How-To Guide

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

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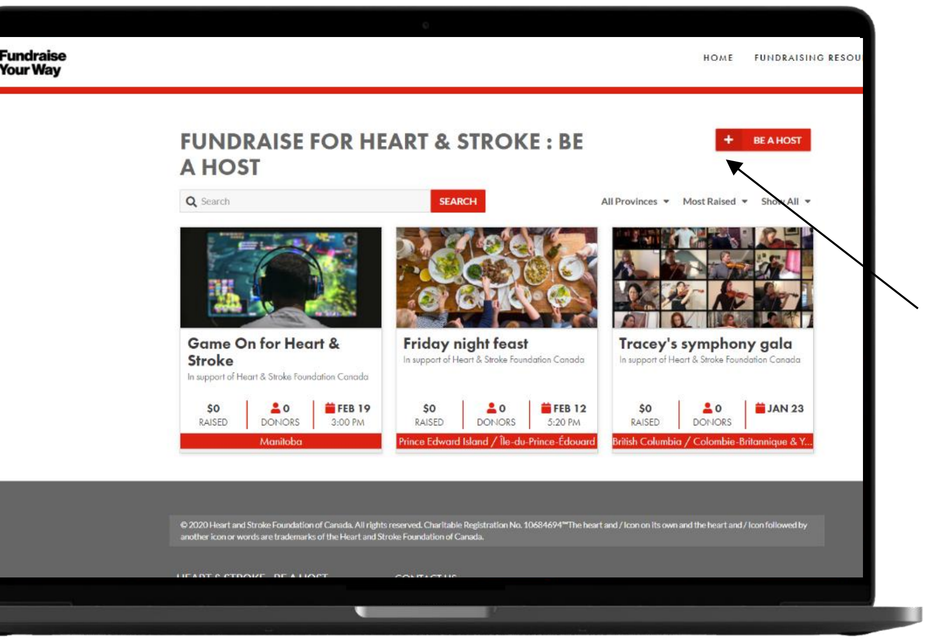
Welcome!

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!

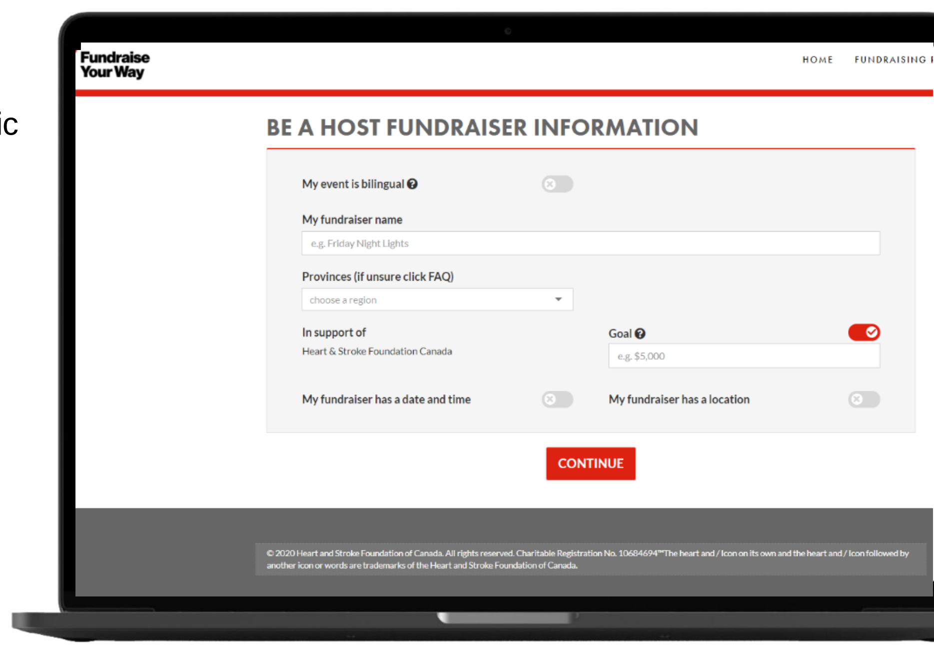


Step 1: Get Started

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.



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.

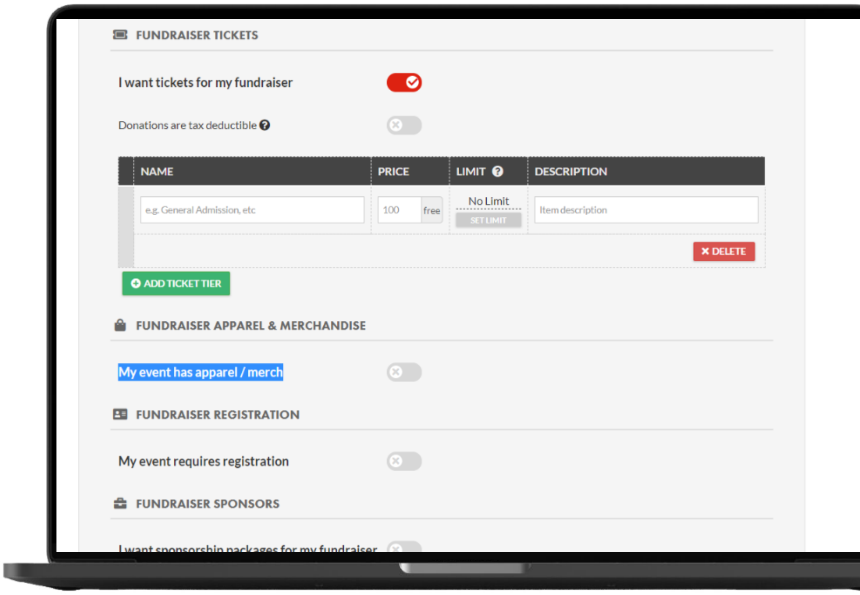
Step 3: Customize

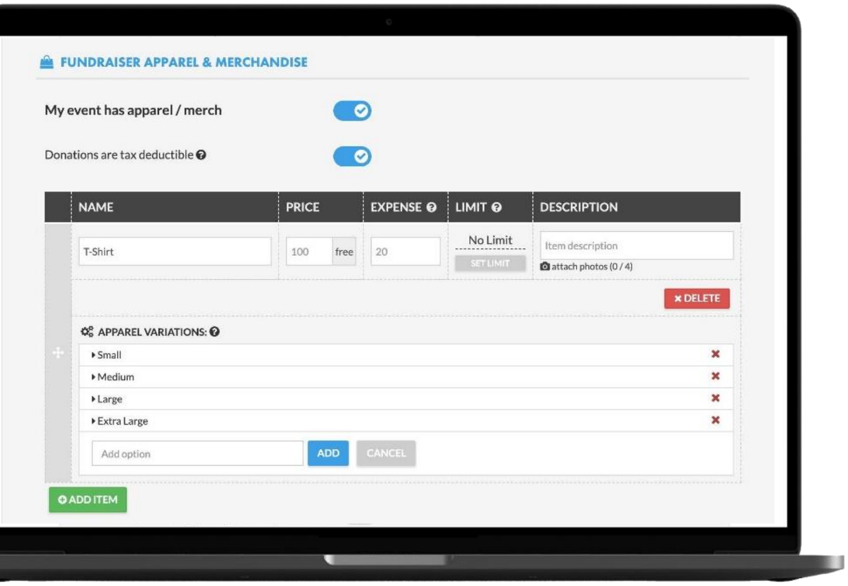
Tickets:

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.

