

**JULY 10-26**



# FUNDRAISING USER GUIDE

HOW TO USE DONORDRIVE'S FUNDRAISER PORTAL TO BE A SUCCESSFUL FUNDRAISER

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# TIPS FOR SUCCESS



**Donate to yourself.** This sets the tone and shows that you are committed.



**Customize your fundraising page.** Upload an account picture, tell your story, and upload photos – all from your fundraising page.



**Start asking right away.** The earlier you begin, the more you will raise. Use the email tool to send and track messages.



**Share your page on social media.** Take advantage of the sharing power of social media to help you reach more people. Make sure to include the link to your fundraising page.



**Say Thank You.** When a friend or family member supports you, send a thank you note right from your fundraising page.

# REGISTRATION

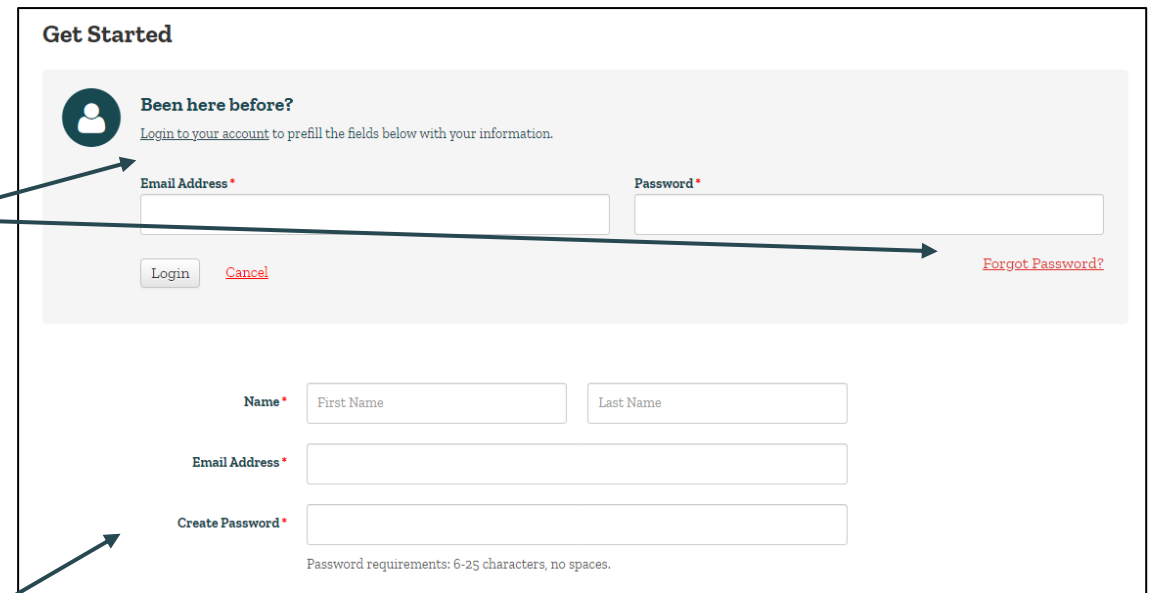
Click the "Register Now!" button, on the homepage, to start your registration. All Participants must register.

**Returning Participants:** If you participated in Summer Bowl for Kids' Sake in or after 2023, you do not need to create a new account.

Click "Login to your account", on the registration page, to log in with last year's credentials. Click the "Forgot Password?" link if you need to reset your password.

Logging in will pre-fill the fields, with your information, and give you access to data from previous events/years.

**New Participants:** If this is your first time participating in Summer Bowl for Kid's Sake, or you participated prior to 2023, please create an account by adding your name and email address and creating a password..



The screenshot shows a 'Get Started' page with two main sections. The top section, titled 'Been here before?', includes a user icon, a link to 'Login to your account', and input fields for 'Email Address' and 'Password'. Below these are 'Login' and 'Cancel' buttons, and a 'Forgot Password?' link. The bottom section is for new users, with fields for 'Name' (split into 'First Name' and 'Last Name'), 'Email Address', and 'Create Password'. A note specifies password requirements: 6-25 characters, no spaces. Two arrows from the text on the left point to the 'Login to your account' link and the 'Create Password' field.

**Get Started**

**Been here before?**  
[Login to your account](#) to prefill the fields below with your information.

Email Address \* Password \*

Login Cancel [Forgot Password?](#)

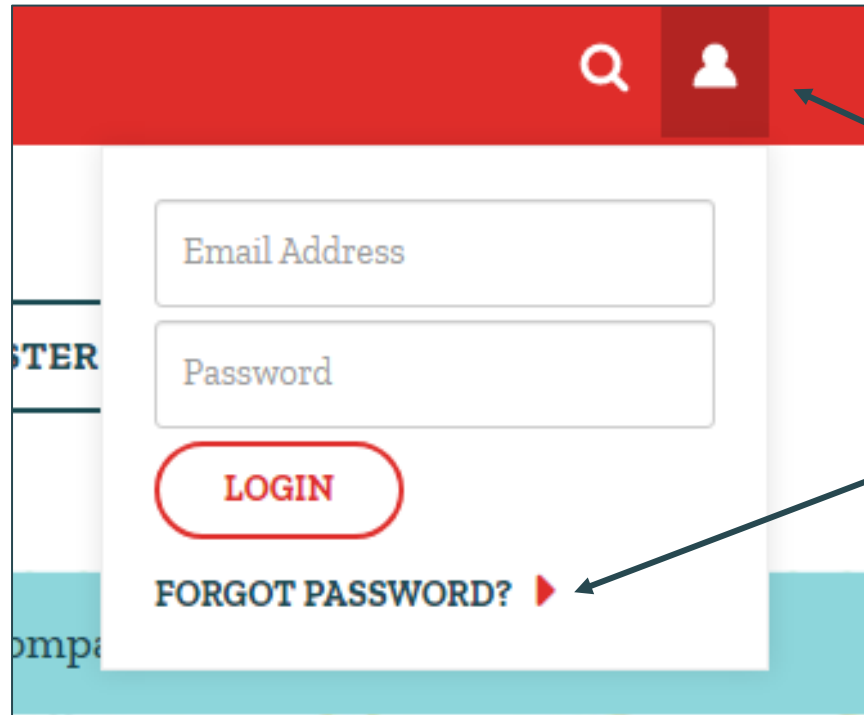
**Name \*** First Name Last Name

Email Address \*

Create Password \*

Password requirements: 6-25 characters, no spaces.

# YOUR FUNDRAISING ACCOUNT



A screenshot of a fundraising account login page. The page has a red header bar containing a magnifying glass icon and a person icon. Below the header, there are two input fields labeled "Email Address" and "Password". A red "LOGIN" button is positioned below the password field. At the bottom of the login form, there is a link that says "FORGOT PASSWORD?" followed by a red right-pointing triangle. Two arrows point from text blocks on the right to the person icon and the "FORGOT PASSWORD?" link.

Once you've registered, you can log in and personalize your fundraising page, send emails to friends, spread the word on social media, and track donations made toward your fundraising goal.

**Log in** by clicking the person icon at the top of the homepage. Enter the email address and password, you used when you registered for the event, or that was set up for you.

**Forgot your password?** Click the Forgot Password link to reset your password.

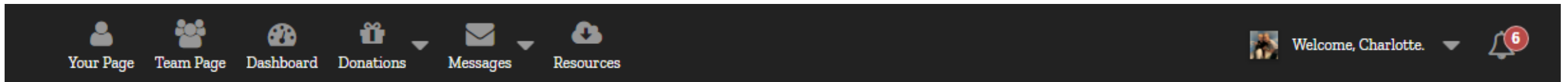
**Note:** the link you receive to reset your password can only be clicked once. You can get another link by clicking Forgot Password again. Every time the Forgot Password email is sent, the prior link becomes inactive.

# YOUR FUNDRAISING TOOLBAR

When logged into your Fundraiser Portal, the Fundraiser Toolbar will appear at the top of the page and will stay in place as you navigate through the site. This way, you can easily get back to your fundraising tools at any time.

From this toolbar, you can update your fundraising page, track your fundraising progress, keep track of donations, send out emails, connect to social media, and find helpful fundraising resources.

Click on your name to access your account, see personal donations you've made, and manage your communication settings.



Click the bell icon to access announcements and notifications, such as new donations, teammates, and milestones.

