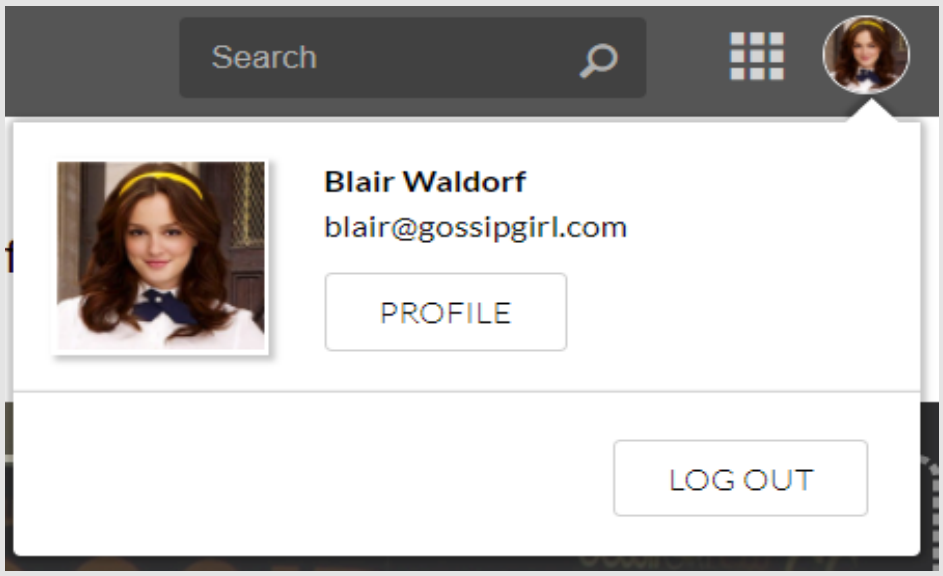
FUNDRAISER DASHBOARD

January 16, 2018

ACCOUNT PROFILE

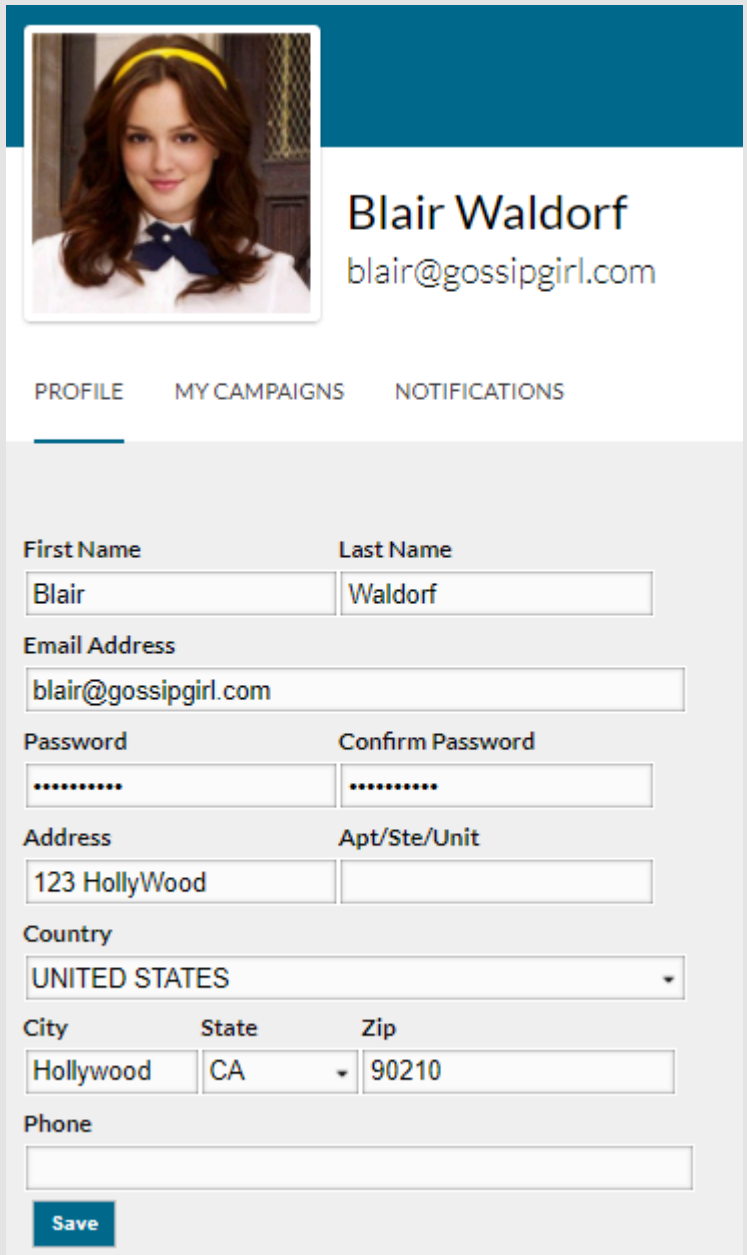


The box to the left of your circle profile image will allow you to quickly enter into your Fundraiser Dashboard for any campaign(s) you are presently or have previously registered for. (The only exclusion is the event you are logged into)

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.

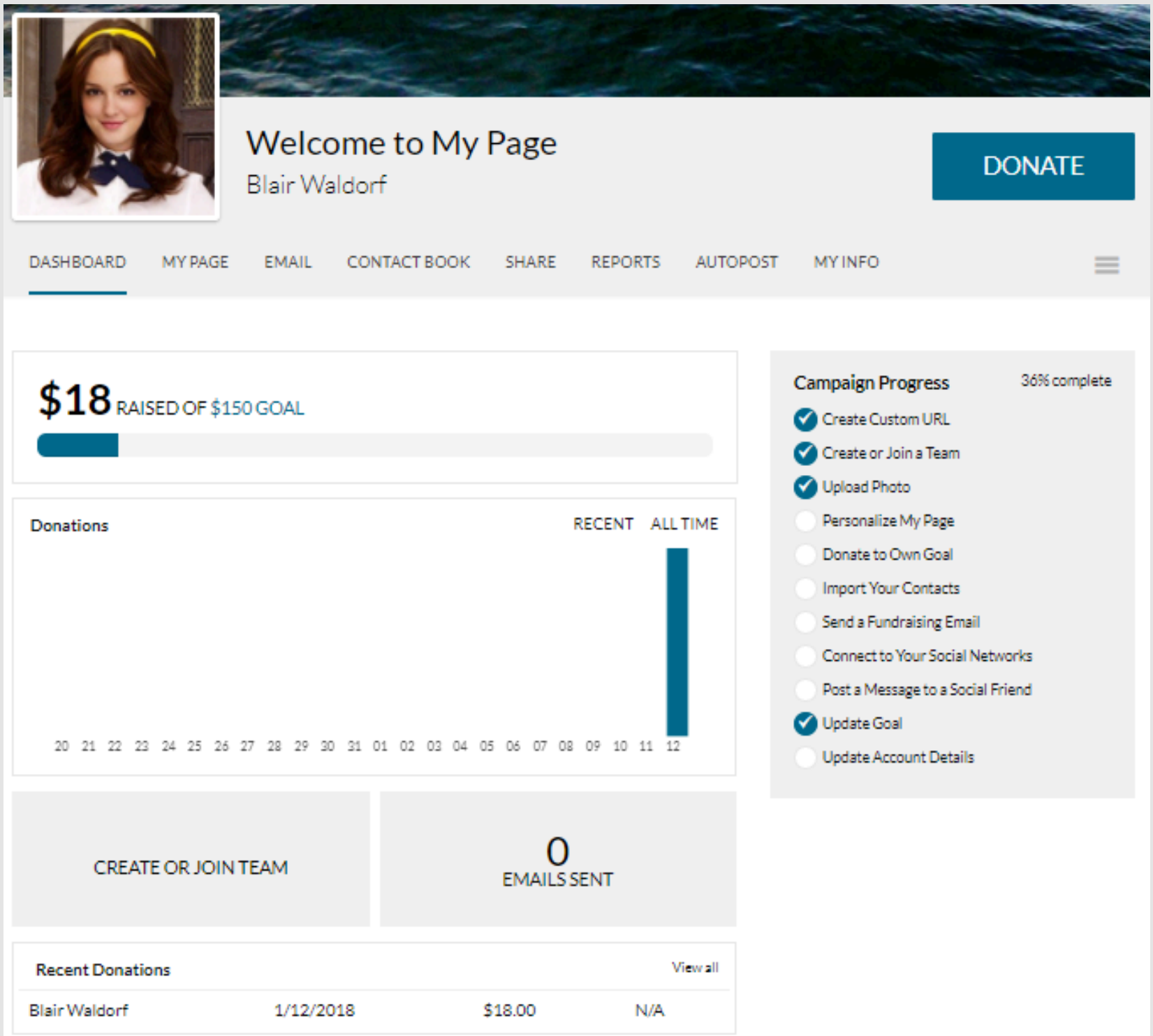
Clicking on “Profile” will allow you to do the following:

