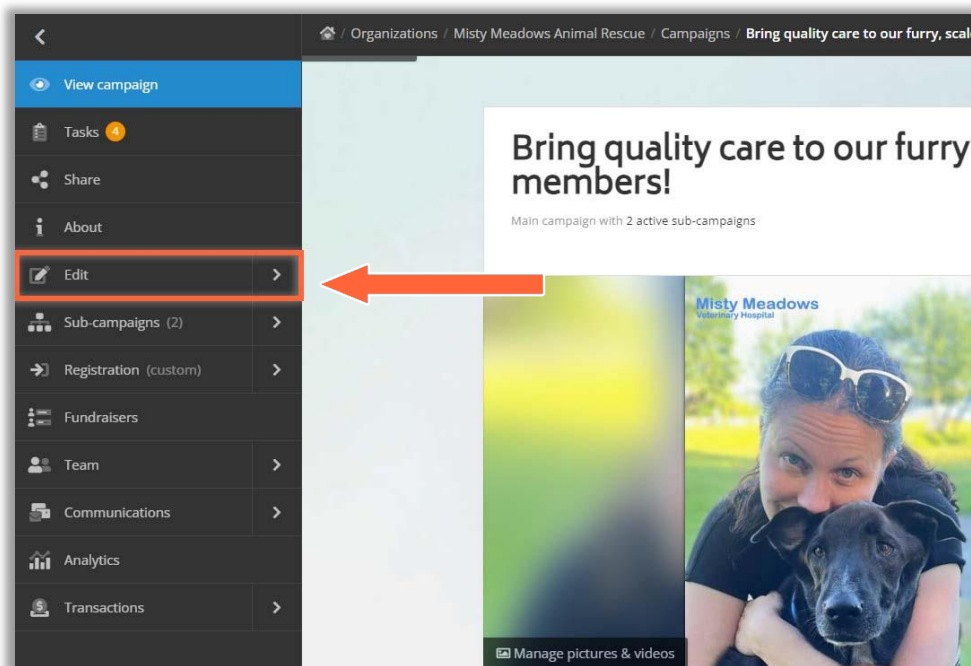
## Tickets

This is an excellent option if your organization is hosting a fundraising event requiring an entrance ticket. Tickets are digitally sent and can be scanned to check authenticity.

**Please note that these are entrance tickets only and cannot be used for raffles, lotteries, or auctions.**

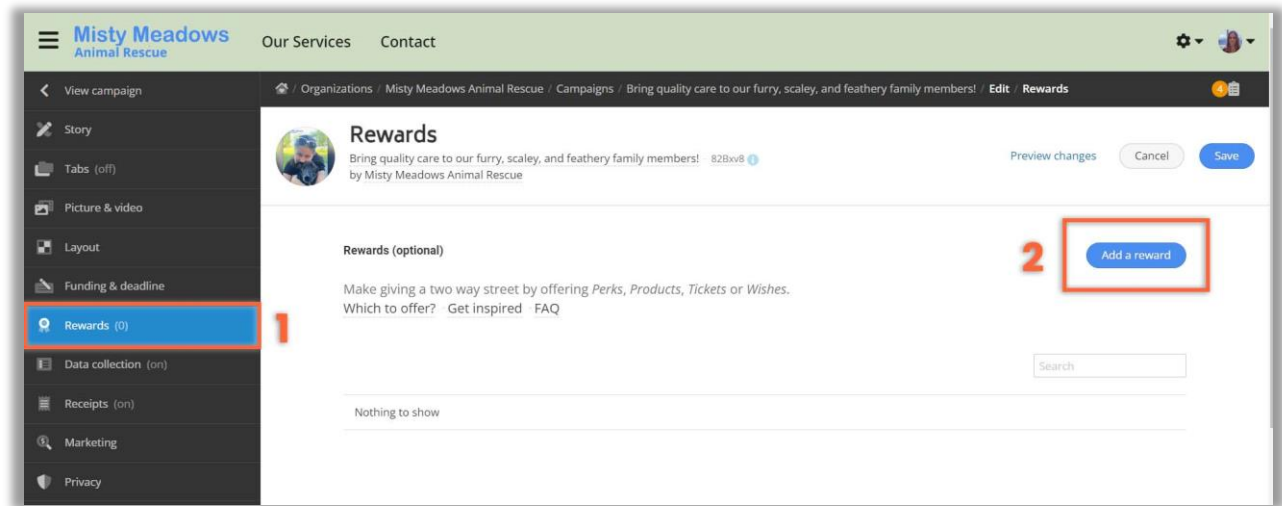
## Adding rewards

Add rewards from the Edit menu in the sidebar of your main campaign.

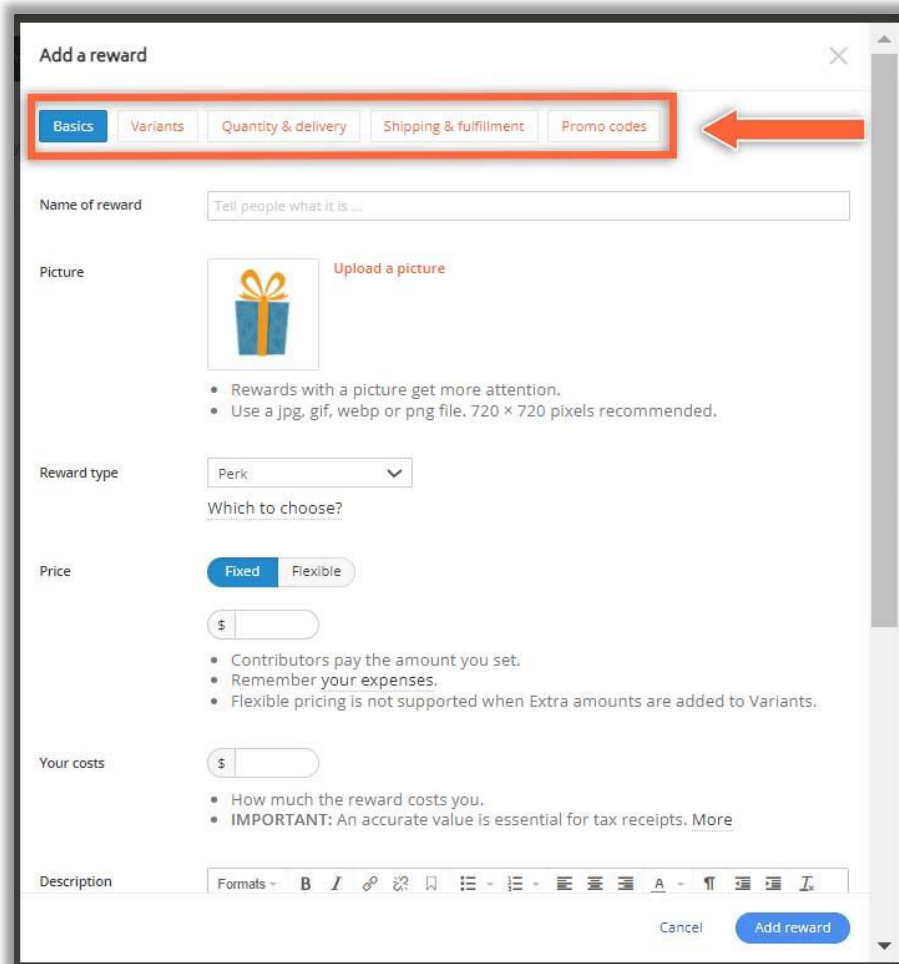




Then click 'Rewards' (1), then 'Add a reward' (2).



