

Fundraising How To Guide

● How to Create Your Own Fundraiser

- From the home page of the [Autism Edmonton Website](#), click 'Fundraising' in the navbar.
- **NOTE:** All links on the website that redirect you to the Membership Portal will first open a popup, asking you if you know your Membership Portal login credentials.
 - Click 'Yes' if you know your login credentials, and you will be redirected to the Membership Portal.
 - Click 'No' if you do not know/have your login credentials, and you will be redirected to the Member Registration page, where you can register to become a member.
 - **Once you have registered as an Autism Edmonton Member, return to the Fundraiser tab and follow the steps above.**
- You create a fundraiser from the website a couple different ways:
 - **Clicking the 'Start Your Campaign'.**
 - **Clicking any of the 'Get Started' buttons.**
 - This will allow you to create a fundraiser in the same category as the fundraiser that you selected
 - **Clicking the 'Create a Donation Page'**
- After doing one of the actions above, you will be redirected to the Membership Portal Fundraiser Subtab.
- **Go to the 'Creating or Joining a Fundraiser in the Membership Portal' section at the bottom of this How-to Guide.**

● How to Join a Fundraiser

- From the home page of the [Autism Edmonton Website](#), click 'Fundraising' in the navbar.
- **NOTE:** All links on the website that redirect you to the Membership Portal will first open a popup, asking you if you know your Membership Portal login credentials.
 - Click 'Yes' if you know your login credentials, and you will be redirected to the Membership Portal.
 - Click 'No' if you do not know/have your login credentials, and you will be redirected to the Member Registration page, where you can register to become a member.

- In the left-hand menu, there are 4 fundraising templates.
 - You can drag and drop one of these templates into the box labeled 'Form Fields'.
 - You can view the template by clicking the eyeball icon next to the template's name.
 - Once you have chosen a template, drag and drop it into the 'Form Fields' section.
 - This will make the template appear on the screen.
 - **Once the template is visible on the screen, you can edit the template sections by clicking on different sections of the form.**
 - **Click the placeholder profile picture. A slider will open.**
 - Under the 'Documents' label, you will notice text that reads 'placeholderperson.png'.
 - To replace this image, click the red 'X' next to the text, and click the Choose file button below. This will allow you to upload a file saved on your device.
 - Once you have chosen a new image, scroll to the bottom of the page and click 'Finish'.
 - **Click the Social Media Icons section. A slider will open.**
 - Add your social media handles to any of the social media fields here.
 - Scroll to the bottom of the page and click 'Finish'.
 - **Click the 'My Team Members' section. A slider will open.**
 - In the field labelled 'Content', you can add/remove team members.
 - Scroll to the bottom and click 'Finish'.
 - **Click the 'John Doe' section. A slider will open.**
 - In the 'Field Label' field, you can edit this heading.
 - Scroll to the bottom and click 'Finish'.
 - **Click the Lorem Ipsum content. A slider will open.**
 - In the field labelled 'Content', you can remove and edit this text.
 - Scroll down to the bottom and click 'Finish'.
 - When you are happy with how your webpage looks, click the 'Submit' button at the bottom of the page.
 - **This will redirect you to the Status Page**
 - **Status Page**
 - This page will confirm your fundraiser submission
 - This page will notify you that your fundraiser has been successfully created and is awaiting approval by Autism Edmonton
 - **Once your fundraiser has been approved, you will be granted access to the Mailouts Page**
 - **Mailouts Page**

- **In the Mailouts tab, you can create/add email groups.**
 - These are lists of individuals that you can email in bulk, notifying them of your fundraiser.
 - Click the 'Import new Group' button in the header.
 - Give the email group a name in the 'Email Group Label' field.
 - To import an email group, you must create a **CSV** of the individuals that you would like to email.
 - **THE CSV MUST CONTAIN ONLY THREE COLUMNS**
 - **THE FIRST ROW OF THESE THREE COLUMNS SHOULD BE LABELLED AS FOLLOWS:**
 - **First Name**
 - **Last Name**
 - **Email Address**
 - **NO FIELDS CAN BE EMPTY IN THIS CSV.**
 - Click the Choose File button and import your created CSV.
 - Click the 'Submit' button.
 - You can Email individual groups by clicking the 'Email' icon in the 'Function' column of a specific email group.
 - You can view the individuals within an email group by clicking the Eyeball icon in the 'Function' column of a specific email group.
 - You can Delete an email group by clicking the Trashcan icon in the 'function' column of a specific email group.
 - You can send an email to all email groups by clicking the 'Send to All Groups' button.
- **How to Donate to a Fundraiser**
 - From the home page of the [Autism Edmonton Website](#), click 'Fundraising' in the navbar.
 - In the 'Ways to Fundraise' section, click 'Find a Fundraiser' under any of the categories.
 - This will redirect you to a page that displays all active fundraisers within the selected category.
 - On one of the Fundraisers on this page, click 'View This Fundraiser'
 - This will redirect you to the selected fundraisers main page.
 - Click the 'Donate' button on the page.
 - This will redirect you to the Donation page.
 - Input your First Name, Last Name, Email, and donation amount into the required fields.
 - If you would like to receive a Tax Receipt, select 'Yes' in the 'Tax Receipt' field.
 - **If you would like a Tax Receipt, you are required to donate a minimum of \$20.00, as well as include your address information**

- If you would like to have your donation displayed on the fundraiser's webpage, select 'Yes' in the 'Would you like to make your donation public' field
 - **Selecting Yes in this field will display your first name, as well as how much you donated on the fundraisers main page.**
- After these fields have been populated, click 'Next'.
 - This will redirect you to a page where you can confirm your information is correct.
- If your information looks correct on this page, click the 'Donate' button at the bottom.
 - This will prompt you to add your PayPal credentials and make the transaction.
- Once your transaction has been approved, click the 'Return to Merchant' button.
 - This will redirect you to a Thank You page.
- A "Thank You" email will be sent immediately to the inputted email along with a PDF of your individual details, and payment details.
 - Once the transaction has been approved and confirmed, another email will be sent to the inputted email.
 - **Tax Receipt will be attached to this email if you choose to receive one.**