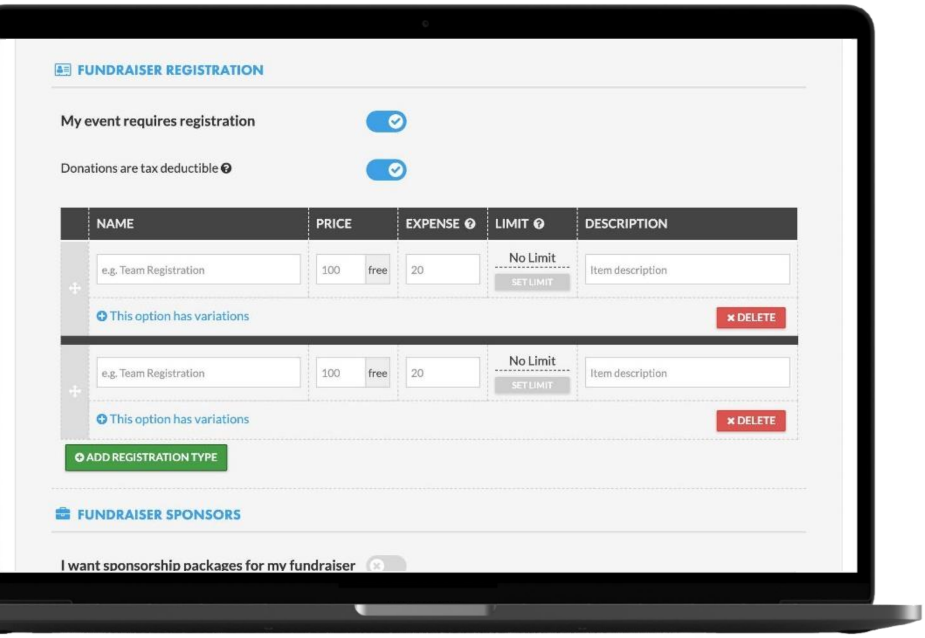




Fundraiser Apparel & Merchandise:

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.



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.

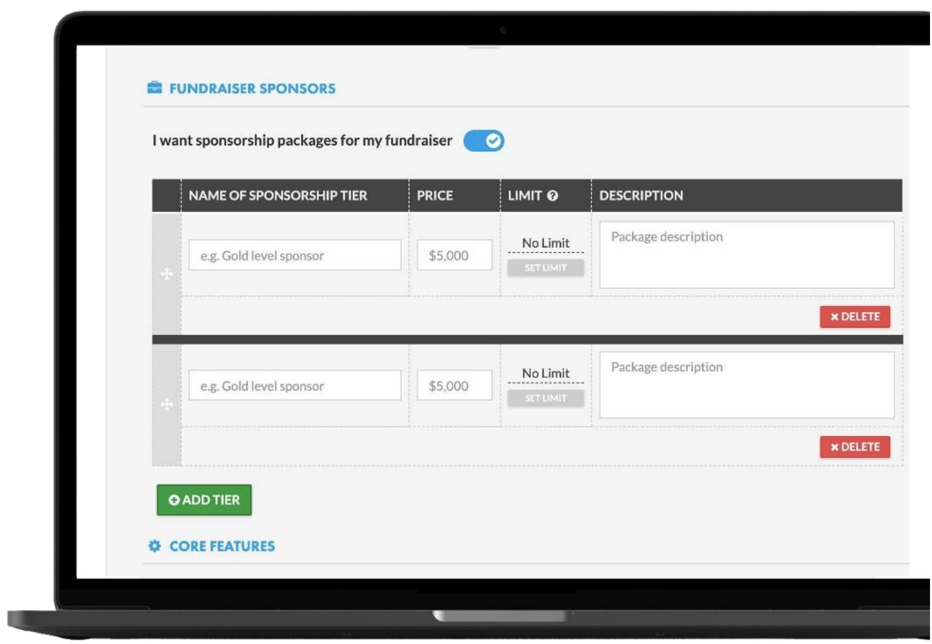
All participant information can be downloaded with one click, right to Excel.

Fundraiser Sponsors:

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

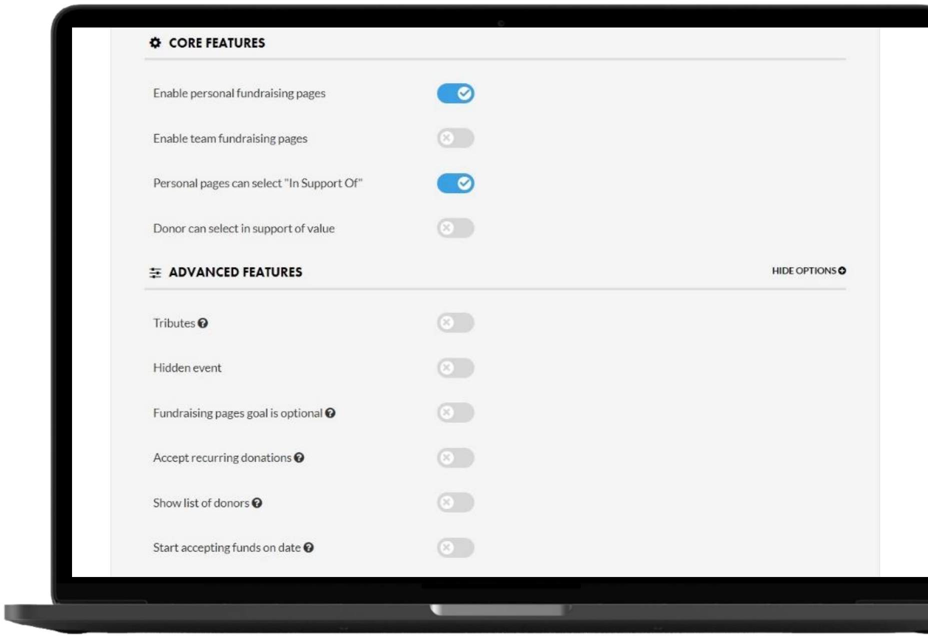
Create as many different sponsorship tiers as you wish to offer, and companies can go to your fundraising page and purchase a sponsorship package online by credit card.

