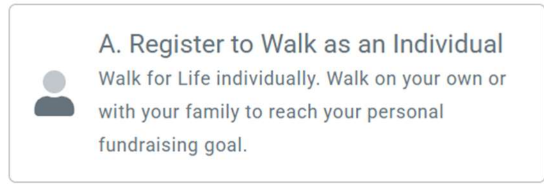
CompassCare Walk
Participant User Guide

Contents

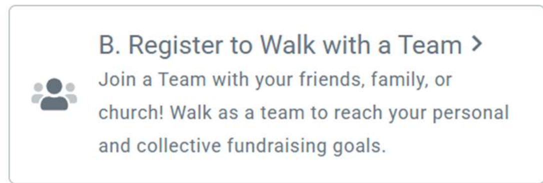
Registering

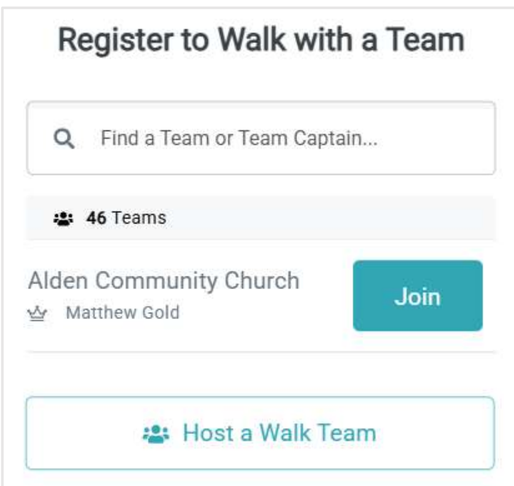
Choose How You Want to Participate in the Walk

A: As an Individual / Family Fundraising Walker - Choose option #1, “Register to Walk as an Individual,” and fill out the necessary forms to get your personal fundraising page activated. Important: If you want to receive a Walk t-shirt and Merch Store rewards for money you personally donate, DO NOT check this box:



B: As a Host / Join a Walk Team - If you’re planning to host a Walk, or join an existing Team, choose option #2, “Register to Walk with a Team.”





To Join an existing team, simply search by Team name or Team Captain. When the correct Team, or Team Captain comes up click on the Join button. You will then be redirected to set up a personal fundraising page, or register to walk. If you choose not to raise funds, please see the details above under “Register to Walk as an Individual.”

To Host a Walk Team, simply click on the “Host a Walk Team,” (you may need to scroll down) which will redirect you to the “Start a New Team” page.

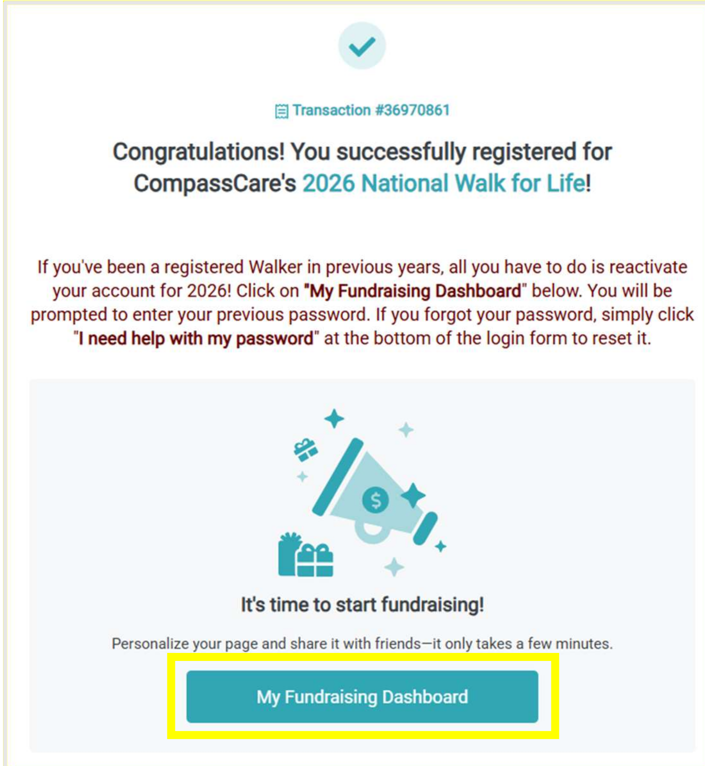
Fill out the required information on the “Start a New Team” page and click “Save My Team.” You will now be designated as the team captain and have the ability to change and update information on the team page, as well as receive email prompts when someone joins the team.

As a registered participant of this event, you have a variety of tools at your fingertips to help you reach your goals! Your fundraising center will be the hub for managing your involvement and fundraising activities.

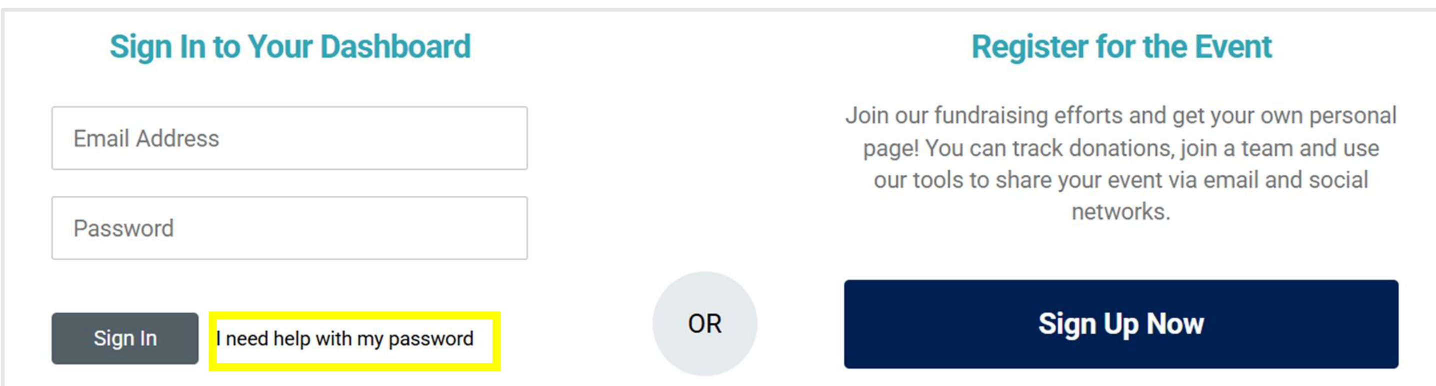
Returning Participants

If you use the same email to register as you have in the past, our system will remember you!