- 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.



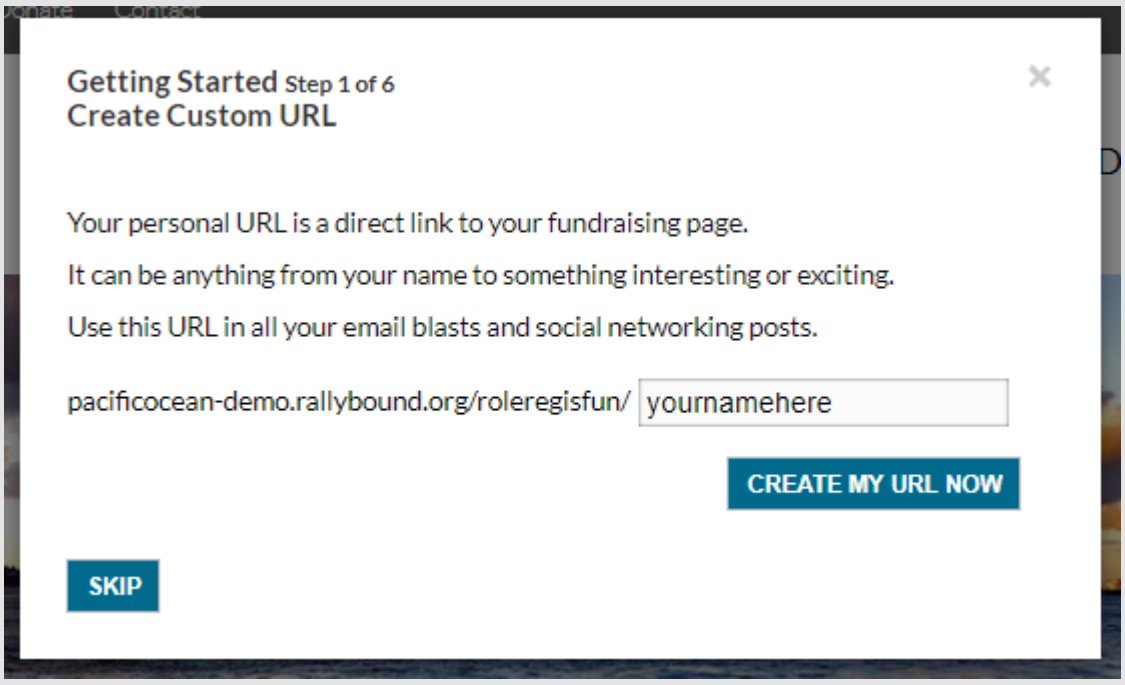
FUNDRAISER DASHBOARD

The Fundraiser Dashboard is where 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:

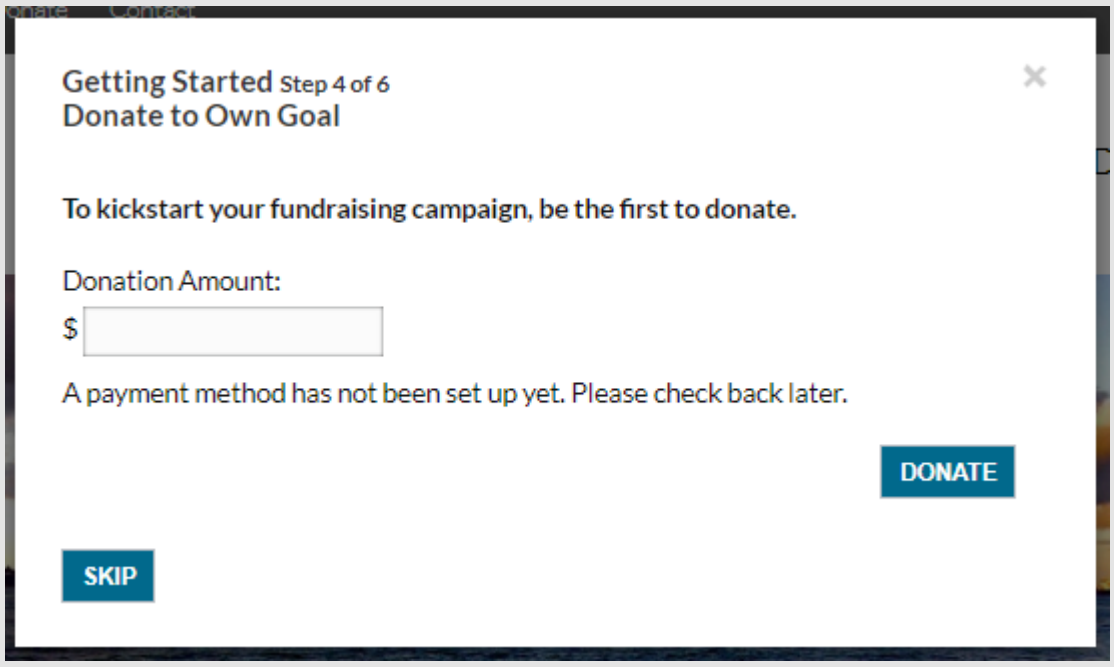


FUNDRAISER DASHBOARD START-UP TASKS

After you have logged into the system you will be prompted with tasks to help jump-start 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.

