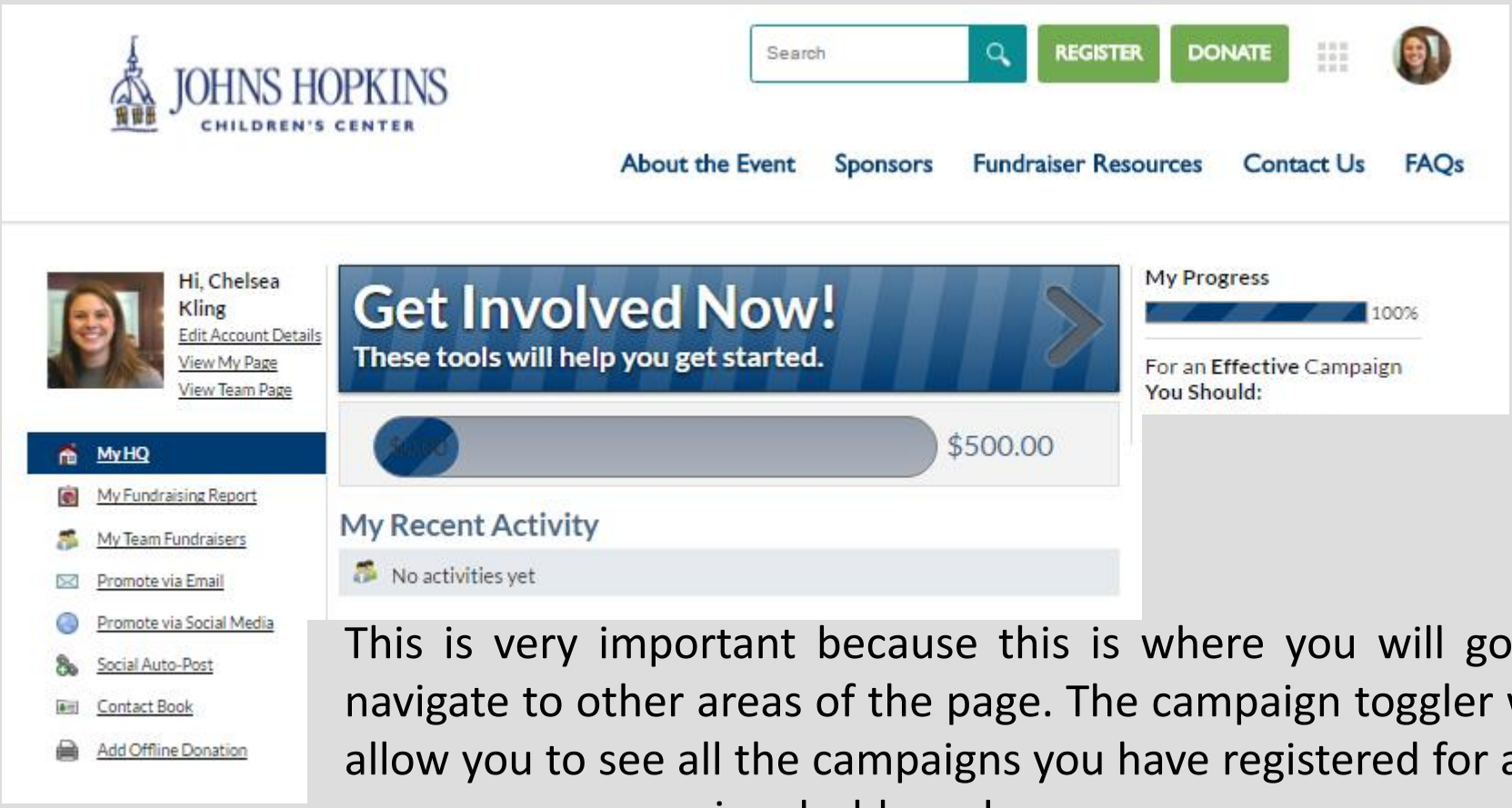
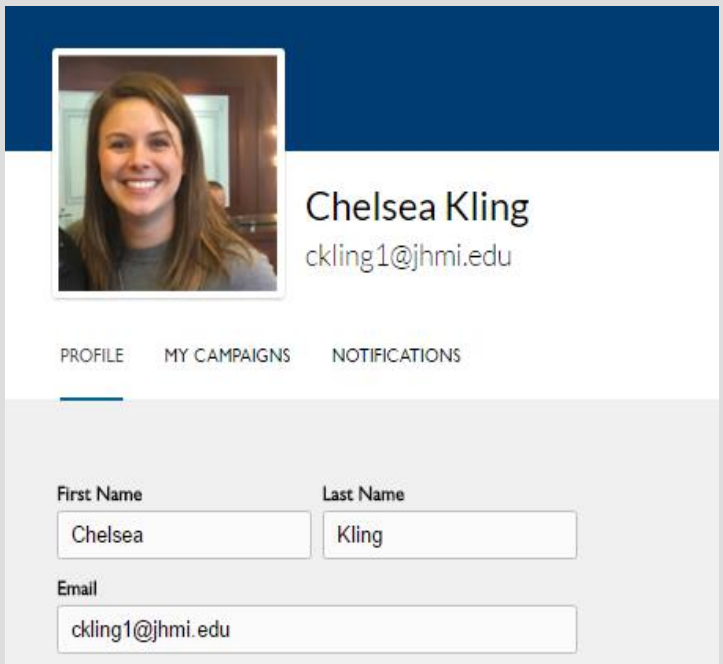
Fundraiser
Guidebook

Fundraiser
Headquarters

Once your account has been created and you log in, you will be brought to your very own Campaign Dashboard.



This is very important because this is where you will go to navigate to other areas of the page. The campaign toggler will allow you to see all the campaigns you have registered for and access your campaign dashboard.



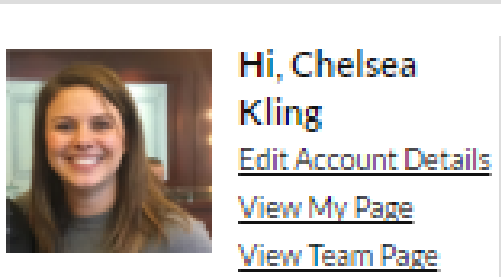
Your Profile will allow you to update personal information, such as name, email address, password and physical address.

You can also view your campaigns and access your Fundraiser Dashboard by selecting “My Campaigns”.

