

A-Team Fun Walk for Autism URL - http://www.assew.org/ateamfunwalk

As a registered participant of this event, you have a variety of tools at your fingertips to help you reach your goals! Your fundraising center (your personal page) will be the hub for managing your involvement and fundraising activities.

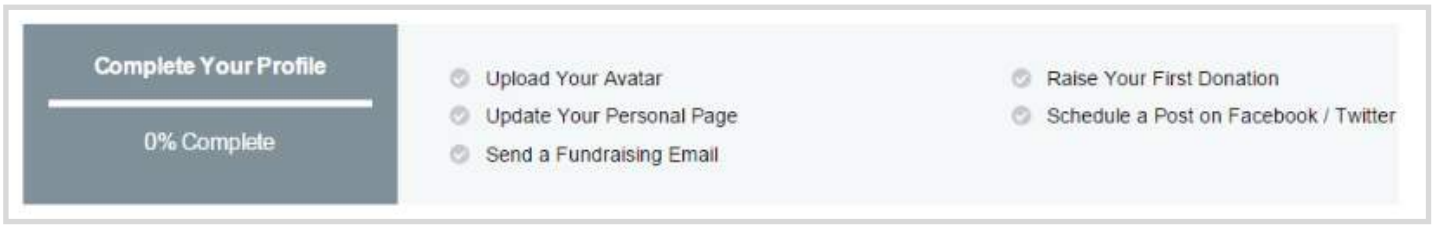


Getting Around

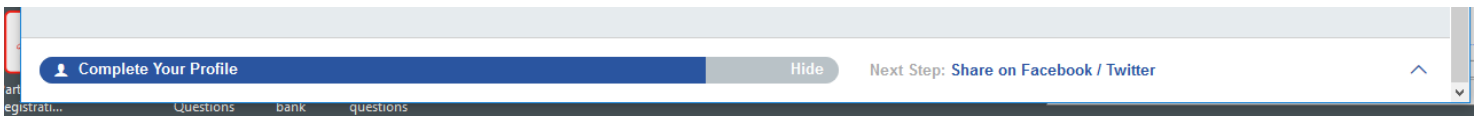
Once you complete registration, you'll automatically be logged in and able to access your **Fundraising Dashboard**. Once logged out for the first time, you'll want to access the **Event Home Page** in order to try logging back in. You can do so by hovering over the **Log In or Sign Up** area in the top right of the screen. Here, you'll enter the credentials you created during registration. If you can't remember your password, click the **Forgot your password?** link to the right of the **Log In** button, where you'll be able to enter your email and generate a reset password email. If you forget your username, you can either reference your initial registration email or contact sue@assew.org and she will be able to assist you.

HINT: Usernames are always email addresses.

You'll be prompted to begin the **Welcome Quest** as soon as registration is completed. The Welcome Quest is designed to help walk you through the main components of your Fundraising Dashboard. As a bonus, **you'll receive a badge upon**

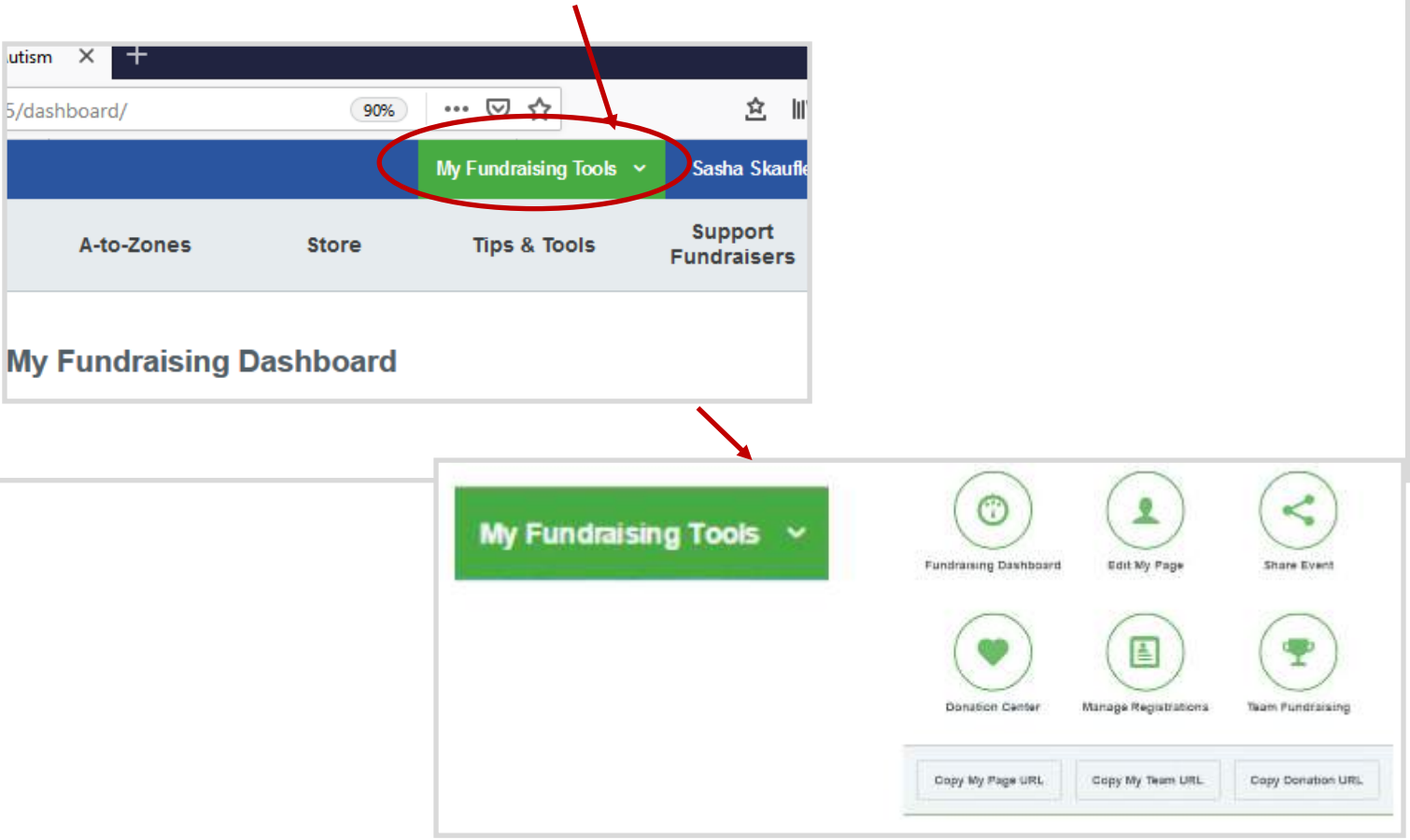


completion. All Welcome Quests are different, but here's an example of what you may see after registration. To get started, on your dashboard, click on one of the Welcome Quest items and the system will guide you through it from there.



