Peer-to-peer campaigns

A complete guide to set-up and management

FUNDRAISER HUB by connectionpoint

connectionpoint.com/fundraiserhub

Table of Contents

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Introduction

What is a peer-to-peer campaign?

Peer-to-peer (P2P) fundraising allows your community and volunteers to raise money on your organization's behalf. Interested people register on a main campaign and are given their own campaign (called a sub-campaign) to use and customize in order to raise money. All funds are given directly to the organization, your fundraisers don't touch the funds at all.

These campaigns are potent tools to engage your current supporters, acquire new donors, and raise more money for your cause. Most organizations choose the peer-to-peer model when they have fundraisers participating in an event, either individually or as a team. It's a terrific way to promote healthy competition! Those organizations not running an event, but still wanting outside fundraisers to raise money for them, may want to look at our **Do-It-Yourself fundraising model** (guide coming soon) instead.

Introduction

Who is this guide for?

If you are an organization wanting to host an event and invite members of your support network (current donors, volunteers, social media followers, etc.) to fundraise money in order to participate in your event, this guide is for you.

How to use this guide

If you know what peer-to-peer campaigns are and generally how they work - feel free to use the Table of Contents to peruse what's confusing you most and/or answer the questions you have as you go.

If you have never set up a peer-to-peer campaign before, and aren't quite sure how they work, we highly recommend you follow along with this guide from start to finish. This ensures you don't miss anything and gives you a thorough understanding of how to manage your campaign going forward.

Glossary

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Glossary

We want to ensure everyone is on the same page, so let's define some common terms:

Attribution	The association between a fundraiser and a contribution they inspired.	**Registration**	The act of filling out required information to create a sub-campaign and fundraise for an organization
Contribution	The monetary donation to a campaign	**Sub-campaign**	The second-tier campaign(s) listed *under* a main campaign.
Fundraiser	A participant (FundRazr user) in a peer-to-peer campaign, who registers to raise funds for an organization or group.	**Team sub-campaign**	A sub-campaign run by two or more fundraisers (users)
Individual sub-campaign	A sub-campaign run by a *single* fundraiser (user).	**Team Member**	A fundraiser (user) on a team sub-campaign
Main campaign	The top-tier campaign accumulating all funds and stats for the sub-campaigns under it.	**User**	A person with a FundRazr login who is utilizing the platform
Organization	The entity/group running the main campaign and sub-campaigns, which collects all funds.		

Structure of a Peer-to-Peer Layout

Structure of a P2P Campaign

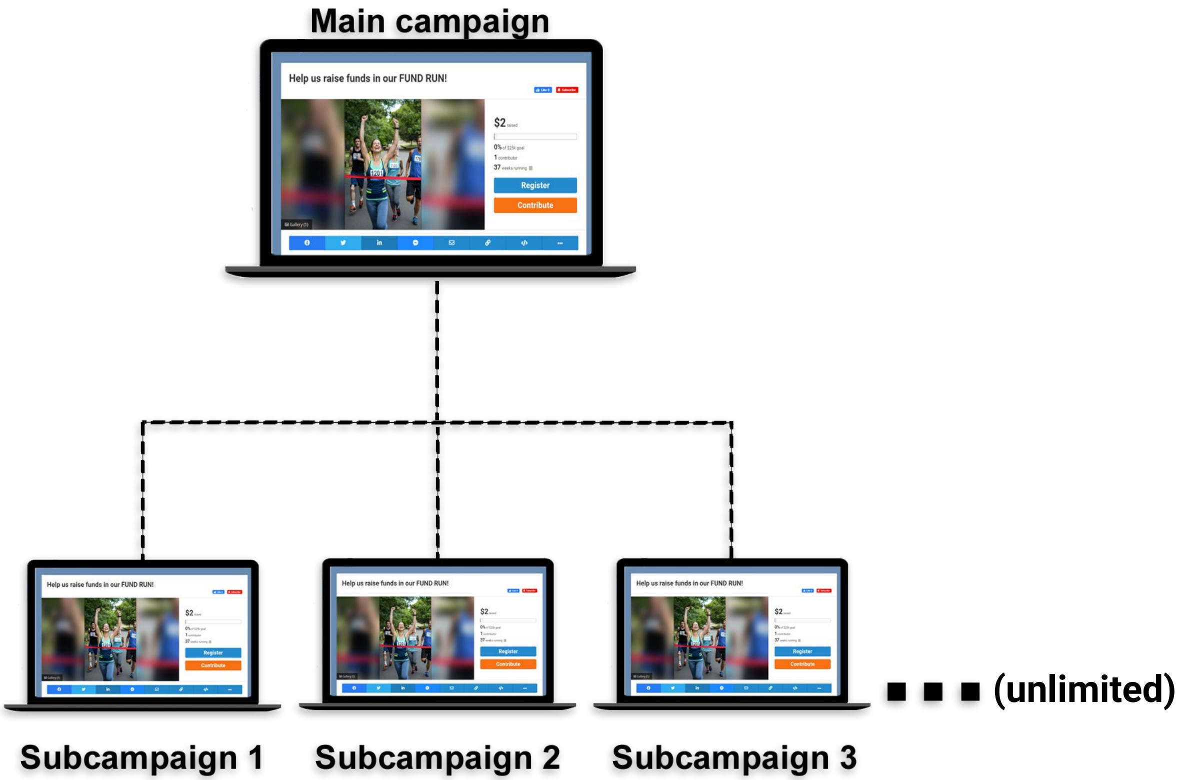
Peer-to-peer campaigns (as well as DIY and Microproject campaigns) have two tiers:

1. One main campaign that is set up by the organization as the first tier;
2. Mini campaigns (known as “sub-campaigns”) umbrellaed under the main campaign, each of which can be run by a different individual or team of individuals.

A main campaign can have as many sub-campaigns as needed; however, there can only ever be the two tiers. Meaning you can’t have a sub-campaign of a sub-campaign - we had to draw the line somewhere to prevent confusion!

Sub-campaign layouts look similar their main campaigns, they just do not have a ‘Register’ button. They also have varying allowances to their owners, depending on settings determined by the main campaign. For example, if you do not want your sub-campaign team members to add offline donations, you can set that as a rule (see page 36 of this guide).

Structure of a P2P Campaign



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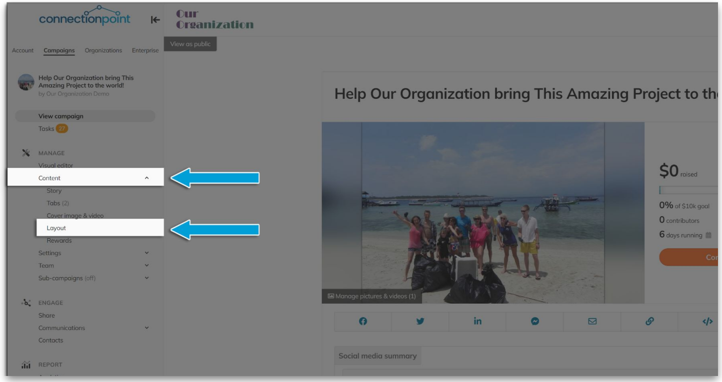
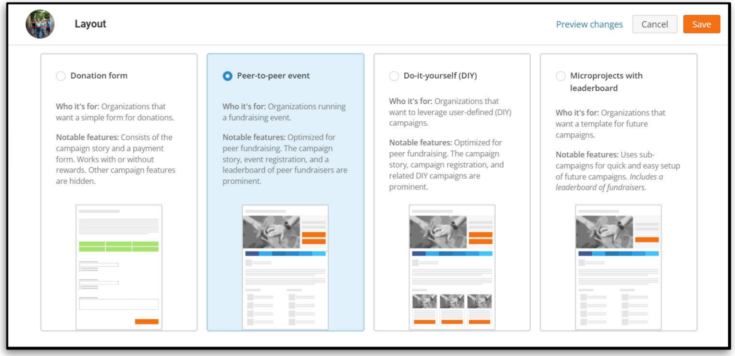
Choosing the Peer-to-peer Layout

Choosing the Peer-to-Peer Layout

1. [Create a campaign]
2. Click 'Content' and then 'Layout' in the navigation menu.



3. Choose 'Peer-to-peer event' and 'Save.'



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Choosing the Peer-to-Peer Layout

That's it! You now have a Peer-to-peer campaign!

What changing this layout does:

- Allows sub-campaigns to be created by your fundraisers;
- Enables the 'Registration' button above your 'Contribution' button (this is how fundraisers create those sub-campaigns);
- Switches the Leaderboard on in your main campaign (ordered either alphabetically or by who raised the most funds, depending on which you choose)

Individual vs Team Sub-campaigns

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Individual vs Team Sub-campaigns

What's the difference?

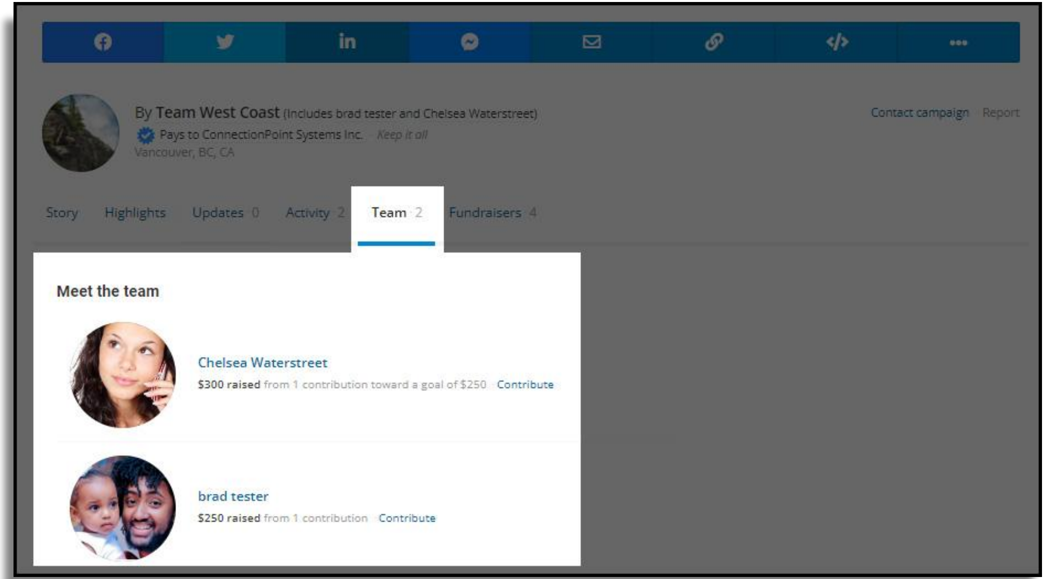
A common question with P2P campaigns is "What is the difference between an individual sub-campaign and a team sub-campaign?"

An **individual** sub-campaign is run by a single FundRazr user. If allowed (by either that user, or the organization running the main campaign), then any individual campaign can become a team campaign simply by adding another team member (see page 68 for details).

A **team** sub-campaign has more than one FundRazr user as a member. **Team members do NOT have their own sub-campaign; they share one.** However, each user can have contributions attributed to their user account, so you will know which team member inspired what contributions. These are shown under the 'Team' tab in your story (see next page). Any team sub-campaign can become an individual sub-campaign simply by removing all other team members (see page 72 for details).

Individual vs Team Sub-campaigns

What's the difference?



A team sub-campaign will have the 'Team' tab option in your story, showing the user accounts for members of that one team/sub-campaign, as well as what contribution amount they've inspired.

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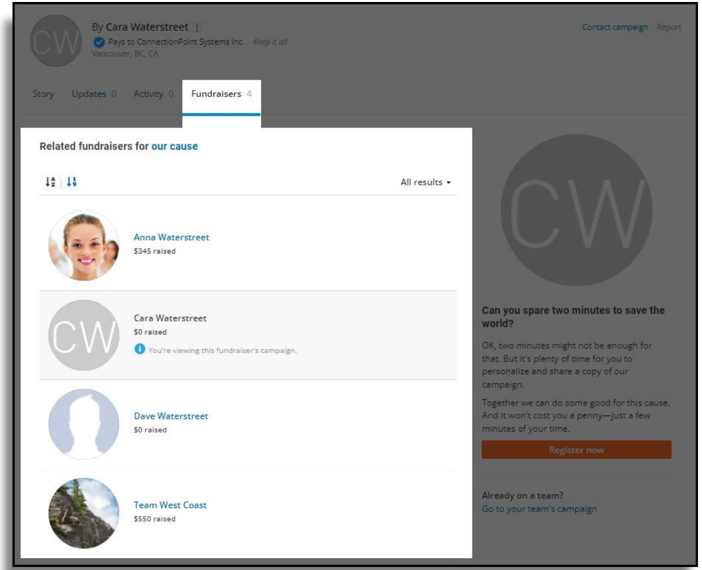
Individual vs Team Sub-campaigns

What's the difference?



An individual sub-campaign will have not have the 'Team' tab option, only the 'Fundraisers' tab, which shows ***all*** of the individuals/teams from the main campaign

Setting Goals

Setting Goals

Overview

There are THREE (3) types of goals in a Peer-to-peer campaign:

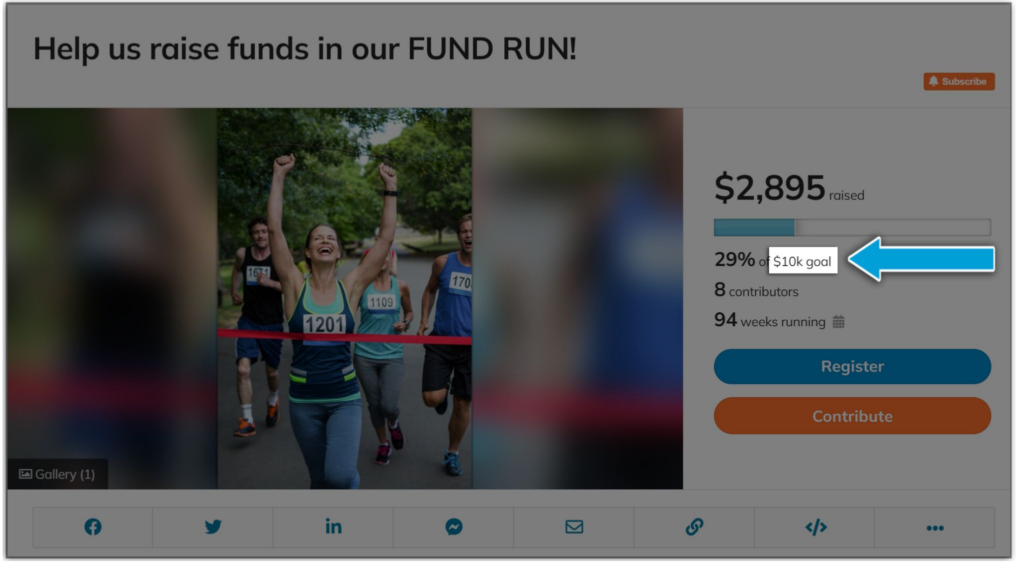
1. **Main campaign goal** - the overall monetary target for the entire campaign and event. All other goals (sub-campaign & team member) roll up into this amount.
2. **Sub-campaign goal** - the goal for a specific sub-campaign. Each sub-campaign can have a different goal, which can be linked to the sub-campaign's team members (or not).
3. **Team member goal** - each team member is an individual FundRazr user and chooses their own goal.

