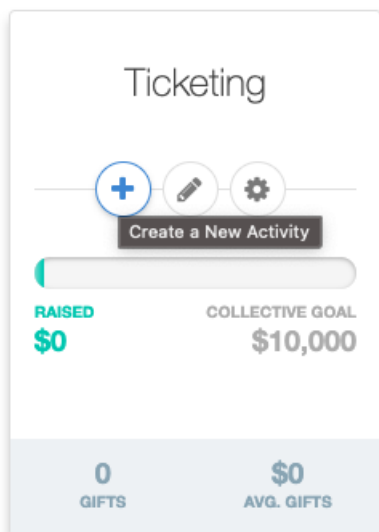# Set Up a Crowdfunding and Peer to Peer Activity

Crowdfunding and Peer to Peer Fundraising empowers your supporters and staff to efficiently collect donations on your behalf from their social networks. Individuals can easily set up their own fundraising pages in minutes from any device. All donations and donor data are directly and securely captured inside your organization's account.

To handle all of the components to a Crowdfunding and Peer-to-Peer Fundraising activity, there are several pieces to set up.

1. Create the Activity and set up your keyword.

To create a Crowdfunding and Peer-to-Peer Fundraising activity, you need to have a Campaign already created. If you do not have a Campaign, or want to add this activity to a new one, click on New Campaign to create one and follow the process on creating a campaign, **as outlined here**.

Then create a new activity from the **New Activity button** on the dashboard on the right or hover your mouse over the **Campaign Tile** and click on the **Plus icon**.

In the pop up, select **Crowdfunding and Peer-to-Peer**.

×

What kind of activity do you want to create?

📄 **Online form**
Collect donations, sell tickets, recruit volunteers, and more

💬 **Texting keyword**
Capture texted donations and new subscribers

👥 **Crowdfunding/Peer-to-Peer**
Recruit teams and individuals to fundraise

You will be taken to the Activity creation page known as the Setup Keyword page.

It is recommended for a Crowdfunding and Peer-to-Peer Fundraising keyword *NOT to end it in a number*. The reason why is because this keyword that you create will also be used for each team and fundraiser but incremented with a number.

Example: *If you create the "root" keyword of CFEXAMPLE, then if you had eighty six volunteer fundraisers than each of their keywords to go directly to their own personalized page will be something like CFEXAMPLE1 to CFEXAMPLE86.*

1. Either type in a new **Keyword**, or select an existing one to reset and start from scratch.
   ○ For more information about reusing, moving or reassigning a keyword, click here.
2. Select a **Campaign**.
   ○ If you create your activity from the Campaign Tile or within the campaign, it automatically selects the campaign for you.
3. Set your **Fundraising Goal**, or the amount you want to have raised by the end date of your campaign
   ○ or use the switch to disable the Goal from showing on any of the Crowdfunding and Peer-to-Peer Fundraising pages.
4. Click **Save** to create your activity.

Once you've successfully created your keyword, the system will assign the keyword and make it live. Then it will will redirect you to the **Fundraiser Dashboard**. The Dashboard is where you will likely want to be during your campaign as it will show you your list of volunteer fundraisers and their details in a table view.

Detailed Set Up Your Keyword Info

2. Set up your Fundraising Page

This is the main fundraising page for your Crowdfunding and Peer-to-Peer Fundraising activity. This is the page that your supporters will see before they **donate**, **become a fundraiser or share your campaign**.

This is the main page and the choices made here (colors, images, layout) will cascade to the team and fundraiser pages so that brand recognition stays the same across the pages.

As you are personalize your page, the mobile version will show to the right. If you want to see what it looks like on larger screens, like on a PC, click on the Desktop button above the mobile view or click on the Fundraiser Form in the lower left of the page.

The things you will want to personalize:

- **Logo & Branding**: This provides the overall look of your Crowdfunding and Peer-to-Peer Fundraising activity. Add a Logo, set the background image or background color, they style of the Team and Fundraiser cards displayed at the bottom of the Fundraising page and set the overall color of the page using the Accent Color.
- **Banner**: This the bar across the top of the form in your **Accent Color** that is always visible as you scroll down the page. Set the logo if you didn't do it in the Logo & Branding section, provide a donation button that will be visible when the regular Donate Button scrolls off the top of the page, and some banner text, such a as slogan or the keyword and shortcode.
- **Media Carousel**: Share the name of your Activity and provide pictures and videos about your campaign that can automatically cycle through each item.
- Goal: show your numbers for the peer to peer and crowdfunding campaign, including a **Progress Bar and the total amount raised, the Donor Count and Fundraiser Count.**
- **Buttons**: personalize the **Donate Button** and the **Fundraiser Button**.
- **Tab Sections**: Talk about your campaign on the Impact tab and then show or hide the Teams, Fundraisers, Donors and Comments sections as desired. You can also rename any of the tabs to better fit your needs.

