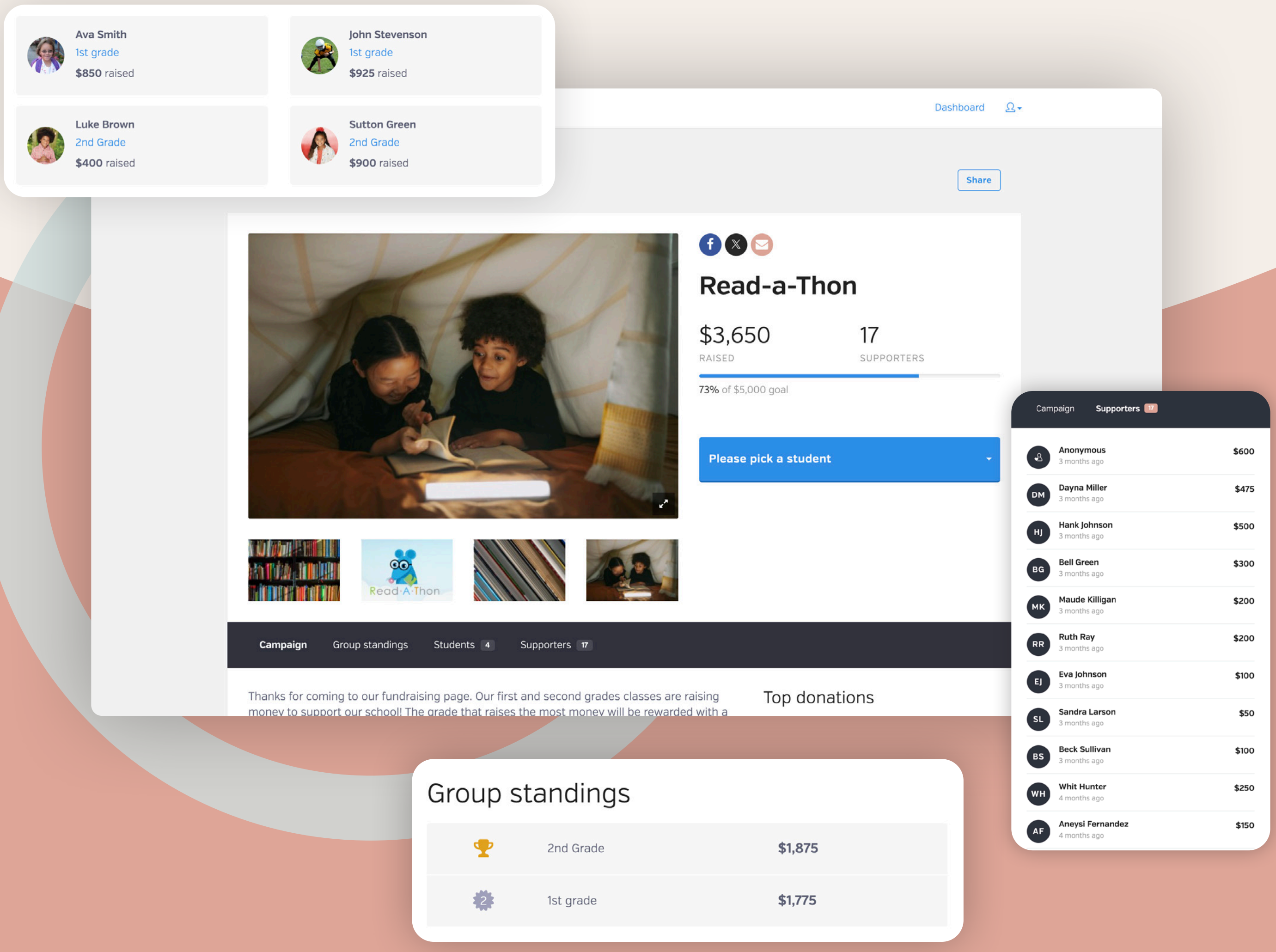
betterworld

Your Complete Guide to BetterWorld's Peer-to-Peer Campaign

This guide offers step-by-step instructions to set up and run a successful Peer-to-Peer campaign, empowering participants to fundraise through their personal pages and networks.



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Introduction

Peer-to-Peer campaigns are a powerful way to engage supporters and amplify your fundraising efforts. This guide is designed to help you set up and run a successful Peer-to-Peer campaign, where participants raise funds through their personal pages and networks. Whether you're organizing a school fundraiser, community initiative, or nonprofit event, this guide provides step-by-step instructions to make your campaign seamless and impactful.

Let's get started!

Traditional Peer-to-Peer vs. A-thon Style

First, it's important to note that BetterWorld offers two types of Peer-to-Peer campaigns: the traditional Peer-to-Peer campaign and the A-thon style. This guide will walk you through setting up and running a traditional Peer-to-Peer campaign, and we have a separate guide for the A-thon format. The key difference between the two is that in a traditional Peer-to-Peer campaign, participants raise funds through flat donations, whereas in an A-thon campaign, participants collect donations based on the completion of activities, such as laps in a walkathon or pages read in a read-a-thon.

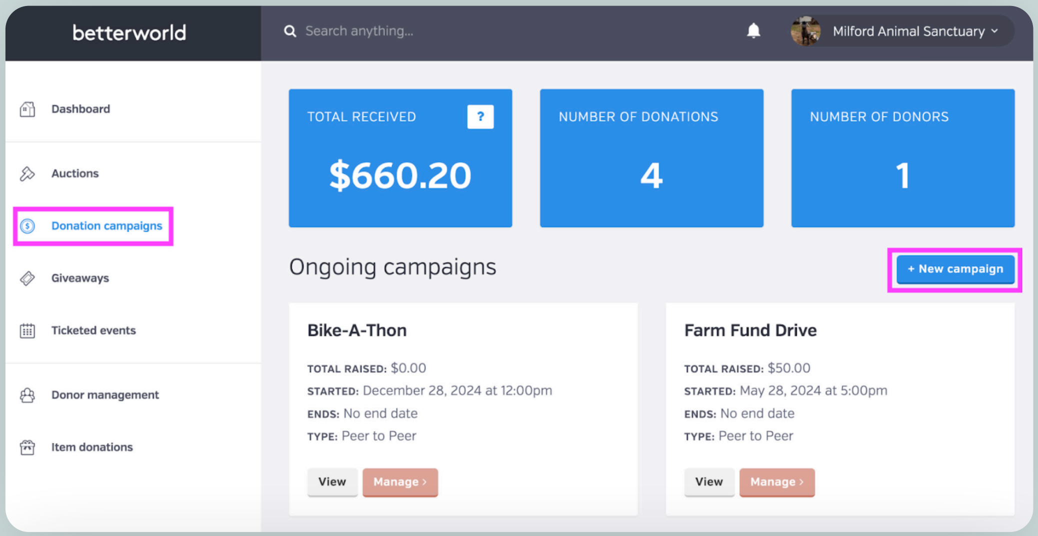
Looking to set up an A-thon style campaign?

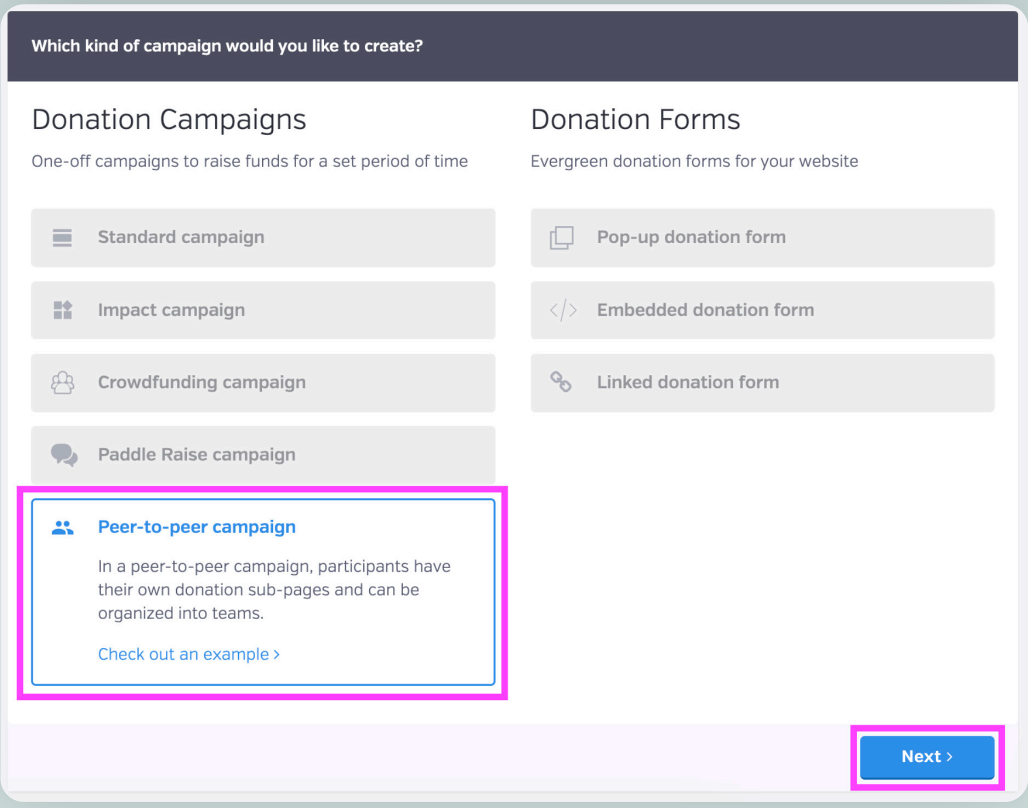
Check out Your Complete Guide to BetterWorld's A-thon Campaign

Step 1: Peer-to-Peer Creation

Creating your campaign is simple and intuitive—just follow these steps to set up a compelling fundraising page that engages donors and drives contributions.

1. **Create Your Campaign.** Go to the Dashboard, click **Donation Campaigns**, and click the **+ New Campaign** button. Select **Peer-to-Peer** campaign and then click **Next**. The system will guide you through the setup process.

