

CompassCare Walk Participant User Guide

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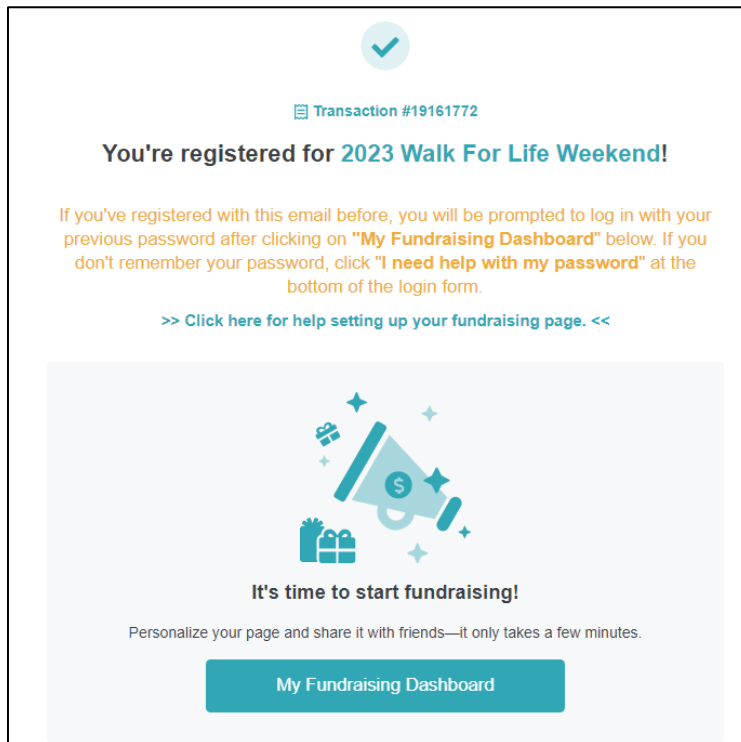
As a registered participant of this event, you have a variety of tools at your fingertips to help you reach your goals! Your fundraising center will be the hub for managing your involvement and fundraising activities.

Registering

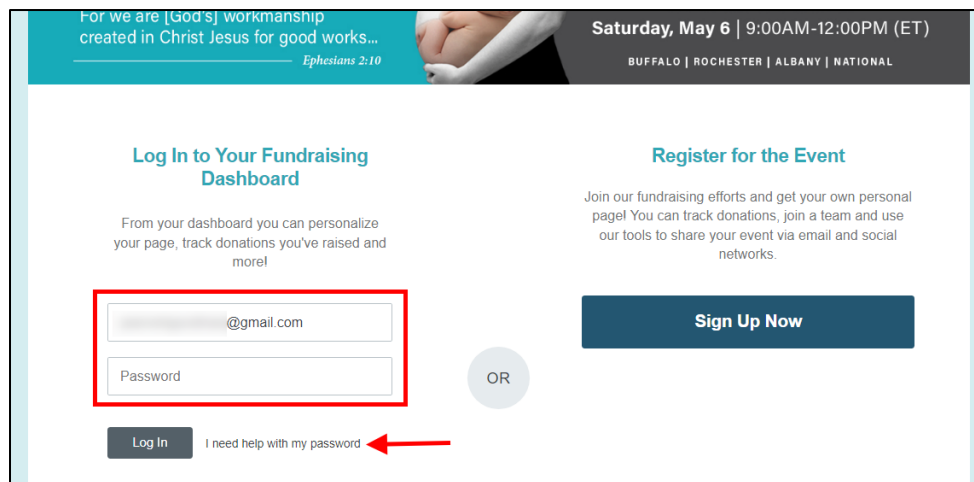
Returning Participants

If you use the same email to register as you have in the past, our system will remember you!

Once you've completed the registration form, you will see the following page. Click **My Fundraising Dashboard** to be taken to your login page.



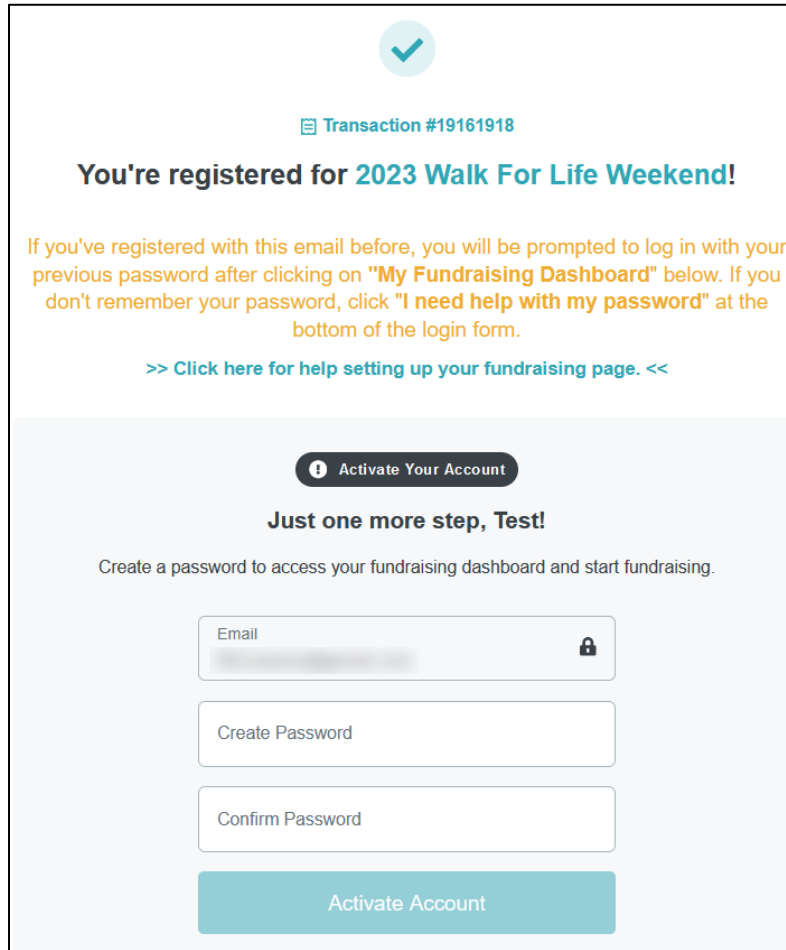
Enter your password to complete the login process, or if you can't remember it, click "I need help with my password" to reset it. Note that your **email** can't be edited at this point.