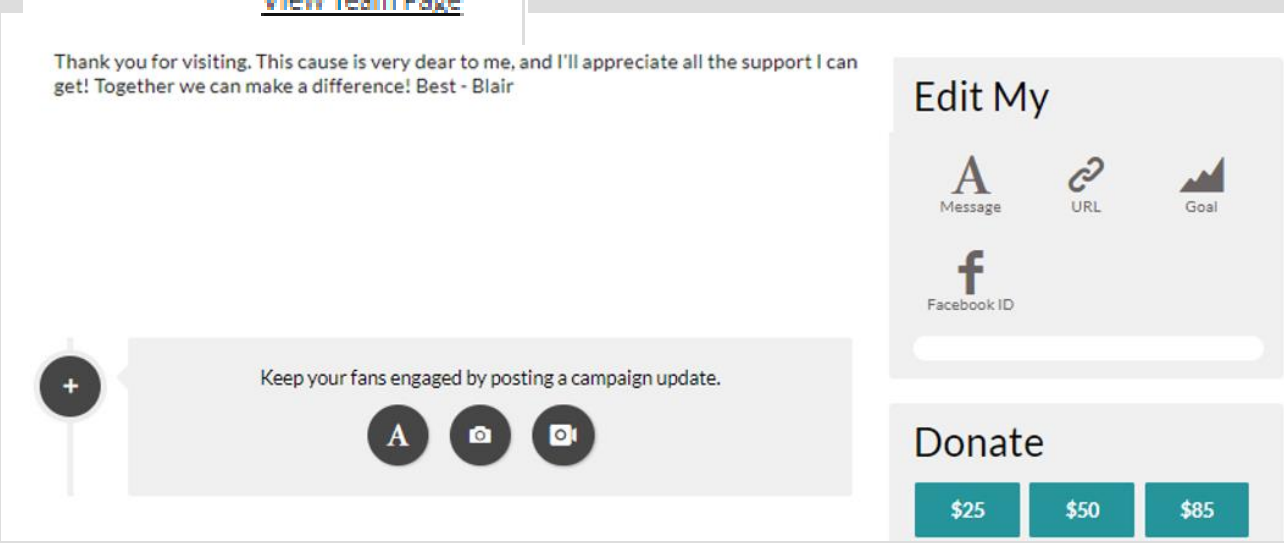
The Notifications tab will allow you to manage what email notifications you receive for each campaign.

Personalize your **Fundraiser Page**

Personalizing your page is one of the most important things you will do as a fundraiser. Johns Hopkins Children's Center has added some defaults but you want to take the extra step to make this page yours!



To edit your personal page, select "View My Page" or "View Team Page" in the upper right-hand corner.

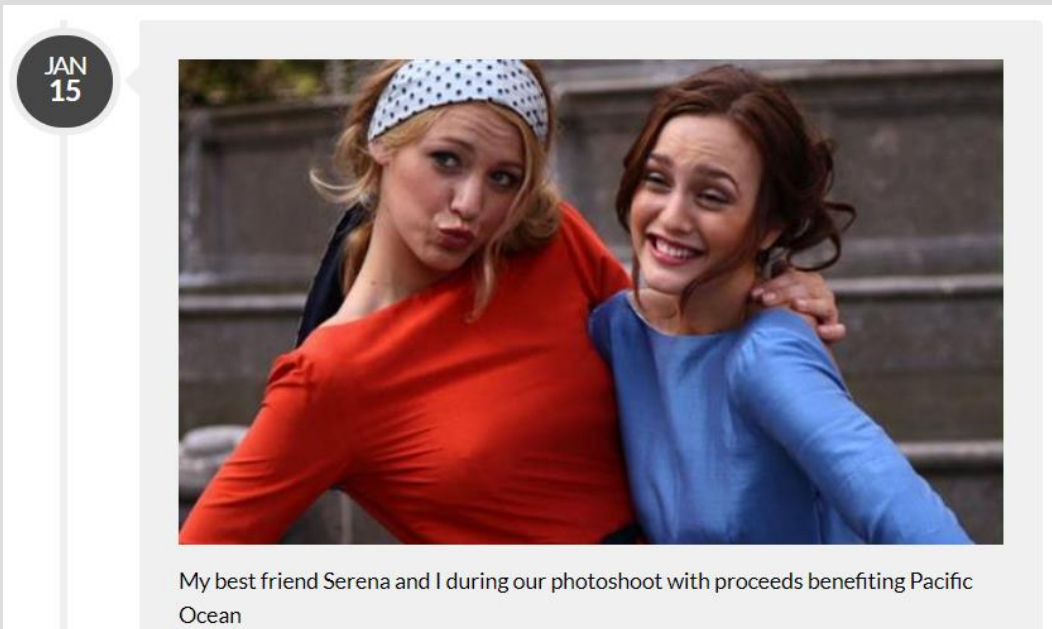


Select "A – Message" to update your Header and the body of your message.

URL – Update the URL that will be distributed to your network.

Goal will allow you to update your fundraising goal.

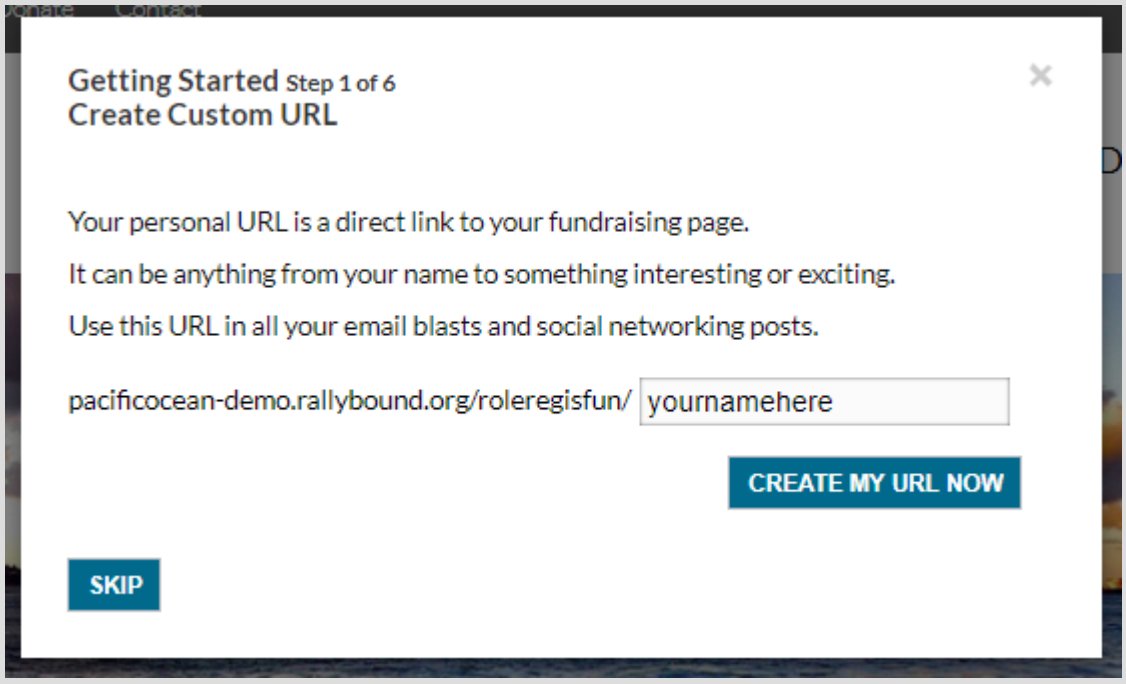
Facebook ID allows you to moderate comments submitted by others on the bottom of your page.