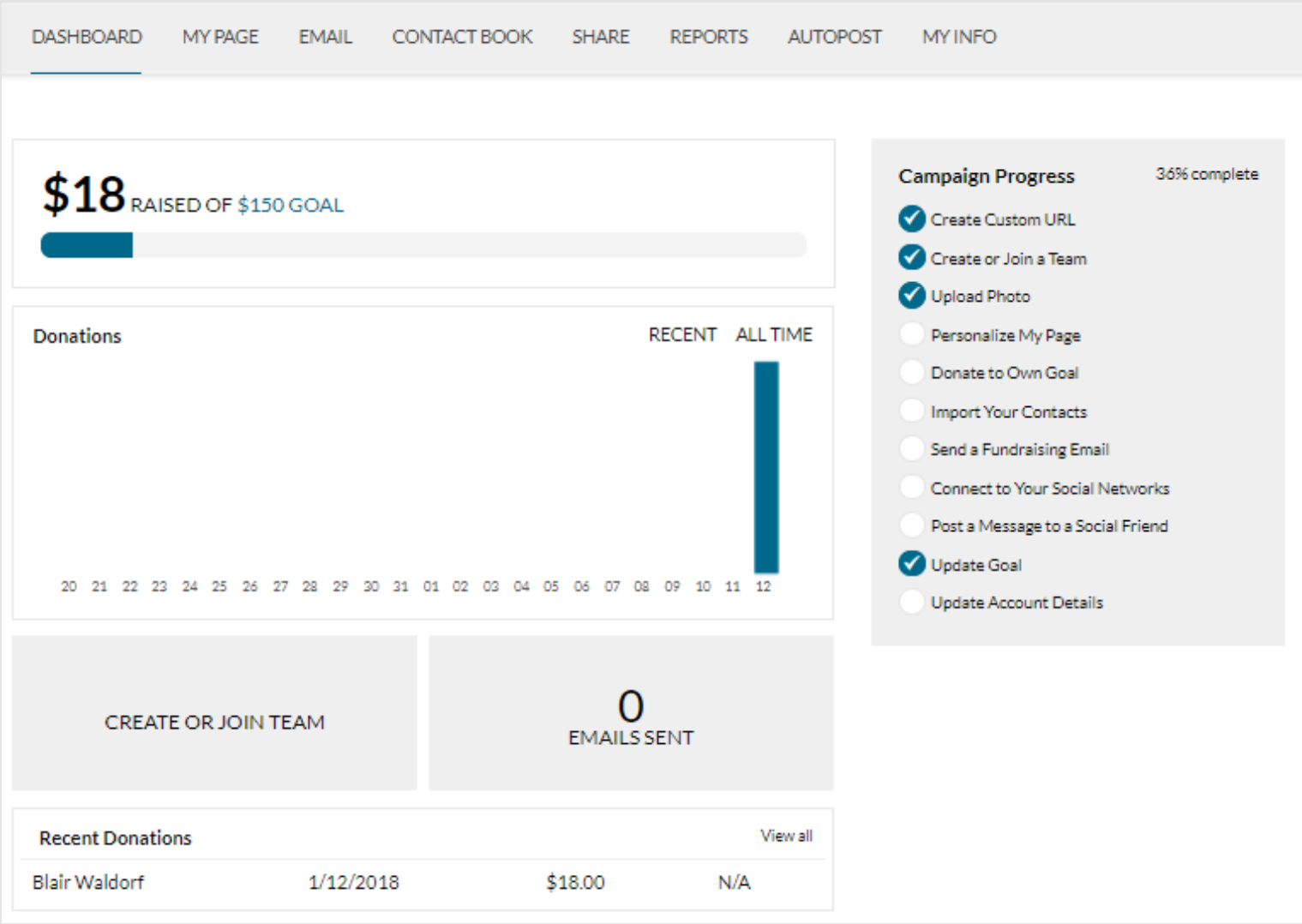


1) You can see how many steps exist by looking at the very top.
2) If you do not have information for that task you can choose to “Skip” and come back to it at a later time



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.

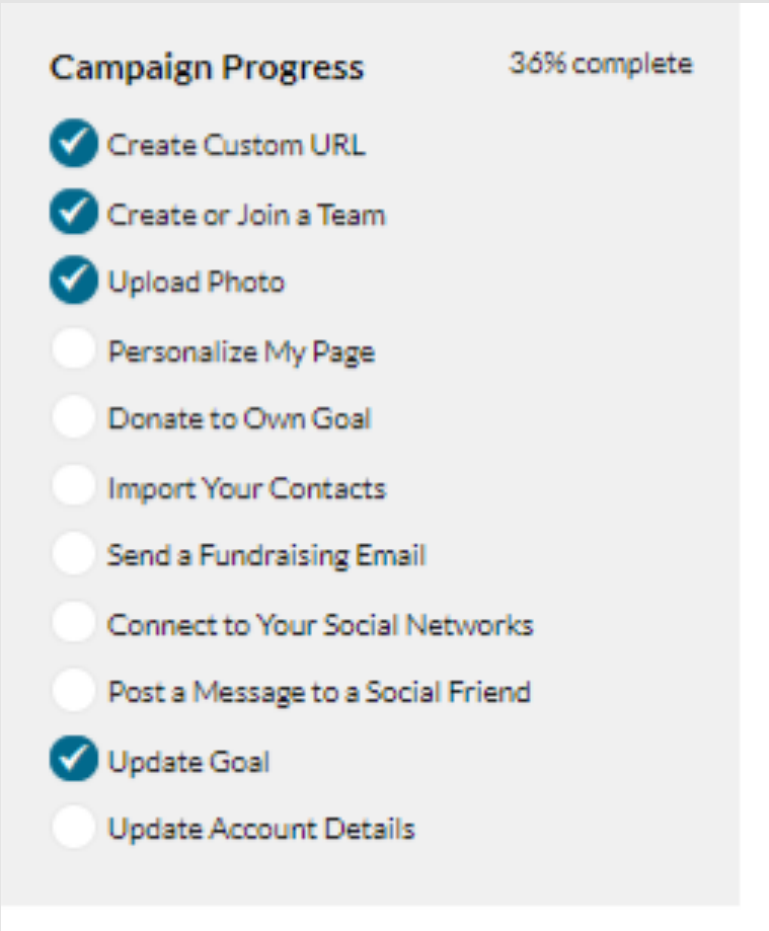
Underneath the charts is the option to "Create or Join Team". This button can be pushed if you are a solo fundraiser looking to create or join a team, or if you want to leave or switch teams. You can also invite others to join your team through this button.

To the right of "Create or Jon 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.

