

# GrowthZone

# Managing Your Fundraisers

Cheri Petterson

# Agenda

- Setting Up a New Fundraiser Campaign
  - Sharing the Donation Link
- Managing Donations
- Fundraising Reports

# Overview

- The GrowthZone Fundraising module provides the functionality to manage fundraising campaigns for both pledge-based and non-pledge donations



# Add a Fundraiser Campaign

- WIKI: [Setting Up a New Fundraiser Campaign](#)

Add Campaign -
📄 ✕

Campaign Name

Start Date  📅

End Date  📅

Campaign Details i

Description will appear on Donation form for users to view.

Goal Amount

Primary Contact

Receipt Template  
 ▼

Fundraising Status  
 ▼

Allow Invoicing i

Collect Donor Message

Allow Tributes

Allow User To Create Account / Login

Advanced Options  Cancel Done

# Sharing your donation link

- A link is automatically created on the **Donation Setup** tab. This link may be shared in many ways:
  - On your public web-site: Embed this link on your web-site.
  - Email/Newsletters: Send the link via email or include in your newsletters.
  - Membership Application Form: You may choose to enable **Collect Donations** on your membership application form.
  - Event Registrations: You may choose to enable **Collect Donations** on your event registration forms.

**Special Olympics**

Summary | Donation Activity | Recurring | Donors | **Donation Setup**

---

**Campaign Options**

Allow Invoicing <input type="checkbox"/>	Collect Donor Message <input type="checkbox"/>	Allow Tributes <input type="checkbox"/>
---	---	--

Donation Link  
<https://cherissandbox.growthzoneapp.com/ap/donate/8VPNvOP9>

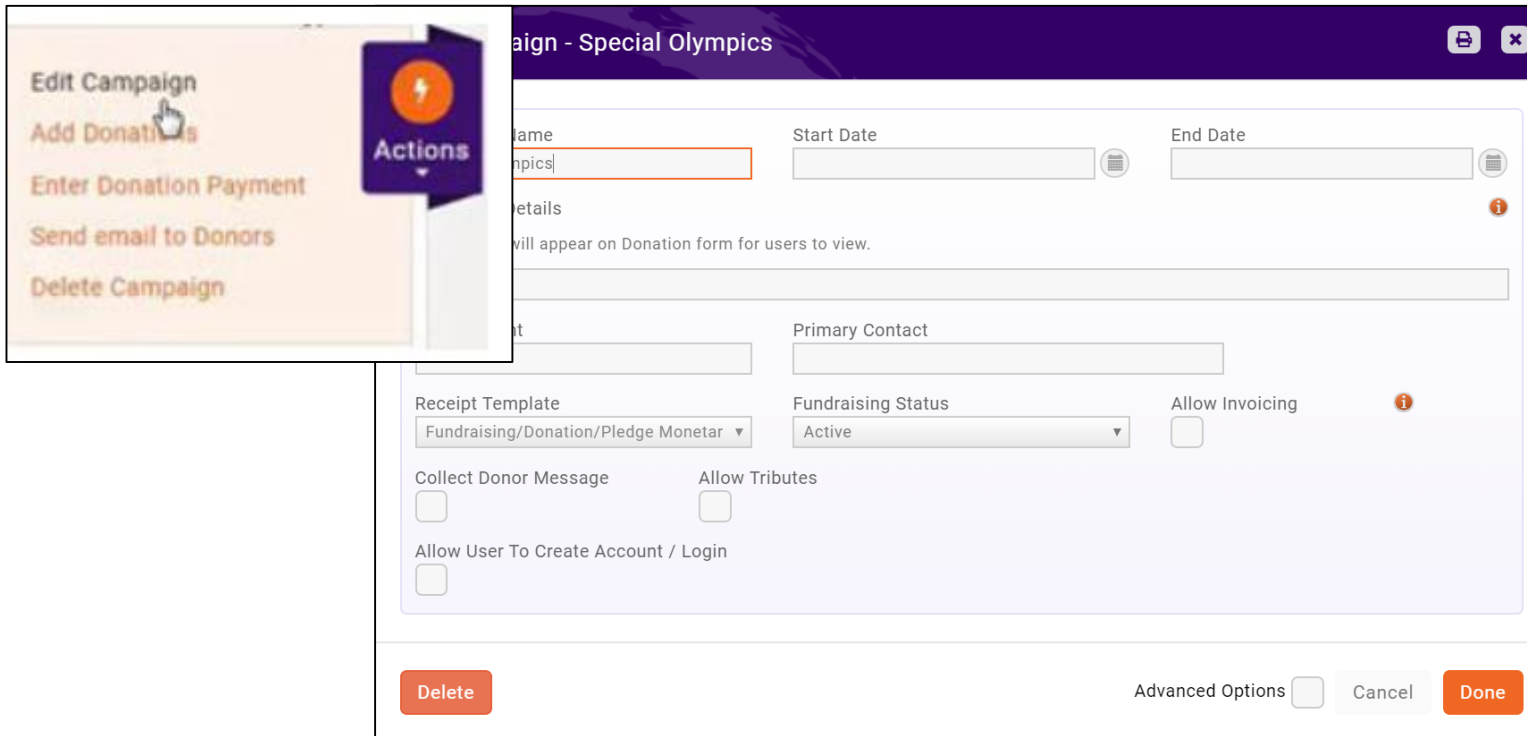
- WIKI: [Sharing the Fundraiser Link](#)

