

# Sponsorships Checklist



## STEP 1: GENERAL SETUP

- Add Account Details
- Set up Admin Users
- Review Account Rule Settings
- Disable Supporter Email during setup (optional)
- Review Admin Console

## STEP 2: ONLINE DONATIONS SETUP

- Set up Payment Gateway
- Donation Setup
- Donation Categories

## STEP 3: PORTAL SETUP

- Select Portal Theme
- Customize Portal details and branding
- Customize Menus
- Set up Places (optional)
- Set up Projects (optional)
- Set up additional Pages (optional)
- Review Donor Portal

## STEP 4: SPONSORSHIPS & SUPPORTERS

- Create Custom Fields for Sponsorships
- Set up Sponsorships and Share Types
- Create Custom Fields for Supporters

**STEP 4:**  
IMPORT YOUR  
RECORDS

- Import your Sponsorships
- Import your Sponsorship Images
- Import your Supporters
- Import your Donation History
- Transfer Supporter Payment Info into REACH

**STEP 5:**  
PREPARE FOR  
COMMUNICATION

- Review automated Email Templates
- Review Mail Merge Templates
- Review Account Rules
- Set up Site Integrations

**STEP 6:**  
REVIEW  
AVAILABLE  
FEATURES

- Campaigns
- Events
- Products (Online Store)
- Text to Give
- Trips
- Reports and Segments

**STEP 7:**  
PREPARE TO  
LAUNCH

- Review System Checks List
- Onboard Admin Users

**STEP 8:**  
ONBOARD YOUR  
SUPPORTERS

- Convert sponsorships from legacy to online
- Prepare Email to Supporters
- Re-enable Supporter Emails