



Social Fundraising for Fundraisers

A fundraiser's reference for using Social Fundraising in NeonCRM to support CAPTAIN CHS.

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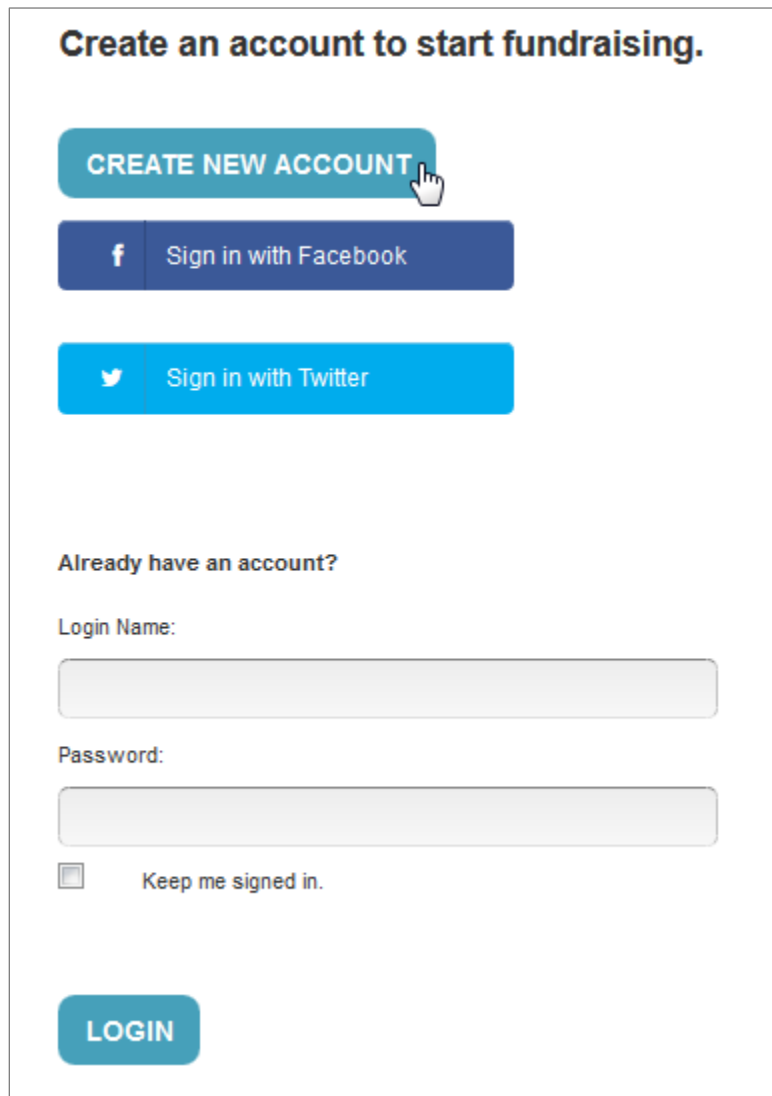
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Creating an Account

In order to create a fundraising page, you need to create an account. You can either create a login name and password unique to your account with CAPTAIN CHS, or you can use an existing Facebook or Twitter account to log in instead.

Creating a NeonCRM Account

Begin by clicking **Create New Account**.



The screenshot shows a web form for creating a new account. At the top, it says "Create an account to start fundraising." Below this are three buttons: a teal "CREATE NEW ACCOUNT" button with a hand cursor icon, a dark blue "Sign in with Facebook" button with a Facebook 'f' icon, and a light blue "Sign in with Twitter" button with a Twitter bird icon. Below these buttons is the text "Already have an account?". Underneath are two input fields: "Login Name:" and "Password:". Below the password field is a checkbox labeled "Keep me signed in." At the bottom left is a teal "LOGIN" button.

Enter your **First Name**, **Last Name**, and **Email**.

Create a new **Login Name** and **Password**.

Enter the numbers shown in the image.

Click **Submit** when finished.

Create Fundraiser Account

| | |
|-------------------|--------------------|
| *First Name: | Jennifer |
| *Last Name: | Test |
| *Email: | jennytest@test.net |
| *Login Name: | jennytest |
| *Login Password: | ●●●●●●●● |
| *Retype Password: | ●●●●●●●● |



54986325



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[Privacy & Terms](#)

SUBMIT



Now that you have created an account, **click the Login Link** to log in using the login name and password you just entered.