# Managing Donations

- Various functions are available in the Fundraising module to manage your donors and donation:
  - Edit your Fundraiser Campaign
  - Add Donations
  - Accept Donation Payments
  - Email Donors

# Edit your Fundraiser Campaign

- WIKI: [Edit Fundraiser Campaign Details](#)



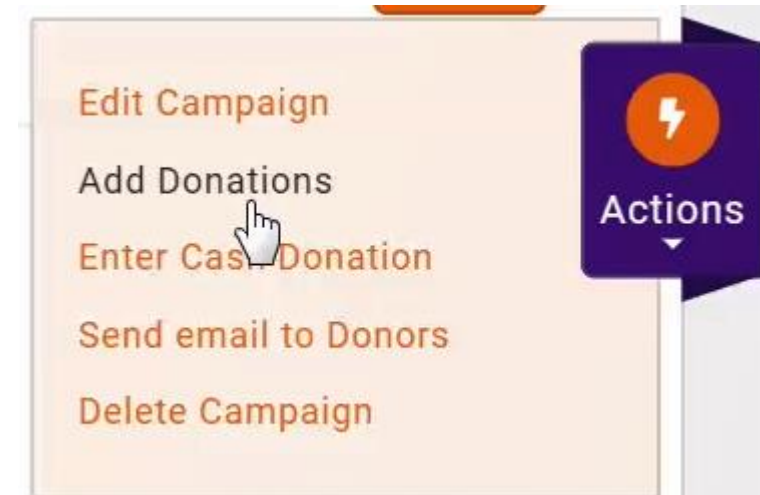
The screenshot displays the 'Edit Campaign' interface for a campaign titled 'Special Olympics'. On the left, a vertical sidebar contains the following actions: 'Edit Campaign', 'Add Donations', 'Enter Donation Payment', 'Send email to Donors', and 'Delete Campaign'. The main content area is titled 'Campaign - Special Olympics' and includes the following fields and options:

- Name:** Special Olympics
- Start Date:** [Empty field]
- End Date:** [Empty field]
- Details:** [Text area containing 'will appear on Donation form for users to view.']
- Primary Contact:** [Empty field]
- Receipt Template:** Fundraising/Donation/Pledge Monetar
- Fundraising Status:** Active
- Allow Invoicing:**
- Collect Donor Message:**
- Allow Tributes:**
- Allow User To Create Account / Login:**

At the bottom of the form, there are three buttons: 'Delete', 'Advanced Options' (with a checkbox), and 'Done'.

