Online Fundraising Campaign Guide

WELCOME TO ACTIVE GIVING!

Active Giving is the perfect approach for broadening your fundraising efforts. The campaign management tool is easy-to-use and specially designed to manage your entire fundraising program.

The Active Giving software helps you create customized online donation pages to match the look and feel of your existing website. Once the campaign website is formed, individual and team fundraisers create their own secondary web pages to track their efforts.

Active Giving's success stems from the simple contribution collection process. Fundraisers no longer have to sort through exhaustive paperwork and individual checks. Contributors make pledges online using a credit card and automatically receive immediate email confirmation and a tax receipt email without any orchestration from the fundraiser. The online system tallies all the contributions, dynamically tracks all top contributors and fundraisers, and reports all donation data.

The simple collection process allows fundraisers to spend more time marketing the cause and soliciting donations. The result is the opportunity to generate significantly more money for your campaign. So get started right away!
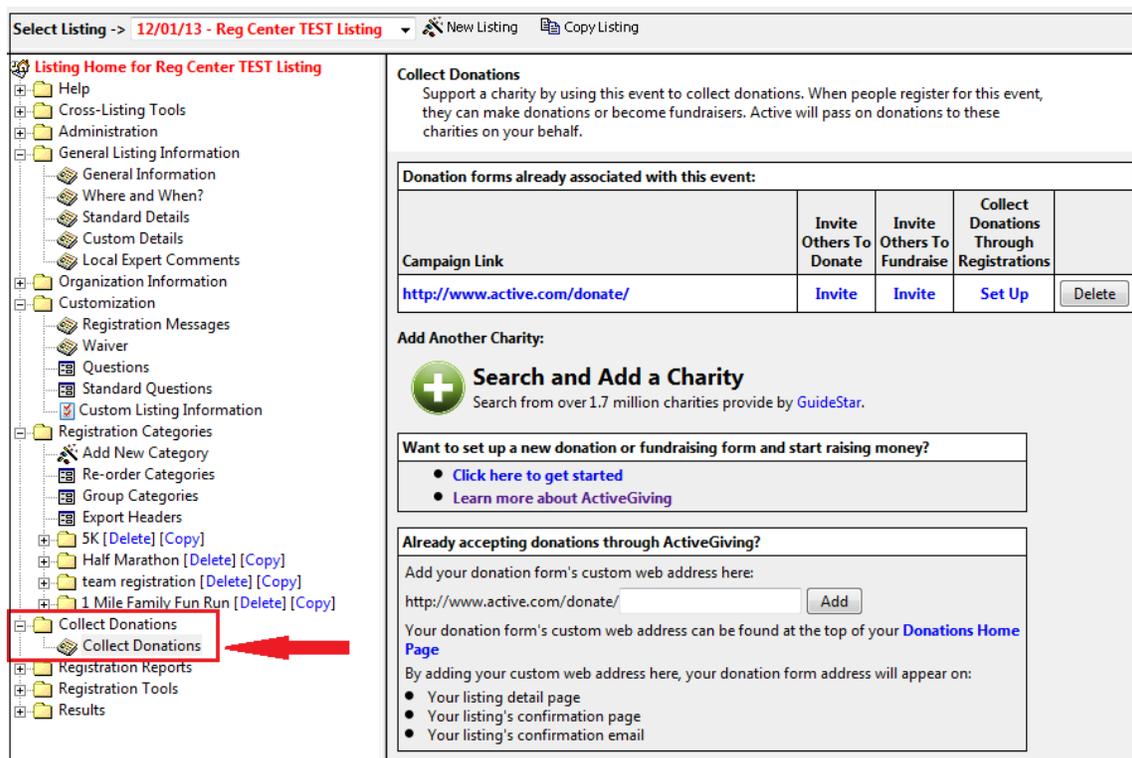
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GETTING STARTED

You already have your event listing set up in the Registration Center, and now you are ready to create your Active Giving Campaign.

If you want to create an Active Giving Campaign page and link it to your event listing in the Registration Center, you would start in the Registration Center on the selected listing. Here you will see the folders on the left hand side; click and open up the folder that is titled "Collect Donations." Once opened, you will see a second link titled "Collect Donations"; please click on that. (*See Screenshot Below*)

Once "Collect Donations" is open, you will see the page refresh and look like the right portion of the above screenshot. This page gives you several options:

OPTION 1: You can associate a campaign page you have already created by entering the web address of the campaign and clicking the ADD button.

