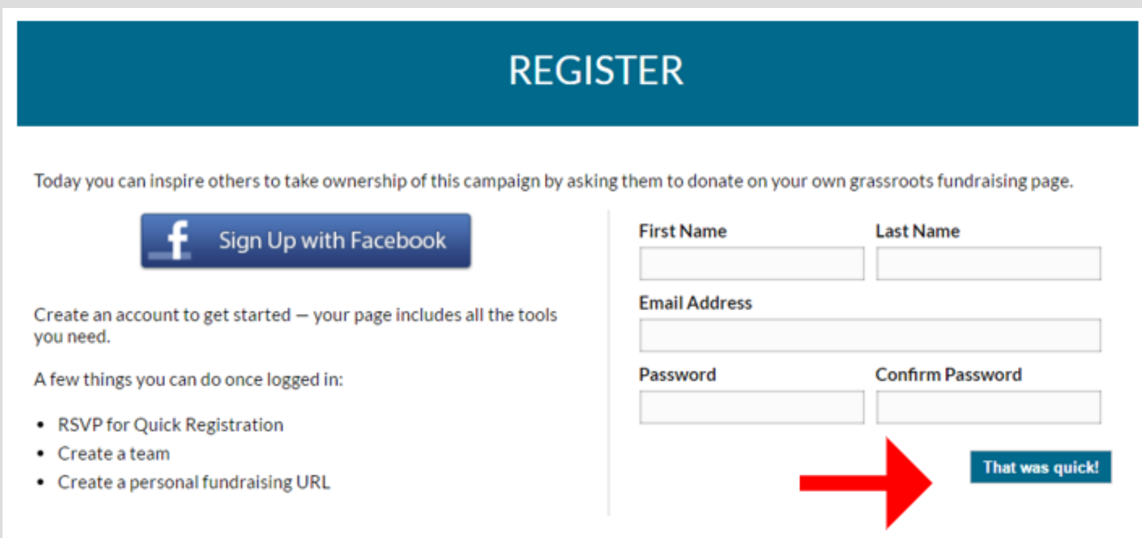
STEP 1: SIGN UP

All that is required to register is your first and last name, email address and password.

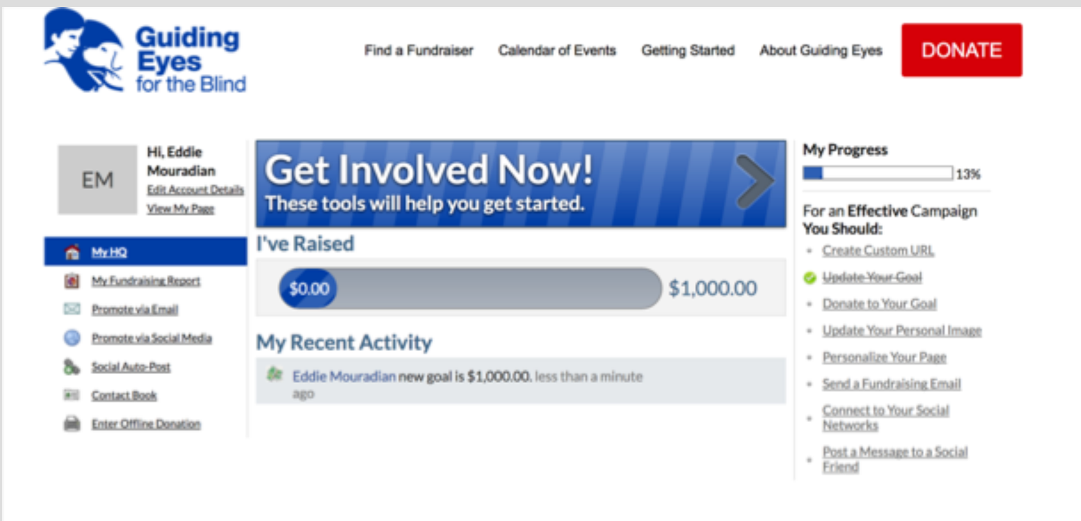
Once you have entered this information, hit “That was quick!”.