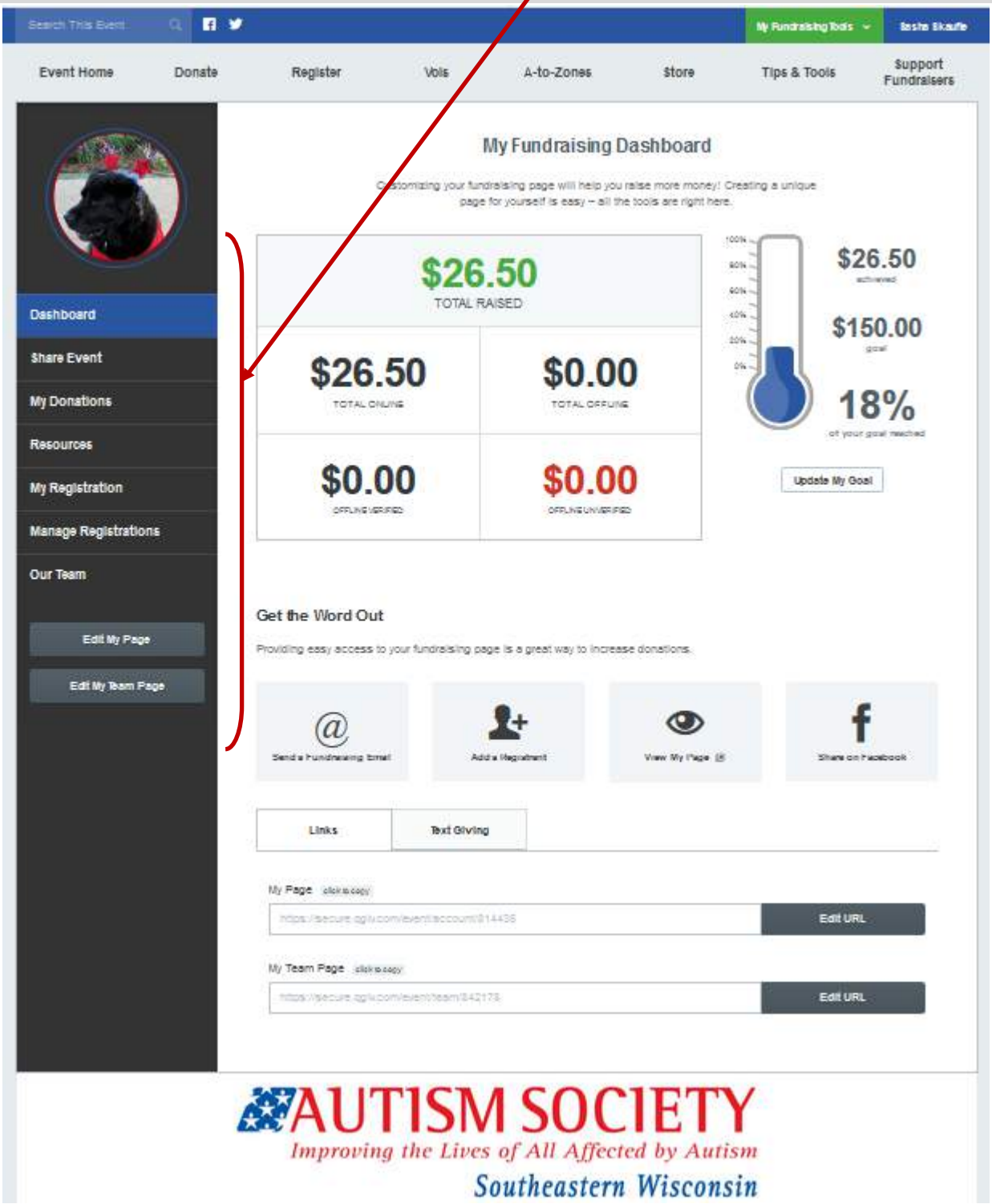
My Fundraising Tools

You can navigate to all areas of your Fundraising Center and copy URLs for your personal/team fundraising pages, as well as your personal donation page, from this dropdown.



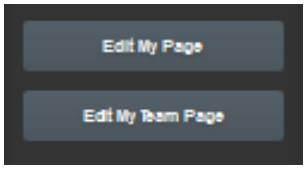
Fundraising Dashboard

You may also navigate between the different areas of your fundraising center via the **Navigation Bar** on your **Fundraising Dashboard.** You'll see a menu down the left side that contains the same navigation items as your My Fundraising Tools dropdown, along with a few additional options/pieces of information.



First up is your Personal Avatar. The avatar will be used on your personal fundraising page and throughout the system on activity feeds such as leaderboards, recent activity feeds, etc. By default, the avatar contains your initials. To upload an alternate image, hover over the current default and click the Change Profile Image area. You can access and change your personal avatar even if you navigate to a new area of your fundraising dashboard; it will always be displayed above the menu along the left side.





Edit My Page will shortcut you to the content management system, allowing you to customize the look of your fundraising page. If you are a team captain, you may Edit My Team Page from here as well.

My Page will show you your fundraising page URL and allow you to Edit URL if you're interested in appending something to the end. You can use the Click to Copy button to copy the URL to your clipboard and then paste it wherever you'd like to use it. When you send emails from the templates we've provided - links back to your page are automatically added. If you create custom emails, you'll want to include one or both of the URLs below to lead donors back to you. **Use caution if you add an ending to the URL. If you change the URL after you've already posted links to your page, the links will be broken**



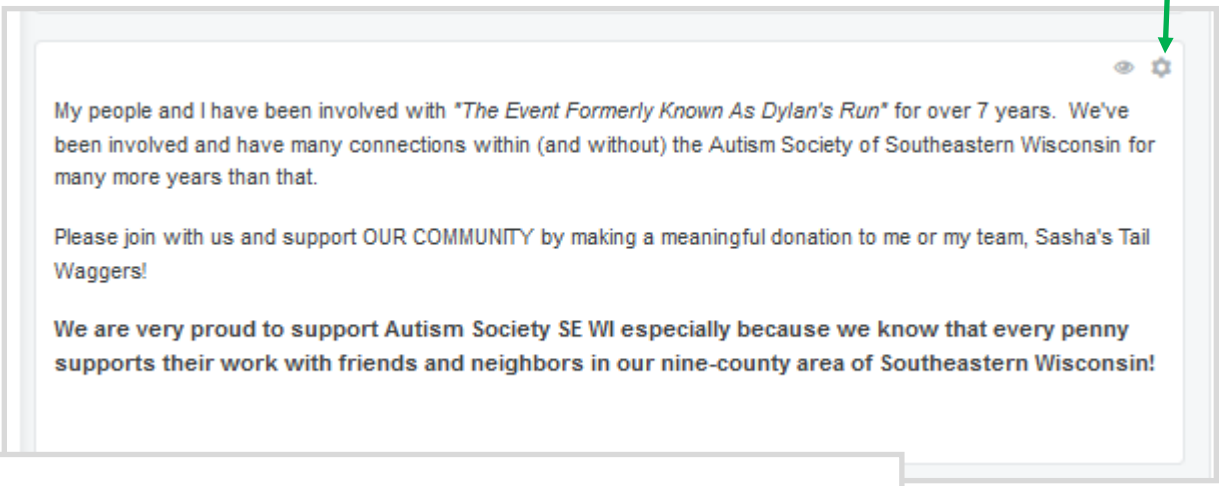
Your Fundraising Dashboard includes your thermometer, which displays how much you've raised thus far, your individual goal, and the percentage of your goal you've currently raised. You're able to update your goal by clicking the Update My Goal button below the thermometer. Why not raise it higher? You can do it!



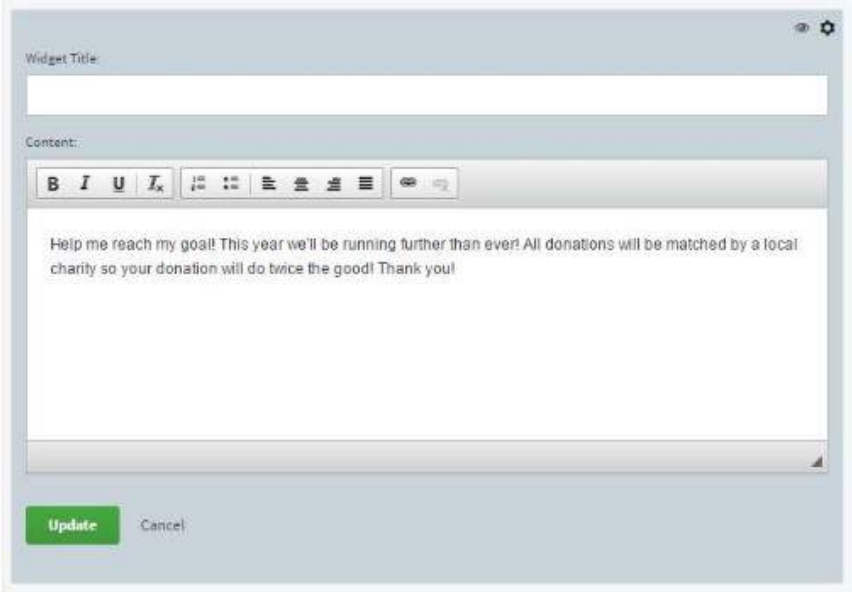
To the left of the thermometer is your fundraising table, which breaks down the types of donations you've received. This makes for easy tracking!

