PARTICIPANT CENTER USER GUIDE

Your online Participant Center offers you all the tools you will need to begin your fundraising campaign for the Bicycle Trek for Life and Breath. Every participant is automatically emailed their login information to their individual Participant Center account upon registering.

From your Participant Center you will have the ability to customize your personal or team page, email donors, create contacts lists, track your fundraising efforts and more! The easy-to-use functionality of your account will be an asset to you during your fundraising campaign, and have you fundraising like a champion in no time!

Please contact the Special Events Team at trek@bc.lung.ca or call 604.7361-5864 if you have any questions!

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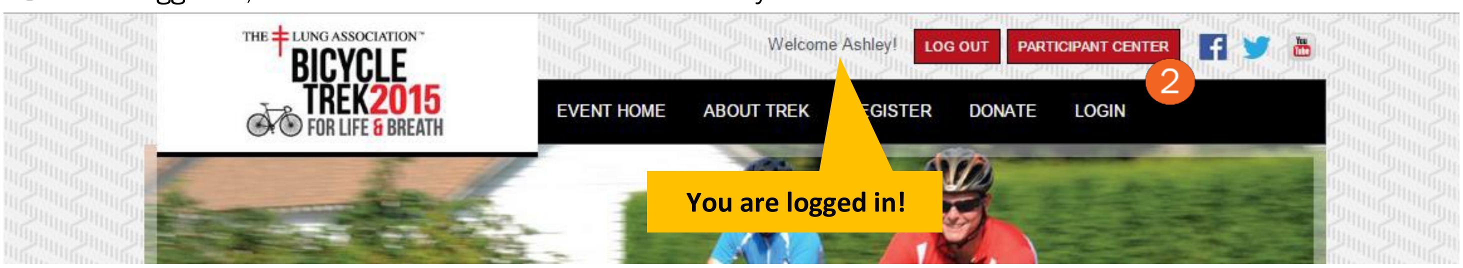
Logging In

ACCESS YOUR ACCOUNT

Log in to your Participant Center using the Username and Password you created during the registration process, or if you are a past rider, the Username and Password you were emailed to by the Special Events team. If you are unsure of your login information, please email trek@bc.lung.ca.

1 On the top right corner of the Event Home Page, please enter your Username and Password, then 'LOGIN'.

2 Once logged in, select 'PARTICIPANT CENTER' to access your account.



Note: If you want to register a friend or family member, you must LOG OUT first or risk over-writing your own registration.

Home Page

SPECIAL FEATURES

Once logged in to your Participant Center, from your 'HOME' page (top left tab) you will see the amazing features available to you to help you with your fundraising efforts.

1 By clicking on these tabs you will have access to the following:

Email - Send emails to potential Donors and other groups
Progress - Track your donation progress
Personal Page - Customize or make edits to your Personal Fundraising page
Team Page - Customize or make edits to your Team Fundraising page

2 Track your progress on the Fundraising Meter such as total fundraising amount & percentage of fundraising goal met.

3 Edit/change your Personal Fundraising Goal.

4 A record of all recent activity (ex. emails sent to donors or teammates & donations made to account). After a donor has made a donation, you may also send a template thank you email:

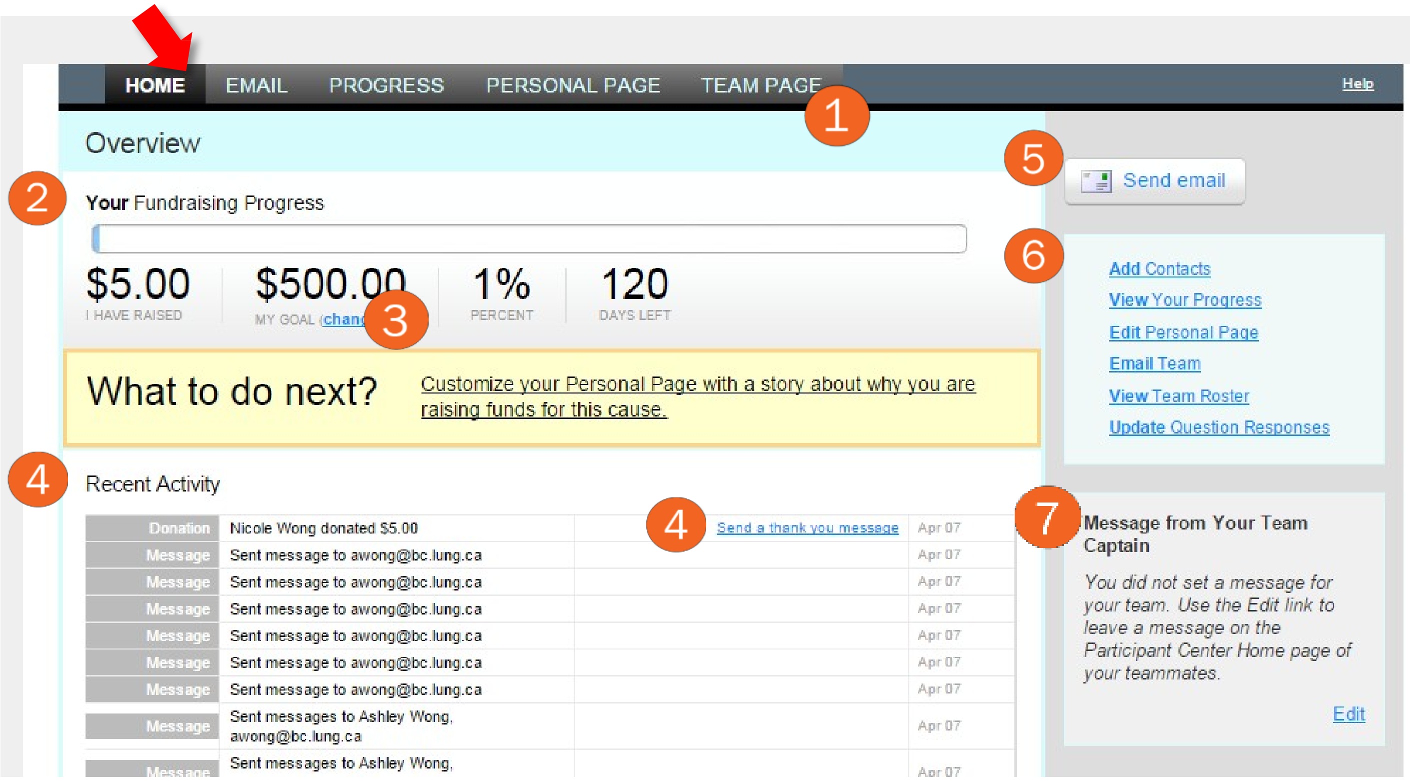
Send a thank you message

5 Send emails to potential donors.

6 Select these links for additional tools:

Add Contacts – Import contact or create 'Groups' of email recipients by entering or importing contacts
Email Team – Send direct emails to your teammates
View Team Roster – View a list of your teammates & team stats
Update Question Responses – Update your personal registration information (i.e. address, t-shirt size etc.)

7 Instant message your teammates and the message will appear on their Home Page. This is great for team communication such as sending reminders or fundraising and training tips!



Personal Page

CUSTOMIZE YOUR FUNDRAISING PAGE

Select the 'PERSONAL PAGE' tab to edit your Personal Fundraising Page.

1 Customize the title and message on your page. Feel free to customize the body of your content/message such as font style, font size, alignment and text colour.

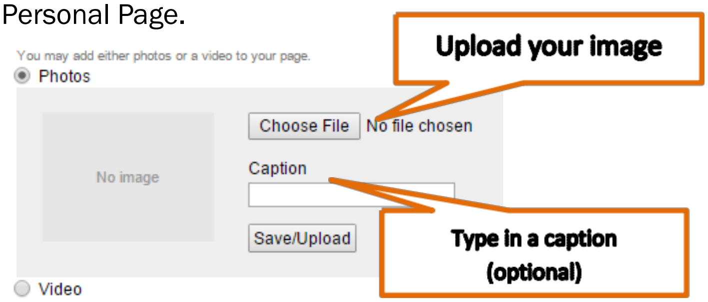
2 'Save' any changes or edits made. You may also 'Preview' your page before saving your edits.

3 Your default URL to your Personal Fundraising Page. You can use this URL when sending emails from an external email service.