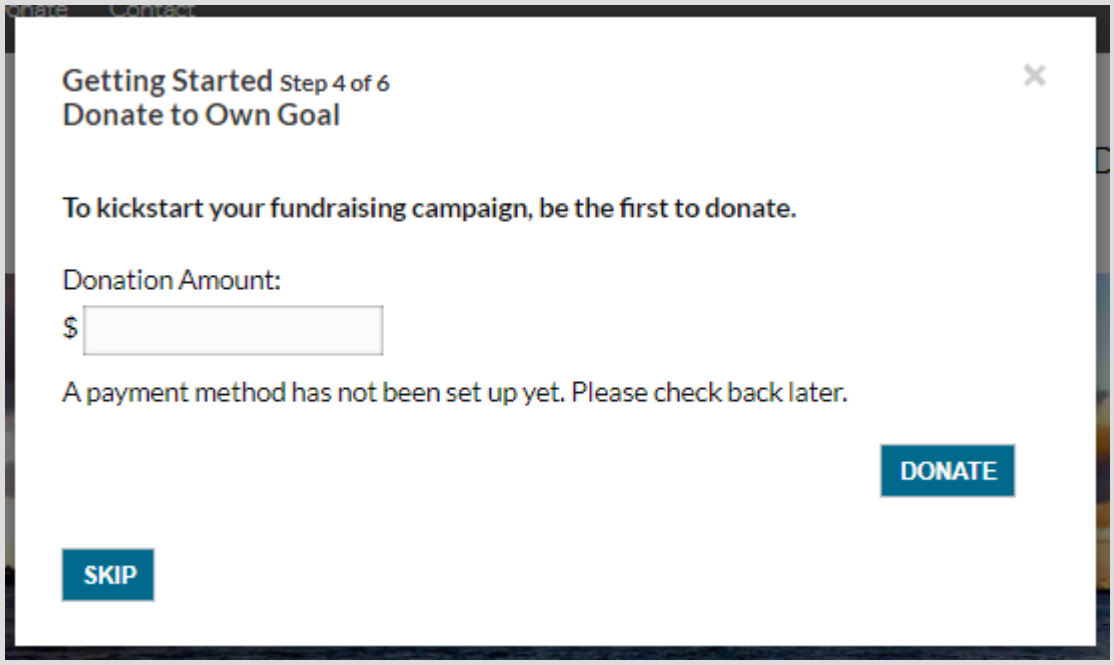
On the bottom of the page is the "Fundraiser Feed", which is a living, open connection from the fundraiser to their network. Each update to the feed includes a date stamp with content; a text blog, image or video accompanying the post.

Fundraiser
Headquarters 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.

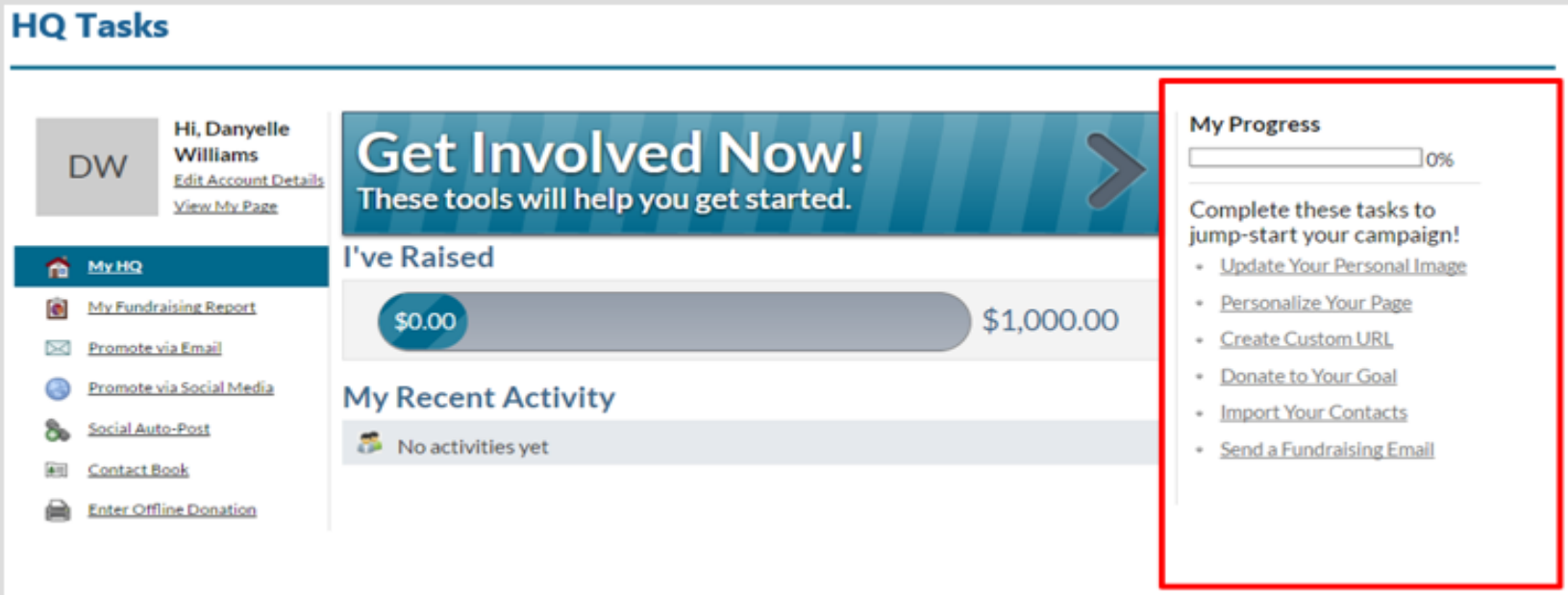


1) You can see how many steps exist by looking at the very top.
2) If you do not have information for that task you can choose to “Skip” and come back to it at a later time



Fundraiser
To-Do List

On the far right (within the red box) are tasks referred to as “HQ Tasks”, which some may be familiar if they appeared in the pop-up after registration was complete.



