ONLINE STEP-BY-STEP GUIDE
for your fundraising page

GENERAL

HOW TO REGISTER

1 **Navigate** to raiseup.choc.org in your web browser.

2 Click the blue "**Start A Fundraiser**" button and choose a type of fundraiser.
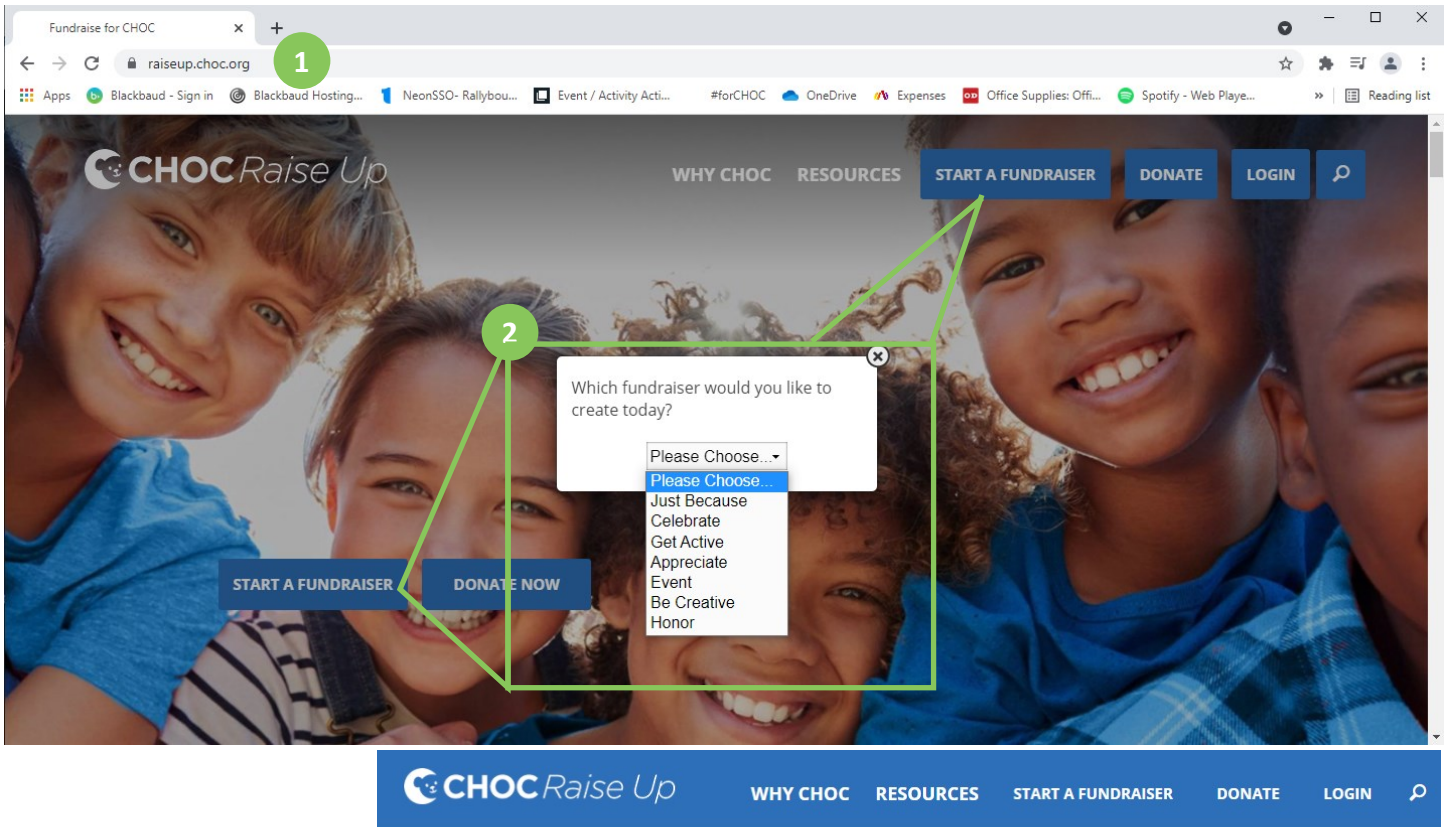
3 Next, name your **Fundraiser** *(ex: Choco Bear's 55th Birthday!)*

4 Enter your **name, email** and a **password** for your account.*

Note: This is the email and password you will use each time you login to the system.

5 **Choose** which area of the hospital your fundraiser will support.

6 **Review** and **agree** to the CHOC Foundation fundraising guidelines and check the box if you are under 18.

7 Verify you are not a robot and click **That was quick!** To move to the next page.

8 **Thank you for your registration!**

You will receive an email with a link to your #forCHOC page.

Click continue to go to your Dashboard or share #forCHOC with your friends and family.

[f Share on Facebook] [🐦 Share on Twitter]
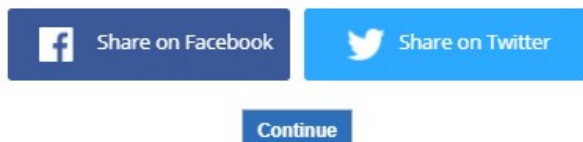
[Continue]

8 Once your registration is complete a pop-up will appear that will give you the option to **share** your registration*. To skip this step and begin personalizing your fundraising page, click the blue "Continue" button.

Note: This is not sharing your fundraising page, just that you have registered a fundraising page.

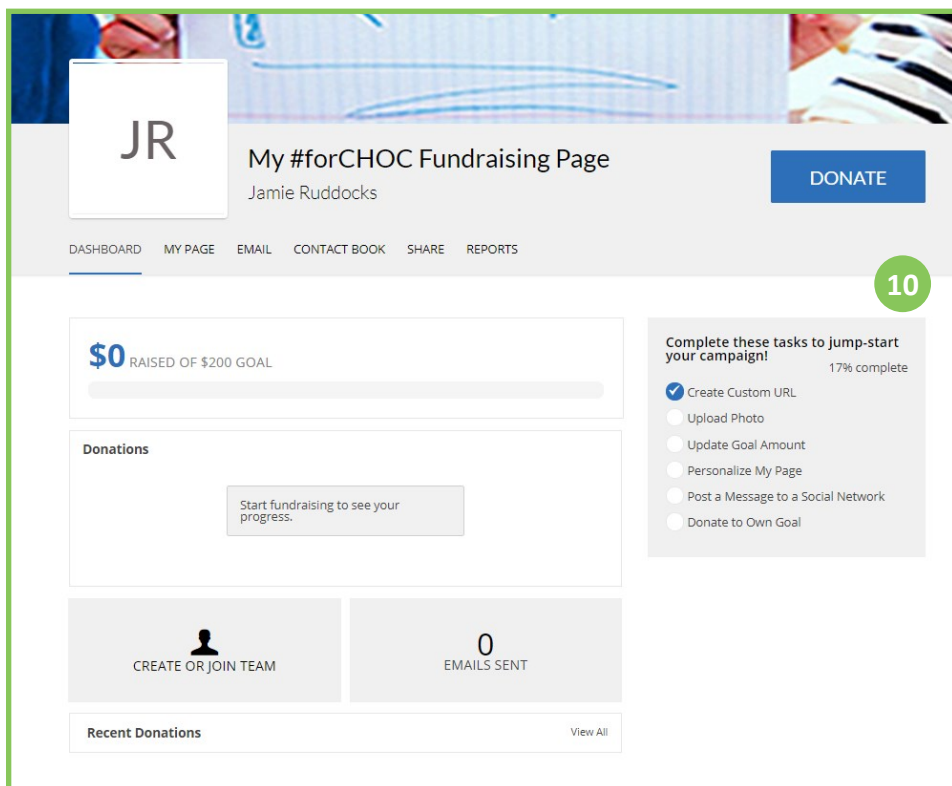**Getting Started**
Create Custom URL **9**

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.

for.choc.org/ [yournamehere]

[CREATE MY URL NOW]

9 Once you click continue, a new pop-up will appear for you to create a custom URL. This is the URL you will share with your network so they may support your cause. You can keep it simple and use your name or get creative!

JR

My #forCHOC Fundraising Page
Jamie Ruddocks

[DONATE]

DASHBOARD   MY PAGE   EMAIL   CONTACT BOOK   SHARE   REPORTS

$0 RAISED OF $200 GOAL

Donations

Start fundraising to see your progress.

👤
CREATE OR JOIN TEAM

0
EMAILS SENT

Recent Donations   View All

Complete these tasks to jump-start your campaign!
                                              17% complete
✅ Create Custom URL
⚪ Upload Photo
⚪ Update Goal Amount
⚪ Personalize My Page
⚪ Post a Message to a Social Network
⚪ Donate to Own Goal

10

10 **YOU DID IT!** You will now see your Dashboard and may begin customizing your page.

! **PRO TIP**
Use the checklist on the right-hand side of the page to jump-start your campaign!

And, **don't forget** to donate to your page to show your friends and family that you are ALL IN, too!

HOW TO LOG IN & OUT OF MY ACCOUNT

1 After you register for your first fundraising page, you will login in to the same account to make changes to your fundraiser and create new ones. Click the blue **Login** button.
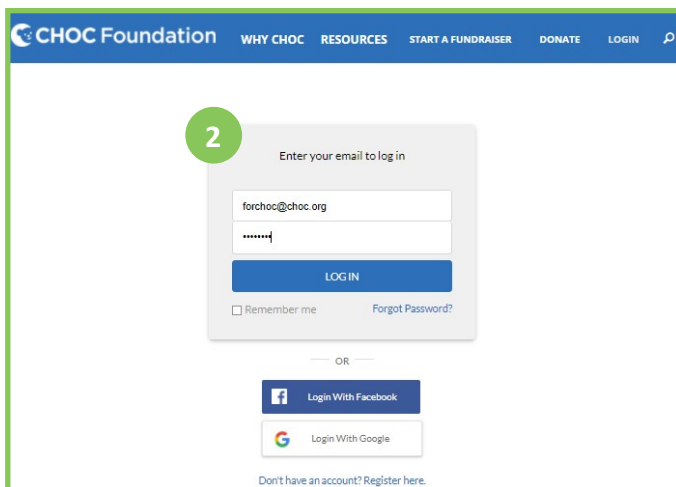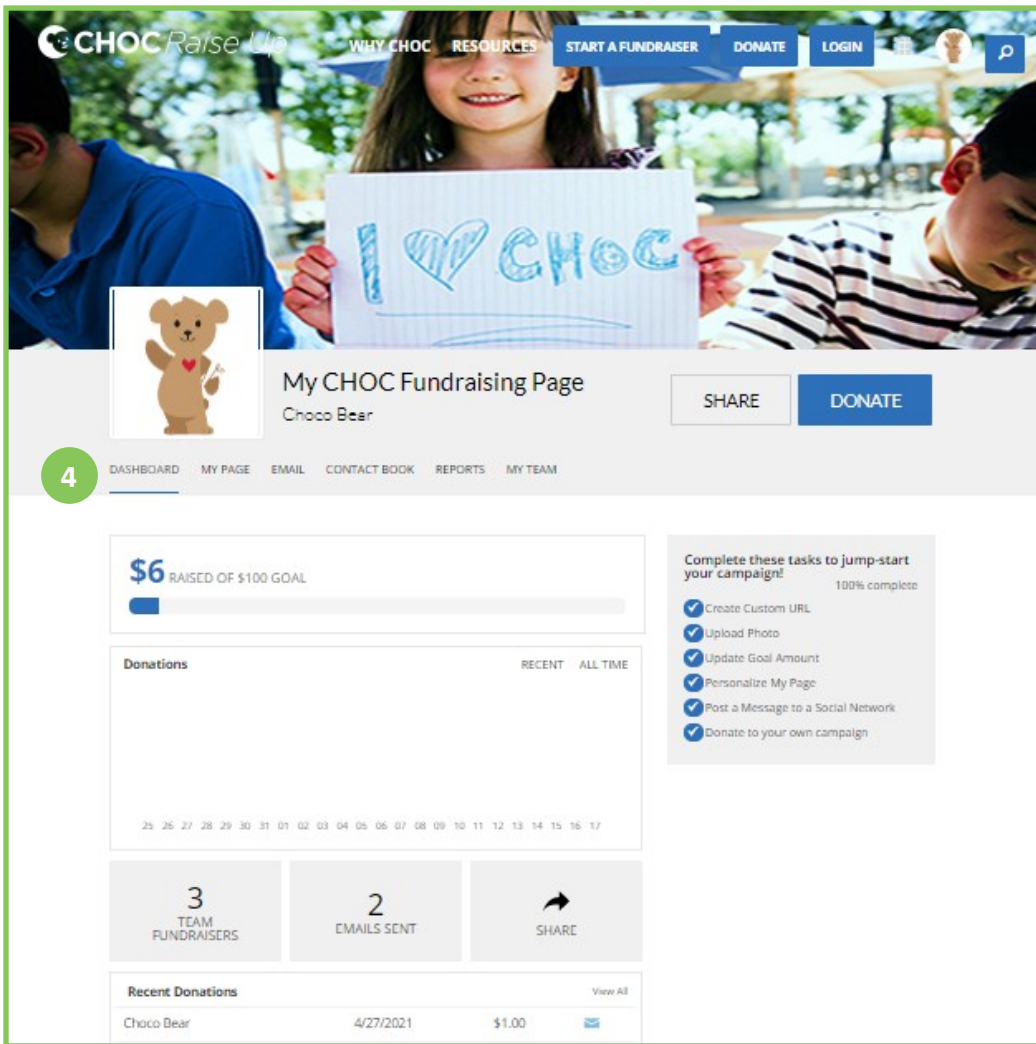

2 **Enter** your email and password. Then, click **Login.**

3 You will be directed to your fundraising **Dashboard**.

If you have multiple fundraising pages, you will be taken to your active campaign.

4 Your **Dashboard** features:

- A goal thermometer
- A summary of the number of sent emails
- The option to create or join a fundraising team
- A list of recent donations
- A handy to-do list to personalize your page and make your campaign a success!

5 To log out of your account, click the **Profile** icon on the top right. Then, click **Logout.**

Need more help? Let us know at **raiseup@choc.org**

6

HOW TO NAVIGATE MY FUNDRAISING PAGE

1   **Login** to raiseup.choc.org.*

    Note: If you have multiple fundraising pages, you will be taken to your active campaign.

2   These tabs will help you personalize your page, keep track of donations, send communication via email and social media, and manage your team (if you have a team fundraiser). See below for a description of each tab.

- **DASHBOARD** - Keep track of money raised & progress towards goal, number of sent emails, and recent donations. There is also a helpful to-do list to personalize your page and the option to create or join a team

- **MY PAGE** - Edit your page titles, campaign image, goal amount, URL, and welcome message and add updates

- **EMAIL** - Compose and send emails to your friends manually or using the contact book

- **CONTACT BOOK** - Add or import your contacts to send emails with ease

- **REPORTS** - Summary of all donations to your page and for your team

- **MY TEAM** - Keep track of your progress and the progress of your team members

- **SOCIAL** - Choose from prewritten templates for quick updates on your social media channels

---

PRO TIP

!   **Did you know you can create more fundraising pages using the same account?**
For example, you can create a new page for every birthday or each annual event you want to host. Use **the nine tile grid**, in the top right-hand corner next to your Profile Photo, is a menu that allows you to move between all your fundraising pages easily.

HOW TO PERSONALIZE MY FUNDRAISING PAGE
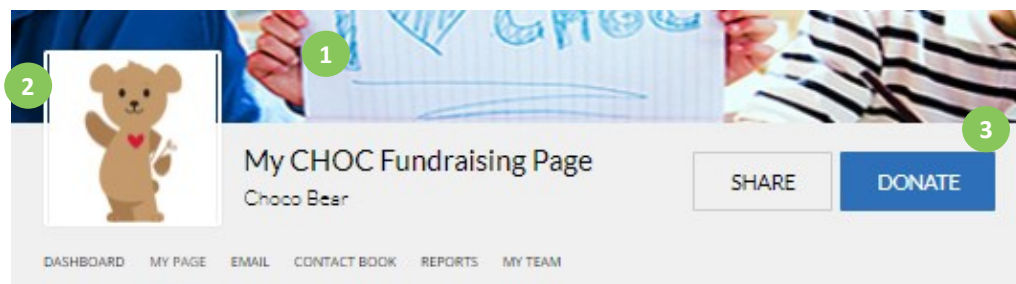
1 **Campaign Image:** To edit, hover over the image and click to change.

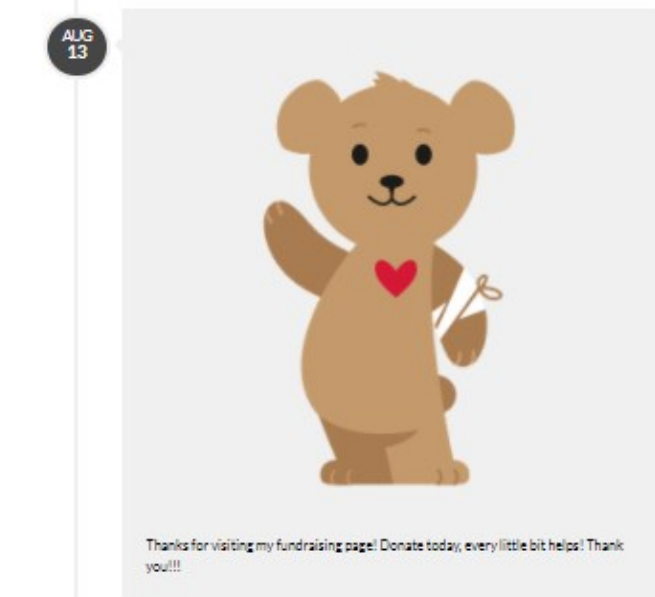**2** **Profile Image:** To edit, click your profile icon on the top right corner.

3 **Donation Button**

4 **Welcome Message Text**

5 **Edit My:** This menu lets you make this page yours!

Welcome Message: This is where you can tell your donors how your are fundraising (birthday, activity, event, etc.) and why you are choosing to support CHOC.

URL: You can edit your unique webpage link. Use your name or get creative. We **DO NOT** recommend changing your URL after you have shared it with your network.

Goal: Need to move your fundraising goal up or down? Just click here!

Facebook ID: You can connect your Facebook user ID* to moderate your friends' comments on your fundraising page.

*Facebook User ID can be found in Facebook Settings & Privacy > Settings > Apps & Websites > Click View and edit next to any app > scroll and copy User ID)
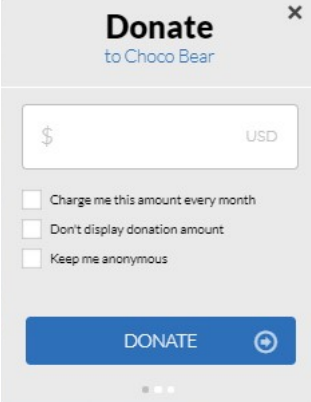
6 **Add Updates:** Keep your donors and visitors to your page engaged and in the loop by adding videos, photos, or text updates. Donors can comment on your updates below each post.

We are here to help you! Reach us at **raiseup@choc.org**

8

HOW TO DONATE TO MY PAGE

1 **Login** to raiseup.choc.org

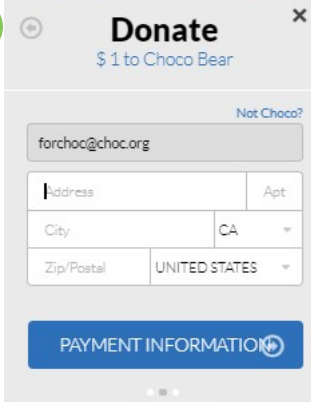**2** Click blue **Donate** button to the right of the Page Title.

3 A light box will appear to make your donation.
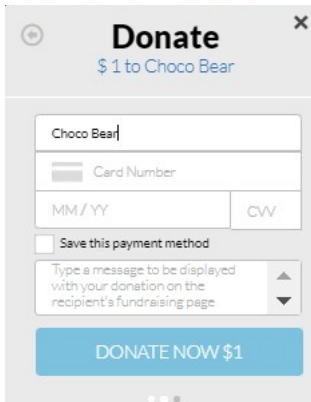
Enter desired donation amount.

You may select to donate monthly, keep yourself anonymous and/or hide your donation amount.

4 **Enter** your personal information.

5 **Enter** your payment details.

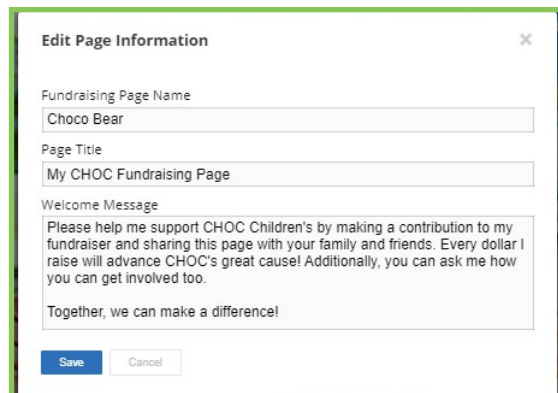*You can also include a donation message to be shared on your page.*

6 YOU'RE ALL SET!

Use the Facebook and Twitter icons to share your donation on social media.

HOW TO CHANGE MY PAGE TITLE & WELCOME MESSAGE

1 **Login** to raiseup.choc.org

2 Click on the **My Page** tab.

3 Under **Edit My**, click **Welcome Message** icon.

4 A light box with appear that says "Edit Page Information." Here, you can change the following fields:
　　　　Fundraising Page Name
　　　　**Page Title**
　　　　Welcome Message

5 Click **Save**.

PRO TIP
Your **Welcome Message** is the perfect place to share why you have chosen to support CHOC. Maybe you're a grateful family, know a CHOC patient, or just want to help kids; whatever your connection, let your story shine!

