

Fundraiser Guidebook



Fundraiser Headquarters

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

The screenshot shows the top navigation bar with the Johns Hopkins Children's Center logo, a search bar, and buttons for REGISTER and DONATE. Below the navigation bar are links for About the Event, Sponsors, Fundraiser Resources, Contact Us, and FAQs. The main content area features a user profile for Chelsea Kling with links to Edit Account Details, View My Page, and View Team Page. A prominent blue banner reads "Get Involved Now! These tools will help you get started." Below this is a campaign progress bar showing \$500.00. A "My Recent Activity" section shows "No activities yet". On the right, a "My Progress" section shows a 100% progress bar and the text "For an Effective Campaign You Should:". A sidebar on the left contains a "My HQ" section with links to My Fundraising Report, My Team Fundraisers, Promote via Email, Promote via Social Media, Social Auto-Post, Contact Book, and Add Offline Donation.

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.

The screenshot shows the user profile page for Chelsea Kling. It features a profile picture, the name "Chelsea Kling", and the email address "ckling1@jhmi.edu". Below the profile information are tabs for PROFILE, MY CAMPAIGNS, and NOTIFICATIONS. The PROFILE tab is selected, and the form fields for First Name (Chelsea), Last Name (Kling), and Email (ckling1@jhmi.edu) are visible.

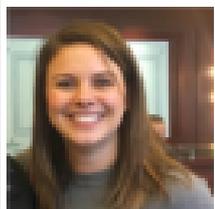
Your Profile will allow you to update personal information, such as name, email address, password and physical address.

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!



Hi, Chelsea
Kling
[Edit Account Details](#)
[View My Page](#)
[View Team Page](#)

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

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

Edit My



Message



URL



Goal



Facebook ID

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

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

Donate

\$25

\$50

\$85

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.

JAN
15



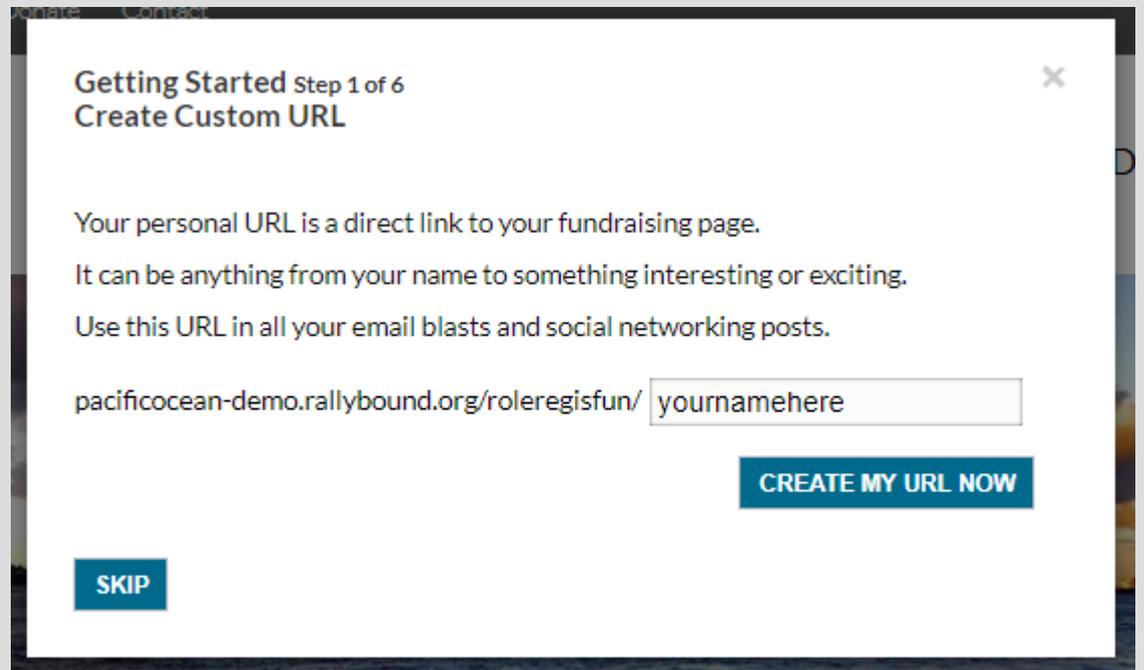
My best friend Serena and I during our photoshoot with proceeds benefiting Pacific Ocean

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.