Thank you for submitting your information!

An acknowledgement email will be sent to you shortly.

We have created an account for you. You can log into our system using the following information:

Login Link: <https://uat.z2systems.com/np/clients/test/login.jsp>

Login: jennytest

Password: jen*****

(Note the length of this encrypted password may not be accurate.)

Enter your new login name and password and click **Log In**.

It's a good idea to bookmark this page so you can easily find your fundraising page later.

Account Login

Login Name:

Password:

☐ Keep me signed in

for 2 weeks unless I sign out.

[Uncheck if on a shared computer.]

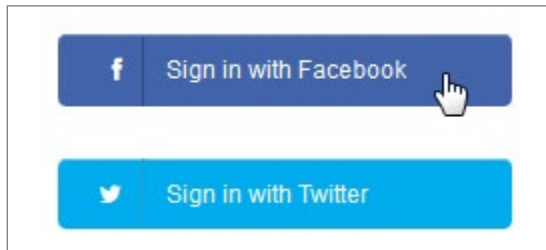
LOG IN

Once you have logged in, you will be taken to the Social Fundraising Overview page.

Creating an account using Facebook

Instead of creating a new login name and password, you can use your existing Facebook account to sign in.

Click the **Sign in with Facebook** button.

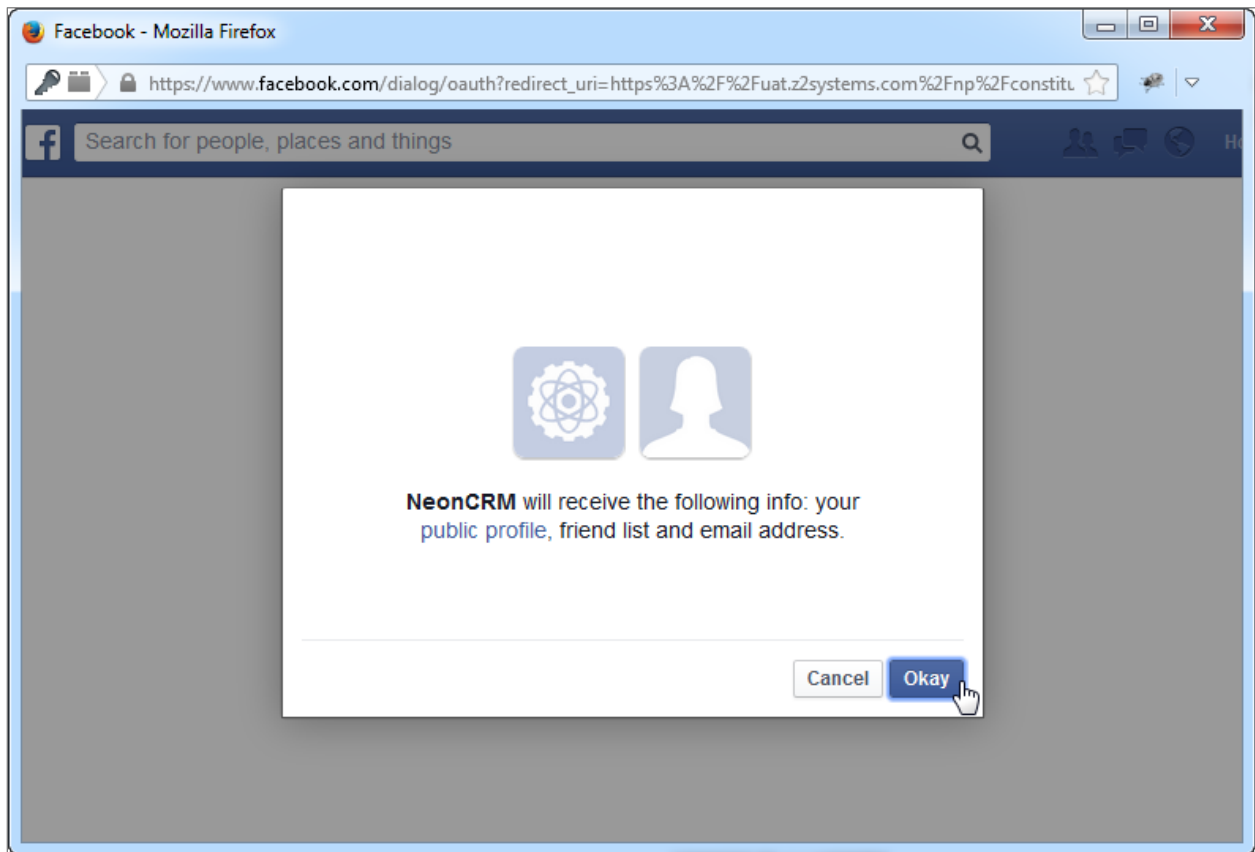


A pop-up window will appear. Ensure that your web browser is not blocking pop-ups on this page.