Your registration record has been completed. You will now need to move onto the next step, which is answering registration questions and personalizing your fundraising page

FUNDRAISER HEADQUARTERS
TASK LIST & DASHBOARD

On the far right (within the red box) are tasks referred to as “HQ Tasks”, which some may be familiar if they appeared in the pop-up after registration was complete.



Default tasks include:

Upload Photo – upload a profile picture from your computer or use your profile picture from your Facebook or Twitter account. This is the image that will appear on the front page of your site, on the bottom left of the hero image.

Personalize My Page – This will direct you to the front of your site to update your personal page. (pg. 6)

Create Custom URL – Update the URL that will be distributed to your network. Create your own personal URL so it is simple to find you, and easy for you to remember.

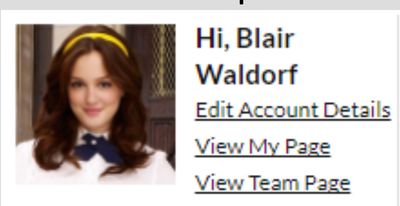
Donate to Own Goal – Lead by example and donate to your cause yourself.

Import Your Contacts – Selecting this task will take you to your contact book (which can also be found on the left hand side of your HQ) – (pg. 7)

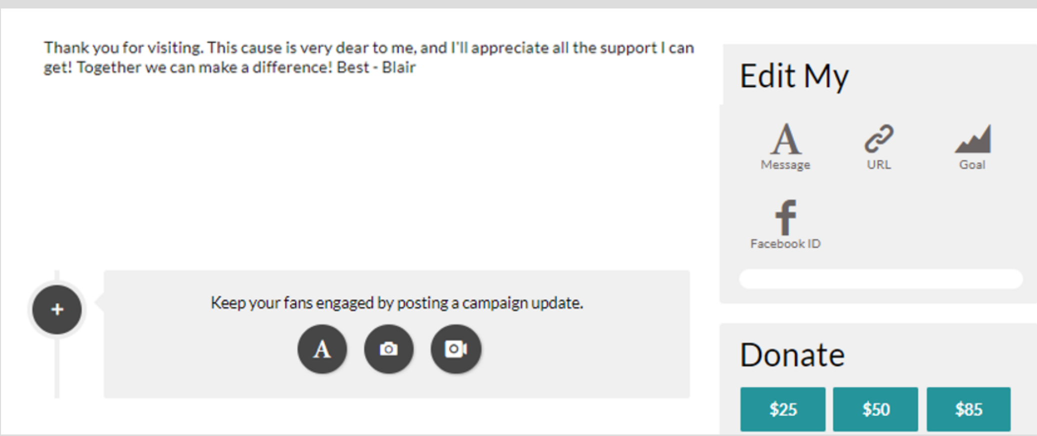
Send a Fundraising Email – Reach out to your donors to encourage them to participate or thank them for their support (pg. 8)

FUNDRAISER HEADQUARTERS PERSONAL PAGE

Personalizing your page is one of the most important things you will do as a fundraiser. The non-profit will have added some defaults but you want to take the extra step to make this page yours!



To edit your personal page, select “View My Page” or “View Team Page” in the upper right-hand corner.

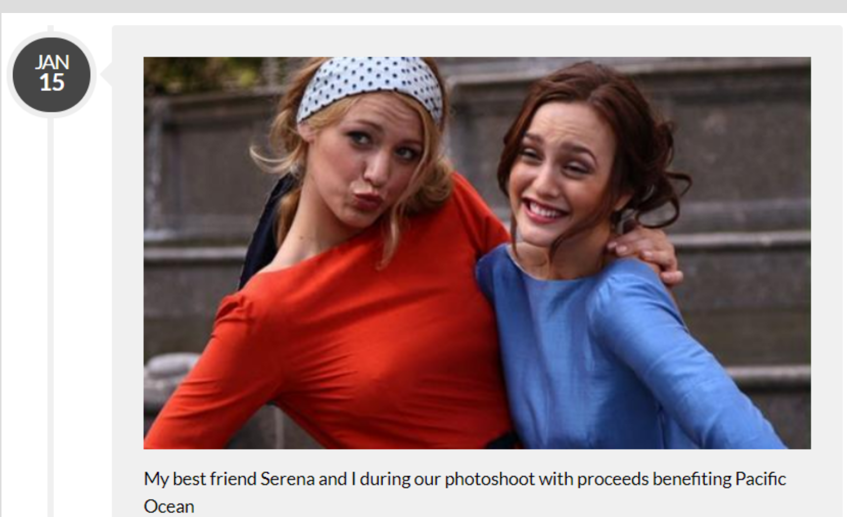


Select “A – Message” to update your Header and the body of your message.

