Team Fundraising Guide
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Team Fundraising

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Using Team Fundraising, you can generate an interactive web page that drives volunteers, participants, donors, solicitors, and others to your site. Team Fundraising is used to bring awareness and help raise funds for a particular cause that typically centers around an event.

For example, your organization assists the medical field with travels to countries to provide free aid and treatment. You find the medical volunteers, provide training, and raise support for expenses. For the first time, you are hosting a sailing race complete with captains, teams, and team members to benefit this. You want to use your website to generate as much energy and volunteer work and as many donations as possible. Using Team Fundraising, you can designate a fund for the event, allow solicitors to sign up as captains or team members, allow participants to customize web pages for site visitors, and create a donation page for visitors to make contributions. In addition, you can link events to Team Fundraising and generate welcome and forgotten password email.

Design and Management Process

Team Fundraising contains numerous features. When you create this section of your site, you should be prepared to allocate extra time for planning and design. However, after you create and upload Team Fundraising to your website, it becomes a useful tool that generates awareness, new constituents, new donations, and new volunteers.

This flow chart illustrates the design and management process for Team Fundraising.
Team Fundraising: Process Overview

To create a Fundraiser part, you must perform several steps in different areas of the program.

**Step 1:** Designate individuals for your participant, supporter, The Raiser's Edge user, and Blackbaud NetCommunity web designer roles. See Team Fundraising Roles on page 3.

**Step 1:** Designate individuals for your participant, supporter, data entry user, and Blackbaud NetCommunity web designer roles. See Team Fundraising Roles on page 3.

**Step 2:** Plan your fundraiser and educate everyone involved about your plans. During the planning phase, determine the team and level hierarchies for your fundraiser.

**Step 3:** The web designer creates necessary parts, pages, email templates, and notifications needed for the Fundraiser part. For example, if the Fundraiser Page Elements for the Fundraiser do not exist, the web designer creates them. For information about how to create pages and parts, see the Parts Guide. For information about how to create email templates and notifications, see the Email Guide.

**Warning:** In Site explorer, we recommend you do not add more than one Fundraiser part on a page.

**Step 4:** The web designer creates and designs the Fundraiser part. See Design the Fundraiser Part on page 8.
Step 5: Participants (solicitors) or individuals sign up on your website as team captains or team members. See Step 2: Fundraiser Options on page 10.

Step 6: Participants solicit peers via an email appeal. The email includes information about your organization, the fundraiser you are hosting, and a link to the participant’s page on your site. See Step 4: Create Email Designs on page 16.

Step 7: Supporters, people who respond to the participant’s email, visit your website. They learn about your cause and your fundraiser. Supporters often become motivated to participate. A supporter can sign up as team captain of a new team or team member and can make a donation on your site. These people become constituents in your database.

Step 8: A user downloads transactions to The Raiser’s Edge.

First, Sign-ups download to either link the participant to an existing constituent record in the database or a new constituent record is created for the participant.

Next, Fundraiser transactions download to The Raiser’s Edge to store solicitor and team member information.

If the site user signed up for an event, event registrations are then downloaded.

If a solicitor updates the record of an assigned individual, a profile transaction is downloaded.

Lastly, donations are downloaded. For information about how to download transactions to The Raiser’s Edge, see Changes in The Raiser’s Edge on page 44.

Team Fundraising Roles

Individuals in a fundraiser serve these four main roles: participant (or solicitor), supporter, The Raiser’s Edge user, and Blackbaud NetCommunity web designer. Before proceeding with further planning and design, make sure you have individuals to fill these roles.

Participant

The participant is typically a solicitor and can be a team captain or team member. Additionally, the person can join individually (not as a part of a team), join an existing team, or create a team as a captain. Responsibilities include sending email to peers about the cause and fundraiser, directing them to your website, soliciting them for donations, and much more. When you create the Fundraiser part and the participant joins your site, many features appear on your site automatically. The participant has a Home Page dashboard used for monitoring team and individual goals. He can view the number of new donations, send an email acknowledgement for each, view higher level team statistics (if they exist), and view statistics about who made a donation and who opened an email.

Supporter

The supporter is typically contacted by a participant. The contact is made via an email sent from the participant by Blackbaud NetCommunity. The email contains a link to the participant page for each individual to make a contribution. After a contribution is made, you download supporters to The Raiser’s Edge. This creates new constituents in your database. Additionally, supporters can search for and locate existing teams on your site.

The Raiser’s Edge User

The Raiser’s Edge user ensures several pieces of information exist in The Raiser’s Edge before you create a Fundraiser part. The fund the Fundraiser uses must exist. The Raiser’s Edge user can create teams for the Fundraiser on the Solicitors tab in the fund record. Create any constituent attributes to track for new participants and new supporters. For example, you may want to store T-shirt sizes for new participants. To link an event to
the Fundraiser, this event should already exist in The Raiser’s Edge. For example, to invite all donors from the Fundraiser to your Commodore’s Ball, you need an event record in The Raiser’s Edge. Lastly, any Raiser’s Edge reports used to analyze Fundraiser results must be created.

**Blackbaud NetCommunity Web Designer**

The Blackbaud NetCommunity web designer designs and creates the Fundraiser part. He creates additional part types that work with the Fundraiser including Fundraiser Page Elements, Fundraiser Dashboard, and Report (Fundraiser). The designer also creates the email template used by participants for the Fundraiser. Many other decisions and elements are needed for a successful Fundraiser. We recommend that the designer carefully reads and follows Design the Fundraiser Part on page 8.

**Pre-Design Work for Team Fundraising**

Before you create a Fundraiser, several key elements and parts should exist in the program. These elements are used as the web designer creates the Fundraiser part. Before you create the Fundraiser, make sure you have these existing elements and parts for your Fundraiser.

- A web page must exist that can display the Fundraiser part. For information about how to create pages, see the Website Design Guide.

- Fundraiser Page Element part types are used by participants to customize personal web pages on your site. Participants send supporters links to their Fundraiser pages, which are designed for supporters to learn more about your cause and to make donations. Depending on the purpose of the fundraiser, you can create more than one Fundraiser page to offer participants a choice. For example, if your school is hosting a jump rope fundraiser, you can create a Fundraiser page with a boy theme and a page with a girl theme. You can offer a choice of pages to participants. However, a participant can choose only one Fundraiser personal page. Fundraiser Page Elements combine with other parts to create pages that offer dynamic sections (Fundraiser Page Element parts) for participants to customize and static sections (other parts) for your organization to create elements that participants cannot edit. For more information about Fundraiser Page Element and how to create them, see Fundraiser Page Element Parts on page 4.

**Note:** At least one Fundraiser Page Element must exist before you can create a Fundraiser part.

- For a Fundraiser, you must create a welcome email, a forgotten password email, and an acknowledgement email for donations. A new user can register for your Fundraiser and become a registrant of your website at the same time. Therefore, while you can design new email for your Fundraiser as you create it, you might want to design email before. For more information about how to design email messages, see Step 4: Create Email Designs on page 16 and Step 9: Configure Emails on page 32.

**Fundraiser Page Element Parts**

Create Fundraiser Page Elements to add sections to a web page that are dynamic and can be customized for a participant’s (solicitor’s) use. These web pages are personal pages for the participant. Supporters visit the page to learn more about your organization and the participant’s involvement with your organization.

When you create a Fundraiser part, you select one or more possible web pages with Fundraiser Page Elements to include on your site. If you select more than one of these pages, you offer participants a choice of personal
pages. For example, if your school is hosting a jump rope fundraiser, you can create a Fundraiser page with a boy theme and another with a girl theme.

Web pages using Fundraiser Page Elements also contain static sections that are other parts. Use these sections to create defaults to appear on every solicitor’s personal page. For example, you can include your organization’s mission statement on the web page. You can place this part next to a Fundraiser Page Element. If you select the web page when you create a Fundraiser, the part containing the mission appears on every solicitor’s personal page.

Fundraiser Page Element parts can be one of several element types including:

- Action
- Comments
- Donor List
- Photos
- Profile
- Profile (EE)
- Rich Text
- Scrolling Donor Display
- Team List
- Text
- Thermometer

This graphic demonstrates how a web page uses Fundraiser Page Elements and static parts.

For information about how to create specific element types, see the *Parts Guide*.

**Note:** To allow donations from Team Fundraising, we recommend that you create a part or element with a Donate button linking to the donation page. For more information, see Step 7: Donation Form on page 22.
Manage Participant or Solicitor Pages

When you add a Fundraiser part to a page on your website, participants or solicitors can their own web pages. The Home page dashboard provides a central location for them to manage these pages.

The action bar on the Home page dashboard allows participants to navigate between tasks, monitor and update data, edit the Fundraiser page, send email, maintain email contacts, and add and view offline donations, and manage the Fundraiser team.

- **My Home** — To manage the Fundraiser, participants or solicitors can click My Home. From the My Home page, participants can click links to design and visit their web pages, send email, or view and enter offline gifts. Status bars on the page display the progress of the participant and team (and subteam, if one exists). This page also displays statistics about the number of visits a personal Fundraiser page receives, the date of the last visit, the number of email messages a participant sends, and the number of have that are opened.

- **My Activity** — To view statistics about email messages, participants or solicitors click My Activity. To view a list of email messages, participants select “Emails” on the action bar of the My Activity page. For each message, details appear about the number of times it was sent, the recipients, and whether it was opened or forwarded. Participants can sort email messages according to whether they were opened, unopened, forwarded, or delivered unsuccessfully. To view a list of contacts who received email messages and offline donors, participants can select “People” on the action bar. For each contact, details appear about the number of messages received and whether they opened or forwarded messages. For each offline donor, details appear about when and how much they donated. Participants can sort contacts and offline donors according to a variety of criteria, including whether they opened email messages, forwarded email messages, were asked to donate, donated, or were thanked. From the My Activity page, participants can also click View Email to read the original email messages.

- **My Page** — To preview the personal page, participants or solicitors click My Page. In the Friendly URL frame, they create a friendly URL for the personal page. To select a page template, add pictures, edit text, or adjust settings such as the color for a Thermometer page element, participants click Edit My Web Page. Participants manage their personal pages from the My Page page, but team captains can manage the main Team Fundraiser page from the My [Team Name] page.