Need more help? Reach out to us at **raiseup@choc.org**

10

HOW TO EDIT MY FUNDRAISING PAGE URL

1 **Login** to raiseup.choc.org

2 Click on the **My Page** tab.

3 Under **Edit My**, click **URL** icon.
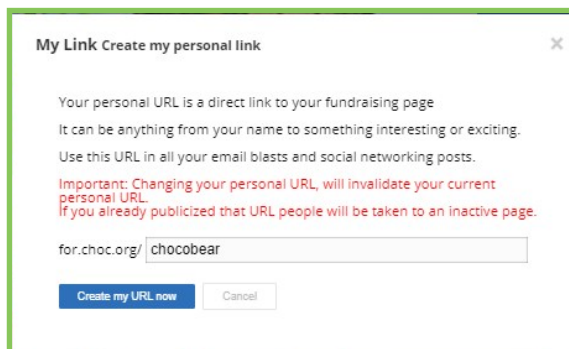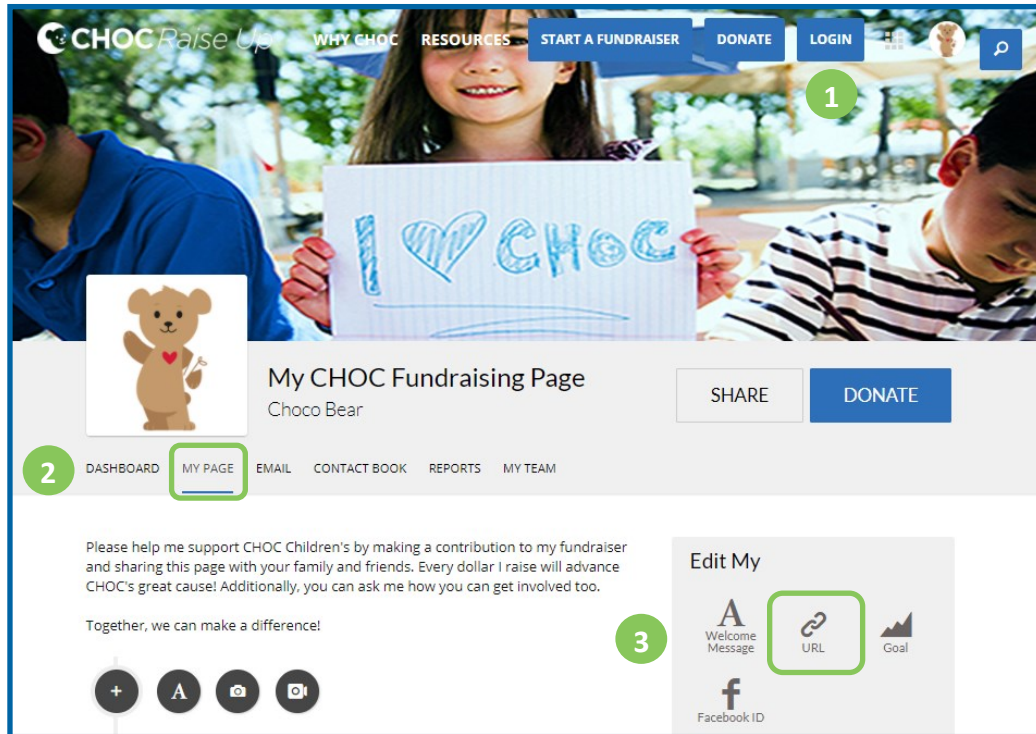
4 A light box with appear that says "Update URL." **Enter** the desired URL. It can be as simple as your name or you can get creative!
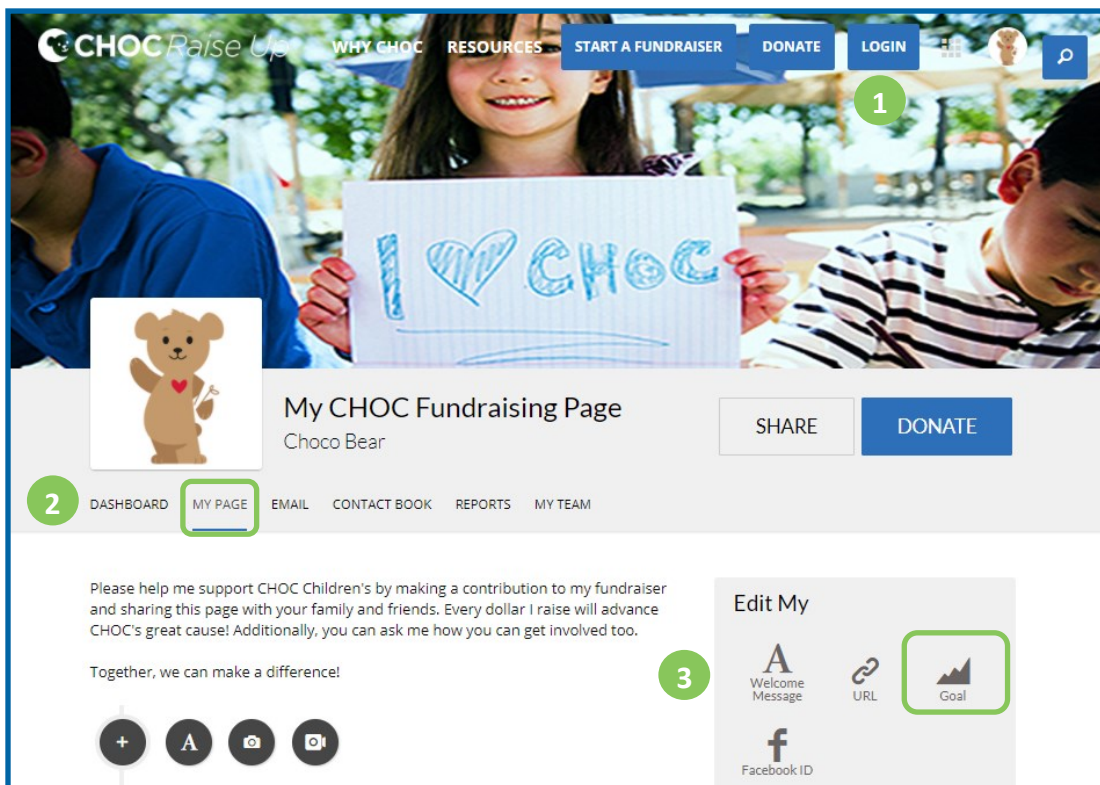
5 Click **Save**.

IMPORTANT
We **DO NOT** recommend changing your URL once it has been shared with your network. If you do decide to change it after initial set up, make sure to update your network and materials with the correct webpage.

Need more help? Reach out to us at **raiseup@choc.org**

11

HOW TO EDIT MY GOAL AMOUNT

1 **Login** to raiseup.choc.org

2 Click on the **My Page** tab.

3 Under **Edit My**, click **Goal** icon.

4 A light box with appear that says "Update Goal Amount." **Enter** the desired goal amount.

5 Click **Save**.

PRO TIP

If you exceed your original goal, raise your goal amount and share it with your network. Thank them for their support and encourage them to double their impact by helping you reach your new goal! For message templates, check out the Social tab on your Fundraising Page.
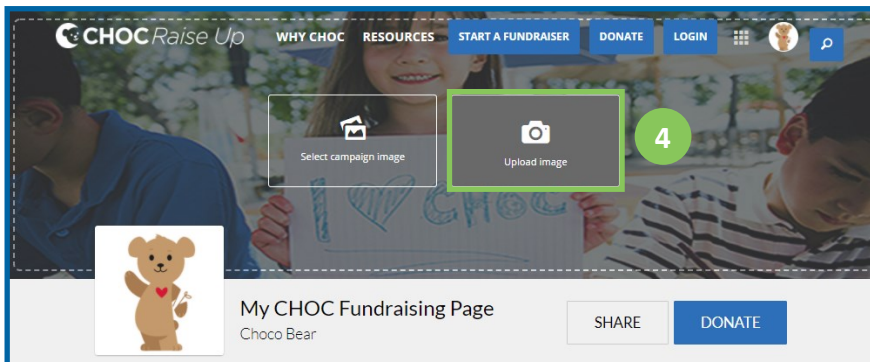
HOW TO ADD A CAMPAIGN IMAGE

1 **Login** to raiseup.choc.org

2 Click on the **My Page** tab.

3 **Hover** your mouse over the Campaign Image in the header until you see the edit menu appear.
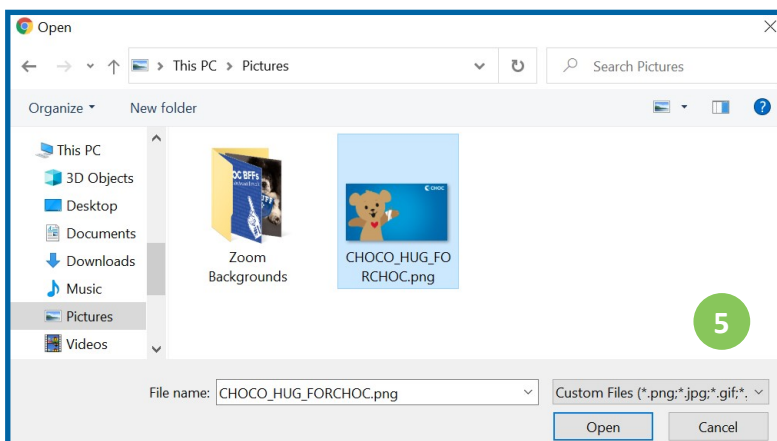

4 Click **Upload Image.***

Note: This image should be 2500x785 pixels and not exceed 25mb.

5 Locate the file of the image on your computer that you want to use and select it. Then, click **Open.**

6 Your new Campaign Image will appear. Using the **slide bar** on the right, you can zoom in and out to bring the image right where you want it.

7 Once you are content with the image, click on the **check mark** to save the new photo.

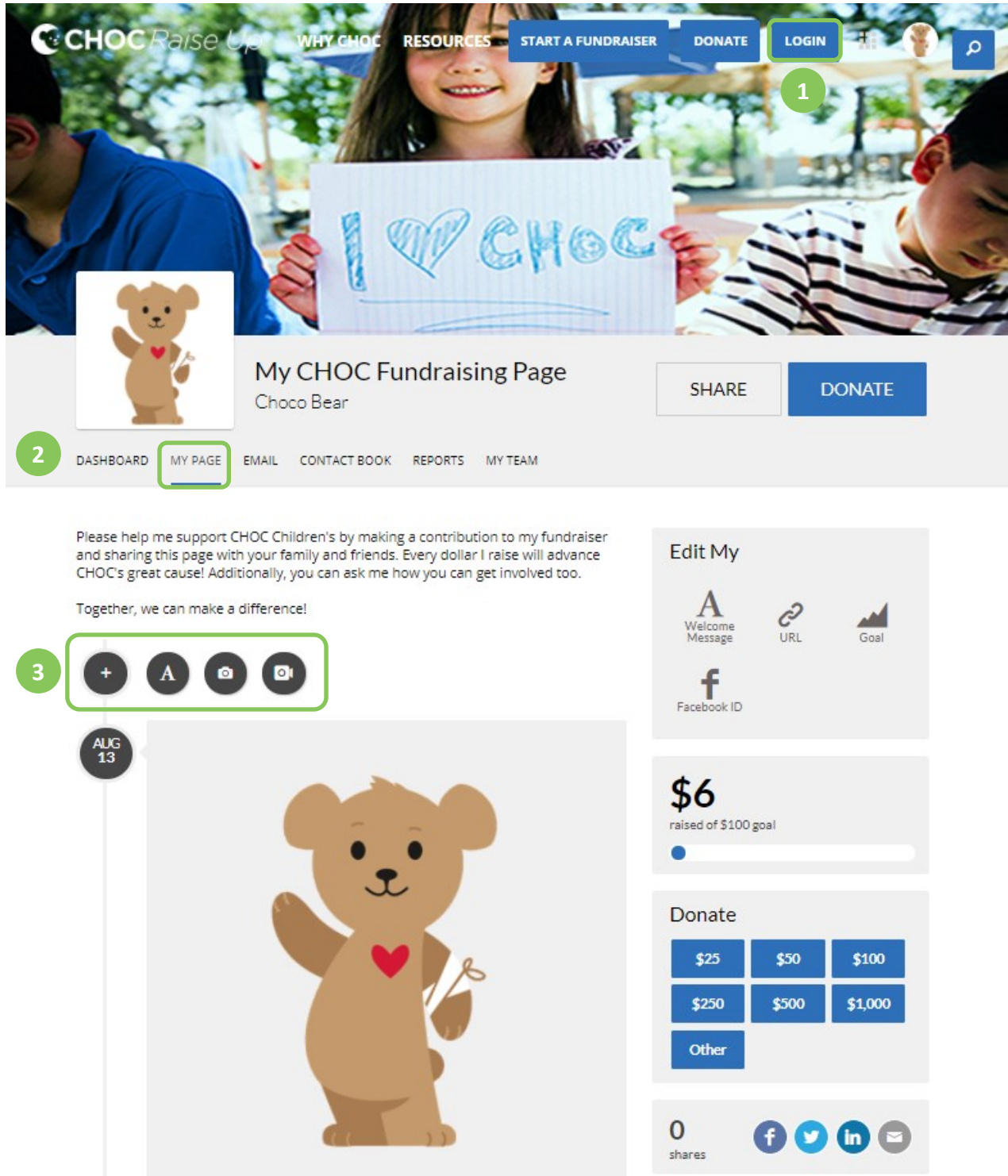*If you would like to cancel the change, click the "x" mark.*

PRO TIP
Use free photo editing apps like PicCollage or websites like Canva to put together multiple photos to make your page stand out!
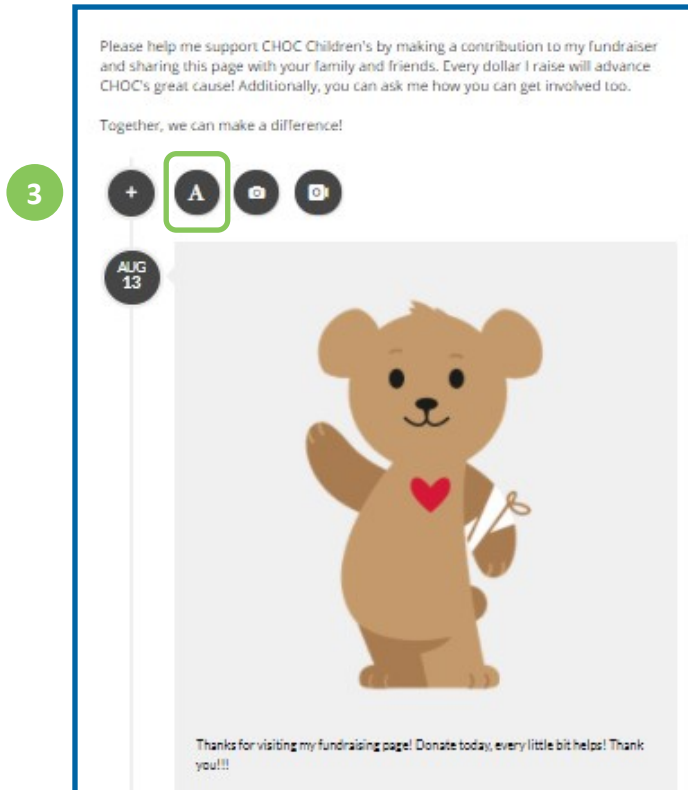
Still have questions? We can help! Email **raiseup@choc.org**

14

HOW TO ADD UPDATES TO MY PAGE

1. **Login** to raiseup.choc.org and click on the **My Page** tab.

2. Click on the **My Page** tab.
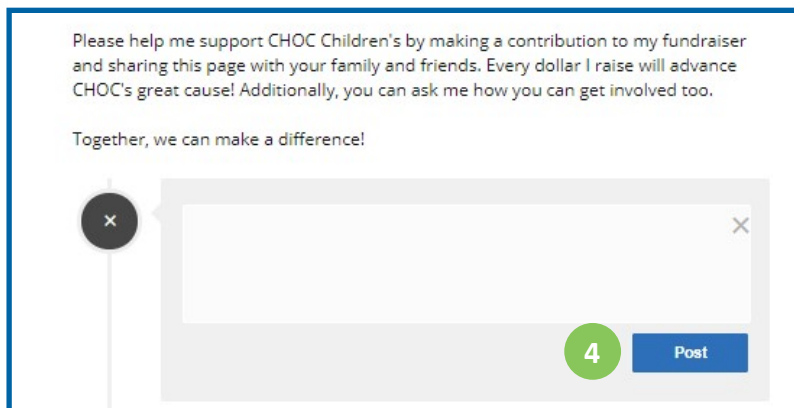
3. Select a **Text, Photo,** or **Video** update.

FOR TEXT UPDATES:

3

Please help me support CHOC Children's by making a contribution to my fundraiser and sharing this page with your family and friends. Every dollar I raise will advance CHOC's great cause! Additionally, you can ask me how you can get involved too.

Together, we can make a difference!

AUG 13

Thanks for visiting my fundraising page! Donate today, every little bit helps! Thank you!!!

3 For a **Text** update, select the A icon.

Please help me support CHOC Children's by making a contribution to my fundraiser and sharing this page with your family and friends. Every dollar I raise will advance CHOC's great cause! Additionally, you can ask me how you can get involved too.

Together, we can make a difference!

4 Post

4 A text box will appear for your update. To save, click **Post**.

To cancel, **click the X** in the top left.

APR 27 — I've almost made it to my goal! Thank you for supporting my fundraiser this far. Together we can change lives!
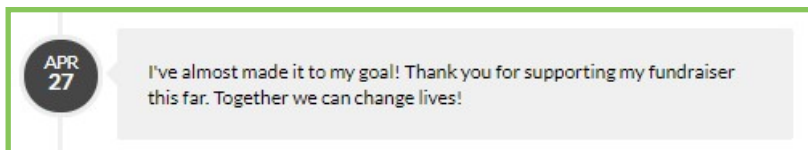
SUCCESS!

- -

FOR PHOTO UPDATES:

5

Please help me support CHOC Children's by making a contribution to my fundraiser and sharing this page with your family and friends. Every dollar I raise will advance CHOC's great cause! Additionally, you can ask me how you can get involved too.
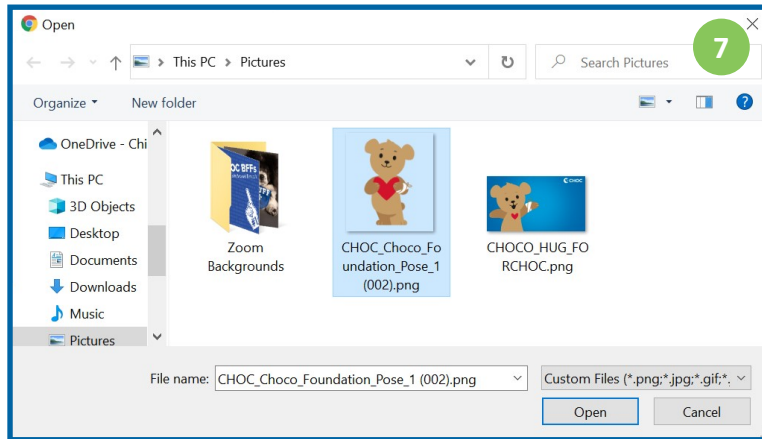
Together, we can make a difference!
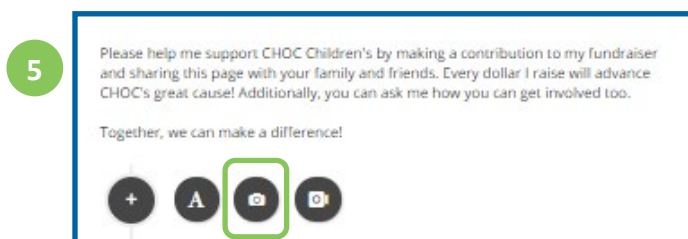
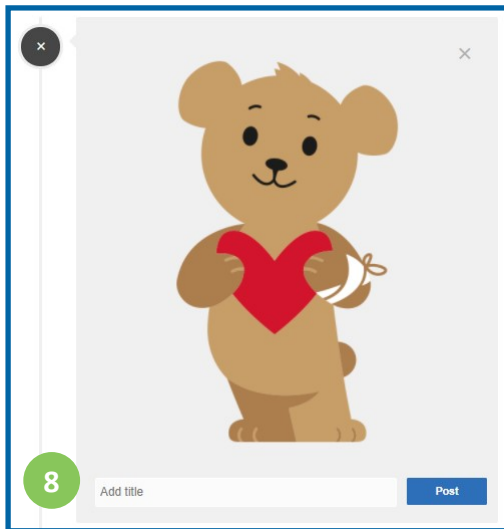**5** For a **Photo** update, select the camera icon.*

*Note: This image should be 458x259 pixels and not exceed 25mb.

