

# **ONLINE FUNDRAISING PAGE HANDBOOK**

A guide to using UHN Foundation's fundraising website and managing your fundraising page

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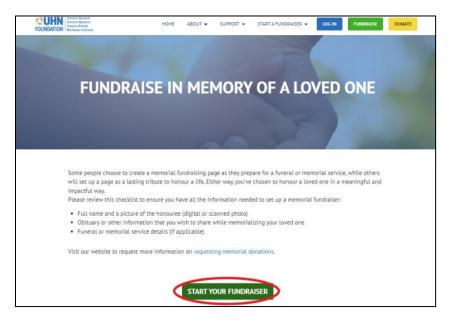
## **Creating a Fundraising Page**

## Getting started: choose a fundraiser

We offer 4 types of fundraisers:



• Click on the Get Started button for the type of fundraiser you would like to create. You will be taken to a landing page with more information about the type you've selected.



• Click on "Start your fundraiser" to be taken to the registration form

#### Step 1: Create a fundraising page

reate a page	
Your Fundraising Page Type	* Indicates Required
In Memoriam Create a fundraising page in memory of a loved one.	
Fundraising Goal:	
Personal donation amount:	
Yes, make this an anonymous gift.	
Yes, you can display the amount of my donation publicly.	

- Enter your fundraising goal
- You may choose to make a personal donation at this time. If you do so, it will be visible on your fundraising page, unless you check the "Yes, you can make this an anonymous gift" box.
- Click "Next Step"

## **Step 2: Provide details**

	* Indicates Required
Returning user	
* User Name:	
* Password:	
Log In	
Email me my login	
information	
	* User Name: Password: Log In

- If you've previously created a fundraising page on our site, or made an online donation since November 2018, select "Returning user"
  - You can use the "Email me my login information" link, if you forget your password
- If you're brand new to our site, click "Register as new user"

## Step 2: Provide details con't.

Protein     Registration     Protein Information     *Tise        *Tise        *Tise        *Tise        *Tise        *Tise        *Tise        *Tise           *Tise           *Tise              *Tise                       *Tise <th>Memorial Page</th> <th></th> <th>Participant Center Access Information</th>	Memorial Page		Participant Center Access Information
Indicates Required     Personal Information     Press     Press <td>U U Detain</td> <td></td> <td>User Name:</td>	U U Detain		User Name:
Personal Information	Registration		S to 62 characters
Personal Information  Title  Title  First  First  Contact Information  First  First  Contact Information  First  First First  First  First First First  First	Please complete the resistration form below	Indicates Required	
* Title   * Title   * First   * First   * Genet my functioning for:   * G			
	Personal Information		Repeat Password:
	* Title		
I set   • Lest   • Lest   • Contact Information   • Stret 1:   • Email:   • Stret 2:   • Pone Number:   • Pone Number:   • Pone Number:   • Pone Number:   • Nord:   • Word is your relationship to the honourse?   VMVER Unit is used to a solerisopa et to be sensitive adjustments of the down and start consection: adjustments down and start down a			Additional Information
• Lest • Market is your relationable of a line memory of: • What is your relationable of a line memory of item whether a line of lin	* First		
Contact Information  Steret 1:  Contact Information  Steret 2:  Proor Number: Proor Number: Contact Information  Control:  Contact Information  Control:  Contact Information  Control:  Control:  Control:  Control:  Control:  Control: Contro: Contro: Control: Control: Control: Control: Contro: Contro: Contro			Highest priority needs
Contact Information         *Breet 1:       *Email:         Street 2:       Prome Number:         Street 7:       Prome Number:         *Onty Town:       If would like to be emailed when a gift is made on my behalf.         *Onty Town:       If would like to be emailed when a gift is made on my behalf.         *Prome Number:       Prome Number:         *Prome Number:       Prome Number:         *Prome Number:       If would like to be emailed when a gift is made on my behalf.         *Prome / State:       ************************************	* Last		* My page is in memory of:
Contact Information         • Sneet 1:       • final:         • Sneet 1:       • final:         • Sneet 1:       • final:         • Provide 1:       • final: <td></td> <td></td> <td></td>			
Street 1:  Street 2:  Prone Number: Prone N			What is your relationship to the honouree?
Contry:     C	Contact Information		
Strett Z     Proce Number:     Image: Strett Z     Proce Number:	* Street 1: * Email	8	WAIVER
Stret Z.     Proce Number:     O bo seletifycou, P floader mask est, ed forgat metrus conpared. Cas sagetts dam sem. See making a planetar dola ca coletizou, Present utilicia mask, est, ed forgat metrus conpared. Cas sagetts dam sem. See making a planetar dola ca coletizou, Present utilicia mask, est, ed forgat metrus conpared. Cas sagetts dam sem. See making a planetar dola ca coletizou, Present utilicia mask, est, ed forgat metrus conpared. Cas sagetts dam sem. See making a planetar dola ca coletizou, Present utilicia mask, est, ed forgat metrus conpared. Cas sagetts dam sem. See making a planetar dola ca coletizou, Present utilicia mask, est, and en matrus in planetar. Solution metrum vet local saget contract, est, value and ender metrus or planetar dola cal contract, est, value and ender mask est, esplored and see main striticia, est, hubitase planetar dola coletizou. Planetar dola cas coleti			
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Coy Torin:  Province / Bate: Province /			
Province / State: <ul> <li>Province / State:</li> <li>Province:</li> <li>Province:</li></ul>			Cras eleifend nibh sed metus tristique, et fermentum libero eleifend.
Province / Date:  Province / Date: P			
Western Nogola / Superior Consequent fields and the spet Interdum vehicula. Bed facilities lacus risk, lid bebords er accumana guis. Sed ac corganise and sens. Sed motils facilities vestimation. Holds all amet est nec odio ultricise vestibulum lid non maaris.			tempus leo scelerisque sed. Phasellus eu tellus tempus, luctus ipsum vel, hendrerit augue. Donec diam diam,
Postal / ZIP Code:   Id non maunis.  Country:  I agree to the terms and conditions lated above	• Western	iospital Foundation.	Quisque consequat felis eget interdum vehicula. Sed facilisis lacus nisi, id lobortis ex accumsan quis. Sed ac
Country:	* Postal / ZIP Code:		
Country:			•
Canada -	* Country:		I agree to the terms and conditions listed above
	Canada -		

