Introduction: Getting Started

Congratulations on starting your fundraising campaign for The Weekend to Conquer Cancer!
Fundraising is a truly rewarding experience. But how should you get started?

Logging in to your Participant Centre portal is the start of your journey and where you can personalize your campaign, spread it out to the world and collect vital donations.

This booklet helps you get the most out of your Participant Centre and maximize your fundraising efforts. It contains helpful step-by-step instructions and Frequently Asked Questions (FAQs) organized by sections to help you find the specific information you need.

My Page

Personalizing My Page

Your page is your online presence and where visitors will come to make a donation. Personalize your page to showcase why the cause is important to you and appeal to donors by adding images and videos, your story, a personal URL, and fundraising goal.

To start personalizing, go to **My Page** and click the Edit Page button or simply hover over the preview of your page and click to edit.

The Weekend to Conquer Cancer has set you up with some default content, like a default image and key messaging for you to draw inspiration from.

Edit your title

- In the Title field, enter a brief title to introduce your page.

Update your fundraising goal

- If you decide to change your goal, enter the new amount in the Fundraising Goal field.
- Click Save at the bottom of the page and the fundraising goal and percentage raised will re-calculate in real-time.

What's your personal URL?

- A link is automatically generated by the system for your page. You can use this link to drive people to your page to donate.
- Customizing the name of the URL makes it more personal and shareable.
- Copy and paste to share anywhere.

Photos and story

Personal media and a story that connects you to the cause make a tremendous impact on your fundraising.

Add photos to your page

- Under Images, click Add Media.
- Click to upload an image and choose a photo from your device. *Note: For best quality, choose a photo that is at least 320 pixels (h) by 260 pixels (w).*
- Zoom or rotate your image for best fit.
- Click Save.

Add video to your page

- Under Images, click Add Media.
- Change Media type to Video.
- Copy the link of a YouTube video and paste into YouTube link box.
- A preview of your YouTube video will appear in the frame above.
- Click Save.

Edit or re-order your media

- The first image will be your main image when visitors reach your page.
- To re-order images, click a thumbnail and drag/drop it into place.
- Delete photos by hovering over a thumbnail and clicking the X icon in the top right.
- Click Save in the bottom right-hand corner.

Add a story of your own

- Enter a blurb about why you are fundraising into the My story panel, or copy and paste text from another document. Note: Formatting from other documents will be removed.
- Use the tools to edit and format your page as you would in a word processor using text styles, lists, titles, links and embedded images.
- If you make a mistake, highlight the text and click the eraser icon to clean the changes.
- Click Save.

Team

The Team section allows you to join a team, see team progress and email team members to stay connected & motivate your team! Team Captains can also edit their Team's Page from here. Note: Some campaigns do not allow for team registration.

Team Page:

If you are a Team Captain, you have the ability to personalize your Team's page. Like your Page, this is an opportunity to tell visitors about your team, and why you're fundraising with images and videos, a team story, a team URL, and your overall fundraising goal. Click the Edit Page button or simply hover over the preview of your page to get started.

Edit the team title

- In the Title field, enter a brief title to introduce your page.

Update team fundraising goal

- If you decide to change the team's overall goal, enter the new amount in the Fundraising Goal field.
- Click Save at the bottom of the page and the fundraising goal and percentage raised will re-calculate in real-time.

What's your team URL?

- A link is automatically generated by the system for your page. You can use this link to drive people to your page to donate.
- Customizing the name of the URL makes it more personal and shareable.
- Copy and paste to share anywhere.

Add photos to your team page

- Under Images, click Add Media.
- Click to upload an image and choose a photo from your device. *Note: For best quality, choose a photo that is at least 320 pixels (h) by 260 pixels (w).*
- Zoom or rotate your image for best fit.
- Click Save.

Add video to your team page

- Under Images, click Add Media.
- Change Media type to Video.
- Copy the link of a YouTube video and paste into YouTube link box.
- A preview of your YouTube video will appear in the frame above.
- Click Save.

Edit or re-order media

- The first image will be your main image when visitors reach your page.
- To re-order images, click a thumbnail and drag/drop it into place.
- Delete photos by hovering over a thumbnail and clicking the X icon in the top right.
- Click Save in the bottom right-hand corner.

Add a story about the team

- Enter a blurb about why your group is fundraising into the Team story panel, or copy and paste text from another document. Note: Formatting from other documents will be removed.
- Use the tools to edit and format your page as you would in a word processor using text styles, lists, titles, links and embedded images.
- If you make a mistake, highlight the text and click the eraser icon to clean the changes.

- Click Save.