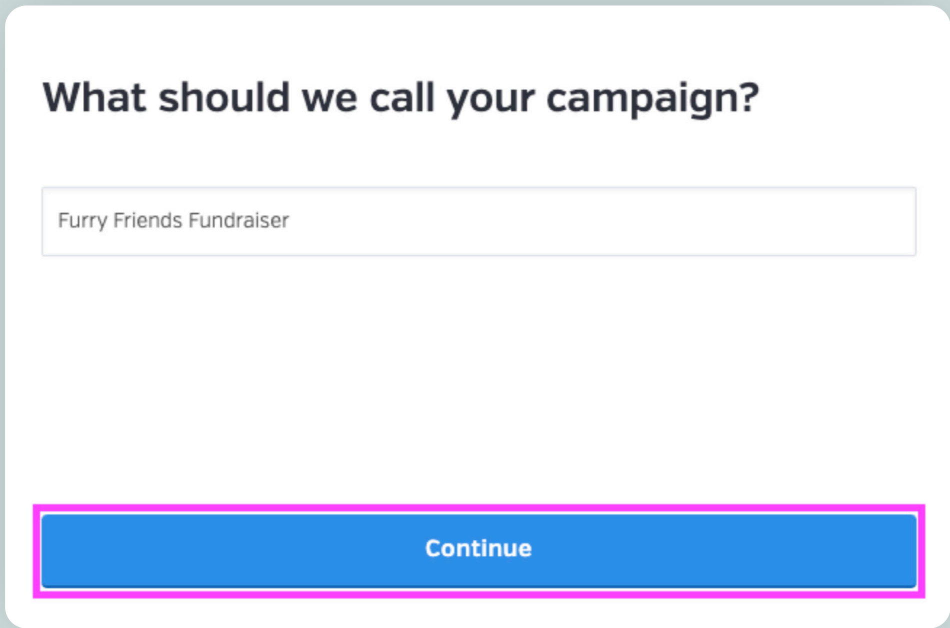




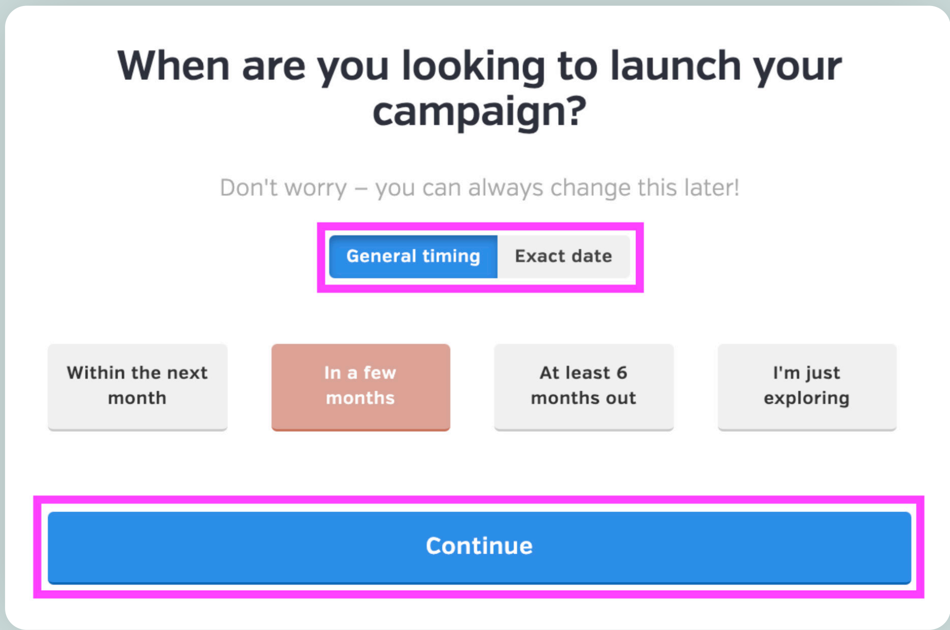
NOTE:

Any details you enter during campaign creation can be updated later in your dashboard. If you'd prefer, you can leave the optional sections blank and make changes later. Just head to your dashboard, click **Donation Campaign**, click **Manage** on your Peer-to-Peer campaign, and click **Settings** to update your information.

2. **Pick a Name.** Choose something compelling that conveys your campaign's purpose, like "Support Our Varsity Basketball Team" or "Help Us Build a School."



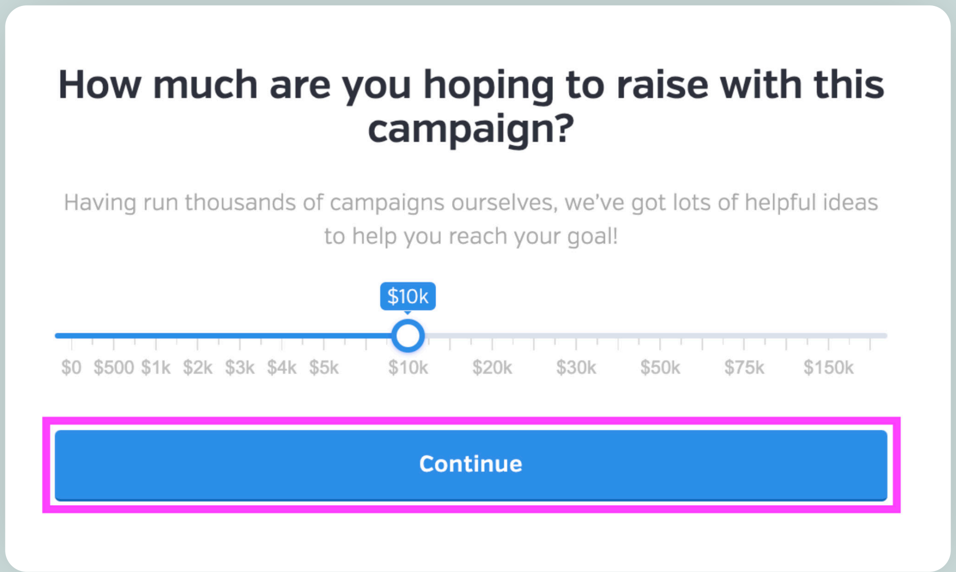
3. **Set a Start Date.** Choose a start date and time for accepting donations. Not sure when to begin? Set an estimate now, and you can adjust it later in the dashboard.



TIP:

We recommend a duration of 1-3 months for a peer-to-peer campaign. This timeframe is ideal as it gives people ample time to share and help spread the word! Feel free to make it longer or shorter based on your needs.

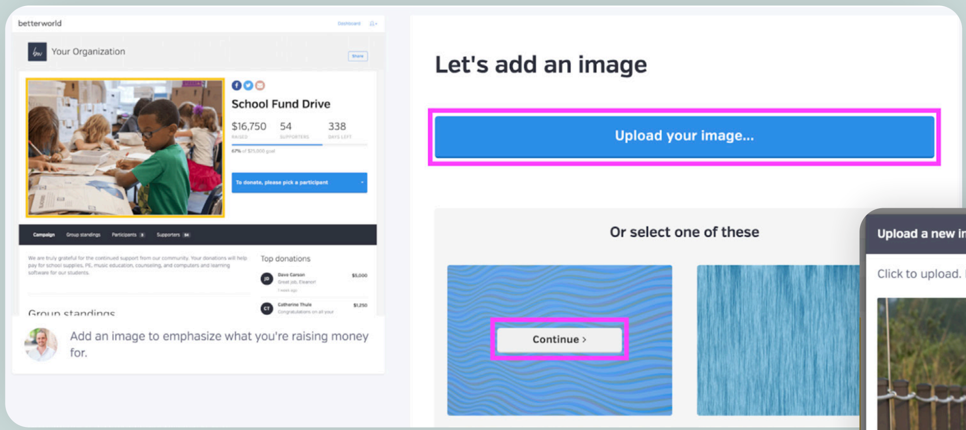
4. **Set a Fundraising Goal.** Set your campaign goal by dragging the circle. This goal will be shown on the Peer-to-Peer main page, and every dollar raised by participants will contribute to reaching it. It's an excellent way to engage your donors and keep them updated.

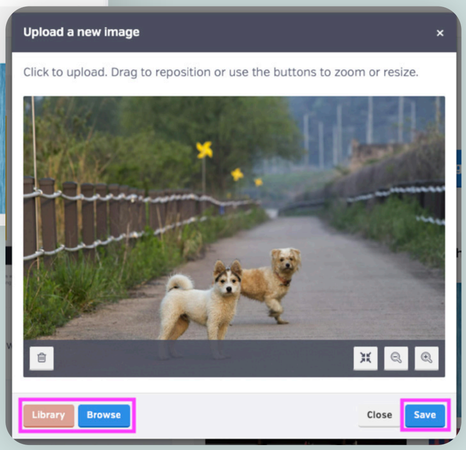


NOTE:

Fundraising won't be capped at this goal, and there's no penalty for not reaching it. All the funds raised are yours to keep, no matter how close you get to the goal.

5. **Add An Image.** Let's add an image to make your Peer-to-Peer campaign stand out! You can choose an image from your desktop or use BetterWorld's built-in image library to search for one that best suits your campaign. You can add one photo during the setup and then up to four photos later.

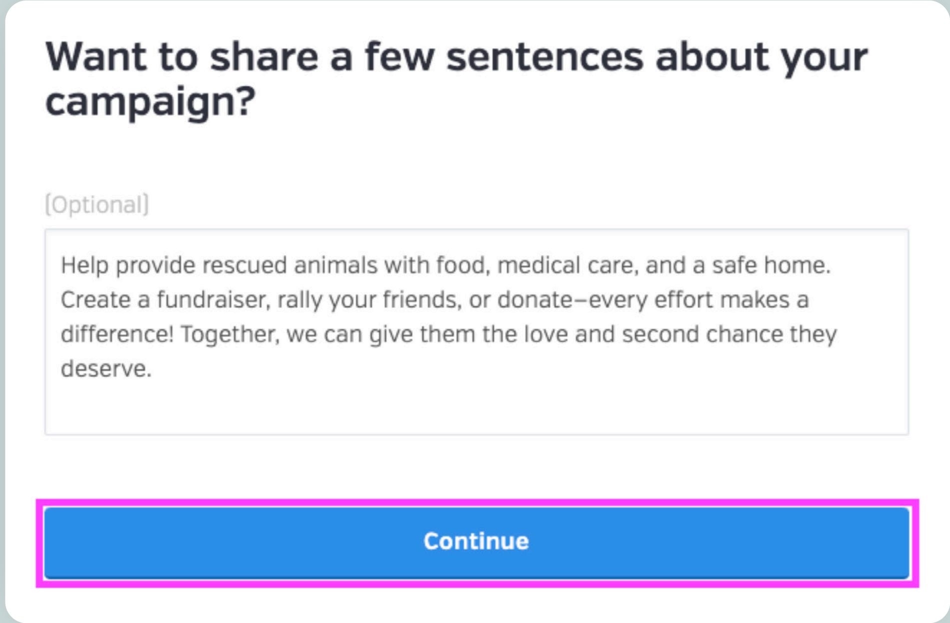




TIP:

An image representing your end goal will help donors visualize what they are donating towards. For example, if your Peer-to-Peer campaign is to help you build a new playground, a clear image of a beautiful playground will allow donors to see what their money is going towards.

6. **Write a Message to your Donors.** This is the perfect place to share your story and explain why their participation matters. Whether it's a few sentences or a few paragraphs, make it personal.



