



## *online fundraising guide*

- ▶ *personalized websites*
- ▶ *fundraising management*
- ▶ *email communications*
- ▶ *tips for success*

*fundraising made easy*

## WELCOME TO ACTIVEGIVING

ActiveGiving is designed to make your fundraising effort a total success. The software is efficient and easy to use. You can even customize your fundraising page to best reflect your cause, while infusing your own individual touch and personality.

ActiveGiving's success stems from the simple contribution collection process. You won't have to gather checks and address information, instead you will collect donations online. Your family, friends, and other donors will be able to make pledges online using a credit card and automatically receive immediate email confirmation and a tax receipt email. The online system tallies all the contributions, dynamically tracks all top contributors and fundraisers, and reports all donation data.

The process is extremely simple, so get started right away!

## GETTING STARTED

1. Go to [www.active.com/donations](http://www.active.com/donations).
2. Login with your ActiveGiving username and password.
3. Welcome to ActiveGiving, your Online Fundraising Management tool. To begin personalizing your page, click on **Customize My Webpage**.

The screenshot shows the ActiveGiving user interface. At the top, the navigation bar includes links for 'My ActiveGiving', 'Customize My Webpage', 'Send Emails', 'View Reports', 'Track Offline Donations', and 'Fundraising Tips'. The 'Customize My Webpage' link is highlighted with a yellow circle. Below the navigation bar, the main content area is titled 'Fundraising Campaign' and includes a link to view the website. The page is divided into four numbered sections: 1. GET READY (customize message, upload images, pick template, set color scheme), 2. HAVE A PLAN (set goal, start early, educate donors, ask BIG!), 3. PROMOTE YOUR MESSAGE (use email tools, import contact info), and 4. FOLLOW UP (send reminders, say thank you, let people know). A 'Do a quick calculation!' box provides an example scenario. A 'WIN \$250!' banner is also visible. At the bottom, a bar shows 'Total Amount Raised: \$11.00'.

## 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.
3. **Set a Goal**
  - **Goal Amount:** a dollar amount you would like 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.*

**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

1. **Template:** use the email template provided in the drop down box for prewritten standard communication messages.
2. **Create/Edit Templates:** click the link to write and save new messages to use in the future.
3. **Subject:** topic of email message.
4. **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. **Current Address Book:** all current contacts stored in Address Book.
3. **Edit/Delete Contacts:** click the links to update contact information.

*Note: Click Close Window to save updates.*

### Create/Edit Templates

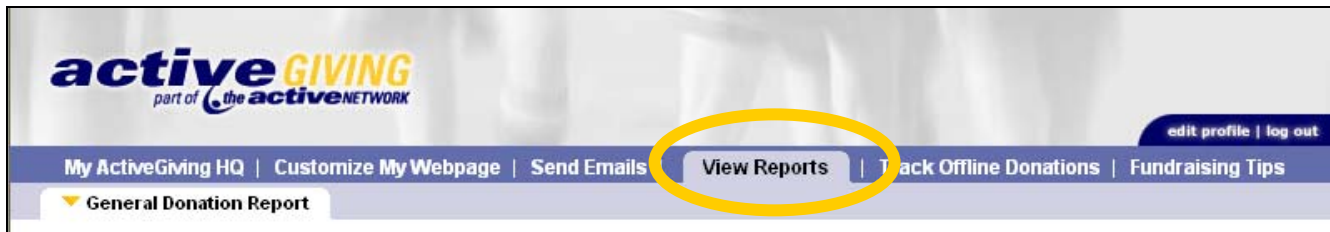
1. **Template Name:** name used to store email template. Be specific so you can easily distinguish the template in the future.
2. **Template Subject:** stored email subject line to be automatically imputed when using template.
3. **Template Message:** enter a customized message about your fundraising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

## VIEW REPORTS



### Donation Report

1. **Donation Summary:** a real time summary of your daily progress.
2. **Filter Report:** control of your donation report details.
  - **Date Filters:** select dates for specific report data or check Use All Dates to see all your data.
  - **Donation Types:** drop-down box to report online only, offline only, or all donation data.
3. **Donation Details:** the results of the Filter Report listed by contributor.

## 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.
3. **Undetailed Donations:** enter the dollar amount given by offline contributors without specifying name, address, etc.

**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 your 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.

## 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