Setting Goals

Main campaign goal

What is your goal for this campaign, on a whole?

This goal will appear with your main campaign stats.



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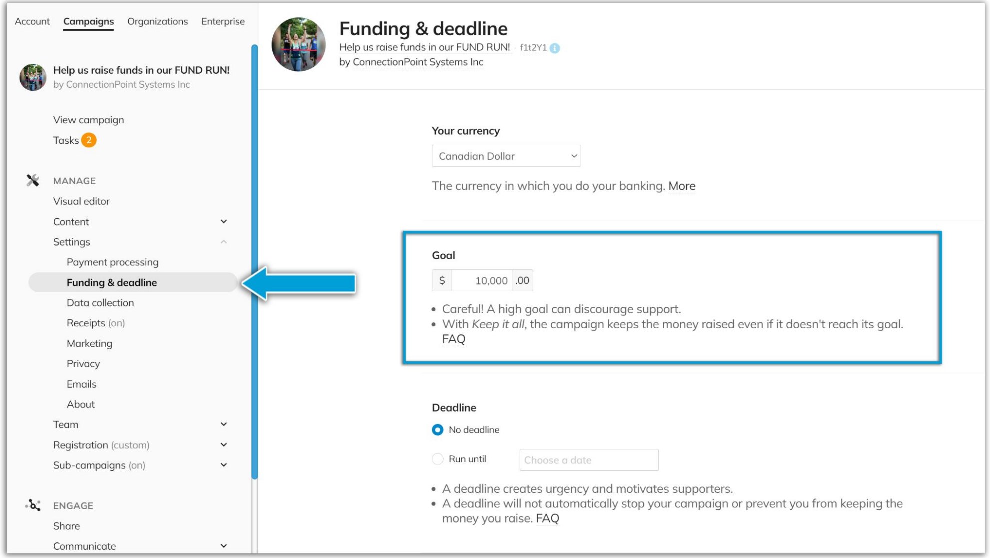
Setting Goals

Main campaign goal

You likely set this goal during the campaign creation flow. If you didn't, or if you'd like to change it:

Click 'Settings' and then 'Funding & deadline', then the goal is the second option.



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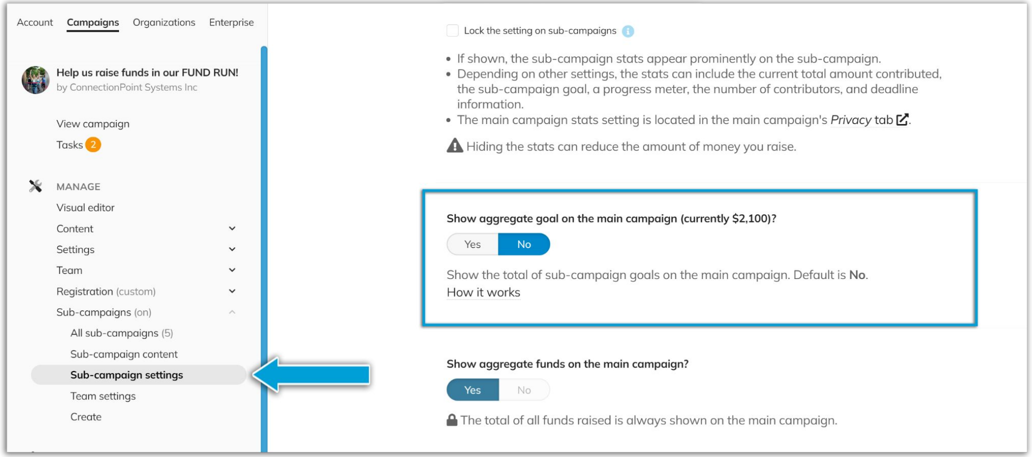
Setting Goals

Main campaign goal

You also have the option to have your main campaign goal be an **aggregate of your sub-campaign goals.** This feature is NOT recommended, however, as all it takes is one cheeky person inserting a goal of $50 million to destroy your campaign's credibility. There are use cases for everything, though, so here is how to set this feature if it will be of use for your campaign:

1. Click 'Sub-campaigns' and then 'Sub-campaign settings' in the navigation menu. Under '**Show aggregate goal on the main campaign**,' click '**Yes**.'



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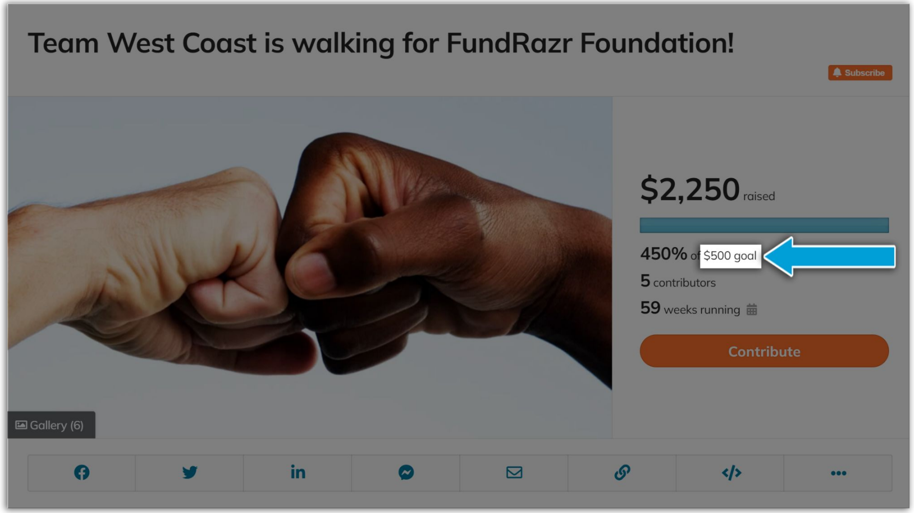
Setting Goals

Sub-campaign goals

What do you want each *sub-campaign* to raise?

This goal will appear in the sub-campaign stats and *may or may not be affected by the team-member goal*. This is a choice made by the organization running the main campaign (more on next page).



Setting Goals

Sub-campaign goals

There are two options for setting sub-campaign goals:

1. **Static goal** – the goal of every sub-campaign is not affected by any team members' goals
2. **Dynamic goal** – the goal of every sub-campaign will be a sum of the team members' goals for that particular sub-campaign.

And with each of these options, you can choose to 'lock' the goal or not:

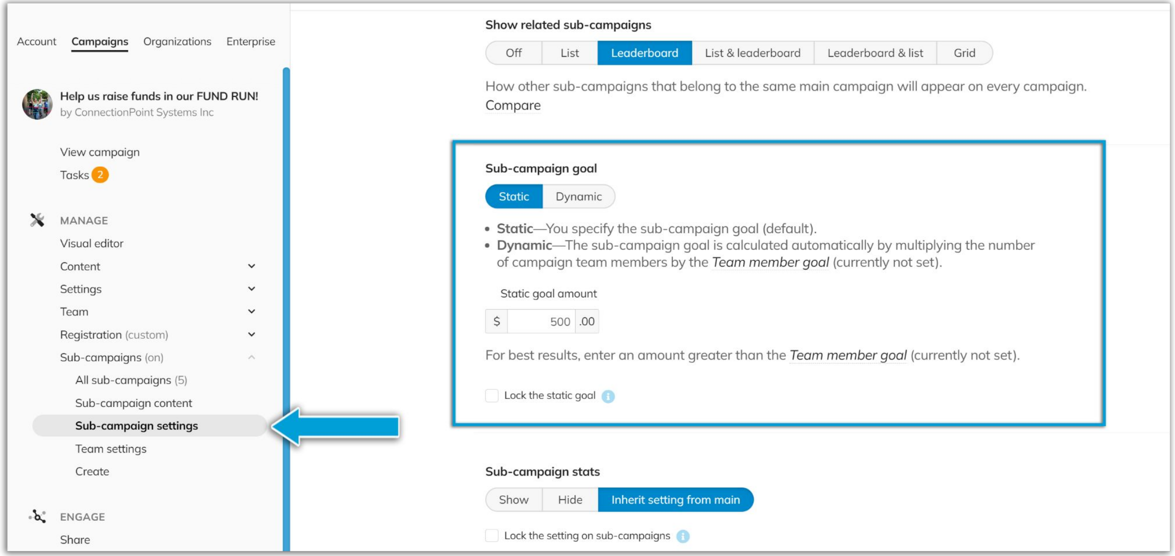
1. **Locked** - no team member of a sub-campaign can change the sub-campaign goal (they will always be able to change their own goal).
2. **Unlocked** - any team member of a sub-campaign can change the sub-campaign goal if they wish.

Setting Goals

Sub-campaign goals

To modify the sub-campaign goals, and choose between static/dynamic and locked/unlocked:

1. Click 'Sub-campaigns' and then 'Sub-campaign settings' in your navigation menu, scroll down until you see **Sub-campaign goal**, then make your choices. Don't forget to save!



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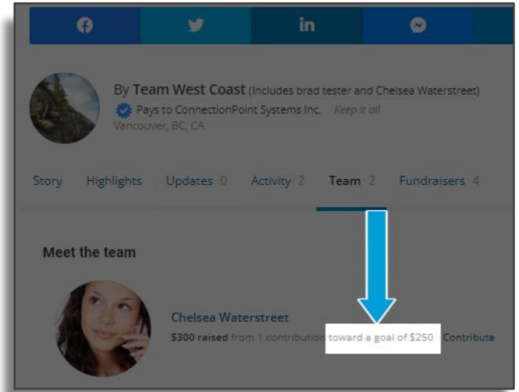
Setting Goals

Team member goals

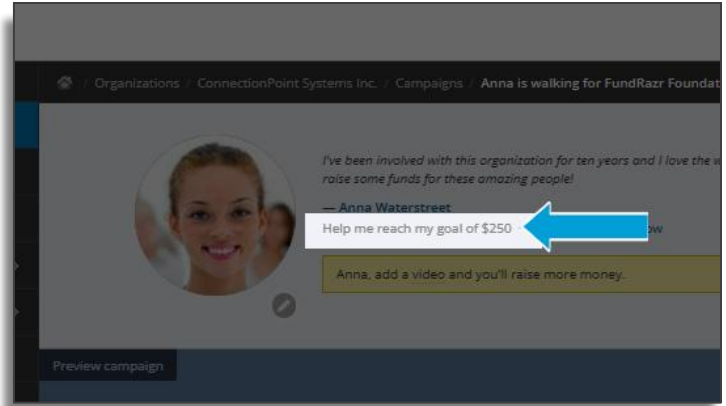
What should *each fundraiser* set as their personal goal?

This goal appears in the Teams list of a team campaign and in the personal message banner when someone clicks on the link that specific user shared.

Team's tab



Personal endorsement message



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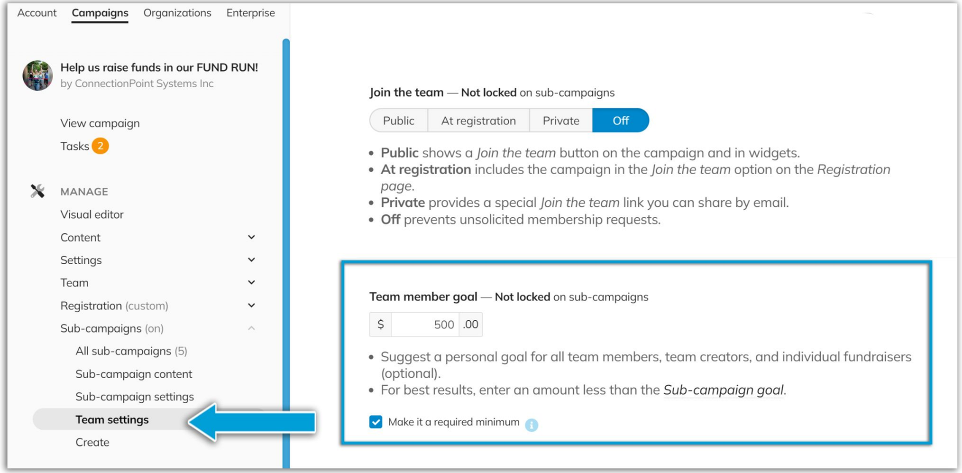
Setting Goals

Team member goals

You aren't obligated to set a team member goal here, but you should provide your fundraisers with a suggestion.

Team members can change their personal goal. You can insert a suggestion and make it a required minimum (where the fundraiser won't be able to enter an amount lower than your suggestion), but they will always be able to enter a higher amount. If you do NOT make it a required minimum, fundraisers will see your suggestion in the registration flow, but can choose to enter a lower amount.

1. Click 'Sub-campaigns' and then 'Team settings.' You'll see '**Team member goal**' with the option to '**Make a required minimum' below**. Then click 'Save' in top right corner.



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Preparing Sub-campaigns

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Preparing Sub-campaigns

Just as you prepare your main campaign with a title, story, and layout, you can set up sub-campaigns to stay in theme and on brand.

What this includes:

- Title templates
- Formatting a section of the story to appear on all fundraisers' sub-campaigns, which they cannot change.
- Choosing how your sub-campaigns are displayed on the main campaign
- Selecting allowances (e.g. do you want to allow fundraisers to enter offline contributions?)

Preparing Sub-campaigns

Title templating

Set a custom title to be automatically applied to every sub-campaign.

