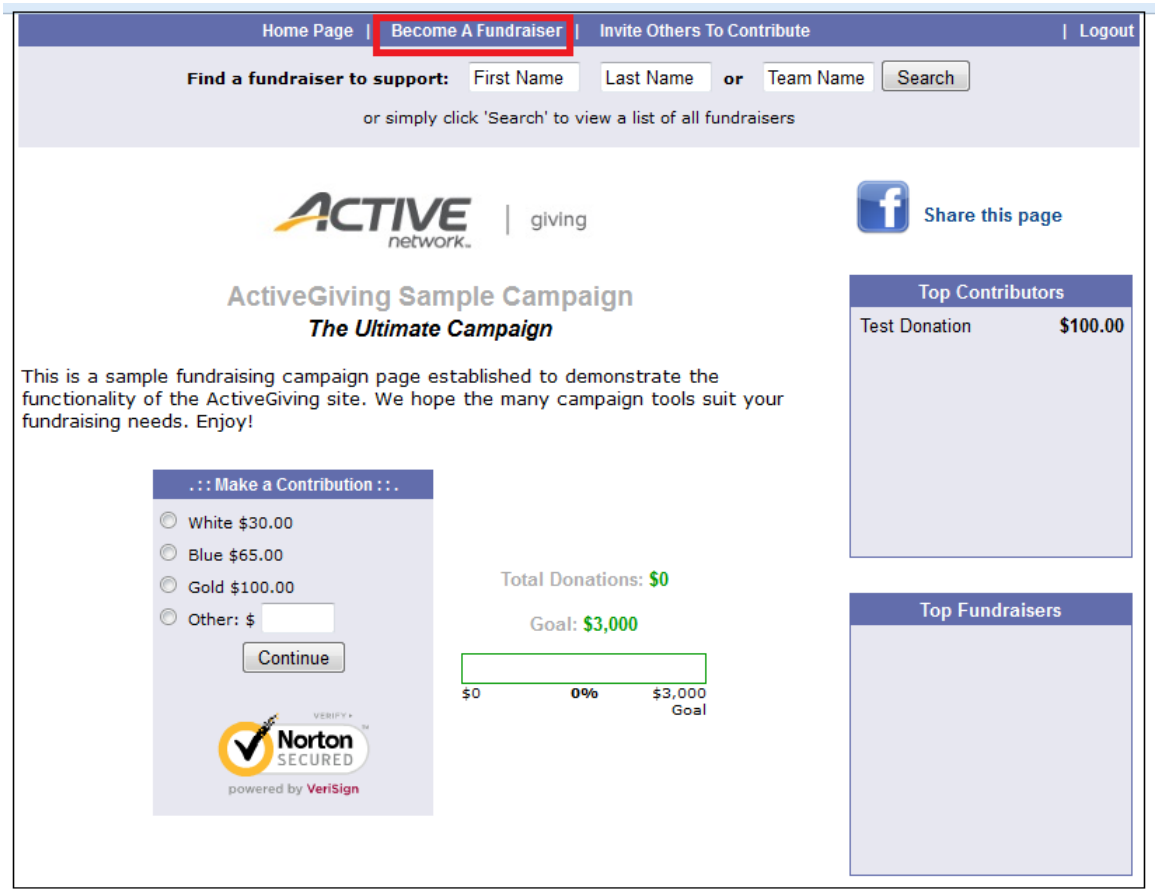
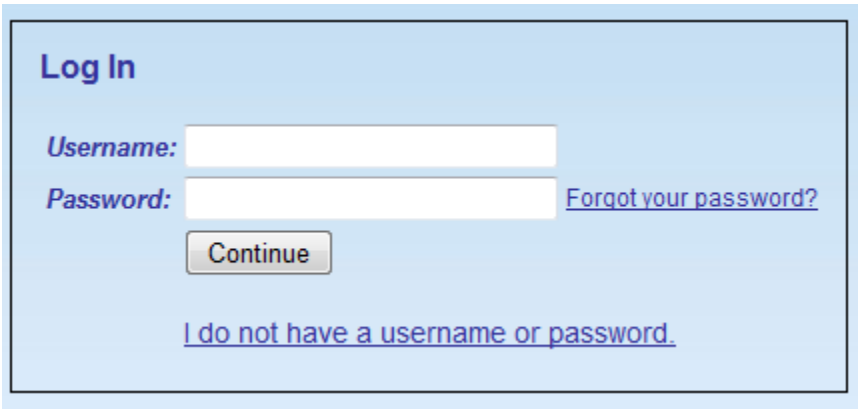
How to Create a Fundraising Team

