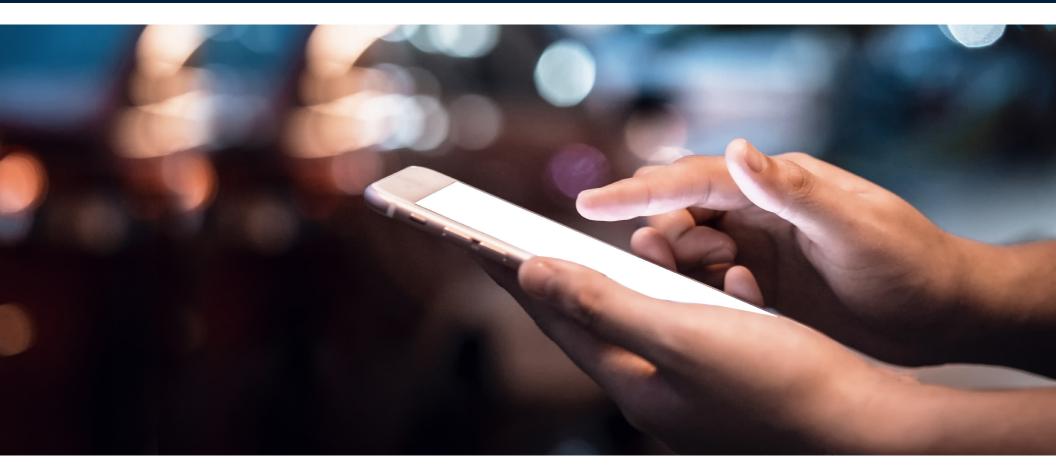
# text2fund

# Optimization Guide





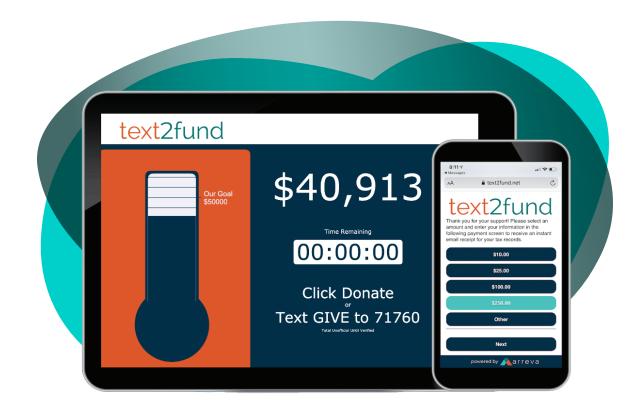
# text2fund **Optimization Guide**

Home
During Campaign
After Campaign
Next Steps
Questions



# Let's Optimize Your Text2Fund Campaign

Follow these easy steps to optimize your Text2Fund mobile fundraising campaign and elevate your fundraising.



# Get to Know the Campaign Manager

The Text2Fund Campaign Manager is split into four different tabs/areas: Home, Before Campaign, During Campaign and After Campaign. Each area (except Home) is split into different sub-tabs, and each sub-tab link will have options and input fields to make changes to your campaign. Throughout this software guide, we will reference how to make changes to your campaign by providing the path via the area and sub-tab, as Before Campaign (tab) > Advanced (sub-tab) > Mobile Theme Options (specific link)

### Track and Monitor via Dashboard

The campaign dashboard is on the "Home" tab located on the top left of the Text2Fund Campaign Manager. Use the Campaign Setup Tasks list to verify all the important setup tasks have been completed. Use the Campaign Summary box to view important fundraising statistics related to your campaign in real time. Use the Manage & Monitor Campaign list to view important reports related to your campaign.



## During Campaign

	Arreva Can During Campaign	at 10/29/2016 of we	elcome dfiske@maestrosoft.com Home Event: 427 - Text2Fu	DO n Log Out nd Demo
During	The Campaign			
Manage	Monitor Donation Displays	s Support		
• <u>List</u> • <u>Rano</u>	<u>v Donations</u> <u>Participants</u> Idom Prize / Door Prize Inually Send Message to All Particip	<u>pants</u>		
		© 2020 Arreva LLC		

Next Steps

Questions

# During Campaign > Manage > View Donations

You may sort current campaign donations by each header and conduct a search. Export this report to Excel by using the "Click here to export data in Excel compatible format" link at the top of the report.