URL – Update the URL that will be distributed to your network.

Goal will allow you to update your fundraising goal.

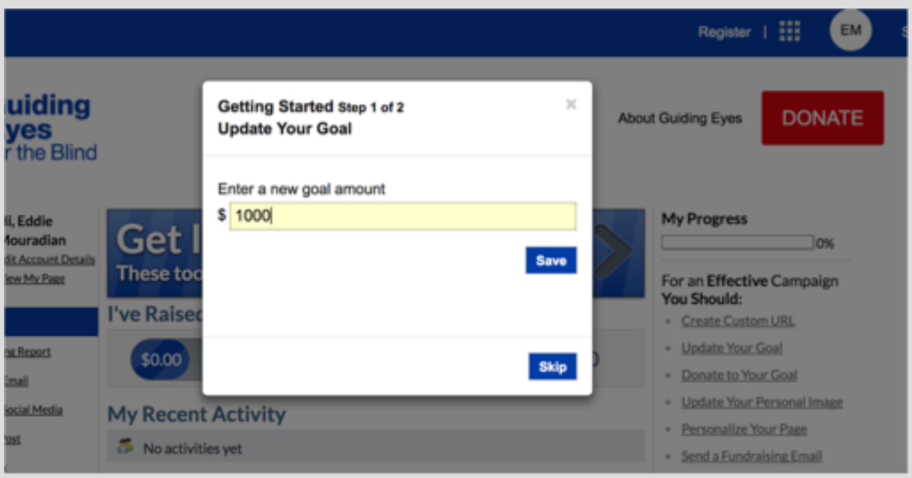
Facebook ID allows you to moderate comments submitted by others on the bottom of your page.

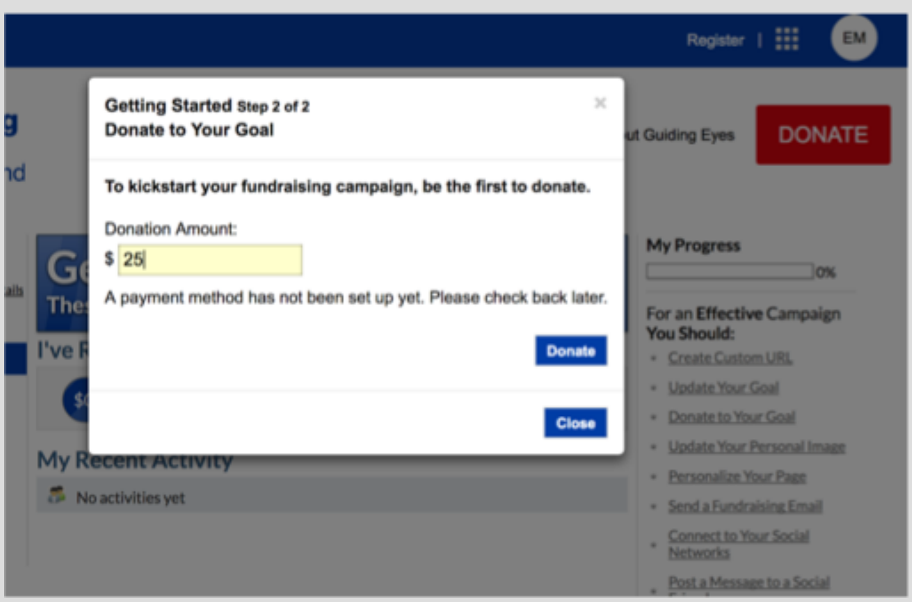


On the bottom of the page is the “Fundraiser Feed”, which is a living, open connection from the fundraiser to their network. Each update to the feed includes a date stamp with content; a text blog, image or video accompanying the post.

STEP 2 & STEP 3:
SET A GOAL
&
DONATE TO YOUR OWN GOAL

After you have logged into the system you will be prompted with tasks to help jump-start your campaign by setting a goal for your event or campaign and to make a self-donation to kick-off your fundraising.