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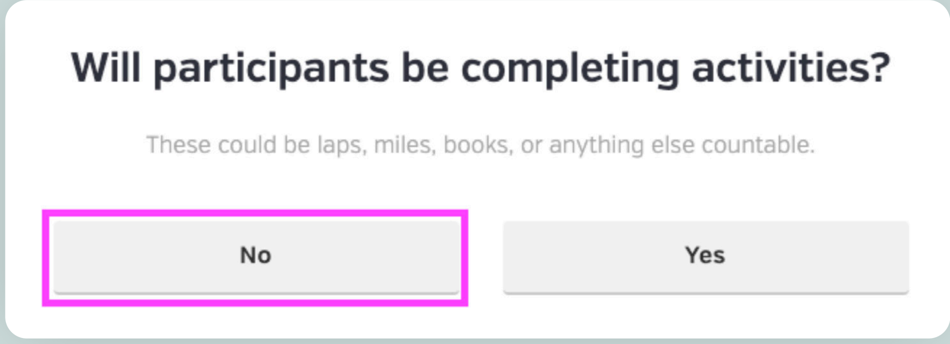
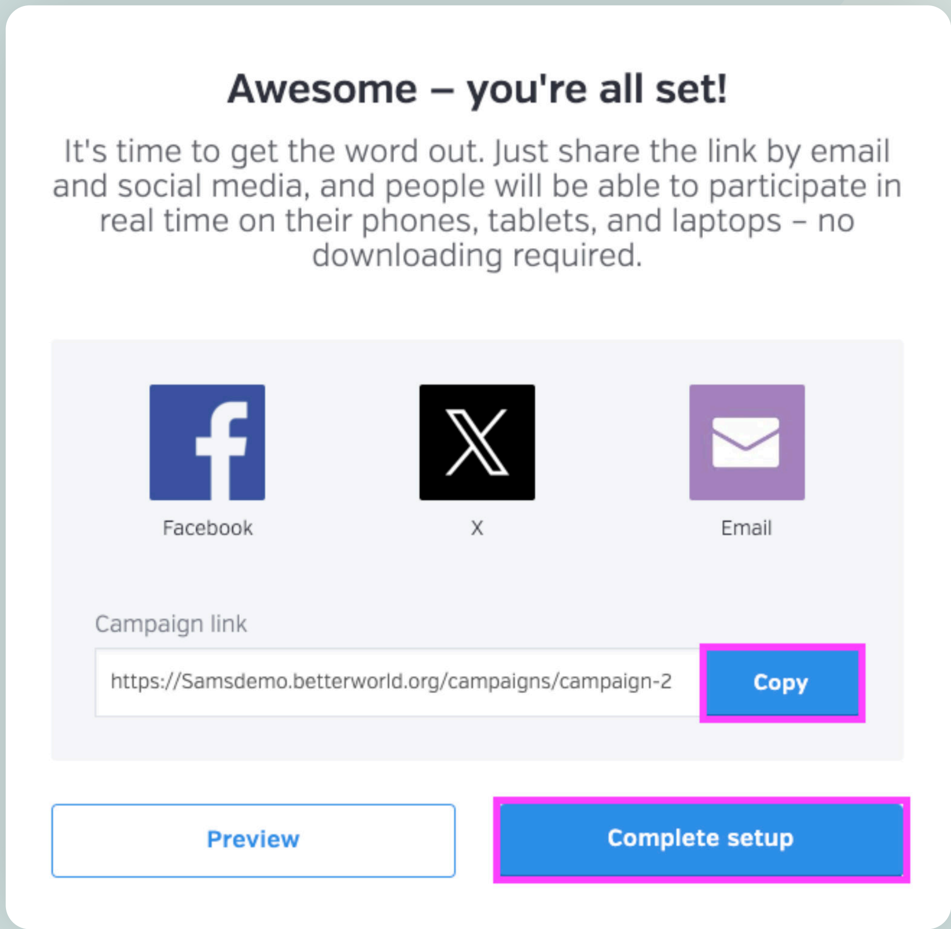
7. **Pick Your Style.** Next, you'll be asked whether your participants will be completing activities. This question helps determine if you're setting up a traditional Peer-to-Peer campaign or an A-thon-style campaign. Since we're creating a traditional Peer-to-Peer campaign, select **No**.



The basics are done! Finish up by clicking the **Complete Setup** button. Now that your campaign is created let's dive into a few more options on the dashboard to get everything fine-tuned.



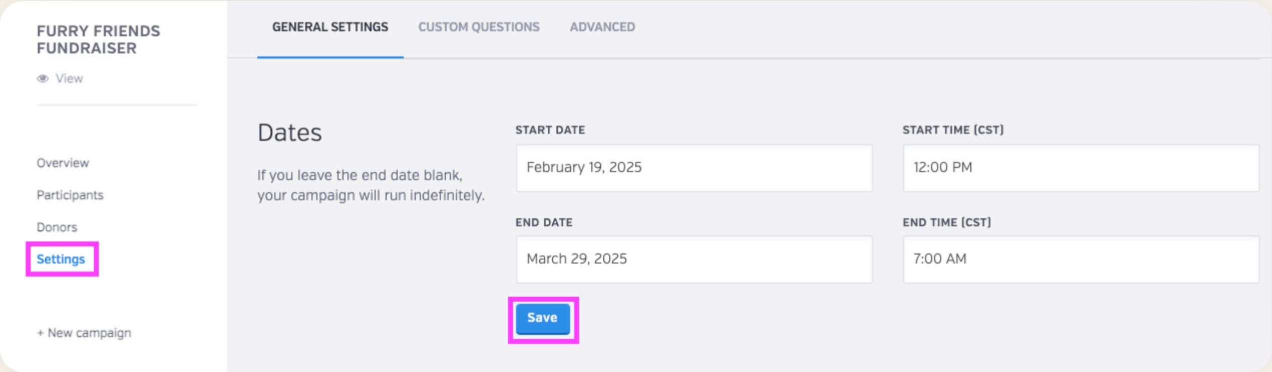
TIP:

Use the copy link button to grab the link to your campaign. You can always copy this link again by viewing your Peer-to-Peer campaign or visiting the **Settings** page in the dashboard.

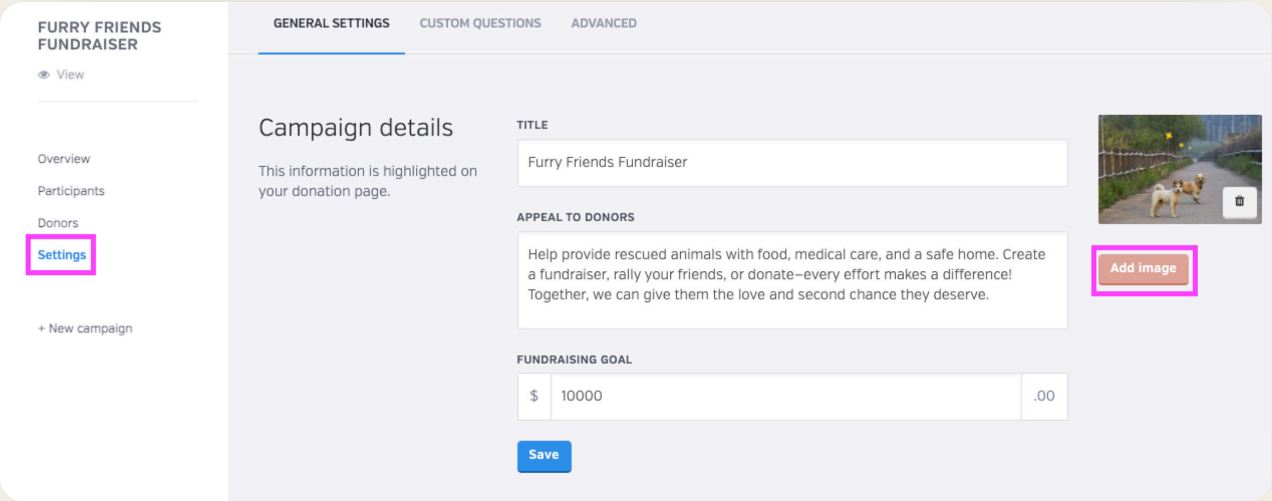
Step 2: Fine-Tune Your Campaign Settings

This section covers both required and optional steps. It's recommended to complete these steps before sharing your campaign with donors to ensure a smooth and engaging launch

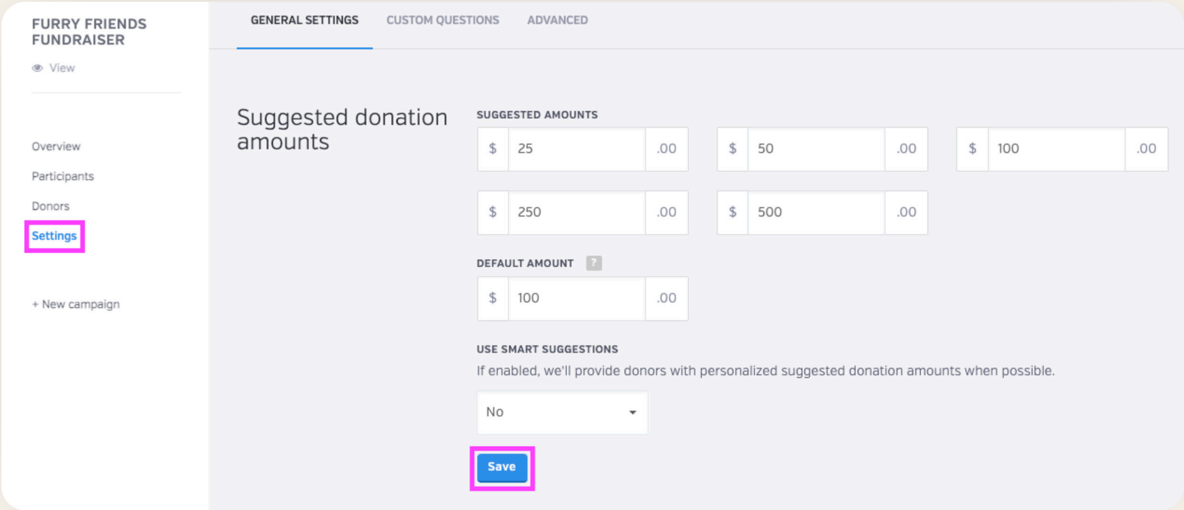
1. **Optional: Set an End Date.** Head to **Settings** and scroll to the **Dates** section. While an end date is optional, it helps drive urgency and excitement. We highly recommend setting one for your Peer-to-Peer campaign.



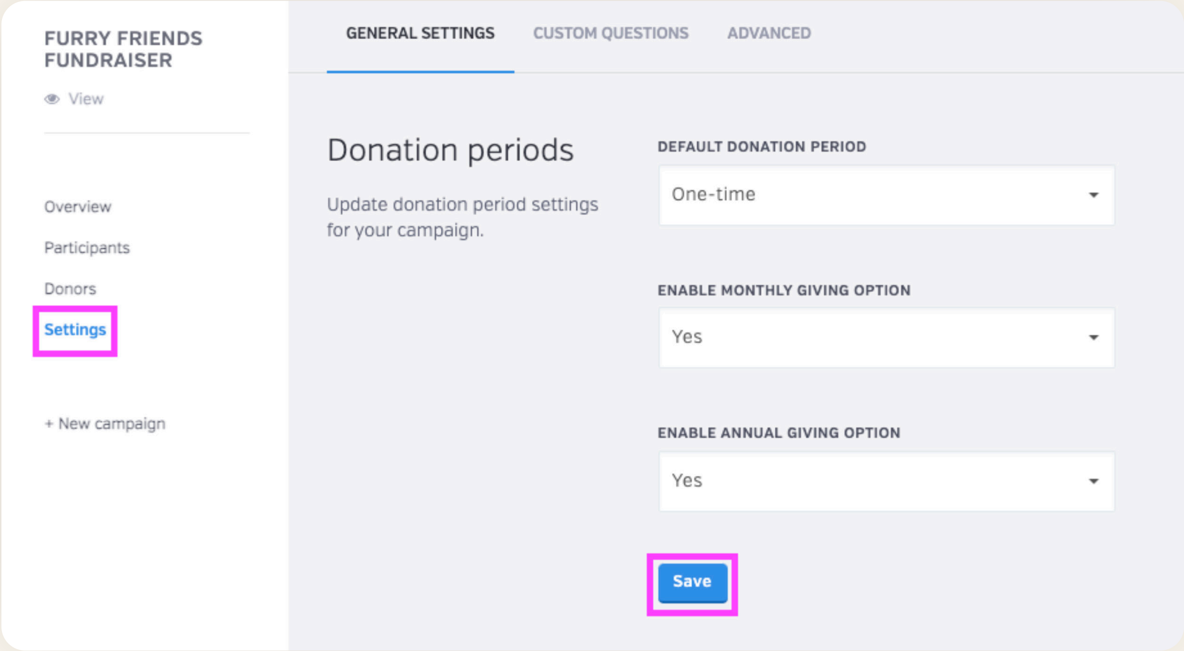
2. **Optional: Add Photos.** Head to **Settings** and scroll to **Campaign Details**. Click the **Add Image** button on the right. The more photos you add, the more your donors can visualize the impact of their donation!