- **Send Email** — To generate email messages, participants or solicitors click Send Email. Participants can select contacts from the address book or create contacts to add to the address book. After participants select the contacts, a preview screen displays the names, email addresses, and greetings that will be used. From this screen, page owners can change greetings or click contact names or email addresses to change contact information. Participants can select email templates and create the content on the Send Email page. Team captains can also send team email from the My [Team Name] page. Email messages sent from the team captain dashboard do not use an email template and are generated “on the fly” by team captains. These email recipients do not appear when team captains select People on the action bar of the My Activity page, but email statistics for these messages appear when team captains select Emails.

- **Send Thanks** — To generate acknowledgement email messages, participants or solicitors click Send Thanks. A grid displays donors who have not been thanked for contributions to the participant’s Fundraiser page. Participants can change email addresses and greetings in the grid. The changes are saved to the address book. To exclude individuals from an acknowledgement, participants can clear the checkboxes beside the names. To
remove individuals from the list, participants can select the checkboxes in the **Already Thanked** column. Participants can select email templates and create the content on the Send Thanks page. After an acknowledgement is sent, the recipients are removed from the grid.

- **Send Invoices** — When **Support Performance-based Fundraising** is selected on the Step 2: Fundraiser Options screen, participants can raise donations based on per-unit performance such as miles walked in a walk-a-thon. To generate pledge invoices, participants or solicitors click **Send Invoices**. This button appears only when **Activity Closed** and **Pledge Processing** are selected on the Step 2: Fundraiser Options screen and a total is entered in the **My Details** frame on the My Home page. A grid on the Send Invoices page displays donors who made per-unit pledges. Participants can change email addresses and greetings in the grid. The changes are saved to the address book. To exclude individuals from an invoice, participants can clear the checkboxes beside the names. To remove individuals from the list, participants can select the checkboxes in the **Already Collected** column. Participants can select email templates and create the content on the Send Invoices page. After an invoice is sent, the recipients are removed from the grid.

For more information, see Step 2: Fundraiser Options on page 10.

- **Address Book** — To store email addresses and contact information for solicitations, reminders, and acknowledgements, participants or solicitors click **Address Book**. To add contacts, participants click **New Contact**. To use * .csv files to import email addresses from programs such as **Outlook** or **Eudora**, participants click **Import Contacts**. Anyone who joins a team or makes a donation through a participant’s Fundraiser page is also added to the address book. In addition, contact information added on the Send Email, Send Thanks, or Offline Donations pages is saved to the address book. The address book displays up to 10 contacts per page, and the number of contacts and number of pages appear below the grid. The action bar above the grid controls how contacts appear. To display all contacts, participants click **ALL**. If there are more than 10 contacts, participants can use the links below the grid to navigate to additional pages. To view contacts in alphabetic groups, participants click the letters in the action bar. Contacts are organized by last name and by organization name, which means contacts can appear twice and participants can search by last name or organization name. To select a contact, participants select the checkbox beside the name. To select all contacts on a page, participants select the checkbox beside the **Name** column. To select all contacts in the address book, participants select the checkbox beside the **Name** column and then click the link that appears above the grid. To delete a contact, participants select the contact and click **Delete** on the action bar.

**Note:** If a participant of a previous Fundraiser signs up for a Fundraiser, that participant’s address book automatically imports to the new Fundraiser. This includes individuals added manually to the address book and those assigned to the participant (or Class Agent).

When you create a Fundraiser, if you select the **Display Solicitor Assignments** checkbox in Step 2: Fundraiser Options on page 10, the solicitor assignments appear in the address book. Individuals in this list integrate from The Raiser’s Edge Solicitors tab in the fund record. If you show solicitor assignments, the **View** field appears in the address book. Using this field, users can select to view Personal Contacts or Assigned Constituents. When a solicitor (also called a Class Agent for higher education) visits the address book, the latest list of assigned solicitors from the fund record in The Raiser’s Edge updates to the address book.

Solicitors are assigned to constituents in The Raiser’s Edge on the Relationships tab. For information about this process, see The Raiser’s Edge Solicitors chapter in the **Constituent Data Entry Guide**.

**Tip:** You can update the assigned solicitors from The Raiser’s Edge with solicitor address books by synchronizing the fund for the Fundraiser. For more information, see Step 1: The Raiser’s Edge Fund and Administrator Roles on page 8.

- **Offline Donations** — To enter cash or check donations, participants or solicitors click **Offline Donations**. When **Allow Offline Donation Entry** is selected on the Step 2: Fundraiser Options screen, an **Enter Offline Gifts** link appears on the My Home page and an **Enter New Donation** button appears on the Offline Donations page. Offline gifts count toward participant and team goals. A grid on the Offline Donations page displays offline donations. For each donation, details such as donor name, amount, and payment method appear.
Participants can edit or delete donations from the grid, and they can sort according to whether they are pending, accepted, or rejected. When contact information is added on the Offline Donations page, it is saved to the address book. However, when participants change contact information on the Offline Donations page, the address book is not updated.

*Note:* If an offline donation has a status of “Accepted,” participants cannot change it from the Offline Donations page. The “Accepted” status means a user in The Raiser’s Edge downloaded the offline donation. To request a change in The Raiser's Edge, a call must be made to your office.

For more information, see Step 2: Fundraiser Options on page 10 and Offline Donations for a Team Fundraiser on page 37.

- **My [Team Name]** — To manage Fundraiser teams, team captains click **My [Team Name]**. This button displays the participant’s team name. It appears only for participants or solicitors who are designated as team captains. From the My [Team Name] page, team captains can click links to design and visit the main Team Fundraiser page, send email to the team, or add team members. Status bars on the page display the progress of the team (and subteam, if one exists) and team members. The buttons beside the team members allow captains to resend Guest Registration emails or remove team members, but team captains cannot remove members added through an event registration form. The My [Team Name] page also displays statistics about the number of visits the Fundraiser page receives and the date of the last visit.

When **Allow team captains to add new team members via their dashboards** is selected on the Step 2: Fundraiser Options screen, the **Add New [ ] Member** link appears on the My [Team Name] page. This link directs team captains to the Add New Member screen, where they can enter a first name, last name, and email address and click **Add Member**.

If all three fields match an existing member of the Fundraiser, then team captains cannot add the member.

If the name and email address fields match an existing website user who is not a member of the Fundraiser, then the new member is linked to the user record. The Guest Registration email takes the user directly to the Participant Login page instead of the New User Login page.

## Design the Fundraiser Part

Team Fundraising requires the creation of several pieces from the program before you can create a Fundraiser, and it is important to understand all of the information leading up to this section.

**Warning:** We strongly recommend that you read Team Fundraising: Process Overview on page 2 before you design the Fundraiser part.

The following procedures explain each step of the Team Fundraiser creation process.

- **Step 1: The Raiser’s Edge Fund and Administrator Roles**
  1. From **Site explorer**, click **Parts**. **Parts** appears.
  2. To edit an existing part, click **Click here to edit this part** under **Action**. The Edit Part screen appears displaying the Design tab. The first section displays “Step 1.” There are a total of nine steps in a Fundraiser part.

    For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see the **Parts Guide**.
3. In **The Raiser’s Edge Fund** field, click **Select** to select The Raiser’s Edge fund to credit donations for this Fundraiser. The Fund Search screen appears. The **Goal, Start Date, End Date, and Category** fields default from the fund record.

   **Note:** After an individual signs up as a participant or a donation is received, you can no longer change The Raiser’s Edge fund in **The Raiser’s Edge Fund** field.

4. To synchronize the Fundraiser with data from The Raiser's Edge, select **Use Fundraiser Synchronize schedule**. The website updates data based on the schedule that you set on the Settings tab in **Sites & settings**. For more information, see the Administration Guide.

   If you plan to include assigned solicitors (see Step 2: Fundraiser Options on page 10) in your Fundraiser, you may need to periodically re-synchronize the fund you select in this step. Clicking **Synchronize Now** updates any changes made on the Solicitors tab in the fund record. This updates the list of assigned solicitors in the Address Book. A solicitor (or Class Agent) updates the list when he or she visits the Address Book. For more information, see the Address Book section in Manage Participant or Solicitor Pages on page 6.

   For more information about Raiser’s Edge funds, see The Raiser’s Edge **Campaigns, Funds, & Appeals Data Entry Guide**.

   You can edit the online data on a gift record in The Raiser's Edge for a gift originally from Blackbaud NetCommunity. You can edit the gift amount, gift date, comments, and solicitor information from Blackbaud NetCommunity. When you synchronize the Fundraiser, changes made to the data in The Raiser’s Edge appear in Blackbaud NetCommunity. If you edit solicitor information, you cannot distribute the gift to multiple solicitors. The gift can have only one solicitor.

   **Warning:** To avoid duplicate data, you must click **Synchronize Now** before you edit online gift data in The Raiser’s Edge.
5. In the Administrator Roles frame, select the checkbox for each role that needs Administrator rights for participant dashboards. Users with Administrator rights can edit participant dashboards. To do this, a user with Supervisor rights must send the web page URL link from the user record (in Users) to the Administrator. The Administrator (or Supervisor) clicks the link to access the dashboard and make the necessary modifications.

For information about the participant dashboard, see Manage Participant or Solicitor Pages on page 6. For information about roles and users, see the Users & Security Guide.

> Step 2: Fundraiser Options

When completing Step 2, it is important to read Create Team Hierarchy in a Fundraiser Part on page 34.

1. On the Fundraiser options screen, you define join options for individuals and teams.

   ![Step 2: Fundraiser Options](image)

2. To create hierarchical teams with multiple levels for the Fundraiser, click Add Level in the Team Levels frame. A grid appears so you can create team levels.

   a. In the Display Name column, enter the name of the team. For example, enter “Corporate Sponsor.”

   b. To allow site users to join the level, select Allow Join. You must select at least one Allow Join checkbox in your existing rows.

      The program does not support solicitors reporting to solicitors.

   c. To allow site users to create a team on this level, select Allow Create.

      It is important to understand that unless you select Allow Create in the top row, you are permitting participants the right to create a team that is a sublevel of the previous row. For information about team hierarchy in Team Fundraising, see Create Team Hierarchy in a Fundraiser Part on page 34.

   d. In the Max Participants column, enter the maximum number of participants for the team. If there is no maximum number, leave the field blank.

      If the maximum number of participants is met, the Join button is disabled for website users on the Team Fundraiser search page. In addition, the team does not appear in the Create team under field when a participant selects Create a new team. Also, if the maximum number of participants is met, the Add New [ ] Member link is disabled for participants on the team captain dashboard.

