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RunSignUp HowTo Videos

RunSignUp also provides extensive HowTo Videos and Guides on our website. The videos are easily accessible and always available to help educate race directors, charity organizations and fundraisers.

- Basic Donation Setup
- Basic Fundraising Setup
- Advanced Fundraiser Setup
- Charities
- Donation & Fundraising Reports
- Pledges
- Manage Your Fundraising Page

RunSignUp Donation and Fundraising Webinars

- Donation Webinar
- Fundraising Webinar

Additional RunSignUp Resources

- RunSignUp Donation Blogs
- RunSignUp Fundraising Blogs
RunSignUp Donation & Fundraising Manual
2017

This is a comprehensive overview of RunSignUp’s donation and fundraising features.

- **Screen shots with a blue shadow show are of the race director/back-end view in RunSignUp**
- **Screen shots with an orange shadow are of the fundraiser/front-end view in RunSignUp**

Races can access RunSignUp’s donation and fundraising settings from the donation tab on the Race Director Dashboard.

**Set-up:**

The Setup tab is broken down into 4 different areas:
- Basic Setup
- Donation Summary E-mail Setup
- Advanced Fundraiser Set-up
- Fundraiser Questions

**Basic Donation Set-up:**

RunSignUp allows you to set up a donation section within your race page, giving you the ability to enable fundraisers, fundraising teams, pledges, waived event fees based on fundraising minimums and more.

The first step is to select your Donation Processor (this manual is only covering the RunSignUp integration, but please be aware we do offer limited integrations with FirstGiving and Crowdrise).

![Select Donation Processor]

- Additional information about the RunSignUp and Crowdrise integration can be found here: https://runsignup.wordpress.com/2016/12/15/improved-crowdrise-integration/
- Additional information about the RunSignUp and FirstGiving integration can be found here: https://runsignup.wordpress.com/2014/03/01/first-giving-integration/

After selecting RunSignUp as the donation processor, the race can complete these additional fields or enable these options:
- **Accept Donations Starting** (this is the date the race would like to start accepting donations)
• **Accept Donations Until** (this is the last date the race would like to accept race donations. If you would like to accept donations indefinitely, just leave this field blank.)

![Accept Donations Until](image)

• **Overall Goal**

![Overall Goal](image)

• **Description/Additional Information for your organization** - the description will appear at the top of the donation page to let registrants and donors know more about the race, cause and organization. We HIGHLY recommend that races customize this information as donors are more likely to make a donation when they know where the money is going and who is benefiting from their donation.

• **Goal Thermometer** (this will display the Goal Thermometer on the main donation page to show current donation amounts and overall goal)

![Goal Thermometer](image)

• **Donor List Options**
  - Show Scrolling list of ALL Donations
  - Show Scrolling list of top donations/fundraisers for top 25 donations, individual fundraisers and team fundraisers

![Donor List](image)
- **Donation Levels** – races can add as many donation levels as they would like.
  - These options will appear as selection blocks on the main donation page to prompt certain levels of donations.
  - Users will also be given the option to enter their own custom donation amount.
  - Donation levels will be sorted by amount

![Donation Levels Table](image-url)
Basic Fundraising Set-up:

With the use of RunSignUp’s fundraising tools, races can maximize their donations by allowing users to become fundraisers and create fundraising teams.

Here is an overview of the different fundraising settings that RunSignUp currently offers:

- **Allow Users to become Fundraisers** – users will be able to sign-up as fundraisers regardless of whether or not they are registered for the race.

- **Allow users to set-up new fundraiser teams** – fundraiser teams are groupings of fundraisers- each team can work towards a collective goal.
  - If this option is not enabled, users will still be able to join any teams that have already been created, but they won’t be able to create NEW teams.
  - If this option is not enabled, a race director still has the option to create a fundraising team on the back-end of the system.

- **Require that individual fundraisers join or create a fundraising team** – some races don’t want to allow registrants to fundraise individually, so everyone is tied to a fundraising team. If your race has a need for this option, make sure to enable this setting:
  - When this option is enabled, RunSignUp will not allow individual fundraisers

- **Do NOT allow new fundraisers without a registration** – this setting allows races to ensure that only registered participants can fundraise for the race/event.
  - When this option is enabled, registrants will have the option to create a fundraising page during registration or after registration from their registration record in their RunSignUp profile.
  - When this option is turned off, registrants will still have the option to create a fundraising page during/after registration. However, non-registrants will also have the option to become a fundraiser from the “Become a Fundraiser” button/tab on the RunSignUp race and donation pages.

- **If a registrant selected an event that requires a fundraiser, hide the setup form and automatically create their individual fundraiser**
When this option is enabled, the fundraising page creation process will be skipped DURING registration and a page will automatically be created for every registrant in a forced fundraising event.

The registrant will receive a fundraiser created notification email with a link to their page and instructions to access and manage their page.

If fundraising teams are enabled above, the registrant will see the option to set-up a fundraising team page during registration. If a team is created, the individual page will automatically be created and everyone in that transaction will be placed on the team.

If the race is using forced fundraising with waived registration fees, DO NOT enable this option.

- **Force new RACE race teams to create new fundraising teams.**
  
  - This setting should only be enabled if the race is using RunSignUp’s group/team features, which can be enabled under Participants>>Groups/Teams>>Setup.
  
  - If the race is not using race teams, but still wants fundraising teams- please use the fundraising team option above.
  
  - If the race is utilizing race teams because of a need for team specific pricing, minimum/maximum number of team members, etc- then this option can be enabled.
  
  - When this option is enabled, it will force a race team captain to also create a fundraising team page- so the race will have the same number of race teams and fundraising teams.
  
  - If the second option is enabled below, RunSignUp will only allow race team captains and members to join a fundraising team, so individual registrants will only have the option to fundraise individually.

- **Force fundraisers to select a charity (if charities are set up).** – This is a great feature for races that have multiple charities integrated with their registration.
  
  - If this option is enabled and user chooses to fundraise, RunSignUp will force the fundraiser to select the charity they are fundraising for when they are creating their fundraising page.
  
  - If this option is not enabled, registrants will have the option to do generic fundraising, which means the donations go directly to the race. So, these donations can be split up by the race later and paid out to specific charities at the race’s discretion.
**Forced Fundraising:**

RunSignUp has the option to require fundraising on a per-event basis. In the “Waived Event Fee Settings (Optional)” table, each event is listed in a new row. The race can decide, by event, if they are going to require that all participants become a fundraiser by checking the box in the “Require Fundraiser” column.

- **Require Fundraiser** – when this option is enabled, everyone registering for that event will be forced to create a fundraising page during registration. If the race would like each registrant to have a fundraising page, but would like it hidden during registration- make sure to check the “If a registrant selected an event that requires a fundraiser, hide the setup form and automatically create their individual fundraiser” option above.

