



Engage and Fundraise

Your Participant Centre Resource
Guide

Welcome to your Participant Centre!

Your Participant Centre is your fundraising headquarters and houses tools and resources that will help you achieve your fundraising goal!

Through your participant centre, you can:

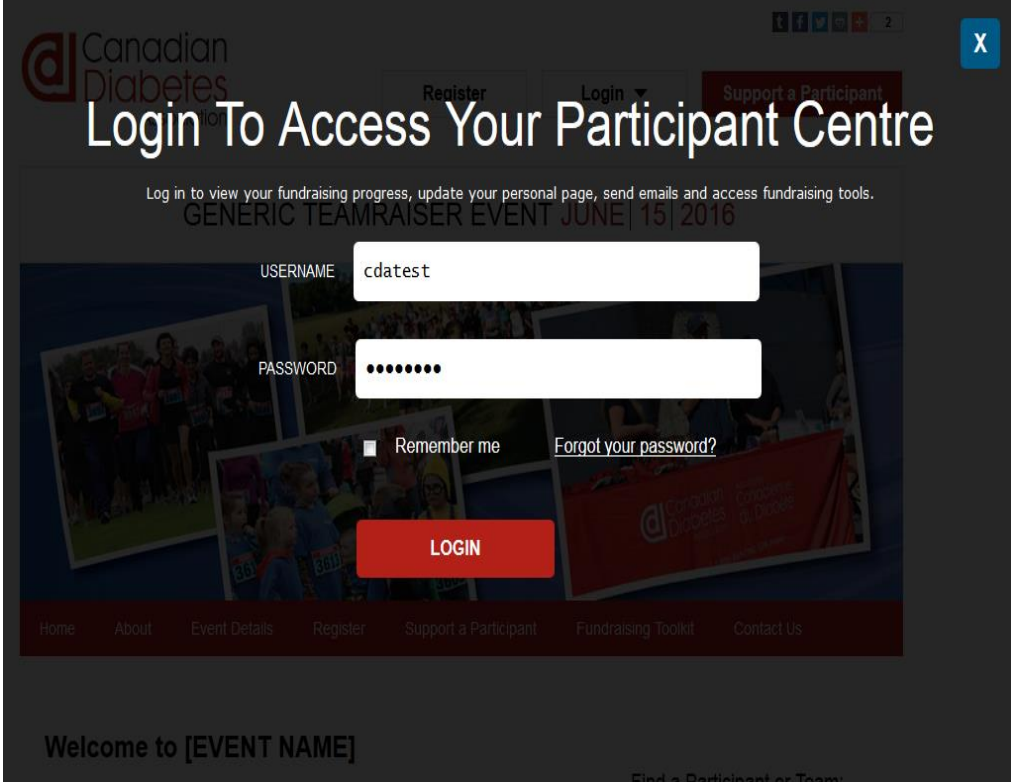
- Personalize your online fundraising page with your message, photos and videos.
- Send out e-mails to solicit and thank donors
- Download offline donation forms and other great resources
- Track your progress

If you are a Team Captain, you have even more functionality with the ability to post message to your team, update the Team Page and track group donations!

Logging In

You will see a login button at the top of your event page. When you click on it you will be prompted to sign in using your login credentials.

If you forgot your password please click on the link below and we will send you a reset link.