You'll be taken to your Fundraising Dashboard to complete your profile (if you've been invited by personalized link, you will see your customizations from the previous year).

First-Time Registrants

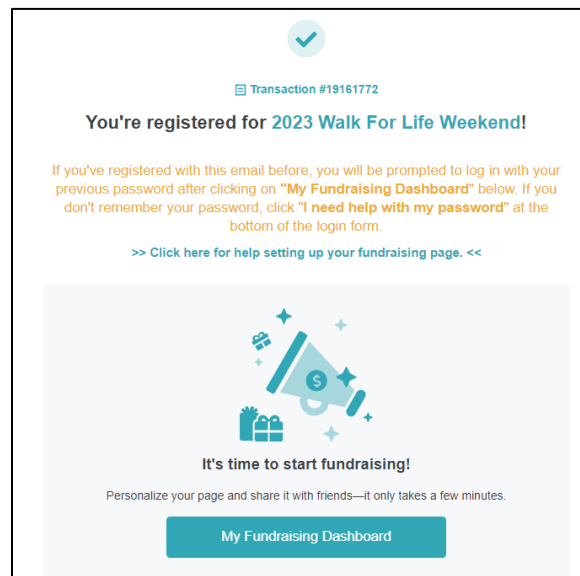
Once you've completed the registration form, you will be asked to select a password for your fundraising account.



The screenshot shows a confirmation page for account registration. At the top, there is a green checkmark icon and the text "Transaction #19161918". Below this, the heading reads "You're registered for 2023 Walk For Life Weekend!". A paragraph of text explains that if the user has registered before, they will be prompted to log in with their previous password after clicking on "My Fundraising Dashboard". It also provides a link for help setting up the fundraising page. The main section is titled "Just one more step, Test!" and includes a sub-heading "Create a password to access your fundraising dashboard and start fundraising." Below this are three input fields: "Email" (with a lock icon), "Create Password", and "Confirm Password". At the bottom of this section is a large teal button labeled "Activate Account".

Enter your preferred password and click **Activate Account**.

You'll then see the following message. Click **My Fundraising Dashboard** to be taken to your fundraising page.



The screenshot shows a confirmation page for account registration. At the top, there is a green checkmark icon and the text "Transaction #19161772". Below this, the heading reads "You're registered for 2023 Walk For Life Weekend!". A paragraph of text explains that if the user has registered before, they will be prompted to log in with their previous password after clicking on "My Fundraising Dashboard". It also provides a link for help setting up the fundraising page. Below this is a decorative graphic with a gift box, a dollar sign, and stars. The text "It's time to start fundraising!" is displayed, followed by the sub-heading "Personalize your page and share it with friends—it only takes a few minutes." At the bottom is a large teal button labeled "My Fundraising Dashboard".

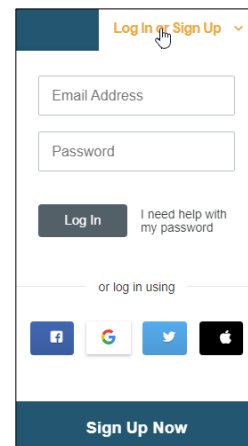
Logging In

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 "I need help with my 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.

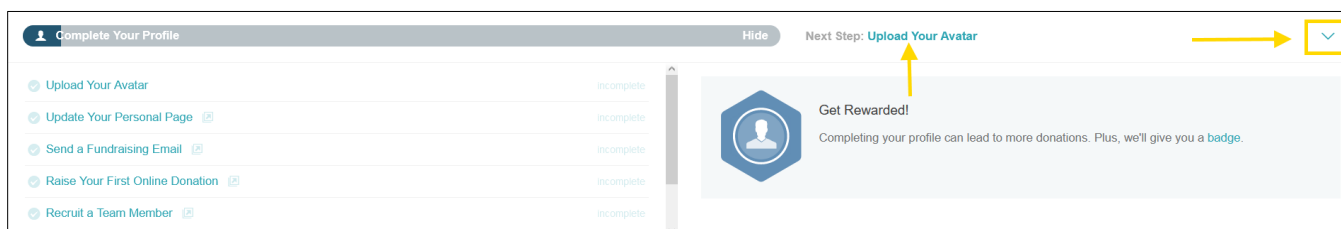
HINT: Usernames are always email addresses.



The screenshot shows the top right corner of the website. It features a dark blue header with the text "Log In or Sign Up" and a dropdown arrow. Below this are two input fields: "Email Address" and "Password". A "Log In" button is positioned to the left of a link that says "I need help with my password". Below these fields is the text "or log in using" followed by social media icons for Facebook, Google, Twitter, and Apple. At the bottom of this section is a dark blue button labeled "Sign Up Now".