# Add Donations

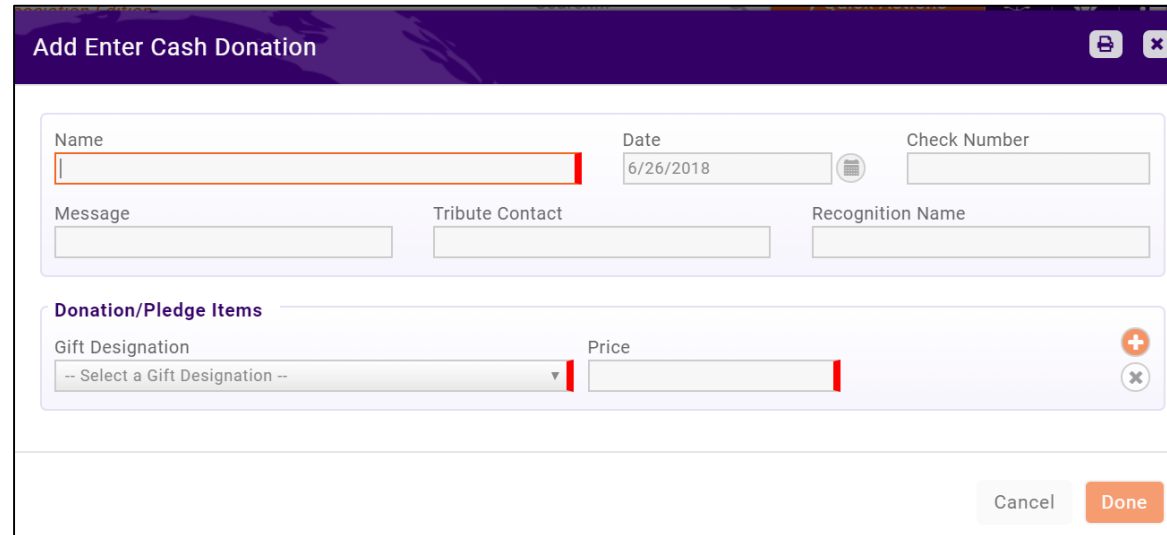
- You can provide the link that was automatically created to potential donors, add a fundraiser page to your web-site, or you may manually enter the donations through the back office
- WIKI: [Add Donations](#)





# Enter Cash Donations

- If you have received checks from individual who have not filled in your donation form, you can easily add the donation information and the payment at the same time



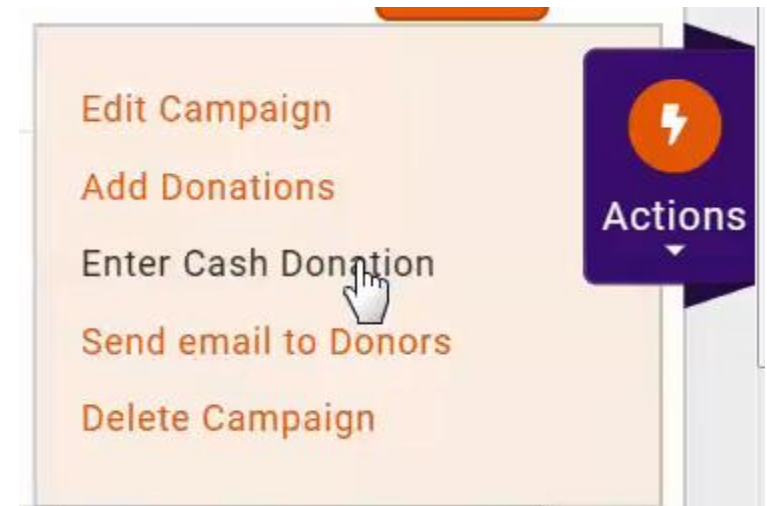
The screenshot shows a web form titled "Add Enter Cash Donation". The form is divided into several sections:

- Name:** A text input field.
- Date:** A date input field with the value "6/26/2018" and a calendar icon.
- Check Number:** A text input field.
- Message:** A text input field.
- Tribute Contact:** A text input field.
- Recognition Name:** A text input field.
- Donation/Pledge Items:** A section containing:
  - Gift Designation:** A dropdown menu with the text "-- Select a Gift Designation --".
  - Price:** A text input field.
  - A red plus sign icon (+) and a red minus sign icon (-) are located to the right of the Price field.

At the bottom right of the form, there are two buttons: "Cancel" and "Done".

# Enter Cash Donations

- **NOTE:** This option is **NOT** used to pay for existing invoices, only to enter a donor and a check received when a donation has not already been setup
- A thank you email is not sent
- WIKI: [Add Donor and Check Payment Simultaneously](#)








# View Donation Activity


- WIKI: [View all Donation Activity](#)

**Special Olympics**

Summary | **Donation Activity** | Recurring | Donors | Donation Setup

Search... Show only... Customize Results... 

Contact	Description	Total	Paid	Type	Purchase Date	Actions
<a href="#">Jane Jones</a>	Special Olympics	\$100.00	\$100.00	Non-Pledge Recurring Donation	8/14/2018	
<a href="#">Jane Jones</a>	Special Olympics	\$100.00	\$100.00	Non-Pledge Recurring Donation	8/14/2018	
<a href="#">Allison Wilson</a>	Special Olympics Donation	\$100.00	\$50.00	One Time Donation	6/14/2018	
<a href="#">Susan Williams</a>	Special Olympics Donation	\$50.00	\$0.00	One Time Donation	6/1/2018	

 **Actions**



# View Donation Activity


- WIKI: [View Recurring Donations](#)

## Special Olympics

Summary
Donation Activity
Recurring
Donors
Donation Setup

Customize Results...
Add Donations

Contact	Frequency	Total Pledge	Recurring Amount	Paid	Remaining	Start Date	End Date	Status	Actions
Susan Williams	Monthly	\$0.00	\$10.00	\$0.00		8/14/2017		Active	
Jane Jones	Semiannually	\$0.00	\$100.00	\$200.00		8/14/2017		Active	


  
 Actio

# View Donation Activity

- WIKI: [View List of All Donors](#)

### Special Olympics

Summary
Donation Activity
Recurring
Donors
Donation Setup

Show only...
▼

Customize Results...

Add Donations

Contact	Donations	Donated Total	Amount Collected/Paid	Total Committed
Cheri Petterson	2	\$300.00	\$100.00	\$300.00
John Jones	1	\$10.00	\$10.00	\$10.00
Susan Williams	8	\$80.00	\$0.00	\$80.00

⚡


**Actions**



# Viewing Fundraiser

- Fundraising Activity is visible on the individual's profile tab

**Special Olympics**

Summary | **Donation Activity** | Recurring | Donors | Donation Setup

Search... Show only... Customize Results... 

