National Multiple Sclerosis Society

Fundraising Portal Guide

Fundraising Portal

In this guide you can learn more about areas in your Fundraiser Portal, click the links below or continue reading to get started.

The Fundraiser Portal serves to guide you through the fundraising process, whether you are a first-time fundraiser in an event or a longtime supporter. The Fundraiser Portal encourages you to take specific actions that will have a positive impact on The National Multiple Sclerosis Society's online fundraising efforts.

If you register online for events, create personal campaigns, or buy tickets, you are required to create an account during the registration or ticket purchase process. Donors have the option to create an account after donating, but this is not required. Once an account is created, you will have access to the Fundraiser Portal.

The Fundraiser Portal has many tools to motivate you to take more action, raise more money online, and spread the word for The National MS Society's mission to end MS. You can invite others to support your fundraising efforts, track your fundraising progress, update account information, and more.

Fundraising Portal – Your Page

Overview

The Your Page tab is how you can access your personal fundraising page. You can easily make updates to your fundraising page such as updating your profile image, adding content to Your Story, and updating settings for your personal fundraising page.

Updating Your Profile Image and / or Banner Image

1. Log in to your **Fundraiser Portal**.
2. Select **Your Page**.
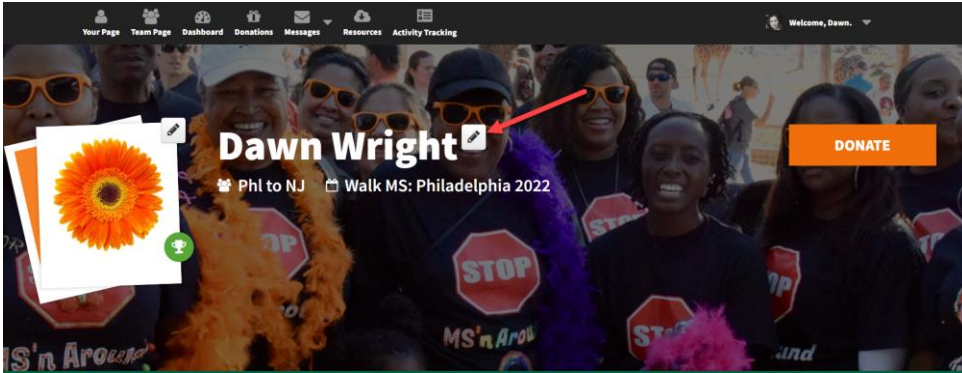3. Select the **Edit** Icon next to your Profile Image.
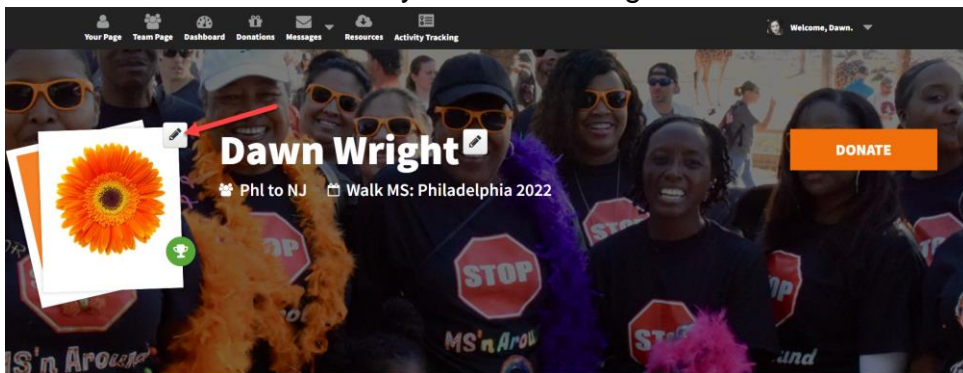
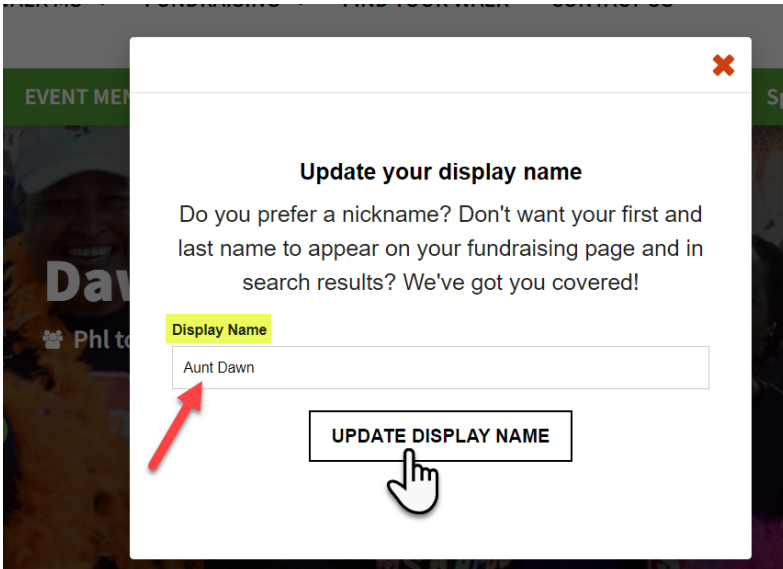4. Choose the image you want to update, Account Photo or Banner Image
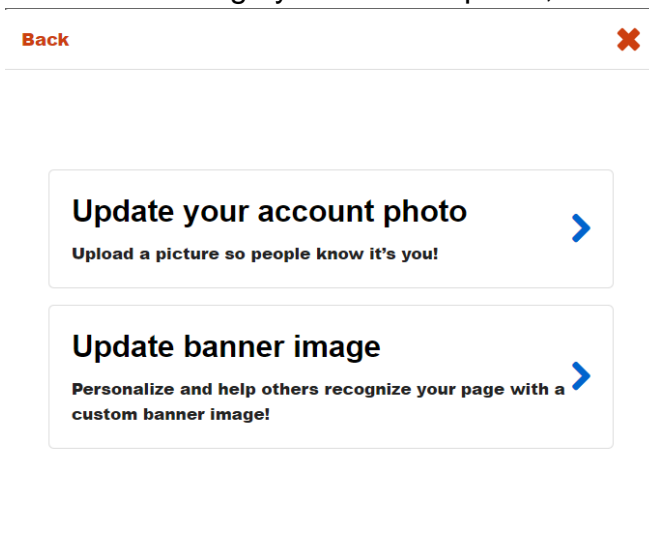
5. Select **Upload an Image**.
6. Select your image from your device.
7. Resize or rotate the image if needed.
8. Select **Save**.