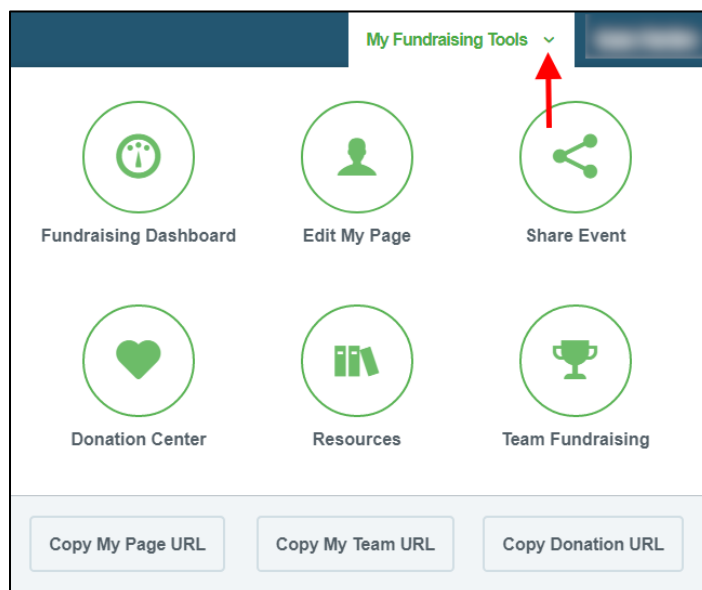
Setting Up Your Fundraising Page

You'll be prompted to begin the Welcome Quest as soon as registration is completed. The Welcome Quest is located at the bottom of the page and is designed to help walk you through the main components of your **Fundraising Dashboard**. As a bonus, you'll receive a badge upon completion. To get started, click on the next suggested Welcome Quest item and the system will guide you through it from there, or click the carrot icon to open the pop-up area and select items from the left.



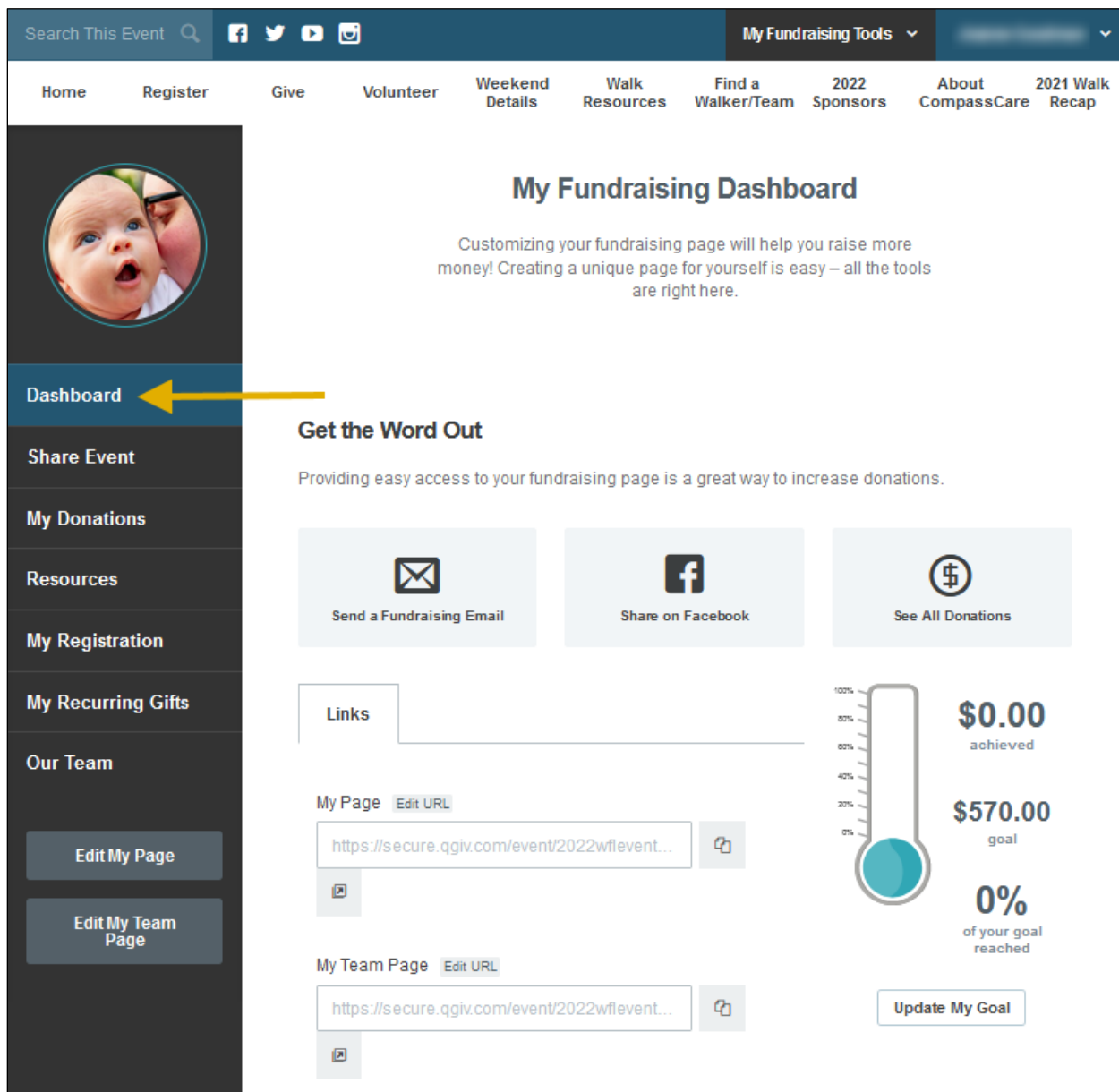
My Fundraising Tools

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

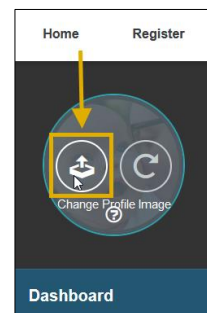
You may also navigate between the different areas of your fundraising center via your **Fundraising Dashboard**. You'll see a menu down the left side that contains the same navigation items as your **My Fundraising Tools** dropdown, along with a few additional options/pieces of information.