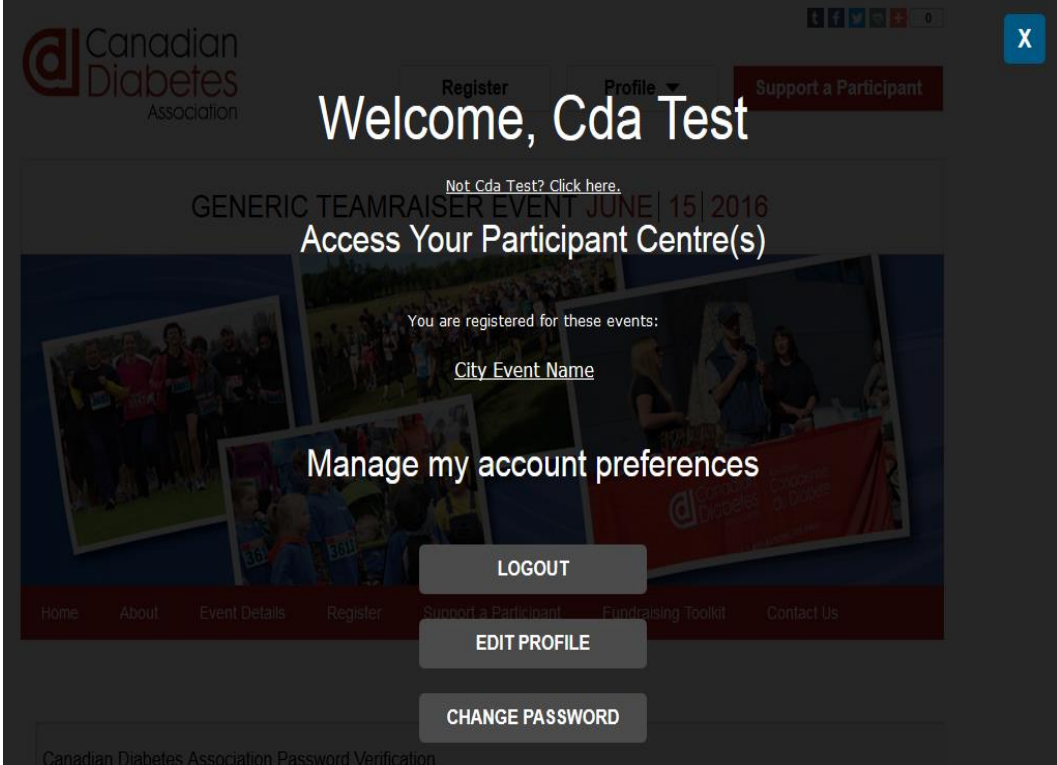


The screenshot shows a login interface for the Canadian Diabetes website. At the top, there are navigation links for 'Register', 'Login', and 'Support a Participant'. The main heading is 'Login To Access Your Participant Centre'. Below this, a sub-heading reads 'Log in to view your fundraising progress, update your personal page, send emails and access fundraising tools.' The event name 'GENERIC TEAMRAISER EVENT JUNE 15 | 2016' is displayed. The login form includes a 'USERNAME' field with the text 'cdatest', a 'PASSWORD' field with masked characters, a 'Remember me' checkbox, and a 'Forgot your password?' link. A red 'LOGIN' button is positioned below the form. The background features a collage of photos of participants. At the bottom, a navigation menu includes 'Home', 'About', 'Event Details', 'Register', 'Support a Participant', 'Fundraising Toolkit', and 'Contact Us'. A footer message says 'Welcome to [EVENT NAME]' and a search bar is partially visible at the bottom right.

Logging In

Once you have logged in successfully you will have the following options:

- Go to your participant centre for any current events you are registered for
- Edit your profile
- Change your password
- Logout



The screenshot shows the Canadian Diabetes Association website interface. At the top left is the logo for the Canadian Diabetes Association. To the right of the logo are social media icons and a user profile icon with an 'X' inside a blue square. Below the logo, there are links for 'Register', 'Profile', and 'Support a Participant'. The main heading reads 'Welcome, Cda Test'. Below this, there is a link 'Not Cda Test? Click here.' and the text 'GENERIC TEAMRAISER EVENT JUNE | 15 | 2016'. The primary action is 'Access Your Participant Centre(s)'. Below this, it says 'You are registered for these events:' followed by a table with one row containing 'City Event Name'. A prominent button 'Manage my account preferences' is centered. Below this are three buttons: 'LOGOUT', 'EDIT PROFILE', and 'CHANGE PASSWORD'. At the bottom, there is a navigation menu with links: 'Home', 'About', 'Event Details', 'Register', 'Support a Participant', 'Fundraising Toolkit', and 'Contact Us'. The footer contains the text 'Canadian Diabetes Association Password Verification'.

Your Participant Centre

Navigation Bar

The screenshot shows a user interface for a participant centre. At the top, it says "Welcome, Cda Test" and has links for "Profile", "Help", and "Log Out". Below this is a navigation bar with buttons for "Home", "Email", "Progress", and "Personal Page". The main content area is titled "Overview" and "Your Fundraising Progress". It features a progress bar and four data points: "I Have Raised" (\$0.00), "My Goal (change)" (\$125.00), "Percent" (0%), and "Days Left" (0). Below this is a "Welcome to your Participant Centre Cda" message and a "Fundraising Toolkit" section with icons for a birthday cake, a clipboard, and a person. On the right side, there is a sidebar with buttons for "Send email", "Enter new gift", and a list of shortcuts: "Add Contacts", "View Your Progress", "Edit Personal Page", "Check In Online", and "Change Team Membership". At the bottom of the sidebar are social media icons for Facebook, Twitter, and LinkedIn.

Fundraising Status

Shows what you have raised, your current goal, a link to update your goal and a countdown to your event date.

Shortcuts

Fundraising Toolkit

Here you can find a variety of tools to help you reach your goals.

Your Personal Page

Your Personal Page is the page your donors will see before they donate to you. You should personalize this space to reflect your event and why you have chosen to support the CDA.

Welcome, Cda Test | Profile | Help | Log Out

Home | Email | Progress | **Personal Page**

Edit Your Personal Fundraising Page (View Personal Page)

Personal Page URL: ()
http://crm2.diabetes.ca/goto/ [input field]

This page is
 Public (Everyone can find and view and your Personal Page.)
 Private (Only people who know the exact URL can find and view your Personal Page.)