Updating Your Display Name

1. Log in to your **Fundraiser Portal**.
2. Select **Your Page**.
3. Select the **Edit Icon** next to your name.

4. Enter your **Display Name,** then click Update Display Name.

Updating Your Fundraising Goal

1. Log in to your **Fundraiser Portal.**
2. Select **Your Page**.
3. Select the **Edit** Icon next to your **Fundraising Goal**.

4. Enter your new **Fundraising Goal.**
5. Select **Update Goal.**

Milestones & Incentives

Milestones and Incentives are two fundraising tools in the Fundraising Portal that you can use to encourage donors to donate. Incentives allow 1 or more donor(s) to donate a specific amount in exchange for an incentive, while Milestones are markers you can create on your fundraising thermometer to encourage donors to help you reach your fundraising goal.

Creating Milestones

1. Log in to your **Fundraiser Portal.**
2. Select **Your Page**.
3. Select **Add a Milestone**.
4. Enter Milestone amount and description.
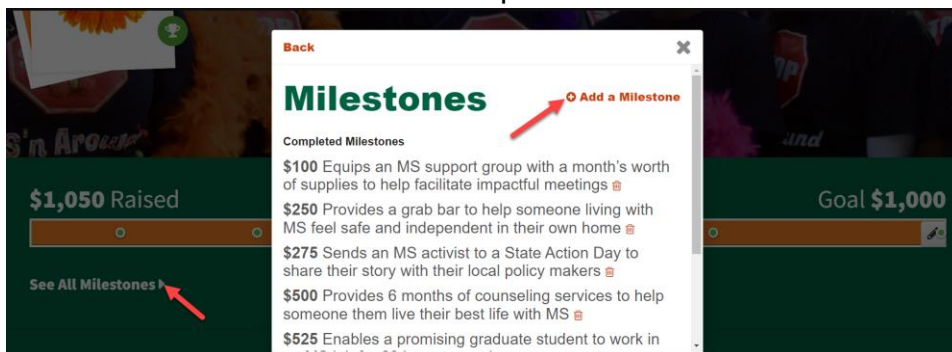
Creating Incentives

1. Log in to your **Fundraiser Portal.**
2. Select **Your Page**.
3. Select the **Edit Icon** next to **Incentives** or **Add an Incentive** and follow the prompts to set up an incentive (Note: Selecting a Quantity Available and Start and/or End Date is a great way to create a manageable scope for your incentives.)
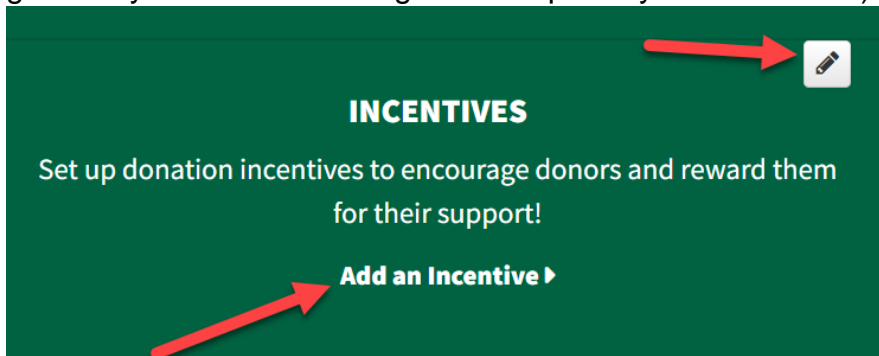
4. Available incentives will be displayed on **Your Page** beneath the fundraising thermometer and **My Badges**, once an incentive has been claimed, it will disappear from this spot.
5. To edit existing incentives, click the **Edit Icon** (as you did to create the incentive) and then click the smaller **Edit Icon** next to the incentive you wish to modify. Click the small **Trash Icon** to remove the incentive.
6. If you opted to include a fulfillment note for your incentive, the answer to the fulfillment note (typically the donor's address) can be found on the **Donor Report,** which can be downloaded from your **Donations** page.

