

How to create a fundraising campaign

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Campaigns help you organize fundraising efforts and track progress toward goals.

Steps to create a campaign

1. Go to the **Campaigns** or **Fundraising** section.
2. Click **New Campaign**.
3. Enter the core information:
 - Campaign name (clear and specific)
 - Goal amount
 - Start date and end date
 - Short description or purpose
4. Set any additional options your organization uses (campaign type, designation/fund, appeal code, etc.).
5. Click **Save**.

After the campaign is created

You can:

- Record donations and pledges against it
- Track progress toward the goal
- Run reports filtered by that campaign

Best practice: Create a separate campaign for each distinct effort (annual appeal, gala, peer-to-peer drive, giving day, etc.). This keeps reporting clean and makes it easier to evaluate what worked.
