KIDNEY WALK PARTICIPANT CENTRE GUIDE

WHAT DO YOU WANT TO DO?

LOGIN & EXPLORE

LOGIN TO THE PARTICIPANT CENTRE

Congratulations on starting your fundraising campaign!
Fundraising is a truly rewarding experience. But how should you get started?
Login to the Kidney Walk Participant Centre portal to start of your journey!

With the Participant Centre portal, you can personalize your fundraising page, manage your address book, create your email campaign as well as access your donation history.
All this in one place!

1. Select your walk region using the Register | Login drop-down menu found on the top-left of the Kidney Walk Home Page.(

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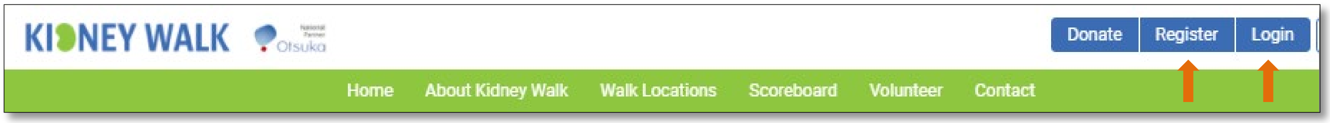
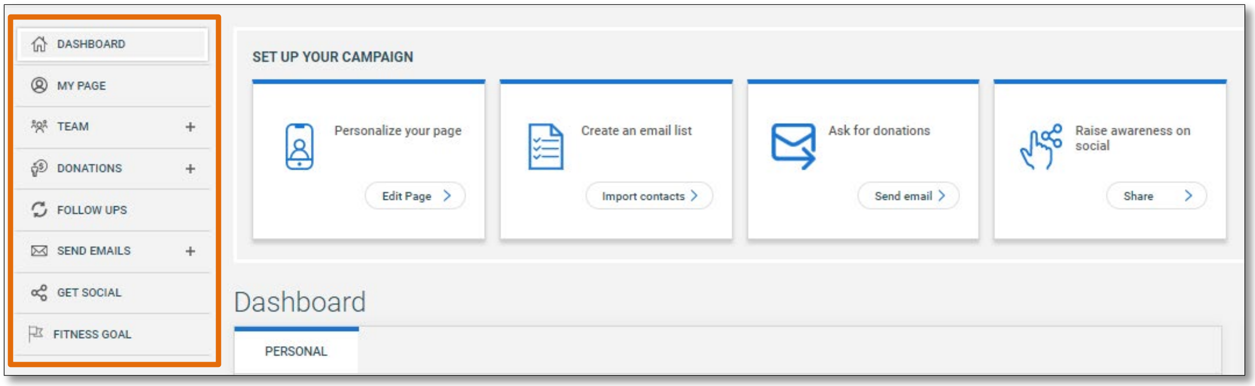
   New and returning participants to the Kidney Walk must first register to the current walk they wish to participate in. To do so, click on the "Register" button found on the top right of your screen. Then, follow the instructions presented on your screen.

2. Once registered, you can simply login to the participant centre using the "**Login**" button found on the top right of your screen. Then, enter your personal username and password.



3. To explore the different tools of the Participant Centre, click on the options from the left menu bar.



PERSONALIZE YOUR PAGES

PERSONALIZE YOUR PERSONAL PAGE

Your page is your campaign's online presence and where visitors will come to donate. Personalize your page to showcase why the cause is important to you and engage donors by adding images and videos, your story, a personal URL, and your fundraising goal.

Before editing your page, make sure that your photos and videos are ready to be published.

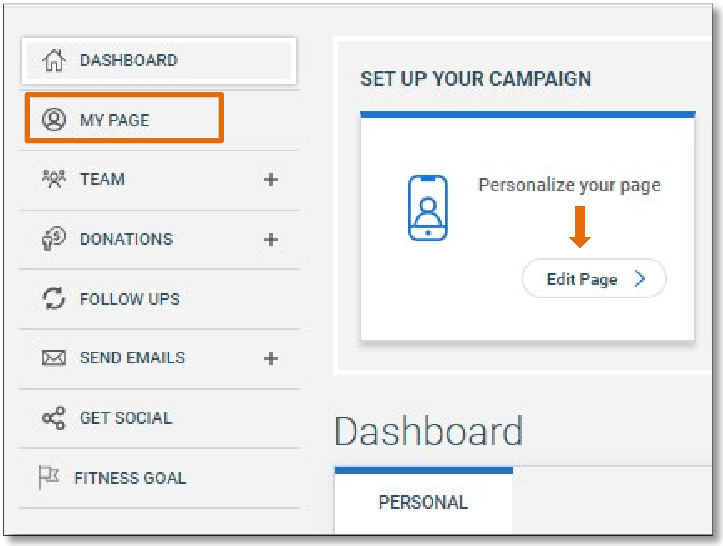
Photos Upload
Photos must be less than 2MB.
Reducing the size of your files can be done on your computer or camera's photo editor, or using an online service like the TinyJPG - Smart JPEG and PNG compression website.

It is also recommended to choose a photo where the subject is placed in the centre.
If shared on social media, this will lower the chances that important parts of your photo get cut off to fit platforms' requirements.

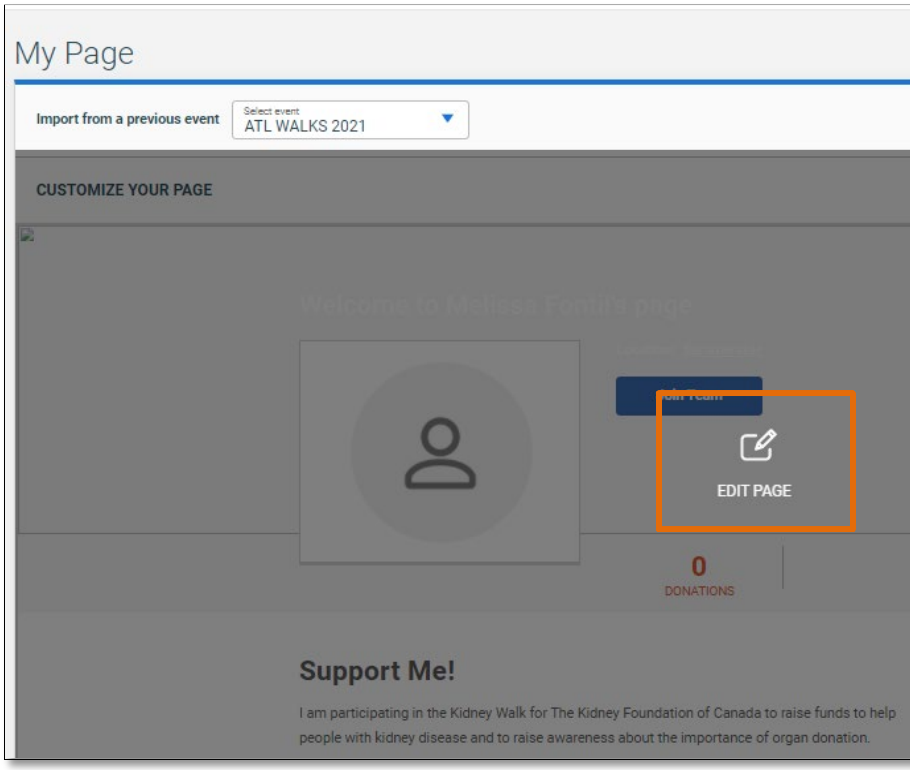
Videos Upload
Videos must first be uploaded to YouTube.