Edit My Page

In this area, you can customize your personal fundraising page. Your ability to customize different areas of your page is managed by the nonprofit organizing your event. If you're unable to edit or move certain widgets, it's more than likely because your admin has not enabled this functionality. After you click the Edit My Page button you'll see a number of boxes that allow you to customize your page. These boxes are called widgets. To edit a widget on your page, click on the gear icon in the top right-hand corner of the widget. Each widget will provide a variety of options allowing you to edit the look and feel, along with the content, that's displayed. After making your changes, click the **Update** button. **Make sure to click Save Page when you're done.**



Edit mode:



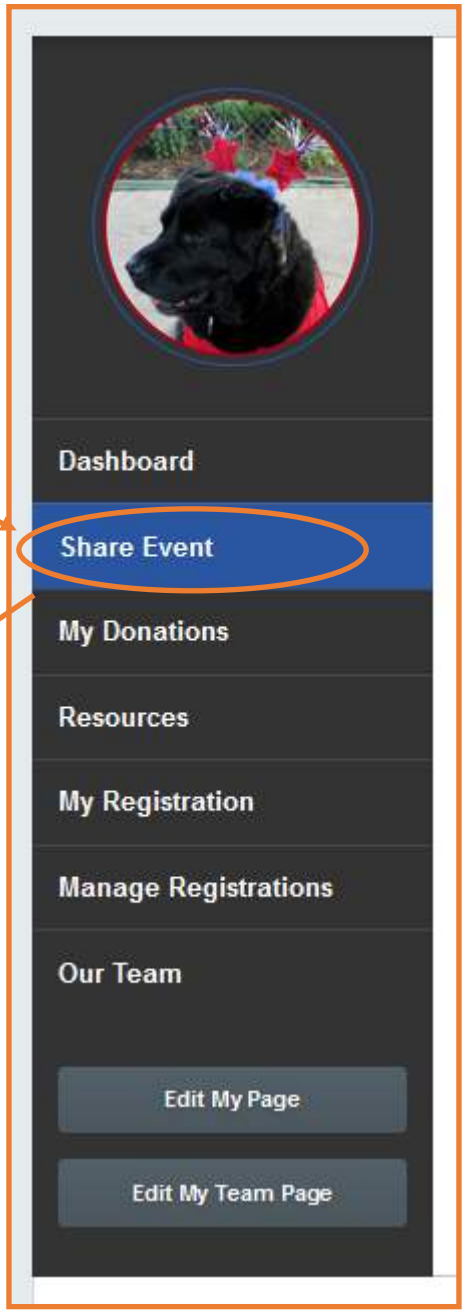
Make sure to click the **Save Page** button when you're finished.

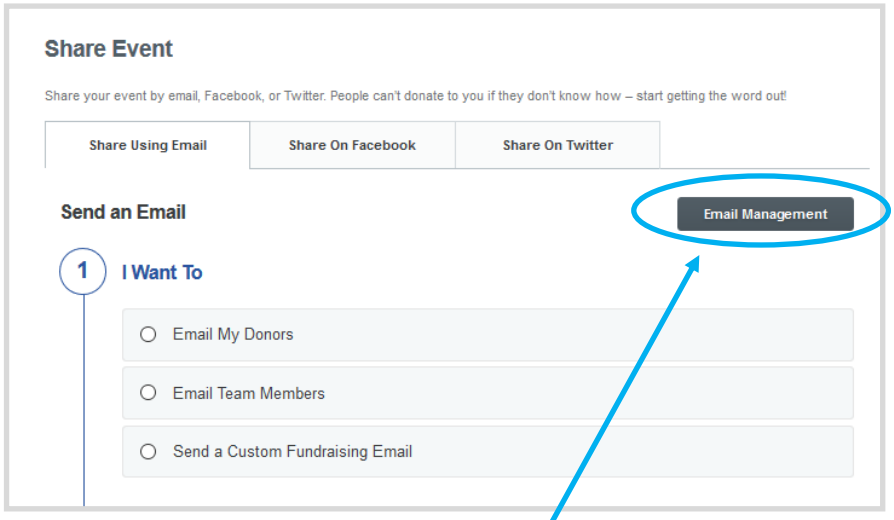


Undo Changes will undo anything that you've not yet saved, and **Reset Page to Default** will take the page back to the default settings defined by Autism Society Southeastern Wisconsin.

SHARE THE EVENT!

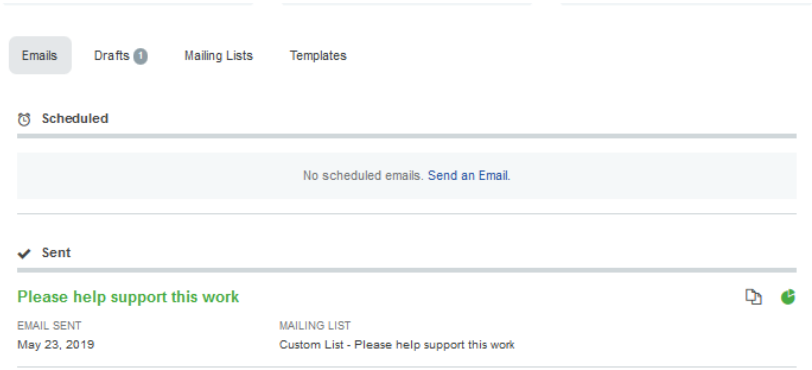
Earn more donations by sharing your event with friends and family! In this tab, you're given the tools to share the event and your personal and team pages via email and social media.





Share Using Email

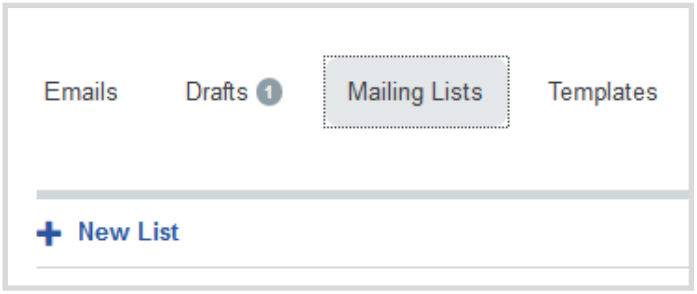
The **Share Using Email** tab allows you to create mailing lists and emails you can schedule or send immediately. You're able to create your own templates or use any that we have set up for you. To display the Emails, Drafts, Mailing Lists, and Templates tabs, click the Email Management button.



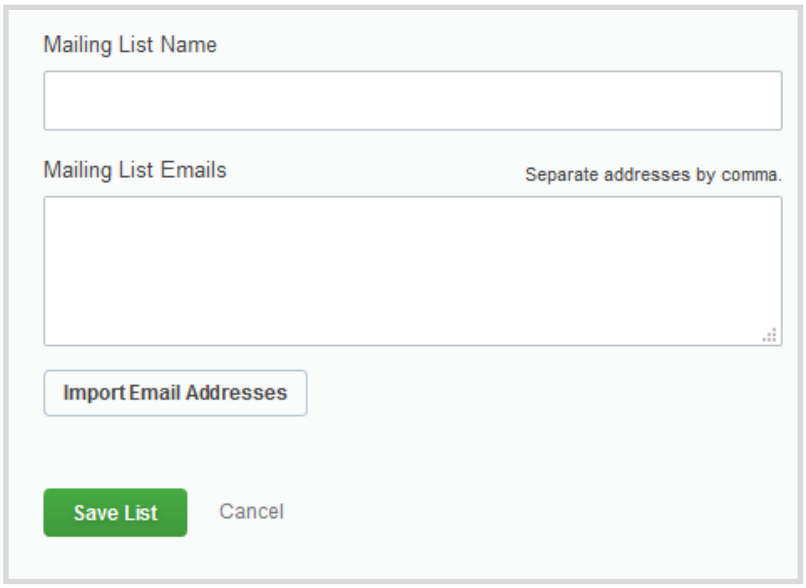
If you're just getting started, you'll probably want to create a new mailing list filled with your own personal contacts. If you'd like to bypass this step, you're able to enter email addresses as part of the email creation process.

Creating a Mailing List

Click the Mailing Lists tab and choose + New List.

