Social Fundraising for Fundraisers

A fundraiser's reference for using Social Fundraising in NeonCRM by Z2 Systems, Inc.
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For the purposes of this guide, we assume that you have been given a link to an existing Social Fundraising page, or you have received an email asking you to create a fundraising page. If you need help getting to an account creation page, please contact the organization for which you are fundraising.

Creating an Account
In order to create a fundraising page, you need to create an account. You can either create a login name and password unique to your account with this organization, or you can use an existing Facebook or Twitter account to log in instead.

Creating a NeonCRM Account
Begin by clicking Create New Account.

![Create a NeonCRM Account](image)
Enter your **First Name**, **Last Name**, and **Email**.

Create a new **Login Name** and **Password**.

Enter the numbers shown in the image.

Click **Submit** when finished.
Now that you have created an account, **click the Login Link** to log in using the login name and password you just entered.

Thank you for submitting your information!  
An acknowledgement email will be sent to you shortly.

We have created an account for you. You can log into our system using the following information:

- **Login Link**: [https://uat.z2systems.com/np/clients/test/login.jsp](https://uat.z2systems.com/np/clients/test/login.jsp)
- **Login**: jennytest
- **Password**: jen******
  
  *(Note the length of this encrypted password may not be accurate.)*

Enter your new login name and password and click **Log In**.

*It's a good idea to bookmark this page so you can easily find your fundraising page later.*

Once you have logged in, you will be taken to the Social Fundraising Overview page.
Creating an account using Facebook
Instead of creating a new login name and password, you can use your existing Facebook account to sign in.

Click the **Sign in with Facebook** button.

A pop-up window will appear. Ensure that your web browser is not blocking pop-ups on this page.

Enter your Facebook user name and password. Click **Log In**.
Click **Okay** on the next page.

Once you have logged in, you will be taken to the Social Fundraising Overview page.

**Creating an account with Twitter**

Click the **Sign in with Twitter** button.

Enter your Twitter user name and password and click **Sign In**.
Once you have logged in, you will be taken to the Social Fundraising Overview page.
Creating a Fundraising Page
Once you have logged in, you will be taken to the Social Fundraising Overview page. Ensure the correct campaign is selected, then click **Create Page**.
This creates a new fundraising page and brings you to your management page.

Your Fundraising Page For:
An Example Campaign

Page Content
Manage your personal fundraising page.

Fundraising Page Title:
- Guy Neal's Fundraising Page
- [Optional Title]

Fundraising Page URL:
- https://example.com/campaign1
- [Optional URL]

Your Fundraising Goal *:
- $0.00

Current Photo:
- [Optional Photo]

My Page Content:
I love tennis and this team is the best. Ever since I joined high school, I wanted to be a part of this team, and now I am! We're trying to raise money so that we can afford to go to our tournaments. Help a girl out by donating or [come with us to the event].

Save
Managing Your Fundraising Page

The drop-down menu in the upper-right corner of the screen allows you to navigate to other pages provided by the organization. You may be able to access information about your own donations, update your personal contact information, or access membership information.

The View My Fundraising Page button in the upper-left corner of the screen opens your live fundraising page in a new browser tab. You can click this any time to see what your fundraising page looks like.

The charts on this page show your fundraising page’s progress toward your fundraising goal, as well as the overall progress towards the campaign’s goal. It also shows you a list of top fundraising pages for this campaign.
You can use the navigation bar below the charts to navigate through the features provided to help your fundraising efforts.

- **Page Content** – Edit the text and images that appear on your fundraising page.
- **Share My Page** – This helps you get the word out to your friends about your fundraising page through social media.
- **Donations** – This is a list of all of the donations that you have received.
- **Event Registrations** – This is a list of all the people who have signed up for a related event and credited you for their sign-up. You'll only use this if your campaign has an event associated with it.
- **Comments** – When your donors make a donation, they can leave a comment. Use this page to hide any comments that you don’t want displayed on your page.
- **Team** – If teams are enabled for this campaign, you can choose to join a team or create your own in this tab.

