



ExceedFurther Team Fundraising

Overview &
Setup Prep Session

April 2022

Tech with Purpose, Driven by Cause.

ExceedFurther Team Fundraising

- Team Fundraising allows your organization to **extend** the way you attract and engage donors today
- Team fundraising **empowers groups of people** to work together to raise funds. Setup a team fundraising event, virtual and/or live, invite your supporters to register, create a team or join an existing team, and raise funds together, **always under your brand**
- Track fundraising results instantly and view your **Top Teams, Top Participants and Top Donors**, one click away to another gift
- Easy setup and administration

Team Fundraising: real-time fundraising!

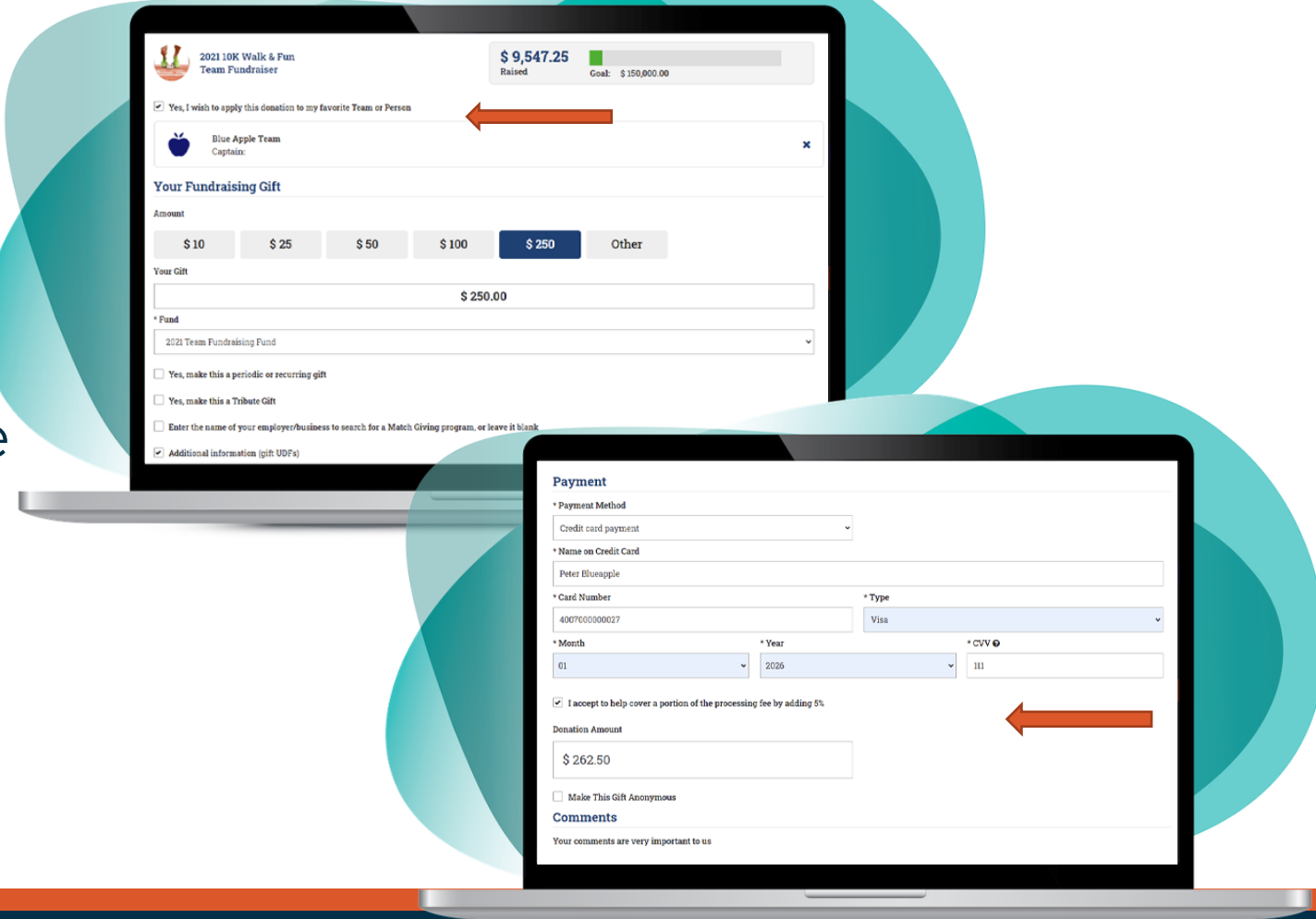
- Each Team member easily creates a personal fundraiser
- View funds raised roll-up to meet the team's goal and the overall goal
- Allow independent participants to join and participate

