TeamUnify™

HOW-TO'S - TIPS - TRICKS

BEST PRACTICES

Complete Participant
Setup Guide for the
Event Fundraising System

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Participant Setup

2012 Swim-A-Thon Team Fundraising Swim Event ① **Please Help**

Amount Raised: $640.00   Goal Amount: $10,000.00

Tips and Tricks

To access your fundraising setup for allowing donors to sponsor your athlete, simply select the banner on your site.

① Event Fundraising is easy to setup for each individual athlete. You should have received a launch letter from your administrator with a link that will bring you directly into your setup page. If you have not received this simply select your fundraising banner to access your setup.
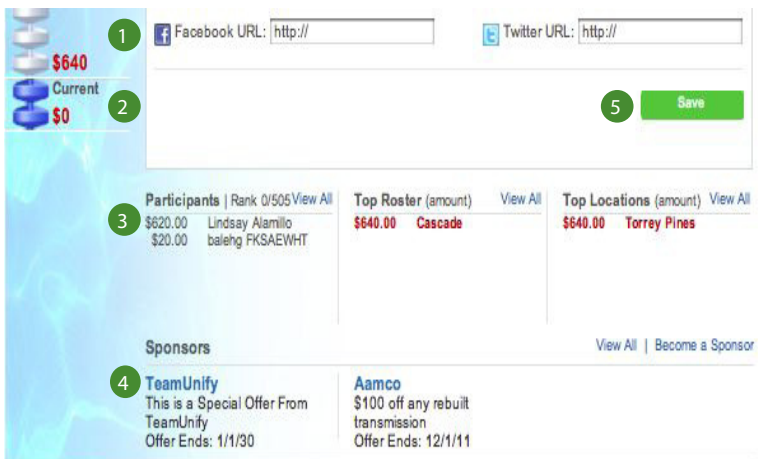
Click on Setup Tab
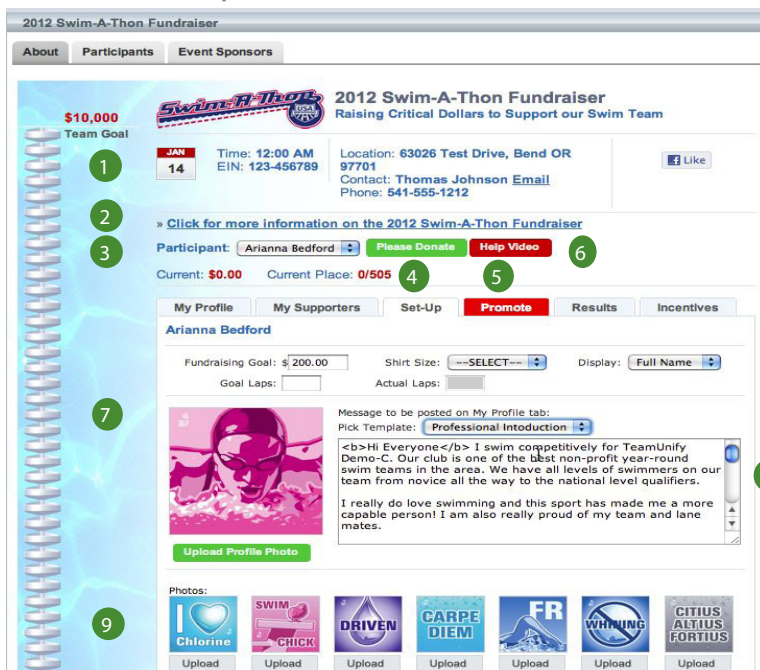
Tips and Tricks

The best way to get your athlete involved is to have them help you setup their profile. When kid's take ownership of the fundraising it becomes important and exciting to watch their goal being reached. Swim teams rely on this money to be better clubs and help your athlete be an all around stronger athlete.

Use the pictures to represent your athlete and to show the donor what type of person and swimmer they are. Have fun with this portion!

① **Fundraiser Information** - This area has been setup by your Administrator. It will give you information about the fundraiser including the date, time, tax number if applicable, location, contact, and phone number.

② **More Information** - This is an expandable feature that is viewable to yourself and any potential donors. Select it for more information on your fundraiser.

③ **Participant Area** - Once you are logged in, all of your children will appear in this dropdown. Select your child to begin the setup of their profile. The public will be able to then select an athlete and the corresponding 'please donate' button to ensure the can donate to the athlete of their choice. Their current donation total and 'dollar' place on the team will be viewable as well.

④ **Setup Tab** - You must select this tab to setup each child. This tab is viewable to logged in parents only to allow for individualized setup for each athlete.

