

Setup 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
- Complete your Donation Setup
- Add a How'd You Hear About Us? field (Optional)
- Set up your 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: PREPARE FOR SPONSORSHIPS

- Review the Sponsorship Checklist

STEP 5:
SPONSORSHIPS
AND
SUPPORTERS

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

STEP 6:
IMPORT YOUR
RECORDS

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

STEP 7:
PREPARE FOR
COMMUNICATION

- Learn about our REACH System Emails
- Review/Edit your Email Templates
- Create Custom Email Templates (Optional)
- Set up Supporter Notifications (Optional)
- Set up Mail Merge Templates
- Review Text Message options
- Review Communications Preferences list
- Set up any Site Integrations
- Set up any Automations (Optional)

STEP 8:
REVIEW
AVAILABLE
FEATURES

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

STEP 9:
PREPARE TO
LAUNCH

- Review System Checks List
- Onboard Admin Users

STEP 10:
ONBOARD YOUR
SUPPORTERS

- Convert sponsorships from Legacy to Online
- Prepare Email to Supporters
- Re-enable Supporter Emails