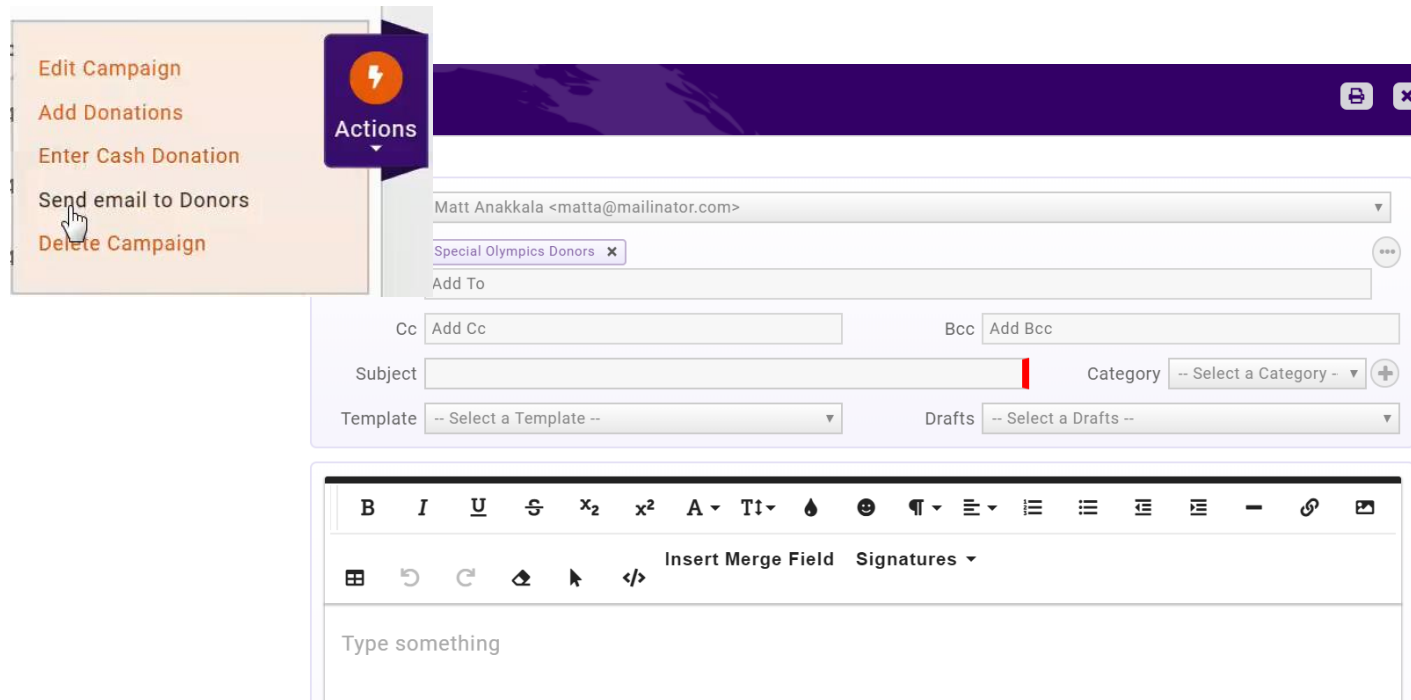
Contact	Description	Total	Paid	Type	Purchase Date	Actions
<a href="#">Jane Jones</a>	Special Olympics	\$100.00	\$100.00	Non-Pledge Recurring Donation	8/14/2018	
<a href="#">Jane Jones</a>	Special Olympics	\$100.00				

**Fundraising Activity**

Date	Description	Type	Amount	Actions
9/1/2017	Special Olympics	One Time Donation	\$10.00	
<b>Total</b>				

# Email Donors

- WIKI: [Email All Donors](#)



The screenshot displays an email campaign management interface. On the left, a vertical menu titled 'Actions' contains the following options: 'Edit Campaign', 'Add Donations', 'Enter Cash Donation', 'Send email to Donors' (highlighted with a mouse cursor), and 'Delete Campaign'. The main area shows an email composition form with the following fields:

- To:** Matt Anakkala <matta@mailinator.com>
- From:** Special Olympics Donors (with a close button 'x')
- Add To:** (empty text field)
- Cc:** Add Cc (text field)
- Bcc:** Add Bcc (text field)
- Subject:** (empty text field)
- Category:** -- Select a Category - (dropdown menu)
- Template:** -- Select a Template -- (dropdown menu)
- Drafts:** -- Select a Drafts -- (dropdown menu)

Below the form is a rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Text Color (x2), Background Color (x2), Font Color (A), Font Size (Tt), Bulleted List, Numbered List, Indent, Outdent, Link, and Unlink. Below the toolbar are buttons for 'Insert Merge Field' and 'Signatures', and a text input area with the placeholder text 'Type something'.