There are multiple options depending on your reward and situation, so explore all menu items!

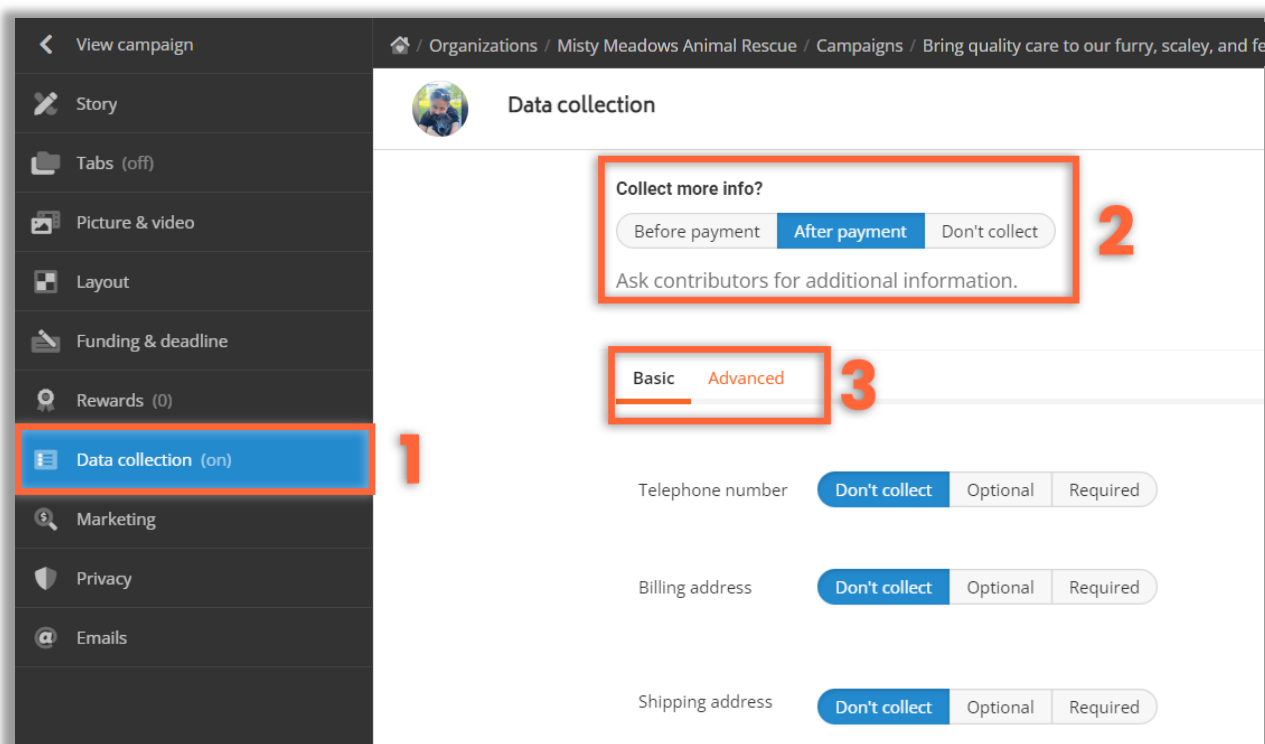


## Contributor information & transactions

### Choosing contributor information

PetFundr collects full names and email addresses from all contributors to a campaign by default (if tax receipts are eligible, street addresses are also collected). If you require further information from your contributors, 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).

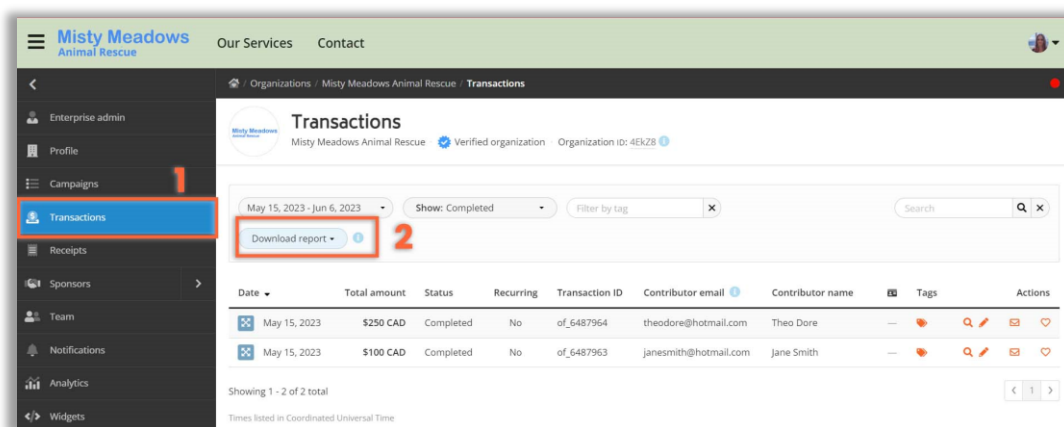


**IMPORTANT: Do not ask for information you do not truly need. Doing so may cause potential supporters to hesitate to contribute, affecting your clients' ability to raise the funds they need.**