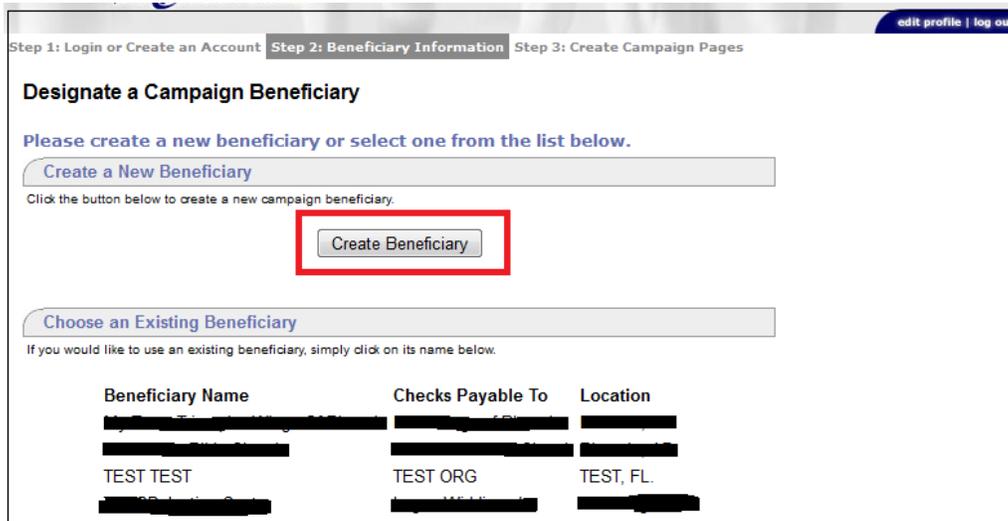**OPTION 2:** You can set up a new donation campaign form and start raising money.

A.   If you have not set up your campaign yet, please click on the blue link that says "Click here to get started" (*See Screenshot Below*)

B. A new page will open, and you will be asked if you would like to create a new beneficiary or use an existing beneficiary you have previously used.

C. **Register or Create an Account**: if you were already logged in to the Registration Center your login will be the same as the one you logged into the Registration Center with.

D. **Setup Beneficiary Information:** This page is used to collect and store all contact and payment information. Please enter your Organization, Accounting, and Contact Information and click Continue.