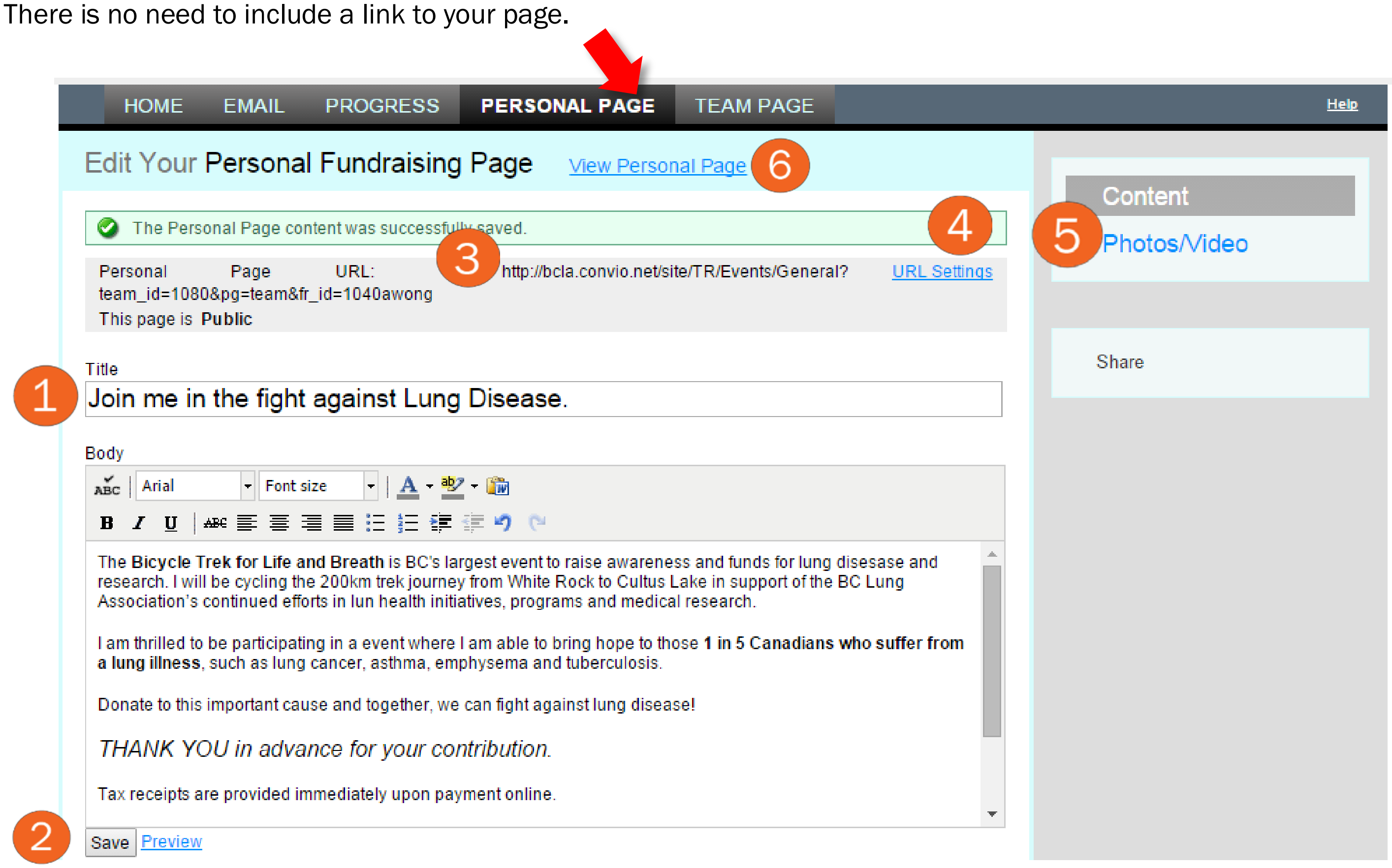
***When sending emails from your Participant Center, a URL link to your Personal Page and Team Page will automatically be included at the bottom of your email. There is no need to include a link to your page.

4 You can customize the URL link to your fundraising page, for example: http://bcla.convio.net/goto/johnsmith

5 Select 'Photos/Video' on the left column. Upload a Photo or Video to display on your Personal Page.



6 View what the public sees on your Personal Fundraising Page.



Team Page

CAPTAINS! CUSTOMIZE YOUR TEAM PAGE

Select the ‘TEAM PAGE’ tab. Similar to your Personal Page, your Team Fundraising Page shares the same functions and tools. You can upload and customize content to help your team’s fundraising efforts (and recruitment!).

***Note: Donors are donating to your Team General Account when donating to your Team Page.

1 Customize the message currently written on your Team Page. Feel free to customize the body of your content such as font style, font size, alignment and text colour.

2 Upload a Team Photo or preferred image (adding a caption with your photo is optional). Make sure to click ‘Save/Upload’.