The screenshot shows a personal fundraising page for the 'Team Blue Apple Team'. The page header includes the team name, a goal of \$2,000.00, and a progress bar showing \$5,192.25 raised. The main content area contains a message from the team captain, Sandra Blueapple, thanking supporters for their commitment to raising over \$3,000.00. Below the message is a 'Your Donation' section with buttons for \$50.00, \$100.00, \$250.00, \$500.00, \$1000.00, and 'Other', along with a 'Donate Now' button. A 'Donor Leaderboard' is also visible, listing donors and their amounts.

The screenshot shows a team fundraising page for the '2021 10K Walk & Fun Team Fundraiser'. The page features a banner image of a person's hands on a running track. The main content area includes a 'Donate Now' button, a 'Register to Walk & Fundraise' button, and a progress bar showing \$14,282.75 raised against a goal of \$10,000.00. The page also contains a '10K Beginner Training Schedule Goals' section with three bullet points: 'Walk 10K (5.2 miles) in two hours or less', 'Improve walking technique and walking posture', and 'Feel great after finishing a 10K walk'. At the bottom, there are three tables: 'Top Teams', 'Top Participants', and 'Top Donors', each with columns for Name, Raised, and other details.

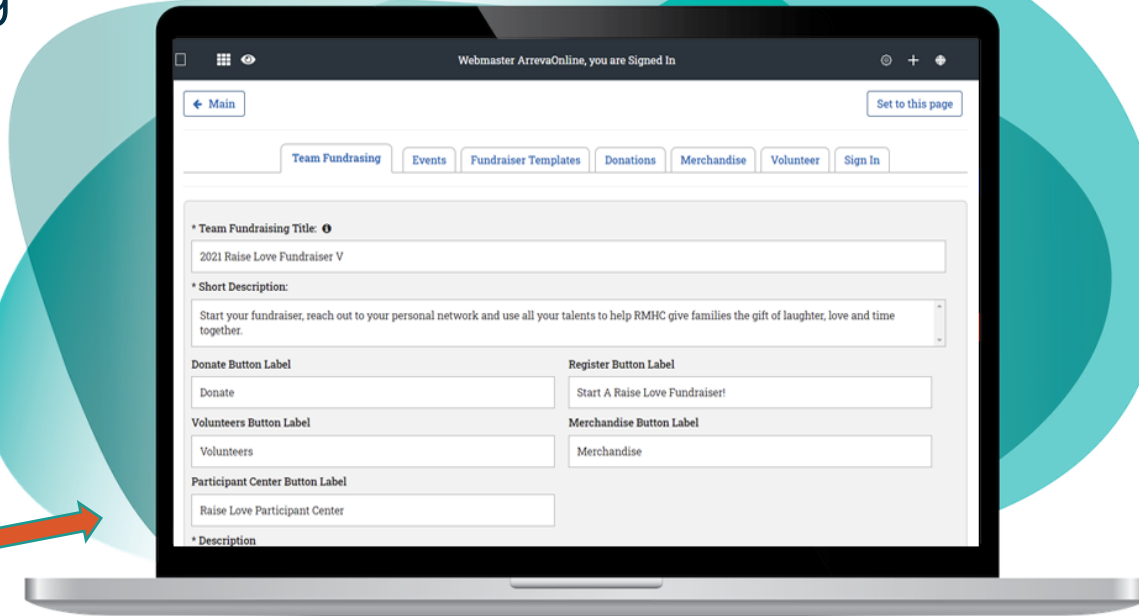
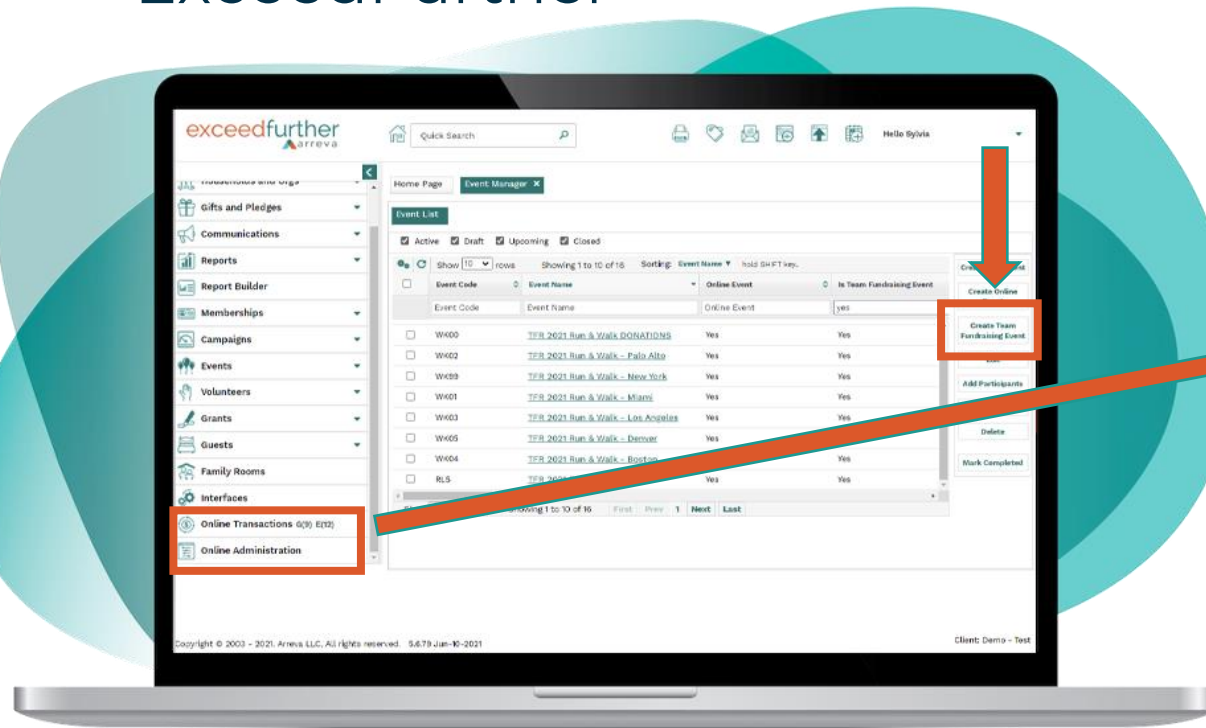
Team Fundraising: fundraise and give!

- For donors who just want to give, encourage them to support or sponsor their favorite team or participant
- Offer different options for the donation page including amounts with impact description and images
- Recurring, Fees, Tribute, etc



Team Fundraising: Easy Setup

- Always start by planning and creating your **Team Fundraising Event** in ExceedFurther



- Then go to Online Administration to personalize the Team Fundraiser for public use

ExceedFurther Team Fundraising

LOTS OF FEATURES!

- Virtual and/or Live Event
- One or multiple TFR events → different locations, different dates, different types of registrations, types of gifts
- Fundraising pages created automatically
- Flexible donation amounts to choose from (simple, single/multi select with images and/or descriptions and/or fund selection)
- Participant Center to modify personal page & teams

Important Questions

- Virtual and/or Live
- Multiple locations, different dates
- Participation options
- Results (reasons/funds)

- Goals
- Images
- Content
- Notifications

Step 1: Planning

1

Event(s) - DRM
Location, Dates, Reasons, Funds
REGISTRATION OPTIONS (TO's)
Create/Join/Independent

