



JDRF

Participant Centre Resource Guide



Thank you for registering to fundraise in support of JDRF! In this Resource Guide, you will learn how to maximize your fundraising efforts using your Participant Centre.

USER FRIENDLY DESIGN

The Participant Centre has been redesigned, making it easier for you to navigate and tap into the powerful tools that help make your fundraising campaign a success.

The screenshot displays the 'Dashboard' interface. On the left is a navigation menu with options: DASHBOARD, MY PAGE, TEAM, DONATIONS, FOLLOW UPS, SEND EMAILS, GET SOCIAL, FITNESS GOAL, and LIVE STREAMING. The main content area is titled 'Dashboard' and includes a 'SET UP YOUR CAMPAIGN' section with four cards: 'Personalize your page' (with an 'Edit Page' button), 'Create an email list' (with a green checkmark), 'Ask for donations' (with a 'Send email' button), and 'Raise awareness on social' (with a 'Share' button). To the right of these cards is a circular progress indicator showing '25% COMPLETED'. Below the campaign setup is a 'PERSONAL' section with a progress bar for 'Achieved \$0.00' and a 'Personal Goal \$500.00'. On the right side, there is a 'Get donations' section with an 'Email contacts' button and social media sharing icons. At the bottom right, a 'To do items' section lists 'Personalize your page' and 'Send your 1st 'sponsor me' email'.

DYNAMIC DASHBOARDS

The Dashboard is the home base for your fundraising campaign set up. It provides insight into your fundraising efforts and gives you a real-time snapshot of your achievements. As you start your fundraising campaign, try personalizing your page and sending emails to your contacts. These interactions are tracked in your Activity Feed that includes handy reminders so that you can take quick actions: A 100% completed profile, is proven to help you raise more for your campaign.

LET'S GET SOCIAL!

Share, share, share! The Get Social tab allows you to quickly share your progress with friends on Facebook, Twitter, LinkedIn, WhatsApp, and over 100+ other channels, and let them know the ways they can support your fundraising efforts.

ENHANCED EMAIL TOOLS

The easy-to-use email tools in your Participant Centre will help you become a fundraising expert! Send messages on-the-fly for donations, create contact lists and track responses when people open your emails, donate and more! Asking and thanking your donors has never been easier.

ENHANCED IN 2023

As your reach key fundraising and engagement milestones on your fundraising journey, when you're logged into the Participant Centre, you will be awarded badges that are showcased prominently on your fundraising page and added to your trophy case.



Returning Participant



Team Captain



Self Donation



Reached Personal Goal

NEW IN 2023

PAY FOR CASH-CHEQUE PLEDGES ONLINE

Share, share, share! The Get Social tab allows you to quickly share your progress with friends on Facebook, Twitter, LinkedIn, WhatsApp, and over 100+ other channels, and let them know the ways they can support your fundraising efforts.

Under Donations on the left-hand side of your Participant Centre Dashboard, select "Offline Donation" and follow the prompts to add any cash or cheques you've received. By entering all the personal information of the donor, once a payment is received, the donor will receive a tax receipt with the details that you've input via email.

For questions or support on Offline Donations, please reach out to a member of our Support Team at 1.877.505.5373 or via email at general@jdrf.ca.

INTRODUCTION: GETTING STARTED

Logging in to your Participant Centre portal is the start of your fundraising journey with JDRF. Here e you can personalize your campaign, spread the word, and solicit donations. This Guide will help you get the most out of your Participant Centre to maximize your fundraising efforts.

PERSONALIZING MY PAGE

Your page is your campaign's online presence and where visitors will donate. Personalizing your page helps showcase why fundraising for JDRF is important to you.

To start personalizing, go to My Page and click the Edit Page button or simply hover over the preview of your page and click to edit. JDRF has pre-loaded some default content for you to draw inspiration from.

EDIT YOUR TITLE

- In the Title field, enter a brief title to introduce your page.