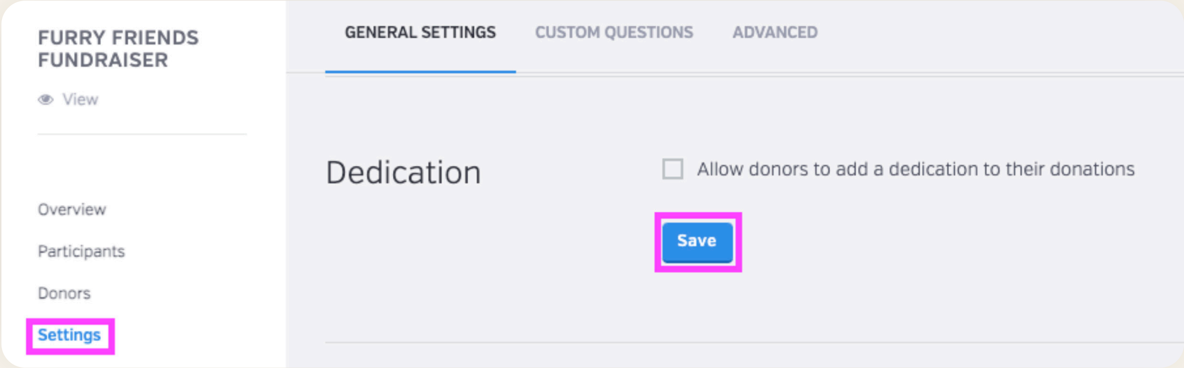
3. **Optional: Set Suggested Donation Amounts.** Go to **Settings** and scroll to the **Suggested Donation Amounts** section. Adjust the default amounts or use the preset amounts. Enable **Smart Suggestions**, which offer personalized donation amounts based on the donor's location, making the giving experience more tailored and engaging.



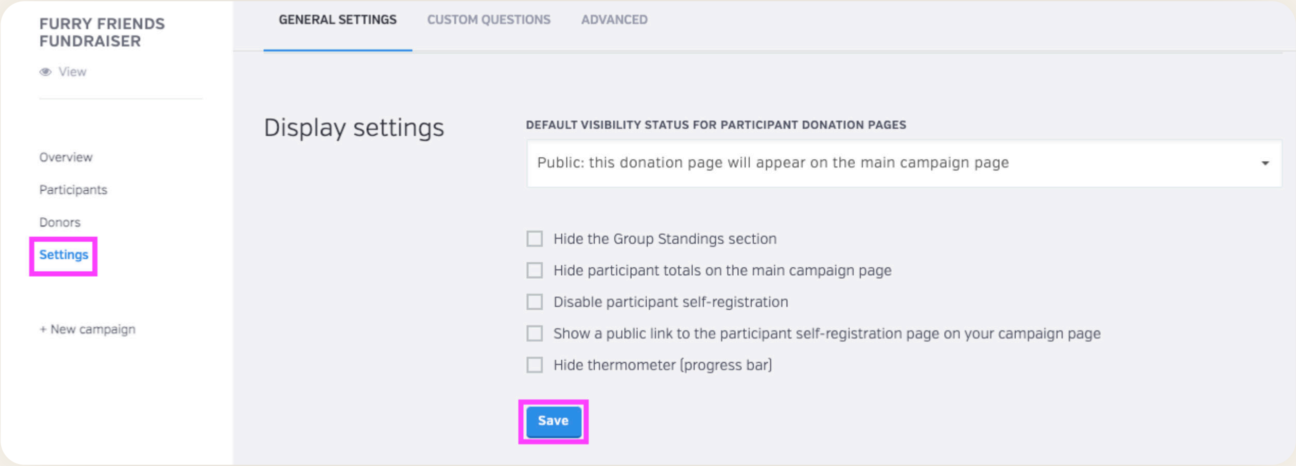
4. **Optional: Edit the Default Donation Period.** Go to **Settings** and scroll to **Donation Periods**. Choose a default donation period—one-time, monthly, or annual—or disable recurring options to align with your donors' preferences and fundraising goals.



5. **Optional: Enable Dedications.** Go to **Settings** and scroll to **Dedication**. Enable donors to add personal messages, like "In memory of..." or "In honor of...". Enabling dedication adds a personal and emotional touch that can encourage more meaningful contributions.



6. **Optional: Edit Display Settings.** Go to **Settings** and scroll to **Display Settings**. Customize the information that is visible to donors and participants.



Participant Page Visibility: In the drop-down menu, you can adjust the visibility of participant pages to:

- **Private:** Only the participant and your team can view the page.
- **Restricted:** Accessible only via the direct link.
- **Public:** Visible on the campaign's main page (recommended for maximum impact).
- **Unapproved:** Prevents participants from raising funds until you approve their page.

To approve a page, go to **Participants**, select the participant's name, and adjust visibility in **Privacy Settings**.

Customizing the information displayed: Use the checkboxes to customize the information you want to hide or display on the Peer-to-Peer main page:

- **Hide Group Standings**: Remove team rankings from the main page.

TIP: Displaying group standings encourages friendly competition and active participation.

- **Hide Participant Totals**: Donors won't see individual participant totals on the main page.
- **Disable Participant Self-Registration**: Only your team can add participants.

TIP: Allowing self-registration saves time and streamlines setup!

- **Show Self-Registration Link**: Adds a button under the **Donate** button on the main page for participants to self-register and create their page.
- **Hide Thermometer**: Removes the progress bar showing how close you are to your fundraising goal.

TIP: Keep the thermometer—it's a great motivator for donors!

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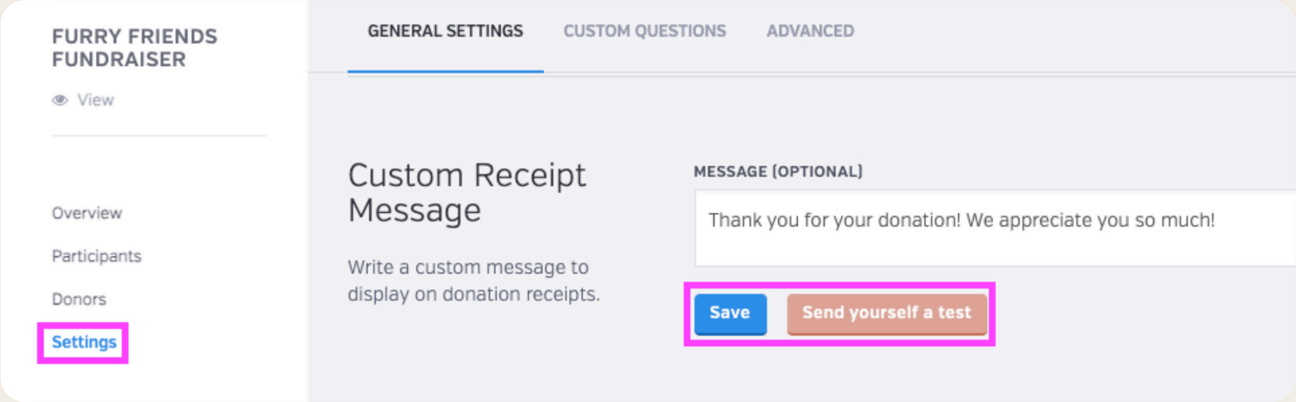
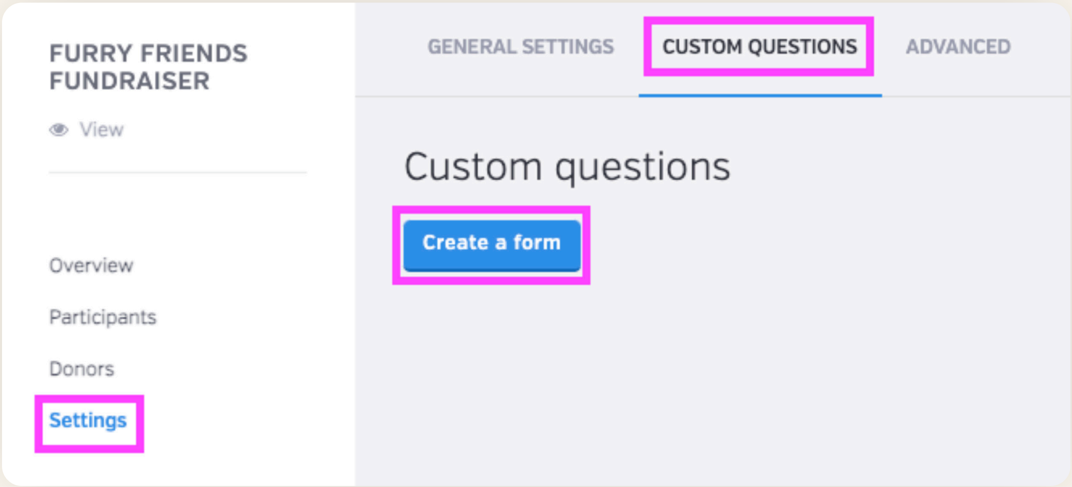
7. **Optional: Custom Receipt Messages.** Go to **Settings** and scroll to **Custom Receipt Message** to add a thank-you note. A custom message shows appreciation, enhances the donor experience, and encourages future contributions.

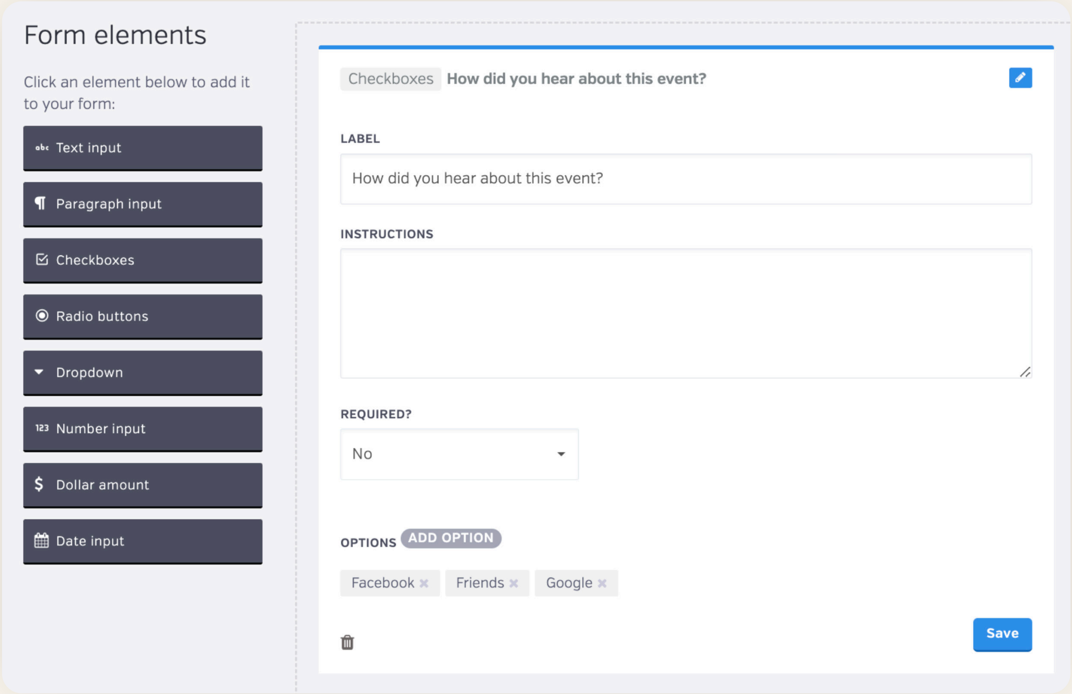


TIP: You can send yourself a test to see how the message will appear on the receipt.