Note: This information is extremely important because it determines where your checks get sent and the information communicated in all donation receipts.
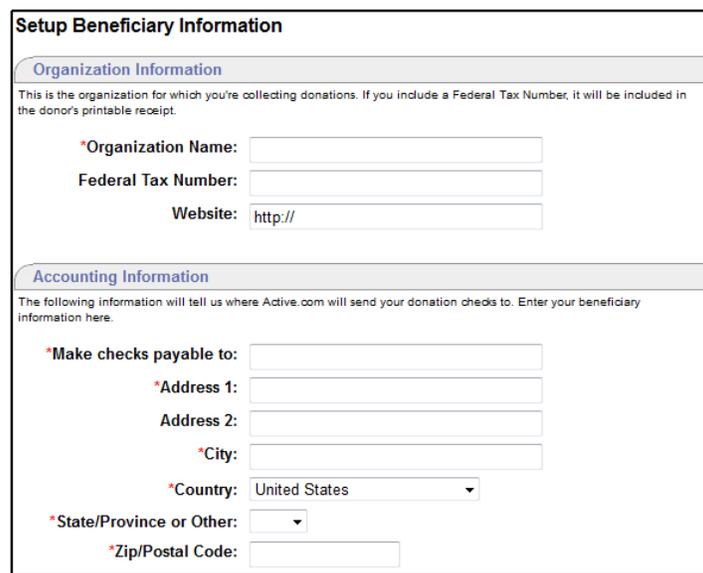
E. **Design Your Campaign Web Page**: here you will create your webpage's title and web address. This page is also where you acknowledge the Service Agreement. Please enter your Campaign Details and consent to the Service Agreement then click Continue.
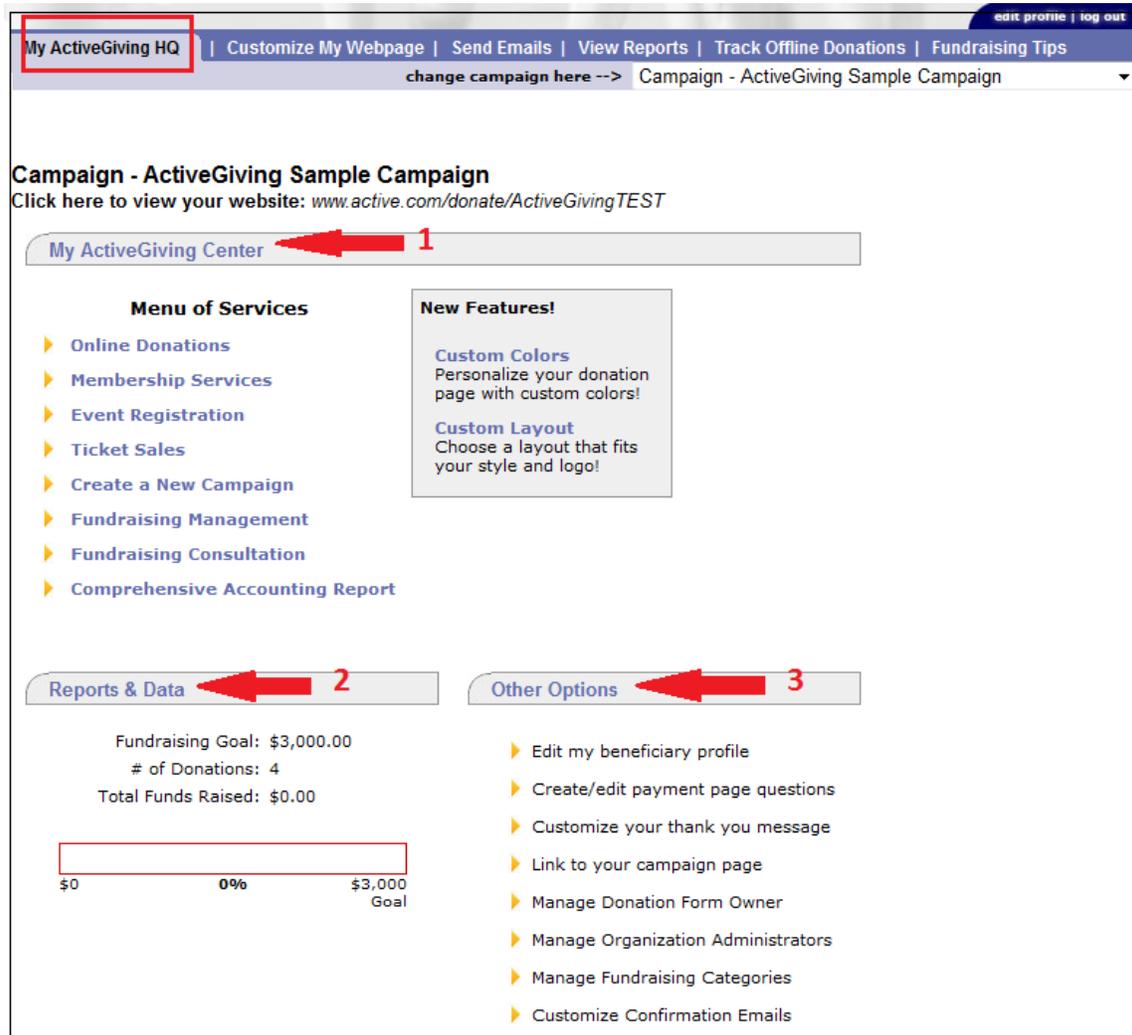
Note: You will be able to return to this page at any time to further take advantage of these customization tools.

F. **Customize Your Campaign Web Page**: On this page you can begin to customize your online campaign, though you are not required to input any information. We strongly encourage you to take advantage of the available tools either now or at a later date. Some of these tools include setting your color scheme, entering a welcome message, creating a fundraising goal and date, etc. Enter as much information as you desire and click Save & Finish at the bottom of the page.

Note: You will be able to return to this page at any time to further take advantage of these customization tools.

Congratulations! You now have an Active Giving Solutions campaign homepage! You can return to this page at any time by visiting www.activegiving.com and logging in with you username and password.

