

Training

Last Modified on 05/05/2023 10:41 am PDT

Learn about your GiveSmart Fundraise account to make the most of it!

Note: If you are interested in personalized training, please contact your account manager or Services to discuss pricing.

The **GiveSmart Fundraise Fundamentals** series of training sessions take you through the most common usage of a GiveSmart Fundraise account, through four different sessions throughout the week.

The **GiveSmart Fundraise Intermediate** series of training sessions build on the Fundamentals with four additional sessions throughout the week, so you can make the most out of your GiveSmart Fundraise account.

Fundamentals Classes

Fundamentals 101:

Navigation and Reporting

Get to know your GiveSmart Fundraise account! We'll take a tour of the application, discuss ways to use the different functions within your account and how you can see the health of your accounts from the dashboard, within a campaign and through reporting. We will define specific phrases and concepts to get you comfortable using your [account](#).

Recording

Fundamentals 102:

Donation and Event Activities

The Donation and Event Activities class will take you through the design process of the most common activity in GiveSmart Fundraise, the Text to Donate activity, and show you how you can apply that knowledge to personalizing your [other](#) forms.

Recording

Fundamentals 103:

Crowdfunding and Peer-to-Peer Fundraising

Build a Fundraising page where your supporters can volunteer to fundraise for you as individuals and in teams. Build a Sign-Up form and learn about the many options to tailor your activities to fit your Crowdfunding and Peer-to-Peer Fundraising [campaign](#).

Recording

Fundamentals 104:

Texting and Communication

Learn how to leverage Texting to reach more of your supporters. We'll discuss strategies for messaging and lists of supporters and take you through the process of [sending](#) text messages.

Recording

Intermediate Classes

While not required, it is highly recommended that you have completed the Fundamentals before attending the Intermediate classes. These classes presume that you have a working knowledge of your GiveSmart Fundraise account.

Intermediate 201:

Beyond the Basics

In the Fundamentals classes, we describe a few ways to personalize your forms. In this session, we will dive deep into using custom elements and sections to enhance your existing forms and expand your reach. We'll show several features through the design of different styles of forms.

Recording

Intermediate 202:

Ticketing

You're planning your event and you want to sell tickets? This class is for you. We will guide you through the design of the GiveSmart Fundraise Ticketing activity and what it has to offer. We'll show how your supporters will purchase tickets, and assign tickets to people in their party. And we'll guide you through the check-in process when the big day comes, so you can manage your supporters, your tickets, and your volunteers.

Recording

Intermediate 203:

Event Page

The Event page is a standalone web page with a singular focus created specifically for an event. It is where visitors land after clicking on an email, ad, web search or social media link about your event. It provides key information about the event in one location that is easy to access and view. Use the event page for live [streaming](#) your virtual event, providing details and videos about your in-person event or anything else you need.

Recording

Intermediate 204:

Analytics & Reporting

To learn more about the powerful capabilities of Reporting & Analytics, this class will dig in and help you uncover uses of the tools you already have access to. In the training we will: look at analytics beyond the campaign dashboard, uncover reporting functionality you may not be using,

reveal how to review reports to maximize your [campaign](#) insights and more.

Recording