8. **Optional: Add Custom Questions.** Go to **Settings**, click **Custom Questions** at the top of the page, and select **Create a Form** to gather additional donor information.

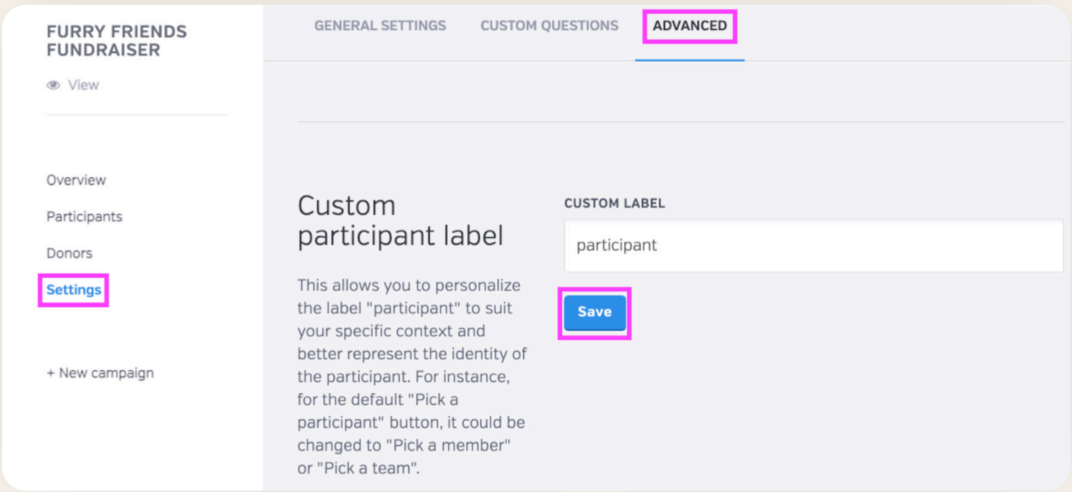


Custom questions allow you to ask for more information from donors outside of the standard information we collect for you (name, email, address, and phone). For example, "Would you like to join our newsletter?" You can make these questions required before they place their donation or leave them as optional. Choose the type of answer format you'd like to use, and the system will guide you from here.

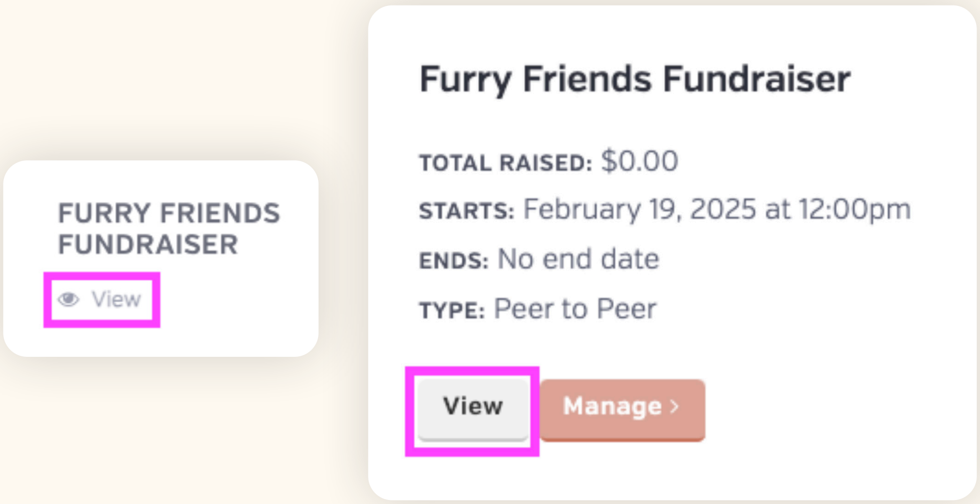


You can view your custom question responses by heading to the **Campaigns Overview** page. In the **All Donations** table, click the column icon in the upper right corner and select your custom questions to view the responses from your donors.

9. **Optional: Edit the "Please pick a participant" button.** Head to **Settings**, click **Advanced** at the top of the page and scroll to the **Custom Participant** label. The button appears on your campaign's main page to be clicked for donors to choose which participant to support. You can, for example, change the word "participant" to "student" or "volunteer" – whichever best suits your campaign.

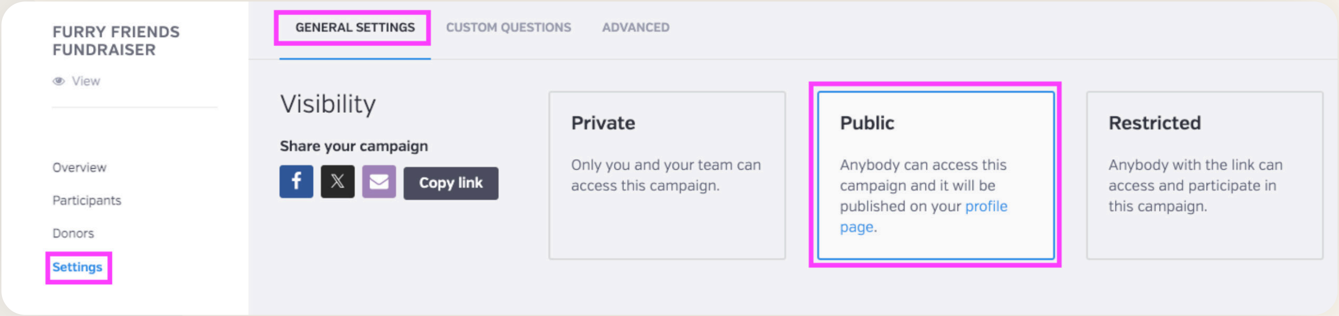


Now that everything is set up let's check out your completed Peer-to-Peer Campaign! Click the **View** button to see what your donors will experience when they click the link you share with them. You'll find this button in your dashboard under your campaign name or by going to **Donation Campaigns** and selecting the **View** button instead of the **Manage** button.



▶ **There is just one final step that is required before you can start sharing your campaign.**

10. **Required: Set visibility.** Go to the **Settings** page; the first section is **Visibility**. Let's make sure your donors can see all your hard work. By default, your campaign is set to **Private**. To start spreading the word, change the visibility from **Private** to **Public**. This will allow donors to view the amazing page you've created! You will also see the option to set your campaign to restricted. When set to restricted, anybody with the link can access and participate in the campaign, but it will not appear on your organization's profile page.



TIP:

In the Visibility section, you can also copy your campaign link or use the share buttons for Facebook, X, or email to easily promote your campaign.

Well done! Your setup is complete. Next, we'll walk through how to set up teams and participants.

Step 3: Managing Participants and Teams

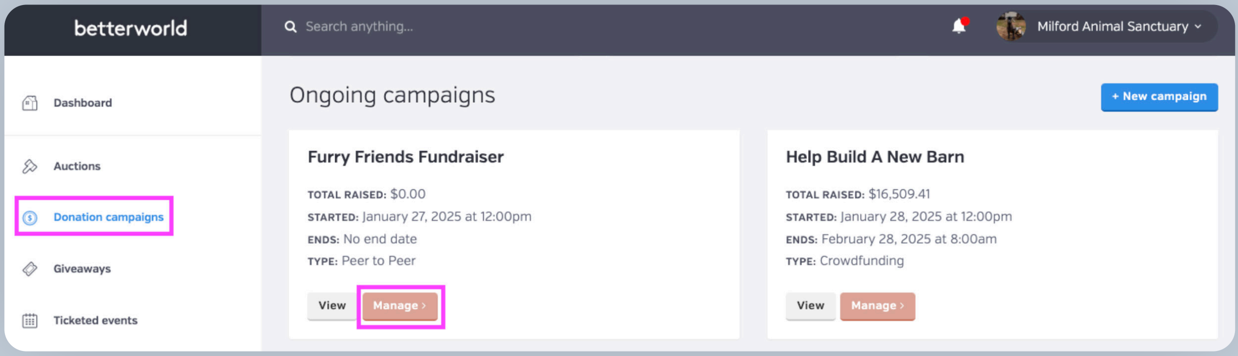
An essential part of a Peer-to-Peer campaign involves participants who raise funds on your behalf. Participants can be anyone who wants to help, such as students from a school or volunteers from an animal shelter. You can either manually add participants or allow them to register themselves. Plus, you can organize teams for some friendly competition, where participants can vie for prizes or simply enjoy the fun of competing!

Teams

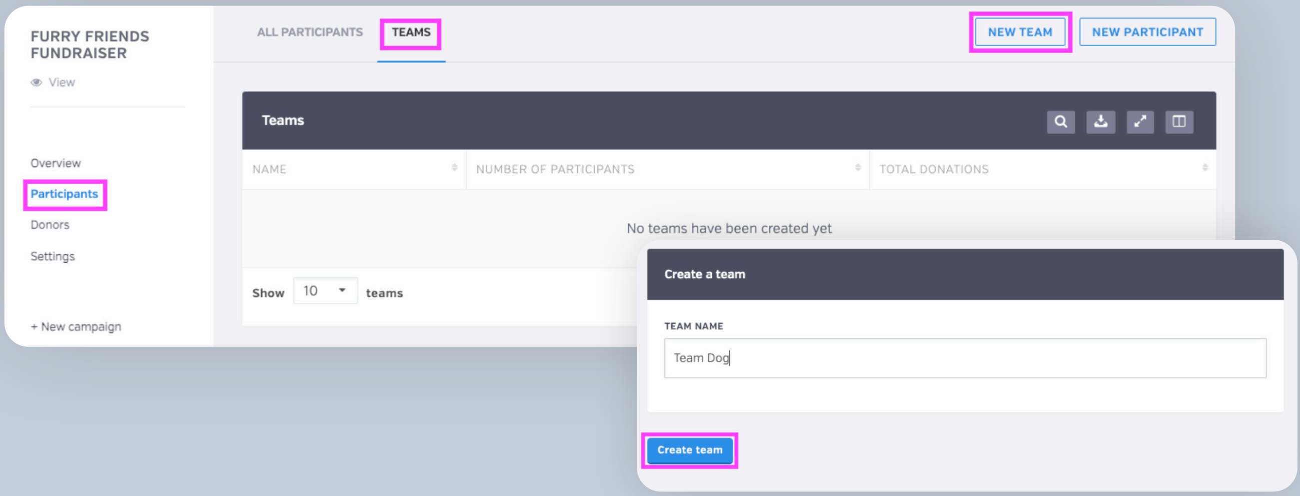
Setting up teams is optional but adds an exciting element of competition, motivating both participants and donors. Team standings are displayed on your campaign page by default, but you can hide them and track rankings privately in your dashboard. Customization details are explained in the next section, *Display Settings*.

How to Set Up Teams:

1. Click **Manage** on your Peer-to-Peer campaign.



2. Navigate to **Participants** and select **Teams** at the top of the page.
3. Click **New Team** to add your team names.



If participants are self-registering, they can choose their team from a drop-down menu. For participants added manually or registered before teams are created, you can edit their team assignment later by navigating to the **Participants** page, clicking the participant's name, and updating their team selection in the drop-down menu.

