

How-To Guide

How to Create Your Event for Share a Talent & Be a Host

CONTENTS

START A FUNDRAISER

- 02 Basic Fundraiser Info
- 03 Tickets and Merchandise
- 04 Registration and Sponsorship Packages
- 05 Enabling Personal & Team Fundraising Pages
- 06 Advanced Features

ADVANCED ADMIN FEATURES

- 07 Ticket Scanner
- 08 Promo Codes
- 09 Tribute Cards and Donation Matching
- **10** Custom Email Templates & Milestone Notifications

SHARING YOUR PAGE

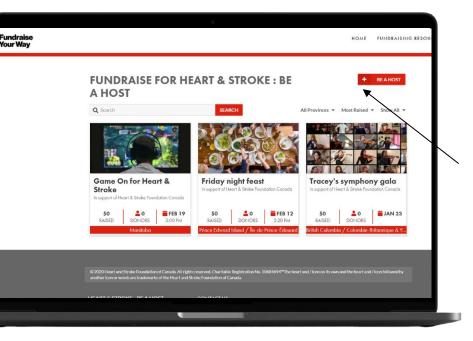
- **11** Creating Team Fundraising Pages
- **12** Creating Personal Fundraising Pages
- 13 Mailing List Feature

REPORTING & GUEST LISTS

14 Accessing Guest List and Detailed Report

Welcome!

Welcome to the Heart & Stroke Fundraise Your Way "how-to" guide! This guide will walk you through how to create your event online and customize it specifically for your fundraiser. Every feature you need – all in 10 minutes or less!



Step 1: Get Started

Go to your Heart & Stroke site and click the red "plus" button

Step 2: Fundraiser Info

The next page is where you will fill in the basic information about your fundraiser. If your fundraiser does not have a time, date or location, leave these features toggled off.

My event is bilingual 🕢			
My fundraiser name			
e.g. Friday Night Lights			
Provinces (if unsure click FAQ)			
choose a region	Ť		_
In support of Heart & Stroke Foundation Canada		Goal @ e.g. \$5,000	
My fundraiser has a date and time		My fundraiser has a location	
	CON	TINUE	
	CON	TINOL	

Donations are tax deductible

When this slider is enabled, an "Expense" field will appear. The expense is the dollar value of the benefit offered to donors (this amount is not tax deductible). For example, if you charge \$100 for a ticket to attend a dinner where the cost of the food is \$20, then your expense is \$20. When a donor

buys a ticket, they will receive a tax receipt for \$80, which is the cost of the ticket minus the expense. The "Expense" field will appear under all features when donations are tax deductible.

Step 3: Customize Tickets:

Turn on "This event has tickets" to enable tickets, then fill in your ticket tiers.

Everyone who buys a ticket will get an email with a PDF ticket attached (tickets can also be scanned). As the event organizer, you will be able to download a full guest list with one click.

If your tickets are tax deductible, turn on the "Donations are tax deductible" slider and enter your expense in the minimum donation amount field.

Donations are tax deductible 🚱				
NAME	PRICE	limit 💡	DESCRIPTION	
e.g. General Admission, etc	100 free	No Limit Set Limit	Item description	
My event has apparel / merch				
My event has apparel / merch				

vevent has apparel / merch		0		
nations are tax deductible 😡		0		
NAME	PRICE		limit ø	DESCRIPTION
T-Shirt	100 fre	20	No Limit	Item description
			SETLIMIT	attach photos (0 / 4)
Ø [©] APPAREL VARIATIONS: Ø ▶ Small ▶ Medium				×
▶Large				×
Extra Large				×
, Excia carge				

Fundraiser Apparel & Merchandise:

If you are looking to sell apparel or merchandise for your event, we've got you covered. Simply fill in the name of what you are selling, set the price and add any sizes or colours you would like to offer by clicking "add variations" located below the name field.