MY ACTIVEGIVING HQ

HINT: *Click on the URL Link below your campaign title to view your campaign site at any time.*

1. **My Active Giving Center** highlights new features and enhancements to the system.
2. **Reports & Data** gives you a snapshot of your fundraising status.
3. **Other Options** provides you with some helpful quick links to customization pages.
   - Update your beneficiary information
   - Create customized payment page questions to collect additional information from your contributors
   - Customize your thank you message to contributors
   - Link to Your Personal Campaign; use this to link up your new site to your organization's homepage

CUSTOMIZE MY WEBPAGE
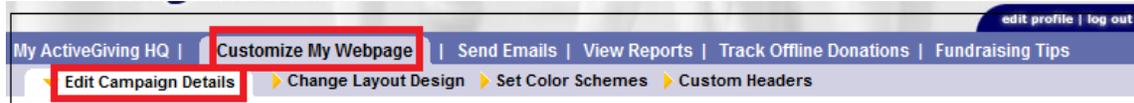
Edit Campaign Details allows you to customize your webpage with as much detail as you would like. These details provide basic structure for your page.

1. Campaign Details
- Tagline: slogan for your campaign or organization.
- Welcome Message: description of your cause, information about your organization, and a personal note to your fundraisers and contributors.

2. Add an Image

- **Upload Images**: a logo or image to personalize your campaign webpage, which will appear on all subsequent fundraising pages tied to this campaign.
- **Share Images**: ability to upload multiple images for your fundraisers to choose from.

Note: Image distorted in preview pane – will not affect webpage image. The image must be in a *.JPG or*.GIF format and cannot exceed 800 pixels in width.

3. Suggest Donation Amounts

- **Donation Amount**: to offer suggested donation amounts, click "New Suggested Amount" and enter the label and amount you want your donors to see. You can create as many options as you would like.

4. Set a Goal
- **Goal Amount**: a dollar amount you would like to raise as a campaign.
- **Goal Date**: the date you want to reach your goal amount.

5. Active Fundraising

- **Allow Fundraisers**: click yes to add a link to your page for individuals and groups to set up fundraising pages on behalf of your campaign.
- **Email me when Fundraisers Join**: click yes to receive an email each time a new fundraiser joins your campaign.
- **Fundraising Text**: a message you would like to appear on all fundraising pages associated with your campaign.

Active Fundraising

ActiveGiving allows people to create fundraising pages through your web page and raise money on your behalf. You can enable or disable this feature. You can also add a customized message that will appear at the bottom of all such fundraising pages.

Allow
Fundraisers: ● Yes   ○ No

Email me when
fundraisers ● Yes   ○ No
join:

Fundraising
Text:

Note - If fundraising pages have already been created, you may prevent additional fundraising pages from being created, but cannot delete/disable your current fundraisers.

6. Display Options

Standard Display Formats
- **Show Total Donations Collected**: click yes to show the total dollar amount raised by your campaign
- **Show Top 5 Contributors**: click yes to show name and amount of top 5 contributors on your campaign webpage.
- **Show Fundraiser Links**: click yes to provide a dropdown box of all fundraiser pages involved in your campaign.
- **Show Top 5 Fundraisers**: click yes to show the name and amount of the top 5 fundraisers on your campaign webpage.

Enhanced Display Formats ~ (All scrolling list displays are limited to the top 75 contributors, fundraisers, or teams. This feature will also only display on the main campaign page, not each fundraiser's page)

- **Display All Contributors as a Scrolling List**: click yes to show all your contributors; in which you can then order by Amount or Name. This supersedes the "yes" answer for showing 5 contributors.
- **Display All Fundraisers as a Scrolling List**: click yes to show all your fundraisers; in which you can then order by Amount or Name.
- **Display Teams as a Scrolling List**: click yes to display all your fundraising teams.

Note: Click Save & Finish at the bottom of the page to ensure all your changes are stored. You can also click "Preview" to see how your modifications have affected your campaign page.

Change Layout Design

Change Layout Design shows you a screenshot of each web page layout option. Click the radio button above the screenshot that best matches your web page needs and preferences.

Note: Click Save & Finish at the bottom of the page to ensure all your changes are stored. You can also click "Preview" to see how your modifications have affected your campaign page.

Set Color Schemes

Set Campaign Colors gives you complete control over the colors and fonts shown on your campaign page. Select a color tile and the palette will show up. If you know the hexadecimal color code you desire, enter the code in the space provided.

- **Color Schemes**: ready prepared color themes for your whole webpage (ex. America, Boot Camp, etc).
- **Preview**: a real time preview of your modifications, but the updates will not be permanent until you save the changes.

Note: Click "Save" at the bottom of the page to ensure all your changes are stored.