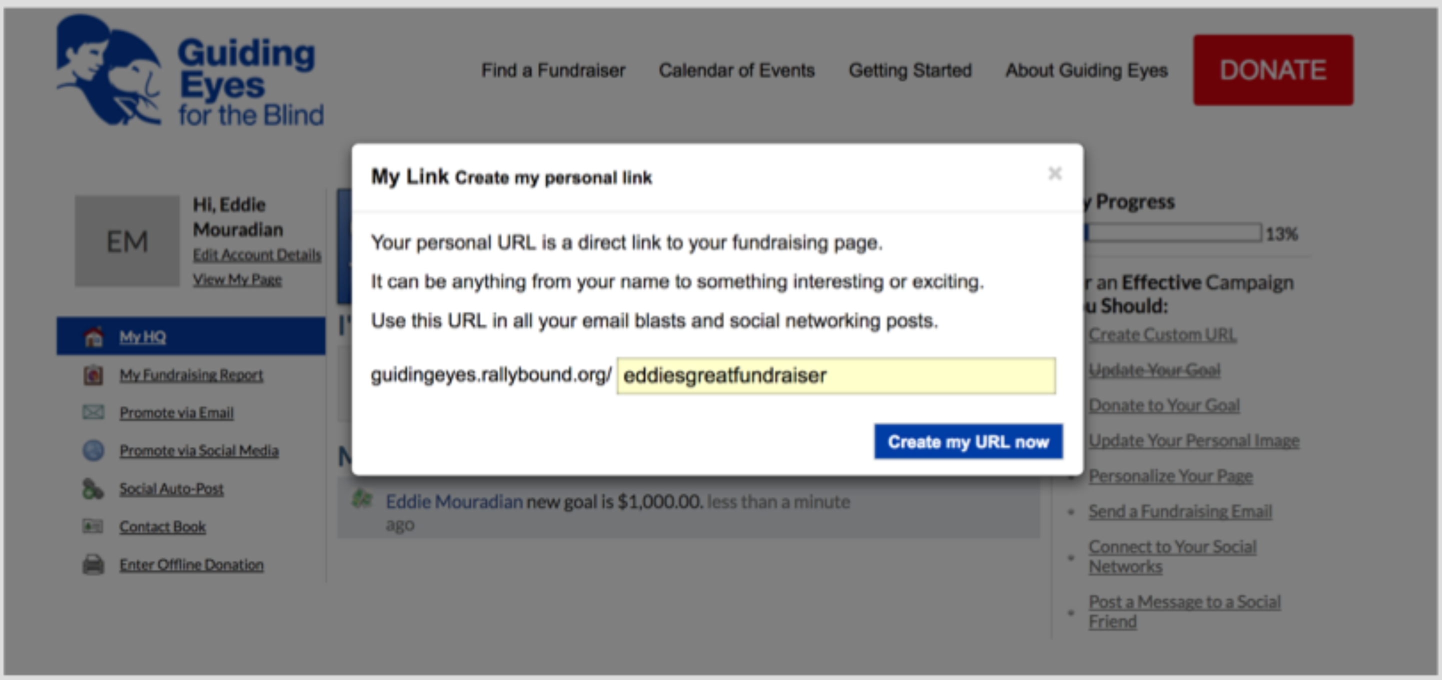




- *You can see how many steps exist by looking at the very top.*
- *If you do not have information for that task you can choose to “Skip” and come back to it at*