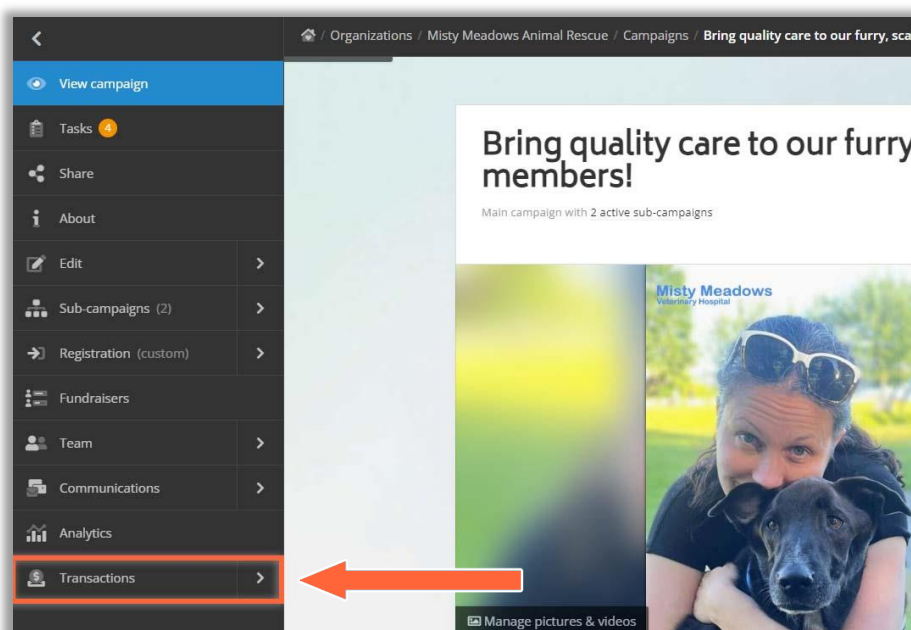
## Viewing contributor information and transactions

There are three places to view your transactions:

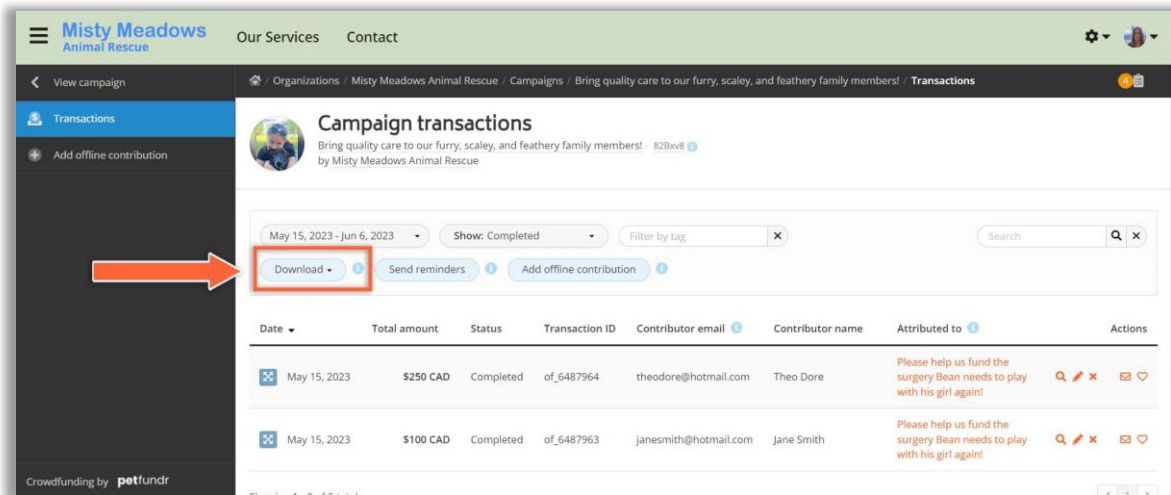
1. View ALL transactions processed through your practice in your organization profile. Click 'Transactions' (1) in the sidebar menu of your organization profile. To view extra contributor information such as that you've customized, you must download the list (2) in the format of your choice.



2. View transactions for one main campaign, including all sub-campaigns, using the Transactions menu in the sidebar menu of that campaign.

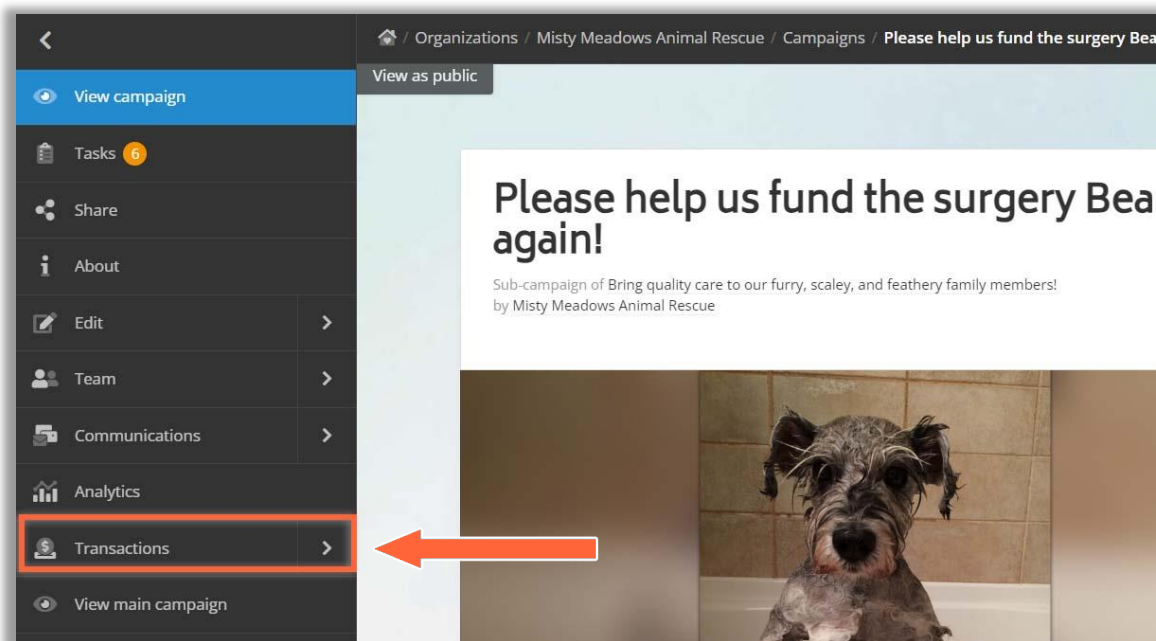


As with the organization transaction menu, you must download the transaction list to view customized information.