1. From the Participant Centre Dashboard, click on "**My Page**" from the left menu bar.

   If applicable, you can also use the "**Edit Page**" button from the "Set Up Your Campaign" section.



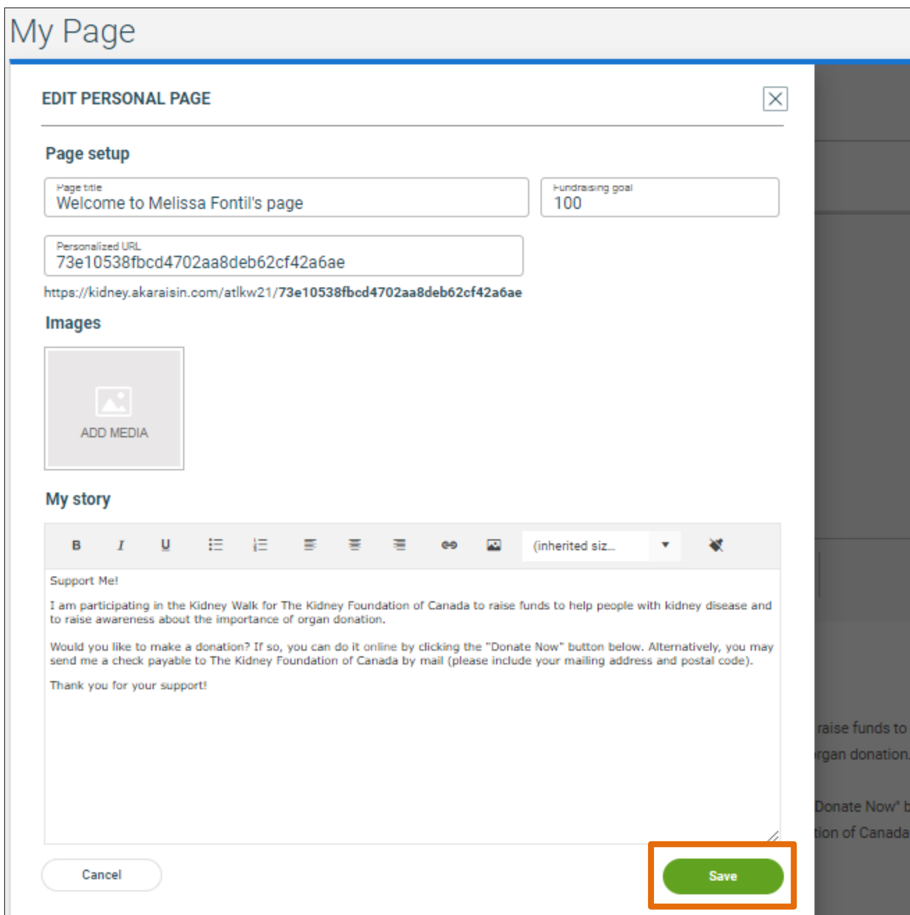
2. Put your cursor on the “Customize Your Page” section in the middle of the page and click “**Edit Page”.**



3. Use the “Edit Personal Page” window to modify and/or add your:

- personal page title
- fundraising goal
- personal URL
- images & videos
- text found under your story section

4. Review the information and remember to click on the “**Save**” button at the bottom right of the window to save all your changes.

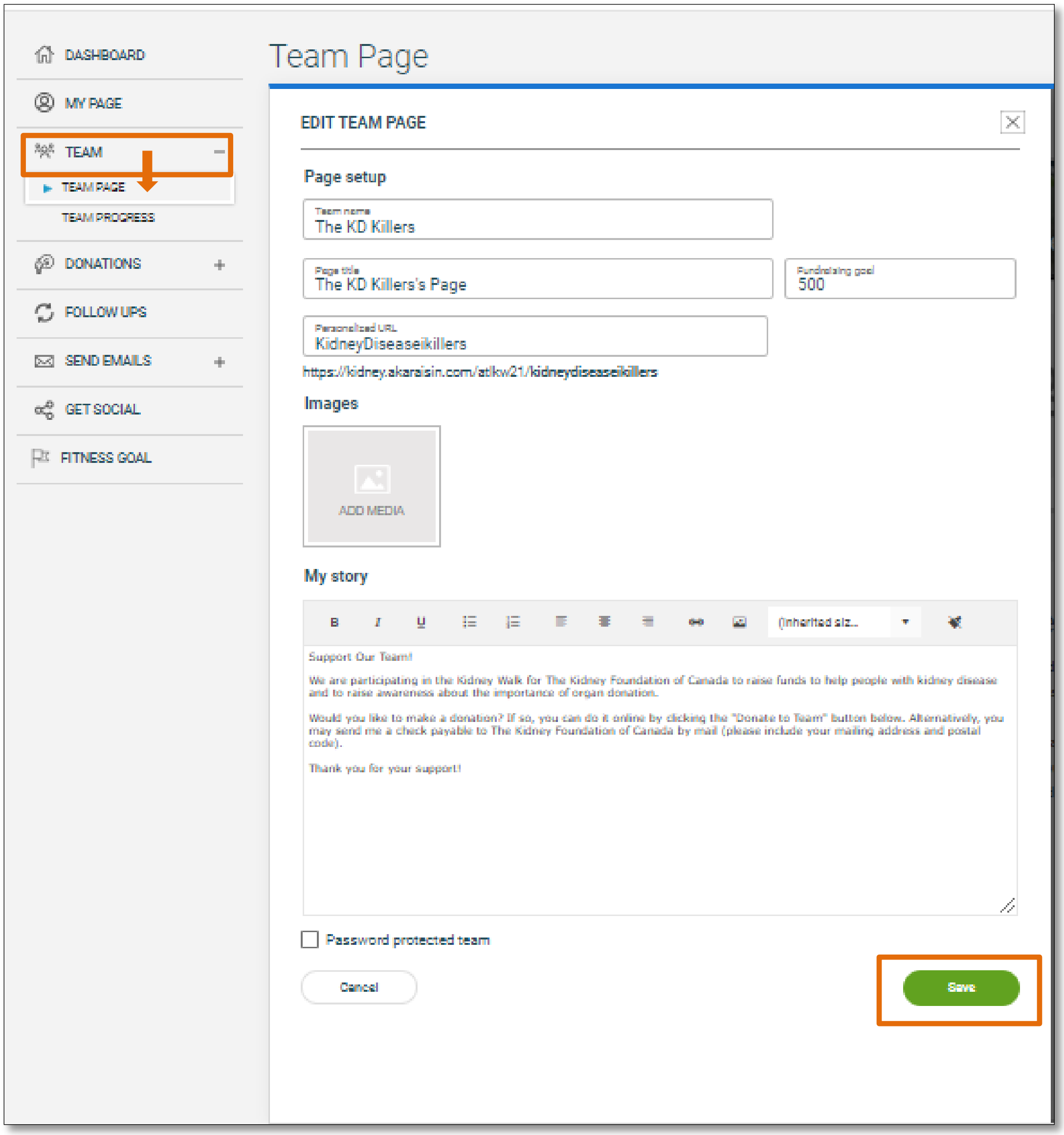


PERSONALIZE YOUR TEAM PAGE

Team captains will also have access to their team page, which can be personalized as well.

