



DonorDrive[®]
SOCIAL FUNDRAISING
by  Global Cloud[®]

DonorDrive Fundraising Guide

Getting Started with Online Fundraising

Table of Contents

Dashboard

Event Information	4
Personal Fundraising Statistics	4
Team Fundraising Statistics	5
Personal Fundraising Page	5
Social Media	6
Team Fundraising Page	7

Donations

Viewing Donations	8
Adding Offline Donations	9
Making Donations	9

Messages

Adding Contacts	10
Sending Messages	10

Resources

Downloads	12
-----------	----

Your Fundraising Profile

Customizing Your Profile	13
Settings	13
Donations Given	14
Alerts	15

FAQs

Forgotten Passwords	16
Registering Another Participant	16
Changing Teams	17
Fundraising First Steps	17

We here at DonorDrive created this guide to help you navigate your Fundraiser Portal. Your DonorDrive Fundraiser Portal will help you bring awareness and raise donations for your cause.

Start by logging into your Personal Fundraiser Portal using the email address and password created when you registered for your event.

Good luck with your fundraising!

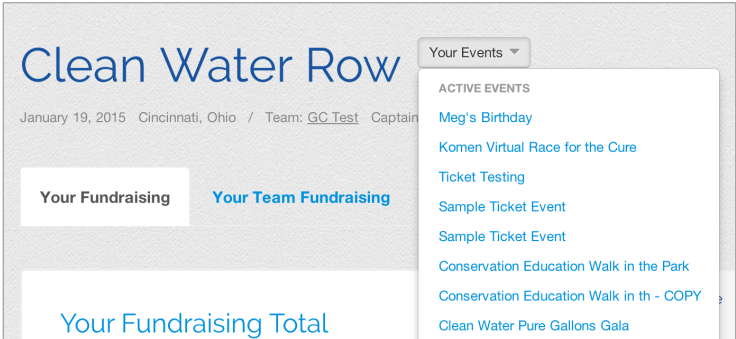
-The DonorDrive Team

Dashboard

Your Dashboard gives you instant access to your fundraising statistics and offers quick ways to link your fundraising page to your social media accounts.

Event Information

The drop down menu under Your Events lists all of the active and non-active events for which you are registered. Select one from the list to jump to your Dashboard for that specific event.



The Dashboard will display a limited amount of information about the event, including the event date, location, your team and your team captain.

Personal Fundraising Statistics

Directly underneath the event information you will find two tabs - one for your Personal Fundraising and one for your Team Fundraising. Selecting Your Fundraising will display a rotating window of information about your fundraising progress, including your total donations, your ranking on your team and how much you have contributed to your team's total goal. It will also prompt you to send messages asking for donations and to connect to your social media accounts.

In the right side panel you will also see an area to connect to your social media accounts. Underneath this section there is a link to your fundraising page- you can either select to view the page or to edit it.

Get Started Fundraising



Post



Tweet

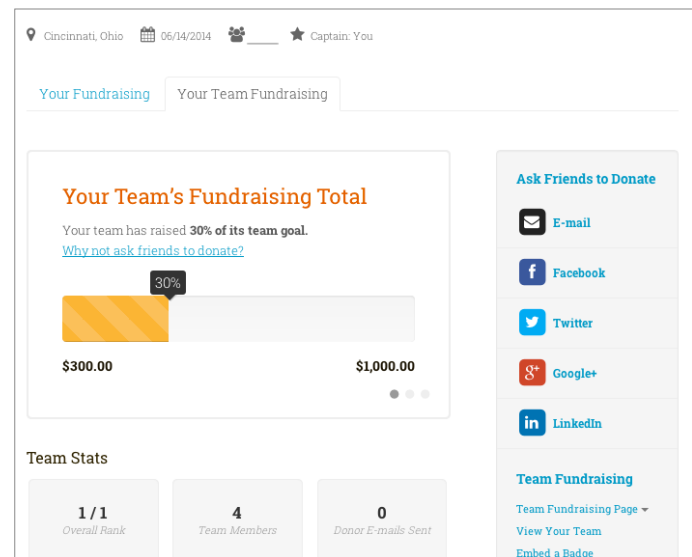


E-Mail

Team Fundraising Statistics

Team Fundraising features statistics on your entire team's accomplishments. The window will show your team's rank in comparison to other teams participating in the event, along with how close you are to achieving your team's fundraising goal.