100				Total F	<b>J11133.0Z</b>
text2fu				Campaig at 10/29/2016 8:00	0 PM PST UU.UU.UU
Aarr			paign Mana	ager	ome dfiske@maestrosoft.com Log Out Home Event: 427 - Text2Fund Demo
Home Before Ca	mpaign	During Campaign	After Campaign A	dmin Functions Help	Message Center Reports
States					
Donation L	ist - a	II Times F	Pacific		
Click here to export data	in Excel comp	atible format. Filenan	ne will be: pmt_notices-2020	1012-153318.xis	
Show 50 • entries			and the second se		Search:
Date	Donor ID	Phone Number	Name	Amount	
2015-08-22 11:19:00	and the second se	DEMO-70709	Lenny Falcon	100.00	â de la companya de la
2015-08-26 12:58:07		DEMO-70709	John Monroe	10.00	
2015-08-26 12:58:43		DEMO-70709	Peggy Claywell	100.00	
2015-08-26 12:59:26		DEMO-70709	Jason Johnson	250.00	
2015-08-26 13:00:12	138	DEMO-70709	Petra Eckles	15.00	E
2015-08-20 13:00:12		DEMO-70709	Tom Roberts	10.00	
2015-08-26 13:00:57		DEMO-70709	John Stewart	10.00	
	138				
2015-08-26 13:00:57	a provincia de la companya de	DEMO-70709	Alan Tan	250.00	
2015-08-26 13:00:57 2015-08-26 13:01:37	138	DEMO-70709 DEMO-70709	Alan Tan Vera Scarlett	250.00 250.00	
2015-08-26 13:00:57 2015-08-26 13:01:37 2015-08-26 13:02:23	138 138				
2015-08-26 13:00:57 2015-08-26 13:01:37 2015-08-26 13:02:23 2015-08-26 13:07:21	138 138 138	DEMO-70709	Vera Scarlett	250.00	
2015-08-26 13:00:57 2015-08-26 13:01:37 2015-08-26 13:02:23 2015-08-26 13:07:21 2015-08-26 13:09:10	138 138 138 138 141	DEMO-70709 DEMO-70709	Vera Scarlett Carol Clemens	250.00 25.00	
2015-08-26 13:00:57 2015-08-26 13:01:37 2015-08-26 13:02:23 2015-08-26 13:07:21 2015-08-26 13:09:10 2015-09-02 08:21:05	138 138 138 138 141 157	DEMO-70709 DEMO-70709 DEMO-70720	Vera Scarlett Carol Clemens Bret Benford	250.00 25.00 0.01	
2015-08-26 13:00:57 2015-08-26 13:01:37 2015-08-26 13:01:37 2015-08-26 13:02:23 2015-08-26 13:07:21 2015-08-26 13:09:10 2015-09-02 08:21:05 2015-09-10 14:35:11	138 138 138 138 141 157	DEMO-70709 DEMO-70709 DEMO-70720 DEMO-75388	Vera Scarlett Carol Clemens Bret Benford Jerry Rainer	250.00 25.00 0.01 100.00	

# During Campaign > Manage > List Participants

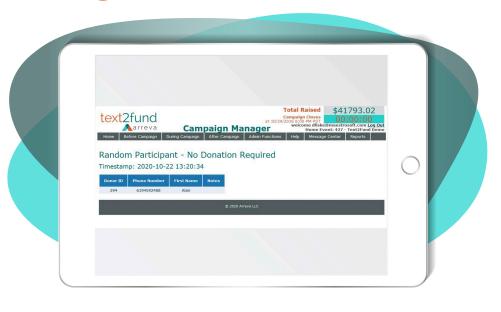
Display and sort current participants in your campaign by each header and conduct a search. Export this report to Excel by using "Click here to export data in Excel compatible format" link at the top of the report.