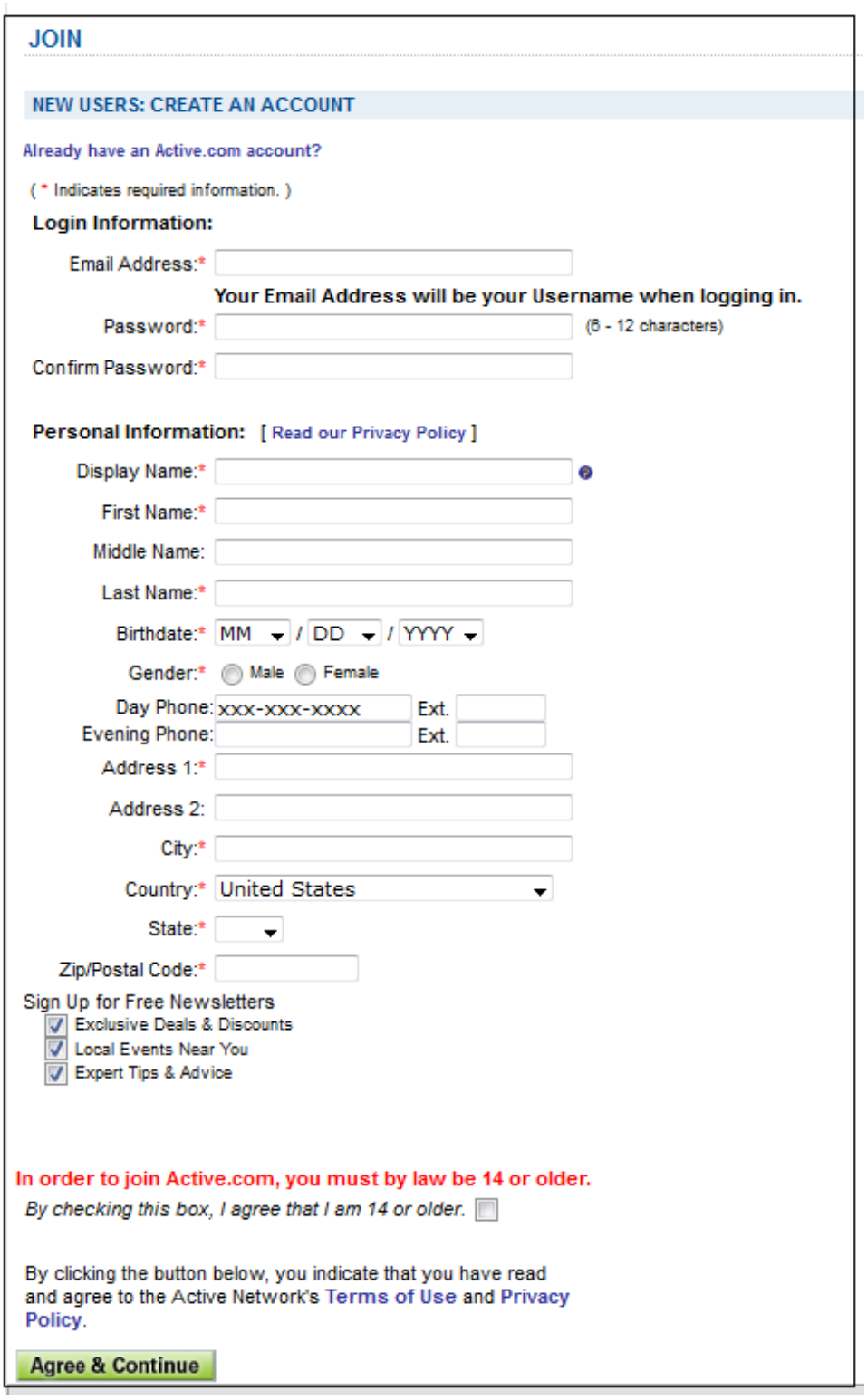
1. Go to http://www.active.com/donate/"organizationname" (please note this is not a real link and you should receive the link to your organization during registration)
2. Click on "Become A Fundraiser"
3. Click on "Create a Fundraising Team"