EDIT PERSONAL PAGE



Page setup

Page title

Fundraising Page of Joe Smith

Fundraising goal

500.00

Personalized URL

joesmith

UPDATE YOUR FUNDRAISING GOAL

- If you decide to change your goal after you register, enter the new amount in the Fundraising Goal field.
- Click Save at the bottom of the page and the fundraising goal and percentage raised will re-calculate in real-time.

WHAT'S YOUR PERSONAL URL?

- A link is automatically generated by the system for your page. You can use this link to direct people to your page to donate on social media or through email donation requests.
- Customizing the name of the URL makes it more personal and shareable.
- Copy and paste the personalized URL to share to your fundraising page anywhere.

PHOTOS AND STORY

Sharing your T1D story shows your personal connection and why you're raising funds. This can make a tremendous impact on your fundraising. Here are some steps that you can take to share your personal story:

ADD PHOTOS TO YOUR PAGE

- Under Images, click Add Media.
- Click to upload an image and choose a photo from your device.
Note: For best quality, choose a photo that is at least 320 pixels (h) by 260 pixels (w).
- Zoom or rotate your image for best fit.
- Click Save.



ADD VIDEO TO YOUR PAGE

- Under Images, click Add Media.
- Change Media type to Video.
- Copy the link of a YouTube video and paste into YouTube link box.
- A preview of your YouTube video will appear in the frame above.
- Click Save.

EDIT OR RE-ORDER YOUR MEDIA

- The first image will be your main image when visitors reach your page.
- To re-order images, click a thumbnail and drag/drop it into place.
- Delete photos by hovering over a thumbnail and clicking the X icon in the top right.
- Click Save in the bottom right-hand corner.

ADD A STORY OF YOUR OWN

- Share your story about why you are fundraising into the My Story panel or copy and paste text from another document. Note: Formatting from other documents will be removed.
- Use the tools to edit and format your story as you would on a computer using text styles, lists, titles, links and embedded images.
- If you make a mistake, highlight the text, and click the eraser icon to delete the changes.
- Click Save.

TEAM PAGE

If you are a team captain, you can also personalize your team's page. Like your personal page, the team page is an opportunity to tell visitors about your team, share why you're fundraising, add images and videos, a team story, a team URL, and your overall fundraising goal. Click the Edit Page button or simply hover over the preview of your page to get started.

EDIT THE TEAM TITLE

- In the Title field, enter a brief title to introduce your page.

Page setup

Team name Team Citadel	Fundraising goal 1,000.00
Page title Team Citadel's Page	
Personalized URL TeamCitadel	

UPDATE TEAM FUNDRAISING GOAL

- If you decide to change your team's overall goal, enter the new amount in the Fundraising Goal field.
- Click Save at the bottom of the page and the fundraising goal and percentage raised will re-calculate in real-time.

WHAT'S YOUR TEAM URL?

- A link is automatically generated by the system for your team page. You can use this link to direct people to your page to donate by sharing on social media or via email.
- Customizing the name of the URL makes it more personal and shareable.
- Copy and paste the personalized URL to share anywhere.

ADD PHOTOS TO YOUR TEAM PAGE

- Under Images, click Add Media.
- Click to upload an image and choose a photo from your device.
Note: For best quality, choose a photo that is at least 320 pixels (h) by 260 pixels (w).
- Zoom or rotate your image for best fit.
- Click Save.



ADD VIDEO TO YOUR TEAM PAGE

- Under Images, click Add Media.
- Change Media type to Video.
- Copy the link of a YouTube video and paste into YouTube link box.
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EDIT OR RE-ORDER MEDIA

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- To re-order images, click a thumbnail and drag/drop it into place.
- Delete photos by hovering over a thumbnail and clicking the X icon in the top right.
- Click Save in the bottom right-hand corner.

ADD A STORY ABOUT THE TEAM

- Enter a summary about why your group is fundraising for JDRF into the team story panel or copy and paste text from another document. Note: Formatting from other documents will be removed.
- Use the tools to edit and format your page as you would on a computer using text styles, lists, titles, links, and embedded images.
- If you make a mistake, highlight the text, and click the eraser icon to delete the changes.
- Click Save.

DONATION HISTORY

Your Donation History summarizes gifts received to date. You can see who has donated and track who you've personally thanked to ensure donors feel appreciated. Team captains also can view and thank donors to who have given directly to the team.