Personal Avatar

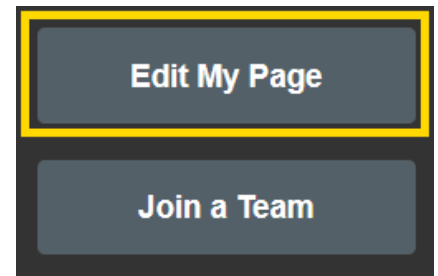
The avatar will be used on your personal fundraising page and throughout the system on activity feeds such as leaderboards, recent activity feeds, etc. By default, the avatar contains a default image.

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.




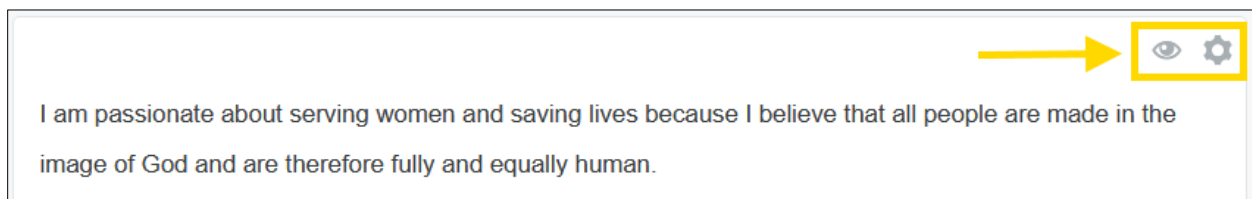
Edit My Page


The **Edit My Page** button will take you to the content management system, allowing you to customize the look of your fundraising 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.



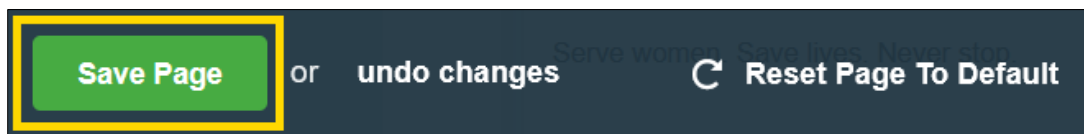
After you click the **Edit My Page** button you'll see a number of boxes that allow you to customize your page. These boxes are called widgets.

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.

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

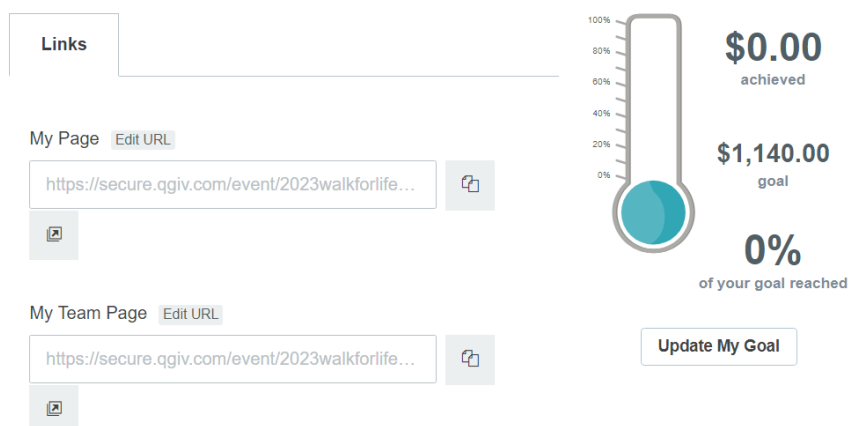


Undo changes will undo anything that you've not yet saved, and **Reset Page to Default** will take the page back to the default settings defined by the admin.

Links

My Page: This is your fundraising page URL. You can edit URL if you're interested in appending something to the end. You can 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!

My Team Page: This is your team fundraising page URL. You can only append this URL if you are the Team Captain.



Section	Item	URL	Action
Links	My Page	https://secure.qgiv.com/event/2023walkforlife...	Edit URL, Copy
	My Team Page	https://secure.qgiv.com/event/2023walkforlife...	Edit URL, Copy

100%
80%
60%
40%
20%
0%

\$0.00
achieved

\$1,140.00
goal

0%
of your goal reached

Update My Goal

Thermometer

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.

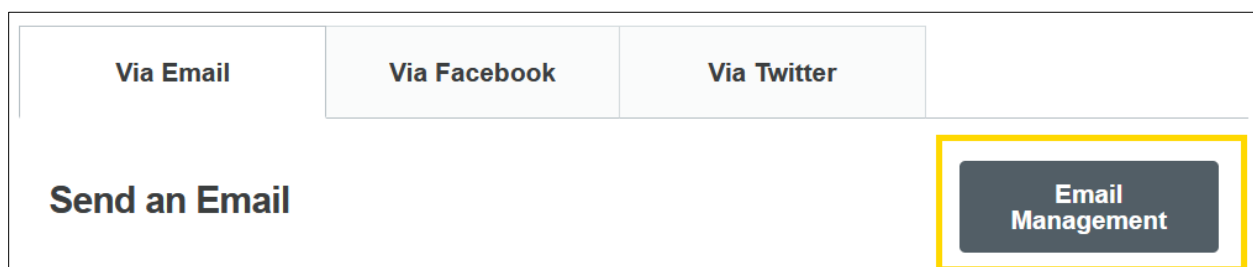
To the left of the thermometer is your fundraising table, which breaks down the types of donations you've received. This makes for easy tracking!