      If the maximum number of participants is met, you can still add participants on the Solicitors tab on The Raiser’s Edge fund record to increase the number of participants for a team. To update Blackbaud NetCommunity, synchronize The Raiser’s Edge and the Fundraiser. For information about synchronizing data, see Step 1: The Raiser’s Edge Fund and Administrator Roles on page 8.

   e. To remove the level from your site, click Remove in the Action column.

   f. Repeat steps a. through e. to add more team levels. Each new level represents a sublevel of the previous team level. You can add up to 10 team levels. For more information about team hierarchy in Team Fundraising, see Create Team Hierarchy in a Fundraiser Part on page 34.

3. To allow site users to join as individuals, select Allow Join as Individual. This allows the user to participate in your organization’s fundraiser without being a member of a team.
4. To allow participants to create unique teams that do not follow the team hierarchy defined in the **Team Levels** frame, select **Allow Independent Teams**. When you select this checkbox, participants can also create sublevel teams not defined in the **Team Levels** frame.

5. In the **Minimum Goal** field, enter the minimum amount a solicitor must raise for your cause.

6. In the **Suggested Goal** field, enter the goal for solicitors to raise for your cause. Suggested goal amounts add up to the total team goal amount. When a participant joins the Team Fundraiser, the **Suggested Goal** amount defaults in the **Individual Goal** field on the signup web page.

7. In the **Constituent Code** field, select a constituent code to add for anyone not already in your database who joins. Your website users do not view this information. For information about constituent codes, see the **Program Basics Guide**.

8. To display a progress status bar for the user to view during the Team Fundraiser registration, select **Display Progress Indicator**. If the Fundraiser part does not include an event, a three-step progress bar appears at the top of each Team Fundraiser for the website user.

Review the following information for registration details.

a. Step 1: Register — This is the registration page. If you select **Require Waiver**, waiver information is included on this page. If the user is a member of your website, this page does not appear.

b. Step 2: Join Options — The individual goal amount for a participant appears at the top of the second page. The amount defaults from the **Suggested Goal** field. Join options also appear. For example, **Create a new team** appears.

c. Step 3: My Dashboard — After the user completes the first two registration steps, the participant dashboard page appears. For information about this page, see **Manage Participant or Solicitor Pages** on page 6.

If the Fundraiser part includes an event, a seven-step progress bar appears at the top of each Team Fundraiser for the website user. For information about including events for the Fundraiser, see **Step 8: Create Links to one or more Events** on page 29.

Review the following information for registration details.

a. Step 1: Register — This is the registration page. If you select **Require Waiver**, waiver information is included on this page. If the user is a member of your website, this page does not appear.
b. Step 2: Join Options — The individual goal amount for a participant appears at the top of the second page. The amount defaults from the Suggested Goal field. Join options also appear. For example, Create a new team appears.

c. Step 3: Event Options — If you include an event in this Fundraiser part, the Event Options page appears. If you select Exclude the first Event Info/Selection page from registration for the event, one Step 3: Event Options page appears. If you do not select the checkbox, two Step 3: Event Options pages appear. For more information, see Step 8: Create Links to one or more Events on page 29.

d. Step 4: [Participants/Unit Label] — This page includes event details for the website user and any additional event registrants. For example, if included for the event, the user can view price information. In addition, the user selects event attributes on this page. The name you enter in the Participants/Unit Label field appears on the page in the progress indicator. It also appears as the page header name. For more information, see Step 8: Create Links to one or more Events on page 29.

e. Step 5: Payment — This page includes Billing Information and Payment Information for a user to submit. If the event is free, the Payment Information section does not appear on the page.

f. Step 6: Confirmation — A summary of the user’s billing and payment information appears on this page.

g. Step 7: My Dashboard — After the user views the Step 6: Confirmation page, the participant dashboard page appears. For information about this page, see Manage Participant or Solicitor Pages on page 6.

9. In the Participant Settings frame, to prevent participants from editing their individual goal on the Fundraiser Dashboard, do not select Editable Goal. Selecting this checkbox permits participants to change their goal on the dashboard.

<table>
<thead>
<tr>
<th>Participant Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Editable Goal: ☑</td>
</tr>
<tr>
<td>Allow Offline Donation Entry: ☑</td>
</tr>
</tbody>
</table>

10. To allow a participant to enter offline donations on the participant dashboard, select Allow Offline Donation Entry. An Enter Offline Gifts link appears on the participant dashboard. The participant clicks the link to enter a cash or check donation. If you do not select this checkbox, a View Offline Gifts link appears on the participant dashboard.

Note: For information about offline donations and The Raiser's Edge, see Offline Donations for a Team Fundraiser on page 37.

11. In the Add New Member Settings frame, to include an Add New [ ] Member link on the team captain dashboard, select Allow team captains to add new team members via their dashboards. This allows a team captain to add team members on the team captain dashboard. For more information, see Manage Participant or Solicitor Pages on page 6.

Add New Member Settings
If the Max Participants limit has not been met for a given team, the following settings will permit new team members to be added:

- Allow team captains to add new team members via their dashboards
- Add non-anonymous attendees to registrant’s team during event registration
To include guest registrants as team members, select **Add non-anonymous attendees to registrant’s team during event registration**. For example, Lynn Adamson registers for Team Blue. When she registers, she includes her husband and son as guest registrants. If you select this checkbox, her husband and son also become Team Blue members.

12. To include a waiver solicitors must agree to before participating, select **Require Waiver**.

   ![Check box for Require Waiver]

   a. In the **Title** field, enter a title for the waiver section on the web page.

   b. In the **Agree Caption** field, enter the text for the waiver acceptance checkbox. For example, enter “I agree to the waiver policies.”

   c. In the **Statement** box, enter your organization’s waiver information.

13. To raise donations based on participant performance, select **Support Performance-based Fundraising**. For example, if your Fundraiser is based on raising $1 for every mile a participant walks, select this checkbox.

   ![Check box for Support Performance-based Fundraising]

   If the **Support Performance-based Fundraising** checkbox is disabled for an existing Fundraiser part, a performance-based donation already exists for that Fundraiser.

   a. In the **Unit Name** field, enter a name for the measure to rate performance. For example, you can enter “Miles Walked” for a walk-a-thon.

   b. When the fundraiser is over, select **Activity Closed** to prevent participants from updating final performance-based values.

   c. To download pledges based on performance, select **Pledge Processing**.

   For more information about how download donations, see the Blackbaud NetCommunity and The Raiser’s Edge Integration Guide.

14. To provide solicitors with the ability to update profiles for constituents in The Raiser’s Edge, select **Display Solicitor Assignments**. When a solicitor updates a profile on the Fundraiser, the transaction is processed as a profile transaction. For more information, see the **Parts Guide**.
a. In the **Type of Profile** field, select the type of constituents who use the profile form. You can select **Individual** or **Organization**.

b. If you select **Organization**, the **Message to display when there are no organization records** box appears. In the box, enter the message to appear when website users who navigate to a page with the profile form part do not have an organization record or are not a relationship type with **Edit Org Profile** selected on the Settings tab in Sites & settings. For example, enter “There are no organizations associated with your record.”

c. In the **Section** field, select the type of profile design to create. You can select “Bio,” “Preferred Address,” “Business,” “Phones and Email,” “Spouse,” “Constituent Attributes,” “Primary Alumni,” and “Education Attributes.”

Each **Section** field option includes fields from the corresponding area in The Raiser’s Edge. For example, if you select “Spouse,” spouse fields from The Raiser’s Edge appear. When a user enters spouse information on your website, you can download the information directly to the spouse fields in The Raiser’s Edge.

If you select “Constituent Attributes,” the constituent attributes that appear on your User Profile Form can have multiple values. For example, if your constituent attribute is “Mentor,” a **Mentor** field appears with a drop-down arrow on the profile form on your website. The values from the list are the table entries set up for the attribute in The Raiser’s Edge. For Mentor, the values could be “Algebra,” “Painting,” or “Construction.”

For constituent attributes to have multiple table entries on the profile form on your website, you
must first make them accessible from The Raiser's Edge. To do this, in Blackbaud NetCommunity, select the Settings tab in Sites & settings. For more information, see the Administration Guide.

d. In the Heading field, enter the text to appear at the top of your profile design. For example, enter “My Biographical Page” for your biographical profile.

e. Select the checkboxes in the grid to include on your profile design.

15. To display a giving history for your solicitor, select Display Giving History.

The Fundraiser giving history can include soft credits.

a. In the List Name field, enter the name for the giving history list for your website.

b. In the Message box, enter the message to appear below the giving history name on your site.

c. In the Filtering Options frame, click Modify to select the filters for your giving history. You can narrow your results by Gift Types, Campaigns, Funds, and Appeals.

d. To include soft credit gifts in the giving history, select Include Soft Credits.

e. In the Descriptive Text field, enter the text to indicate a soft credit gift in your giving history. For example, enter “soft credit.”

16. In the Notifications frame, to create a notification for a solicitor, click Create New Notification. You can use the default text provided or enter different text. For information about how to create a notification, see the Email Guide.

Note: A solicitor can select to receive notifications when he receives a new donation. A solicitor can also select to receive notifications when his team receives a new donation or a new participant signs up for the team.

a. To edit an existing notification, select the notification and click Edit in the Action column.

b. To prevent solicitors from receiving a notification, select the checkbox in the Active for this Part column for the notification.
Step 3: Select Pages for use as Participant and Team Pages

You must create at least one web page in Site explorer that contains a Fundraiser Page Element part before you can make selections on this screen. For more information about the Fundraiser Page Element part, see Pre-Design Work for Team Fundraising on page 4.

1. In the Page column, select a web page from the drop-down list. Only pages that contain Fundraiser Page Elements appear in the list. If no pages appear, you must create them in Site explorer.

   ![Step 3: Select Pages for use as Participant and Team Pages](image)

   **Note:** Fundraiser Page Elements are sections for participants to customize. Participants send supporters email messages to direct them to the pages, which are designed for supporters to learn about your cause and make donations. Because you offer a choice for personal web page designs to participants, a participant can choose only one Fundraiser personal page. Pages that use Fundraiser Page Elements contain dynamic sections for participants to customize and static sections for your organization to create sections that participants cannot edit. For more information about the Fundraiser Page Element part, see Fundraiser Page Element Parts on page 4.

2. In the Display Name column, enter a page reference name for solicitors to easily identify. This name does not appear on your site for public viewing. The name appears as an option for solicitors to select their Fundraiser personal pages. For example, enter “Blue” in the Display Name column for one page, and “Pink” for a second page. When a solicitor edits the page, these two page options appear.