Default tasks include:

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 your personal page. (pg. 6)

Create Custom 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.

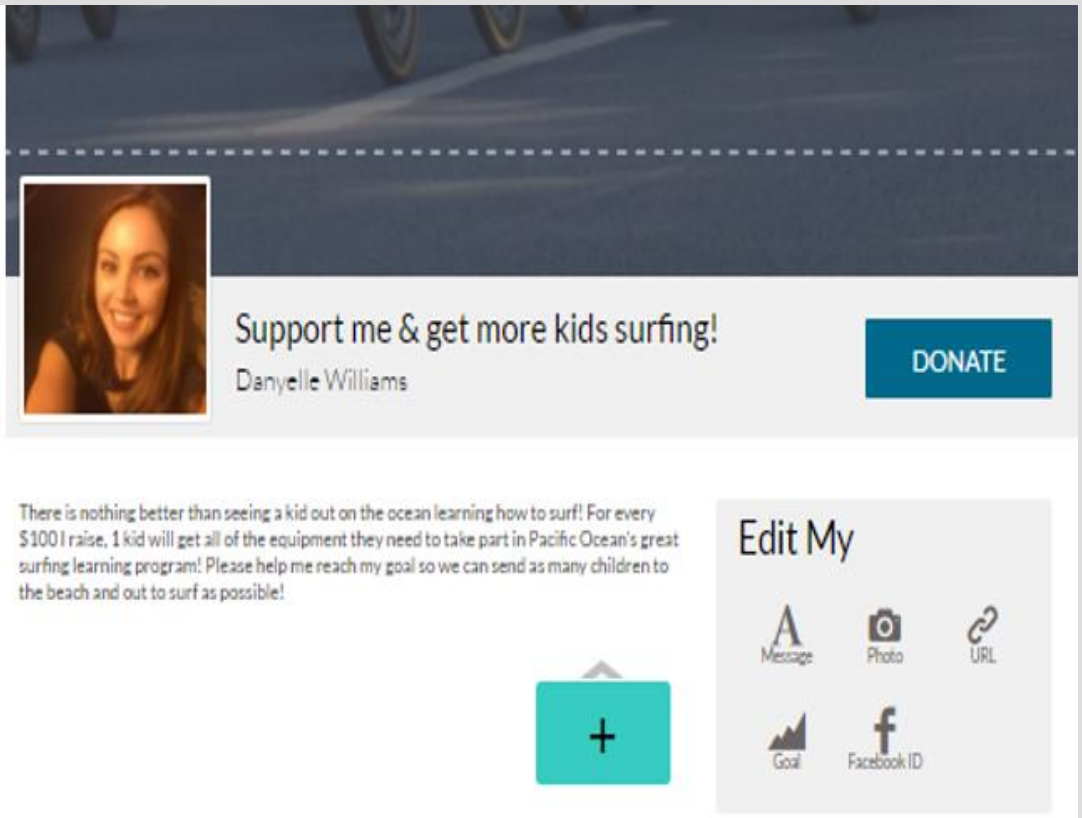
Donate to Own Goal – Lead by example and donate to your cause yourself.

Import Your Contacts – Selecting this task will take you to your contact book (which can also be found on the left hand side of your HQ) – (pg. 7)

Send a Fundraising Email – Reach out to your donors to encourage them to participate or thank them for their support (pg. 8)

Personalize your **Fundraiser Page**

This is the area of your Headquarters where you get to update your website!



A default campaign image will exist along the top of your page. You can use the default available or you can update your own.

Select "A – Message" to update your Header and the body of your message.
The photo option refers to your profile image.
URL allows you to update your campaign URL.
Goal will allow you to update your fundraising goal.
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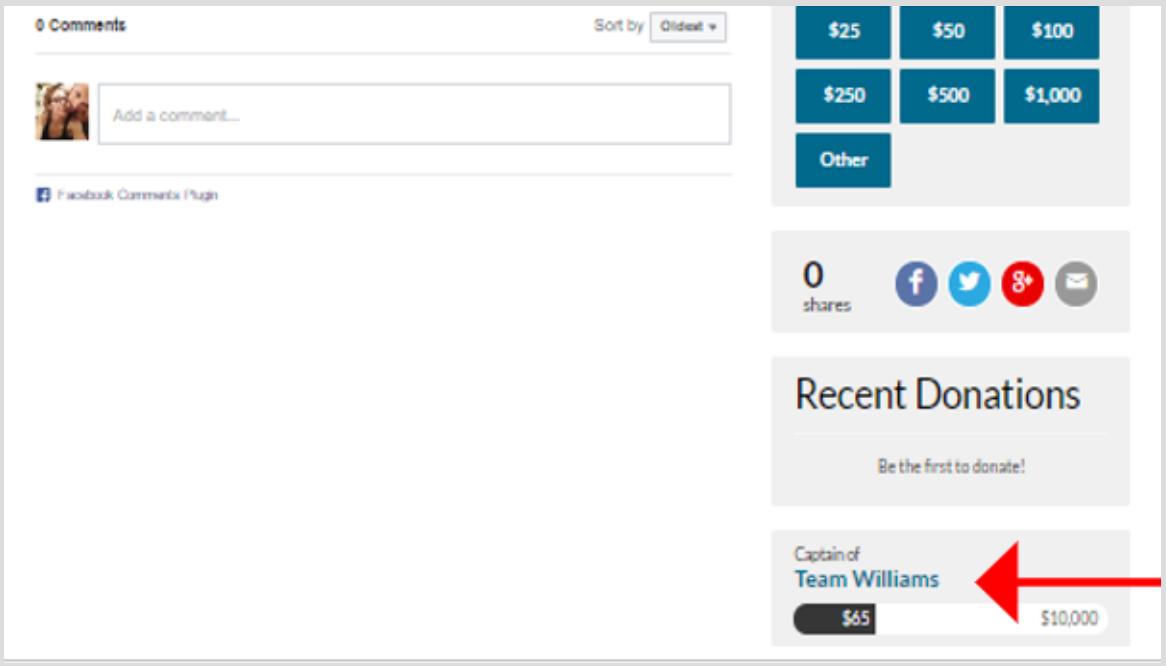
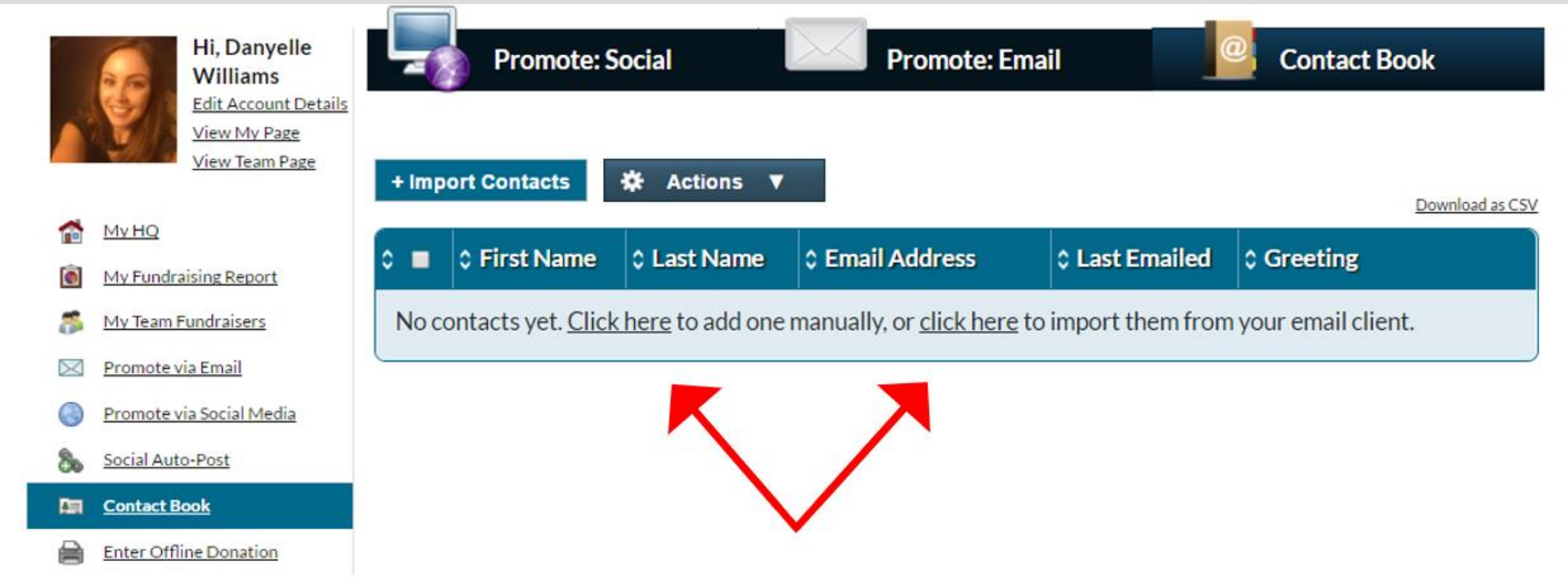
By clicking the plus sign, you can add personalized videos and images to your site to reflect your journey or the