Share Event

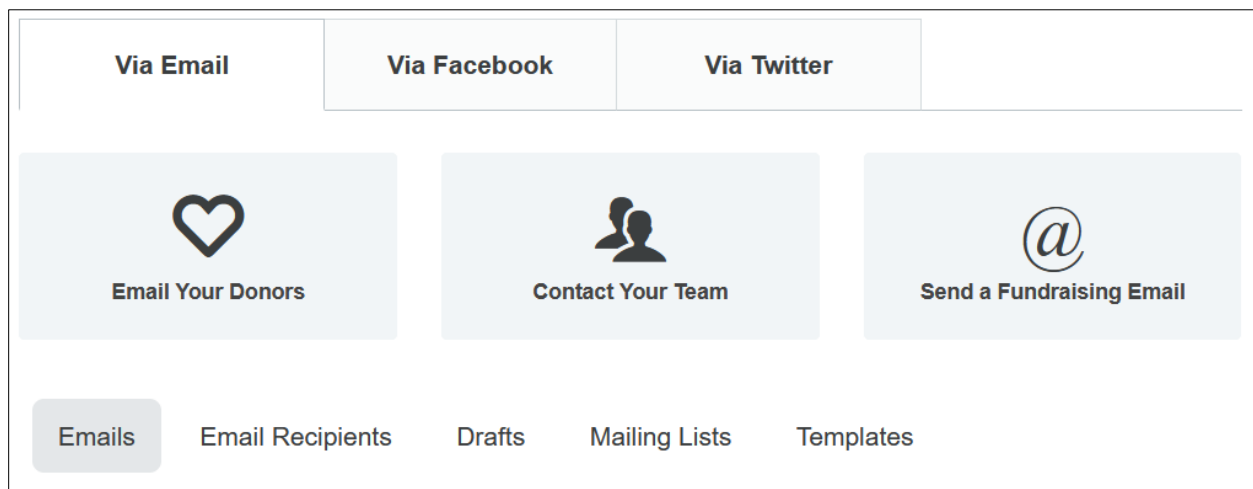
Earn more donations by sharing your event with friends and family! In this tab, you're given the tools to share the event and your personal and team pages via email and social media.

Share Using Email

The **Via 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, Email Recipients, Drafts, Mailing Lists, and Templates tabs, click the **Email Management** button.



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.

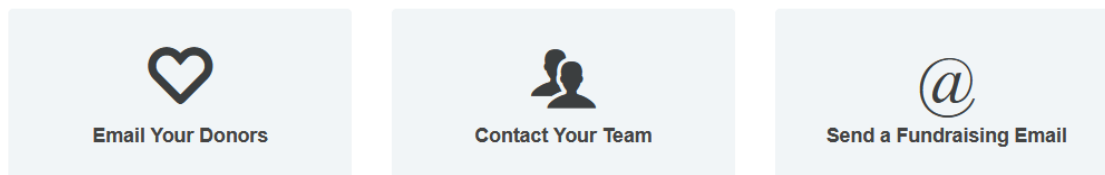


Creating a Mailing List

1. Click the Mailing Lists tab and choose **+ New List**.
2. 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.

Creating an Email

1. 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.

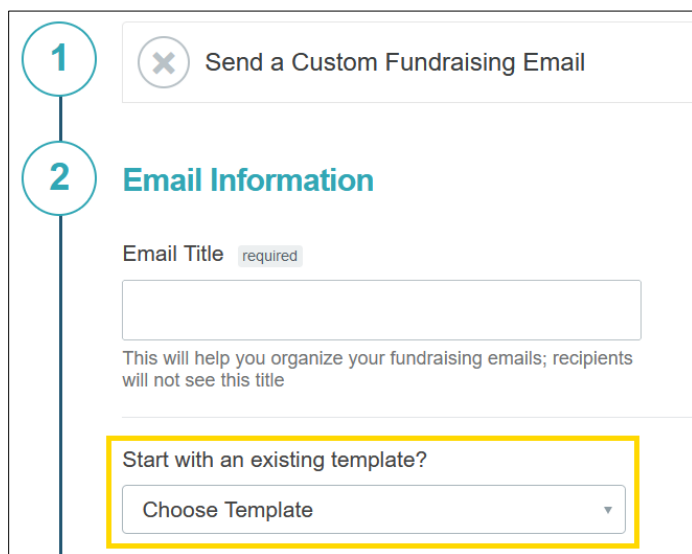


You may or may not see all of the above options. This will depend on if you have any donors at the time you're sending the email and/or if you're part of a team.

Email My Donors: Email anyone who has made a donation to your page.

Email Team Members: Email any of your current team members.

2. 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.

A screenshot of a web interface for creating an email. At the top, a button labeled "Send a Custom Fundraising Email" is visible. Below it, the "Email Information" section is shown. It includes a text input field for "Email Title" with a "required" label. Below the input field is a note: "This will help you organize your fundraising emails; recipients will not see this title". A yellow box highlights a dropdown menu labeled "Start with an existing template?" which currently shows "Choose Template".

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.

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.

Select Mailing Lists

Select list(s)...

Import Additional Addresses Show Users

When Should We Send This Email?

Immediately

Goal Percentage Reached

Send on specific date

Periodically

- 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.

Goal Percentage Reached: 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.