3. In the Page Type column, select “Solicitor,” “Team,” or “Both” to define who can use the page.

4. If this is the default personal web page, select the checkbox in the Default column. Each Fundraiser part must have a default page.

5. To remove the page from your Fundraiser, click Remove in the Action column.

6. Click Add Page to add a row to the grid and add a web page. Depending on the purpose of your Fundraiser, you may add more than one page to offer participants a choice. For example, if your school is hosting a jump rope fundraiser, you can create a page with a boy theme and a page with a girl theme.

Step 4: Create Email Designs

1. In the Email Designs frame, click Add Email to create email designs for participants or team members to use to send personal appeal, acknowledgement, and guest registration email.

   ![Step 4: Create Email Designs](image)

The new email screen appears.
2. In the Name field, enter a name for the email template.

   The program uses the personal page owner’s email address in the From Address field and the owner’s name in the Name field.

3. In the box, enter the content of the email template. To customize email content, select fields from the Merge Fields drop-down field.

   - To direct recipients to the donation page, from the Merge Fields drop-down field select the Sender Fields, Donation Page Hyperlink merge field for the Appeal/Thank You, Appeal, or Thank You email template.

   - To direct recipients to the Team Fundraiser registration page, from the Merge Fields drop-down field select the Sender Fields, Registration Page Hyperlink for the Guest Registration email template.

   - To direct recipients to the pledge payment page, from the Merge Fields drop-down field select the Special Fields, Pledge Payment Link for the Invoice email template.

4. To format the email content’s appearance and layout, use the HTML editor. For information about the HTML editor, see the Program Basics Guide.

5. To save the email template and return to Step 4: Create Email Designs screen, click Save and Close.

6. A grid appears on the screen with the new email template in the Display Name column. In the Type column, select the email type for the new template.

   - Appeal/Thank You — To combine the appeal and acknowledgement content in one email, select Appeal/Thank You. For example, the email can read “Welcome to my Walk-a-Thon page! Please visit my page to join my team and make a donation to a great cause! Thank you for your participation.”

   A member receives this email when upon joining a team.

**Warning:** The Appeal and Thank You email templates are required for the Fundraiser part. To create one email template for both types, select Appeal/Thank You. To create an individual email for both types, create two email templates. Select Appeal for the appeal email template and Thank You for the acknowledgement email template.
• Appeal — To allow a participant to send a personal appeal email without acknowledgement information, select Appeal. Email content for this template type may only contain “Welcome” or “Please visit my page” information.

• Thank You — To allow a participant to send an acknowledgement email after someone makes a donation for his team, select Thank You. Email content for this template type may only contain acknowledgement information.

• Invoice — To allow a participant to send pledge invoices, select Invoice. Email content for this template type should include a link to the pledge payment page.

**Warning:** The Invoice email template is only available for the Fundraiser part when **Support Performance-based Fundraising** is selected on the Step 2: Fundraiser Options screen.

• Guest Registration — This email template is used when a participant adds a new member for the team on the participant dashboard.

**Warning:** The Guest Registration email template is required for the Fundraiser part. You cannot create more than one Guest Registration email template.

When a participant clicks the **Add New [ ] Member** link on the participant dashboard, the Add New Member screen appears. The participant completes the screen and clicks the **Add Member** button. The new member then receives an email using this template. For more information, see Manage Participant or Solicitor Pages on page 6.

The Guest Registration template is also used if the **Automatically add guest participants to team during event registration** checkbox is selected and a registrant includes guest registrants. For more information, see Step 2: Fundraiser Options on page 10.

► **Step 5: Search Page Form Options**

1. On this screen, you can define the search form title.
   
   Site visitors use the search form to search for a participant page. In addition, site visitors can view team members and join a team on this form.

2. Under **Search Page Form Options**, in the **Title** field, enter the name of your site search screen. If you do not enter a name, “Search for Participants” appears as the title for your site search screen.

► **Step 6: User Login Form**

In this procedure, you create a login for your Fundraiser. These login steps are very similar to creating a User Login part. However, the Fundraiser login remains a feature of the Fundraiser part. To edit this login, edit the Fundraiser part.

1. When you configure social media for third-party authentication with social networks such as Facebook and Twitter, **Social website login** appears with the **Enable social website login** checkbox. To enable social media options for the login, select the checkbox. Additional options appear.
### Social website login

<table>
<thead>
<tr>
<th>Enable social website login</th>
<th>Mark this field to display the social site icons on the login page.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign in text:</td>
<td>Enter the text to display for the sign in text field. For example, instructions to help supporters sign in with the credentials they provided when they registered for the event.</td>
</tr>
<tr>
<td>Use an existing login:</td>
<td></td>
</tr>
<tr>
<td>Social website sign in text:</td>
<td>Enter the text to display for the social media sign in text field. For example, instructions to help supporters sign in with a social site login where they have an account.</td>
</tr>
<tr>
<td>Use your login from:</td>
<td></td>
</tr>
<tr>
<td>Display options:</td>
<td>Select how to arrange the social site icons relative to the login fields.</td>
</tr>
<tr>
<td>Left</td>
<td></td>
</tr>
<tr>
<td>Right</td>
<td></td>
</tr>
<tr>
<td>Above</td>
<td></td>
</tr>
<tr>
<td>Below</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** For more information about social media for third-party authentication, see the Administration Guide.

2. In the Captions and Properties frame, enter a title for the user login form and text for the hyperlink that directs users to the login form. To include forms for new registrations, forgotten passwords, forgotten user IDs, and join options, enter a title in the Form Title column and a name in the Hyperlink column, and select Enabled.

Login and Join Options are required for a Team Fundraiser. Therefore, you cannot clear Enable in these rows.
**Note:** If a user registers for the first time using the Fundraiser login, the user is registered for your entire Blackbaud NetCommunity site at the same time. Also, when a user logs into your Fundraiser, the user is logged into your website.

We recommend that you disable new registrations only if you import Raiser’s Edge constituents into Blackbaud NetCommunity. Imported users are registered automatically so they do not need to register a second time via the User Login part.

We recommend that you disable new registrations only if you import Blackbaud Student Information System records into Blackbaud NetCommunity. Imported users are registered automatically so they do not need to register a second time via the User Login part. You cannot use the NetCommunity plug-in to download new users to Blackbaud Student Information System. You can download new users to only The Raiser’s Edge. Therefore, use this checkbox to prevent Blackbaud Student Information System applicants, students, parents, and alumni from signing up as new registrants.

If you disable new registrations, the **Add New [ ] Member** link not available for the team captain dashboard. For more information about the link, see Step 2: Fundraiser Options on page 10.

**Note:** If you need to edit your Fundraiser login, make sure to edit the Fundraiser part. Fundraiser logins are not located in a User Login part.

3. In the **Constituent Code** field, select the constituent code to assign to users who use this form to sign up on your website. For information about constituent codes, see the *Program Basics Guide*.

4. In the **Additional Fields** frame, select the biographical information fields to include on the new user registration form.
a. In the Additional Fields grid, select the checkbox in the Include column for each field to appear on the form. To make the fields required, select the checkboxes in the Required column. When you select Include for the Address block field, it is automatically required.

b. To include attribute fields on your registration form, select the checkbox in the Include column for each attribute field to appear on the form. To make the attributes required, select the checkboxes in the Required column.

Note: If you know an attribute exists in The Raiser's Edge but do not see it, check the Settings tab in Sites & settings to make sure the attribute is available in Blackbaud NetCommunity.

These are constituent attributes pulled from The Raiser's Edge. If you need a new attribute for your part, create it in The Raiser's Edge. For example, you can use a constituent attribute to track T-shirt sizes for participants. To record this information, create a T-shirt size attribute. For information about attributes, see The Raiser’s Edge Configuration & Security Guide.

Note: When you download sign-up transactions for provisional users using the NetCommunity page in The Raiser's Edge, data from Additional Fields are not available in the sign-up transaction. After the sign-up transaction has processed to The Raiser's Edge, data from these fields are available in the User Profile Updates transactions. Current users joining the Fundraiser who are logged into the site already (via another User Login part), are prompted to complete any fields selected as Include. Any roles assigned to your Fundraiser are merged with the existing roles assigned to the user.

5. In the Role Assignment frame, select the checkbox in the Member column for roles to assign users who sign up through the Fundraiser part.
In this step, you assign roles for new users of your site who have not yet been approved using the NetCommunity page. Select these roles to target content specifically for unapproved users.

For more information about security, see the Users & Security Guide.

Step 7: Donation Form

On this screen, you can define options for online donations given through a Fundraiser part. If you plan to allow donations from a Fundraiser, we recommend that you create a part or element with a Donate button that links to the donation page. After you create a Fundraiser part and add it to a web page, a web page named “[Fundraiser Part Title] — Donate” is generated automatically using the settings you define on this screen. After you create the part, you must update the Donate button link so it directs users to the “[Fundraiser Part Title] — Donate” page.

1. From the General section, you can specify a constituent code to apply to new and existing constituents who use this part to contribute and select the minimum amount the donor can enter.

- In the Constituent Code field, select a constituent code to assign to donors in The Raiser's Edge database.

  For more information about constituent codes, see the Constituent Codes section of the Program Basics Guide.

- In the Minimum Gift Amount field, enter the minimum donation a donor can contribute. Enter “0” or leave this field blank to allow donors to contribute any gift amount.
2. To allow donors to contribute a single gift and pay the total amount at the time of the donation, select **Allow one-time gifts** under Donor Gift Scheduling Options. A **One time gift** option appears under **Type of gift** on the donation form.

3. To allow donors to contribute regular recurring gifts, under Donor Gift Scheduling Options, select **Allow recurring gifts**. A **Recurring gift** option appears under **Type of gift** on the donation form. When a donor selects **Recurring gift**, **Frequency** options appear.

To allow the donor to determine the frequency of the recurring gift on the donation form, select **General**. Donors can select to make a contribution every week, month, quarter, or year.

**Tip:** If a constituent donates a recurring gift and selects a start date that is not today’s date, the transaction downloads to The Raiser’s Edge. However, the transaction is not sent to your bank merchant when the donor submits the recurring gift. The merchant receives the transaction from the batch output you send to your bank for processing from The Raiser’s Edge. For more information about bank merchants, see the Administration Guide.