You can also send an individual text to a participant by clicking the phone icon next to their record. Participants with a First and Last name showing have completed a donation. Participants without a name have sent the keywork text but have not completed a donation.

text2fund arreva Home Before Campaign During C	Campaig Tampaign After C	n Manag ampaign Admin	Campa at 10/29/2016 8	lcome dfiske@mae Home Event: 42	27 - Text2	:00 com <u>Log Out</u> Fund Demo	
Donor List Click here to excert data in fixed compatible form Show 50 • entries Actions	Donor A Sea	<u>u biddars-2020101P3</u> Phone Number	First Last	Search		User Data	
■ + ■ < Ø ○	Number <sup>364,</sup>	555555555	Name Name	REGISTERED	79	NO_OPEN	
D 🖕 🕂 🖪 🔍 🖉 🛇	103 1	5555551122	Vera Scark	ett REGISTERED	34	NO_OPEN	
P 🖕 🕂 🖬 🔍 🖉 😒	104 1	555555555		STOPPED	77	USER_RE	
1			-			-	

#### During Campaign > Manage > Random Prize / Door Prize **Conduct** a Prize Drawing

You may randomly draw 1 participant from your list of participants. Each time you click this link, a different participant is randomly drawn. Entice donors to participate by texting your keyword to 71760 to be automatically entered into a random drawing. Offer a prize to any participants in your campaign, and then use this screen to draw a winner or multiple winners.



#### During Campaign > Manage > Manually Send Message to All Participants Send Text Messages to Participants

Use this feature to keep your participants engaged and updated throughout your campaign by sending mass text messages. This is a great way to promote your campaign, invite supporters to participate, send campaign success updates and ask for donations.



#### During Campaign > Monitor View Reports and Analytics

All links in this tab are for different campaign reports you can use to track the process and success of your campaign. Please review each link. Most reports can be exported to Excel.





#### During Campaign > Donation Displays **Thermometer Displays**

There are two different thermometer display styles. Each style has four different sizing options. Thermometer displays are an excellent visual to use during a broadcast, presentation, speech, or at an event.

The thermometer shows potential donors how much has been raised and how close you are to reaching your goal. This will create excitement for your campaign and encourage potential donors to text your keyword to 71760 to make a contribution.



## After Campaign

text2ful Aarr Home Before Ca	eva Campa	at 10/29/2 aign Manager After Campaign Admin Functions	ampaign Closes 016 8:00 PM PST 000 welcome dfiske@maestr Home Event: 427 Help Message Center	:00:00 psoft.com Log Out Text2Fund Demo Reports	
After the C	ampaign				
Reports					
Donor Sum	ographic Data mary Report Invoices (requires pdf reader)	1			
		© 2020 Arreva LLC			
	1				

#### After Campaign > Reports > List Donations Final Campaign Donations

This report will show the final campaign donation list. It includes a timestamp of when the donation was made, amount of donation, name and email address of donor. The report can be exported to Excel.