For events with registration that includes a t- shirt, simply put the name as "Registration t-shirt," and this feature will allow you to collect sizes from participants that register.

e.g. Team Registration 100 free 20 No Limit Item description This option has variations x DELETE e.g. Team Registration 100 free 20 No Limit Item description		vent requires registration						
e.g. Team Registration 100 free 20 SET LIMIT Item description A DELETE e.g. Team Registration 100 free 20 No Limit SET LIMIT Item description		NAME	PRICE				DESCRIPTION	
e.g. Team Registration 100 free 20 No Limit.	and a second	e.g. Team Registration	100	free	20		Item description	
e.g. Team Registration 100 free 20 SET LIMIT	Manual .	• This option has variations	L		â	4	× DELET	
This option has variations * DELETE	Supervise .	e.g. Team Registration	100	free	20		Item description	
		• This option has variations					× DELET	E
D REGISTRATION TYPE	4	ADD REGISTRATION TYPE						

Fundraiser Registration:

For events that require individual or team registration, we've made it easy. You can create as many registration tiers as you wish, and participants can register and pay directly online.

All participant information can be downloaded with one click, right to Excel.

Fundraiser Sponsors:

Event organizers can engage companies and organizations through our sponsorship feature.

Create as many different sponsorship tiers as you wish to offer, and companies can go to your fundraising page and purchase a sponsorship package online by credit card.

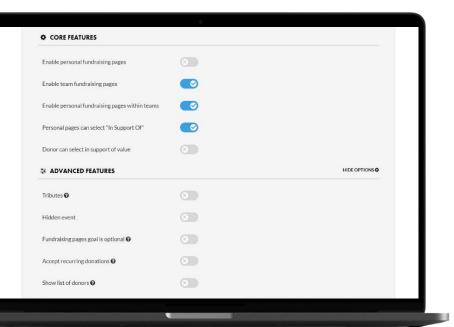
Common sponsorship tiers include offering the naming rights for the event, including company logos on apparel, and incorporating company logos on event signage.

	NAME OF SPONSORSHIP TIER	PRICE		DESCRIPTION
	e.g. Gold level sponsor	\$5,000	No Limit	Package description
+	e.g. Gold level sponsor	\$5,000	No Limit	Package description

Personal Fundraising Pages:

Personal Fundraising pages are your key to fundraising. It allows everyone involved to create a personal fundraising page that is part of your broader fundraising page. Turn on the toggle button for "Users can create personal fundraising pages" to enable this.

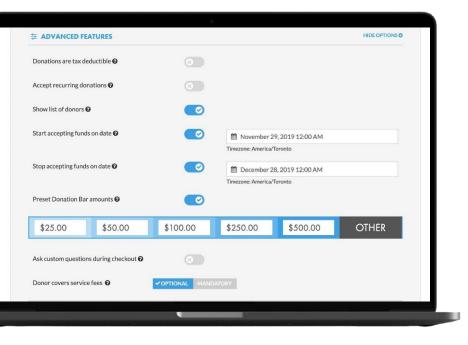
Enable personal fundraising pages		
Enable team fundraising pages		
Personal pages can select "In Support Of"		
Donor can select in support of value		
		HIDE OPTIONS C
Tributes 🕑		
Hidden event	8	
Fundraising pages goal is optional O		
Accept recurring donations 😧	8	
Show list of donors 😧		
Start accepting funds on date 🚱		



Team Fundraising Pages:

This will enable you to create team fundraising pages as part of the broader fundraising page. These pages willappear in a leaderboard format on the fundraising page. Turn on the toggle button "Users can create team fundraising pages" to enable this feature.

Personal pages can also exist within team pages.



Advanced Features:

Here you can choose to stop/start accepting donations on a certain date, add preset donation amounts, create custom questions, and enable a few other advanced features.

N.B. Certain advanced features can only be fully set up once the fundraiser has been created.

Custom Questions During Checkout:

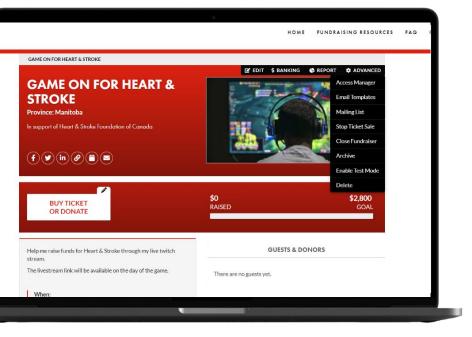
When "Ask Custom Questions during Checkout" is enabled, you can customize the checkout page for your fundraiser. To ask supporters questions, simply click "Add Question".

Organizers can allow supporter responses to be free- form with our text box option or they must select a response from a pre-set menu with our checklist and drop-down options.

You can choose when you would like questions to appear by clicking "When should these fields be shown?" and all responses can be downloaded to Excel with one click.