⑤ **Promote** - Select this tab to help promote the fundraising event. See page 3 for more help.

⑥ **Help Video** - Select this for a video to guide you through your setup process.

Participant Setup

7 Participant Information - Select your fundraising goal, laps that you would like to complete (if applicable), shirt size, and display name. Actual laps will be added by the administrator.

8 Message to be posted on my Profile tab - Select a pre-templated message that you can edit by using the template drop down or simply type into the text box to create your own.   This message will appear on the profile page to potential donors.

9 Photo Upload - Upload both your swimmer's profile picture and additional pictures to help show off some of your child's achievements, hobbies, strokes, or even just something fun. Your site also comes with some great pre-loaded pictures. Simply select library in your options.

Tips and Tricks

Haven't gone social yet? Facebook and Twitter are proven marketing outlets for fundraising. It's a great way to not only show how proud you are of your athlete(s) but also to let your friends and family know they are working hard to raise money for a great sport!

1 Social Networking - Enter in your Facebook and Twitter URL to help market this fundraising event. Go social and see how many people you can reach! Don't forget to leave the http:// in the field before you enter in your www.facebookURL.com.

2 Lane Progression Goal Marker - Keep an eye on your lane line to see how close your team is to meeting your goal amount.

3 Top Earners - Keep an eye on this area to see who are the top earners based on different criteria.

4 Sponsors (if applicable to your team) - Your admin has the option of showing any team sponsors that have gone through the team sponsor center.

5 Save - Don't forget to select save to ensure all of the work you have done is saved. Select the tab "My Profile" to see the results.
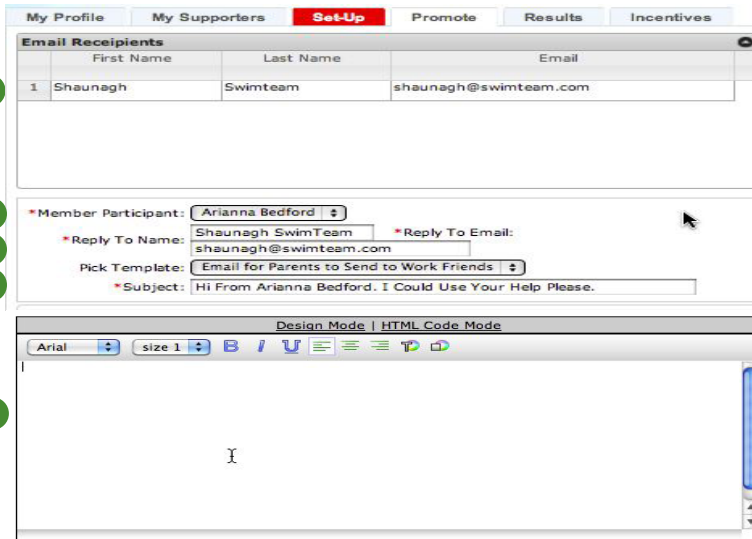
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Promotion

Click on Promotion Tab

Tips and Tricks

Easy Import is a great way to contact your friends and family. Select this option to use your extensive e-mail list that you have already spent years creating.

1. Easy Import (Gmail, Yahoo, Hotmail, AOL, Plaxo) - Use this selection to easily login to your personal e-mail account and pull your current email list into your promotion tool.

2. Manual Add - Select manual add to update the e-mail list.

3. Remove - Place a check mark in the box to the left of the First Name column header and select remove to delete that e-mail account.

4. Current list of e-mail that have not been sent an invitation (see step 6).

5. Save - Select this button to save this current list only. No e-mail will be sent.

6. Save and Send Invitation - Select this button to send an e-mail invitation to donor (See next page).

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⑤ Promotion

The templates are a great way to reach your potential sponsors. What is the nice about this feature is that it will bring in your account names, team information and other data automatically. Select a template and look for the bold lettering. This usually means it is bringing in data from your fundraising system.

1 Donor E-mails - This area lists the potential donors that were selected in your 'Enter E-mail' screen previously.

2 Member Participant - Select the athlete that this e-mail is referencing.

3 Reply to Name/Reply to E-mail - The system will automatically pull the account name and e-mail into these fields. The e-mail will be sent from this name/e-mail address and any replies will be sent to the e-mail noted.

4 Pick Template - Use the arrow drop down to select a pre-templated e-mail created by TeamUnify which you can edit, or leave it on -Select- to create a custom e-mail to be sent to potential donors.