Getting Started Step 1 of 6
Create Custom URL

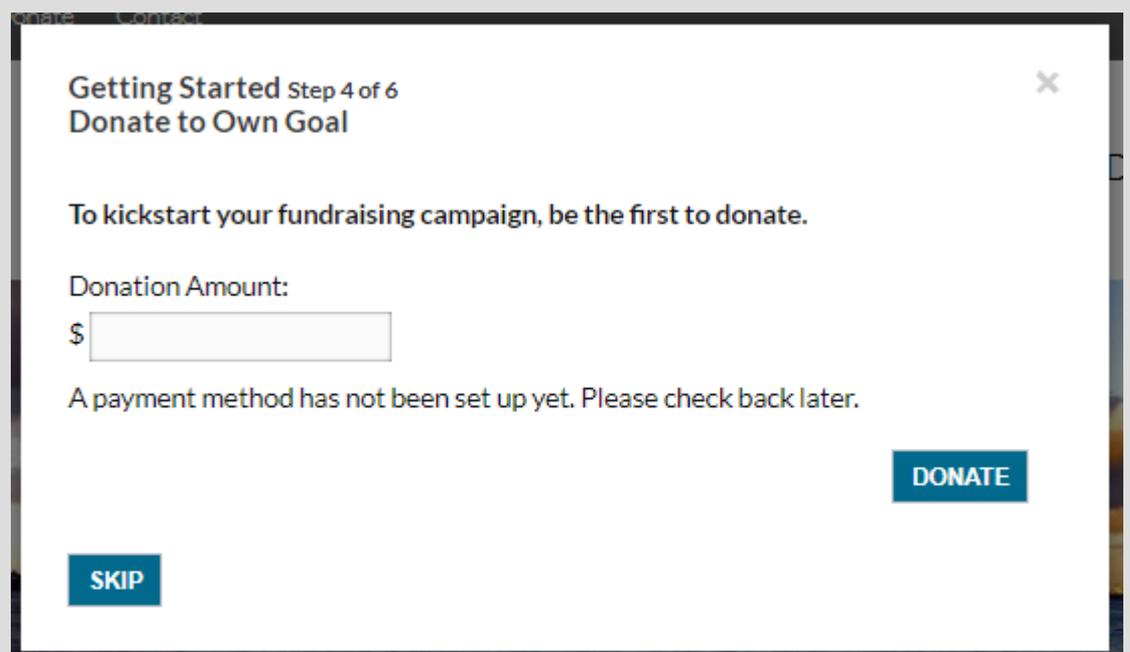
Your personal URL is a direct link to your fundraising page.
It can be anything from your name to something interesting or exciting.
Use this URL in all your email blasts and social networking posts.