Sub-campaign managers will always be able to change their title. What you'd like to keep as titles is all in how you communicate expectations with your fundraisers. For what is automatically applied to their campaigns, you have two choices:

- Have all sub-campaigns inherit the main campaign title
- Set a custom title template that can include the name of individual fundraisers or teams

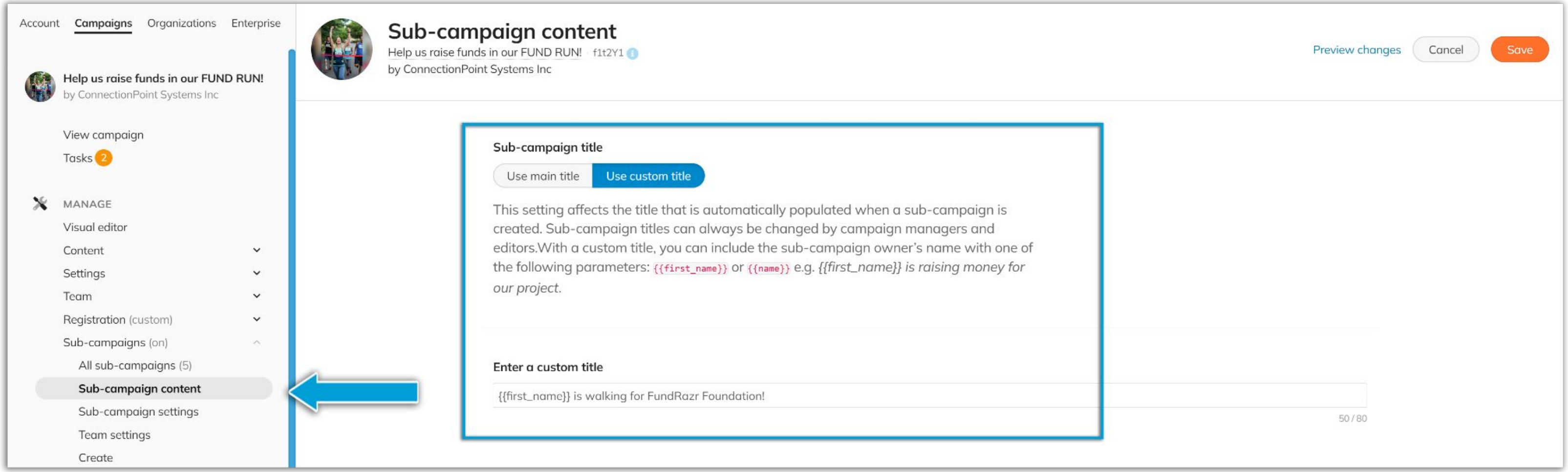
  Choose {{first_name}} to only pull an individual's first name and choose {{name}} to pull their first and last names. Either option will always pull team names as "Team (whatever they choose their team name to be)".

(Screenshot on next page)

Preparing Sub-campaigns

Title templating

Click ‘Sub-campaigns’ and then ‘Sub-campaign content’ to set your sub-campaign title template.



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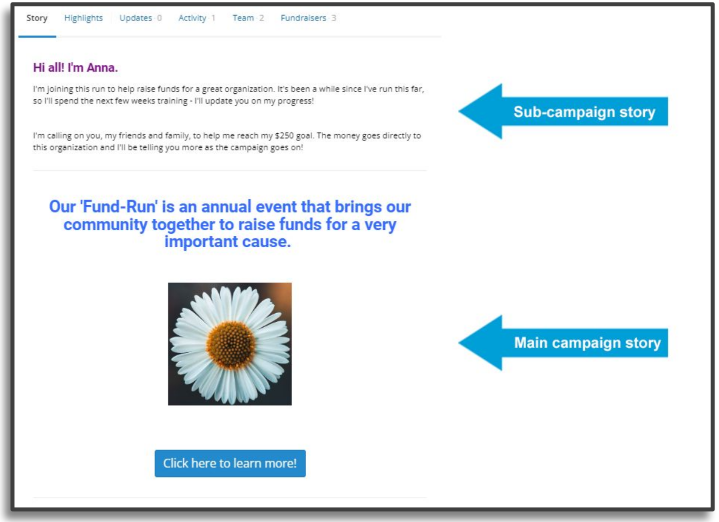
Preparing Sub-campaigns

Stories

Make sure the right details are told by including a custom-written story in every sub-campaign.

This story appears below the fundraiser's story (if they write one).



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Preparing Sub-campaigns

Stories

What goes in the main story versus the sub-campaign story?

Main campaign Story

Here, you're talking to your *fundraisers*. The details they want to know include:

- Your campaign story (for help with campaign story writing, watch this video);
- Reasons why the reader should *fundraise* for you;
- How to register, including any guidelines or special tips they'll need to know during the process (e.g. Start by hitting that big 'Register' button!);
- Logistics of the event itself (Date, time, location, etc.);
- Miscellaneous information (prizes, fees, rewards for participating, etc.)

Sub-campaign Story

Here, you're talking to your *donors*.

They want to know your campaign story.

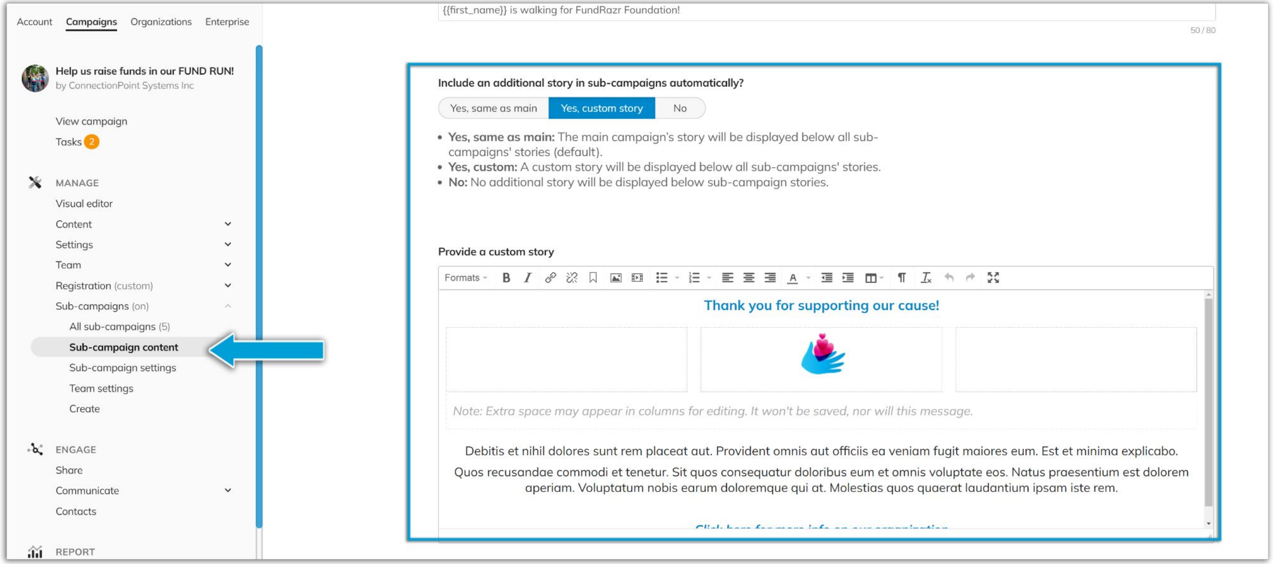
For guidance, watch this video.

Preparing Sub-campaigns

Stories

How to set up these two stories.

1. Click ‘Sub-campaigns’ and then ‘Sub-campaign content.’ You’ll see ‘**Include an additional story in sub-campaigns automatically?**’; click ‘Yes, custom story,’ then enter the customized story in the story editor below. Click here for assistance with the story editor.



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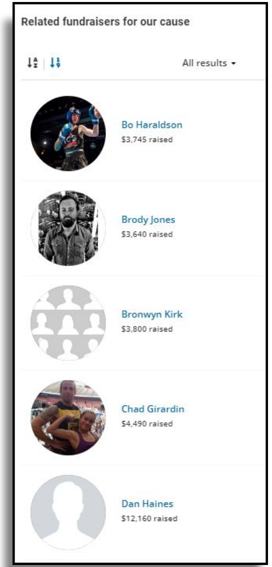
Preparing Sub-campaigns

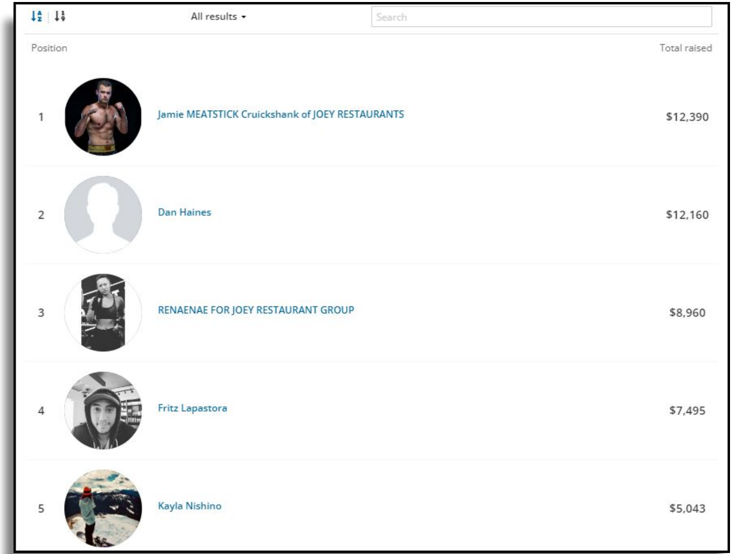
List or Leaderboard?

Your fundraisers' sub-campaigns can be displayed in your main campaign as a *List* and/or a *Leaderboard*.

LIST: Individuals and teams ordered alphabetically.



LEADERBOARD: Individuals and teams ordered by who has raised the most funds (updated in real-time).

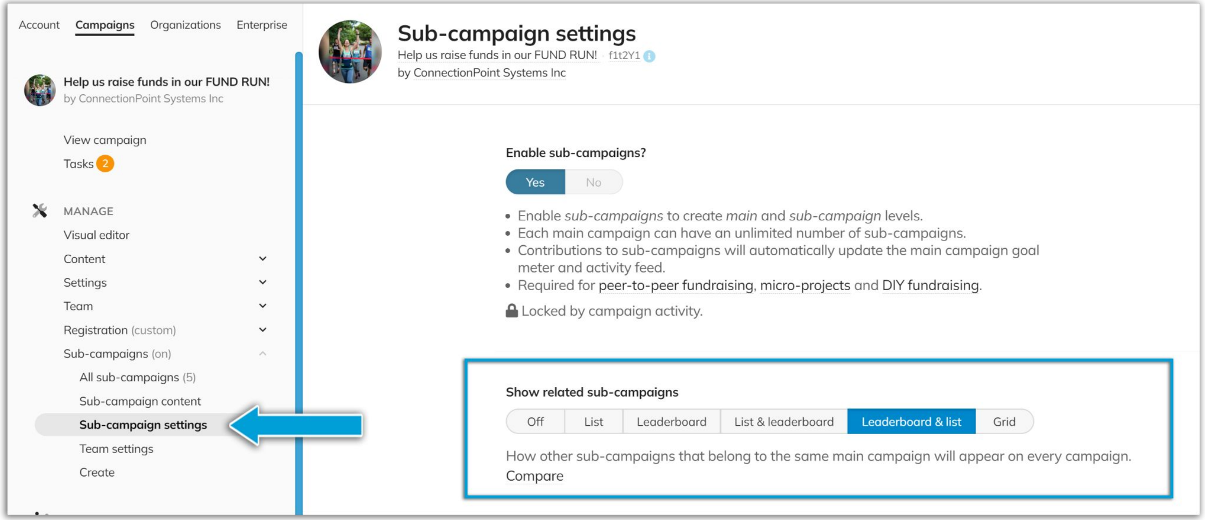


Preparing Sub-campaigns

List or Leaderboard?

You can choose to have ONLY a List or a Leaderboard… OR the ability to toggle between both.

Click ‘Sub-campaigns’ ‘Sub-campaign settings’ you’ll see ‘Show fundraisers on the main campaign.’ Make your choice here, as well as how you’d like to display them on sub-campaigns as well.

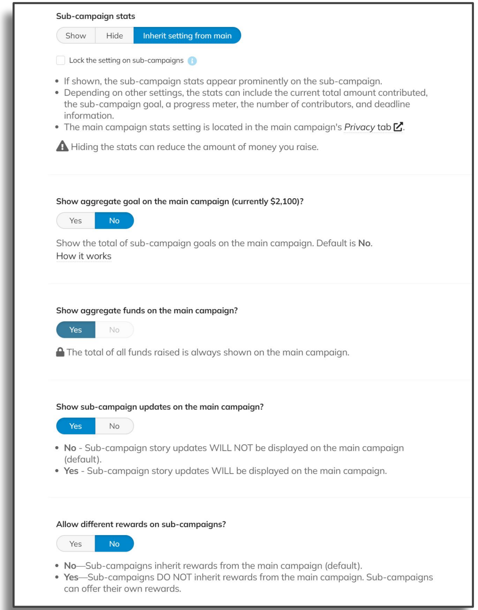


Preparing Sub-campaigns

Other permissions

Be sure to inspect the other options in your sub-campaign settings and choose what's right for you.