Enter your Facebook user name and password. Click **Log In**.



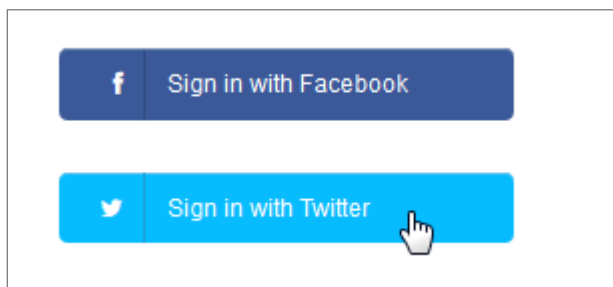
Click **Okay** on the next page.



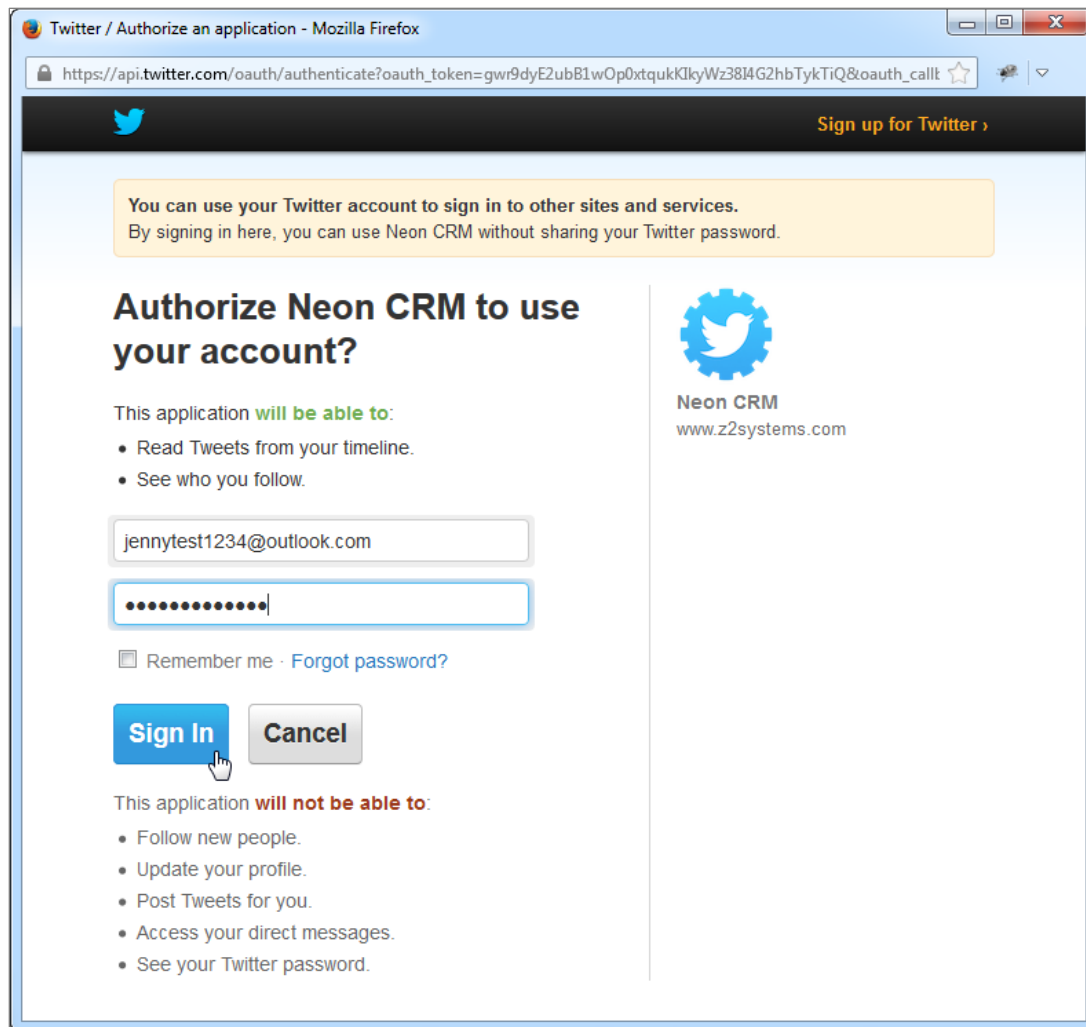
Once you have logged in, you will be taken to the Social Fundraising Overview page.

