



# 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](mailto:trek@bc.lung.ca) or call 604.7361-5864 if you have any questions!

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# Logging In

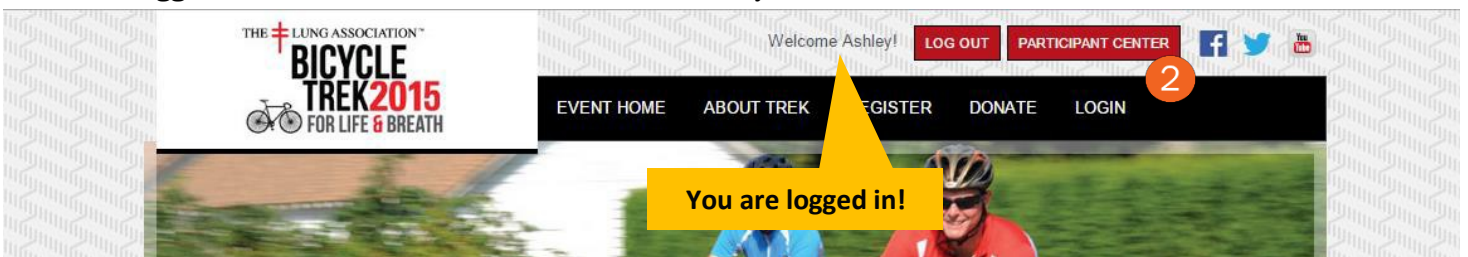
## ACCESS YOUR ACCOUNT

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](mailto: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!

The screenshot shows the 'HOME' page of a Participant Center. At the top, there is a navigation bar with tabs for HOME, EMAIL, PROGRESS, PERSONAL PAGE, and TEAM PAGE. A red arrow points to the HOME tab. Below the navigation bar is the 'Overview' section, which includes a 'Your Fundraising Progress' meter showing \$5.00 raised out of a \$500.00 goal, with 1% completion and 120 days left. A 'Send email' button is visible. Below the meter is a 'What to do next?' section with a link to 'Customize your Personal Page'. The 'Recent Activity' section shows a list of donations and messages, with a 'Send a thank you message' link. On the right side, there are several tool links: 'Add Contacts', 'View Your Progress', 'Edit Personal Page', 'Email Team', 'View Team Roster', and 'Update Question Responses'. At the bottom right, there is a 'Message from Your Team Captain' section with a message and an 'Edit' link.

# 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.

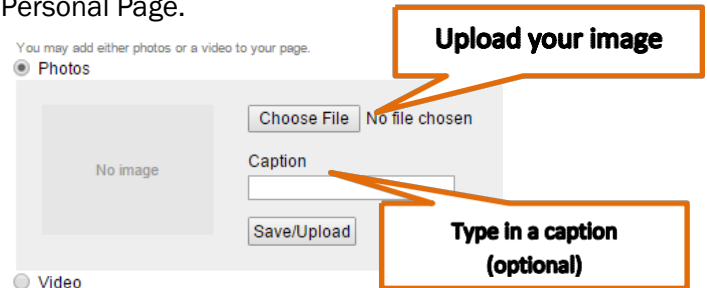
2 'Save' any changes or edits made. You may also 'Preview' your page before saving your edits.

