

Now what?

Now that you've registered, what is your next step? That is exactly what this manual is going to cover. The first thing you will want to do is to personalize your webpage. Personalizing your page helps people see and understand why this is important to you. Forging that personal connection is an important step in fundraising.

Your next step is to populate your address book. You can import contacts from a CSV file or you can copy them over from an online email account. Once your address book is set, your next step is to email your friends and family. Each email will contain a link back to your personal fundraising page.

It is quick and easy! Once you have sent out your email, you can check your progress towards your fundraising goal and follow-up with your contacts.

Why Fundraise Online?

Online fundraising is a great way to reach out to your friends and family and give them the opportunity to support your efforts. Online fundraising tends to bring in **four times** the amount that offline fundraising does. Additionally, people that give online tend to give higher donations (because they can give what they want to, rather than just what is in their pocket at that time). That means that this is a great way to fundraise and reach new goals.

Participant Center

The Participant Center has drastically changed from last year. We have updated many of the feature and function to make it easier to use and more effective.

Use the links at the top of the page to load a section of the Participant Center.

Check your progress meter will keep you up-to-date on how your fundraising efforts are going.

"What to do next?" will prompt you as to the next suggested step(s) in your fundraising efforts.

American Diabetes Association
Tour de Cure

HOME EMAIL PROGRESS PERSONAL PAGE

Overview

Progress

\$0.00 \$200.00 0%

What to do next? You have not sent any messages. You should email your contacts.

Welcome, Chris, to your **Tour Center!** (registered for more than one Tour de Cure event? [Click here](#) to select which Participant Center to view.)

What should I do first? Use your Tour Center to invite everyone you know to support your participation in Tour de Cure. Ask your friends, family, co-workers, neighbors and businesses you frequent to make a donation or ride with you. They'll want to help you reach your goal!

Your Tour Center makes it easy to send emails and track your progress

How easy? We've already created a personal page for you! Follow these easy steps:

- Customize your page—upload a photo, choose colors and write your own content (or leave it as is)
- Upload your contacts address book
- Send a donation request email to everyone at once
- Watch your thermometer grow as the donations come in!
- Send thank you messages

Don't forget * - save frequently as you go.** Typing does not count as "activity" so don't compose your messages in the Tour Center itself. It times out to protect your personal information online.

- View your [Personal Page](#) as it appears to your visitors!
- View the [page information page](#) for this event.
- [Update](#) your account/contact information.

Follow the "What I Should Do Next?" area located at the top of each page; it will take you step-by-step into various activities you can do online.

Have a question? View our [Frequently Asked Questions](#) page.

Want to Join or Form a Team?

If you are registered as an individual and would like to form a team or join an already existing team, please send a detailed message with your name, address and team name to tourdecur@adadirect.com

Resources

- Our [training page](#) will help you get trained to ride the distance on event day
- Our [fundraising guide](#) is full of tips on ways to raise funds both offline and online
- [Print Fundraising with Facebook Leaflet!](#) Add the Tour de Cure boundlessFUNDRAISING™ application to your Facebook page, to easily extend your fundraising efforts to your networks of friends on Facebook.

fundraise with facebook

My Tour de Cure Event Information

Need Help?
If you are having trouble getting our support personnel are here directly for assistance or use the

Date: June 5, 2011
Start Location: Reston Town Center
Event Manager: Brandon Foley
Email: bfoley@adadirect.com

Send email

Quick Link 1: Want to get moving quickly? Click here to jump straight to your email.

Quick Link 2: Go straight to your contacts and upload your address book.

Quick Link 3: Enter your offline donations!

Use our Boundless Fundraising application to raise money on facebook and publish your progress to your news feed.

Quick Link 1: Want to get moving quickly? Click here to jump straight to your email.

Quick Link 2: Go straight to your contacts and upload your address book.

Quick Link 3: Enter your offline donations!

Use our Boundless Fundraising application to raise money on facebook and publish your progress to your news feed.

Personal Fundraising Page

Your personal page is the place to tell people why you are involved and fundraising. You can write your own story as well as post pictures or link to online videos. When you email your donors, your letter will contain a link back to your personal page. The content you include here can help encourage them to donate by showing your personal connection.

1. Click "Personal Page" to edit your fundraising page.

2. Click "Edit" here to personalize your page's web address or to set your page to private. This means that no one will be able to search for your page from the Step Out web site.

3. Personalize your page's title and content. Tell your story and reach out to your donors. Once you're done, click "Save".