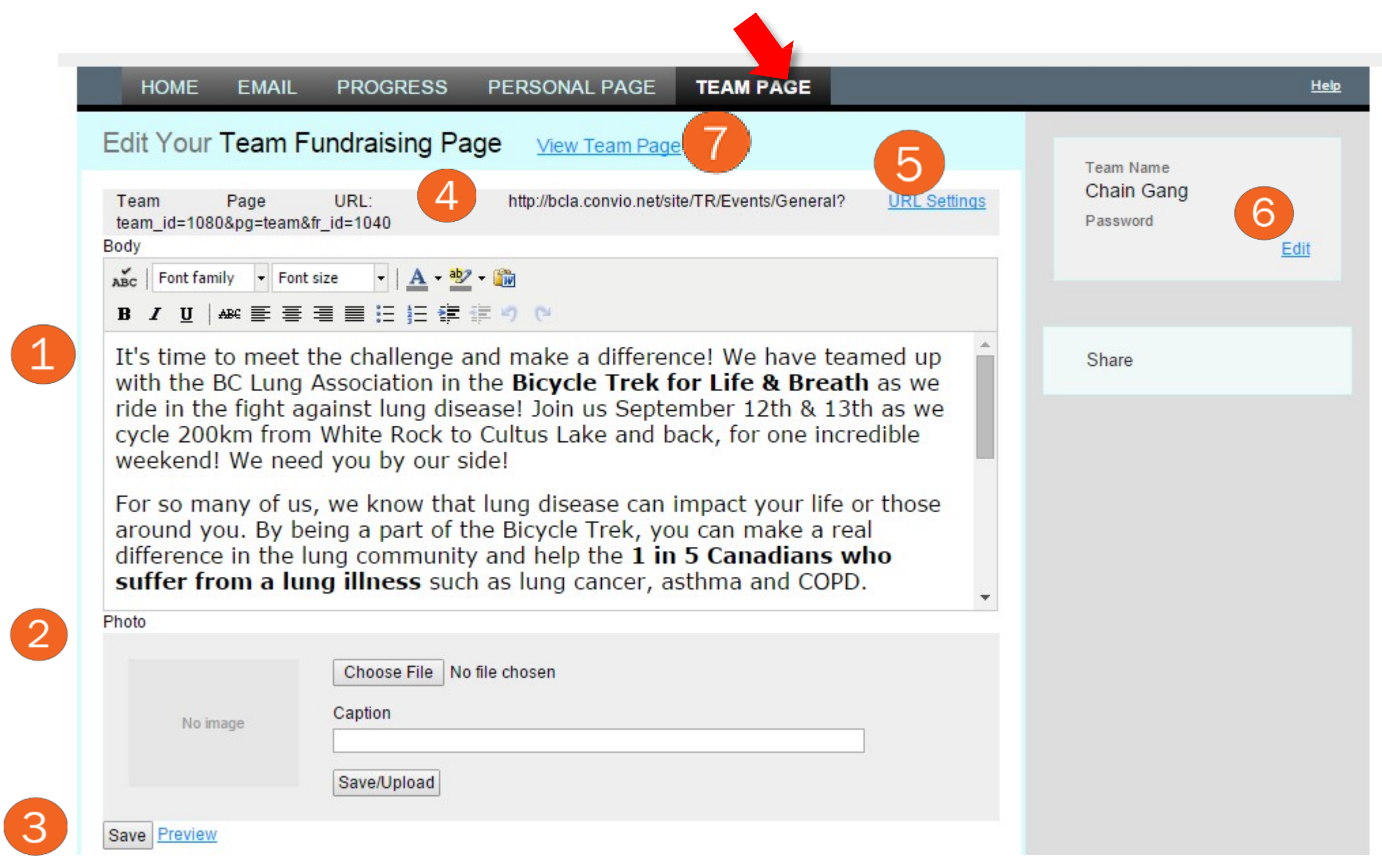
3 Click ‘Save’ to save changes or edits made in the body of your message. You may also ‘Preview’ your page before saving edits.

4 Your default URL link to your Team Fundraising Page. ***Note: when sending emails from the Participant Center a link to your Personal and Team Page will automatically be included at the bottom of your email.

5 You can customize the Team Page URL, for example to: http://bcla.convio.net/goto/teambclung

6 Select ‘Edit’ to change your Team Name.

7 View what the public sees on your Team Fundraising Page.

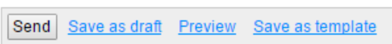


Send Emails

*** Remember, fundraisers that send emails raise more than those that do not!*

COMMUNICATE WITH YOUR DONORS

Select the 'EMAIL' tab > then 'Compose' (right column). Here, you may write your own emails, or to save time you can use (or edit) one of the suggested templates.