- **Fundraising Minimum (Fee NOT Waived)** – If an amount is entered in this column, registrants will be forced to agree to the minimum amount during the fundraising page creation process. Use this column if the race wants registrants to agree to the minimum fundraising amount and pay the registration fees for the event.

- **Fundraising Minimum (Fee NOT Waived)** - If an amount is entered in this column, registrants will be forced to agree to the minimum amount during the fundraising page creation process. Use this option if the race wants registrants to agree to the minimum fundraising requirement in exchange for a FREE race registration.

- **Donation Deadline for Waived Event Fee** – this is the deadline for reaching the minimum fundraising requirement for the “Fundraising Minimum (Fee Waived)” option.
  - If fundraisers have not met the minimum by this date, RunSignUp does NOT automatically remove them from the race.
  - However, we do provide a report and a simple way for the race to bulk-remove these registrants if they chose to.
  - This report can be found in the Fundraisers Tab. Click the green REPORTS drop-down menu and select Fundraiser Minimums. Fundraisers who have met their minimum can be hidden and anyone who is left can be removed by selecting the “Remove Registrants” action in the “Select an Action” drop-down menu.
Number of Guaranteed Fundraiser Entries – This is the number of guaranteed fundraiser entries that you would like to allow for each event in your race. RunSignUp looks at the number of registrants that have had their fee waived, up to this guaranteed number. Be careful when using this setting, as it could override participant caps that you have set-up for an event, which would result in slightly overselling an event.

**Fundraiser Milestones:**

RunSignUp gives races the option to add milestones that will display at the top of fundraiser pages once they reach a certain donation amount. RunSignUp also has the option for fundraiser BADGES, which can be enabled on the “Advanced Fundraiser Settings” page after the basic milestones are set-up.

<table>
<thead>
<tr>
<th>Milestone Amount</th>
<th>No. of Stars</th>
<th>Milestone Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>$25.00</td>
<td>1 Stars</td>
<td>You are 10% of the way there! Every $25 raised is enough to send one child to running camp for</td>
</tr>
<tr>
<td>$100.00</td>
<td>2 Stars</td>
<td>Amazing job! $100 is enough to sponsor 3 kids for a week of “At-Home-Training”&lt;br&gt;</td>
</tr>
<tr>
<td>$250.00</td>
<td>3 Stars</td>
<td>You’ve Done it! You have raised enough to sponsor a child for one month of running camp!</td>
</tr>
</tbody>
</table>

- **Milestone Amount** – This is the amount that the fundraiser needs to raise in order for the milestone STAR and Milestone text to appear
- **No. of Stars** – This is the number of stars that the race would like to appear next to each milestone test. RunSignUp has the option of 0 Stars – 5 Stars.
- **Milestone Text** – This is the milestone text that the race can customize so it appears at the top of the fundraising page next to the stars.

**Milestone Badges:**

If a race would like to utilize the milestone badges, they can set them up on the Advanced Fundraiser Settings Page under Donations>>Set-up>>Advanced Fundraiser Set-up. Milestone badges appear on a fundraising page, once the fundraiser has met the set milestone. Milestone badges are used to motivate and encourage fundraisers as they continue to recruit donations and support your organization.
• **Milestone Column** – This column shows the milestone text set-up by the race on the basic fundraiser set-up page

• **Badge** – Here the race can upload a custom badge for each milestone that has been reached. If badges are used, the badge will appear INSTEAD of the milestone text and the milestone stars on the fundraising page.

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**Fundraiser Refunds:**

RunSignUp gives races the option to offer refunds once a fundraiser reached a certain threshold for their associated fundraiser page. Registrants who set-up a fundraiser will need to select a checkbox indicating that they want the refund if they reach goal.

The refund amount and threshold can be setup on a per event basis:

- **Donation Amount at which the Registrant Will be Refunded** – This is the amount that the fundraiser needs to raise in order for a refund to be initiated for this event. For instance, a race might want a fundraiser to raise $750 in order for their half marathon registration fee to be refunded, $500 for the 5K and $100 for the 1 mile event.

- **Refund Amount** – This is the amount of the registration fee that will be refunded

- **Ensure Registration Balance** – This is the net amount of the registration fee that the race wants to keep for this event.
  - In this scenario, the half marathon registration fee is $125. The race wants to make sure that they keep $25 for every half marathon registration, so they are offering a $100 refund.
  - However, if this fundraiser originally used a $10 coupon code when they registered, RunSignUp would only refund them $90 if they hit the $750 fundraising threshold.
The participant paid $115, so RunSignUp will ensure that the registration balance doesn’t go below $25.

- **Notes:**
  - The option to apply for a fundraiser refund is only available while registration is open, so fundraisers can’t receive a fundraiser refund if they meet the fundraising threshold after the race has passed.
  - The processing fee for the registration is NOT refunded
  - If a registrant did not select that they want to be eligible for a fundraiser refund during the registration process and later wants to “opt-in,” this is something that the race can help with by editing the setting in their fundraising page:
Default Fundraiser Messages:

RunSignUp has an option for race directors to enter a default fundraiser message. This message will populate on each new fundraising page that is created for individuals or teams. Fundraisers will have the ability to edit, delete or add to this default message once their page is created.

- We recommend that races take the time to customize this setting when fundraising is turned on.
- There are a surprising number of fundraisers that don’t take the time to customize their page, so having a default message makes the page look nicer, gives charities more control over their branding, and more people will be willing to make a donation to a fundraising page when they know where the funds are going and what they are supporting!
- The default fundraising message will appear on a fundraising page in a format similar to this:
**Offline Payment Instructions:**

Most organizations still accept donations by check, so RunSignUp gives races an easy way to facilitate these check donations so they can be tracked along with overall race donations. You can enter offline payment instructions for donors who would prefer to mail in a donation or donate in person by cash/check.

- Once the offline donations are received by the organization, they can be manually entered or batch imported under Donations>>Manual.
- Offline donations must be entered by a race admin or a charity contact (we don’t have a way to allow fundraisers to enter their own offline donations on their fundraising page)
There are a few different display settings that races can choose from when setting up their donation and fundraising pages. At the bottom of the page, expand the “Display Settings” section:

- **Donation Page Text** – By default, the race name shows at the top of the donation page. Races can update this text so other text will appear instead of a race name.