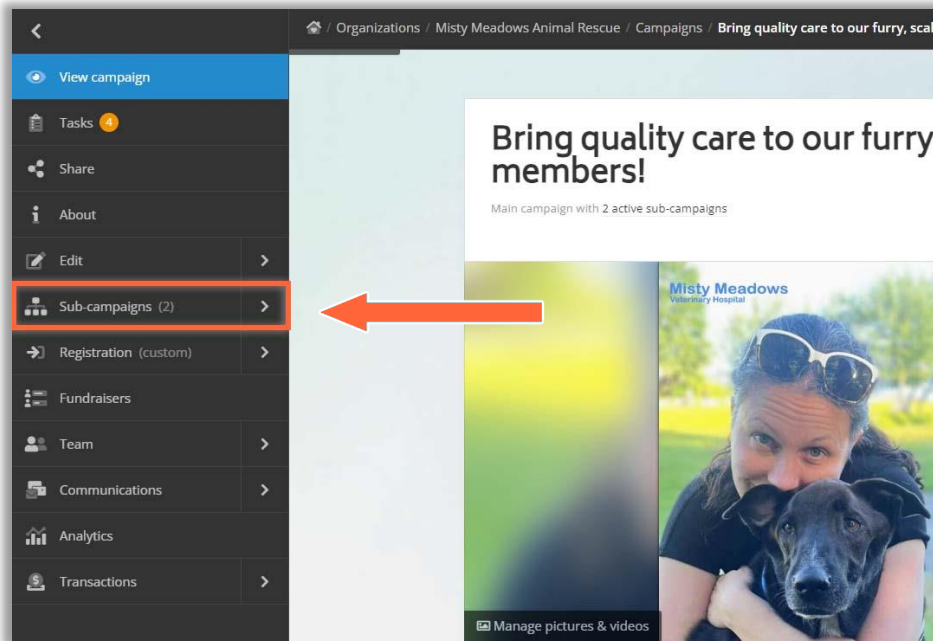


3. To view transactions for a specific sub-campaign only, you can either:

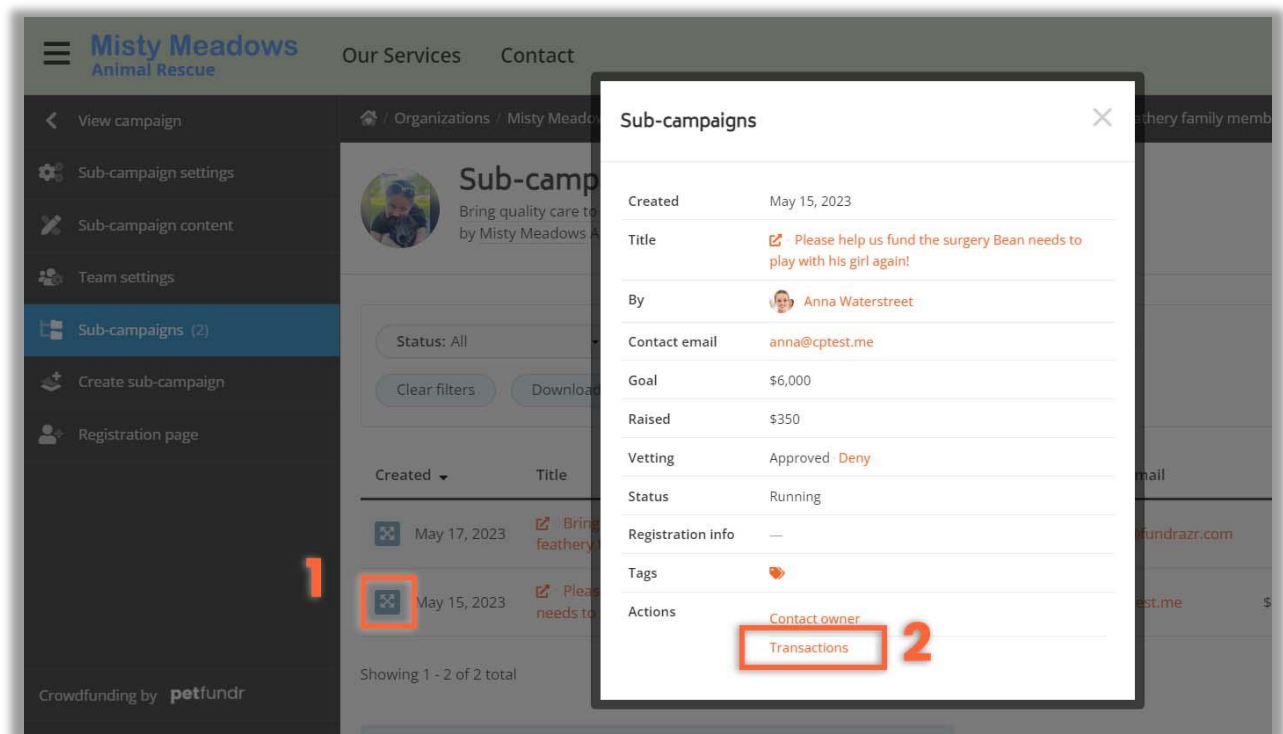
- a. Click 'Transactions' in the sidebar menu of the campaign,



b. Or click 'Sub-campaigns' in the sidebar menu of the *main campaign*,



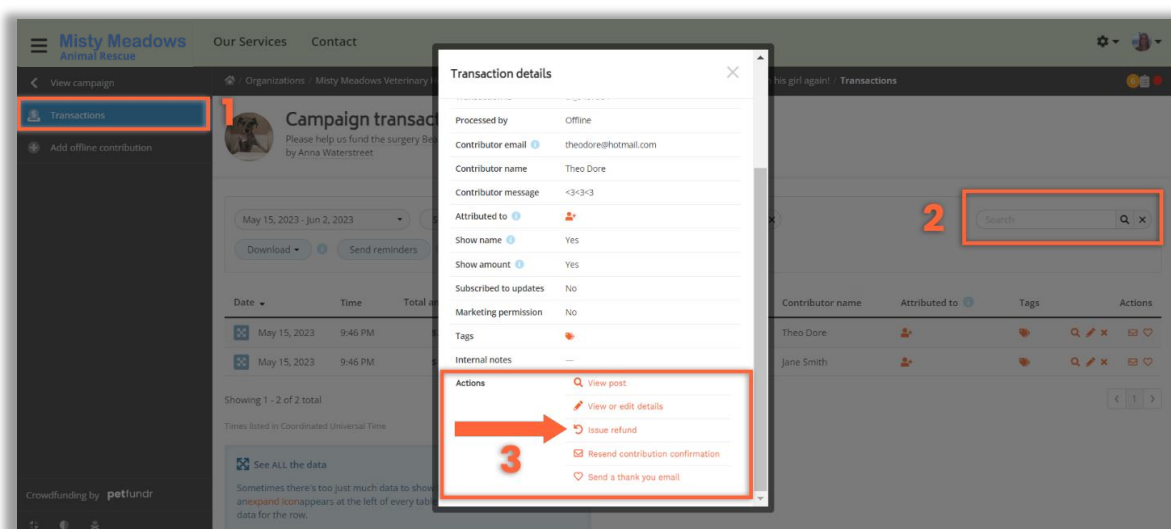
then under the expand icon beside the sub-campaign list item (1), you'll find a 'Transactions' option (2).