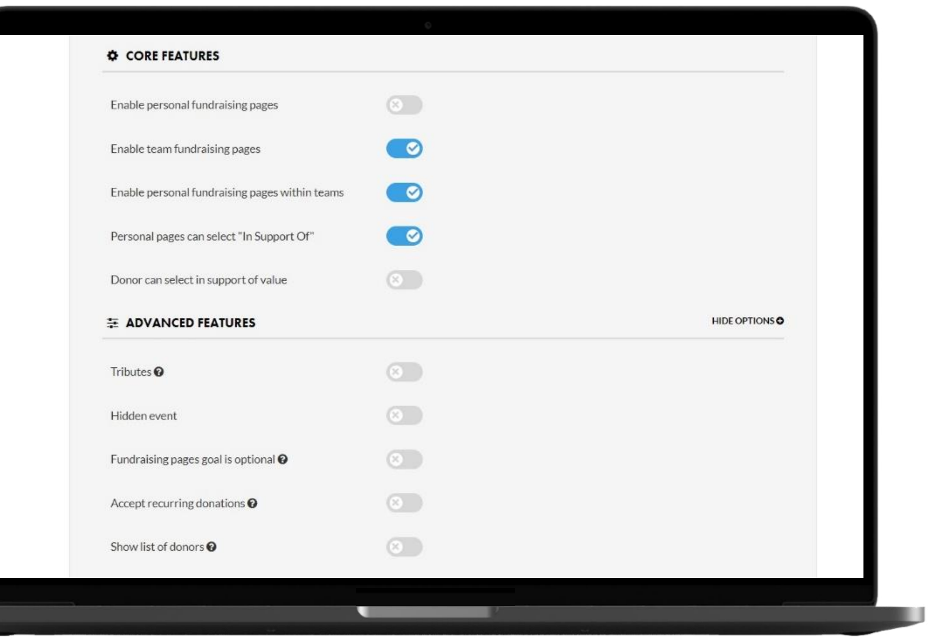
Common sponsorship tiers include offering the naming rights for the event, including company logos on apparel, and incorporating company logos on event signage.



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.

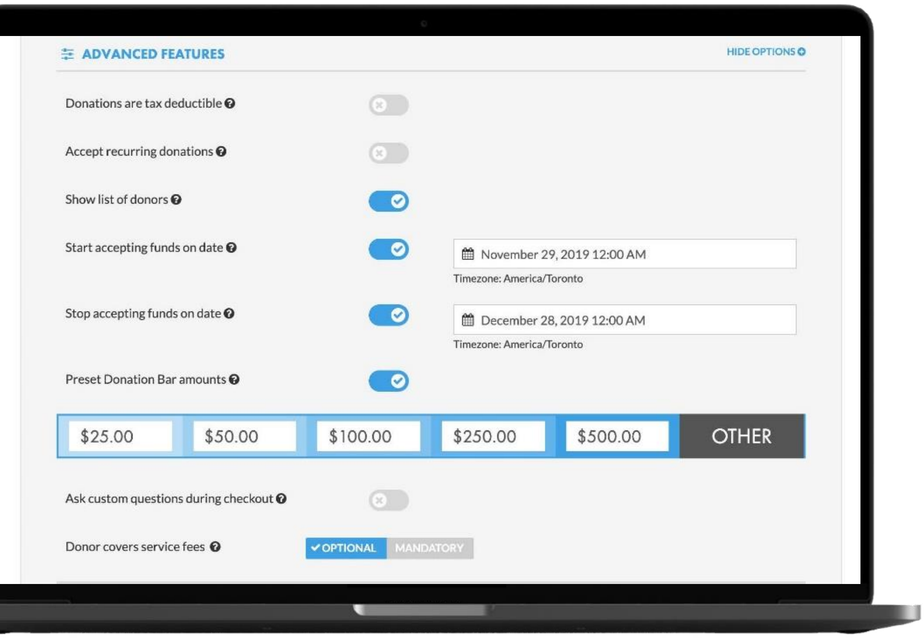




Team Fundraising Pages:

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.

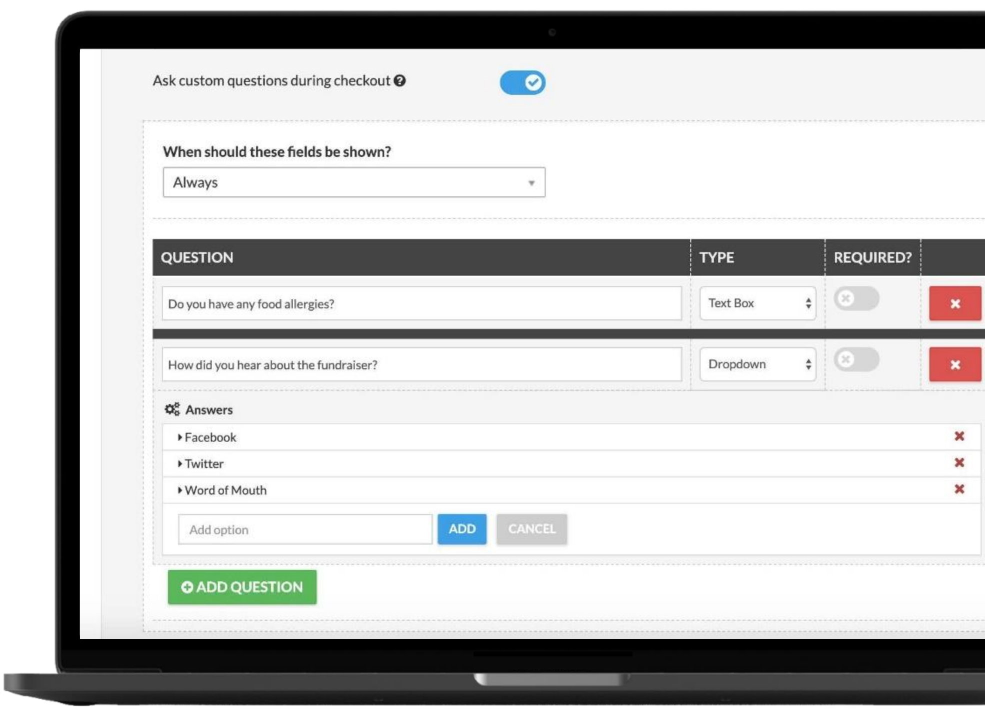
N.B. Certain advanced features can only be fully set up once the fundraiser has been created.