Under 'Sub-campaign settings' are many other options to hide or include certain information and allowances:



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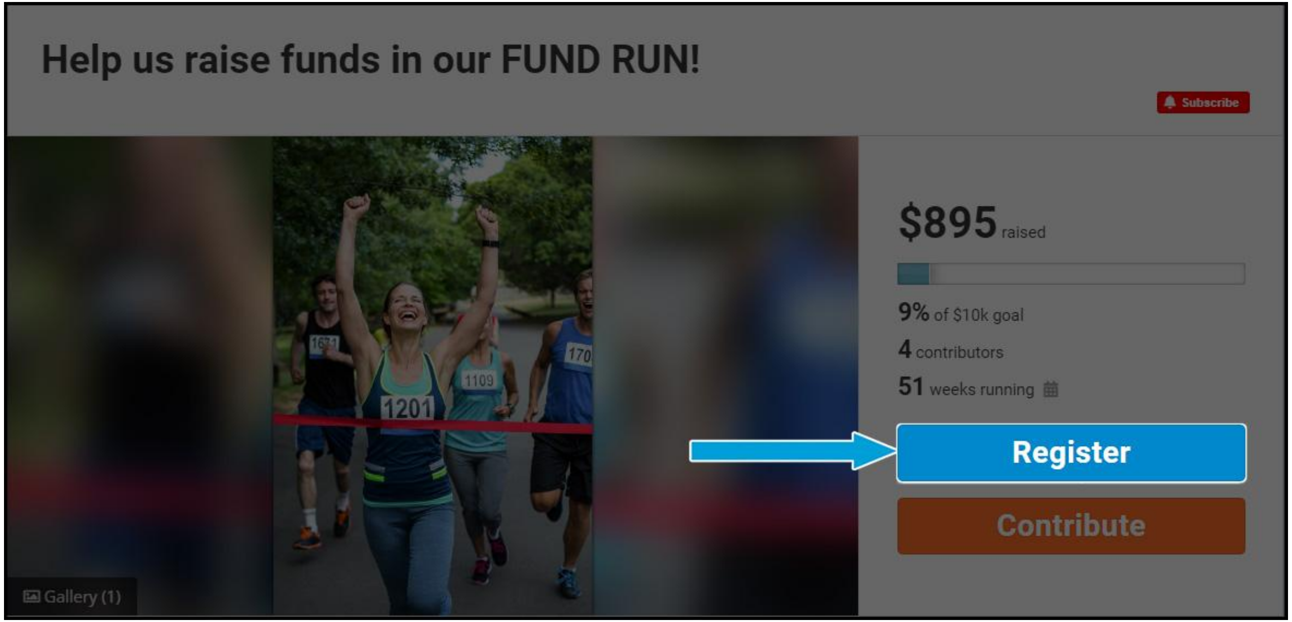
Registration

The Registration Form

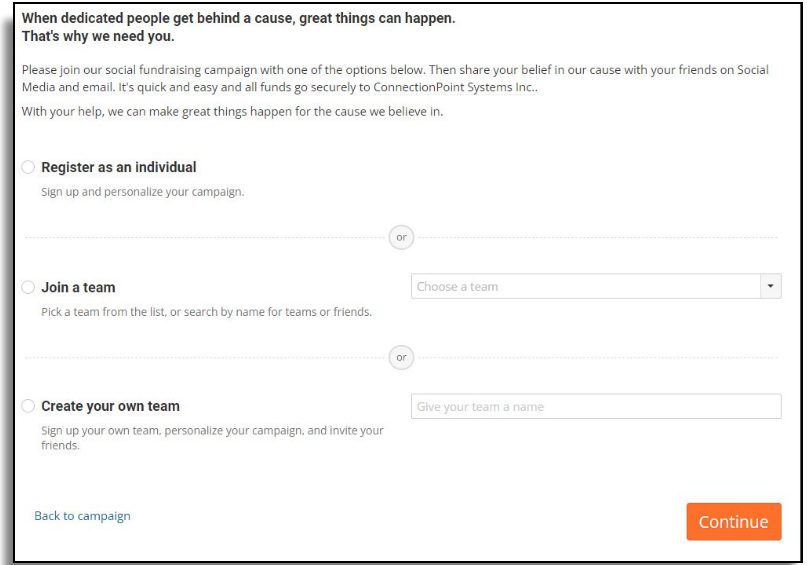
In order to create a sub-campaign under your main campaign, a fundraiser must register onto it. Direct them to click the Register button in the stats of the main campaign:



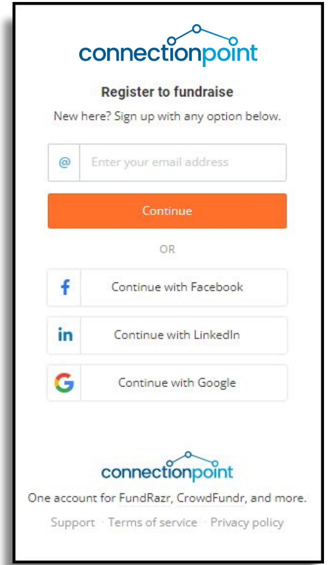
The Registration Form

The basic form

With *no customization*, the registration process is as follows:



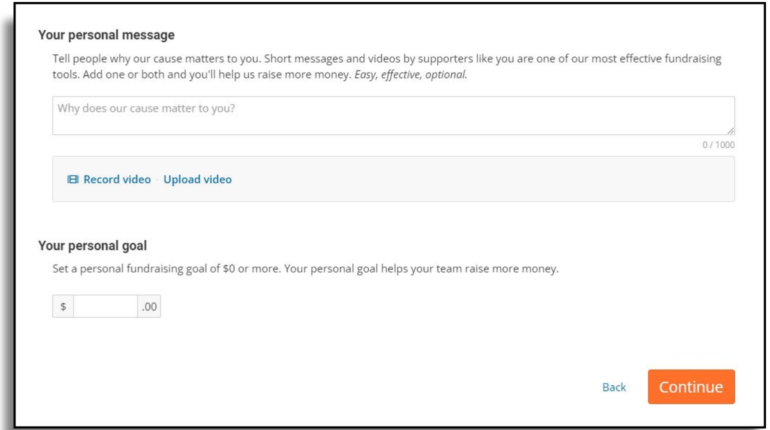
Step 1: Choose individual or team campaign



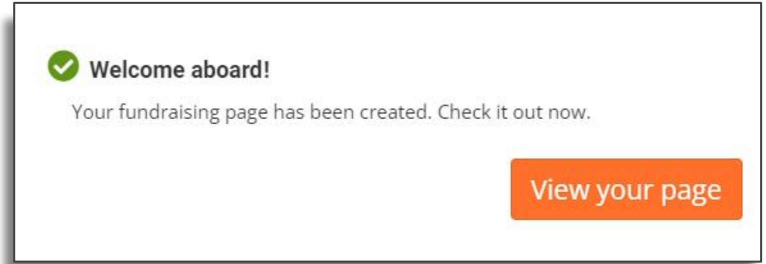
Step 1a: If the fundraiser doesn't have a FundRazr user profile, they will be prompted to create one.

The Registration Form

The basic form



Step 2: Write/record a message and choose a goal.



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

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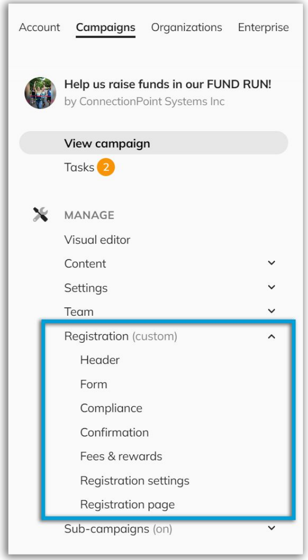
The Registration Form

Customizing registration

ConnectionPoint collects all ***Names*** and ***Emails*** from fundraisers, which you will have access to. If this is all the information you require from your fundraisers, then there is nothing you need to do in the form field itself. However, if there is other information you want to collect, and/or you want to make the form a bit more visually appealing and branded, you can custom the entire form in the Registration Menu (found in your **main campaign's** navigation menu). We'll go over each of the options in this menu together.



The Registration Form

Registration Settings - Individual and/or teams?

At registration, you can choose to allow your fundraisers to:

A. Create an individual campaign only
B. Create a team campaign or join an existing team campaign
C. Join an existing team campaign only (no option to create a team)
D. A & B
E. A & C (where you as the main campaign manager create the teams to join yourself)

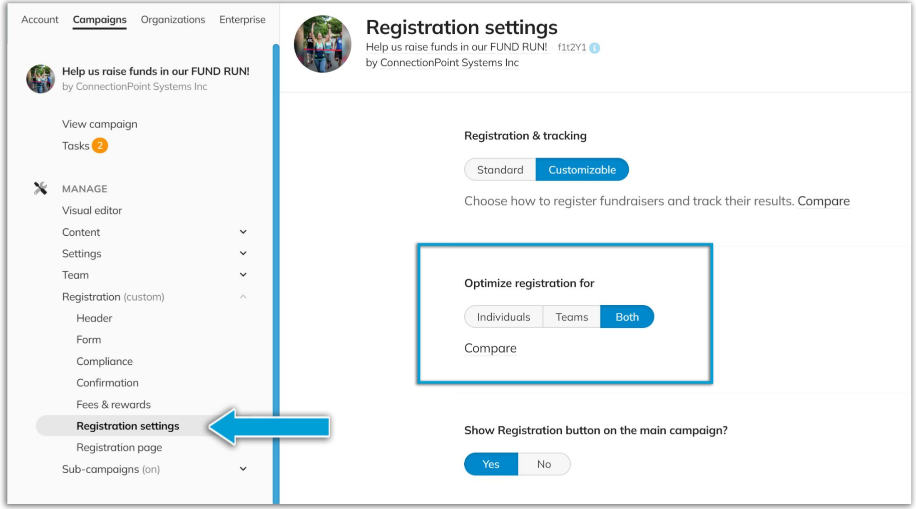
(Continued on next page)

The Registration Form

Registration Settings - Individual and/or teams?

To choose whether you'll allow only individual fundraisers, only teams, or both (default):

1. Click 'Registration' and then 'Registration settings' in your navigation menu. Choose your option to '**Optimize registration for…**' then 'Save.'



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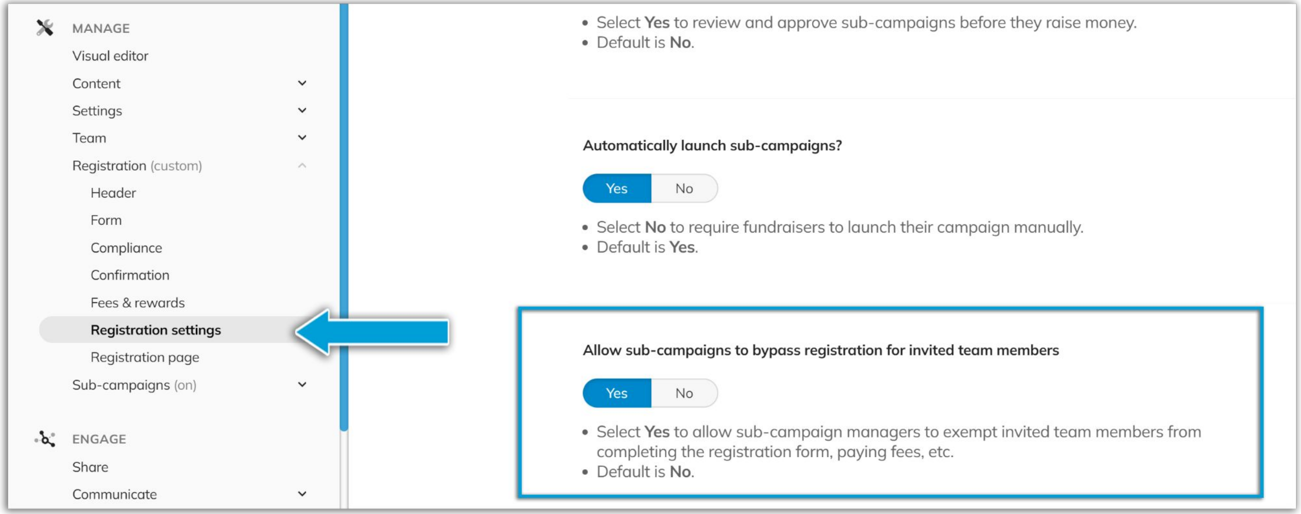
The Registration Form

Registration settings - Bypassing registration (Teams only)

Do you need *everyone* on a team to register, or just one person?
If not, you have an option to allow *invited team members to* bypass the registration process.

Under 'Registration settings,' scroll to '**Allow sub-campaigns to bypass registration for invited team members**' and choose 'Yes.'

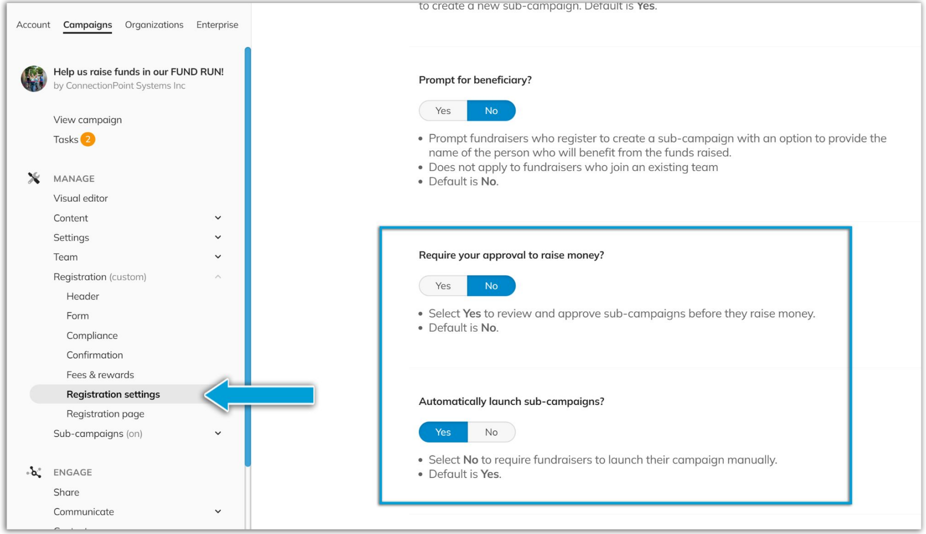


The Registration Form

Registration settings - Approval & launch

Do you want to approve sub-campaigns before they launch? Do you want sub-campaigns to launch automatically, or wait to be launched manually by yourself or your fundraisers?

Under 'Registration settings,' scroll to '**Require your approval to raise money?**' Directly under is the '**Automatically launch sub-campaigns**' options. Make your choices, then click 'Save' in the top right corner.



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The Registration Form

Header content

Best practice: customize your header to welcome your fundraisers!

The header is the first thing a new registrant will see, appearing over the options to choose an individual or team campaign. The FundRazr default looks like this:

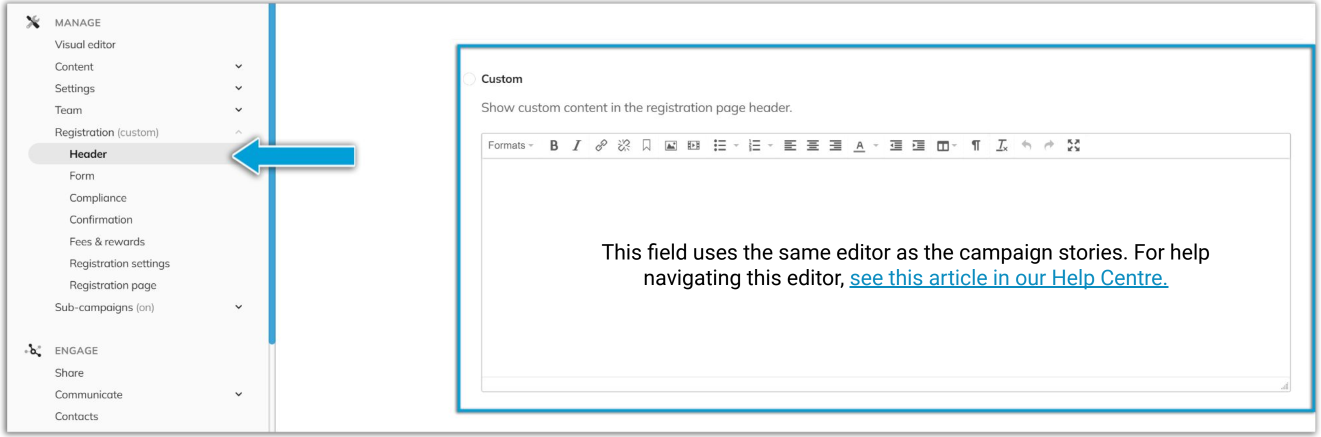
> **When dedicated people get behind a cause, great things can happen.**
> **That's why we need you.**
>
> Please join our social fundraising campaign with one of the options below. Then share your belief in our cause with your friends on Social Media and email. It's quick and easy and all funds go securely to ConnectionPoint Systems Inc..
>
> With your help, we can make great things happen for the cause we believe in.