Cancel Save

Title
Welcome to My Personal Page

Body

ABC Font family Font size [icons]

B *I* U ABC [icons]

I'm raising money in support of [Organization] by participating in [client to insert Event Name].

By making a donation to me, you are helping to [provide details about the event and how the funds raised will help support the mission or cause].

Please make a donation today and help me to reach my fundraising goal!

Content
Photos/Video [dropdown arrow]

0 [f] [t] [in]

Customize your URL

Upload a photo or video.

Include a title for your page.

Personal Message

Email Tools

You can import all of your contacts from outlook, gmail, hotmail and other email sources. You can use one of the pre-written templates to solicit donors and thank those who have donated to your campaign. You can edit these template or create your own.

Welcome, Cda Test | Profile | Help | Log Out

Home **Email** Progress Personal Page

Compose Message

1 Configure 2 Compose 3 Set Recipients 4 Preview & Send

Select Email Template

Solicitation (1)

- Please Help Me Reach My Goal (Preview)

Other (1)

Save as draft Save as template Preview Next

Compose

Drafts

Sent

Contacts

0 f t in

Email Templates

Import or manually add in your contacts

Importing Your Contacts

To import your contacts click on the contacts tab, Gmail & Yahoo users can import directly by following the prompts on the screen. If you use another provider you can import your contacts by exporting a CSV file on your computer and then import that CSV into your PC.

1 Welcome, Cda Test | Profile | Help | Log Out

Home Email Progress Personal Page

Compose Message

1 Configure 2 Compose 3 Set Recipients 4 Preview & Send

Select Email Template

Solicitation (1)

Please Help Me Reach My Goal (Preview)

Other (1)

Save as draft Save as template Preview Next

2 Welcome, Cda Test | Profile | Help | Log Out

Home Email Progress Personal Page

Contacts

Compose Message Add to Group Delete Email All

Search Contacts

Individuals Groups

Name	Groups	Email		Page Visits	Donations Current
		Sent	Opened		
No records found					

(Select all or none) Contacts Page: 25 of 0 of 0

Import contacts Add single contact

f t in

3 Import Contacts

1 Select Source 2 Retrieve Contacts 3 Select Contacts

4 View Results

Select an Import Source (Tell me more)

Importing contacts from other email services into your Participant Centre Address Book makes it easy to solicit donations, monitor who responded, and follow up with personal thank you notes.

Let's begin by identifying where you keep your address book.

You can import contacts directly from an email service below:

- Gmail
- YAHOO!

OR you can upload a .csv file exported from another email client:

File-based import for...

(Hotmail, Apple, Outlook, AOL)

Cancel Next

Follow up!

After you have sent your first round of emails be sure to follow up with your contacts. When you click on the contacts tab you can see who has opened your email, who has clicked through to see your page and who has donated.

Welcome, Cda Test | Profile | Help | Log Out

Home Email **Progress** Personal Page

Contacts

[Compose Message](#) [Add to Group](#) [Delete](#) [Email All](#)

Individuals Groups Search

Name	Groups	Email		Page Visits	Donations
		Sent	Opened		
No records found					

(Select all or none) Contacts/Page: 25 « < 0-0 of 0 > »

0 [f](#) [t](#) [in](#)

Compose
Drafts
Sent
Contacts
Import contacts
Add single contact

Offline Donations

You may receive some cash & cheque donations throughout your campaign. You can enter these in your PC so that they reflect in your total. Once these are entered you can either send/bring them to your local CDA office or submit on event day along with a donation form that can be found in your “Fundraising Toolkit” on the first page.

Welcome, Cda Test [Profile](#) | [Help](#) | [Log Out](#)

Home | **Email** | Progress | Personal Page

Overview

Your Fundraising Progress


\$0.00 I Have Raised	\$125.00 My Goal (change)	0% Percent	0 Days Left
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Welcome to your Participant Centre Cda

From here you will be able customize your personal fundraising page, send emails to your family and friends to ask for their support, send thank you emails and track your progress.

Fundraising Toolkit

Here are some great ideas and fundraising tools to get you started! Feel free to use them to reach your personal goals. Also, we have a few more inside your participant centre once you get registered/logged in!



Welcome, Cda Test

Home | **Email** | Progress | Personal Page

Enter New Gift

Enter the details for a gift that someone gave you or promised to give you:

*First Name

*Last Name

Email

Additional gift entry fields

*Amount

*Payment Type Cash Check

You can find a downloadable donation form in the Fundraising Toolkit

Fundraising Success!

Your Participant Centre is a great tool to utilize during your fundraising efforts.

Here are a few more tips to help you on your way:

- Use Social Media to share your page and your progress. There are built in sharing tools in your PC or you can simply copy & paste your page link into your status.
- Check out our PC Fundraising Toolkit for more downloadable resources to help you spread the word.

Thank you for your hard work and commitment to reaching your fundraising goals. If you have any other questions please reach out to your event coordinator for assistance.