

# Social Fundraising for Fundraisers

A fundraiser's reference for using Social Fundraising in NeonCRM by Z2 Systems, Inc.

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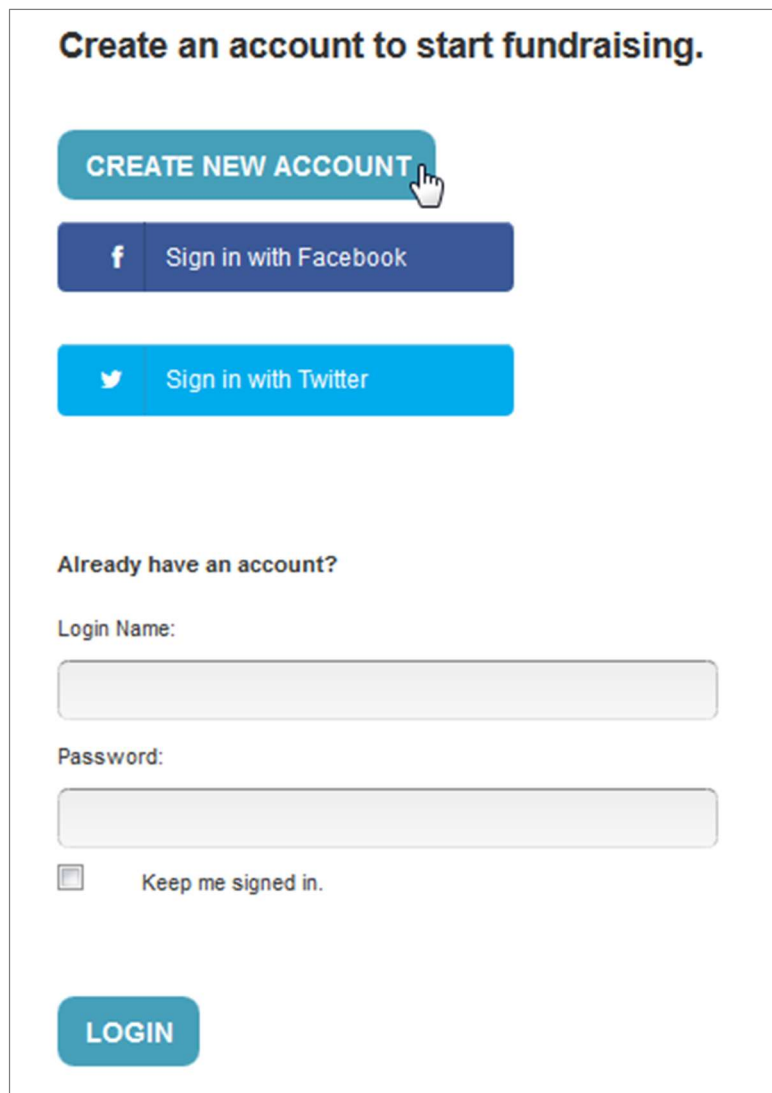
For the purposes of this guide, we assume that you have been given a link to an existing Social Fundraising page, or you have received an email asking you to create a fundraising page. If you need help getting to an account creation page, please contact the organization for which you are fundraising.

## 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**.



The screenshot shows a web form for creating a new account. At the top, the heading "Create an account to start fundraising." is displayed. Below this, there are three main buttons: a teal "CREATE NEW ACCOUNT" button with a hand cursor icon, a dark blue "Sign in with Facebook" button with the Facebook 'f' logo, and a light blue "Sign in with Twitter" button with the Twitter bird logo. Further down, the text "Already have an account?" is followed by a "Login Name:" label and an empty text input field. Below that is a "Password:" label and another empty text input field. A checkbox labeled "Keep me signed in." is positioned below the password field. At the bottom left, there is a teal "LOGIN" button.

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.