1. From the Participant Centre Dashboard, click on “**Team**”. Then, click on “**Team Page**” to start your customization.

2. Follow the same steps as for your personal page to personalize your team page (instructions found on the previous page).



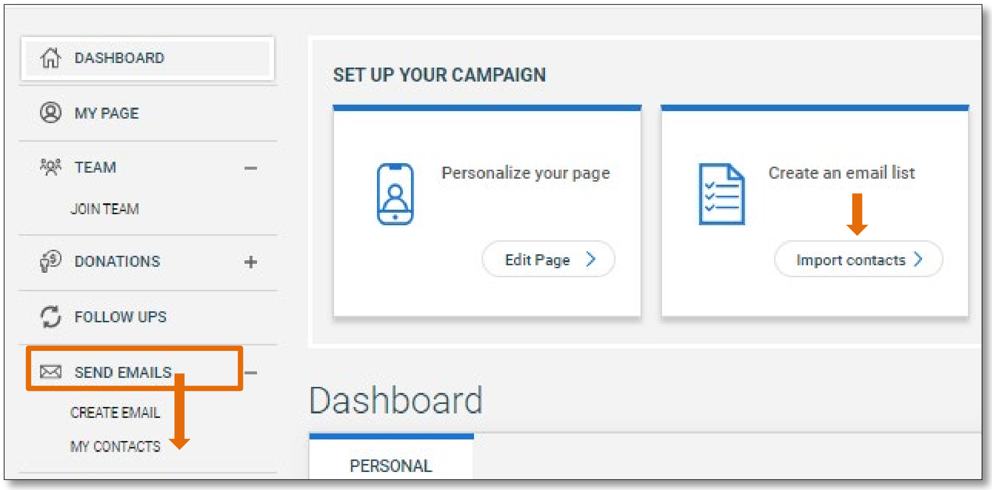
PERSONALIZE YOUR PAGES

CREATE YOUR CONTACT LIST

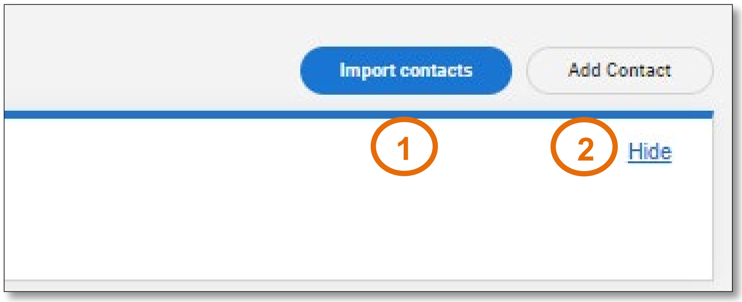
The “My Contacts” tool allows you to build an address book of potential donors by adding or importing contacts from other commonly used platforms.

1. From the Participant Centre Dashboard, click on “**Send Emails**” from the left menu bar and then, select “**My Contacts**”.

   If applicable, use the “**Import contacts**” button from the “Set Up your Campaign” Section.

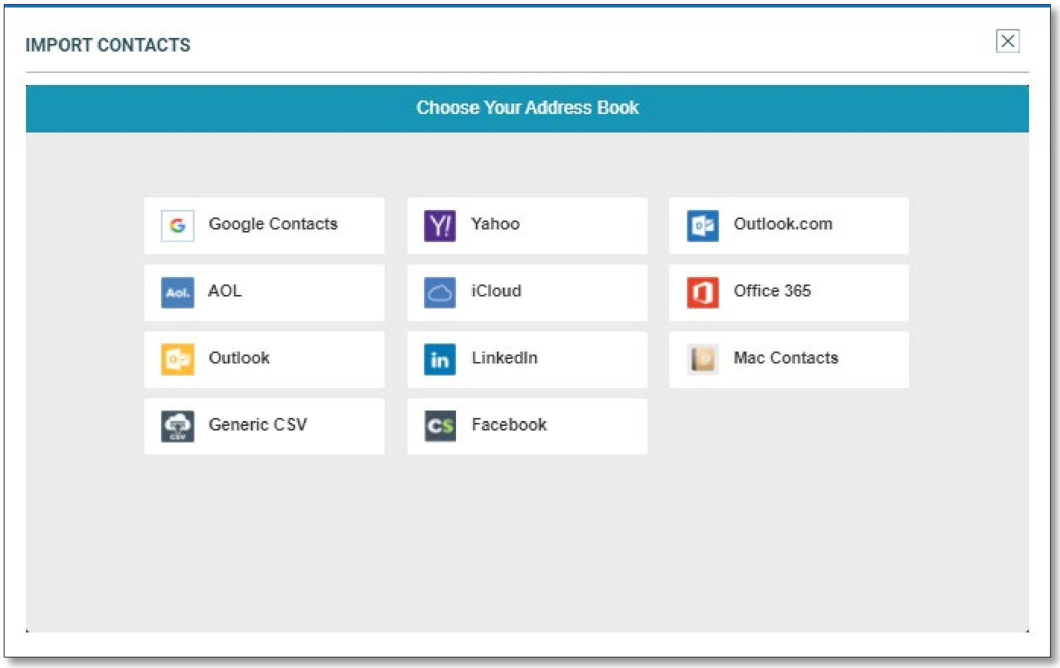


2. You can add your contacts using two different methods:



Method 1:
You can import contacts from an existing address book such as Outlook, iCloud, Google Contacts, an Excel CSV file and so many others.

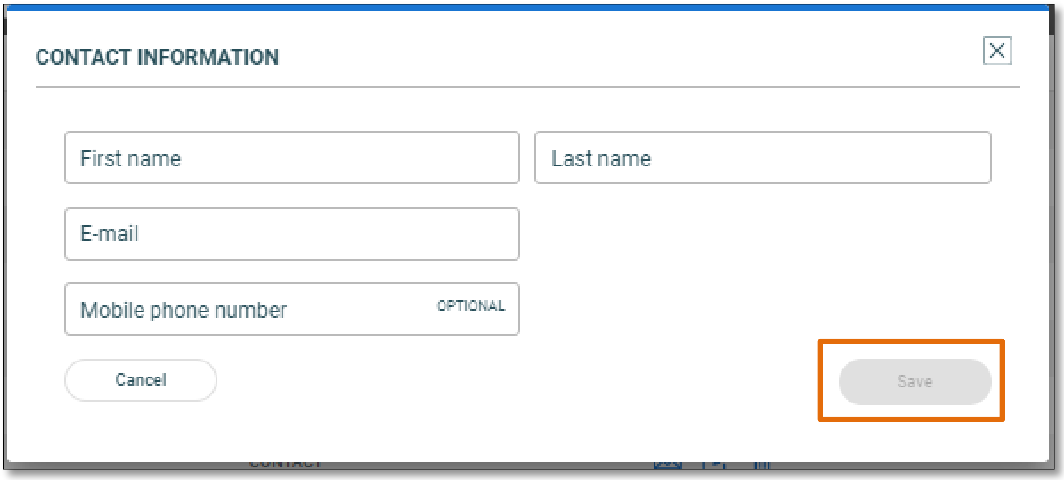
Select the preferred platform and follow the instructions on your screen to complete your import.