Below the rotating window you will see more detailed statistics about your team, such as how many team members you have, how many messages have been sent out and how many total donations you have received.

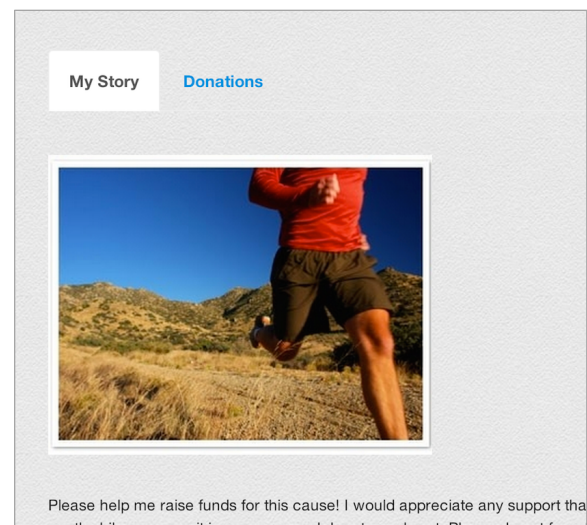


In the side panel next to your team statistics, you will find quick links to your team fundraising page.

Personal Fundraising Page

Your Personal Fundraising page is the face you present to the public. Your donors will visit this page, so be sure to customize it and to make it as personal as possible.

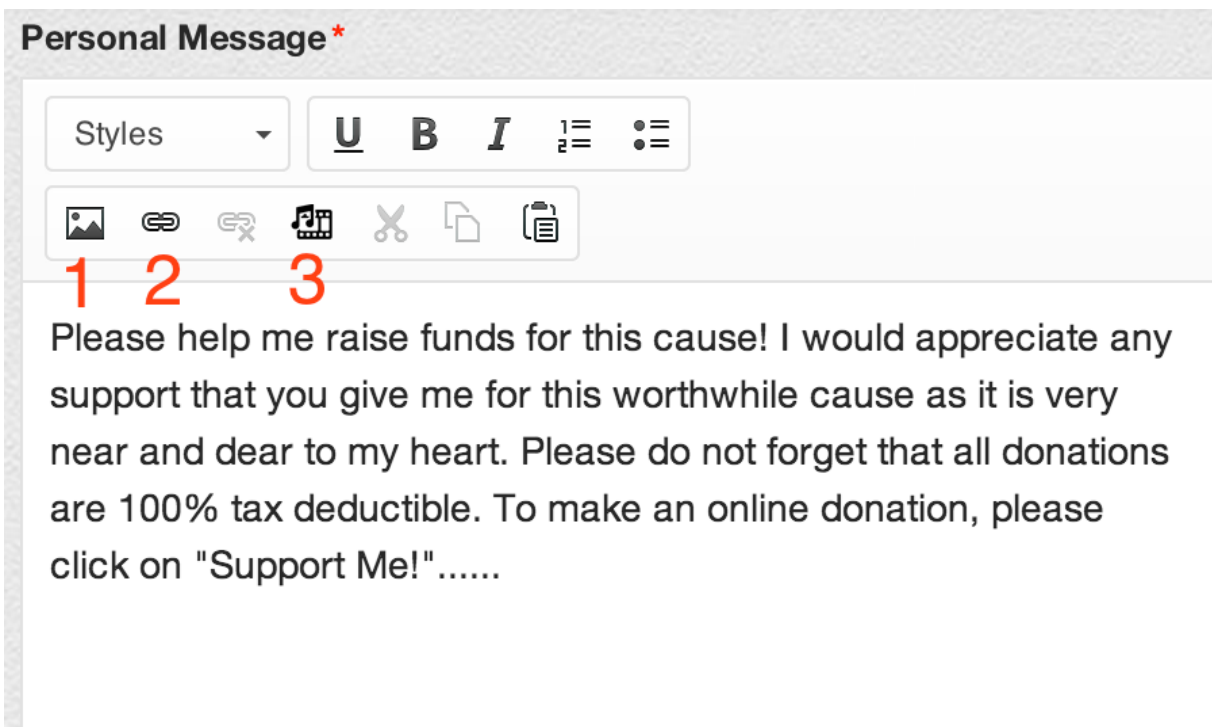
Your page is broken up into two sections: My Story and Donations. The Donations tab lists all donations you have received, along with any special messages written by the donor.