When should these fields be shown Always	v		
QUESTION		ТҮРЕ	REQUIR
Do you have any food allergies?		Text Box	•
How did you hear about the fundraiser?		Dropdown	•
✿S Answers ► Facebook			
Twitter			
• Word of Mouth			
Add option	ADD CANCEL		
ADD QUESTION			

Advanced Admin Features



After creating your fundraiser, you'll be able to fully enable promo codes, donation matching, tribute cards, and ticket scanning.

To do so, click the "Advanced" button in the top-right corner of your fundraising page and select the feature you would like to enable (you must be signed into your account in order to access this).

Ticket Scanner

If "Validate tickets with Ticket Scanner" has been enabled under Advanced Features, you will have the ability to access the ticket scanner for your fundraiser.

To get started, click "Advanced," then click "Scanners" from the fundraiser's main page. From the "Scanner" main page, click "Invite Scanner."

Inviting ticket scanners can be done by SMS or email. As the host of the fundraiser, you will be able to revoke active scanners and re-send invitations for inactive scanners.

			HOME	FUNDRAISING RESOURCES
	INVITE SCANNER			
GAME ON FOR				
CANN	Name			
CAN	1			
Back to Fur	Email SMS			
	Email			
				NVITE SCANNER
Name	An invite message will be se	nt to a person with a link to the scanner ap	p. The link cannot be used by more than one per	son at a time.
			INVITE	ANCEL
				_
		rights reserved. Charitable Registration N and Stroke Foundation of Canada.		
ART & STROK	KE - BE A HOST			
	ons	Email	Heart & Stroke F	harris Dellari



Scanner invitees will receive a message to scan tickets, which will include a URL that can be accessed through a web browser on any mobile device. Simply take a picture of the QR code on the ticket or use the search field (bottom left corner) to manually search for an attendee's name. There is no app or hardware required.

Please note that the scanning device must be connected to the internet.

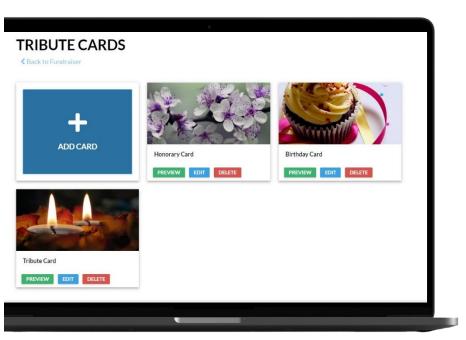
Promo Codes

From the fundraiser's main page, click "Advanced," then click "Promo Codes."

From the "Promo Codes" main page, click "Add New Promo Code," enter a name for the coupon code and select one of "Flat Discount" or "Custom Pricing" as your coupon type.

From the dropdown menu, select what you would like the coupon code to apply to and enter the preferred price or discount amount/percentage. You can also add expiry dates and limits to the number of times a code can be used.

ndraise ir Way				HOME	FUNDRAISING
	GAME ON FOR HEART & STRO	KE			
	PROMO COI	DES			
	K Back to Fundraiser	dd new promo	code		
		Promo Code	1		ADD NEW PRO
	PROMO CODE	Туре	FLAT DISCOUNT CUSTOM PRI	ICING	
		Apply to Items	Please select	•	
			Add limit		
			Add Expiration Date		
	_	SAVE CANCEL			_
	© 2020 Heart and Stroke Foundation another icon or words are trademark		served. Charitable Registration No. 1068469 e Foundation of Canada.		
	HEART & STROKE - BE A HO		CONTACT US		
	Terms and Conditions		Email undraiseyourway@heartandstroke.ca	Heart & Stroke Prive https://www.heartar	



Tribute Cards

From the fundraiser's main page, click "Advanced," then click "Tribute Cards."

On the Tributes Card page, you will be able to add and edit the e- cards that are sent out with tribute donations. To add a new card, click the "Add Card" button, enter the card name, upload the card image, and edit the card content.

When checking out, donors will be able to select their desired card from the available options which will be sent to the recipient.

Donation Matching

From the fundraiser's main page, click "Advanced," then click "Donation Matching."

On the Donation Matching Settings page, you can enter and edit the names and donation amounts for the sponsors who will be funding the campaign. These amounts will make up the pool from which donations will be matched. You will be notified when the pool is nearing depletion.