# YOUR FUNDRAISING PAGE

Upload a photo of yourself

The screenshot shows a fundraising profile for Jemma Jackson. At the top, there's a navigation bar with icons for 'Your Page' (circled in red), 'Team Page', 'Dashboard', 'Donations', 'Messages', and 'Resources'. The profile section includes a circular profile picture placeholder with a pencil icon, the name 'Jemma Jackson' with a pencil icon, and a 'SUPPORT ME' button. Below this is a progress bar showing '\$50 RAISED' and 'GOAL \$250'. To the right of the goal is a pencil icon and text: 'Add milestones to celebrate progress on the way toward your fundraising goal!' and 'Add a Milestone >'. The page is divided into two main sections: 'My Badges' and 'Incentives'. 'My Badges' has a question mark icon and text: 'Help me get my first badge!' and 'What Are Badges? >'. 'Incentives' shows a reward: '\$50 10 Left Half Dozen Cookies'. At the bottom, there's a tabbed interface with 'My Story' (selected), 'Donations', and 'Settings'. The 'My Story' tab shows the title 'Help Me Support Big Brothers Big Sisters!' and a pencil icon. The story text begins: 'I'm excited to be participating in this year's Summer Bowl for Kids' Sake event, that benefits Big Brothers Big Sisters Kansas City (BBBSKC)! BBBSKC focuses on'.

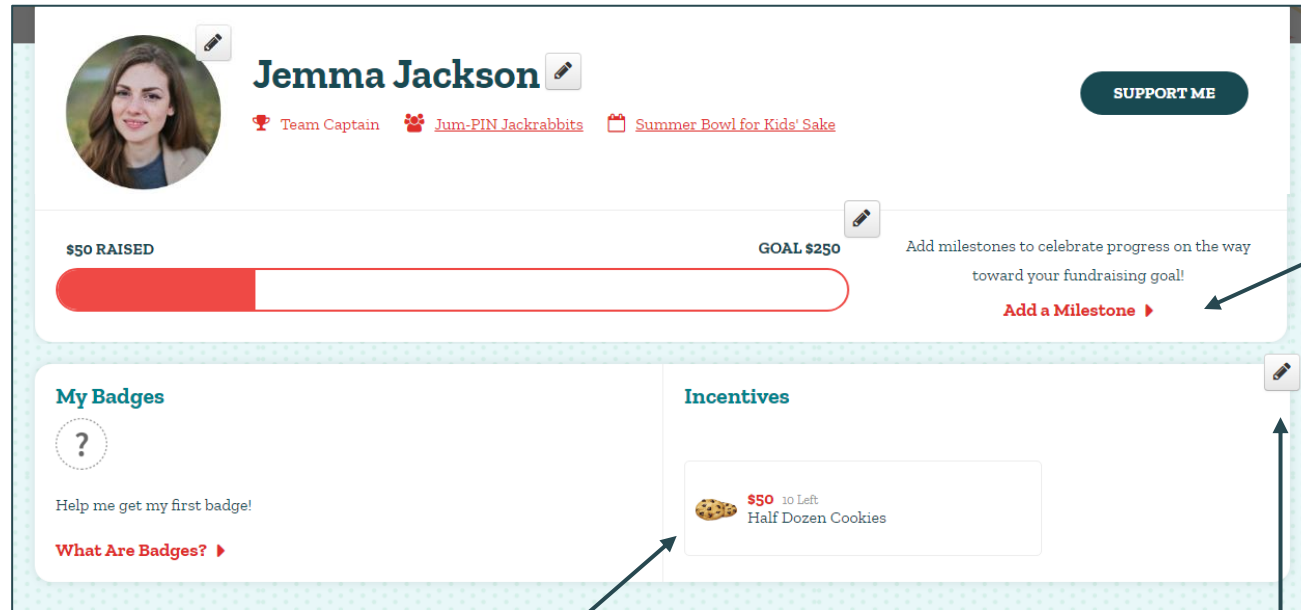
You can edit Your Page wherever you see a pencil icon.

Increase your fundraising goal

Tell your story, upload photos, and share videos.

Use your personal fundraising page to answer the question, "Why do you support Big Brothers Big Sisters?"

# YOUR FUNDRAISING PAGE



**Milestones** are mini goals along the way to your overall fundraising goal.

Click "Add a Milestone" to create your own milestones or edit existing milestones.

Tie your goals to specific actions or challenges to keep supporters engaged. For example: "When I raise \$250, I'll shave my head."

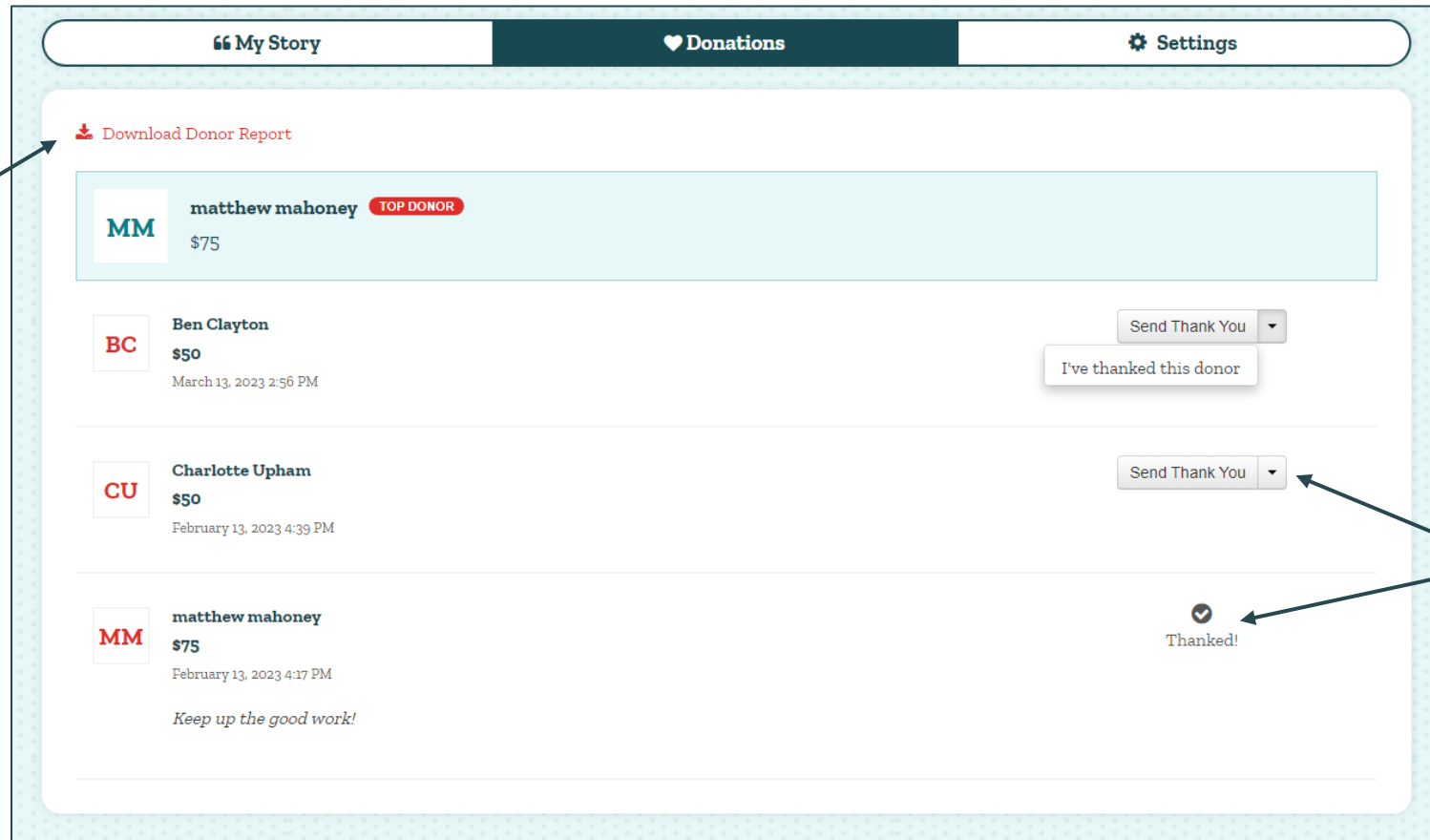
**Incentives** are small actions you'll take that are tied to specific donation amounts. For example: baking cookies for anyone who donates \$50.

Click here to add an incentive. Include the donation amount, a description, and photo. Select the number of times the incentive can be redeemed, add a start/end date (if desired), and add any additional information that you need from your donors (i.e. food allergies, sizes, shipping address, etc.).



# YOUR FUNDRAISING PAGE

Click the "Donations" tab to see all the donations you've received.