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

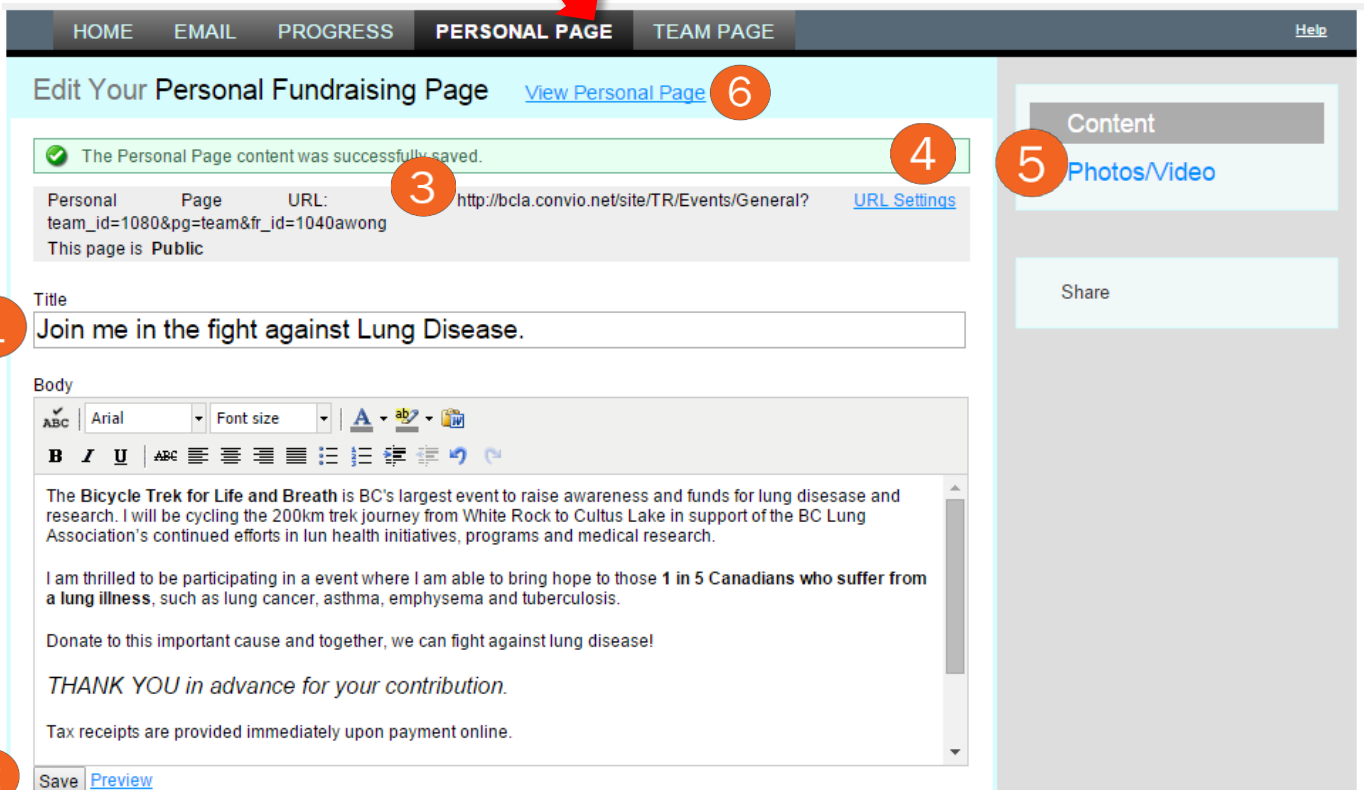
\*\*\*When sending emails from your Participant Center, a URL link to your Personal Page and Team Page will automatically be included at the bottom of your email. There is no need to include a link to your page.

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'.