2

Team Fundraiser Setup - OL

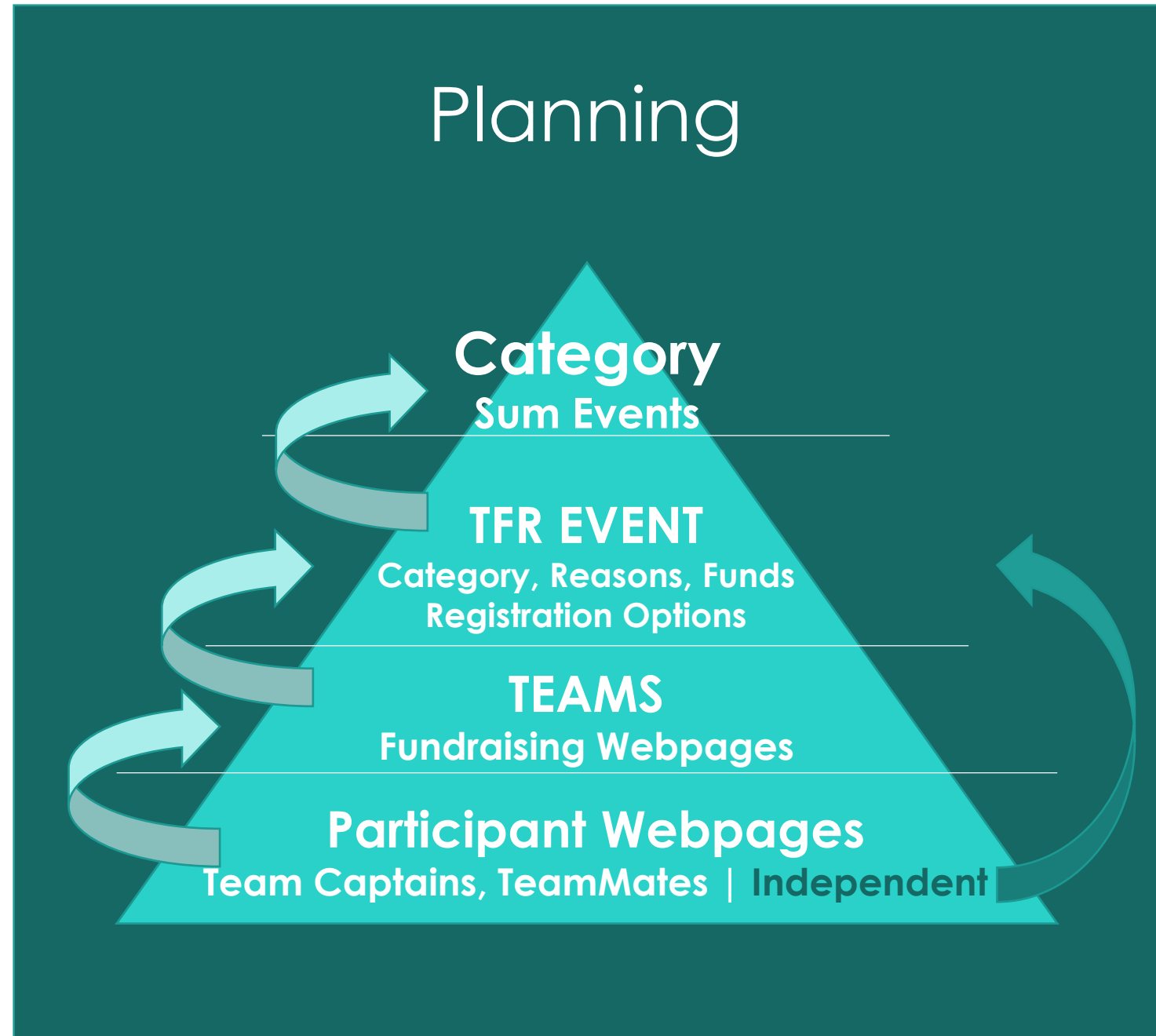
- TFR Defaults
- Team Fundraisers Template
- Participant Fundraisers Template
- Events
- Donation page

Planning the TFR event

is critical to determine

- if one TFR Event (or more)
- # Teams (limited or unlimited)
- # TeamMates per Team (limited or unlimited or none)
- Independent Participants (or none)

and if the event will repeat again ...



