Discover the power of CrowdRise and learn exactly what to do and how to drive your campaign's success.

Quick start guide
Getting started

Social fundraising on CrowdRise
Logging in
Navigation
Account dashboard
Charity profile

Create a campaign

Campaign ideas
Creating a fundraiser campaign
Creating an event campaign
Campaign customization
Engaging your supporters

Reports & analytics

Access your data
Take action

Additional features

Payment processors
Donor Covered Fees
CRM integrations
Registration integrations
Buttons, widgets and recurring gifts
Best in class service
GETTING STARTED

CrowdRise is the leading all-in-one platform that enables you to add social fundraising to everything you do.

Social leadership
- $2B in donation data
- 30mm donor community
- 1mm campaigns launched
- Social Amp

Simple to use
- ONECampaign paradigm
- Self-service
- Mobile-optimized
- User experience

Scalable
- Custom branding
- Email configuration
- Flexible registration
- PCI level 1

Success
- Data & analytics
- Sharing attribution
- Onboarding
- Fundraising expertise
Log into your account

Step 1
Go to www.crowdrise.com and click “Log In” in the upper right hand corner.

Step 2
Enter your email address and password and click the “Log In” button. If you can’t remember your password click the “Forgot Password?” link.

Success tip
Logging in for the first time? Check your email. Our customer service team will be sending your PIN to access all charity features.
GETTING STARTED

Using the dropdown to navigate

1. Click on the dropdown menu in the top right corner of the page.
2. Charity name will appear here.
3. Most recent fundraisers will show here.
4. Click account tab to go to your account dashboard.
GETTING STARTED

Manage your account from the account dashboard

**Edit Profile:**
Add a charity logo, mission statement and video to share your brand on your profile page.

**Funds:**
Choose your payment processor - WePay *(recommended)* or Network for Good. Each distributes your funds differently; select which best suits your financial practices.

**Notifications:**
Control which email alerts your charity receives when someone donates to campaigns or starts raising money for your charity.

**Report center:**
After you've verified your charity with the PIN, view and download reports to understand campaigns, donors and fundraising goals.

**API credentials:**
It's your data, use it. Customize your own microsites and design your own user flows within your charity's website or automatically pull donor and fundraising data into the donor database tools you already use.

**Manage subscription:**
Discover all the CrowdRise features and services to make sure you have the plan that meets your needs.
GETTING STARTED

Personalize your charity profile page

The power of CrowdRise combined with the power of your brand is an unbeatable combination.

Upload a video and add your mission statement

Engage your supporters in an interactive way with your profile page. Visually communicate your charity’s mission in a compelling way.

Add charity logo

Help potential supporters identify your cause and find your charity profile across the platform. Choose an image that represents the narrative of your mission.
CREATE A CAMPAIGN

Plan your campaign

*Host nearly any type of fundraising campaign or event.*

Donation pages
Matching & sweepstakes
Galas & dinners
Registration & ticketed events
Tournaments
Runs, walks & rides
Team fundraising
Supporter social fundraising
CREATE A CAMPAIGN

Create a fundraiser campaign

Fundraisers are ideal for:

- Raising money for a single charity
- Recruiting individuals to join your team
- Donate only campaigns

How to create a fundraiser

1. Go to your profile page
2. Click the “Fundraise for this charity” button
3. Follow the fundraiser creation process
CREATE A CAMPAIGN

Create an event campaign

Events are a perfect fit for:

- Creating friendly competition between fundraising teams
- Fundraising for multiple benefitting charities
- Registration
- Ticketed events

How to create an event

1. Scroll to the CrowdRise footer
2. Under Event Managers click on “Start an Event”
3. Follow the event creation process
CREATE A CAMPAIGN

Customize your campaign

Be sure to customize your campaign from the Edit Page on the Campaign Dashboard before launching and sharing with everyone.

Set your goal
Determine the goal you’re aiming for and update it.

Success Tip: Always set a goal. You can change it later, even once the campaign is in progress.

Create a compelling story
Great campaigns start with great copy. Tell all of your supporters why you’re raising money.

Upload an amazing photo
A photo is worth a thousand words; make your photo speak to your supporters.
CREATE A CAMPAIGN

Engage your supporters

 Easily manage all of the things you need to do to keep your supporters engaged throughout your campaign’s lifecycle.

Share

Share your campaign everywhere you typically would. Link to it in emails, include it on your website, share on social media, and even via word of mouth.

