CrowdChange Manual

CROWDCHANGE INSTRUCTIONS

Each philanthropy event you host should utilize CrowdChange to collect money. Use the instructions below to create and manage your CrowdChange event pages.

CONTENTS

1. **HOW TO: CREATE A CROWDCHANGE EVENT PAGE**

- ☐ Click the **Start A Fundraiser** button in the top-right corner of your CrowdChange site.
- ☐ Fill out the **General Info** page using the following template
    - Fundraiser Name- Chapter Letter – Semester Year – Event Name
        - For example- Omega Omega- Fall 2023- Are You Smarter Than a Phi Sig
    - In support of– This is where you will list where your donation is going. Either the Phi Sigma Sigma Foundation, your chapter's Community Impact Fund, or another philanthropic organization of your choice
        - For example- Omega Omega Community Impact Fund
    - Goal- You can turn the goal feature on or off, and set it to either a certain amount raised, or a certain number of donors.
    - Date and time- Turn this on if you want to show a start date / time for your philanthropy event.
    - Fundraiser has an end date and time- Turn this on if you want to show an end date / time for your philanthropy event.
    - Fundraiser has a location- Turn this on if you want to show the location of your philanthropy event.
    - Fundraiser Description- Enter all the information donors & participants will need to know. This description must include:
        - Specifically where your donations are going
        - Background on the charity or fund
        - Use the prompt below and fill in your own information:
            - This event is in support of our chapter's Community Impact Fund through the Phi Sigma Sigma Foundation to support the cause of college and school readiness and our local partner school. (include any other details you would like)
    - Cover Image- Upload a banner / header image for your event.
    - Add a Video- Allows you to paste a video link so that a video will be displayed instead of the

Cover Photo on your fundraising page.

- ☐ Under **Purchase options** enable any features you want to use for your philanthropy event:
  - o My event has tickets- See **How Ticketing Works**
  - o My event has apparel / merchandise- See **How Merchandise Works**
  - o My event has registration - See **How Registration Works**
  - o My event offers sponsorship packages- See **How Sponsorship Works**
  - o My fundraiser has custom questions- See **How to Use Custom Questions**
- ☐ Click **Next** and enable **Peer-to-peer features**:
  - o Personal fundraising pages - See **How to Create a Personal Fundraising Page**
  - o Team fundraising pages - See **How to Create a Team & Invite Members**
  - o Personal fundraising pages within teams- Allow personal pages to be created under teams.
  - o Set default content for personal pages- Set a default description for personal pages.
  - o Set default content for team pages- Set a default description for team pages.
- ☐ Click the **Create Fundraiser** button to sign up or log in if you haven't already. Keep in mind you can only edit your event from the account you created it with
- ☐ After you create the page, it will be sent to Phi Sigma Sigma HQ for approval. You can expect it to be approved or to be contacted to edit the page within 1 week.
- ☐ After your CrowdChange page is approved, you can start sharing the link and collecting money!
- ☐ After your event is over, go back to your event page and close the event within 48 hours

2. HOW TO: CLOSE A CROWDCHANGE EVENT PAGE

- ☐ From the fundraiser, click: Advanced → Actions → Close Fundraiser → Yes
- ☐ This will close the fundraiser and stop it from accepting ticket sales or transactions of any kind.

3. HOW TO: REOPEN A CROWDCHANGE EVENT PAGE

- ☐ From the fundraiser, click: **Advanced → Actions → Re-open Fundraiser → Yes**
- ☐ This will reopen the fundraiser and allow all transactions to proceed.
- ☐ This should only be used to collect donations for the same event. If you are hosting this event a separate time, you need to create a new event page and not reopen a previous one.

4. HOW TO: CHANGE THE DATE OR TIME OF YOUR EVENT

- ☐ Go to your fundraising page on your CrowdChange site and **Log In**.
- ☐ Click on **Edit** in the upper right hand corner.
- ☐ On the **General Info** page, scroll down to **Date and time**, and enter the new date & time.
- ☐ *Optional - click **Fundraiser has an end date and time** and set an end date & time.*
- ☐ Scroll to the bottom and click **Next**.
- ☐ On the **Additional Settings** page, scroll down to **Advanced features** and enable **Stop accepting funds on date** to enter the new date & time you want to stop accepting funds.
- ☐ *Optional - click **Start accepting funds on date** and set a date & time to start accepting funds.*

- ☐ Scroll to the bottom and click **Save Changes.**

5. **HOW TO: CHANGE YOUR EVENT COVER PHOTO**

- ☐ From your fundraising page, click **Edit**, then scroll down to **Cover Image**.
- ☐ Click the **pencil** icon to choose a new image, or the **trash can** icon to remove the current one.
- ☐ Select the new image from your computer, crop and edit as desired, then click **Save**.
- ☐ Lastly, click **Next** and **Save Changes** at the bottom of the fundraiser edit pages.