My Story is where you get to customize your page. One of the simplest ways to do this is to add a picture! Click on the small pencil in the bottom right corner of the picture box and you will see a drop down menu including Update Profile Picture. You can upload a JPG, GIF or PNG image file or directly import your profile picture from Facebook or Gravatar.

Your story tab may already contain a message written by your event host, typically explaining the goals of the event and providing some background on the organization. You can alter this message or write your own by clicking the pencil and selecting the second option, Edit this Page. This option will reveal a rich-text content editor which helps you add color and interest to your page. The style drop down menu features a selection of fonts and colors. You can add in multiple photos by clicking on the image button (1). Direct visitors to another site by linking specific text using the hyperlink tool (2). You can also embed videos from YouTube, Vimeo or Twitch directly onto your page using the Embed button (3).

At the very bottom of the edit page, you will find three page settings options- “show donors on my page”, “show donation amounts on my page” and “make my page searchable”. De-selecting these boxes will affect how your fundraising page appears to visitors. Be sure to save your edits once you have completed updating your page by clicking Save Changes.



The screenshot shows a rich-text editor titled "Personal Message*". The interface includes a "Styles" dropdown menu, followed by icons for text formatting: Underline (U), Bold (B), Italic (I), Bulleted List, and Numbered List. Below these are icons for inserting an image (1), a link (2), and an embed (3). The main text area contains the following message: "Please help me raise funds for this cause! I would appreciate any support that you give me for this worthwhile cause as it is very near and dear to my heart. Please do not forget that all donations are 100% tax deductible. To make an online donation, please click on "Support Me!"....."

Social Media

There are numerous places to connect your fundraising page and your other social media accounts. Using social media outlets, such as Facebook and Twitter, is an amazing way to gain awareness for your cause and to recruit additional donors as well.

Your dashboard side panel offers places to connect to Facebook, Twitter, Google + and LinkedIn. You must provide your username and password to verify the account. Once your account has been verified, you can post directly to your social sites simply by clicking a button and composing your message.

You can get the code to embed one of several badges on any site that accepts HTML iFrame code by clicking Embed a Badge. It opens up your fundraising to endless possibilities.

“Get the Word Out” boxes are located on both your individual and your team fundraising pages. These icons help you directly post to your social sites and include links to your fundraising pages.

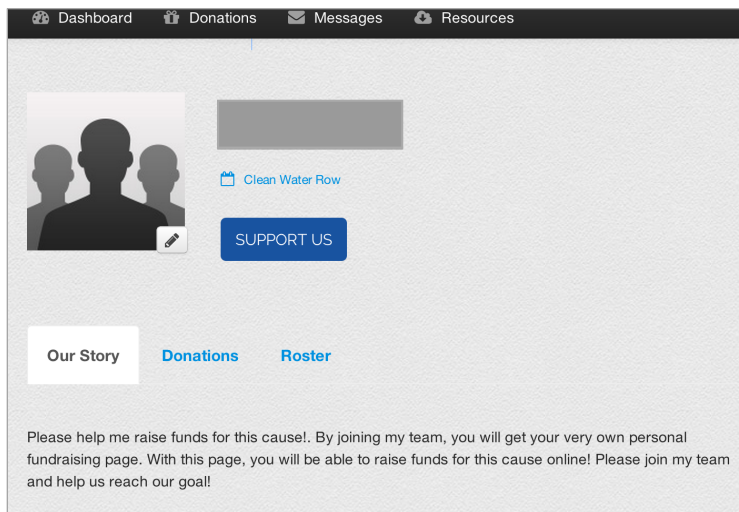
The image shows a vertical sidebar menu. The top section is titled "Ask Friends to Donate" in blue. It contains five buttons with social media icons: "E-mail" (envelope icon), "Facebook" (f icon), "Twitter" (bird icon), "Google+" (g+ icon), and "LinkedIn" (in icon). Below this is a section titled "Your Fundraising" in blue. It contains four links: "Make a Donation", "Your Fundraising Page" (with a dropdown arrow), "View Donations Received", and "Embed a Badge".