Updating Your Story

1. Log in to your **Fundraiser Portal**.
2. Select **Your Page.**
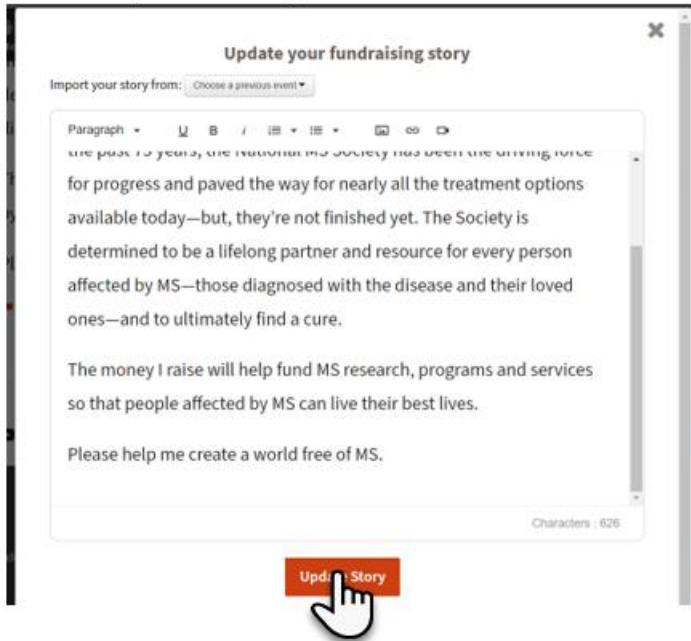3. Select the **Edit Icon** next to **My Story**.
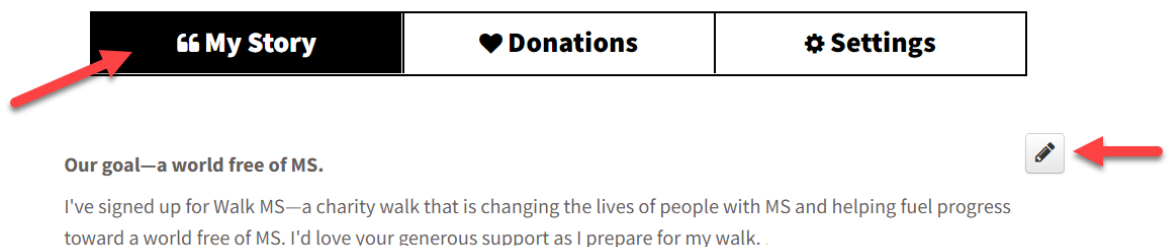
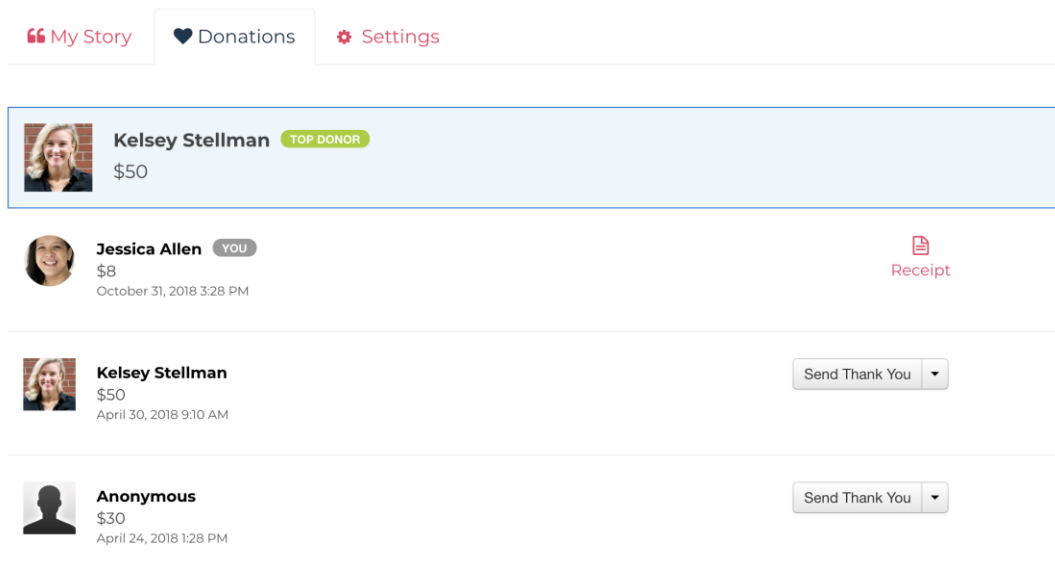4. Enter your new story content, such as text, images, links, or videos.

5.   Select **Update Story**.

Understanding the Donations Tab

1.   Log in to your **Fundraiser Portal.**
2.   Select **Your Page**.
3.   Select the **Donations tab.**
4.   View a list of your donors, **Send Thank You messages**, and download receipts for self-donations.