Download a report of your donors. If you created an incentive requiring additional donor information, that information will be reflected in the report.

Quickly thank your donors by sending a Thank You message or mark them as thanked if you've already thanked them.

# YOUR FUNDRAISING PAGE

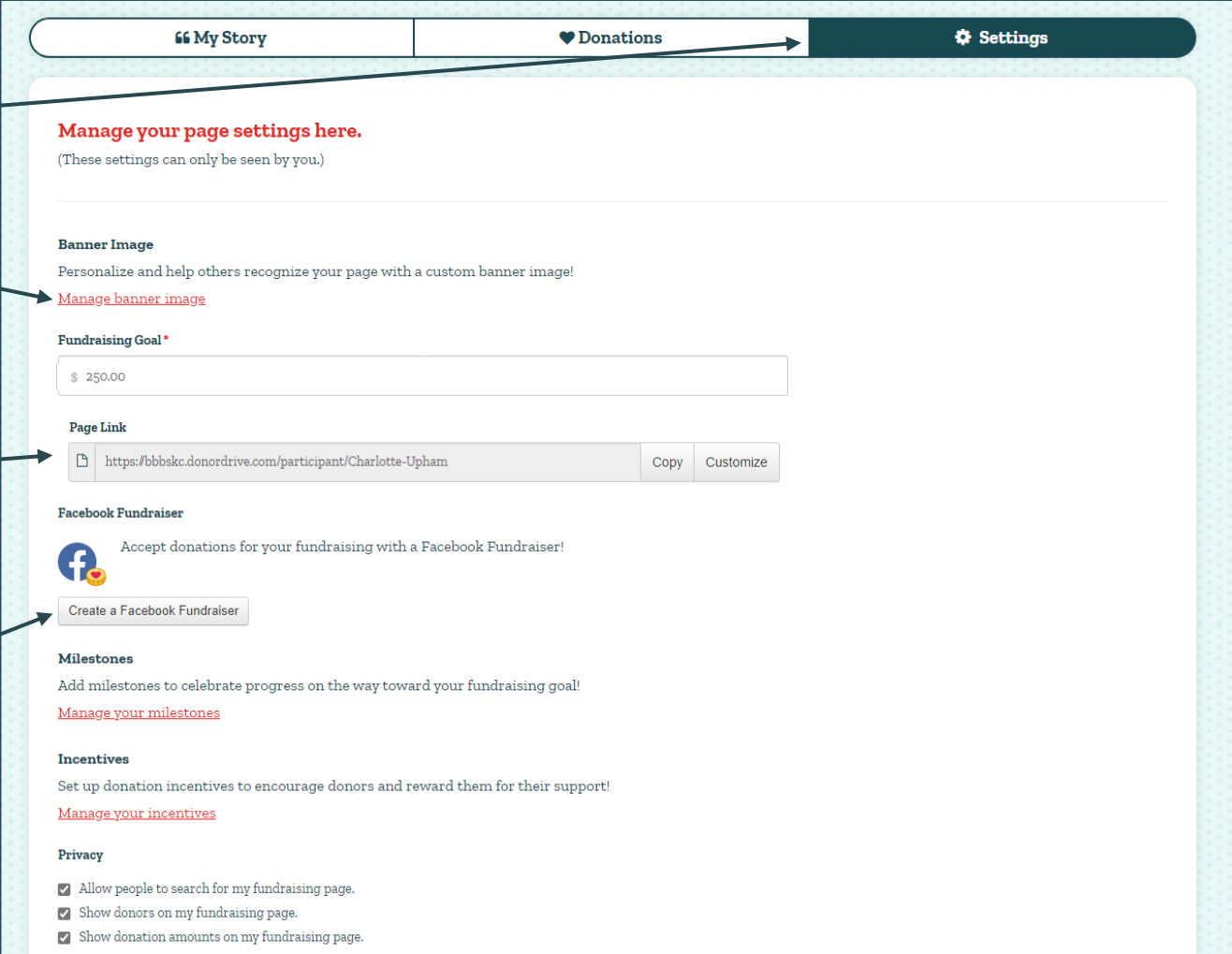
Use the "Settings" tab to manage your page settings.

Add a custom banner image at the top of your fundraising page.

Copy your personal fundraising page link to paste into an email, text, or social media post to ask for donations. You can customize the link with your name.

Create a Facebook Fundraiser that syncs with your Summer Bowl fundraising page.

You can also update milestones and incentives and control privacy settings.




The screenshot shows the 'Settings' tab of a fundraising page. At the top, there are three tabs: 'My Story', 'Donations', and 'Settings'. The 'Settings' tab is active. Below the tabs, there is a section titled 'Manage your page settings here.' with a note '(These settings can only be seen by you.)'. The settings are organized into several sections: 'Banner Image' with a link to 'Manage banner image'; 'Fundraising Goal' with a text input field showing '\$ 250.00'; 'Page Link' with a link 'https://bbbskc.donordrive.com/participant/Charlotte-Upham' and 'Copy' and 'Customize' buttons; 'Facebook Fundraiser' with a Facebook icon, the text 'Accept donations for your fundraising with a Facebook Fundraiser!', and a 'Create a Facebook Fundraiser' button; 'Milestones' with the text 'Add milestones to celebrate progress on the way toward your fundraising goal!' and a link 'Manage your milestones'; 'Incentives' with the text 'Set up donation incentives to encourage donors and reward them for their support!' and a link 'Manage your incentives'; and 'Privacy' with three checkboxes: 'Allow people to search for my fundraising page.', 'Show donors on my fundraising page.', and 'Show donation amounts on my fundraising page.' All three privacy checkboxes are checked. Arrows from the text blocks on the left point to the 'Settings' tab, the 'Manage banner image' link, the 'Page Link' section, the 'Create a Facebook Fundraiser' button, and the 'Privacy' section.


“ My Story    ♥ Donations    ⚙ Settings

**Manage your page settings here.**  
(These settings can only be seen by you.)

**Banner Image**  
Personalize and help others recognize your page with a custom banner image!  
[Manage banner image](#)

**Fundraising Goal \***  
\$ 250.00

**Page Link**  
 <https://bbbskc.donordrive.com/participant/Charlotte-Upham> Copy Customize

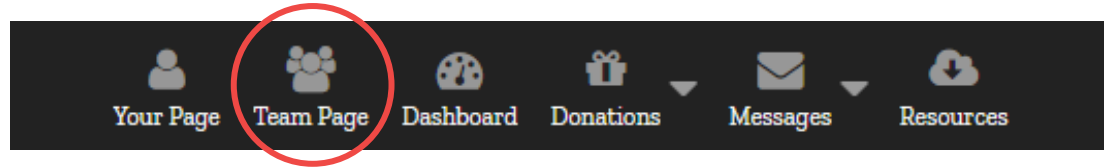
**Facebook Fundraiser**  
 Accept donations for your fundraising with a Facebook Fundraiser!  
Create a Facebook Fundraiser

**Milestones**  
Add milestones to celebrate progress on the way toward your fundraising goal!  
[Manage your milestones](#)

**Incentives**  
Set up donation incentives to encourage donors and reward them for their support!  
[Manage your incentives](#)

**Privacy**  
☒ Allow people to search for my fundraising page.  
☒ Show donors on my fundraising page.  
☒ Show donation amounts on my fundraising page.

# YOUR TEAM PAGE



A screenshot of a team page for 'Jum-PIN Jackrabbits'. At the top left is a circular team photo of a jackrabbit. To its right is the team name 'Jum-PIN Jackrabbits' with an edit icon. Below the name is a calendar icon and the text 'Summer Bowl for Kids' Sake'. To the right of the name are two buttons: 'JOIN OUR TEAM' and 'SUPPORT US'. Below this is a fundraising progress bar showing '\$50 RAISED' and 'GOAL \$1,500' with an edit icon. A horizontal menu below the bar has four items: 'Our Story' (selected), 'Donations', 'Roster', and 'Settings'. Below the menu is a text area with the heading 'Help Us Change Lives in KC!' and the text 'Thank you for visiting our Summer Bowl for Kids' Sake team fundraising webpage!'. An edit icon is to the right of the text area.

**Only Team Captains can make edits to the Team Page. Participants can only view the Team Page.**

← Increase your team fundraising goal.

← Tell your team's story, upload photos, and share videos.

A screenshot of the 'Our Badges' section. It has a title 'Our Badges' and a circular icon with a question mark. Below the icon is the text 'Help us get our first badge!'. At the bottom is a red link that says 'What Are Badges? ►'.

