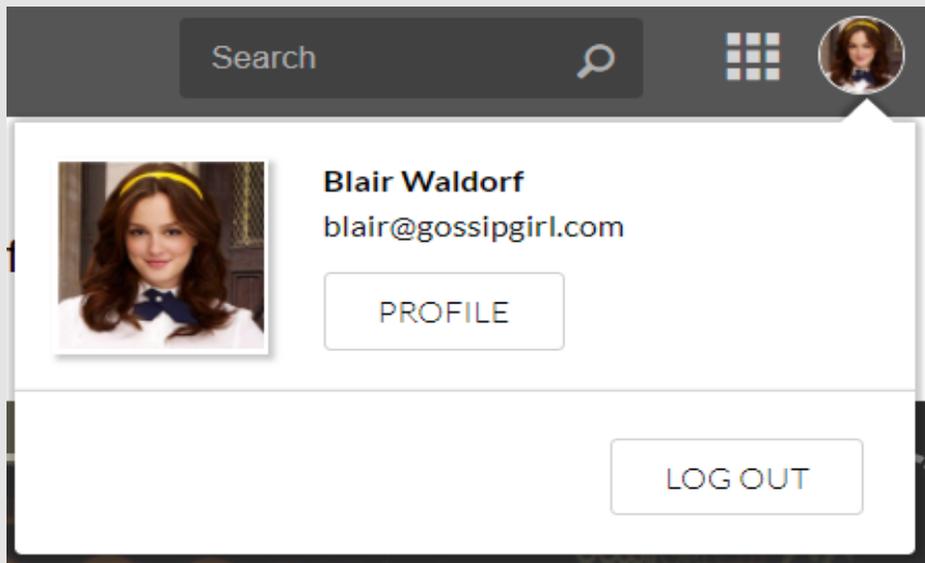


FUNDRAISER DASHBOARD



January 16, 2018

ACCOUNT PROFILE



The box to the left of your circle profile image will allow you to quickly enter into your Fundraiser Dashboard for any campaign(s) you are presently or have previously registered for. (The only exclusion is the event you are logged into)

In the upper right-hand corner of your page you will find your profile picture (or your initials if a picture has not been added). This will take you to your Profile or allow you to log-out. If you have registered another participant who is associated with your email address this is also where you will go to toggle between accounts.

Clicking on “Profile” will allow you to do the following:

- Update your contact information (shown)
- View all campaigns you have registered for associated with this non-profit
- Manage your email notifications. Email notifications refer to any email sent related to a campaign you have registered for. This includes donation notifications, goal updates or team activity. Email notifications can be managed on the campaign level.

A screenshot of a web browser displaying a user profile page. The page features a large profile picture of a woman on the left. To the right of the picture, the name 'Blair Waldorf' and email 'blair@gossipgirl.com' are displayed. Below this, there are three tabs: 'PROFILE', 'MY CAMPAIGNS', and 'NOTIFICATIONS'. The 'PROFILE' tab is active. The main content area contains a form with the following fields: 'First Name' (Blair), 'Last Name' (Waldorf), 'Email Address' (blair@gossipgirl.com), 'Password' (masked with dots), 'Confirm Password' (masked with dots), 'Address' (123 Hollywood), 'Apt/Ste/Unit' (empty), 'Country' (UNITED STATES), 'City' (Hollywood), 'State' (CA), 'Zip' (90210), and 'Phone' (empty). A blue 'Save' button is located at the bottom of the form.

FUNDRAISER DASHBOARD

The Fundraiser Dashboard is where fundraisers can monitor their personal fundraising activity as well as promote their page. Once registration is complete the fundraiser will be directed to a view that looks like this:

Welcome to My Page
Blair Waldorf

[DONATE](#)

