

Peer-to-peer campaigns

A complete guide to set-up and management



connectionpoint.com/fundraiserhub

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Please consider the environment before printing

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

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 <i>under</i> 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 <i>single</i> 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

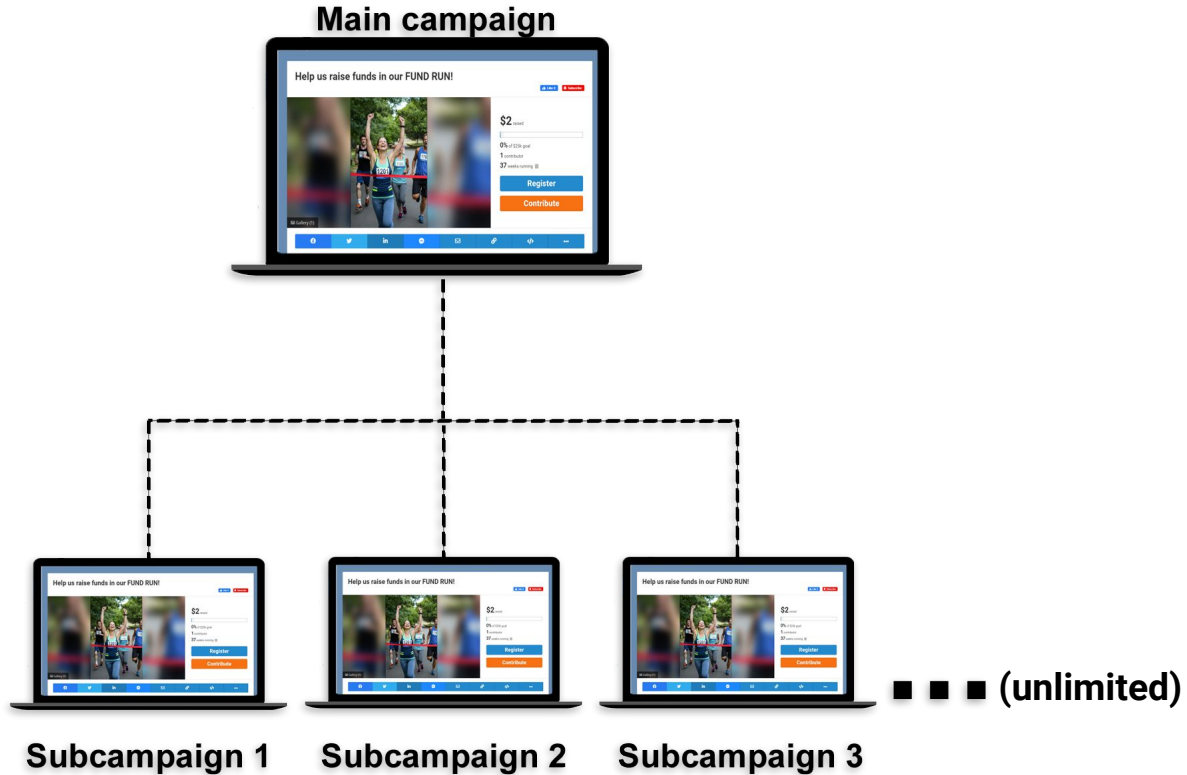
Peer-to-peer campaigns (as well as DIY and Microproject campaigns) have two tiers:

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).

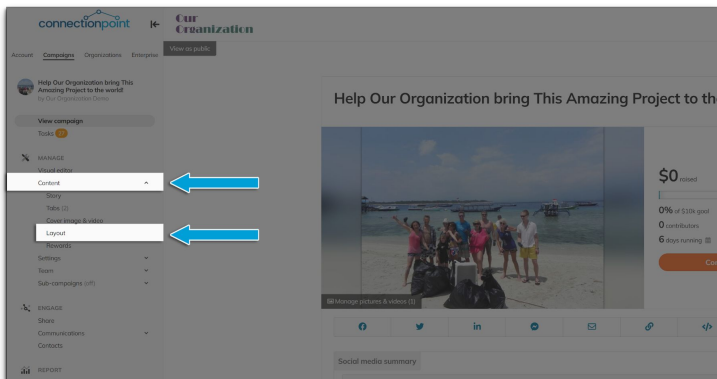
Structure of a P2P Campaign



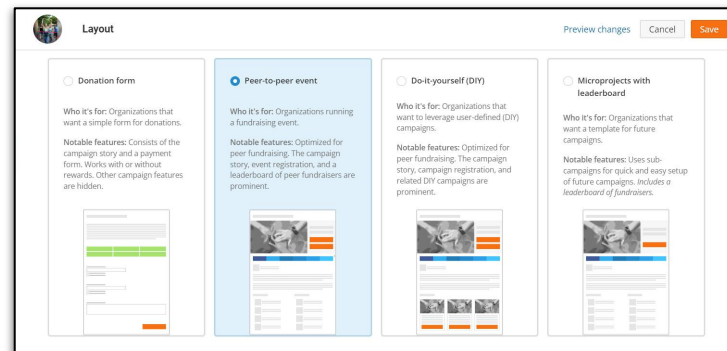
Choosing the Peer-to-peer Layout

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.'



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

Individual vs Team Sub-campaigns

What's the difference?

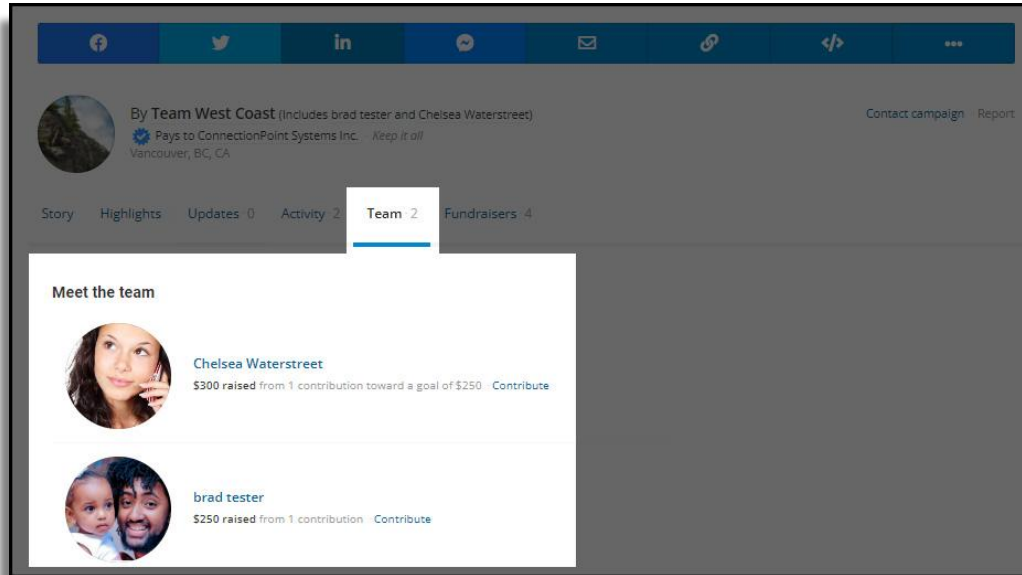
A common question with P2P campaigns is “What is the difference between an individual sub-campaign and a team sub-campaign?”

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

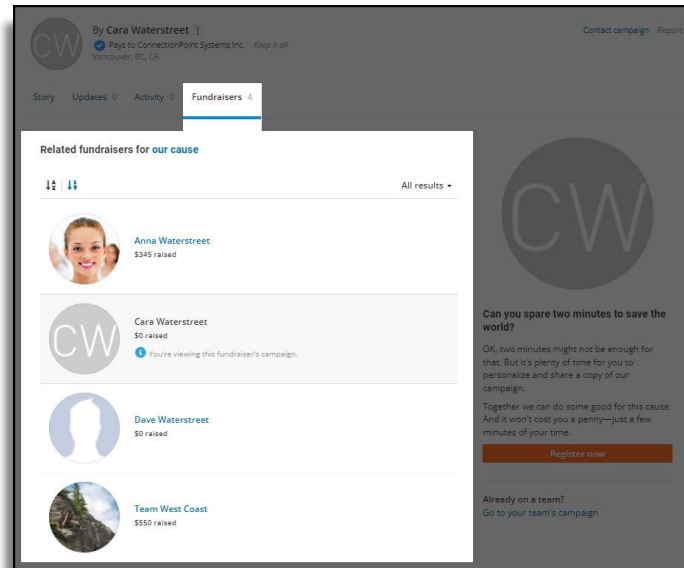
What's the difference?



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.

Individual vs Team Sub-campaigns

What's the difference?



An individual sub-campaign will 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.

The screenshot shows a campaign page titled "Help us raise funds in our FUND RUN!". On the left is a photo gallery with one image of a runner crossing a finish line. On the right, the campaign statistics are displayed: "\$2,895 raised", "29% of \$10k goal", "8 contributors", and "94 weeks running". A blue arrow points to the "29% of \$10k goal" text. Below the stats are "Register" and "Contribute" buttons. At the bottom is a social sharing bar with icons for Facebook, Twitter, LinkedIn, Messenger, Email, Print, and a menu icon.

Help us raise funds in our FUND RUN!

Subscribe

\$2,895 raised

29% of \$10k goal

8 contributors

94 weeks running

Register

Contribute

Gallery (1)

Facebook Twitter LinkedIn Messenger Email Print ...