Once you’ve completed the registration form, you will see the following page. Click **My Fundraising Dashboard** to be taken to your login page.



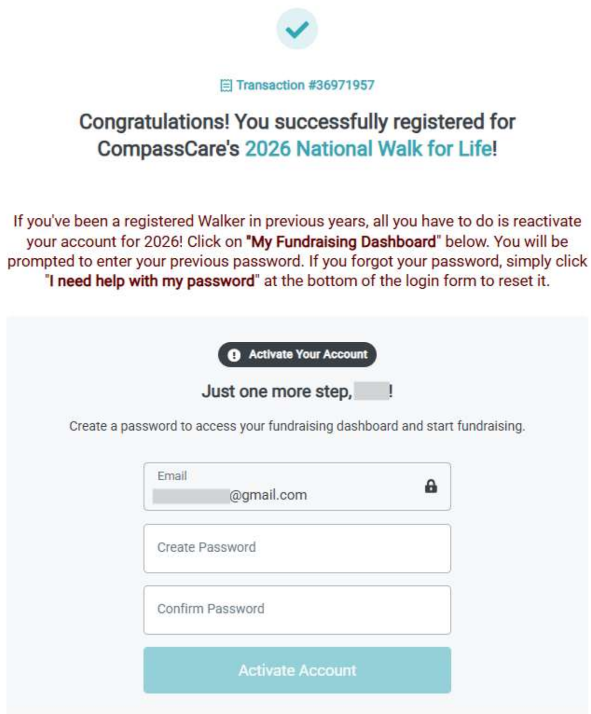
Enter your password to complete the login process, or if you can't remember it, click "**I need help with my password**" to reset it. Note that your **email** can't be edited at this point.



You'll be taken to your Fundraising Dashboard to complete your profile (if you've been invited by personalized link, you will see your customizations from the previous year).

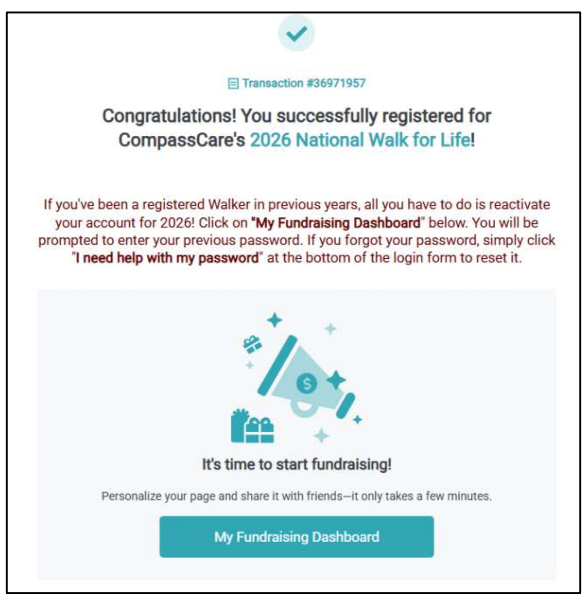
First-Time Registrants

Once you've completed the registration form, you will be asked to select a password for your fundraising account.

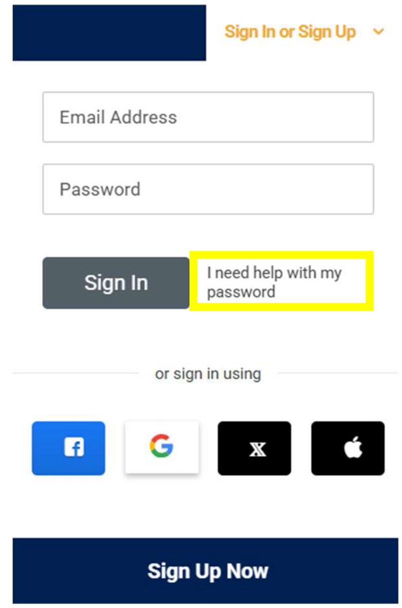


Enter your preferred password and click **Activate Account**.

You'll then see the following message. Click **My Fundraising Dashboard** to be taken to your fundraising page.



Logging In



Once logged out for the first time, you'll want to access the **Event Home Page** to get logged back in. You can do so by either clicking on or hovering over the **Sign In or Sign Up** area in the top right of the screen. Here, you'll enter the credentials you created during registration.

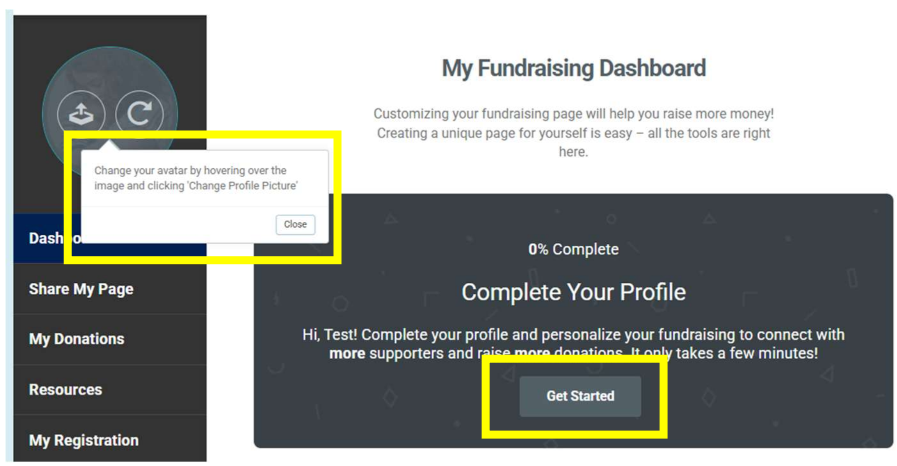
If you can't remember your password, click the "I need help with my password" link to the right of the **Sign In** button, where you'll be able to enter your email and generate a reset password email.

