



Online/Virtual Fundraiser Guide

EVENT DAY

Execute Your Fundraiser! Optimize the logistics of the donor experience.

Coordinate admin permissions

- Review the GiveSmart User Role Permissions and add admin to your campaign with the appropriate limited administrative role of your choice.

Set-up revenue and/or bids displays to visually engage guests in the action.

- Be sensitive to potential donor's feelings when considering whether or not to display bidder/donor names alongside dollar amounts.
- Embed the display in a custom section on your Home Page to provide recognition for funds raised or incorporate into your virtual program.

Assign an Admin to orchestrate your Communication Plan.

- For drafted, unscheduled text messages, ensure an admin is tasked with sending out the message and knows what queues to listen/look for.
- Consider scheduling text messages to automatically send if they will not be tied to specific moments in your program.

Check-in for virtual guests

- **Optional For Virtual Event** : If you want your virtual attendees to check themselves into the event, send the Not Checked In template text message. This allows them to verify their contact information and check themselves in. **NOTE:** Online and virtual attendees do not need to check-in to an event to participate.

Engage supporters of all levels with the opportunity to participate in raffles, games, voting, and instant purchases.

- Communicate final times that a guest may purchase chances to win via text message for increased sales. Close and/or hide items that are no longer available for purchase.

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- If using the presentation page, promote sales by including button overlays to direct guests to the item of interest.

Capture Live Auction winners.

- Remember to set up “Live” items as Silent Items to allow for visitors to bid on the items themselves. These items can be opened for a designated amount of time and highlighted during the live presentation. Remember to close the item to stop the bidding.
- Track bidding activity on these items via the Live Activity or Backstage pages.

Close your auction according to the expectations you’ve set with guests.

- Plan to manually close and reconcile the auction to account for any changes in program/timing. Auto-close is typically used for online fundraisers with no live component and a known end time.
- Send a warning text up to 30 minutes prior to alert bidders of their final opportunity to bid and specify the auction closing time to avoid any confusion.

Efficiently checkout guests

- Enable Self Checkout in your global settings for guests to easily checkout on their phone with the credit card on file- view Paid receipts from their phone.
- Ensure credit card processing fees have been set to the desired setting. Optional for Purchaser is our recommended setting, however the fees can also be set to Paid by Purchaser or Paid by Organization. It’s important to discuss with your team how to set the fees, since this does impact the user experience.
- Donors with a card on file may not realize they need to complete the checkout process and instead assume that their card will be automatically charged at the conclusion of the event. You can quickly settle remaining balances using the Bulk Run Credit Cards feature- simply set a max threshold for dollar amounts you wish to process.
- Send the Payment Instructions text template to remind guests to check themselves out at the conclusion of the fundraising event.

If you need additional help integrating GiveSmart into your fundraising plan, check out GiveSmart’s service offerings at www.givesmart.com/plans.