## Create Fundraiser Account

\*First Name:

Jennifer

\*Last Name:

Test

\*Email:

jennytest@test.net

\*Login Name:



jennytest

\*Login Password:

●●●●●●●●

\*Retype Password:

●●●●●●●●



19 54986325

Privacy & Terms

SUBMIT

3

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>

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.*

## Account Login

Login Name:

Password:

☐ Keep me signed in

for 2 weeks unless I sign out.

[ Uncheck if on a shared computer. ]

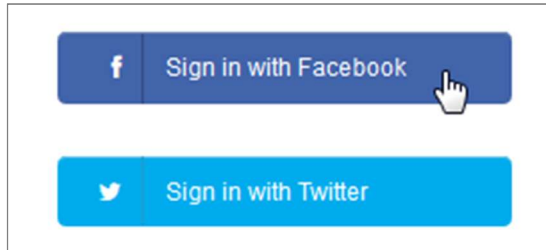
**LOG IN**

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.

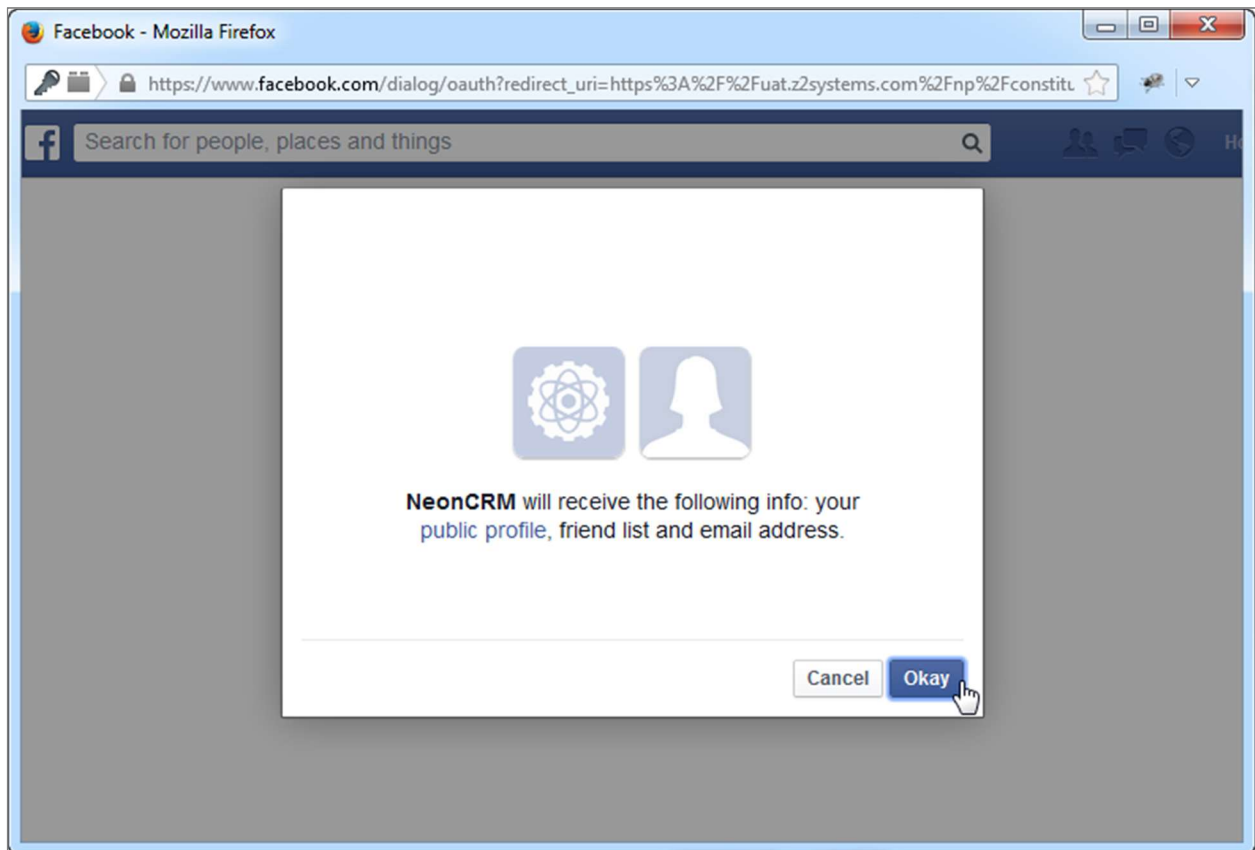


A pop-up window will appear. Ensure that your web browser is not blocking pop-ups on this page.