← View your team's Badges. See what Badges your team could qualify for next by clicking "What Are Badges?"

# YOUR TEAM PAGE

The screenshot shows the 'Your Team Page' with the 'Donations' tab selected. The page displays a list of donations from team members. The first donation is from Charlotte Upham for \$100, marked as a 'TOP DONOR'. The second donation is from Ben Clayton for \$50 to You, dated March 13, 2023. The third donation is from Charlotte Upham for \$50 to You, dated February 13, 2023. The fourth donation is from matthew mahoney for \$75 to You, dated February 13, 2023, with a note 'Keep up the good work!'. The page also shows a 'Send Thank You' button for the first three donations and a 'Receipt' button for the last donation.

Donor	Amount	To	Date	Action
Charlotte Upham	\$100	Team	February 13, 2023 4:09 PM	Send Thank You
Ben Clayton	\$50	You	March 13, 2023 2:56 PM	Send Thank You
Charlotte Upham	\$50	You	February 13, 2023 4:39 PM	Send Thank You
matthew mahoney	\$75	You	February 13, 2023 4:17 PM	Receipt

View your team's donations on the "Donations" tab.

See which donors donated to which participants and which donors donated directly to the team.

Team Captains can thank donors in real time.

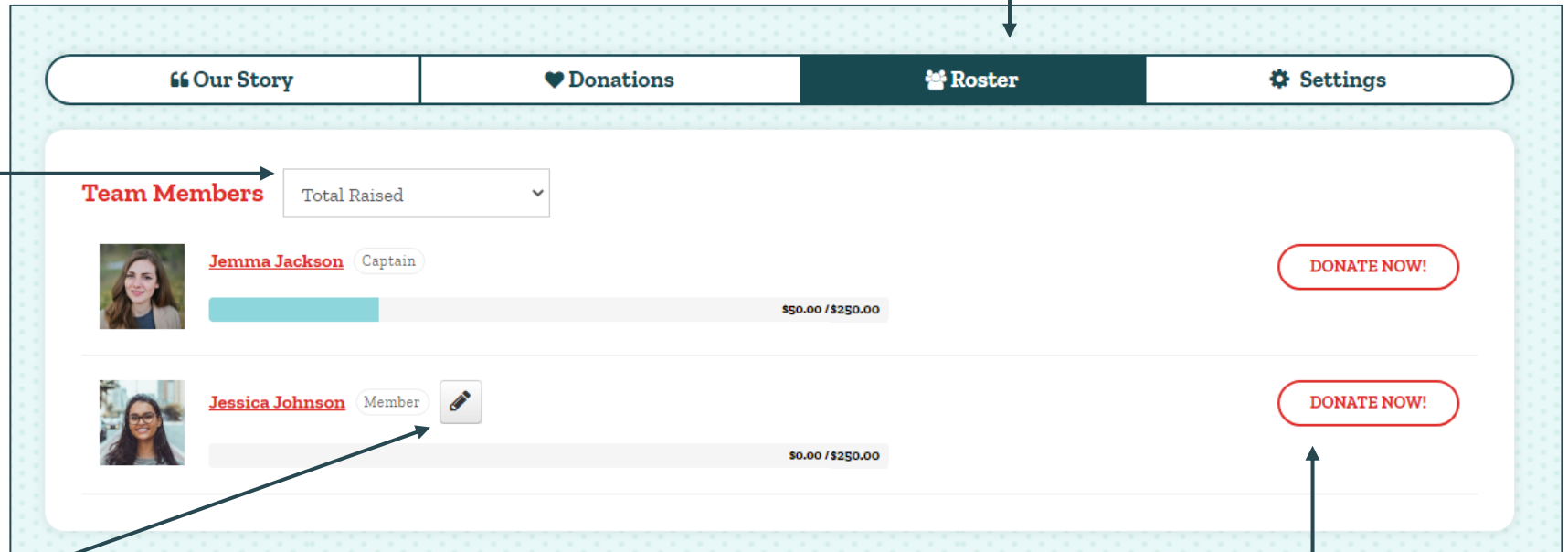
Print receipts for donations you've made yourself.

# YOUR TEAM PAGE

Click the "Roster" tab to see everyone registered on your team.

Sort the list by  
Total Raised,  
Display Name, Role,  
or Recently Joined.

Team Captains can  
change the role of  
their teammates by  
clicking on the  
pencil icon next to  
their name.



Easily make a donation to your teammates by clicking  
the "Donate Now!" button next to their name.

# YOUR TEAM PAGE

Our Story Donations Roster Settings

**Manage your page settings here.**  
(These settings can only be seen by you.)

**Banner Image**  
Personalize and help others recognize your page with a custom banner image!  
[Manage banner image](#)

**Team Fundraising Goal \***  
\$ 1500.00

**Page Link**  
<https://bbbskc.donordrive.com/team/5002> Copy Customize

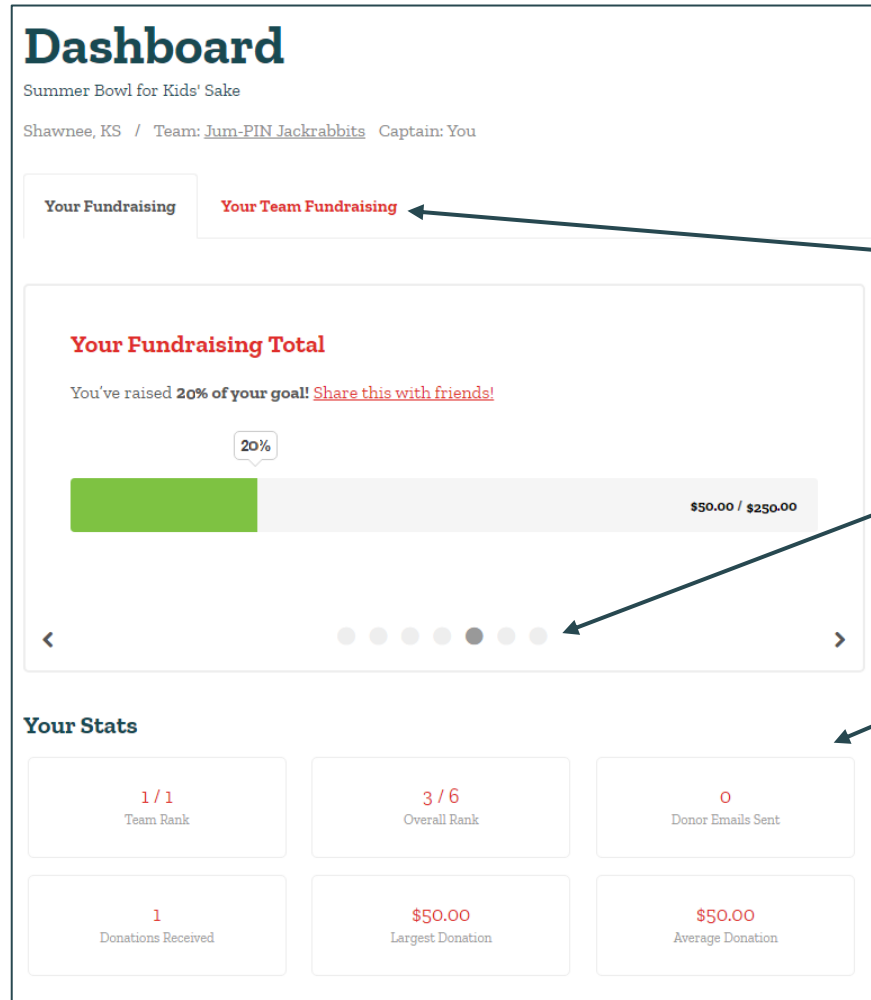
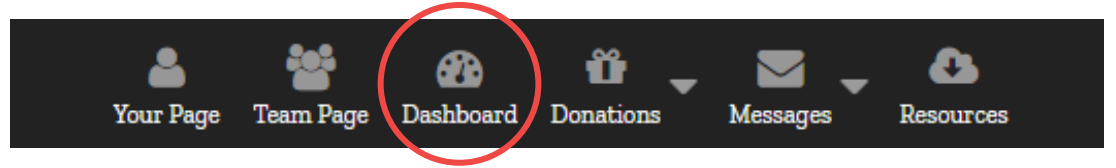
SAVE CHANGES

Team Captains can use the "Settings" tab to manage the team page settings. This tab will not appear for participants.

Add a custom banner image at the top of your team page.

Copy your team fundraising page link to paste into an email, text, or social media post to request teammates or team donations. You can customize the link with your team name.