Updating Your Page Settings

1. Log in to your **Fundraiser Portal**.
2. Select **Your Page**.
3. Select the **Settings** tab.
4. Make any updates to your fundraising page settings such as:
5. **Fundraising Goal**: Another area where your personal fundraising goal can be updated.
6. **Page Link**: Copy or customize your personal fundraising page link.
7. **Facebook Fundraiser**: Create a Facebook Fundraiser directly through your fundraising page. Your Facebook Fundraiser and fundraising page will sync together.
8. **Stream Your Fundraising**: *Add a stream to your page*: If this setting is unchecked, a stream will not be connected to your fundraising page. If this setting is checked, you can select your streaming service (Twitch or YouTube) and enter your username or YouTube URL to have your stream appear directly on your fundraising page.
9. **Privacy**: Update settings relevant to the privacy of your fundraising page:
10. *Allow people to search for my fundraising page*: If this setting is checked, users will be able to search for your fundraising page publicly. If this page is unchecked, users will not be able to search for your fundraising page, you will not appear in fundraising widgets, such as **Top Fundraisers**, and you will not appear on the **Roster** of a team (if you are part of a team).
11. *Show donors on my fundraising page*: If this setting is checked, the **Donations** tab will be visible to any user that accesses your personal fundraising page. If this setting is unchecked, users will not be able to access your **Donations** tab and your **Donations** tab will only be visible to you when you are logged in to the **Fundraiser Portal**.
12. *Show donation amounts on my fundraising page*: If this setting is checked, all donor's donation amounts will be visible to any users under the **Donations** tab of your fundraising page. If this setting is unchecked, only the donor's name will appear on the **Donations** tab; their donation amount will only be visible to you when logged in to the **Fundraiser Portal**.

Fundraising Portal – Team Page

Overview

If you have registered as a team captain or a team member, your **Fundraiser Portal** will show a **Team Page** tab. If you are a team captain, you can make updates to your **Team Page** directly through this tab. If you are a team member, you can view your **Team Page**, but will not be able to make any updates.

Updating Your Team Profile Image

1.   Log in to your **Fundraiser Portal**.
2.   Select **Team Page**.
3.   Select the **Edit Icon** next to your **Team Profile Image**.
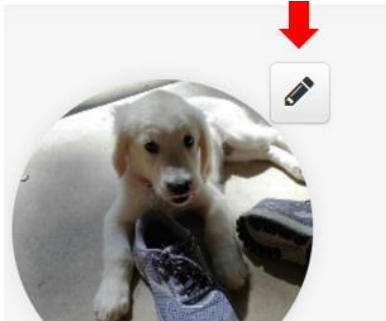
4.   Select **Upload an Image**.
5.   Select your image from your device.
6.   Resize or rotate the image if needed.
7.   Select **Save**.

Updating Your Team Name

1.   Log in to your **Fundraiser Portal**.
2.   Select **Team Page**.
3.   Select the **Edit Icon** next to your team's name.

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4. Enter your new **Team Name**.
5. Select **Update Team Name**.

Updating Your Team Fundraising Goal

1. Log in to your **Fundraiser Portal.**
2. Select **Team Page**.
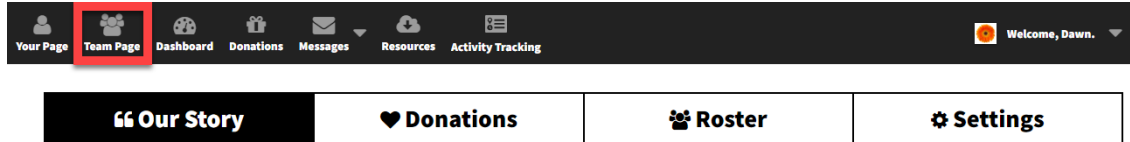3. Select the **Edit Icon** next to your **Team Fundraising Goal**.

4. Enter your new **Team Fundraising Goal**.
5. Select **Update Goal**.

Updating Your Team Story

1. Log in to your **Fundraiser Portal.**
2. Select **Team Page**.
3. Select the **Edit Icon** next to your **Our Story**.

4. Enter your new story content, such as text, images, links, or videos.
5. Select **Update Story.**

Understanding the Donations Tab

1. Log in to your **Fundraiser Portal**.
2. Select **Team Page**.
3. Select the **Donations** tab.
4. View a list of your team donations, **Send Thank You** messages, and download receipts for self-donations.

Understanding the Roster Tab

1. Log in to your **Fundraiser Portal**.
2. Select **Team Page**.
3. Select the **Roster** tab.
4. View a list of the team members on your team from highest amount raised to lowest amount raised, the amount each team member has raised, and how many donations each team member has received.