TIP:

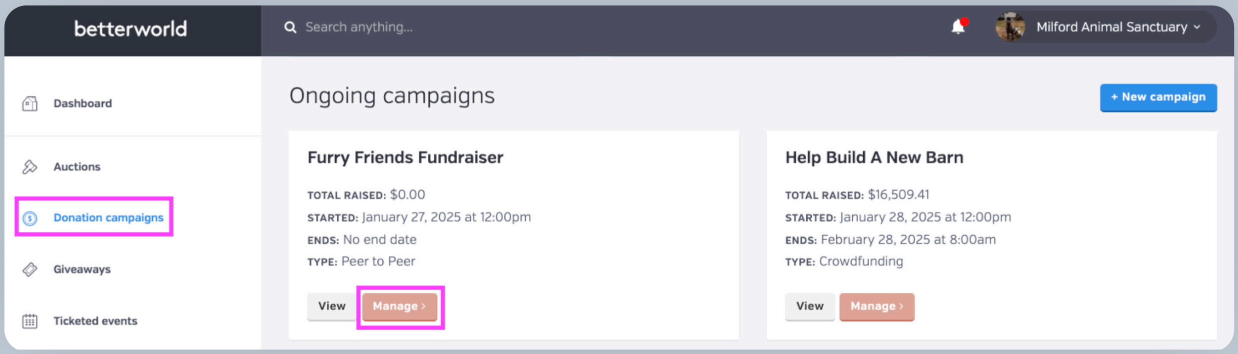
When selecting team names, tie them to your organization for added relevance and fun. A school might use grade levels or teacher names, while an animal shelter could choose "Cats" and "Dogs." Get creative—engaging team names add excitement and help participants connect with your campaign!

Manual Participant Creation

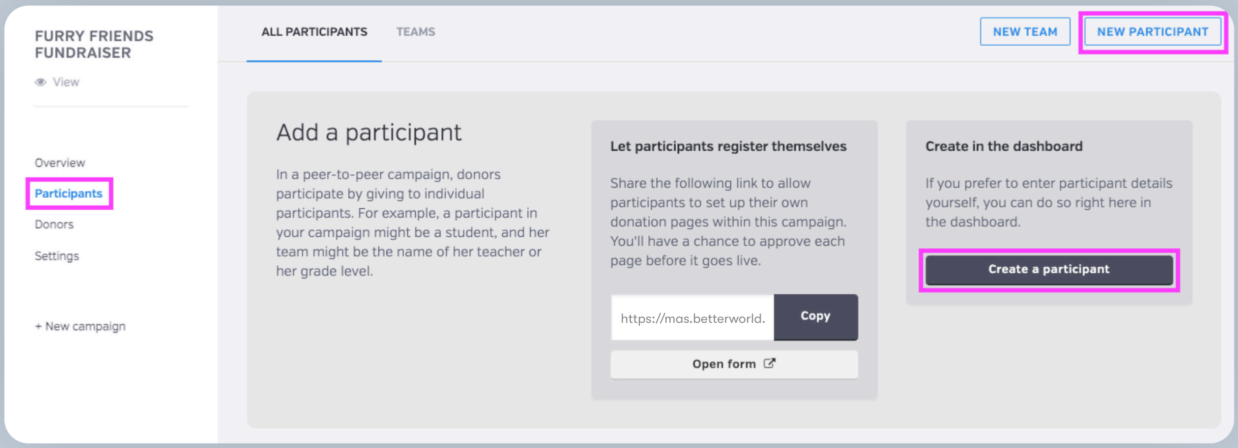
Easily create Peer-to-Peer participants and manage their pages with full control. This is ideal for organizations that prefer to set up participant details or maintain privacy standards.

To manually create a participant:

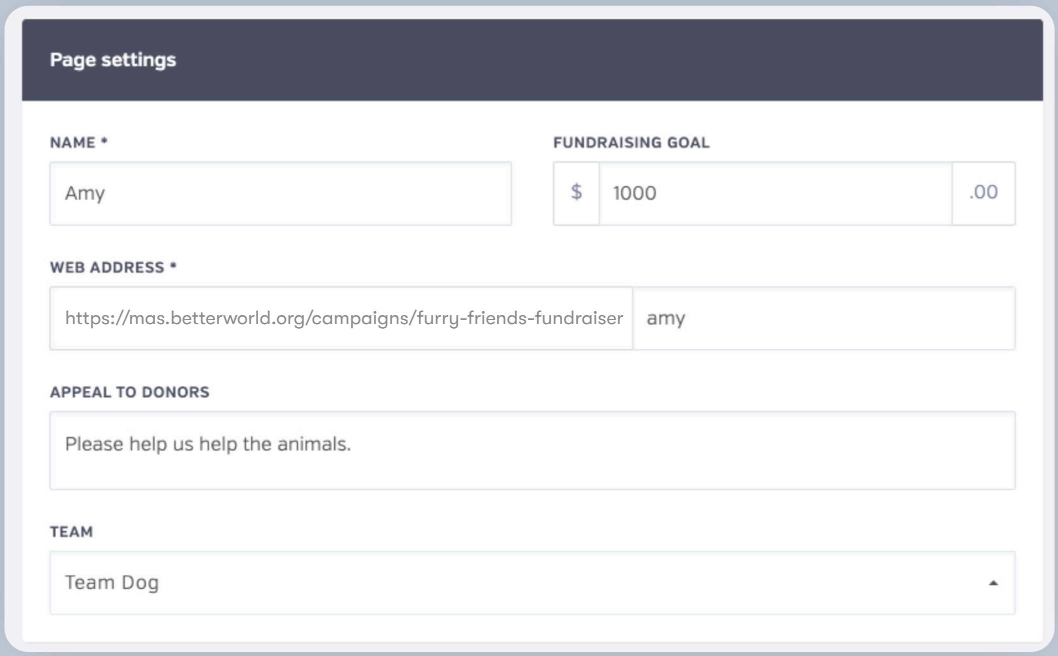
1. Go to **Donation Campaigns** and click **Manage** on your Peer-to-Peer campaign.



2. Click **Participants**, then click **New Participant** in the upper-right corner.

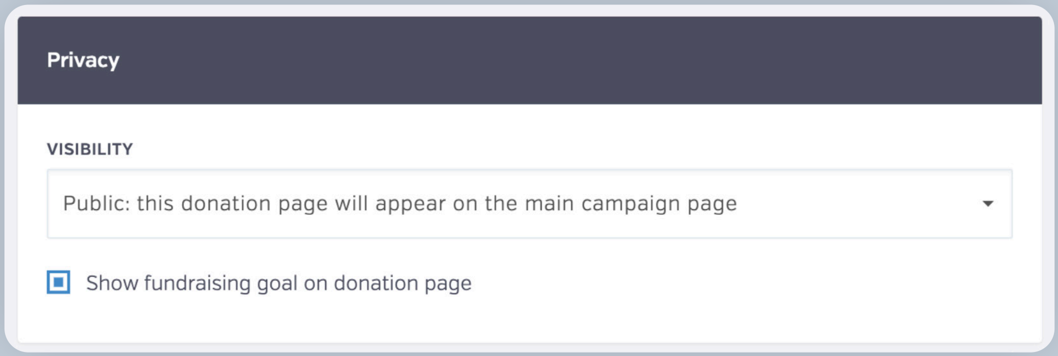


3. Add participant details:
   - **Required**: Name.
   - **Optional**: Fundraising goal, team assignment, and a personalized message in the **Appeal to Donor** section.



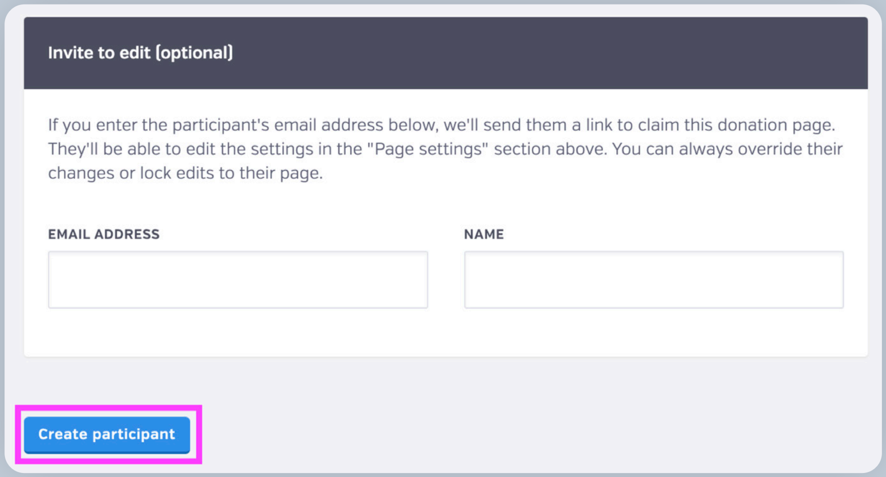
4. Set the participant's page to one of three options:
   - **Public:** Visible to everyone on the main campaign page (default).
   - **Restricted:** Accessible only via the direct link.
   - **Private:** Only visible to your team and the participant through the dashboard.

You can also choose whether to display the participant's fundraising goal by unchecking the appropriate box.

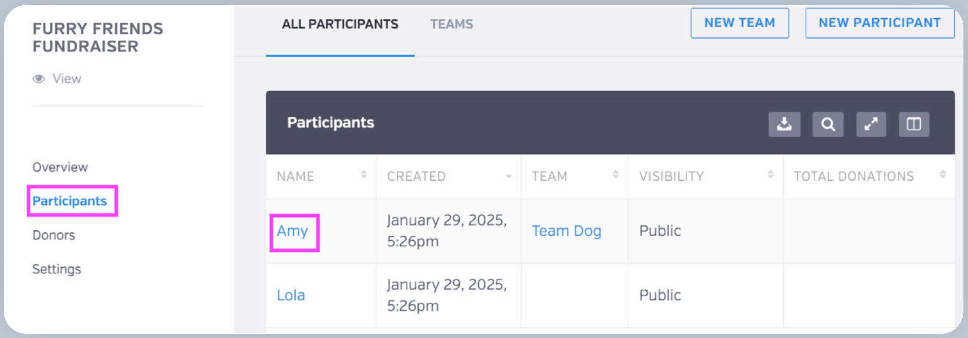


5. Enter the participant's email to send them a link to claim their page. They can update settings in the **Page Settings** section, but you can override or lock changes as needed.

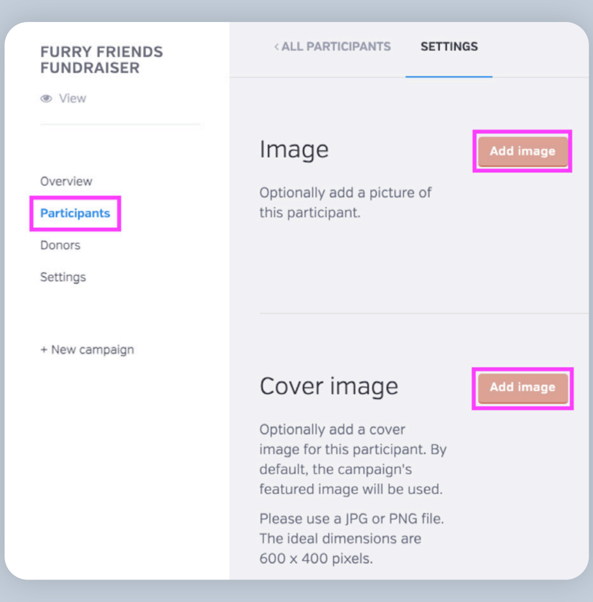
6. Click **Create Participant**.



7. Add a profile image and a cover image to personalize the participant's page.
   a. Go to **Participants** and select the participant's name.



   b. Scroll to the **Image** section:
      » **Image**: Represents the participant.
      » **Cover Image:** Acts as a banner. If no cover image is added, the main campaign image will be used.



TIP:

To check if a participant has claimed their page, go to Participants > Click the book icon in the right-hand column > Select **Claimed**. A **Yes** in this column indicates the page has been claimed.