If you forget your username, you can either reference your initial registration email or contact the entity hosting the event.

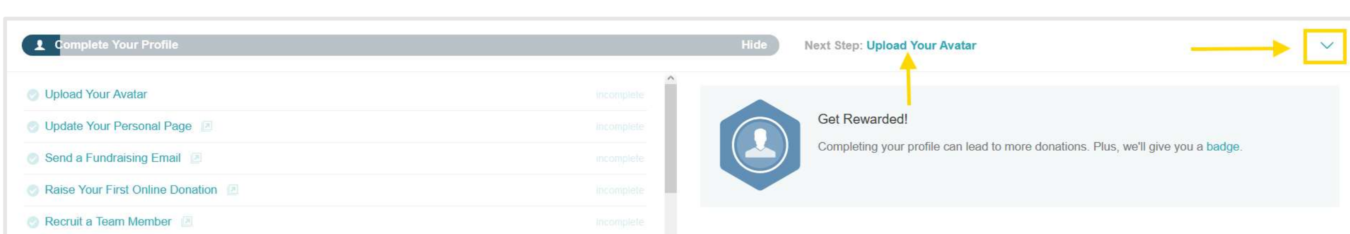
HINT: Usernames are always email addresses.

Setting Up Your Fundraising Page

You'll be prompted to begin completing your profile as soon as registration is completed. Click "Get Started" and you'll first be prompted to upload your profile photo.

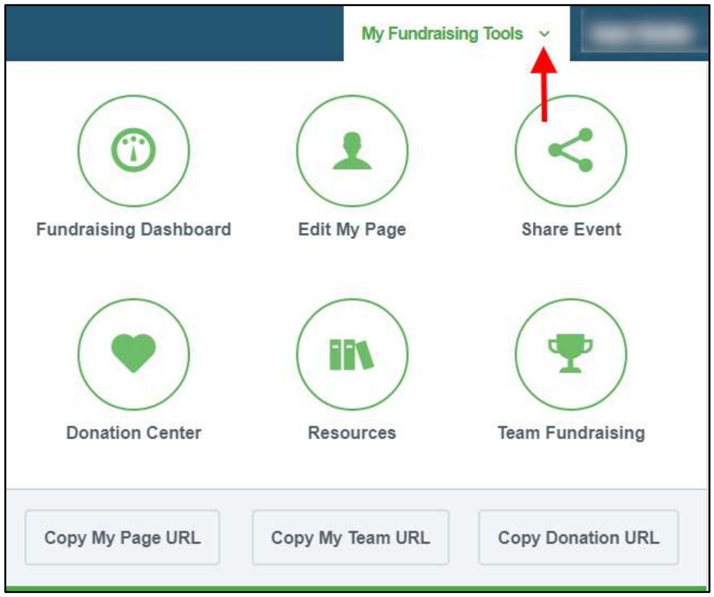


You can continue and track your setup progress at the bottom of the page, which is designed to help walk you through the main components of your **Fundraising Dashboard**. As a bonus, you'll receive a badge upon completion. To view this section in full, click anywhere in the progress bar, or use the carrot to the right.



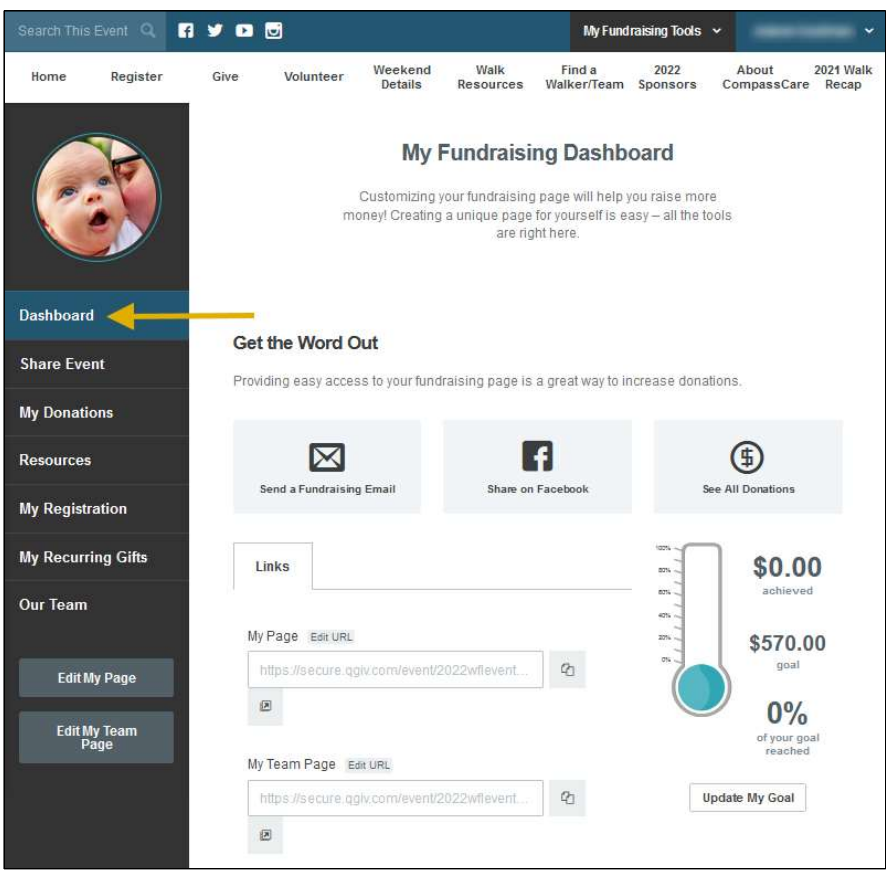
My Fundraising Tools

You can navigate to all areas of your **Fundraising Center** and copy URLs for your personal/team fundraising pages, as well as your personal donation page, from this dropdown.

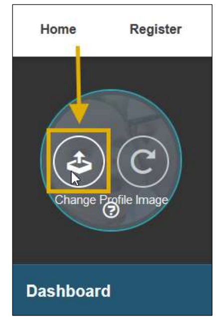


Fundraising Dashboard

You may also navigate between the different areas of your fundraising center via your **Fundraising Dashboard**. You'll see a menu down the left side that contains the same navigation items as your **My Fundraising Tools** dropdown, along with a few additional options/pieces of information.