Updating Your Team Page Settings

1. Log in to your **Fundraiser Portal**.
2. Select **Team Page**.
3. Select the **Settings** tab.
4. Make any updates to your team fundraising page settings such as:
   a. **Banner Image:** upload your own personal team banner image
   b. **Team Fundraising Goal**: Another area where your team fundraising goal can be updated at any time.
   c. **Page Link**: Copy or customize your team fundraising page link.
   d. **Stream Your Fundraising**: Add your stream from YouTube or Twitch to take your fundraising to the next level!
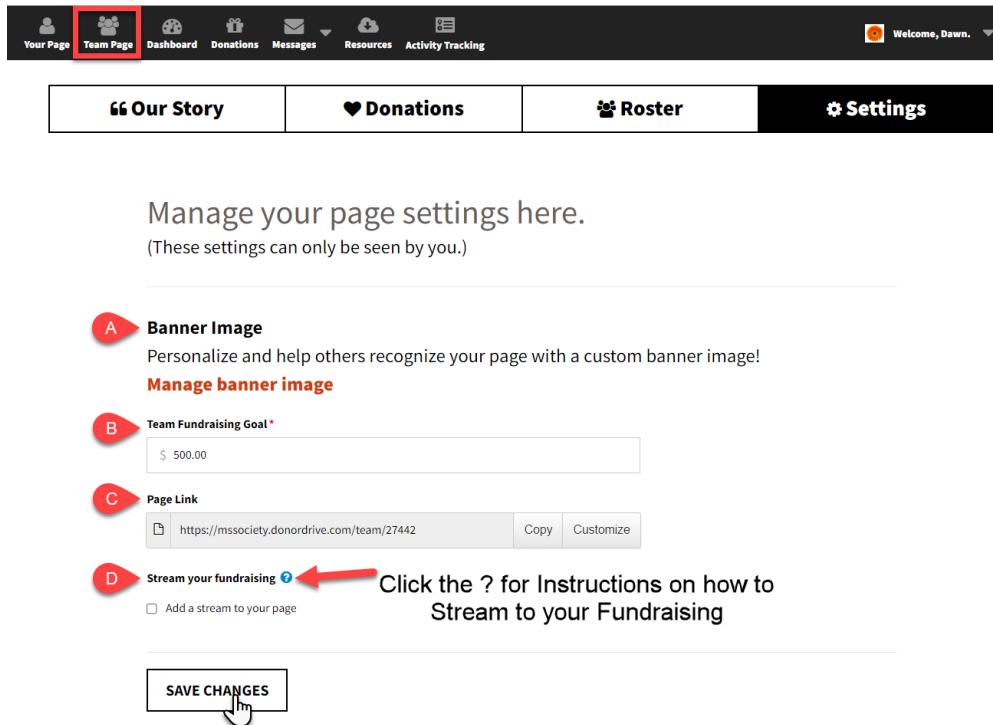
e. **Who can join this team?**
   - *Anyone* - anyone can join the team - no restrictions or exclusions.
   - *Only people who receive an email invitation from me* - only those who receive a direct email from your Fundraiser Portal to ask them to join your team can join the team. Your team does not appear as an option during registration if this is selected.

- *Only people who have the code* - only those who have the unique set by you can join the team. Your team does appear during registration but cannot be joined unless the participant has the code to join your team.
  - *Code* - enter the unique code (4 character minimum, up to 20 characters) that is required to join your team. Once the code is entered and saved, the code can be edited or removed at a later date if needed.

Fundraising Portal - Dashboard

Overview

When you log in to the **Fundraiser Portal**, you will be taken to the **Dashboard**. You can quickly access fundraising statistics, view event resources, and ask friends and family to donate.

Understanding Your Dashboard - Your Fundraising

A carousel will display where you can easily create a message to ask friends to donate, connect your social media accounts, view your fundraising total, view your team contribution (if applicable), view your rank, and create a Facebook Fundraiser (if applicable).

Your Fundraising

This section allows you to stay up-to-date on your fundraising progress and take action from a single place.

- *View Your Page*: This will take you directly to your personal fundraising page.
- *Edit Registration Details (if enabled)*: You can edit responses to custom registration questions, such as your t-shirt size, meal preference, etc.
- *Make a Donation*: You can make a donation to your personal fundraising page.
- *View Donations Received*: You can see donations you've received for this event, thank your donors, add offline donations, and make a donation to yourself.
- *Register Another Participant (if enabled)*: You can register up to 10 additional participants at a time, such as friends, family members, and colleagues for your event.
- ***Create a Facebook Fundraiser (if enabled):* You can create a Facebook Fundraiser that is directly linked with your personal DonorDrive fundraising page**.

Ask Friends to Donate

You can send email updates and post on your favorite social network right from the Dashboard. When you choose to share through any of these tools, a link to your fundraising page will be included.
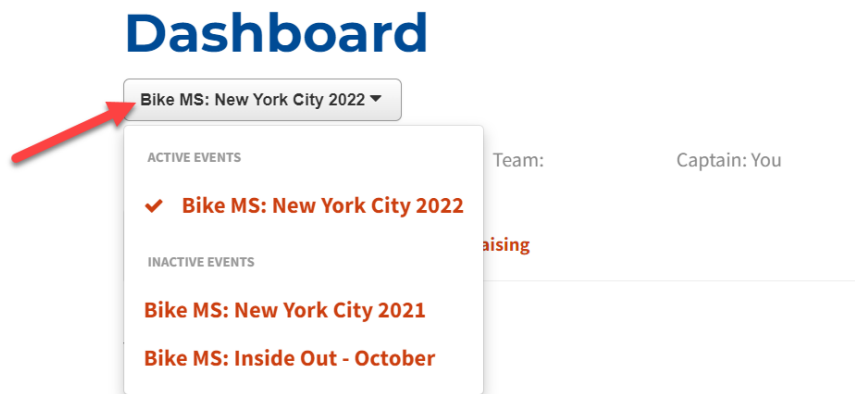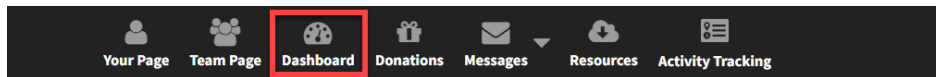
- *Email*: You can send invitations and updates to friends and family through DonorDrive.
- *Facebook*: You can your page on your Facebook timeline.
- *Twitter*: You can send a tweet to their followers.
- *LinkedIn*: You can share to your profile or in a private message.