Custom Questions During Checkout:

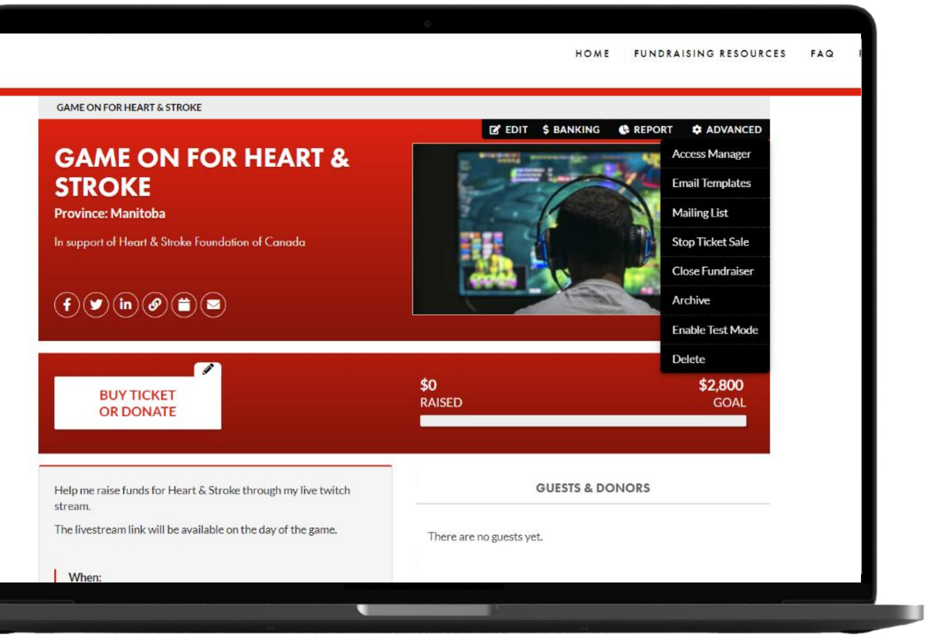
When "Ask Custom Questions during Checkout" is enabled, you can customize the checkout page for your fundraiser. To ask supporters questions, simply click "Add Question".

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.



Advanced Admin Features



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

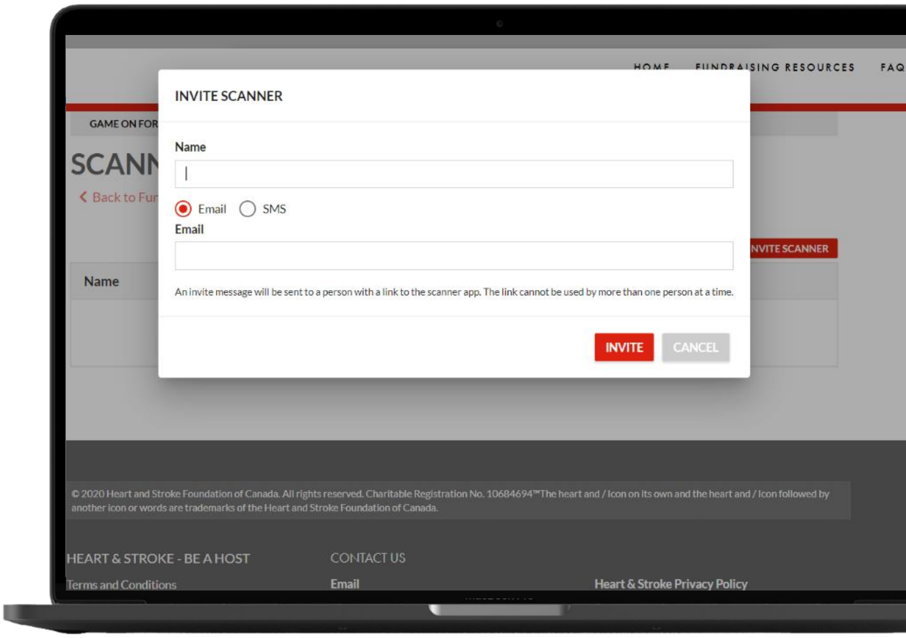
To do so, click the "Advanced" button in the top-right corner of your fundraising page and select the feature you would like to enable (you must be signed into your account in order to access this).

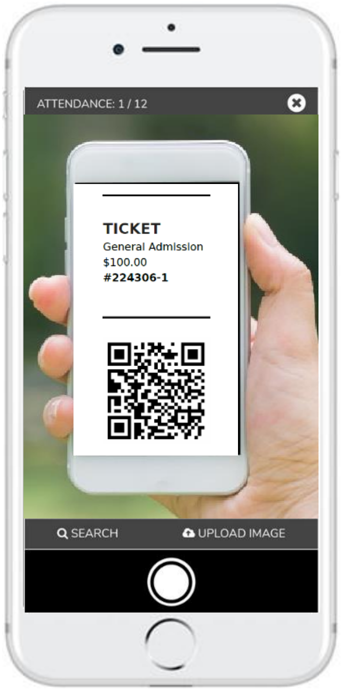
Ticket Scanner

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.





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.

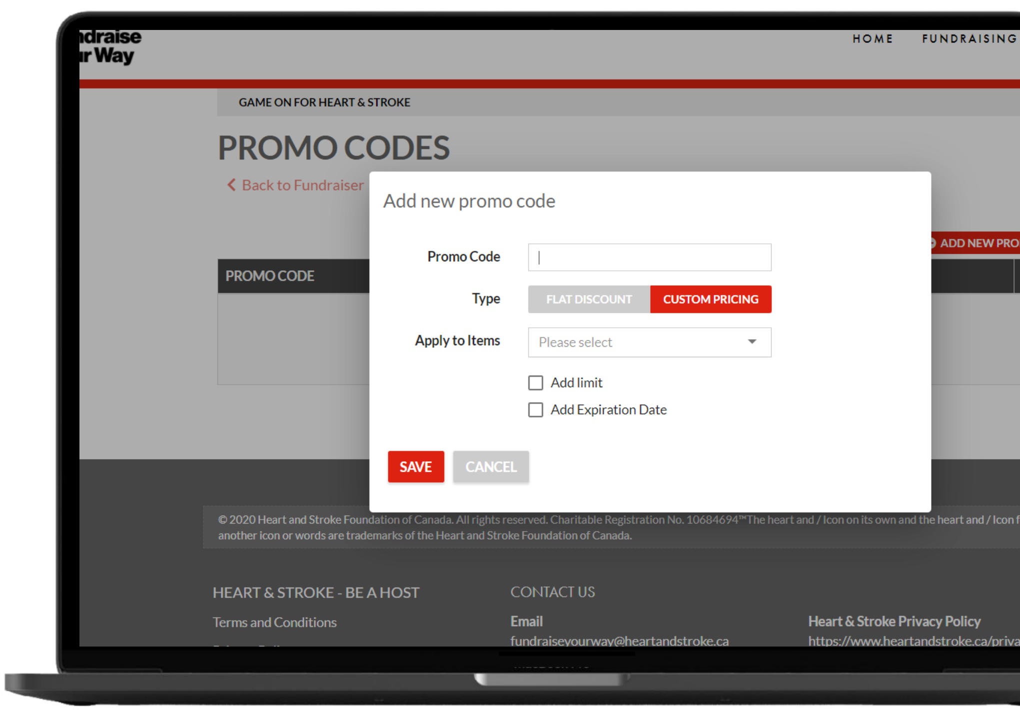
Please note that the scanning device must be connected to the internet.

