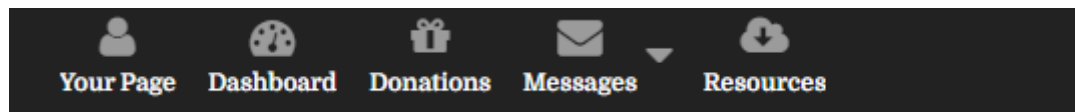


## How to Navigate Your Fundraiser Portal

### Yale School of Medicine Digital Fundraising

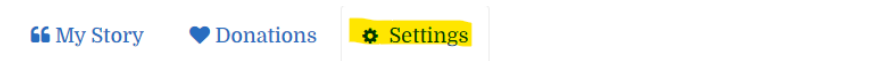
#### 1. YOUR FUNDRAISER PORTAL NAVIGATION BAR

- When you are logged into your fundraiser portal, there is a navigation bar at the top of the page containing quick links to Your Page, Donations, Dashboard, Messages, and Resources:



#### 2. YOUR PAGE

- On your personal fundraising page, you can update your page settings and see donations to your fundraiser.
- The “Settings” tab** will allow you to change your banner image, campaign date, fundraising goal, page link, and privacy. It also provides you with an option to Stream your fundraiser through YouTube or Twitch. (Other settings, such as updating your story and profile picture, are done via the pencil icons)



### Manage your page settings here.

(These settings can only be seen by you.)

#### Banner Image

Personalize and help others recognize your page with a custom banner image!

[Manage banner image](#)

#### Campaign Date

#### Fundraising Goal \*

#### Page Link

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Stream your fundraising [?](#)

Add a stream to your page

Privacy

Allow people to search for my fundraising page.

Show donors on my fundraising page.

Show donation amounts on my fundraising page.

SAVE CHANGES

- **The “Donations” tab** on Your Page provides you with a list of all donations made to your fundraiser. This includes donor and amount. Through this section, you can also **send thank you emails** to those who have donated to your fundraiser! Simply click the “Send a Thank You” box next to the donation, and a box with a pre-filled email thank you message will pop up for you to edit or send out as is.

“ My Story

♥ Donations

⚙ Settings

📄 Download Donor Report

SF

Smith Family **TOP DONOR**  
\$80

SF

Smith Family  
\$80  
January 19, 2024 11:42 AM

Send Thank You

## SEND A THANK YOU EMAIL



Subject\*

Thank you for the generous gift!

Message\*

Thank you so much for supporting me with your generous donation to the Yale School of Medicine and helping me on my way to reaching my goal!

SEND THANK YOU

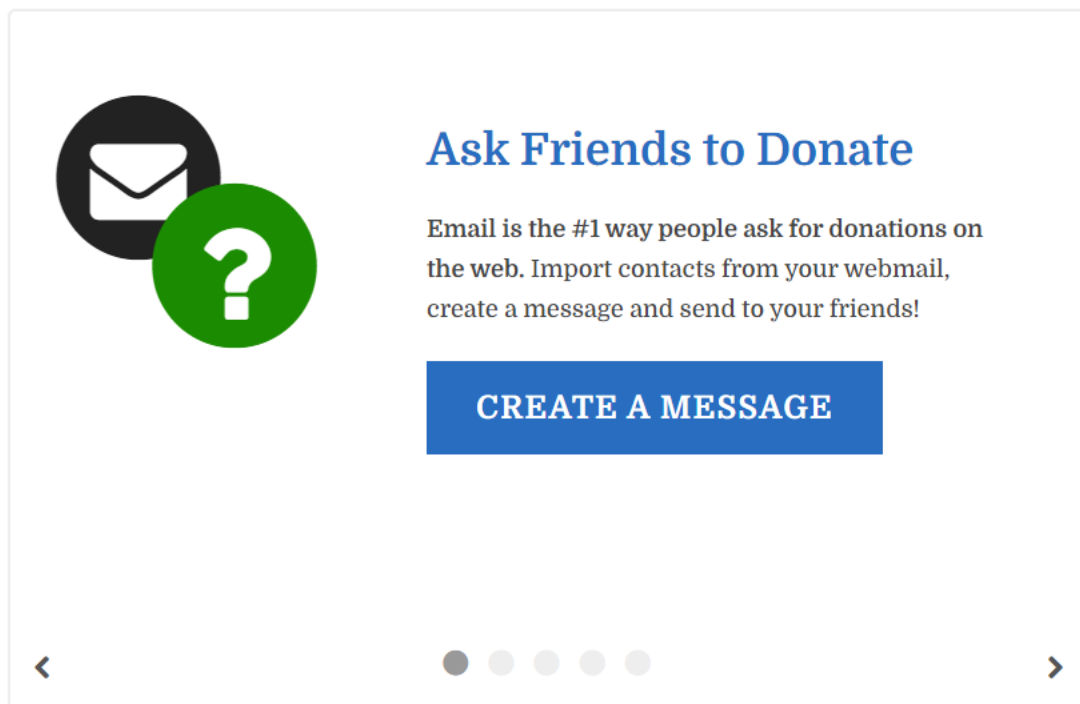
[Cancel](#)