HOW DO I THANK DONORS?

1. From your donation list, click the checkbox next to each donor you wish to thank. You may select one or many donors to thank in a single email. If you can't find a donor, use the "Search" box to type their name directly or click the Name, Amount or Date column headers to re-sort your list.
2. The number of donors you've selected will automatically load in the toolbar above where the envelope icons appear. Choose the option to Email selected.
3. The contacts you chose will show as recipients to send a personal thank you email. We recommend using the Thank You template pre-populated in the Participant Centre.

WHAT ABOUT DONORS YOU'VE ALREADY THANKED?

After you've thanked a donor by email, the toggle in the "thanked" column will automatically change to "Yes". The toggle can be adjusted manually by for each of your donors as necessary. If you've thanked a donor outside of your Participant Centre (say by text or via your personal email), you can manually switch them by changing them to "Yes". Doing so will automatically consider these donor as having been thanked.

HOW WILL I KNOW IF A DONOR LEFT ME A PERSONAL MESSAGE?

If one of your donors has included a personal message to you when they donated a Message link will appear in the row for that individual. Click to view their message.

FOLLOW UPS

In the Follow-Up section, track the effectiveness of your emails by seeing who opened or viewed your email, or donated to you. This visibility allows you to tailor your messages for new contacts, those who you are sending a reminder or those you need to thank. Actions, Filters and Status flags help to keep you up-to-date and identify appropriate next steps.

WHAT ARE QUICK ACTIONS?

Our research has identified three key segments to improve your fundraising:

1. Donors you haven't thanked yet
2. Contacts you've emailed but haven't donated
3. New contacts who haven't received an email yet

To make things easier for you, we've created handy Quick Actions that will show you how many contacts you have in each category, and dynamically filter them so that you can start an email to those contacts.

HOW DO I FILTER MY EMAIL ACTIVITY?

Filters are an efficient way to view how contacts are responding to your campaign. Filter contacts by selecting the type of contacts that you want to see in the filter through the pull-down menu. The system will automatically find contacts who fall into this category. There are various filter types to support your campaign:

- All Contacts: All your contacts
- Not Emailed: New contacts who you have not yet emailed
- Not Donated (emailed): Contacts who you have emailed, but have not yet donated
- Not Thanked: Donors who you have not yet thanked
- Thanked: Thanked donors
- Sent Email: Contacts who you have emailed, but have not opened the email or donated
- Opened Email: Contacts who have opened one of your emails
- Viewed Page: Contacts who you have emailed and viewed your page, but not donated
- All Donors: All of your donors – thanked and not thanked

HOW DO I SEND A FOLLOW UP WITH FILTERED CONTACTS?

1. Click Filter by pull-down and choose the Type you'd like to see.
2. Click email all in filter.
3. You will be re-directed to the email section. All the contacts you filtered for will appear as Recipients. You may add or remove contacts from the Recipients bar before sending your email.
4. Choose a template and/or compose your email.
5. Send.

WHY ARE THERE CONTACTS I HAVEN'T ADDED?

Donors who have contributed to your fundraising campaign and were not originally among your contacts are automatically added to the My Contacts and Follow-ups sections so that all donor information is kept together. If you're part of a team, team members are also included as they join to make it easier to communicate to your team.

SEND EMAILS

Research shows that fundraisers who use their email to ask for donations, raise more money! Send messages to potential donors, sponsors, and your teammates and make them aware your fundraising campaign. Several sample emails are available to use throughout each step of your campaign. You can edit these templates, or you can create your own email message using a blank email template. Track and monitor responses in Follow-Up section to keep on top of how your campaign is doing.

CREATE AND SEND AN EMAIL MESSAGE (FROM THE EMAIL CENTRE):

1. Select a sample template email from the pull-down menu.
2. Enter or select the contacts who you would like to email.

Contacts can be added in a few ways:

- If the contact has already been added to your contact list from past campaigns, type their name or email address and the system will automatically recognize them.
- If the contact does not already exist in your contact list, you can type in their email address to send an email on the fly.
- Click the “+” icon to open your Contact List and start populating your Address Book.