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:
\$

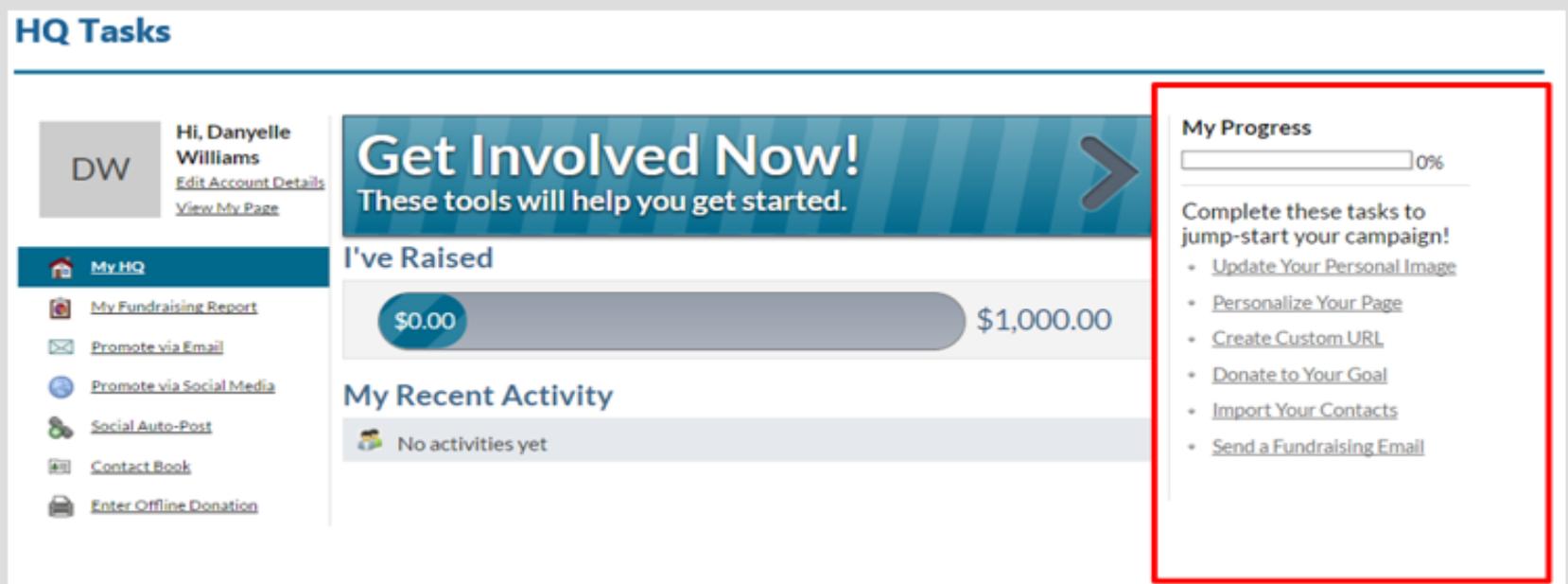
A payment method has not been set up yet. Please check back later.

[DONATE](#)

[SKIP](#)

Fundraiser 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.



The screenshot displays a fundraising dashboard for a user named Danyelle Williams. The dashboard includes a navigation menu on the left with options like 'My Fundraising Report', 'Promote via Email', and 'Social Auto-Post'. The main content area features a 'Get Involved Now!' banner, a progress bar for 'I've Raised' showing \$0.00 towards a \$1,000.00 goal, and a 'My Recent Activity' section. On the right, a 'My Progress' section is highlighted with a red box, listing tasks to complete: 'Update Your Personal Image', 'Personalize Your Page', 'Create Custom URL', 'Donate to Your Goal', 'Import Your Contacts', and 'Send a Fundraising Email'. A progress bar above this list shows 0% completion.

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.

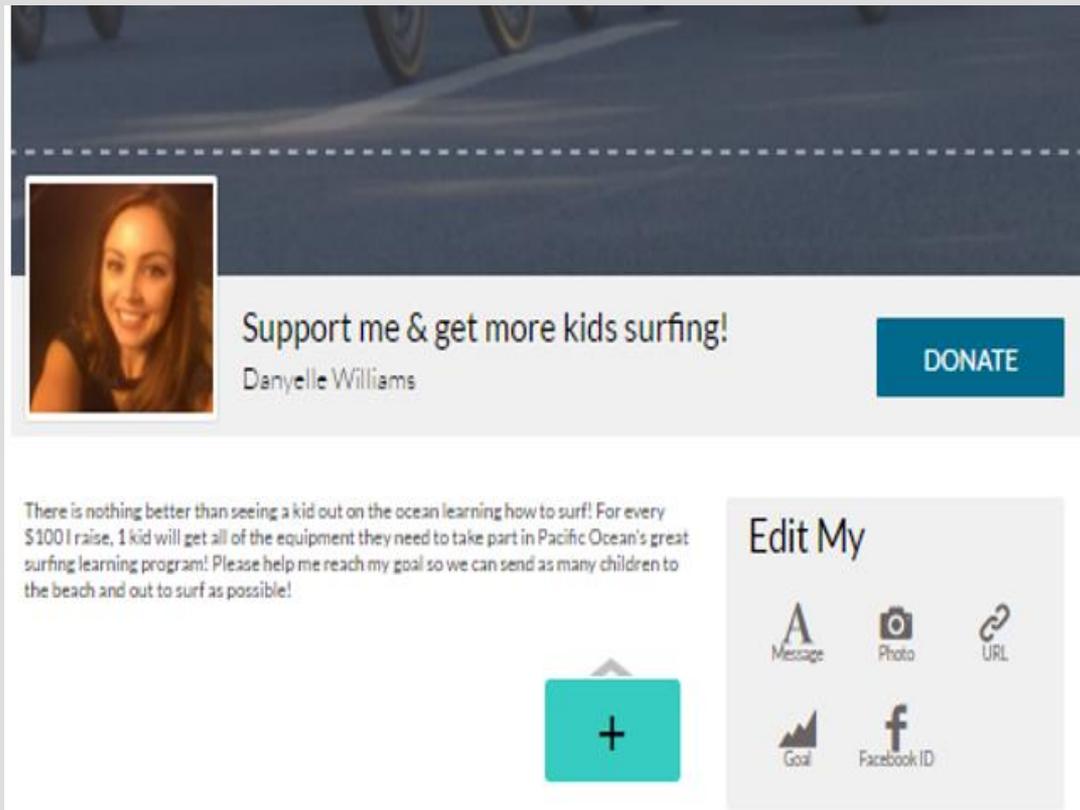
Donate to Own Goal – Lead by example and donate to your cause yourself.