The Registration Form

Header content

You may of course keep our default, however, customizing allows you to explain any potentially confusing areas of your form, plus helps assure registrants they're in the right place. We recommend including:

- Your organization logo
- Registration instructions, such as:
    - Expectations for participation (e.g. Do they have to hit their goal to participate in the event?)
    - Goal suggestions/requirements
    - Team information (if applicable)
    - FAQs, etc.

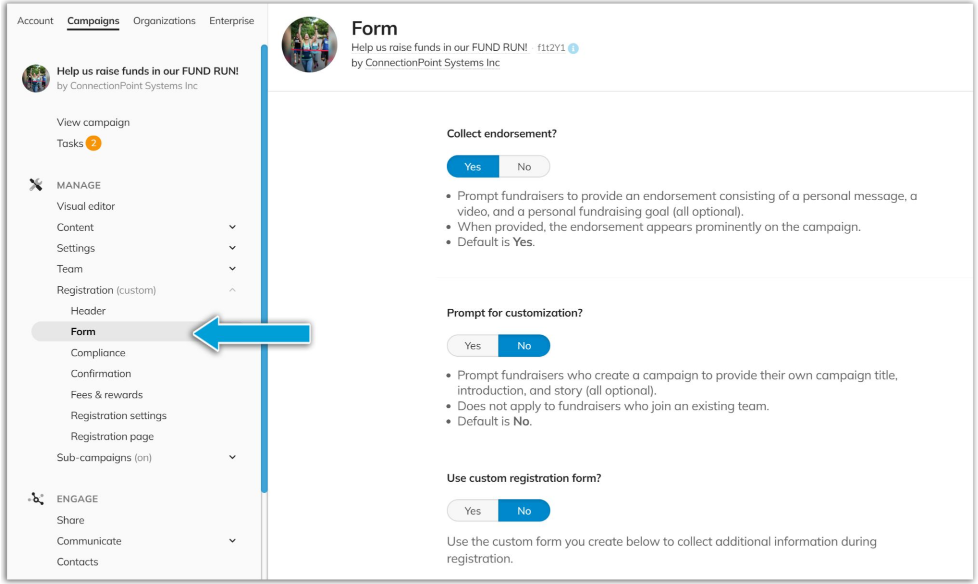


The Registration Form

Registration form builder

Request any information you need from your fundraisers!

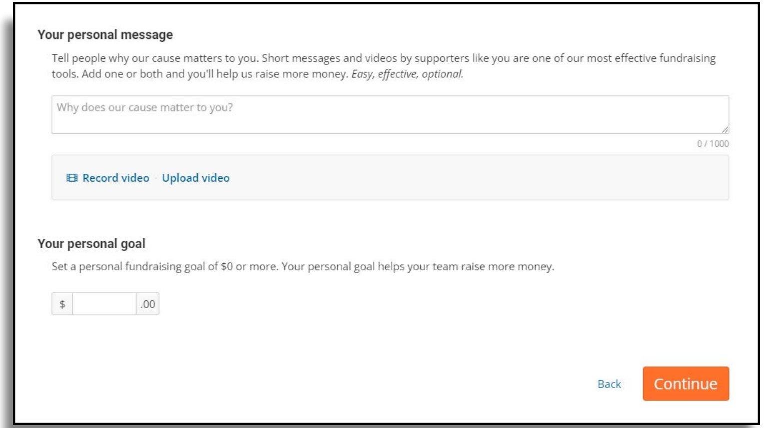
First let's explain the different options in the 'Registration form' section of this menu:



The Registration Form

Registration form builder

The endorsement message is the *personal message* that appears at the top of a team member's campaign page. It shows their user photo, this message, a video recording if they've chosen to do so, and their personal monetary goal for the campaign. In the registration flow, it's asked along with the team member goal.

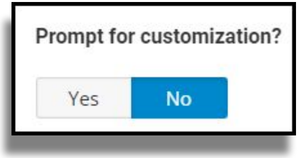


It's important to note that choosing 'No' for this option **will not remove the ability for team members to have a personal message on the campaign.** It will only remove asking for it from the registration flow.

There tends to be confusion about when this message appears. Please see page 84 of this guide for more information.

The Registration Form

Registration form builder



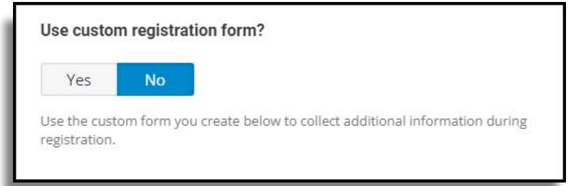
This setting is asking if you want your fundraisers to go through the **campaign creation flow** to customize their sub-campaign with title, story, pictures, etc. They will have the ability to edit all of this whether you choose 'Yes' or 'No'; however, some organizations find that their fundraisers don't make this effort (even with all of the guidance in the world!), so they choose to include this in the registration flow.

Yes, customizing their campaign increases their chances of success. Whether they are prompted for that customization in the registration flow or not is up to this setting. If you choose to leave this setting at its default 'No', you can provide your fundraisers with our Fundraiser Success Guide, which takes them through these customizations after their sub-campaign has been created.

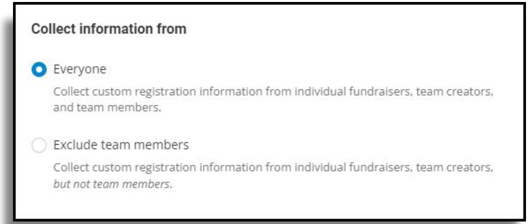
Actually, you should provide that guide to your fundraisers no matter which of these settings you choose!

The Registration Form

Registration form builder



Time to get into the details of the custom registration form itself. First thing is, you **have to tell the platform that you want to use the custom form you have created.** If you put custom info into the field below this option (see next page of this document), you're happy with what you have, and you want it put into the registration flow, then turn this option to 'Yes.'



Team sub-campaigns only: Do you need this custom form information from *every* team member? Or is just the team leader enough?

If you choose the 'Exclude team members,' only the fundraiser who created the team will be prompted to fill out your custom form.

The Registration Form

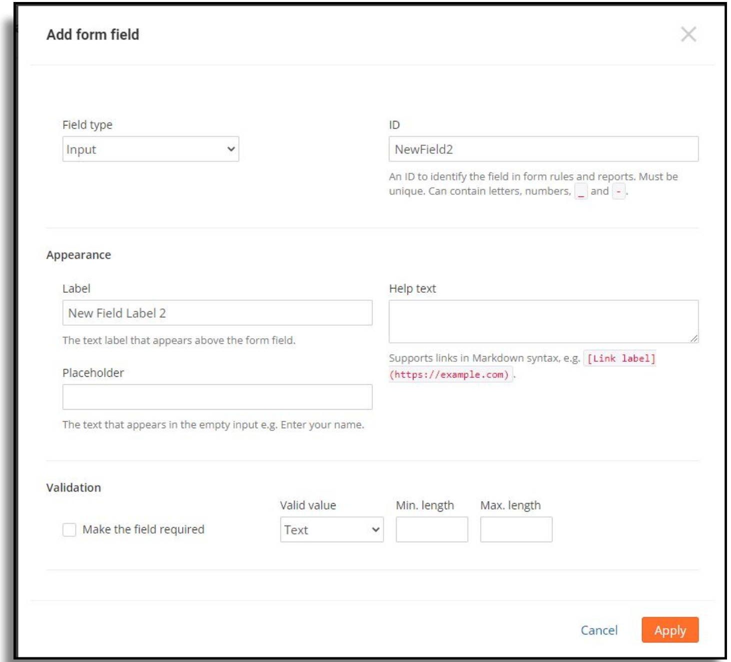
Registration form builder

Add your first form field: Insert a new customized field. After one field is created, you can choose the next field to appear to the right of the current field, or below it.

Form rules: Create directions for certain fields. For example, say you're hosting a hybrid event (virtual and in-person options), where food will be provided for in-person attendees. You can have a form field asking the registrant if they are attending virtually or in-person, and another field asking for dietary requirements. Then, set a rule stating that the dietary requirement field should only appear if the 'in-person' field is checked. Think of the coder's mantra: "If this, then that!"

The Registration Form

Registration form builder



- **Field type** - see next page of this guide for descriptions.
- **ID** - the name of the column this form field will populate in your downloaded spreadsheet (see page 66 of this guide for more details).
- **Label** - what the field will be called in the form.
- **Help text** - examples given to your registrants, which will appear *under* your form field as a guide.
- **Placeholder** - another guide, but this one appears *in* the field itself and the registrant overrides it with their answer.
- **Make the field required** - if this box is checked, the registrant will not be able to move forward in the process until the field is answered
- **Valid value and length** - set your requirements for this field.

NOTE: these options all change when you change the field type. 'Input' is the most commonly used.

FUNDRAISER HUB by connectionpoint

The Registration Form

Registration form builder

Field types

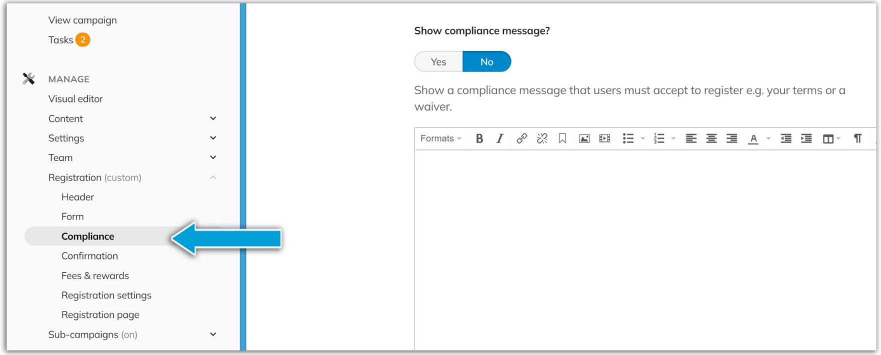
- **Input** - answer can be different types of characters, but all must be physically typed in by the registrant
- **Text area** - answer can only be textual characters.
- **Select** - registrant answers by choosing **one** option from a dropdown list
- **Checkboxes** - multiple answers can be selected (i.e. multiple boxes are 'checked')
- **Radio buttons** - only one option can be selected (i.e. only one button can be selected)
- **File upload** - registrant can upload a picture or document
- **Rich text** - you as the campaign manager can use the rich text editor to custom write anything you like. This editor is the same as the campaign story editor.
- **Terms/Waiver** - would you like registrants to agree to or sign in agreement to a message?
    - *You can also include this option *outside* of the custom form. See next page.

The Registration Form

Compliance message

Choose to have your fundraiser agree to your terms and conditions, sign release forms, or simply acknowledge they received the necessary information.

This is the more detailed option than its counterpart in the custom registration form. This message will appear *after* your custom form (if applicable), not *with* it. You can even link to an external waiver if you like - which will open in a new window. Note: If you choose for a signature NOT to be required, the fundraiser will simply have to click an 'Agree' button to continue with registration.



This section uses a rich text editor, like the campaign story. Click here for help navigating the editor.

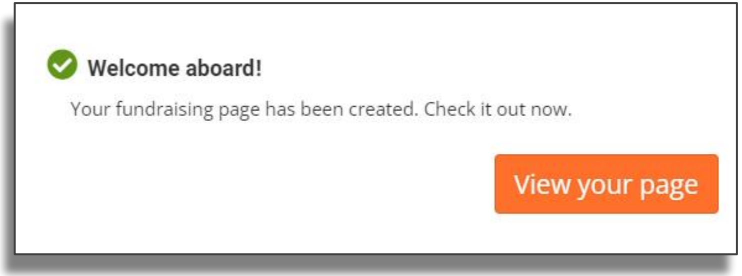
FUNDRAISER HUB by connectionpoint

The Registration Form

Confirmation message

Like the Header message, your confirmation message should be customized!

Without customization, your final message will look like this:

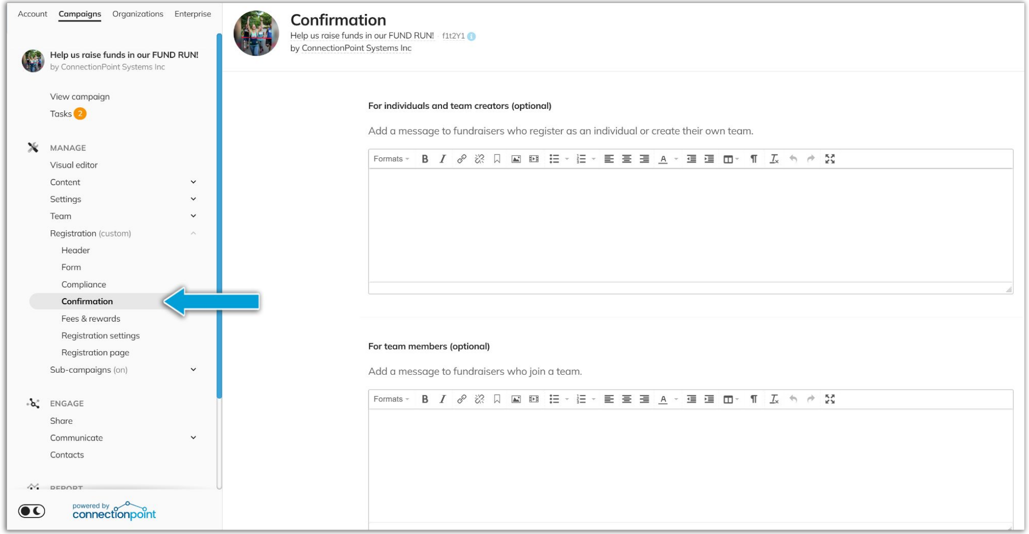


While this is perfectly *fine*, you're aiming for better than fine. We recommend you insert your logo again, put in a more personal thank you, and let your fundraisers know what's next: pay a fee, customizing their pages, etc.