You can also select the multiplier that will applied to all donations until the pool runs out.

DONATION MATCHING SETTINGS

POOL AMOUNT	1	Fotal: \$10,000.0	00	Used: \$0.00	Remaining: \$10,00	0.00
Multiplier 🔞						
2X			5X			
Example: \$100.00 donation becomes \$2 \$100.00 donation + \$100.00 r						
SPONSORS						
		OUNT				
	TOTAL POOL AM	OUNT.				
	TOTAL POOL AM	OUNT.	AMOUNT	PRIVATE? @)	
SPONSORS MAKE UP YOUR	TOTAL POOL AM	OUNT.	AMOUNT \$15,000	PRIVATE? @	SAV	/E CANC
SPONSORS MAKE UP YOUR	TOTAL POOL AM	OUNT.				
SPONSORS MAKE UP YOUR NAME CrowdChange	TOTAL POOL AM	OUNT.	\$15,000	8	SAV	
SPONSORS MAKE UP YOUR NAME CrowdChange	TOTAL POOL AM		\$15,000	8	SAV	

Custom Automated Email Templates

You can view, edit, and manage automated emails sent to your supporters by clicking "Advanced," then selecting "Email Templates."

TRACEY BAKES A CAKE		
TRACEY BAKES A CA	KE	EDIT \$ BANKING REPORT AC Access Manage
Province: Manitoba		Email Template
In support of Heart & Stroke Foundation of Canad	a 📃	Donation Match
		Mailing List
		Manage Person
f y in Ø 🗃 🖻		Stop Ticket Sale
		Close Fundraise
		Archive
	TE A PAGE \$0 RAISED	Enable Test Mo
OR DONATE OF	RTEAM	Delete

TRACEY BAK	ES A CAKE																	
MAIL Back to ma		PLA	TES	5														
Donor rece																	^	
	il is automatica e my own text		donor	when sa	omeone	makes a	donatii	on or a	purcha	858.								
Subject:	Thank you f	or donating	8j															
Add Dyna	amic Flelds *	Font -	۳Ţ	١.	в /	6	A	A	Ξ.	:=	=	°°.	۵.	-	Θ.	T,	20	
Dear (fin Thank ye	elping to fund st-name), ou for your ger oport will help f /hy.	nerous dor	nation.	Please	find you							I.					Å	
• Every f	ive minutes, s	omeone in	this co	untry o	lies from	heart c	lisease	strok	e and v	ascula	ar impi	irmen	t.					
• The ne	ed to treat the	se disease	as is m	ore urg	ent than	ever -	people	with th	nese co	ndition	ns are	at high	ier risl	c for c	omplie	ations,	and	
									_		_			_			_	

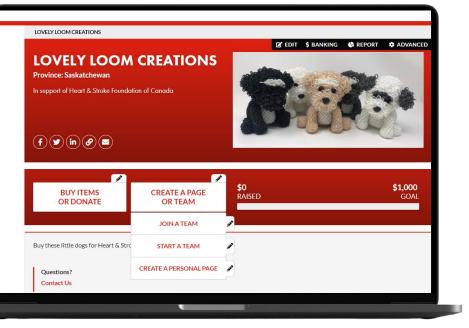
To view an existing automated email template, click the down arrow to the right of the template. If you would like to edit or change the text, click "I want to use my own text." Enter the new text for the template, then click "Save."

Milestone Notifications

To create a "Milestone Notification," start by clicking "Add Milestone Notification" and entering a name for the template. Next, you will need to select whether this notification will be sent when a fundraising page reaches a specific dollar amount raised, or a certain percentage of its fundraising goal.

ESTONE NOTIFICATIO	NS									
ications that will be automatica	lly sent to fundrais	er page owners wh	nen fundrals	er reaches cert	ain goals.					
New Template										
Template Name:										
Send when:				\$ RAISED	% RAISED					
Subject:										
Add Dynamic Fields *	Font - T	¶_ B	/ 8	A, M,	≡, ≔	:=	_ନ ୁ ଲେ	- e	Ţ.	
and provide the second second second			-							