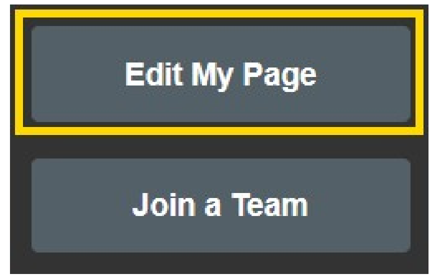
Personal Avatar



The avatar will be used on your personal fundraising page and throughout the system on activity feeds such as leaderboards, recent activity feeds, etc. By default, the avatar contains a default image.

To upload an alternate image, hover over the current default and click the **Change Profile** Image area. You can access and change your personal avatar even if you navigate to a new area of your fundraising dashboard; it will always be displayed above the menu along the left side.

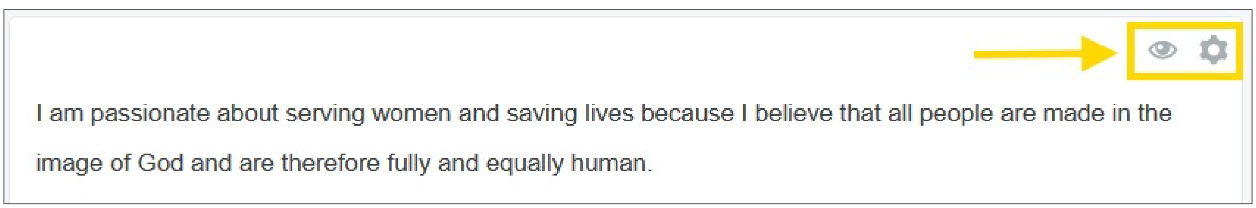
Edit My Page



The **Edit My Page** button will take you to the content management system, allowing you to customize the look of your fundraising page. In this area, you can customize your personal fundraising page. Your ability to customize different areas of your page is managed by the nonprofit organizing your event. If you're unable to edit or move certain widgets, it's more than likely because your admin has not enabled this functionality.

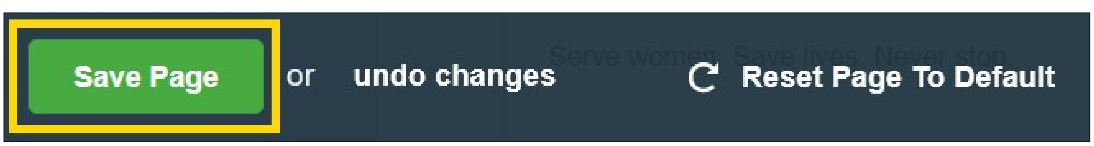
After you click the **Edit My Page** button you'll see a number of boxes that allow you to customize your page. These boxes are called widgets.

To edit a widget on your page, click on the gear icon in the top right-hand corner of the widget. Each widget will provide a variety of options allowing you to edit the look and feel, along with the content, that's displayed. After making your changes, click the **Update** button. Make sure to click **Save Page** when you're done.



To hide a widget on your page, click on the eye-shaped icon in the top right-hand corner of the widget you wish to hide.

Make sure to click the **Save Page** button when you're finished.



Undo changes will undo anything that you've not yet saved, and **Reset Page to Default** will take the page back to the default settings defined by the admin.

Links

You can find these shareable page links on your Fundraising Dashboard.

My Page: This is your fundraising page URL. You can edit URL if you're interested in appending something to the end. You can click to copy button to copy the URL to your clipboard and then paste it wherever you'd like to use it. Use caution if you add an ending to the URL. If you change the URL after you've already posted links to your page, the links will be broken!

My Team Page: This is your Team fundraising page URL. You can only append this URL if you are the Team Captain. You can direct sponsors to either page, but note that you will not get personal credit for donations made directly to your personal page.

Important Note: Always grab your shareable URL from the section of your Fundraising Page depicted in the image above. DO NOT share the URL from your browser—it is not the same.

Thermometer

Your **Fundraising Dashboard** includes your thermometer, which displays how much you've raised thus far, your individual goal, and the percentage of your goal you've currently raised.

You're able to update your goal by clicking the **Update My Goal** button below the thermometer.

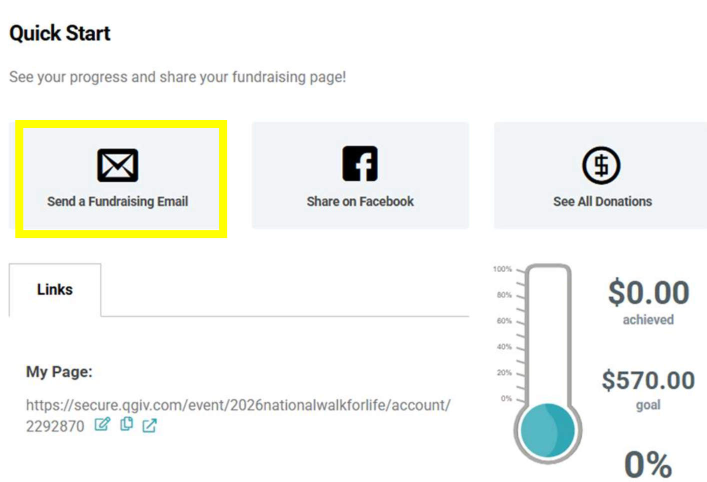
To the left of the thermometer is your fundraising table, which breaks down the types of donations you've received. This makes for easy tracking!

Share Event

Earn more donations by sharing your event with friends and family! In this tab, you're given the tools to share the event and your personal and team pages via email and social media.