Events Start in Exceed Further DRM

- Create an Event Category
- Create Funds and Reasons (if needed)
- Create a TFR Event
- Add at least one ticketing option

Step 2: Event(s) in DRM

The screenshot shows a web browser window displaying the 'Create Team Fundraising Event' form. The form is divided into several sections and includes the following fields and options:

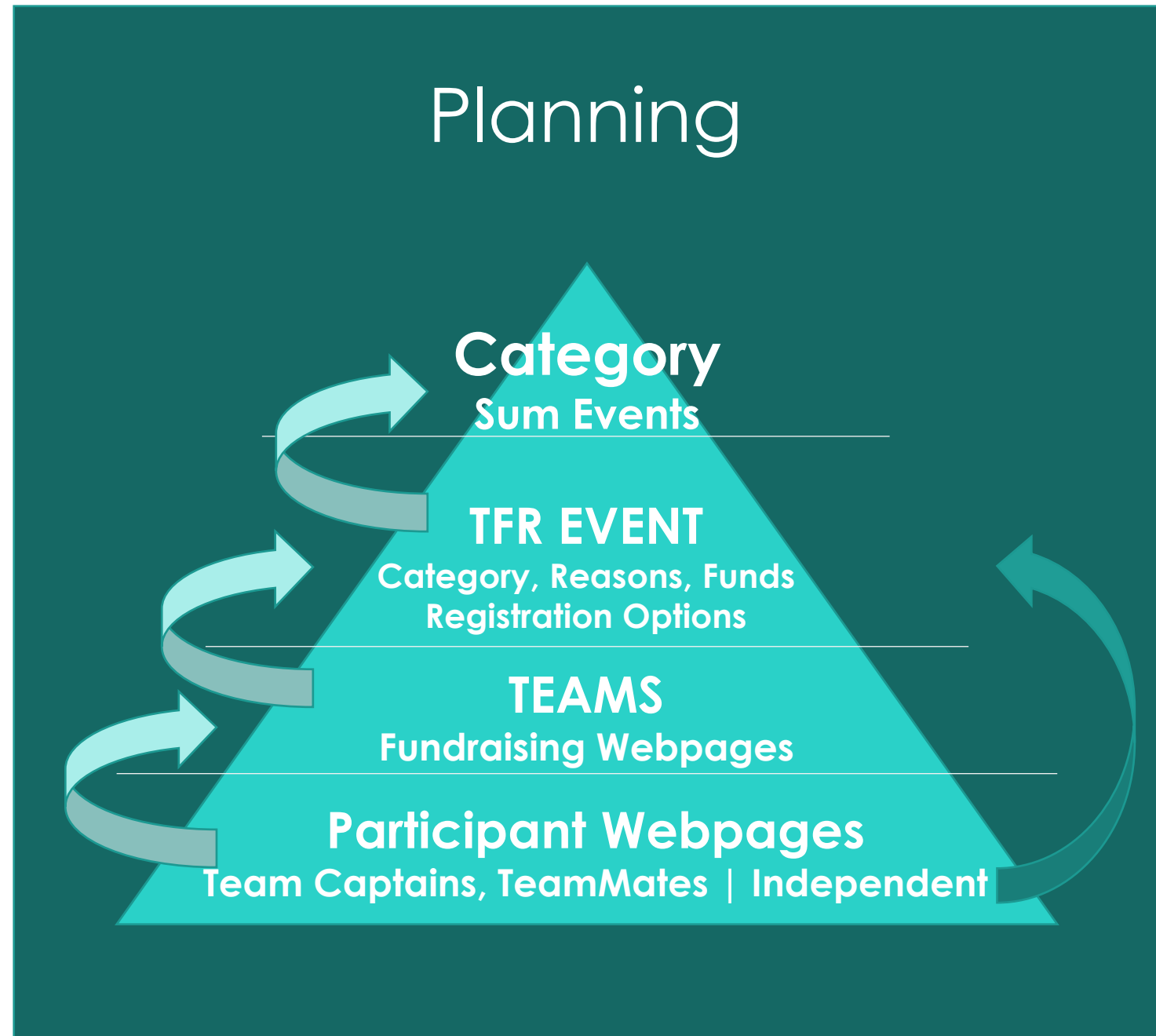
- Step 1: Event** (selected):
 - Copy From Other Event: TFR Walk LAX
 - Copy Event Main Info
 - Copy Group List
 - Copy Ticketing Options
 -
- Event Details:**
 - Event Code: TFRNYC (Max length is 6)
 - Event Name: TFR Walk NYC
 - Event Date: 11/06/2021
 - End Date: 11/06/2022
 - Location: Select
 - Capacity: 0
 - Do Not Add Participant:
 - No. of Volunteers Required: 0
 - Cost: 0.00
 - Goal: 0.00
 - Status: Active
 - Contact Person: [Search]
 - Comments: [Text Area]
- Online Event:**
 - Online Event
 - Category: TFR Team Fundraising Event
 - Reason: TFRW1 - TFR Walk01
 - Contribution Name: TFR Walk FLL
 - Reg. End Date: 11/05/2022
 - FB Share:
 - FB Share Text: Spread the word
 - Is Paid:
 - Allow Cancellations:
 - Allow Refunds:
- Address:**
 - Street 1: [Text Box]
 - Street 2: [Text Box]
 - City: [Text Box]
 - State: [Text Box]
 - Zip: [Text Box]
 - Country: USA
 - County: [Text Box]
- Buttons:** Save, Save & Next, Save & Close