Event Information

- ***Change Team Membership (if* enabled): You can create a team, join another team, or continue as an individual through this option.**
- ***Change Participant Type(not available for all events):* You can switch from a virtual participant to an in-person participant or vice versa. If you are moving from virtual to in-person, you will be prompted to pay a registration fee. If you are moving from in-person to virtual, your registration fee will automatically be converted to a self-donation.**
- *View Event Page*: This will redirect you to the Event Landing Page.
- *Print Event Info*: You can download a summary of your fundraising efforts as well as the waiver/terms and conditions (if enabled).
- *Download Resources*: This will redirect you to the Resources section of the Fundraiser Portal where you can download documents your event contact has uploaded for you.

Past or Multiple Events: for participants who have returned from past events or have registered for multiple events you can see statistics from those events. Please note, the most current event will default when you log into your fundraising portal. To see your other events, select the dropdown arrow and select the event.

Dashboard

ACTIVE EVENTS

✓ **Bike MS: New York City 2022**

INACTIVE EVENTS

Bike MS: New York City 2021

Bike MS: Inside Out - October

Team: Captain: You

Your Stats

You can track your overall rank within the event, largest donation received, average donation, number of emails you've sent, and your rank on your team if you are a team member or team captain.

Understanding Your Dashboard - Your Team Fundraising

This is available to anyone who is registered as a team member or team captain. Team members are able to track their team's progress, while team captains have more options such as inviting others to join the team or customizing the team's fundraising page.

Team Fundraising

Team captains and team members will be able to view and take key actions toward a team's fundraising goal, such as:

- *View Your Team Page*: You can view the team fundraising page. If you are a team captain, you can edit the team's fundraising page.
- *Make a Donation*: You can make a donation to your team.
- *Register Another Participant (if enabled)*: You can register up to 10 additional participants at a time, such as friends, family members, and colleagues for your event.

Your Team

Team captains and team members are able to view the team's progress and continue their fundraising efforts.

- *Send a Message to Your Team*: Team captains can create a team update to send to team members.
- *View Your Team*: Team members can view their team's progress. Team captains can view progress, send an email to the team, and print their team's fundraising status.
- *Change Team Membership (if enabled):* Team members can change their team affiliation, create a new team, join another team, or continue as an individual. This permission can be enabled in the admin.
- *Invite a Someone to Join Your Team* – Team captains and team members can invite other people to join the team.

Fundraising Portal – Donations

Overview

In your **Fundraiser Portal**, you can view the donations you've received or make a donation.

- Donations Received
- Make a Donation

Donations Received

The **Donations Received** tab will list any donations you've made to yourself or received from friends and family. Your thermometer will state how much has been raised in comparison to your overall fundraising goal. You can easily thank donors via the **Gratitude Generator** by selecting a specific donor and sending a thank you message or selecting multiple donors and sending those donors the same thank you message.

This is also where you can download your Donor Report, by selecting **Download Donor Report** above the thermometer on this page. This will generate an Excel spreadsheet with your donor's names and email addresses.
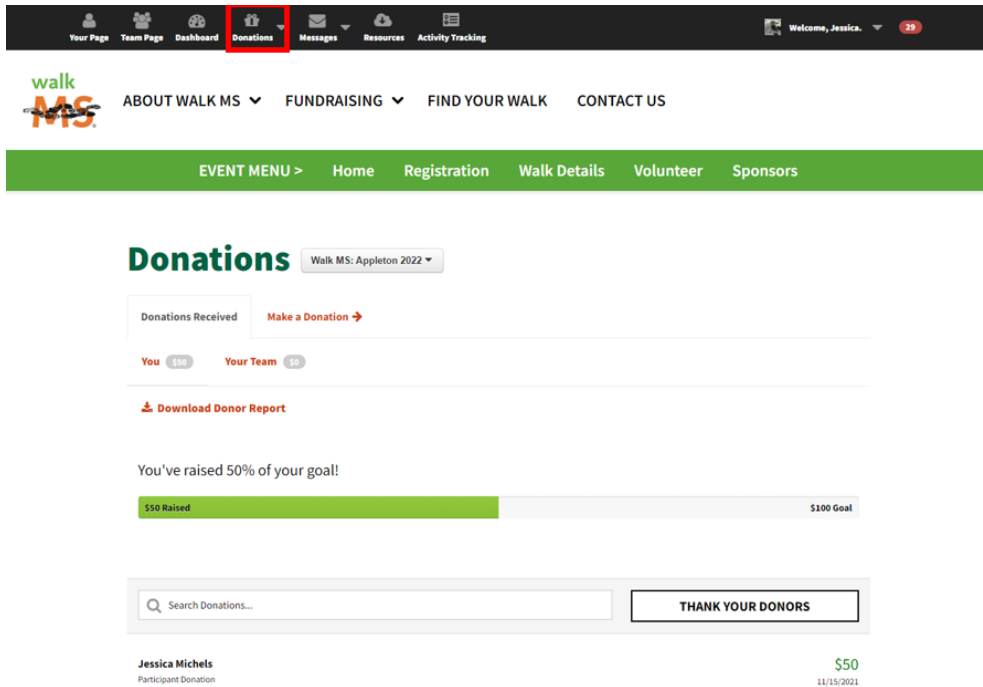
Make a Donation
You can easily make a donation towards your fundraising goal by selecting **Make a Donation**. This will automatically default to your own personal fundraising page, but you can find other fundraisers and/or teams by navigating to the main event page and searching for another participant or team.