To define the recurring gift schedules donors can choose, select **Specific**.

a. Select “Weekly,” “Monthly,” “Quarterly,” or “Annually” as the frequency.

b. In the **On** field, select a day or date donors can choose to schedule the gift.

c. To add the frequency to the donation page, click **Add Frequency**.

   To add multiple frequency options to the donation form, enter each custom schedule and click **Add Frequency** to add the new schedule to the list. The selections you make appear in the **Frequency** grid on the Donation Form part.

d. Select **Allow donor to enter ending date**, if donors can specify when the recurring gift ends.

4. To allow donors to create a pledge and define a pledge installment schedule, select **Allow pledge installment gifts** under Donor Gift Scheduling Options. A **Pledge (installments)** option appears under **Type of gift** on the donation form. When a donor selects **Pledge (installments)**, a **Number of Installments** field and frequency options appear on the donation form.

**Note:** Donors may enter up to “200” in the **Number of Installments** field.

To allow the donor to determine the frequency of the pledge payments on the donation form, select **General**. Donors can select to make payments in weekly, monthly, quarterly, or yearly installments.

To define the pledge installment schedules donors can choose, select **Specific**.

a. Select “Weekly,” “Monthly,” “Quarterly,” or “Annually” as the frequency.

b. In the **On** field, select a day or date donors can choose to schedule the installments.

   To add multiple frequency options to the donation form, enter each custom schedule and click **Add Frequency** to add the new schedule to the list. The selections you make appear in the **Frequency** grid on the Donation Form part.

c. In the **Minimum Installment Amount** field, enter the minimum amount a donor can select to pay for each installment. For example, if you enter “10,” in this field, when a donor selects a pledge installment schedule, each pledge payment must be at least ten dollars.

**Note:** If the number of installments for the pledge does not result in equal payment amounts, the final scheduled payment contains the remainder. For example, a $100 pledge with three installments has two payments of $33.33 and a final payment of $33.34.
Note: The program calculates the installment amount and end date based on the number of installments, frequency, and date the donor specifies, and it displays this information on the donation page. For example, a donor may contribute $100 in four monthly installments and select to pay each installment on the first day of the month beginning Jan. 1. This generates four scheduled payments of $25 ending April 1. No installment payments occur after the end date.

Note: You can enter a minimum installment amount to prevent donors from making small payments over a long period of time. For example, if you do not enter a minimum amount, a donor may pledge twenty dollars and choose to pay one dollar each month for twenty months.

5. Under Donor Options, select the options to make available to donors.

Donor Options
Select which options to make available to donors on this Donation Form.
- [ ] Allow corporate gifts
- [ ] Allow anonymous gifts
- [ ] Allow comments
- [ ] Allow matching gifts
- [ ] Allow tribute gifts

a. To allow a company to donate, select Allow corporate gifts. When you select this checkbox, This donation is on behalf of a company appears on the donation form.

b. To allow donors to give anonymously, select Allow anonymous gifts. When you select this, I prefer to make this donation anonymously appears on the donation form.

c. To allow donors to enter comments on the donation form, select Allow comments.

d. To allow donors to provide matching gift company information, select Allow matching gifts. When you select this checkbox, My company will match my gift appears on the donation form. Donors can select the checkbox and enter the company name in the Company field. If you use MatchFinder Online, Look it up appears next to the checkbox. Visitors click the link to access MatchFinder Online and search for the company. MatchFinder Online contains information about matching gift companies, such as the minimum and maximum gift details and match ratio.

Data from MatchFinder Online integrates with The Raiser’s Edge. For information about MatchFinder Online purchasing options, send an email to solutions@blackbaud.com.

For information about how to download matching gift information to The Raiser’s Edge, see the “Download donations - single transaction process” procedure in the Blackbaud NetCommunity & The Raiser’s Edge Integration Guide.

For information about matching gifts in The Raiser’s Edge, see The Raiser’s Edge Gift Records Guide.

6. To create a tribute section on the donation form, select Allow tribute gifts.
**Note:** If you use Honor/Memorial Tracking in The Raiser’s Edge, select the *Allow tribute gifts* checkbox.

a. To allow the donor to enter the tribute information, select **General**.

   Select the checkbox for each tribute type to include in the tribute section. The tribute types listed are entries from the [Tribute Types](https://www.theraisersedge.com) table in The Raiser’s Edge.

b. To have all tributes from the donation form go to a specific tribute, select **Specific**. When you select this, Honor/Memorial appears with a **Tribute** field.

   To select an honor or memorial individual from The Raiser’s Edge, click **Honor/Memorial**. A search screen appears so you can search for the individual.

   In the **Tribute** field, select the tribute type and description to use. Information in this field is from the Honor/Memorial tab in The Raiser’s Edge. The selections are a combination of the data from the **Tribute type** and **Description** fields.

c. To remove the **Description** field from the **Tribute** section on the donation form, select **Hide tribute description** field.

   If you select **Hide tribute description**, in the **Tribute Introductory Text** field, you can enter the text to appear at the beginning of the **Tribute** section on your donation form, such as “This gift is made in honor of someone special.”

d. If you select **General** so users can enter tributes themselves, you can select **Display tribute name fields as two fields (first/last name)** to improve data entry. When you select this checkbox, the **Tribute** section of the donation form displays **First name** and **Last name** fields, so donors can enter specific information.
e. Select **Display acknowledgee name fields as two fields (first/last name)** to create separate name fields for the acknowledgee. When a donor selects **Mail a letter on my behalf** on the donation form, the **First name** and **Last name** fields appear, so the donor can enter a specific acknowledgee.

**Note:** If you do not select **Display tribute name fields as two fields (first/last name)**, the **Full name** field appears in the **Tribute** section of the donation form.

**Note:** If you do not select **Display acknowledgee name fields as two fields (first/last name)**, the **Full name** field appears on the donation form when a donor selects **Mail a letter on my behalf** automatically appears on the page. When a donor selects this checkbox, name and address fields appear for the donor to enter information for use in a tribute letter.

7. To select a giving level for your donors, click **Add Giving Level** under **Giving Levels**.

### Giving Levels

You may set up suggested giving levels for this Donation Form. Click **Add Giving Level** to add a new level. Then, enter the **Display Name** and its corresponding gift **Amount**. If this Fundraiser leverages Performance-based giving, optionally set **Per Unit** on the **Giving Level**.

<table>
<thead>
<tr>
<th>Display Name</th>
<th>Amount ($)</th>
<th>Per Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gold Sponsor</td>
<td>$50.00</td>
<td></td>
</tr>
<tr>
<td>Platinum Sponsor</td>
<td>$150.00</td>
<td></td>
</tr>
<tr>
<td>Gold Mile Sponsor</td>
<td>$5.00</td>
<td></td>
</tr>
<tr>
<td>Platinum Mile Sponsor</td>
<td>$15.00</td>
<td></td>
</tr>
</tbody>
</table>

For each giving level, you can specify how much a user must donate in order to reach that level. You can base the giving level on a specific gift amount. For example, to reach “Gold” status, a user must give at least $5,000. Or, if you select **Support Performance-based Fundraising** in Step 2, you can specify the gift amount associated with a unit. For example, if you host a walk-a-thon, you can create a “Gold Mile Sponsor” giving level for $20. When a user selects to donate $20 for each mile a participant walks, the user achieves the Gold Mile Sponsor level.

a. In the **Display Name** field, enter the name of the giving level as it will appear on the website.

b. In the **Amount** field, enter the gift amount for the giving level.

c. Select **Per Unit** to indicate the amount applies to the unit of measurement, such as miles or laps, you entered in the **Unit Name** field in Step 2.

d. To include a blank **$Other** field on the Donation page, select **Allow other amount**.

**Note:** If you select to raise donations based on participant performance, you can associate giving level amounts with units. For more information, see **Step 2: Fundraiser Options** on page 10.

8. To select an appeal for the gift, click **Add source** under **Sources**. With this information, your organization can manage how donors learn about donating through the website.
a. To include an appeal, click Add Appeal in the Appeal column. The Appeal Search screen appears so you can select an appeal.

Tip: When you select source information, a How did you hear about our site field appears on the donation page. In this field, users can select from the appeals you select in this step.

b. In the Display Name field, enter the name of the appeal as it will appear on the website. By default, the text entered in the Appeal Name field on the appeal record in The Raiser's Edge defaults in the Display Name field.

c. In the Default column, select the checkbox for the appeal to use when the user does not select an appeal.

d. To hide an appeal from the How did you hear about our site field, clear the checkbox for the appeal in the Display column.

If you choose to not display an appeal, you can add source information to the end of a system generated URL in an email that navigates the recipient to your donation page. For example, create a link to your donation page in an email message. At the end of the generated URL, add &source=camp. When the recipient clicks the link, the How did you hear about our site field does not appear on the page. The appeal stores automatically based on the source information in the URL.

Warning: To track source information this way, you must use a system generated URL. You cannot use unique URLs or friendly URLs created by a user.

The source information must include the appeal ID from The Raiser's Edge. For example, if the appeal ID in The Raiser's Edge is Annual2008, add &source=Annual2008 to the end of the generated URL. If the appeal ID includes a space, replace the space with a %20. For example, if the appeal ID is CAMP LETTER add &source=CAMP%20LETTER.

If you select the Display checkbox for the appeal and a user navigates to the donation page via a URL without source information, the How did you hear about our site field appears on the page.

e. To require users to select a source, select Source is a required field. If you select this checkbox, you must select the Display checkbox for at least one appeal.

To add additional appeals, click Add source. Another row appears in the grid for you to select another appeal.