6 A box will appear for your photo update. Hover over the camera icon and **click** on it when it turns darker gray.
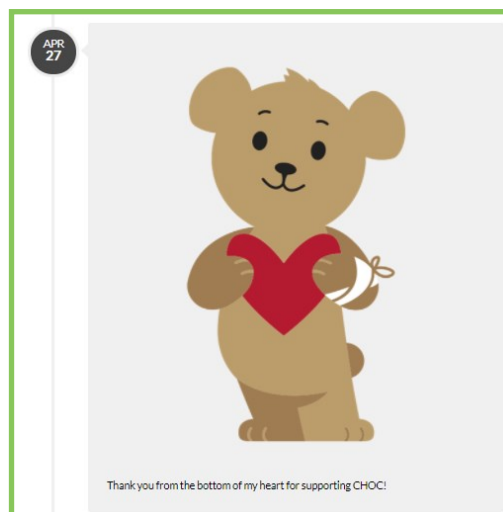

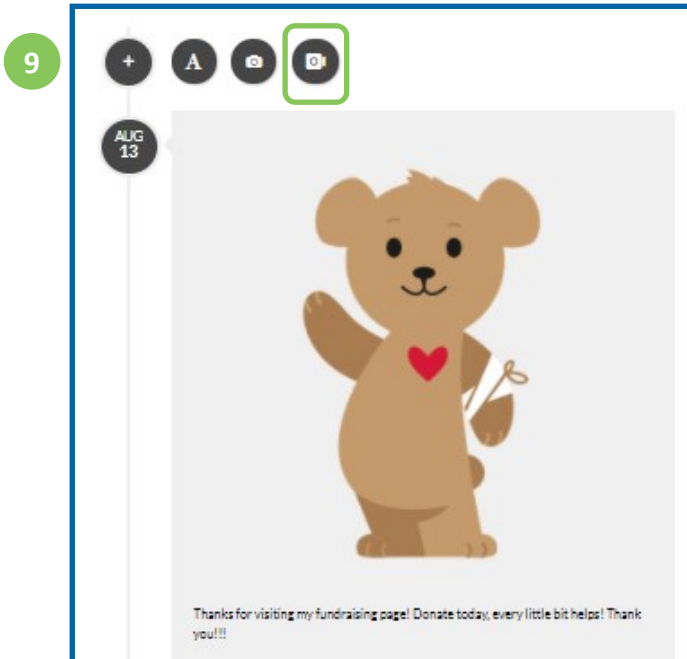**7** Locate the file of the image you want to use and click on it. Then, click **Open**.

8 Add a title to caption your update. Then, click **Post** to save.

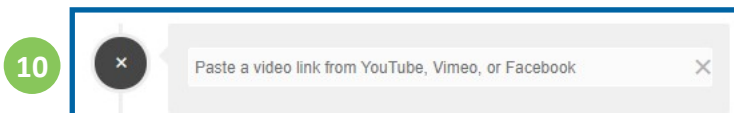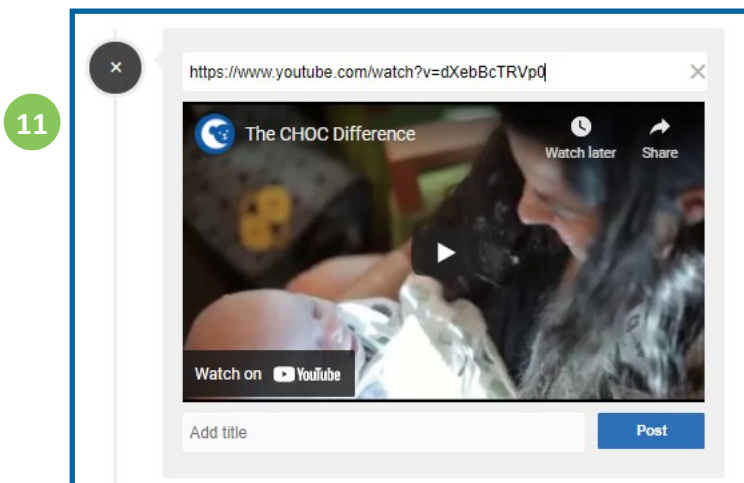To cancel, **click the X** in the top left.

YOU DID IT!

FOR VIDEO UPDATES:

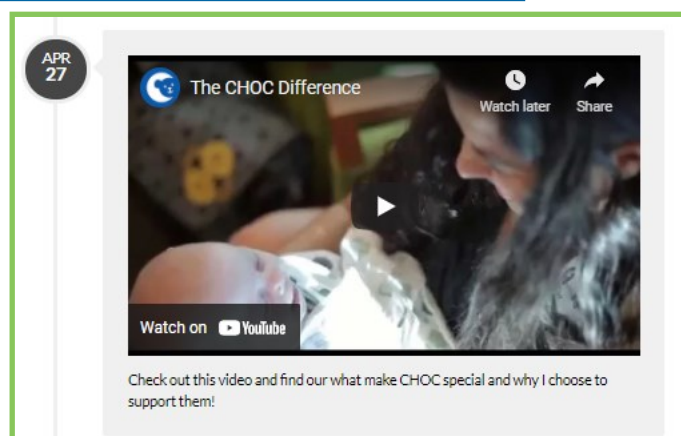**9** For a **Video** update, select the video camera icon.

10 A text box for your video update. **Copy & Paste** a video link from YouTube, Vimeo, or Facebook into the box.

Paste a video link from YouTube, Vimeo, or Facebook

11 Add a title to caption your update. Then, click **Post** to save.

To cancel, **click the X** in the top left.

https://www.youtube.com/watch?v=dXebBcTRVp0

The CHOC Difference
Watch later   Share
Watch on YouTube

Add title   Post

APR 27

The CHOC Difference
Watch later   Share
Watch on YouTube

Check out this video and find our what make CHOC special and why I choose to support them!

ALL SET!

We are here to help! Email us at **raiseup@choc.org**

18

PROFILE

HOW TO CHANGE MY ACCOUNT EMAIL ADDRESS

1   **Login** to raiseup.choc.org

2   **Click** on the circular image on the top right od the page. Then, **Click Profile.**
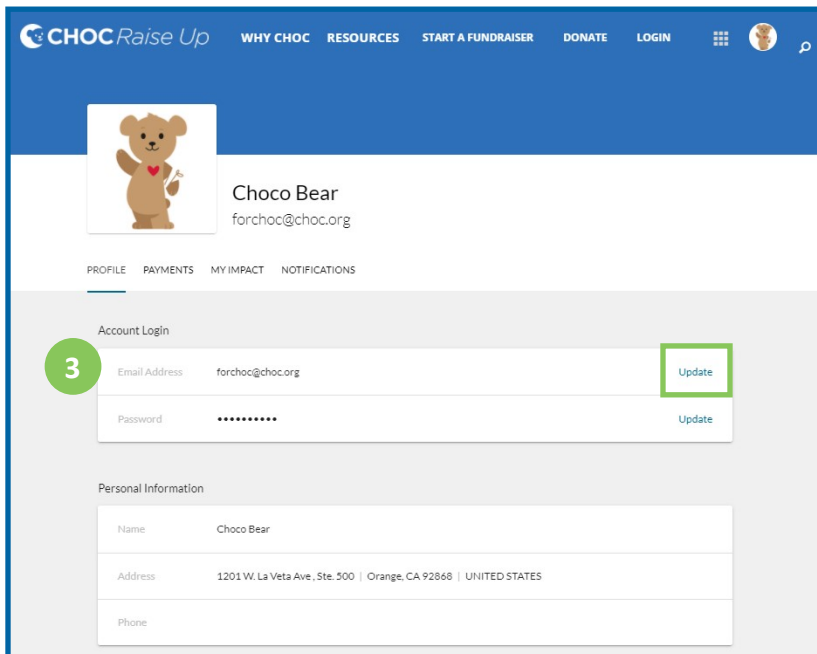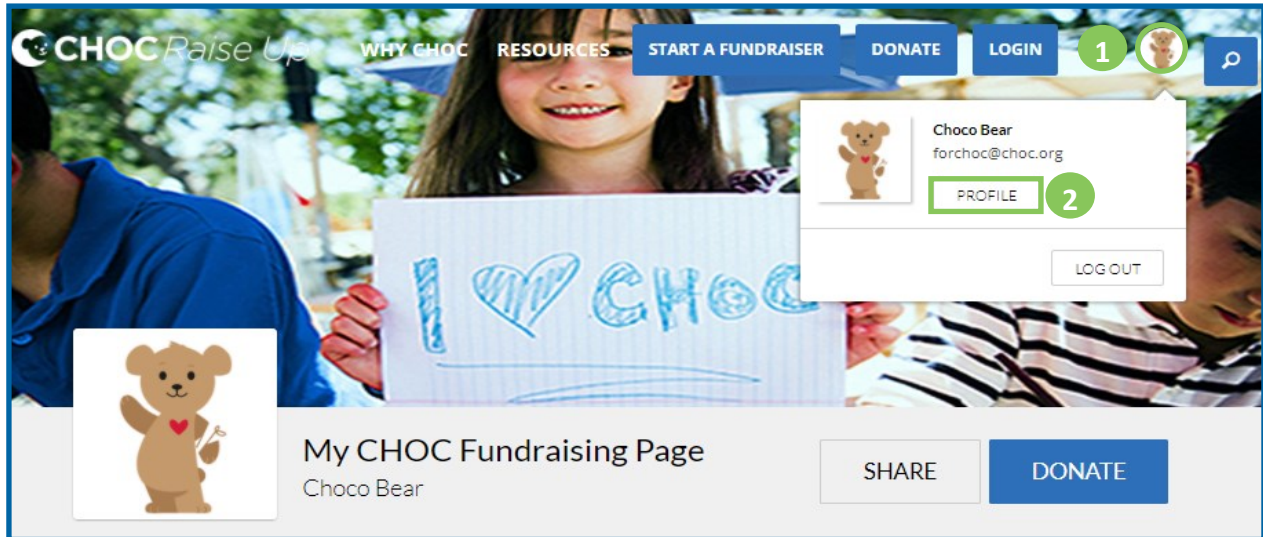
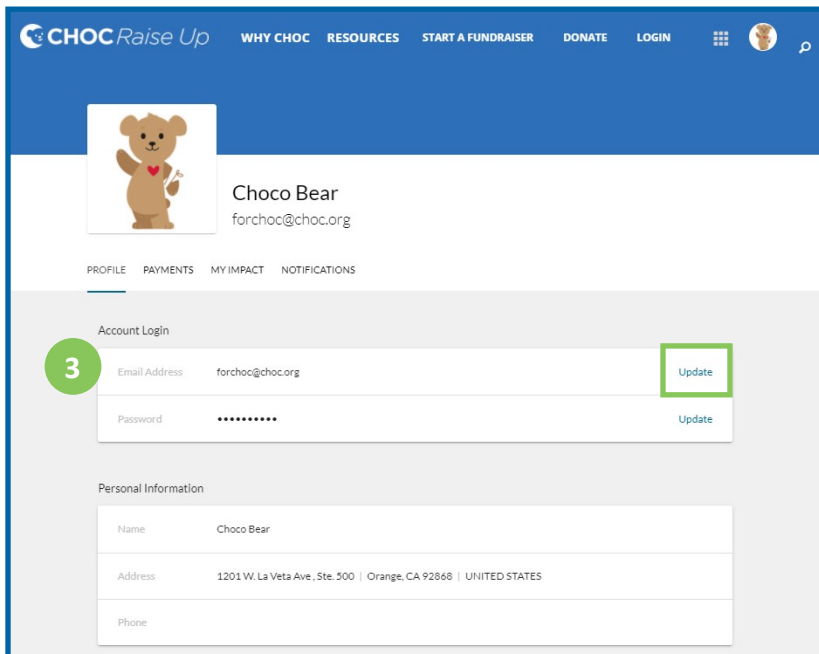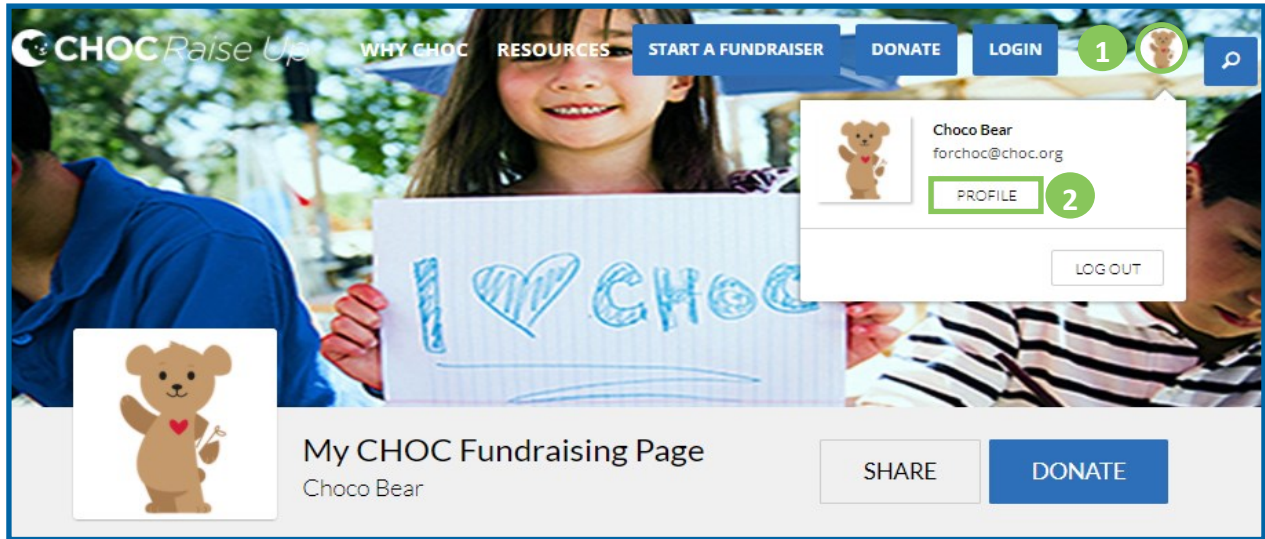**3**   On the **Profile** tab, locate your current email address and click **Update**
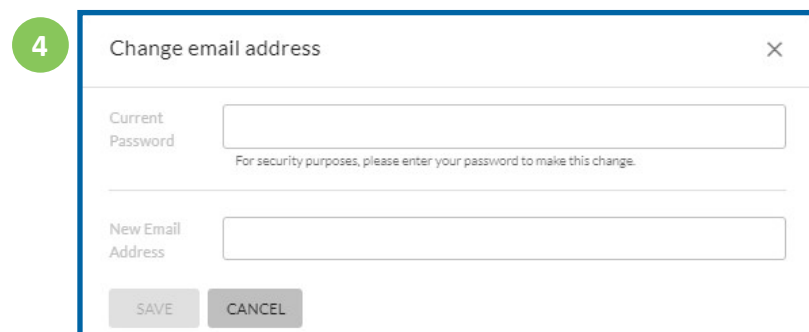
4   The *Change email address* pop-up will appear.

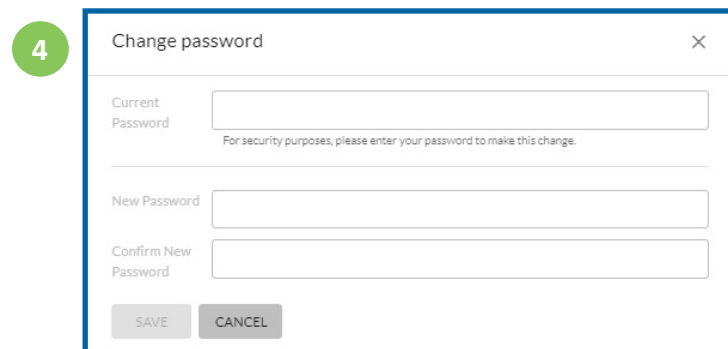Enter your current password and the new email address* you would like to use. Then, click **Save**.

Note: You may not use an email address associated with other CHOC Raise Up accounts.

HOW TO CHANGE MY ACCOUNT PASSWORD

1　**Login** to raiseup.choc.org

2　**Click** on the circular image on the top right od the page. Then, **Click Profile**

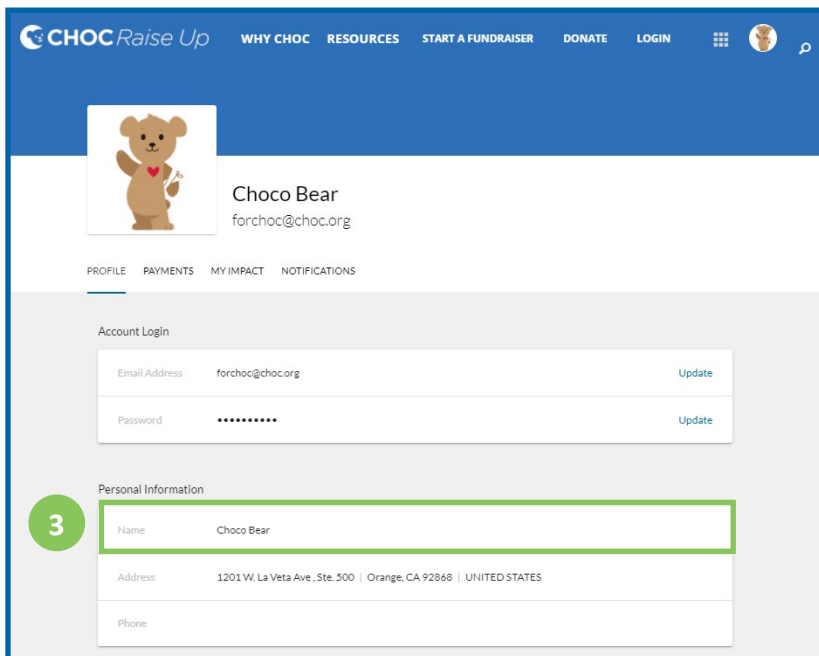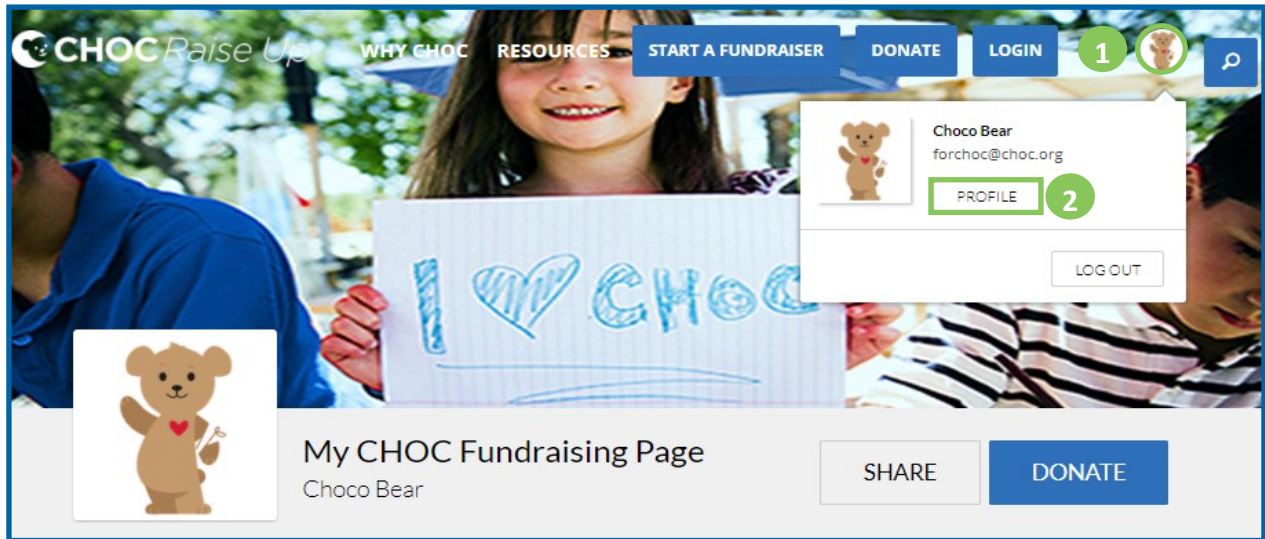**3**　On the **Profile** tab, locate your current email address and click **Update**

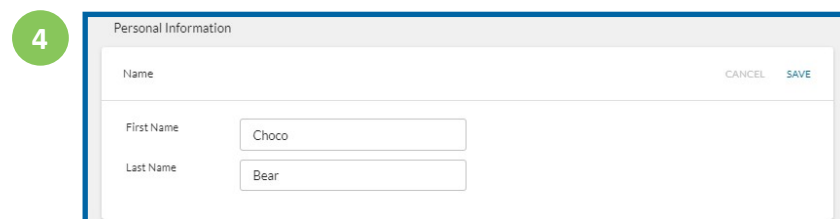**4**　The *Change password* pop-up will appear.

Enter your current password in the space provide. Enter the new password and click **Save**.