***Note, if you have a registration fee, the button will say 'Pay fee' instead of 'View your page.'**

The Registration Form

Confirmation message



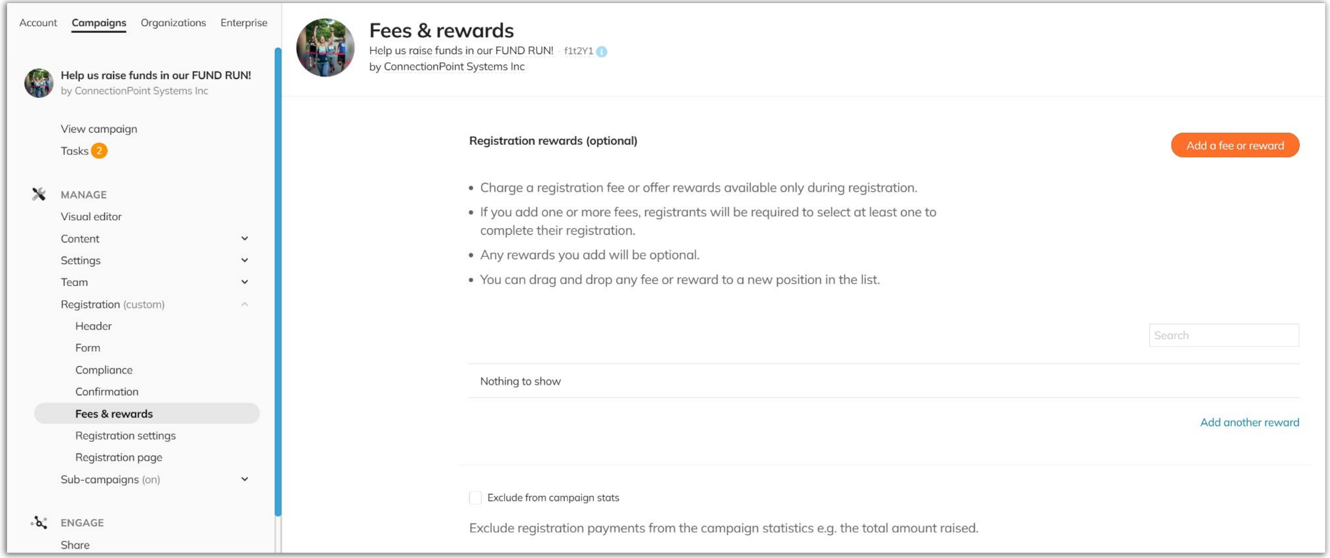
You can send different messages to individual & team leaders than the ones to team members, if applicable. If you have the same message for both, **copy and paste to populate both fields.**
This is the same rich text editor as the campaign story edits. Click here for assistance with this editor.

The Registration Form

Fees & rewards

Insert a registration fee or a customer reward (for registrants only).

Click ‘Add a fee or reward’ to begin.

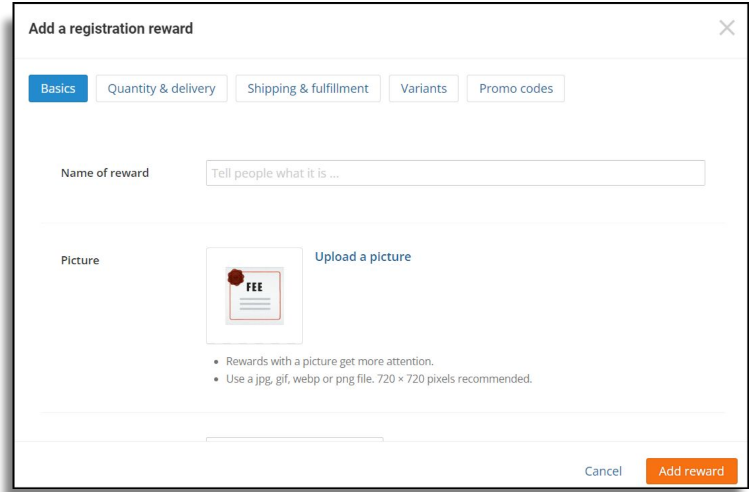


FUNDRAISER HUB by connectionpoint

The Registration Form

Fees & rewards

Fee or reward?!



- **Fee** - registrant pays to complete their registration into the campaign. Fees are **mandatory** for fundraisers.
- **Reward** - registrant can choose to receive (or gift) a reward item (wish, perk, product, or ticket). These are **not mandatory** for fundraisers.

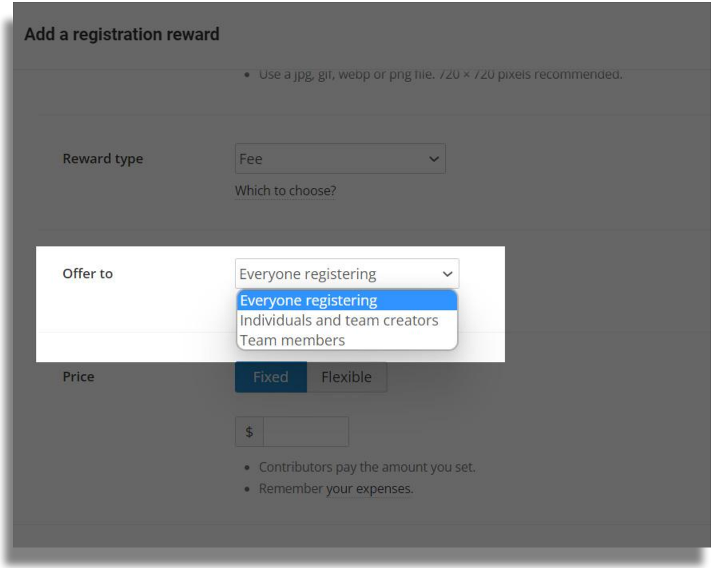
For more information on Rewards and this editing menu, please view this article.

These fees and rewards will ONLY be available to fundraisers. They will NOT appear on any of the campaigns.

The Registration Form

Fees & rewards

How it works



Fees are **mandatory**. If there's only one option, the fundraiser has to choose it. If there are multiple options, they have to pick **one**.

The fields in the fee/reward creation menu are fairly self explanatory. If you find yourself stuck, please view this article.

However, there is one added option for this situation: **who are you offering the fee to?**

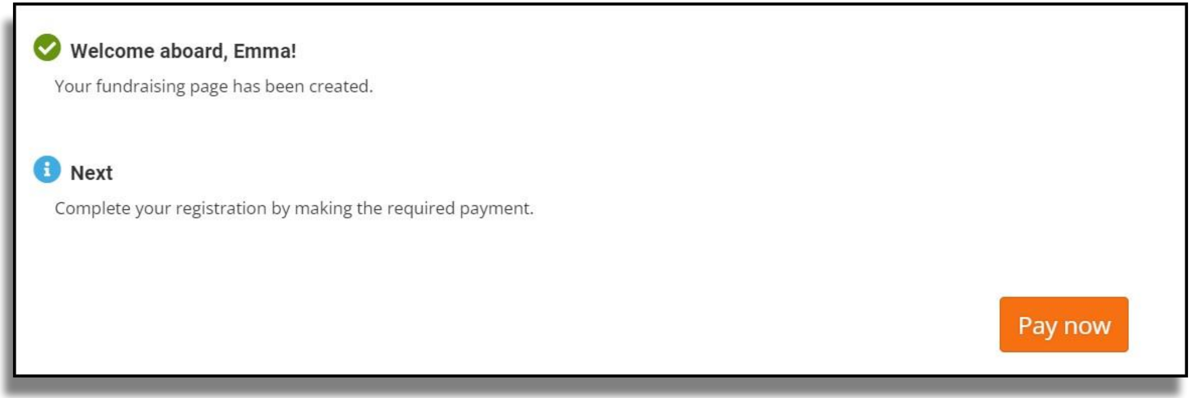
If you have different fees for teams and individuals, then this is your option to differentiate. You can choose to only offer fees to Individuals and Team creators, and then have two choices for fees (individual and team), so that a registering team will only pay the team fee once (and their first challenge as a team will be to work out how to repay the captain 😉)

The Registration Form

Fees & rewards

How it works

When fees are included, the fundraiser will see a ‘**Pay now**’ button instead of the ‘**View my campaign**’ button in their confirmation message:

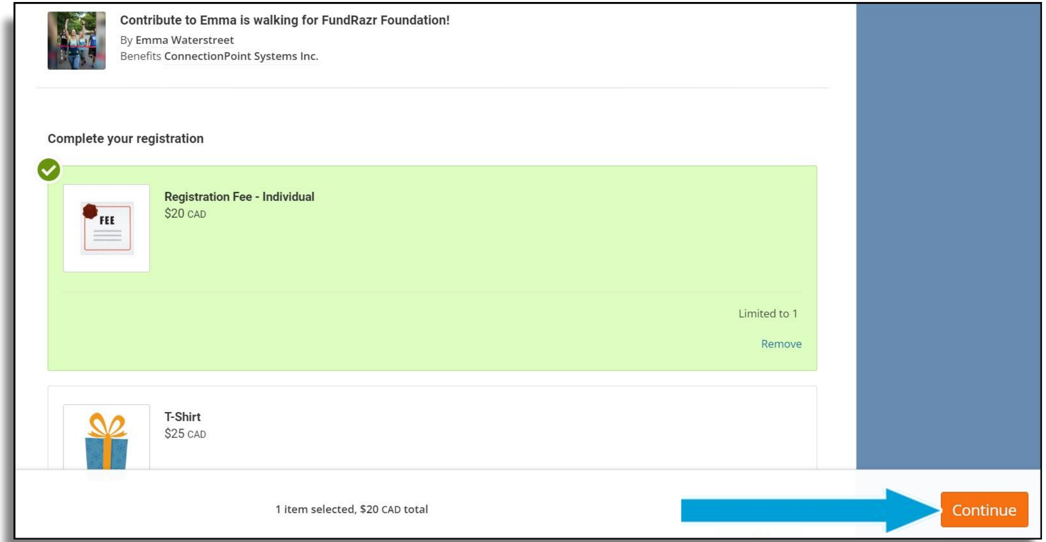


The Registration Form

Fees & rewards

How it works

They can then choose their fee, along with a reward (if applicable, and if they want to as rewards are always optional). Once they've chosen, **they must hit 'Continue' at the bottom right hand side of the screen**:



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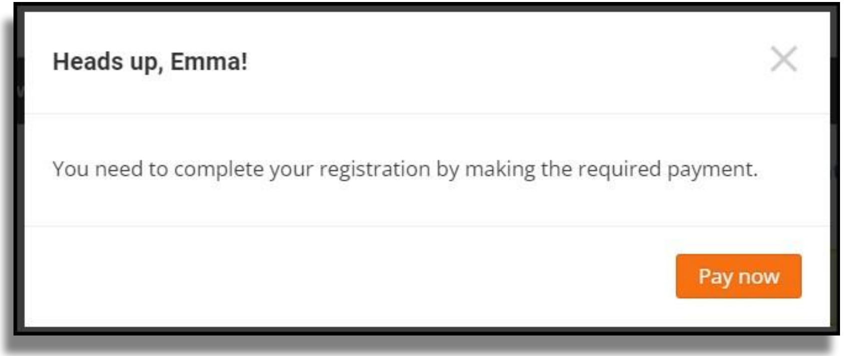
The Registration Form

Fees & rewards

How it works

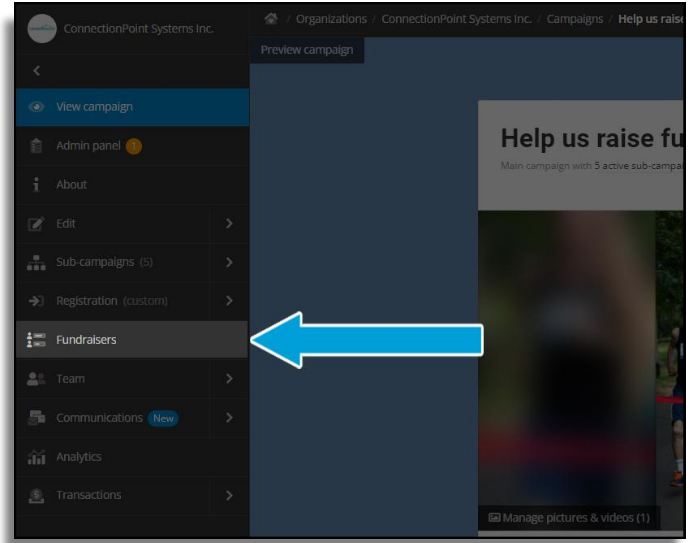
If a fundraiser accidently cancels during registration or loses web service in the middle of paying their fees, their campaign is already created. However, they will be reminded every time they log in. You can turn off this prompt if you like (see page 66).



Managing Fundraisers

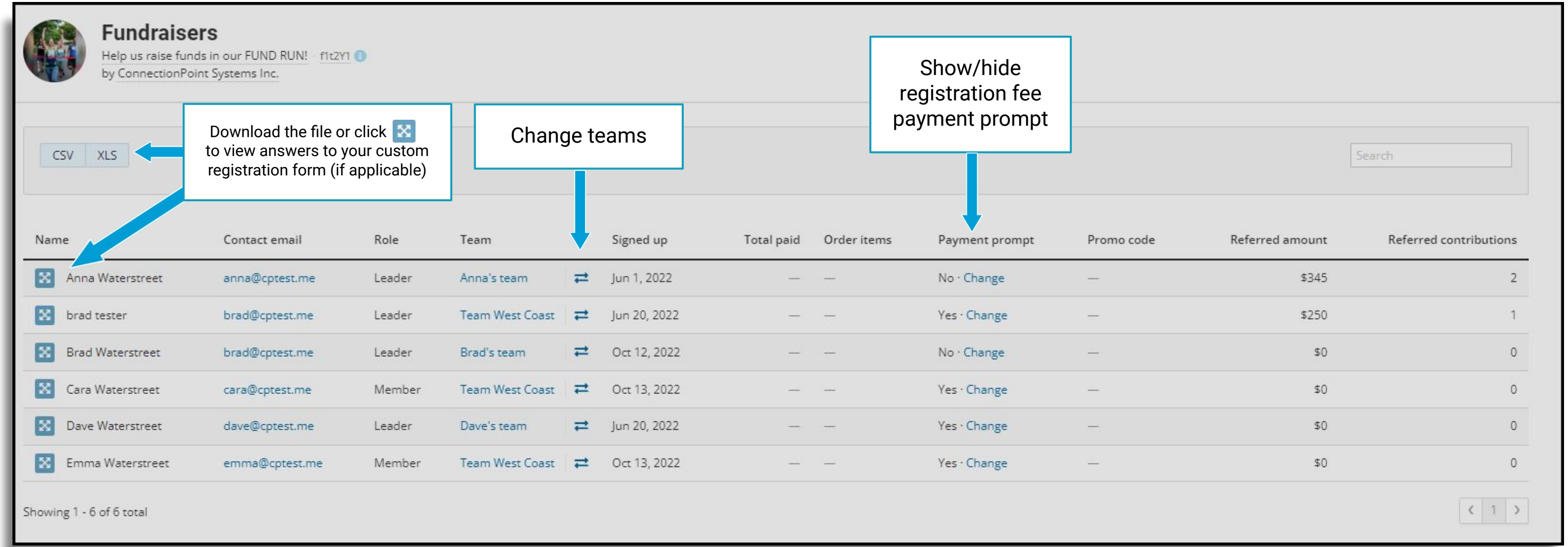
Managing Fundraisers

To view a list of every user registered to your campaign (whether as an individual or team), click on your Fundraiser menu.