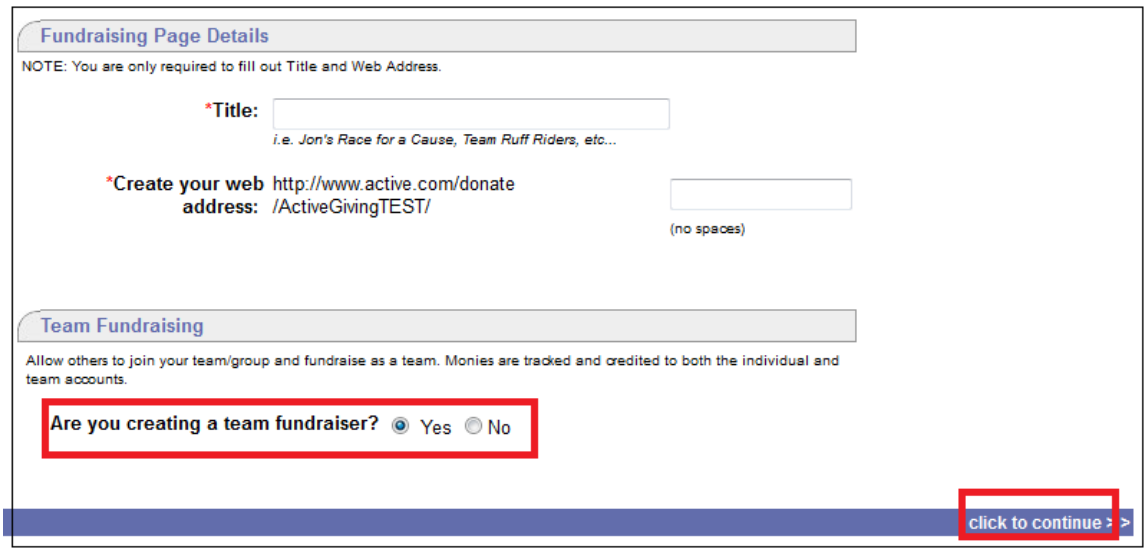
3. Login with your username & password or create an account!



