Fundraising How To Guide

- **How to Create Your Own Fundraiser**
  - From the home page of the Autism Edmonton Website, click 'Fundraising' in the navbar.
  - **NOTE:** All links on the website that redirect you to the Membership Portal will first open a popup, asking you if you know your Membership Portal login credentials.
    - Click 'Yes' if you know your login credentials, and you will be redirected to the Membership Portal.
    - Click 'No' if you do not know/have your login credentials, and you will be redirected to the Member Registration page, where you can register to become a member.
      - **Once you have registered as an Autism Edmonton Member, return to the Fundraiser tab and follow the steps above.**
  - You create a fundraiser from the website a couple different ways:
    - **Clicking the 'Start Your Campaign'**.
    - **Clicking any of the 'Get Started' buttons.**
      - This will allow you to create a fundraiser in the same category as the fundraiser that you selected
    - **Clicking the 'Create a Donation Page'**
  - After doing one of the actions above, you will be redirected to the Membership Portal Fundraiser Subtab.
  - **Go to the 'Creating or Joining a Fundraiser in the Membership Portal' section at the bottom of this How-to Guide.**

- **How to Join a Fundraiser**
  - From the home page of the Autism Edmonton Website, click 'Fundraising' in the navbar.
  - **NOTE:** All links on the website that redirect you to the Membership Portal will first open a popup, asking you if you know your Membership Portal login credentials.
    - Click 'Yes' if you know your login credentials, and you will be redirected to the Membership Portal.
    - Click 'No' if you do not know/have your login credentials, and you will be redirected to the Member Registration page, where you can register to become a member.

- **Once you have registered as an Autism Edmonton Member, return to the Fundraiser tab and follow the steps above.**
  - User can join an existing fundraiser a couple of different ways:
    - **Clicking the 'Join this Fundraiser' button.**
      - This create a fundraiser that is directly connected to the Autism Edmonton Cycle.
    - **Clicking any of the 'Join This Fundraiser' buttons.**
      - This will create a fundraiser that is directly connected to the fundraiser that you selected
  - After doing one of the actions above, you will be redirected to the Membership Portal Fundraiser Subtab.
  - **Go to the 'Creating or Joining a Fundraiser in the Membership Portal' section at the bottom of this How-to Guide.**

- **<u>Creating your Fundraiser in the Membership Portal</u>**
  - **Details Page**
    - **If you are creating a fundraiser:**
      - <u>Fundraising Category:</u> Select a Category.
        - This field may already be filled if you used a 'Get Started' .button on the website to create your fundraiser.
      - <u>Fundraiser Page Title:</u> Give your fundraiser a name.
      - <u>Duration:</u> Set a start and end date for your fundraiser.
        - If you are creating a fundraiser that is connected to the Autism Edmonton Cycle, the end date field will be filled with the end date of the Autism Edmonton Cycle. This cannot be changed.
      - <u>Fundraising Goal in $:</u> Give your fundraiser a goal.
      - <u>Description:</u> Give your fundraiser a description.
        - This will not be displayed on your webpage. You will create your fundraisers webpage on the next page.
    - **If you are joining a fundraiser:**
      - <u>I am joining as:</u> Select how you would like to join the selected fundraiser.
        - You can Join as an Individual, Organization, or Team
      - <u>Fundraiser Page Title:</u> Give your fundraiser a name.
      - <u>Fundraising Goal in $:</u> Give your fundraiser a goal.
    - After filling all the fields on the Details page, click the blue arrow in the bottom-right corner of the page to go to the Web Design Page.
  - **Web Design Page**
    - **Here is where you will create your webpage.**
    - In the Fundraiser Page Title field, give your webpage a name