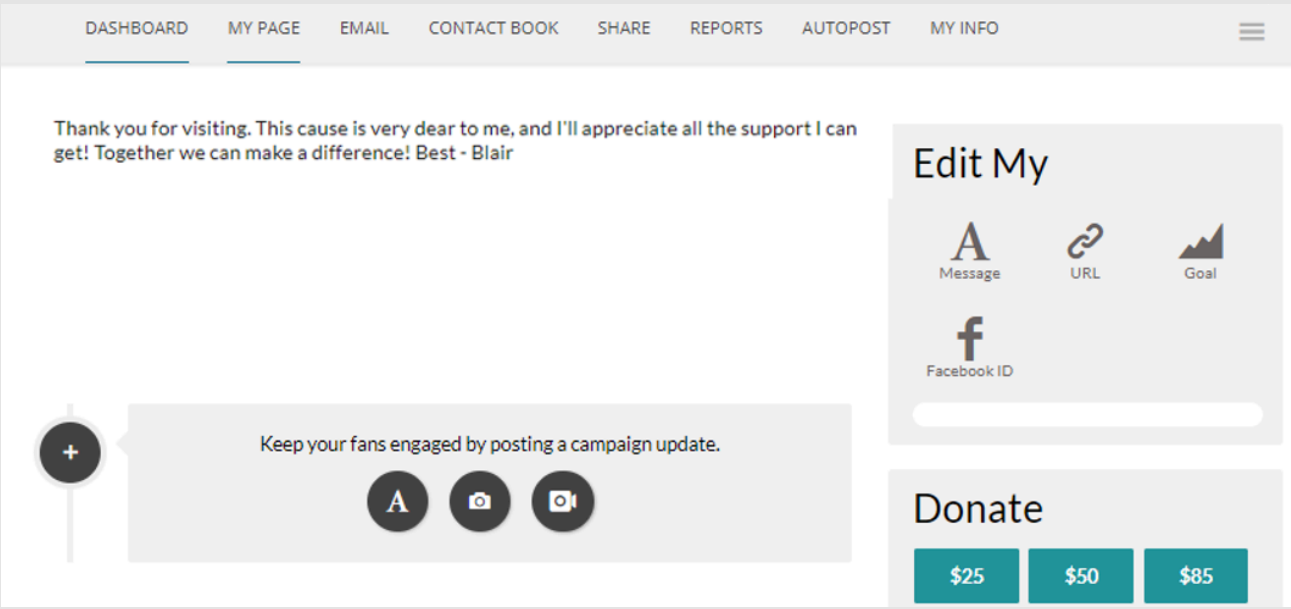
Post a Message to a Social Friend – this will take you to the "Promote Via Social Media" section. In this area of your HQ you can send individual updates, tweets or messages to your network, either through social sites or through email.

Update Goal – once you meet you 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

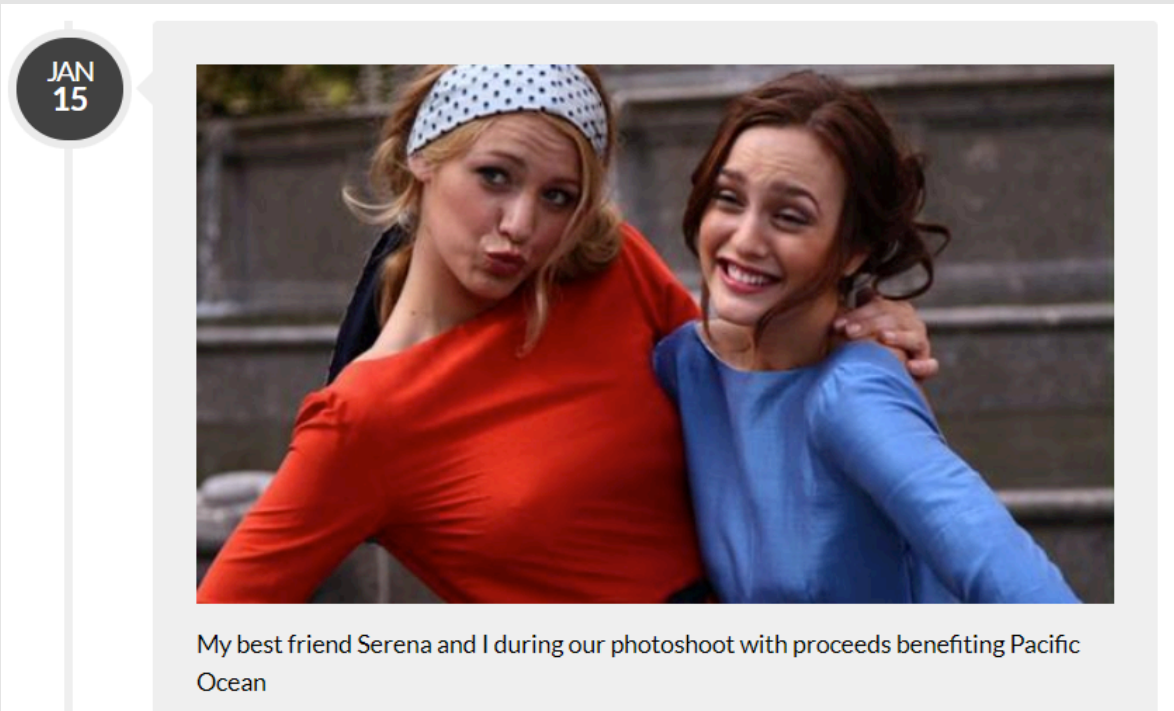
Personalizing your page is one of the most important things you will do as a fundraiser. The non-profit will have added some defaults but you want to take the extra step to make this page yours!



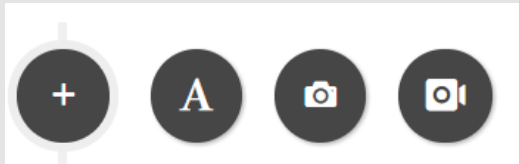
- Select "A – Message" to update your Header and the body of your message.
- URL – Update the URL that will be distributed to your network. Create your own personal URL so it is simple to find you, and easy for you to remember.

- 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.



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.

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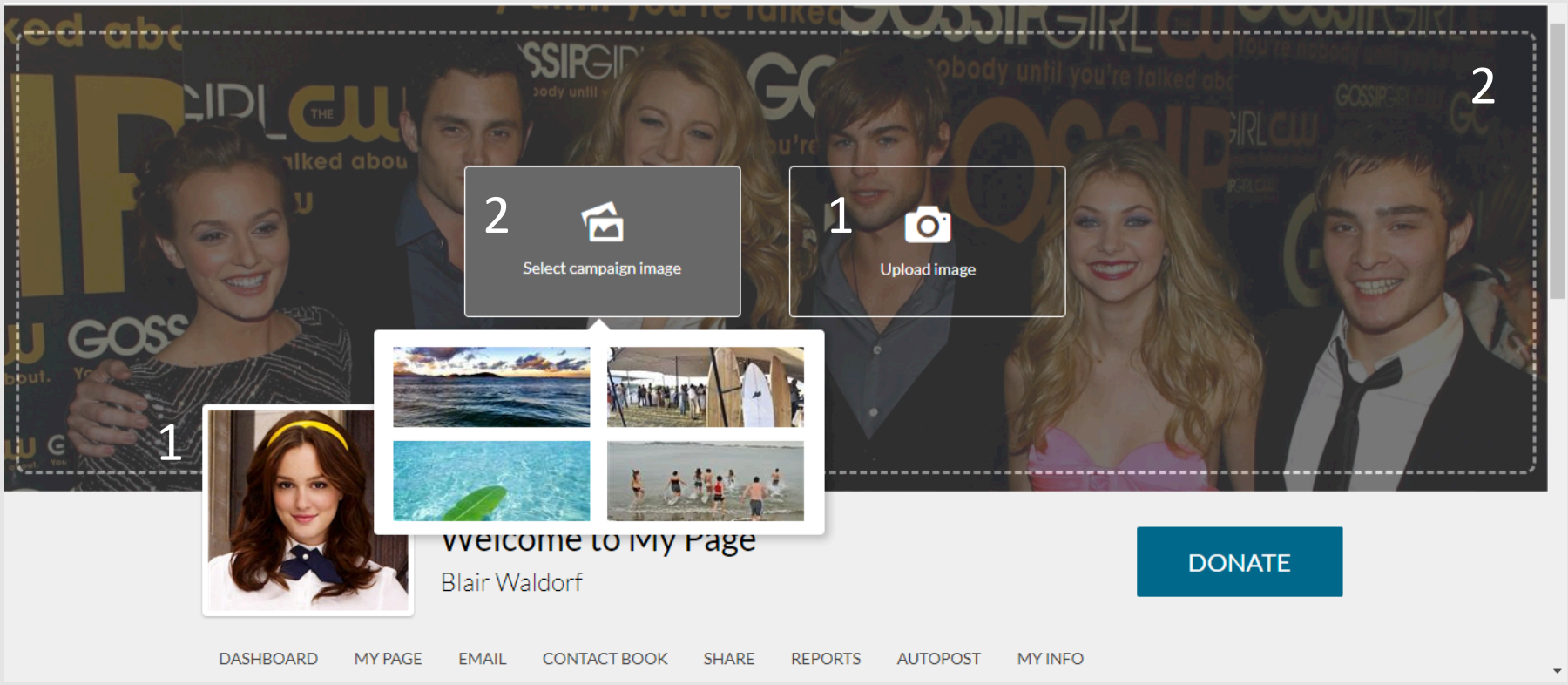
(1) The Profile Image is a picture of yourself or something that represents you. The image can be updated through a start-up task or by clicking the appropriate task in your campaign progress list. Alternatively you can update the image by following the same steps you would take to update your campaign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