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If more than one TFR Event needed, use the Copy Feature to generate the others. Adjust event reason as needed, and Ticketing Option Reason and Fund as needed

Option 1:

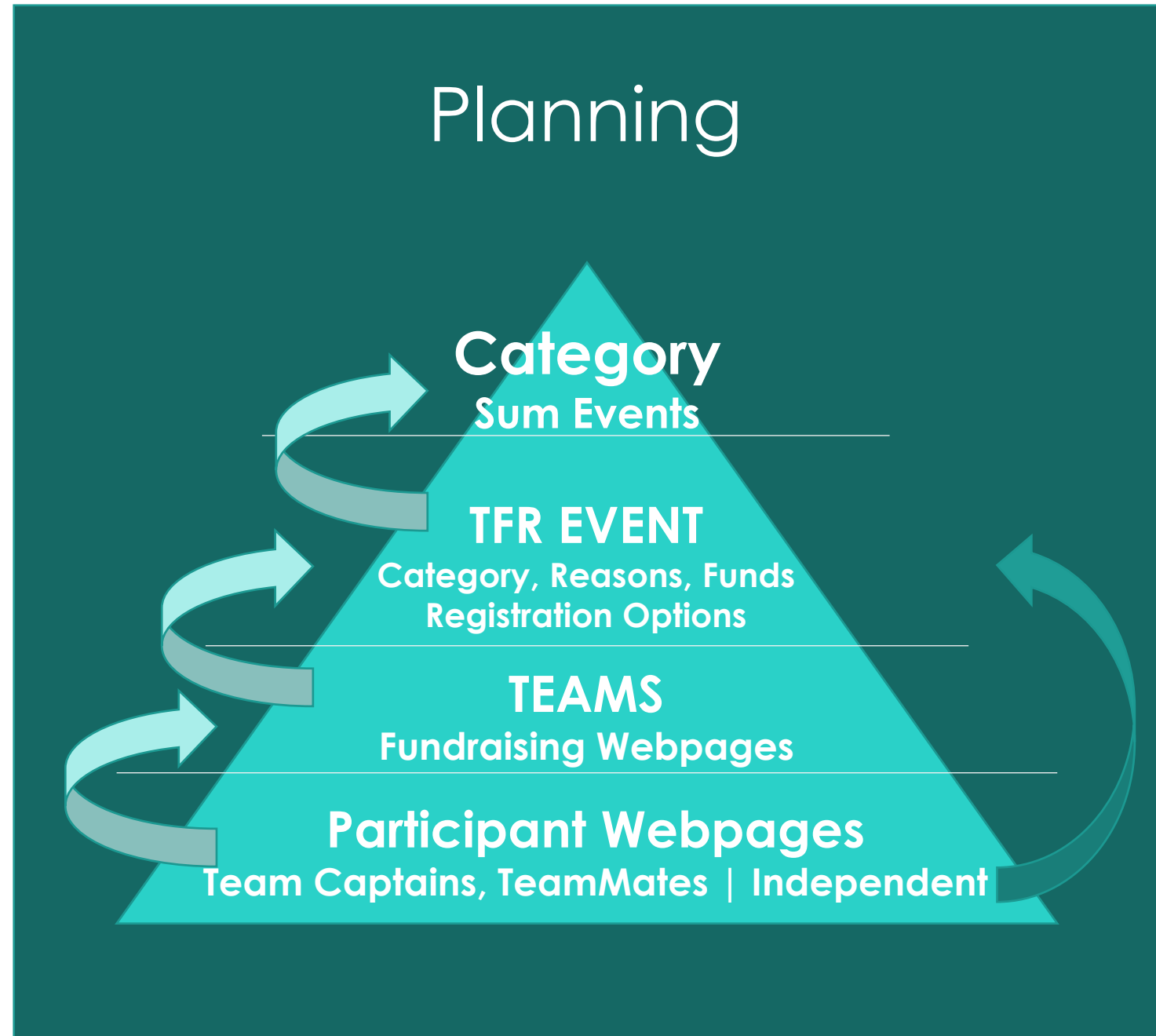
- 1 Event : n Teams
- Each Team to n TeamMates (optional)
- 1 Event to n Independent Participants (optional)