DASHBOARD MY PAGE EMAIL CONTACT BOOK SHARE REPORTS AUTOPOST MY INFO

\$18 RAISED OF \$150 GOAL

Donations RECENT ALL TIME

20 21 22 23 24 25 26 27 28 29 30 31 01 02 03 04 05 06 07 08 09 10 11 12

CREATE OR JOIN TEAM

0 EMAILS SENT

Campaign Progress 36% complete

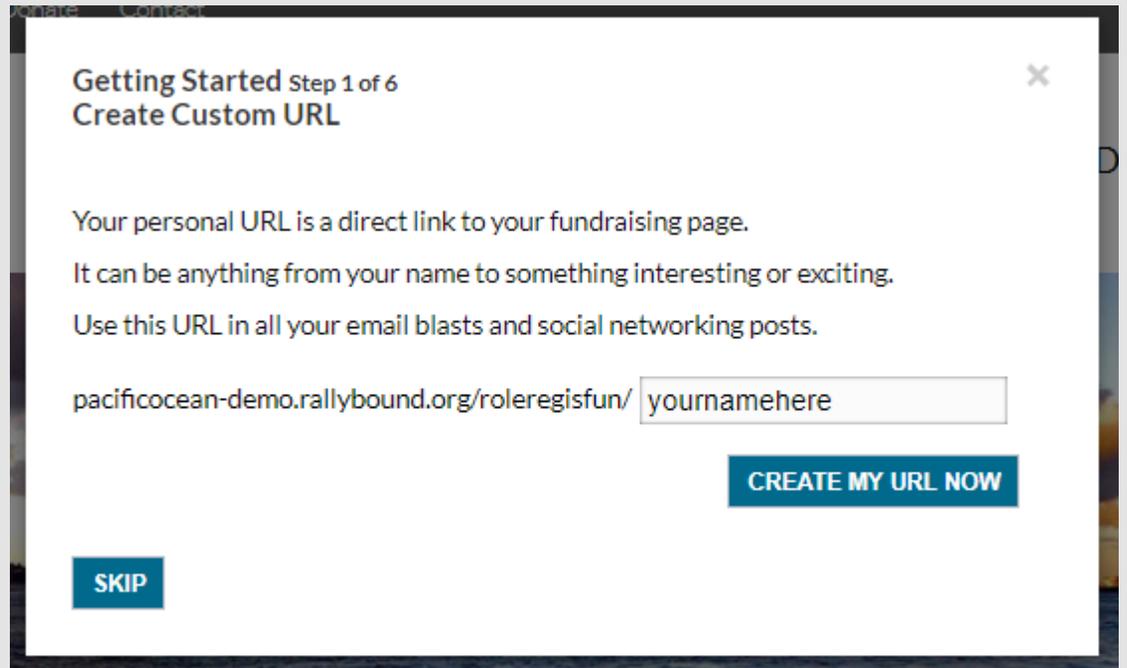
- Create Custom URL
- Create or Join a Team
- Upload Photo
- Personalize My Page
- Donate to Own Goal
- Import Your Contacts
- Send a Fundraising Email
- Connect to Your Social Networks
- Post a Message to a Social Friend
- Update Goal
- Update Account Details

Recent Donations [View all](#)

Blair Waldorf	1/12/2018	\$18.00	N/A
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FUNDRAISER DASHBOARD START-UP TASKS

After you have logged into the system you will be prompted with tasks to help jumpstart your campaign. These tasks will vary but common examples are to upload your personal photo, update your goal, create your custom URL or donate to your own goal. These are important tasks for you and the non-profit you are representing, intended to help maximize your fundraising efforts.



Getting Started Step 1 of 6
Create Custom URL

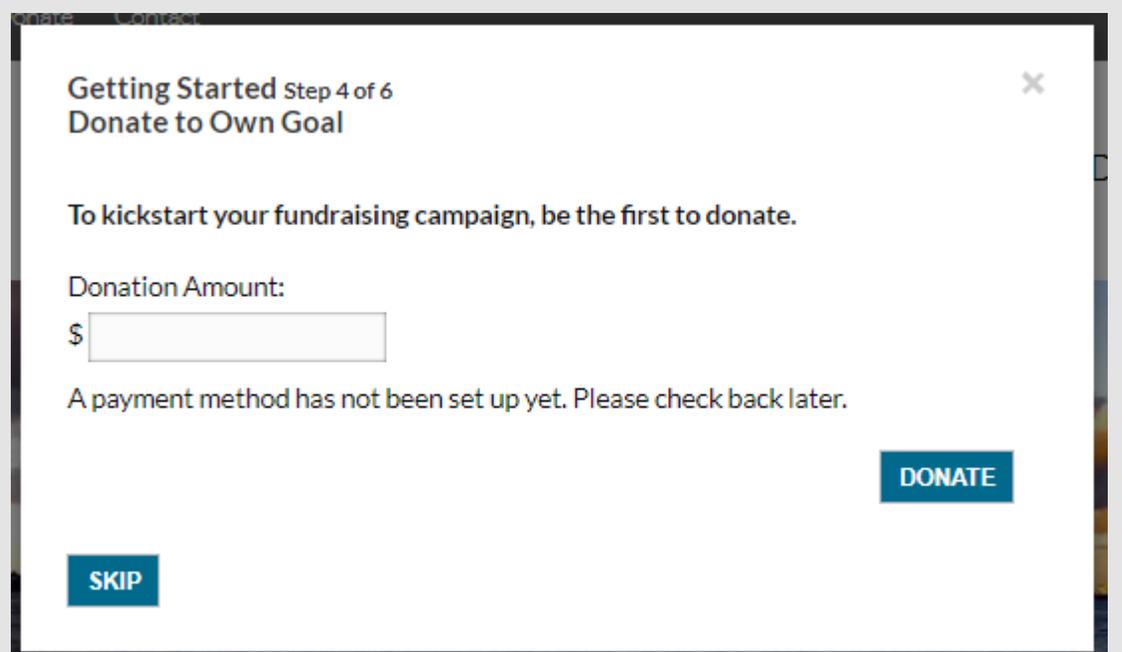
Your personal URL is a direct link to your fundraising page.
It can be anything from your name to something interesting or exciting.
Use this URL in all your email blasts and social networking posts.