# YOUR DASHBOARD



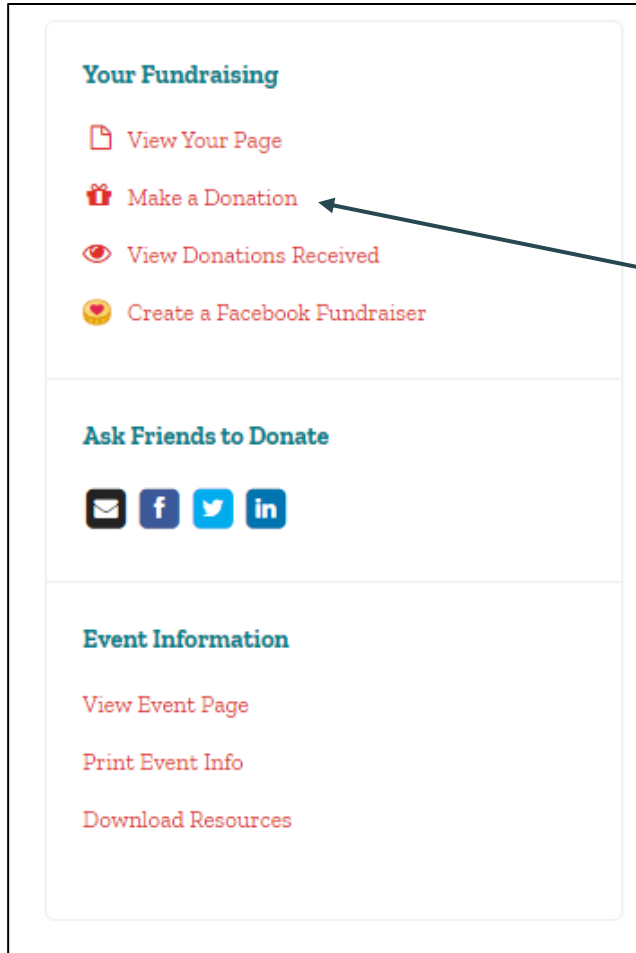
Your Dashboard gives you a snapshot of your fundraising progress and provides helpful next steps.

Click on the "Your Team Fundraising" button to track your team's progress.

Not sure what next steps to take? Scroll through the helpful fundraising prompts. Track your fundraising progress and access your Facebook Fundraiser.

View your personal and team fundraising stats and see where your team ranks on the leaderboard.

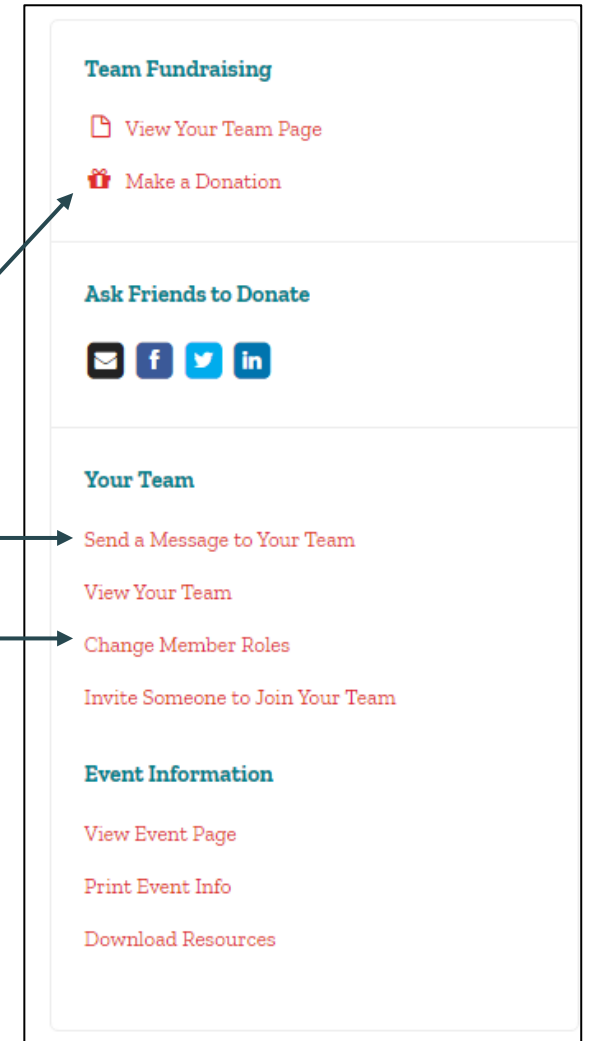
# YOUR DASHBOARD



When viewing your personal and team fundraising progress, you'll see a column on the right with some helpful functions.

View your personal or team fundraising page or make a personal donation.

Captains will have additional functions, such as sending a message to their team, changing team member roles, and inviting others to join their team.



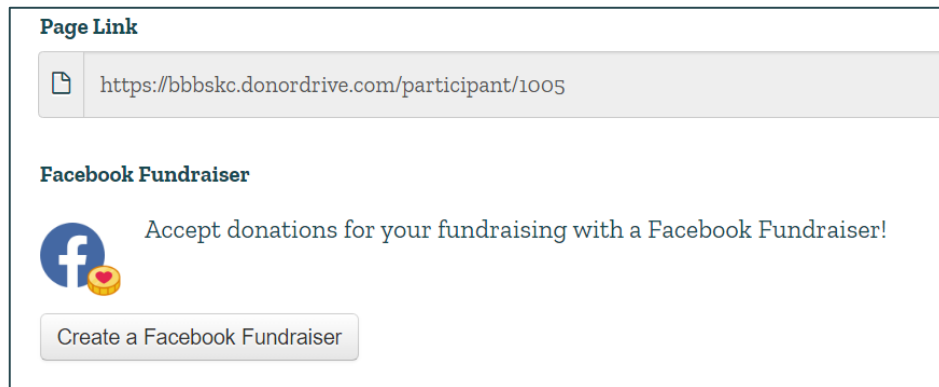


# YOUR DASHBOARD: FACEBOOK FUNDRAISER

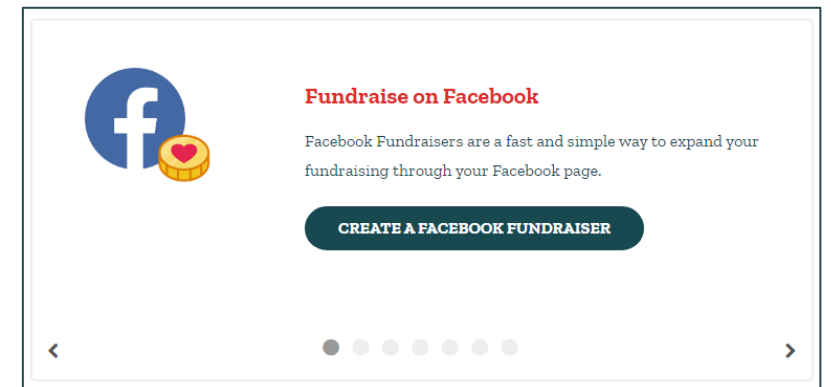
One of the easiest ways to fundraise is to create a **Facebook Fundraiser**! Your Facebook Fundraiser will sync directly with your Summer Bowl fundraising page, allowing you to see Facebook donations on your Summer Bowl fundraising page, and Summer Bowl donations on your Facebook Fundraiser.

**Note:** If you create your Facebook Fundraiser on Facebook, your Facebook Fundraiser will **NOT** sync with your fundraising page.

Your Facebook Fundraiser will pull the text content directly from your personal fundraising page, so make sure your fundraising page is updated with the text you want on Facebook **before** starting your Facebook Fundraiser. It cannot be edited afterwards.



You can start a Facebook Fundraiser from the Settings tab on Your Page or from your Dashboard.



# YOUR DASHBOARD: FACEBOOK FUNDRAISER

Once your Facebook Fundraiser has been created, you can access your fundraiser on your Dashboard, where you can track your fundraiser's progress.

Any Facebook donations received will show up in your list of donations, inside your Fundraiser Portal. Facebook donations will have "Facebook Donor" listed as the donor's name.