- Complete the registration form; required fields are noted with an \*asterisk
- Review and check the box to agree to the Waiver
- Click "Next step"

#### 3. Review

lemorial Pag		
Create a page Provide Details	3 Review Amake Payment	
Summary		
You have completed 1 registra	tion.	
Ms.		
Tara Irwin-Test		
Irwin-Test		
	Participation Type: In Memoriam	\$0.00
	My gift:	\$100.00
		Participant Total: \$100.00
Total		\$100.00
L		
Cancel		Complete Registration
		- Somplete Registration

- Review the Summary
  - If you are making an additional gift, you will be taken to the payment page
  - If you are not making an additional gift, you will be taken to the "Submit Payment" page
- Click "Complete Registration"

## 4. You're done!

nk you for registering for Memoi infirmation email has been sent t fundraising today with your Pa	to I@gmail.com.	
t fundraising today with your Pa		
	rticipant Centre!	
Access your Participant Centre		
egistration Sum	many	
gistration Sum	ina y	
As. Tara		
@gmail.com	Participation Type: In Memoriam	\$0.00
oronto, ON	My gift:	\$0.00
		Participant Total: \$0.0
No. 19	In Memoriam	

• To customize your fundraising page and begin fundraising, click "Access your Participant Centre". Or you can come back to the site any time to make updates or fundraise.

## **Using your Participant Centre**

## Logging in

Login
* = Required Fields
*User Name: Username
"Password: Password
remember me
LDG IN
Forgot your login or password?
Enter your email to get your login username and password details.
* = Required Fields
*Email (you registered with): Email Address
SUBMIT

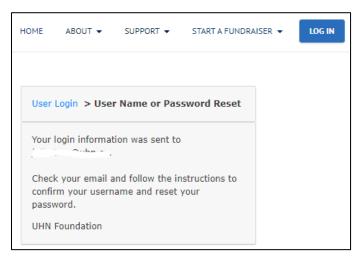
• Visit the Fundraising website (<u>uhnfoundation.ca/fundraise</u>) and click "Log In"