pacificocean-demo.rallybound.org/roleregisfun/

[CREATE MY URL NOW](#)

[SKIP](#)

- 1) You can see how many steps exist by looking at the very top.
- 2) If you do not have information for that task you can choose to “Skip” and come back to it at a later time



Getting Started Step 4 of 6
Donate to Own Goal

To kickstart your fundraising campaign, be the first to donate.

Donation Amount:
\$

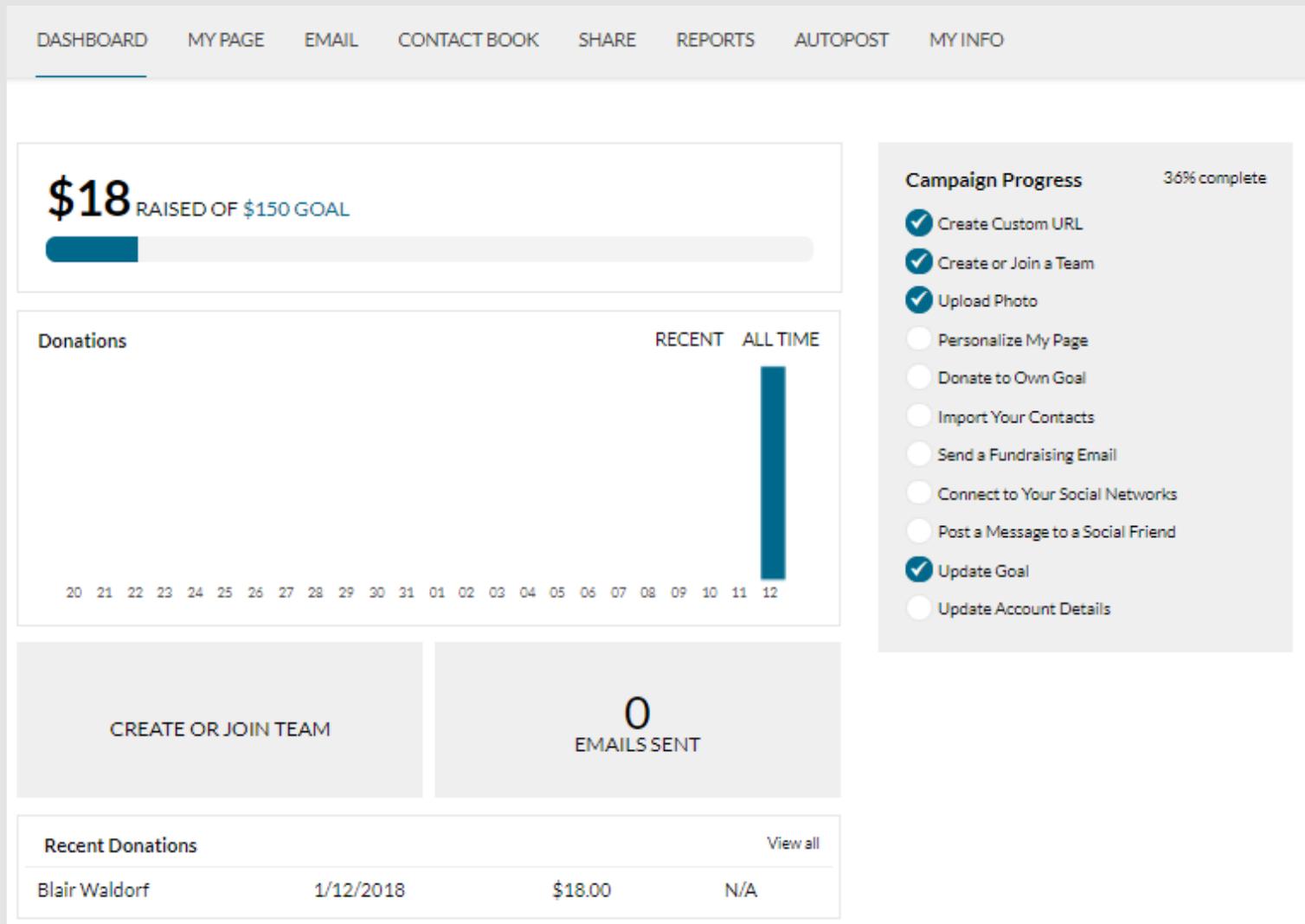
A payment method has not been set up yet. Please check back later.