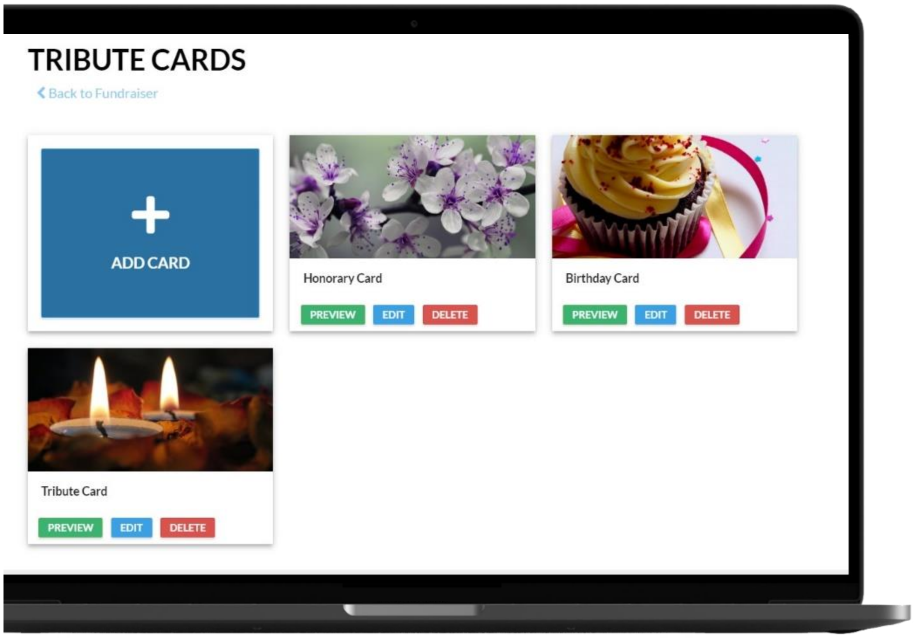
Promo Codes

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.





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.

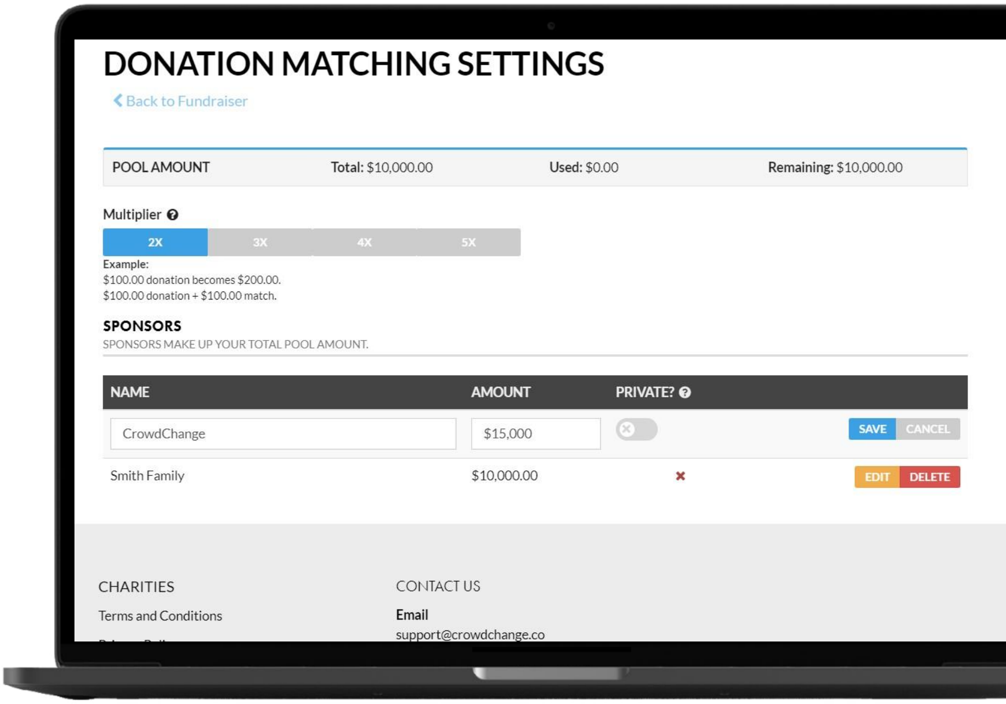
When checking out, donors will be able to select their desired card from the available options which will be sent to the recipient.

Donation Matching

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

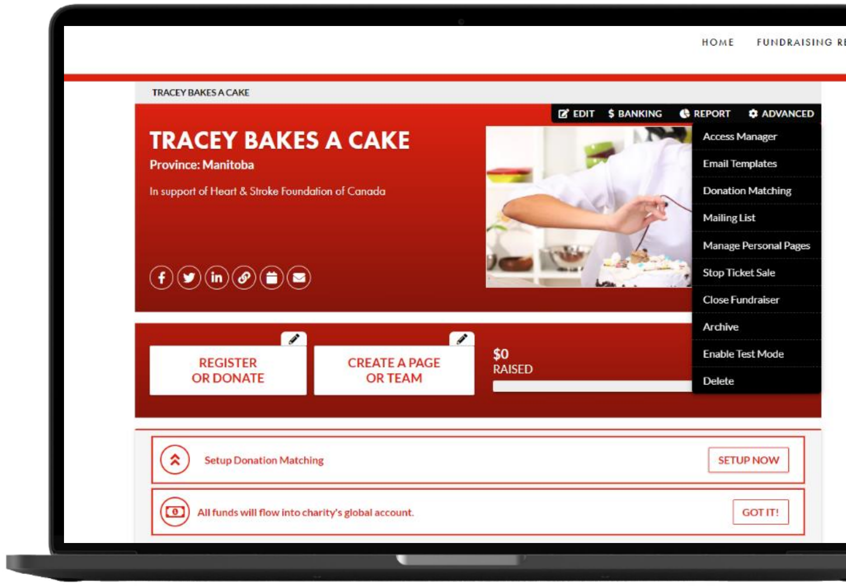
On the Donation Matching Settings page, you can enter and edit the names and donation amounts for the sponsors who will be funding the campaign. These amounts will make up the pool from which donations will be matched. You will be notified when the pool is nearing depletion.

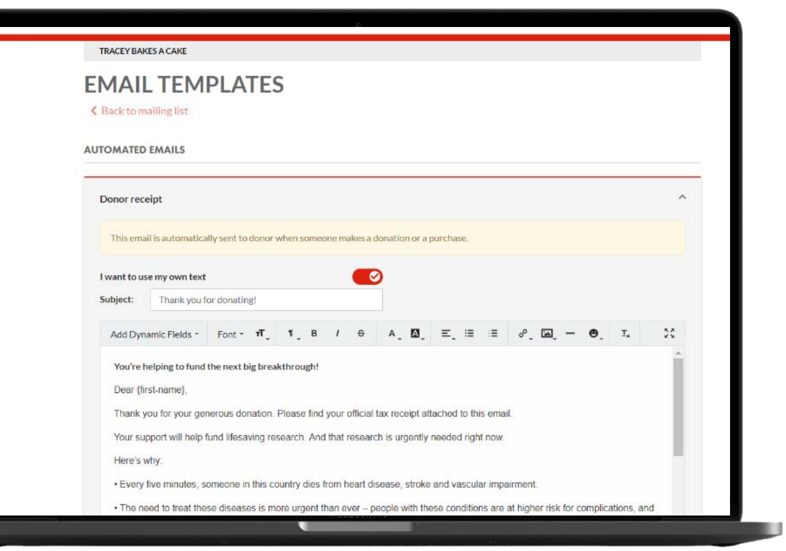
You can also select the multiplier that will applied to all donations until the pool runs out.