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.

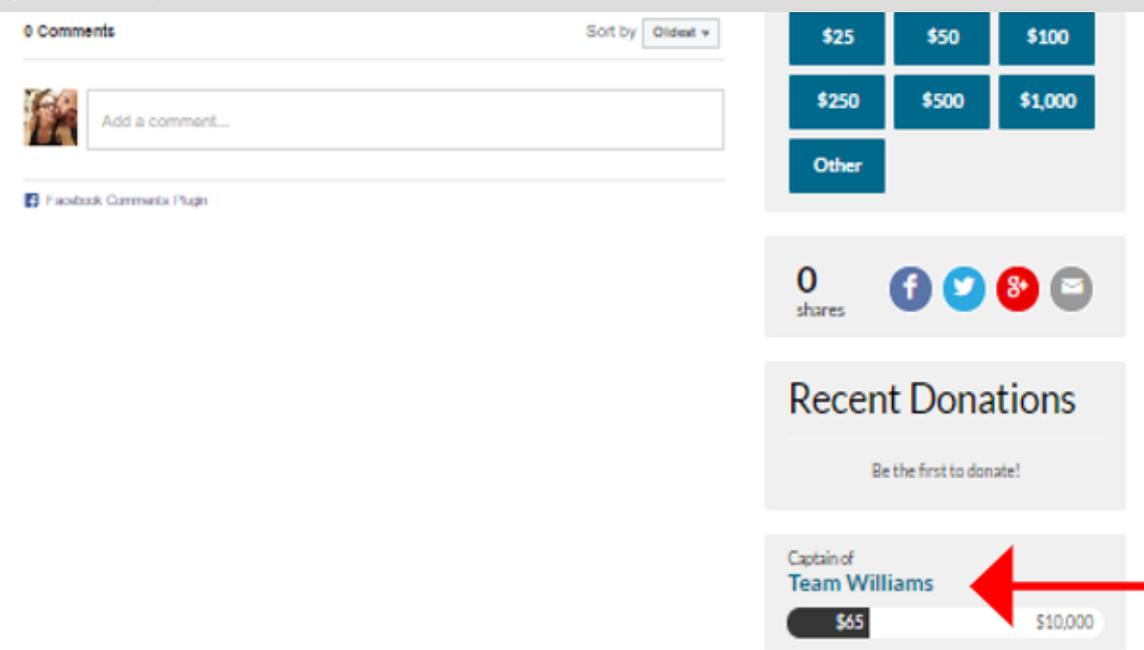
The photo option refers to your profile image.

URL allows you to update your campaign URL.

Goal will allow you to update your fundraising goal.