4. Create an account if you do not already have one.

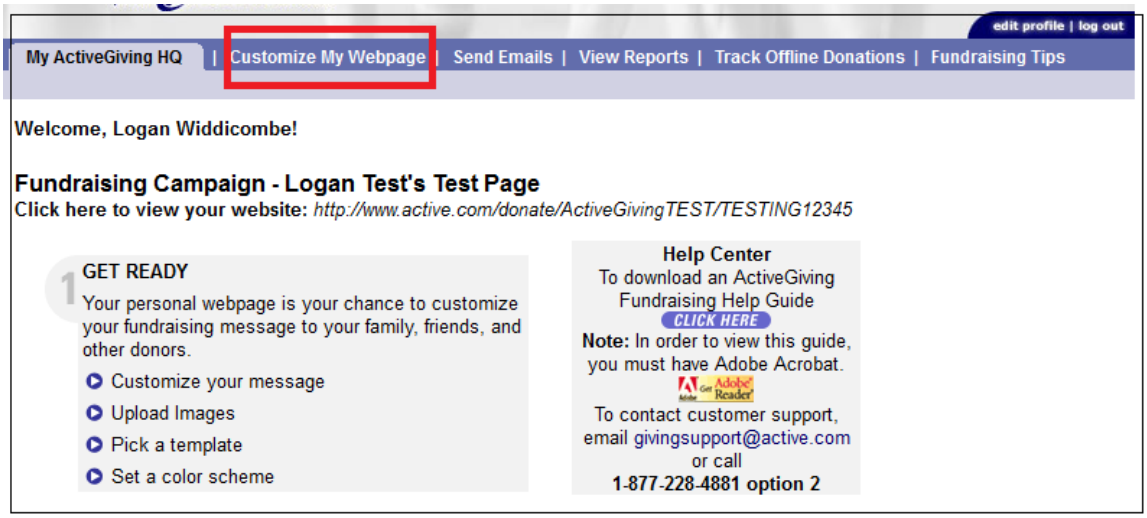


5. Create Your Team Fundraising Page

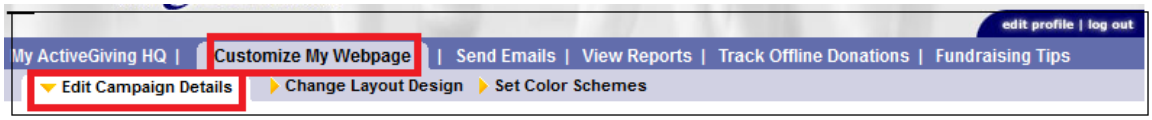


Getting Started

1. To begin personalizing your page, click on Customize My Webpage



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 fundraising page.

1. Enter your Fundraising Campaign Details

- ***Tagline***: slogan for your fundraising campaign.
- ***Welcome Message***: description of your personal involvement in the fundraising cause and a note to your contributors.

2. Add an Image

- ***Upload Images***: a logo or image to personalize your fundraising webpage (*Note: Width cannot exceed 800 pixels).

3. Set a Goal

- ***Goal Amount***: a dollar amount you hope to raise.
- ***Goal Date***: the end date to your fundraising program.

4. Display Options

- ***Show Total Donations Collected***: click yes to shows the total dollar amount you raised.
- ***Show Top 5 Contributors***: click yes to show the name and amount of your top 5 contributors.

Note: Click Save & Finish to ensure all your changes are stored. You can also click Preview to see how your additional information affects your campaign page before you save your changes.

Change Layout Design shows you a screenshot of each webpage layout option. Click the radio button above the screenshot to best match the needs of your webpage.

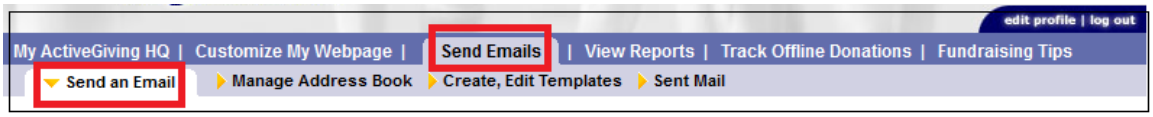
***Note**: Click Save & Finish. You can also click Preview to see how the additional information affects your campaign page.*

Set Color Scheme gives you complete control over the color and font shown on your campaign page. Select a color tile and the palette will show up. If you know the HTML design color you desire, enter the HTML color code in the space provided.

1. ***Color Schemes***: ready prepared color themes for your whole webpage.
2. ***Preview***: shows you real time changes, but the updates will *not* be made until you save the changes.

Note: Click Save & Finish 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 addresses from your address book.
2. ***Save New Contacts***: check the box to save the email addresses entered to your email address book.