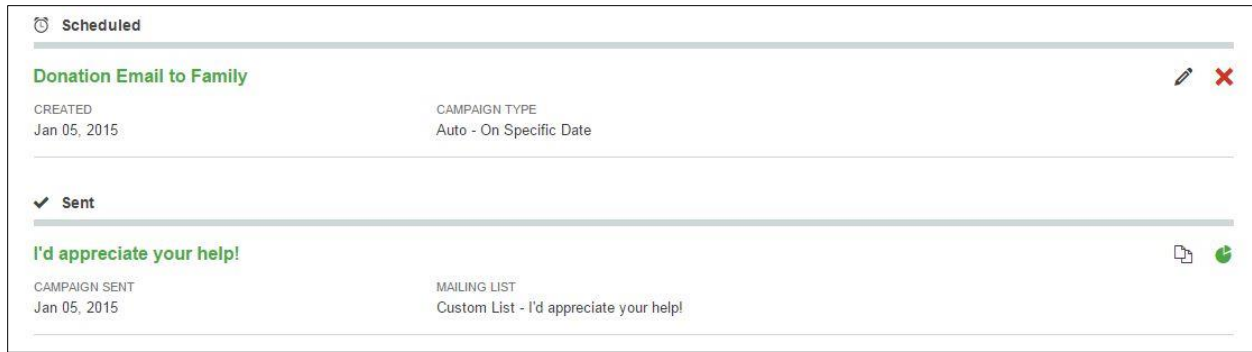
Send on Specific Date: Define a date and time to send the email if you're not interested in sending it immediately.

Periodically: 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 piece 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.



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

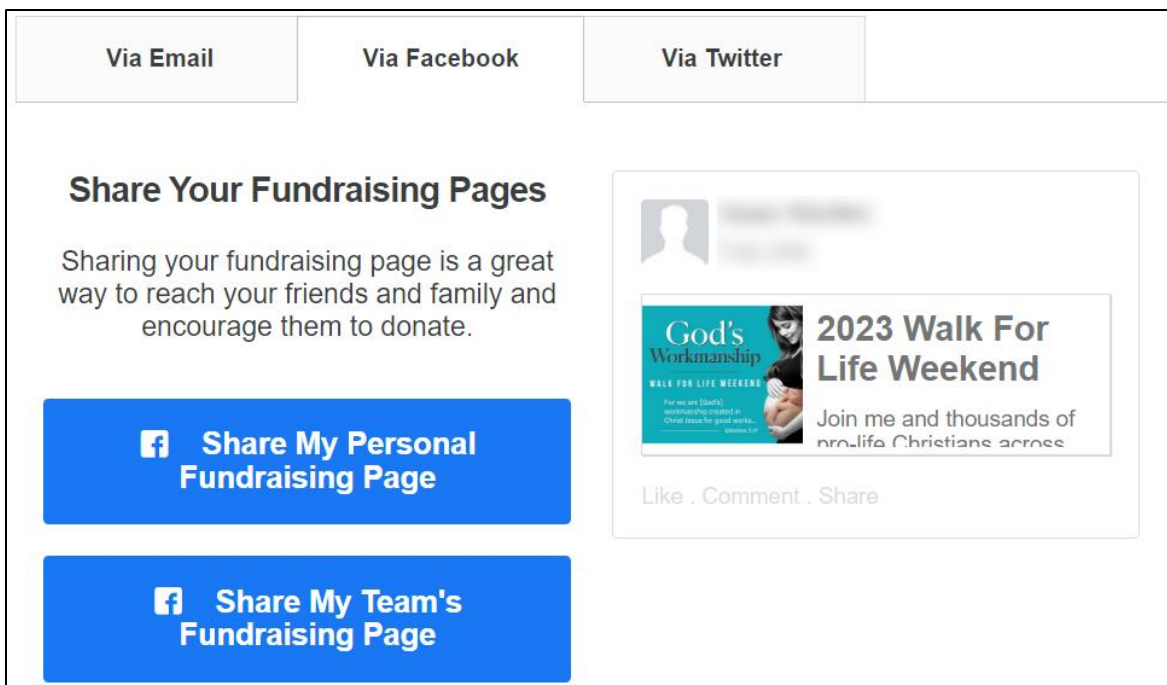
If you'd like to create your own email templates for use within campaigns, you're able to create and manage these in the **Templates** tab in the **Email Management** section of **Share Event**.

Creating your own template is easy!

- Click on the **+New Template** button and enter a Template Name, along with a Subject and Body content.
- Once you're happy with what you've entered, click the **Save Template** button at the bottom of the body content box.
- 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 **Via Facebook** tab share your fundraising page or team page with your Facebook followers. In this tab, you'll see a large blue button inviting you to do so.



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.