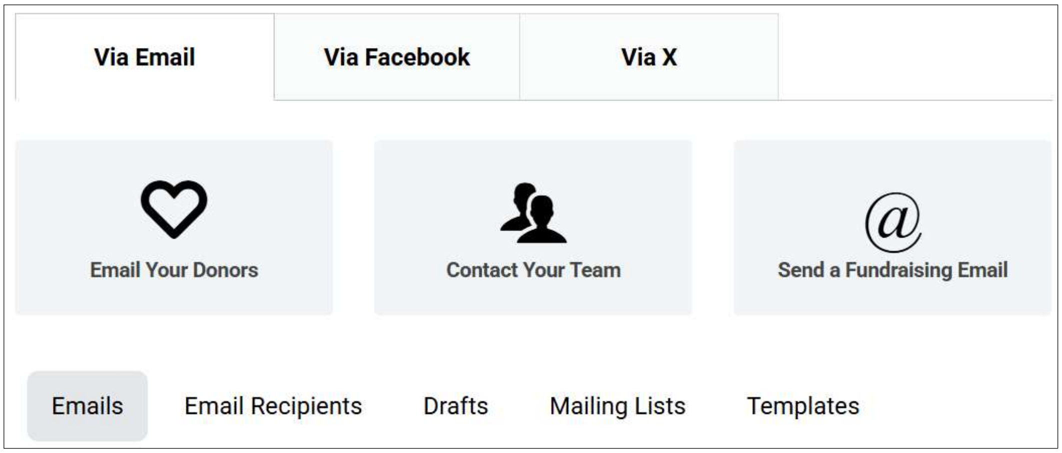
Send a Fundraising Email

Under the **Quick Start** section, click on **Send a Fundraising Email**. (Before you can start sharing via email, you will need to click to verify the email address you used to register. Be sure to check your spam folder for the verification code!)



The **Via Email** tab allows you to create mailing lists and emails you can schedule or send immediately. You're able to create your own templates or use any your admin has defined for you. To display the Emails, Email Recipients, Drafts, Mailing Lists, and Templates tabs, click the **Email Management** button.

If you're just getting started, you'll probably want to create a new mailing list filled with your own personal contacts. If you'd like to bypass this step, you're able to enter email addresses as part of the email creation process.



Creating a Mailing List

1. Click the Mailing Lists tab and choose **+ New List**.
2. From here, you'll be able to enter a name for your list to make it easy to find in the future, and enter or import your desired email addresses. Building the mailing list is easy; just enter your email addresses in the **Mailing List Emails** box, separated by a comma, or click on the **Import Email Addresses** button. Once you've completed your list, you should click **Save List** to continue.

Creating an Email

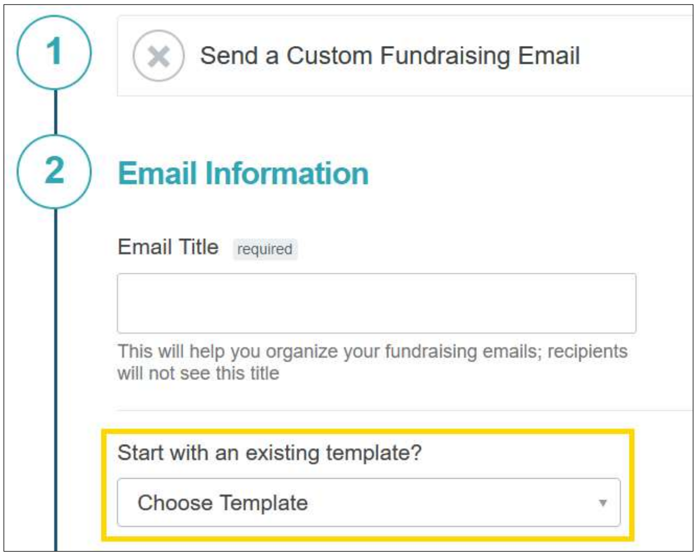
1. Choose if you want to email your donors or send a fundraising email. Click the corresponding button. If you're part of a team, you'll also see an option to email your teammates.

You may or may not see all of the above options. This will depend on if you have any donors at the time you're sending the email and/or if you're part of a team.

Email My Donors: Email anyone who has made a donation to your page.

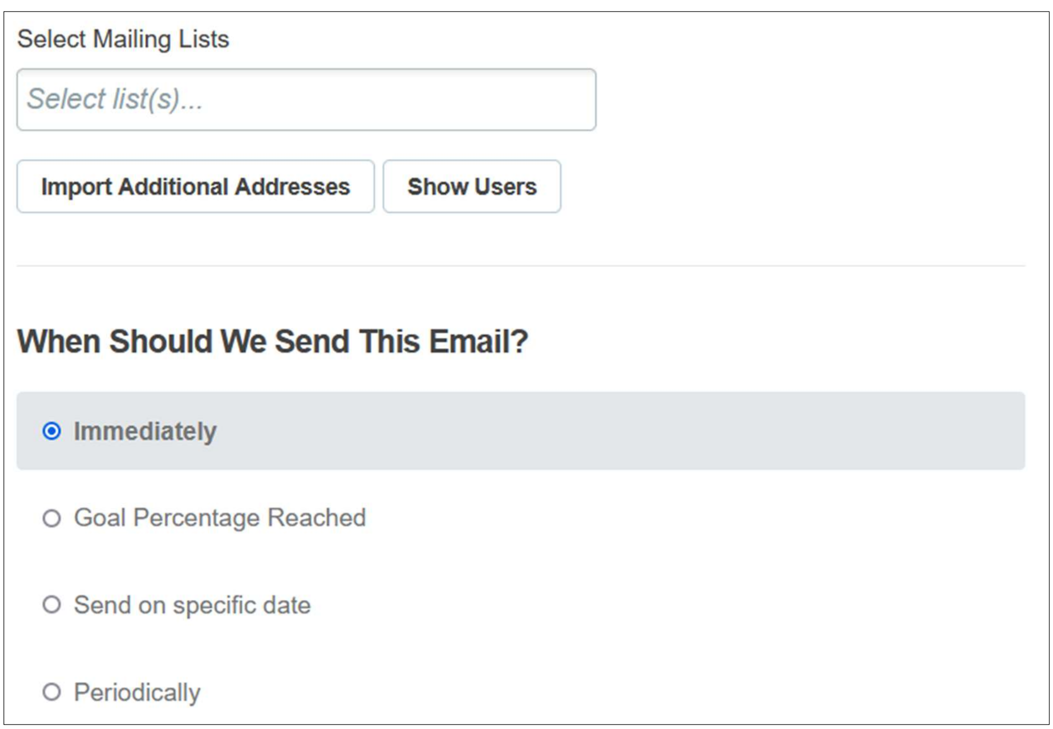
Email Team Members: Email any of your current team members.

