Personal Fundraising Page User Guide
ehspetsinthepark.com

Understanding Your Personal Page Tool Bar

The toolbar for your personal page includes a variety of options:

Click *Dashboard* to return to the main area of your personal page, or your "participant centre."

Click *Message Centre* to manage your email contacts (this includes adding new contacts, sending requests for support, and sending thank you emails).

Click *Page Manager* to upload an image and add your personal story.

Click *Personal Profile* to change your personal information or password.

Click *Team Settings* to join or create a team.

Click *Donation Monitor* to view your donations and add offline donations.

Click *Help* to email EHS for assistance.

Understanding the Message Centre

Use the *Message Centre* to manage your email contacts.

Here, you can:

1) Add an individual contact. You can add individual contacts to be stored in your Message Center at anytime. Simply click “Add an Individual Contact” and enter first name, last name, and email address.

2) Import your contact list. To upload a contact list, click “Import your contact list” and simply upload a .csv file from your Outlook or other email server using first name, last name and email. Please note that .csv files must not contain spaces or special characters within the fields.

Click below for instructions on uploading contact lists from:

Gmail
Hotmail
Yahoo
Outlook

3) Send a pledge email requesting donations. To send a pledge email, select the participant(s) to mail by clicking the “Select” box. Next, click “Send Pledge Email.” You’ll be able to personalize your message, which will contain a link to your page.

4) Send a follow up pledge email to contacts who have already received a pledge email. To send a follow up email, select the participant(s) to mail by clicking the “Select” box. Next, click “Send Follow-up Email.” You’ll also have the ability to customize your message. Ensure that your list does not contain spaces or characters other than letters.

5) Send a thank you email to your donors. To send a thank you message, select the participant(s) to mail by clicking the "Select" box. Next, click "Send Thank You Email." Again, you will have the opportunity to customize your message.

Understanding Page Manager

Use *Page Manager* to upload your photo and personal story.

Uploading your photo: Your page will automatically be populated with a default image. To add your own photo, click Edit Image above the default image. Next, click Upload Image. In the Edit Images text box, click Browse and select the image you'd like to use from one you've already saved on your computer.

Please note that the image cannot exceed 320 pixels in width. When you have selected your image, click Save.

Uploading your personal story: Your page will automatically be populated with a default story. To add your personal story, click Edit Personal Story. Next, edit the text in the Edit Personal Story text box.

Click Save when your changes are complete.

Understanding Personal Profile

Use *Personal Profile* to change your personal information or password. This includes mailing address, email address, and phone number.

Understanding Team Settings

Use *Team Settings* to join a team, create a team or manage your team.

Click Join A Team to join a team. Next, select the team you'd like to join.

Click Create A Team to create a team. Next, enter your team name.

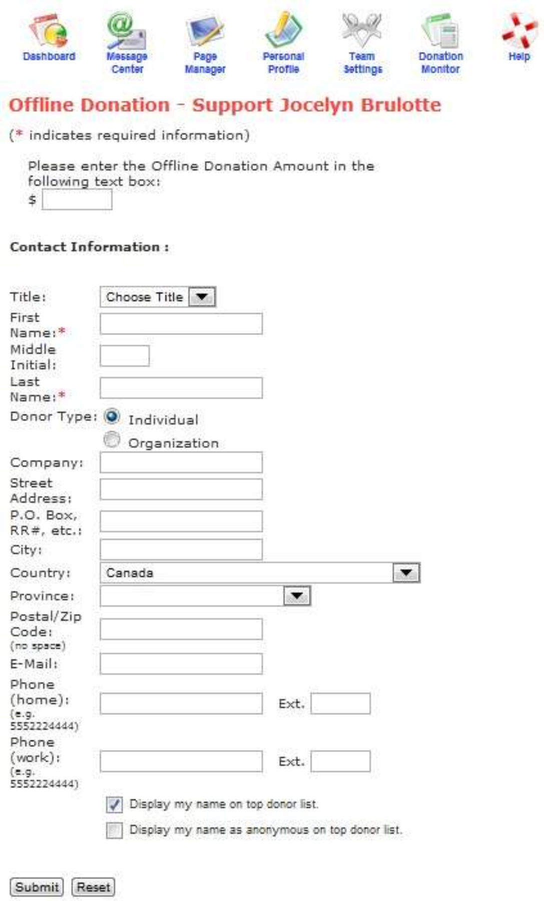
After you have created your team, you can email you team members by clicking on Email Team.

You can also edit your team name, view requests to join your team, view team recruitment history, or resign from your team.

Understanding Donation Monitor

Use *Donation Monitor* to view your donations and enter any donations received offline.

To enter offline donations, click Enter Online Donations and complete the offline donation form:



*Please note – be sure to get permission from your donors to click "Display my name on top donor list."

To collect donations offline, please use the donation forms provided here:

http://www.edmontonhumanesociety.com/images/facebook/pledgeform2012.pdf

Understanding Help

For assistance, please contact:

plannedgiving@edmontonhumanesociety.com

Phone: 780-491-3880

Fax: 780-479-8946