9. Under Required Fields, select the checkbox for each donor field to require on the donation form. To ensure you download complete constituent information into The Raiser's Edge, we recommend that you make all these fields required.
10. Under **Attributes**, select gift attributes to associate with the donation page.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Display</th>
<th>Required</th>
<th>Caption</th>
</tr>
</thead>
<tbody>
<tr>
<td>NetCommunity Email Source</td>
<td>✔️</td>
<td>❌</td>
<td>NetCommunity Email Source</td>
</tr>
<tr>
<td>Auction ID</td>
<td>❌</td>
<td>❌</td>
<td>Auction ID</td>
</tr>
<tr>
<td>Item Number</td>
<td>❌</td>
<td>❌</td>
<td>Item Number</td>
</tr>
<tr>
<td>Sold On</td>
<td>❌</td>
<td>❌</td>
<td>Sold On</td>
</tr>
<tr>
<td>Declared Value</td>
<td>❌</td>
<td>❌</td>
<td>Declared Value</td>
</tr>
<tr>
<td>Named Giving Opp</td>
<td>✔️</td>
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<td>Named Giving Opp</td>
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<tr>
<td>Donor Designation</td>
<td>❌</td>
<td>❌</td>
<td>Donor Designation</td>
</tr>
<tr>
<td>Check routing</td>
<td>❌</td>
<td>❌</td>
<td>Check routing</td>
</tr>
<tr>
<td>Gift transfer date</td>
<td>❌</td>
<td>❌</td>
<td>Gift transfer date</td>
</tr>
<tr>
<td>Gift-in-Kind Type</td>
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<td>Gift-in-Kind Type</td>
</tr>
<tr>
<td>Source</td>
<td>✔️</td>
<td>❌</td>
<td>Source</td>
</tr>
<tr>
<td>Adopt An Animal</td>
<td>❌</td>
<td>❌</td>
<td>Adopt An Animal</td>
</tr>
</tbody>
</table>

**Tip:** The gift attributes that appear are created in The Raiser's Edge. After you process a donation transaction, the attributes you select appear on the Attributes tab of a gift record.

11. In the **Display** column, select the checkbox beside the gift attribute to associate with the part. To make the attributes required, select the checkbox in the **Required** column. To change the text of the attribute on the donation page, enter the text to display in the **Caption** field.

12. Under **Payment Setup**, select the payment options for website users.
13. Under **Confirmation Screen**, select options for the donation summary that appears after a user submits a donation.
   a. To use the program’s default confirmation screen, select **Use default confirmation screen**.
   b. To customize a confirmation screen, select **Use custom confirmation screen**. The HTML editor appears. The program’s default confirmation screen appears in the HTML editor for you to customize according to your needs.

   In the box, edit the content to appear for the donation summary. To format the content’s appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields. For more information, see the Program Basics Guide.

   **Tip:** Customizations for the confirmation screen remain even if you select **Use default confirmation screen**. To remove your customizations for the screen, select **Use custom confirmation screen** and click **Load Confirmation Template**. The program’s default confirmation screen appears in the HTML editor for you to customize again.

14. In the **Merchant Account** field, select the merchant account to use to process credit card transactions received through the donation form, such as your organization’s IATS account. The system administrator sets up merchant accounts in Administration. For more information, see the Administration Guide.

15. Under **Payment Methods**, select the payment types donors can use to contribute to your organization.

16. To associate an eCard with the donation web page, select **Include eCards** under **eCard Options**.

   For more information about eCards, see the Parts Guide.

### Step 8: Create Links to one or more Events

If your site contains a Fundraiser Dashboard part, a **Go to my dashboard** button appears automatically on the event registration page for your Fundraiser. When a participant clicks the button, she is directed to her Fundraiser dashboard.
1. In the Fund from The Raiser’s Edge frame, in the Fund field, click Select to select the Raiser’s Edge fund to credit with registration fees you collect.

<table>
<thead>
<tr>
<th>Step 8: Create Links to one or more Events in The Raiser’s Edge (Optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>You may optionally set up this Fundraiser to support Event Registrations.</td>
</tr>
<tr>
<td><strong>Fund from The Raiser’s Edge</strong></td>
</tr>
<tr>
<td>For registration fees that are collected, select the fund to use when registration fee gifts are created.</td>
</tr>
<tr>
<td>Fund: (no Fund selected)</td>
</tr>
<tr>
<td>Select</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Giving Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Allow Matching gifts</td>
</tr>
</tbody>
</table>

2. In the Giving Options frame, you can select Allow Matching gifts to add a My company will match my gift checkbox to the page. Site visitors can select My company will match my gift and enter the company name in a Company field.

If you use MatchFinder Online, a Look it up link appears next to the checkbox. Visitors click the link to access MatchFinder Online and search for the company. MatchFinder Online contains information about matching gift companies, such as the minimum and maximum gift details and match ratio. Data from MatchFinder Online integrates with The Raiser’s Edge. For information about MatchFinder Online purchasing options, send an email to solutions@blackbaud.com.

For information about how to download matching gift information to The Raiser’s Edge, see the Blackbaud NetCommunity & The Raiser’s Edge Integration Guide. For information about matching gifts in The Raiser’s Edge, see The Raiser’s Edge Gift Records Guide.

3. In the Required Fields frame, select the checkbox for each donor field to require on the donation form. To ensure you download complete constituent information into The Raiser’s Edge, we recommend that you make all of these fields required.

<table>
<thead>
<tr>
<th>Required Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify whether the following Registrant fields are required</td>
</tr>
<tr>
<td>✓ First Name</td>
</tr>
<tr>
<td>✓ Title</td>
</tr>
<tr>
<td>✓ Phone</td>
</tr>
</tbody>
</table>

4. In the Captions frame, for each button or label listed, specify the text to appear on the event registration form. Enter the text in the field next to each screen item in the grid.

<table>
<thead>
<tr>
<th>Captions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide captions for the following form items.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Previous Button</td>
</tr>
<tr>
<td>Next Button</td>
</tr>
<tr>
<td>Register Button</td>
</tr>
<tr>
<td>Participants/Unit Label</td>
</tr>
<tr>
<td>No Charge Label</td>
</tr>
<tr>
<td>Sold Out Label</td>
</tr>
</tbody>
</table>
5. In the Registration Options frame, select whether to display the event information and selection as two pages. If you include a second page, the website user selects events to register for on one page and enters registration quantity and pricing information on another page. To allow the website user to select both events and registration options on one page, select Exclude the first Event Info/Selection page from registration.

![Registration Options]

To exclude the first Event Info/Selection page from the registration process, mark this checkbox. If the registration includes multiple events, the Event Info/Selection page can be helpful to users. If the registration contains one or few events, you can remove this page to minimize steps for registrants.

Exclude the first Event Info/Selection page from registration

6. To include an event, click Add Event in the Events frame. The Event Search screen appears so you can select an event.

![Events]

Set up the event(s) for this registration form. Click Add Event... to search for an event.

Add Event...

You can include multiple events for the fundraiser. When you add an event, the steps are the same as the add an event steps on the Event Registration Form part. For more information about this part, see the Parts Guide.

Note: When a Fundraiser is linked to an event, you can establish automatic registrations for a family. For more information, see Event Registration for Guests on page 34.

a. In the Attributes frame, select the participant attribute to appear in the Display column. To make the attributes required, select the checkbox in the Required column. To change the text of the attribute on your registration page, enter the text to display in the Caption field.

One-per-record attributes with a type of Date, Text, Number, Currency, and Yes/No can be used in the program. Table type attributes are available without being selected as one-per-record. Fuzzy Date and Constituent Name type attributes are not available in Blackbaud NetCommunity.

b. In the Page Link frame, to add a link to another web page, click Link. The Create Page Link screen appears.

7. In the Confirmation Screen frame, select options for the donation summary that appears after a user submits a donation.

a. To use the program’s default confirmation screen, select Use default confirmation screen.

b. To customize a confirmation screen, select Use custom confirmation screen. The HTML editor appears. The program’s default confirmation screen appears in the HTML editor for you to customize according to your needs.
In the box, edit the content to appear for the donation summary. To format the content’s appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields. For more information, see the Program Basics Guide.

**Tip:** Customizations for the confirmation screen remain even if you select Use default confirmation screen. To remove your customizations for the screen, select Use custom confirmation screen and click Load Confirmation Template. The program’s default confirmation screen appears in the HTML editor for you to customize again.

8. In the **Merchant Account** frame, select the merchant account to use to process credit cards. For example, select your IATS account.

### Step 9: Configure Emails

For detailed instructions about how to create and design the emails in this procedure, see the Email Guide.

1. Click **Welcome Email** to create an email to send to team members after they register on your site.
2. Click **Forgotten Password/User ID Email** to create an email to send to team members who forget their passwords or user ID.

3. Click **Donation Acknowledgement** to create an email to send to donors after they make donations on a Team Fundraiser page.

4. If **Include eCards** is selected on the Donation Form screen, the **eCards Email** button appears for you to create and design an eCard for donations.

5. If receipt stack and number information exists for eReceipts the Settings tab in **Sites & settings**, the **Configure eReceipts** button appears for you to create and design an eReceipt for donations. For more information, see **Design eReceipts for a Fundraiser** on page 33.

   **Tip:** After you create and save emails on this step, email tasks appear as buttons on the action bar. To edit an email, click a button for that email.

6. Click **Save**. You return to **Parts**.

**Design eReceipts for a Fundraiser**

After you create and design the eReceipt, a **Click here to view your eReceipt** link appears at the bottom of the donation confirmation screen. To view and print a pdf of the eReceipt, donors click this link.

1. From the Parts screen, select the part for which you want to design an eReceipt. You can create eReceipts for Donation Form, Fundraiser, and Personal Page Manager parts.

2. In the **Action** column, click **Click here to edit this part**. The Edit Part screen appears displaying the Design tab.

3. Click **eReceipt**. The eReceipt design screen appears.

   **Note:** To create eReceipts, you must establish the receipt stack and number information in **Sites & settings**. For more information, see the **Administration Guide**.

4. In the **eReceipt Options** frame, select whether to create an eReceipt for a **Credit card** or **Debit card**. You can create the eReceipt for both payment methods.

5. To mark the gift as receipted when you download it to The Raiser's Edge, select the **Mark gift as receipted in The Raiser's Edge** checkbox.

   When you select this checkbox, the receipt stack and receipt number from Blackbaud NetCommunity default in the **Receipt Stack** and **Receipt no.** fields on the gift record in The Raiser's Edge. Also, the URL
for a copy of the eReceipt pdf defaults as a gift attribute.

**Warning:** If you use the Canadian version of The Raiser’s Edge, the **Receipt Stack** field appears on the gift record. If you use the U.S. version of The Raiser’s Edge, the receipt stack data does not appear on the gift record.

**Warning:** The program does not create a receipt number unless you include the **eReceipt Number** or **eReceipt Download URL** merge fields when you include eReceipt information in the acknowledgement.

6. In the **eReceipt Content** frame, enter the text to appear on the eReceipt. If you include the **eReceipt Number** field, the eReceipt contains the receipt number for the donation. To format the appearance and layout, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.