[DONATE](#)

[SKIP](#)

FUNDRAISER DASHBOARD DASHBOARD VIEW

Now let's look at the view you will see once you've completed your Start-Up tasks.



Along the top are various tabs that contain fundraising tools. We'll dive into each of those tabs individually.

On the left hand side you will see graphs of your fundraising activity.

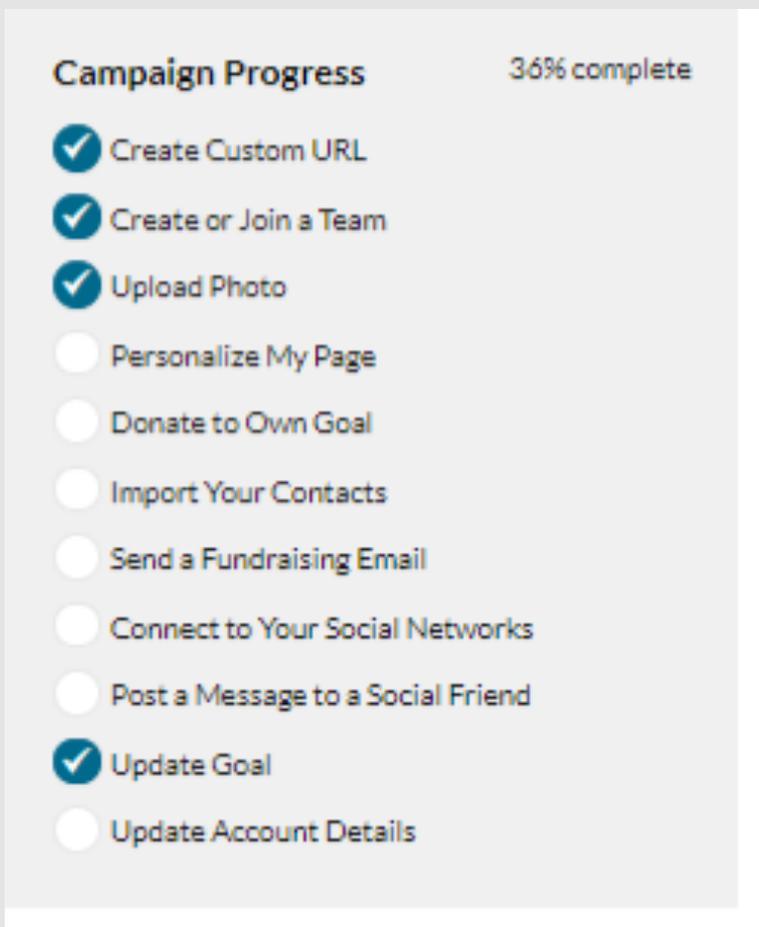
Underneath the charts is the option to "Create or Join Team". This button can be pushed if you are a solo fundraiser looking to create or join a team, or if you want to leave or switch teams. You can also invite others to join your team through this button.

To the right of "Create or Join Team" you can see how many emails you have sent. Remember, the more emails sent the greater odds you will meet your fundraising goal!

On the very bottom is a quick snapshot of donation detail. If you want to see additional detail click on "View All".

FUNDRAISER DASHBOARD CAMPAIGN PROGRESS

The “Campaign Progress” contain tasks (including Start-up Tasks) that are intended to maximize your fundraising efforts. Once complete, a blue checkbox will appear on the left.