- **Donation Description/Additional Text Location** –
  - When races use a certain combination of settings, sometimes the donation description will appear at the bottom of the donation page, instead of the top. Races can use this setting if you want to make sure that the description always appears at the top of the donation page:

  ![Display Setting Options]

- **Donation Page Image** – Here races can upload an image that will appear at the top of the donation page, instead of your race logo. This will also appear on each fundraising page when a fundraiser does not upload a personal image.
• **Donation Tab Text** – Races can use this field if you would like the main DONATE button to display different text, for instance SUPPORT US!

![Donation Tab Text](image1)

• **On Behalf Of Display Text** – when making a donation, donors will have the option for their donation to show their name, anonymous or they can use the “on behalf of filed” if they would like to make a donation on behalf of someone else. Some races would prefer that the “On Behalf of” text say something different, like “In Memory Of” or “In Honor Of”- which can be customized in this field

![On Behalf Of Display Text](image2)

• **Menu Item Placements** – There are a few different options that will appear on the race menu, when certain donation and fundraising settings are enabled. RunSignUp allows you to customize how you would like these fields to display on the race page. These options are available for these tabs:
  - Become a Fundraiser
  - Top Fundraisers
  - Top Charities
  - Individual Fundraisers
  - Team Fundraisers

  If these settings apply to the donation and fundraising settings that are enabled, races can choose if they want these items to be:
  - Top Level Menu Items
  - Sub-Menu under Donate (“fly-out” menu option under the donate tab)
  - Hidden from the Menu
• **Top Fundraisers Display** – by default each individual fundraiser and fundraising team will have it’s own “Block” on the donate page. The donation blocks look like this:

![Top Fundraisers Block Example]

- Races can choose to show a single column list of fundraisers instead of these blocks with the option “Instead of showing top fundraisers as a series of blocks, show them as a single-column list.” With this setting, the page looks like this:

![Single Column Fundraiser List Example]

- **Charity Display** – If a race has only one charity integrated with the registration process, RunSignUp will default to hiding the charity information on the main donation page. Usually the race will customize the description with information about the charity. However, there is an option to still show the charity information- even if only one charity is tied to the race.

  ![Charity Display Setting]

- **Email Customization** – There are a few different emails that are sent through RunSignUp for donations and fundraising. These emails are dependent on the features that are enabled and if
the notifications are turned on. You can customize each of these emails by following the links in the display settings section:

- **Donation Confirmation Email** – This is the email that is sent to the donor after a donation is made. Usually, races will want to customize this email to include organization name, organization address, tax ID and some thank you text.
- **Donation Cancellation Email** – In RunSignUp, donors have a 15 minute window where they can void a transaction. If this CLEAR button is used, the system will send the donor an email to confirm the cancellation.
- **Fundraiser Creation Email** – This is the email that is sent to each fundraiser once their page has been created. The email includes information on how to access and edit their fundraising page settings.
- **Fundraiser Deletion Email** – This email is sent out if a race deletes a fundraising page.
- **Fundraiser Donation Email** – This email is sent out the fundraiser to let them know when a donation has been made to their page.
- **Fundraiser Donation Cancellation Email** – This email is sent to the fundraiser if a donor clears/voids their donation within the 15 minute time window.
- **Fundraiser Goal Reached Email** – This email is sent to a fundraiser if they have set a goal for their fundraising page and they REACH it!
- **Fundraiser Minimum Reminder Email** – For races with required fundraising minimums, this email can be used to remind fundraisers of the amount they have committed to, let them know how far they are from their goal and remind them of their fundraising link so they can keep recruiting donations.

- **HEPDATA** – We have done an integration with HEP DATA to provide an easy way for donors to find out if their companies offer a matching gift program and how to process those matching gifts. Here is a blog with more information on how to use this feature: [https://runsignup.wordpress.com/2016/10/14/matching-gifts/](https://runsignup.wordpress.com/2016/10/14/matching-gifts/)
Other Basic Settings:

- **Tax Deduction Rules**
  - If donations or registrations for your race are tax deductible, races can enter that information and RunSignUp will calculate the deductible amount for donors and registrants.
  - **Donation Percent**
    - If donations or registrations for your race are tax deductible, races can enter that information and RunSignUp will calculate the deductible amount for donors and registrants.
  - **Donation Percent**
    - If donations or registrations for your race are tax deductible, races can enter that information and RunSignUp will calculate the deductible amount for donors and registrants.
  - **Registrations** – here you will enter the amount of the registration fee that is NOT tax deductible.
    - The system then calculates the percent that is tax deductible after any other discounts, coupons, or adjustments have been made during the registration/payment process.
    - It is pretty rare for races to use this setting, so please read carefully if you are setting this up.

- **External Donation Websites** – RunSignUp gives races the ability to link to external websites for donations. If you are using Crowdrise or FirstGiving for donations, you would enter those links in this section:

- **Customizing Processing Fee Text and Display** – RunSignUp gives races the opportunity to prompt registrants to pay the processing fee for stand-alone donations. While the number of donors that select this option is relatively small, it is still a great feature designed to save charities money.
  - Go to Financial>>Pricing>>Processing Fee Type
  - Select the option for “Give donors the option to pay the processing fee when making a stand-alone donation.”
  - In addition, races can add a custom prompt specific to their organization to encourage donors to pay the fee.
Races can view the link to their fundraising page under Donations>>Links

Your Donation Page is now live at the following web address:

https://runsignup.com/Race/Donate/CA/SanDiego/NataliesTestRace
Advanced Fundraiser Set-up:

There are quite a few “advanced” fundraising features that are not used by a large number of fundraising races. However, RunSignUp has a very easy way for you to enable these features when they are needed.

Fundraiser Types:

If a race wants to be able to categorize their fundraisers, they can add fundraiser types for individuals, teams or both. Fundraising types are most commonly used by races that give out prizes for different types of fundraising teams. Some fundraising types might include: Corporate, Friends and Family, Hospitals, Community Teams, College Teams, etc.

- Races can set-up their fundraiser types and choose if they want to set a default type.

- When a fundraiser is creating a fundraising page, they will have the option to create or join a new team-

- Races can choose who should be choosing a team type during the fundraising process (teams, individuals, individuals and teams). It is not very common for individuals to select a fundraising type, so it most cases- races will want to choose “Team fundraisers” from the drop-down menu.
**Fundraiser Customizations:**

By default, RunSignUp refers to individual fundraisers as “Fundraisers” and groups of fundraisers as “Team Fundraisers.” However, there are certain events where this terminology does not always fit perfectly. So, there is a way for a race to replace the term “fundraiser” and “team fundraiser” with verbiage that is more specific to their needs.

- For instance, a jog-a-thon might replace fundraiser with “student” and team with “classroom” so it makes more sense to donors and parents.