Fundraising Portal – Messages

Overview
The **Messages** tab allows you to send messages to your friends and family by uploading a contact list through webmail, CSV file, and enter email addresses directly in the Recipients text box.

Sent Messages

The **Sent Messages** tab shows any email invitations and updates that have been sent out through the Messages area. You can easily copy a sent message or resend the same message to anyone who didn't respond to each message. You can also see how many recipients have donated and your total raised based on the email that was sent.

Thank You emails do not appear in this area. **Thank You** emails will appear as sent within Your Page > Donations OR Donations > Donations Received.

Compose a Message

You can create new messages under the **Compose a Message** tab. You may have different message type options available based on your participant role (individual, team member, or team captain).

1. Select a **Message Type**.
2. Select your **Recipients** by either **Importing from Webmail**, uploading a **CSV File**, selecting from your **Contacts, or** typing your recipients email addresses directly in the recipients text box.
3. Update your email subject (if needed)
4. Update your email content (if needed)
5. Select **Send Message** when you are ready to send the message to your recipients.
   a. Or save the email as a draft or send yourself a test email.

Available Message Types per Participant Role

- **Ask a Friend to Donate:** Individuals, Team Members, and Team Captains.
- **Fundraising Update:** Individuals, Team Members, and Team Captains.
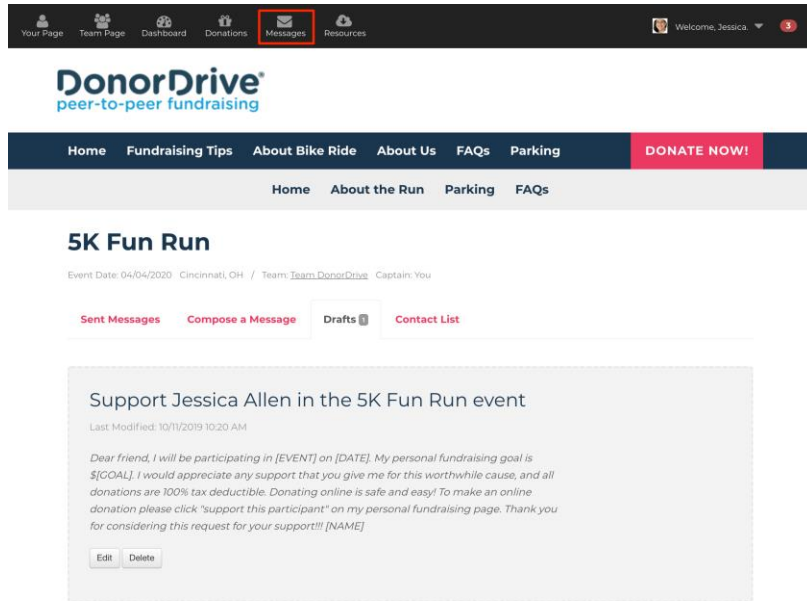
- **Ask a Friend to Join:** Team Captains.
- **Team Update:** Team Captains.
- **Ask a Friend to Donate to Your Team:** Team Captains.

Recipients

When **Select from Contacts** is selected, your available recipient lists are:

- **Contacts who haven't donated to you yet:** This will filter your contact list and display only people in your Contact List who *haven't* donated to you (in any event).

- **Contacts who have donated to you in this event:** This will filter your contact list and display only people who *have* donated to you in the current event you are viewing in your Fundraiser Portal.
- **Contacts who have donated to you in past events:** This will filter your contact list and display only people who *have* donated to you in past events you've participated in.
- **All Contacts:** This will display everyone in your Contact List.

When **Import from Webmail** is selected, you can import your Contact List from Gmail, Outlook.com, Outlook, Yahoo, iCloud, Mac Contacts, LinkedIn, or AOL.

When **Import from CSV File** is selected, you can import contacts from a .csv file with first name, last name, and email. Each uploaded spreadsheet can contain no more than 100 contacts in order to successfully upload. If you plan to download contacts from your old fundraising portal and upload them to the new one, please view the "Download-Contacts-Donors-Rosters" PDF in the **Resources** tab of your fundraising portal for more details.

Drafts

The **Drafts** section will list any drafts that you have saved previously. You can easily edit or delete the draft. When editing the draft, you will have the option of updating the Message Type, Recipients, Subject, and Content of the email.

Contact List

The **Contact List** section will display any contacts you've uploaded or emailed previously. The **Contact List** will state the contact's first name, last name, email, amount donated, and total amount donated. You can add new contacts through this section by selecting **Add Contact** or **Import Contacts**. You can also edit contact's records or delete contacts if needed.

Fundraising Portal – Resources

Overview

The **Resources** section contains helpful event documentations, such as fundraising guides and posters. Simply select **Download File** next to the document you'd like to download, and the document will download to your computer.