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

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

Hi, Danyelle Williams
[Edit Account Details](#)
[View My Page](#)
[View Team Page](#)

[Promote: Social](#) [Promote: Email](#) [Contact Book](#)

[+ Import Contacts](#) [Actions](#) [Download as CSV](#)

| 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. | | | | |

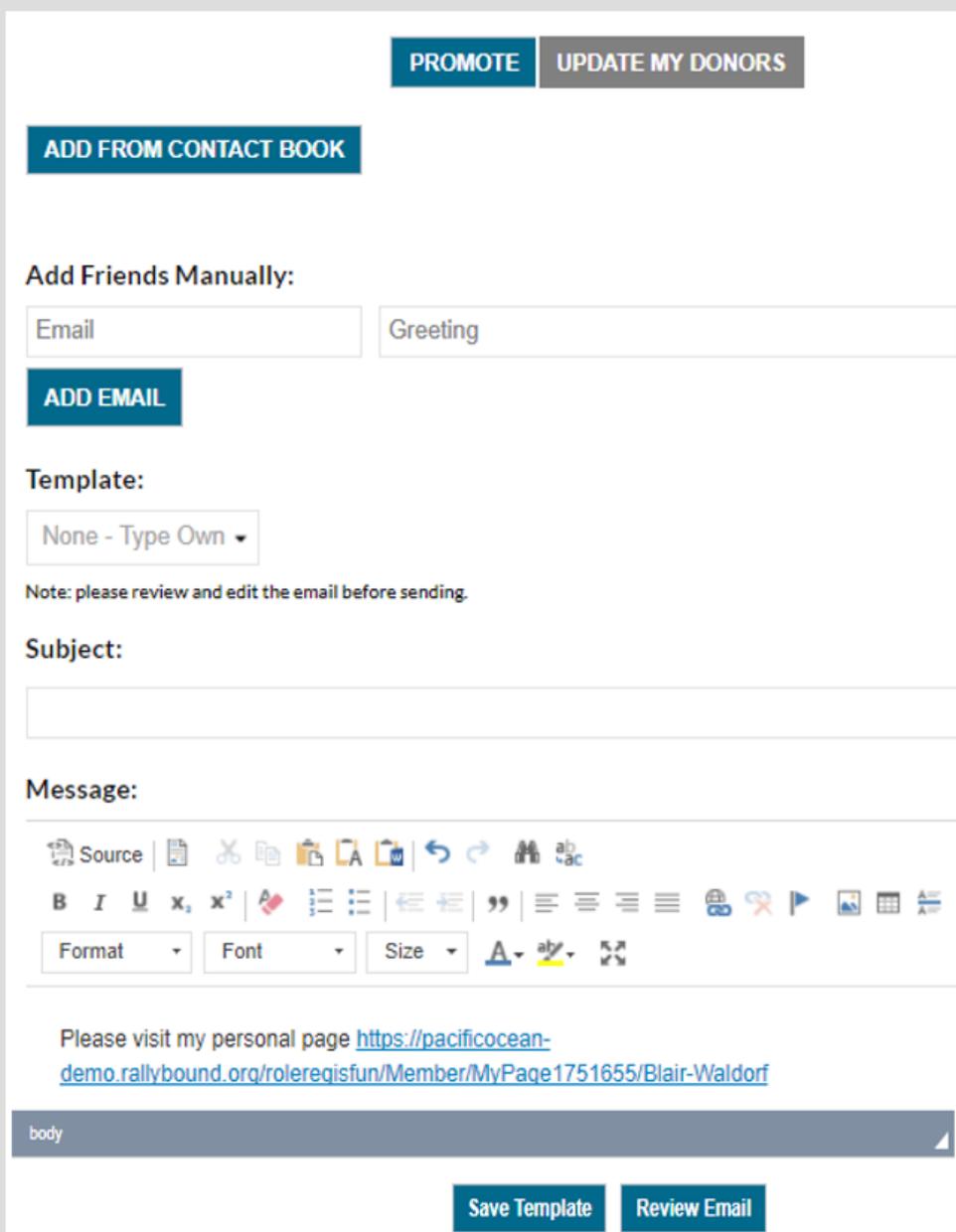
Selecting the task to “Import Your Contacts” will take you to your contact book.

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.