## Reset your password

FOUNDATION Torsetio General Torsetio Westeen Torsetio Rehab Micherer Institute	HOME ABOUT ▼ SUPPORT ▼ START A FUNDRAISER ▼ LOG IN FUNDRAISE DONATE
	Login  • = Required Flutts •User Name: Username •Password: Password c remember me LDCE IN
	Forgot your login or password? Enter your email to get your login username and password details. * <i>Required Finds</i> *Email (you registered with): Email Address

- If you forgot your password, the system can send you a link to reset it
- Visit the Fundraising website (<u>uhnfoundation.ca/fundraise</u>) and click "Log In"
- Enter your email address and click "Submit"

## Reset your password cont....



• The system will send you an email to confirm your username and reset your password

CUHNN Transitio General Topositio Problem FOUNDATION Michaerer Institute
Dear Julie, At your request, we have sent your user name. If you did not request your user
name or did not attempt to register again, please reply to this email. User Name : <u>i@uhn.ca</u> Password : <u>Set or reset my password now</u> Log in here
If there are multiple user names listed above, you have registered on our site more than one time with the same email address or are sharing this email address with others.
Sincerely,
UHN Foundation
CUHN Inserts Statis FOUNDATION Michael Inserts
UHNFOUNDATION.CA OUR PROGRAMS WHO WE ARE EVENTS

• Click the "Set or reset my password now" link

	(	
* User Name:	tara.irwin.work@gmail.co	
* New Password:		
* Retype Password:		
Password Hint:		

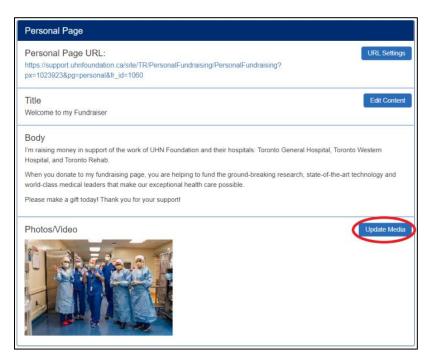
- Complete the form with your new password and click "Submit"
- The form will redirect you to uhnfoundation.ca, but simply go back to the Fundraising website (<u>uhnfoundation.ca/fundraise</u>) and click "Log In" to access your Participant Centre.

## Participant Centre home page

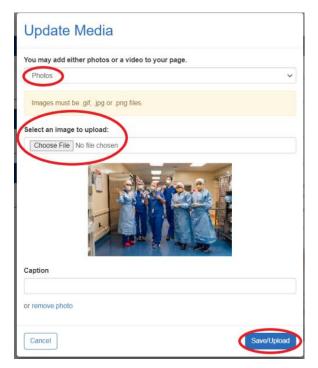
• From the Participant Centre home page, you can access all available tools to customize your fundraising page, send emails and manage donations

CUHN FOUNDATION North Rehab Michener Institute	
Home Email H Jule, velcome to your Fundraising Participant Centrel	
This is the hub for everything you'll need to be a successful fundraiser! Explore the full suite of powerful fundraising tools to he	Ip you raise money and reach your goal. Everything to get you started, keep you going, and monitor your progress lives here.
We are here to support you and your fundraiser! If you have any questions or need support, please contact julie.tran@uhn.ca.	
What to do next?	Recent Activity
Set up your Personal Page           Customize your Personal Page with a story about why you are raising funds for this cause.	You joined Personal Fundraiser
Add Contacts to Your Address Book     Add contacts to email from your personal Address Book on our site.	Contacts Al Contacts
Add contacts to email from your personal Address Book on our site.	
Send an Email  You have sent no emails to your family or friends. Add them to your Address Book and email them about your fundraising effort.	No contacts to display.
Thank your Bonors     Thank your Bonors!	
Set a God     You have reached 0% of your goal. Can you set a higher goal?	
-	
Your Fundraising Progress	Personal Page
	Personal Page URL: URL Skittings https://support.uhnfoundation.ce/site/TR/PersonalFundraising/PersonalFundraising?
\$0.00 \$500.00	px=1023923&pg=personal&fr_id=1060
Badges	Title Edit Content Welcome to my Fundraiser
Badges are fun things you can earn.	Body
	I'm raising money in support of the work of UHN Foundation and their hospitals: Teronto General Hospital, Teronto Western
Personal Donations	Hospital, and Toronto Rehab.
No donations found.	When you donate to my fundraising page, you are helping to fund the ground-breaking research, state-of-the-art technology and world-class medical leaders that make our exceptional health care possible.
	Please make a gift today! Thank you for your support!
	Photos/Video Update Media