The **Back to Fundraising Page List** button immediately above the charts will take you back to the Social Fundraising Overview.
If you have more than one fundraising page, they will be listed here. Clicking the Manage Page link takes you back to your fundraising management page. If you click Deactivate, your fundraising page will no longer be visible to the public. Nobody will be able to access your page or make donations. Your data will not be deleted, and you can easily re-activate the page from this screen.

Social Fundraising Overview

Total: 1 fundraising pages.

Add a fundraising page for a campaign:

CREATE PAGE

Social fundraising pages:

<table>
<thead>
<tr>
<th>Campaign Name</th>
<th>Contribution Total</th>
<th>Goal</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>An Example Campaign</td>
<td>$50.00</td>
<td>$500.00</td>
<td>Manage Page</td>
</tr>
</tbody>
</table>
Page Content Tab

It’s a good idea to specify a fundraising goal. This goal will show up on your fundraising page. You’ll see a progress bar that shows you your progress.

You should also upload a personal photo. This will appear on both your fundraising page and the fundraiser listing page (All Fundraisers).

Adding personal content is a great way to tell your supporters about your fundraising efforts. Use this content editor, which works similarly to Microsoft Word, to add text and images to your fundraising page. Be sure to click Save to save your changes.
Share My Page Tab

The Share My Page tab gives you tools for sharing your fundraising page with your personal networks. You can copy and paste the direct link for use on web pages and sharing through emails.

Use the Social Media links to use your existing social media accounts to share your fundraising page with your personal networks.

My Fundraising Page

Share your fundraising page by copying this direct link.

Donation Link: https://uat.z2systems.com/np/clients/test/campaign.jsp?campaign=60&fundraiser=71200&team=2400

Social Media

Use these links to share your page with your personal network.
Donations Tab
The **Donations** tab displays a list of all donations that have been credited to you. This includes the name of the donor, the donation amount, the date they donated, and any comments they left. These donations may have either come through your donation page or have been added manually by a staff member of the organization for which you are fundraising.

Click the **Export to CSV** button to export this list to a .CSV file. You can open this file in a spreadsheet program such as Microsoft Excel.

Event Registrations Tab
The **Event Registrations** tab displays a list of all event registrations that have been credited to you. You will only see data on this page if the organization for which you are fundraising has created a corresponding event for your campaign. It is entirely possible that you will see nothing here.
Comments Tab
The Comments Tab allows you to manage the comments on your fundraising page. You can turn comments completely off by clicking the large On/Off button. This does not delete any existing comments, nor does it prevent people from adding new comments when they donate. It merely prevents them from displaying on your page. You will still be able to see all comments on this page.

You can also hide individual comments by clicking the Hide button next to the specific comment.

Team Tab
If you would like to fundraise as part of a group, you can join a team in this tab. Your options are:

- **No thanks, I'm fundraising on my own** – This will keep you unaffiliated from any team.
- **Yes, and I'm team captain** – This will prompt you to create a team page with its own title and content separate from your individual page.
- **I'd like to join a team.** – This will list all other teams currently available for you to join.

If you are team captain, you are in charge of adding content to your team page. Be sure to add a compelling story that inspires others to give to your campaign. Team pages themselves do not accept donations. Instead, visitors will be encouraged to donate to you and your teammates’ individual pages.
Team
Manage your team's fundraising page.

Are you part of a team:
- No thanks, I'm fundraising on my own.
- Yes, and I'm team captain.
- I'd like to join a team, Select a Team...

Team Page Title:
- Guy Neal's Fundraising Team

Team Page Url:
- https://test.z2systems.com/campaignTeam.jsp?campaignId=71&teamId=16
- https://test.z2systems.com/

Your Team Goal *:
$0.00

Current Photo:
Upload a personal photo to your Team page.

(No Photo)
Select File No file chosen

Upload

Team Page Content

Save