Enter your Facebook user name and password. Click **Log In**.



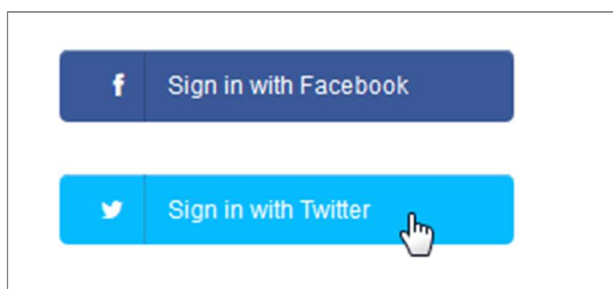
Click **Okay** on the next page.



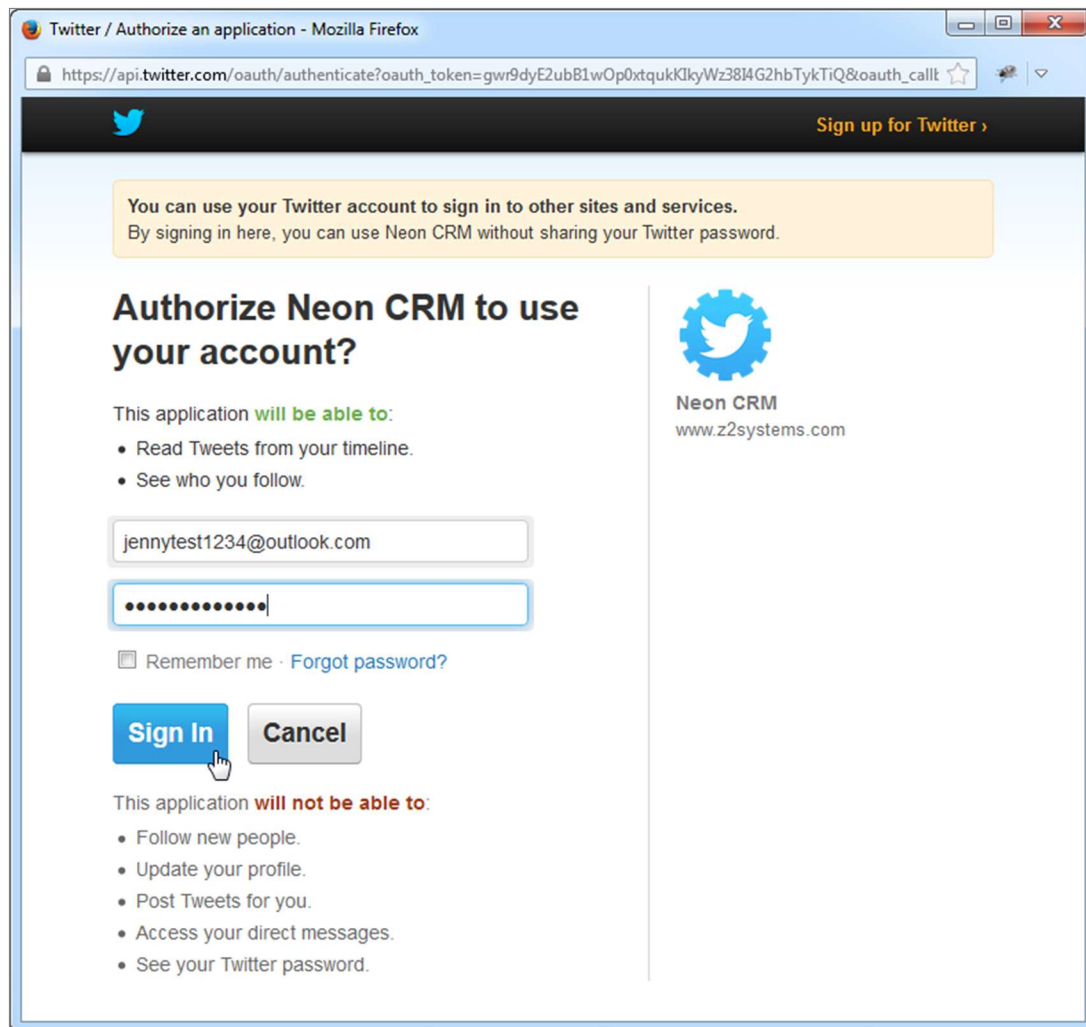
Once you have logged in, you will be taken to the Social Fundraising Overview page.