Creating an account with Twitter

Click the **Sign in with Twitter** button.



Enter your Twitter user name and password and click **Sign In**.




Once you have logged in, you will be taken to the Social Fundraising Overview page.

Creating a Fundraising Page

Once you have logged in, you will be taken to the Social Fundraising Overview page. Ensure the correct campaign is selected, then click **Create Page**.

Welcome Jennifer Test (Account# 66199)


What would you like to do? 


GO

Social Fundraising Overview

You do not have any fundraising pages.

Add a fundraising page for a campaign:

An Example Campaign

CREATE PAGE

This creates a new fundraising page and brings you to your management page.

What would you like to do? [Go](#)

Your Fundraising Page For:
An Example Campaign

[View My Fundraising Page](#)

YOUR PAGE

\$231
RAISED

GOAL \$1,000

CAMPAIGN CONTRIBUTIONS

\$4,853
RAISED

GOAL \$1,000,000

TOP FUNDRAISERS

1. Guy Neal

\$788

2. Mister X Donut

\$20

3. Adgb Aefb

\$0

Page Content

Share My Page

Donations

Event Registrations

Comments

Team

Page Content

Manage your personal fundraising page.

Fundraising Page Title:

☒ Guy Neal's Fundraising Page

☐

Fundraising Page Url:

☒ https://test.z2systems.com/campaign.jsp?campaign=71&fundraiser=124718&

☐ https://test.z2systems.com/

Your Fundraising Goal *:

\$0.00

Current Photo:

Upload a personal photo to your fundraising page.

(No Photo)

Select File No file chosen

Upload

My Page Content:

Source

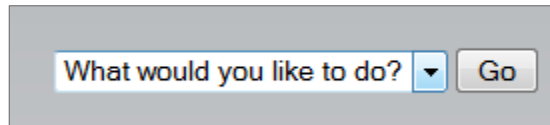
I love tennis and this team is the best. Ever since I joined high school, I wanted to be a part of this team, and now I am! We're trying to raise money so that we can afford to go to our tournaments. Help a girl out by donating or [come with us to the event](#).

body p

Save

Managing Your Fundraising Page

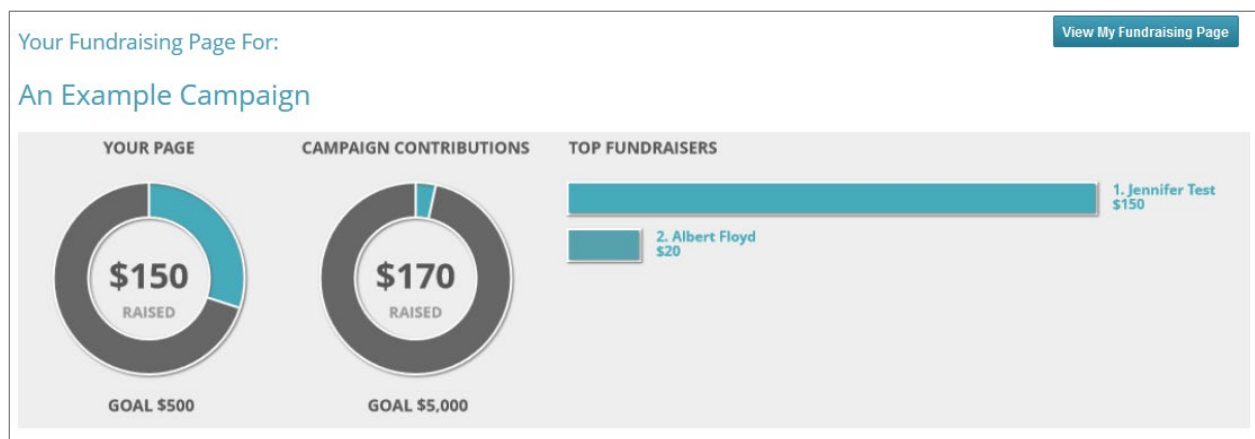
The drop-down menu in the upper-right corner of the screen allows you to navigate to other pages provided by the organization. You may be able to access information about your own donations, update your personal contact information, and more.