# Fundraising Reports

- Donation Summary
  - The Donation Summary tab in the Fundraising module will display a list of all donors to all campaigns
  - The summary may be filtered to a specific date range and/or a specific donor
  - The summary may be sent in an email



# Fundraising Reports

- WIKI: [Donation Summary](#)

Fundraising Campaigns
Donation Summary

Customize Results...
Email Donations Summary

Donor Name	Purchase Date	Purchase Ref Number	Amount	Paid Amount
Alan Brown	7/10/2017	170	\$100.00	\$100.00
Allison Wilson	6/14/2018	569	\$100.00	\$50.00
Bikes Bikes Bikes	6/1/2017	129	\$100.00	\$100.00
Cheri Petterson	3/16/2018	453	\$100.00	\$0.00
Cheri Petterson	3/16/2018	454	\$200.00	\$0.00

# Fundraising Reports

- Fundraiser History by Donor Report
  - The **Fundraising History By Donor Report** allows you to easily view the sum of donations for individual donors or all donors
  - It may be filtered to specific campaigns, or all of your current campaigns
  - If you have had a major push in fundraising over a period in time, you can filter the report to a selected date range

# Fundraising Reports

- WIKI: [Fundraiser History by Donor Report](#)

Results										
Campaign Name ↕	Donation/Pledge Item ↕	Donation/Pledge Description ↕	Donation Date ↕	Donor Name ↕	Donor Email ↕	Donor Address ↕	Donor City ↕	Donor State Province ↕	Donor Postal ↕	D P ↕
Childhood Arthritis										
Special Olympics	Special Olympics Pledge	Special Olympics	4/7/2017	Daphne Duck	dduck@mailinator.com					
Special Olympics	Special Olympics Pledge	Special Olympics	4/27/2017	Cherie Swanson	cherip12@yahoo.com					
Special Olympics	Special Olympics Pledge	Special Olympics	6/2/2017	Nora Breiby	nora@mailinator.com	1236 First Avenue	Deerwood	MN	56444	258
Special Olympics	Special Olympics Pledge	Special Olympics	6/21/2017	Mattson's Lumber						
Special Olympics	Special Olympics Pledge	Special Olympics	5/11/2017	Matt Anakkala	matta@mailinator.com					
Special Olympics	Special Olympics Pledge	Special Olympics	9/5/2017	Cheri Petterson	cheri.petterson@micronetonline.com	24400 Smiley Road	Nisswa	MN	56468	

# Fundraising Reports

- Recurring Donation Report
  - The **Recurring Donations Report** allows you to generate a list of all contacts who have setup recurring donations for a fundraiser
  - This report can be generated for all fundraisers or a specific fundraiser
- WIKI: [Recurring Donation Report](#)

# Fundraising Reports

- Recurring Donation Report

Results										
Donor Name ↕	Campaign Name ↕	Pledge/Donation Item ↕	Gift Designation ↕	Donation Created Date ↕	Donation Start Date ↕	Donation End Date ↕	Total Donation Amount ↕	Donation Amount Paid ↕	Donation Amount Remaining ↕	Tribute Name ↕
Jimbo Petterson	Alzheimers Research	Alzheimers Research	Alzheimers Research Donation	7/10/2017	7/10/2017		0.00	50.00	-50.00	Linda Petterson
Jimbo Petterson	Alzheimers Research	Alzheimers Research	Alzheimers Research Donation	8/10/2017	7/10/2017		0.00	50.00	-50.00	Linda Petterson
Jimbo Petterson	Alzheimers Research	Alzheimers Research	Alzheimers Research Donation	9/10/2017	7/10/2017		0.00	50.00	-50.00	Linda Petterson

# Thank You!

Join us for more training opportunities... [Click Here](#) to view the full calendar