- In the left-hand menu, there are 4 fundraising templates.
    - You can drag and drop one of these templates into the box labeled 'Form Fields'.
    - You can view the template by clicking the eyeball icon next to the template's name.
- Once you have chosen a template, drag and drop it into the 'Form Fields' section.
    - This will make the template appear on the screen.
- **Once the template is visible on the screen, you can edit the template sections by clicking on different sections of the form.**
    - **Click the placeholder profile picture. A slider will open.**
        - Under the 'Documents' label, you will notice text that reads 'placeholderperson.png'.
        - To replace this image, click the red 'X' next to the text, and click the Choose file button below. This will allow you to upload a file saved on your device.
        - Once you have chosen a new image, scroll to the bottom of the page and click 'Finish'.
    - **Click the Social Media Icons section. A slider will open.**
        - Add your social media handles to any of the social media fields here.
        - Scroll to the bottom of the page and click 'Finish'.
    - **Click the 'My Team Members' section. A slider will open.**
        - In the field labelled 'Content', you can add/remove team members.
        - Scroll to the bottom and click 'Finish'.
    - **Click the 'John Doe' section. A slider will open.**
        - In the 'Field Label' field, you can edit this heading.
        - Scroll to the bottom and click 'Finish'.
    - **Click the Lorem Ipsum content. A slider will open.**
        - In the field labelled 'Content', you can remove and edit this text.
        - Scroll down to the bottom and click 'Finish'.
- When you are happy with how your webpage looks, click the 'Submit' button at the bottom of the page.
- **This will redirect you to the Status Page**
- **Status Page**
    - This page will confirm your fundraiser submission
    - This page will notify you that your fundraiser has been successfully created and is awaiting approval by Autism Edmonton
    - **Once your fundraiser has been approved, you will be granted access to the Mailouts Page**
- **Mailouts Page**

- **In the Mailouts tab, you can create/add email groups.**
  - These are lists of individuals that you can email in bulk, notifying them of your fundraiser.
- Click the 'Import new Group' button in the header.
- Give the email group a name in the 'Email Group Label' field.
- To import an email group, you must create a **CSV** of the individuals that you would like to email.
  - **THE CSV MUST CONTAIN ONLY THREE COLUMNS**
  - **THE FIRST ROW OF THESE THREE COLUMNS SHOULD BE LABELLED AS FOLLOWS:**
    - **First Name**
    - **Last Name**
    - **Email Address**
  - **NO FIELDS CAN BE EMPTY IN THIS CSV.**
- Click the Choose File button and import your created CSV.
- Click the 'Submit' button.
- You can Email individual groups by clicking the 'Email' icon in the 'Function' column of a specific email group.
- You can view the individuals within an email group by clicking the Eyeball icon in the 'Function' column of a specific email group.
- You can Delete an email group by clicking the Trashcan icon in the 'function' column of a specific email group.
- You can send an email to all email groups by clicking the 'Send to All Groups' button.

- **How to Donate to a Fundraiser**
  - From the home page of the [Autism Edmonton Website](#), click 'Fundraising' in the navbar.
  - In the 'Ways to Fundraise' section, click 'Find a Fundraiser' under any of the categories.
    - This will redirect you to a page that displays all active fundraisers within the selected category.
  - On one of the Fundraisers on this page, click 'View This Fundraiser'
    - This will redirect you to the selected fundraisers main page.
  - Click the 'Donate' button on the page.
    - This will redirect you to the Donation page.
  - Input your First Name, Last Name, Email, and donation amount into the required fields.
  - If you would like to receive a Tax Receipt, select 'Yes' in the 'Tax Receipt' field.
    - **If you would like a Tax Receipt, you are required to donate a minimum of $20.00, as well as include your address information**

- If you would like to have your donation displayed on the fundraiser's webpage, select 'Yes' in the 'Would you like to make your donation public' field
  - **Selecting Yes in this field will display your first name, as well as how much you donated on the fundraisers main page.**
- After these fields have been populated, click 'Next'.
  - This will redirect you to a page where you can confirm your information is correct.
- If your information looks correct on this page, click the 'Donate' button at the bottom.
  - This will prompt you to add your PayPal credentials and make the transaction.
- Once your transaction has been approved, click the 'Return to Merchant' button.
  - This will redirect you to a Thank You page.
- A "Thank You' email will be sent immediately to the inputted email along with a PDF of your individual details, and payment details.
  - Once the transaction has been approved and confirmed, another email will be sent to the inputted email.
    - **Tax Receipt will be attached to this email if you choose to receive one.**