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.

The screenshot displays the 'Funding & deadline' settings page. The sidebar on the left includes options like 'View campaign', 'Tasks', 'MANAGE', 'Visual editor', 'Content', 'Settings', 'Payment processing', 'Funding & deadline' (highlighted with a blue arrow), 'Data collection', 'Receipts', 'Marketing', 'Privacy', 'Emails', 'About', 'Team', 'Registration', and 'Sub-campaigns'. The main content area shows 'Your currency' set to 'Canadian Dollar' and a 'Goal' of '\$ 10,000.00'. Below the goal, there are instructions and a 'Deadline' section with options for 'No deadline' (selected) and 'Run until'.

Need more help?
[See this article in our Help Centre.](#)

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.'

The screenshot displays the 'Sub-campaign settings' page in the Fundraiser Hub. The left sidebar contains a navigation menu with 'Sub-campaign settings' highlighted and a blue arrow pointing to it. The main content area features a toggle for 'Show aggregate goal on the main campaign (currently \$2,100)?' with 'No' selected. Below this, there is a section for 'Show aggregate funds on the main campaign?' with 'No' selected. A warning icon and text are visible above the 'Show aggregate goal' section.

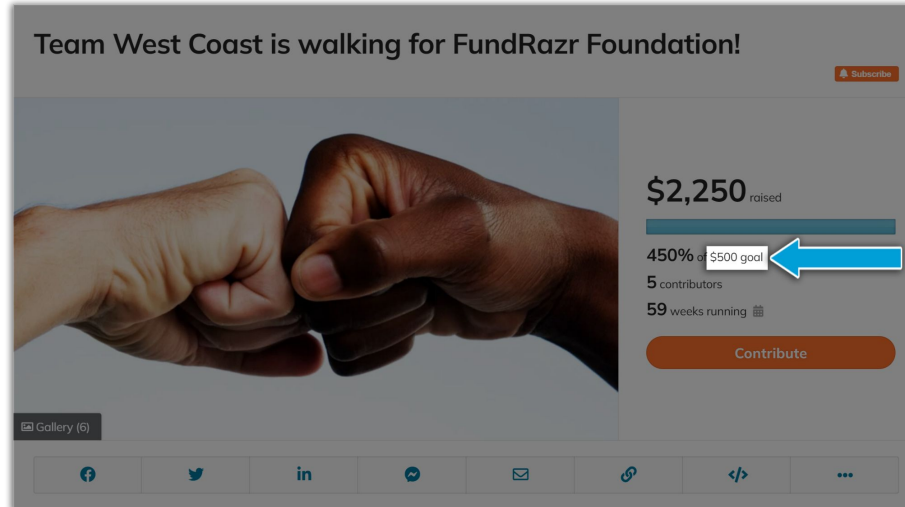
Need more help?
[See this article in our Help Centre.](#)

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!

The screenshot displays the 'Sub-campaign settings' page in the Fundraiser Hub. The left sidebar navigation menu includes 'Sub-campaign settings', which is highlighted with a blue arrow. The main content area shows the 'Sub-campaign goal' section with 'Static' selected, a goal amount of \$500.00, and a 'Lock the static goal' checkbox. Below it, the 'Sub-campaign stats' section has 'Inherit setting from main' selected and a 'Lock the setting on sub-campaigns' checkbox.

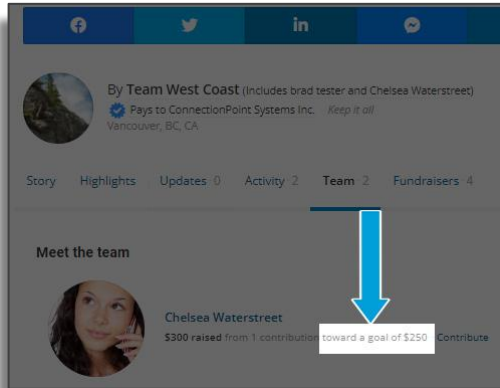
Setting Goals

Team member goals

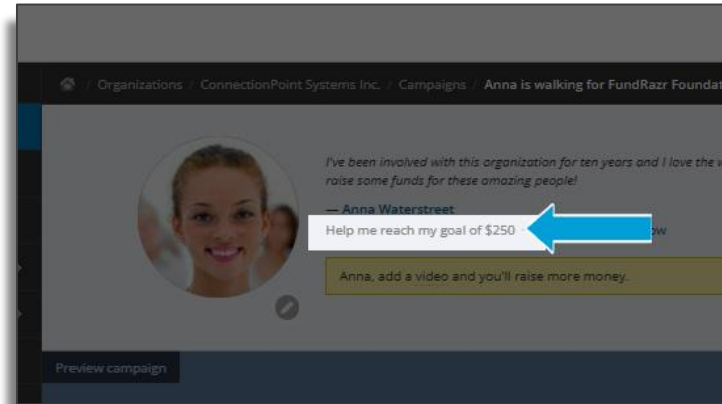
What should *each fundraiser* set as their personal goal?

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



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.

Account Campaigns Organizations Enterprise

Help us raise funds in our FUND RUN!
By ConnectionPoint Systems Inc.

View campaign

Tasks 2

MANAGE

Visual editor

Content

Settings

Team

Registration (custom)

Sub-campaigns (on)

All sub-campaigns (5)

Sub-campaign content

Sub-campaign settings

Team settings

Create

Join the team — Not locked on sub-campaigns

Public At registration Private **Off**

- Public shows a *Join the team* button on the campaign and in widgets.
- At registration includes the campaign in the *Join the team* option on the *Registration page*.
- Private provides a special *Join the team* link you can share by email.
- Off prevents unsolicited membership requests.

Team member goal — Not locked on sub-campaigns

\$ 500.00

- Suggest a personal goal for all team members, team creators, and individual fundraisers (optional).
- For best results, enter an amount less than the *Sub-campaign goal*.

Make it a required minimum 1

Preparing Sub-campaigns

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

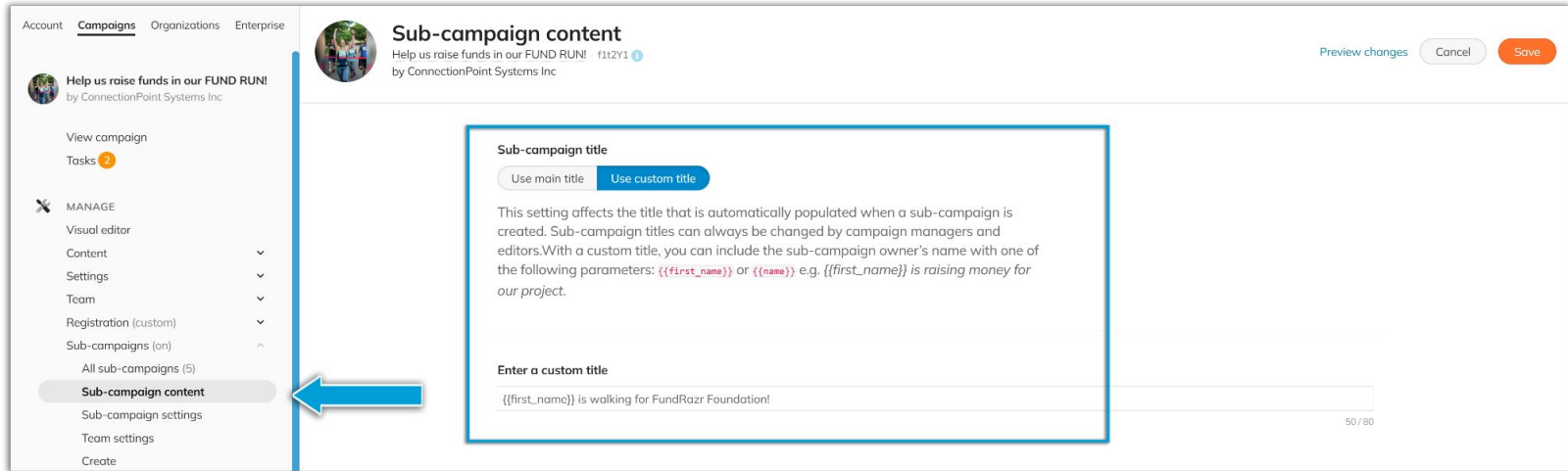
Choose `{{first_name}}` to only pull an individual's first name and choose `{{name}}` to pull their first and last names. Either option will always pull team names as "Team (whatever they choose their team name to be)".

