Pre Fundraising Guide

Quick Reference Outline for all event types (In-Person, Hybrid or Virtual).

This outline provides links to GiveSmart Help Center resources to help you plan and execute your event.

If you need some extra help integrating GiveSmart into your event plan, check out GiveSmart's service offerings at www.givesmart.com/plans.

Download the Pre Fundraising Guide

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I. Preparing your team

A. Volunteers and organization team members

1. New to GiveSmart? Get started here.
2. Volunteer Profile
3. Add an Admin or Volunteer
4. Volunteer Training

B. Additional GiveSmart Services

1. GiveSmart Services

C. Contracting for on-site staff and equipment

1. On-site Staff
2. Hardware (iPads and Credit Card Swipers)

II. Preparing your GiveSmart Campaign Site

When beginning to build your site, remember to visit the Resources button in the bottom right of your campaign. Located in the Step By Step Guides Section you will find a series of short videos walking you through the setup of your site.

A. All the Settings

1. Site Settings
2. User Settings
3. Auction Settings
4. Donation Settings
5. Communication Settings

1. Checkout a User
2. Self Checkout

F. Reporting

1. Ticketing Reports
2. Registered Users
3. Revenue Report
4. Purchaser Details
5. Batch Report