HOW TO CHANGE THE NAME ON MY ACCOUNT

1   **Login** to raiseup.choc.org

2   **Click** on the circular image on the top right od the page. Then, **Click Profile**
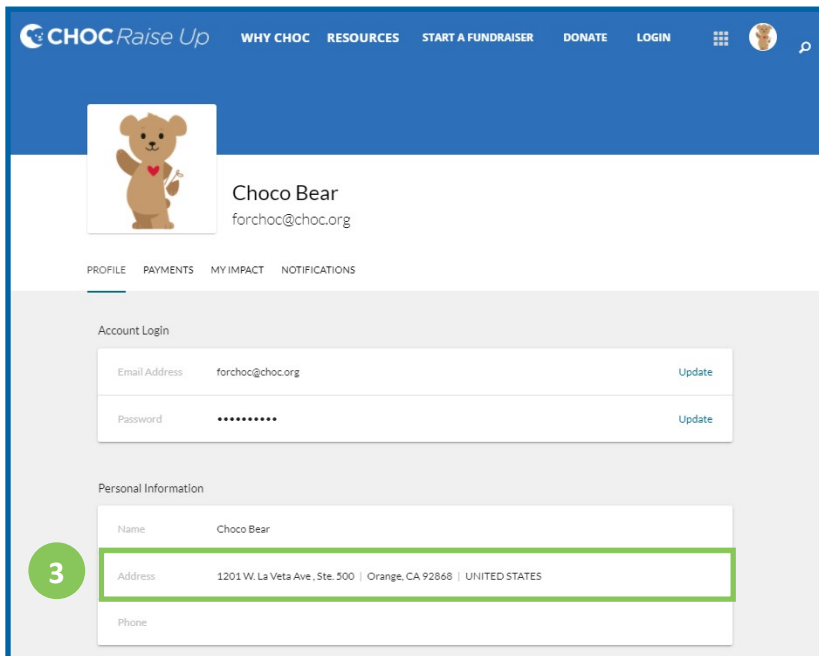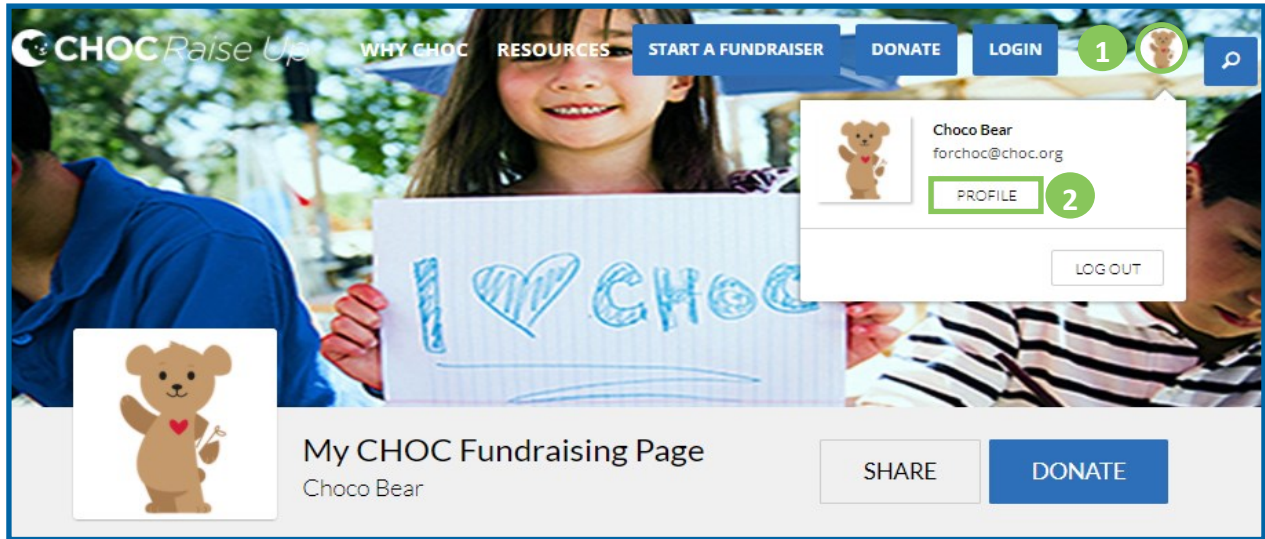

3   On the **Profile** tab, click on your name.

4   Enter the updated name and click **Save**.

HOW TO CHANGE MY ACCOUNT ADDRESS

1 **Login** to raiseup.choc.org

2 **Click** on the circular image on the top right od the page. Then, **Click Profile**

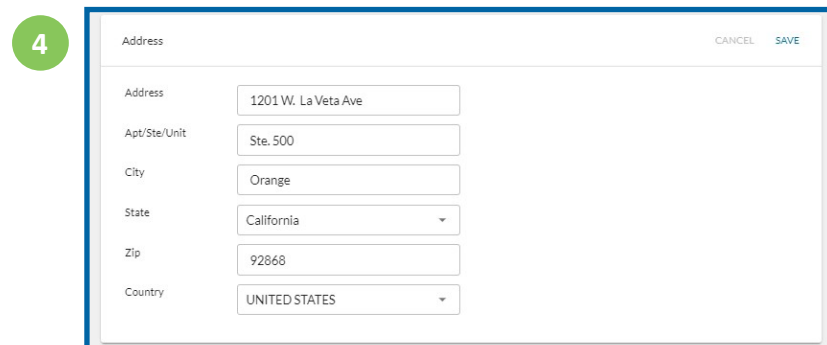**3** On the **Profile** tab, click on your address.

4 Enter the new address and click **Save**.

HOW TO CHANGE MY ACCOUNT PHONE NUMBER

1 **Login** to raiseup.choc.org

2 **Click** on the circular image on the top right od the page. Then, **Click Profile**
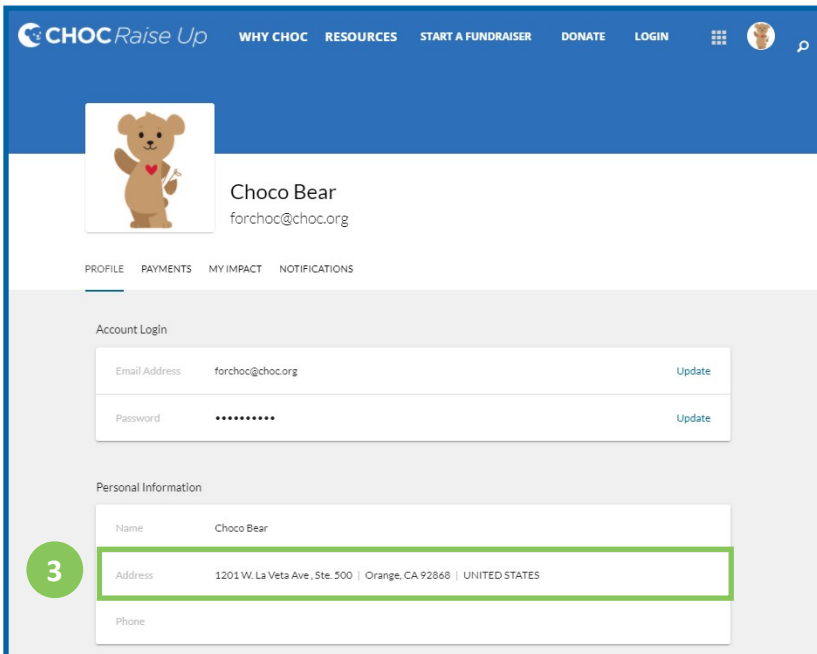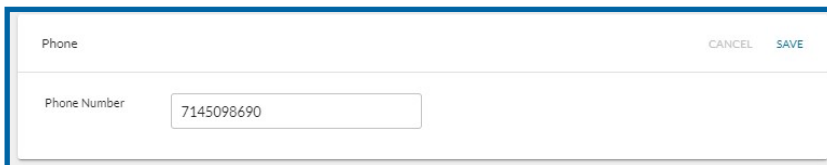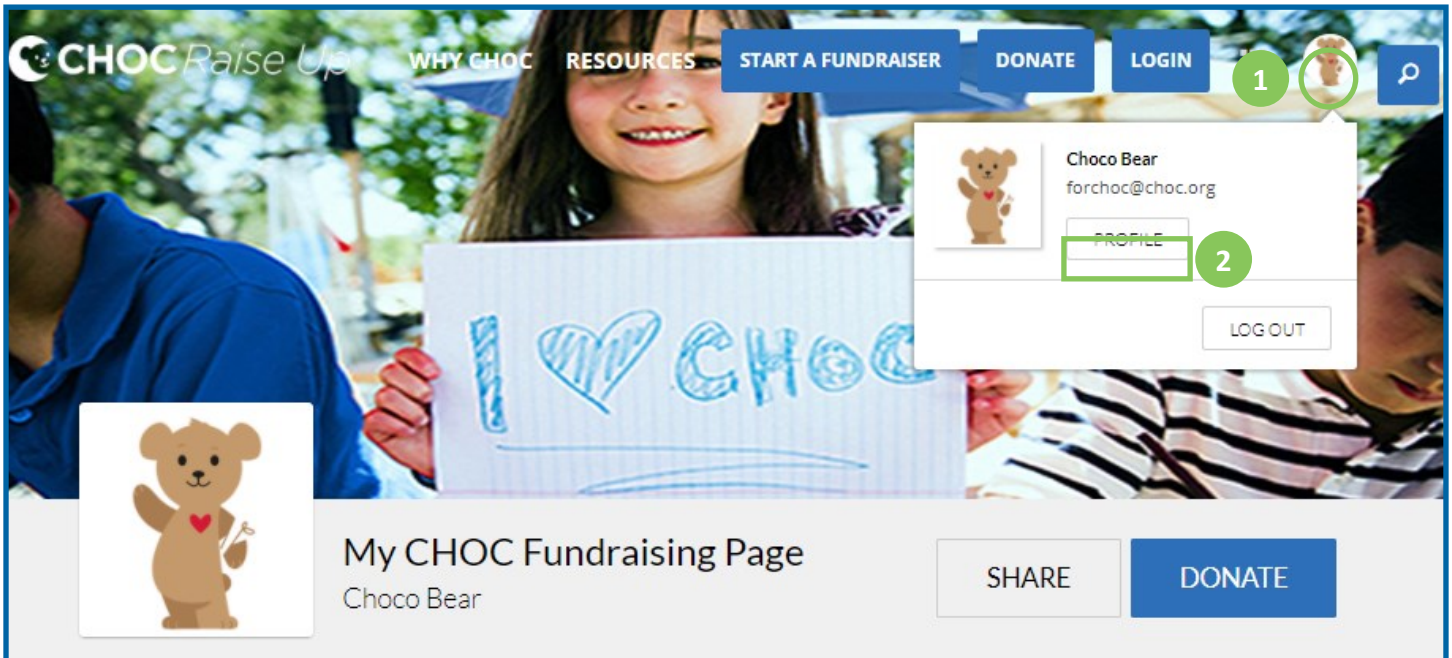

3 On the **Profile** tab, click on your address.
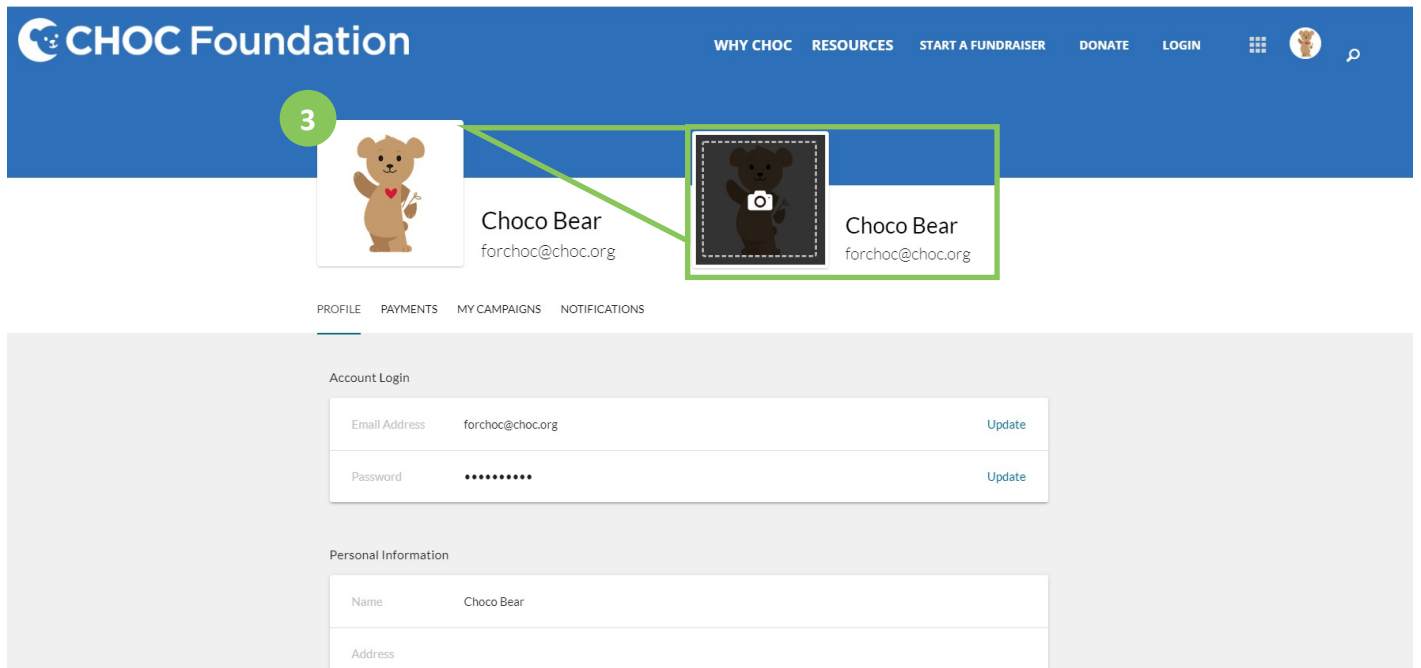

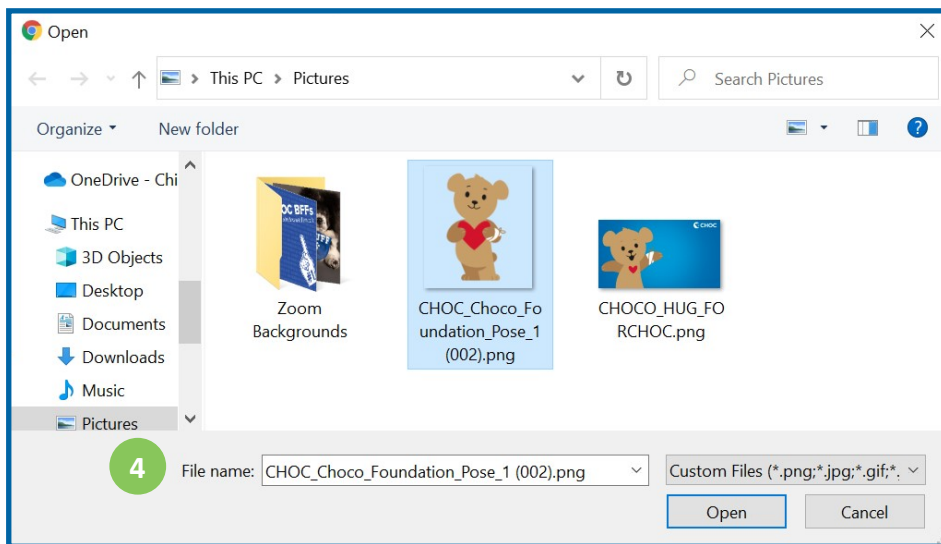**4** Enter the new phone number and click **Save**.

HOW TO EDIT MY PROFILE IMAGE

1   **Login** to raiseup.choc.org

2   **Click** on the circular image on the top right od the page. Then, **Click Profile**
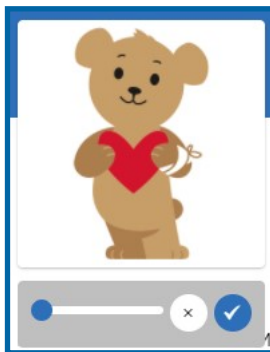

3   **Hover over** the Profile Image. When the image is greyed out, **click the Camera icon.**

4 Locate the file of the image* you want to use and click on it. Then, click **Open**.

Note: This image should be 170x170 pixels and not exceed 25mb.

**5** Your new Profile Image will appear. Using the **slide bar** on the right, you can zoom in and out to bring the image right where you want it.

6 Once you are content with the image, click on the **check mark** to save the new photo.

If you would like to cancel the change, click the "x" mark.

Still have questions? We can help! Email **raiseup@choc.org**

26

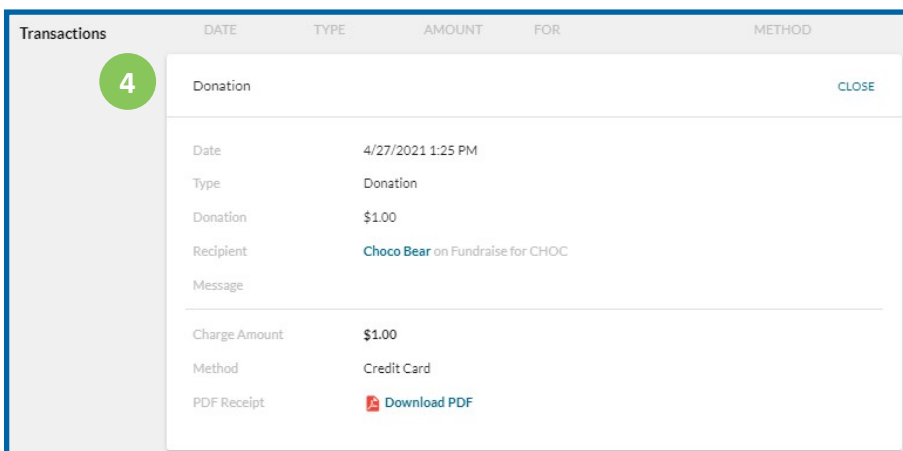# HOW TO REVIEW YOUR PERSONAL DONATIONS

1 **Login** to raiseup.choc.org

2 **Click** on the circular image on the top right od the page.
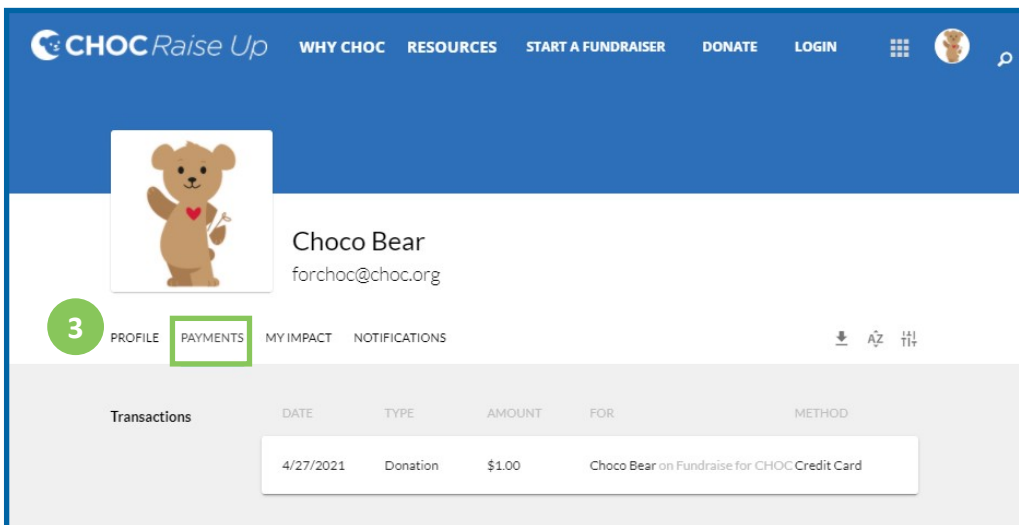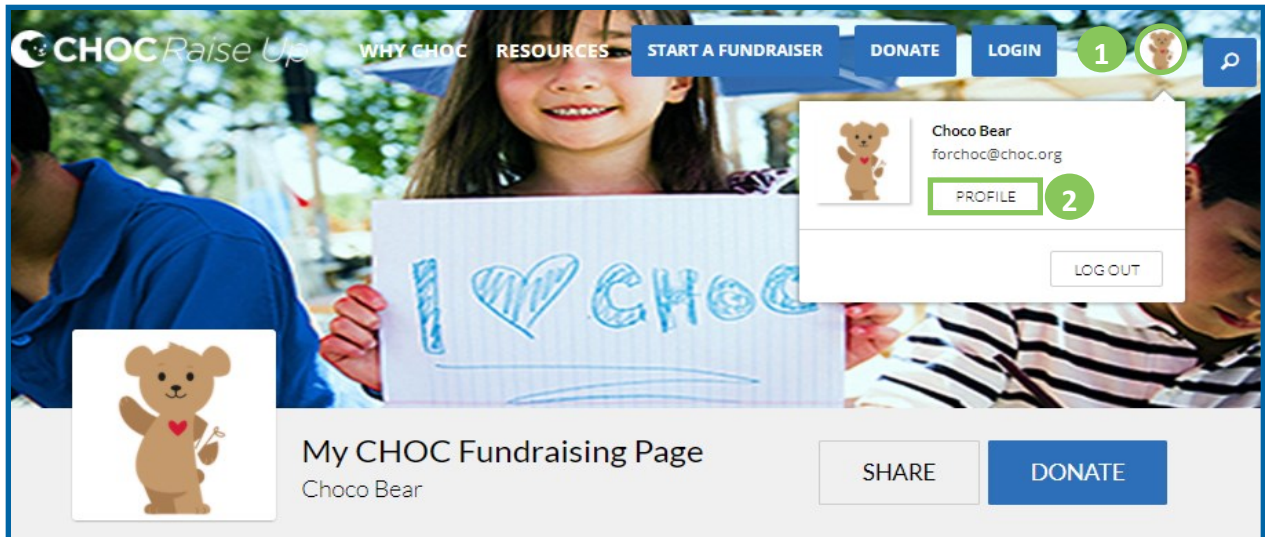
3 Select **Payments** tab.
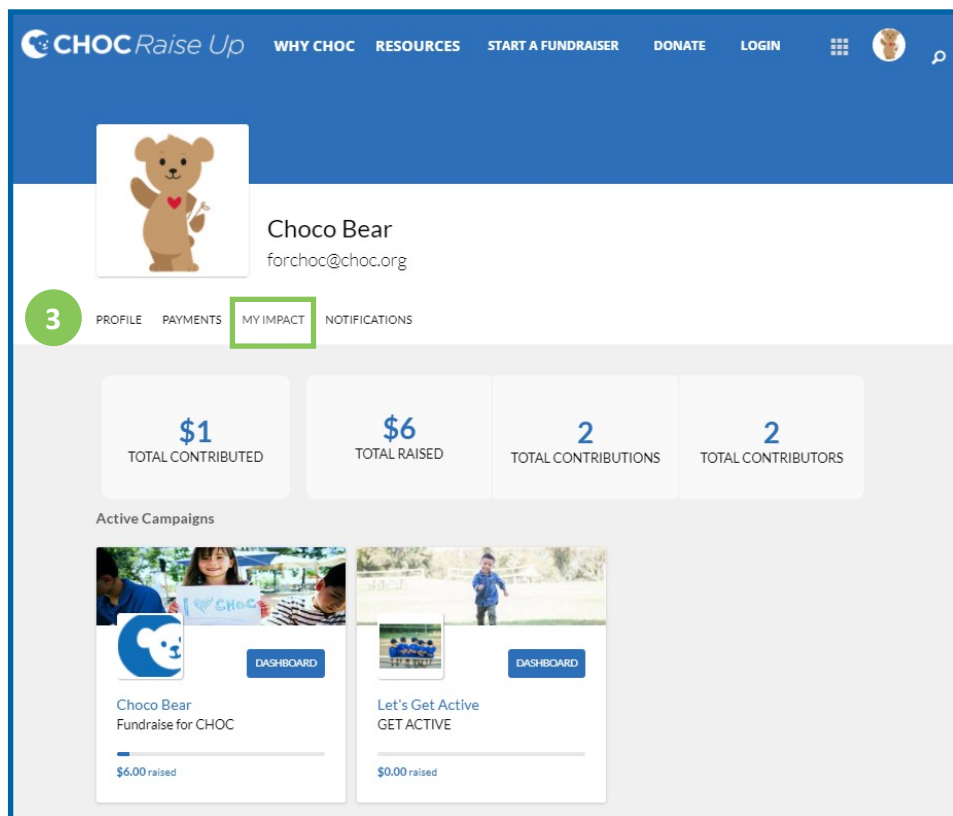
This is a summary of all donations made by this account.