#### Change your photo or upload a video

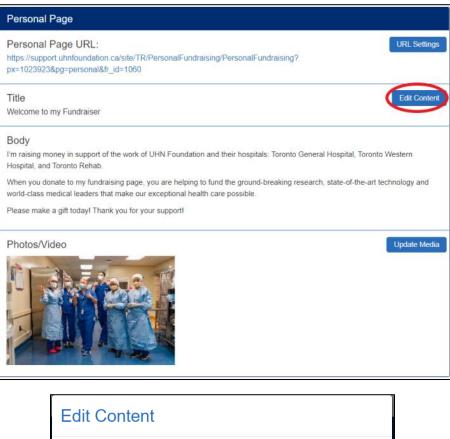


• Under the Personal Page section, click on the Update Media tab



- Click Photos or Video option from the drop down menu
- To find an image file saved on your computer, click "Choose File"
- Use the Caption field to include a caption below your photo
- Click "Save/Upload"

### Personalize your story



Welco	me to	) my F	undrai	iser									
Ρ	В	Ι	U	≣		E	÷	Ħ	≡	ĬĬĬ	Û	Ċ	C
Gene Wher resea	ral Ho n you c irch, st	ospital donate tate-o	l, Toroni e to my	to Wes fundra rt techn	aising p nology a	ospital, bage, yo	, and To ou are	oronto l helping	Rehab g to fun	nd the g	hospital ground- hat mal	-breakir	
			ift toda			for you	r suppo	ort!					
												-	

- Under the Personal Page section, click on the Edit Content tab
- Update Title: this is the title of your Fundraising Page
- Update Body: similar to using Microsoft Word, you can update the copy that is displayed on your fundraising page.
- Click "Save"

## **View Personal Page**

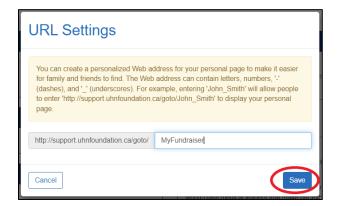
Personal Page Personal Page URL: Intro //support uniform/undraser Tible URL Settings Little Content Cott Content	Direction of the second s	TOTAL RAISED 50 0% Gaul: \$500.00 DOMATE
Body I'm raising money in support of the work of UHN Foundation and their hospitals. Toronto General Hospital, Toronto Western Hospital, and Toronto Rahab. When you donate to my fundnaising page, you are helping to fund the ground-breaking research, state-of-the-art technology and world-class medical leaders that make our exceptional health care possible. Please make a gift today! Thank you for your support! Photos/Video Upside Moda	Original Strategy of the second of the Apacheous and their hopesas. Theread Service Amagine, Theorem Service Amagine, Theorem Service Amagine, Theorem Service Amagine, Theorem Service Amagine A	Deners
	FUNDRAISING ACHEVEMENTS	View all denors for Individual Page

• On the Personal Page Section, click on the link under "Personal Page URL" and your page will open in a new tab in your web browser

## **Create a custom URL**

Personal Page	
Personal Page URL: https://support.uhnfoundation.ca/site/TR/PersonalFundraising/PersonalFundraising? px=1023923&pg-personal&Ir_id=1060	IRL Settings
Title Welcome to my Fundraiser	Edit Content
Body I'm raising money in support of the work of UHN Foundation and their hospitals. Toronto General Hospital, Toronto West Hospital, and Toronto Rehab.	
When you donate to my fundraising page, you are helping to fund the ground-breaking research, state-of-the-art techno world-class medical leaders that make our exceptional health care possible. Please make a gift today! Thank you for your support!	logy and
Photos/Video	pdate Media

• From the Personal Page section, click "URL settings"



- Type the desired URL in the space provided
- Click "Save"

## Change your fundraising goal

Me	
Your Fundraising Progress	Edit Goal
	$\smile$
\$0.00	\$0.00
Badges	
Badges are fun things you can earn.	
Personal Donations	Add
No donations found.	