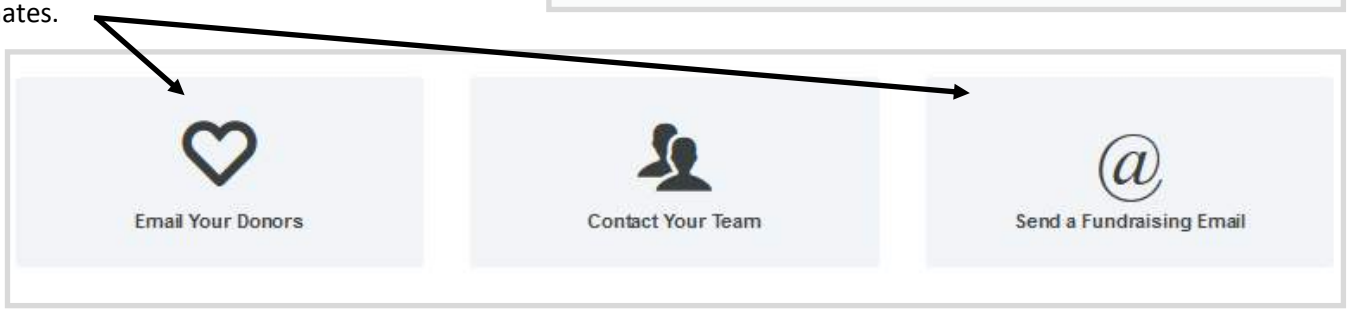


From here , you'll be able to enter a name for your list to make it easy to find in the future, and enter or import your desired email addresses. Building the mailing list is easy; just enter your email addresses in the Mailing List Emails box, **separated by a comma,** or click on the **Import Email Addresses** button. Once you've completed your list, you should click **Save List** to continue.



Creating an Email

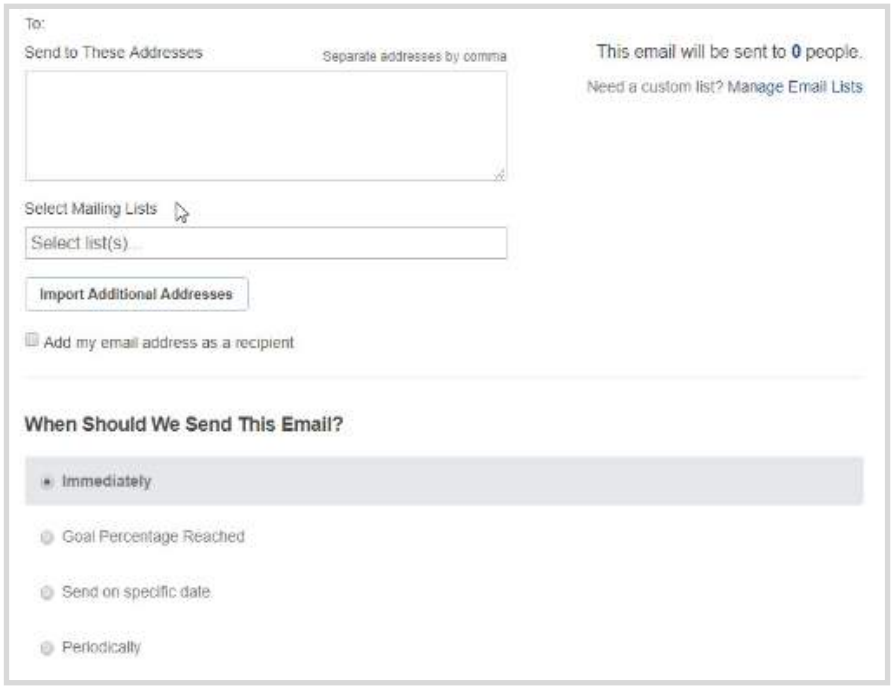
Step 1 is to choose if you want to email your donors or send a fundraising email. Click the corresponding button. If you're part of a team, you'll also see an option to email your teammates.



You may or may not see all of the above options. This will depend on if you have any donors at the time you're sending the email and/or if you're part of a team. If you choose **Email My Donors**, you'll be able to email anyone who has made a donation to your page. If you choose **Email Team Members**, you'll be able to email any of your current team members. After choosing your email type and entering a title, you can **select a template from the Choose Template drop-down**, if desired. This drop-down will include any predefined templates provided to you by the admin and/or any templates you've created in the templates area of your fundraising center. Once you choose a template, the Your Message section of this area will be populated with the content and can be modified as you wish. If you don't wish to start with an existing template, you can choose to skip that drop-down and create your own unique content in the Your Message section.

You'll have the flexibility to choose an existing mailing list, import email addresses, or use the Additional Emails box to enter emails manually. The system will display how many people the campaign is being sent to as you add emails and mailing lists.

Next, you'll define recipients for your message, along with when you'd like the email sent. You'll see four options listed. You can create and send the campaign immediately, or choose one of the other three options that will schedule the campaign to send once the parameters outlined are reached.



Goal Percentage Reached will allow you to define a percentage of your goal you'd like to be reached before the system would trigger the email to be sent. To use this option, click on the blank space in the sentence "Send my schedule when I've reached ____% of my goal" and enter your desired percentage.

Send on specific date will allow you to define a date and time to send the email if you're not interested in sending it immediately.

Periodically will send the same email multiple times based on what you enter here. You have the ability to send on a daily, weekly, or monthly frequency, and you also have the ability to add a start date.

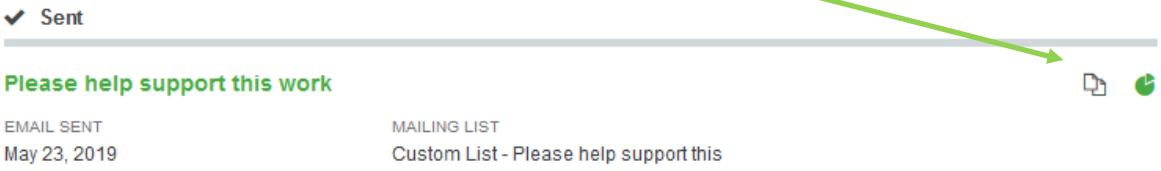
When you're happy with your email, you can click the **Save & Preview Email** button to do just that. If you're not quite done and would like to save your work and come back later, click the **Save as Draft** button.



If you need to make additional changes after the preview, click the **Make Changes** button, which will direct you back to the previous screen. If you're happy with what you see, you'll want to click on the **Send Email** button to either send or schedule the campaign based on your preferences during initial setup.



The **Emails** tab of the **Email Management** section will list all scheduled and sent emails for you to view. From this screen you can edit or delete any of your Scheduled emails by choosing the edit pencil or the red X to delete. For any emails that have been sent, you'll see two additional icons. **Clone and Resend**, which looks like two piece of paper, will allow you to make a copy of the email and resend it. You're able to make any modifications you want to make with this option before sending. You'll also see a small green icon that looks like a pie chart, which will allow you to view statistics on your campaign.

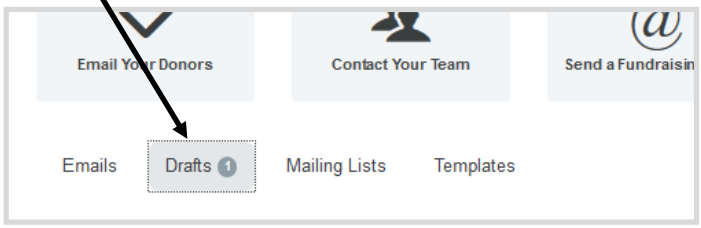


Any email that has been saved as a draft and not scheduled or sent will be housed in the **Drafts** tab of this interface with the ability to edit or delete the current content.