4 Click on the donation to open additional details.

> **PRO TIP**
> The donation record also features a **PDF** copy of the tax receipt.

HOW TO SEE MY IMPACT & ACTIVE CAMPAIGNS

1 **Login** to raiseup.choc.org

2 **Click** on the circular image on the top right od the page.
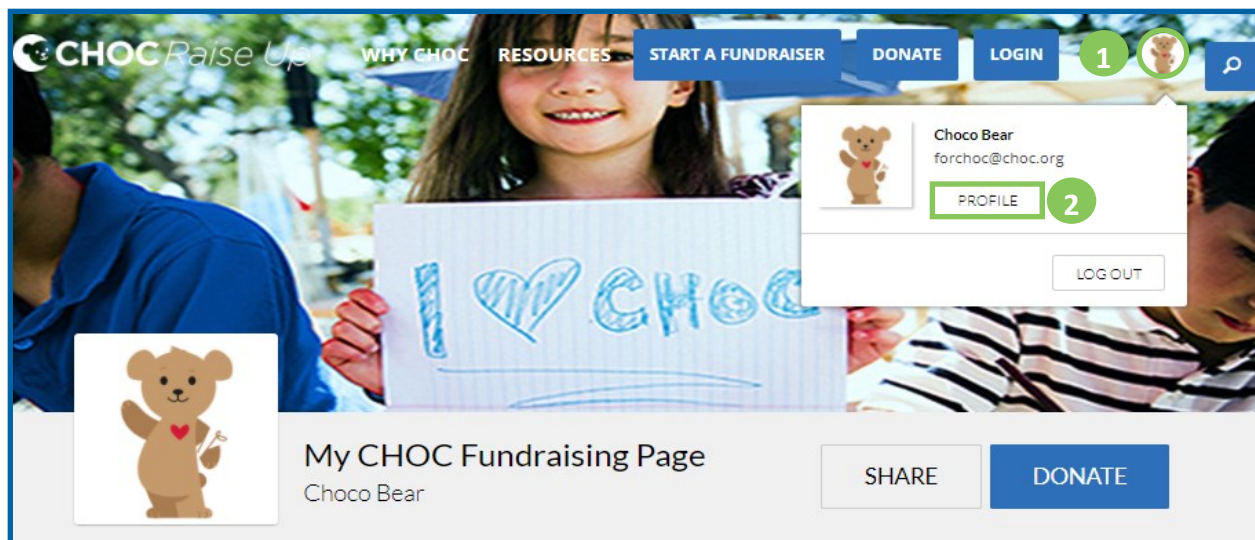
3 Select **My Impact** tab.
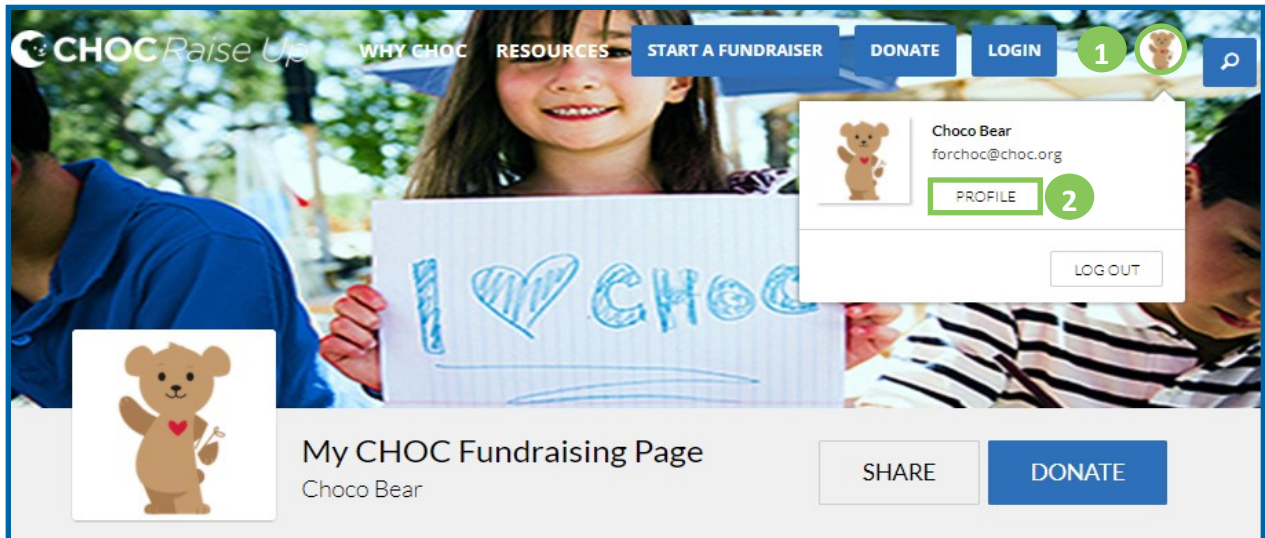
This is a summary of your contributions to fundraising campaigns, the total you fundraised, and your active fundraising campaigns.*

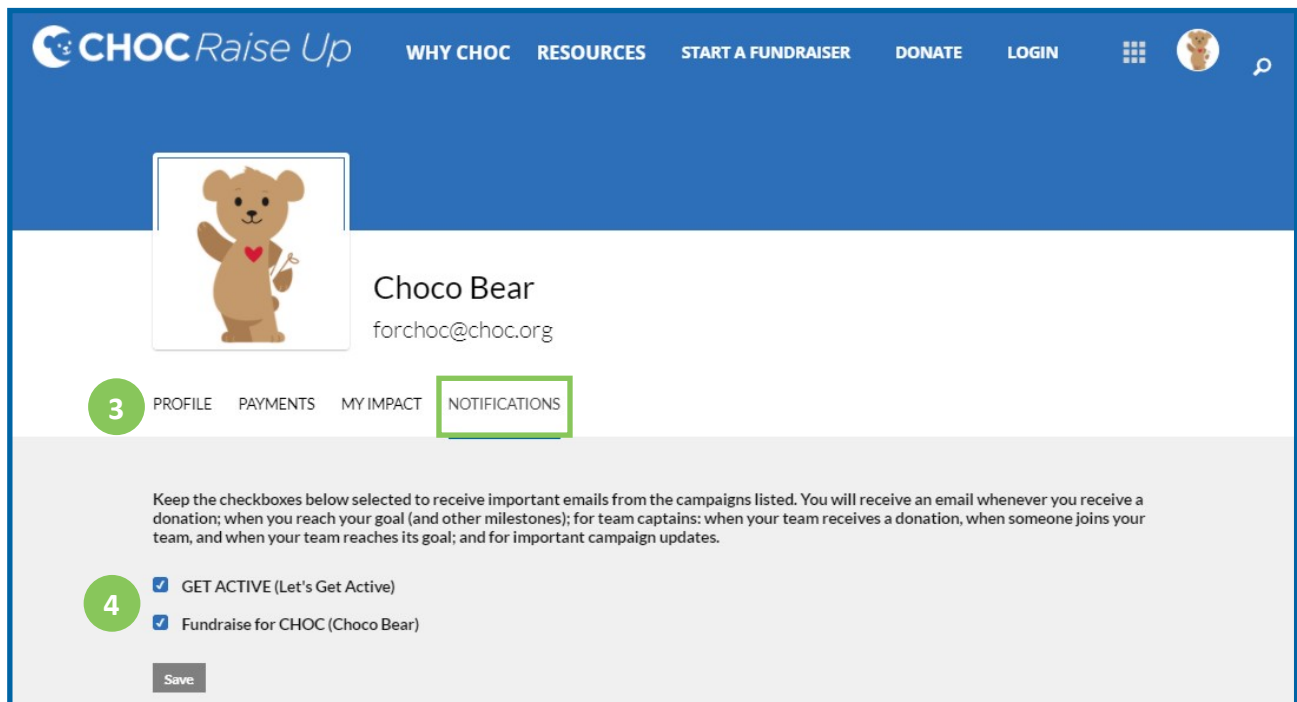*Note: You can navigate to your campaigns by clicking the blue **Dashboard** next to your active campaigns.

HOW TO CHANGE MY NOTIFCATION PREFERENCES

1   **Login** to raiseup.choc.org

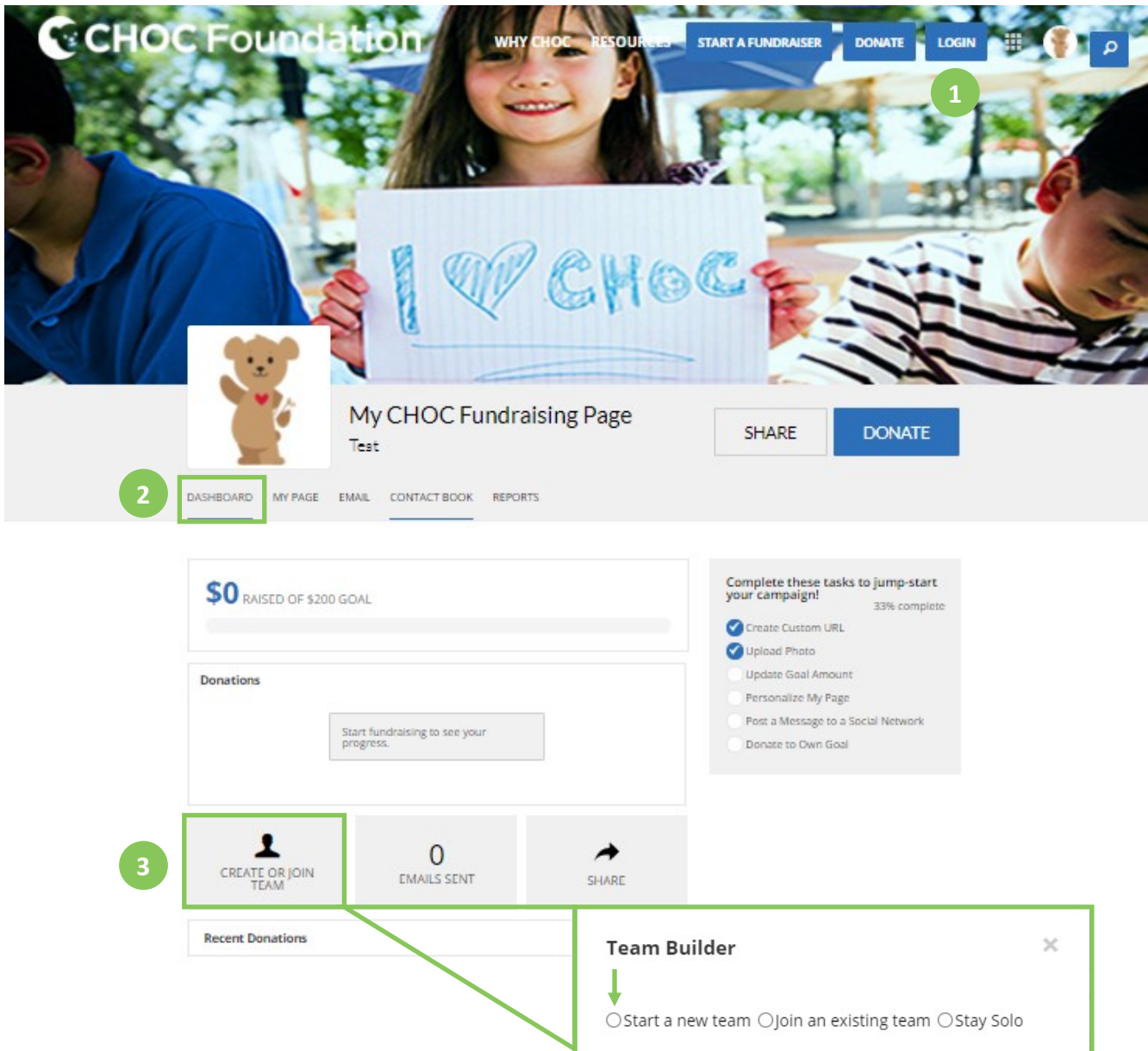**2**   **Click** on the circular image on the top right od the page.

3   Select **Notifications** tab

4   Uncheck the campaigns you no longer want to receive notifications for and click **Save**.
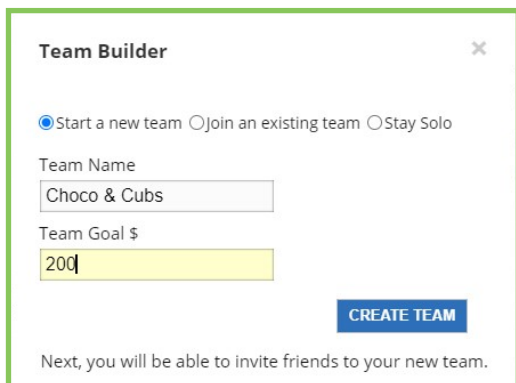
TEAMS

HOW TO CREATE A FUNDRAISING TEAM

1 **Login** to raiseup.choc.org

2 Make sure you are on the **Dashboard** tab.

3 Click **Create or Join Team**. The Team Builder pop-up window will appear and

4

Team Builder ✕

◉ Start a new team ○ Join an existing team ○ Stay Solo

Team Name
Choco & Cubs

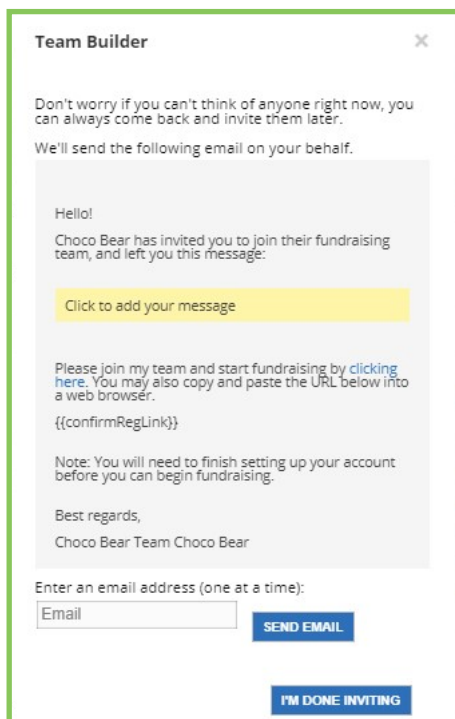Team Goal $
200

CREATE TEAM

Next, you will be able to invite friends to your new team.

4 Once **Start a new team** has been selected, you will create a **Team Name** and a **Team Goal**.

Click the blue **Create Team** button to move to the next step.

Team Builder ✕

Don't worry if you can't think of anyone right now, you can always come back and invite them later.

We'll send the following email on your behalf.

Hello!
Choco Bear has invited you to join their fundraising team, and left you this message:

Click to add your message

Please join my team and start fundraising by clicking here. You may also copy and paste the URL below into a web browser.

{{confirmRegLink}}

Note: You will need to finish setting up your account before you can begin fundraising.

Best regards,

Choco Bear Team Choco Bear

5

6 Enter an email address (one at a time):

Email   SEND EMAIL

I'M DONE INVITING

5 A prompt will appear for you to invite friends to join your fundraising team.

You can use the yellow text box to add a **custom message** to your email invite.

6 Enter an invitee's email into the email text box and click **Send Email.** The system will send your email message to that recipient. You can then add your next invitee's email.

When you are done, click **I'm Done Inviting.** But, don't worry, you can invite more friends later.
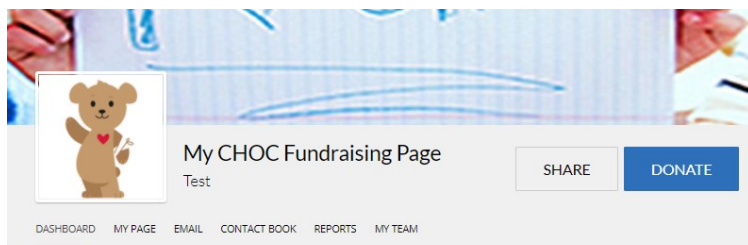
My CHOC Fundraising Page
Test

SHARE   DONATE

DASHBOARD   MY PAGE   EMAIL   CONTACT BOOK   REPORTS   MY TEAM

$0 RAISED OF $200 GOAL

Donations

Start fundraising to see your progress.

Complete these tasks to jump-start your campaign!
33% complete
✓ Create Custom URL
✓ Upload Photo
○ Update Goal Amount
○ Personalize My Page
○ Post a Message to a Social Network
○ Donate to your own campaign

7

| 1 | 0 | ➤ |
| TEAM FUNDRAISER | EMAILS SENT | SHARE |

Recent Donations   View All

7 You're good to go! Great work!

You can see your total number of team fundraisers on your **Dashboard** tab. For more Team information, check out the **My Team** tab.

Need more help? Reach out to us at *raiseup@choc.org*

32

HOW TO JOIN A FUNDRAISING TEAM

1 **Login** to raiseup.choc.org

2 Make sure you are on the **Dashboard** tab.

3 Click **Create or Join Team**. The Team Builder pop-up window will appear and select

4
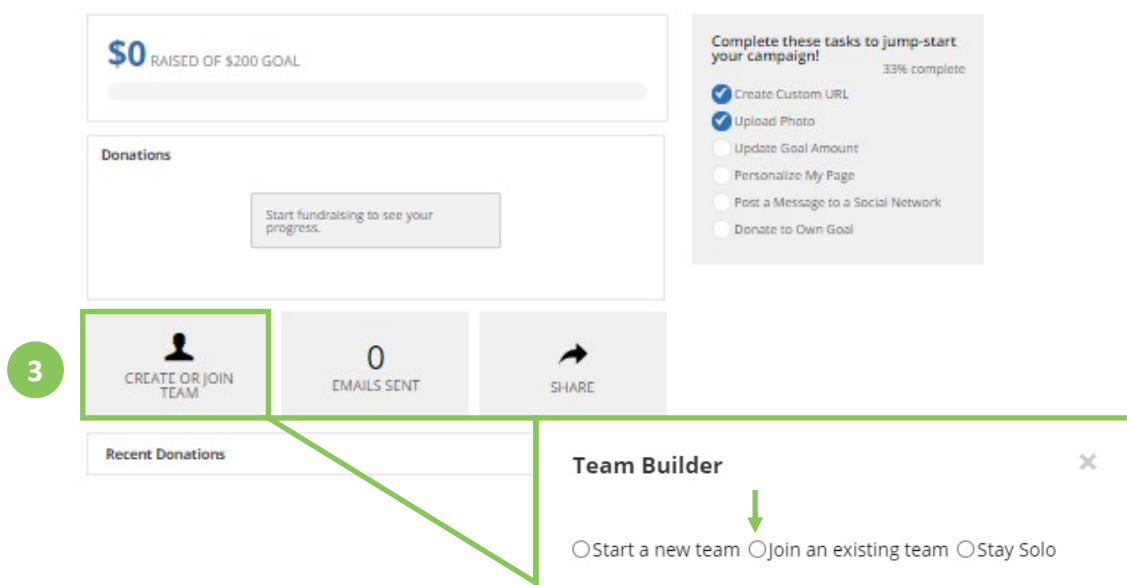
Team Builder ✕

○ Start a new team ● Join an existing team ○ Stay Solo

Team Choco Bear   See list

JOIN NOW

Next, you will be able to invite friends to your new team.

4 Once **Join an existing team** has been selected, you can type in the **Team Name** or click **See list** to find the team you want to join.

Next, click the blue **Join Now** button.

Select a team: ✕

Search:

Teams

Choco & Cubs
Corporate Partnerships Committee
LOT Foundation
SFCH
Team Choco Bear

Team Builder ✕

Thanks! You have successfully joined team: **Team Choco Bear**.

Invite friends to join your team below.
Don't worry if you can't think of anyone right now, you can always come back and invite them later.

We'll send the following email on your behalf.

Hello!
Jamie Ruddocks has invited you to join their fundraising team, and left you this message:

5 Click to add your message

Please join my team and start fundraising by clicking here. You may also copy and paste the URL below into a web browser.

{{confirmRegLink}}

Note: You will need to finish setting up your account before you can begin fundraising.

Best regards,

Jamie

Enter an email address (one at a time):

6 Email   **SEND EMAIL**

I'M DONE INVITING

5 A prompt will appear for you to invite friends to join the fundraising team.

You can use the yellow text box to add a **custom message** to your email invite.

6 Enter an invitee's email into the email text box and click **Send Email.** The system will send your email message to that recipient. You can then add your next invitee's email.

When you are done, click **I'm Done Inviting.** But, don't worry, you can invite more friends later.