7. To preview the eReceipt, click **Preview PDF**.

8. To save the eReceipt, click **Save**. You return to the Edit Part screen.

9. Click **Save**. You return to **Parts**.

**Event Registration for Guests**

When you use The Raiser’s Edge *Event Management*, you can establish automatic registrations for guests only if:

- The Fundraiser is linked to an offline event. For more information, see Step 8: Create Links to one or more Events on page 29.
- The default Personal Page you select contains a link to the Join page on the Fundraiser part. For more information see Step 3: Select Pages for use as Participant and Team Pages on page 16 and **Fundraiser Page Element Parts** on page 4.
- You have created a Welcome email (that most likely contains registration fields).

With these existing conditions, an individual can register himself as a solicitor and additionally register others. The solicitor receives a Welcome email that contains event registration information and registration links for each guest he registered. Next, the solicitor forwards the Welcome email to each guest. After a guest clicks the link in the email and signs up for the Fundraiser, the registration is valid. The guest is not asked to register for the event because the program knows the guest was previously registered. After a successful registration and sign-up, the guest receives the Welcome email. Guests are added automatically to the solicitor’s Address Book. The solicitor is downloaded as a participant on the event record and the individuals he invited appear as guests.

**Note:** If a user registers as an individual (not part of a team) and registers guests, his guests will not receive a confirmation email. The registrant will need to forward the email to his guests.

**Create Team Hierarchy in a Fundraiser Part**

In this section, we demonstrate Team Fundraising hierarchy in an example where participants can create and join teams under one of three corporate sponsors. Each corporate sponsor is at the highest level (Level 1). Participants cannot join or create teams at that level. Teams and participants are at the second level (Level 2). Participants can join and create teams at this level.

**Note:** Refer to the information in this section for Step 2: Fundraiser Options on page 10.

In The Raiser’s Edge, corporate sponsors, a team, and a participant were added on the Solicitors tab in the fund record.
Based on data in this example, team hierarchy on the Fundraiser site will be:

<table>
<thead>
<tr>
<th>Level 1</th>
<th>Company A</th>
<th>Company B</th>
<th>Company C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 2</td>
<td>Team #1</td>
<td>Janet Smith</td>
<td></td>
</tr>
</tbody>
</table>

Team Fundraising participants can sign up on your Fundraiser site, or you can add team levels and participants on the Solicitors tab in the fund record.

**Note:** Solicitors are assigned to constituents in The Raiser’s Edge on the Relationships tab. For information about this process, see The Raiser’s Edge Solicitors chapter in The The Raiser's Edge Constituent Data Entry Guide.

After you add team levels for participants in Step 2: Fundraiser Options on page 10, in the Team Levels grid, “Corporate Sponsor” is added in the first row of the Display Name column. Participants cannot join or create teams at this level. In the second row of the Display Name column, “Team” is added. Participants can join and create teams at this level.

Based on the Blackbaud NetCommunity data in this example, team hierarchy on the Fundraiser site will be:

<table>
<thead>
<tr>
<th>Level 1</th>
<th>Corporate Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 2</td>
<td>Team</td>
</tr>
</tbody>
</table>

Participants can define unique teams and sublevel teams that do not follow the team hierarchy defined in the Team Levels grid. To allow this, select **Allow Independent Teams** in Step 2: Fundraiser Options on page 10.
When registering, if a participant selects to join an existing team, the search results grid appears under the participant search field. These search results depict the team hierarchy created in Step 2: Fundraiser Options on page 10.

<table>
<thead>
<tr>
<th>Name</th>
<th>Corporate Sponsor</th>
<th>Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Janet Smith</td>
<td>Company A</td>
<td>Join Team #1</td>
</tr>
<tr>
<td>Team #1</td>
<td>Company A</td>
<td>Join Team #1</td>
</tr>
<tr>
<td>Joseph Greene</td>
<td></td>
<td>Joseph Greene</td>
</tr>
</tbody>
</table>

In the above graphic, Janet Smith is a member of Team #1. Both Janet and Team #1 are under corporate sponsor, Company A. Joseph Greene joined through the Fundraiser site as an individual participant. He is not on a team. Individual participants do not fall under a corporate sponsor, for example, participants do not fall under a Level 1 hierarchy. After downloading Fundraiser information from the NetCommunity page to The Raiser’s Edge, Joseph Greene will appear on the Solicitors tab in the fund record. A current user on this screen who wants to join an existing team can join Team #1.

While your use of Team Fundraising may vary from this example, the search results grid defaults the following information on your Fundraiser site.

<table>
<thead>
<tr>
<th>Name</th>
<th>Level 1</th>
<th>Level 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant name (can be an individual name or a group team name)</td>
<td>Displays highest level team name the participant belongs to</td>
<td>Displays team name the participant belongs to</td>
</tr>
</tbody>
</table>

The column hierarchy continues to the right of the page for as many team levels as you create.

**Add Help Content for Team Fundraisers**

On the Helplets tab, you can add custom text to help users understand how to use certain features in the Fundraiser part. For example, you can provide instructions for the Login screen or for the various Dashboard buttons.
To create help text, select the Helplets tab. In the **Screen** field, select a screen and enter your text in the box. For more information about the Helplets tab on the Edit Part screen, see the *Parts Guide*.

## Offline Donations for a Team Fundraiser

If a donation is not received online for a Team Fundraiser, the gift is called an offline donation. For example, a cash or check gift is an offline donation. Offline donations can be added for a Team Fundraiser in Blackbaud NetCommunity in two ways.

- If you select **Allow Offline Donation Entry** in Step 2: Fundraiser Options on page 10, a participant clicks the **Enter Offline Gifts** link on the participant dashboard page to add the offline donation.
  
  If you do not select this checkbox, a **View Offline Gifts** link appears on the participant dashboard. Participants click the link to view offline gifts only. Offline gifts cannot be added from the **View Offline Gifts** link.

- The Raiser's Edge user enters the offline donation for the Team Fundraiser in The Raiser's Edge.

  When The Raiser's Edge user enters an offline donation in The Raiser's Edge for a Fundraiser, Team Fundraising reflects the gift in the Fundraiser Dashboard, Report (Fundraiser), and other applicable areas of Team Fundraising such as a Donor List Fundraiser Page Element part.

  **Note:** You should not link an offline donation to an event registration fee. If you do so, the gift will not appear online in the Fundraiser Dashboard, Report (Fundraiser), or other applicable areas of Team Fundraising such as a Donor List Fundraiser Page Element part.

When an offline gift has these conditions in The Raiser's Edge, the gift is included in Blackbaud NetCommunity.

- The Raiser’s Edge gift fund must match the Team Fundraising fund.
- The Raiser's Edge gift type must be Cash or Pledge.
- The Raiser's Edge gift must have one or more Team Fundraising solicitors associated with it.
• The gift does not have a NetCommunity Page gift attribute. This attribute downloads from Blackbaud NetCommunity.

• The Raiser’s Edge gift can have a Blackbaud NetCommunityComments gift attribute. The comment appears on the Donor List for a Fundraiser Page Element.

• The Raiser's Edge gift can be marked Anonymous.

• When you edit an offline gift amount in The Raiser's Edge, the updated gift amount appears on the website. To view the updated amount, the amount must have been edited in the Solicitors field on the gift record in The Raiser's Edge.

  **Note:** For offline pledges entered in The Raiser's Edge, the pledge amount appears until a payment is applied to the pledge. After a payment is applied, the pledge payments display on the Fundraiser, not the original pledge amount. In addition, the Fundraiser includes online payments for online pledges; it does not include payments entered in The Raiser’s Edge for online pledges.

When you download donations, offline donations download to The Raiser's Edge as Pledge gift records with one installment. When your organization receives the cash or check payment, the data entry person can create a Cash payment for the pledge in The Raiser’s Edge.

For information about downloading donations, see the Blackbaud NetCommunity & The Raiser’s Edge Integration Guide. For information about gifts in The Raiser's Edge, see The Raiser's Edge Gift Records Guide.

**Fundraiser Dashboard**

You can add a Fundraiser Dashboard part to quickly display current information about the progress of a Fundraiser part. You can also create dashboards that link to Fundraiser summary reports.

We recommend you designate the website users who can view Fundraiser Dashboard information. For example, do you want everyone to view the dashboards or just board members? After you decide, add the part to a page with appropriate security rights set for the role with those users.

You can add these panels to the Fundraiser Dashboard:

- **Overall Progress Summary** — The Overall Progress Summary provides a comprehensive summary of donations received from the Fundraiser to date. This panel includes the total amount raised, the total number and amount of online and offline donations, the average donation amount, the largest single donor and donation amount, the person credited with the largest donation, and the total personal page hits. You can click Aggregate Goal or Fund Goal to display in the bar graph the amount raised compared to the total aggregate or fund goal.

- **Online Event Registrations** — The Online Event Registrations panel displays the number of individual, couple, and family registrants for the Fundraiser event and the total amount of entry fees for each type of registrant.

- **Top Teams** — The Top Teams panel ranks teams by the top or bottom amount of money raised, emails sent, or page hits. The panel lists each team’s fundraising goal, the amount raised, the number of page hits, and the number of emails sent. Users can filter the dashboard by the number of teams and whether to show the top or bottom performing teams. They can also sort the team list by money raised, emails sent, or page hits.

- **Top Participants** — The Top Participants panel ranks individual participants by the top or bottom amount of money raised, emails sent, or page hits. The panel lists each individual’s fundraising goal, the amount raised, the number of page hits, and the number of emails sent. Users can filter the dashboard by the number of participants and whether to show the top or bottom performers. They can also sort the participant list by money raised, emails sent, or page hits.

- **Top Emails** — The Top Emails panel ranks fundraising emails by the top or bottom amount of money raised. The panel lists the participant’s fundraising goal, the amount raised from the email, and the number of recipients. Users can filter the dashboard by the number of emails and whether to show the top or bottom performers.
Online/Offline Gift Summary — The Online/Offline Gifts Summary panel displays the total amount of Fundraiser donations received online and offline. The panel also includes a pie chart that compares the percentage of online and offline gifts.

Detailed Gift Summary — The Detailed Gift Summary panel lists the total amounts received for the Fundraiser in online and offline gifts. It also includes the amounts of pending, accepted, and rejected online and offline gifts. The panel also includes a pie chart that compares the percentage of pending, accepted, and rejected online and offline gifts.

Email Activity — The Email Activity panel displays the total number of appeal, thank you, and team emails sent for the Fundraiser.

Design a Fundraiser Dashboard

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see the Parts Guide.

1. From the Design tab, in the Source field, select the data source for the dashboard. Select an individual Fundraiser or select “Fundraiser Report” to link the dashboard to a Fundraiser summary report.