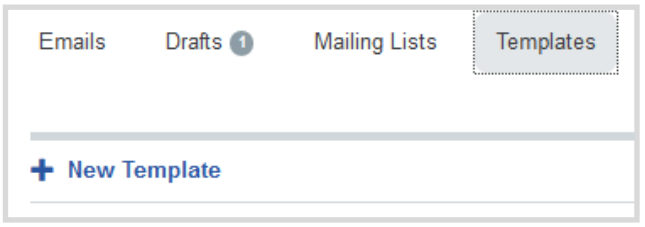
Scheduled or Sent



Drafts

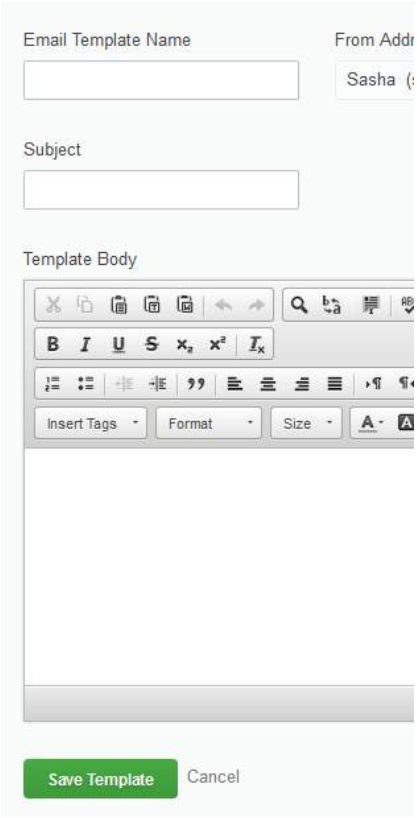


Creating Templates



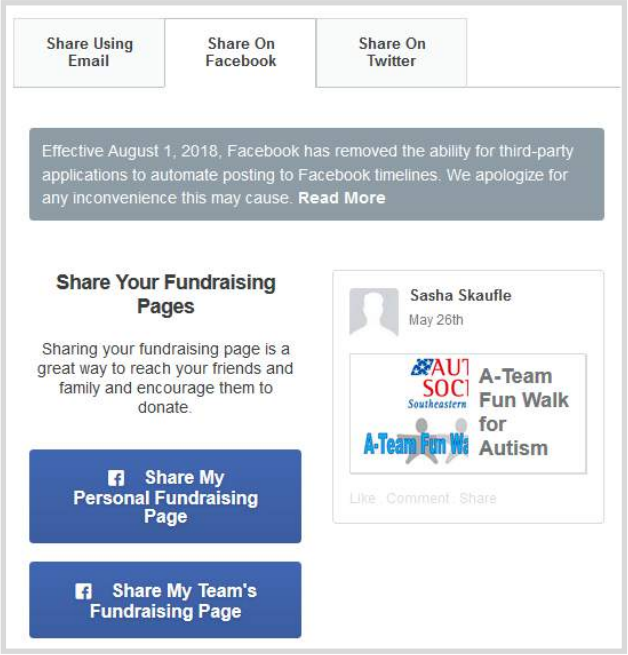
If you'd like to create your own email templates for use within campaigns, you're able to create and manage these in the Templates tab in the **Email Management** section of **Share Event**. Creating your own template is easy!

You'll click on the +New Template button and enter a Template Name, along with a Subject and Body content. Once you're happy with what you've entered, click the Save Template button at the bottom of the body content box.



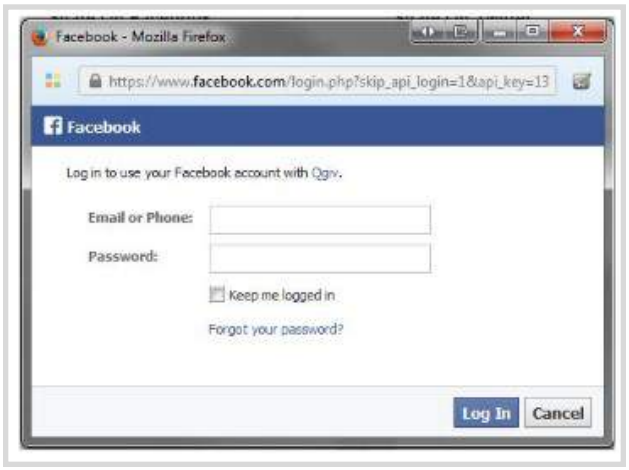
Once saved, these templates will be available in the template drop-down within the campaign creation screen and available for you to use immediately.

Share on Facebook



You can use the Share on Facebook tab to connect your personal Facebook page to your fundraising center. You will notice a gray dialog box informing you that Facebook will not allow automatic postings as in the past. You are still able to share and get your network of friends & family involved—it just isn't the automatic process as it was in the past.

Connecting with Facebook is a great way to reach your network of family and friends to spread the word. This tool allows for manual and automatic posting to make sharing much easier. In order to allow the fundraising center to interact with your personal Facebook page, you MUST connect your Facebook account. In this tab, you'll see a large blue button inviting you to do so. If you happen to be logged in to Facebook within your browser, you'll be automatically connected. If you're not logged in, a Facebook dialogue box will pop up and ask you to sign in with your Facebook credentials. It should look something like this, depending on the browser you're using:



If at any time you'd like to Disconnect from Facebook, click the button available to you at the top of the tab once connected. It will look like this:



Creating a New Facebook Post

Your admin may have post templates you can use or modify, rather than having to create brand new posts.

*They are not available yet but will be released within the next few weeks.

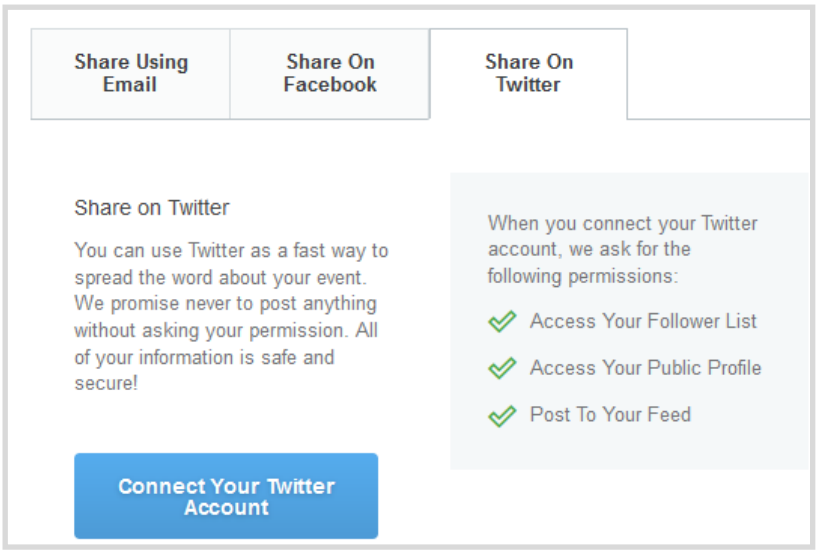
Sp, at this point you'll need to just create a new post.

To Create a New Facebook Post, first fill in the **Post Name.** This will be the title for your post and will be saved for easy recognition. Next, you'll select the link you want to share. You can share your Personal Page, the main Event Page, or if you are on a team, your Team Page. Once you choose which link to share, you'll need to choose **Manual** posting as automatic posting has been discontinued by Facebook.

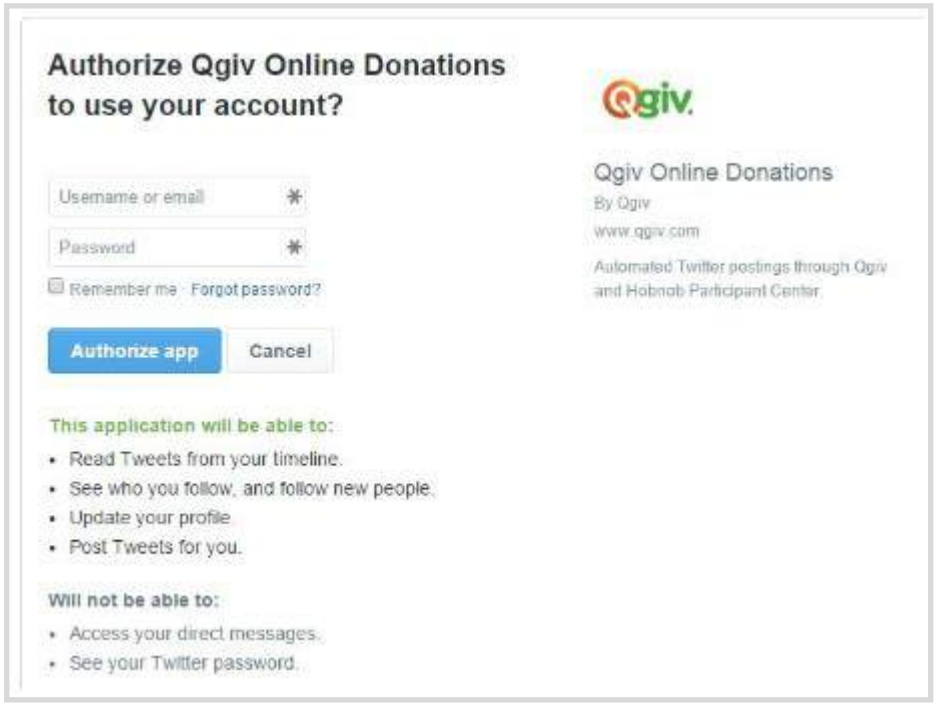
When you are happy with your post, don't forget to **Post** the message.