2. After choosing your email type and entering a title, you can select a template from **the Choose Template** drop-down, if desired. This drop-down will include any predefined templates provided to you by the admin and/or any templates you've created in the templates area of your fundraising center. Once you choose a template, the **Your Message** section of this area will be populated with the content and can be modified as you wish.



If you don't wish to start with an existing template, you can choose to skip that drop-down and create your own unique content in the **Your Message** section.

You'll have the flexibility to choose an existing mailing list, import email addresses, or use the **Additional Emails** box to enter emails manually. The system will display how many people the campaign is being sent to as you add emails and mailing lists.



3. Next, you'll define recipients for your message, along with when you'd like the email sent. You'll see four options listed. You can create and send the campaign immediately, or choose one of the other three options that will

schedule the campaign to send once the parameters outlined are reached.

Goal Percentage Reached: Define a percentage of your goal you'd like to be reached before the system would trigger the email to be sent. To use this option, click on the blank space in the sentence "Send my schedule when I've reached ____% of my goal" and enter your desired percentage.

Send on Specific Date: Define a date and time to send the email if you're not interested in sending it immediately.

Periodically: Send the same email multiple times based on what you enter here. You have the ability to send on a daily, weekly, or monthly frequency, and you also have the ability to add a start date.

4. When you're happy with your email, you can click the **Save & Preview Email** button to do just that. If you're not quite done and would like to save your work and come back later, click the **Save as Draft** button.

If you need to make additional changes after the preview, click the **Make Changes** button, which will direct you back to the previous screen. If you're happy with what you see, you'll want to click on the **Send Email** button to either send or schedule the campaign based on your preferences during initial setup.

The **Emails** tab of the **Email Management** section will list all **scheduled** and sent emails for you to view. From this screen you can edit or delete any of your Scheduled emails by choosing the edit pencil or the red X to delete. For any emails that have been sent, you'll see two additional icons. **Clone and Resend**, which looks like two piece of paper, will allow you to make a copy of the email and resend it. You're able to make any modifications you want to make with this option before sending. You'll also see a small green icon that looks like a pie chart, which will allow you to view statistics on your campaign.

Any email that has been saved as a draft and not scheduled or sent will be housed in the **Drafts** tab of this interface with the ability to edit or delete the current content.

Creating Templates

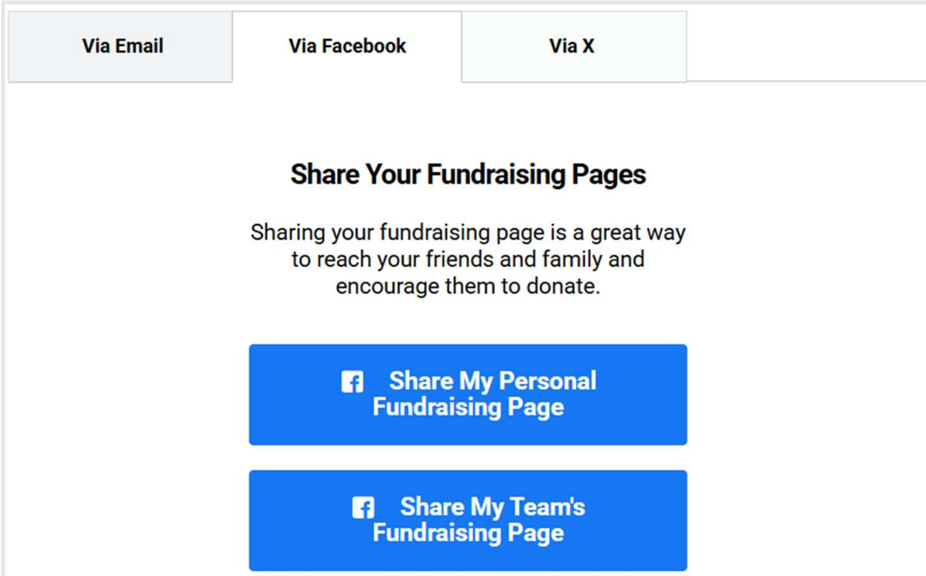
If you'd like to create your own email templates for use within campaigns, you're able to create and manage these in the **Templates** tab in the **Email Management** section of **Share Event**.

Creating your own template is easy!

- Click on the **+New Template** button and enter a Template Name, along with a Subject and Body content.
- Once you're happy with what you've entered, click the **Save Template** button at the bottom of the body content box.
- Once saved, these templates will be available in the template drop-down within the campaign creation screen and available for you to use immediately.

Share On Facebook

You can use the **Via Facebook** tab share your fundraising page or team page with your Facebook followers. In this tab, you'll see a large blue button inviting you to do so.



If you happen to be logged in to Facebook within your browser, you'll be automatically connected. If you're not logged in, a Facebook dialogue box will pop up and ask you to sign in with your Facebook credentials.

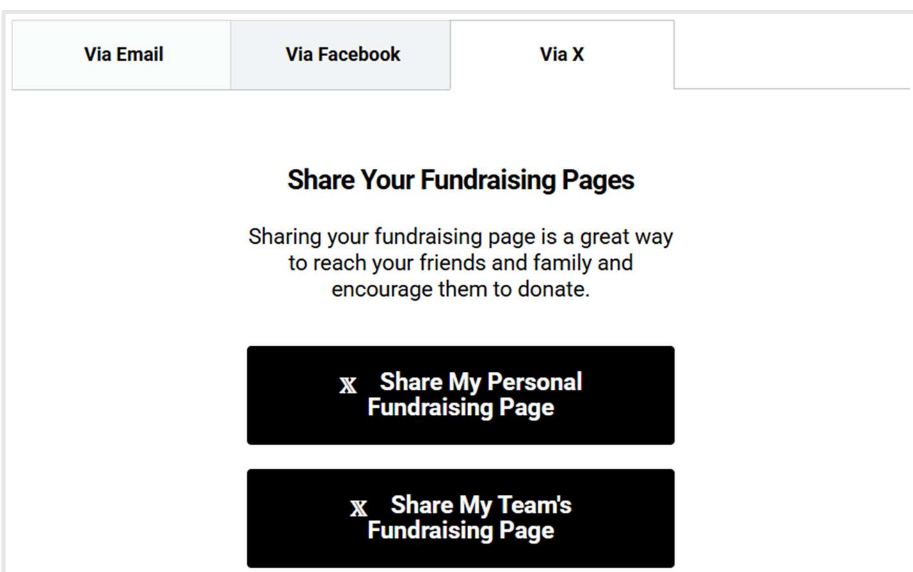
You can share your Personal Page or if you are on a team, your **Team Page**. Add your personal message and post.