(Screenshot on next page)

Preparing Sub-campaigns

Title templating

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



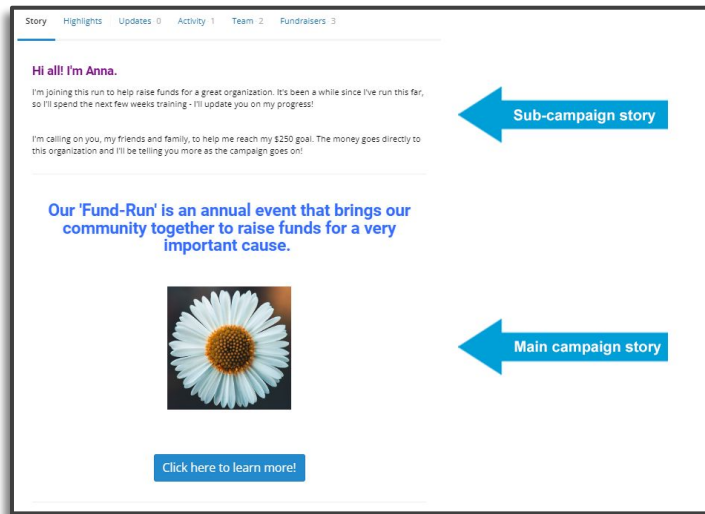
The screenshot shows the 'Sub-campaign content' settings page for a campaign titled 'Help us raise funds in our FUND RUN!' by ConnectionPoint Systems Inc. The left sidebar contains a navigation menu with 'Sub-campaign content' highlighted and a blue arrow pointing to it. The main content area is titled 'Sub-campaign content' and includes a 'Sub-campaign title' section with two radio buttons: 'Use main title' (selected) and 'Use custom title'. Below this is explanatory text: 'This setting affects the title that is automatically populated when a sub-campaign is created. Sub-campaign titles can always be changed by campaign managers and editors. With a custom title, you can include the sub-campaign owner's name with one of the following parameters: {{first_name}} or {{name}}. e.g. {{first_name}} is raising money for our project.' At the bottom, there is a text input field labeled 'Enter a custom title' containing the placeholder text '{{first_name}} is walking for FundRazr Foundation!'. The page also features 'Preview changes', 'Cancel', and 'Save' buttons in the top right corner.

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).



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.](#)

The screenshot displays the FundRazr campaign management interface. On the left, a sidebar menu is visible with the following items: Account, Campaigns (selected), Organizations, Enterprise, Help us raise funds in our FUND RUN! by ConnectionPoint Systems Inc., View campaign, Tasks (2), MANAGE, Visual editor, Content, Settings, Team, Registration (custom), Sub-campaigns (on), All sub-campaigns (5), Sub-campaign content (highlighted with a blue arrow), Sub-campaign settings, Team settings, Create, ENGAGE, Share, Communicate, Contacts, and REPORT. The main content area shows a campaign titled 'Help us raise funds in our FUND RUN!'. A modal window is open, titled 'Include an additional story in sub-campaigns automatically?'. It contains three radio buttons: 'Yes, same as main', 'Yes, custom story' (selected), and 'No'. Below the radio buttons is a list of bullet points explaining the options. Underneath is a section titled 'Provide a custom story' with a rich text editor. The editor contains the text 'Thank you for supporting our cause!' and a placeholder image of a hand holding a heart. A note below the editor states: 'Note: Extra space may appear in columns for editing. It won't be saved, nor will this message.' The editor also contains a paragraph of placeholder text: 'Debitis et nihil dolores sunt rem placeat aut. Proident omnis aut officis ea veniam fugit maiores eum. Est et minima explicabo. Quos recusandae commodi et tenetur. Sit quos consequatur doloribus eum et omnis voluptate eos. Natus praesentium est dolorem aperiam. Voluptatum nobis earum doloremque qui at. Molestias quos queraat laudantium ipsam iste rem.'

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.






Related fundraisers for our cause

All results ▾

	Bo Haraldson \$3,745 raised
	Brody Jones \$3,640 raised
	Bromwyn Kirk \$3,800 raised
	Chad Girardin \$4,490 raised
	Dan Haines \$12,160 raised

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

All results ▾

Position		Total raised
1	 Jamie MEATSTICK Cruickshank of JOEY RESTAURANTS	\$12,390
2	 Dan Haines	\$12,160
3	 RENAENAE FOR JOEY RESTAURANT GROUP	\$8,960
4	 Fritz Lapastora	\$7,495
5	 Kayla Nishino	\$5,043

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.

The screenshot displays the 'Sub-campaign settings' page for the campaign 'Help us raise funds in our FUND RUN!' by ConnectionPoint Systems Inc. The page is divided into two main sections:

- Enable sub-campaigns?** This section features a toggle switch currently set to 'Yes'. Below it, a list of bullet points explains the implications of enabling sub-campaigns: they allow for creating main and sub-campaign levels, each main campaign can have an unlimited number of sub-campaigns, contributions to sub-campaigns update the main campaign's goal meter and activity feed, and they are required for peer-to-peer fundraising, micro-projects, and DIY fundraising. A lock icon indicates this setting is locked by campaign activity.
- Show related sub-campaigns** This section is highlighted with a blue box and contains a row of radio buttons for selecting how other sub-campaigns from the same main campaign appear on every campaign. The options are: Off, List, Leaderboard, List & leaderboard, **Leaderboard & list** (which is selected), and Grid. Below the buttons, the text reads: 'How other sub-campaigns that belong to the same main campaign will appear on every campaign. Compare'.

In the left sidebar, the 'Sub-campaign settings' menu item is highlighted with a blue arrow pointing to it.

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:

The screenshot shows the 'Sub-campaign stats' settings page. At the top, there are 'Show' and 'Hide' buttons, with 'inherit setting from main' selected. Below this is a checkbox for 'Lock the setting on sub-campaigns'. A list of bullet points explains the settings: if shown, stats appear prominently; depending on settings, stats can include current total amount, goal, progress meter, contributors, and deadline; the main campaign stats setting is in the Privacy tab; and hiding stats can reduce the amount of money raised. There is a warning icon next to the last bullet point. The next section is 'Show aggregate goal on the main campaign (currently \$2,100)?' with 'Yes' and 'No' buttons, and a note that the default is 'No'. The following section is 'Show aggregate funds on the main campaign?' with 'Yes' and 'No' buttons, and a note that the total of all funds raised is always shown. The next section is 'Show sub-campaign updates on the main campaign?' with 'Yes' and 'No' buttons, and two bullet points explaining that 'No' means updates will not be displayed and 'Yes' means they will. The final section is 'Allow different rewards on sub-campaigns?' with 'Yes' and 'No' buttons, and two bullet points explaining that 'No' means sub-campaigns inherit rewards and 'Yes' means they do not inherit rewards.

Sub-campaign stats

Show Hide **inherit setting from main**

Lock the setting on sub-campaigns

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

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

Show aggregate goal on the main campaign (currently \$2,100)?

Yes No

Show the total of sub-campaign goals on the main campaign. Default is No. How it works

Show aggregate funds on the main campaign?

Yes No

⚠ The total of all funds raised is always shown on the main campaign.

Show sub-campaign updates on the main campaign?

Yes No

- No - Sub-campaign story updates WILL NOT be displayed on the main campaign (default).
- Yes - Sub-campaign story updates WILL be displayed on the main campaign.

Allow different rewards on sub-campaigns?

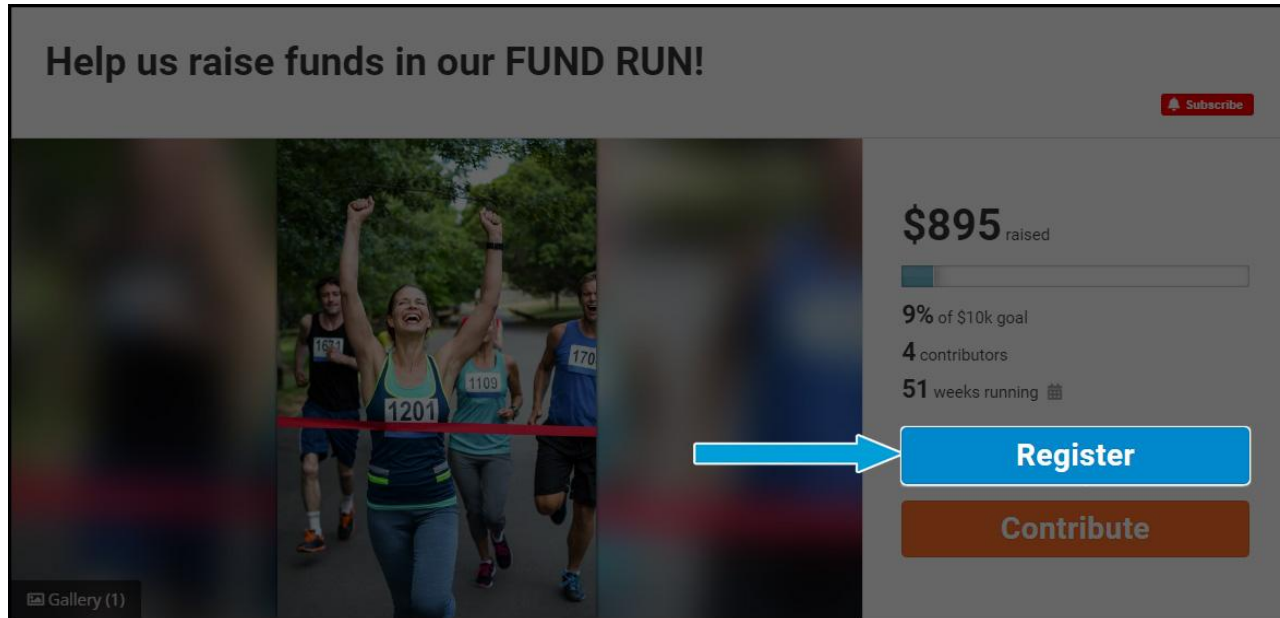
Yes No

- No - Sub-campaigns inherit rewards from the main campaign (default).
- Yes - Sub-campaigns DO NOT inherit rewards from the main campaign. Sub-campaigns can offer their own rewards.

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:



Help us raise funds in our FUND RUN!