Note: If you create a dashboard for a Fundraiser summary report, we recommend that you name the dashboard “Fundraiser Report Dashboard” or something similar to identify it as the dashboard to select in the Linked Fundraiser Dashboard Page field on the Fundraiser Report part. We also recommend that when you create dashboards to link to Fundraiser reports, you place them on standalone web pages that users can only access through the Fundraiser Report part. When a user clicks the hyperlink for a fundraiser report, that web page appears with the dashboard for the report. For more information about Fundraiser reports, see Fundraiser Reports on page 39.

2. In the Panels list, select the checkbox for each panel to include in the dashboard. For more information about the types of panels, see Fundraiser Dashboard on page 38.

3. In the Links box, you can select Enable ‘View Activity Log’ Link to add a link in the Top Participants and Top Emails panels to the solicitor’s Activity Log.

You can also select Enable ‘View Email’ Link to add a link in the Top Emails panel users can click to view the email.

4. In the Color box, you can select colors for the thermometer fill and the chart skin.

5. Click Save. You return to Parts.

Fundraiser Reports

Using the Report (Fundraiser) part, you can create summary or custom reports for your website about the progress of multiple Fundraiser parts. Using the Summary Report type, you can create a standard report displaying information graphically in a 3-D bar graph chart, textually in table format, or both. The Fundraiser Summary section displays summary statistics for multiple Fundraisers including the fundraiser goal, participant goal, total amount raised, total number of fundraisers, total teams, total participants, and total donations. If you include the View Details button, website users can view a page that contains individual reports for each Fundraiser included in the report. If you select a Fundraiser dashboard in the Linked Fundraiser Dashboard Page field, the headings for the individual reports are hyperlinks the user can click to view a dashboard about the selected Fundraiser.

Using the Custom Report type, you can customize the report’s content and appearance using the HTML editor and merge fields.
You can include the same summary statistics as the Summary Report as well as additional details about donations, top fundraisers, top teams and top participants.

### Design Summary Fundraiser Reports

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see the *Parts Guide*.

1. From the Design tab, in the **Type of Report** field, select “Summary Report.” Several options appear below on the screen.
2. In the **Fundraiser(s)** box, select each Fundraiser to include in the report.
3. In the **Report Options** frame, select the format of the report.
   - **Show Chart** — select this option to add a 3-D bar graph chart to the report displaying the Fundraiser Goal, Participant Goal, and Total Raised.
   - **Show Table** — select this option to add a textual table of information to the report.
4. In the **Linked Fundraiser Dashboard Page** field, you can select a Fundraiser dashboard to link to the report. When a user views the report in detail, the headings for the individual Fundraiser reports are hyperlinks the user can click to view the dashboard selected in this field.

   We recommend that dashboards created for linking to Fundraiser reports be placed on a standalone web page that can be navigated to only from the Fundraiser Report part. When a user clicks the hyperlink for the individual fundraiser reports, that web page appears displaying the dashboard for the selected report.

   **Note:** It is important to select the correct dashboard in the **Linked Fundraiser Dashboard Page** field. If you create a report for only one Fundraiser, select the dashboard created for the same Fundraiser part. If you create a report that includes multiple Fundraisers, select a dashboard with “Fundraiser Report” selected in the **Source** field. Otherwise, the linked dashboard may display information that does not match the Fundraisers selected for the report. We recommend that you name your dashboards so you can easily identify the one to use. For information about how to create dashboards, see Design a Fundraiser Dashboard on page 39.
5. In the **Report Caption Options** frame, select the information to include and enter captions for labels on the report.
   - In the **Report Caption** column, select the checkbox for each type of information to include in the report.

   **Note:** If you selected **Show Table** or **Show Table and Show Chart**, all options are enabled for you to select from. If you selected only **Show Chart**, the **Total Fundraisers**, **Total Teams**, **Total Participants**, and **Total Donations** options are disabled because they do not appear in the chart view.

   If you add a **View Details** button, users can click this to view a page that contains individual reports for each Fundraiser included in the summary report. If you selected a dashboard in the **Linked Fundraiser Dashboard** field, the headings for the individual reports are hyperlinks the user can click to view a dashboard about the selected Fundraiser. In the detailed view, users can click **Hide Details** to view the summary report again.

   - In the **Report Caption Text** column, a default caption appears for each type of information. You can use the default or enter a different caption in the field.

6. To customize the size and color scheme for the bar graph section, select **Customize Chart**. This enables the formatting fields in the frame.

7. In the **height** and **width** fields, specify the size of the chart in pixels.

8. Select the colors to use for the bar graph elements, background, and font.
   - Select **Use System Colors** to select system defined colors in the fields on the left.
   - or
   - Select **Use Custom ColSolicitors** to enter RGB color values on the right.

   **Note:** You can customize the table section and its elements using **Style sheets**.

9. Click **Save**. You return to **Parts**.

### Design Custom Fundraiser Reports

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see the **Parts Guide**.

1. From the Design tab, in the **Type of Report** field, select “Custom Report.” Additional options appear below on the screen.

2. In the **Fundraiser(s)** box, select each Fundraiser to include in the report.

3. In the **Custom Report Options** box, use the HTML editor to enter and format the report content’s appearance and layout. Add merge fields to customize the Fundraiser information that appears on the report. For example, to include the number of online donations, drag and drop the **Donations.Number of Online Donations** merge field. For more information about using the HTML editor, see the **Program Basics Guide**.

   **Note:** The **Summary.Total Amount Raised** merge field calculates the total donation amount for all solicitors in the fundraiser. Gifts not associated with a solicitor are excluded from the total amount.

4. Click **Save**. You return to **Parts**.
Scrolling Donor Display

The Scrolling Donor Display part allows you to recognize donors on your website. The part includes a scrolling list of donors (sometimes referred to as a donor wall) for a Fundraiser. You can customize the list by options such as the scrolling direction, play and pause buttons, and gift types to include.

- **Design Scrolling Donor Display**

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see the *Parts Guide*.

1. From the Design tab, under **Select fundraisers**, select the Fundraiser parts to include on this Scrolling Donor Display part.

2. Under **Player options**, in the **Title** field, enter a name for the donor wall. This title appears on your site.

   a. In the **Width/Height** field, enter the maximum dimensions in pixels for the donor wall. This setting defines the height and width of the boundary that contains the donor list.

   b. In the **Scrolling direction** field, select whether to scroll donor names in ascending or descending order.

   c. In the **Speed** field, select how fast to scroll donor names in the donor wall.
d. To include play and pause buttons for the donor wall on the web page, select **Display play and pause options**.

3. Under **Results options**, select options for the part results that appear on the web page. You can filter the list of donors for the donor wall and enter text to appear in the donor wall.

<table>
<thead>
<tr>
<th>Results options</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of results:</strong></td>
<td>Select the number of donors to include on the donor wall. To include all donors, select “All results.”</td>
</tr>
<tr>
<td><strong>Sort results by:</strong></td>
<td>Select how to sort the donor list. When you select first name or organization name, part performance may be affected.</td>
</tr>
<tr>
<td><strong>No results message:</strong></td>
<td>Enter the text to appear if the donor wall does not contain donor names.</td>
</tr>
</tbody>
</table>

a. In the **Number of results** field, select the number of donors to include on the donor wall. To include all donors, leave the default “All results.” You can filter the list of donors to 10, 25, 50, or 100 names.

b. In the **Sort results by** field, select how the donor list should sort. You can select Top donations, Donor’s last name/organization name, or Most recent donations.

c. In the **No results message** field, enter the text to appear if the donor wall does not contain donor names. For example, enter “No gifts found. The Fundraiser may not yet have donors.”

**Warning:** The more donors the list includes, the more hardware space used. This degrades the display load time. To avoid this risk, in the **Number of results** field, select “100” or lower.

**Warning:** If you select “All results,” the part processes a maximum of 10,000 gifts. If the maximum is met, the gifts that appear depend on the selection you make in the **Sort results by** field. For example, if you select to sort by “Most recent donations,” the 10,000 most recent donations appear on the page.

4. Under **Gift types and labels**, select the gift types to include in the donor wall. For example, you can include accepted gifts and pledges and exclude pending gifts and anonymous gifts. For each gift type, enter the text to appear for the gift type in the corresponding field.
Gift types and labels
Select the gift types to include in the donor wall and enter the labels to use for each.

- Include accepted gifts Example: $100.00 gift from John Smith
  Display “gift” as:

- Include pending gifts Example: $100.00 pending gift from John Smith
  Display “pending gift” as:

- Include pledges Example: $100.00 pledge from John Smith
  Display “pledge” as:

- Include anonymous donors Example: $100.00 gift from anonymous
  Display “anonymous” as:

- Include gifts from organizations Example: $100.00 gift from Blackbaud

- Display amount of gift Select to include the gift amount for each donor.

- Display comments in results Select to include the donor’s comments.

Note: The Include pending gifts in results and display as checkbox includes gifts that have not been downloaded to The Raiser’s Edge.

a. To include gifts from organizations, select Include gifts from organizations.
b. To include the gift amount from the donor, select Display amount of gift.
c. To include donor comments, select Display comments in results.

5. Click Save. You return to Parts.

Changes in The Raiser’s Edge

These are issues to be aware of after you download Fundraiser part transactions:

- You can edit the online data on a gift record in The Raiser’s Edge for a gift originally from Blackbaud NetCommunity. You can edit the gift amount, gift date, comments, and solicitor information from Blackbaud NetCommunity. When you synchronize the Fundraiser, changes made to the data in The Raiser’s Edge appear in Blackbaud NetCommunity. If you edit solicitor information, you cannot distribute the gift to multiple solicitors. The gift can have only one solicitor.
**Warning:** To avoid duplicate data, you must click **Synchronize Now** before you edit online gift data in The Raiser's Edge.

- If you move a solicitor to another team in The Raiser's Edge, the next time the solicitor logs into the Fundraiser part on your site, the solicitor is automatically a part of the new team.

- To properly credit a solicitor with a donation using the Fundraiser part, Fundraiser participant information is downloaded to The Raiser's Edge before the donation from the part. Donations do not appear until the Fundraiser is downloaded.

If a team captain does not exist for a donation, a solicitor is not associated with the donation.

For example, if a solicitor is not selected using the Promote to Captain menu option in The Raiser's Edge for a team, a solicitor is not credited with the donation.

For information about downloading Fundraiser information to The Raiser’s Edge, see the *Blackbaud NetCommunity & The Raiser’s Edge Integration Guide*. 