## 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.
  - 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.
- 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.

**Refund payment?** ✕

---

Do you want to refund the following payment:

<b>Amount</b>	\$50
<b>Transaction ID</b>	ch_3N7kD4CfAOGFFP
<b>Email</b>	anna@cptest.me
<b>Name</b>	Anna Waterstreet

Please provide a reason:

Select ... ▼

Due to the payment provider's refund policy, the transaction fees incurred on the original payment will not be refunded to the campaign's payment account. However, this contributor will still receive a full refund.

Cancel
Refund

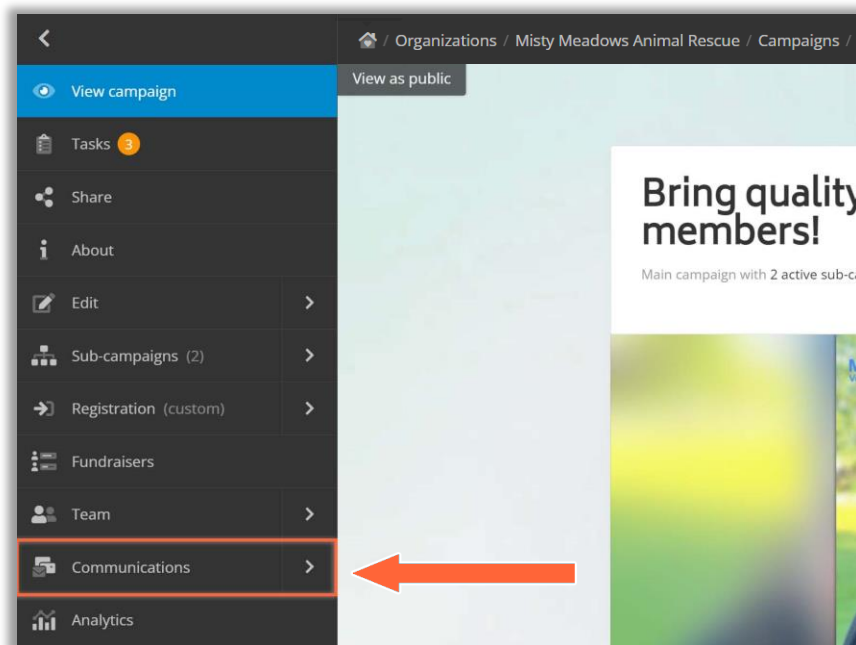
## Customizing emails

### Campaign notification email

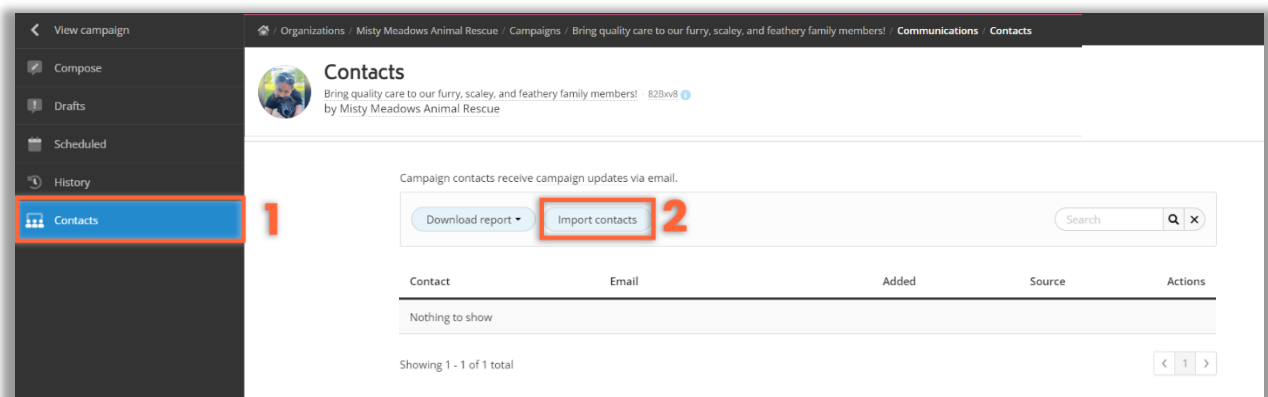
This email is sent to anyone imported onto the main campaign's contact list. One-off links can be quickly sent using the email button on the campaign's share bar, but if you want to invite multiple people to view your main campaign through this contacts list, you may want to customize part of the message.

**Note: only the custom message section of this email is editable.**

Click 'Communications' in the sidebar panel of your main campaign.

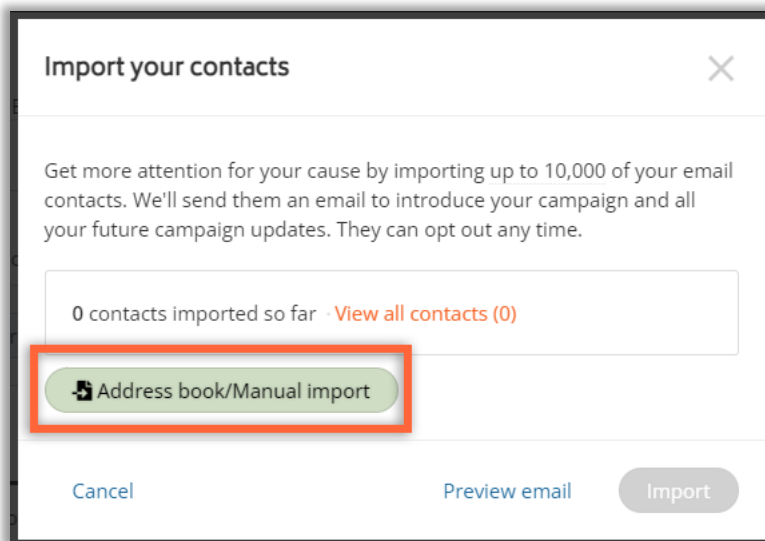


Then, click 'Contacts' (1) and 'Import contacts' (2).

