

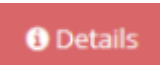
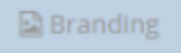




# Build a Walk Event

Once logged into the Swell dashboard, follow these steps:


- To create an event, click on the  icon in the top right corner
- Click Save
- Click on the Event Name you would like to build / edit
- Click on the  tab on the left
- Start on the  icon
  - Fill out the Who portion for your event
    - Nonprofit Name
  - Fill out the What portion for your event
    - Event Name
    - 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.
  - Fill out the When portion for your campaign
    - Day
    - Time
    - Venue \*\*if this is a virtual event, you can always type “Virtual Event” or “Join Us Online” in the place of a physical venue\*\*
- Click Save Changes
- Next, click on the  icon
  - Upload an Event Page Header Image
    - Size: 740x288 jpeg
    - This image will be found on the homepage of your site and donation page
    - These images can be created on a site like Canva (whatever you use)

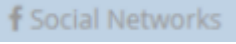
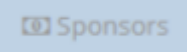

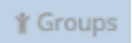

- Profile Page Header Image
  - Size: 740x288 jpeg
  - This image will be found on the personal fundraising pages
- Social Media Preview Picture
  - Size: 1080x565 jpeg
  - This image will appear when someone shares your link
- Logo Image
  - Size: 261x166 jpeg
  - This image will be found in the top right corner of your homepage
- Email Header Image
  - Size: 550x135 jpeg
  - This image will be found on the email receipts donors receive
- Ticket Header Image
  - Size: 1000x245 jpeg
  - This image will be found on the top of the pdf ticket attached to the ticket confirmation email
- Ticket Footer Image
  - Size: 1000x760 jpeg
  - This image will be found on the bottom of the pdf ticket attached to the ticket confirmation email
- Scroll all the way down and click Save Changes

- Next, click on the  icon

- To edit the homepage content, click on the  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.
- Click on the  in the top right to add more content pages/tabs to your site
- When editing tabs:
  - 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).
  - 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"
  - Check the box active to make the tab visible to the public
  - Once you are done building your content page, scroll down and click Save

- Click on the  icon

- Click on the  in the top right corner to create a ticket
- Select Ticket in the drop-down under Product Type
- Check the active to make the ticket visible and available to purchase from the public

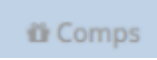

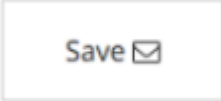





- Fill out the maximum number of tickets available for the event
- Fill out the Name of the ticket (ex: Individual Ticket)
- Fill out the price of the ticket
- Click Save
- Click on the  icon
  - Facebook page ID- this will allow your Facebook posts to pull through at the bottom of your campaign site
  - Twitter Username- this will allow your Twitter posts to pull through at the bottom of your campaign site
  - 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.
  - 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.
  - Click Save Changes
- Click on the  icon
  - 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.
  - Click on the  in the top right corner to add a sponsor
  - Type in the sponsor name
  - Upload a logo image for the sponsor
  - Click Save
- Click on the  icon to create a team for your walk event.
  - Click on the  in the top right corner to create a team
  - Click Save

**\*\*One team has to be created for the drop-down to appear on the ticket checkout page\*\***

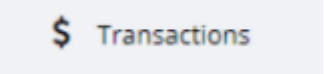

SELECT YOUR TEAM (OPTIONAL)


▼


**\*\*IF you are not adding all of the teams manually, you will need to ask support at Swell to turn on the feature where individuals have the ability to create their own team when they are purchasing their ticket or registering\*\***




- Click on the  icon **IF** you are sending sponsors tickets
  - Click on the  in the top right corner to send sponsors their tickets
  - Fill out the Comp Ticket Code (This is typically the company name)
  - Click on the drop-down to select the ticket type they are receiving
  - Fill out how many tickets they are receiving
  - Filling out the Internal note is optional (This is just for you. Typically name of sponsorship)
  - Fill out the first name, last name, and email address of contact receiving tickets
- Click  or 
  - Save with envelope will automatically send contact the tickets
  - Send with no envelope will not send them tickets
- Click on the  icon
  - 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.
  - 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.
- Click on the  tab on the left side
  - This is where you would manually add people as fundraisers (walk participants). We can also add a “Become a Fundraiser” button on your campaign site if you would rather them sign up on their own.
  - Click on the  in the top right corner to add someone
  - Type in their information and click Save
  - Click on  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 and Tickets sections useful. Here's how to access them and what you'll find in each:

- Click on the  tab at the bottom on the left
  - This is where you are able to see all donations made
  - 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

- Click on  in the top right corner to download an excel file with a report of all of your transactions.

 Tickets

- Click on the  tab to see tickets purchased and manually send tickets
  - This tab will show everyone who has purchased a ticket from the event site
  - Manually send a ticket if someone sends a check or cash for a ticket
    - Click on the  in the top right corner to create the ticket
    - Create the ticketed guest as a fundraiser by clicking the  icon
    - Fill out the individual's first name, last name, and email address. Click Save
    - Select the ticket product the individual purchased
    - Click Save & Send to Guest to automatically send guest email with ticket
    - Click Save to not send an email to the guest