Password protect your team

- Enter a password that will be required when others try to join. Be careful where and to whom you share your password!

Donation History

Donation History summarizes gifts received to date. You can see who has donated and track who you've personally thanked to ensure the donors feel appreciated. Team Captains also have the ability to view and thank donors to who have given directly to the Team.

How do I thank donors?

1. From your list, click the checkbox next to each donor you wish to thank. You may select one or many donors to thank in a single email. If you can't find a donor, use the "Search" box to type their name directly or click the Name, Amount or Date column headers to re-sort your list.
2. The number of donors you've selected will automatically in the toolbar above where the envelope icons appears. Choose the option to Email selected.
3. The contacts you chose will be available as recipients for you to send a personal thank you email to them. We recommend using the Thank You template made available to you!

What about donors you've already thanked?

After you've thanked a donor by email, the toggle in the Thanked column will automatically change to "Yes". The toggle can be adjusted manually by for each of your donors as necessary. If you've thanked a donor outside of your Participant Centre (let's say by text on in-person), you can manually switch them by changing them to Yes. Doing so will automatically consider them as having been Thanked and exclude from any filters for Unthanked donors.

How do I reissue a tax receipt?

1. Confirm that the Donor's e-mail address is correct (if it is not correct the Donor will need to contact the Event Administrator whose contact information can be found on the Contact Us page of the main Event Web site). Note: The Donor's e-mail address reflects the e-mail address entered by the Donor at time of donation, not what is necessarily listed in your Address Book. Updating their e-mail in your Address Book will not modify where their tax receipt is sent (as indicated in Donation History).
2. Click the Re-issue link beside the Donor's name.
3. A Tax Receipt will automatically be sent to the Donor's e-mail address listed in Donation History. Be sure to remind the Donor to check their junk mail box, as the Tax Receipt will be sent from the Organization's e-mail address, not your e-mail.

Note: Tax receipting must be enabled by the organization for this functionality.

How will I know if a donor left me a personal message?

If a Donor included a personal message to you when they donated a **Message** link will appear in the row for that individual. Click to view the message they've left you.

Follow Ups

In **Follow-ups,** track the effectiveness of your emails by seeing who opened or viewed your email or donated to you. This visibility allows you to tailor your messages for new contacts, contacts you've already e-mailed and need a reminder or thank donors. **Actions**, **Filters** and **Status** flags help to keep you up to date and identify appropriate next steps.

What are Quick Actions?

Our research has identified three key segments to improve your fundraising:

1. Donors you haven't thanked yet
2. Contacts you've emailed but haven't donated
3. New contacts who haven't received an email yet

To make things easy for you, we've created handy Quick Actions that will show you how many contacts you have in each category, and dynamically filter so that you can start an email to those contacts.

How do I filter my email activity?

Filters are an efficient way to view how contacts are responding to your campaign and segment your list accordingly to reach out and/or steward your contacts. Filter contacts by selecting the Type of contacts that you want to see in the Filter by pull down menu, and the system will automatically find contacts who fall into this category. There are a various filter types to support your campaign:

- All Contacts: All of your contacts
- Not Emailed: New contacts who you have not yet emailed
- Not Donated (emailed): Contacts who you have emailed, but have not yet donated
- Not Thanked: Donors who you have not yet thanked
- Thanked: Thanked donors
- Sent Email: Contacts who you have emailed, but have not opened the email or donated
- Opened Email: Contacts who have opened one of your emails
- Viewed Page: Contacts who you have emailed and viewed you page, but not donated
- All Donors: All of you donors – thanked and not thanked

How do I send a follow up with filtered contacts?

1. Click Filter by pull-down and choose the Type you'd like to see.
2. Click E-mail all in filter.
3. You will be re-directed to the E-mail section. All of the contacts you filtered for will appear as Recipients. You may add or remove contacts from the Recipients bar before sending your e-mail.
4. Choose a template and/or compose your e-mail.
5. Send.

You might also opt to follow up with one or many filtered contacts:

1. Click the Filter by pull-down and choose a Type.
2. Click the checkbox next to each individual donor you'd like to contact. You may choose more than one.
3. Select Email selected contact(s).
4. You will be re-directed to the Email section where you can choose a template and/or compose an email to the contacts you selected. You may add or remove contacts from the Recipients bar.

Why are there contacts I haven't added?

Donors who have contributed to your campaign and were not originally among your contacts are automatically added to the My Contacts and Follow-ups sections so that all donor information is kept together. If you're part of a team, Team Members are also included as they join for communication across the team.