Email Message

3. ***Template***: use the email template provided in the drop down box for prewritten standard communication messages.
4. ***Create/Edit Templates***: click the link to write and save new messages to use in the future.
5. ***Subject***: topic of email message.
6. ***Your Message***: use the text box to create a personal message to your fundraisers or contributors.

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. ***Import Your Email Addresses***: import all your email addresses from Outlook or a *.csv file (*Note: If you click the "Click Here" link, a Wizard will pop up and give you step-by-step instructions on how to import your email addresses).
3. ***Current Address Book***: all current contacts stored in Address Book.
4. ***Edit/Delete Contacts***: click the links to update contact information.

Note: Click Close Window to save updates.

Create/Edit Templates

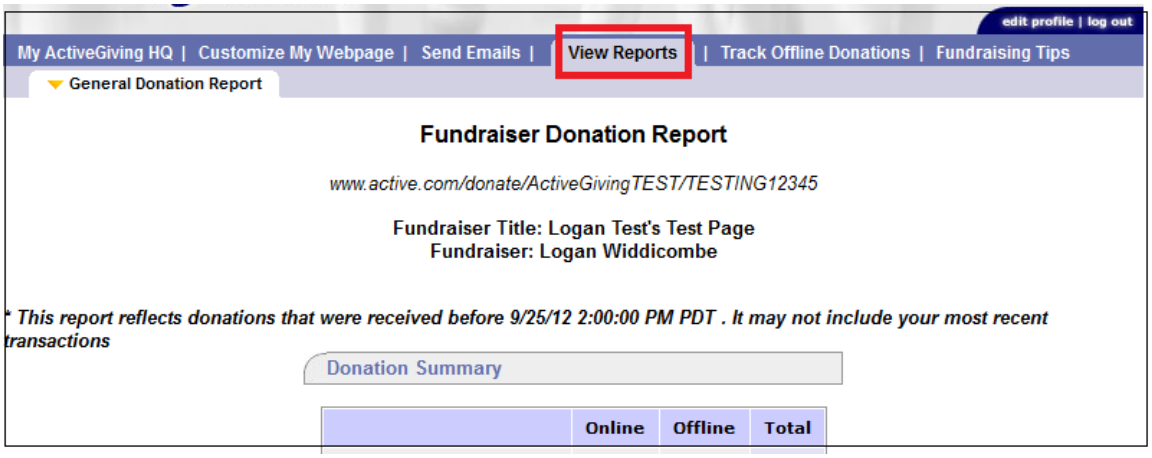
1. ***Template Name***: name used to store email template. Be specific so you can easily distinguish the template in the future.
2. ***Template Subject***: stored email subject line to be automatically imputed into your emails when using template.
3. ***Template Message***: enter a customized message about your fundraising campaign.

Edit/Copy Email Templates shows all templates stored in your campaign email tools. All templates can be edited by clicking on the template name and copied by clicking the copy link.

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 sent email to view ***Date, Subject, Emails Sent, Delivered, Undeliverable, Pending, or Details*** of your sent mail.