Detailed Fundraising Page Design Info

3. Set up your Online (Donation) Form and Confirmation Page

This is identical to the **Text to Donate Activity Design**, because you are designing the same style Donation form that you can find there.

There are only two additions. One in the **Suggested Amounts** section and one in the **Submit Section**.

In Suggested Amounts, you have the choice to enable/disable the attribution feature. This allows a donor who donates from the Fundraising Page to attribute or assign their donation to a team or fundraiser, as **described here**.

Suggested Amounts

Section Heading   Show ⬤

    Choose amount

    $ 25.0 $ 50.0 $ 100.0

Default Donation Amount

    $ 25.0

Peer-to-Peer Attribution   Show ⬤
Allows people to attribute their support to teams and fundraisers

                                                    + Add Form Element ▾

In the **Submit Section**, there is an extra Option to sign up as fundraiser.

Form Submit

Section Heading

    Donation amount

Button Text

    SUBMIT

14 character limit   0 / 14

Enable Re-Captcha   Disable ○

Option to sign up as fundraiser   Enable ⬤

Confirm before submitting   Disable ○

                                                    + Add Form Element ▾

Enable this feature to ask the donor if they would like to also become a Volunteer Fundraiser. When they submit their donation, they will be presented with a pop-up screen. If they select **Confirm and Sign Me Up**!, it will send the donor to the **Volunteer Sign Up Form** if additional information is required, otherwise, it will take them directly to the **Personalize Your Page** screen. If they select No, it will take them to the Confirmation page.

You're almost done!   X

Please make sure the following amount is correct: **$25.00**
You have the opportunity to support us further, please consider signing up as a fundraiser.

Confirm and Sign Up Later   Confirm and Sign Me Up!

Detailed Donation Form Design Info

4. Set Up Your Sign Up Form

The Sign Up Form is where your volunteer fundraisers will sign up to receive their own fundraising page for them to raise money on your behalf.

- Set your **Logo and Branding** features just like any other form, with appropriate colors, logos and images.
- Include a **Call to Action** to inspire your volunteer fundraisers or provide information and links to help them as they become fundraisers
- Collect their **Personal** information, so you know who they are and how to reach them. Consider adding requests for Social Media handles so you can tag them, cheer them on and showcase their efforts easily.
- Check the **Submit** section to change the wording of the button **Become a Fundraiser**

Detailed Sign Up Form Design Info

5. Teams

Create and configure your Team pages. The term "Teams" is the generic term used for that point where individual fundraisers can rally around. You may call them Teams, Initiatives, Departments, Coaches or anything else.

Team Settings: Review and set the Team Settings first, before creating teams. On this tab, you can choose how fundraisers interact with Team options: can they join and/or create teams? The rest of the Teams settings tab provides the template that all the teams will use. Set a generic team goal and message for all teams, set carousel images that can be different from the main fundraising page and set the default team image that will appear on the team pages and on their cards on the Fundraising Page.

Don't forget to click **Save**!

Team Manager: You can create teams simply by typing in the Team Name and clicking**Add Team** or just hitting the Enter key. The Team Manager tab will show you the progress of each team and let you see their Team pages by clicking on their names. You can also edit or delete teams as desired.

6. Fundraisers

When you go into your Peer to Peer and Crowdfunding Campaign, you start on the Fundraiser Dashboard. This will list the Fundraisers who have signed up with you and a snapshot of their success. You can also modify the default settings for your fundraisers from here.

When you edit fundraisers, you can add them to a team, make them a team captain so they can control the team page, change or add their picture and edit their added text if needed.
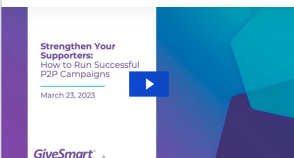
The **Fundraiser Settings** lets you set the template for all your fundraisers to start with on their page including their goal and the text that will appear on their page.

The **Communication Settings** tab lets you select how you would like to automatically alert them (Text and/or email) when someone do

Additional Resources

	Looking for ideas? Check out this Crowdfunding and Peer-to-Peer Fundraising Guide. Click here.
	Need help planning out your Crowdfunding and Peer-to-Peer Fundraising event? Check out our Peer-to-Peer Fundraising webinar just for customers. Click here to view.