- Races can also customize the text that appears in the fundraising page header, the “Create or Join a Fundraising Team” prompt, and give specific instructions to prompt fundraisers to create or join a team.
**Fundraiser Roster Report:**

RunSignUp gives races the option to allow team captains to view their team roster report. In addition, if captains are allowed to view their roster, the race can choose which fields a captain should be able to view. This can be enabled at the bottom of the Advanced Fundraising settings under Donations>>Set-up>>Advanced Fundraiser Set-up:

- When the fundraiser roster report is enabled, fundraising team captains will be able to view their roster from their fundraising settings and download a CSV of their team members and information:

**Fundraiser Questions:**

Fundraiser Questions can be enabled under Donations>>Set-up>>Fundraiser Questions.

- Fundraiser Questions are asked to fundraising team captains ONLY.
- If you have a question that you want asked of every registrant, not just fundraising captains - you will want to set-up the question under Race>>Registration>>Questions.
**Charities:**

Races can add a charity or multiple charities to the donation process. Charities can be added under Donations>>Charities.

**Charity Settings & Set-up**

- Click the ADD CHARITY button to add each charity and customize their unique page

- **Enter Charity Name**
- **Upload Charity Logo**
- **Enter Charity URL**
- **Add Charity description**
- **Confirmation Email** – this gives a race the ability to set a specific donation confirmation email message based on the charity that the donation was made to. This way, the tax ID and thank you message will be specific to each charity, instead of at the overall race level.
- **Default Fundraiser Message** – similar to the default fundraiser message on the basic fundraising set-up page, charities can add a default message specific to their fundraisers. This way, if a fundraiser chooses to fundraise for Charity A- their fundraising page will display text that make sense for their charity.
- **Charity Goal**
Charity Management (ADMIN Settings): There are also a few ADMIN settings that the race can choose from as they add each charity

- Offline Donations - a race can allow a charity to enter their own offline donations through their charity management dashboard. This option is only available if you are granting the charity direct payment access. To enable this option, check the box for “If set up with direct charity payment (below), allow the charity to enter offline donations for your race.”

- Display Charity on RSU, but don’t accept donations - There are a few different circumstances where a charity might need to be displayed to donors and/or during the registration process, but they aren’t able to accept donations through RunSignUp.
  - One example of this is a national charity that has their own registration provider - they still want to appear so registrants are aware that they are part of the race. However, they can only accept donations through their platform.
  - If a race has a charity with a similar situation, they can be added to RSU as a charity and the race can check the box for “Do not accept donations on RunSignUp for this charity. Instead, this charity will link to the Charity URL listed above.”
  - This way, the charity is still clearly listed as a charity partner and they can accept donations through their own platform.

- Hide Charity from the public – this setting is rarely used, but it is convenient if a race has a charity partner that drops out mid-way through registration. In this case, the race wouldn’t want to delete the charity because donations have already been made to the organization. With this option, the race can hide the charity to prevent future donations and still have detailed accounting records for the existing donations.

- Direct Payment Set-up (Optional) – Races have the option to grant each charity access to a charity management dashboard. This option is only available to a charity if they will receive direct payments for donations.
  - Enter Contact Name
  - Enter Contact Email
  - Click SAVE CHARITY
  - Once the contact information is entered, the charity contact will receive an email with instructions to claim their account and access their charity management dashboard.
Charity Management (Charity Access)

- **Charity Access** – When a charity is granted direct payment access, they will also have access to their own charity management dashboard so they can view their donations, payments, and fundraisers. This is a great feature for races to utilize, since it allows races and charities to have fully integrated donation and fundraising reporting, while also taking work off of the races plate!

- **Charity Management Dashboard** - After a charity contact is added, they will receive an invitation to accept the access and set-up their payment information. Once they have set-up their user account and claimed access, they will see this Dashboard:

  - **Donation Summary** – View a summary of donations to your charity by race.
  - **View Payments** – View payments to your charity.
  - **Access Control** – Give people access to your charity management pages.
  - **Payment Setup** – Set up your payment details.
  - **Payment Options** – Set up your payment options.
  - **Offline Donation Entry** – Enter offline donations.
  - **View Fundraisers** – View fundraisers for your charity.

  - **Download Donations** – Each charity will be able to see a quick summary of the donations they have received for each race they are tied to. They can also click the **DOWNLOAD DONATIONS** button to view a full donation report with donor information.

  - **View Payments** – This report gives a quick summary of the charity payments. The charity can click on PAYMENT DATE link to see a detailed list of each donation in that payment with the donor information and payment amounts.

  - **Access Control** – This is where a charity admin can grant access to other charity administrators. They can give someone full access or read only access.

  - **Payment Set-up** – This is where the charity will set-up the payment info/address for the charity payments.

  - **Payment Options** – Charities can put payments on-hold if they want to wait until a certain date to receive funds. (Some charities don’t want to receive the funds until the race has passed)

  - **Offline Donations** – If access is granted by the race, charities will have access to enter their own offline donations and assign them to a fundraising page. The charity can click on Offline Donations, then click on the Race Name and they will see the option to enter the donation information and tie it to a fundraisers.
- **View Fundraisers** - Charity contacts can click on the "View Fundraisers" link to see a list of their fundraisers, links to the fundraising pages, fundraiser contact information and totals raised.
Charity Donation Checkbox

Races can add a quick donation option on the checkout page. This is meant to be simple and quick, which is why the setting can only be enabled for one charity and a fixed donation amount.

- If enabled, the registration checkout page will include a checkbox to add a fixed donation amount towards the selected charity. The checkbox appears right below the credit card number and, as mentioned above, can be set for a single charity and a fixed dollar amount.

- In order to add the checkbox, the race must have at least one charity set-up under Donations>>Charities. The race can enable it with a simple checkbox, set the amount and pick the charity (if there are multiple).

- If the race only has one charity and fundraising is not enabled, the donation page will be skipped during the registration process and only the checkbox will show on the checkout page. If the race would like the donation step to show, they can turn on the setting “Always show Donation Step” in the charity checkbox settings:

- If the race has more than one charity, the donation page will show during registration in addition to the checkbox on the checkout page. If a registrant makes a donation to the charity on the donation page, the checkbox will not appear for them on the checkout page. This is by design to prevent double donations.
Reports

RunSignUp offers a variety of donation, fundraising and pledge reports. These reports can be viewed directly in the back-end of RunSignUp or downloaded as CSV files.

Donation Reports

Races can view donation reports under Donations >> Reports >> Donation Reports.

- **Donation Totals** – the main donation report page gives a clear outline of the following information:
  - Total Number of Donations
  - Total Amount of Donations
  - Total of donation processing fees paid by the race
  - Total amount of donations after processing fees

- **Charity Totals** – the main donation report page also gives a clear breakdown of donations broken down by charity, if charities are enabled for the race.