Share on X

You can use the **Via X** tab to connect your personal X account to your fundraising center.

Connecting with X is a great way to reach your network of family and friends to spread the word. This tool will allow for manual and automatic posting to make sharing much easier. In order to allow the fundraising center to interact with your personal X page, you MUST connect your X account.

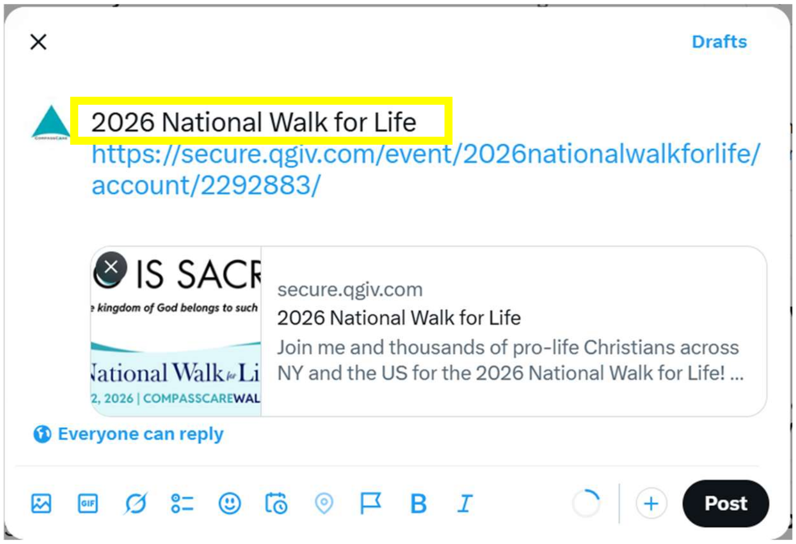
In this tab, you'll see a large black button inviting you to do so.



If you happen to be logged in to X within your browser, you'll be automatically connected. If you're not logged in, a X dialogue box will pop up and ask you to sign in with your X credentials.

Creating a New Post

You can share your **Personal Page** or your **Team Page**. Your post preview will look like this. Be sure to keep the URL, but you can add any additional text above it:



My Donations/Donation Center

This is the area you can visit to monitor your progress. All of your donation activity is housed here for your review.

Updating Your Goal

If at any time you'd like to make a change to your fundraising goal, you can do so in this area. You'll see the **Update My Goal** button right below your thermometer that you'd click, enter your new goal, and save.

Resources

Your admin has the ability to upload resources for your use. Resources often include images, flyers, sample emails, instructions, etc. If your admin has uploaded anything for your use, it will be located in the **Resources** section. The **Resources** interface will allow you to sort, preview, and download any files uploaded by the admin.

My Registration

This is an area where you can manage your registration information, manage permissions, and access the badges area by using the tabs along the top of the window.

Info

In the Registration Info tab, you'll see your **Personal Information**, which may be updated if needed. If you're part of a team or a classification, you'll see the names of those listed here, as well. Once you make any changes to these areas, you'll need to click the **Save Settings** button at the bottom of the page.

Permissions

The next tab is where you'll manage your **Permissions**.

General Permissions

This is where you can manage permissions for the following:

- Being followed up with via email
- Appearing in the search feature throughout the event site
- Appearing in the leaderboards as a top fundraiser if you qualify

Email Notifications

This is where you can manage email notifications for the following:

- Someone donating through your page
- Receiving a badge

Once you make any necessary changes to this area, click the **Save Settings** area to update your **Permissions**.

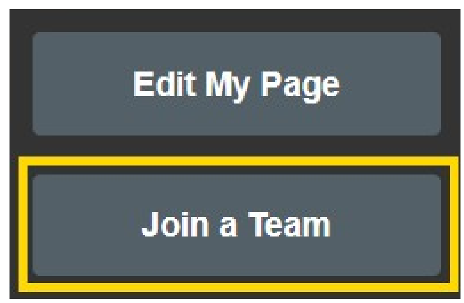
Badges

If your admin has enabled or created badges for your event you'll see this section. Here, all badges you're capable of earning will be displayed, but grayed out. You can hover over any of them for a description of how you would earn the badge.

Any badges you've earned will be in full color and provide the ability for you to share your achievement on Facebook or X. You can share by clicking on the Facebook or X icons located within the box of the badge achievement you'd like to share. A dialogue box will appear for you to add a message before sharing.

Our Team/Join a Team

Join a Team



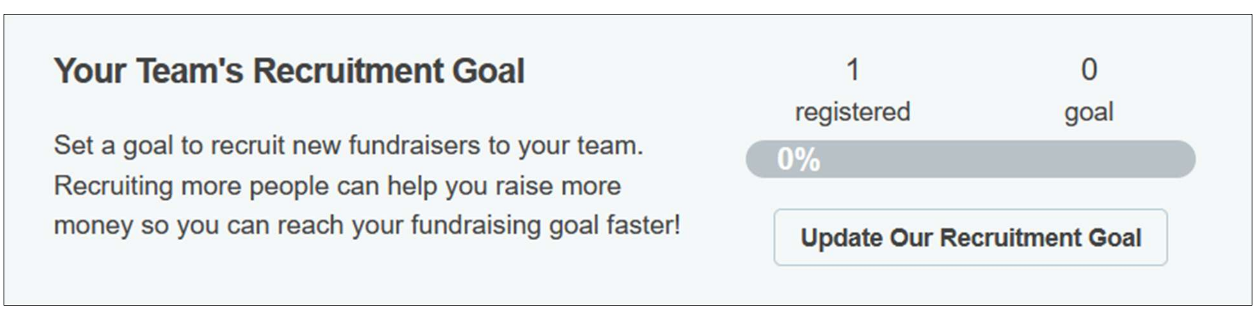
This button will take you to a screen where you can search for teams from a list of existing teams, create your own team, or edit your team page.