SEND EMAILS
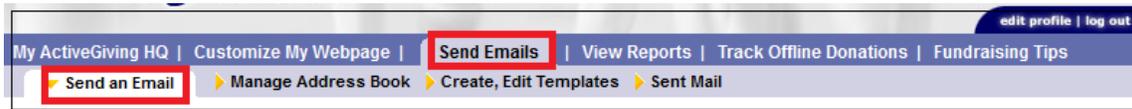
Send an Email

1. To: (Recipient's Email Address): enter the desired recipients' email addresses separated by commas in the box provided or input from your address book.

- **Address Book**: shows you a list of all recipients and email addresses currently saved in your address book. Just check the box next to the name you wish to a send message.
- **Save New Contacts**: check the box to save the inputted email addresses to your email address book.

2. Email Message

- **Template**: use the email template provided in the drop down box for prewritten standard communication messages.
- **Create/Edit Templates**: Click the link to write and save new messages to use in the future. Subject: topic of email message.
- **Your Message**: Use the text box to create a personal message to your fundraisers or contributors.
- **CAPTCHA**: Type in the security code that appears. If you have a difficult time reading the letters / numbers, you can press the "refresh" icon until you get a code you can read.

Note: If you click Send Test Email, you can send the message to yourself. Click Send Email to deliver to your recipients. All emails automatically include a link to your campaign website (this message can also be deleted).

Manage Address Book
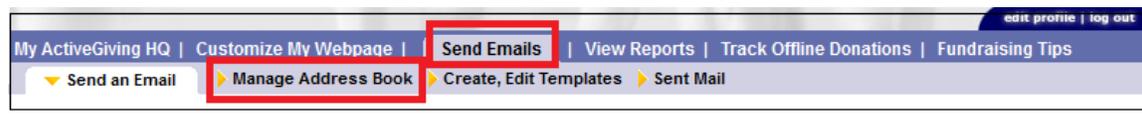
1. Add New Contact Name: Name and email address for new contact.

2. Current Address Book: All current contacts stored in Address Book.

- **Edit/Delete Contacts**: Click the links to update contact information.

Note: *Click "Close Window" to save updates.*

Create/Edit Templates

Allows you to create and save a standard email regarding your campaign cause. The message will be saved in template form for you to access at any time.

1. Create Your Email Template

- **Template Name**: Name used to store email template. Be specific so you can easily distinguish the template in the future.
- **Template Subject**: Stored email subject line automatically inputted when using template.
- **Template Message**: A customized message about your campaign.
- **Share this Template with My Fundraisers**: Check this box if you would like your fundraisers to have access to this template from their email tools.

2. Edit/Copy Email Templates

- All templates are stored in your campaign email tools. All templates can be edited by clicking on the template name and copied by clicking the copy link.
- You can delete your custom templates, but not the two "solicitation email" templates.
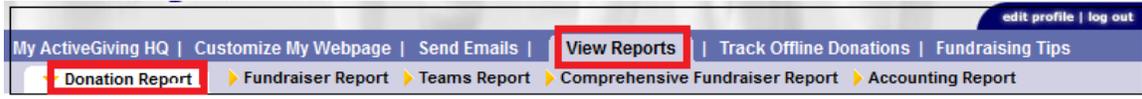

Note: Click Mail Sample to save the template and receive a copy via email.

Sent Mail

Stores all outgoing messages and recipients. Click on any of the bold headings to view more details.

- **Date**: all emails sent out on that date.
- **Subject**: email subject per email sent.
- **Emails Sent**: the number of email recipients in email sent.
- **Delivered**: the number of emails delivered successfully.
- **Undeliverable**: the number of emails that could not be delivered.
- **Pending**: those emails still being processed; to be mailed out.
- **From**: sender's email address.

View Reports

Donation Report

Provides an overall summary of all contributions made to your campaign

1. Donation Summary: a summary of your daily progress, which is updated every half hour.
2. Filter Report: control of your donation report details.
- Date Filters: select dates for specific report data or check Use All Dates to see all your donations to date.
- Donation Types: drop-down box to report online only, offline only, or all donation data.

3. Report Details: the results of the Filter Report listed by contributor.

Note: *All report pages are formatted the same way. Use the above Donation Report page as your model.*

Fundraiser Report
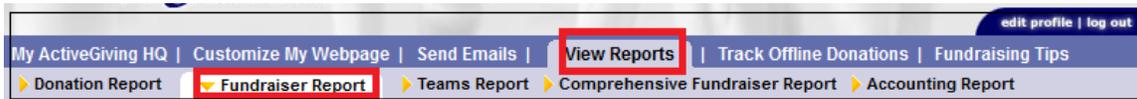
Provides a summary of contributions raised by your fundraisers.