6. **HOW TO: DUPLICATE A CROWDCHANGE PAGE**

Duplicating can save you a lot of time when setting up a new fundraiser. Instead of having to start from scratch, you can use a previously created fundraiser as a template to get started.

To duplicate a CrowdChange page, follow these steps:

1. Go to the CrowdChange page you would like to duplicate and **Log In**.
2. Click **Advanced → Actions → Duplicate fundraiser**.
3. Enter a New Event Name, select what features to include and click **Create New Fundraiser**.

7. **HOW TO: ACCESS YOUR EVENT'S DONATIONS REPORT**

- ☐ Go to your CrowdChange site and **Log In**.
- ☐ Go to your fundraising page.
- ☐ Click **Report** > **Donations Report**.
- ☐ You will be shown an **Overview** with the following information:
- ☐ Depending on which Purchase options you have enabled, you will be shown further Overview sections with some basic details like sales of tickets, apparel, registration, etc, as well as information on teams and personal pages within your fundraiser. You can download any of these overview sections to Excel by clicking their **Download** button.
- ☐ If you need to see specific transactions and transaction details, scroll down to the **Detailed Report** section. Here you can search for specific transactions by Name, Email, and Transaction ID, and you can see the details of each transaction, including the amount, display name used, answers to custom questions, and more. You can see which team and/or personal page the donation was made to and change this via the **Change team or page** button.
- ☐ You can download the Excel version of this report via the **Download** button in the top right corner.

8. **MORE INFORMATION: HOW TICKETING WORKS**

- ☐ Need to sell tickets? No problem, just turn on our **Fundraiser Tickets** feature!
- ☐ You can create as many ticket tiers (with variations) as desired, and participants can pay directly online.
- ☐ Upon purchase confirmation, the donor will receive an email receipt with their tickets attached as a PDF.
- ☐ To set up tickets within your fundraiser, follow these simple steps:
- ☐ Go to your fundraiser, **Log In**, and click **Edit**.
- ☐ On the **General Info** page, scroll down to **Purchase Options**, and toggle on **My event has tickets**.

- ☐ Click **Next**.
- ☐ On the **Additional Settings** page, scroll down and click **Save Changes**.
- ☐ Within the **Setup Tickets** banner prompt on your fundraiser, click **Setup Now** (Or go to **Advanced > Setup > Tickets**).
- ☐ On the Purchase Options page that appears, click **Show Details** next to Tickets.
- ☐ Add tickets by clicking '**Add Ticket Tier**'.
- ☐ Set a **name**, **price** (if desired), **limit** (if desired), and **description**.
- ☐ Add any variations to this ticket by clicking '**Add variation'**. All variations will carry the same price.
- ☐ Click **Save** when finished.
- ☐ If desired, you may set a date to automatically close ticket sales by clicking '**Set auto-close date**'
- ☐ Click **Save Settings** to confirm.

9. **MORE INFORMATION: HOW REGISTRATION WORKS**

- ☐ Scroll down to **Purchase options**, toggle on **My event has registration** and click **Next**.
- ☐ On the **Additional Settings** page, scroll down and click **Save Changes**.
- ☐ A message will pop up saying "Would you like to configure tickets and merchandise now?" - Select **Go to Tickets & Merchandise**. You will also see a **Setup Registration** prompt on the main fundraising page. Click **Setup Now** to be taken to the same place.
- ☐ On the Purchase options page that appears, click **Show Details** next to Registration.
- ☐ Add registrations by clicking **Add Registration Type**.
- ☐ Set **name**, **price** (if desired), **limit** (if desired), and **description**.
- ☐ Add any variations by clicking **Add variation**.
- ☐ Click **Save** when finished.