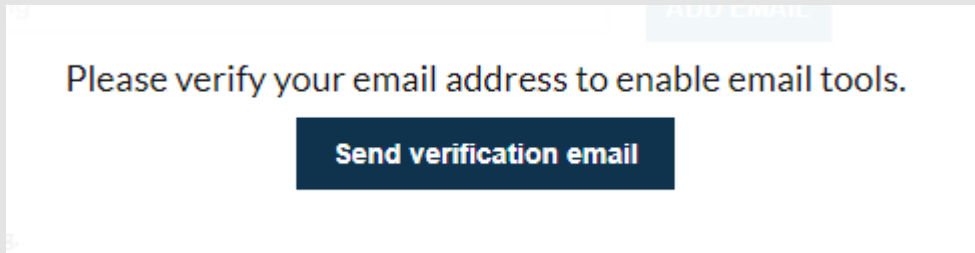
(2)The Campaign Image is the banner image that appears at the top of your page and runs horizontally from one side to the next. When you hover your mouse on this area you will see an icon that allows this image to be updated. The recommended picture dimensions are 2500 x 785 and will view best as medium-res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

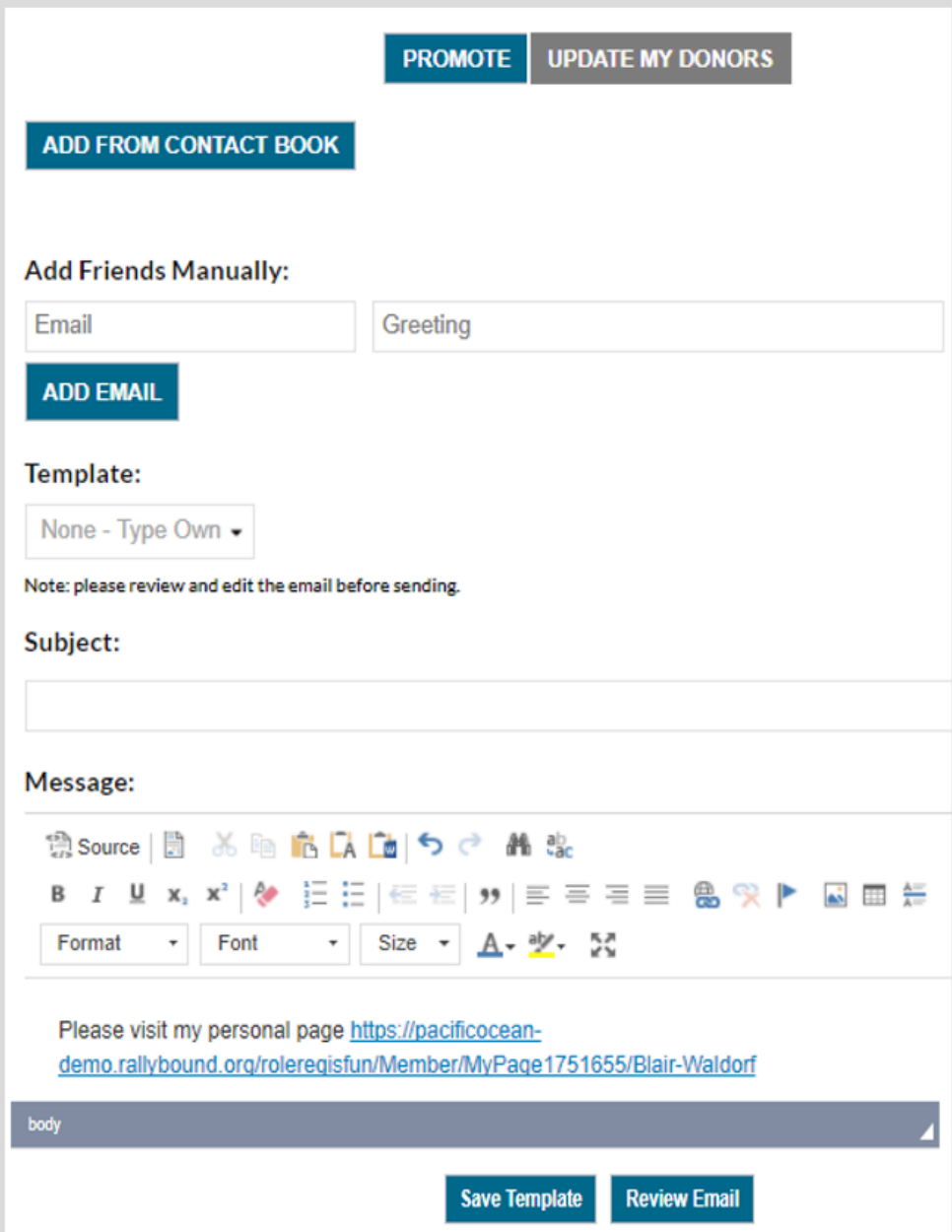
It is not uncommon for your non-profit to provide a default profile image and one or more options to choose from for a campaign images. If an image appears feel free to use it. That's what it's there for! But also don't be shy about updating it. In most cases this is preferred.



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.





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.

