



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 get logged 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 the entity hosting the event.

HINT: Usernames are always email addresses.

Log In or Sign Up ▾

Email Address

Password

Log In [Forgot your password?](#)

or log in using

Sign Up Now

Welcome Quest

If enabled, 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, click on one of the Welcome Quest items and the system will guide you through it from there.

Complete Your Profile

0% Complete

- ✓ Upload Your Avatar
- ✓ Update Your Personal Page
- ✓ Send a Fundraising Email
- ✓ Raise Your First Donation
- ✓ Schedule a Post on Facebook / Twitter

[or view your Fundraising Dashboard](#)

Once you leave the above screen and are logged in to your Fundraising Dashboard, you'll always be able to access your Welcome Quest via the bar spanning the bottom of your screen. It will stay minimized, but you can expand it by clicking on it at any time.

My Fundraising Tools

My Fundraising Tools ▾

- Fundraising Dashboard
- Edit My Page
- Share Event
- Donation Center
- Manage Registrations
- Team Fundraising


Copy My Page URL Copy My Team URL Copy Donation URL

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

Dashboard

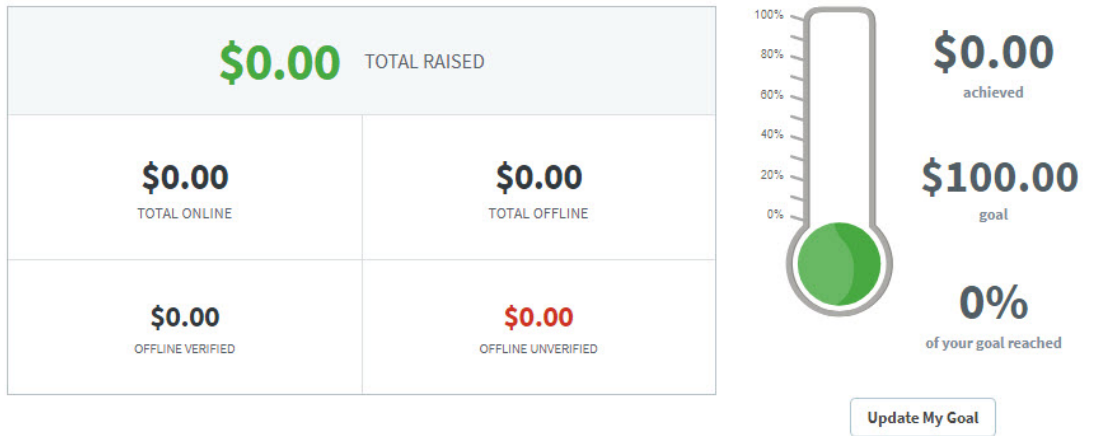
You may also navigate between the different areas of your fundraising center via your **Fundraising Dashboard**. You'll see a menu down the left side that contains the same navigation items as your **My Fundraising Tools** dropdown, along with a few additional options/pieces of information.



- Dashboard
- Share Event
- My Donations
- Resources
- My Registration
- Manage Registrations
- Our Team
- Edit My Page

My Fundraising Dashboard

Customizing your fundraising page will help you raise more money! Creating a unique page for yourself is easy – all the tools are right here.



Get the Word Out

Providing easy access to your fundraising page is a great way to increase donations.

-  Send a Fundraising Email
-  Add a Registrant
-  View My Page 
-  Share on Facebook

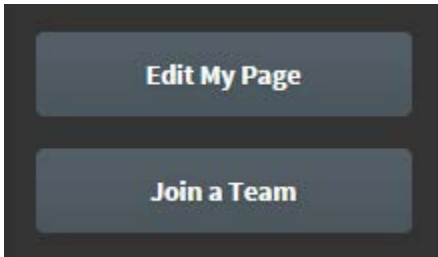
- Links
- Texting

My Page [click to copy](#)

<https://secure.qgiv.com/event/account/33801>

[Edit URL](#)

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.

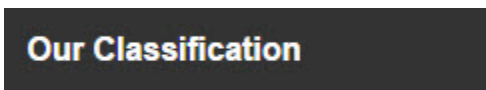


Edit My Page will shortcut you to the content management system, allowing you to customize the look of your fundraising page.

Join a Team will shortcut you to a screen where you can search for teams from a list of existing teams, or you can create your own team.



If you're already on a team, the button will change to a navigation item that says **Our Team**, which will appear below **Manage Registrations**. It will take you to your team's fundraising dashboard and give you a few options for actions to take, which we'll talk about later on.