If you are a Team Captain or a member of your team you can edit the Team Page in the same way by scrolling to the bottom of the page and selecting the team name.

Import your
Contacts to better Fundraise



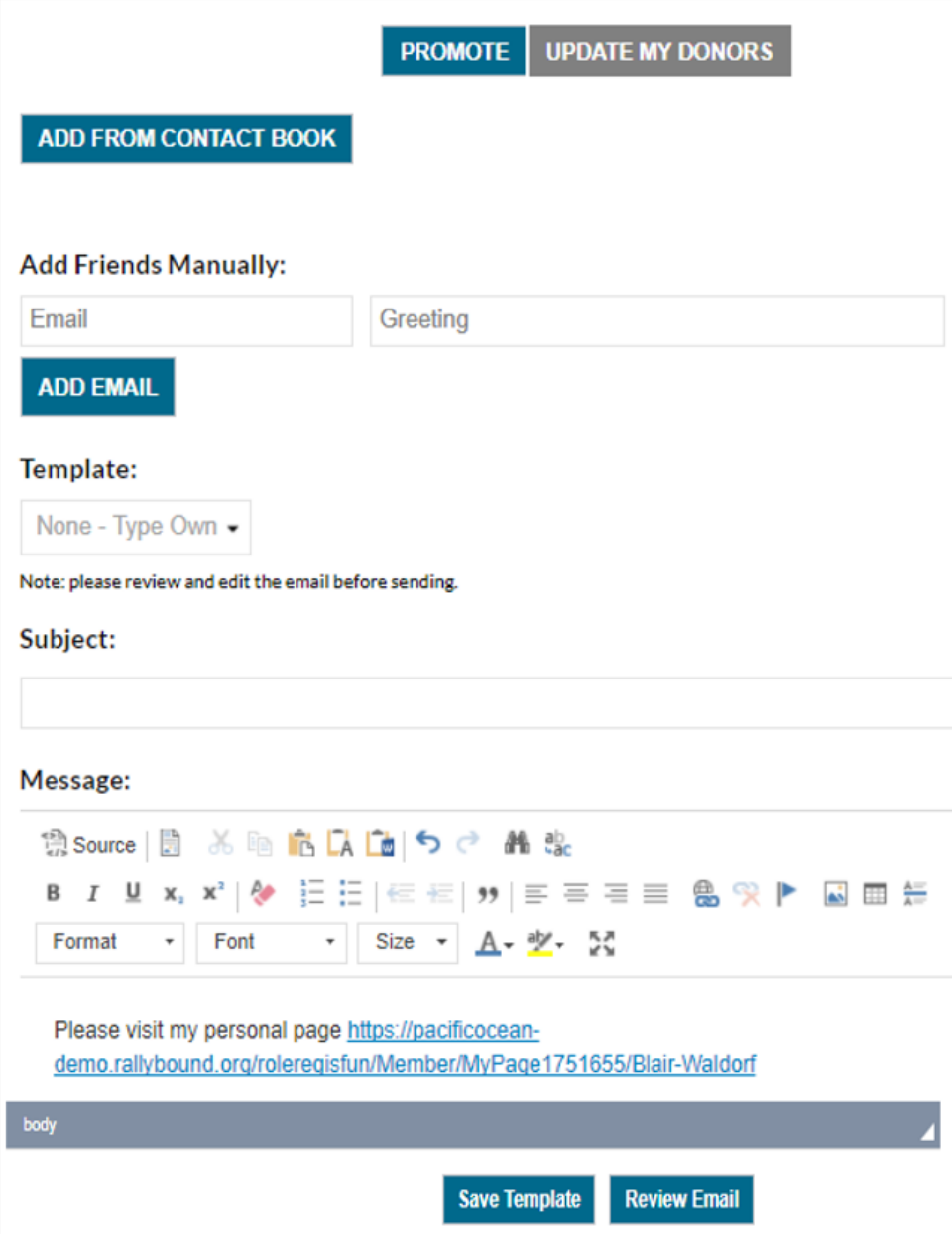
Selecting the task to “Import Your Contacts” will take you to your contact book.