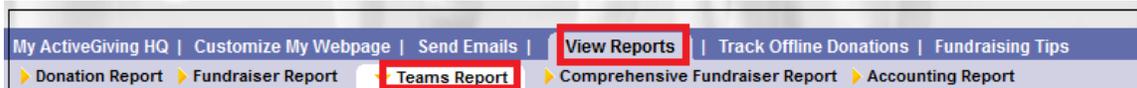**1. Donation Summary**: A summary of your daily progress, which is updated every half hour.
2. Filter Report: Control your fundraiser report details.
- Date Filters: Select dates for specific report data or check Use All Dates to see all your data.
- Donation Types: Drop-down box to report online only, offline only, or all donation data.
3. Donation Details: The results of the Filter Report listed for all fundraisers.
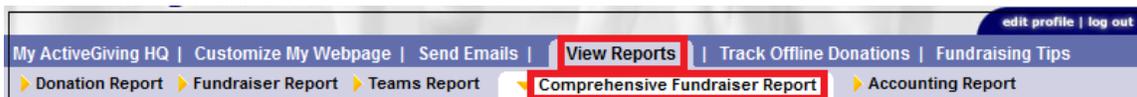
Teams Report

This report is a summary of contributions raised by team fundraiser.

1. Donation Summary: A summary of your progress, which is updated every half hour.
2. Filter Report: Control your accounting report details
- Date Filters: Select dates for specific report data or check Use All Dates to see all your data.
- Donation Types: Drop-down box to report online only, offline only, or all donation data.
3. Donation Details: The results of the Filter Report listed for all fundraising teams.

*NOTE: Only applies if your campaign allows fundraising teams*

Comprehensive Fundraising Report

Provides a list of all teams and all individual fundraisers.

1. Donation Summary: A summary of your progress, which is updated every half hour.
- This will give you a quick look at the total donations of all team fundraisers, all teams, the overall total donation amount, and the average donation amount made.
2. **Filter Report**: Control your accounting report details
- Date Filters: Select dates for specific report data or check Use All Dates to see all your data.
3. Donation Details: The results of the Filter Report listed for all fundraising teams, and fundraising individuals.

Accounting Report
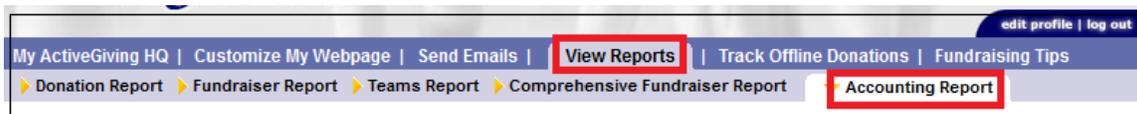
Provides a summary of contributions raised by your fundraisers broken down by online and offline donations; this report also includes net amounts.

1. Donation Summary: A summary of your daily progress, which updates every half hour.
2. Filter Report: Control your accounting report details
- Date Filters: Select dates for specific report data or check Use All Dates to see all your data. This tool also gives you the option to search by payment periods which will help you in reconciling the checks that Active sends out every two weeks.
- Donation Types: Drop-down box to report online only, offline only, or all donation data. Please note that if you are trying to reconcile your checks, make sure to pull reports for online donations only.

3. Donation Details: The results of the Filter Report listed for all fundraisers.

TRACK OFFLINE DONATIONS

Detailed Offline Donations
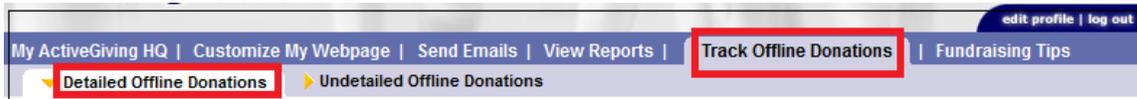
Allows you to enter detailed information on contributions received offline in the form of cash or checks. If this capability is not something you would like your individual fundraisers to have, you do have the ability to remove this tool from their pages.

1. Offline Donation Details: Donor information for contributors who have submitted cash or checks.
2. Offline Donations List: All offline donations by name and amount.

Undetailed Donations

Enter a dollar amount given by offline contributors without specifying name, address, etc.