Most options available will require you to login to your personal account.
Don’t worry, your contacts are private to you only.

Method 2
You can manually add your contacts by typing the required information (first name, last name, and e-mail) for each contact you wish to e-mail.

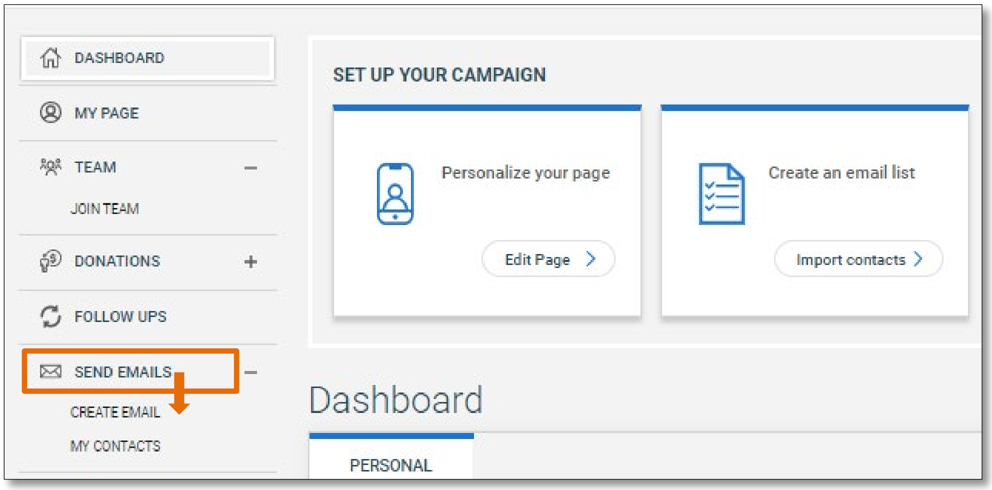
Use the “**Save”** button to save your contact information.



PERSONALIZE YOUR EMAIL CONTENT

Send a personalized email to your contacts to increase your chances of reaching your goal! Several sample emails are available for each step of your campaign or you can create your own email message using a blank email template.

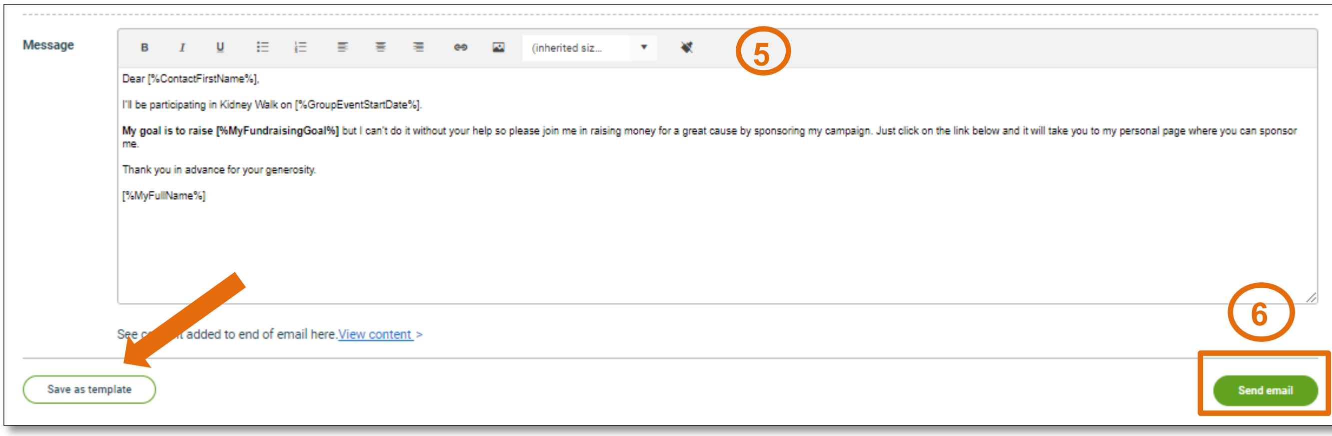
1. From the Participant Centre Dashboard, click on “**Send Emails**” from the left menu bar and then, select “**Create Emails**”.



2. Select a “**Template**” or start your message from scratch by using the “Blank Template”.

3. Enter or select the contacts that you would like to e-mail.
   Contacts can be added in a few ways:
   - If the contact has already been added, type their name or e-mail address and the system will automatically recognize them.
   - If the contact does not already exist in your list, you can type their e-mail address
   - Click the “**+**” icon to open your Contact List. Start populating your Address book according.

4. In the subject field, type and/or modify the subject line that you would like to appear in your e-mail.



If you selected a Sample E-mail,
the default message will appear in the Body of the message.

Your message will contain merge fields which will automatically insert the information of your contacts from your contact list when sent. You can identify these as text wrapped with [% and %].
If you wish to use this feature, do not modify the wrapped text.

5. In the message field, type your message.
   Use the tools at the top of the edit window to edit and format your message.

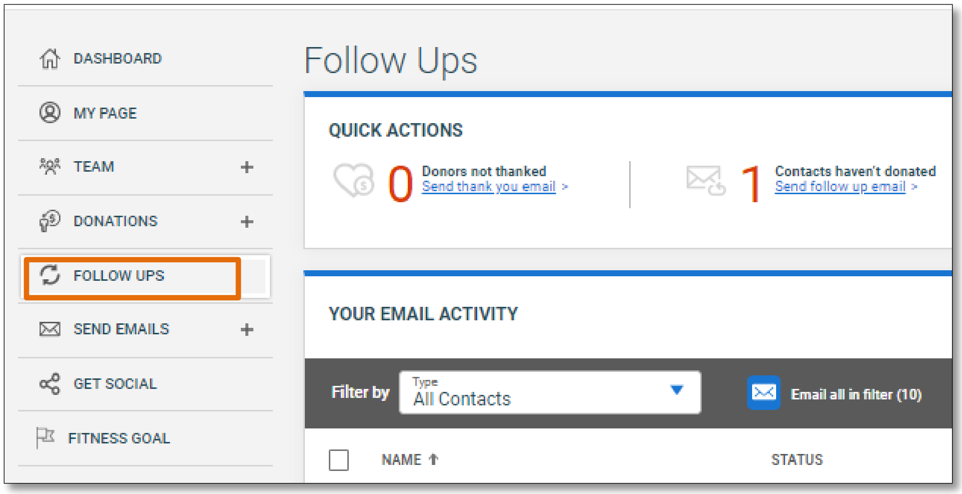
6. Review the information and “Save as Template” for future use or click on “**Send Email**” to send out your message.