The screenshot shows the email creation interface in RallyBound. At the top, there are two buttons: "PROMOTE" (in a blue box) and "UPDATE MY DONORS" (in a grey box). Below these is a blue button labeled "ADD FROM CONTACT BOOK". Underneath, the "Add Friends Manually:" section contains two input fields: "Email" and "Greeting". A blue "ADD EMAIL" button is positioned below these fields. The "Template:" section features a dropdown menu currently set to "None - Type Own". A note below the dropdown reads: "Note: please review and edit the email before sending." The "Subject:" section has an empty text input field. The "Message:" section includes a rich text editor with a toolbar containing icons for source, copy, paste, undo, redo, bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, indent, outdent, quote, link, unlink, image, video, and table. Below the toolbar are dropdown menus for "Format", "Font", and "Size", along with color selection tools. The message body contains the text: "Please visit my personal page <https://pacificocean-demo.rallybound.org/rolereqisfun/Member/MyPage1751655/Blair-Waldorf>". At the bottom of the interface, there are two buttons: "Save Template" (in a blue box) and "Review Email" (in a grey box).

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.

 **Social Auto-Post**

Want to automatically share new activity as it happens?
Simply connect your social networks to begin spreading the word through auto-posting. If you want to change your auto-posting settings at anytime, just come back here to make updates.










 **Facebook** Auto Share

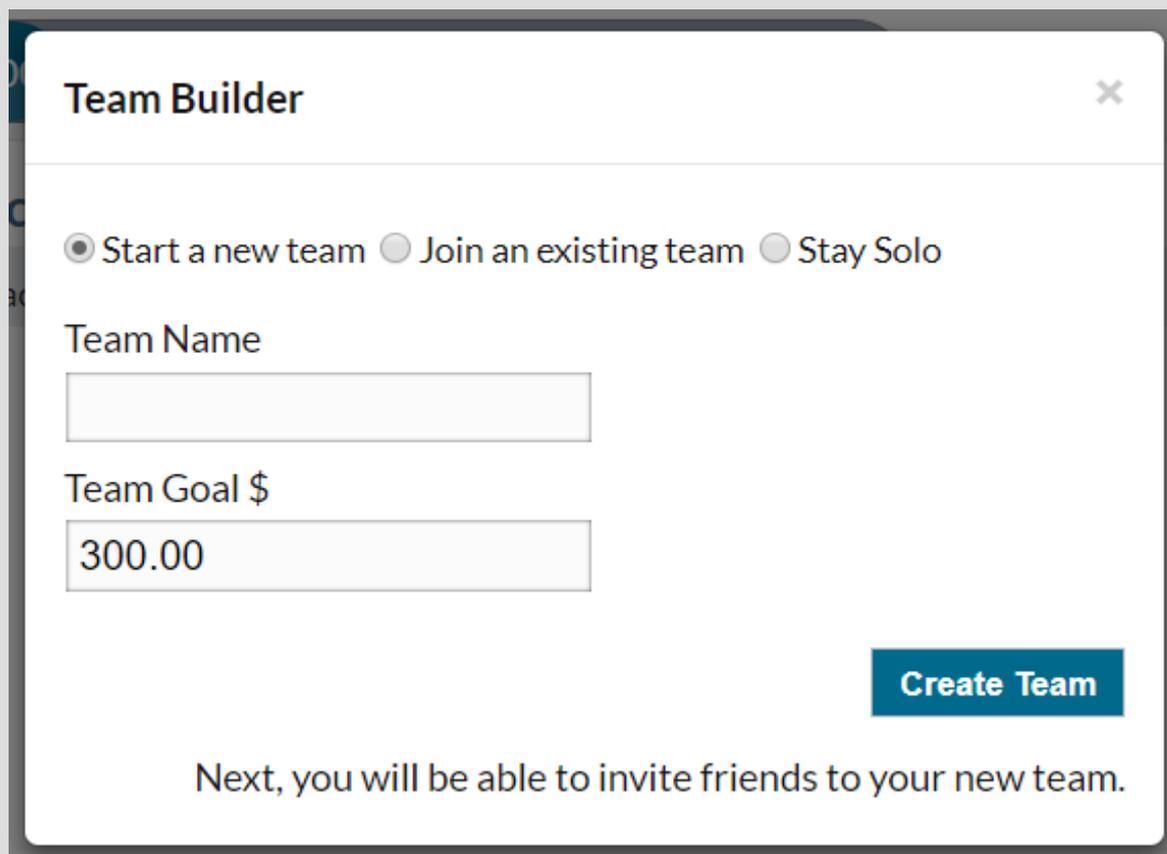
| | |
|------------------------|--------------------------|
| You receive a donation | <input type="checkbox"/> |
| You update your goal | <input type="checkbox"/> |
| You update your MyPage | <input type="checkbox"/> |

[Save Settings](#)

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”.