My CHOC Fundraising Page
Choco Bear

SHARE   DONATE

DASHBOARD   MY PAGE   EMAIL   CONTACT BOOK   REPORTS   MY TEAM

7 You did it! Great work!

$6 RAISED OF $100 GOAL

Donations   RECENT   ALL TIME

13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 01 02 03 04 05 06

Complete these tasks to jump-start your campaign!
83% complete
✓ Create Custom URL
✓ Upload Photo
   Update Goal Amount
✓ Personalize My Page
✓ Post a Message to a Social Network
✓ Donate to your own campaign

7

3 TEAM FUNDRAISERS
2 EMAILS SENT
SHARE

PRO TIP
! **Don't forget** to donate to your page to show your friends and family that you are leading the charge!

We are here to help! Email us at **raiseup@choc.org**

HOW TO ADD FUNDRAISING TEAM MEMBERS

1   **Login** to raiseup.choc.org

2   Make sure you are on the **Dashboard** tab.

3   Click **Create or Join Team**. The Team Builder pop-up window will appear and select
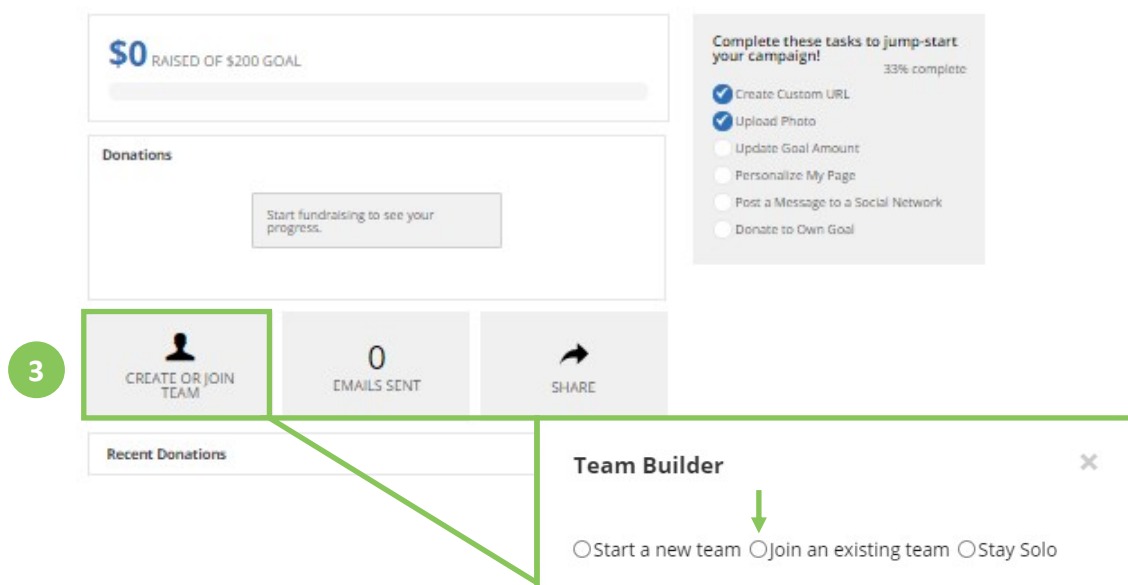
Team Builder

Currently, you are a member of team: **Team Choco Bear**

Click here to invite friends to join your team.

You may also choose to leave your current team and....
○ Start a new team   ○ Switch to a different team   ○ Go Solo

4 When Team Builder window appears, select **Click here** to invite friends to join your team.

Team Builder

Thanks! You have successfully joined team: **Team Choco Bear**.

Invite friends to join your team below.
Don't worry if you can't think of anyone right now, you can always come back and invite them later.

We'll send the following email on your behalf.

Hello!
Jamie Ruddocks has invited you to join their fundraising team, and left you this message:

Click to add your message

Please join my team and start fundraising by clicking here. You may also copy and paste the URL below into a web browser.

{{confirmRegLink}}

Note: You will need to finish setting up your account before you can begin fundraising.

Best regards,
Jamie

Enter an email address (one at a time):
Email   **SEND EMAIL**

I'M DONE INVITING

5 A prompt will appear for you to invite friends to join your fundraising team.

You can use the yellow text box to add a **custom message** to your email invite.

6 Enter an invitee's email into the email text box and click **Send Email.** The system will send your email message to that recipient. You can then add your next invitee's email.

When you are done, click **I'm Done Inviting.** But,

My CHOC Fundraising Page
Choco Bear

SHARE   DONATE

DASHBOARD   MY PAGE   EMAIL   CONTACT BOOK   REPORTS   MY TEAM

$6 RAISED OF $100 GOAL

Donations   RECENT   ALL TIME

Complete these tasks to jump-start your campaign!   83% complete
✓ Create Custom URL
✓ Upload Photo
○ Update Goal Amount
✓ Personalize My Page
✓ Post a Message to a Social Network
✓ Donate to your own campaign

13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 01 02 03 04 05 06

3 TEAM FUNDRAISERS   2 EMAILS SENT   ➚ SHARE

7 **You did it! Great work!**

When your friends register and join your team, you will see the total number of team fundraisers on your **Dashboard** tab increase. For more Team information, check out the **My Team** tab.

Need more help? Reach out to us at **raiseup@choc.org**

36

HOW TO UPDATE MY FUNDRAISING TEAM NAME

1 **Login** to raiseup.choc.org

2 Select the **My Team** tab.

3 In the gray **Team Information** box on the right, click on the underlined **Team Name**.

Update team Name ×

Team Name

Team Choco Bear & Friends

4

SAVE CANCEL

4 A lightbox will appear. Enter your new team name and click the blue **Save** button.

Update team Name ×

Your team name has been updated.
This page will now reload.

5

5 A prompt will confirm the change. Then, the page will reload.

---

6 Now, your **Team Name** is up-to-date.

My CHOC Fundraising Page
Choco Bear

SHARE DONATE

DASHBOARD MY PAGE EMAIL CONTACT BOOK REPORTS MY TEAM

TEAM MEMBER	CAPTAIN	RAISED	GOAL
Choco Bear	🏳	$6.00	$100.00
Jamie	+	$135.00	$100.00
Ann Marie	+	$5.00	$150.00

6

Team Information

Team Name:
Team Choco Bear & Friends
Total Fundraisers: 3
Total Pending Fundraisers: 0
Team Goal: $100.00
Amount Raised Online: $146.00
Amount Raised Offline: $0.00
Total Amount Raised: $146.00

MY TEAM PAGE

Need more help? Reach out to us at **raiseup@choc.org**

38

HOW TO UPDATE MY FUNDRAISING TEAM GOAL

1   **Login** to raiseup.choc.org

2   Select the **My Team** tab.

3   In the gray **Team Information** box on the right, click on the blue **Team Goal** amount.

**4** A lightbox will appear. Enter your new team goal amount and click the blue **Save** button.

5 A prompt will confirm the change. Then, the page will reload.

6 Now, your **Team Goal** is up-to-date.

Pro tip: share network

Need more help? Reach out to us at **raiseup@choc.org**

40

HOW TO ADD CO-CAPTAINS TO MY TEAM

1 **Login** to raiseup.choc.org

2 Select the **My Team** tab.

3 In the gray **Team Information** box on the right, click on the underlined **Team Name**.

TEAM MEMBER	CAPTAIN	RAISED	GOAL
Choco Bear		$6.00	$100.00
Jamie	+	$135.00	$100.00
Ann Marie	+	$5.00	$150.00

Team Information
Team Name: Team Choco Bear
Total Fundraisers: 3
Total Pending Fundraisers: 0
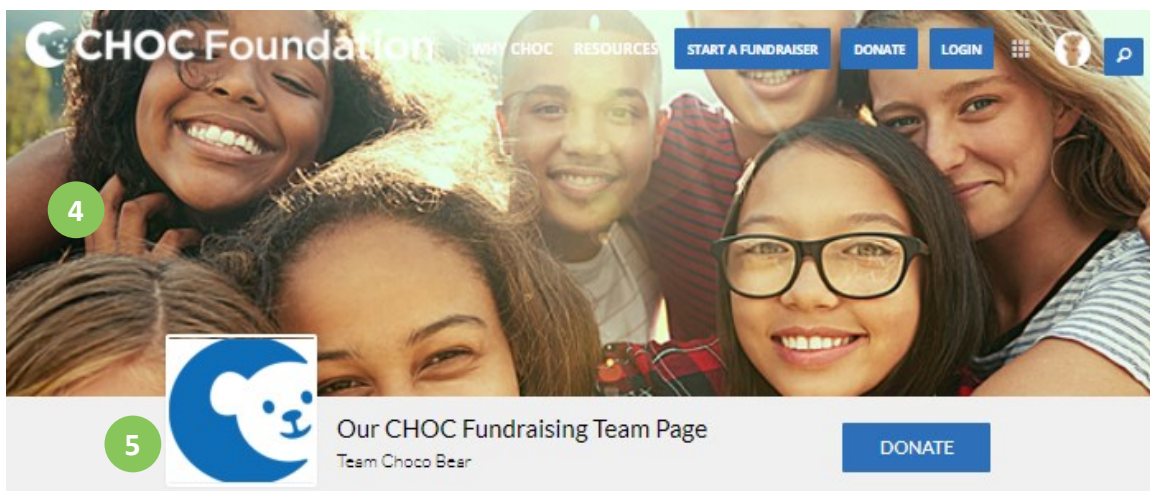Team Goal: $100.00
Amount Raised Online: $146.00
Amount Raised Offline: $0.00
Total Amount Raised: $146.00

MY TEAM PAGE

We are here to help! Email us at **raiseup@choc.org**

41

HOW TO VIEW & PERSONALIZE MY TEAM PAGE

1 **Login** to raiseup.choc.org

2 Select the **My Team** tab.

3 Click on the blue **My Team Page** button.

CHOC Foundation WHY CHOC RESOURCES START A FUNDRAISER DONATE LOGIN

Our CHOC Fundraising Team Page
Team Choco Bear

DONATE

Please help us support CHOC by making a contribution to our team and sharing this page with your family and friends. Every dollar we raise will advance CHOC's great cause!

Together, we can make a difference!

Keep your fans engaged by posting a campaign update.

Choco Bear		$6.00	$
Jamie Ruddocks		$135.00	$
Choco Be		$5.00	$

Comments
0 Comments   Sort by Oldest

Add a comment...

Facebook Comments Plugin

Edit Team Info

A   Photo   URL
Welcome
Message

Goal   Facebook ID

$146
raised of $150 goal

Donate

$25	$50	$100
$250	$500	$1,000
Other		

3 Fundraisers
recruited

0
shares

Recent Donations

4 **Campaign Image:** To edit, hover over the image and click to change.

5 **Team Profile Image:** To edit, hover over the image and click to change.

6 **Welcome Message Text**

7 **Edit My:** This menu lets you make this page yours!

Welcome Message: This is where you can tell your network how your are fundraising (birthday, activity, event, etc.) and why you support CHOC.

URL: You can edit your unique webpage link. Use your name or get creative. We **DO NOT** recommend changing your URL after you have shared it with your network.

Goal: Need to move your fundraising goal up or down? Just click here!

Facebook ID: You can connect your Facebook user ID* to moderate your friends' comments on your fundraising page.

*Facebook User ID can be found in Facebook Settings & Privacy > Settings > Apps & Websites > Click View and dit next to any app > scroll and copy User ID)

8 **Add Updates:** Keep your donors and visitors to your page engaged and in the loop by adding videos, photos, or text updates. Donors can comment on your updates below each post.

9 **List of Team Members/Leaderboard**: Not only can your donors click the donate button to donate to the team, they can also donate to a specific team member by clicking on the blue dollar signs next to the team members.
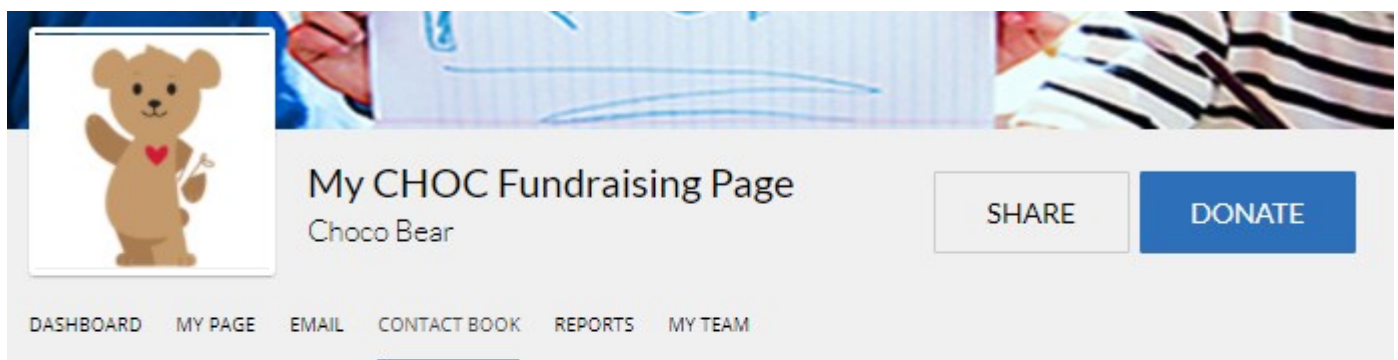
Need more help? Reach out to us at **raiseup@choc.org**

SHARE

SOCIAL MEDIA

We are here to help! Email us at **raiseup@choc.org**

46

HOW TO ADD CONTACTS

1 **Login** to raiseup.choc.org
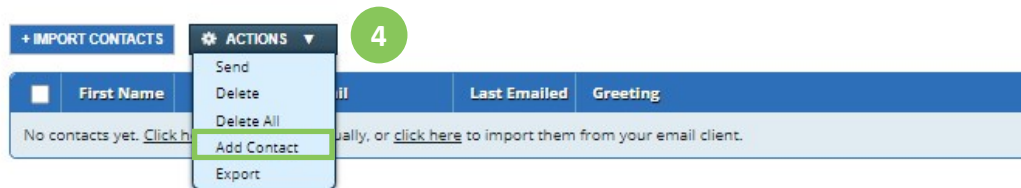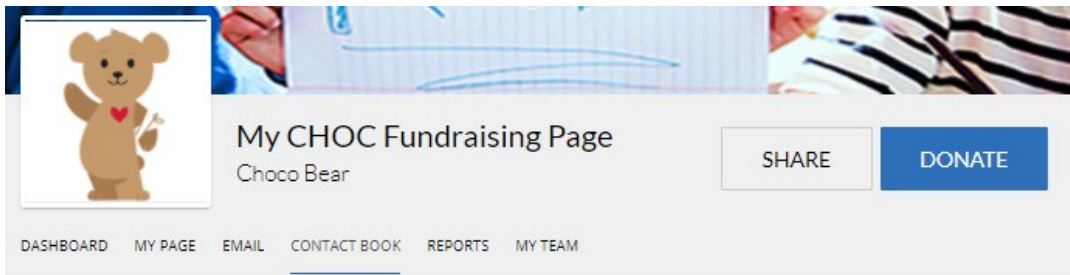
2 Select the **Contact Book** tab.

3 You can add contacts:
- **Manually**
- **Import from a file**
- **Import from another account**
- **Import from another campaign** (if you have more than one fundraising page)

ADDING CONTACTS MANUALLY:

4 Click on **Actions** menu and select **Add Contact**

5 **Add a New Contact** window will appear.
Enter your contact's information:
First Name
Last Name
Email
Greeting (ex. "Hello [name]!")

Click **Add Contact** to save.
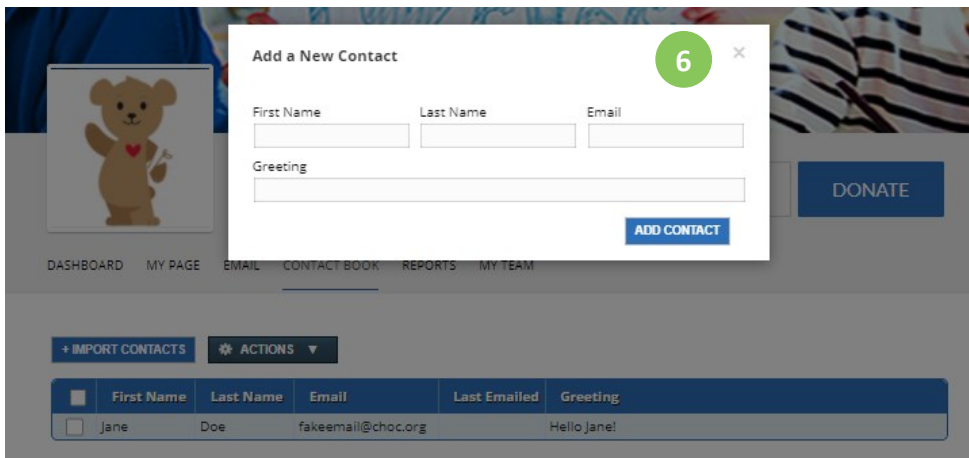
6 Continue to add contacts or if you are finished, click the "**X**" in the top right.
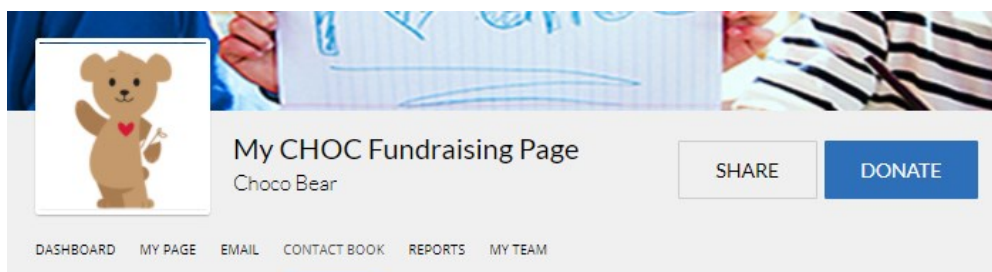
7 ALL DONE!

A list of contacts added will appear on your **Contact Book** page.

ADDING CONTACTS FROM ANOTHER ACCOUNT:

4 Click on the **+ Import Contacts** button.
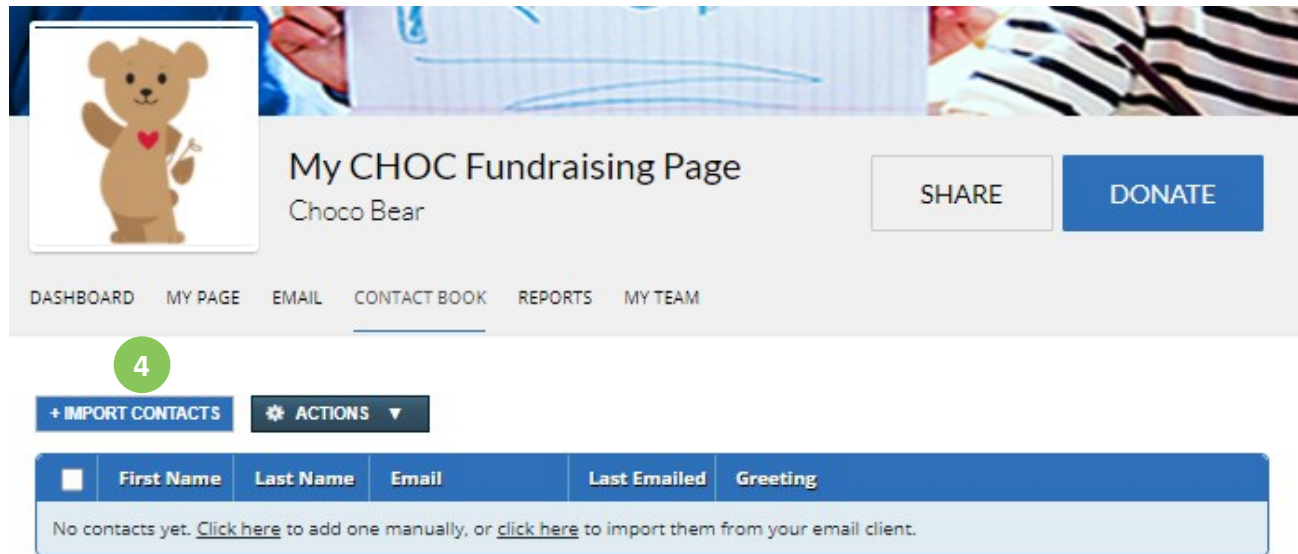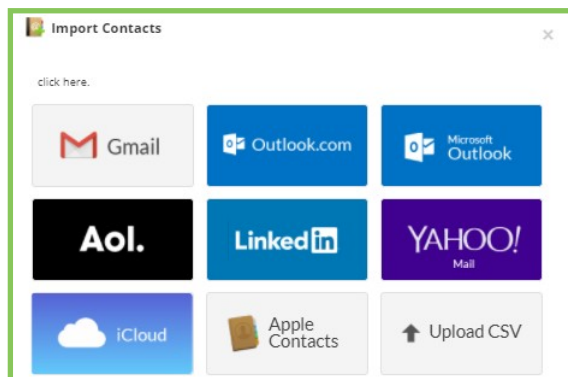
5 Select an account from which you want to import your Contacts.