Share on Twitter

You can use the **Share on Twitter** tab to connect your personal Twitter account to your fundraising center. Connecting with Twitter is a great way to reach your network of family and friends to spread the word. This tool will allow for manual and automatic posting to make sharing much easier. In order to allow the fundraising center to interact with your personal Twitter page, you MUST connect your Twitter account. In this tab, you'll see a large blue button inviting you to do so. If you happen to be logged in to Twitter within your browser, you'll be automatically connected.



If you're not logged in, a Twitter dialogue box will pop up and ask you to sign in with your Twitter credentials. It should look something like this



If at any time you'd like to Disconnect from Twitter, click the button available to you at the top of the tab once connected. It will look like



Creating a New Tweet

Your admin may have post templates you can use or modify, rather than having to create brand new posts.

*We do not have any Twitter templates yet but will have some available within a few weeks. Please stay tuned.

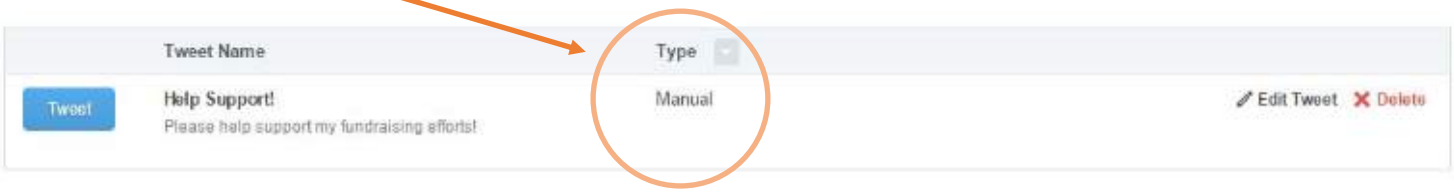
You'll just create a new post.

To Create a New Tweet, first fill in the Post Name. This will be the title for your post and will be saved for easy recognition. Next, you'll select the link you want to share. You can share your Personal Page, the main Event Page, or, if you're on a team, your Team Page. Once you choose which link to share, you 'll determine when you want this particular post to be shared on Twitter.

Your options are as follows:

Manual:

The Manual option allows you to create posts, save them in your fundraising center, and use the blue Post button to post those to your Twitter feed whenever you'd like. This option is the only option that will not be automatically posted for you.



Goal Percentage Reached:

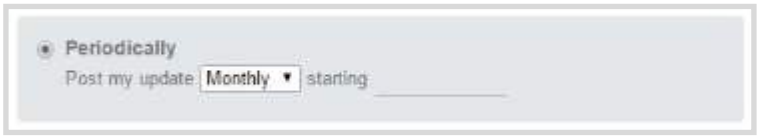
This option will allow you to define a percentage of your goal you'd like to be reached before the system would trigger the message to be posted. To use this option, click on the blank space in the sentence "Send my schedule when I've reached ____% of my goal" and enter your desired percentage.



Send on a specific date will allow you to define a date and time to tweet. This option will tweet the message on the desired date just the one time.



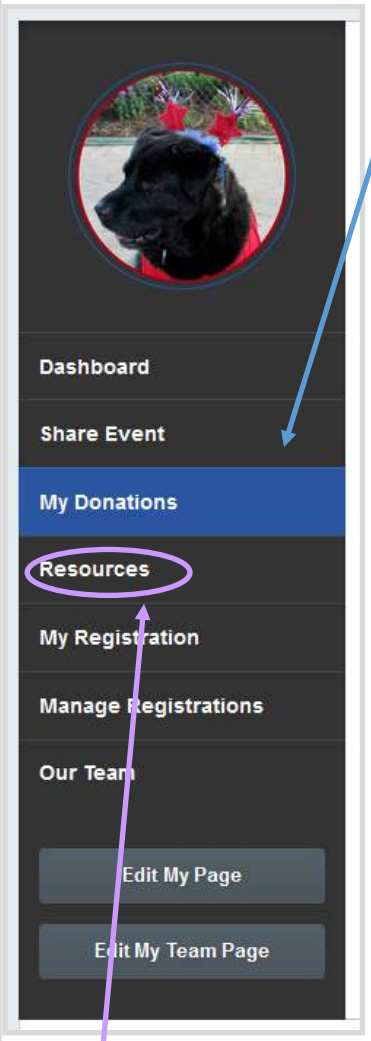
Periodically will tweet the message multiple times based on what you enter here. You have the ability to tweet on a daily, weekly, or monthly frequency, and you also have the ability to add a start date.



Once you pick when you want to tweet, you'll create the content of your tweet. As you begin to create your tweet, you'll see a preview to the right. You also have the ability to insert tags to personalize your message. These can be inserted from the Insert dropdown you see in the Post Message box. Once you're happy with your post, click the blue **Schedule Tweet** button.

My Donations/Donation Center

This is the area you can visit to monitor your progress. All of your donation activity is housed here for your review.



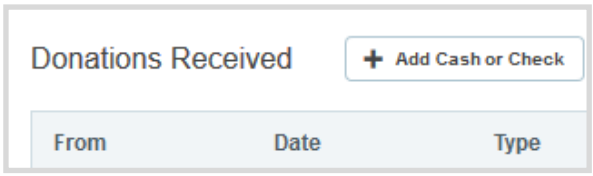
Updating Your Goal

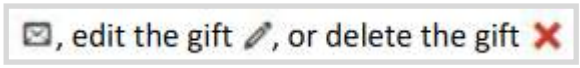
If at any time you'd like to make a change to your fundraising goal, you can do so in this area. You'll see the **Update My Goal** button right below your thermometer that you'd click, enter your new goal, and save.



Adding an Offline Gift

If you have a cash or check donation to add, click the + **Add Cash or Check** button and enter the information for your donor. You can classify the gift as a check or cash gift. If it's a check gift, you can also record the check number for your records. In the **Donor Information** section, the First and Last Name or Company Name, if it's a Company Donation, are required. All other fields are optional. If you choose to enter an email address, a thank you message will be sent directly to your donor once you click the **Save Donation** button at the bottom. Any offline gifts you enter will be listed in your Donations Received table with their current status and the ability to resend the thank-you email , edit the gift , or delete the gift .

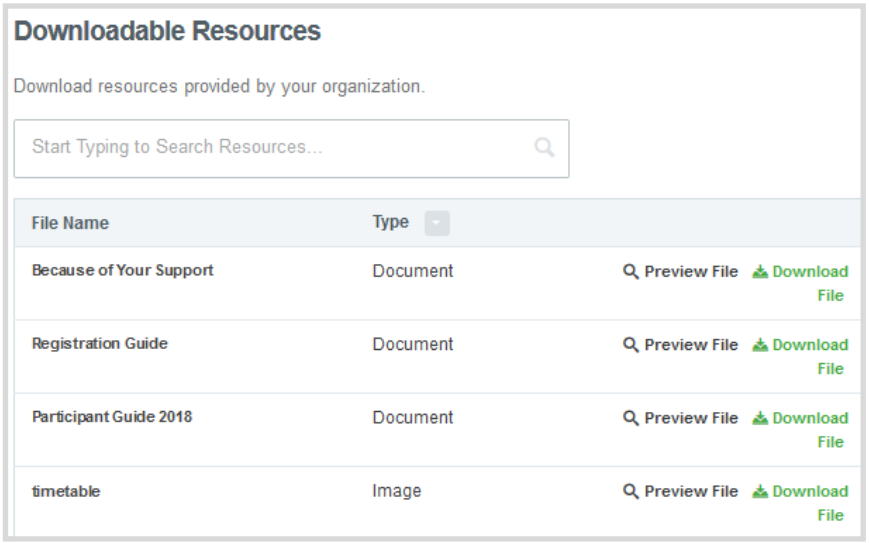




The donation will show on your thermometer as "Unverified" until you deliver it to the Autism Society office. Once turned in there the donation will be processed and your thermometer will show the donation(s) as "Verified".