[Subscribe](#)

\$895 raised

9% of \$10k goal

4 contributors

51 weeks running

[Register](#)

[Contribute](#)

Gallery (1)

The screenshot shows a fundraising campaign interface. At the top, it says "Help us raise funds in our FUND RUN!". Below this is a large image of a woman running across a finish line with her arms raised. To the right of the image are campaign statistics: "\$895 raised", "9% of \$10k goal", "4 contributors", and "51 weeks running". At the bottom right, there are two buttons: a blue "Register" button and a brown "Contribute" button. A blue arrow points to the "Register" button.

The Registration Form

The basic form

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

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.

Register as an individual
Sign up and personalize your campaign.

or


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

or

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

[Back to campaign](#) Continue

Step 1: Choose individual or team campaign





Register to fundraise
New here? Sign up with any option below.


@ Enter your email address


Continue

OR

 Continue with Facebook

 Continue with LinkedIn

 Continue with Google



One account for FundRazr, CrowdFundr, and more.

[Support](#) · [Terms of service](#) · [Privacy policy](#)

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

Your personal message

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

Why does our cause matter to you?

0 / 1000

[Record video](#) [Upload video](#)


Your personal goal

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

\$.00

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

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

 **Welcome aboard!**

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

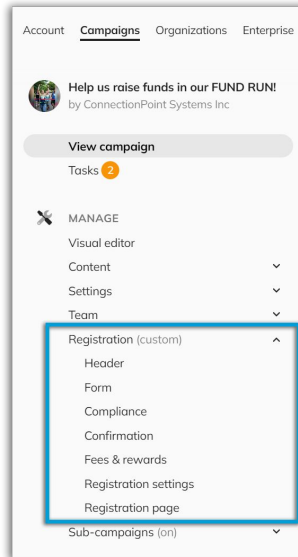
[View your page](#)

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

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)

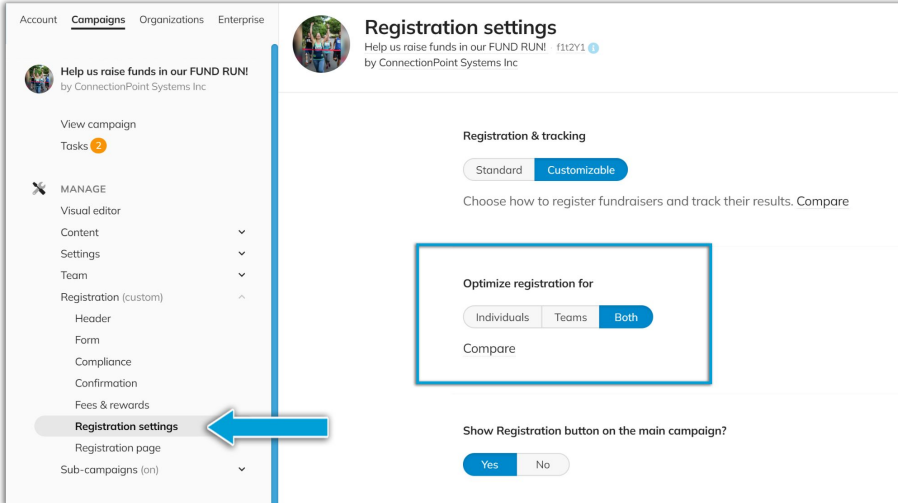
(Continued on next page)

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.'



The screenshot shows the 'Registration settings' page for a campaign titled 'Help us raise funds in our FUND RUN!' by ConnectionPoint Systems Inc. The page is divided into a left sidebar and a main content area. The sidebar contains a navigation menu with options like 'View campaign', 'Tasks', 'MANAGE', 'Visual editor', 'Content', 'Settings', 'Team', 'Registration (custom)', 'Header', 'Form', 'Compliance', 'Confirmation', 'Fees & rewards', 'Registration settings', 'Registration page', and 'Sub-campaigns (on)'. A blue arrow points to the 'Registration settings' option in the sidebar. The main content area has a header with the campaign name and a sub-header 'Registration settings'. Below this, there are two sections: 'Registration & tracking' with 'Standard' and 'Customizable' buttons, and 'Optimize registration for' with 'Individuals', 'Teams', and 'Both' buttons. The 'Both' button is selected. There is also a 'Compare' link and a 'Show Registration button on the main campaign?' toggle with 'Yes' and 'No' options.

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 screenshot displays the 'MANAGE' section of the Fundraiser Hub settings. The left sidebar contains a menu with the following items: Visual editor, Content, Settings, Team, Registration (custom), Header, Form, Compliance, Confirmation, Fees & rewards, **Registration settings** (highlighted with a blue arrow), Registration page, and Sub-campaigns (on). The main content area shows the following settings:

- Select **Yes** to review and approve sub-campaigns before they raise money.
• Default is **No**.

Automatically launch sub-campaigns?
 Yes No

- Select **No** to require fundraisers to launch their campaign manually.
• Default is **Yes**.

Allow sub-campaigns to bypass registration for invited team members
 Yes No

- Select **Yes** to allow sub-campaign managers to exempt invited team members from completing the registration form, paying fees, etc.
• Default is **No**.

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.

Account Campaigns Organizations Enterprise

to create a new sub-campaign. Default is Yes.

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

View campaign

Tasks 2

MANAGE

Visual editor

Content

Settings

Team

Registration (custom)

Header

Form

Compliance

Confirmation

Fees & rewards

Registration settings

Registration page

Sub-campaigns (on)

ENGAGE

Share

Communicate

Prompt for beneficiary?

Yes No

- Prompt fundraisers who register to create a sub-campaign with an option to provide the name of the person who will benefit from the funds raised.
- Does not apply to fundraisers who join an existing team
- Default is No.

Require your approval to raise money?

Yes No

- Select Yes to review and approve sub-campaigns before they raise money.
- Default is No.

Automatically launch sub-campaigns?

Yes No

- Select No to require fundraisers to launch their campaign manually.
- Default is Yes.

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..

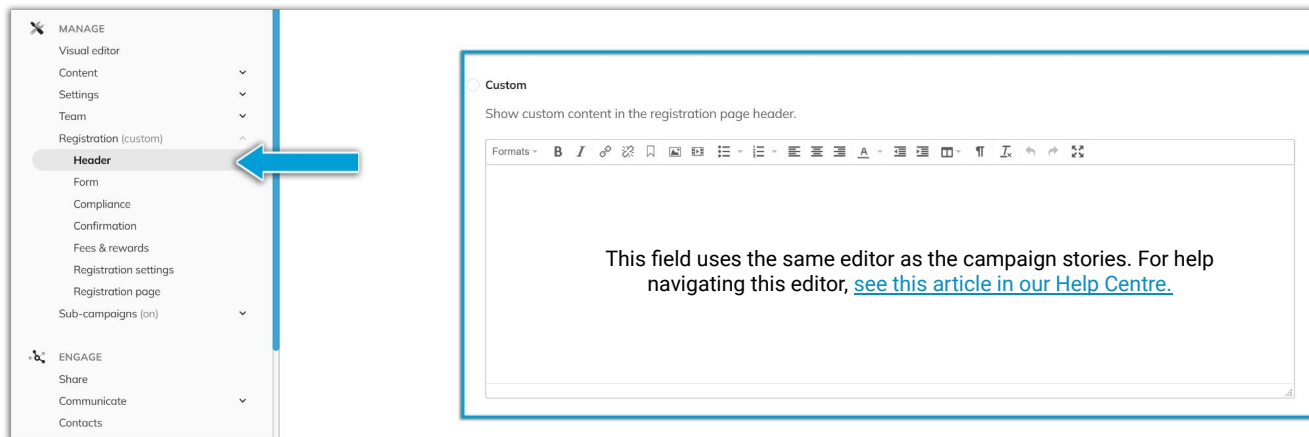
With your help, we can make great things happen for the cause we believe in.

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 screenshot displays the Fundraiser Hub management interface. On the left, a sidebar under the 'MANAGE' section lists various settings, with 'Registration (custom)' expanded to show 'Header' selected and highlighted by a blue arrow. The main workspace shows the 'Custom' configuration for the registration page header, featuring a rich text editor with a toolbar and a text area containing the following text: "This field uses the same editor as the campaign stories. For help navigating this editor, [see this article in our Help Centre.](#)"

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 screenshot displays the 'Form' configuration page for a campaign titled 'Help us raise funds in our FUND RUN!' by ConnectionPoint Systems Inc. The left sidebar menu includes options like 'View campaign', 'Tasks', 'MANAGE' (with sub-items: Visual editor, Content, Settings, Team, Registration (custom), Header, Form, Compliance, Confirmation, Fees & rewards, Registration settings, Registration page, Sub-campaigns (on)), and 'ENGAGE' (with sub-items: Share, Communicate, Contacts). A blue arrow points to the 'Form' option in the sidebar.

The main content area is titled 'Form' and includes the following settings:

- Collect endorsement?** (Yes) Yes No
 - Prompt fundraisers to provide an endorsement consisting of a personal message, a video, and a personal fundraising goal (all optional).
 - When provided, the endorsement appears prominently on the campaign.
 - Default is Yes.
- Prompt for customization?** (No) Yes No
 - Prompt fundraisers who create a campaign to provide their own campaign title, introduction, and story (all optional).
 - Does not apply to fundraisers who join an existing team.
 - Default is No.
- Use custom registration form?** (No) Yes No
 - Use the custom form you create below to collect additional information during registration.