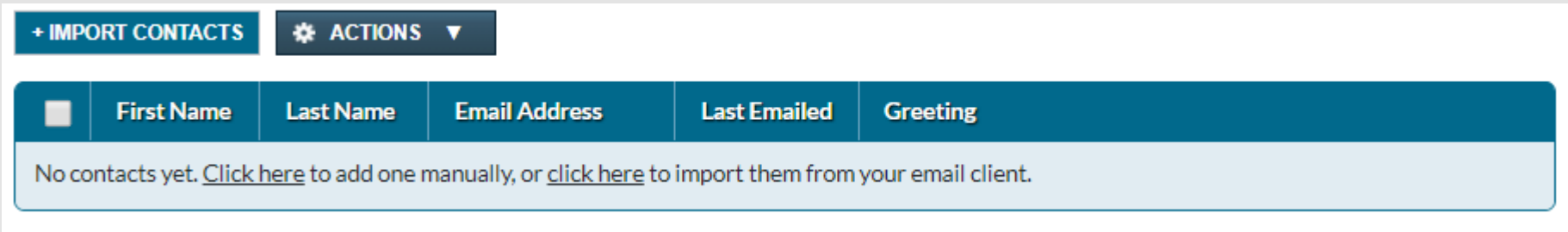
Alternatively you can create your own email message from scratch. If it's a message you think you'll re-use you can create your own email template by selecting "Save Template".

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

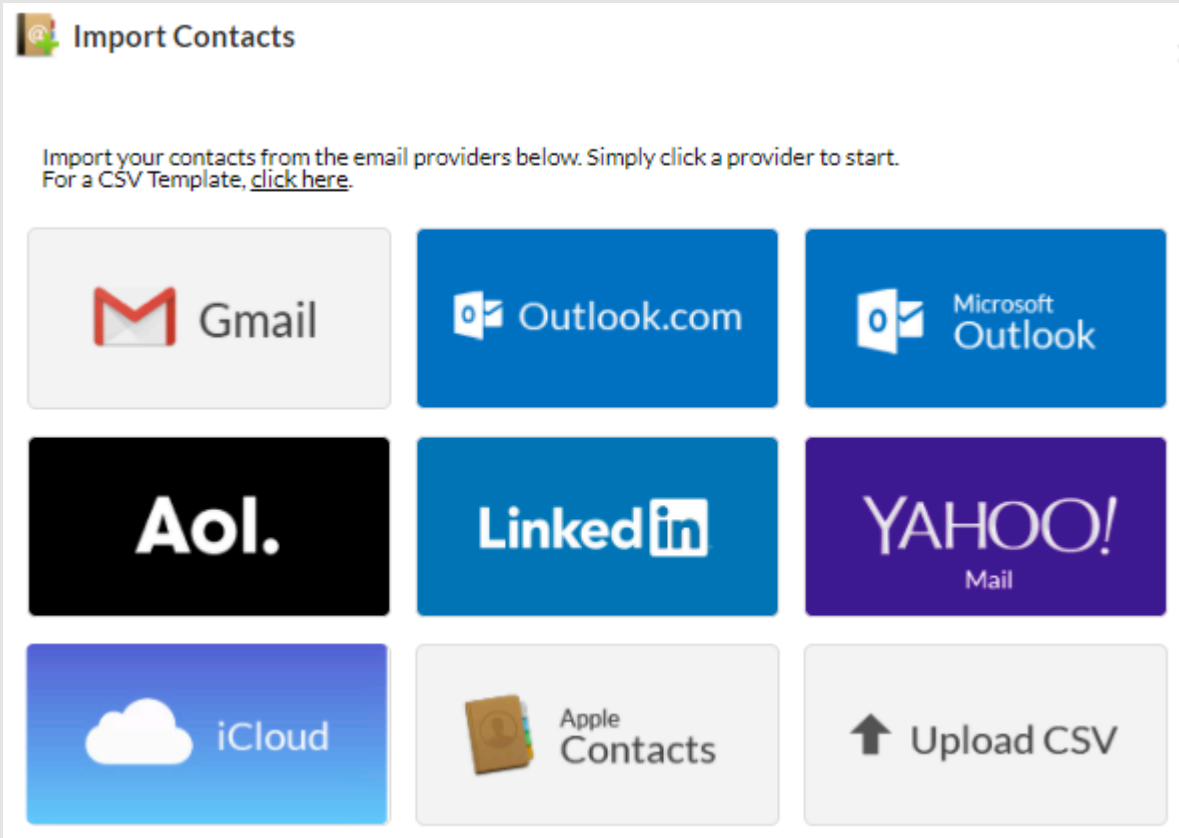
If you're stuck try emailing your closest friends first. Once you begin to receive donations you will gain momentum. Sending emails is a powerful tool that can be used to evangelize the message for a mission you care about!

FUNDRAISER DASHBOARD CONTACT BOOK

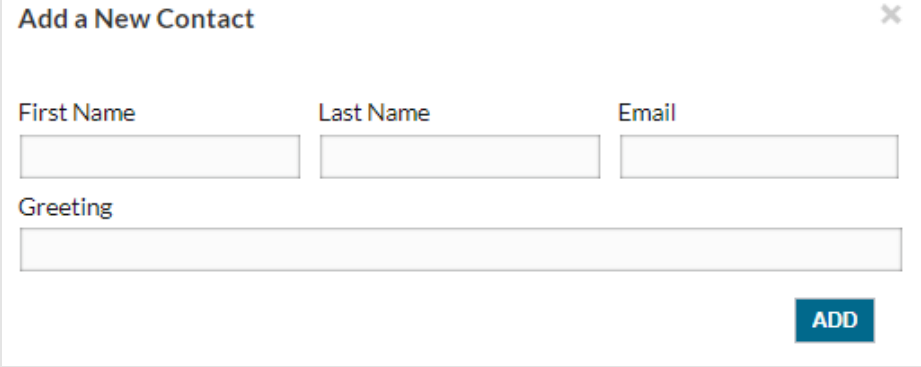
This tab will allow you to import contacts so you can start promoting your campaign.



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.

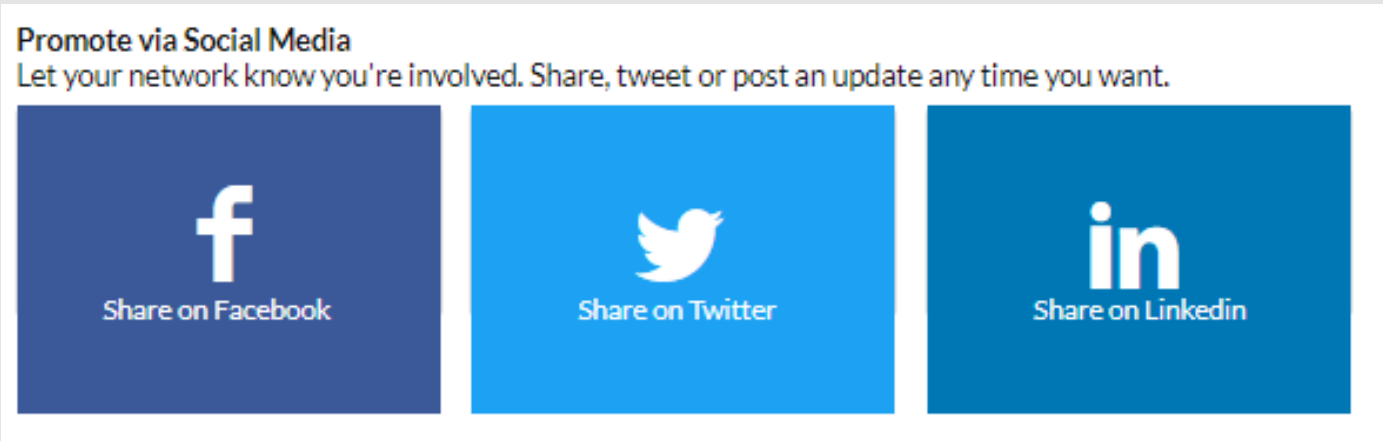


Contacts can also be added manually by selecting “**click here**” and entering the information below:



FUNDRAISER DASHBOARD SHARE AND AUTO-POST

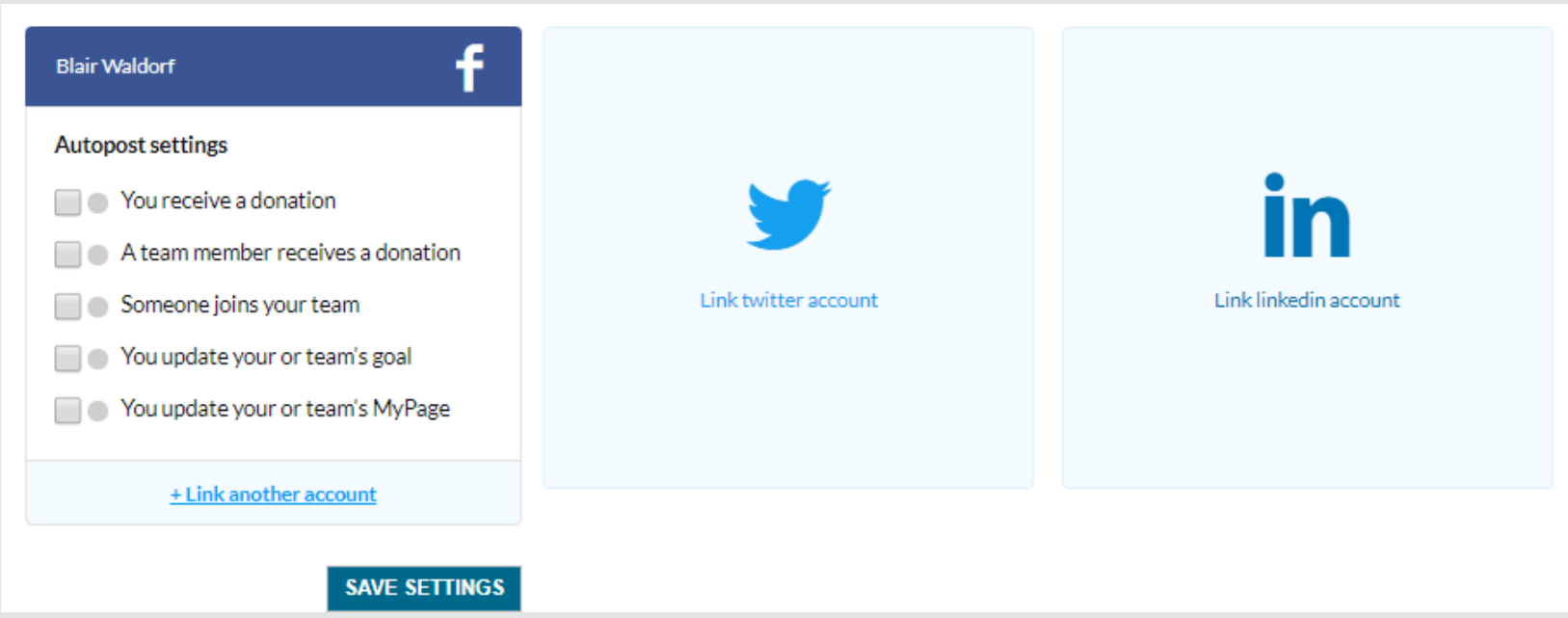
This tab will allow you to share your personal fundraising page through any of the social networking sites below:



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

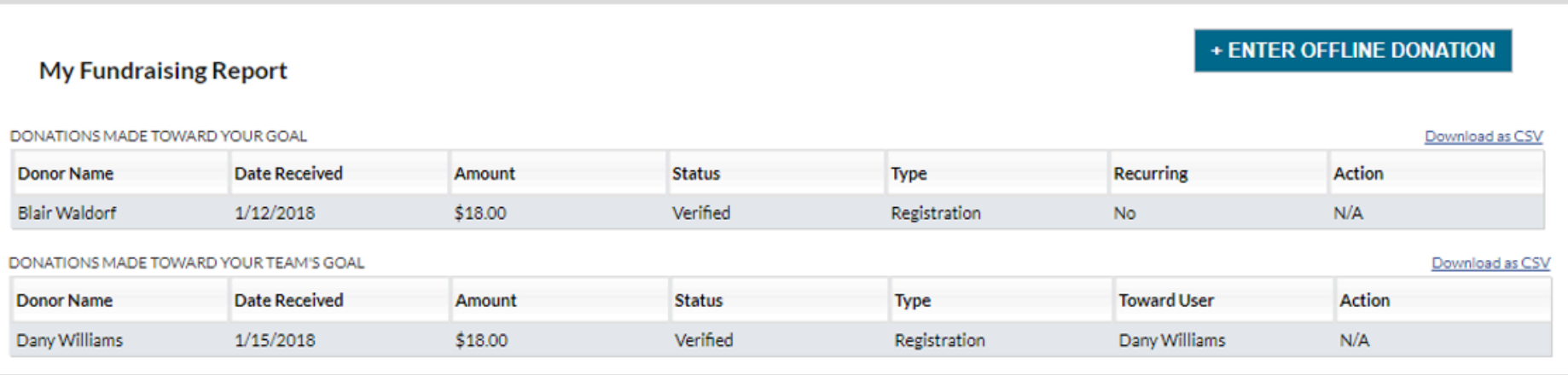
You will then have the option of customizing your message before completing your social media post.

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

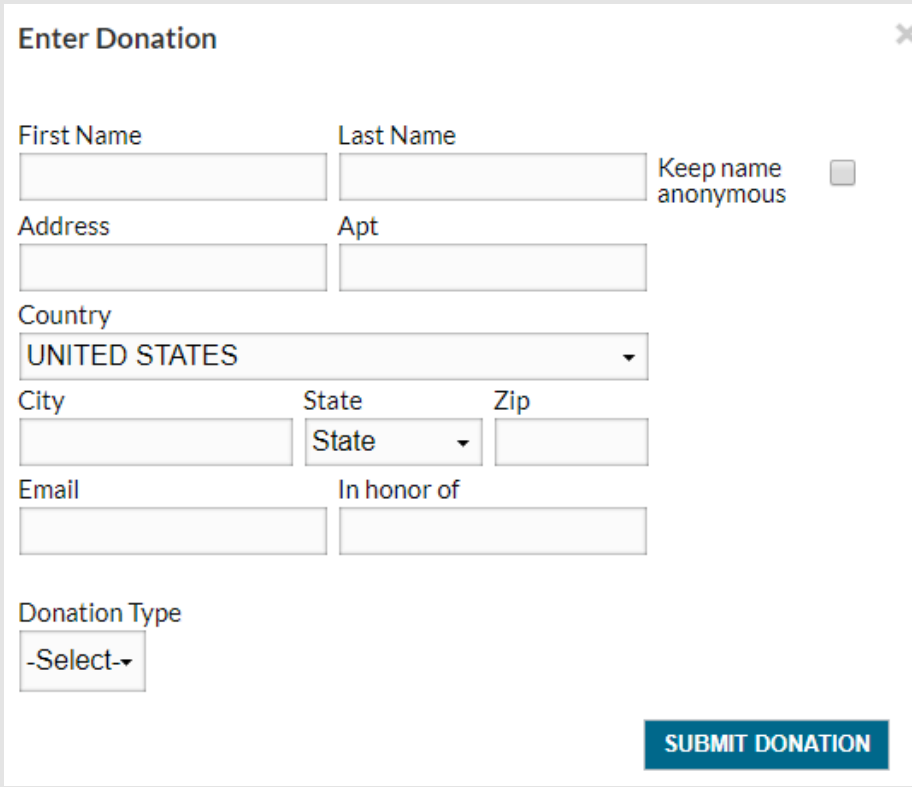
Donor Name	Date Received	Amount	Status	Type	Toward User	Action
Dany Williams	1/15/2018	$18.00	Verified	Registration	Dany Williams	N/A

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.