- **Donation Amounts** – RunSignUp provides a graphical report and a summary of the donation amounts for the race. This allows races to view a quick summary of donation totals and see if there are certain donation amounts that are “trending.”

- **Donor Information** – there is a quick display of donor information that appears at the bottom of the main donation report page. RunSignUp shows basic donor information on this page, but provide a way to download a CSV report with additional donor information.
  - **Donation Editing** - From the donor information grid, a race can click the EDIT button on the far right of the donation if they need to update the “On behalf of” information, assign the donation to a different fundraiser, or make the donation anonymous. If multiple charities are enabled for a race, the race does not have the ability to move the donation from one charity to another- this is for financial reasons as the donation might have already been paid out to the charity, etc.
- **Donation Refunding** – It is very rare, but races do have the ability to refund a donation if they need to. The normal $1 refund donation fee does apply in this situation.

- **Donor Information Download** – Underneath the donor information grid, the race can click the Download All as CSV link full a detailed donation report.

- **Donation Filtering** – Races can easily search and filter for specific donations when needed. The filtering fields also allow races to run customized reports for certain donation periods, charities, date ranges or donation amounts.

  - **Races can filter by:**
    - Donor First Name
    - Donor Last Name
    - Email Address
    - Donation start date
    - Donation end date
    - Donation Period (this allows races to search for previous year donations)
    - Donations Greater Than
    - Donations Less Than
    - Donation Status (active, cleared, refunded)
    - Charity

  - Once the filter is completed, the race can download the report by choosing the “Download Current Report as CSV” option in the ACTIONS drop-down menu.

- **Donation Year Over Year Summary** – Races that are renewed on RunSignUp have a quick report to view a year over year donation summary. This report allows them to see the donation totals for multiple years, so they can track how donations are trending:

<table>
<thead>
<tr>
<th></th>
<th>Nov 18, 2014 to Jan 28, 2016</th>
<th>Jan 28, 2016 to Feb 6, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. Donations</td>
<td>6,794</td>
<td>4,923</td>
</tr>
<tr>
<td>Total Donation Amount</td>
<td>$681,056.02</td>
<td>$451,748.65</td>
</tr>
<tr>
<td>Processing Fees</td>
<td>$12,573.75</td>
<td>$10,443.47</td>
</tr>
<tr>
<td>Total Donations After Fees</td>
<td>$668,482.27</td>
<td>$441,305.18</td>
</tr>
</tbody>
</table>
Matching Gifts

In the donor information section, a race can keep track of matching gifts on a per donor basis.

- In the donor report, the race can click the EDIT button in the matching gift column of the donation to record matching gift information.

| Donation ID | Name         | Amount | Amount Paid | Processing Fee | Amount After Fees | Partner Fee | Transaction ID | Donation Level | Fundraiser | Fundraiser Team | Donation Date | Manual Entry | Status | Anonymous | On Behalf Of | Matching Gift |
|-------------|--------------|--------|-------------|----------------|------------------|-------------|----------------|----------------|------------|----------------|---------------|--------------|--------|-----------|-------------|--------------|----------------|
| 6340        | Bill Hewlett | $25.00 | $25.00      | $0.00          | $25.00           | $0.00       | Bronze         | 11/16/2016     | 4:30pm     | HP             |              | Yes          | Active | No        |             |              |                |
| 6339        | Bob Bicciel  | $45.00 | $45.00      | $0.00          | $45.00           | $0.00       | Bronze         | 11/16/2016     | 3:57pm     | Heinz          |              | Yes          | Active | No        |             |              |                |

- When a matching gift is entered, it will appear on the total list of fundraisers and create a manual donation entry for easy reporting.

<table>
<thead>
<tr>
<th>On Behalf Of</th>
<th>Matching Gift</th>
<th>Is Gift Match?</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT&amp;T</td>
<td>N/A</td>
<td>Yes (585413)</td>
</tr>
<tr>
<td>Heather Dorsett</td>
<td>AT&amp;T Received</td>
<td>No</td>
</tr>
</tbody>
</table>

- The additional funds will update the fundraiser’s total if associated with a specific fundraiser or fundraiser team.
**Fundraiser Reports**

- **Fundraiser List Report** - The fundraiser list report can be found under Donations>>Fundraisers.
  - **Donation Period** – races can filter by donation period, which is helpful for renewed/repeat races on RunSignUp.
  - **Fundraiser Type** – Search by individual fundraiser pages, team fundraiser pages or any fundraiser type.
  - **Name Search** – type in a fundraiser name or a team name for a quick search.
  - **Fundraiser Information Grid** – by default, the grid will display these fields:

<table>
<thead>
<tr>
<th>Fundraiser</th>
<th>Fundraiser Type</th>
<th>Linked Reg. ID</th>
<th>Captain</th>
<th>Charity</th>
<th>Goal</th>
<th>Donations</th>
<th>Collected</th>
<th>Included Fundraisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>#46734</td>
<td>Team</td>
<td></td>
<td></td>
<td>Semper FI Fund</td>
<td>$1,952.80</td>
<td>50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#108671</td>
<td>Team</td>
<td></td>
<td></td>
<td>Semper FI Fund</td>
<td>$2,000.00</td>
<td>27</td>
<td>$2,248.60</td>
<td></td>
</tr>
<tr>
<td>#13777</td>
<td>Individual</td>
<td>10986541</td>
<td></td>
<td>Semper FI Fund</td>
<td>$150.00</td>
<td>4</td>
<td>$151.20</td>
<td></td>
</tr>
</tbody>
</table>

- Fundraiser Name
- Fundraiser Type (individual or team page)
- Linked registration ID
- Captain Name
- Charity Name
- Goal
- Total number of donations
- Total Collected
- Included Fundraisers – clicking on the “SEE LIST” button will bring up a pop-up window where each team member is displayed with a link to each fundraising page.
• **Fundraiser Report Generator** - this is a very robust report that allows races to view top fundraiser reports, top team reports and also filter by team size or donation totals. This report can be found under Donations>>Reports>>Fundraiser Reports.

![Fundraiser Report Generator](image)

- **Select Donation Period**
- **Select Report type** (Captains or Top Fundraisers)
  - **Captains** – This provides captain contact information for all teams or just certain team types.
  - **Top Fundraisers** – Once you select this report type, you will be able to filter by fundraiser type, team type, team count and donation totals
- **Select Fundraiser Type** – these are the fundraiser types that are set in advanced fundraiser settings
- **Select Individual or Team**
- **Sort By** – Team Size or Donation Amount
- **Number of Top Fundraisers** – choose from 5, 10, 25 or 100
- **Filter by Participant Question Response** – This setting allows you to filter the report based on answers to participant questions. These are the questions set-up under Race>>Registration>>Questions, not the fundraiser questions. Only YES/NO questions are applicable for this unique type of filtering.
- **Click PREVIEW REPORT** to view the result on the device
- **Click GENERATE REPORT** to download a CSV file with the results
- **Fundraiser Minimum Report** - If a race has enabled forced fundraising with minimum fundraising requirements, this report can be utilized to view who has met their minimum requirement, send reminders to recruit donations or send invoices to fundraisers who didn’t reach the minimum amount by the fundraising deadline.

