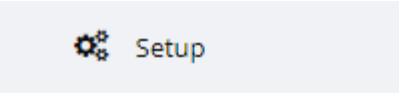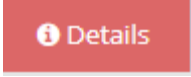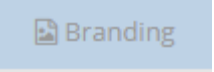# Build a Team Event

Once logged into the Swell dashboard, follow these steps:

1. To create an event, click on the ➕ icon in the top right corner
2. Click Save
3. Click on the Event Name you would like to build / edit
4. Click on the **⚙ Setup** tab on the left
5. You will start on the **ⓘ Details** icon
   a. Fill out the Who portion for your campaign
      i. Nonprofit Name
   b. Fill out the What portion for your campaign
      i. Event Name
      ii. Description for fundraising pages- this is a description that will appear on the personal fundraising pages for those who are fundraising for you. This is typically filled in with a description of why someone should give or what their donation would be supporting.
   c. Fill out the When portion for your campaign
      i. Day
      ii. Time
      iii. Venue **if this is a virtual event, you can always type "Virtual Event" or "Join Us Online" in the place of a physical venue**
6. Click Save changes
7. Next, click on the **🖼 Branding** icon
   a. Upload an Event Page Header Image
      i. Size: 740x288 jpeg

        ii.   This image will be found on the homepage of your site and donation page

        iii.   These images can be created on a site like Canva (whatever you use)

    b. Profile Page Header Image

        i.   Size: 740x288 jpeg

        ii.   This image will be found on the personal fundraising pages

    c. Logo Image

        i.   Size: 261x16 jpeg

        ii.   This image will be found in the top right corner of your homepage

    d. Email Header Image

        i.   Size: 550x135 jpeg

        ii.   This image will be found on the email receipts donors receive

    e. Ticket Header Image

        Size: 550x135 jpeg

        This image will be found on the top of the pdf ticket attached to the ticket confirmation email

    f. Ticker Footer Image

        Size: 800x450 jpeg

        This image will be found on the bottom of the pdf ticket attached to the ticket confirmation email

8. Scroll all the way down and click Save changes

9. Next, click on the [Content] icon

    a. To edit the homepage content, click on the [edit] icon. In this section, you will want to upload any information a guest needs to know when visiting the site. You can use text, upload images, upload videos, and more.

    b. Click on the [+] in the top right to add more content pages/tabs to your site

    c. When editing tabs:

        i.   Fill out a Page url- this is the text that will go at the end of your campaign site link to take you straight to this content tab (only use one word).

        ii.   Fill out a Tab Name- this is the name of the tab that will show up on your site. For example, if you created an 'about' content page, you could name the tab "About"

        iii.   Check the box active to make the tab visible to the public

        iv.   Once you are done building your content page, scroll down and click Save

10. Click on the [Products] icon

    a. Click on the [+] in the top right corner to create a ticket (a ticket must be created first because each member of the team receives a ticket)

b. Select Ticket in the drop-down under Product Type
c. Check the active box to make the ticket visible and available to purchase from the public
d. If you do not want the ticket available to the public but want it available for use, check active and hidden
e. Fill out the maximum number of tickets available for the event
f. Fill out the Name of the ticket
g. Fill out the price of the ticket
h. Click Save

11. After creating a ticket, you are now able to create a team.

   a. Click on the in the top right corner to create a team
   b. Select Team in the drop-down under Product Type
   c. Check the active box to make the team available to the public and available to purchase
   d. Fill out the maximum number of teams available for the event
   e. Fill out the name of the team
   f. Fill out the price of the team
   g. Fill out how many tickets (people) per team
   h. Optional: add a description of what is included in the team purchase
   i. Click Save

12. Click on the **f Social Networks** icon
   a. Facebook page ID- this will allow your Facebook posts to pull through at the bottom of your campaign site
   b. Twitter Username- this will allow your Twitter posts to pull through at the bottom of your campaign site
   c. Hashtag-Try to create a clever hashtag that is relevant to your campaign. Posts will pull through at the bottom of your campaign site when your organization or anyone else posts on social media with this hashtag.
   d. Tweet Donations- check the box if you would like our system to do this. Every time someone makes a donation our system will automatically send out a tweet thanking them for their donation.
   e. Click Save Changes