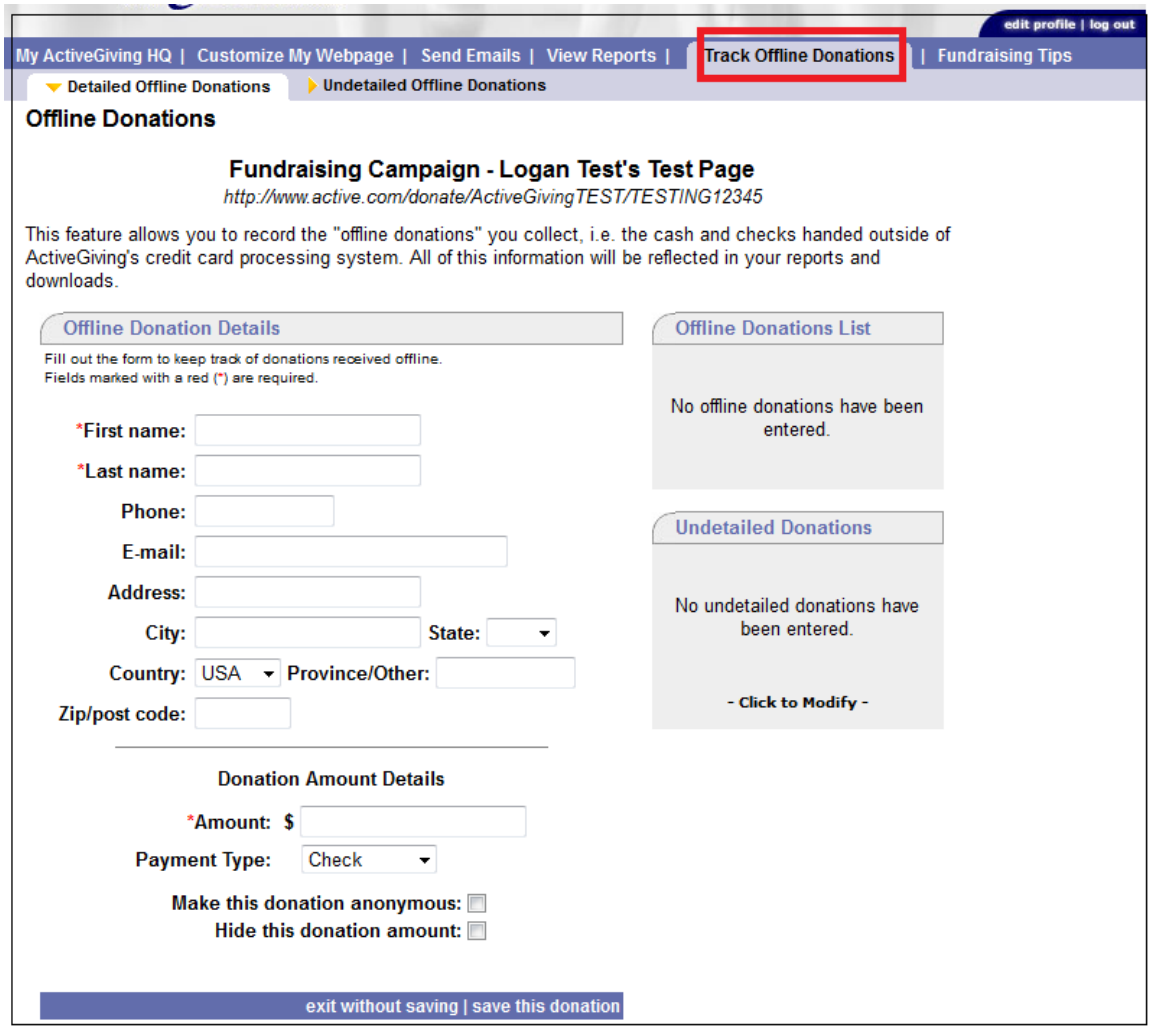
VIEW REPORTS



General Donation Report

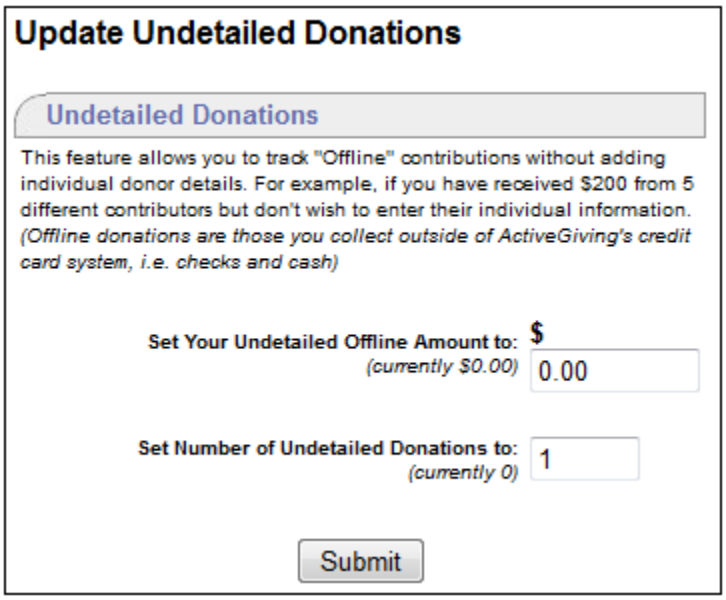
1. Donation Summary: a real time summary of your daily progress.