Facebook Fundraiser  
\$15.00 (12%)

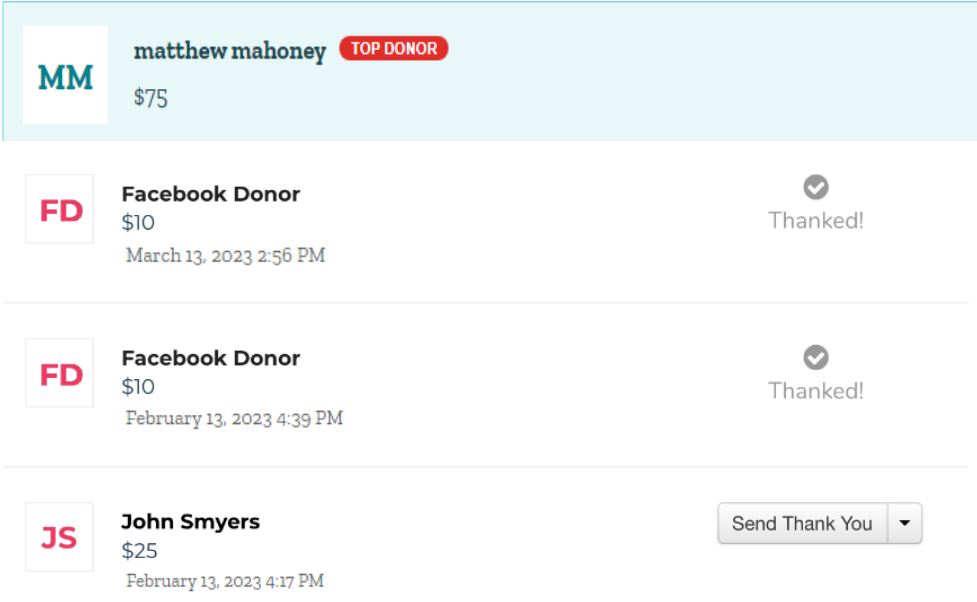
## Your Facebook Fundraiser





\$15 of your \$125 total raised has come from your Facebook Fundraiser!

Facebook Fundraiser

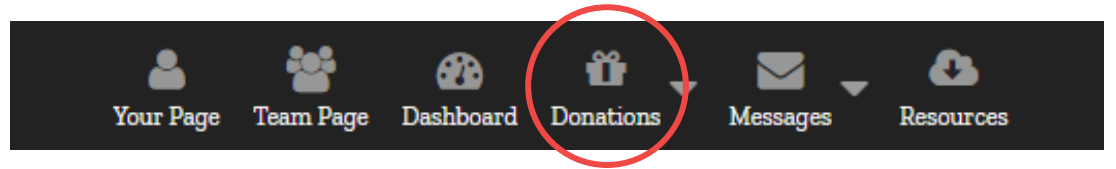
**VIEW FACEBOOK FUNDRAISER**

(Your Fundraiser will end on August 25, 2023 [End Now](#))



	<b>matthew mahoney</b> TOP DONOR \$75	
	<b>Facebook Donor</b> \$10 March 13, 2023 2:56 PM	✓ Thanked!
	<b>Facebook Donor</b> \$10 February 13, 2023 4:39 PM	✓ Thanked!
	<b>John Smyers</b> \$25 February 13, 2023 4:17 PM	Send Thank You ▼

# DONATIONS



## Donations

Summer Bowl for Kids' Sake

Donations Received   [Add Offline Donation](#)   [Make a Donation →](#)

You **\$175**   Your Team **\$100**

[Download Donor Report](#)

You've raised 70% of your goal!

**\$175 Raised**   **\$250 Goal**

  [THANK YOUR DONORS](#)

<b>Ben Clayton</b> Participant Donation	<b>\$50</b> 03/13/2023
<b>Charlotte Upham</b> Participant Donation	<b>\$50</b> 02/13/2023

Here is where you can view who has donated to you and send them thank you emails.

Download your donor report.

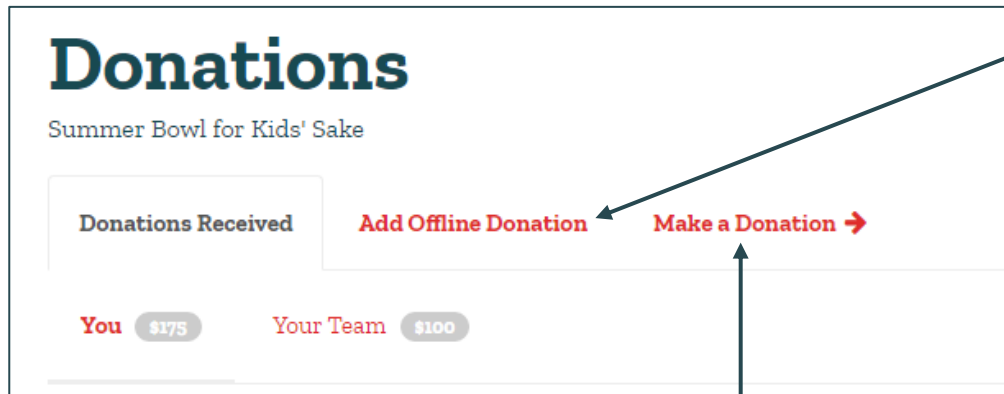
Track your fundraising progress.

Thank your donors.

**Tip:** Click on a donation and a popup window will appear with the donor's email address (unless the donor chose to hide their information).

# DONATIONS

Do you have cash, a check, or a matching gift to add to your page? Add it as an offline donation!



Click the "Add Offline Donation" tab and follow the instructions for adding your offline donation.

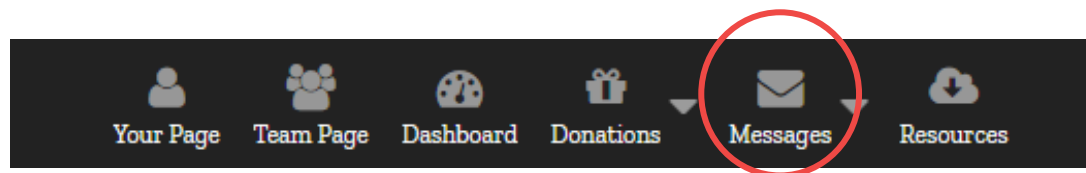
All checks should be made out to "BBBSKC" or "Big Brothers Big Sisters Kansas City" and mailed to our office:

BBBSKC  
Attn: Summer Bowl for Kids' Sake  
1709 Walnut Street  
Kansas City, MO 64108

Donate directly to your fundraising page. This sets the tone for your fundraising and shows that you are committed.

*\*Please include a note/memo with your name and team name so we know who to attribute the donation to, when it arrives.*

# MESSAGES



## Messages

Summer Bowl for Kids' Sake

[Sent Messages](#)[Compose a Message](#)[Drafts](#)[Contact List](#)

### Support Charlotte in the Summer Bowl for Kids' Sake event

✓ Sent On: 02/13/2023 3:15 PM

1	0	\$0.00
Recipients	Donated	Raised

CopyResend to those who haven't donated

### Sent Message Totals

1	Recipients
0	Donated
\$0.00	Raised

Use your Messages center to send emails. Compose a message, see which emails you've sent, access saved email drafts, and upload your contacts.

Track which donations you've received, through your email efforts, and follow up with people who haven't donated yet.

# MESSAGES

## Recipients

Select recipients from your contact list, donors who have supported you in the past, or donors who have already donated to you this year.

## Message Type

Choose an email template to invite friends and family to donate, join a team, or send a general fundraising update. Team Captains can also send and update to their team.

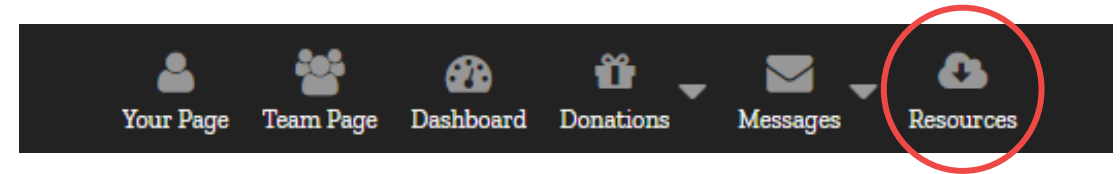
## Message

Update the message content, add links and pictures, and format your message. **A link to your fundraising page will automatically be included.** You can save the message as a draft or even send a test message to yourself!

The screenshot shows the 'Compose a Message' interface with the following elements:

- Navigation Bar:** Sent Messages, Compose a Message, Drafts, and Contact List.
- Step 1:** A dropdown menu titled 'Choose a message type \*' with options: Ask a Friend to Donate, Fundraising Update, Ask a Friend to Join, Team Update, and Ask a Friend to Donate to Your Team. Below the dropdown are buttons for 'Select from Contacts', 'Import from Webmail', and 'or CSV'.
- Step 2:** A light blue note box stating: 'Please note: you may separate email addresses by comma, semicolon, or one address per line. Messages can be sent to a maximum of 100 recipients. This limit helps your message get delivered.'
- Step 3:** A text input field for 'Subject \*' containing the text 'Support Charlotte in the Summer Bowl for Kids' Sake event'.
- Step 4:** A rich text editor for 'Message \*' with a toolbar showing options for paragraph, bold, italic, list, and link.