tex	t2fund		Camp	aign M	at 10/ anager		793.02 00:00 oft.com Log O rext2Fund Den
Home	Before Campaig	n During C	ampaign	After Campaign	Admin Function	ns Help Message Center	Reports
	tions		Donor				Reference
ID	Timestamp	Amount	ID	Name	Phone	Email	ID
2487	2015-08-22 11:19:00	\$100.00	ID 138	Lenny Falcon	DEMO-70709	Email Lenny.Falcon@text2fund.net	ID 2-DEMO-
1000	2015-08-22			Lenny			1D 2-DEMO- 1440267540 2-DEMO-
2487	2015-08-22 11:19:00 2015-08-26	\$100.00	138	Lenny Falcon John	DEMO-70709	Lenny.Falcon@text2fund.net	10 2-DEMO- 1440267540 2-DEMO-
2487 2490	2015-08-22 11:19:00 2015-08-26 12:58:07 2015-08-26	\$100.00 \$10.00	138 138	Lenny Falcon John Monroe Peggy	DEMO-70709 DEMO-70709	Lenny.Falcon@text2fund.net John.Monroe@text2fund.net	1D 2-DEMO- 1440267540 2-DEMO- 1440619087 2-DEMO- 1440619123 2-DEMO-
2487 2490 2491	2015-08-22 11:19:00 2015-08-26 12:58:07 2015-08-26 12:58:43 2015-08-26	\$100.00 \$10.00 \$100.00	138 138 138	Lenny Falcon John Monroe Peggy Claywell Jason	DEMO-70709 DEMO-70709 DEMO-70709	Lenny.Falcon@text2fund.net John.Monroe@text2fund.net Peggy.Claywell@text2fund.net	1D 2-DEMO- 1440267540 2-DEMO- 1440619087 2-DEMO- 1440619123 2-DEMO- 1440619166 2-DEMO-
2487 2490 2491 2492	2015-08-22 11:19:00 2015-08-26 12:58:07 2015-08-26 12:58:43 2015-08-26 12:59:26 2015-08-26	\$100.00 \$10.00 \$100.00 \$250.00	138 138 138 138	Lenny Falcon John Monroe Peggy Claywell Jason Johnson Petra	DEMO-70709 DEMO-70709 DEMO-70709 DEMO-70709	Lenny.Falcon@text2fund.net John.Monroe@text2fund.net Peggy.Clayweli@text2fund.net Jason.Johnson@text2fund.net	1D 2-DEMO- 1440267540 2-DEMO- 1440619087 2-DEMO- 1440619123 2-DEMO- 1440619166

Next Steps

# After Campaign > Reports > Donor Demographic Data Donor Demographics

Transfer this report into your donor relationship management database. This allows you to utilize all the donor demographic data, such as name, email, address, donation amount and timestamp. You may export this report to Excel.

# After Campaign > Reports > View/Print Invoices

# Donor Invoices

Email donors their payment/donation confirmation receipt the moment they make a donation. In addition, this report captures all invoices in case you need to re-send an individual payment receipt to a donor.

text2	2fun		Car	nnaigr	Can	tal Raised npaign Closes 6 8:00 PM PST welcome dfisko	00: @maestros	793.0	0 . og (
	efore Camp		During Campaig				e Center	Reports	De
Donor	Demo	oran	hic Dat	a					
		-			t_notices-20201012-153910.xls				
Show 50 -	entries						Search:		
Date 🔺	Amount	Donor ID	Mobile	Name	Email	Address	City	State	Zip
2015-08-22 11:19:00	100.00	138	DEMO-70709	Lenny Falcon	Lenny.Falcon@text2fund.net	1083 Apple Way	Yakima	WA	98
2015-08-26	10.00	138	DEMO-70709	John Monroe	John.Monroe@text2fund.net	1098 Fruit Lane	Woodinville	WA	98
2015-08-26	100.00	138	DEMO-70709	Peggy Claywell	Peggy.Claywell@text2fund.net	12519 NE 180th Street	Chelan	WA	98
2015-08-26	250.00	138	DEMO-70709	Jason Johnson	Jason.Johnson@text2fund.net	133 Broadway E #305	Seattle	WA	98
2015-08-26 13:00:12	15.00	138	DEMO-70709	Petra Eckles	Petra.Eckles@text2fund.net	13921 53rd Ave NW	Gig Harbor	WA	98
2015-08-26 13:00:57	10.00	138	DEMO-70709	Tom Roberts	Tom.Roberts@text2fund.net	1684 Bellevue Street	Bellevue	WA	98
	ľ								

# Next Steps

Throughout your campaign, please reference our Steps to Campaign Success Guide for everything you can do outside the software to make your Text2Fund campaign a success.

If you have not already, begin with the Text2Fund Getting Started Guide to setup your campaign using the Text2Fund Campaign Manager.



# text2fund

### Contact Us with Questions

The Text2Fund Team will provide help if you have any questions. Email questions to: info@text2fund.com www.text2fund.net



Arreva® is a trusted advisor and market leader of fundraising, donor relationship management, and virtual auction software serving the nonprofit industry for more than three decades. Arreva's, ExceedFurther® All-in-One virtual fundraising and donor relationship management solution along with MaestroAuction™ virtual, live, and silent auction software and services are helping nonprofits further their mission, cultivate donors, and raise billions of dollars.