Custom Automated Email Templates

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

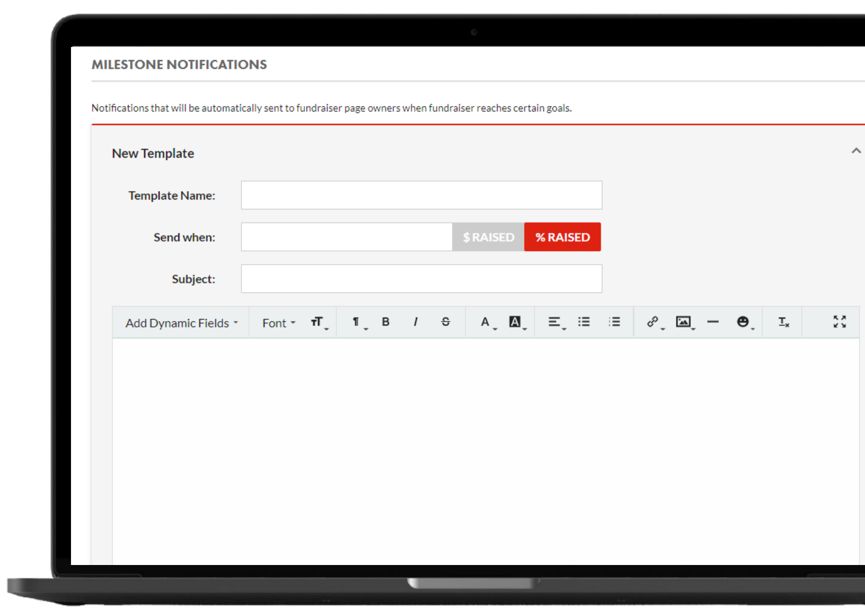




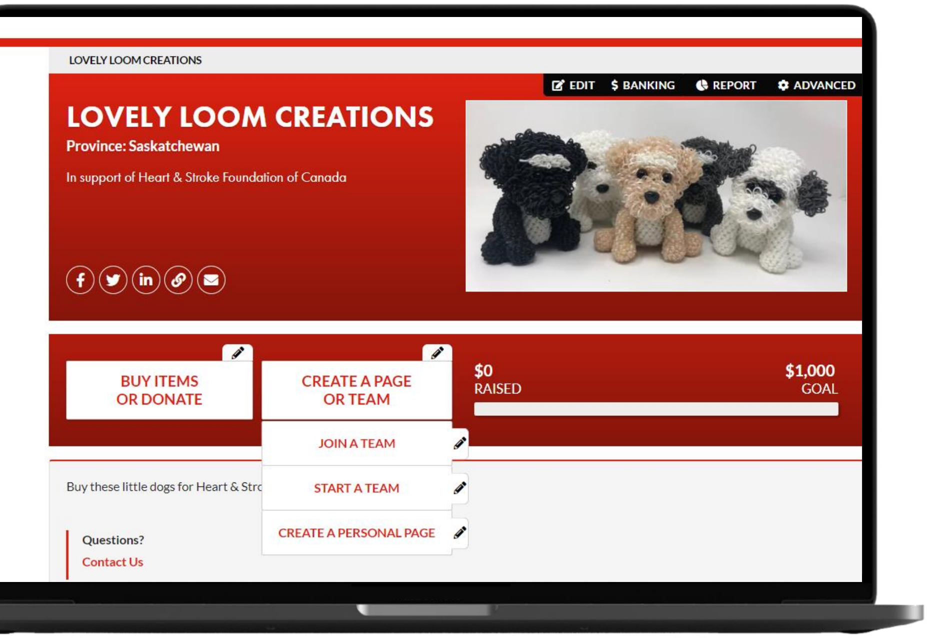
To view an existing automated email template, click the down arrow to the right of the template. If you would like to edit or change the text, click "I want to use my own text." Enter the new text for the template, then click "Save."

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.