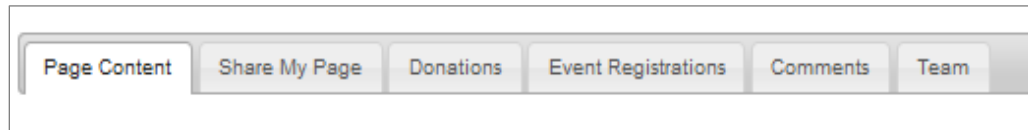
The **View My Fundraising Page** button in the upper-left corner of the screen opens your live fundraising page in a new browser tab. You can click this any time to see what your fundraising page looks like.



The charts on this page show your fundraising page's progress toward your fundraising goal, as well as the overall progress towards the campaign's goal. It also shows you a list of top fundraising pages for this campaign.

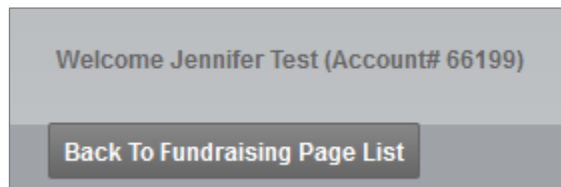


You can use the navigation bar below the charts to navigate through the features provided to help your fundraising efforts.



- **Page Content** – Edit the text and images that appear on your fundraising page.
- **Share My Page** – This helps you get the word out to your friends about your fundraising page through social media.
- **Donations** – This is a list of all of the donations that you have received.
- **Event Registrations** – This is a list of all the people who have signed up for a related event and credited you for their sign-up. You'll only use this if your campaign has an event associated with it.
- **Comments** – When your donors make a donation, they can leave a comment. Use this page to hide any comments that you don't want displayed on your page.
- **Team** – If teams are enabled for this campaign, you can choose to join a team or create your own in this tab.

The **Back to Fundraising Page List** button immediately above the charts will take you back to the Social Fundraising Overview.



If you have more than one fundraising page, they will be listed here. Clicking the **Manage Page** link takes you back to your fundraising management page. If you click **Deactivate**, your fundraising page will no longer be visible to the public. Nobody will be able to access your page or make donations. Your data will not be deleted, and you can easily re-activate the page from this screen.

Welcome Jennifer Test (Account# 66199)

What would you like to do?

GO

Social Fundraising Overview

Total: 1 fundraising pages.

Add a fundraising page for a campaign:

CREATE PAGE

Social fundraising pages:

| Campaign Name | Contribution Total | Goal | Actions |
|---------------------|--------------------|----------|--|
| An Example Campaign | \$50.00 | \$500.00 | Manage Page Deactivate |

Page Content Tab

It's a good idea to specify a fundraising goal. This goal will show up on your fundraising page. You'll see a progress bar that shows you your progress.

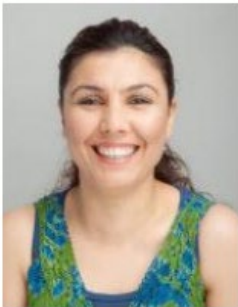
You should also upload a personal photo. This will appear on both your fundraising page and the fundraiser listing page (All Fundraisers).

Page Content

Manage your personal fundraising page.

Your Fundraising Goal *:

Current Photo:



Upload a personal photo to your fundraising page.

No file choosen

[Delete](#)

Adding personal content is a great way to tell your supporters about your fundraising efforts. Use this content editor, which works similarly to Microsoft Word, to add text and images to your fundraising page. Be sure to click **Save** to save your changes.

My Page Content

Source

Thanks for supporting my fundraising campaign!

body p

Share My Page Tab

The **Share My Page** tab gives you tools for sharing your fundraising page with your personal networks. You can copy and paste the direct link for use on web pages and sharing through emails.

Use the **Social Media** links to use your existing social media accounts to share your fundraising page with your personal networks.