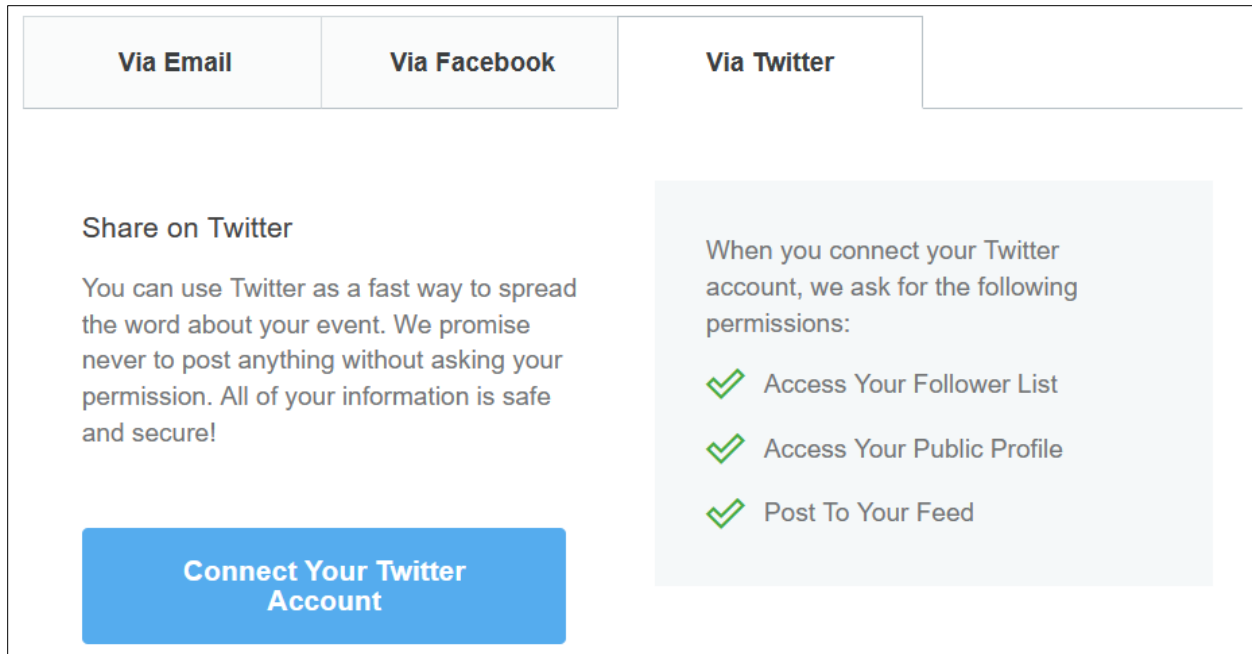
You can share your Personal Page or if you are on a team, your **Team Page**. Add your personal message and post.

Share on Twitter

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

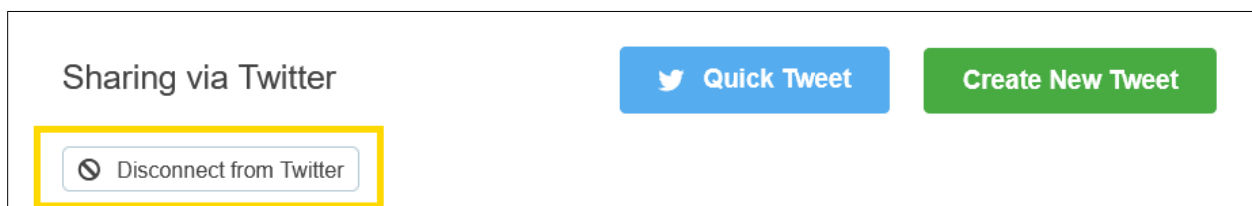
Connecting with Twitter is a great way to reach your network of family and friends to spread the word. This tool will allow for manual and automatic posting to make sharing much easier. In order to allow the fundraising center to interact with your personal Twitter page, you **MUST** connect your Twitter account.

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



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.

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.
- **Send on Specific Date:** This option 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.
- **Periodically:** This option 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.

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 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.

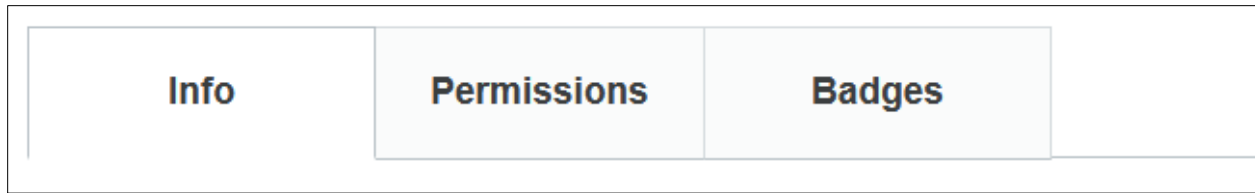
Any offline gifts you enter will be listed in your Donations Received table with their current status and the ability to resend the thank-you email , edit the gift , or delete the gift .

Resources

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

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.



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

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	

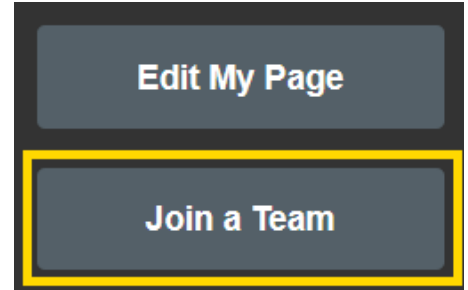
Our Team/Join a Team

Join a Team

This button will take you to a screen where you can search for teams from a list of existing teams, create your own team, or edit your team page.

If you're on a team but not the Team Captain, the button will say **Our Team** (and 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. [Learn more here.](#)

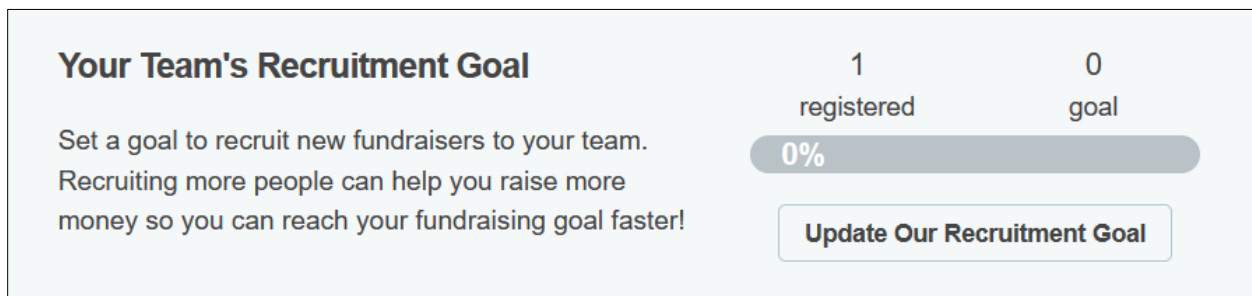
If you're on a team, you can manage your team by clicking on the **Our Team** navigation item in your fundraising dashboard. If you're not part of a team and would like to join or create one, click the **Join a Team** button.