![National Multiple Sclerosis Society logo]

Fundraising Portal - Activity Tracking

Overview

Activity Tracking allows you to easily keep track of your activity to move you closer to your overall activity goal. When viewing the Activity Tracking tab, you'll be able to log activity, edit your personal and/or team activity goal, and view your current streak or longest streak, which will help motivate you and your team to keep being active towards your goal. When viewing your personal or team fundraising page, friends and family will see how much activity you've completed, such as how many steps or miles you've already accomplished.
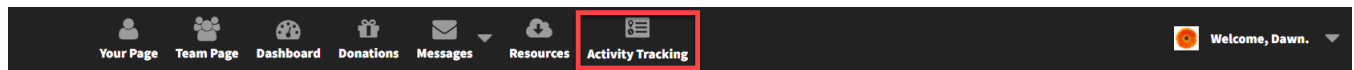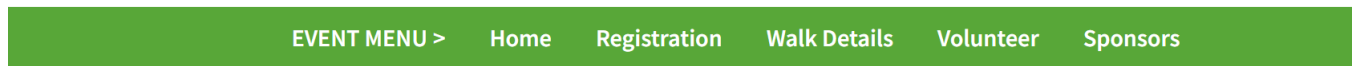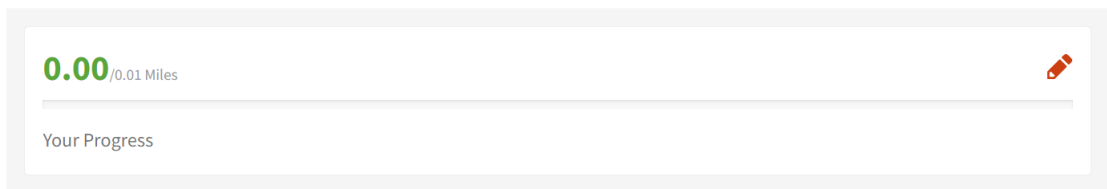
Fundraising Portal - Account

After selecting "**Welcome, NAME**," you will be taken to your Fundraiser Account. From here, you can make updates to your information, such as first name, last name, and address information. You can also see overall information such as your total raised, how many donations you've received, how many events you've participated in, and how many emails you've sent. Under the Account section, you can also select **Donations Received**, **Communication Settings**, and **Switch Account** (if applicable).
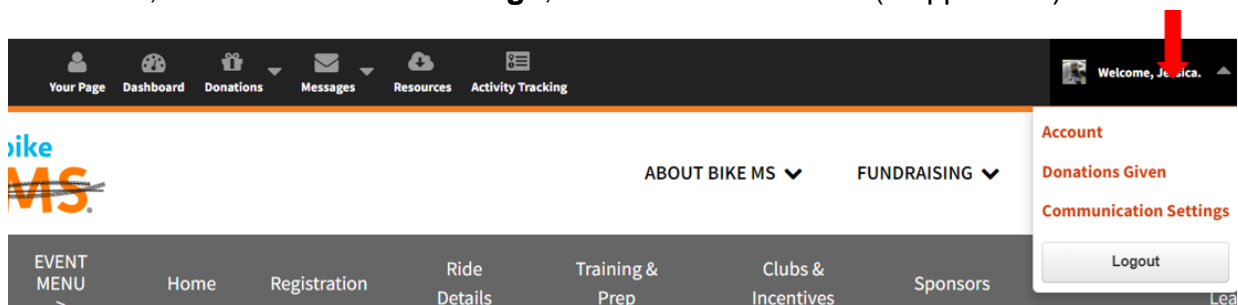
Account
You can access your account by selecting "Welcome, NAME" **Account**. You can edit your account information, view your total raised, view the number of donations you've received, view the number of events you've participated in, and view the number of emails you've sent. You can also view **Registration Details** about the event(s) you're participating in or have participated in previously. You can also edit some registration questions.

Updating Account Information
1. Select "**Welcome, NAME**" **Account**.
2. Select **Edit Info**.
3. Update information such as profile image, first name, last name, password, email, and address information.

![National Multiple Sclerosis Society logo]

4. Select **Update Profile**.

Donations Given

You can view the donations you've made, download receipts, search for donations, see your total amount given, or select **Donate Now** to make a donation.

Communication Settings

You can link your DonorDrive Fundraiser Account with Twitter and/or Facebook accounts. Once you've connected your DonorDrive account to each social network, you will see a checkmark indicating you have successfully connected your accounts. If you'd like to no longer have your social media account, simply select **Disconnect**. These social applications are also promoted on your **Dashboard**.

You can also sign up for text message alerts.

Switch Account

Some of our events offer the option to register additional participants, if you have done this, you will have the option of managing an additional participant's account. This means you will not be required to enter a valid email address for this participant, and you can switch over to these additional participants account through the **Switch Account** option. After switching accounts, you will be logged in as the additional participant, where you can make updates to that participant's fundraising page, send emails, and more.
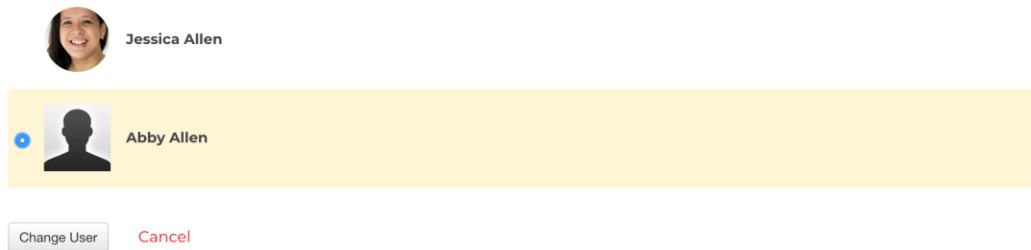
Simply select the account you'd like to log in as and select **Change User**. You will then be logged in as the user you've selected.

If you have any additional questions, please feel free to contact our Fundraising Support Team at FundraisingSupport@nmss.org or 855-372-1331.