EMAILS & DONATIONS FOLLOW UPS

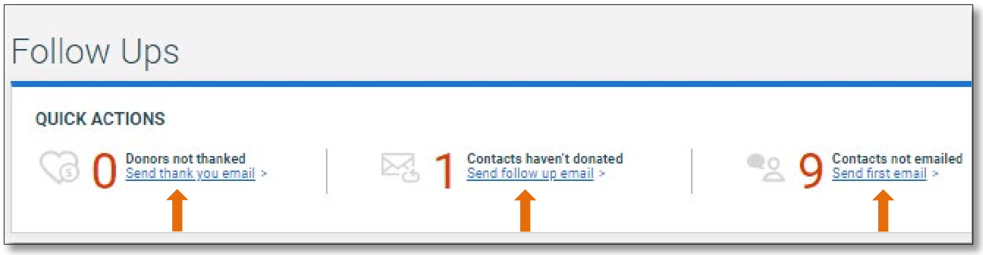
FOLLOW UP ON MY EMAILS

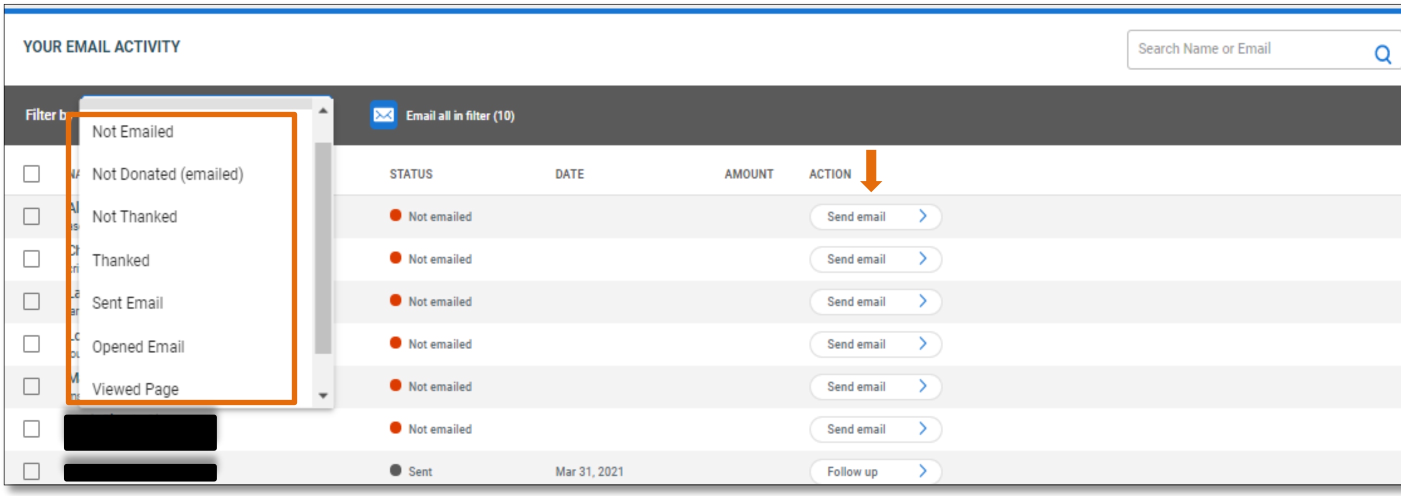
Track the effectiveness of your emails by seeing who opened or viewed your email or donated to you. This allows you to tailor your messages for new contacts, contacts you've already emailed or simply thank your donors.

1. From the Participant Centre Dashboard, click on "**Follow Ups**" from the left menu bar.



2. Take a look at the "**Quick Actions**" section. It will quickly filter and show you how many contacts you have in each category,so you can start an email to those contacts.





3. Filter your e-mail activity by contacts by using the "**Filter by**" drop down menu. There are a various filter types to support your campaign:

- All Contacts: All of your contacts found on the platform
- Not Emailed: New contacts who you have not yet emailed
- Not Donated (emailed): Contacts who you have emailed, but have not yet donated
- Not Thanked: Donors who you have not yet thanked
- Thanked: Thanked donors
- Sent Email: Contacts who you have emailed, but have not opened the email or donated
- Opened Email: Contacts who have opened one of your emails
- Viewed Page: Contacts who you have emailed and viewed you page, but not donated
- All Donors: All of your donors – thanked and not thanked

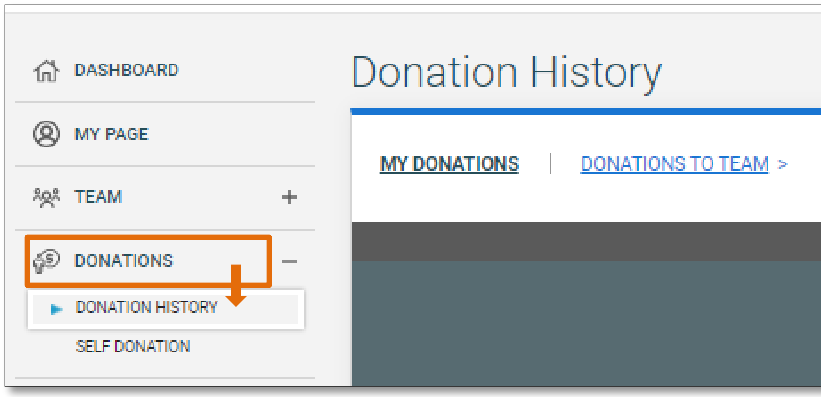
You will notice that donors who were not originally among your contacts are automatically added to the My Contacts and Follow-ups sections so that all donor information is kept together.

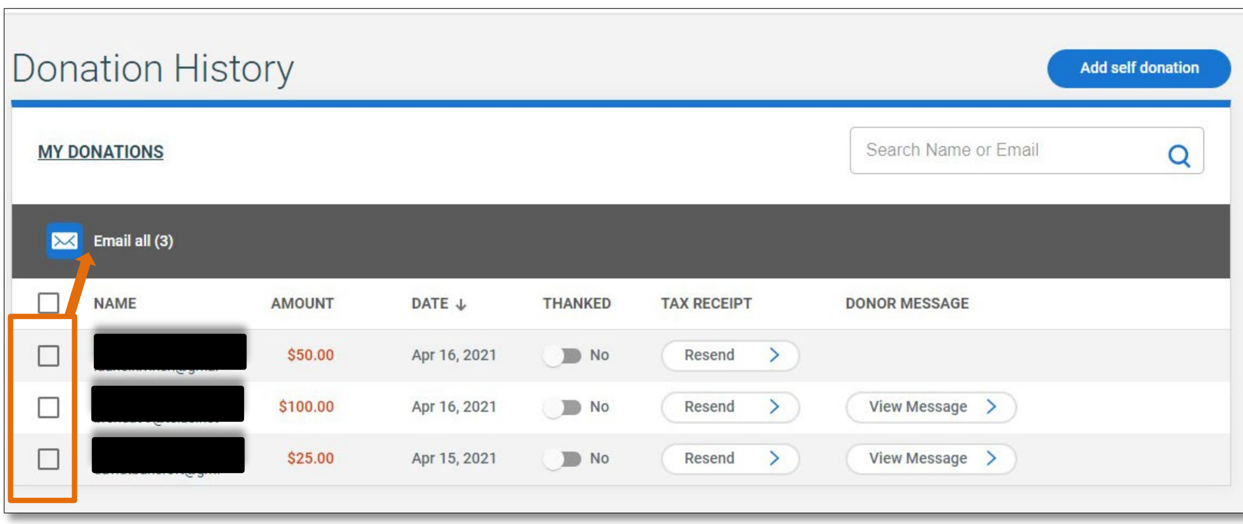
4. Use the buttons of the "Action" column to directly send an email or follow up with your contacts.