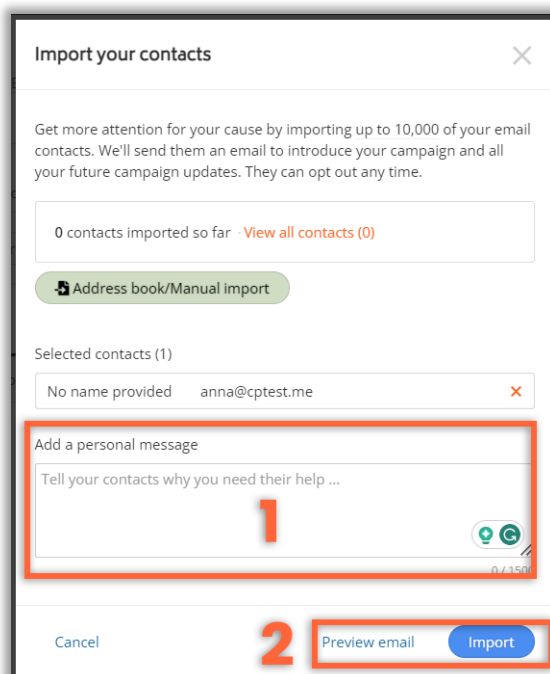




Click 'Address book/Manual import' and import at least one contact to view the custom message feature.

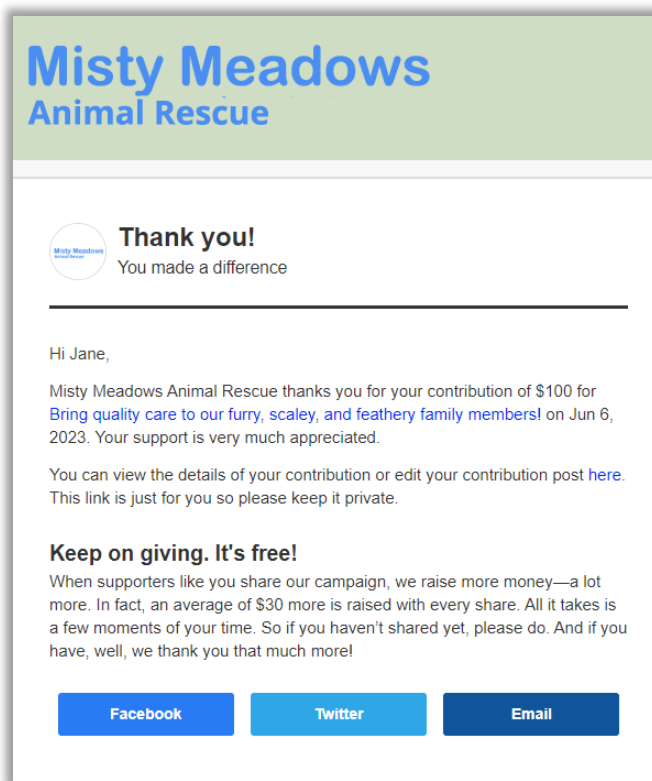


Write your personal message in the new space that appears (1), then preview and click 'Import' (2) once you're satisfied. If your campaign is launched, this email will be sent immediately. If the campaign is NOT launched, the email will be sent as soon as you've chosen to launch it.

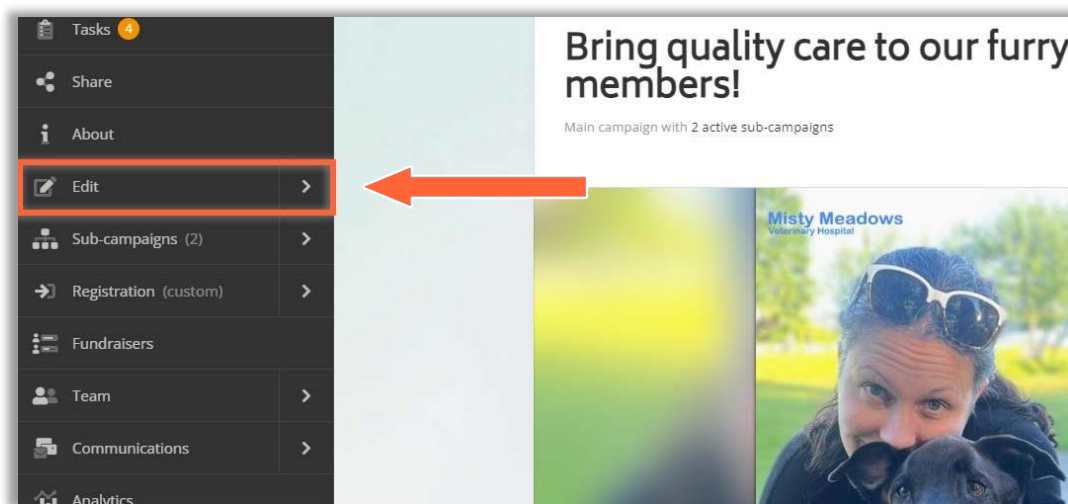


## Contributor payment confirmation email

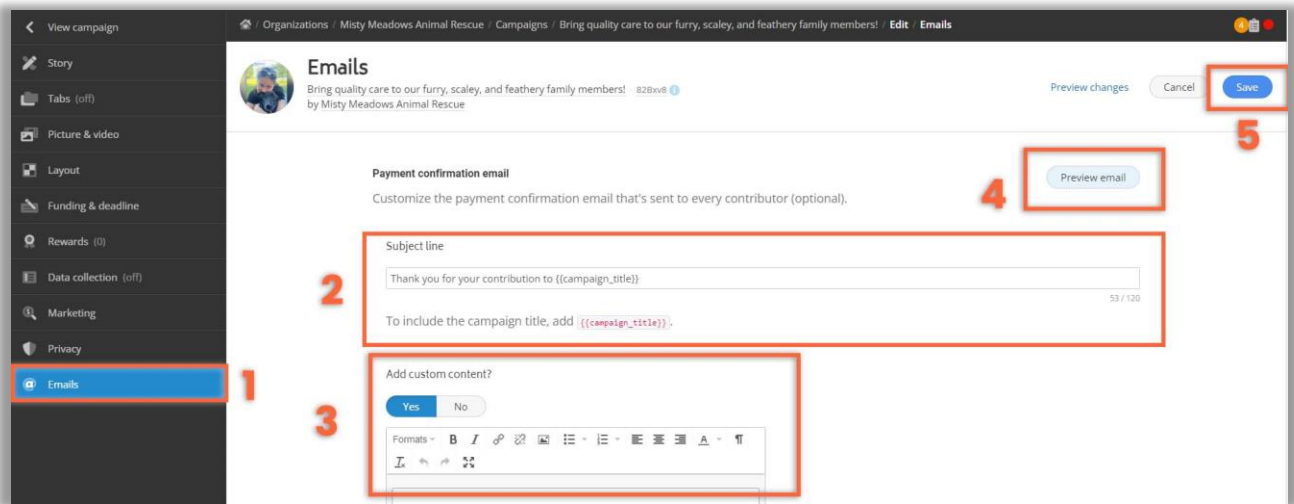
Every contribution to a main or sub-campaign under your organization profile receives this email. Without further action, it will look like this (with your practice’s branding as customized in the Theme menu of your organization profile):



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)!