Create Custom URL – Update the URL that will be distributed to your network. By default your campaign URL will contain a bunch of numbers. Create your own personal URL so it is simple to find you, and easy for you to remember.

Create or Join a Team - This task will allow you to Join a team, Create a team, Leave a team (Fundraise solo). Invite others to join your team.

Upload Photo – upload a profile picture from your computer or use your profile picture from your Facebook or Twitter account. This is the image that will appear on the front page of your site, on the bottom left of the hero image.

Personalize My Page – This will direct you to the front of your site to update what visitors will see. You will want to make this page authentic to who you are.

Donate to Own Goal – Lead by example and donate to your cause yourself.

Import Your Contacts – Selecting this task will take you to your contact book

Send a Fundraising Email – Reach out to your donors to encourage them to participate or thank them for their support

Connect to Your Social Networks – this will take you to the Auto-Post section where you can connect to your Facebook, Twitter and/or LinkedIn Account(s). Once you have connected posts will be made to the appropriate social site for various activities that take place.

Post a Message to a Social Friend – this will take you to the “Promote Via Social Media” section. In this area of your HQ you can send individual updates, tweets or messages to your network, either through social sites or through email.

Update Goal – once you meet your goal raise it! Clicking on this link will allow you to

Update Account Details – will allow you to update your information, e.g. email address, password, address and phone number.

FUNDRAISER DASHBOARD MY PAGE

Personalizing your page is one of the most important things you will do as a fundraiser. The non-profit will have added some defaults but you want to take the extra step to make this page yours!

The screenshot shows the 'MY PAGE' dashboard with a navigation bar at the top containing 'DASHBOARD', 'MY PAGE', 'EMAIL', 'CONTACT BOOK', 'SHARE', 'REPORTS', 'AUTOPOST', and 'MY INFO'. Below the navigation is a thank-you message: 'Thank you for visiting. This cause is very dear to me, and I'll appreciate all the support I can get! Together we can make a difference! Best - Blair'. To the right is an 'Edit My' section with icons for 'Message', 'URL', 'Goal', and 'Facebook ID'. Below that is a 'Donate' section with buttons for '\$25', '\$50', and '\$85'. On the left, there is a post creation prompt: 'Keep your fans engaged by posting a campaign update.' with icons for text, image, and video.

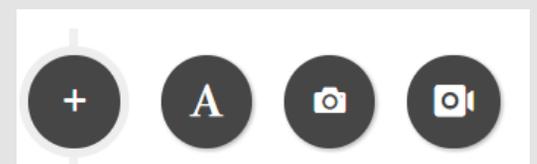
- Select “[A – Message](#)” to update your Header and the body of your message.
- [URL](#) – Update the URL that will be distributed to your network. Create your own personal URL so it is simple to find you, and easy for you to remember.

- [Goal](#) will allow you to update your fundraising goal.
- [Facebook ID](#) allows you to moderate comments submitted by others on the bottom of your page.

On the bottom of the page is the “Fundraiser Feed”, which is a living, open connection from the fundraiser to their network. Each update to the feed includes a date stamp with content; a text blog, image or video accompanying the post.

The screenshot shows a post in the 'Fundraiser Feed' dated 'JAN 15'. The post features a photograph of two young women, one in a red top and one in a blue top, smiling. Below the photo is the caption: 'My best friend Serena and I during our photoshoot with proceeds benefiting Pacific Ocean'.

To add a post you can click on any of these icons:



You can then add your content to captivate and engage your donors while you are fundraising!

FUNDRAISER DASHBOARD MY PAGE CAMPAIGN AND PROFILE IMAGE

On each personal and team fundraising page there are two types of photos:
(1) Profile Image and (2) Campaign Image

Below are definitions and instruction on how to update to personalize your page.

(1) The Profile Image is a picture of yourself or something that represents you. The image can be updated through a start-up task or by clicking the appropriate task in your campaign progress list. Alternatively you can update the image by following the same steps you would take to update your campaign image.

(2) The Campaign Image is the banner image that appears at the top of your page and runs horizontally from one side to the next. When you hover your mouse on this area you will see an icon that allows this image to be updated. The recommended picture dimensions are 2500 x 785 and will view best as medium-res .jpg.

It is not uncommon for your non-profit to provide a default profile image and one or more options to choose from for a campaign images. If an image appears feel free to use it. That's what it's there for! But also don't be shy about updating it. In most cases this is preferred.