Option 2:

- n Event : n Teams
- Each Team to n TeamMates (optional)
- Each Event to n Independent Participants (optional)

This option when different locations, dates, different funds or a 3rd level of competition



Move to Online Admin for Setup

- TFR defaults & notif
- Add Event (s)
- Team & Participant fundraising templates & notifi
- Setup Donate & notif

Step 3: TFR Setup


The screenshot shows the 'Team Fundraising' setup page in the ArvevaOnline webmaster interface. The browser address bar shows 'Webmaster ArvevaOnline, you are Signed In'. The page title is 'Team Fundraising' and the main heading is 'Welcome To Team Fundraising'. A navigation menu is highlighted with a red box, containing links for 'Main', 'Team Fundraiser', 'Events', 'Fundraising Templates', 'Donate', 'Merchandise', and 'Sign In'. Below the navigation menu, there are buttons for 'Notifications', 'End Early', and 'Publish'. The main content area is titled 'Team Fundraising' and contains several form fields:

- Main Title:** Kindness Matters Team Fundraiser
- Short Description:** Start your fundraiser, reach out to your personal network and use all your talents to help us give families the gift of laughter, love and time together.
- Donate Button Label:** Make A Donation
- Register Button Label:** Start A Fundraiser
- Volunteers Button Label:** (Hidden)
- Merchandise Button Label:** (Hidden)

Ready?

- View & confirm all ok!
- Setup a dedicated page
- Launch & Promote using Tell A Friend, email, main website and encourage all participants to promote

Prepare To Launch



2022 District Schools Change Wars & Team Fundraising

[Donate To Your Favorite Class](#) [Join Your Favorite School Class & Start A Fundraiser](#)

All students are competing to collect the most change and online donations accepted. Classrooms from each grade across our district schools compete with classes from other schools to raise the most, including the change collected in the classroom.

Each class has setup a fundraising webpage you can support. To participate:

1. Click on the "Donate To Your Favorite Class" button above
2. Join your favorite school class team and create your personal fundraising webpage
3. Visit the active fundraisers below the Top Team Leaderbelow and select your favorite school/class to support it

The winning class will be honored with a march around the School Track, as well as braggin rights for the building/campus with the most funds raised.

[Get Started Now!](#)

\$ 3,185.00
Raised

Goal: \$25,000.00

When: Monday, November 15, 2021, 12:00 AM To Tuesday, November 15, 2022, 11:59 PM

Online Closes By: Tuesday, November 15, 2022, 11:00 PM

[Team Center](#)

[Share](#) [Tell A Friend](#)

Use Tell A Friend to promote!
Send to yourself and forward to all contacts.