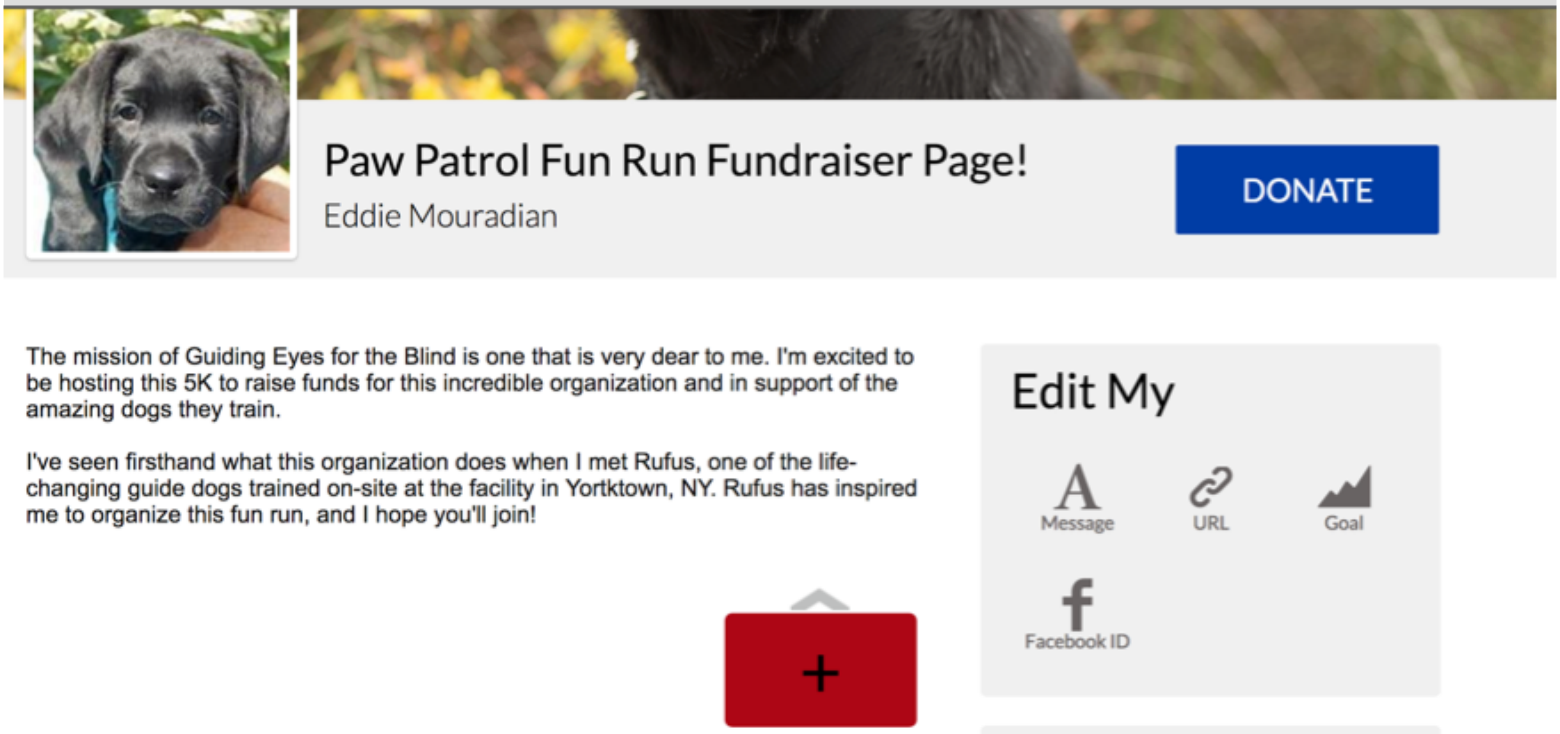
STEP 4:
CUSTOMIZE EVENT URL

A customized URL will make your campaign easier to find, easier to share and much more personal.



STEP 5 & STEP 6:
UPLOAD A PHOTO
&
PERSONALIZE YOUR PAGE

This is the area of your Headquarters where you get to update your website!