  - To access this report go to **Donations>>Fundraisers**. In the green reports drop-down menu, select **Fundraiser Minimums**.

  - **Hide Fundraisers that have met their requirement** – select this option to show only fundraisers who haven’t their minimum in the report. This will only show people who have a “Remaining Amount Required” of greater than $0.00.

  - **Hide Fundraisers whose team has met their requirement** – a team fundraising requirement is calculated by adding up all of the fundraising minimums for each person on the fundraising team. Some races will ignore individual fundraising requirements if the team, as a whole, has met the team minimum. If the race is accounting for team fundraising minimums, they can select this option.
- **Show Team Details** – If this option is checked, the report will refresh and include 3 additional columns: Sum of Team Minimums, Team Remaining Amount, Number of Team Members

  - **Fundraiser Minimum ACTIONS** – Once the report is filtered, the race can select all fundraisers on the page or manually select specific fundraisers. There are three actions the race can choose from for these fundraisers:
    - **Email Reminders** – RunSignUp will send the “Fundraiser Minimum Reminder” email to remind the fundraiser that they haven’t yet reached the minimum amount they committed to. The email will include a link to the fundraising page so they can easily recruit more donations.
    - **Remove Registrants** – RunSignUp will remove the checked registrants who haven’t met the minimum fundraising requirement from the race when this action is selected.
    - **Invoice Registrants** – RunSignUp will send invoices to the selected registrants for the “Remaining Amount Required.” The race will be able to keep track of any paid invoices under Financial>>Invoicing>>View Invoices, so they can enter these invoice payments as manual donations to update each fundraiser’s donation total.

### Managing Fundraiser Pages

Race admins have the ability to edit, view and delete a fundraising page directly from this fundraiser GRID. Race admins can also ADD a new fundraising page at the bottom of the page.

  - **EDITING** – race admins have the ability to change the following fields:
    - Fundraiser Name
    - Fundraiser Goal
    - Goal Thermometer Display
    - Scrolling Donor List Display
    - Charity
    - Minimum Requirement
    - Individual or Team setting
    - Fundraiser URL
    - Captain Email
    - Linked Registration ID
    - Personal Fundraiser Message
    - Fundraiser Image
    - Fundraiser Refund Opt In
    - Personal Fundraiser Message
    - Fundraiser Image

  - **VIEWING** – race admins can click the VIEW button to view the fundraising page display

  - **DELETING** – Fundraisers don’t currently have the option to delete their own fundraising page, so if necessary a race admin would need to delete the fundraising page on the back-end of the system. A race admin can click the DELETE button from the fundraiser grid to remove a fundraising page from the race.
o **ADDING** – When fundraising is enabled, fundraisers can create their own fundraising pages during, after or outside of the registration process (depending on the race settings). However, there are some situations where a race admin might need to manually create a fundraising page for someone. This can be done under Donations>>Fundraisers. At the bottom of the page, click the **ADD A FUNDRAISER** button and enter the fundraising page information.

o **IMPORTING** – If a race needs to create more than a few fundraising pages, they can import the fundraising page information from a CSV file. This can be done under Donations>>Fundraisers. At the bottom of the page, click the **IMPORT FUNDRAISERS** button and choose your CSV file with the appropriate fundraiser fields.
Donation Summary Emails

Races have the ability to set up automated reports based on specific donation ranges. For example, the executive director of a non-profit organization might want a notification email if someone donates over $1,000. However, another person in the organization might want to be notified when someone donates over $250, so they can quickly reach out and send a personal “thank you.” These summary emails can be customized under Donations>>Set-up>>Donation Summary Email Set-up.

- The email settings, subject, frequency, delivery time and recipients are completely customizable for each race. There is not a limit to the number of donation summary emails that can be set-up for a race.
  - You can set-up the summary emails with these steps:
    - Enter the Message Subject
    - Choose Email Frequency (Daily or weekly on a certain weekday)
    - Choose Delivery Time
    - Set minimum donation amount for the email
    - Set maximum donation amount for the email
    - Enter Recipient Names and Emails
    - Save Email Settings
- The email will include summary of donations that have processed in the specified range during the selected time period.

<table>
<thead>
<tr>
<th>Donation ID</th>
<th>Donor</th>
<th>Donor Contact</th>
<th>Donation Amount</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>810553</td>
<td>Anonymous</td>
<td></td>
<td>$250.00</td>
<td>01/20/2017</td>
</tr>
</tbody>
</table>
RunSignUp offers an advanced donation pledging system. Many fundraising events have some type of pledge component to them where donors promise to support fundraisers based on the number of laps or miles completed. Sometimes donors will also pledge a fixed amount, but they don’t commit to make the actual donation until completion of the race or event. The wide variety of pledge settings and options makes this a very flexible solution for most events with a pledge component.

**Pledge Setup**

Races can now turn on Pledges under Donations>>Set-up>>Advanced Fundraiser Set-up. At the bottom of the page, the race will see the option to enable “Donation Pledge Settings.” **Note the pledge section does not appear or work unless the race enables it first.**

Here is an overview of the different settings that can be enabled when pledges are accepted for an event:

- **Pledge Type** – races can choose a per lap, per mile, fixed amount or custom text option. When using these “per” settings- only whole numbers can be entered and pledged.

- **Minimum & Maximum “Per” Values** – If a pledge is not a fixed donation amount, fundraisers will need to enter the minimum and maximum number of laps/miles they think they will complete. Races can set the minimum/maximum values to prevent a fundraiser from entering an extremely small or large number of laps/miles.
- **Allow Fundraiser to manually add pledges to their fundraiser** – when this option is enabled, fundraisers will be able to add and manage their own pledges. This is a nice feature to turn on so race admins don’t have to manually import/enter each pledge.

- **Include pledges in publicly listed donation totals and donor lists** – if this option is enabled, pledges will be added to the fundraiser totals when the pledge is entered. If the race would prefer to wait until the actual check is received before the donation is added to the fundraising page, they will want to leave this option off and use the setting below.