If you're a classification captain, you'll see the **Our Classification** button that will take you to your classification's fundraising page.

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. 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!



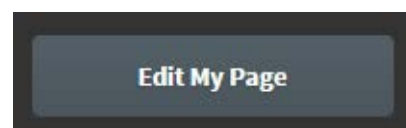
Your **Fundraising Dashboard** includes your thermometer, which displays how much you've raised thus far, your individual goal, and the percentage of your goal you've currently raised.

You're able to update your goal by clicking the **Update My Goal** button below the thermometer.




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

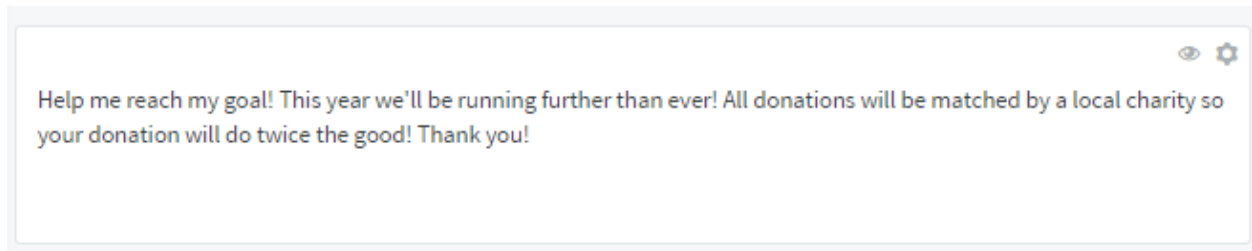


In this area, you can customize your personal fundraising page. Your ability to customize different areas of your page is managed by the nonprofit organizing your event. If you're unable to edit or move certain widgets, it's more than likely because your admin has not enabled this functionality.

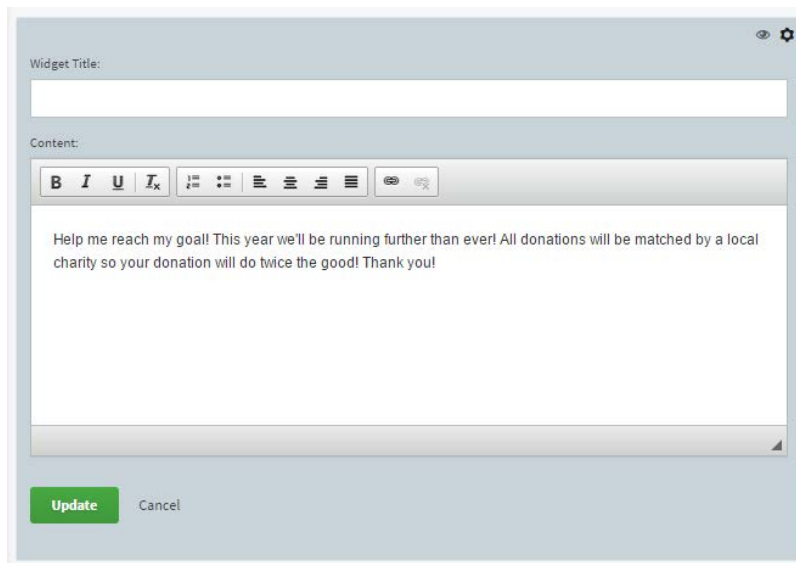
After you click the **Edit My Page** button you'll see a number of boxes that allow you to customize your page. These boxes are called widgets.

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.

To hide a widget on your page, click on the eye-shaped icon  in the top right-hand corner of the widget you wish to hide.



Edit mode:

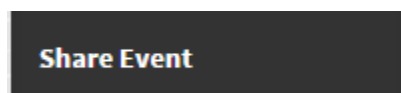


Make sure to click the **Save Page** button when you're finished.



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 the admin.

Share 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 your admin has defined for you. To display the **Emails**, **Drafts**, **Mailing Lists**, and **Templates** tabs, click the **Email Management** button.

Email Management

Share Event

Share your event by email, Facebook, or Twitter. People can't donate to you if they don't know how – start getting the word out!

Share Using Email

Share On Facebook

Share On Twitter



Email Your Donors



Send a Fundraising Email

Emails

Drafts

Mailing Lists

Templates

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**.

+ 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.

Mailing List Name

Mailing List Emails

Separate addresses by comma.