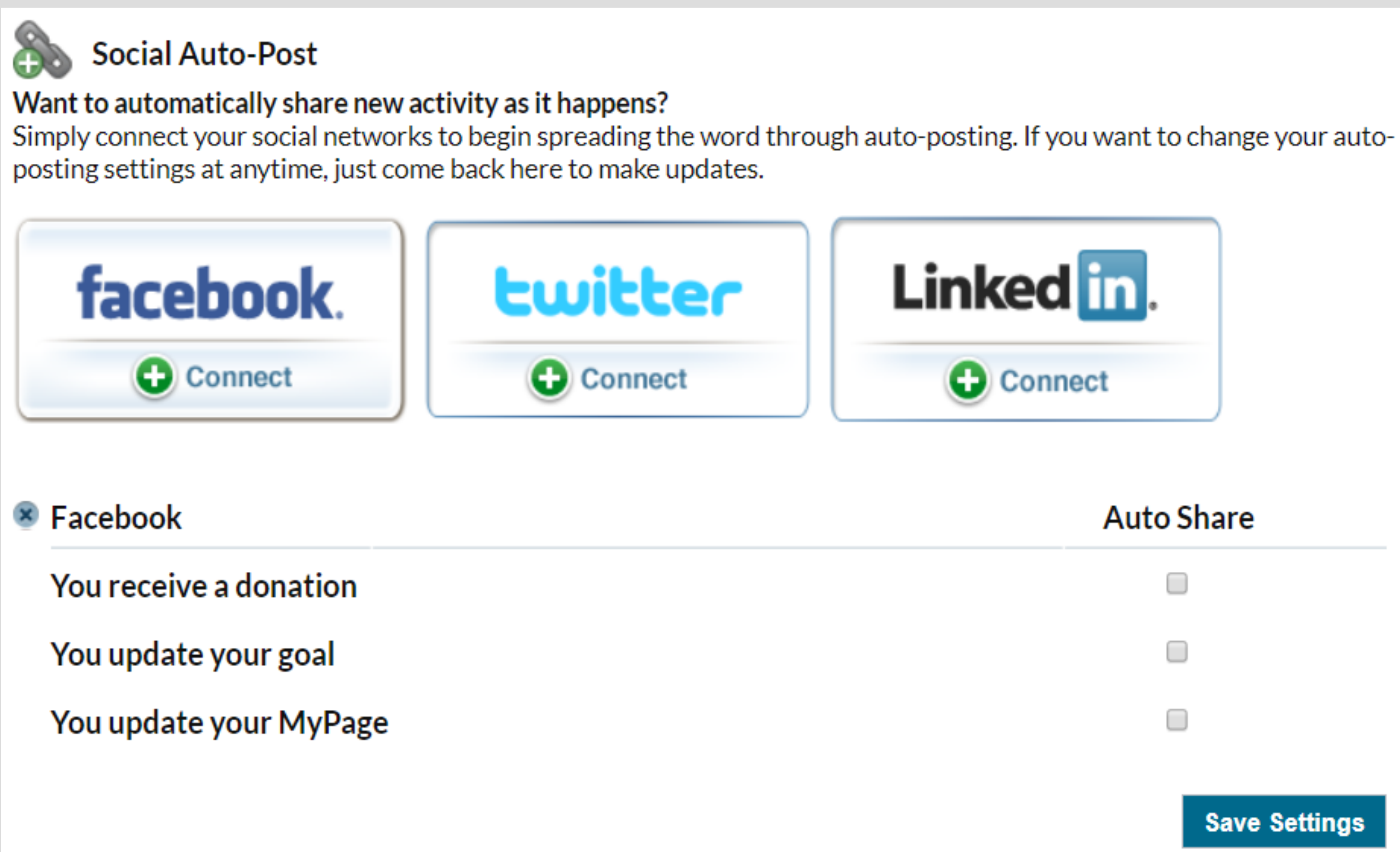


By clicking the plus sign, you can add personalized videos and images to your site to reflect your journey or the

Select "A – Message" to update your Header and the body of your message.
The photo option refers to your profile image.
URL allows you to update your campaign URL.
Goal will allow you to update your fundraising goal.
Facebook ID allows you to moderate comments submitted by others on the bottom of your page.