3. In the subject field, type the subject line that you would like to appear in your email or use the template subject.
 - In the body field type your message. If you selected an email template, the default message will appear in the body of the message. Use the tools at the top of the edit window to edit and format your message.
 - Note: Your message will automatically contain “merge fields” which will dynamically populate with contact or fundraising information when sent. You can identify these as text wrapped with [% and %].
4. Click to preview how your email will look to the recipient.
5. Click “send email now” to send the email to the contacts you selected. You will receive a confirmation message on the next page if your email was sent successfully or further instructions if something needs to be adjusted before re-sending.

SAVE A CUSTOM TEMPLATE FOR FUTURE USE:

1. If you are creating a custom email, click the “save email message” button at the bottom of the page.
2. A “save as” field will appear near the bottom of the page. Name the file.
3. Click “save email message.”
4. The message will appear in your “templates” under a “saved templates” section with the name you have given it. Saved templates can be accessed for future emails and/or edited at any time. When editing a custom template, be sure to click save to ensure your changes are saved for next time.

CONTACTS

The “Contacts” section allows you to build an address book of potential donors by adding or import contacts from other email programs and edit contact information. Donors who have sponsored you and were not originally in your address book will be automatically added to your Address Book. Don't worry, your contacts are private to you only.

HOW TO GET CONTACTS INTO YOUR ADDRESS BOOK?

There are two ways to add contacts to your address book:

- Import: Get contacts directly from another email or social platform (recommended)
- Add a contact: type in their first name, last name and email address

IMPORTING CONTACTS

Your Participant Centre uses a technology called Cloudsponge to import contacts directly from your email and/or social accounts.

1. Click the Import contacts button at the top of your “my contacts” page
2. Select the program or service that you use to keep your contacts.
3. Login to your account.
4. Select the contacts that you want to add.
5. Select Next.
6. Select Done.

MANUALLY ADD A CONTACT:

If you prefer to manually contacts, choose “Add Contact”, and fill in details for each contact using the form provided. First name, last name and email are required.

SEND EMAIL TO CONTACTS IN MY ADDRESS BOOK?

To send an email to all your contacts, click “email all contacts” to send an email to everyone in your address book. Or, to email a subset of contacts:

1. Click the checkbox beside the contact’s name. Repeat until you have selected all the contacts you wish to message.
2. If you make a mistake, choose “clear” to start again or uncheck the erroneous contact.
3. Click “email filter contacts” (you will be re-directed to the “send email” page).
4. Select a template.
5. Modify the message.
6. Click “send email now” or “save email” for future use.

HOW DO I EDIT A CONTACT?

1. Search for the contact to edit by name or email.
2. Choose the pencil icon in the corresponding action column for that contact.
3. To edit, simply fill in the new information in the “edit contact” form and click save.

HOW DO I DELETE A CONTACT?

If you wish to remove a contact, click the trash icon next to their name. Should you wish to delete more than one contact at once, click the checkbox next to each contact’s name you wish to delete. Click the “delete” option that appears in the grey toolbar above displaying the number of contacts you’ve selected to delete.

GET SOCIAL

One of the best ways to spread the word about your fundraising campaign is to tell your friends on social media! Create a post that tells people about why you're fundraising for JDRF and links back to your fundraising page to make it easier for people to donate.

HOW DO I CREATE A SOCIAL POST?

There are currently three main social networks from which you can create a post: Facebook, Twitter, and LinkedIn in your Participant Centre.

1. Click the button for the social media platform you would like to share from.
2. Login to your social media account.
3. In the next pop-up that appears, write your post in the text box provided. Your page link is automatically included in the post. Tip: Try to be concise! Some networks like Twitter limit the number of characters.
4. Click the "post to" button at the bottom of your post.

HOW DO I GET MY PHOTO TO APPEAR?

The main photo on your Page should appear when you share to Facebook or LinkedIn (Note: Twitter doesn't automatically support the ability for images from your page). Sometimes these networks can be slow to populate your page with new information if you've recently changed it.