My Fundraising Page

Share your fundraising page by copying this direct link.

Donation Link: <https://uat.z2systems.com/np/clients/test/campaign.jsp?campaign=60&fundraiser=71200&team=240&>

Social Media

Use these links to share your page with your personal network.



Donations Tab

The **Donations** tab displays a list of all donations that have been credited to you. This includes the name of the donor, the donation amount, the date they donated, and any comments they left. These donations may have either come through your donation page or have been added manually by a staff member of the organization for which you are fundraising.

Click the **Export to CSV** button to export this list to a .CSV file. You can open this file in a spreadsheet program such as Microsoft Excel.

Manage Donations

View donations, export them to CSV, or hide them from displaying on your fundraising page.

Export to CSV

| Donor | Amount | Date | Comments |
|---------------|----------|------------|------------|
| Jennifer Test | \$100.00 | 11/04/2013 | |
| Jim Bob | \$50.00 | 11/04/2013 | Way to go! |

View 1 - 2 of 2

Event Registrations Tab

The **Event Registrations** tab displays a list of all event registrations that have been credited to you. You will only see data on this page if CAPTAIN CHS has created a corresponding event for your campaign. It is entirely possible that you will see nothing here. *(Note: If you'd like to hold an event as part of you fundraiser, simply contact CAPTAIN CHS – contact details on the last page – to help get that setup for you.)*

Comments Tab

The **Comments Tab** allows you to manage the comments on your fundraising page. You can turn comments completely off by clicking the large **On/Off** button. This does not delete any existing comments, nor does it prevent people from adding new comments when they donate. It merely prevents them from displaying on your page. You will still be able to see all comments on this page.

You can also hide individual comments by clicking the **Hide** button next to the specific comment.

Comments

Turn the comments section of your fundraising page on or off. If you turn comments off, they will be saved but not visible to the public.

ON

Manage Comments

| Donation Comment List | | | | |
|--------------------------|---------|------------|------------|-------------|
| <input type="checkbox"/> | Donor | Comment | Date | Action |
| <input type="checkbox"/> | Jim Bob | Way to go! | 11/04/2013 | Hide |

View 1 - 1 of 1

Bulk actions

Team Tab

If you would like to fundraise as part of a group, you can join a team in this tab. Your options are:

- **No thanks, I'm fundraising on my own** – This will keep you unaffiliated from any team.
- **Yes, and I'm team captain** – This will prompt you to create a team page with its own title and content separate from your individual page.
- **I'd like to join a team.** – This will list all other teams currently available for you to join.

If you are team captain, you are in charge of adding content to your team page. Be sure to add a compelling story that inspires others to give to your campaign. Team pages themselves do not accept donations. Instead, visitors will be encouraged to donate to you and your teammates' individual pages.

Manage your team's fundraising page.

☐ No thanks, I'm fundraising on my own.

☒ Yes, and I'm team captain.

☐ I'd like to join a team.

☒ Guy Neal's Fundraising Team

☒ <https://test.z2systems.com/campaignTeam.jsp?campaignId=71&teamId=10&>

\$0.00

Upload a personal photo to your Team page.

Select File No file chosen

Upload

A screenshot of the Google Docs toolbar. The toolbar is divided into several sections. The first section contains the 'Source' button and icons for undo, redo, and search. The second section contains icons for bold, italic, underline, and strikethrough. The third section contains icons for text color, background color, and a link icon. The fourth section contains icons for bulleted list, numbered list, decrease indent, and increase indent. The fifth section contains icons for link, unlink, and a help icon. The sixth section contains icons for insert image, insert table, and a format dropdown menu. The seventh section contains icons for font color, font size, and a text color dropdown menu. The eighth section contains icons for text background color, text color, and a text color dropdown menu. The ninth section contains icons for text color, text background color, and a text color dropdown menu. The tenth section contains icons for text color, text background color, and a text color dropdown menu. The toolbar is located at the top of the document and is used to perform various editing and formatting tasks.

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Contact and Support

When you're running a fundraiser to make a difference for youth, families, and seniors in our community, CAPTAIN CHS is with you all the way. We're happy to do all that we can to help you succeed, including the development of flyers, event registration, logos, and more. Simply contact us for details:

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Grace Janikas, Development Associate

gjanikas@captaincares.org