How to Configure an Event in TeamRaiser

Approximate timestamps by topic

05:45 Step 1 – Identify TeamRaiser: Name, date, type

  10:25 Step 2 – Select Fundraising Options: form assignment, goal, personal gift badge

    14:15 Related Actions: Personal donation badge

15:58 Step 3 – Select Event Options: suggested goals, participant center, registration limits

    19:22 Related Actions: Event Questions

    22:10 Related Actions: Edit Advanced Options - Step 3a: Define Fundraising Options (offline gifts, # milestones, display options)

        22:55 Step 3b: Event Options (notification options. login step location, search options)

        29:40 Step 3c: Define Misc Options (intervals for Follow Up Autoresponders)

        32:26 Step 3d: Configure Participant Center Override Options

        33:05 Step 3e: Define OCI Options (not applicable for most instances)

        33:20 Step 3f: Configure eCommerce Options (not applicable for most instances)

34:07 Step 4: Select Team Options

        35:27 Related Actions: Team Captain Questions

36:07 Step 5: Team Divisions

36:54 Step 6: Associate Upsells (including Related Actions: Create a New Registration Upsell)

38:11 Step 7: Manage Participation Types

        7a: Identify Type (Edit existing or Create a New Participation Type): name, description, fee

        39:48 7b: Select Type Options: Availability

        40:05 7c: Select Registration Info: Constituent fields, opt in

        40:26 7d: Customize Waiver

        40:58 7e: Add Banner Image

        41:13 7f: Include Upsells

        41:32 7g: Include Questions

42:20 Step 8: Manage Milestones (Personal only show – your instance might also have Team Milestones)

45:36 Step 9: Manage Discounts

47:55 Step 10: Manage Stationery

48:15 Step 11: Manage Autoresponders

50:10 Step 12: Customize Suggested Messages (participant center email templates)

51:10 Step 13: Customize Pages – TeamRaiser Pages and Custom Pages

52:10 Step 14: Customize Event URLs

53:00 Step 15: Test Drive

54:32 Step 16: Configure Cross References (not applicable for all instances)

55:09 Step 17: Publish