1 

Save as a draft - will allow you to save your progress and come back to this message later
Save as a template - will let you reuse that email again from the Template menu

2 Start by typing your contact's name in the 'To' field and it will automatically pull up the matching contact from your contact list. (Please see page 7 for more on creating and sending to Contact lists). If you did not upload your contact list, you can enter your contacts manually.

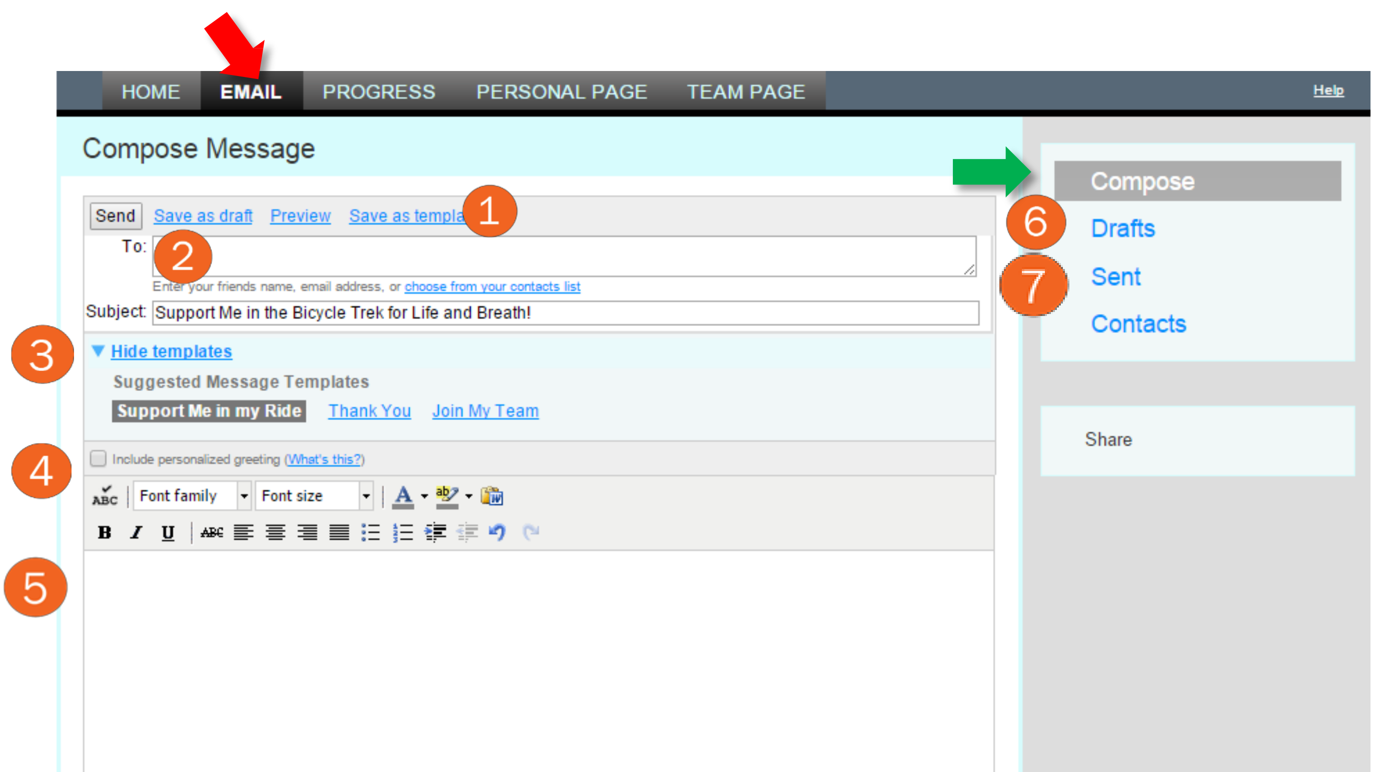
3 Select 'Use a template' to choose from a variety of pre-written messages that you can customize or use as-is! For example, use the "Join My Team" or "Thank You" template available.

4 Personalize each message with a personal greeting (ex. Dear *John*) if the email recipients have been pulled from your contact list.

5 Write your own message or customize existing templates.

6 Select 'Drafts' to access any unsent message that you saved earlier as a draft.

7 Select 'Sent' to review any messages you've already sent.



Contact Lists

IMPORTING CONTACTS AND CREATING GROUPS

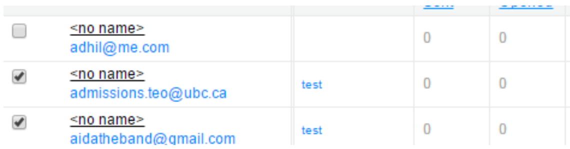
Select the 'EMAIL' tab > then 'Contacts' (right column). There is no need to manually input all your contacts; with Participant Center you may import and upload contacts in just a few easy steps.