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.

If you're the **Team Captain**, 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.

A screenshot of the "Your Team's Recruitment Goal" interface. It features a title "Your Team's Recruitment Goal", a sub-header "Set a goal to recruit new fundraisers to your team. Recruiting more people can help you raise more money so you can reach your fundraising goal faster!", and a progress bar showing "0%". The progress bar is flanked by "1 registered" and "0 goal". Below the progress bar is an "Update Our Recruitment Goal" button.

Your Team's Recruitment Goal

Set a goal to recruit new fundraisers to your team.
Recruiting more people can help you raise more money so you can reach your fundraising goal faster!

1 registered 0 goal

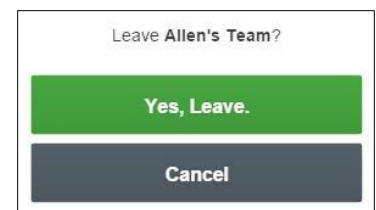
0%

Update Our Recruitment Goal

You'll see the following additional options as a member of a team.

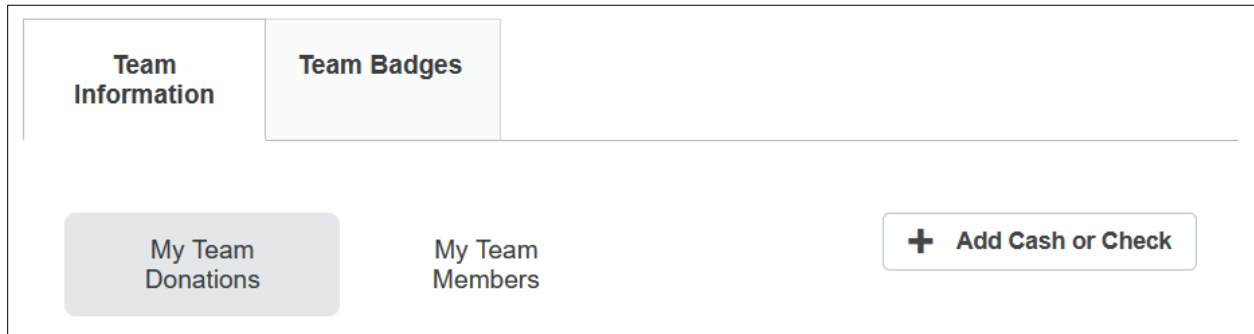


- **View Team Page:** This will display the Team Fundraising Page
- **Ask Others To Join:** This will take you to the Share Your Event tab to create an email inviting others to join your team.
- **Change Teams:** This will take you to an interface that allows you to search and join another team, leave 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 can toggle between the two areas to view listings of anyone who has donated to the team and all fellow members of your team.

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

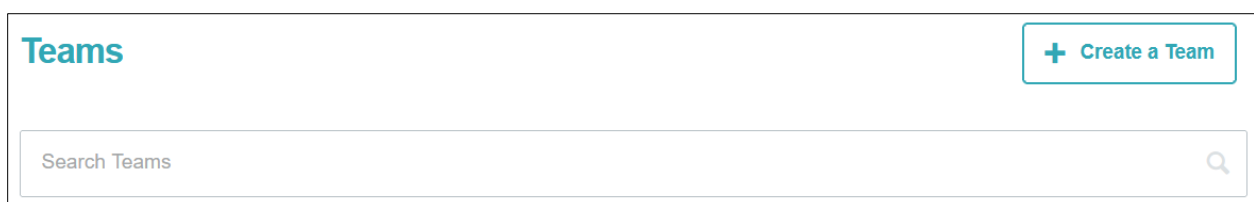
As a Team Captain, you're able to add offline team donations, if enabled by your admin. If you have a cash or check donation to add, click the **+ Add Cash or Check** button (pictured below) and enter the information for your donor.

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. Any online donations made by donors who chose to remain anonymous will display as "Donor chose to be anonymous to the public" in your dashboard.

Join a Team/Create a Team

Join a Team

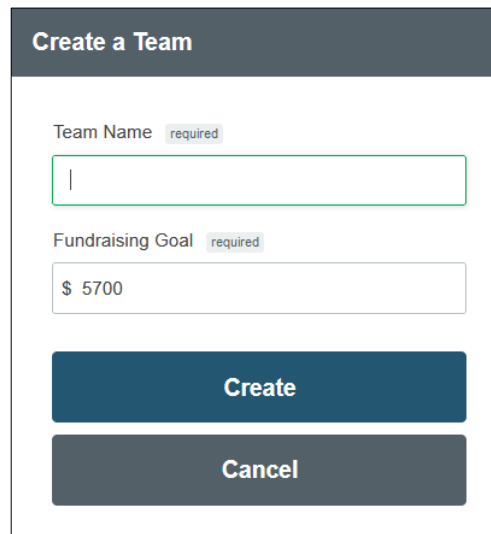
Clicking this button will take you to a page where you can search for and join existing teams, or create a new team if you're registered as an individual.



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.

Create a 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.



The screenshot shows a 'Create a Team' modal form. It has a dark header with the title 'Create a Team'. Below the header, there are two input fields. The first is labeled 'Team Name' with a 'required' tag and contains a single vertical bar character. The second is labeled 'Fundraising Goal' with a 'required' tag and contains '\$ 5700'. At the bottom of the form are two buttons: a blue 'Create' button and a grey 'Cancel' button.

Logging Out

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.