## 3. DASHBOARD

- Your fundraiser dashboard provides you with a quick snapshot of your fundraising stats and provides you with quick links to create messages, connect with social networks, and edit your fundraising page.

## Dashboard

Fundraise Your Way ▾



The card features an icon on the left consisting of a black envelope icon inside a black circle, partially overlapping a green circle with a white question mark. To the right of the icon, the title "Ask Friends to Donate" is displayed in blue. Below the title, a paragraph of text explains that email is the most common way to ask for donations and suggests importing contacts and creating a message. A prominent blue button with white text "CREATE A MESSAGE" is centered below the text. At the bottom of the card, there are navigation arrows on the left and right, and a row of five dots in the center, with the first dot being filled.

### Ask Friends to Donate

Email is the #1 way people ask for donations on the web. Import contacts from your webmail, create a message and send to your friends!

[CREATE A MESSAGE](#)

## Your Stats

1 / 3 Overall Rank	0 Donor Emails Sent	2 Donations Received
\$80.00 Largest Donation	\$80.00 Average Donation	

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## 4. DONATIONS

- Your Donations tab will provide you with an overview of all donations made to your fundraiser (as well as a downloadable report of all these donations), a thermometer with your progress in relation to your fundraising goal, and an option to **thank your donors**.

### Donations

Fundraise Your Way for the Yale School of Medicine ▾

[Download Donor Report](#)

You've raised 3% of your goal!

\$156 Raised

\$5,000 Goal

Search Donations...

THANK YOUR DONORS

Ashley Smith  
Personal Campaign Donation

\$1  
03/06/2024

- Offline Donations are donations that you receive in the form of check. Even though these donations were not made through your digital fundraising page, we can manually add them to your page so you may better track your fundraising progress. Please see our [Fundraiser Guide to Offline Donations](#) for offline donation instructions.

## 5. MESSAGES

- The Messages tab is where you can send a message to invite others to donate to your fundraiser or send a message to provide a fundraising update.
- You can also create your own personalized contact list in this section by clicking the "Contact List" tab.

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- Click “Compose a Message,” choose your message type from the drop down, choose your recipients by selecting contacts from your current contact list, by uploading a CSV, or by importing contacts from your webmail:

Sent Messages   Compose a Message   Drafts **1**   Contact List

---

1 Choose a message type\*

Ask a Friend to Donate

---

2 Recipients\*

Select from Contacts   **Import from Webmail or CSV**

Please note: you may separate email addresses by comma, semicolon, or one address per line. Messages can be sent to a maximum of 100 recipients. This limit helps your message get delivered.

- Once your contacts are imported, personalize your subject line and message! Make it personal to your fundraiser and goals. **\*PLEASE NOTE THAT LANGUAGE IN [BRACKETS] WILL REMAIN AS IS IF NOT UPDATED BY YOU. YOU MUST REMOVE BRACKETS MANUALLY AND ADD YOUR OWN LANGUAGE\*:**

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3

Subject\*

Support Ashley Smith in the Fundraiser In Memory of John Smith

4

Message\*

Paragraph ▾  U   **B**   *i*  ☰ ▾ ☷ ▾ 📎 ↻

Hello friend! I've started a fundraiser supporting *[enter your specific cause here]* at the Yale School of Medicine, and I need your help! I'm trying to raise *[enter your fundraising goal here]* and every dollar counts. Can you take a few moments and make a donation? It's quick and easy and all donations are tax-deductible.

I greatly appreciate any support that you can give for this worthy cause at the Yale School of Medicine!

Thank you!

## 6. RESOURCES

- The Resources tab will take you to a page containing helpful resources as you start your fundraiser.

If you have any additional questions regarding fundraising page navigation, please contact us as [digitalfundraising@yale.edu](mailto:digitalfundraising@yale.edu).