From here you can load your contacts to start promoting your campaign. Add contacts individually with their email address by selecting “Click here”. To import contacts from your personal email, select “Click here” and choose the appropriate email client. You can also upload through a CSV file.

This will allow you to share your fundraising page with family, friends, colleagues, neighbors, co-workers and your community.

Fundraiser
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 there will be an option to send the “Verification Email” again so you have the ability to send emails through RallyBound.



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.

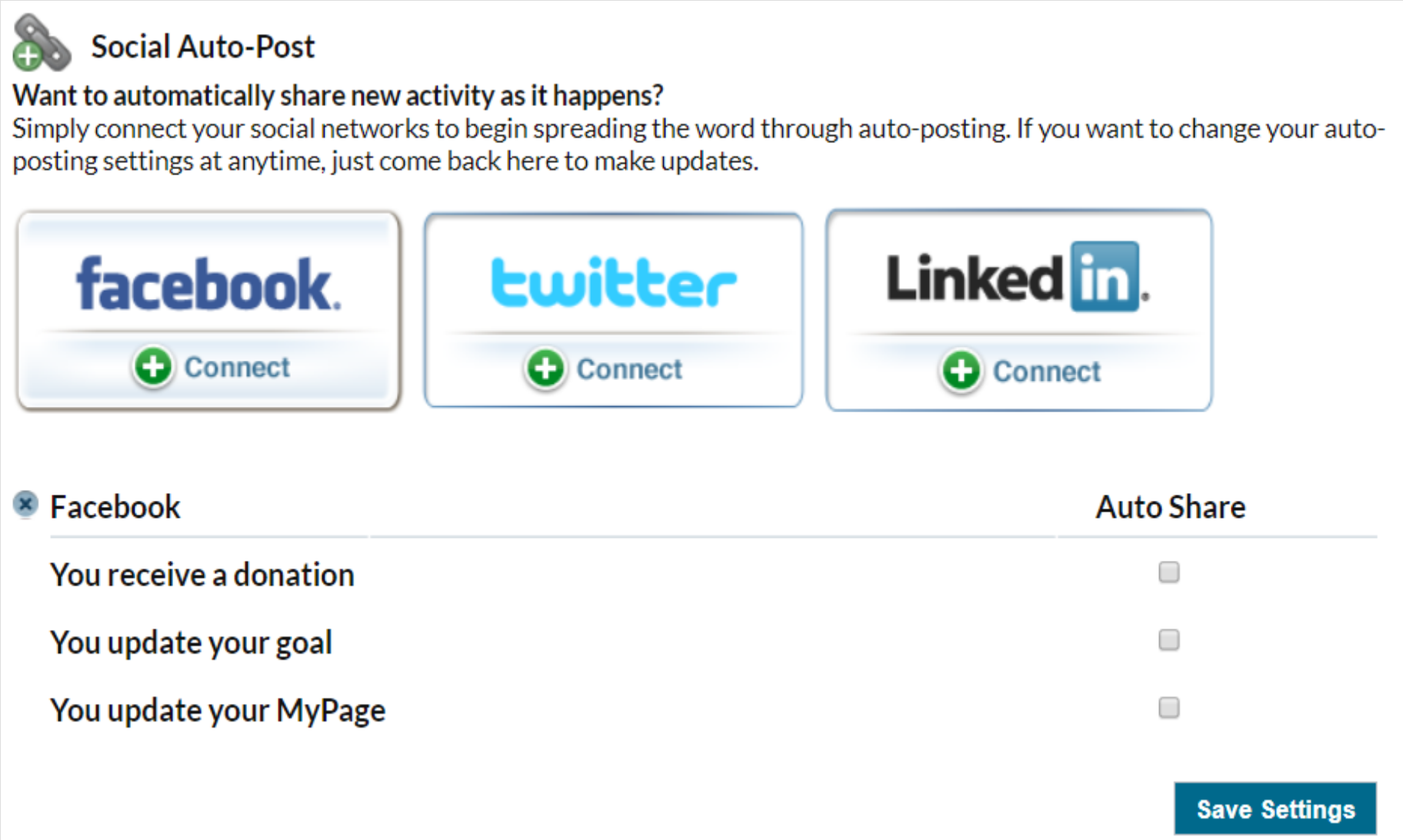
Alternatively you can create your own email message from scratch. If it’s a message you think you’ll re-use you can create your own email template by selecting “Save Template”.

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

Utilizing
Social Media to Fundraise

RallyBound has sections that will allow you to post a message to a social friend and to connect to Facebook, Twitter and/or LinkedIn Accounts so set-up social auto-posts.