Online Transactions

- Leaderboards and goal bar updated instantly as gift are entered
- Choose which leaderboards to show in Settings
- Prepare for manual entries by admin (is applies) to add other gifts show instantly

Leaderboards Updated Real-Time

Top Schools

Name	Raised	Goal	%
Eagles School	\$ 1,785.00	\$ 5,000.00	36%
Wild Cats School	\$ 1,050.00	\$ 5,000.00	21%
Lions School	\$ 350.00	\$ 5,000.00	7%

Top Class Teams

Name	Raised	Goal	%
Wildcats All Grades Mr. Robinson	\$ 1,050.00	\$ 1,000.00	105%
Eagles 1st Grade Ms. Melvin	\$ 997.50	\$ 1,000.00	100%
Eagles Kindergarten Ms. Margaritz	\$ 787.50	\$ 1,000.00	79%
Lions Kindergarten Ms. Lott	\$ 250.00	\$ 1,000.00	25%
Lions 1st Grade Ms. Fish	\$ 100.00	\$ 1,000.00	10%
Lions 2nd Grade Ms. Hupfer	\$ 0.00	\$ 1,000.00	0%

Top Participants

Name	Raised	Goal	%
Ken Robinson	\$ 525.00	\$ 1,000.00	52%
Paulie Thompson	\$ 525.00	\$ 1,000.00	52%
Vanessa Lott	\$ 250.00	\$ 1,000.00	25%
Megan Fish	\$ 100.00	\$ 1,000.00	10%
Heather Hupfer	\$ 0.00	\$ 1,000.00	0%
Chelsey Margaritz	\$ 0.00	\$ 1,000.00	0%
Ashley Melvin	\$ 0.00	\$ 1,000.00	0%

Support Your Favourite School's Class Team Now:

Teams

- Change Wars 2022 Team Wildcats All Grades Mr. Robinson**
Raised: \$ 1,050.00
Captain: Ken Robinson
Team: Wildcats All Grades Mr. Robinson
- Change Wars 2022 Team Eagles 1st Grade Ms. Melvin**
Raised: \$ 997.50
Captain: Ashley Melvin
Team: Eagles 1st Grade Ms. Melvin
- Change Wars 2022 Team Eagles Kindergarten Ms. Margaritz**
Raised: \$ 787.50
Captain: Chelsey Margaritz
Team: Eagles Kindergarten Ms. Margaritz

Participants

- Wildcats All Grades Mr. Robinson Participant Ken Robinson**
Raised: \$ 525.00
Participant: Ken Robinson
Team: Wildcats All Grades Mr. Robinson
- Wildcats All Grades Mr. Robinson Participant Paulie Thompson**
Raised: \$ 525.00
Participant: Paulie Thompson
Team: Wildcats All Grades Mr. Robinson
- Lions Kindergarten Ms. Lott Participant Vanessa Lott**
Raised: \$ 250.00
Participant: Vanessa Lott
Team: Lions Kindergarten Ms. Lott

Online Transactions in ExceedFurther DRM

All gifts from Team Fundraising (registrations + donations + fundraising pages donations) ready for matching & reporting!

Match & Report

The screenshot shows the ExceedFurther software interface. A red box highlights the 'Event' selection dropdown menu. Below it, a table lists transactions for the 'TFR Kindness Matters' event. A red arrow points from the table to a highlighted button labeled 'Online Transactions G(2) E(20) M(1)'.

Record ID	Event Name	Ticketing Option	Qty Bought	Gift Amount	Gift Assist
2859	TFR Kindness Matters	Start A Fundraiser - No Fee!	1.00	0.00	0.00
2860	TFR Kindness Matters	Add \$80 to give a family a room for a night	1.00	82.40	2.40
2864	TFR Kindness Matters	Start A Fundraiser - No Fee!	1.00	0.00	0.00

Online Transactions G(2) E(20) M(1)

If using more than one event, select the TFR events involved. Consider using a common Reason to facilitate reporting.

Team Fundraising

Enjoy!