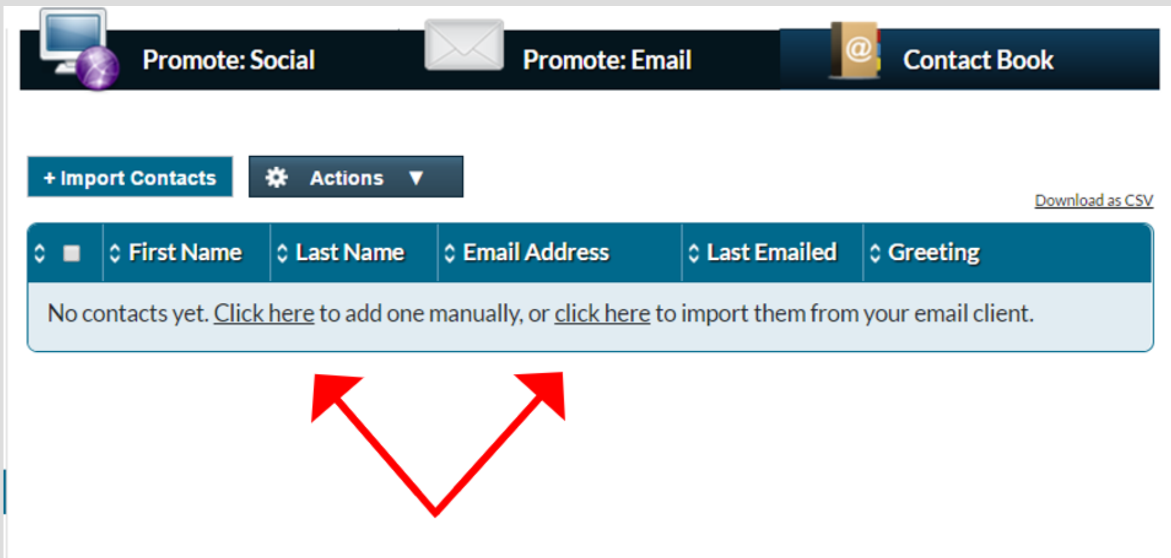
STEP 7:
CONNECT TO SOCIAL NETWORKS

“Promote Via Social Media” allows you to send individual updates, tweets or messages to your network, either through social sites or through email.



Once you have connected your social account you can allow for the non-profit to post to your social sites for various activities you complete.

STEP 8:
IMPORT YOUR CONTACTS



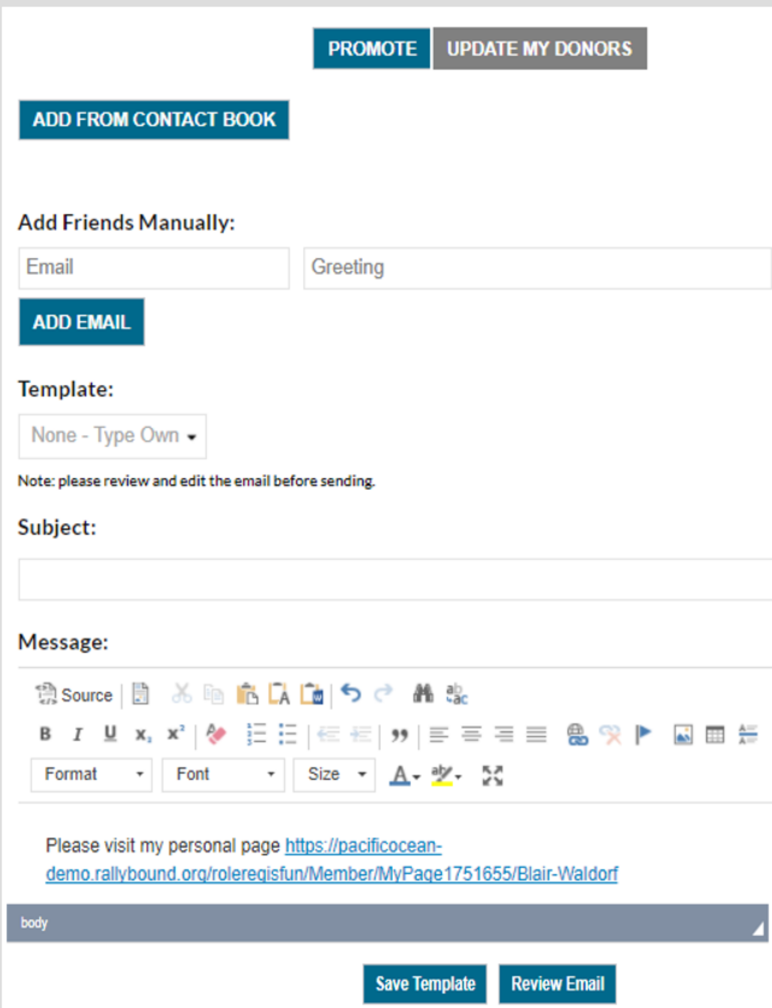
Selecting the task to "Import Your Contacts" will take you to your contact book.