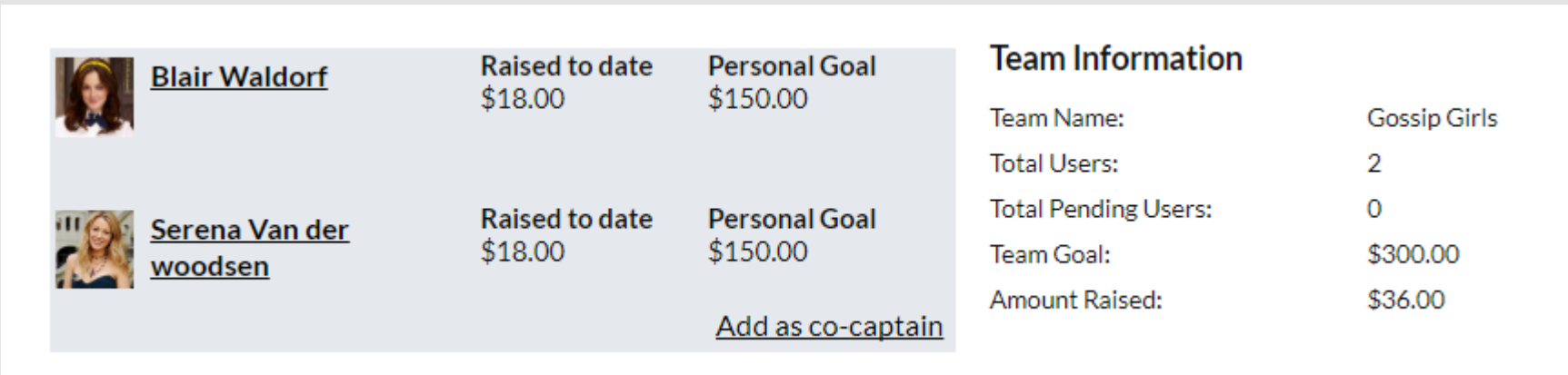


Enter Donation

First Name
Last Name
Keep name anonymous
Address
Apt
Country
UNITED STATES
City
State
State
Zip
Email
In honor of
Donation Type
-Select-
SUBMIT DONATION

FUNDRAISER DASHBOARD
MY TEAM

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



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.

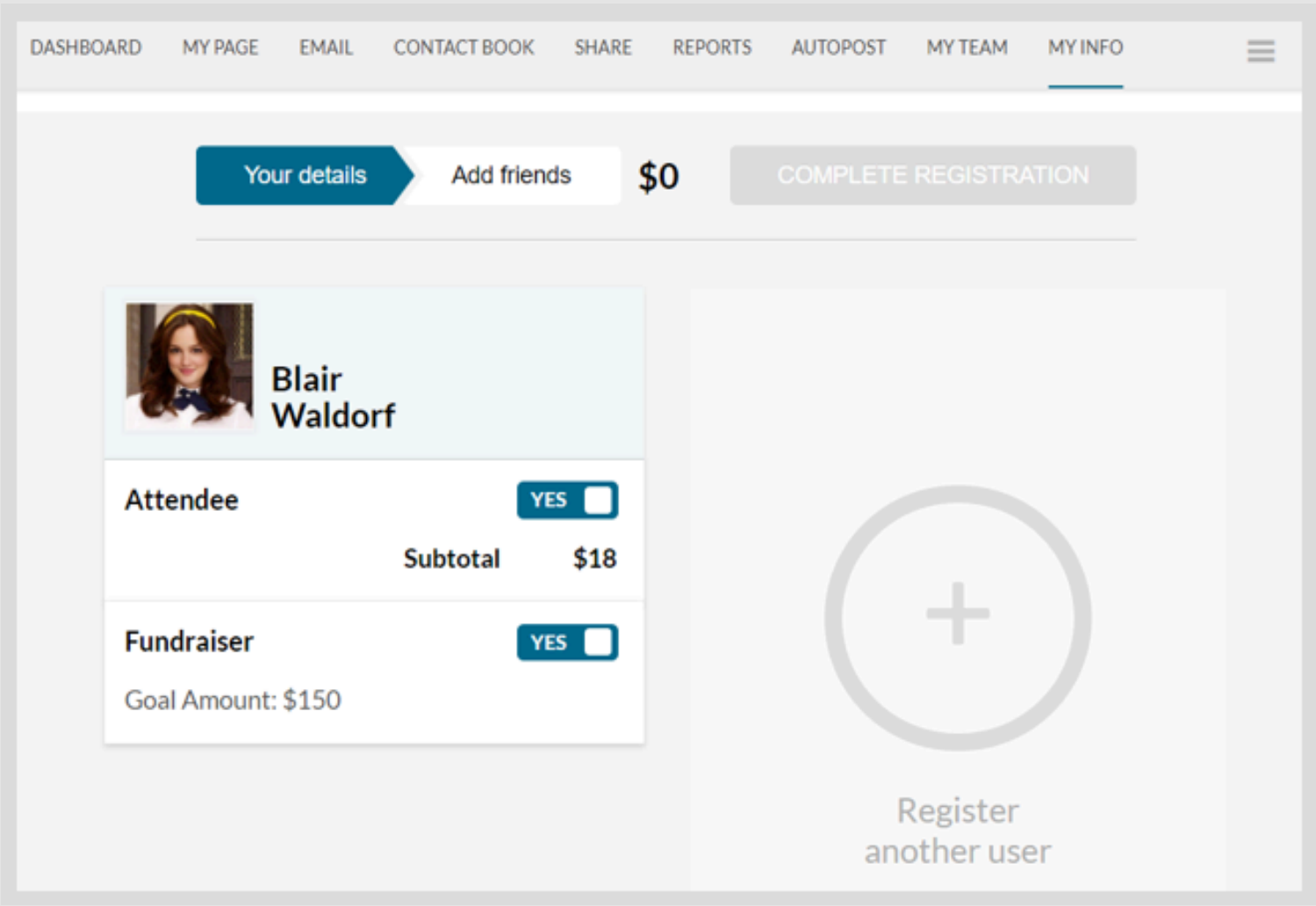
The team captain will also have the ability to turn team members into “co-captains”.

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.



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.