Send Emails

Emailers raise more money! Send messages to potential Donors, Sponsors, and Teammates and make them aware of the good you're doing. A number of sample e-mails are available to use throughout each step of your campaign or you can create your own e-mail message using a blank e-mail templates. Track and monitor responses in Follow-Up section to stay on track of how your campaign is doing.

Create and send an E-mail Message (from the E-mail Centre):

1. Select a sample Template E-mail.
2. Enter or select the contacts that you would like to e-mail. Contacts can be added in a few ways:
   - If the contact has already been added to your contact list, type their name or e-mail address and the system will automatically recognize them.
   - If the contact does not already exist in your list, you can type their e-mail address on the fly to send an email on the fly.
   - Click the "+" icon to open up your Contact List. Start populating your Address book according.
1. In the Subject field, type the subject line that you would like to appear in your e-mail.
2. In the Body field type your message. If you selected a Sample E-mail the default message will appear in the Body of the message. Use the tools at the top of the edit window to edit and format your message as you would within the Microsoft Word program.
   - Note: Your message will automatically contain "merge fields" which will dynamically populate with contact or fundraising information when sent. You can identify these as text wrapped with [% and %].
3. The organization you're supporting may have added to a pre-defined message to the bottom of your email. Click to preview it how you e-mail will look to the recipient.
4. Click Send E-mail Now to send the e-mail to the contacts that you selected. You will receive a confirmation message on the next page if your e-mail was sent successfully or further instructions if something needs to be adjusted before re-sending.

Save a Custom Template for Future Use:

1. When you are creating your message, click the Save E-mail Message button at the bottom of the page.
2. A Save As field will appear near the bottom of the page. Name the file.
3. Click Save E-mail Message.
4. The message will appear in your Templates under a Saved Templates section with the name you have given it. Saved Templates can be accessed for future emails and/or edited at any time. When editing a custom template, click Save to ensure your changes are saved for next time.

Contacts

Contacts allows you to build an address book of potential donors by adding or import contacts from other e-mail programs and edit contact information. Any Donors who have sponsored you and were not originally in your address book will be automatically added to your Address Book. Don't worry, your contacts are private to you only.

How to get contacts into your address book?

There are two ways to add contacts to your address book:

- Import: Get contacts directly from another email or social platform (recommended)
- Add a Contact: type in First Name, Last Name and email Address individually

Importing contacts

Your Participant Centre uses a technology called Cloudsponge to import contacts directly from your email and/or social accounts.

1. Click the Import contacts button at the top of your My Contacts page
2. Select the program or service that you use to keep your contacts.
4. Login to your account.

5. Select the contacts that you want to add.
6. Select Next.
7. Select Done.

Manually add a contact:
If you prefer to manually contacts, choose the "Add Contact" button and fill in details for each contact using the form provided. First Name, Last Name and Email are required.

Send e-mail to contacts in my Address Book?
To send an e-mail to all of your contacts, click "E-mail All Contacts" to send an e-mail to everyone in your address book. Or, to e-mail a subset of contacts:

1. Click the checkbox beside the Contact's Name. Repeat until you have selected all the contacts you wish to message.
2. If you make a mistake, choose "Clear" to start again or uncheck the erroneous contact.
3. Click E-mail Filter Contacts (you will be re-directed to the Send E-mail page).
4. Select a Sample Template.
5. Modify the message.
6. Click Send E-mail Now or Save E-mail for future use.

How do I edit a contact?

1. Search for the contact to edit by Name or e-mail.
2. Choose the pencil icon in the corresponding Action column for that contact in the result.
3. To edit, simply fill in the new information in the Edit Contact form and click Save.

How do I delete a contact?
If you wish to remove a contact, click the trash icon next to their name. Should you wish to delete more than one contact at once, click the checkbox next to each Contact's Name you wish to delete. Click the "Delete" option that appears in the grey toolbar above displaying the number of contacts you've selected to delete.

Get Social

One of the best ways to spread the word about your campaign is to tell your friends on social media! Create a post that tells people about why you're fundraising and links back to your page so that people can donate.

How do I create a social post?

There are currently three main social networks from which you can create a post: Facebook, Twitter and LinkedIn.

1. Click the button for the channel you'd like to share from.
2. Login to your account
3. In the next pop-up that appears, write your post in the text box provided. Your page link is automatically included in the post. Tip: Try to be concise! Some networks will limit the number of characters.
4. Click the "Post to" button at the bottom of your post.

How do I get my photo to appear?

The main photo on your Page should appear when you share to Facebook or LinkedIn (Note: Twitter does automatically support the ability for images from your page). Sometimes these networks can be slow to crawl your page with new information if you've recently changed it.