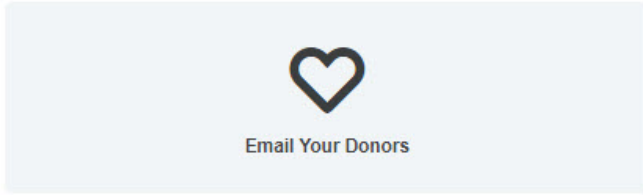
Import Email Addresses

Save List

Cancel

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.

2 Email Information

Email Title required

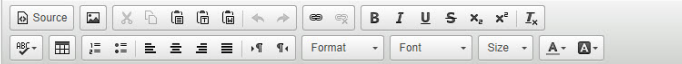
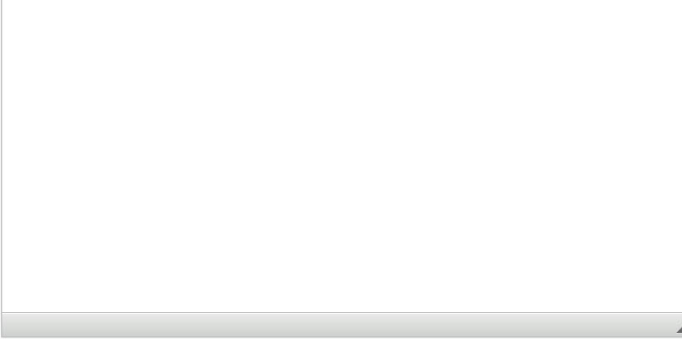
This will help you organize your fundraising emails; recipients will not see this title

Start with an existing template?

Choose Template ▾

Subject required

Your Message required

Tip: Tags (ex. %EventName%) will be populated once the email is sent.

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.

To:

Send to These Addresses Separate addresses by comma

This email will be sent to **0** people.
[Need a custom list? Manage Email Lists](#)

Select Mailing Lists 

Select list(s)...

[Import Additional Addresses](#)

Add my email address as a recipient

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.

When Should We Send This Email?

- Immediately
- Goal Percentage Reached
- Send on specific date
- Periodically

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 a 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 pieces 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.

Scheduled

Donation Email to Family



CREATED
Jan 05, 2015

CAMPAIGN TYPE
Auto - On Specific Date

✓ Sent

I'd appreciate your help!



CAMPAIGN SENT
Jan 05, 2015

MAILING LIST
Custom List - I'd appreciate your help!

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.

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**.

Templates

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.

+ New Template

Once you're happy with what you've entered, click the **Save Template** button at the bottom of the body content box.

Email Template Name

From Address

Subject

Template Body

Rich text editor toolbar with icons for undo, redo, search, bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, and source code.

Buttons: Insert, Format, Size, Font color, Background color, Source

Large text area for the template body content.

Save Template Cancel

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.

Share Event

Share your event using Facebook, Twitter, or e-mail. People can't donate to you if they don't know how – start getting the word out!

Share Using Email	Share On Facebook	Share On Twitter
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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.

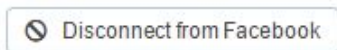
In this tab, you'll see a large blue button inviting you to do so.

Connect Your Facebook Account

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. If this is an option, you'll see a dropdown that says **Create From Template** that allows you to choose a template to use. If there aren't any defined templates, you'd 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 determine when you want this particular post to be shared on Facebook. Your options are as follows:

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

	Post Name	Type	
Post	Help Support! Please help support my fundraising efforts!	Manual	Edit Post Delete

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.

Goal Percentage Reached
Post my update when I've reached _____ % of my goal

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

Send on specific date
Post my update on _____ at 01:00 AM (EST)

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

Periodically
Post my update starting _____

Once you pick when you want to post, you'll create the content of your post. As you begin to create your post, 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 are happy with your post, click the blue **Schedule Facebook Post** button.

Share on Twitter

You can use the **Share on Twitter** tab to connect your personal Twitter account to your fundraising center.

Share Using Email	Share On Facebook	Share On Twitter
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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.

[Connect Your Twitter Account](#)

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:

Authorize Qgiv Online Donations to use your account?

*
 *
 Remember me · [Forgot password?](#)


Qgiv Online Donations
 By Qgiv
www.qgiv.com
Automated Twitter postings through Qgiv and Hobnob Participant Center.

Authorize app
Cancel

This application will be able to:

- Read Tweets from your timeline.
- See who you follow, and follow new people.
- Update your profile.
- Post Tweets for you.