- **Allow Fundraisers to mark that they received manual payment for a pledge and include fundraiser received pledges in publicly listed donation totals and donor lists** – this setting will allow fundraisers to mark when they have received manual payments for a pledge, so they are confirming that the check/cash is in hand before the donation would appear on the list or the donor is included in the scrolling list display.

- **Automatically send E-mails to donors with instructions to complete their pledge after a participant enters their final number of laps/miles/km/etc** – when the race or event is complete, a fundraiser can view their fundraising page through the “My Fundraisers” section of their profile to enter the final number of laps/miles completed.
  - Once the final number is entered, RunSignUp will automatically send pledgers an email letting them know the amount owed and include a link to complete the pledge.
  - “If all manual donations haven’t been entered by the race and tied to fundraisers and existing pledges, pledgers could receive these links in error. As such, it is important for the event to enter or import any manual donations and tie them to existing pledges as soon as possible.

- **Expected Donation Date** – this is the date when you expect to receive actual donations for all pledges.

- **Allow Fundraisers to update the expected donation date on pledges** – this setting is useful for fundraisers as a pledger might tell the fundraiser the date they turn in their check/cash. This allows the fundraiser to enter that specific date and keep track of pledge dates when they differ from the event date.

- **Offline Payment Instructions** – If a race/event accepts pledges offline, enter instructions on where to send checks and the information that should be included (pledger name, fundraiser name, pledge ID, etc.)
Once the donation pledge settings have been enabled, the race will want to enable pledges for fundraisers.

- To enable pledges, go to Donations>>Fundraisers
- Click on the ACTIONS menu
- Select Enable Pledges for Fundraisers

![Actions Menu]

Once pledges are set-up in the race and enabled for all fundraisers, here is an overview of how the pledge process will work for “pledgers:”

- On each fundraising page that has pledges enabled, there will be a small header that says “Donation Pledges” and prompts the pledger to click the link:

  ![Donation Pledges]

  If you do not want to make a donation now, but would like to make a pledge to this Jog-A-Thon Runner, click here.

- On the pledge page, the pledger can select a “per X” amount or a fixed donation. They can also set a maximum donation- just in case the fundraiser does more laps than expected or budgeted.

  ![Pledge Amount]

  Pledge Amount:
  - Donate Per Lap
  - Fixed Donation

  S per lap

  About 1 - 70 laps
  Approximate Donation: Fill in Pledge
  Maximum Donation

  S

  On Behalf Of:
  - My Name
  - Anonymous
  - Other

- The pledger will see a confirmation page confirming the pledge details with a link to come back and complete the pledge, which will convert it into a donation.
The pledge link will also be emailed to the pledger and they can access it directly from their RunSignUp profile under “My Pledges” in the Financial Links section.

When the donor clicks the link to complete the donation, they will have the option to change the amount they finally donate.

**Pledge Reports**

There is complete pledge reporting and management for both race admins and fundraisers.

- **Race Admin Pledge Reports** - When pledges are enabled, pledge details will show in the fundraiser list report in the “other details” column.

  - The race/event can also search for specific pledges by name/email or drill down into the pledges with a summary report that displays:
    - Number of pledges
    - Maximum Donation amount for all pledges
    - Maximum donation amount not collected
- **Fundraiser Pledge Reports** – Fundraisers can view a report of their pledges from their fundraising page in the Pledge tab. This is the same place that fundraisers can edit an expected donation date or mark that manual pledge has been received.

  ![Pledge Report Example](image)

  o The fundraiser can also download this pledge report as a CSV or add more manual pledges on this page if the setting has been enabled by the race/event.

- **Pledge Editing**

  o **Edit Pledge** - The details of specific pledges can also be edited by the race, in case the information was entered incorrectly or the pledger requests that the race make a change to their pledge details.

  o **Update Final Count** – From the fundraiser report, the race can update the final count of laps/miles or they can let each participant do this from their fundraising management page. If there are a large number of fundraisers or if the race wants to make sure that every fundraiser has a completed lap count, the race can upload the counts under Donations>>Fundraisers>>ACTIONS>>Import Final No. of Miles.

- **Pledge Completion Emails** –

  o If the setting is enabled, RunSignUp will automatically send out pledge reminder emails once the final number of laps/miles has been entered for a fundraiser.

  o If automated emails are not enabled, race admins can also send out these emails manually. To send the emails, follow these steps:
    - Go to Donations>>Fundraisers
    - Select ACTIONS drop-down menu
    - Select Send Pledge Completion Emails
    - Click the PREPARE EMAILS button
    - Pledge completion/remind emails will be sent out to anyone that made a pledge, but hasn’t completed the pledge with a donation.

  o A pledge can be completed manually with an offline donation. When the offline donation is entered, it can be tied to a pledge ID. This will complete the pledge so the pledger won’t receive any pledge reminder emails.

  o **Donation already entered and not tied to the pledge?** You can update the pledge by following these steps:
    - Use the donation report to search for the donation
    - Note the donation ID
    - Go to Reports>>Donation Pledges
    - Search for the pledge and click EDIT PLEDGE button
    - Enter the donation ID
    - Click UPDATE PLEDGE button
This will tie the donation to the pledge, so the pledger doesn’t receive future pledge reminder emails if they are sent out manually.

**Manual Donations**

Races can enter manual offline donations under Donations>>Manual. Donations can be entered one-by-one or imported from a CSV File.

**Entering Donations**

- On the manual donation page, click the ADD MANUAL DONATION button
- In the pop-up window, the race can enter the basic donation information and additional fields.
- Then click the SAVE DONATION button
- The required fields are:
  - Donor First Name
  - Donor Last Name
  - Donor Email Address
  - Donation Amount
  - “On Behalf Of” information
- The additional/optional fields are:
  - Bib Number - if bib numbers have already been assigned, the race can enter the participant bib number and the rest of fundraiser/donor information will populate
  - Fundraiser – if fundraising is enabled, the race will be able to tie a donation to a fundraiser so the donation will show in the fundraiser reports and the total will update on the fundraising page
  - Charity - this is for reporting purposes only. Funds for manual donations will not be sent directly to the charity. *Please note that if the charity is set-up with direct payment, the race can give the charity the option to enter their own offline donations.*
  - Donor Address, City, Country, Zip Code and State

![NEW MANUAL DONATION](image-url)
RunSignUp does not send out a donation confirmation email for these individual offline donations, but these donations are included in the race donation and fundraising reports and noted as offline.

### Importing Donations

- On the manual donation page, click the IMPORT MULTIPLE DONATIONS button.
- When importing from a spreadsheet, RunSignUp will provide a page to align columns from the spreadsheet to the database. In the pop-up window, the race can enter the basic donation information and additional fields.