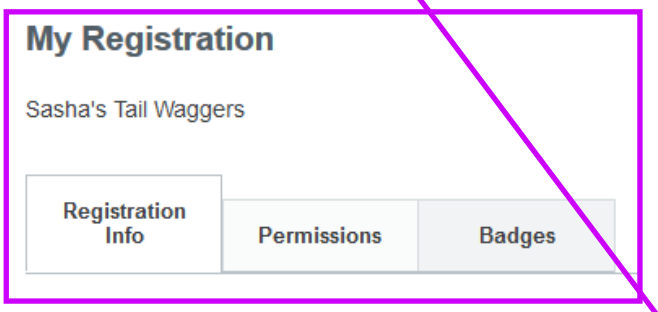
Resources

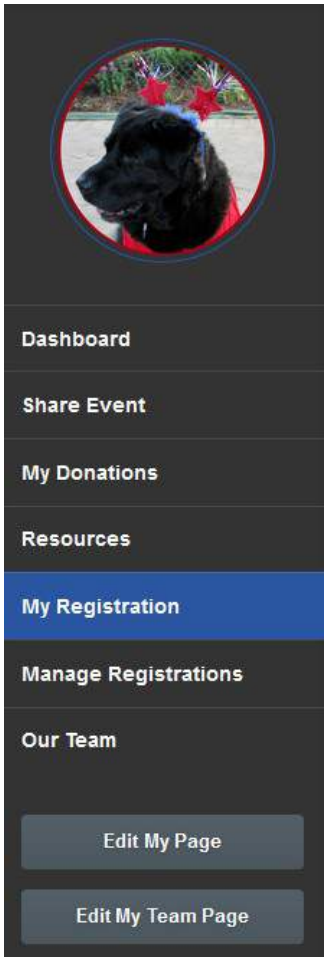
Autism Society SE WI has uploaded a few resources for your use. There is a Registration Guide, this Participant Guide, and a great flyer for you to send out to your prospective donors. It is called "Because of Your Support" and depicts just a few samples of the work the Autism Society of Southeastern Wisconsin does. There will be more resources to come over the next few weeks. You will receive an email update whenever a new resource is added. You can preview and/or download any of the resources you'd like to use.

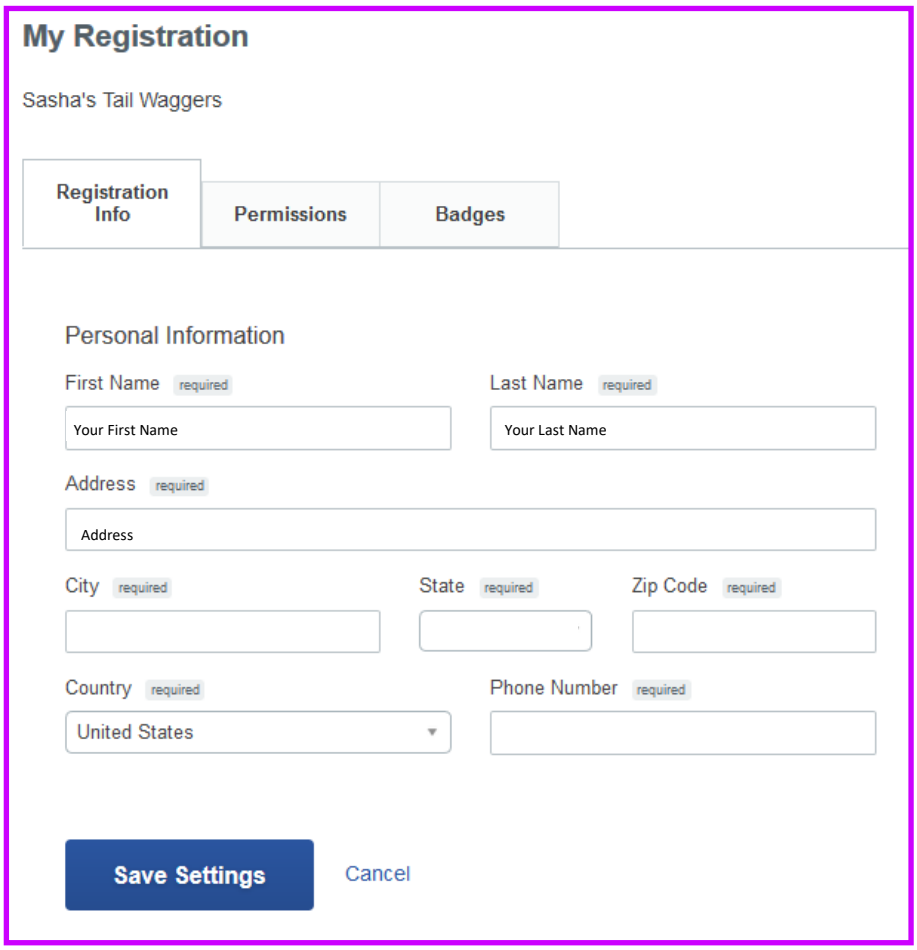


My Registration

This is an area where you can manage your registration information, manage permissions, and access the badges area by using the tabs along the top of the window.





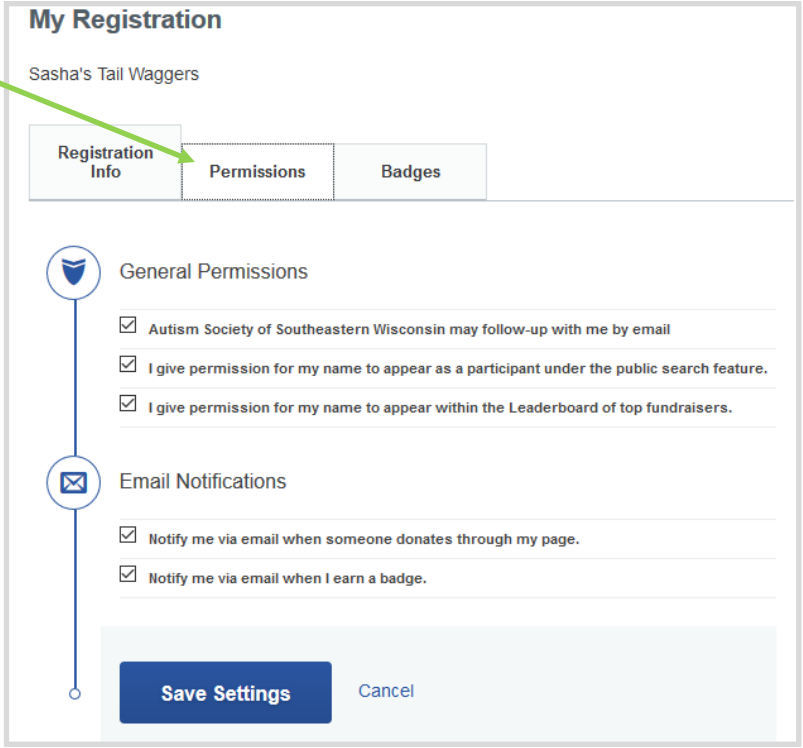


In the **Registration Info** tab, you'll see your Personal Information, which may be updated if needed. If you're part of a team, you'll see the name listed here, as well. Once you make any changes to these areas, you'll need to click the **Save Settings** button at the bottom of the page

Permissions

We recommend that you do not change these default settings.

The next tab is where you'll manage your Permissions.



General Permissions

This is where you can manage permissions for the following:

Being followed up with via email. Don't forget that we need to be able to reach you regarding changes in the event!

Appearing in the search feature throughout the event site. If you decline permission then donors cannot search and find you to donate to you.

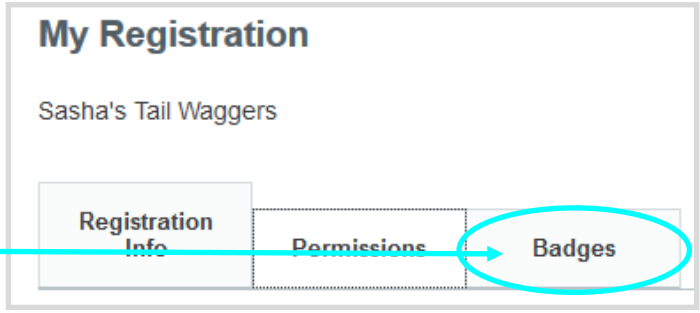
Appearing in the leaderboards as a top fundraiser if you qualify. Bragging rights don't count if you can't show it!