Allow Participants to Manage Their Page:

Enter the participant's email to send them a link to claim their page. They can update settings in the Page Settings section, but you can override or lock changes as needed.

Adding Images:

Add a profile image and a cover image to personalize the participant's page:

1. Go to **Participants** and select the participant's name.
2. Scroll to the **Image** section:
   - » **Profile Image**: Represents the participant.
   - » **Cover Image**: Acts as a banner. If no cover image is added, the main campaign image will be used.

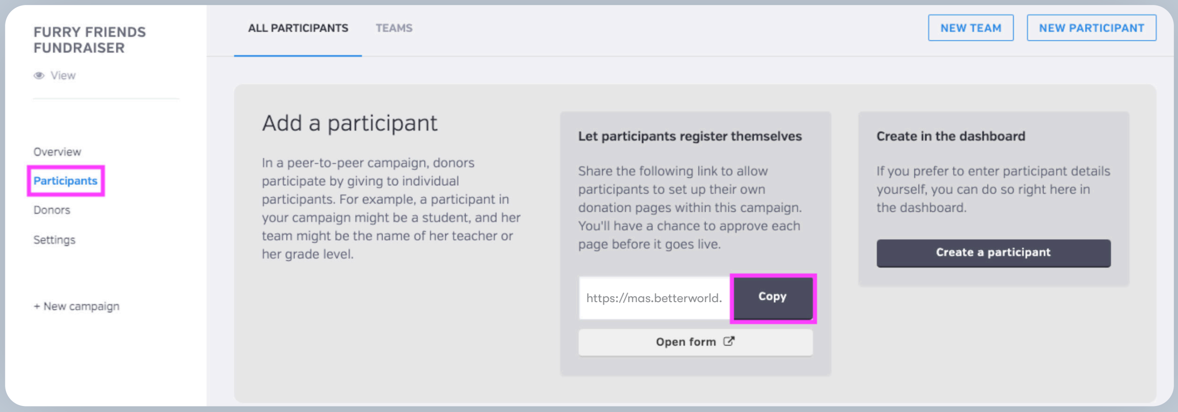
> **TIP:**
>
> To check if a participant has claimed their page, go to Participants > Click the book icon in the right-hand column > Select **Claimed**. A **Yes** in this column indicates the page has been claimed.

3. Click **Create Participant** when finished.

Allow Participants to Register Themselves

Using the Participant Registration Form:

1. Go to **Participants**, and click **Copy** under **Let participants register themselves** to copy the registration form link.

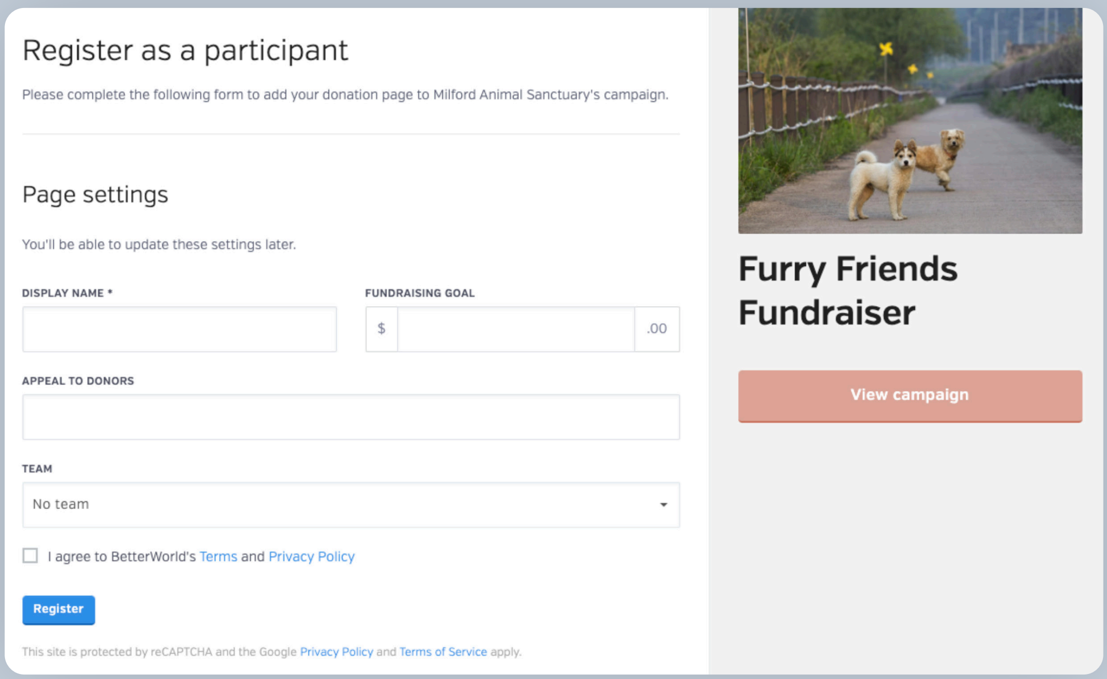


2. Share the link with your participants via email or other communication channels.

> **TIP:** Preview the form by clicking **Open Form** before sharing.

Participants will:

- Click the link and log in or create an account.
- Fill out their details, including name, email, password, and optionally, phone number.
- Add a display name, fundraising goal, appeal to donors, and select a team (if teams are set up).
- Once submitted, participants automatically claim their page and can add images or make changes as needed.



Adding a Registration Button to Your Campaign Page:

1. Go to **Settings**, and scroll to **Display Settings**.
2. Check the box to **Show a public link to the participant self-registration page on your campaign page**. Click **Save**.

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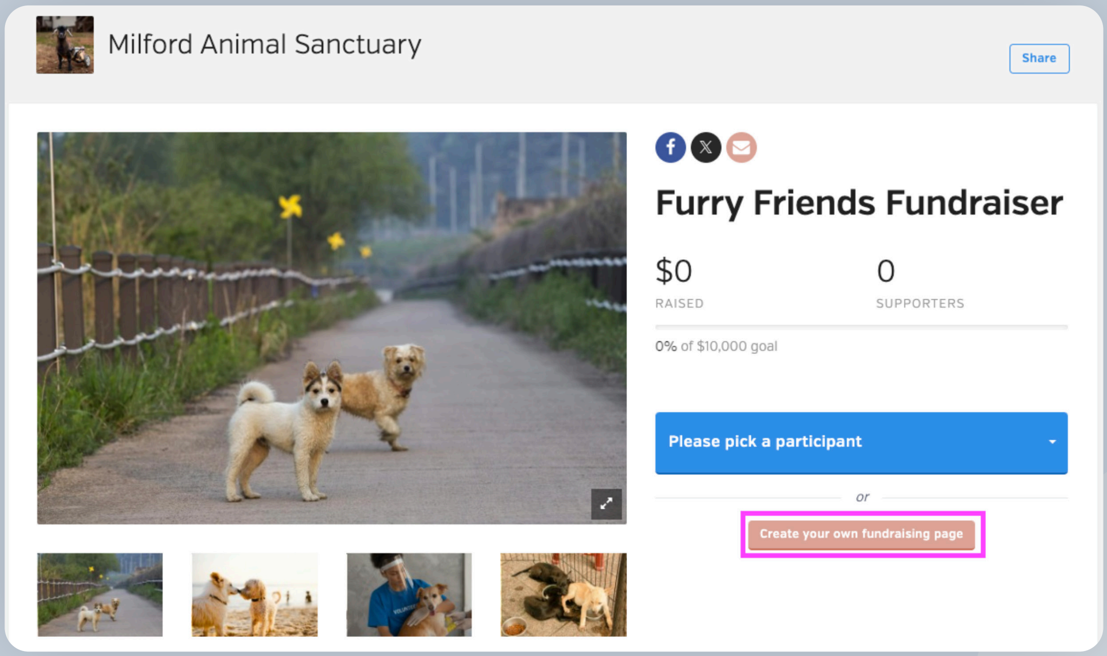
3. Participants can now access the registration form directly from your campaign's main page by clicking the **Create your own fundraising page** button. The process for registration remains the same as outlined above.



Great job! Now let's dive into promoting your campaign and getting those donations rolling in.

Step 4: Getting the Word Out and Maximizing Donations

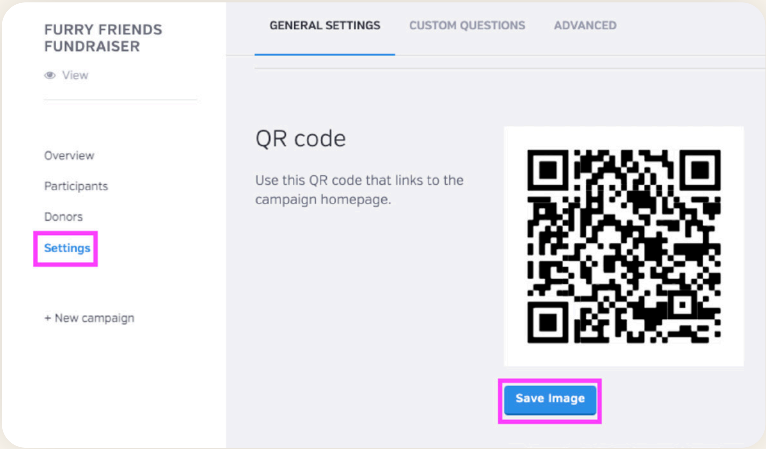
It's time to make your Peer-to-Peer campaign a success by sharing it widely! BetterWorld gives you full control over who can access your campaign link, allowing you to promote it and spread the word strategically.

Use your campaign link to start promoting 1–2 weeks before it begins. This will build anticipation, and sharing updates regularly, as well as increasing reminders as the end date approaches, will maintain momentum. Here are some ways to promote your campaign — the more you do, the more likely you are to receive donations.

1. Email your campaign to supporters! If you have an email list, send out a mass email to share your campaign. Don't worry if you don't have a list yet – you can still use other strategies to gather contacts as your campaign progresses.
2. If you have a website, add a link to your campaign so people can easily learn more and access it.
3. Post a link to the campaign on all your social media channels. You can just copy/paste the link to the campaign, and the image and description will show up automatically.
4. Encourage your board members and volunteers to share the campaign link on their social media. This will help expand your reach to their unique networks.
5. Submit a blurb to local TV and radio channels. These news organizations are always happy to get the word out for nonprofits.
6. If you're a member of any Facebook groups, post a link to your campaign there.
7. Post flyers in community hubs like coffee shops, libraries, churches, and community centers to spread the word. BetterWorld generates a unique QR code for your campaign that you can download and use to guide donors to your auction.

   To find the QR code for your auction, go to the **Settings** page, scroll to the **QR Code** section, and click the **Save Image** button to download it to your computer.

   Your donors will simply open their camera app, point it at the code, and tap the link that appears on their screen.