TRACK OFFLINE DONATIONS



Detailed Offline Donations

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 Offline Donations allows you to enter the dollar amount given by offline contributor without specifying name, address, etc.

tips FOR SUCCESS

Setting up your online account at ActiveGiving is the first step to supercharging your fundraising efforts. Based on our experience, we've learned it only takes a few simple steps to ensure a successful campaign. Here are a few tips:

CUSTOMIZE AND PERSONALIZE YOUR PAGE

Your personal webpage is your chance to customize your fundraising message to your family, friends, and other donors. Generally speaking, people contribute to your cause based on the personal message you convey. Therefore, it is important to spend time customizing your ActiveGiving page.

- **Include a Message**
- **Upload Images**
- **Pick a Template** to best match you logo
- **Use Colors** to personalize your page

Remember, a more compelling site leads to better results!

Note: Once you've logged in to your ActiveGiving account, click the 'Customize your donation page' link to personalize your page further.

HAVE A PLAN, AND STICK TO IT

The most effective way to achieve your fundraising goal is to create a detailed plan outlining the steps you'll need to complete in order to meet your objectives.

- **Set a Goal**
- **Start Early** so you can give people ample time to donate.
- **Educate your Donors** on your cause
- **Stress the Benefits** of contributing
- **Follow Through** by sending emails
- **Send Thank You notes**
- **Ask BIG** before going small
- **Stay Positive** and remember the reason
- **Never Feel Guilty** about asking for donations
- **Ask, Ask, Ask**

Remember, sticking to your plan will ensure success!

Note: Once you've logged in to your ActiveGiving account, click the 'Invite others to donate' link to send and save emails to your contacts

PROMOTE THE AVAILABILITY OF YOUR DONATION PAGE

Make sure people realize how easy it is to donate online. Your webpage and emails give people an immediate link to donating. They won't have to fill out a form, copy down postage information, or write a check. They also automatically receive a confirmation email with tax deduction information.

We hope you enjoy your ActiveGiving account! We also wish you lots of luck with your campaign. As always, your feedback is welcome and encouraged. We would love to learn more about what works best for you!

EMAIL IS KEY

Email is the key to a successful online fundraising campaign because dynamic links in your email letter offer donors direct access to your fundraising page. You also catch the donor online and at the computer so they can immediately contribute at the point of interest. Most importantly, email allows you to reach all of your family and friends without the hassle of postage, returned mail, and bounced checks. So make your email campaign count!

Email Tips and Guidelines

Here are some tips and guidelines for writing an effective email:

- **Make it Personal**
- **Use Humor** to gain donor interest
- **Keep It Short**
- **Ask** and make expectations clear
- **Educate Donors** on your cause
- **Provide Suggested Donation Amounts**
- **Set a Deadline** for donations
- **Include the Web Address** for your fundraising page

Email Tracking

Make sure you keep a record of all your solicitation emails and a list of the recipients. This will help you follow-up and send reminder emails in an organized manner. Also, remember to send thank you emails to show your appreciation!

Try Asking These Contacts

Spouse or Significant Other	Co-workers	Roommate
Mom	Boss	Aunt
Dad	Coach	Uncle
Sister	Teacher	Cousins
Brother	Doctor	Grandma
Best friend	Dentist	Grandpa
Friends	Vendors	Neighbors