

Quick Start Account Checklist

Last Modified on 06/02/2022 12:36 pm PDT

You just signed up with GiveSmart Fundraise. Your event is days away. Here are the absolute basics you need to get ready for your even. Click the buttons to be taken to the instruction pages:

1. **Do This** **Create a Merchant Account.**
 - You need a way to collect those donations in your account. This is, by far, the thing you should be working on immediately. Without a merchant account attached to your GiveSmart Fundraise account, you can't receive payment.
2. **Do This** **Create a Donation page with a Keyword.**
 - The Text to Donate activity will create your Donation page for your event. You can use this anywhere you want, and as you create it, you will be given a link to the page, a short link suitable for sharing to social media, texting, etc. But more importantly, you will also create a Keyword that people can text to so they can simply use their phones at your event to initiate the giving process themselves.
3. **Do This** **Personalize your Event Thermometer.**
 - As part of the Text to Donate process, you can create a Fundraising Thermometer suitable for projection at your event as you ask for donations. This Thermometer / Donor Acknowledgement page significantly enhances your event allowing donors to see their name and donation amount on screen.
4. **Do This** **Review the Event Kit.**
 - The Event Kit hub contains everything from Table Tents for you to personalize, print out and distribute around your event with simple donating instructions, to slides with information, to scripts that you can read to help your supporters donate and participate during your event.
5. **Do This** **Take some Training.**
 - We know you're in a hurry. Check out our training courses to take you through various aspects of your GiveSmart Fundraise account to help clarify any questions you may have about your activities and more.