To import from email accounts, you will need to (1) sign in to your account and (2)authorize sharing with NeonOne/Rallybound.
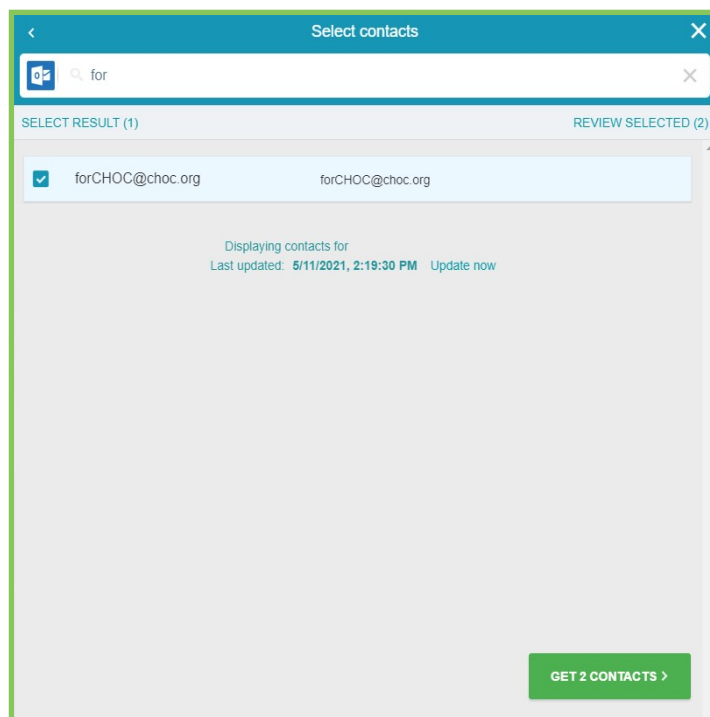
6 **Check the box** next to contacts you want to add. Use the search bar to find people with ease.
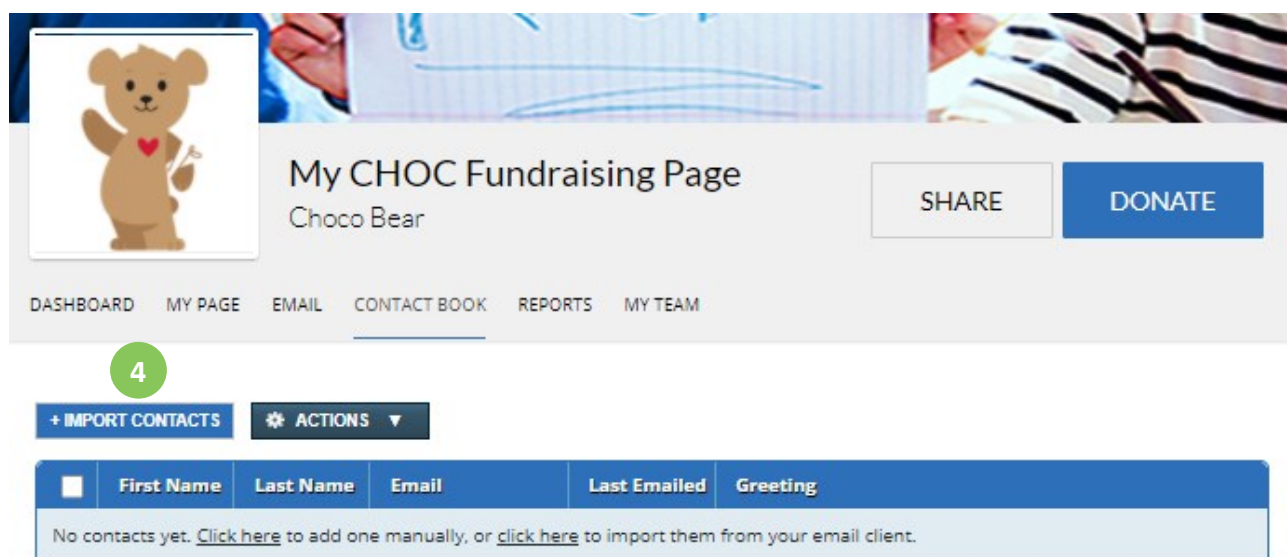
Click **Get (#) Contacts** to add.

7 **ALL DONE!**

A list of contacts added will appear on your **Contact Book** page.

7

	First Name	Last Name	Email	Last Emailed	Greeting
	Jane	Doe	fakeemail@choc.org		Hello Jane!
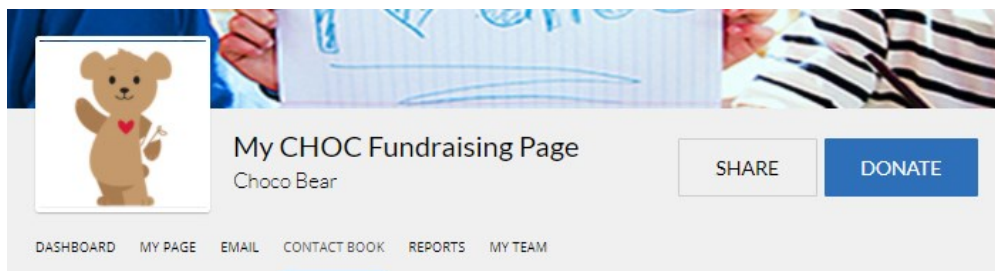
IMPORTING FROM A FILE:

4 Click on the + **Import Contacts** button.

4

	First Name	Last Name	Email	Last Emailed	Greeting

No contacts yet. Click here to add one manually, or click here to import them from your email client.

5 **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

5 Download the **CSV Template** by clicking the blue **click here** link.

4   Open the **CSV Template** and enter the names and email addresses of you contacts.
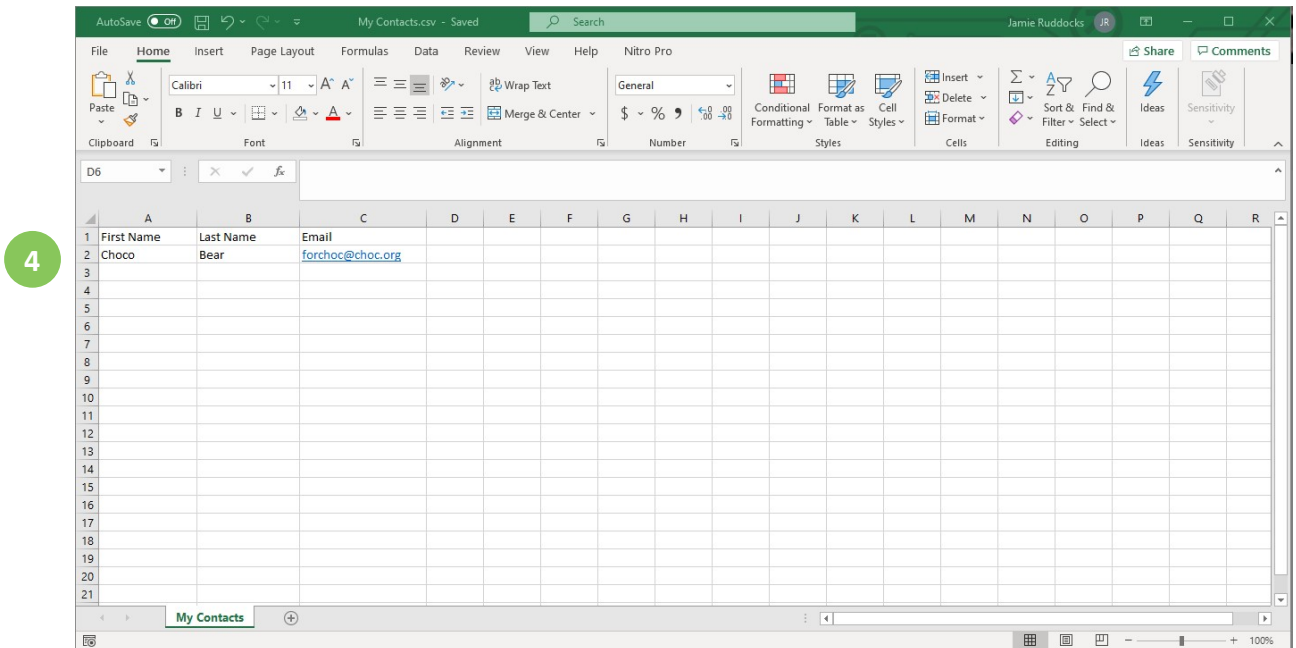
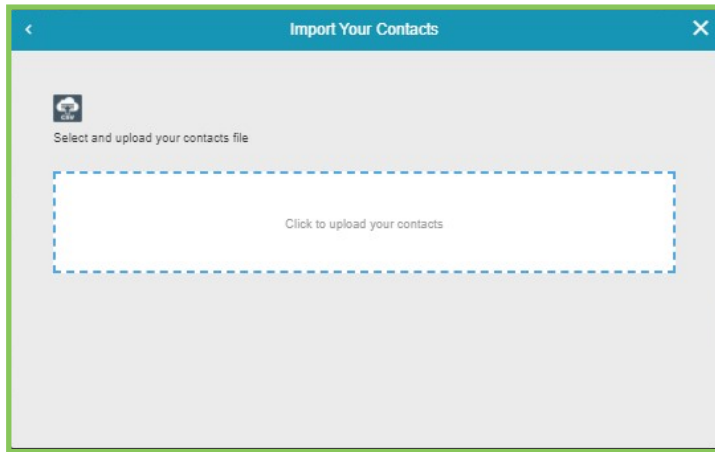**5**   Save the **CSV Template** to your computer
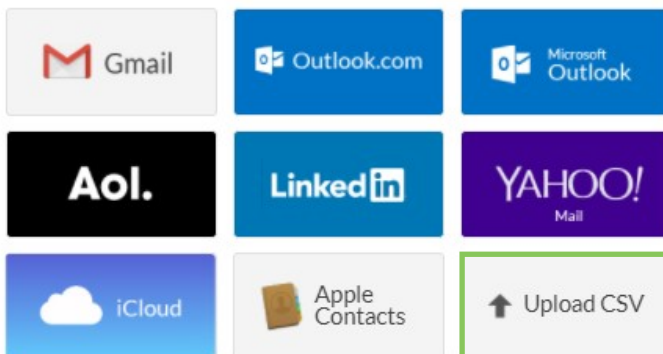
6   Return to the fundraising platform and select **Upload CSV**.
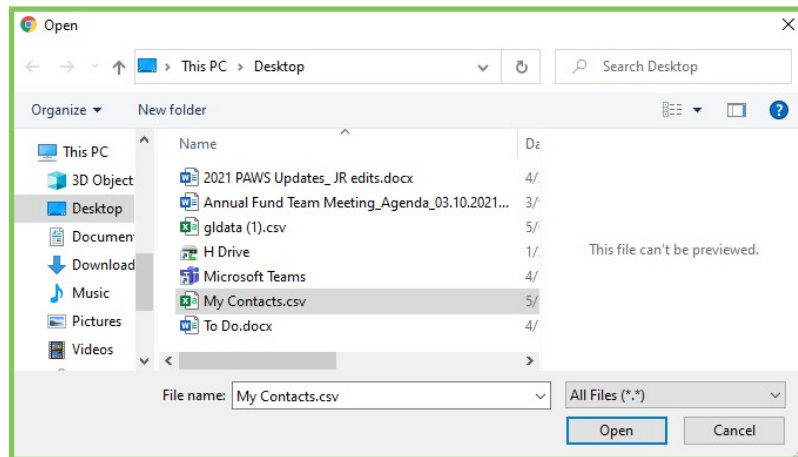
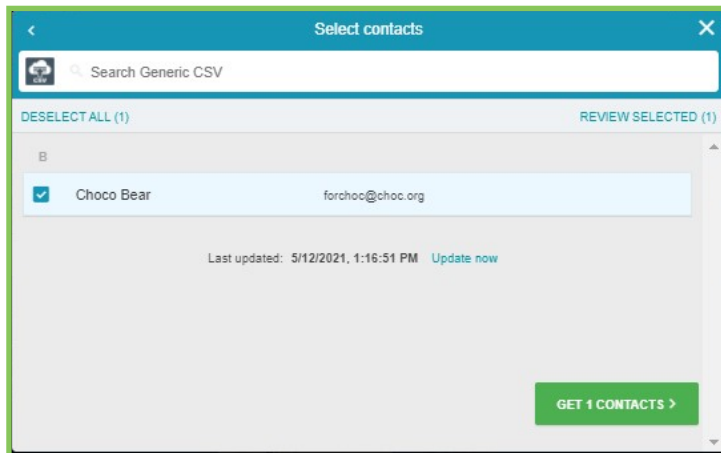**7**   Click the box with the dotted border to upload a file.

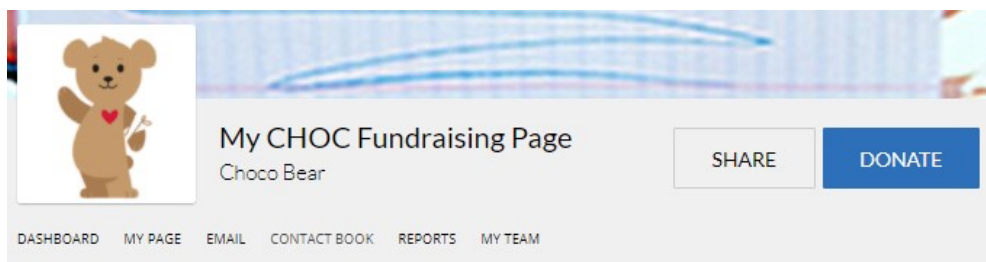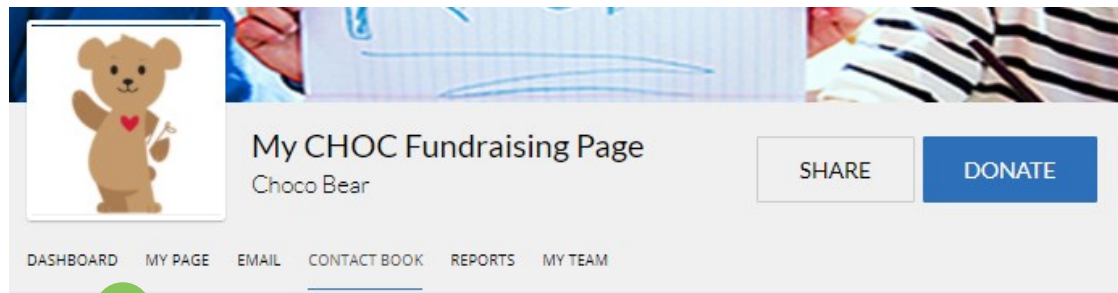**8**   Select file from your computer and click **Open**.

9   **Check the box** next to contacts you want to add. Use the search bar to find people with ease.

Click **Get (#) Contacts** to add.

10   ALL DONE!

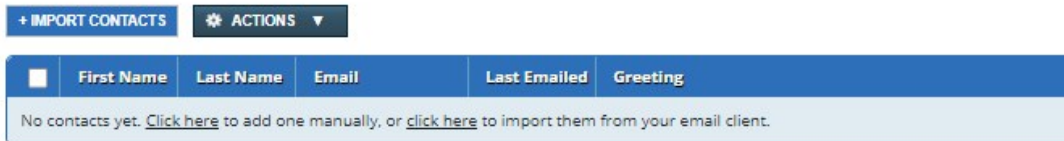A list of contacts added will appear on your **Contact Book** page.
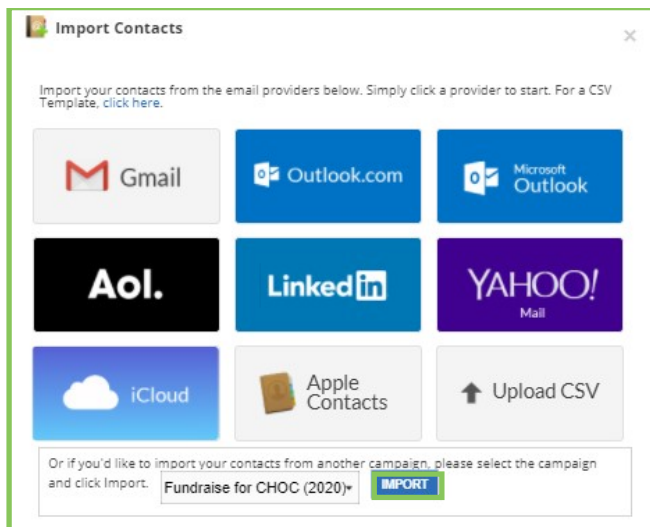
IMPORTING FROM ANOTHER CAMPAIGN:
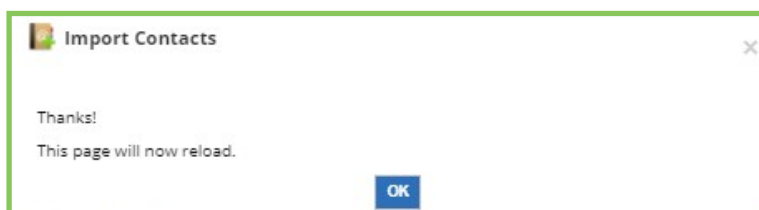
4 Click on the **+ Import Contacts** button.
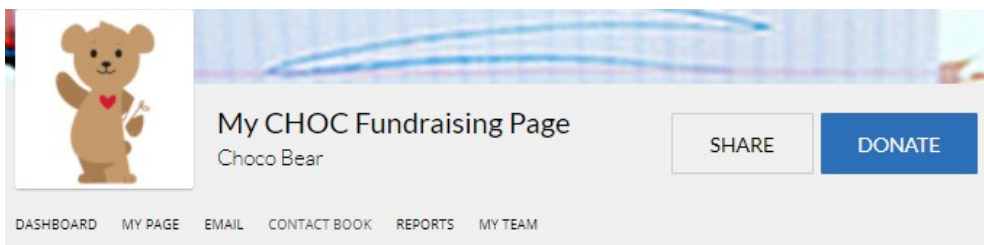

5 Click the blue **Import** button.

If you have more than one fundraising page, you will see the option to upload from another campaign. If not, you will need to use another method to add contacts.

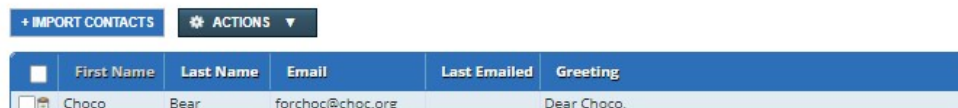**6** A prompt will confirm the change. Then, the page will reload.

7 **ALL DONE!**

A list of contacts added will appear on your **Contact Book** page.

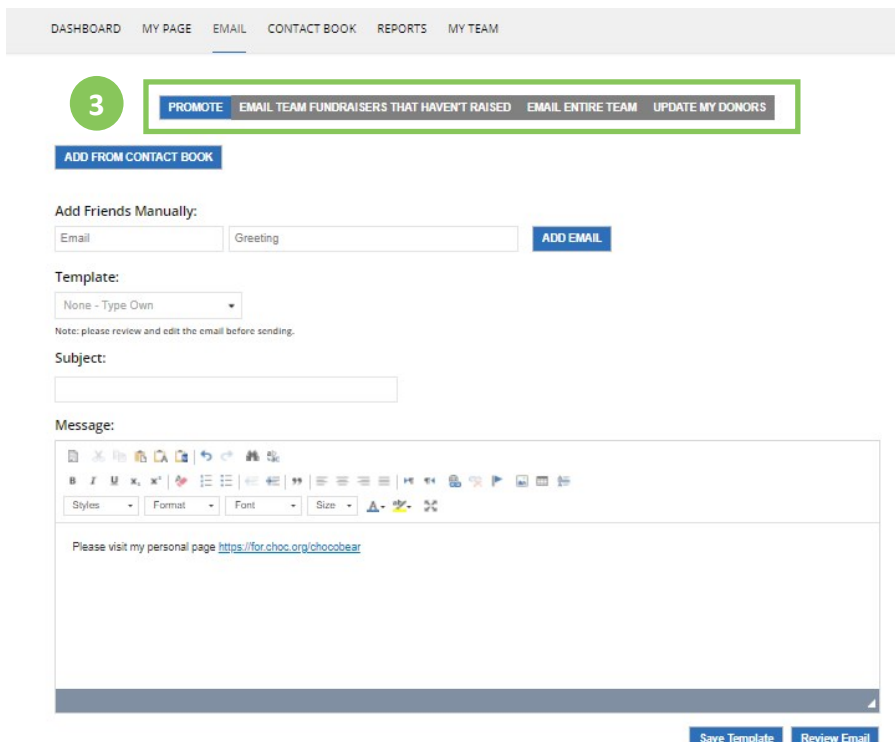Need more help? Reach out to us at **raiseup@choc.org**

53

HOW TO SEND EMAILS

1 **Login** to raiseup.choc.org

2 Select the **Email** tab.

3 Choose the **Type of Email** you want to send. You can **Promote** your fundraiser to any contacts in your network, automatically email **Team Fundraisers who Haven't Raised**, automatically email the **Entire Team,** or send updates to contacts that have already donated.

4 If you select Promote, choose Contacts from your Contact Book or add them manually.*

*Note: You DO NOT need to add contacts for the **Email Team Fundraisers That Haven't Raised, Email Entire Team,** and **Update My Donors** options because the system has a contact list based on who has registered for you team and contacts that have donated.*

5 Now, it's time to compose your email. Add a **Subject** line. Then, write and format your email in the **Message** box.

PRO TIP

Check out the Templates for quick pre-written emails to send to your network. They are a great starting point, if you aren't sure what to say!