The final step of the import is to show the data on the screen, so it can be confirmed or adjusted before importing. Once confirmed, click the IMPORT DONATIONS button.
- **Pledge ID** - If pledges are enabled, the race can tie a donation to a pledge ID which will mark that pledge as completed.
- **Fundraiser ID or Name** - If Fundraisers are enabled, the race can tie a donation to a fundraiser (either by name or fundraiser ID) which will add the donation to the fundraising totals.
- **Donation Confirmation Emails** - If the “Send a donation confirmation E-mail to the donor for each donation above” option is checked, RunSignUp will send out a donation confirmation email at the time of the import.
**Communication**

Fundraisers can use RunSignUp’s email marketing capabilities, since we have customized the system for use with donations and fundraising. Fundraisers can now email donors when they are logged into RunSignUp from their My Fundraisers Tab. In order for fundraisers to use the email tools, the communication section needs to be enabled by the race.

**Send Emails**

- Go to Donations>>Communication>>Send Emails
- The first time visiting this page, the race will need to set-up a new SendGrid account in order to use the donation communication tools. (This email account is separate from the main email marketing account in the race under Email Marketing).
  - Confirm Race and Contact information on the set-up page
  - Click the SUBMIT button
- Upon creating the email account, the race will easily be able to email donation and fundraising groups:
  - Current Donors
  - Current Fundraisers
  - Previous Donors
  - Previous Fundraisers
  - Any Custom list that is added under Donations>>Communication>>Manage Lists

- The robust email marketing system also provides a few other features for races, very similar to the main email marketing component of RunSignUp
  - Ability to Insert your own HTML code
  - Send Email Immediately
  - Schedule email for a future time, with dynamic email list capabilities
  - Upload an email attachment
  - Exclude a list of recipients from receiving certain emails
- For emails sent from the race level, races can customize the “From Name” and “Reply To” email address under **Donations>>Communication>>Manage Email Settings**.

- Races can also choose if they would like the race logo to appear in the top right corner of the email. They can enable this setting here:
**Fundraiser Email Templates**

RunSignUp Fundraisers now have the ability to send emails from the system. One of the advantages of this is that you can set-up default fundraiser templates for fundraisers to use. We see races have success with this, since it makes recruiting donations a little bit easier and also gives the race control over their branding and messaging that is sent out to donors.

- In order to allow fundraisers to send emails, races must have the option enabled under Donations>>Communication>>Manage Email Settings:

  ![Enable Fundraiser Communication](image)

  - Allow fundraisers to send emails.

- Once enabled, races can set-up default email templates under Donations>>Communication>>Fundraiser Email Templates. This requires formatting and inputting HTML code, but you can design a very nice looking emails:

  ![Donation Request Template](image)

  - Races can add multiple email templates on the race director dashboard in three different areas:
    - Donation Request Templates
    - Donation Thank You Templates
    - Fundraising Team Recruitment Templates
Once the templates have been added to the race, fundraisers will be able to send emails and select any of the templates the race has created:

Once the template is selected, fundraisers have the ability to add their own customizations or verbiage to the email. This gives your fundraisers the ability to add their own personal touch, while still including the race branding and mission.

**Email Options** – on the left hand menu, you can see that fundraisers have some menu options to help guide fundraisers to the different capabilities of RunSignUp and the email options available.

- **Send Emails** – this is where fundraisers can send an email, choose a template and customize it to make it their own.
- **Manage Contacts** – this is where fundraisers can view their existing contacts, existing lists, and manually remove certain contacts if necessary.
- **Import Contacts** – this is where fundraisers can add email contacts or upload a spreadsheet of donor information for future emails.

**Fundraiser Email Settings**

- **From Name** – emails sent from a fundraiser will have the “From Name” of the fundraisers First and Last Name.
• **From Email** – emails sent from a fundraiser will come from noreply@runsignup.com, as RunSignUp does not have permission to send on a fundraiser’s behalf. RunSignUp uses this as the from address to maximize deliverability rates.

• **Reply To Email** – emails sent from a fundraiser will have the reply to email address that is tied to the fundraising account.

**My Fundraisers**

**Accessing Fundraising Management**

- Fundraisers can access their fundraising page directly from their RunSignUp user profile. To access their page, they can go to their PROFILE and click MY FUNDRAISERS under the “Runner Links” section. This will show a list of any fundraising pages they have created in RunSignUp.

- In this example, the fundraiser has an individual page and a team page.

- The fundraiser can click EDIT FUNDRAISER to manage the fundraising page.
From the EDIT FUNDRAISER page, the fundraiser has access to:
   Change the Fundraising Page name
   Update the fundraising goal (if a minimum fundraising amount was require for the race, the system won’t let the fundraiser update the goal to an amount below the minimum)
   Update the Fundraiser URL
   Update the Personal Display Message
   Update the Fundraising Page Image
   Create or Join a New Fundraising team
   The fundraiser will not have access to update their charity or delete their fundraising page. This is something a race admin would need to assist with on the back-end under Donations>>Fundraisers.

From the VIEW DONATIONS page, the fundraiser can see a list of their donations and donor contact information.

From the PLEDGES page, the fundraiser can manage and enter pledges, depending on the pledge settings that are enabled for the race

From the LINKS/SHARING page, the fundraiser can quickly email out the link to his fundraising page or embed a donation widget into their personal website.

Send Emails, Manage Contacts, Import Contacts - if fundraiser emails are enabled, the fundraiser will be able to access the templates and manage contacts here

TEAM PAGES – team captains will see two additional settings that don’t appear for individuals:
  o View Roster (if enabled under Advanced Fundraiser Settings) which will allow them to see a list of their team members and contact information
  o Fundraiser Captains Section - here team captains can add additional team captains, if they would like to grant captain access to another person.

---

**Fundraiser Captains**

You can allow other people to manage your fundraiser. They must set up a RunSignUp account first. If they do not have an account, they can create one by clicking the Sign Up button at the top of the RunSignUp homepage. Once they have an account, you can enter the E-Mail address they used to set up their account.
Fundraising Management Permissions

Some races would like a little more control over fundraising pages after the registration process is complete, so RunSignUp offers a fundraising management setting to allow race directors to choose what fundraisers can edit. These settings can be enabled under Participants>>Participant Management>>Fundraiser Management.

- Allow Participants to set-up new fundraisers
- Allow Participants to update existing fundraisers
- Allow Changes to Core Fundraiser Details (fundraiser name, associated team, fundraiser type, charity)
- Allow Changes to Fundraiser Question Responses

Still Have Questions?

If you still have any questions about donation or fundraising- don’t worry – the RunSignUp team is here to help. Our customer support team is available to answer any additional questions that you might have- just shoot an email to info@runsignup.com. Happy Fundraising!