Managing Fundraisers

This menu is your gateway to managing most settings and actions you need for each fundraiser.



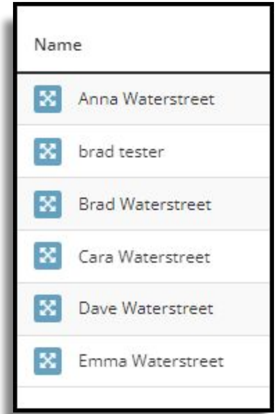
Name	Contact email	Role	Team	Signed up	Total paid	Order items	Payment prompt	Promo code	Referred amount	Referred contributions
Anna Waterstreet	anna@cptest.me	Leader	Anna's team	Jun 1, 2022	—	—	No · Change	—	$345	2
brad tester	brad@cptest.me	Leader	Team West Coast	Jun 20, 2022	—	—	Yes · Change	—	$250	1
Brad Waterstreet	brad@cptest.me	Leader	Brad's team	Oct 12, 2022	—	—	No · Change	—	$0	0
Cara Waterstreet	cara@cptest.me	Member	Team West Coast	Oct 13, 2022	—	—	Yes · Change	—	$0	0
Dave Waterstreet	dave@cptest.me	Leader	Dave's team	Jun 20, 2022	—	—	Yes · Change	—	$0	0
Emma Waterstreet	emma@cptest.me	Member	Team West Coast	Oct 13, 2022	—	—	Yes · Change	—	$0	0

Note: depending on how far your browser is zoomed in, you might not see all of the same columns. Click the expand icon ( ) or zoom out of your browser to see more options.

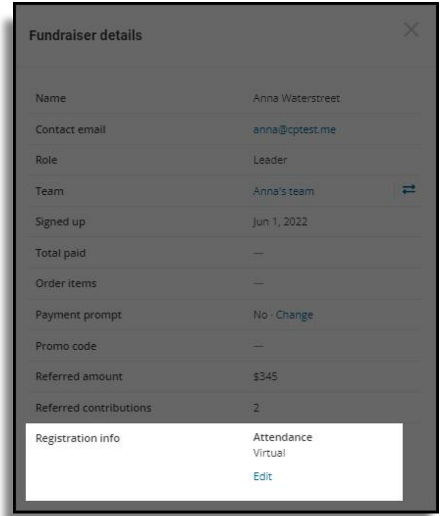
Managing Fundraisers

You can edit a fundraiser's registration information for them through this menu too.

1. Click the expand icon ( ) next to the fundraiser's name.



2. On the bottom of the expanded menu, you'll see the 'Edit' link for Registration info.



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Managing Fundraisers

Joining teams

Depending on the event and your organization's wishes, you can choose to promote your teams and joining them publicly, or keep everything private.

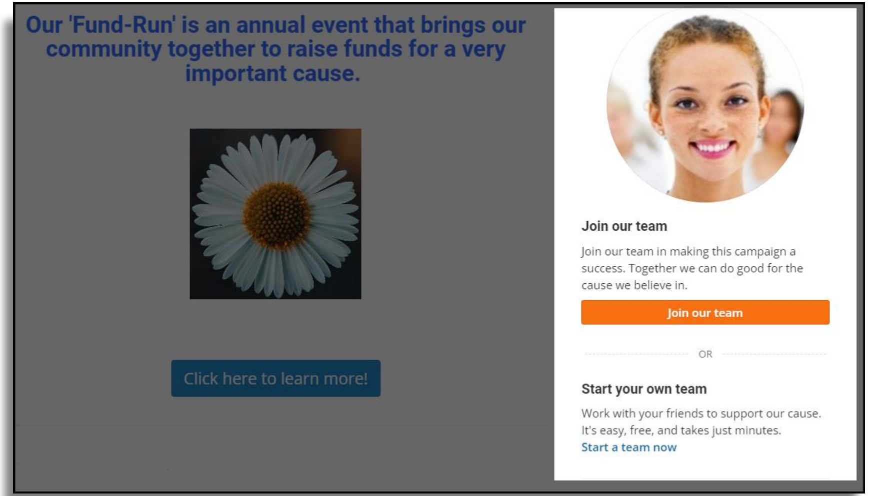
Here are your options:

A. **Public** shows a *Join the campaign team* button on the sub-campaigns and main campaign

B. **At registration** provides the join option during the registration flow *only*

C. **Private** takes all *Join* options off campaigns and registration, but still allows you *and* sub-campaign owners to send a private invitation link to anyone via email.

D. **Off** prevents anyone from registering onto a team without being directly added by the campaign managers.

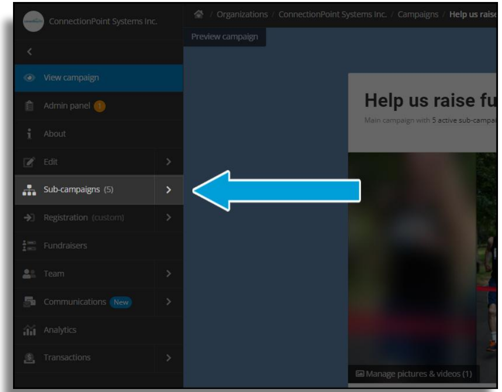


Managing Fundraisers

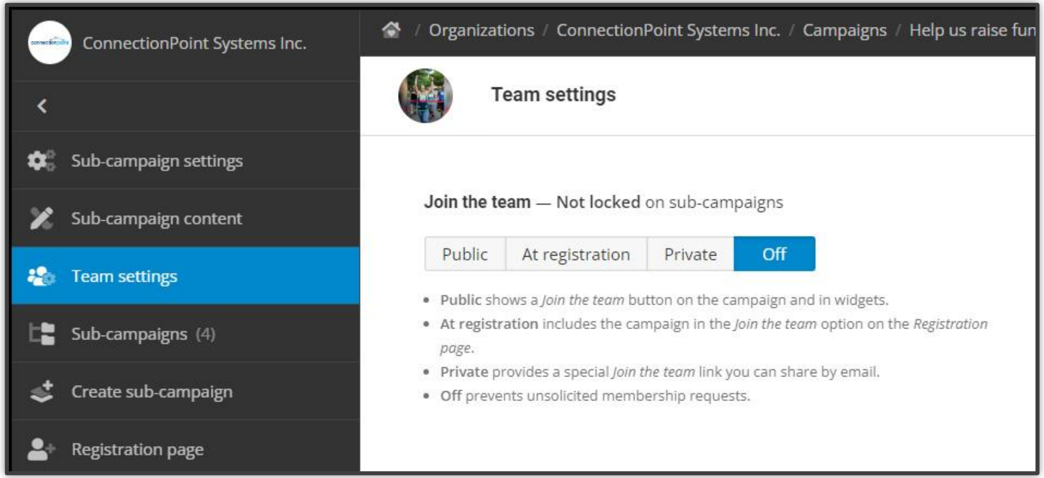
Joining teams

If you'd like to change where the option to join a team is:

1. Click 'Sub-campaigns' in your sidebar menu.



2. Under 'Team settings' you'll see the option '**Join the team**'. Make your choice then click 'Save' in the top right corner.

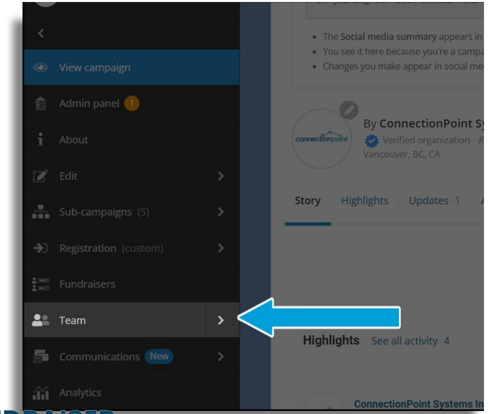


Managing Fundraisers

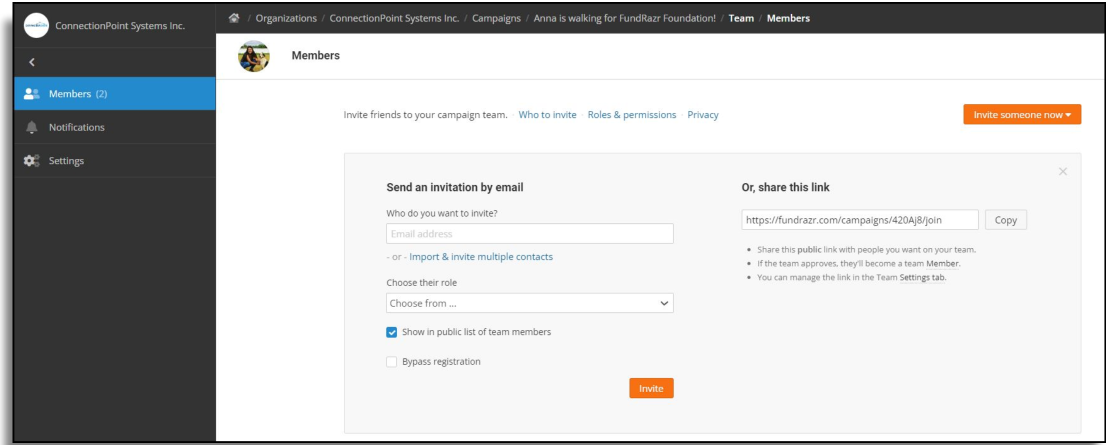
Inviting Team Members

If a fundraiser would like to invite someone to a team, they can either ask you as the owner to send the invitation, or you can forward them these instructions

1. Click 'Team' in the sidebar menu of **whichever campaign you want to invite the person to:**



2. Under 'Members', you'll see an '**Invite someone now**' button near the top right corner of the page. When you click it, you'll see options to either send them an email with the link, or copy the link to send another way.



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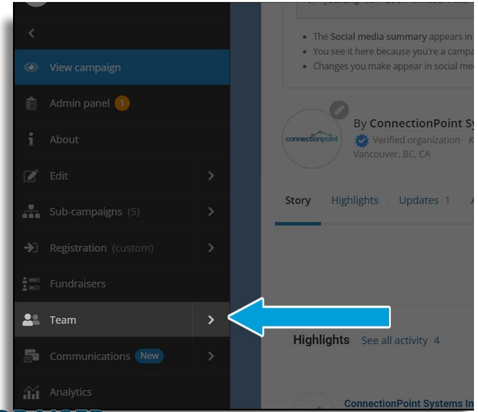
Managing Fundraisers

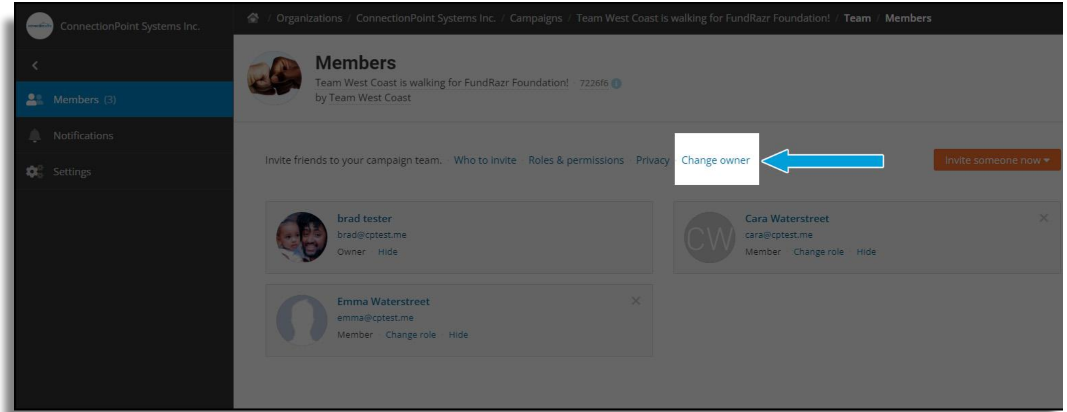
Changing team owners

The owner of a team sub-campaign is the only one on that team that can manage transactions, such as re-attributions (if allowed by the main campaign), and is also the only one who can *change* who the owner is.