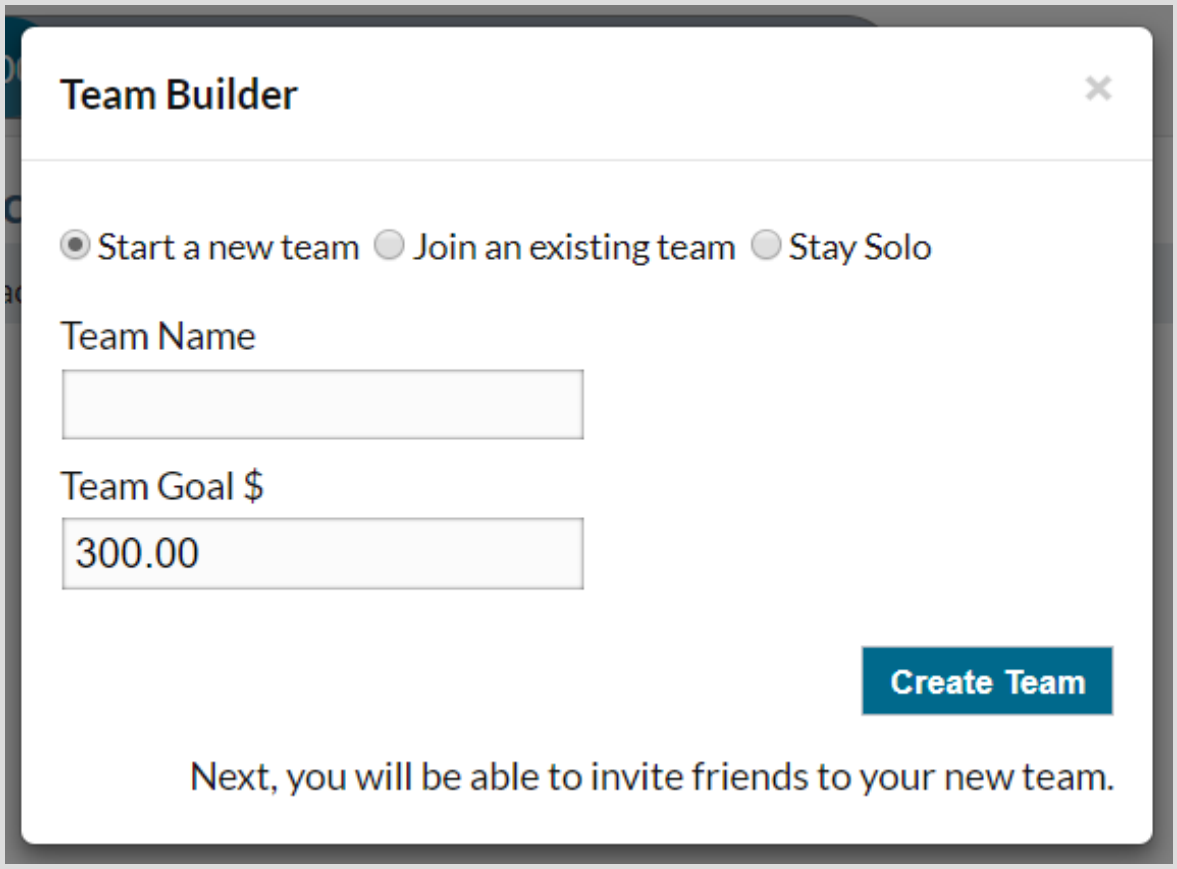
“Promote Via Social Media” allows you to send individual updates, tweets or messages to your network, either through social sites or through email.



Once you have connected your social account you can allow for the non-profit to post to your social sites for various activities you complete.

FUNDRAISER HEADQUARTERS CREATE OR JOIN A TEAM

You will have the option to Create or Join a Team in the registration process. In the instance you want to change your selection you will be able to by selecting “Create or Join a Team“.

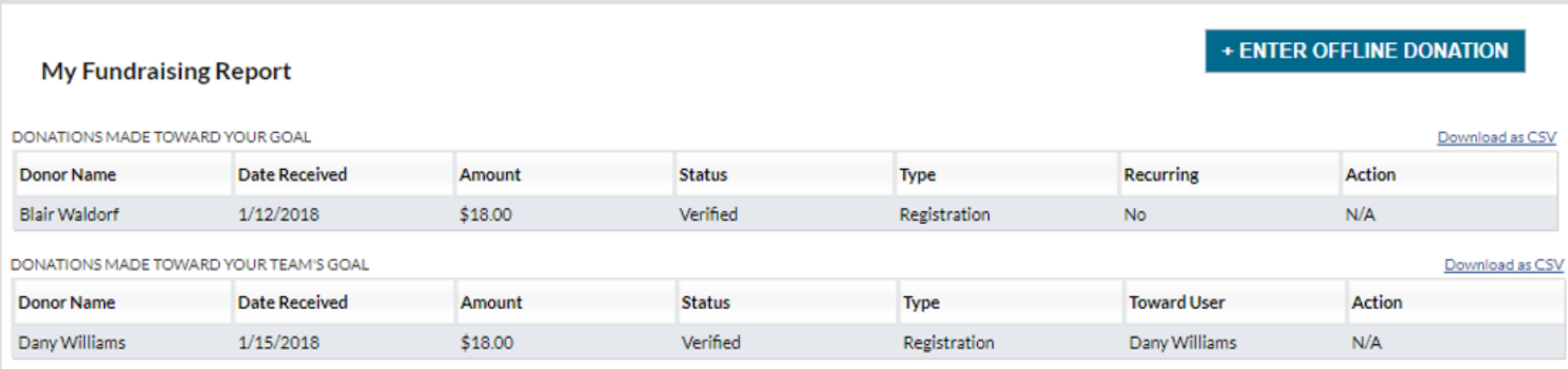


This task will allow you to do the following:

- Join a team
- Create a team
- Leave a team (Fundraise solo)
- Invite others to join your team – additional information available in the appendix.

Fundraising
Team & Individual Reports

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.