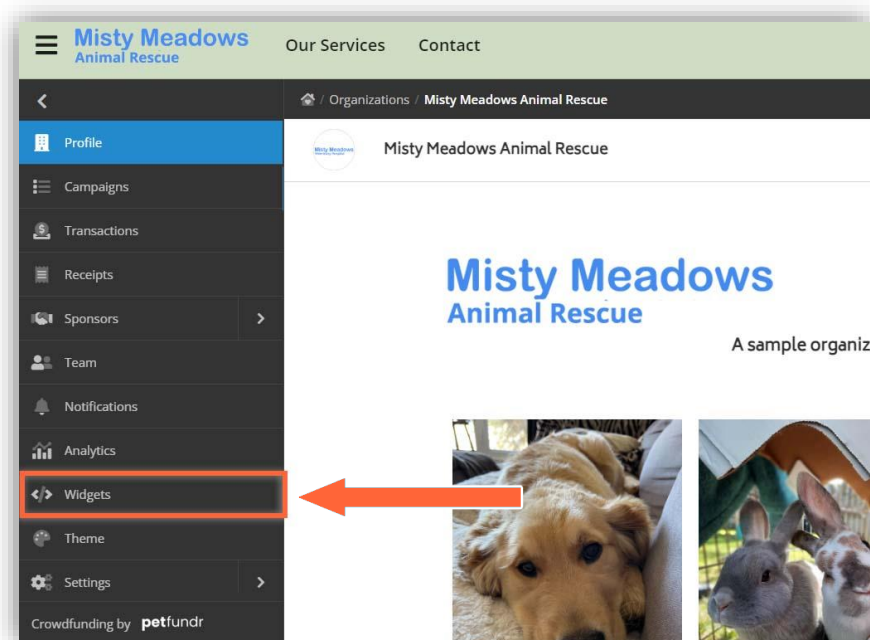


## SmartWidgets

Embeddable widgets can be customized so your organization can promote campaigns 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:

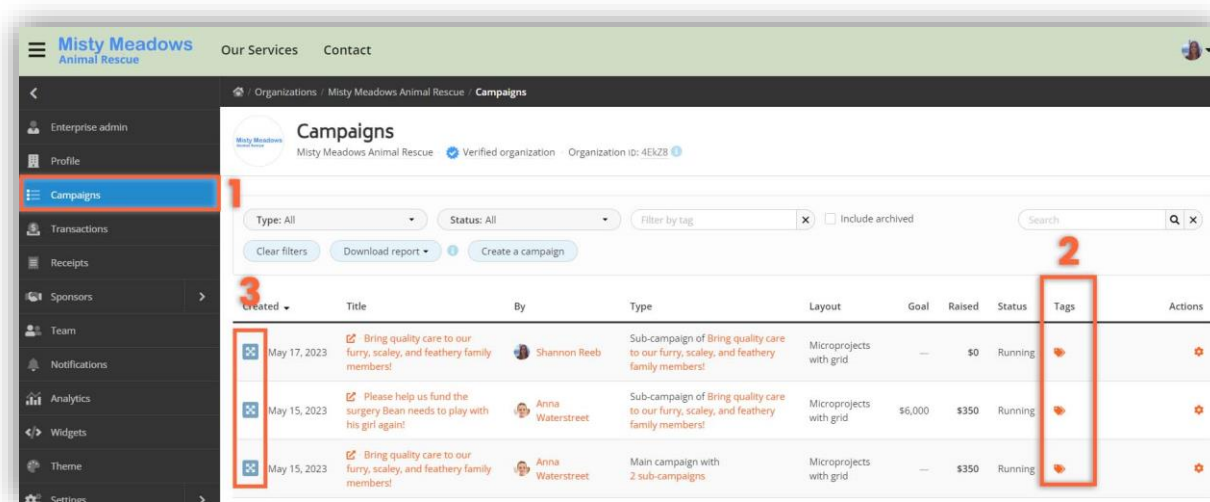


There are many available widget types to choose from:

- **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.

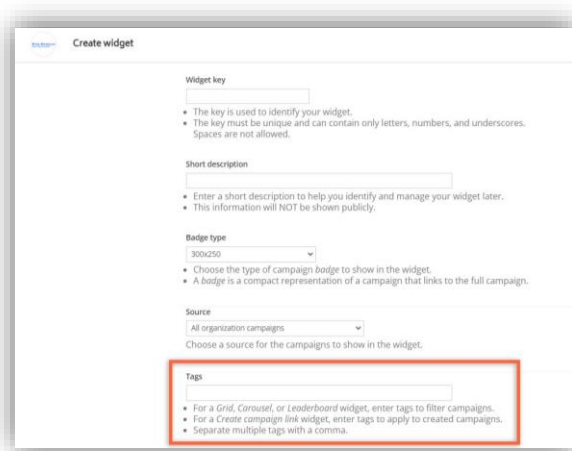
You can create ' Tags ' if you only want specific campaigns to appear within your widget.

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:



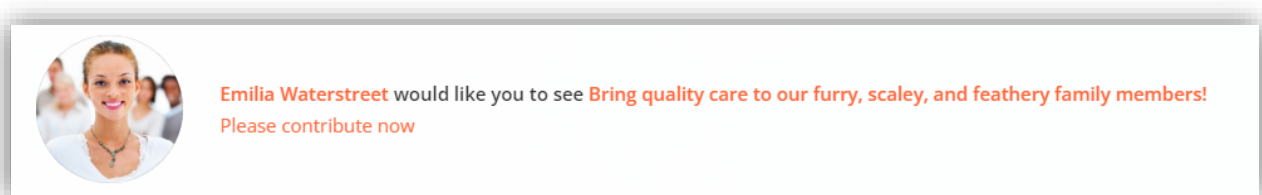
## FAQ

- Why is the endorsement banner showing the wrong name?
- How can I delete a sub-campaign?
- How are tax receipts distributed?
- How do we know when a sub-campaign is funded?
- Can we ensure our clients do not raise more than the goal?

## 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 PetFundr (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 someone 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 supporter shares the campaign they just contributed to. In that case, they are targeting a separate community – their own – allowing that community to understand that supporter's interest and involvement.