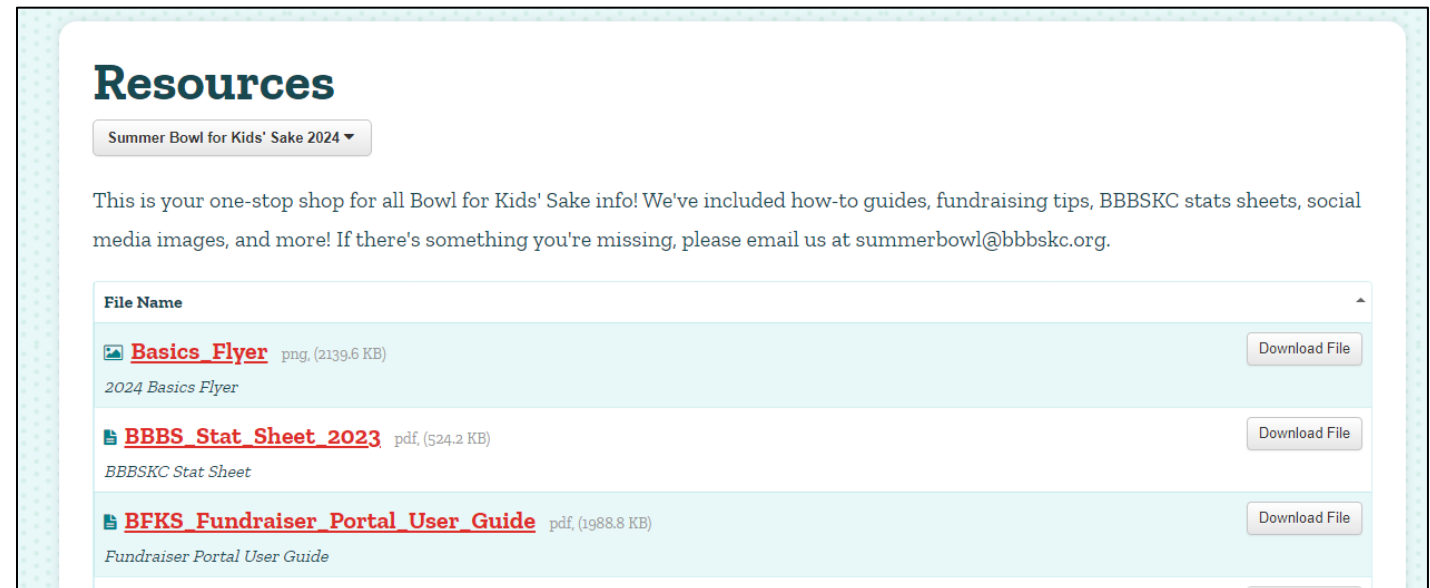
# RESOURCES



The Summer Bowl website has lots of helpful fundraising tools, flyers, and resources. This information can also be found in one central location - the Resources center of your Fundraiser Portal.

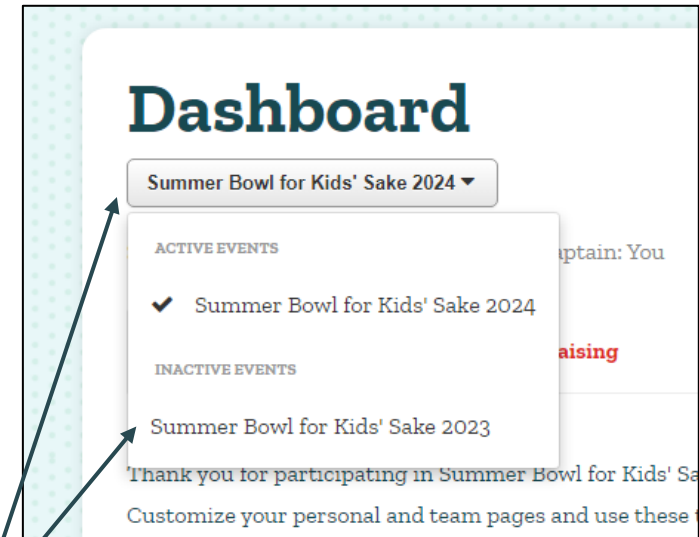
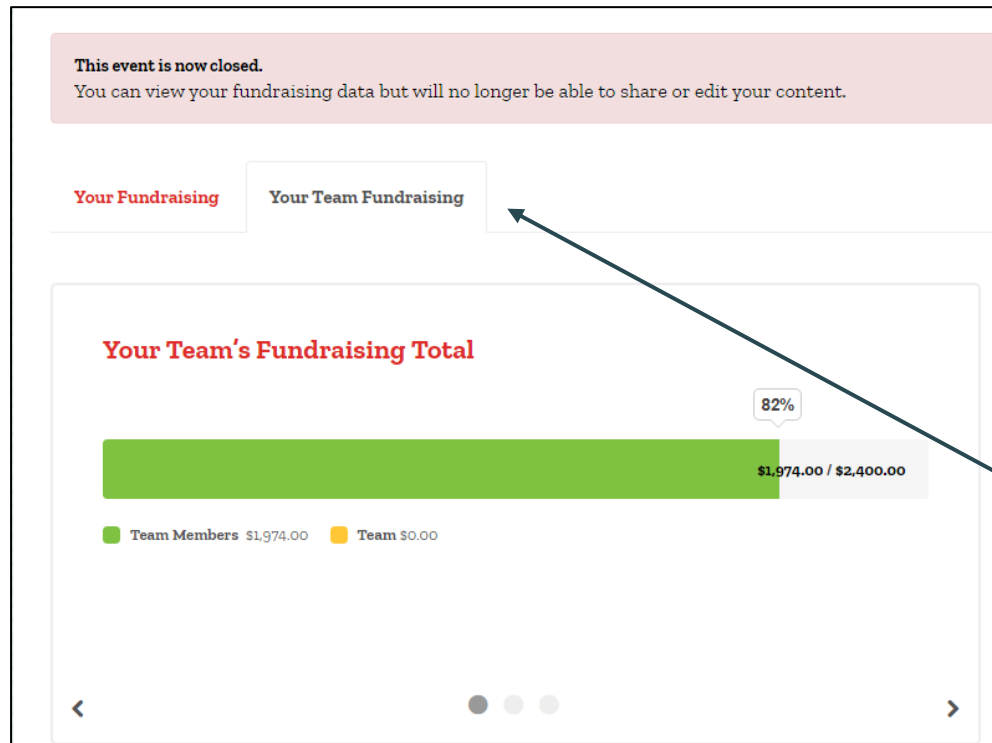
Here, you can find:

- Summer Bowl Steps
- BBBSKC Stats Sheet
- Fundraising Tips
- Fundraising Prizes
- Pre-Party Flyer
- Mobile App Guide
- And more!



# RETURNING PARTICIPANTS

If you participated in Summer Bowl for Kids' Sake in 2023 or later, and you logged in with last year's credentials, you will have access to your historical data.

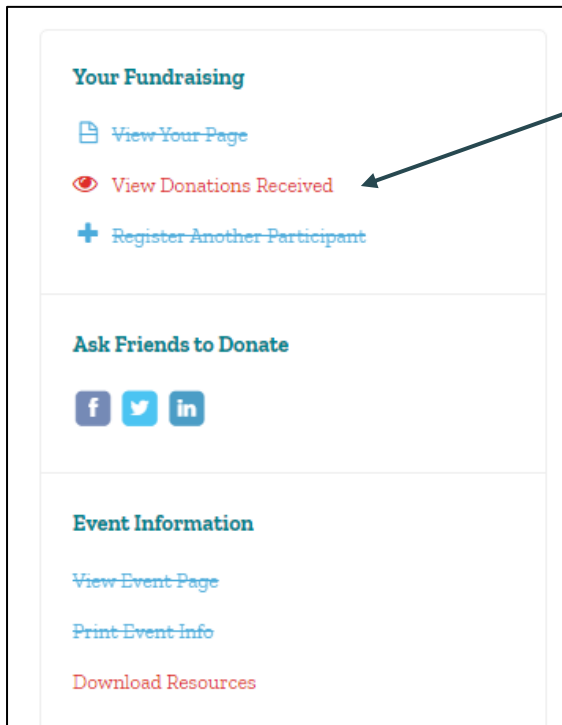


To access this data, go to your Dashboard. You will see a button with the event name. Click on the button to see a list of previous, inactive events.