Email Notifications

This is where you can manage email notifications for the following:

Someone donating through your page.

Receiving a badge.

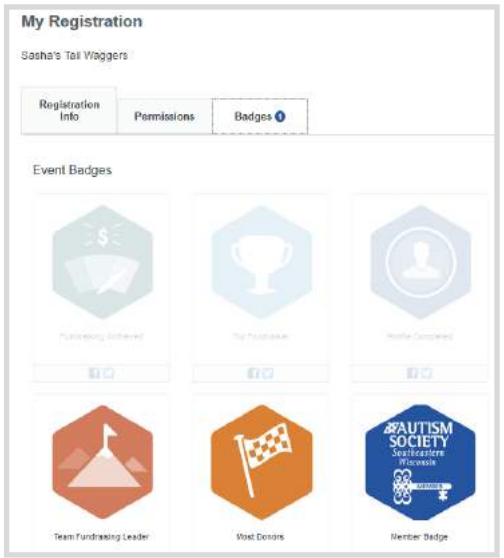


Badges

We are pretty excited about this feature new to us this year!

Here, all badges you're capable of earning will be displayed, but grayed out. You can hover over any of them for a description of how you would earn the badge.

Any badges you've earned will be in full color and provide the ability for you to share your achievement on Facebook or Twitter. You can share by clicking on the Facebook or Twitter icons located within the box of the badge achievement you'd like to share. A dialogue box will appear for you to add a message before sharing.

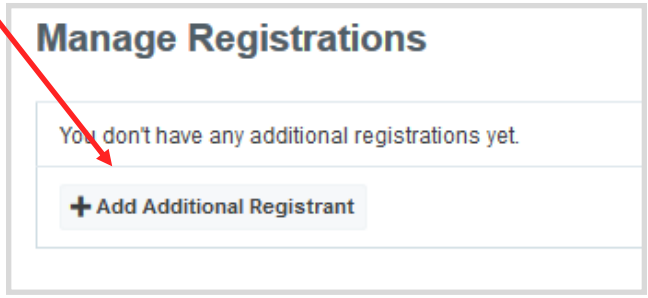


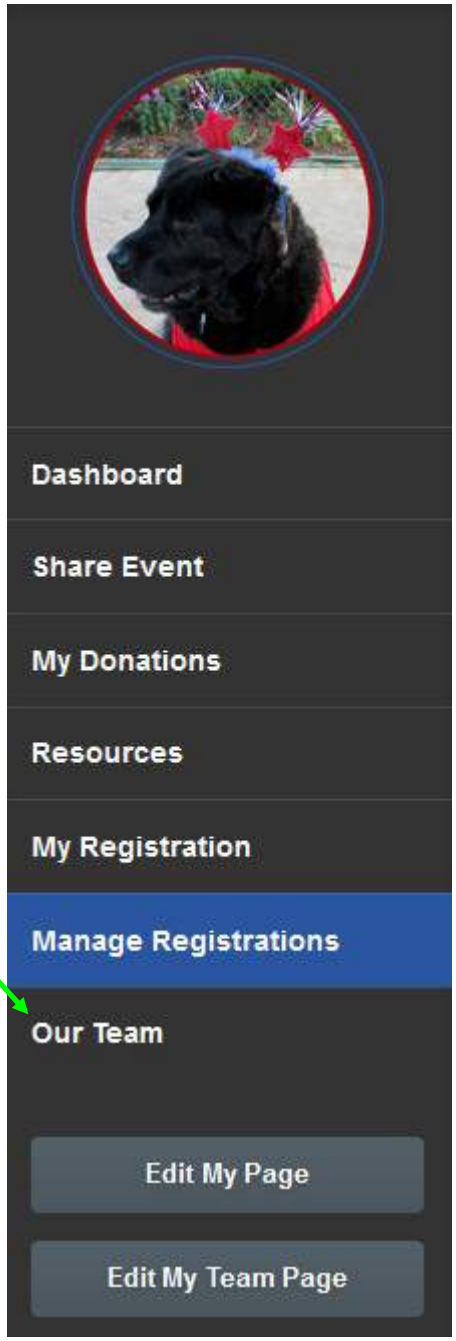
Manage Registrations

This is an area to manage registration information for any **additional registrants** you may have, or to add additional registrants.

If you have any additional registrants, they'll be listed in table at the top of the My Account page. You are able to edit these registrations if necessary or **add new ones** right from your dashboard.

To add additional participants, you'd click the +**Add Additional Registrant** button. This will take you through a registration process much like the one you went through to registration.

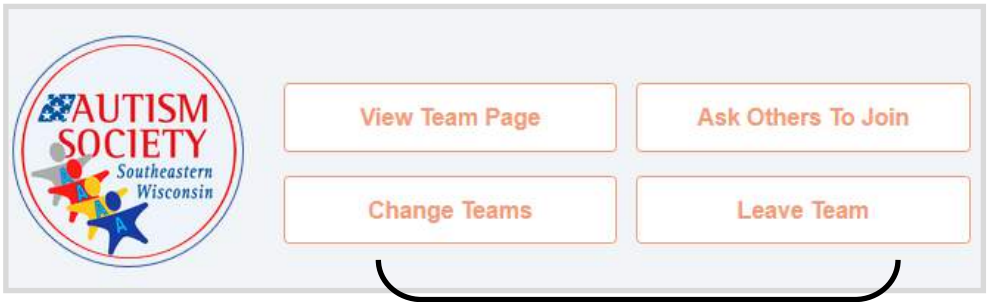




Our Team/Join a Team

If you're on a team, you can manage your team by clicking on the **Our Team** navigation item in your fundraising dashboard. If you're not part of a team and would like to join or create one, click the Join a Team button.

This button will take you to your team fundraising dashboard, where you'll see totals for your entire team's efforts, versus your personal dashboard where you see just what you've individually raised. If you're a captain, you'd also be able to update the goal located under the thermometer in the same way it's done in the personal fundraising dashboard area. You 'll see the following additional options as a member of a team.



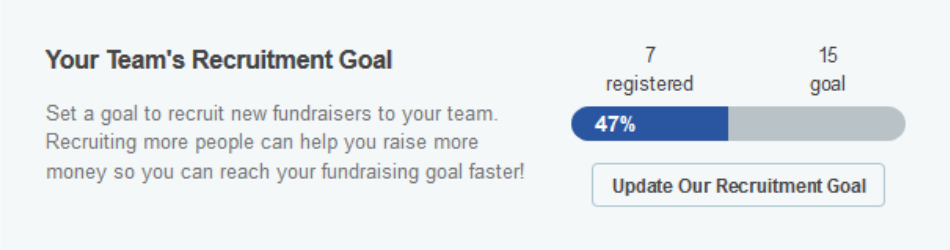
View Team Page - This will display the Team Fundraising Page

Ask Others To Join - This will take you to the **Share Your Event** tab to create an email inviting others to join your team.

Change Teams - This will take you to an interface that allows you to search and join another team, leave your current team, and/or create a new team.

Leave Team - This will allow you to leave the team you are currently on. Once you choose this option, you'll see a pop-up asking you to confirm you'd like to leave the team. Click the Yes, Leave button to proceed. If you choose this option, you'll always have the ability to join or create a team in the future. Below that set of buttons, you have access to your Team Donations and Team Members.

You'll also see a recruitment goal tool where you can enter the number of team members you're aiming for. A goal must be set before this will appear on your public-facing team fundraising page.



Adding Team Donations

As a captain, you're able to add offline team donations. If you have a cash or check donation to add, click the + **Add Cash or Check** button (pictured below) and enter the information for your donor. It is the same procedure as listed previously for personal fundraising page.

Sometimes a registrant accidently misses joining the team they wished to register for. You are able to do that through this software now, but if you have any difficulties with this then just send Sue an email and she'll get it fixed for you.

There are many more features that you might find fun and helpful so just noodle around and check them out! If you have any questions or need help with something, please email sue@assew.org

When you're finished setting up your fundraising page, you may log out by hovering over your name in the upper right -hand corner of the screen and choosing the Logout option from the drop-down menu. You can log in and make changes at any time.

Thank you for joining with us in our mission to improve the lives of all that are affected by autism.

AUTISM SOCIETY
Improving the Lives of All Affected by Autism
Southeastern Wisconsin