4. Choose the layout of your page and the number of photos you'd like to include.

The screenshot shows a navigation bar with 'PERSONAL PAGE' circled in red. Below it is the 'Content' section with a title 'Welcome to My Tour de Cure Web Page!' and a rich text editor containing text about diabetes. A 'Page Layout' dropdown menu is open, showing options like 'Single Photo/Status block inset' and 'Two Photos Left'. A 'Save' button is visible at the bottom of the editor.

5. Click the Photos/Video option to upload pictures or link to an online video.

You can upload up to two pictures for your page.

If you select the video option you will not be able to use pictures, but you will be able to link to a video on youtube or another hosting site.

The screenshot shows the 'Photos/Video' section with a 'Photos' radio button selected. There are two upload forms, each with a 'Browse...' button, a 'Caption' field, and a 'Save/Upload' button. A 'Video' radio button is also visible at the bottom left.

Select the "Components" option to change the settings of the plug-ins on your page.

Components

- Status Thermometer** Thermometer showing percent to personal fundraising goal.
- Fundraising Honor Roll** Scrolling list of largest donations received.
 - Show donor names only (do not show amounts)
- Enable Personal Blog** Allows you to post updates when viewing your personal page.

[Save](#) [Preview](#)

The Preview will open in a new window but will not save your changes.

1. Uncheck the box beside "Status Thermometer" if you choose not to have one displayed on your page.

2. Uncheck the box beside "Fundraising Honor Roll" if you do not want to have a scrolling list of your donors.

3. Check the third box if you wish to keep a personal blog of your fundraising. Use it to keep all your friends and family updated on your progress and your training rides.

4. Click "Save" once you've made your selections.

Team Page

Team Captains will have an additional page which will allow them to access and edit the team's fundraising page. Use this page to tell your team's story, as well as to get people excited and motivated to be a part of your team and help you reach your fundraising goal.

HOME EMAIL PROGRESS PERSONAL PAGE **TEAM PAGE**

Content

Team Page URL ([Edit](#) | [View](#))

Body

Font family Font size **B** *I* U ABC [List Icons]

Welcome to our Tour de Cure team page!
We are determined to reach our team goal one rider at a time.

Why Ride?
On behalf of the millions of Americans with diabetes and their families and friends, we are counting on you to help our team make a difference! The funds we raise will support the American Diabetes Association's important research, information and advocacy efforts and its mission: to prevent and cure diabetes and to improve the lives of all people affected by diabetes.

Join our Team!
If you choose to ride with us, you'll get to take part in a fun, exciting, healthy event for the whole family. You

Photo

[Browse...](#)

Caption

[Save/Upload](#)

[Save](#) [Preview](#)

The Preview will open in a new window but will not save your changes.

1. Personalize the web address of your team's page. This will give you a short and simple address you can use to direct people to your team's page.

2. Edit your content. Tell the story of your Team and get people excited about your involvement!

3. Upload a picture of your Team. Show off your group!

4. Remember to save your changes.

Uploading Your Address Book

Your address book is a quick and easy way to keep track of your contacts. You can create groups, select specific contacts to email, as well as filter your contacts based on how they've interacted with you in the past. Use email groups to create a way to reach out to segments of your address book easily. Create a group for you coworkers, family and friends. We speak to our friends differently than our coworkers and this will allow you to tailor your messages to do exactly that.

Clicking "Contacts" will allow you to add to, edit and organize your address book.

1. Click "Add a contact" to add a new person. Or click "Import Contacts" to copy an existing address book. Use "Upload Contacts" to upload a custom CSV file.

2. Use the "Add to Group" feature will allow you to create groups and add in your contacts.

3. Use the check boxes beside each name to add multiple contacts to a group at once, select multiple contacts to email at once or to delete multiple contacts at once.

Navigation: [HOME](#) **EMAIL** [PROGRESS](#) [PERSONAL PAGE](#) [TEAM PAGE](#)

Search **contacts** by name or email

(Select [visible](#) or [none](#))

View by Group: [Donors](#) [Unthanked Donors](#) [Need follow-up](#) [Never Emailed](#) [Teammates](#) [Show more groups](#)