The Registration Form

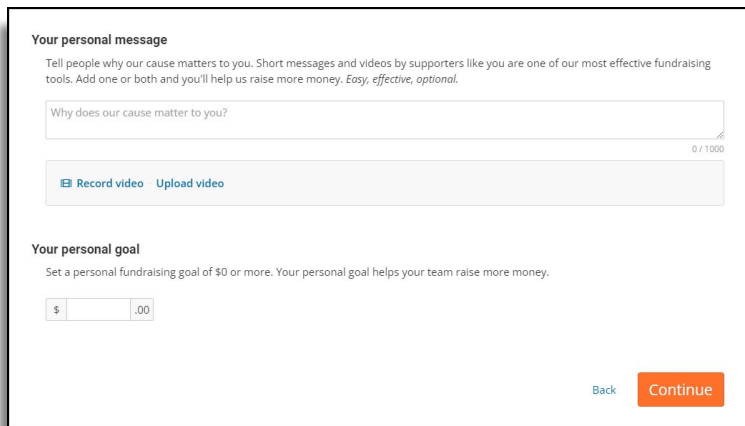
Registration form builder



Collect endorsement?

Yes No

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.



Your personal message

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

Why does our cause matter to you?

0 / 1000

Record video Upload video

Your personal goal

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

\$.00

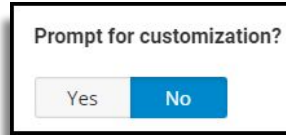
Back Continue

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



Prompt for customization?

Yes No

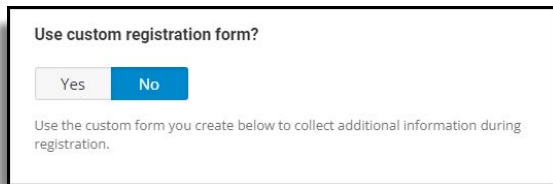
This setting is asking if you want your fundraisers to go through the **campaign creation flow** to customize their sub-campaign with title, story, pictures, etc. They will have the ability to edit all of this whether you choose 'Yes' or 'No'; however, some organizations find that their fundraisers don't 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

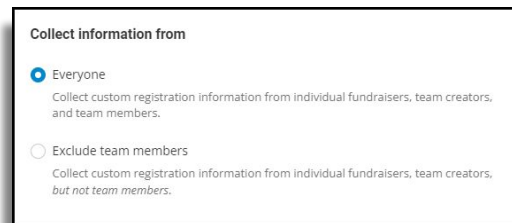


Use custom registration form?

Yes No

Use the custom form you create below to collect additional information during registration.

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.'



Collect information from

Everyone
Collect custom registration information from individual fundraisers, team creators, and team members.

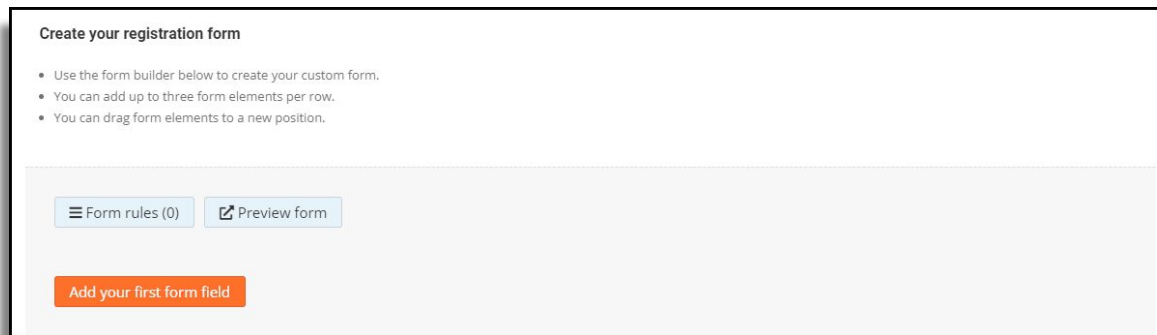
Exclude team members
Collect custom registration information from individual fundraisers, team creators, but not team members.

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

Add form field [X]

Field type: Input

ID: NewField2
An ID to identify the field in form rules and reports. Must be unique. Can contain letters, numbers, [] and [-].

Appearance

Label: New Field Label 2
The text label that appears above the form field.

Placeholder: []
The text that appears in the empty input e.g. Enter your name.

Help text: []
Supports links in Markdown syntax, e.g. [Link label] (https://example.com).

Validation

Make the field required

Valid value: Text

Min. length: []

Max. length: []

Cancel Apply

- **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.

The Registration Form

Registration form builder

Field types

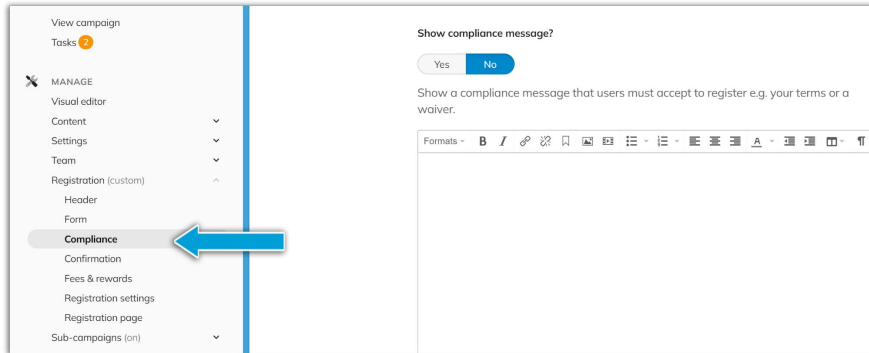
- **Input** - answer can be different types of characters, but all must be physically typed in by the registrant
- **Text area** - answer can only be textual characters.
- **Select** - registrant answers by choosing **one** option from a dropdown list
- **Checkboxes** - multiple answers can be selected (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.



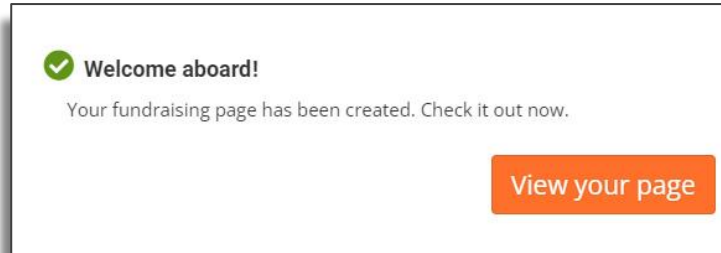
This section uses a rich text editor, like the campaign story. [Click here for help navigating the editor.](#)

The Registration Form

Confirmation message

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

Without customization, your final message will look like this:

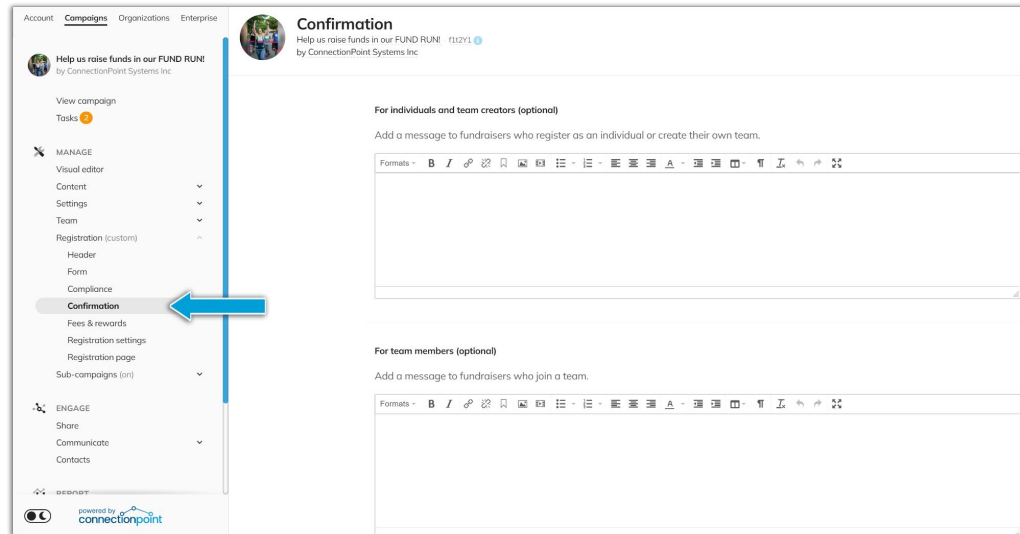


While this is perfectly *fine*, you're aiming for better than fine. We recommend you insert your logo again, put in a more personal thank you, and let your fundraisers know what's next: pay a fee, customizing their pages, etc.

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

The Registration Form

Confirmation message



The screenshot shows the 'Confirmation' message editor interface. On the left is a navigation menu with categories: Account, Campaigns, Organizations, and Enterprise. Under 'Campaigns', there's a campaign titled 'Help us raise funds in our FUND RUN!' by ConnectionPoint Systems Inc. Below this are options for 'View campaign', 'Tasks', and 'MANAGE' (Visual editor, Content, Settings, Team, Registration (custom), Header, Form, Compliance). The 'Confirmation' option is highlighted with a blue arrow. Other options include 'Fees & rewards', 'Registration settings', 'Registration page', 'Sub-campaigns (on)', 'ENGAGE' (Share, Communicate, Contacts), and 'powered by connectionpoint'. The main content area is titled 'Confirmation' and contains two sections: 'For individuals and team creators (optional)' and 'For team members (optional)'. Each section has a text input field with a rich text editor toolbar above it. The toolbar includes options for Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Text Color, Background Color, Undo, and Redo.