ACCESS YOUR DONATION HISTORY

See who has donated and track who you've personally thanked to ensure your donors feel appreciated. Team captains also can view and thank donors who have given directly to the Team.

1. From the Participant Centre Dashboard, click on "**Donations**" and then, select "**Donation History**" from the left menu bar.

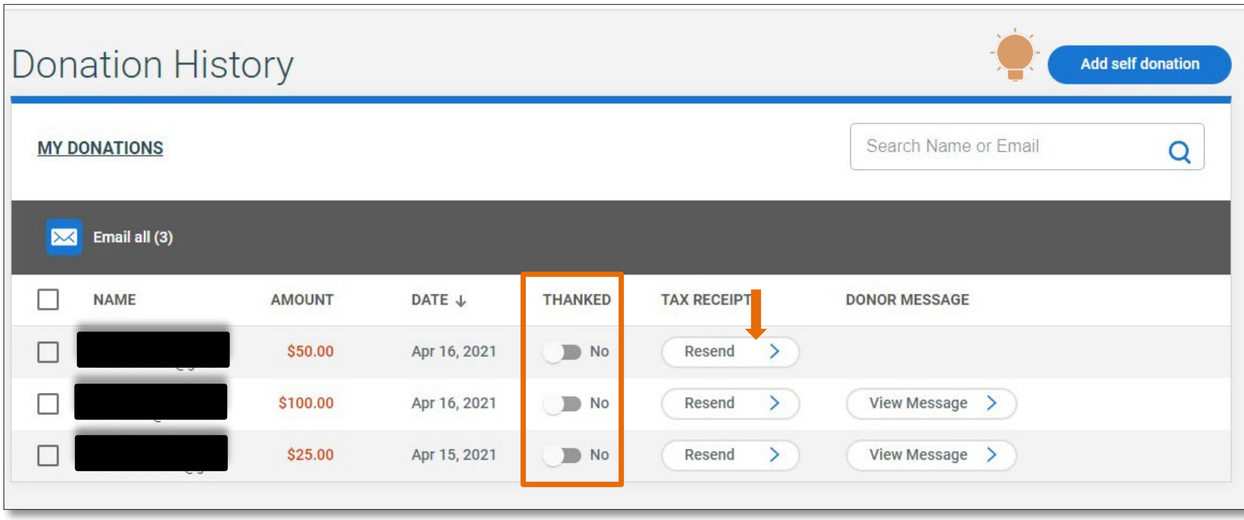




2. Thank your donors by checking the box next to each donor you wish to thank.

- You may select one or many donors to thank in a single email.
  If you can't find a donor, use the "Search" box to type their name directly or click the Name, Amount or Date column headers to re-sort your list.

- The contacts you chose will be available as recipients for you to send a personal thank you email to them. We recommend using the Thank You template made available to you!



- If you've thanked a donor outside of your Participant Centre (let's say by text on in-person), you can manually switch them by changing them to Yes. Doing so will automatically consider them as having been "thanked" and will exclude them from any filters for "Not thanked" donors.

- Use the "**Resend**" button "Tax Receipt" to re-issue to your donor(s) an electronic copy of their tax receipt. It is best practice to confirm their e-mail prior doing so.

  A Tax Receipt will automatically be sent to the donor's e-mail address listed in Donation History.

  Be sure to remind your donor(s) to check their junk mailbox, as the Tax Receipt will be sent from the Organization's e-mail address, not your e-mail.

You can always use the SELF DONATION button to make a quick donation as yourself to your campaign and/or team.

DONATE AND ADD OFFLINE DONATION

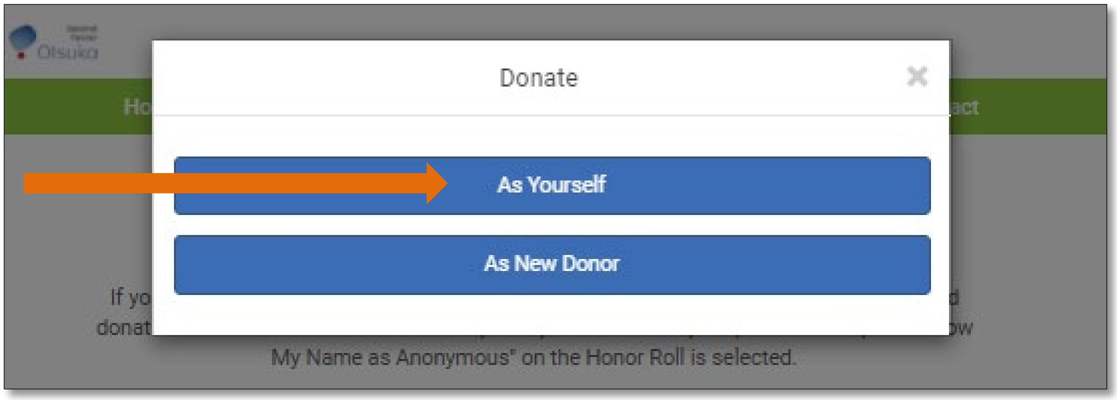
SELF DONATION

Give your fundraising goal a little boost by making a self donation.

1. From the Participant Center Dashboard, click on "**Donations**" and then, select "**Self Donation**" from the left menu bar.

2. In the Donate popup window:

   - Click on "**As Yourself**" to make a donation towards your own fundraising goal.



3. Follow the instructions found on your screen.
   Make sure to use your most updated personal information and address (this information will be used to send your tax receipt), then enter your credit card information to complete the transaction.