After selecting an inactive event, you will be able to see your personal and team fundraising statistics, along with your team roster and overall event ranking.



# RETURNING PARTICIPANTS

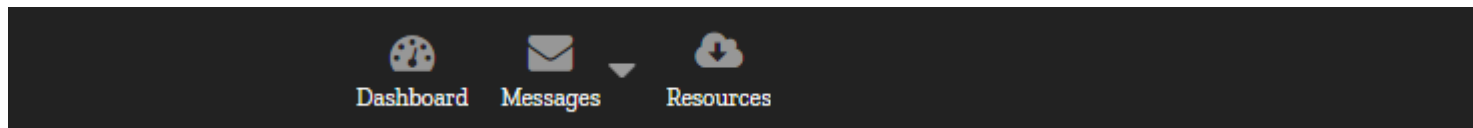
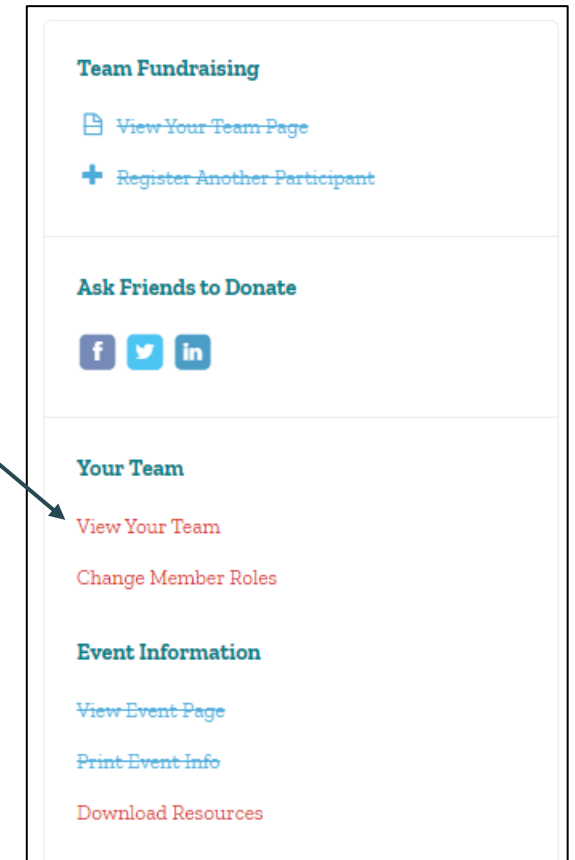


To view your donations, click on "View Donations Received" in the right-hand column. From the Donations page you can also download a donor report.

You can view your team roster, here.

From your Fundraiser Toolbar, you can access your sent messages, list of contacts, and your fundraising resources.

**Don't forget to switch back to this year's event, to manage and track your current fundraising!**



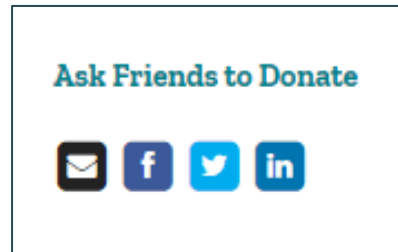
# SHARE ON SOCIAL NETWORKS

Use these social media tools to share with friends and family and keep followers updated on your progress.

Ways to Share:

- Facebook
- Twitter
- LinkedIn
- Text Message (mobile devices only)

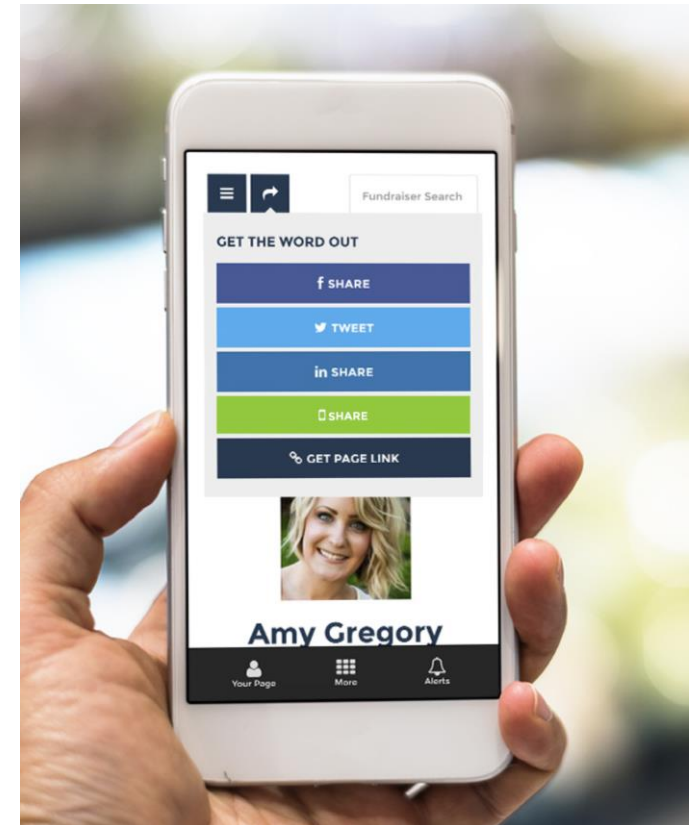
Share from your Dashboard:



Share from the bottom of Your Page and Team Page:

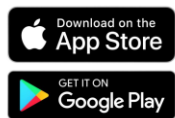
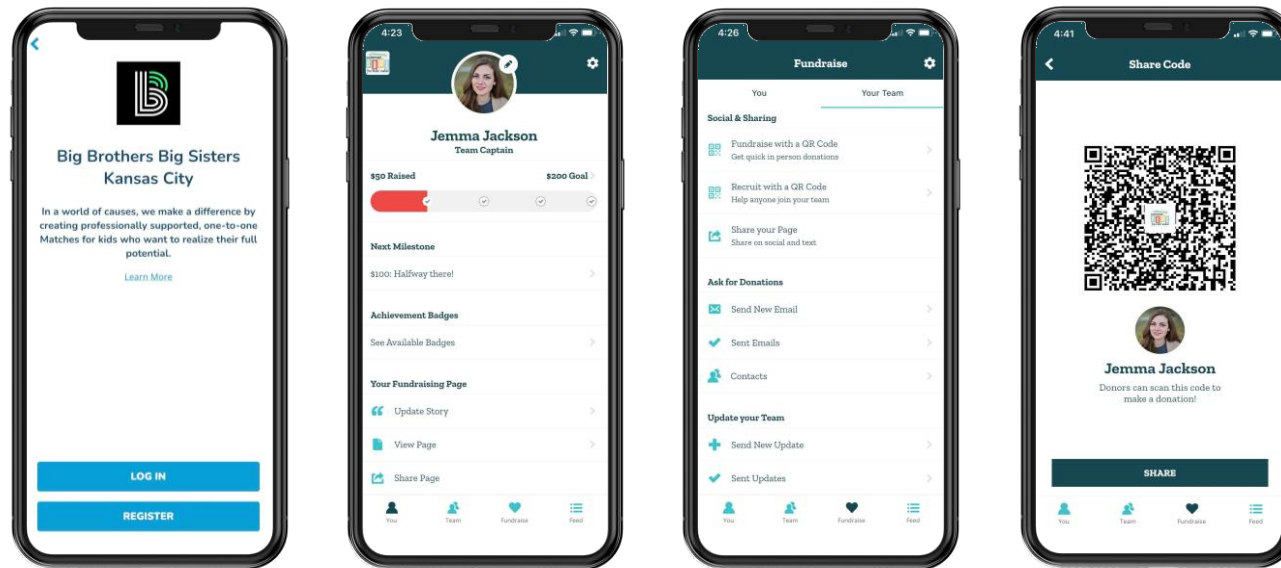


A link to your fundraising page will be included in your post.



# GET THE MOBILE APP

Update your fundraising story, track your progress, display your personal QR code, and raise money for Big Brothers Big Sisters – all on the go!



From the home screen of your mobile device, tap the App Store or Google Play Store icon and type "DonorDrive" into the search bar. For iPhones, tap "Get" next to the DonorDrive Charity Fundraising app and install. For Androids, tap on the thumbnail and install.

**Once installed on your device, tap "Get Started" and search for "Big Brothers Big Sisters Kansas City." Log in with the same username and password as your Fundraising Account. That's it!**