• From the Your Fundraising Progress section, Click the "Edit Goal"

Edit Goal	2
\$ 2500	¢
Cancel	Save

- Enter your new goal in the field
- Click "Save"

#### **Manage donations**

If friends or family prefer to give you cash or cheque donations, you can email us to enter these gifts in your Participant Centre to keep track of your progress and update your fundraising totals. See below for details about submitting offline gifts.

#### Submitting offline gifts

Download our Fundraising donation pledge form on our website and use it to record your donors' information. Once you finish fundraising, you can submit all cheques and cash donations by mail to:

UHN Foundation 550 University Ave, 3rd Floor, Room 3-144 Toronto, ON M5G 2A2

Make the cheque payable to: UHN Foundation

In the memo field include: Your name and "fundraising"

To have these donations included in your fundraising page total, please contact us at <u>fundraise@uhn.ca</u>

#### **Email overview**

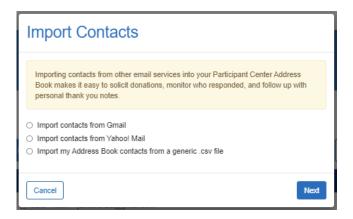
You can use the built-in email tools to ask friends and family for donations or send thank you messages to the donors that support your fundraising. Templates are provided, or you can craft your own messages.

FOUNDATION	estern	
Home		
Compose Message	Recipients (separate multiple email addresses with a comma)	
Drafts 0	Use a template	~
Sent Messages	Subject	
Contacts	Include personalized greeting What's this?	
All Contacts	H1 H2 H3 P B I U = = = = = = = = • • • • • •	
Never Emailed		
Needs follow-up 0		
Unthanked Donors		
Donors		
Non-Donors		
	Preview & Send Save as templa	ite

• From the Participant Centre home page, select the Email tab

## Import contacts from your email provider

Home			$\frown$
Compose Message		Email All Email Selected Delete Selected Add to Group	Add a group Add Contact Import Contacts
Drafts	0	All Contacts	Search Q
Sent Messages	0		â
Contacts			
All Contacts	1		
Never Emailed	1		
Needs follow-up	0		
Unthanked Donors	0		
Donors	0		
Non-Donors	1		



- Click All Contacts, then the Import Contacts tab
- Select your email provider and click "next"
- Follow the instructions provided

#### Note:

UHN Foundation <u>does not have access to your contact list</u>. Imported contacts are for your personal use only. If one of your contacts makes a donation, UHN Foundation will receive their contact information, as required for tax receipting purposes and gift impact reporting.

#### Add contacts manually

Add Contact	Help Log Out
First	
Last	
Email *	Add a group Add Contact Import Contacts
	Search
Cancel	û

- To add contacts manually, click "Add Contact"
- Update the information in the fields provided
- Click "Add"

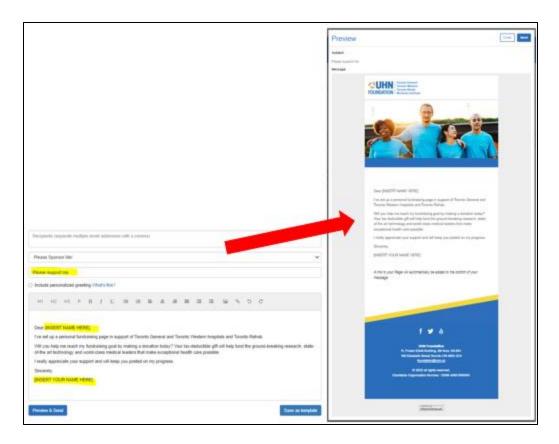
## Using an email template

Home Email Compose Message		Recipients (separate multiple email addresses with a comma)	
Drafts	0	Use a template	~
Sent Messages	۰	Use a template Solicitation	
Contacts		Please Sponsor Me! Thank You Thank you for Donating to Me	
All Contacts	1	Other Blank Message	
Never Emailed			
Needs follow-up	0		
Unthanked Donors	٥		
Donors	0		
Non-Donors	1		
		Preview & Send	late