From here you can load your contacts to start promoting your campaign. Add contacts individually with their email address by selecting "Click here". To import contacts from your personal email, select "Click here" and choose the appropriate email client. You can also upload through a CSV file.

This will allow you to share your fundraising page with family, friends, colleagues, neighbors, co-workers and your community.

STEP 9:
SEND A FUNDRAISING EMAIL

As a fundraiser your email must be verified before you are able to send emails out through the system. This is to help improve email deliverability. If your email has not been verified there will be an option to send the “Verification Email” again so you have the ability to send emails through RallyBound.



Send emails directly from your contact book or by manually entering their email address. You can also send messages directly to your donors by selecting “Update my Donors”.

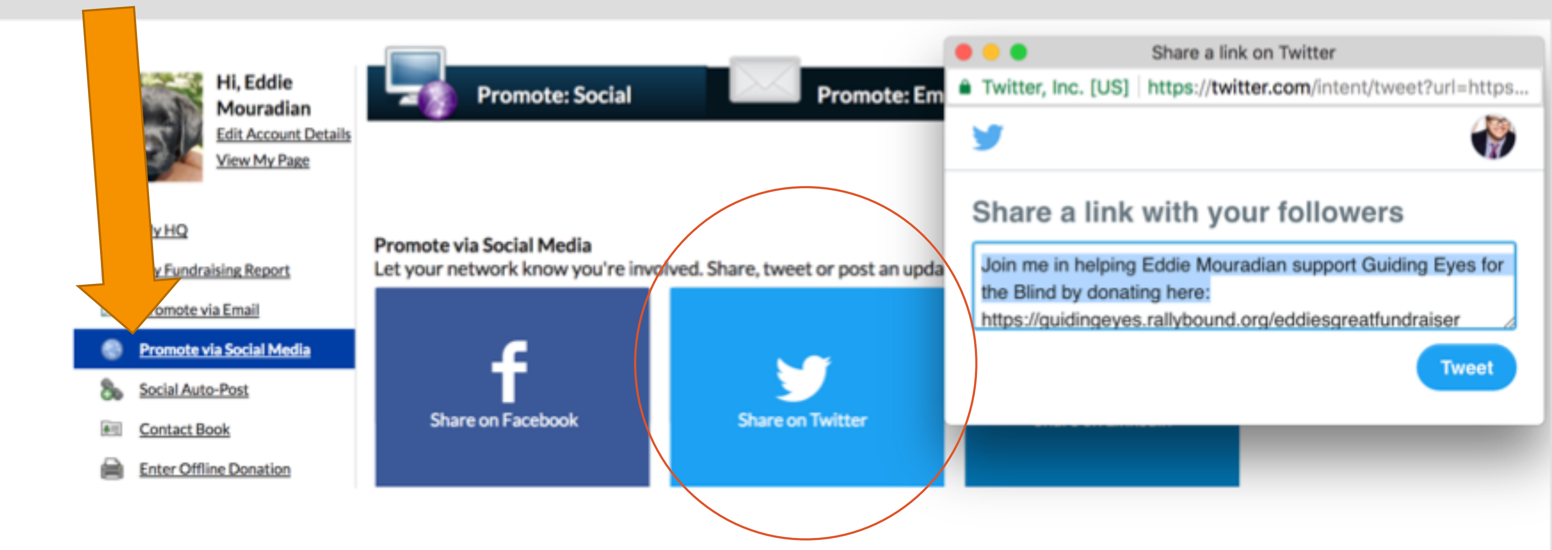
Once you have your audience you can select an available email template (a preset email message) by clicking the down arrow under the template box. When a template is selected a subject and message will be entered which can then be customized.

Alternatively you can create your own email message from scratch. If it’s a message you think you’ll re-use you can create your own email template by selecting “Save Template”.

When your message is complete select “Review Email” which will allow you to see what your message will look like to recipients.

STEP 10:
POST A MESSAGE ON SOCIAL MEDIA

You can share your event page on Facebook, Twitter or LinkedIn with just the click of a button.



You can also set –up Social Auto Posts so that all your progress with your event are posted without you having to do anything!