The screenshot shows a 'Team Builder' window with a close button (X) in the top right corner. Below the title bar, there are three radio button options: 'Start a new team' (selected), 'Join an existing team', and 'Stay Solo'. Underneath, there is a 'Team Name' label followed by an empty text input field. Below that is a 'Team Goal \$' label followed by a text input field containing the value '300.00'. A blue button labeled 'Create Team' is positioned in the bottom right area. At the bottom of the window, there is a line of text: 'Next, you will be able to invite friends to your new 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 access reports on your personal fundraising; if you are part of a team you can see activity on your team members fundraising activity.

[+ ENTER OFFLINE DONATION](#)

My Fundraising Report

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.



Hi, Blair Waldorf
[Edit Account Details](#)
[View My Page](#)
[View Team Page](#)

-  [My HQ](#)
-  [My Fundraising Report](#)
-  [My Team Fundraisers](#)
-  [My Account Email](#)

My Team Fundraisers

| | Raised to date | Personal Goal |
|---|----------------|---------------|
|  Blair Waldorf | \$0.00 | \$150.00 |

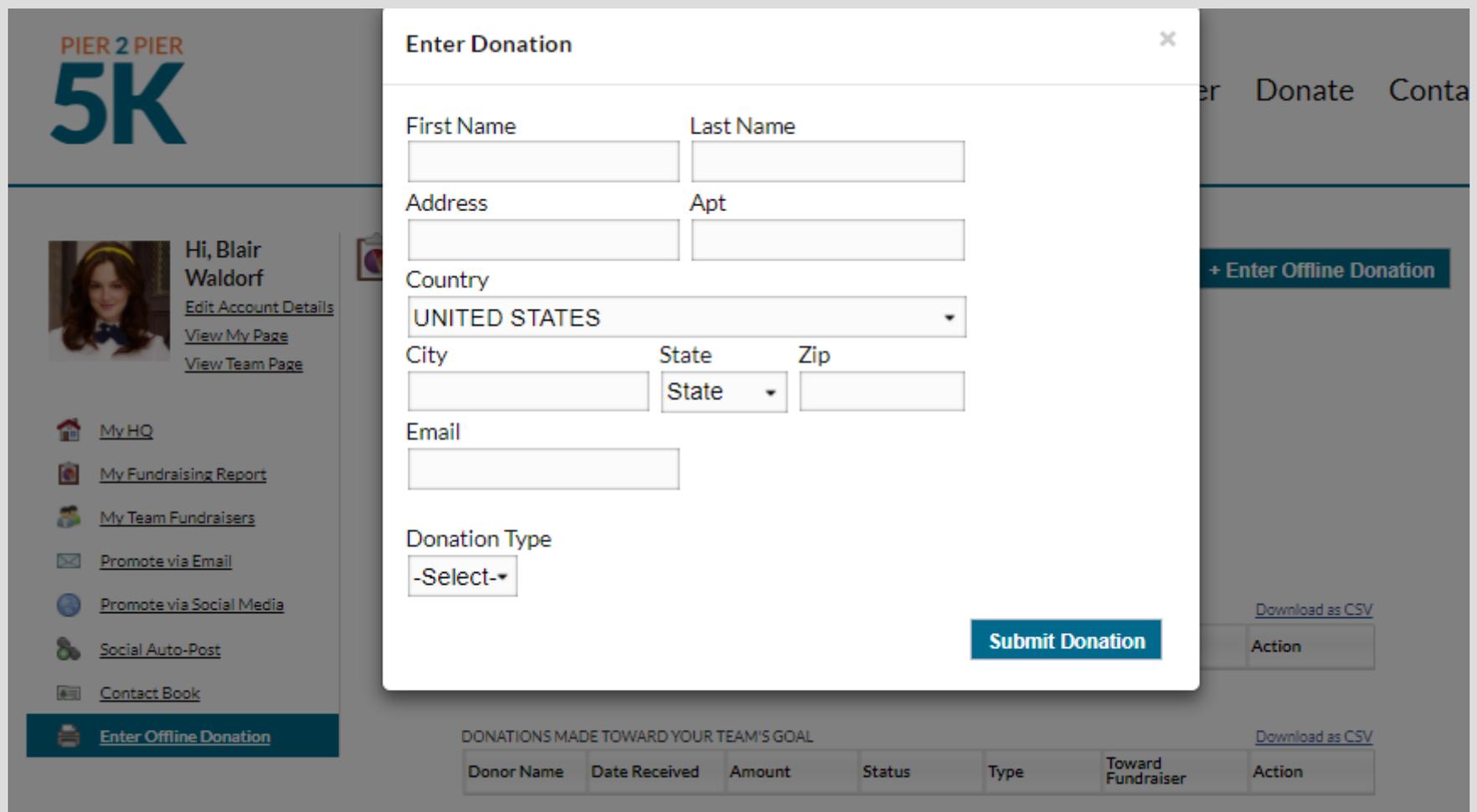
Team Information

| | |
|----------------------------|--------------|
| Team Name: | Gossip Girls |
| Total Fundraisers: | 1 |