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.

The screenshot shows the 'Fees & rewards' page for a campaign titled 'Help us raise funds in our FUND RUN!' by ConnectionPoint Systems Inc. The page is divided into a left sidebar and a main content area. The sidebar contains navigation options like 'View campaign', 'Tasks', and 'MANAGE' with sub-options for 'Visual editor', 'Content', 'Settings', 'Team', and 'Registration (custom)'. The 'Fees & rewards' section is highlighted in the sidebar. The main content area features a heading 'Fees & rewards' with a sub-heading 'Registration rewards (optional)'. A prominent orange button labeled 'Add a fee or reward' is located in the top right corner of the main content area. Below this, there is a list of instructions for adding registration rewards, a search bar, and a 'Nothing to show' message. At the bottom, there is a checkbox for 'Exclude from campaign stats' and a link to 'Add another reward'.

Account **Campaigns** Organizations Enterprise

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

View campaign
Tasks 2

MANAGE

Visual editor

Content

Settings

Team

Registration (custom)

Header

Form

Compliance

Confirmation

Fees & rewards

Registration settings

Registration page

Sub-campaigns (on)

ENGAGE
Share

Fees & rewards

Help us raise funds in our FUND RUN! f1t2Y1
by ConnectionPoint Systems Inc

Registration rewards (optional)

[Add a fee or reward](#)

- Charge a registration fee or offer rewards available only during registration.
- If you add one or more fees, registrants will be required to select at least one to complete their registration.
- Any rewards you add will be optional.
- You can drag and drop any fee or reward to a new position in the list.

Search

Nothing to show

[Add another reward](#)

Exclude from campaign stats

Exclude registration payments from the campaign statistics e.g. the total amount raised.

The Registration Form

Fees & rewards

Fee or reward?!

Add a registration reward

Basics | Quantity & delivery | Shipping & fulfillment | Variants | Promo codes

Name of reward:

Picture:

• Rewards with a picture get more attention.
• Use a jpg, gif, webp or png file. 720 x 720 pixels recommended.

Cancel | Add 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

Add a registration reward

- Use a jpg, gif, webp or png file. 720 x 720 pixels recommended.

Reward type: Fee

Which to choose?

Offer to: Everyone registering (selected), Everyone registering, Individuals and team creators, Team members

Price: Fixed (selected), Flexible

\$

- Contributors pay the amount you set.
- Remember your expenses.

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:

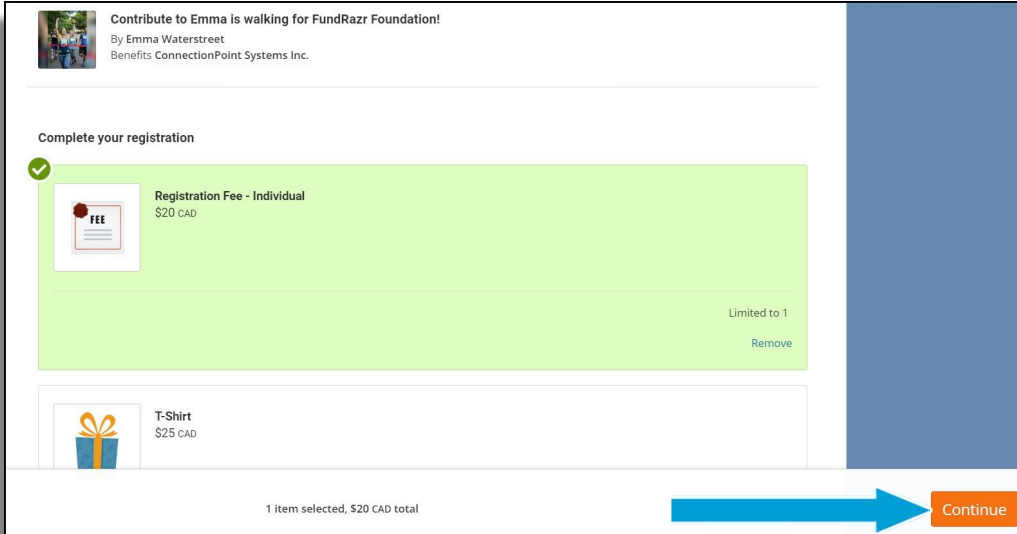


The Registration Form

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:**



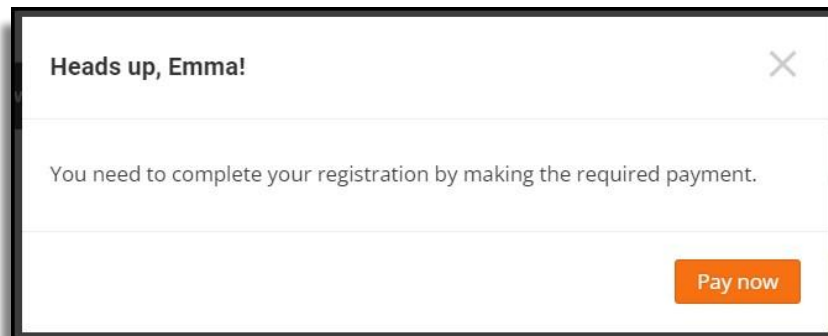
The screenshot shows a registration form for a walkathon. At the top, it says "Contribute to Emma is walking for FundRazr Foundation!" by Emma Waterstreet, Benefits ConnectionPoint Systems Inc. Below this is a section titled "Complete your registration" with a green checkmark icon. There are two items listed: "Registration Fee - Individual" for \$20 CAD, which is highlighted in green and has a "Remove" button and "Limited to 1" text; and "T-Shirt" for \$25 CAD. At the bottom, it says "1 item selected, \$20 CAD total" and there is a blue arrow pointing to an orange "Continue" button.

The Registration Form

Fees & rewards

How it works

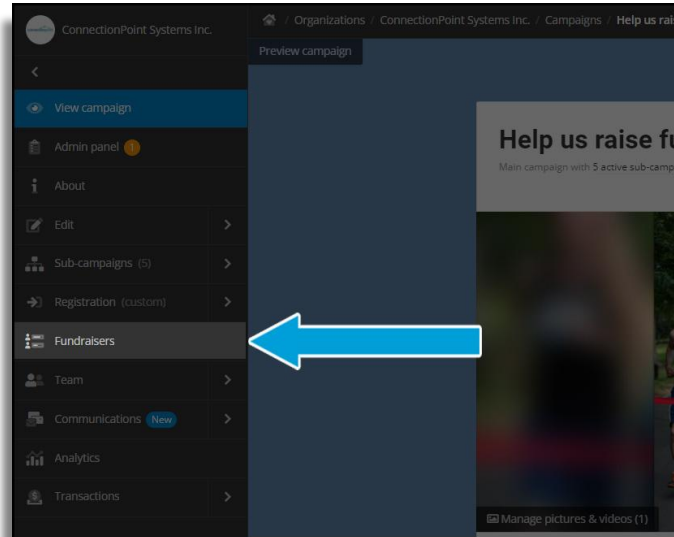
If a fundraiser accidentally cancels during registration or loses web service in the middle of paying their fees, their campaign is already created. However, they will be reminded every time they log in. You can turn off this prompt if you like ([see page 66](#)).



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.

The screenshot shows the 'Fundraisers' management page. At the top, there's a header with a profile picture, the title 'Fundraisers', and a sub-header 'Help us raise funds in our FUND RUN! ft2Y1 by ConnectionPoint Systems Inc.'. Below the header are 'CSV' and 'XLS' buttons, a search bar, and a table of fundraiser data. Three callout boxes point to specific features: 'Download the file or click to view answers to your custom registration form (if applicable)' points to the expand icon in the first row; 'Change teams' points to the team name in the first row; 'Show/hide registration fee payment prompt' points to the 'Payment prompt' column header.

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.

Name	
⊗	Anna Waterstreet
⊗	brad tester
⊗	Brad Waterstreet
⊗	Cara Waterstreet
⊗	Dave Waterstreet
⊗	Emma Waterstreet

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


Fundraiser details	
Name	Anna Waterstreet
Contact email	anna@cptest.me
Role	Leader
Team	Anna's team
Signed up	Jun 1, 2022
Total paid	—
Order items	—
Payment prompt	No · Change
Promo code	—
Referred amount	\$345
Referred contributions	2
Registration info	Attendance Virtual Edit

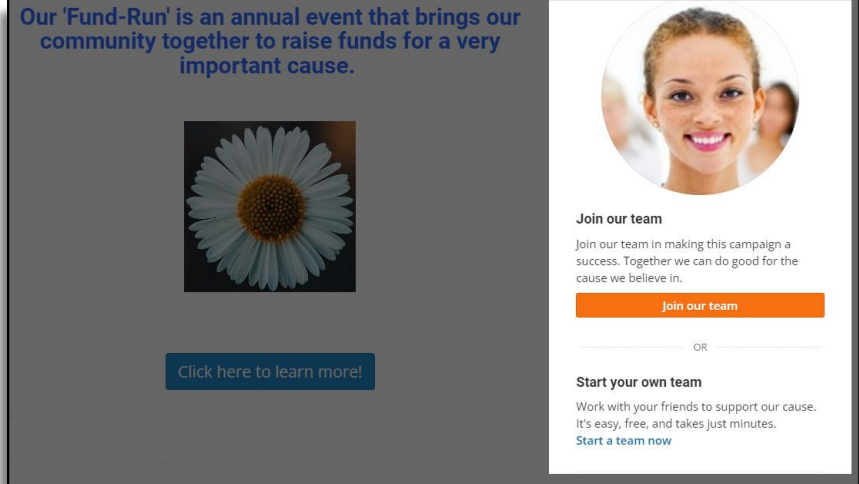
Managing Fundraisers

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.



