

## Peer-to-Peer Setup Checklist

Setting up a new peer-to-peer campaign with Qgiv by Bloomerang? Use this checklist to help make your campaign a success!

- (Optional) Create a new peer-to-peer form: If you'd like to start with a brand-new peer-to-peer form, you can **clone an existing form** on the Form Management page in your Qgiv account.

**Campaign Settings:** Be sure to configure these settings for your new campaign.

- Registration Settings
  - Enable Non-Fundraising Participants** if you want people to be able to attend or participate in your campaign without raising money. Those registrants will not have their own fundraising pages.
  - Enable Additional Participants** if you'd like registrants to be able to register others. A great use-case is for parents who want to register their children. You can also allow the primary participant to manage their additional participants' fundraising pages!
  - Make sure **Optional One-Time Donation** is enabled!
  - Enable Classifications** if you'd like to segment your peer-to-peer participants into more specific groups, such as Location, Age, etc.
- Fundraising Settings
  - Determine whether to **Allow fundraising participants to see anonymous donor information**. This information is never shared publicly, but when enabled, fundraisers will be able to see donors' names and gift amounts.
  - Enable Fundraising Commitments** if you want to require participants to commit to raising a minimum amount. When enabled, you can require Fundraising Commitments for specific registration packages.
- Goals and Thermometers
  - Decide what you'd like to include in your **fundraising thermometers**, including registration fees, GiftAssist, and more!
- Campaign Alias
  - You can **customize** part of your campaign URL, but don't change the Alias after you start sharing the link!

**Registration Setup:** This is where you'll configure some settings that are specific to campaign registration.

- Categories
  - Add Categories:** Participants need at least one category to register.
  - Early Bird discounts:** If you'd like to charge different amounts based on when participants register, make sure to set up custom registration fees for each category.
- (optional) Classifications
  - If you've enabled Classifications, **set up the segments** you'd like to use and configure each Classification's **settings**.

- Promo Codes
  - Set up some promo codes** if you'd like to offer package discounts.
- Custom Fields
  - Add some custom fields** if you'd like to gather additional information during registration. Keep registration streamlined by adding only the fields you absolutely need.

**Donation Setup:** This is where you'll configure some settings that are specific to campaign donations.

- Donation Settings
  - Enable Employer Matching Gifts** if you'd like to give donors the option to see if their gift can be matched.
    - If you have a Double the Donation or HEPdata account, you can set up an integration with one of those services.
  - Configure Recurring Settings** to determine which recurring frequencies should be available to donors and to decide whether donors should be able to specify start and end dates for their ongoing gifts.
  - Review** Additional Conversion Opportunities.
- Donation Amounts
  - Configure the amounts** you'd like to offer.
    - Amounts can have optional names, descriptions, and images. You can also offer different amounts for one-time versus recurring donations.
- Fields
  - Review** System and Billing Fields and **add** custom fields if you need them.
  - Make sure you **display** the fields you need and **hide** the ones you don't.

**Campaign Builder:** Before you start sharing your campaign site, jump into Campaign Builder to make sure it looks the way you want.

- Set the **Primary Color** for the site's Theme.
- Add a **Banner Image** and/or **Campaign Avatar**.
- Configure your **widgets**.
- Set up the **Participant Fundraising Page** and determine which widgets participants will be allowed to edit.

**Peer-to-Peer Reports:** We recommend these reports to get the data that matters!

- Peer-to-Peer **Donations**
- Peer-to-Peer **Store**
- Peer-to-Peer **Participants**