Name	Email	Amount	Groups
<input type="checkbox"/>	bba	\$0.00	Need to Donate
<input type="checkbox"/>	cbry	\$0.00	Need to Donate
<input type="checkbox"/>	chris	\$0.00	Need to Donate
<input type="checkbox"/>	phel	\$0.00	Need to Donate
<input type="checkbox"/>	Allison allis	\$0.00	Need to Donate
<input type="checkbox"/>	Aron Agerton west	\$0.00	Need to Donate
<input type="checkbox"/>	Jill Ammon jam	\$0.00	Need to Donate
<input type="checkbox"/>	Megan Arradondo mes	\$0.00	Need to Donate
<input type="checkbox"/>	Chad Barger chac	\$0.00	2009 Donors, Need to Donate
<input type="checkbox"/>	Bethany Bauman beth	\$0.00	Need to Donate
<input type="checkbox"/>	Erin Blake erin	\$0.00	2009 Donors, Need to Donate
<input type="checkbox"/>	Erin Blake erin	\$0.00	APO, Need to Donate
<input type="checkbox"/>	Garv Bowser mar	\$0.00	Need to Donate
<input type="checkbox"/>	Sarah Bradley sbra	\$0.00	Need to Donate
<input type="checkbox"/>	Sarah Brown sara	\$0.00	APO, Need to Donate
<input type="checkbox"/>	Chris Browles chris	\$0.00	Need to Donate
<input type="checkbox"/>	Chris Bryant chris	\$0.00	Need to Donate
<input type="checkbox"/>	Christopher Bryant chris	\$0.00	Need to Donate
<input type="checkbox"/>	Ron Bryant ron	\$0.00	Need to Donate
<input type="checkbox"/>	Ronald Bryant Ron	\$0.00	2009 Donors, Need to Donate
<input type="checkbox"/>	John Butler jbut	\$0.00	Need to Donate
<input type="checkbox"/>	Crystal Canterbury cryst	\$0.00	APO, Need to Donate
<input type="checkbox"/>	Michael Choi mchoi	\$0.00	Need to Donate
<input type="checkbox"/>	Thode CJ arse	\$0.00	TEST, Need to Donate
<input type="checkbox"/>	Kimberly Coster kcoe	\$0.00	Need to Donate

« < 1-25 of 77 > »

Compose
Drafts
Sent
Contacts
Groups

[Upload Contacts](#)
[Import Contacts](#)

4. Use the "View by Group" option at the top to see those contacts that should be sent a "thank you" or "follow up" email as well as those that are members of any custom groups.

5. Click "Show more Groups" to see all the default groups and your custom groups. Click on the group to filter your contacts.

How to use Groups:

The Contact list can be difficult to handle, especially if you have years of contacts or a lot of contacts entered without email addresses. Setting up some groups in your Participant Center can make things much easier to work with when you get ready to send your emails.

If you have a large contact list with several old and defunct contacts, we recommend creating one large group that is your "Valid Emails" group. You can add all your good contacts to this group. Then, on your Contacts page, you can use the drop down filter to show only this group to then use this group to add Contacts to other smaller groups.

Once you've created a group, you just need to type the name of the Group on the composition page and it will add in all the members when you select the group name. This will prevent you from having to go through multiple pages each time you want to set up an email to go to a large audience.

This feature is exceptionally helpful in keeping track of how you ask different groups of your friends for donations. You can speak to your audiences in different ways by simply writing in different styles for your coworkers versus your family versus your friends, etc. People respond better to support requests when the message is personally relevant to their involvement with you. Make the most of this opportunity.

Managing Groups

Name	Number of members
<input type="checkbox"/> 2009 Donors	10
<input type="checkbox"/> APO	7
<input type="checkbox"/> Need to Donate	49

Hover over the group name for an "edit" option to rename the group.

You can also delete groups that you will not be using anymore.

Your Contacts tab will also provide you with several options to view your groups' members. This will apply to all the custom groups you create as well as the default groups.

Search **contacts** by name or email

Search

(Select [visible](#) or [none](#))

View by Group: [Donors](#) [Unthanked Donors](#) [Need follow-up](#) [Never Emailed](#) [Teammates](#) [Show more groups](#)

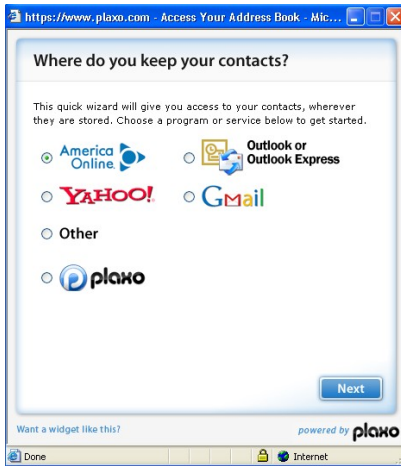
Name	Email	Amount	Groups
------	-------	--------	--------

Removing a Contact:

To remove a contact from a group, click on the contacts name to enter their profile. On the top will be a grey bar that summarizes their donation history for this event and on the right, lists the groups they've been added to. Click the trashcan beside the name of the group you wish to remove them from and they will no longer be pulled up when you use this group.