| Total Pending Fundraisers: | 0 |
| Team Goal: | \$300.00 |
| Amount Raised: | \$0.00 |

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.



The screenshot shows a web interface for a fundraising event titled "PIER 2 PIER 5K". A user profile for Blair Waldorf is visible on the left. The main content area is a modal window titled "Enter Donation" with the following fields:

- First Name (text input)
- Last Name (text input)
- Address (text input)
- Apt (text input)
- Country (dropdown menu, currently showing "UNITED STATES")
- City (text input)
- State (dropdown menu, currently showing "State")
- Zip (text input)
- Email (text input)
- Donation Type (dropdown menu, currently showing "-Select-")

A "Submit Donation" button is located at the bottom right of the modal. Below the modal, a table header is visible with columns: Donor Name, Date Received, Amount, Status, Type, Toward Fundraiser, and Action. A "Download as CSV" link is also present.

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.

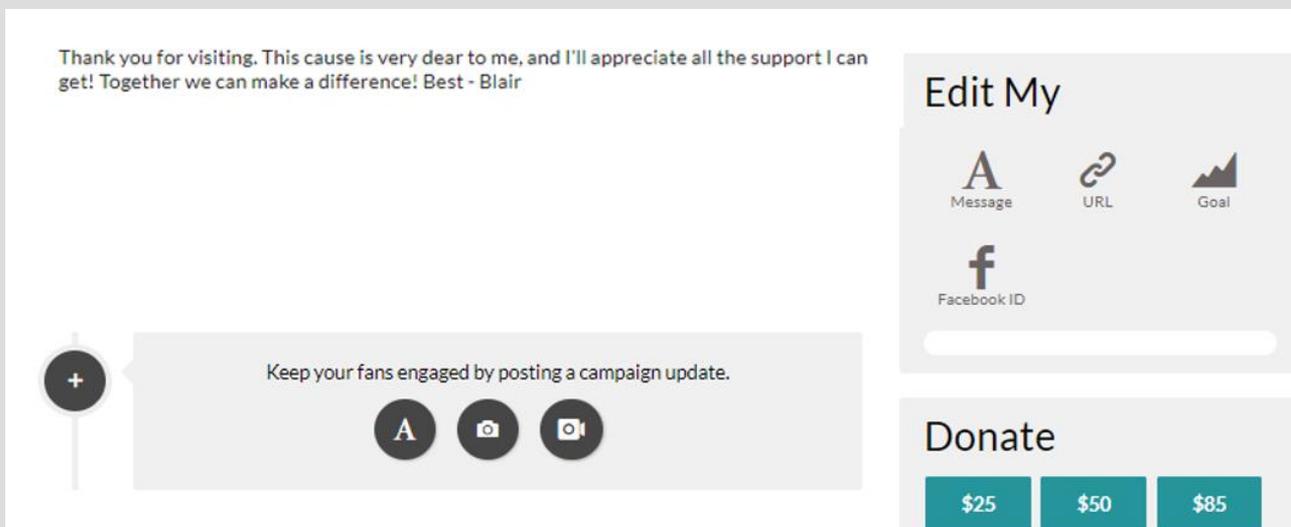
If a donation is entered in error, you will have the ability to delete if it is in an unverified state.

Personalize your Fundraiser 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!



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.

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