Team Fundraising Page

Your Team Fundraising page- accessible either from your

Dashboard or by clicking on the team name on your personal fundraising page- practices the

same basic layout as your personal fundraising page.



Just like your personal fundraising page, your team fundraising page can be edited and customized by clicking the small pencil next to your team photo- but only by team captains.



Pro Tip: People who share their stories on social media are twice as likely to raise more money. Get creative with your posts and always include the link to your fundraising page. You can share on social media from your fundraising page or on the Dashboard.



Donations

Need to view all the donations you have received or add in new ones? The donations tab on the toolbar lists donations you have received and includes tools to foster communication between yourself and your donors.

Viewing Donations

In your Fundraiser Portal, you can view all donations in one place. The total amount of donations you have received is displayed at the top of the page and the chart underneath breaks that number down donor by donor. You can see who donated how much, when and if they wrote a special message.

Total Received: \$100.00

Send Thank You Edit Delete Search

<input type="checkbox"/>	Amount	Date	Donor	Thank You E-Mail
<input type="checkbox"/>	\$10.00	11/01/2013	Lauren _____ _____ LOVE!	Send Thank You
	\$15.00	11/01/2013	Lauren _____ _____	<input checked="" type="checkbox"/> Thank You Sent
	\$25.00	10/22/2013	Adam _____ _____	<input checked="" type="checkbox"/> Thank You Sent
	\$25.00	10/21/2013	Ralph _____ You go girl...proud of you, _____	<input checked="" type="checkbox"/> Thank You Sent

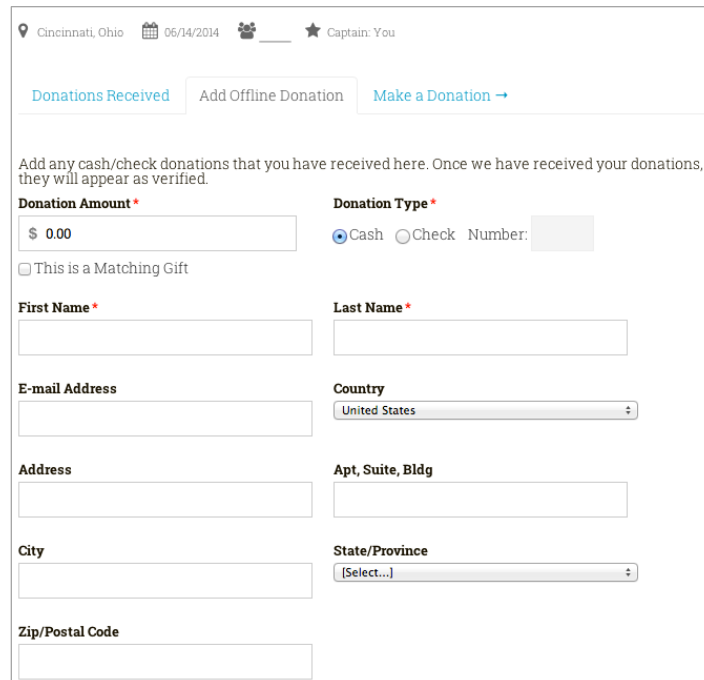
You can show your gratitude by sending a thank you email directly from your portal (if the donor shared their email address). At the end of each line of donations is an area for thank you emails. If you have not yet thanked your donor, you will see a Send Thank You button. Simply click on this button and you can personalize a default email with the donor's name (i.e. Mom or Grandpa, instead of the generic greeting) or by adding a special note of your own.

Team captains will receive alerts regarding all team donations and can send a thank you on behalf of their teammates.

Once you have sent a thank you message, you will see a Thank You Sent accompanied by a check mark in this final column. You can send multiple thank you messages simultaneously by checking the Select All box on the left side.

Adding Offline Donations

Your Fundraising Portal features an area to add in offline donations in your Donations section. All you need to supply is the amount of the donation and the donor's name. After entering this information, you will have to mail the cash or check to the organization for verification. Until that donation is received and approved by the organization, this donation will show up as pledge on your donations page.