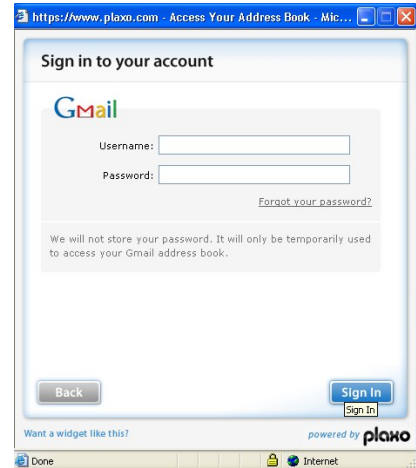
Importing Contacts

No one likes entering all of their contacts by hand! Use this feature to import your existing address books from other sources!



1. Click "Import contacts". This will open up this new window (left). Choose the source of your address book and click "Next".

2. For an online email account, you'll enter your username and password. You'll then be able to select which contacts from that account you want to copy into your Tour address book.



3. For an offline address book, select "Other" and click Next. You will need to export your address book to a CSV file first.

4. Click the "File Type" drop down and select what file type you are uploading.

5. Click the "detailed instructions" link to see exact step-by-step directions for each file type.

6. Click "Next" to upload your address book.

Upload Contacts: With the recent revision, you will now have a third contact upload option. The Upload Contacts button will allow you to create a generic CSV file with the headers of: "First", "Last", and "Email". This format is recommended if your offline contacts are stored in a format not available in the drop down mentioned above. Set up your excel file to look like the example below and save as a CSV file to use this feature.

	A	B	C	D
1	First	Last	Email	
2				
3				
4				

Sending Email

Click "Email" to begin messaging your contacts. The new email system is easier to use and far more versatile.

1. Type your contact's name in the "To" field and it will automatically pull up the matching contacts from your address book. You can also type in the name of any group or select your contacts from the "Contacts" page. Use the "Choose from your contacts list" button to switch over without losing any content.

2. Click "Use a Template" to select a default template or one that you've saved yourself.

"Save Draft" will allow you to save your progress and come back to this message later. "Save as Template" will let you save a finished email for reuse from the Template menu.

3. The email editor will let you format your email to be more than just text. You can use **Bold**, *Italics*, and Underlining to draw attention and add emphasis. You can also include lists, bullet points and different font colors.

Click "Drafts" to access any unsent messages that you have saved.

Click "Sent" to review any messages you've already sent.

Use the search field to locate messages more easily.

My Progress

The Progress page will show you how far you've come towards achieving your fundraising goal and show you a complete history of your online donations (as well as any offline donations you enter). You should come here to see who has donated to you so you can send them an email thanking them for their generous donation.

The screenshot shows the 'My Progress' page with a navigation bar at the top containing 'HOME', 'EMAIL', 'PROGRESS', 'PERSONAL PAGE', and 'TEAM PAGE'. The 'PROGRESS' tab is circled in red. Below the navigation bar is a 'View Personal Report' section. On the right side of this section is a button labeled 'Enter a new gift'. Below the button is a navigation bar with 'Personal' and 'Team' options. The 'Personal' option is highlighted in light blue. The main content area shows a progress summary with four metrics: 'I HAVE RAISED' (\$0.00), 'MY GOAL' (\$150.00), 'PERCENT' (0%), and 'DAYS LEFT' (270). Below this is a line graph titled 'Gift Amount' with a y-axis from \$0 to \$1 and an x-axis with dates 08-11-2009 and 08-25-2009. The graph shows a flat line at \$0. Below the graph is a 'Donation History' section with a toggle for 'Gift Notifications: On (turn off)'. Below this is a table with columns 'Donor', 'Amount', 'Notes', and 'Date'. Three callout boxes provide instructions: 1. Click 'Enter a new Gift' to enter offline donations. 2. Click 'Team' to see team progress and roster. 3. Review donation history. 4. Update fundraising goal by selecting 'Team' and clicking 'Change' by Goal.

1. Click "Enter a new Gift" to enter your offline donations. This will make sure that they are reflected on your fundraising thermometer.

Remember: Your offline donations will only show on your fundraising page if you enter them here!

2. Click "Team" to see your Team's current progress and your Team Roster.

3. Review your donation history to keep up with your donors.

4. Update your fundraising goal. (To update your Team goal, select Team on the right side navigation bar and then click "Change" by Goal).