1. Click ‘Team’ in the sidebar menu of **whichever sub-campaign is in question:**



2. Under ‘Members’, you’ll see ‘Change owner’ link near the top of the page. When clicked, you’ll see a drop-down menu with other current team members to change to.
****This can only be done once!** If you need to change owners again, please message our [FundRazr support team](#).**

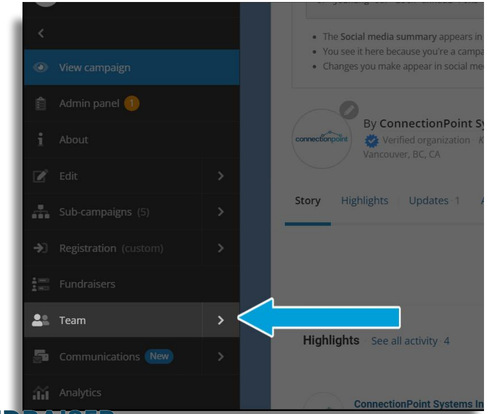


Managing Fundraisers

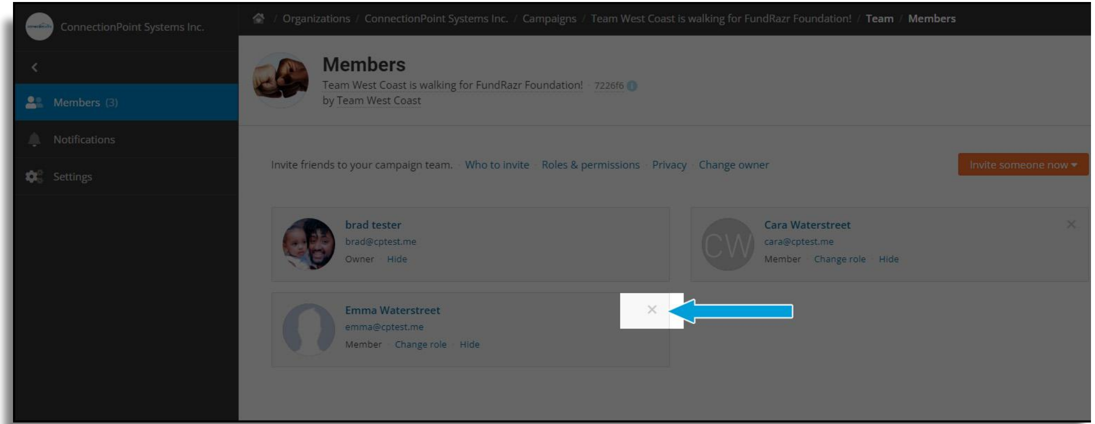
Deleting team members

Team members no longer participating in your event can be deleted. Their contributions will still be valid, they will just not be attributed to anyone. See page 77 for help re-attributing contributions (if you like; this is not mandatory)

1. Click ‘Team’ in the sidebar menu of **whichever sub-campaign the team member is part of:**



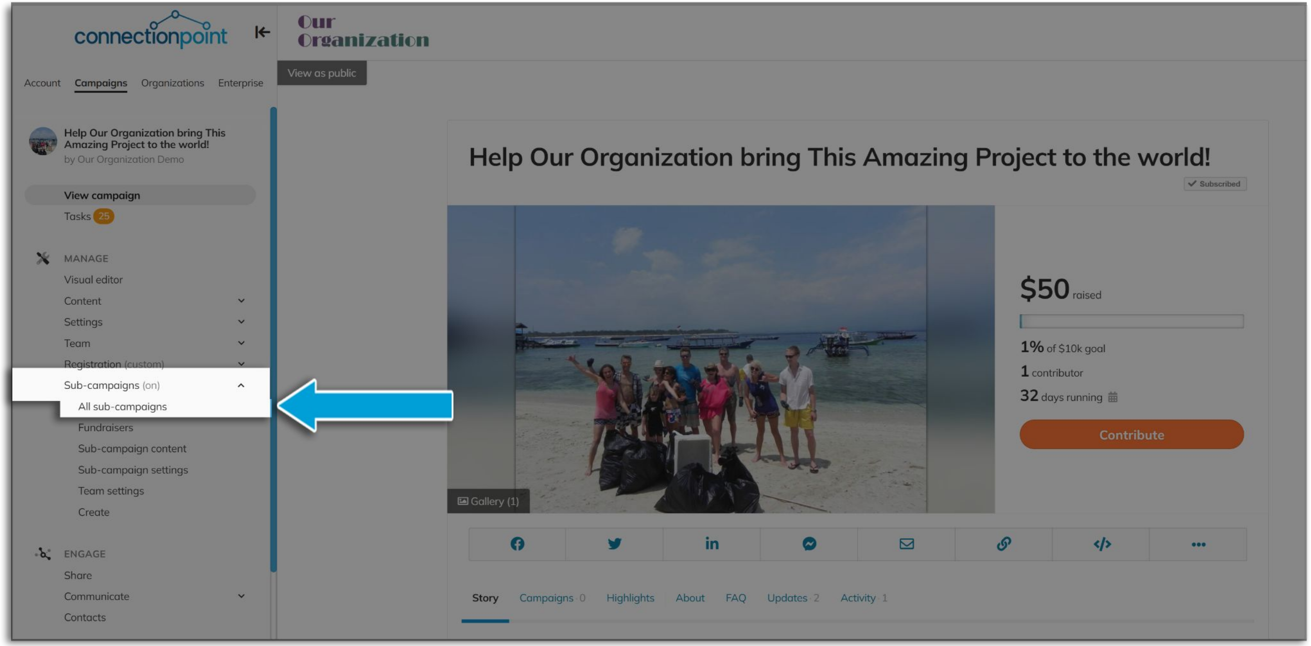
2. Under ‘Members’, you’ll see a light grey ‘**X**’ in the top right corner of every member’s box - except the Owner. See previous page for instructions on changing the owner if that person is the one to be deleted. Click the ‘**X**’ to delete.



Managing Sub-campaigns

Managing Sub-campaigns

To view a list of every sub-campaign you have registered (no matter whether they are individual or team campaigns), click ‘Sub-campaigns’ and then ‘All sub-campaigns’ in your main campaign’s navigation menu.



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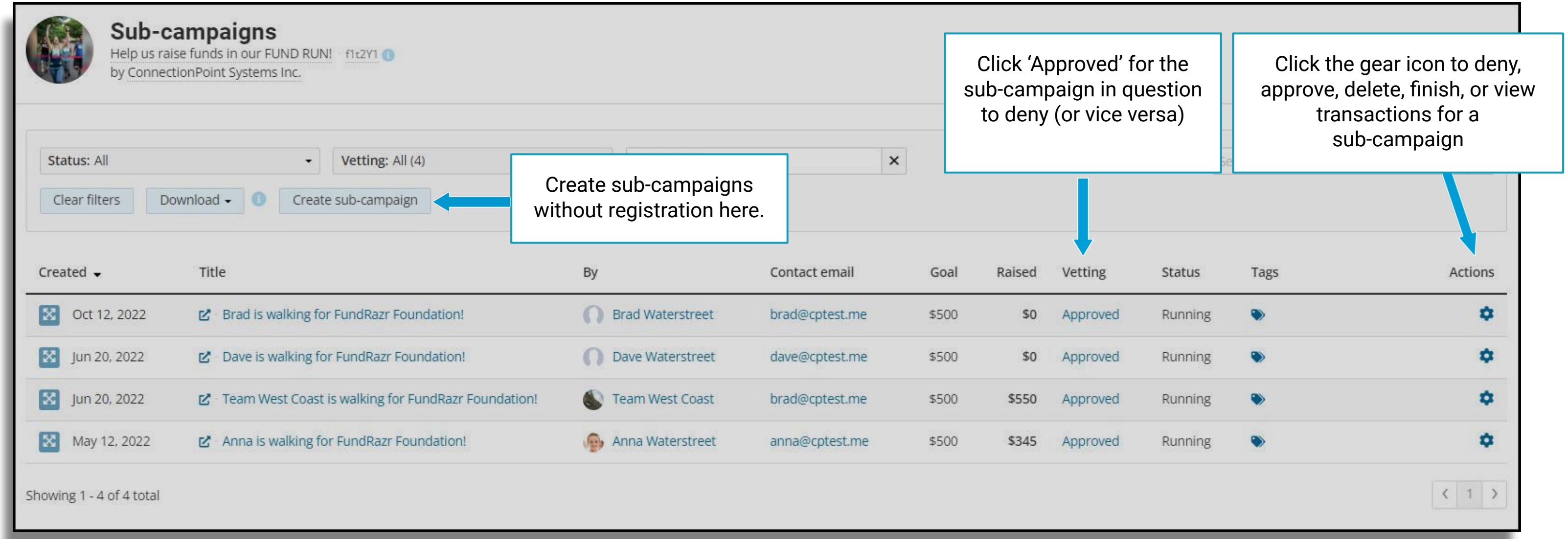
Managing Sub-campaigns

With this menu you can approve/deny sub-campaigns, pause them if needed, and create sub-campaigns.



Important: You cannot delete sub-campaigns with contributions attached, even if they are offline or $0. See page 77 for details on re-attributing contributions before deleting or contact us for assistance.

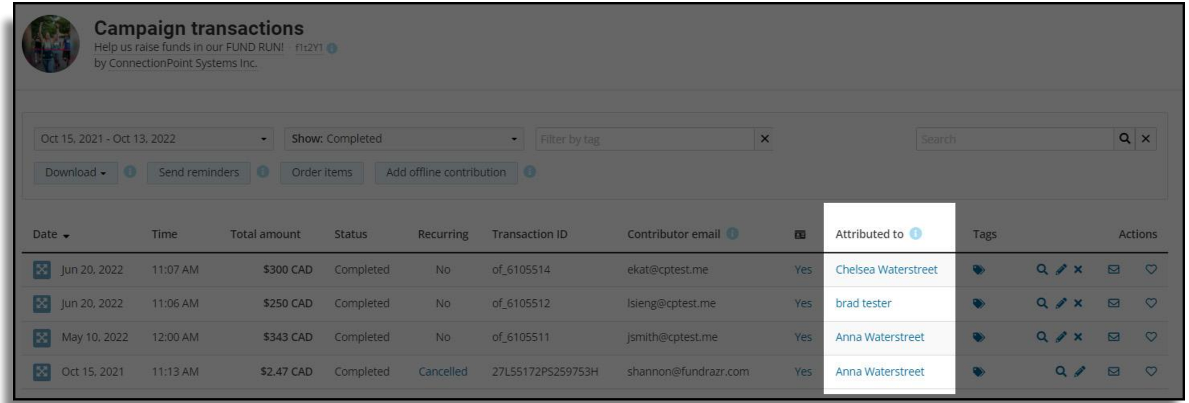
Changing Attributions

FUNDRAISER HUB by connectionpoint

Changing Attributions

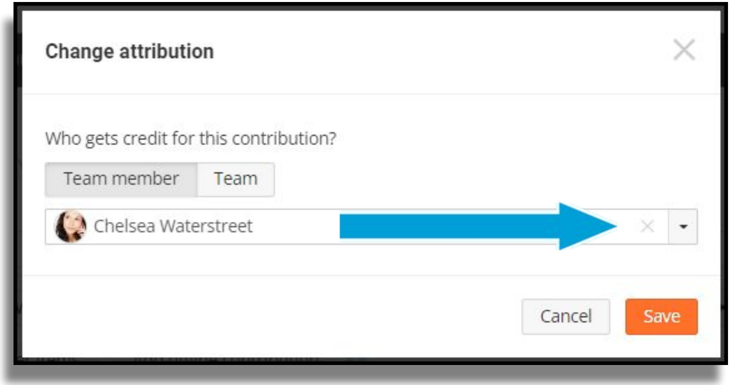
It happens! Contributions are attributed to the wrong team member, or someone drops out of your event.This is done through your main campaign's Transactions menu.

Under the '**Attributed to**' column, click the name in line with the contribution you want to change and search for the right fundraiser. **If you cannot see this column, zoom out of your browser or click the expand ( ) icon.**



Changing Attributions

If there is no one you want to attribute the contribution to, and you just want it applied to the team as a whole, click the 'X' in the search bar next to the fundraiser's name:



Set Fundraisers Up For Success

Set Fundraisers up for success

This is as easy as 1… 2… 3!

1. Download the Fundraiser Success Guide;
2. Send it to ALL of your fundraisers;
3. Sit back and enjoy the fun!

Troubleshooting & FAQ

Troubleshooting & FAQ

1. **I changed a setting but everything looks the same.**
   Some settings, such as changing the sub-campaign goal settings, do not work retroactively. Changes like these that have been made on the main campaign will only apply to new sub-campaigns created from that point onward. If you want to change already existing sub-campaign goals, you'd have to go in and switch them manually in the appropriate settings of the sub-campaign itself.

2. **I turned off joining teams publicly, so why is there still a banner asking for Registration on sub-campaigns?**
   This is actually a different setting. Rather than asking for a viewer to join the campaign's team, it's asking if they'd like to register their *own* team or individual page. To remove this, click 'Registration' in the sidebar panel of your ***MAIN*** campaign, then 'Registration settings.' Under '**Promote registration,**' choose '**No**' and that banner will disappear.

3. **How do I get rid of the big 'Registration' button on the main campaign?**
   You may have noticed a setting in the Registration menu that asks if you want to '**Show Registration button on main campaign**,' but you cannot click '**No**.' This is because the setting is locked for peer-to-peer campaigns. If you want to completely close registration (maybe your venue is full!) then you will need to change your layout. Click 'Edit' in the ***MAIN*** campaign, then 'Layout,' then change your layout to '**Microproject with leaderboard**.' This will allow you to go back into that 'Show Registration button' setting and switch it to 'No.' Don't worry, this is a safe change to make!

4. **My custom form options are not showing up in the registration flow.**
   Did you make sure to click the setting that says '**Use custom registration form?**' to '**Yes**'? **See page 51 of this guide.**

Troubleshooting & FAQ

5. **My fundraiser didn't pay their fee somehow. Can I make them?**
The fee payment occurs after the sub-campaign is technically created. If the registrant exits the window without paying the fee (perhaps they didn't have a form of payment ready), then their sub-campaign will still be created. The fundraiser can view their campaign in their user menu.

   The reasoning behind this is to prevent roadblocks to registration and get people raising money for your cause ASAP. Best practices for managing fundraisers include clear communication on what will happen if fees are not paid (can they still participate in the event? Do they receive their swag or other rewards? Are they eligible for prizes?) and checking in on which participants have paid and which have not, and communicating directly with those participants who have not to ensure they're aware it's required. Every time a fundraiser views their sub-campaign, they will receive a pop-up reminder from FundRazr that they need to pay their fees. However, your direct communication with them will help immensely.

6. **I tested my fee in the registration flow, but it didn't prompt me for it.**

   Is your campaign launched? Payments cannot occur on unlaunched campaigns.

   Also, if you have tested your registration before and currently have a sub-campaign, the system will remember your user name has registered before and may block the fee to avoid multiple charges of fees. Try deleting the sub-campaign you created for yourself and try again. If you are still running into issues, let us know at support@connectionpoint.com.

7. **How can I discount or remove Registration fees for VIP fundraisers?**

   Create a promo code! The last tab in your edit menu for Registration fees is for promo code creation. Make sure that code is '**Applied**'!

Troubleshooting & FAQ

8. **What if someone wants to go from a team to an individual page?**
This unfortunately isn't as simple as the other way around (individual to team page). This is because there isn't an individual campaign for this user to transfer to; it has to be created. You have two options for this:
    a) Have them re-register as an individual (give them a promo code for 100% off the Registration fee if they've already paid it); or
    b) Create a sub-campaign for them. **See page 75** to view where this option is.

9. **Why is the wrong name at the top of a sub-campaign/main campaign?**
You may notice a banner at the top of your main campaign or a sub-campaign with a user photo and/or name that doesn't appear to be linked with the campaign in question. This is because you clicked on a link that was shared by that FundRazr user. The banner is connected to a reference code in the URL, which begins with **?ref=** and is followed by random letters and numbers. *The banner will not show for everyone, just people who click on a link to the campaign shared by that particular user.* If you do NOT want an endorsement banner to appear when you share a link, remove the reference code from the URL. NOTE: your browser remembers! Simply deleting the reference code and then viewing the page again will not remove the banner. Your browser cookies track sites you've viewed before, and you'll continue to see the banner until you delete your cookies or clear your browser cache. See this article for more information.

Have a question not answered by this guide?

Check out the ConnectionPoint Help Centre or email us at support@connectionpoint.com