Our 'Fund-Run' is an annual event that brings our community together to raise funds for a very important cause.



[Click here to learn more!](#)

Join our team

Join our team in making this campaign a success. Together we can do good for the cause we believe in.

[Join our team](#)

OR

Start your own team

Work with your friends to support our cause. It's easy, free, and takes just minutes.

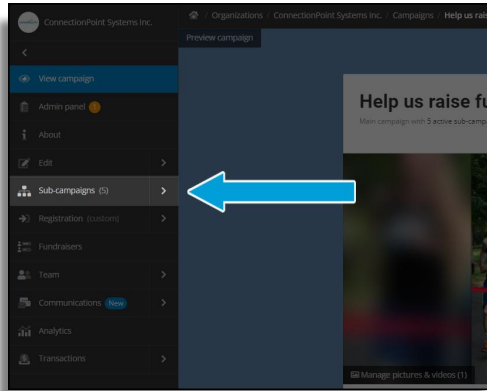
[Start a team now](#)

Managing Fundraisers

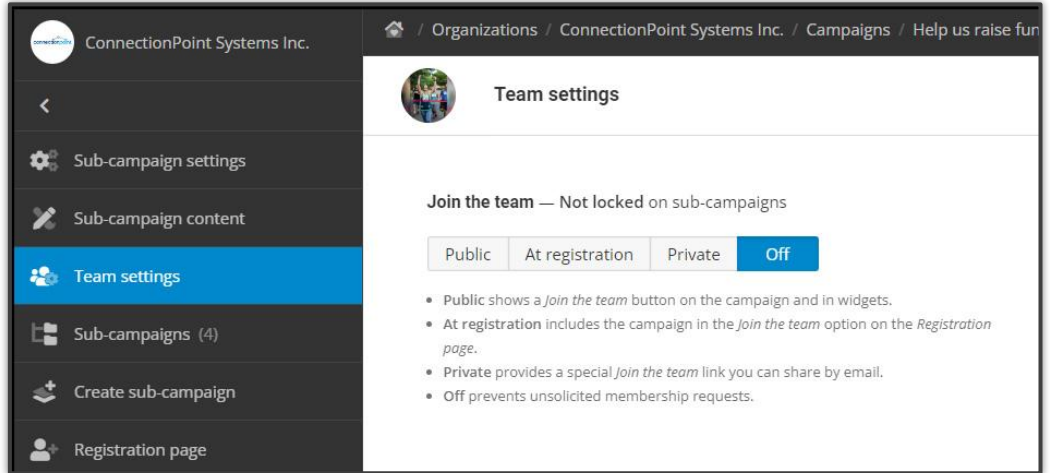
Joining teams

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.

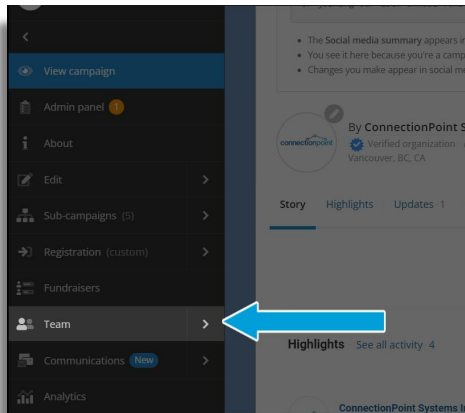


Managing Fundraisers

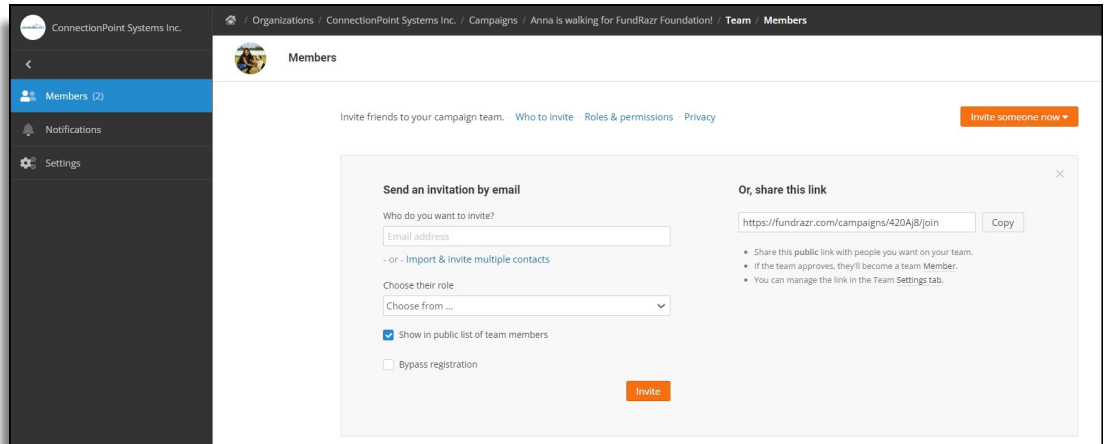
Inviting Team Members

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.

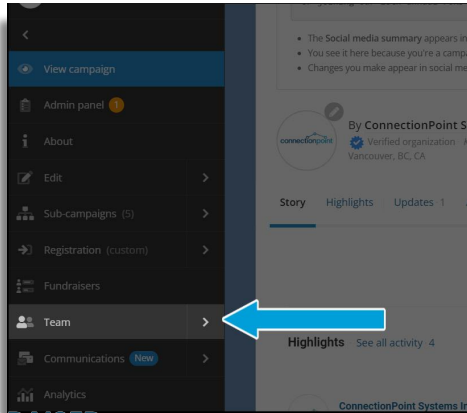


Managing Fundraisers

Changing team owners

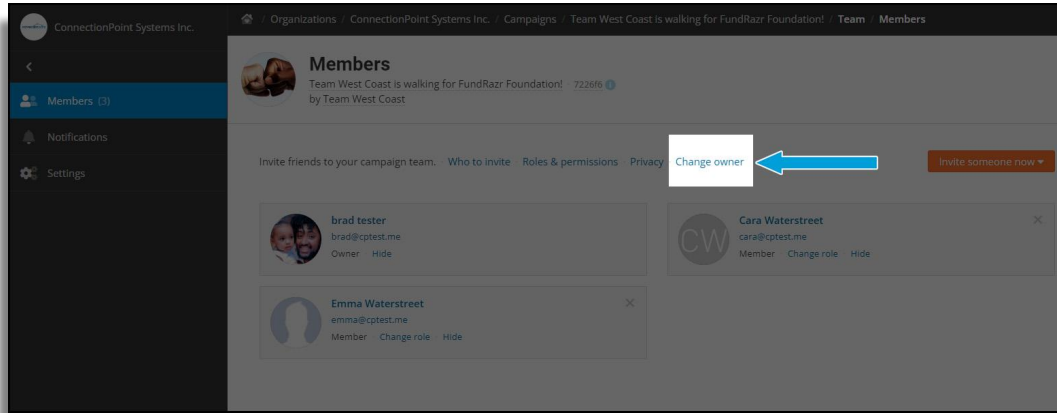
The owner of a team sub-campaign is the only one on that team that can manage transactions, such as re-attributions (if allowed by the main campaign), and is also the only one who can *change* who the owner is.

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](#).

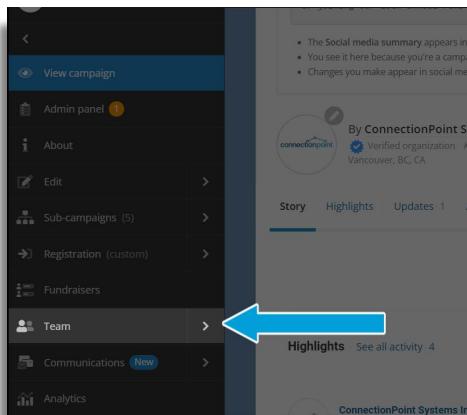


Managing Fundraisers

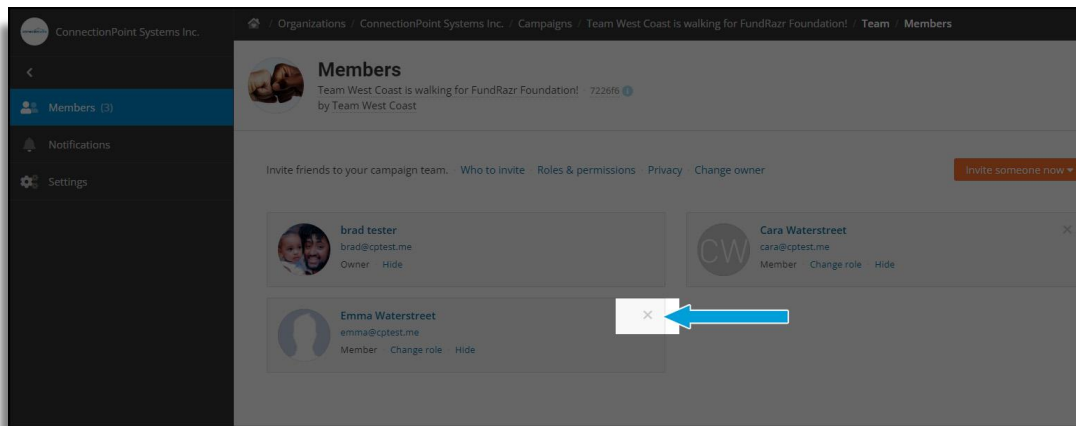
Deleting team members

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**:



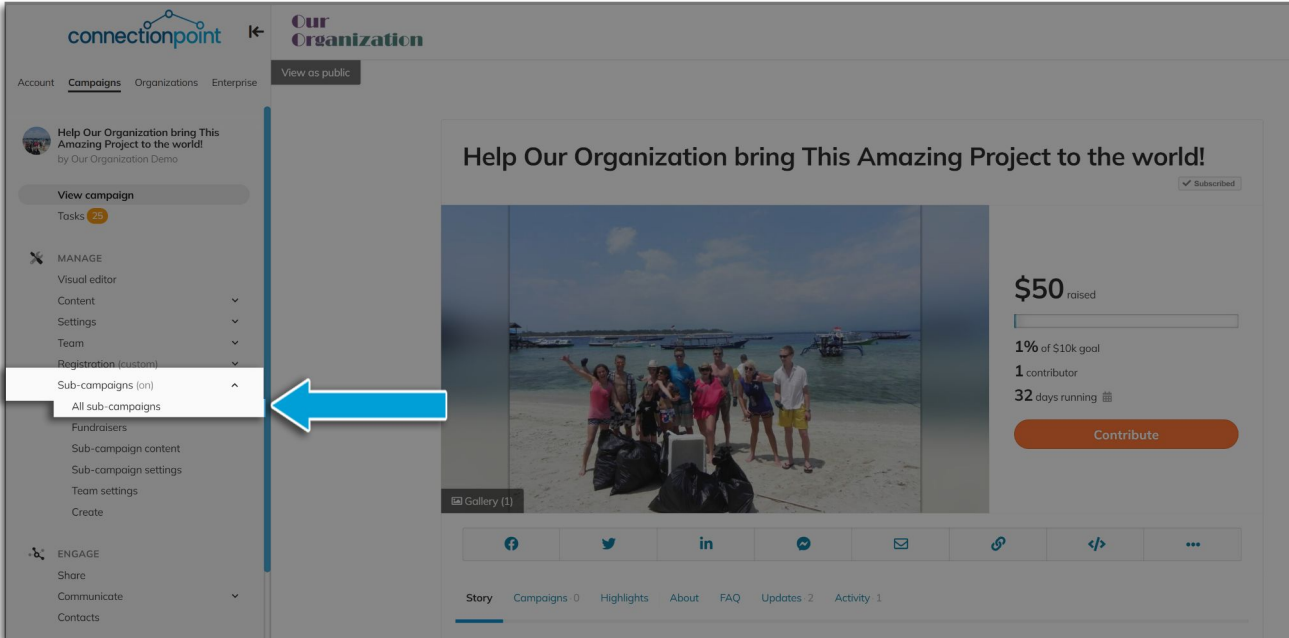
2. Under 'Members', you'll see a light grey 'X' in the top right corner of every member's box - except the Owner. See previous page for instructions on changing the owner if that person is the one to be deleted. Click the 'X' to delete.



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.



The screenshot displays the Connectionpoint interface for a campaign titled "Help Our Organization bring This Amazing Project to the world!". The left-hand navigation menu is open, showing various management options. A blue arrow points to the "Sub-campaigns (on)" option, which has a sub-menu containing "All sub-campaigns". Other menu items include "View campaign", "Tasks", "MANAGE" (Visual editor, Content, Settings, Team, Registration), "ENGAGE" (Share, Communicate, Contacts), and "Fundraisers". The main content area shows a campaign goal of \$10k, with \$50 raised, 1 contributor, and 32 days running. A "Contribute" button is visible.

Managing Sub-campaigns

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

The screenshot shows the 'Sub-campaigns' management interface. At the top, there is a header with a profile picture, the title 'Sub-campaigns', and a subtitle 'Help us raise funds in our FUND RUN! f1t2Y1 by ConnectionPoint Systems Inc.'. Below the header, there are filter options for 'Status: All' and 'Vetting: All (4)', along with buttons for 'Clear filters', 'Download', and 'Create sub-campaign'. A table lists four sub-campaigns with columns for 'Created', 'Title', 'By', 'Contact email', 'Goal', 'Raised', 'Vetting', 'Status', 'Tags', and 'Actions'. The 'Vetting' column shows 'Approved' for all entries. The 'Actions' column contains gear icons. Three callout boxes provide instructions: one points to the 'Create sub-campaign' button, another points to the 'Vetting' column, and a third points to the gear icon in the 'Actions' column.

Sub-campaigns
Help us raise funds in our FUND RUN! f1t2Y1
by ConnectionPoint Systems Inc.

Status: All Vetting: All (4)

Clear filters Download Create sub-campaign

Create sub-campaigns without registration here.

Click 'Approved' for the sub-campaign in question to deny (or vice versa)

Click the gear icon to deny, approve, delete, finish, or view transactions for a sub-campaign

Created	Title	By	Contact email	Goal	Raised	Vetting	Status	Tags	Actions
Oct 12, 2022	Brad is walking for FundRazr Foundation!	Brad Waterstreet	brad@cptest.me	\$500	\$0	Approved	Running		
Jun 20, 2022	Dave is walking for FundRazr Foundation!	Dave Waterstreet	dave@cptest.me	\$500	\$0	Approved	Running		
Jun 20, 2022	Team West Coast is walking for FundRazr Foundation!	Team West Coast	brad@cptest.me	\$500	\$550	Approved	Running		
May 12, 2022	Anna is walking for FundRazr Foundation!	Anna Waterstreet	anna@cptest.me	\$500	\$345	Approved	Running		

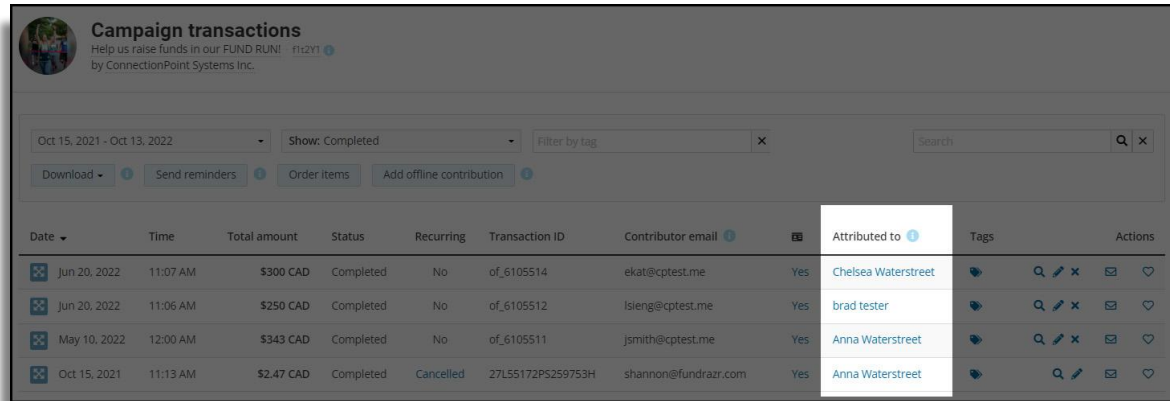
Showing 1 - 4 of 4 total

Changing Attributions

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.**



The screenshot shows the 'Campaign transactions' interface. At the top, there's a header with a profile picture and the text 'Campaign transactions' and 'Help us raise funds in our FUND RUN! 11/2/21 by ConnectionPoint Systems Inc.'. Below the header, there are filters for dates (Oct 15, 2021 - Oct 13, 2022), status (Show: Completed), and a search bar. There are also buttons for 'Download', 'Send reminders', 'Order items', and 'Add offline contribution'. The main part of the interface is a table with columns: Date, Time, Total amount, Status, Recurring, Transaction ID, Contributor email, Attributed to, Tags, and Actions. The 'Attributed to' column is expanded, showing a search input and a dropdown menu with the name 'brad tester' selected.

Date	Time	Total amount	Status	Recurring	Transaction ID	Contributor email	Attributed to	Tags	Actions
Jun 20, 2022	11:07 AM	\$300 CAD	Completed	No	of_6105514	ekat@cptest.me	Chelsea Waterstreet		
Jun 20, 2022	11:06 AM	\$250 CAD	Completed	No	of_6105512	lsiang@cptest.me	brad tester		
May 10, 2022	12:00 AM	\$343 CAD	Completed	No	of_6105511	jsmith@cptest.me	Anna Waterstreet		
Oct 15, 2021	11:13 AM	\$2.47 CAD	Completed	Cancelled	27L55172P5259753H	shannon@fundrazr.com	Anna Waterstreet		

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:

Change attribution

Who gets credit for this contribution?

Team member Team

Chelsea Waterstreet

Cancel Save

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