55

6 Once you are happy with you message, click **Review Message**

7 The **Preview Email** box will appear for any last minute changes you want to make to the email message.

When you are ready to send, click **Send # Emails.**

If you need to make more changes or add contacts, click **Cancel** *to return to the* **Email** *tab.*

8 Once you click Send Emails, a box will appear confirmation the email(s) were sent.

Need more help? Reach out to us at **raiseup@choc.org**

56

HOW TO MODERATE FACEBOOK COMMENTS

1 **Login** to raiseup.choc.org

2 Click on the **My Page** tab.

3 Under **Edit My**, click **Facebook ID** icon.
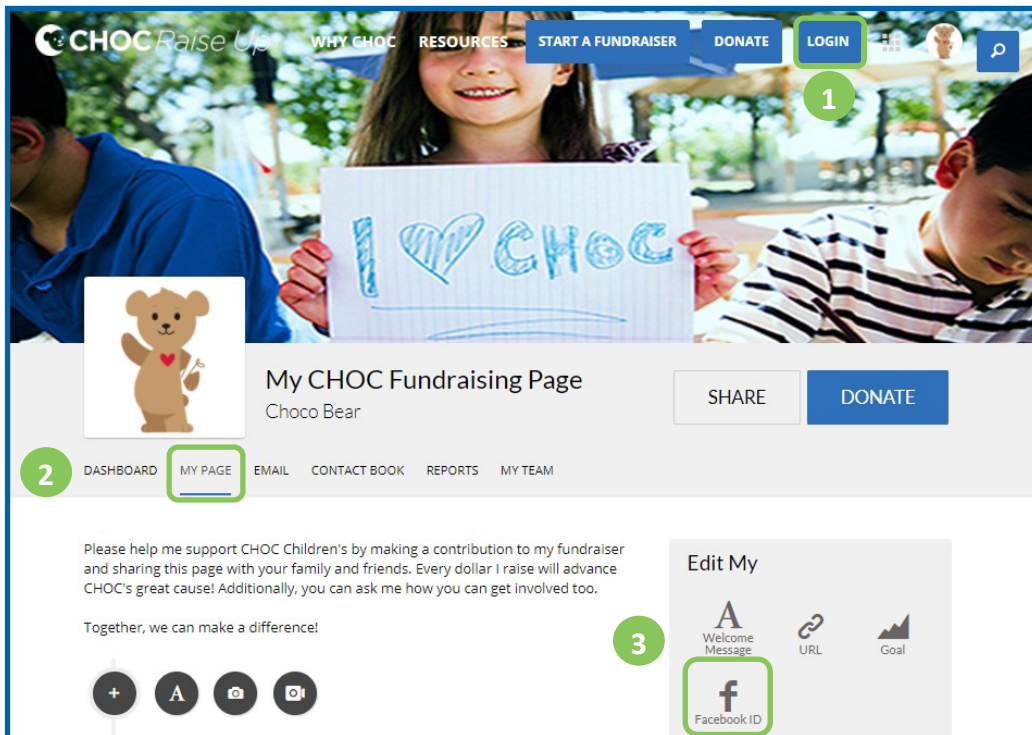
4 The Edit your Facebook ID (to moderate comments) pop-up will appear. Locate and enter your **Facebook ID** and click **Save**.

Facebook User ID can be found on your Facebook profile:
⇒ Login to Facebook
⇒ Click on Facebook Settings & Privacy
⇒ Click on Settings
⇒ Click on Apps & Websites
⇒ Click View and edit next to any app Scroll and copy User ID
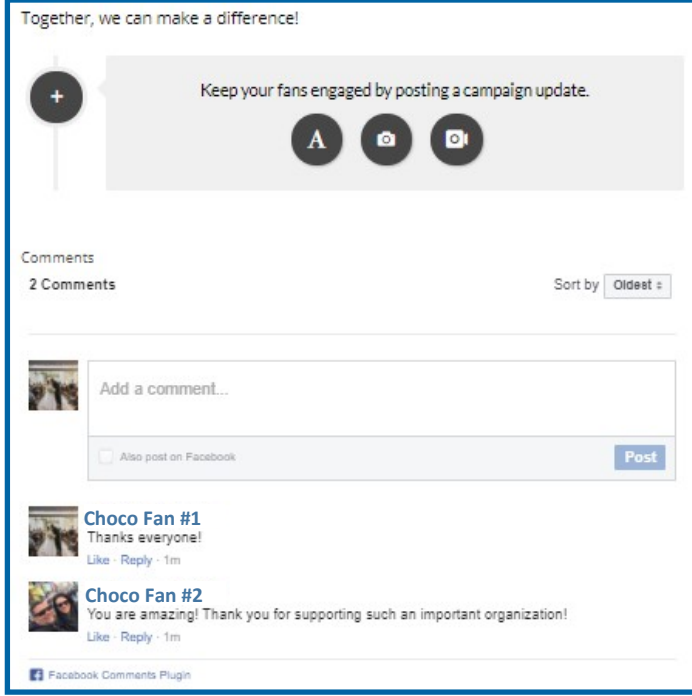
5 Return to **My Page** and find the Facebook comments under the **Updates** section.
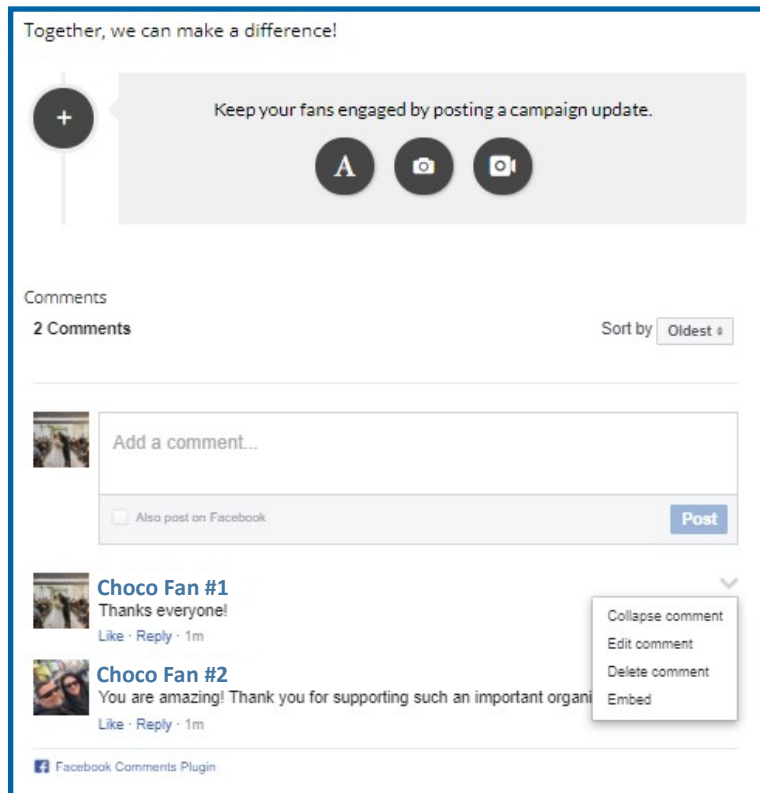
6 **Hover** to the right of the comment you want to moderate and select how you want to change the comment.

We are here to help! Email us at *raiseup@choc.org*

58

REPORTS

HOW TO VIEW DONATIONS TO MY FUNDRAISER

1 **Login** to raiseup.choc.org

2 Select the **Reports** tab.
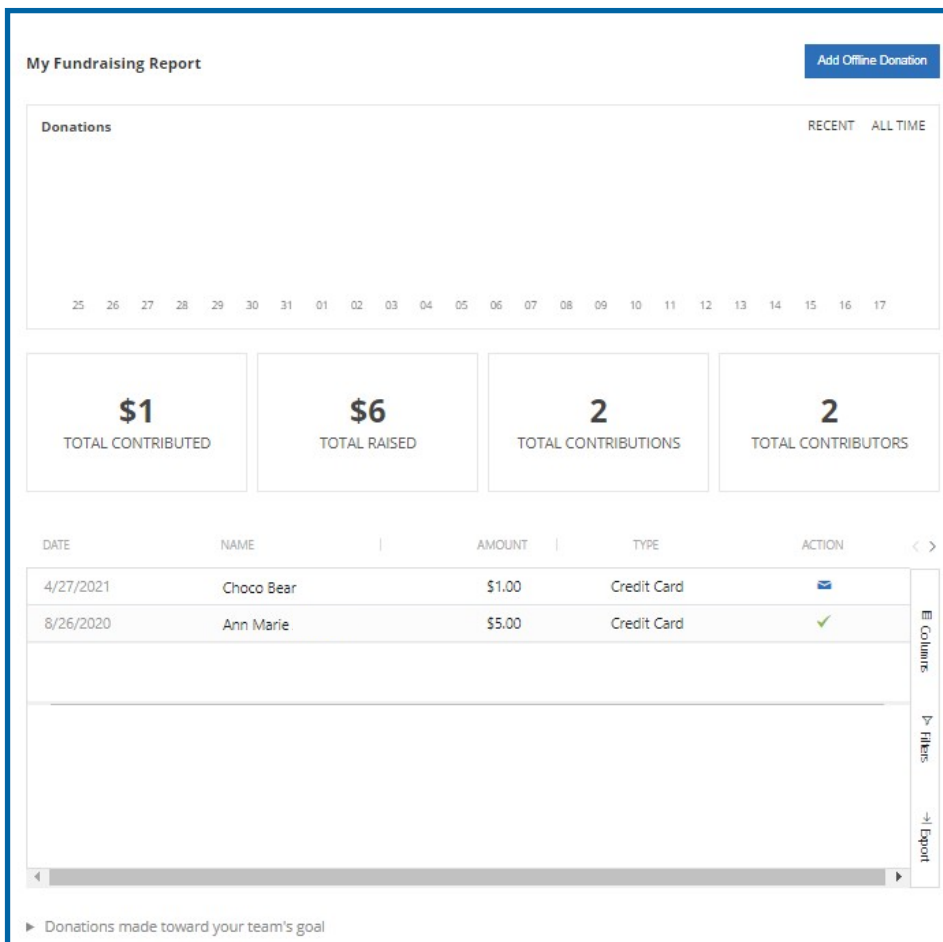
3 The **Reports** dashboard shows donations to your fundraiser in several ways: chart of gift over time, relevant statistics of your contributions and funds raised, and a list of all donations made.

You can also view the donations made toward the team goal below.

DATE	NAME	AMOUNT	TYPE	
4/27/2021	Choco Bear	$1.00	Credit Card	
8/26/2020	Ann Marie Jacobus	$5.00	Credit Card	

☰   ⊞

📌 Pin Column   ▸

Autosize This Column
Autosize All Columns

▤ Group by Action

Reset Columns

▶ Export

▼ Donations made toward your team's goal

DATE	NAME	AMOUNT	TYPE	TOWARD FUN...	ACTION	‹ ›
4/27/2021	Choco Bear	$1.00	Credit Card	Choco Bear	✉	
10/21/2020	Michael Jacobus	$5.00	Credit Card	Ann Marie Jacobus	✉	
8/26/2020	Ann Marie Jacobus	$5.00	Credit Card	Choco Bear	✓	

▤ Columns   ▷ Filters   ▶ Export

The **Reports** dashboard has several features to organize your data:

4   **Columns** can be sorted, filtered, visible or hidden, grouped, sized, etc. by clicking next to the column names. There are columns for: Date, Name, Amount, Type, Status, Recurring, Email Sent, and Actions.

5   You can export the list for your records by clicking **Export**.

Need more help? Reach out to us at **raiseup@choc.org**

61

HOW TO SEND A THANK YOU TO DONORS

1 **Login** to raiseup.choc.org

2 Select the **Reports** tab.

3 In the list on the **Reports** dashboard, click on the blue envelope icon next to the gift you want to send a thank you for.

Send Thank You Email ✕

We'll send the following email on your behalf.

Dear {{Donor-First-Name}},

Choco Bear sends a personal thank you for your recent ${{Donation-Amount}} donation towards their CHOC Raise Up fundraising page.

Here is Choco's personal message:

> Thank you so much! Your gift means so much! ●

Thanks for your support!

Team CHOC Raise Up
CHOC Foundation
O: 714-509-8690 | E: RaiseUp@choc.org |
W: CHOC Raise Up
#CHOCRaiseUp #forCHOC

CHOC *Raise Up*

SEND EMAIL

4 The **Send Thank You Email** pop-up will appear.

You can add a personal message to the email to share your own thanks to your donors.

When you are done, click **Send Email.**

5 **ALL DONE!** After your donor has been sent and email thank you, you will see a green check mark next to the gift in the **Reports** dashboard.

DATE	NAME	AMOUNT	TYPE	ACTION	‹ ›
4/27/2021	Choco Bear	$1.00	Credit Card	✓	
8/26/2020	Ann Marie	$5.00	Credit Card	✓	

Columns   Filters   Export

PRO TIP

! For a printable way to share your gratitude with your supporters, check out our Thank You Template on the Resources section of raiseup.CHOC.org.

For additional support, you can reach us at **raiseup@choc.org**
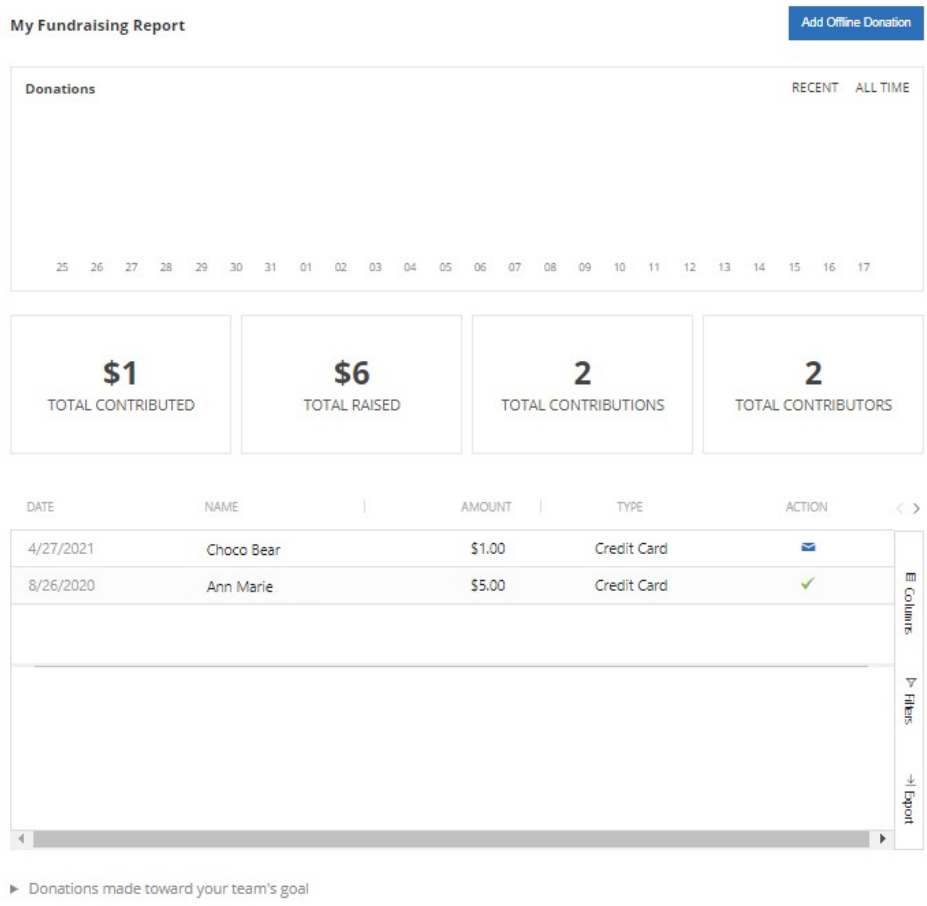
HOW TO ADD OFFLINE DONATIONS

1 **Login** to raiseup.choc.org

2 Select the **Reports** tab.

3 Click blue **Add Offline Donation** button in the top right-hand corner of the **Reports** dashboard.

4

Enter Donation

First Name: Mama
Last Name: Choco
Address: 1120 W. La Veta
Apt:
Country: UNITED STATES
City: Orange
State: CA
Zip: 92863-570(
Email: forchoc@choc.org
Donation Message:

Donation Type: Cash

Amount: $ 10
Date Received: 08/17/2021

SUBMIT DONATION

4 The **Enter Donation** pop-up will appear. Complete the donor's and donation information then, click **Submit Donation.**

5 ALL DONE! The donation will appear in the **Reports** dashboard.

*If you added the gift in error, click the blue **Delete** link next to the gift.*

5

| DATE	NAME	AMOUNT	TYPE	ACTION
8/17/2021	Mama Choco	$10.00	Cash	Delete
4/27/2021	Choco Bear	$1.00	Credit Card	✓
8/26/2020	Ann Marie Jacobus	$5.00	Credit Card	✓

Columns Filters Export

IMPORTANT
Your offline donation will be **verified** by a member of the CHOC Raise Up team, when the donation is received.

For additional support, you can reach us at **raiseup@choc.org**

OTHER

HOW TO ADD ACTIVITY TO THE TRACKER

1 **Login** to raiseup.choc.org

2 Select the **Reports** tab.

3 Click on the blue **Enter Activity** button.

4 The Enter Activity pop-up will appear, enter details of your activity and click **Add Activity.**
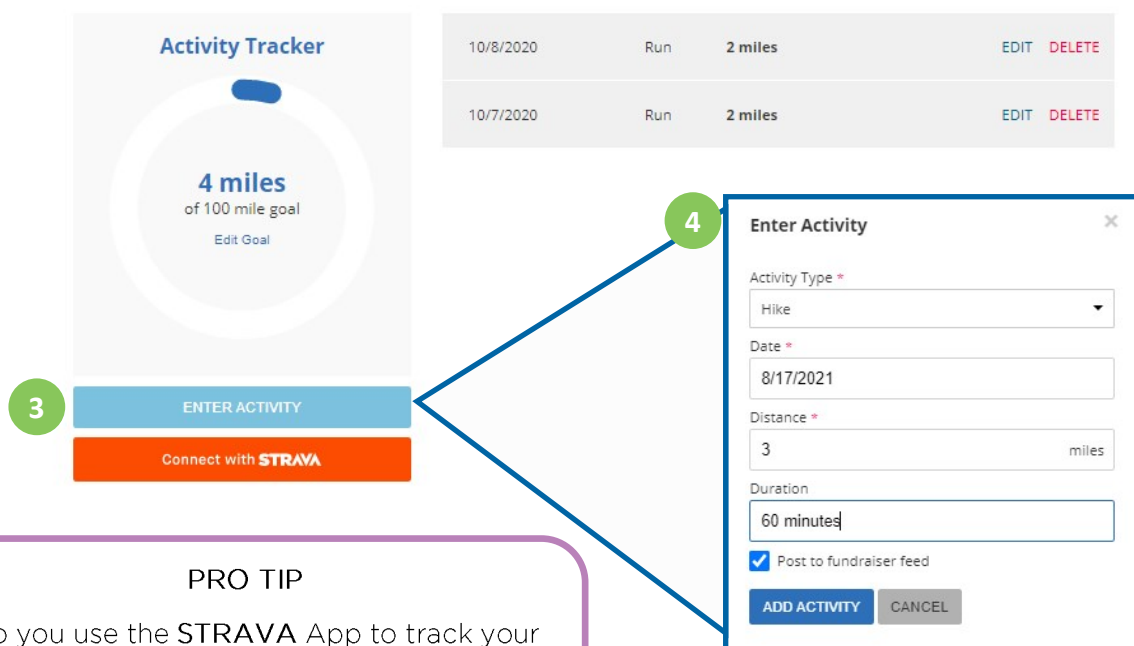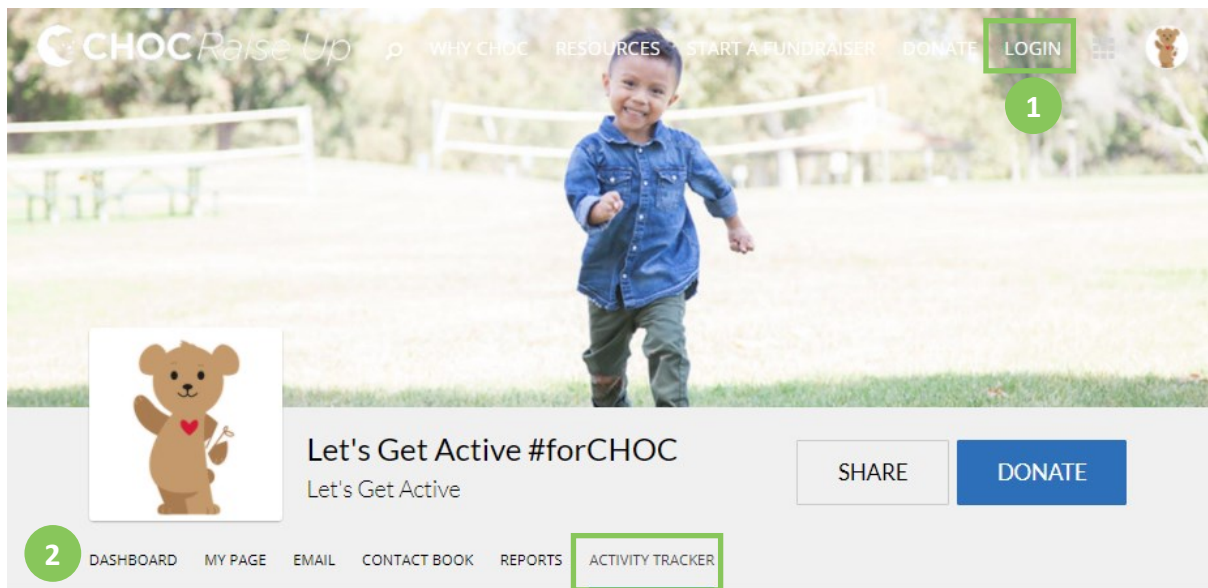
PRO TIP

Do you use the **STRAVA** App to track your physical activity? Use the orange button to connect your STRAVA account to add your activity to your fundraising page automatically.

5 **SUCCESS!** The new activity will appear on your Activity Tracker and count toward your goal!

HOW TO UPDATE ACTIVITY GOAL

1. **Login** to raiseup.choc.org

2. Select the **Reports** tab.

3. Click **Edit Goal** inside the **Activity Tracker**.

4. The Update Goal Amount pop-up will appear, enter your new goal and click **Save**.