1 If you use one of the following email providers: America Online, Yahoo, Outlook, Gmail or Plaxo you can import contact lists from your external email account by clicking 'Import contacts'.

2 To manually add single email addresses select 'Add single contact.'

3 Select 'Individuals' to see an entire list of your email addresses/contacts.

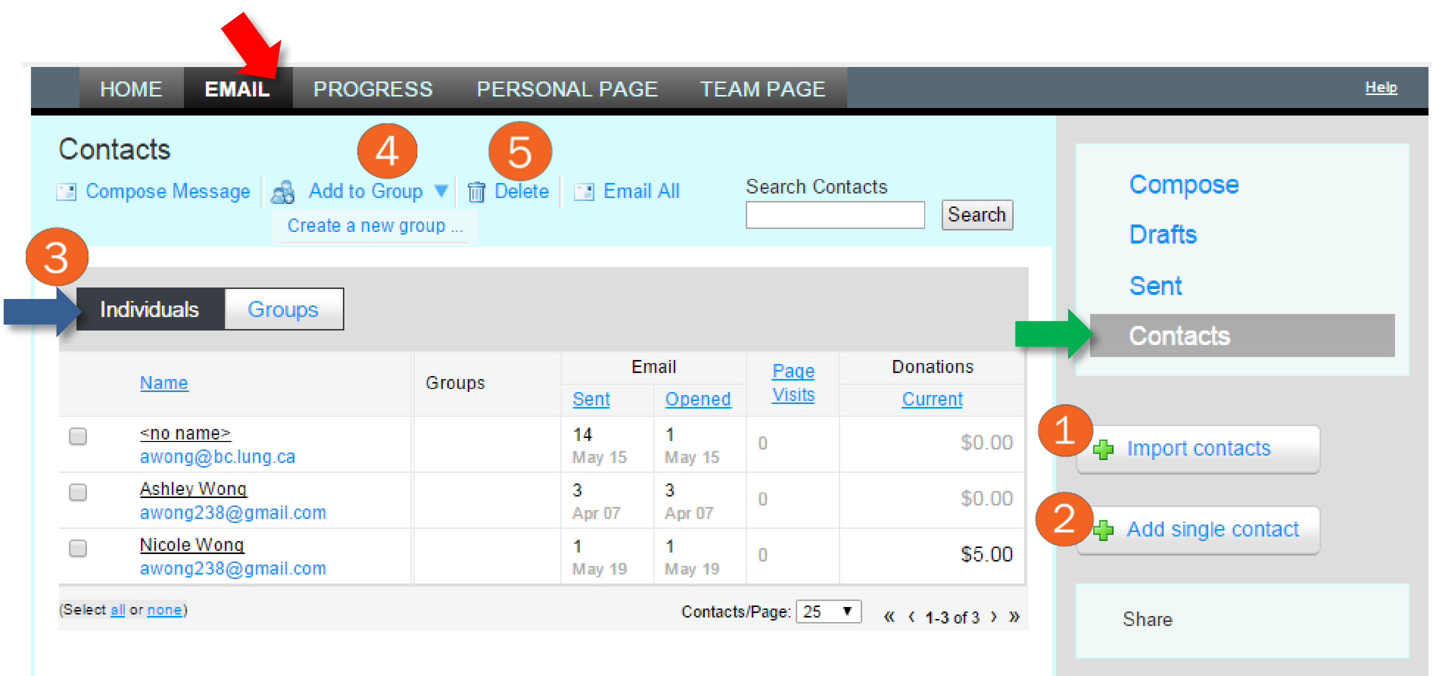
4 Add individual email contacts to a 'Group' by first selecting the check boxes next to each name,



then select 4 to 'Add to Group' . Click 'Create a New Group' to add addresses to a new customized group.

You can add multiple contacts to a group at once and select multiple contacts to email or delete, see 5.

The addresses are uploaded and cannot be viewed by anyone but you.