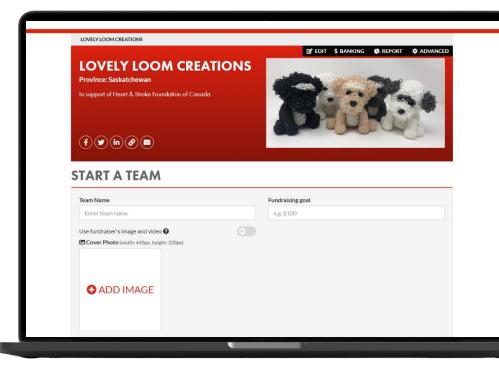
Creating A Team Fundraising Page



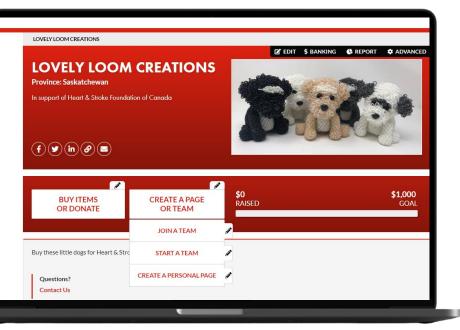
Step 1: From the fundraiser's main page, click "Create a Page or Team", then click "Start a Team".

Step 2: Enter a team name and your team's fundraising goal. Then select whether you would like to upload your own image, video and/or description text on your team page, then click "Start a Team".

If you have not already done so, you will be prompted to create an account. This can be done by entering your first and last name, email address and creating a password.



Creating A Personal Fundraising Page



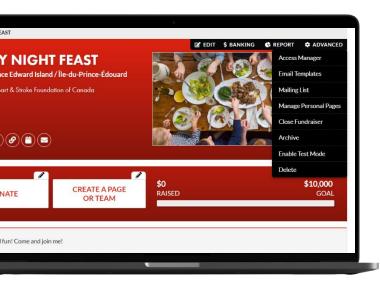
Step 1: From the fundraiser's main page, click 'Create a Page or Team', then click "Create a Personal Page." Personal pages can also be created as part of a team by clicking "Join a Team."

John Smith e.g. \$100 Use fundraiser's image and video ? Cover Photo (width: 640px, height: 320px) ADD IMAGE I want to add a video/embed livestream (Youtube/Vimeo) ? Use fundraiser's description text ? E About Add Dynamic Fields Font Font V	Use fundraiser's image and video 🚱 😒 Cover Photo (width: 640px, height: 320px) C ADD IMAGE I want to add a video/embed livestream (Youtube/Vimeo) 🕑 😒 Use fundraiser's description text 🖓 😒 E About Add Dynamic Fields x Ent x	Name your personal page		Fundraisi	ng goal
Cover Photo (width: 640px, height: 320px) ADD IMAGE I want to add a video/embed livestream (Youtube/Vimeo) Use fundraiser's description text E About Add Dynamic Fields x Font x	Cover Photo (width: 640px, height: 320px) ADD IMAGE I want to add a video/embed livestream (Youtube/Vimeo) Use fundraiser's description text	John Smith		e.g. \$10	0
ADD IMAGE I want to add a video/embed livestream (Youtube/Vimeo) Use fundraiser's description text	ADD IMAGE I want to add a video/embed livestream (Youtube/Vimeo) Use fundraiser's description text	Use fundraiser's image and	d video 🕜		
I want to add a video/embed livestream (Youtube/Vimeo) ? Use fundraiser's description text ? E About	I want to add a video/embed livestream (Youtube/Vimeo) ? Use fundraiser's description text ? E About	Cover Photo (width: 640	px, height: 320px)		
Use fundraiser's description text	Use fundraiser's description text	G ADD IMAC	6E		
E About	E About	I want to add a video/emb	ed livestream (Youtube/Vimeo)	0 🗵	
Add Dynamic Fields * Font *	Add Dynamic Fields * Font *	Use fundraiser's description	on text 😮	×	
Add Dynamic Fields - Font	Add Dynamic Fields * Font *	≣About			
		Add Dynamic Fields -	Font •	• •	-

START A FUNDRAISING PAGE

Step 2: Enter your fundraising goal, select whether you would like to upload your own image, video, and description text on your personal page, then click "Start a Fundraising Page."