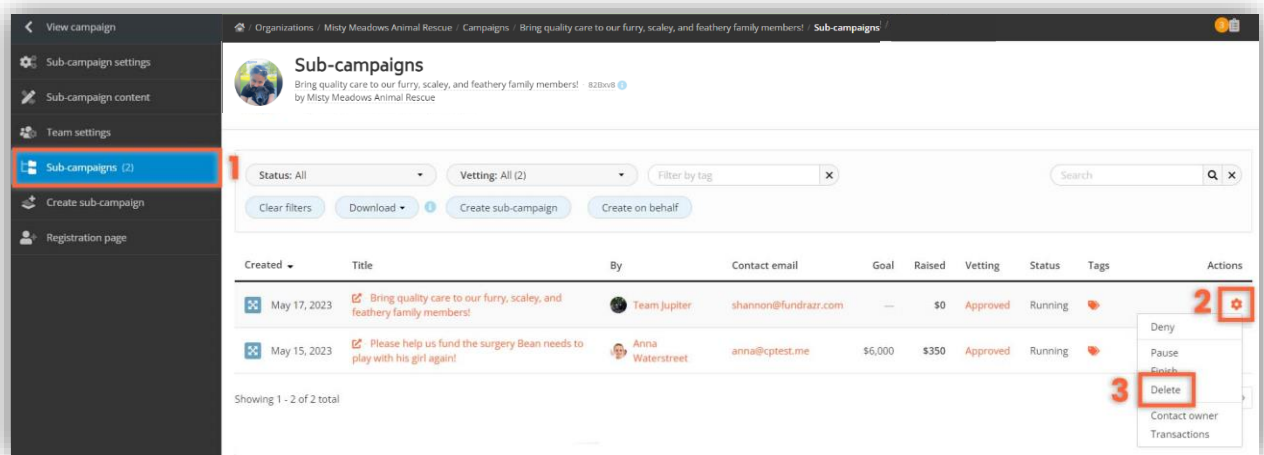
Confirm the reference code is correct to ensure the right person's message appears when creating a link to your campaign.

**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 can I delete a sub-campaign?

From your master campaign, go to “Sub-campaigns” in your sidebar menu, then under “Sub-campaigns” (1) in the sidebar menu. You’ll see a list of sub-campaigns, each having a gear icon in the far-right column (2). The delete button is here (3).

**NOTE: You cannot delete a sub-campaign with funds attached. Speak to your contact at PetFundr to discuss options.**



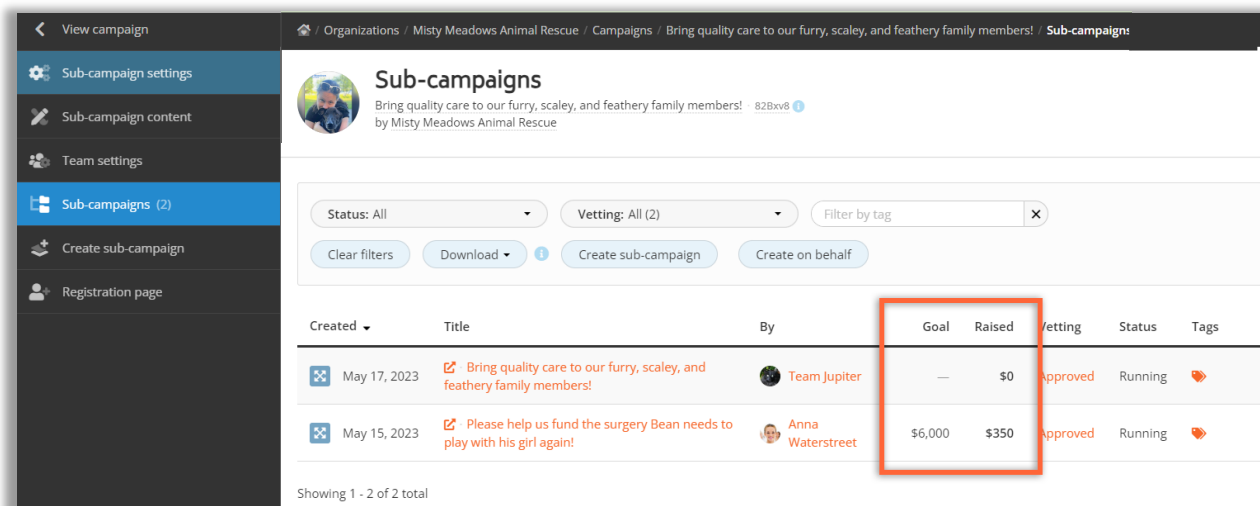
**Tip: Can't see the gear menu? Zoom out of your browser or click the expand button.**





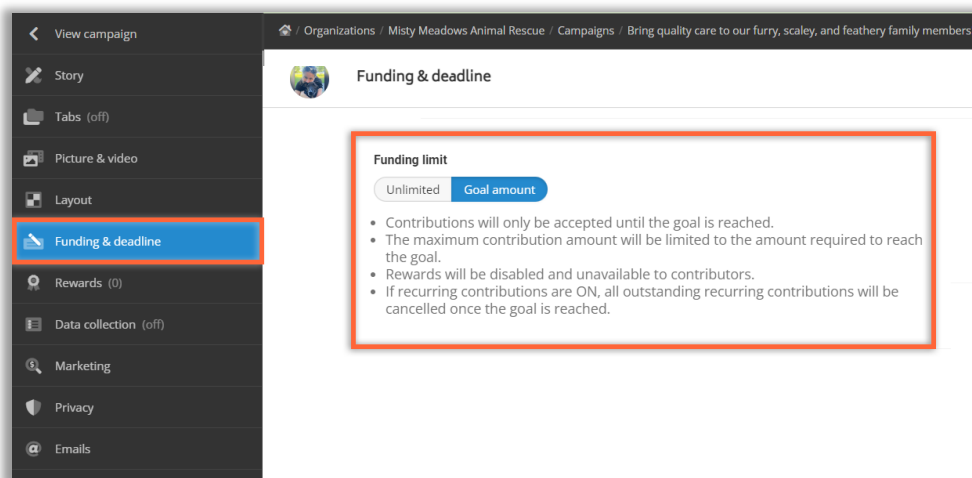
## How do we know when a sub-campaign is funded?

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.



## Can we ensure we do not raise more than the goal?

Yes. In the Edit menu of your main campaign, click “Funding & deadline,” then scroll to ‘Funding limit.’ Click *Goal amount*.



**Note for All-or-nothing campaign types: the funding limit will be 110% of the goal due to the nature of these campaigns. It’s common for approximately 10% of pledges to fail to go through as transactions.**