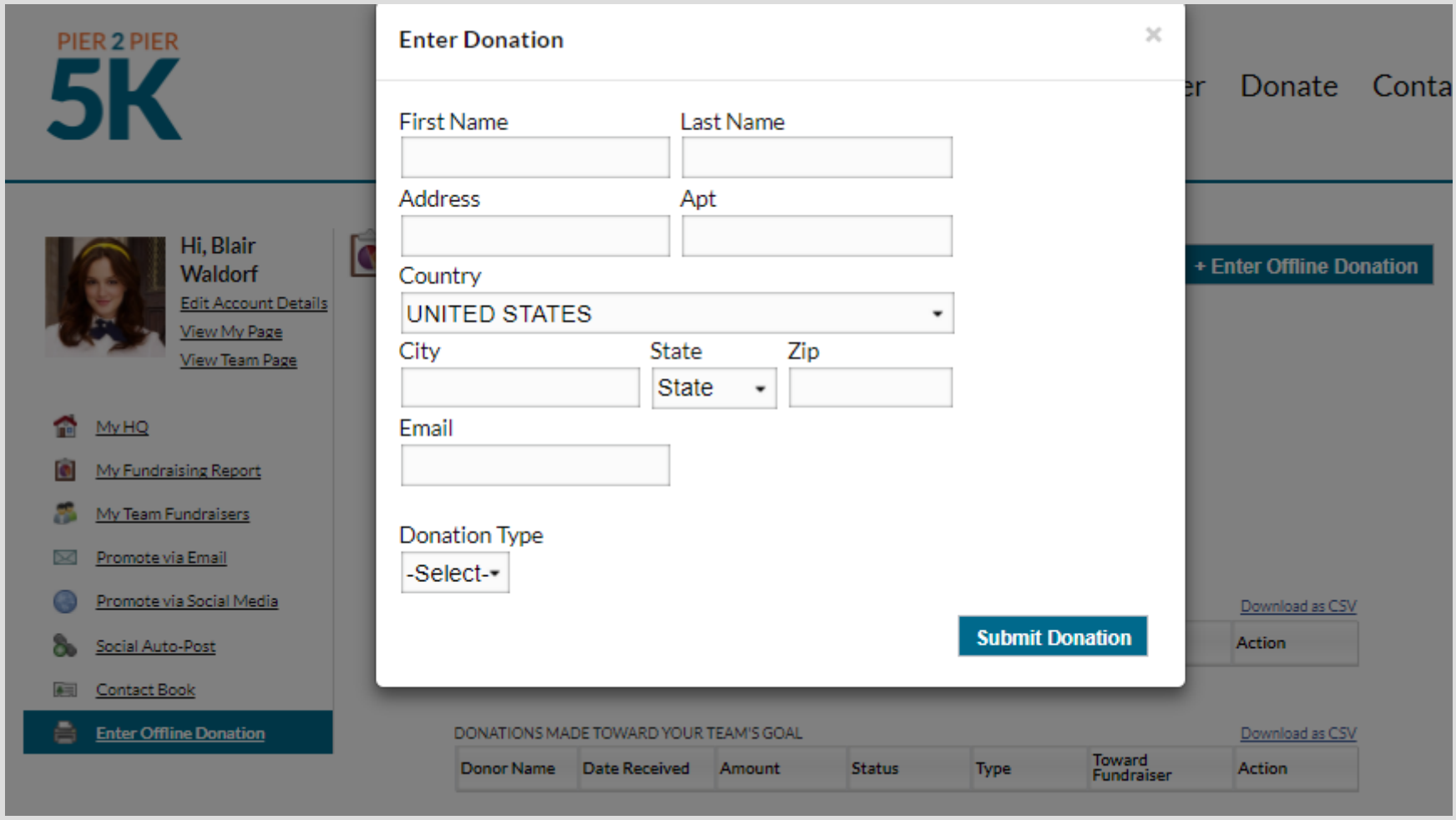


Any report can be downloaded. These are valuable tools, especially if you are participating in an event every year as you can draw on past supporters to help you meet your current goal.

For Team Fundraises you will have the option of seeing activity on your team similar to the example above. For Team Captains this can be an effective tool to help encourage and motivate your team members.

Entering in
Cash or Check Donations

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 “Enter Offline Donation” on the bottom left of your Headquarters, or within your ‘My Fundraising Report” tab.



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.

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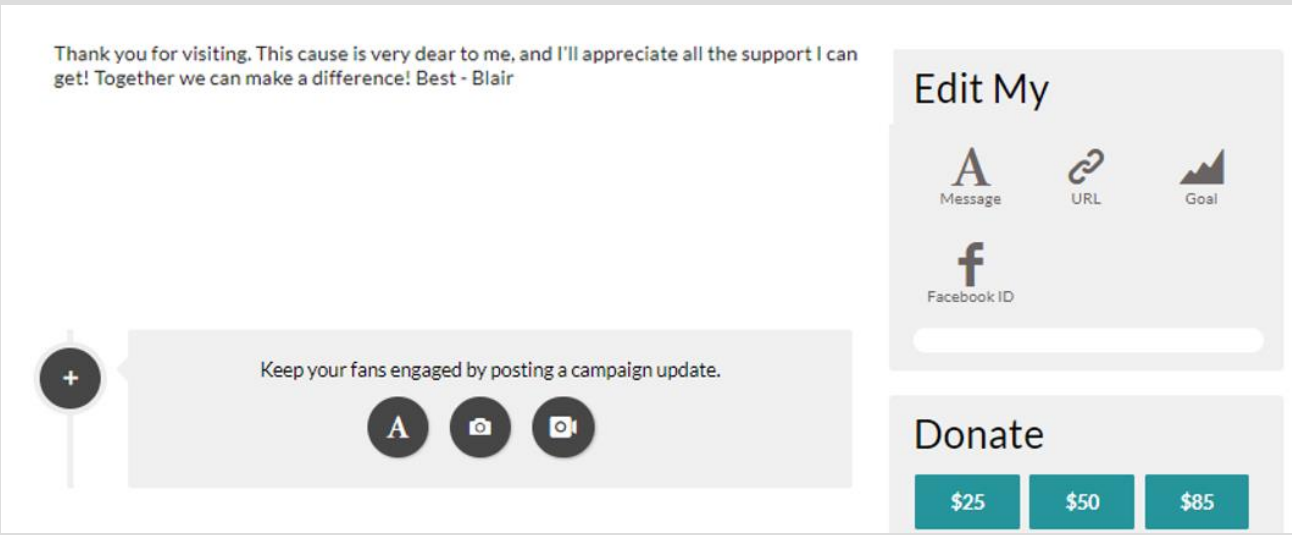

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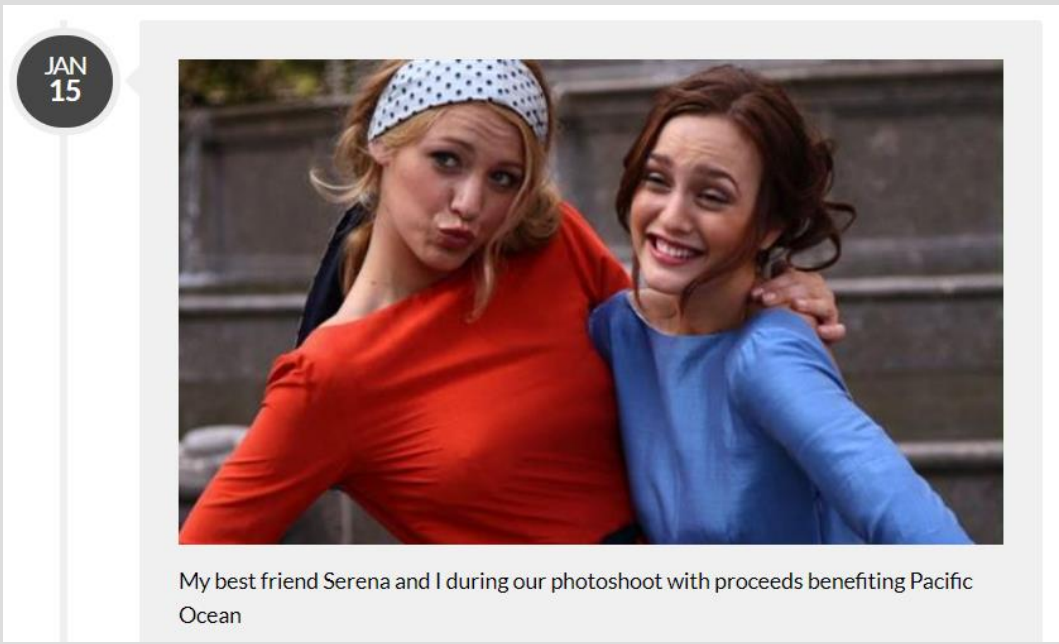

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