The screenshot shows a web interface for adding an offline donation. At the top, there is a navigation bar with a location pin icon, the text 'Cincinnati, Ohio', a calendar icon with the date '06/14/2014', a gift icon, and a star icon with the text 'Captain: You'. Below this is a menu with three items: 'Donations Received' (highlighted in blue), 'Add Offline Donation', and 'Make a Donation →'. The main content area contains the following text: 'Add any cash/check donations that you have received here. Once we have received your donations, they will appear as verified.' The form fields are as follows: 'Donation Amount *' with a text input containing '\$ 0.00'; 'Donation Type *' with radio buttons for 'Cash' (selected) and 'Check', and a 'Number:' input field; a checkbox labeled 'This is a Matching Gift'; 'First Name *' and 'Last Name *' with text input fields; 'E-mail Address' with a text input field; 'Country' with a dropdown menu showing 'United States'; 'Address' with a text input field; 'Apt, Suite, Bldg' with a text input field; 'City' with a text input field; 'State/Province' with a dropdown menu showing '[Select...]'; and 'Zip/Postal Code' with a text input field.

Making Donations

The final category under Donations allows you to directly donate to your own page. Any donation you make to yourself will also show up on your Donations tab.

If you choose to enter a donation for someone else, make sure you log out first or else the donation will show up in your name. A helpful hint - anytime you see the black toolbar across the top, you are still logged into your account.



Pro Tip: Donate to yourself! Get the ball rolling by making the first donation towards your fundraising efforts.



Messages

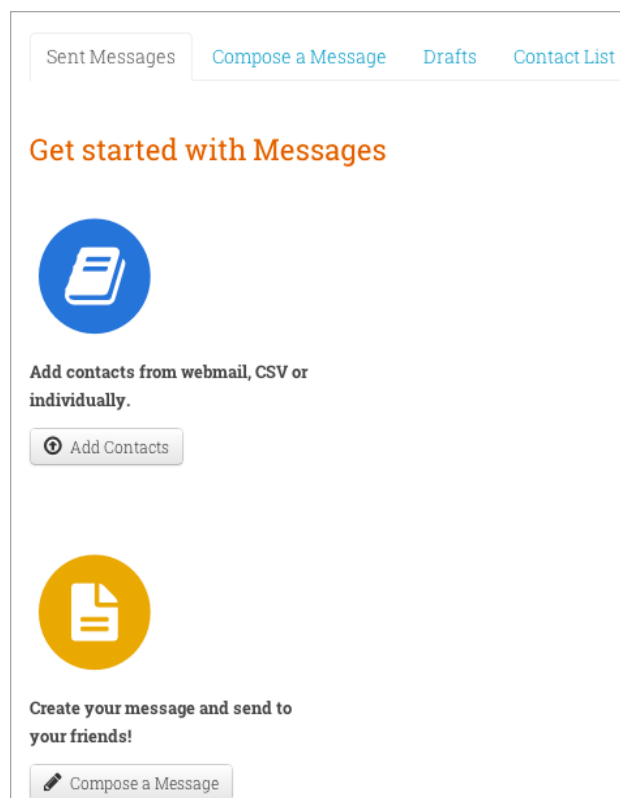
Messages provides an easy way to keep in touch with your donors and to invite others to join or contribute to your cause. Upload your address book directly into your Fundraising Portal and start sending some invitations!

Adding Contacts

Your Fundraiser Portal allows you to import your address book, either through a webmail list or a CSV file. Under Contacts List select Import Contacts.

For webmail imports, the screen will direct you to log into your account to verify your identity. CSV file imports will ask you to identify the file on your computer's drive. Once the import is complete, your addresses will appear in your contacts list within your Fundraiser Portal. You can also add individual email addresses by selecting Add Contact and manually inputting their information.

You can adjust how your contact list is sorted by clicking on different column headers within the list. There is also a search function located above the contact list to help you locate a specific address.



Sending Messages

Messages keeps track of sent messages, drafts, and allows you to create new messages to send to your friends and families.

Under Compose Message, you may find a variety of default emails ready for you to send under Message Types. Common examples include: Invite a Friend to Donate, Send a Fundraising Update, or Ask Someone to Join.