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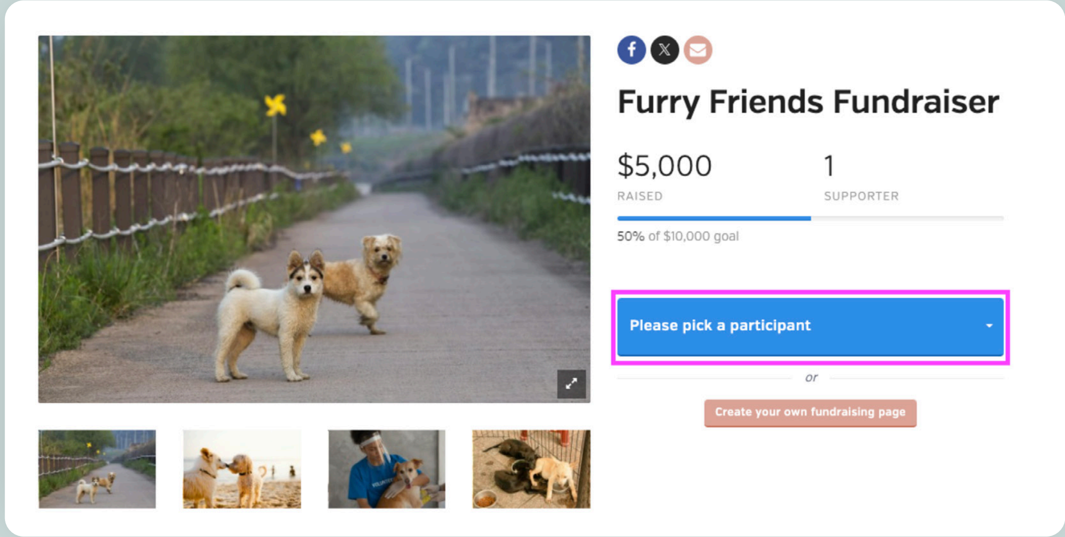
Step 5: Managing Donations: Online, Offline, and Refunds

Learn how donors can contribute to your campaign through online or offline donations and how to efficiently manage and track these contributions, including issuing refunds when needed.

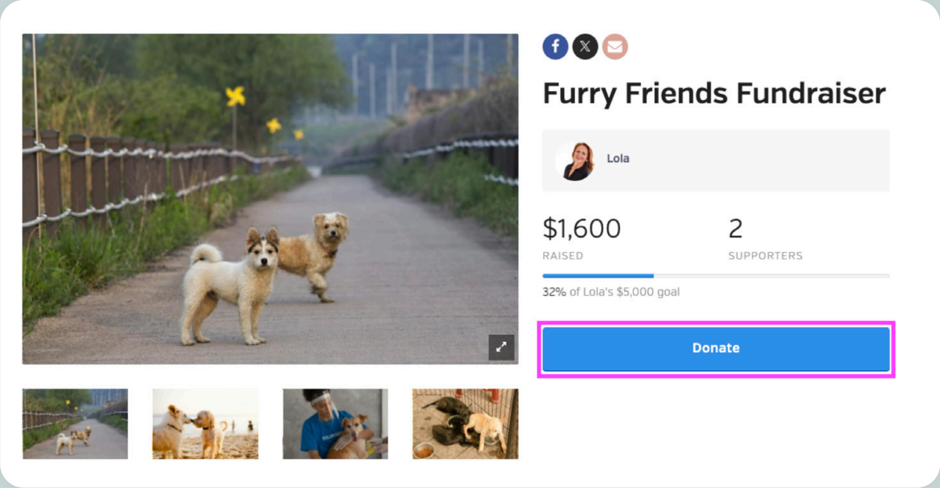
Online Donations

Donors can contribute from your campaign's main page or a participant's page:

- **From the Main Page:** Donors click **Please pick a participant**, select a participant, and are redirected to their page.



- **From a Participant's Page:** Donors click the **Donate** button and proceed to the checkout page. Select a suggested amount or enter a custom value. Donors can add a message, make the donation private, include a dedication (if enabled), and choose a one-time, monthly, or annual frequency.



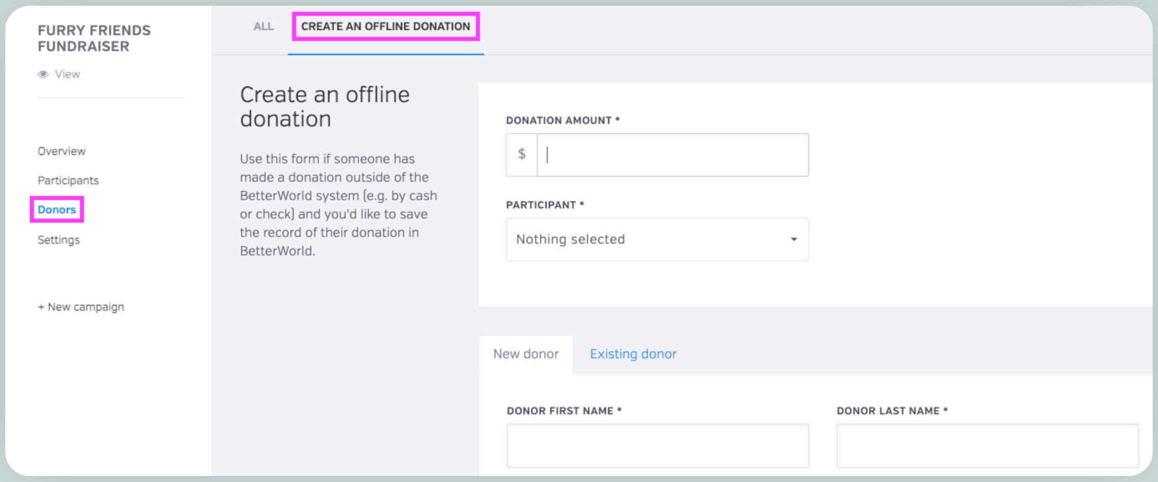
NOTE:

Donors receive an email receipt immediately after donating.

Offline Donations

Track cash or check donations in the platform by adding them manually:

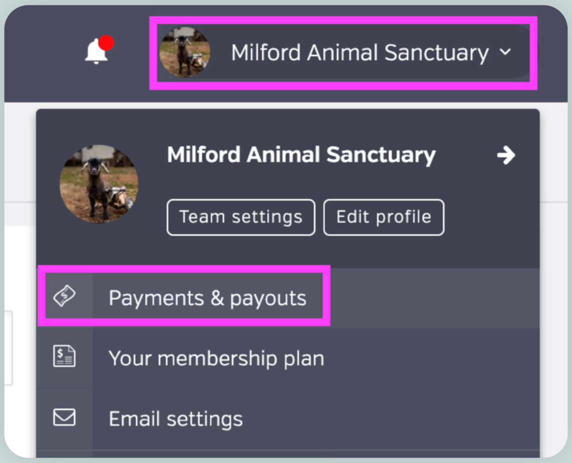
1. Go to **Donors** and click **Create an Offline Donation**.
2. Enter the donation amount and donor details:
   - For new donors, add their name and, optionally, their email for automated receipts.
   - For existing donors, search and select their name from the dropdown menu.



Processing a Refund

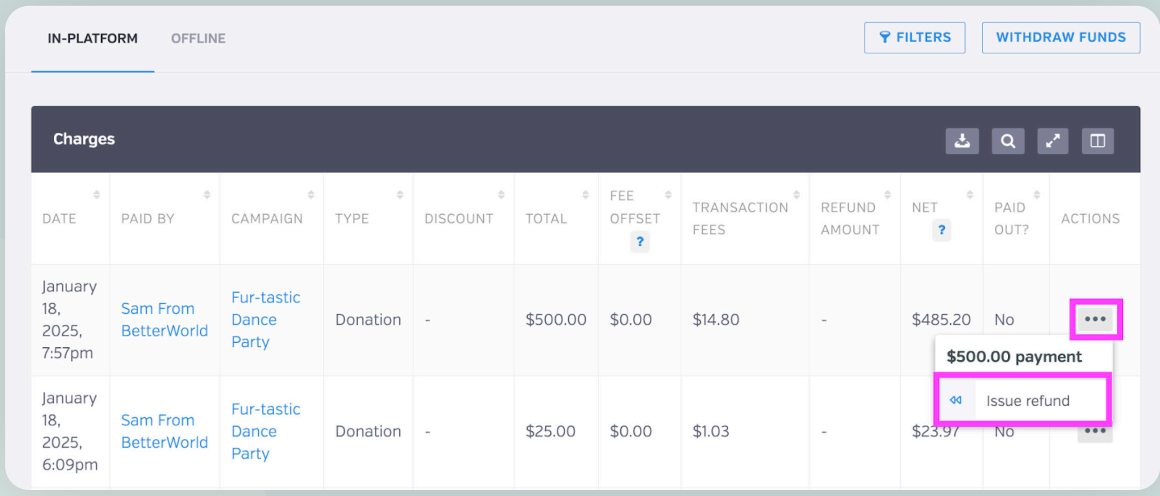
If you've entered an incorrect amount for an offline donation or a donor is requesting a refund, you can handle it quickly:

1. Head to your **dashboard** and click your organization's name in the upper-right corner to open the dropdown menu. Select **Payment & Payouts**.



On this page you'll find a list of all online transactions. For offline transactions, switch to the **Offline** tab at the top of the page.

2. Locate the transaction, click the three dots next to it, and select **Issue Refund.**



NOTE:

Refunds typically take 5-10 business days to reach your donor's bank account.

Step 6: Ending the Campaign and Receiving Your Funds

You've done the work, shared your campaign, and received donations—amazing! Here's how to wrap things up smoothly:

1. Funds are available to be withdrawn six days after being received. This brief holding period is in place to protect against chargebacks, which we also handle for you if it ever comes up.

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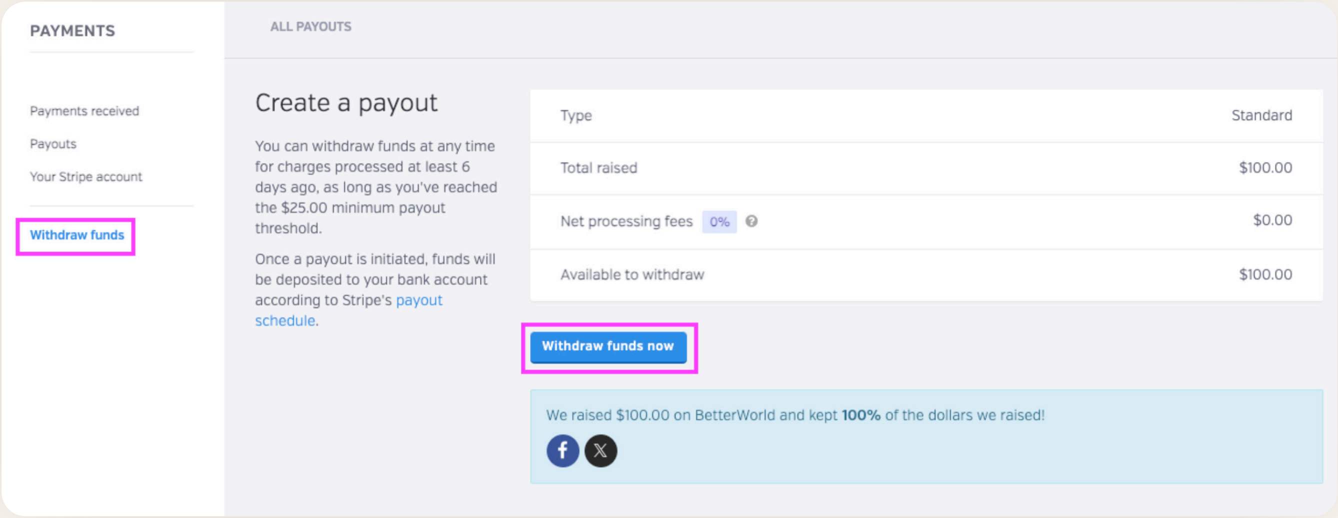
2. Head to Payments and Payouts, and click **Withdraw Funds Now** to send funds to the bank account of your choice.



TIP:

On your **Payments and Payouts** page, you may see a line item titled "Pending." This means those funds have not yet fulfilled the six-day holding period. You can withdraw multiple payouts or wait until more funds are available to withdraw in bulk.

That's it! If you have any questions or need assistance, don't hesitate to reach out to us.

Send us an email at **support@betterworld.org**.
We're always here to help!