OFFLINE DONATIONS/PLEDGES

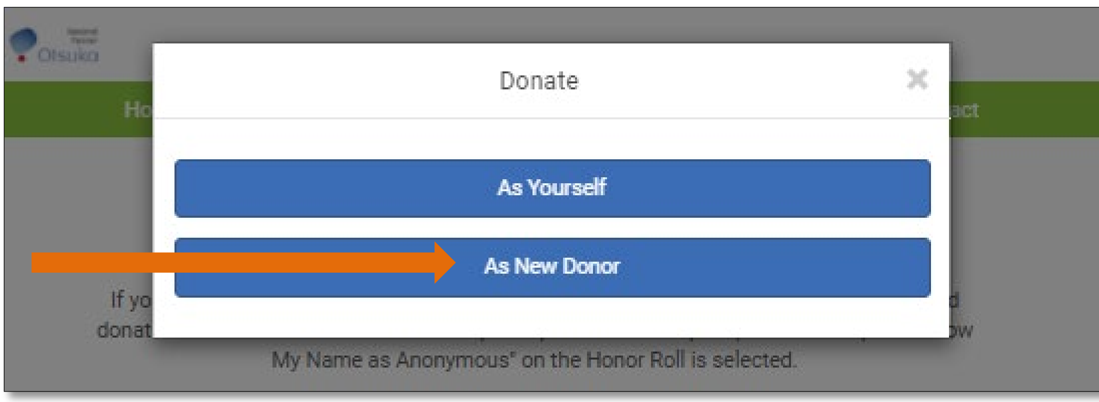
Enter your offline donations by using your own credit card to confirm cash donations right away!

1. From the Participant Center Dashboard, click on “**Donations**” and then, select “**Self Donation**” from the left menu bar.

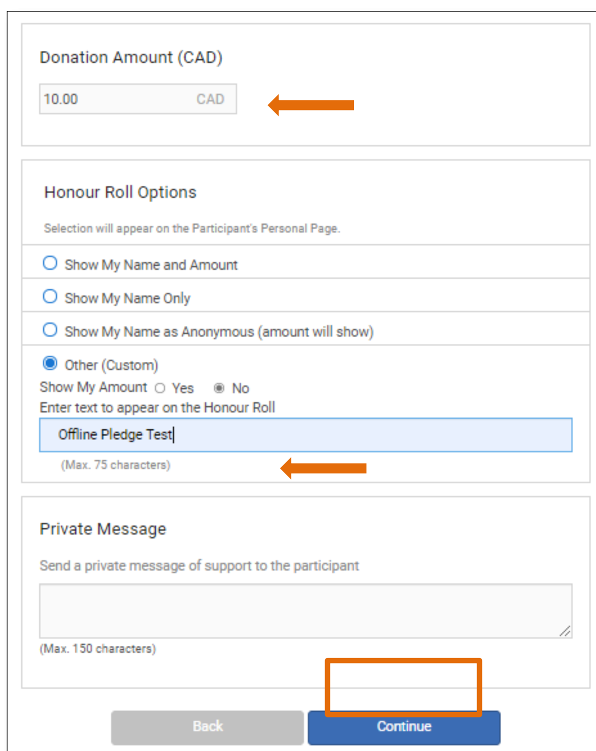
2. In the Donate popup window:

3. Click on “**As New Donor**” to enter a cash donation.

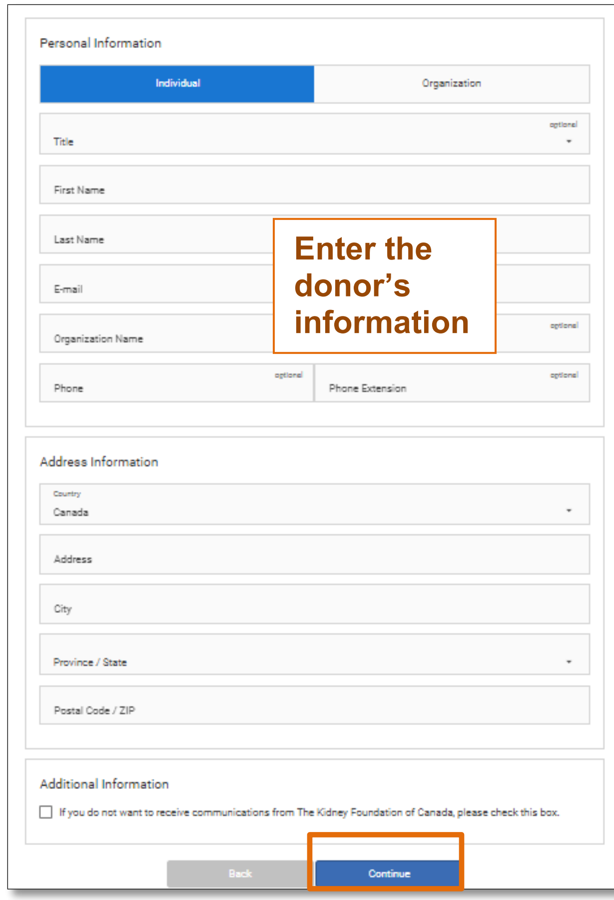
   Make sure to have your donor's personal information and address as this information will be used to send their tax receipt.



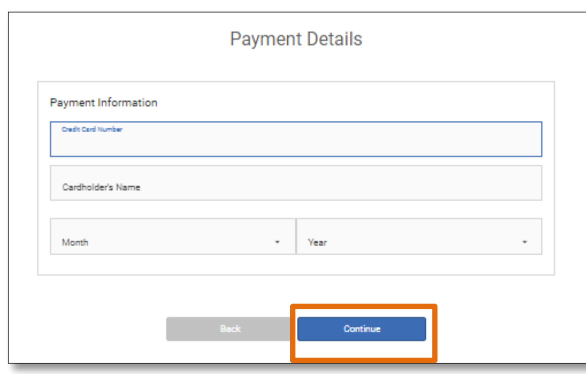
4. Enter the amount of the offline donation, the text to appear on your honour roll (i.e. the donor’s name – if applicable) and then, click on the “**Continue**” button.



5. Now, enter your donor's information and then, click "**Continue**".



6. Next, enter your credit card information and click "**Continue**".



7. Finally, you will be asked to carefully review the information entered. Complete the transaction by using the "**Process Payment**" button found at the bottom of the page.

Offline pledges (cash and cheque donations) can also be registered on your pledge sheet and given to your local Kidney Walk coordinator.

RAISE AWARENESS ON SOCIAL

CREATE SOCIAL MEDIA POSTS

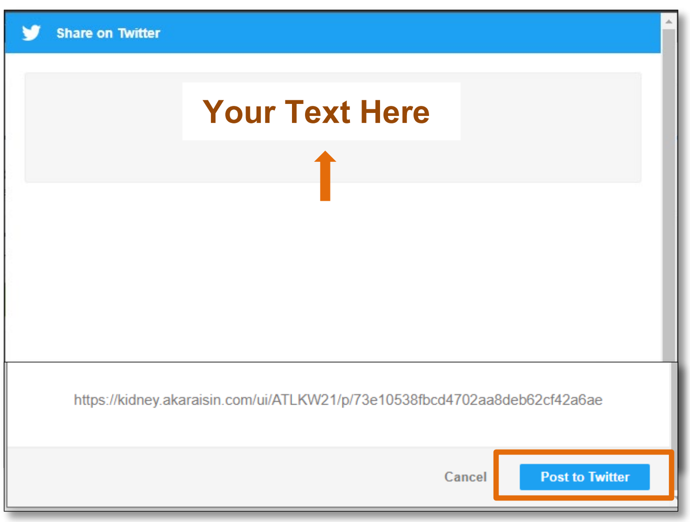
Spread the word about your campaign by creating a social media post! Tell your family and friends about why you're fundraising and how to support your goal. There is currently three main social networks from which you can create a post: Facebook, Twitter and LinkedIn. Try to be concise! Some platforms limit the number of characters.