You can still edit all of these messages types. Simply click in the text box and add in your own content using the same editor explored earlier.

You can even send a test message before emailing it out to everyone by selecting Send a Test Message to Myself at the bottom of the page. Now you can preview exactly what your message will look like and if you decide your message is not ready to send, save it as a draft and complete it at a later time.

The screenshot shows a message creation interface with four numbered steps:

- 1 Choose a message type***: A dropdown menu is set to "Ask a Friend to Donate".
- 2 Recipients***: Includes "Select" and "Import" buttons, a large text input field, and a note: "Please note: you may separate e-mail addresses by comma, semicolon, or one address per line."
- 3 Subject***: A text input field containing "Support Me in the Clean Water Row event".
- 4 Message***: A rich text editor toolbar with options for Styles, Underline (U), Bold (B), Italic (I), Bulleted List, Numbered List, Image, Link, Unlink, Undo, Redo, and Print.

Sent messages will record how many emails you have sent from your Fundraising Portal. It will also record how many of those emails have resulted in donations and the amount totaling from those donations. Messages remembers who did not respond to your invitation to donate and gives you the option to resend your email only to those who have not yet donated.



Resources

Any file your event host uploaded to Resources is available to you for download. The list of available resources will be arranged alphabetically and can contain resources from several events. If you register for both a marathon and a bake-off hosted by the same organization, resources uploaded for both events would appear in one singular list.

Downloads

Any file your event host uploaded to Resources is available to you for download. The list of available resources will be arranged alphabetically and can contain resources from several events. If you register for both a marathon and a bake-off hosted by the same organization, resources uploaded for both events would appear in one singular list.



Pro Tip: Start asking early! The earlier you begin asking people to contribute, the more you will raise!



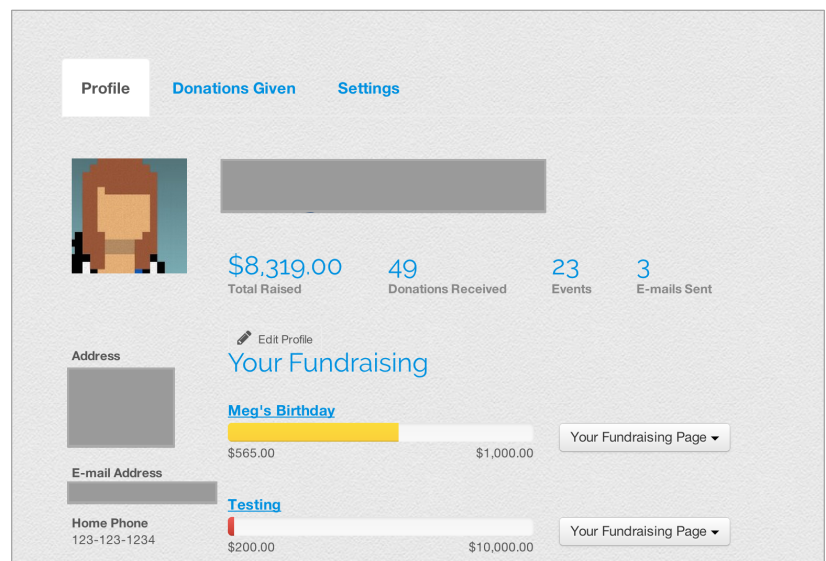
Your Fundraising Profile

Your profile compiles statistics from all your events and displays them in both condensed and extended formats. This is also where all of your personal details registered with the organization are stored and edited. Unlike your personal fundraising page that is visible to the public, this page is only for you.

Customizing Your Profile

At the top of the page you will find combined statistics - the total amount you have raised for the organization, the number of events you participated in, even how many emails you have sent.

The individual statistics for each event are found below, featuring a small version of your fundraising thermometer to track your progress. Each thermometer also includes a direct link the fundraising page for that specific event.