- Select the type of message (Thank You, Solicitation) and then select the template you'd like to use
- Your selected template will appear

Home Email	
Compose Message	Recipients (separate multiple email addresses with a comma)
Drafts	Please Sponsor Me!
Sent Messages	Please support me
Contacts	Include personalized greeting What's this?
All Contacts	H1 H2 H3 P B I U = = = = = = = = • • • • •
Never Emailed	3
Needs follow-up	Dear [INSERT NAME HERE], I've set up a personal fundraising page in support of Toronto General and Toronto Western hospitals and Toronto Rehab.
Unthanked Donors	Will you help me reach my fundraising goal by making a donation today? Your tax-deductible gift will help fund the ground-breaking research, state- of-the art technology and world-class medical leaders that make exceptional health care possible.
Donors	I really appreciate your support and will keep you posted on my progress.
Non-Donors	Sincerely, [INSERT YOUR NAME HERE]
	Preview & Send Save as template

- The email message editor works similar to Microsoft Word
- Customize your message: if you like, you can update the subject line and template message
- Be sure to update where is says [INSERT NAME HERE] and [INSERT YOUR NAME HERE]



- Once you've updated the template you can preview the message by clicking "Preview and Send" button.
- A preview of your email will appear. Close the preview then click "Save as template"

## Send your email

Home Email		
Compose Message		Recipients (separate multiple email addresses with a comma)
Drafts	0	Please Sponsor Me!
Sent Messages	0	Please support me
Contacts		Include personalized greeting What's this?
All Contacts	1	H1 H2 H3 P B I U III III III III III III III III I
Never Emailed	1	
Needs follow-up	0	Dear [INSERT NAME HERE], I've set up a personal fundraising page in support of Toronto General and Toronto Western hospitals and Toronto Rehab.
Unthanked Donors	0	Will you help me reach my fundraising goal by making a donation today? Your tax-deductible gift will help fund the ground-breaking research, state- of-the art technology and world-class medical leaders that make exceptional health care possible.
Donors	0	I really appreciate your support and will keep you posted on my progress.
Non-Donors	1	Sincerely, [INSERT YOUR NAME HERE]
		Preview & Send Save as template

• You can email two ways. First option is to manually add email addressed to the composed email

Home Email Compose Message		Email All Email Selected Delete Selected Add to Group	Add a group	Add Contact	Import Contacts
Drafts	۵	✓ All Contacts		Search	٩
Sent Messages Contacts	0				î
All Conflacts	8				
Never Emailed					
Needs follow-up Unthanked Donors	0				
Donors	0				
Non-Donors					

- The second option is to go to the "All Contacts" tab and then select who to include in the email list.
- Select your email message (includes saved templates) and click Send.
- Use the checkboxes on the left to include uploaded to your email list

Home Email		
Compose Message		Adda Tana and Age and A
Drafts		Use a template
Sent Messages	٥	Use a template Solicitation
Contacts		Please Sponsor Mel Thank You Thank you for Donaling to Me
All Contacts		Other Blank Message Tour Saved Templates
Never Emailed		Please support me
Needs follow-up		
Unthanked Donors		
Donors		
Non-Donors	۵	
		Preview & Send Save as temptate

- Preview your message
- Click "Send" and you're done!

## Making a donation to a fundraiser

#### **Fundraiser search**

You can search by honouree, fundraiser, or group. From the main navigation click "Donate".

1. Search by Honouree

COUNDATION Toronto General Toronto Breaken Boundation Michener Institute	HOME ABO	UT 🗸	SUPPORT -	START A FUNDR	AISER 👻	LOG IN	FUNDRAISE	DONATE
Donate to a Fundraiser								
Search for the fundraiser you wish to support.								
Honour	ree	Fund	draiser	Grou	p Fundraiser			
Search by honor	aree name:							
Minimum 3 cha	racters required.							
Honouree								
SEARCH								

- Search by honouree:
  - For memorial pages, the honouree would be the deceased
  - For celebrate pages, the honouree is the occasion ex. Julie's Birthday, Barb and John's Wedding Anniversary, Christopher's Graduation

Alternatively you can leave the field blank and click "Search" to show a list of all pages listed by Honouree.