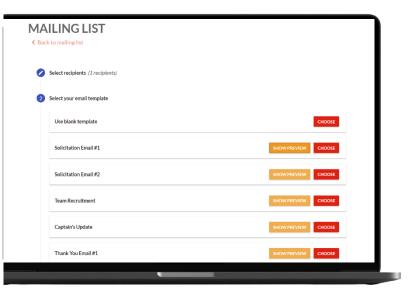
Using the Mailing List to Share Your Page



Step 1: Click the "Email" icon located next to the Link and calendar icons. Alternatively, this can be accessed by clicking Advanced and selecting "mailing list".

Step 2: Click on Create Campaign. This will bring up the names and email addresses from every completed transaction within this page. Use the search bar to find the sponsor's contact information and click the check box to the left of that contact. Click Continue at the bottom of the page.

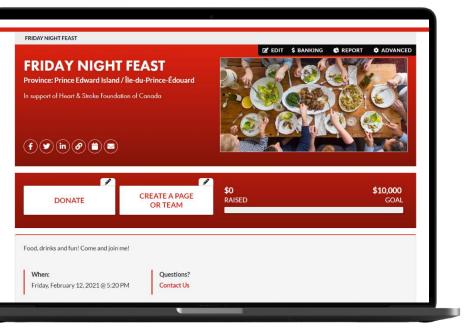
1	Select rec	ipients (Orecipients)			
	Importe	d Contacts		•	ADD CONTA
	Enter	name or email to filter th	e list		
		FIRST NAME	LAST NAME	EMAIL	STATUS
		John	Smith	John.Smith@gmail.com	Subscribed
				Items per page 10)▼ 1-1of1 <



Step 3: Select a pre-written email template or use the blank template to create your own message. Make any additional edits and click Send in the bottom right corner of the page.

There is an option to save this message as a template for future use so you can use it again if you would like.

Reporting and Guest Lists



Access your report: Once you have created a fundraiser, you can click on the "Report" button to view fundraiser information, including a breakdown of ticket sales, apparel, donations, and more.

Guest List Report: By clicking "Guest List Report," we will then email you a guest list. Included will be the names of everyone that purchased tickets, registration, and/or apparel in an Excel file.

Detailed Report: This is a more detailed report that includes answers to custom questions, sponsorship levels, donor email addresses, amounts raised by team & personal fundraising pages, and more.

Deservices	\$100 O						
- Donations:	\$100.0						
- Offline:	\$4,500.						
- Registrations:	\$25.00						
lotal:	\$4,845	.00					
ees not covered	d 0 : (\$15.4))					
TOTAL AFTER	FEES: \$4,829						
	Total am	ount after fees = Amount raised - Fees not cov	ered				
1 Tickets Ov						_	EST LIST REPORT
I LICKETS OV							
Click on the iten	n to filter activity	r in detailed report				GU	
Click on the iten Registratic Click on the Iten Detailed Rep	n to filter activity on Overview n to filter activity ort						
Click on the iten Registratic Click on the iten Detailed Rep Click on the iten	n to filter activity on Overview n to filter activity ort		CONTACTABLE	AMOUNT	FEES	NET	
Click on the iten Click on the iten Click on the iten Detailed Rep Click on the iten ID NA	n to filter activity on Overview n to filter activity ort n to view details	v in detailed report	CONTACTABLE	AMOUNT \$3,500.00	FEES \$0.00		A EXPORT
Click on the iten Click on the iten Click on the iten Detailed Rep Click on the iten ID NA 228235 Tin	n to filter activity on Overview n to filter activity ort n to view details	v in detailed report				NET	A EXPORT TAX ELIGIBLE
Click on the iten Click on the iten Click on the iten Detailed Rep Click on the iten ID NA 228235 Tin	n to filter activity on Overview n to filter activity ort n to view details ME a Richards a Stevens	v in detailed report	~	\$3,500.00	\$0.00	NET \$3,500.00	TAX ELIGIBLE \$0.00
Click on the iten Click on the iten Click on the iten Detailed Rep Click on the iten D NA 228235 Tin 228234 Jim	n to filter activity on Overview n to filter activity ort n to view details ME a Richards a Stevens Jared Allen	in detailed report E-MAIL	*	\$3,500.00 \$1,000.00	\$0.00 \$0.00	NET \$3,500.00 \$1,000.00 \$125.00	EXPORT TAX ELIGIBLE \$0.00 \$0.00

Thank you for supporting Heart & Stroke! If you have any questions, reach out to us at <u>fundraiseyourway@heartandstroke.ca</u>