Email Groups

EMAILING AND ORGANIZING GROUPS

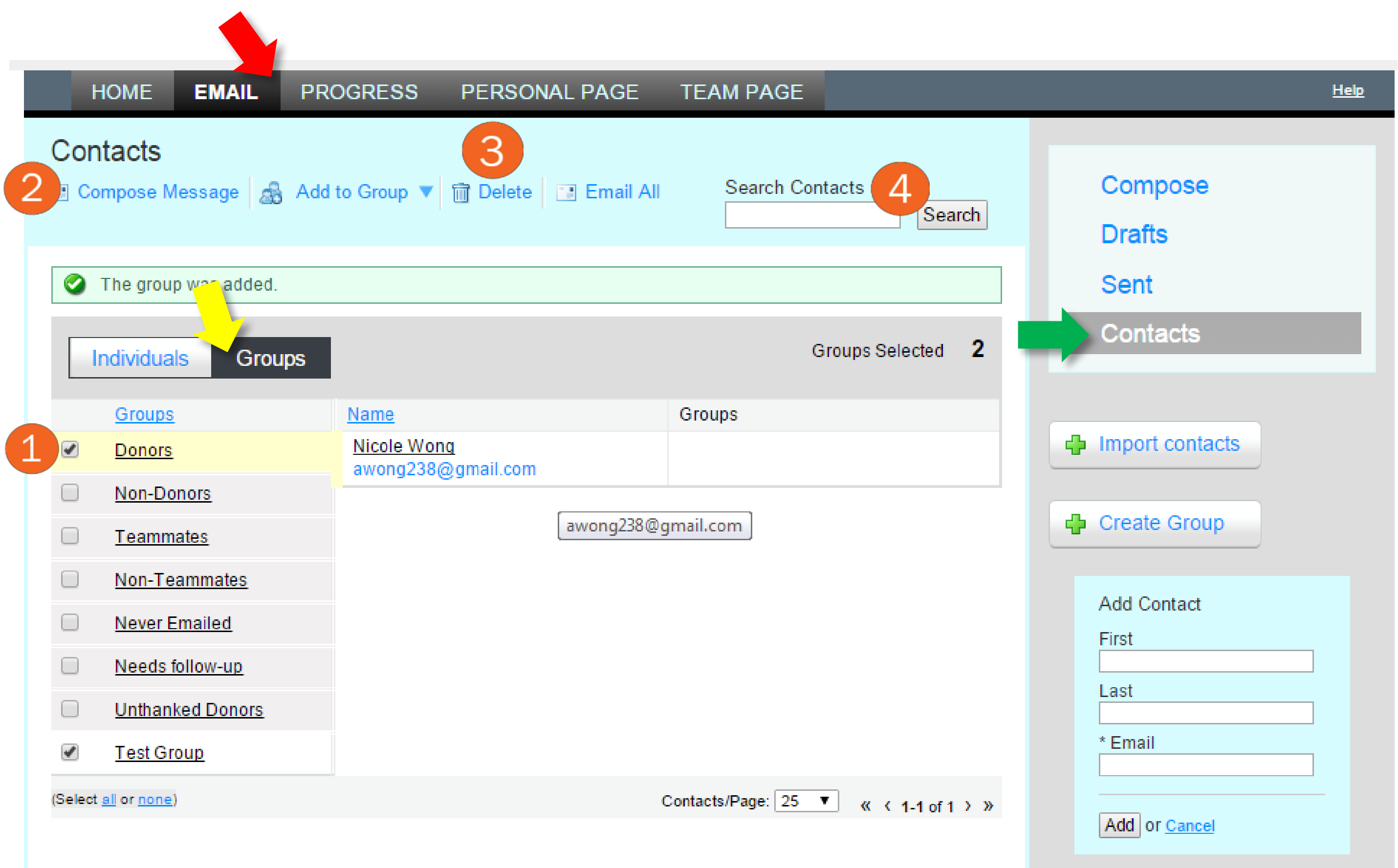
Select the 'EMAIL' tab > 'Contacts (right column) > then 'Groups' tab. Here, you will have the ability to send emails to specific groups such as Donors and/or Teammates. All your customized/created groups will be listed here as well.

1 You can select more than one group to send a message to by checking the boxes.

2 Once you have selected the groups you would like to send an email to, choose 'Compose Message'.

3 Delete 'Groups' or individual email addresses from your groups by checking off or selecting the emails you would like to delete.

4 Search individual emails from your Groups lists.



Progress

TRACK YOUR DONORS AND DONATIONS

Select the 'PROGRESS' tab. On your Personal Report, you can view how much you've fundraised, your fundraising goal, donations history and list of donors (as well as top 10 donors). From this page, you can also pull your donors' tax receipts.