Thank

A thanked donor is an appreciated donor. Thank donors directly in CrowdRise and they will receive an email with your personalized note.

Update

Update your campaign with text, photo, and even video updates. Tell everyone what’s going on and push the bar for fundraising.

Repeat

Your campaign is ongoing, continue to engage your supporters and drive your campaign’s success.
Reports and Analytics

Access all of your data in the report center

**Report types:**
- Donation report
- Monthly donations
- Team member report *(detailed)*
- Team member report *(summary)*
- Registration report
- Deposit report

**Filter your data:**
- Date
- Campaign
- Deposit

**Data gathered:**
- Name
- Email
- Mailing address
- Donation amount
- Date/time of donation
- Fundraiser that generated the donation

Export report as a .csv file
REPORTS AND ANALYTICS

Take action based on your data

Grow your network

Keep in touch with all of your new donors and manage them in one place. Download your reports into .csv and import them into your donor database so you can reconcile new information and add new donors and participants.

Re-launch your event

Get a head start by reaching out to everyone who fundraised or donated last year using the data available in your Team Member Detail Report or Donation Report.

Reconcile payments

See exactly which donations should be included in each check from Network For Good using the Donation Report and filtering by month. If you’re using WePay, map the Batch Id from the WePay Deposit Report to your Donation Report.

Leverage your top fundraisers

Determine who your top fundraisers are for your campaign using the Team Member Detailed Report. Consider rewarding them with a prize, matching them with a newer or less successful fundraiser to share tips, or feature them in an email blast.
You can choose which payment partner best suits your financial practices.

**How will we receive funds?**

*Preferred Method*

From Account Settings, nonprofits can set up WePay and link directly to a bank account for funds to be deposited daily, weekly or monthly.

**NOTE:** Nonprofits set up with WePay at the start of this Challenge or endurance event will not be impacted by the NFG to PPGF switch.

**Default Payment Partner**

Donations are sent to your nonprofit via check on the 15th of every month for donations made in the prior month.

**NOTE:** Nonprofits currently utilizing Network For Good as a payment partner have the option to switch to WePay or will be transitioned to PayPal Giving Fund by March 31st.

**New Default Payment Partner**

Donations are sent to your nonprofit either monthly via PayPal Business Account (enrolled nonprofits) or via check between 40 and 90 days from donation date. Enrollment involves 3 simple steps and typically takes 3 days.

**NOTE:** All nonprofits not utilizing WePay will be transitioned to PayPal Giving Fund by March 31st.

**Donor Advised Fund**

ADDITIONAL FEATURES
Raise more money for your cause

Your donors want to help you, let them with donor covered fees.

Donors are given the option to cover your charity fees so 100% of their donation goes to you.

Most donors cover fees, making the average effective rate on the platform 2.2%.

That's even lower than credit card processing fees through your own website.

Plus, campaign pages are responsive, meaning they are optimized for all devices to maximize your donor conversion rate.
Integrate with the leading CRMs

Automatically import your donation data and contacts from CrowdRise into your CRM to make reporting and donor management a breeze.

*Not all integrations are available on all plans. Please contact our sales team at sales@gofundme.com to upgrade your plan.
Seamlessly combine registration and fundraising

Participants can register for your event and launch their fundraising campaign in one simple experience when you integrate with our registration partners.
ADDITIONAL FEATURES

Take advantage of additional functionality

Easily keep your supporters engaged beyond your CrowdRise campaigns.

**Donate button**
Accept donations from anywhere. Add a dedicated donate button to your website. Your donations will be included in your CrowdRise reporting.

**Fundraise widget**
Enable all of your supporters to become fundraisers. Add a dedicated fundraiser widget to your website to encourage social fundraising.

**Recurring gifts**
Make it easy for your supporters to give regularly to your charity by choosing a monthly recurring donation. This functionality is already turned on for you.

Start using these features today.

*Email our success team at success@gofundme.com to learn more.*
ADDITIONAL FEATURES

Best in class service

*We’ve got the teams and resources to help you succeed.*

**Support Center**
Get step-by-step instructions and answers to the most commonly asked questions. The support center is a searchable database to answer your questions on your timeline.

https://support.crowdrise.com

**Customer Service Team**
Get answers to your questions and support with CrowdRise functionality. The customer service team is the fastest way to get email support when you need it.

nposupport@gofundme.com

**Success Team**
Get the most out of CrowdRise tools with help from a dedicated team. They will equip you with resources, tips, case studies, and best practices.

success@gofundme.com
success@gofundme.com