### Honouree search results

Donate to a Fundraiser				
Search for the fundraiser you wish to support.				
Honouree	Fundraiser	Group Fundraiser		
Search by honouree name: Minimum 3 characters required	L.			
Julle's birthday				
Honouree Results:				
Julie's Birthday Fundraiser       Fundraiser: Tara Tassone       VIEW PAGE     DONATE TO PAGE				

- To view the fundraising page click the link above or the view page button
- To make a donation to the page, click donate to a page

## 2. Search by Fundraiser

Search	n for the fundraiser you wish	h to support.
Honouree	Fundraiser	Group Fundraiser
rch by fundraiser's name: imum 3 characters required	1.	

- If you know the name of the person who set up the fundraising page, search by fundraiser
  - Enter the first and last name

Alternatively you can leave the field blank and click "Search" to show a list of all pages listed by Fundraiser.

## Fundraiser search results

Donate to a Fundraiser					
Search for the fundraiser you wish to support.					
Honouree	Fundraiser	Group Fundraiser			
Search by fundraiser's name Minimum 3 characters requi					
tara	Last Name				
SEARCH					
	Fundraiser Results:				
Tara Tassone Honouree Name: Baseball for Brain Research					
	VIEW PAGE DONATE TO	) PAGE			

- To view the page click the link above or the view page button
- To make a donation to the page, click donate to a page

## 3. Search by Group Fundraiser

Donate to a Fundraiser					
Search	Search for the fundraiser you wish to support.				
Honouree	Fundraiser	Group Fundraiser			
Search by Group Fundraiser nat Minimum 3 characters required					
Group Fundraiser Name					
SEARCH					

- If you are looking for a group, search by group
  - Enter the group name

Alternatively you can leave the field blank and click "Search" to show a list of all pages listed by Group. Group search results

Donate to a Fundraiser				
Search for the fundraiser you wish to support.				
Honouree	Fundraiser	Group Fundraiser		
Search by Group Fundraiser na Minimum 3 characters require uhn SEARCH				
	Group Fundraiser Results:			
Group Fundraiser for UHN Captain: Tara Tassone Irwin         VIEW PAGE       DONATE TO PAGE				

- To view the page click the link above or the view page button
- To make a donation to the page, click donate to a page

#### TOTAL RAISED \$500 Goal: \$500.00 DONATE e 🛛 🖬 Tara's Baseball for Brain Research Page Donors In taking money in support of the work of Toronto Ceneral and Toronto Western Hospitals es you donate to my personal fundracing page, you are teching to fund the groundbreak esearch, state-of-the-art technology and -in-mail metrical leaders that make dor ever Patricia Glover \$100 ealth care possible \$50 Jim Invia Freese make a gift today DONATE View all donors for Individual Page

## Making a donation from a page

- From the fundraising or group page, click the donate now button
  - This will take you to the donation form

## **Donation form tips**

		TOTAL RAISED \$500		
Thank you for supporting Baseball for Brain Research. Your gift to UHN Foundation will help us pursue the knowledge that will make all our lives better. * SELECT GIFT AMOUNT • \$500.00 • \$100.00 • \$500.00 • Enter an Amount		100%	Goul: \$500.00	
	Tara's Baseball for Brain Research Page			
None to Signey or Arrest http:/	I'm reliaing money in support of the work of Toronto General, and Toronto Hestern Hospitala.	Donors		
	durate to an aeronial fundrations page, you are helping to fund the groundbreaking	Patricia Glover	\$100	
Res, show my donation amount on the donor listing.	Please make a gift toolay'	Jim Irwin	\$50	
Include a private rota to the page creator:	DONATE	View all donors	for Individual Page	

- As a donor to a fundraising page, you have the option of having a recognition name visible on the donor scroll on the fundraising page, as well as the option of including your gift amount
- In the example above, the recognition name is "Sample Donor" and the gift amount is \$25
- When you include a <u>personal note</u>, this is delivered to the fundraiser in their Participant Centre. <u>It is NOT public facing: it is only shared with the fundraiser.</u>