If you're on a team but not the Team Captain, the button will say **Our Team.** It will take you to your team's fundraising dashboard and give you a few options for actions to take. If you're not part of a team and would like to join or create one, click **the Join a Team** button.

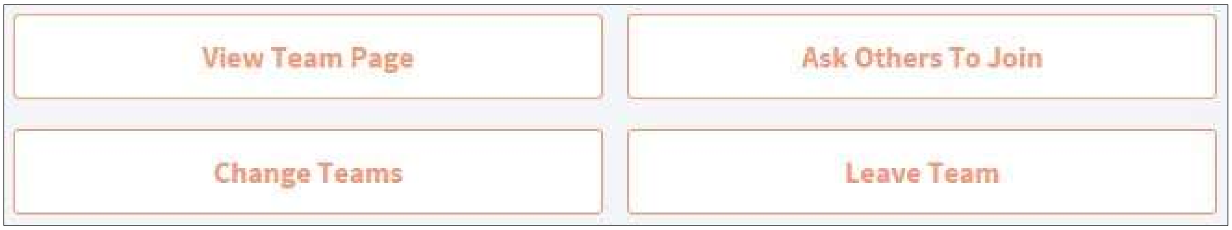
Our Team

This button will take you to your team fundraising dashboard, where you'll see totals for your entire team's efforts, versus your personal dashboard where you see just what you've individually raised. If you're a captain, you'd also be able to update the goal located under the thermometer in the same way it's done in the personal fundraising dashboard area.

If you're the **Team Captain**, you'll also see a recruitment goal tool where you can enter the number of team members you're aiming for. A goal must be set before this will appear on your public-facing team fundraising page.



You'll see the following additional options as a member of a team.



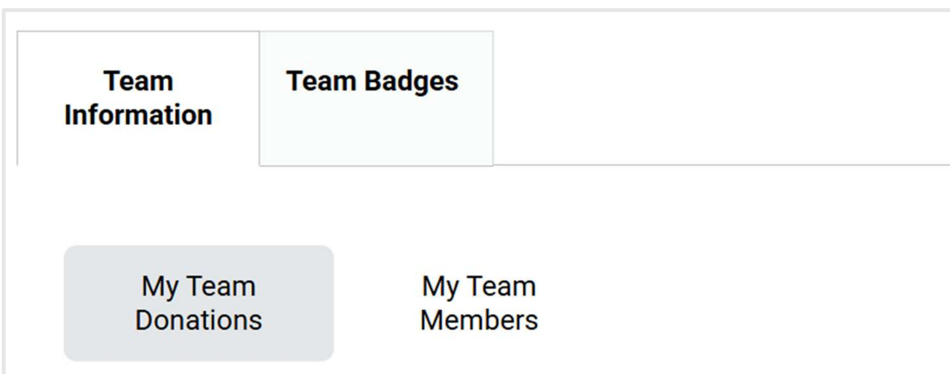
- **View Team Page:** This will display the Team Fundraising Page

- **Ask Others To Join:** This will take you to the Share Your Event tab to create an email inviting others to join your team.

- **Change Teams:** This will take you to an interface that allows you to search and join another team, leave your current team, and/or create a new team.

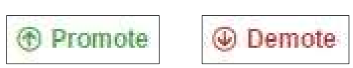
- **Leave Team:** This will allow you to leave the team you are currently on. Once you choose this option, you'll see a pop-up asking you to confirm you'd like to leave the team. Click the **Yes, Leave** button to proceed. If you choose this option, you'll always have the ability to join or create a team in the future.

Below that set of buttons, you have access to your **Team Donations** and **Team Members**.



You can toggle between the two areas to view listings of anyone who has donated to the team and all fellow members of your team.

In the **Team Members** area, you have the ability to promote and demote members of your team if you're a captain.



If you promote someone to captain, they'll have the ability to update goals and edit the team page. Any team members with a yellow star are captains of the team. If needed, you're also able, as a captain, to delete members of the team by using **the red X** in the **My Team Members** area.

Join a Team/Create a Team

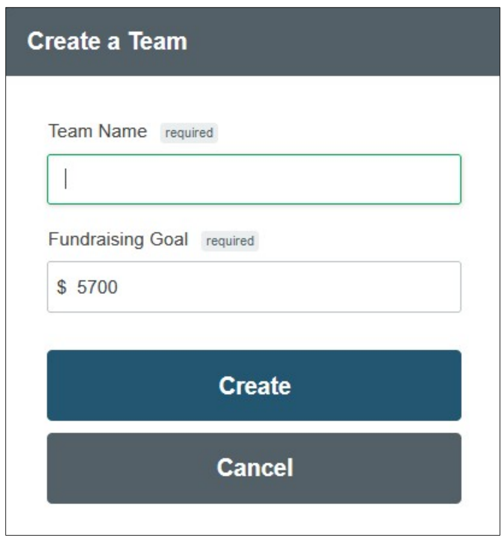
Join a Team

Clicking this button will take you to a page where you can search for and join existing teams, or create a new team if you're registered as an individual.

Searching teams is as easy as entering a search item in the Search Teams box. Once you locate the team you'd like to join, click the **Join Team** button to become a member of the team.

Create a Team

If you click on the **+ Create a Team** button, you'll see a pop up that will allow you to enter a team name and fundraising goal. Once you enter this information, click **Create** to create the new team. You'll now be the captain of the new team and have access to the team dashboard within your fundraising center.



Logging Out

When you're finished setting up your fundraising page, you may log out by hovering over your name in the upper right-hand corner of the screen and choosing the **Logout** option from the drop-down menu. You can log in and make changes at any time.