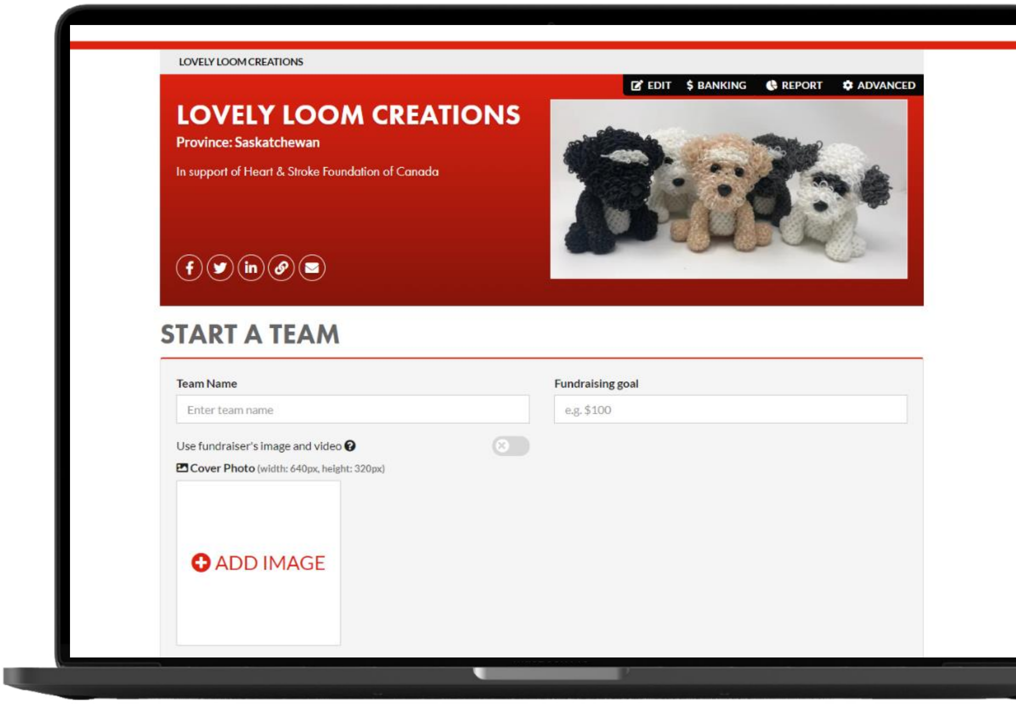
Creating A Team Fundraising Page



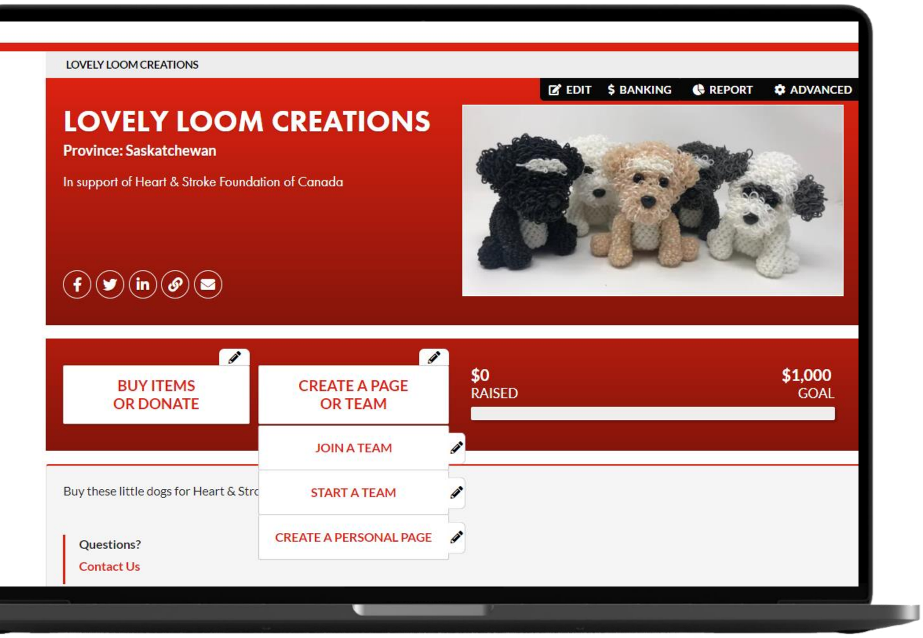
Step 1: From the fundraiser's main page, click "Create a Page or Team", then click "Start a Team".

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".

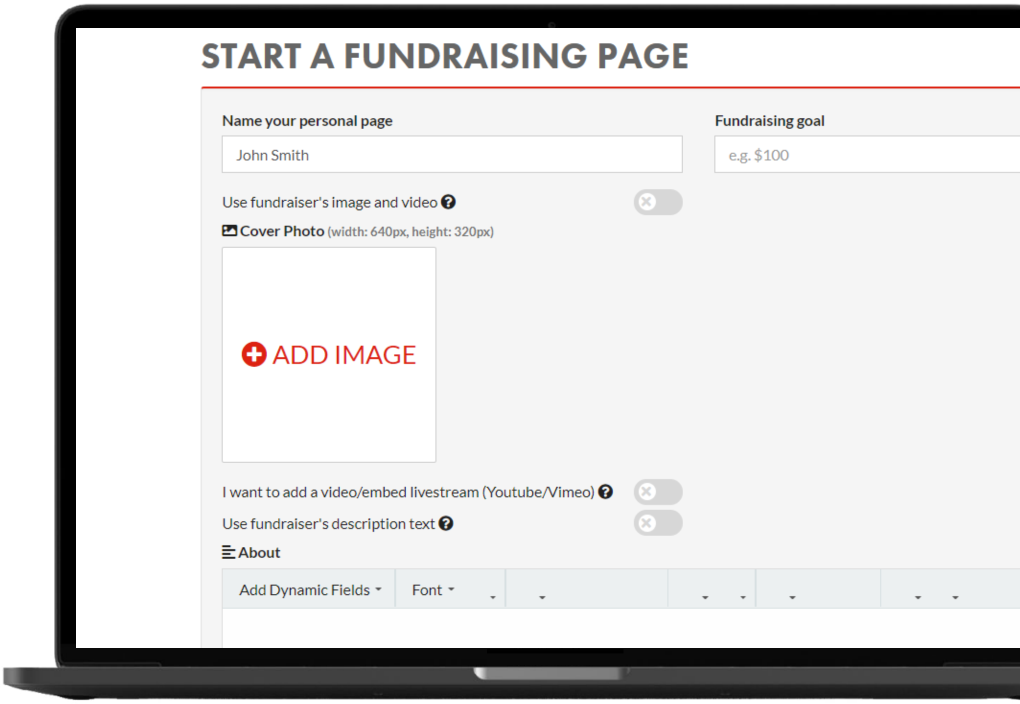
If you have not already done so, you will be prompted to create an account. This can be done by entering your first and last name, email address and creating a password.



Creating A Personal Fundraising Page

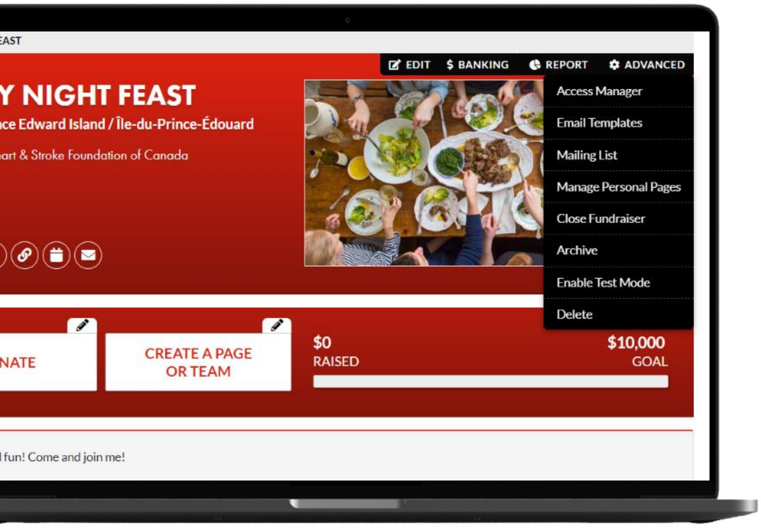


Step 1: From the fundraiser's main page, click 'Create a Page or Team', then click "Create a Personal Page." Personal pages can also be created as part of a team by clicking "Join a Team."