## 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**.

Welcome Jennifer Test (Account# 66199)

What would you like to do? 


GO


### Social Fundraising Overview

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You do not have any fundraising pages.

Add a fundraising page for a campaign:

An Example Campaign 

CREATE PAGE 



This creates a new fundraising page and brings you to your management page.

**Your Fundraising Page For:**

**View My Fundraising Page**

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### YOUR PAGE

**\$231**  
RAISED

GOAL \$1,000

### CAMPAIGN CONTRIBUTIONS

**\$4,853**  
RAISED

GOAL \$1,000,000

### TOP FUNDRAISERS

|                   |       |
|-------------------|-------|
| 1. Guy Neal       | \$788 |
| 2. Mister X Donut | \$20  |
| 3. Adgb Aefb      | \$0   |

---

Page Content | Share My Page | Donations | Event Registrations | Comments | Team

---

## Page Content

Manage your personal fundraising page.

Fundraising Page Title:  
☒ Guy Neal's Fundraising Page  
☐ \_\_\_\_\_

Fundraising Page Url:  
☒ https://test.z2systems.com/campaign.jsp?campaign=71&fundraiser=124718&  
☐ https://test.z2systems.com/\_\_\_\_\_

Your Fundraising Goal \*:

Current Photo:  
 Upload a personal photo to your fundraising page.  
 (No Photo)  No file chosen

---

My Page Content:

Source

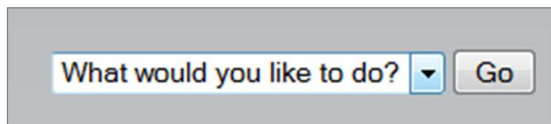
I love tennis and this team is the best. Ever since I joined high school, I wanted to be a part of this team, and now I am! We're trying to raise money so that we can afford to go to our tournaments. Help a girl out by donating or [come with us to the event](#).