The screenshot displays a fundraiser dashboard for Blair Waldorf. At the top, there is a large banner image (labeled '2') with a 'Select campaign image' button (labeled '2') and an 'Upload image' button (labeled '1'). Below the banner, there is a profile image (labeled '1') and a 'Welcome to My Page' message for Blair Waldorf. A 'DONATE' button is visible on the right. At the bottom, there is a navigation menu with links: DASHBOARD, MY PAGE, EMAIL, CONTACT BOOK, SHARE, REPORTS, AUTOPOST, and MY INFO.

FUNDRAISER DASHBOARD EMAIL

As a fundraiser your email must be verified before you are able to send emails out through the system. This is to help improve email deliverability. If your email has not been verified the following view will appear on the “Email” tab.

Please verify your email address to enable email tools.

[Send verification email](#)

The screenshot displays the 'ADD EMAIL' section of the Fundraiser Dashboard. At the top, there are two buttons: 'PROMOTE' and 'UPDATE MY DONORS'. Below these is a large blue button labeled 'ADD FROM CONTACT BOOK'. Underneath, the 'Add Friends Manually:' section contains two input fields for 'Email' and 'Greeting', followed by another 'ADD EMAIL' button. A 'Template:' dropdown menu is set to 'None - Type Own'. A note below reads: 'Note: please review and edit the email before sending.' The 'Subject:' field is empty. The 'Message:' section features a rich text editor with a toolbar containing icons for source, undo, redo, bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, image, table, and link preview. Below the toolbar are dropdown menus for 'Format', 'Font', and 'Size', along with color and background color pickers. The message body contains the text: 'Please visit my personal page <https://pacificocean-demo.rallybound.org/rolereqisfun/Member/MyPage1751655/Blair-Waldorf>'. At the bottom, there are two buttons: 'Save Template' and 'Review Email'.

Send emails directly from your contact book or by manually entering their email address. You can also send messages directly to your donors by selecting “Update my Donors”.

Once you have your audience you can select an available email template (a preset email message) by clicking the down arrow under the template box. When a template is selected a subject and message will be entered which can then be customized.

Alternatively you can create your own email message from scratch. If it’s a message you think you’ll re-use you can create your own email template by selecting “Save Template”.

When your message is complete select “Review Email” which will allow you to see what your message will look like to recipients.

If you’re stuck try emailing your closest friends first. Once you begin to receive donations you will gain momentum. Sending emails is a powerful tool that can be used to evangelize the message for a mission you care about!

FUNDRAISER DASHBOARD CONTACT BOOK

This tab will allow you to import contacts so you can start promoting your campaign.

+ IMPORT CONTACTS ⚙️ ACTIONS ▼

<input type="checkbox"/>	First Name	Last Name	Email Address	Last Emailed	Greeting
No contacts yet. Click here to add one manually, or click here to import them from your email client.					

When you select “+IMPORT CONTACTS” you will have the option of importing your contacts from any of the sources below. You can also upload contacts from an excel file in a CSV format.

Import Contacts

Import your contacts from the email providers below. Simply click a provider to start.
For a CSV Template, [click here](#).

Gmail Outlook.com Microsoft Outlook
Aol. LinkedIn YAHOO! Mail
iCloud Apple Contacts Upload CSV

Contacts can also be added manually by selecting “[click here](#)” and entering the information below:

Add a New Contact

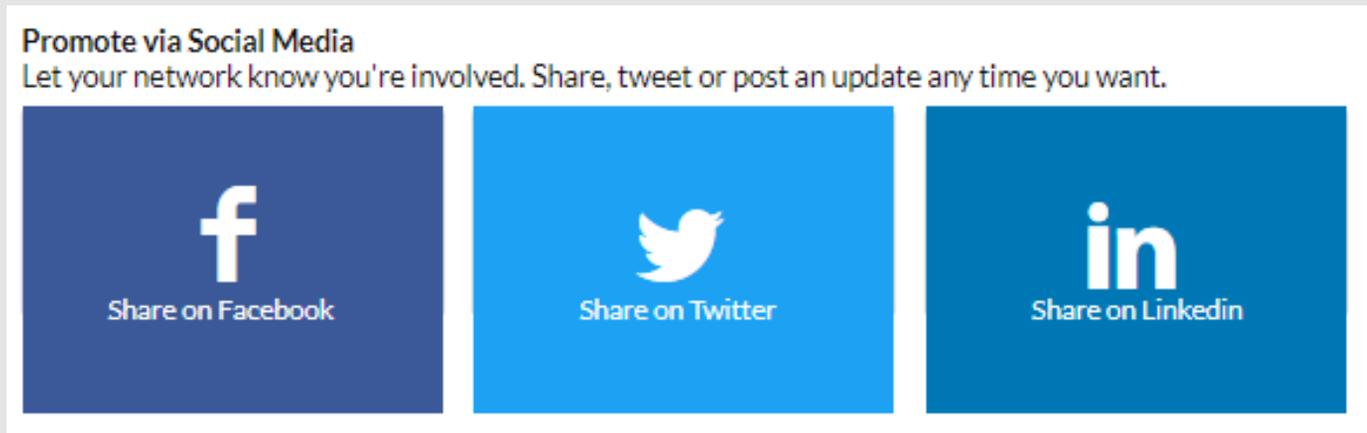
First Name Last Name Email

Greeting

ADD

FUNDRAISER DASHBOARD SHARE AND AUTO-POST

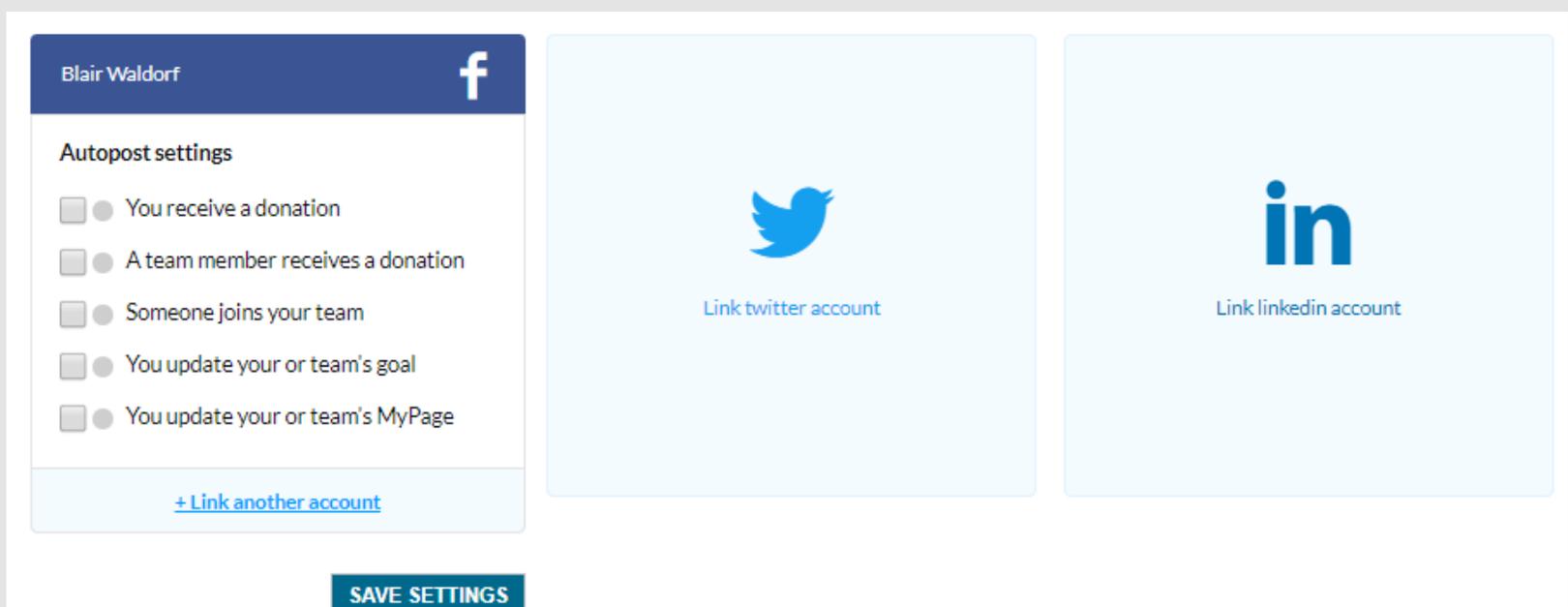
This tab will allow you to share your personal fundraising page through any of the social networking sites below:



If you are already logged into Facebook, Twitter or LinkedIn, clicking on the specific icon will trigger a pop-up confirming your credentials.

