

Quick Start Account Checklist

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You've just signed up with GiveSmart Fundraise. Your event is days away. Here are the *absolute basics* you need to get ready for your event. Click each button to be taken to the instructions.

Create a Merchant Account

Do This

- You need a way to collect and process donations made by credit card. This is by far the most imperative component to set up.
- View the Merchant Account FAQ page [here](#).

IMPORTANT: Without a merchant account linked to your GiveSmart Fundraise account, you can't process or receive payments.

Create a Donation Form with a Keyword

Do This

- The Text to Donate activity will create your Donation form for your event. You can use this anywhere you want, and as you create it, you will be given a link to the form suitable for sharing to social media, texting, etc.
- More importantly, you will also **create a Keyword** that supporters can text to initiate the giving process at your event.

Personalize your Thermometer

Do This

- As part of the Text to Donate process, you can create a Fundraising Thermometer to project onto a screen at your event.
- The Fundraising Thermometer significantly enhances your event, allowing donors to see their name and donation amount displayed.

Get Trained

Do This

- We know you're in a hurry. Check out our training courses to take you through the fundamentals of your GiveSmart Fundraise account.
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