5 E-mail body - Fill in the Subject and E-mail body. Use the e-mail formatting options to add formatting.
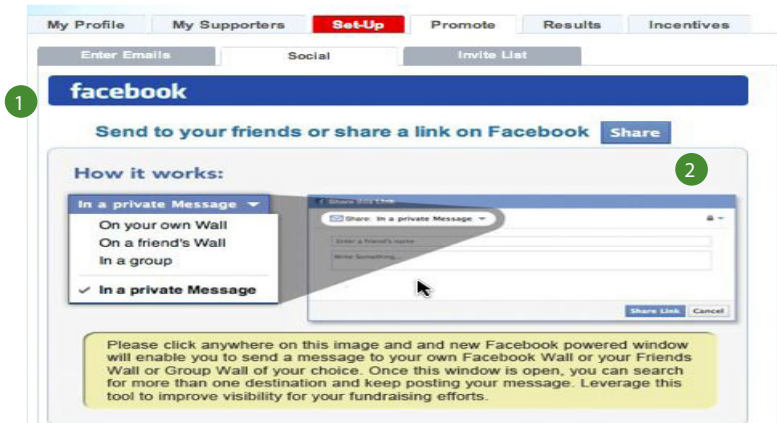
E-mail NOW - Don't forget to e-mail this out by selecting the e-mail button.

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Promotion

Tips and Tricks

Facebook is a great way to reach your friends and family. There isn't an easier way to get your message out than using the share button. Get Social!

1 Social Tab - Select the social tab to access the share link functionality.

2 Share - Select this button to bring you to the Share Link button to add this fundraising event to your Facebook page.

Tips and Tricks
Use the e-mail function to send a thank you letter to all of your donors. Use the filter option, 'All Donors (this event), select all and select e-mail selected.

1 All Donors (this event) - Use this filter selection to show All Donors (this event), Not Donated (this event), or Donated this event.

2 All Donors (ever) - Use this filter to selection to show All Donors (ever), Not Donated (ever), or Donated (ever).

3 Add New - Select this button to add a new E-mail address to the invite list.

4 Delete Selected - Place a check mark to the left of one or many e-mail accounts and select Delete Selected to remove them.

5 E-mail accounts - This screen shows all e-mail accounts that have been sent a fundraising e-mail from this module.

6 Donor this event/Donor ever - These columns will show a N (no) or a Y (Yes) to quickly denote who has or has not donated either by event or lifetime.

7 E-mail Selected - Place a check mark to the left of one or many accounts and select the button, E-mail Selected, to send a pre-templated e-mail or user defined e-mail.

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Incentives & Management

Click Results Tab

1. Financial area - This summary area will show you any offline donations made but not approved, total amount raised (offline plus any amount donated through the site), and the number of supporters.

2. Add Offline Donor - Use this button to add a donor who does not go through the site to donate money. This function only allows cash or check and will not be considered official dollars raised until the administrator approves it.

3. Donor information - All donor information regarding financials will show including any comments left during the donation.

4. Export - Use the Export button to produce an Excel spreadsheet with all donor information including Donor name, participant receiving donation, Account name, and donor financial information.

5. Keep Promoting - Selecting this option will bring you to your invite list.

Tips and Tricks
Show your participant this area so they can quickly see what incentives are available and where they are compared to the rest of their teammates.

1. Participant Incentive Information - This area includes the participant name, keep promoting button which brings you to your invite list and the number of days left to reach the incentive goals.

2. Incentive Levels - All incentive levels setup by your administrator will be viewable. Simply select a grey bar to open up for more information (see next instruction).

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Incentives & Management

Click on Incentive Tab

Tips and Tricks

Incentives are a great way for your participant to see the results of their efforts. It's a way for the team to thank them for their efforts and support of the swim team.

1 Incentives - All incentives available for this fundraiser will be available to view in this area. The participant will be able to see the name of the incentive, $ to next level, and all information to understand the incentive levels.

1 My Event Fundraising - Select this button located under TUMoney to access your event fundraising management section.

2 Filters - Set your filters to search for specific donor information. You can search for fundraiser specific donors or even donations over a life-time. Once you chose your filters, select search to show your results.

3 Financial Summary - View your financial results based on your filters.

4 Delete Not Approved - Place a check mark next to a donor that was not approved by the administrator and select Delete Not Approved. Reasons for using this function may be that your donor did not supply the check or cash amount as decided upon through the 'Offline Donation' function.

5 E-mail Receipt - Place a check mark next to a donor(s) and select e-mail receipt to send them a donation receipt to their e-mail on file. The donor will receive an automatic receipt e-mail when they make their donation.

6 Export - Select this to export to Excel all donor and participant information.

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Notes

Chapter Title

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