<u>Personal Report:</u>

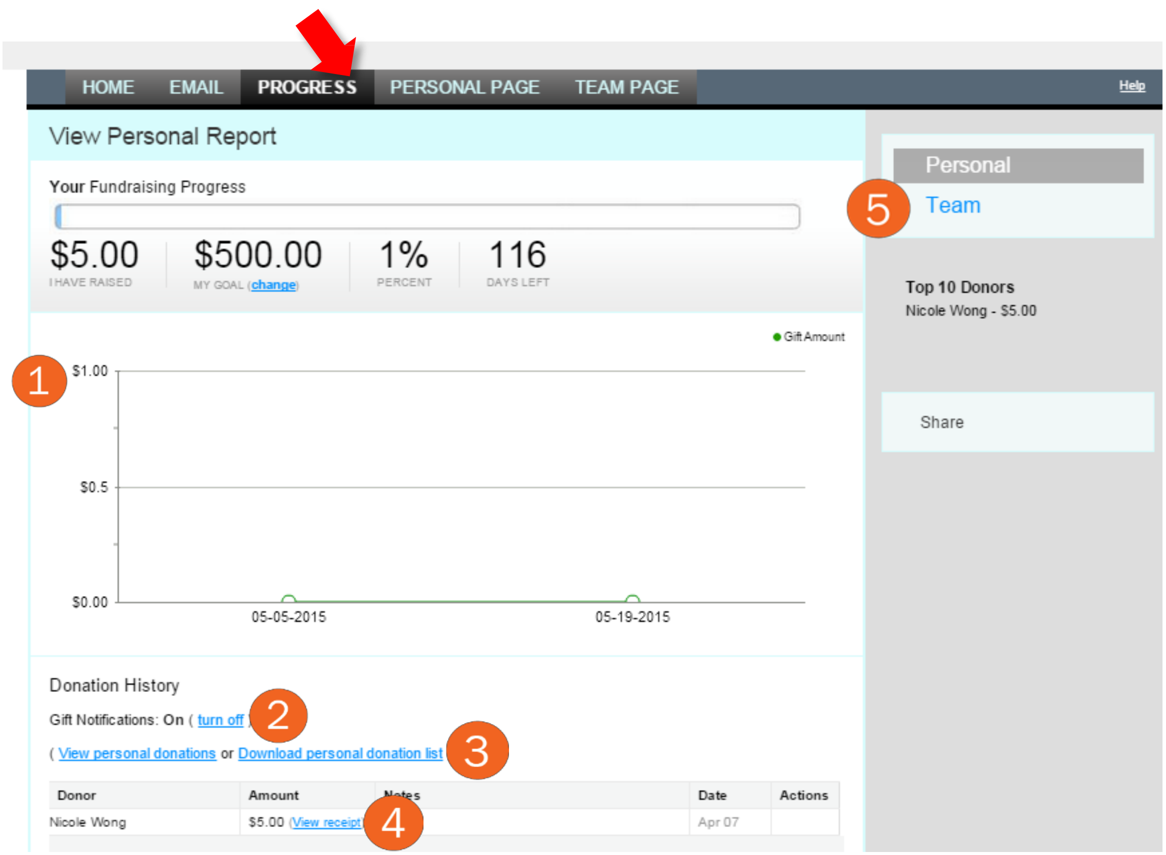
1 A chart detailing your fundraising efforts over a period of time with the amounts fundraised thus far.

2 Select 'turn off' if you would no longer like to receive notifications about donations made to your personal fundraising account

3 View a list of all the personal donations made to your account, or export an excel list of your donations & donors.

4 Review or print a .pdf of your donors' tax receipt by selecting 'View Receipt'.

<u>Team Report</u>: To view your Team Progress Report, click 5. Similar to your Personal Progress page, you can view your team donations history, team-specific donation history, contributing team members and top 10 donors across the Team.



Frequently Asked Questions (FAQs)

How do I upload an image to my Personal Fundraising Page?

Please refer to page 4, see 5.

How do I send emails to my teammates (if I am captain)?

Please refer to page 8, see 1 .

How do I send emails to my donors?

Please refer to page 8, see 1 .

How can I send a thank you email to my most recent donors?

Please refer to page 3, see 4 OR page 6, see 3.

How do I create a contact list by importing a list from another source?

Please refer to page 7, see 1.

How do I pull a Tax Receipt for my donor from my account?

Please refer to page 9, see 4.

How do I change my team name?

Please refer to page 5, see 6 .

How do I make edits to my registration information?

Please refer to page 3, see 6 under "Update Question Responses".

How do I remove a team member from my team?

Please contact the Special Events team at email trek@bc.lung.ca.

How do I join a team if I'm already registered as an individual rider?

Please contact the Special Events team at email trek@bc.lung.ca.

For any other questions, please do not hesitate the Special Events team at trek@bc.lung.ca or 604.731.5864.