Will not be able to:

- Access your direct messages.
- See your Twitter password.

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 this:



Creating a New Tweet

Your admin may have post templates you can use or modify, rather than having to create brand new posts. If this is an option, you'll see a dropdown that says **Create From Template** that allows you to choose a template to use. If there aren't any defined templates, you'd 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: This 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.

	Tweet Name	Type	
Tweet	Help Support! Please help support my fundraising efforts!	Manual	✎ Edit Tweet ✖ Delete

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.

Goal Percentage Reached
 Post my update when I've reached _____ % of my goal

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.

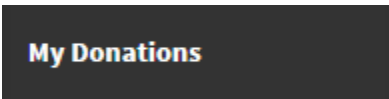
Send on specific date
Post my update on _____ at 01:00 AM (EST)

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.

Periodically
Post my update Monthly starting _____

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.

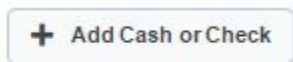
Updating Your Goal

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 enabled for your event)

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 .

Resources

Resources

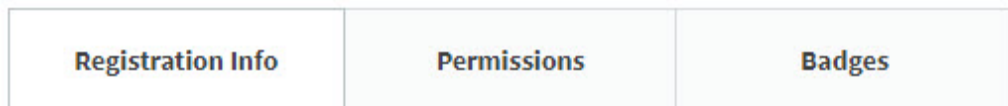
Your admin has the ability to upload resources for your use. Resources often include images, flyers, sample emails, instructions, etc. If your admin has uploaded anything for your use, it will be located in the **Resources** section.

The **Resources** interface will allow you to sort, preview, and download any files uploaded by the admin.

My Registration

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.



Registration Info

In the Registration Info tab, you'll see your **Personal Information**, which may be updated if needed. If you're part of a team or a classification, you'll see the names of those 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

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
- ✓ Appearing in the search feature throughout the event site
- ✓ Appearing in the leaderboards as a top fundraiser if you qualify

Email Notifications

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

- ✓ Someone donating through your page
- ✓ Receiving a badge

Once you make any necessary changes to this area, click the **Save Settings** area to update your **Permissions**.

Badges

If your admin has enabled or created badges for your event you'll see this section. 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

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

My Account

Registrations	Email Address	
John Smith	josmith@mailinator.com	✎ Edit Registration
+ Add Additional Registrant		

Our Team/Join a Team

Our 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.

Join a Team

Our Team

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

Ask Others To Join

Change Teams

Leave Team

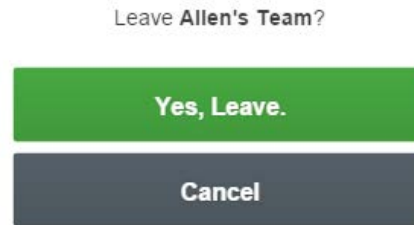
View Team Page: This will display the Team Fundraising Page

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

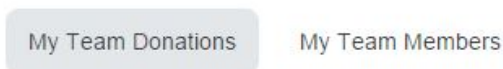
Change Teams: This will take you to an interface that allows you to search and join another team, leave your current team, and/or create a new team.

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.



You can toggle between the two areas to view listings of anyone who has donated to the team and all fellow members of your team.

 Promote  Demote

In the **Team Members** area, you have the ability to promote and demote members of your team if you're a captain. If you promote someone to captain, they'll have the ability to update goals, edit the team page, and add offline team donations if enabled by the admin. Any team members with a yellow star are captains of the team. If needed, you're also able, as a captain, to delete members of the team by using the red X in the **My Team Members** area.

Adding Team Donations

As a captain, you're able to add offline team donations, if enabled by your admin. 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.



You can classify the gift as a check or cash gift. If it's a check, 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.

Join a Team

Clicking this button will take you to a page where you can search for and join existing teams, or create a new team if you're registered as an individual.

Teams

[+ Create a Team](#)

Search Teams



Searching teams is as easy as entering a search item in the **Search Teams** box. Once you locate the team you'd like to join, click the **Join Team** button to become a member of the team.

[Join Team](#)

If you click on the **+ Create a Team** button, you'll see a pop up that will allow you to enter a team name and fundraising goal. Once you enter this information, click **Create** to create the new team. You'll now be the captain of the new team and have access to the team dashboard within your fundraising center.

Create a Team

Team Name required

Fundraising Goal required

Create

Cancel

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.