You will then have the option of customizing your message before completing your social media post.

Through the “Auto-Post” tab you can configure settings for each of these social sites to post automatically when a specific action takes place. To set-up social auto-posts you will need to configure the auto-post settings. Make sure once this is done you hit save.



FUNDRAISER DASHBOARD REPORTS CHECK AND CASH DONATIONS

Here you can you can access reports on your personal fundraising; if you are part of a team you can see activity on your team members fundraising activity.

My Fundraising Report [+ ENTER OFFLINE DONATION](#)

DONATIONS MADE TOWARD YOUR GOAL [Download as CSV](#)

Donor Name	Date Received	Amount	Status	Type	Recurring	Action
Blair Waldorf	1/12/2018	\$18.00	Verified	Registration	No	N/A

DONATIONS MADE TOWARD YOUR TEAM'S GOAL [Download as CSV](#)

Donor Name	Date Received	Amount	Status	Type	Toward User	Action
Dany Williams	1/15/2018	\$18.00	Verified	Registration	Dany Williams	N/A

Any report can be downloaded. These are valuable tools, especially if you are participating in an event every year as you can draw on past supporters to help you meet your current goal.

When you receive a check or cash donation, or someone pledges (meaning promises) to donate to your cause, you want to track this. We call these “offline donations” because they are not processed online. You can enter an offline donation by selecting the button in the upper right hand corner. The following view will then appear.

Offline donations will initially be considered “unverified” donations. They will only become verified when the program Administrator verifies them. This means these donations will not count towards your goal until they become verified. You can check on the status by looking under “Status” on your fundraising report.

If a donation is entered in error, you will have the ability to delete if it is in an unverified state.

Enter Donation ✕

First Name Last Name Keep name anonymous

Address Apt

Country

City State Zip

Email In honor of

Donation Type

[SUBMIT DONATION](#)

FUNDRAISER DASHBOARD MY TEAM

If you are on a team you can find your team information through the “My Team” tab.

	<u>Blair Waldorf</u>	Raised to date \$18.00	Personal Goal \$150.00	Team Information	
	<u>Serena Van der woodsen</u>	Raised to date \$18.00	Personal Goal \$150.00	Team Name:	Gossip Girls
				Total Users:	2
				Total Pending Users:	0
				Team Goal:	\$300.00
				Amount Raised:	\$36.00
				<u>Add as co-captain</u>	

This view will provide the names of all team members, along with how much has been raised and what their individual goal is.

The name of each team member is a hyperlink to their personal fundraising page. This can be an effective tool for team captains to encourage their team members and provide guidance on the best way to set-up their personal page.

The team captain will also have the ability to turn team members into “co-captains”.

To the right is a summary of team information, to include the number of users, any pending users (those who have been invited but have not logged in), the collective team goal and the amount that has raised.

In some instances if a donation is made to a team and not an individual the amount raised for a team will be different from the individual totals

FUNDRAISER DASHBOARD MY INFO

“My Info” will provide a summary of the fundraisers role selected during the registration process. From this view the fundraiser will also be able to register additional participants.

The screenshot shows the 'MY INFO' section of a fundraiser dashboard. At the top, a navigation bar includes links for DASHBOARD, MY PAGE, EMAIL, CONTACT BOOK, SHARE, REPORTS, AUTOPOST, MY TEAM, and MY INFO. Below the navigation bar, there are three main buttons: 'Your details' (highlighted with a blue arrow), 'Add friends', and '\$0'. To the right of these buttons is a 'COMPLETE REGISTRATION' button. The main content area is divided into two columns. The left column features a profile card for 'Blair Waldorf' with a photo. Below the photo, there are two toggle switches: 'Attendee' (set to YES) and 'Fundraiser' (set to YES). A 'Subtotal' of '\$18' is displayed next to the 'Attendee' toggle. Below the 'Fundraiser' toggle, the 'Goal Amount' is listed as '\$150'. The right column contains a large circular icon with a plus sign and the text 'Register another user'.

To the right of “My Info” are three lines that you can click on. This in turn will open a menu allowing you to quickly toggle between any of the tabs reviewed in this guide.

The screenshot shows a vertical menu titled 'MY INFO' with a hamburger menu icon to its right. The menu items are: DASHBOARD, MY PAGE, EMAIL, CONTACT BOOK, SHARE, REPORTS, AUTOPOST, MY TEAM, and MY INFO. The 'MY INFO' item is highlighted with a blue underline.