13. Click on the **Sponsors** icon
   i. This is the area you would use to highlight and recognize sponsors. This will show up on every page of your campaign site under the raised amount. If you have more than one sponsor it will continuously scroll through them on a loop.

   ii. Click on the in the top right corner to add a sponsor

<div style="padding-left: 3em;">
iii.   Type in the sponsor name

iv.   Upload a logo image for the sponsor

v.   Click Save
</div>

14. Click on the **Comps** icon **IF** you are sending sponsors tickets

    a. Click on the ➕ in the top right corner to send sponsors their tickets

    b. Fill out the Comp Ticket Code. This is typically the company name.

    c. Click on the drop-down to select the ticket type they are receiving

    d. Fill out how many tickets they are receiving

    e. Filling out the Internal note is optional (This is just for you. Typically name of sponsorship)

    f. Fill out the first name, last name, and email address of contact receiving tickets

    g. Click **Save ✉** or **Save 🚫✉**
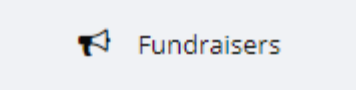
        i.   Save with envelope will automatically send contact the tickets

        ii.   Send with no envelope will not send them tickets

15. Click on the **Settings** icon

    a. This is where you will be able to customize and add features to your donation page (the give now button takes you to this page on your campaign site), ticketing checkout page, buttons, and sponsorship checkout page.

    b. If you would like your fundraisers (walk participants) to get credit for donations, make sure the gift crediting feature is enabled in your donation page settings.
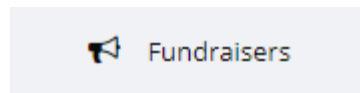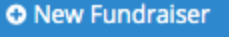
16. Click on the **Fundraisers** tab on the left side

    a. This is where you would manually add people as fundraisers. We can also add a "Become a Fundraiser" button on your campaign site if you would rather them sign up on their own.

    b. Click on the ➕ in the top right corner to add someone

    c. Type in their information and click Save

    d. Click on the ✉ to the right of the individual's name to send them an email with their personal fundraising link

Once your event is underway, you may find the Transactions, Tickets, and Tables/Teams sections useful. Here's how to access them and what you'll find in each:

17. Click on the **$ Transactions** tab at the bottom on the left
    a. This is where you are able to see all donations made

    b. You can manually add a donation if you receive cash or a check. Click the ➕ in the top right corner and add the donor information. Click Save

    c. Click on the ☁ in the top right corner to download an excel file with a report of all of your transactions.
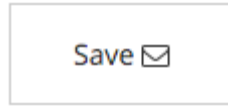
18. Click on the **◈ Tickets** tab to see tickets purchased and manually send tickets
    a. This tab will show everyone who has purchased a ticket from the event site
    b. Manually send a ticket if someone sends a check or cash for a ticket

        i. Click on the ➕ in the top right corner to create the ticket
        ii. Create the ticketed guest as a fundraiser by clicking the **⊕ New Fundraiser** icon
        iii. Fill out the individual's first name, last name, and email address. Click Save
        iv. Select the ticket product the individual purchased
        v. Click Save & Send to Guest to automatically send guest email with ticket
        vi. Click Save to not send an email to the guest

19. Click on the **👥 Tables/Teams** tab to see teams purchased and manually create teams
    a. This tab will show everyone who has purchased a team from the event site
    b. Manually create a team if someone sends a check or cash for a team

        i. Click on the ➕ in the top right corner to create the team
        ii. Fill out the name of the team
        iii. Select the type of team purchased in the drop-down
        iv. Fill out the individual who purchased the team's first name, last name, and email address

v. Click the dot next to, "Will the host be participating in the event and require a ticket?" if the individual who purchased the team is on the team as well.

vi. Click [Save ✉] or [Save 🚫✉]
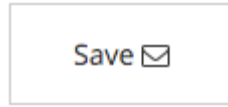
vii. Once saved, add individuals to the team by clicking on the number of seats