1. From the Participant Centre Dashboard, click on "**Get Social"** from the left menu bar.

   Click on the green **social media** button of your choice.

2. In the next pop-up that appears, write your post in the gray text box provided. Your page photo and link are also automatically included in the post.

3. Click the "**Post to**" button at the bottom of the window. Log in to your account to complete the post.



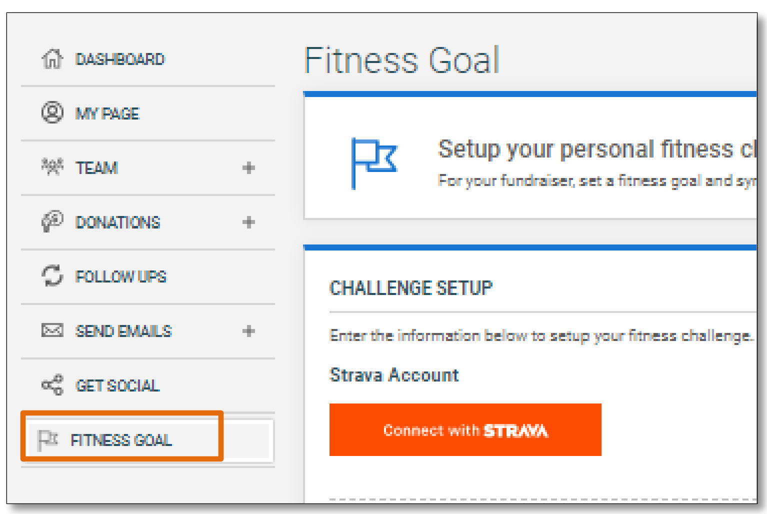
SHARE YOUR FITNESS GOAL

SET YOUR PERSONAL FITNESS GOAL

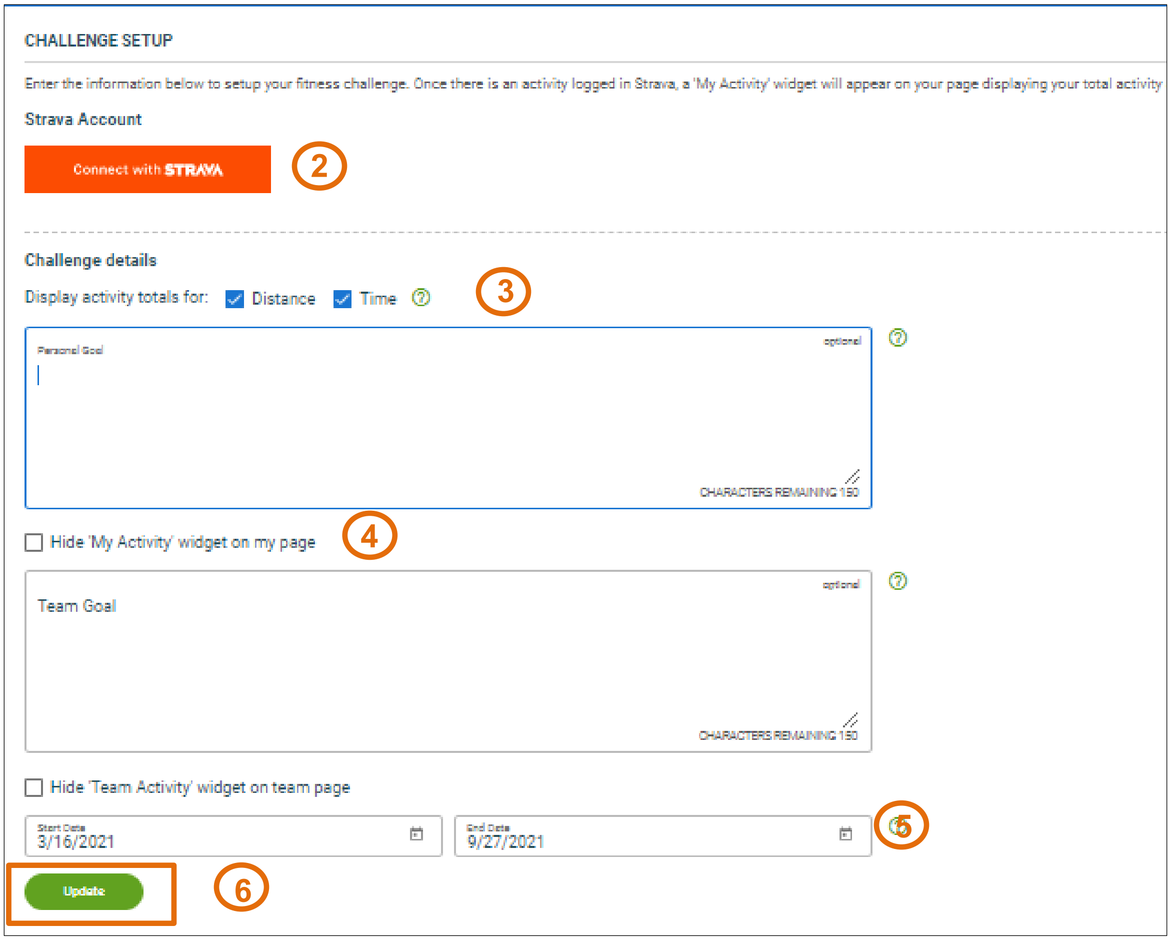
Connect with other walk participants by displaying on your page your personal fitness goal, post your walks on social media and share your achievements with your supporters and donors using STRAVA !

Strava is a multi-device fitness-tracking application helping millions of athletes worldwide achieve their fitness goal alongside other passionate and dedicated athletes.

1. From the Participant Centre Dashboard, click on "**Fitness Goal**" from the left menu bar.



You need a Strava account to display your fitness activity on your page. To set up a free account, visit [STRAVA - the fitness-tracking application website].



2. Once you have a Strava account, click on the orange "**Connect STRAVA**" button to start synching your activity. Enter your Strava username and password and follow the prompts to authorize permissions between accounts. It might take a couple of seconds before completion.

3. Your activity will be converted into Distance and Time on your page. Check which option(s) you would like to display.

4. Check the box to "Hide My Activity widget" if you'd like to keep the challenge private at any time. Team Captains will also have the option to "Hide Team Activity Widget" from their team's page by checking the appropriate box.

5. Choose the "**Start and End Date**" for your challenge.

6. Review the information entered and click the green "**Update**" button to save your changes.

GET HELP

SUPPORT

We are always here to support and help you!
Contact your local walk coordinator with any questions or for support.

Find their details under the “**Contact**” page on your location’s Kidney Walk Website.