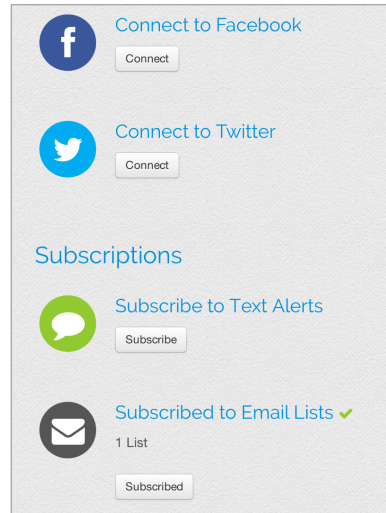
On this page you will also find your registered personal information including address, email and phone number. You can also upload a profile picture that will act as your icon on your fundraising pages and for your donations to fellow participants. To update this information, click the edit button and make sure to save!

Settings

Your profile settings control the organization's email lists to which you are subscribed. If you wish to receive future communication from the organization about their upcoming events, you may want to subscribe to their monthly newsletter. You can also go back into settings and unsubscribe at any time.

Settings also offers another opportunity for you to link to your Facebook and Twitter accounts. Connecting here on your main profile will automatically link your social account to all of your events- sign in once and you're done!

You can also input your mobile phone number to receive mobile text alerts, such as when your page receives a donation. Please be aware that standard text messaging rates do apply if you sign up for this feature.



Donations Given

Donations Given is an easy way to track all the donations you have made to this organization. Your donations are compiled into one list, typically organized by donation date, and are searchable by event name, participant name or date. PDF copies of your receipts are available for download.

Below is a list of donations you have given.

Total Given: \$3,129.00

[Donate Now!](#)

Amount	Date	Event	Details	Receipt
\$100.00	11/18/2013	Buddy Row	Type: Event Participant Donation Participant: _____	Download
\$425.00	10/21/2013	_____ Birthday	Type: Personal Campaign Donation	Download
\$300.00	10/21/2013	Clean Water Playpump	Type: Event Donation	Download
\$200.00	10/21/2013	Clean Water Playpump	Type: Event Donation	Download
\$74.00	10/17/2013	Clean Water Ergathon	Type: Event Participant Donation Participant: _____	Download

Alerts

The bell icon on the right end of your toolbar will signal when you have a new notification—such as when you receive a donation or when someone joins your team. Click on the bell to go to your notifications page and view your alert.



FAQs

We know you will probably still have some questions about your Fundraising Portal. Here are some questions we are frequently asked:

Forgotten Passwords

What do I do if I forget my login password?

We have a simple process for creating a new password to get you back in. Just click the Forgot Password link under the Login button, input your email and you will receive an email asking you to reset your password.

Be patient- it can take some time for the email to arrive in your inbox. If you submit the reset password request more than once, the link in the email will become void and no longer work.

Registering Another Participant

Does my Child / family member / friend have to register for the event on their own or can I sign them up?

The ability to register another participant depends on the organization hosting your event. If you can register someone else, you will see a link on your event dashboard to Register Another Participant. The registration process is the same as when you registered yourself except for one major criteria- you must decide if the participant is going to manage their own account or if you will act as manager. Self-managed participants must have their own email that will act as their member name while managed accounts do not.

This is an extremely helpful tool for parents who are registering their children for an event. The parents login with their email and have control over the managed accounts and fundraising pages.

Your Fundraising

[Make a Donation](#)

[Your Fundraising Page](#) ▼

[View Donations Received](#)

[Embed a Badge](#)

Event Information

[View Event Page](#)

[Register Another Participant](#)

[Print Event Info](#)

[Download Resources](#)

Changing Teams

I want to change teams or start my own team - is this possible?

Changing teams is a possibility, depending on the settings of your event. If you see the option to “Change Team Membership” on your Dashboard, you are eligible to switch teams. You can join an existing team, create your own new team or register as an individual, if your event does not require you to be on a team. However, you will not be eligible to change teams if you are currently the captain of the team you are on. In this case, contact your organization and have them assign another team member as the captain - then you will be free to switch.

You can also join another team directly through their Team Fundraising Page. Simply click the “Join this Team” button and select your new role on the team.



Fundraising First Steps

I just registered for an event - where should I begin?

We recommend kicking off your fundraising with a few key steps:

- ▶ Add a profile picture - make it personal!
- ▶ Import your contacts and start sending messages asking people to join your team or give a donation.
- ▶ Connect to your social media accounts and start posting updates about your fundraising cause!
- ▶ Make a donation to your own cause to get that thermometer moving.