

Online/Virtual Fundraiser Checklist

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Quick Reference Outline for Online/Virtual Events.

This outline provides links to GiveSmart Help Center resources to help you plan and execute your fundraising 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 Online/Virtual Guide

[Online/Virtual Guide](#)

I. Preparing your team

A. Volunteers and organization team members

1. [Add a Campaign Admin](#)

B. Additional GiveSmart Services

1. [GiveSmart Services](#)

II. Preparing your GiveSmart Campaign 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. [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](#) - Embed on Home Page, Presentation Page or incorporate into live presentation

III. Fundraising Logistics

A. Promote Your Fundraiser

1. [When and How to Promote](#)

B. Communications

1. [Draft/Schedule Text Messages](#)
2. [Sample Communication Timeline](#)

C. Guest Arrival

1. [Self Check-In \(Optional\)](#)

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](#)