body p

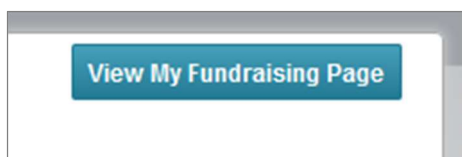
Save

## Managing Your Fundraising Page

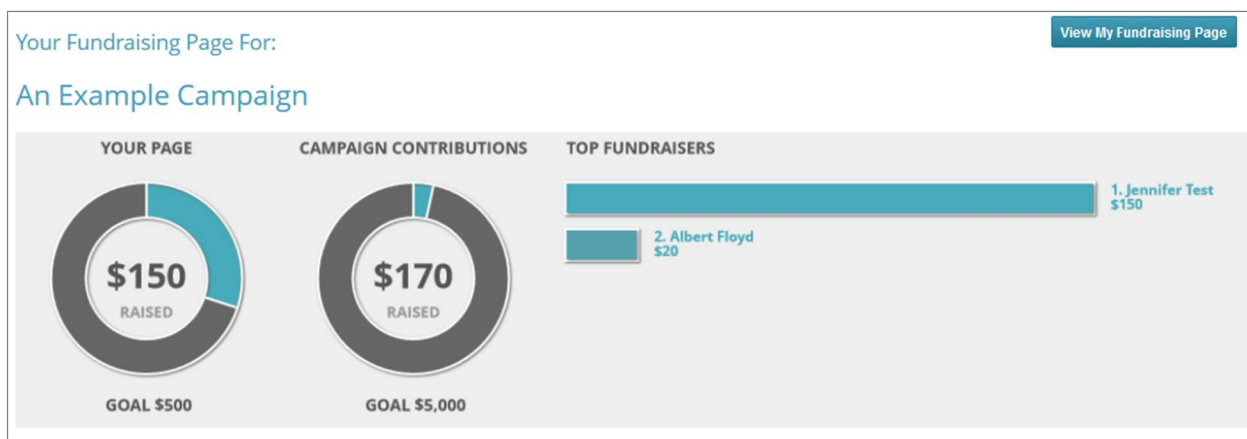
The drop-down menu in the upper-right corner of the screen allows you to navigate to other pages provided by the organization. You may be able to access information about your own donations, update your personal contact information, or access membership information.



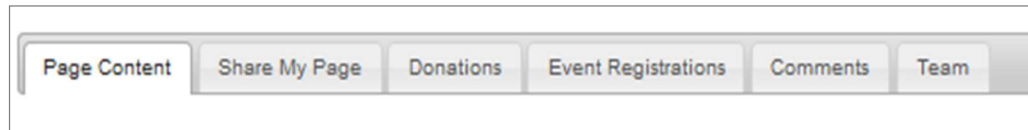
The **View My Fundraising Page** button in the upper-left corner of the screen opens your live fundraising page in a new browser tab. You can click this any time to see what your fundraising page looks like.



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.

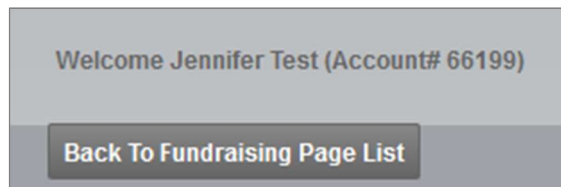


You can use the navigation bar below the charts to navigate through the features provided to help your fundraising efforts.




- **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.

Welcome Jennifer Test (Account# 66199)

What would you like to do? 

GO

## Social Fundraising Overview

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Total: 1 fundraising pages.

Add a fundraising page for a campaign:

CREATE PAGE

**Social fundraising pages:**

| Campaign Name       | Contribution Total | Goal     | Actions  |
|---------------------|--------------------|----------|--|
| An Example Campaign | \$50.00            | \$500.00 | <a href="#">Manage Page</a>   <a href="#">Deactivate</a> |

## 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).


### Page Content

Manage your personal fundraising page.

Your Fundraising Goal \*:

\$ 500.00

Current Photo:



Upload a personal photo to your fundraising page.

Select File No file choosen


Upload

[Delete](#)

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.

### My Page Content

Source



Thanks for supporting my fundraising campaign!

body p

Save

## 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=240&>

### 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.

### Manage Donations

View donations, export them to CSV, or hide them from displaying on your fundraising page.

Export to CSV

| Donation List |          |            |            |
|---------------|----------|------------|------------|
| Donor         | Amount   | Date       | Comments   |
| Jennifer Test | \$100.00 | 11/04/2013 |            |
| Jim Bob       | \$50.00  | 11/04/2013 | Way to go! |

View 1 - 2 of 2

## 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.

**Comments**

Turn the comments section of your fundraising page on or off. If you turn comments off, they will be saved but not visible to the public.

**ON**

---

**Manage Comments**

| Donation Comment List |            |            |        |
|-----------------------|------------|------------|--------|
| Donor                 | Comment    | Date       | Action |
| Jim Bob               | Way to go! | 11/04/2013 | Hide   |

View 1 - 1 of 1

Bulk actions ▼ Apply

## 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.



