

# Pre Fundraising Guide

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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](http://www.givesmart.com/plans).

## Download the Pre Fundraising Guide

 [Pre Fundraising Guide](#)

### 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](#)

6. Fees Settings
7. Global Settings

## B. Design and Customize

1. Style and Color
2. Customize the Home Page
3. Create a Presentation Page
4. Create Custom Pages or Custom Order Forms
5. Create Ads and Announcements

## C. Ticketing

1. Create a Ticket
2. Send Assignment or Confirmation Reminders
3. Update Purchaser Order Details
4. Seating Management
5. Purchase a Ticket on Behalf of a Supporter

## D. Fundraising Components

1. Create Items for Purchase - Instant & Vote
2. Create Auction Items - Live & Silent
3. Create Raffle Items
4. Donation Appeal Methods
5. Live Activity or Backstage

## E. Displays (Bids Display & Thermometer)

1. Displays Overview

# III. Fundraising Logistics

## A. Promote Your Fundraiser

1. When and How to Promote

## B. Communications

1. Draft/Schedule Text Messages

## C. Guest Arrival

1. Check-In a Guest
2. Self Check-In

## D. Closing the Auction

1. Schedule Auction Auto Close
2. Manually Close and Reconcile the Auction

## E. Checkout

1. Checkout a User
2. Self Checkout

#### F. Reporting

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