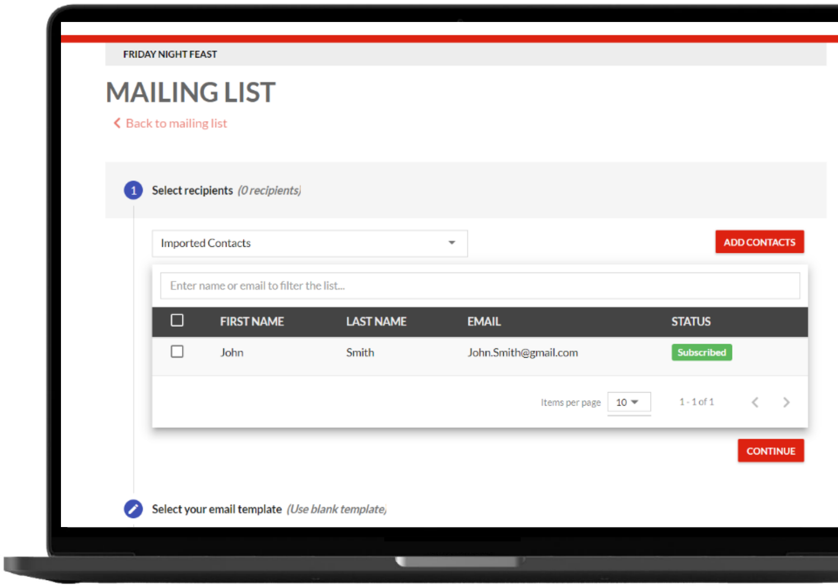
Step 2: Enter your fundraising goal, select whether you would like to upload your own image, video, and description text on your personal page, then click "Start a Fundraising Page."

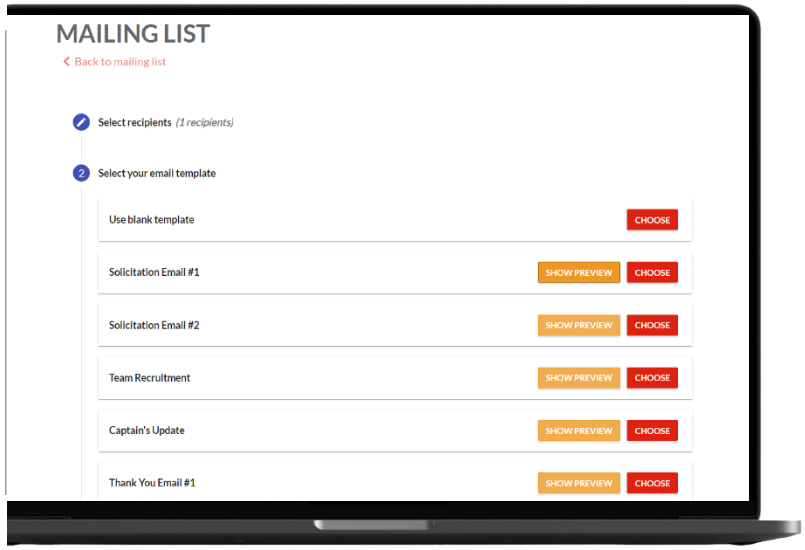
Using the Mailing List to Share Your Page



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.

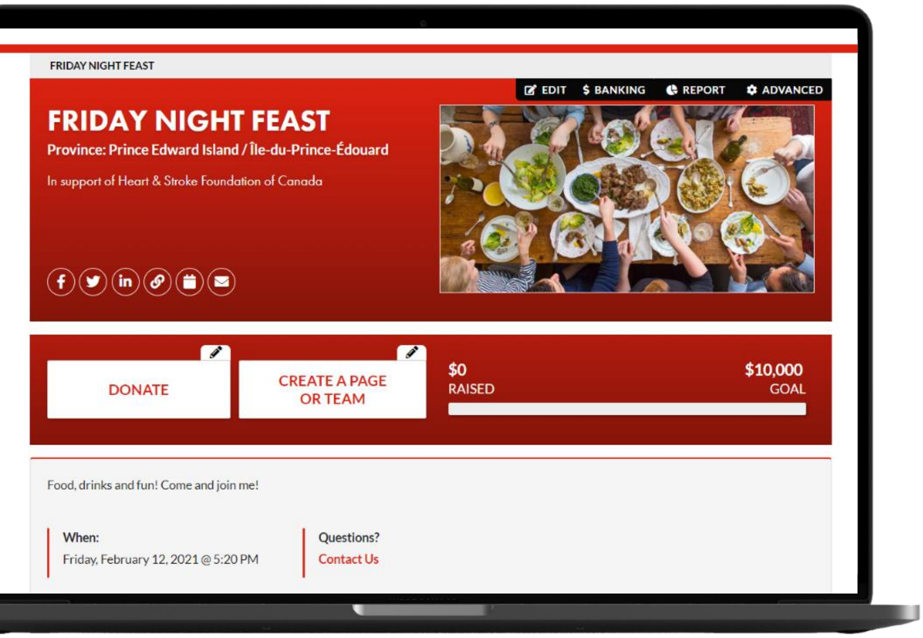




Step 3: Select a pre-written email template or use the blank template to create your own message. Make any additional edits and click Send in the bottom right corner of the page.

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

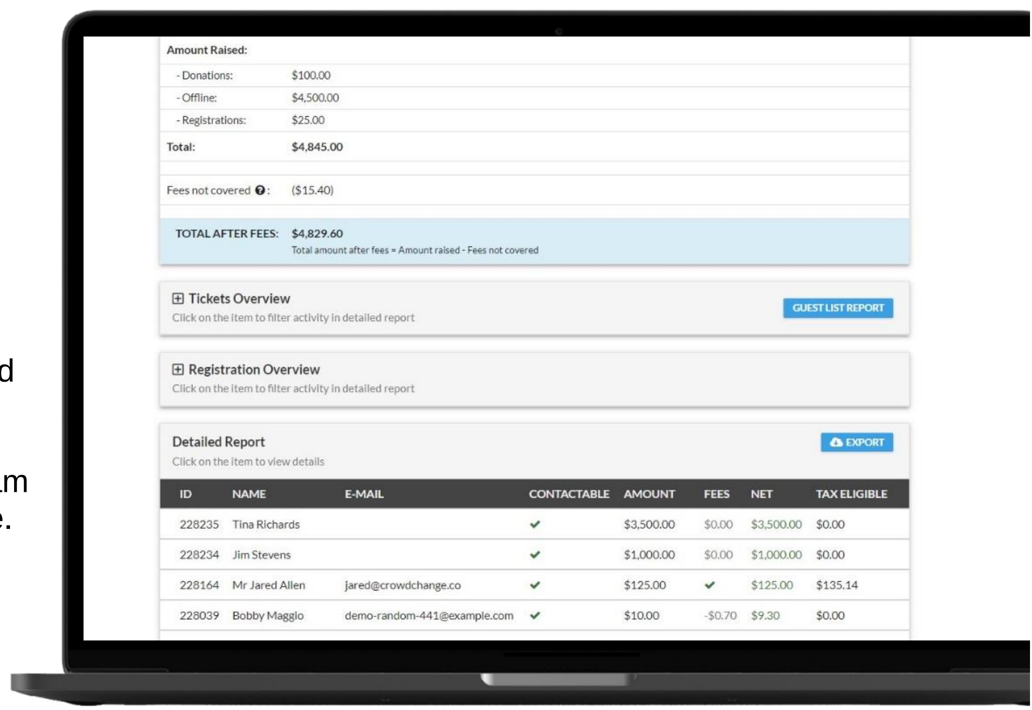
Reporting and Guest Lists



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.



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