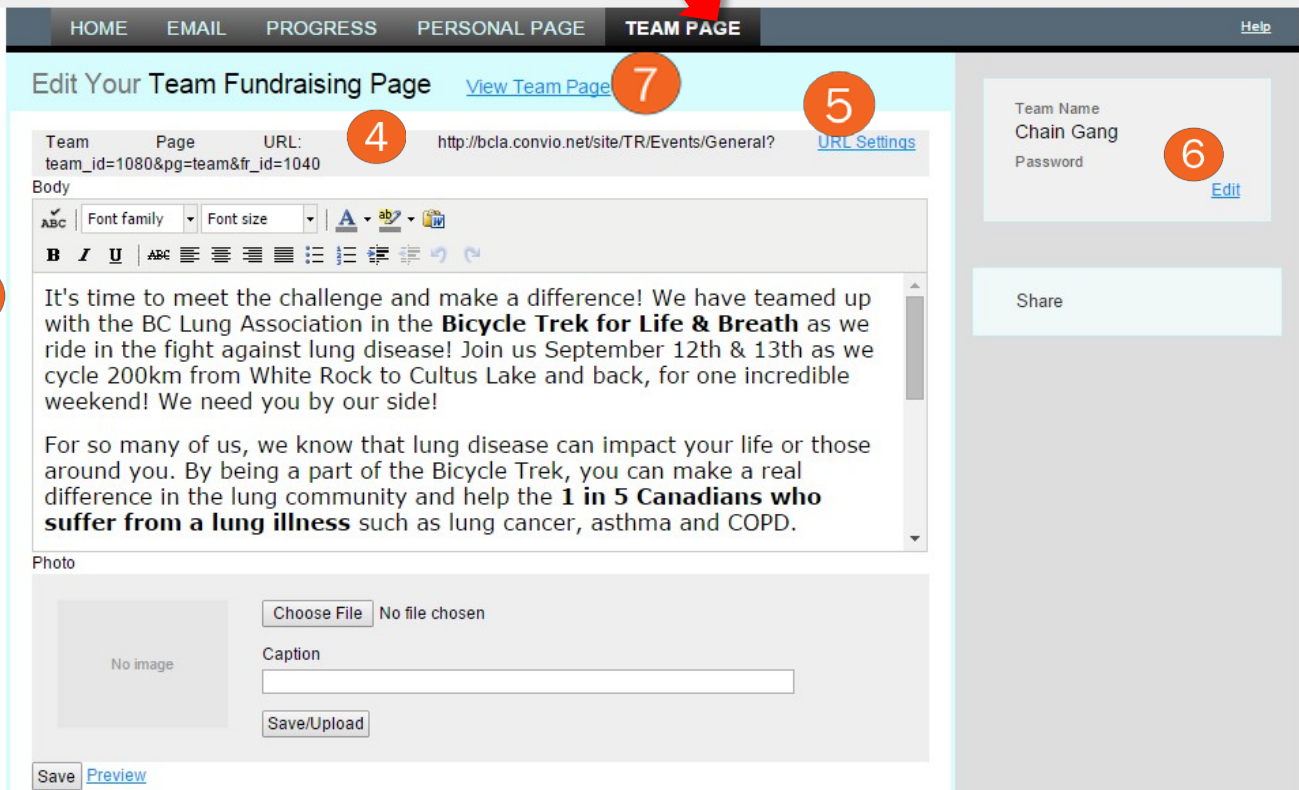
3 Click 'Save' to save changes or edits made in the body of your message. You may also 'Preview' your page before saving edits.

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.



The screenshot shows the 'Edit Your Team Fundraising Page' interface. At the top, a navigation bar includes 'HOME', 'EMAIL', 'PROGRESS', 'PERSONAL PAGE', and 'TEAM PAGE' (highlighted with a red arrow). Below the navigation bar, the page title is 'Edit Your Team Fundraising Page' with a 'View Team Page' link. The main content area is divided into several sections:

- 1** The 'Body' section contains a rich text editor with a toolbar (bold, italic, underline, font family, font size, link, unlink, list, list, link, unlink, undo, redo) and a text area containing the following text:



It's time to meet the challenge and make a difference! We have teamed up with the BC Lung Association in the **Bicycle Trek for Life & Breath** as we ride in the fight against lung disease! Join us September 12th & 13th as we cycle 200km from White Rock to Cultus Lake and back, for one incredible weekend! We need you by our side!

For so many of us, we know that lung disease can impact your life or those around you. By being a part of the Bicycle Trek, you can make a real difference in the lung community and help the **1 in 5 Canadians who suffer from a lung illness** such as lung cancer, asthma and COPD.
- 2** The 'Photo' section includes a 'Choose File' button (labeled 'No file chosen'), a 'Caption' input field, and a 'Save/Upload' button.
- 3** At the bottom left, there are 'Save' and 'Preview' buttons.
- 4** The 'URL' field shows 'http://bcla.convio.net/site/TR/Events/General?' with a 'URL Settings' link.
- 5** The 'URL Settings' section on the right includes 'Team Name' (Chain Gang) and 'Password' (with an 'Edit' link).
- 6** A 'Share' button is located below the 'URL Settings' section.
- 7** A 'View Team Page' link is located at the top right of the main content area.

# 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.

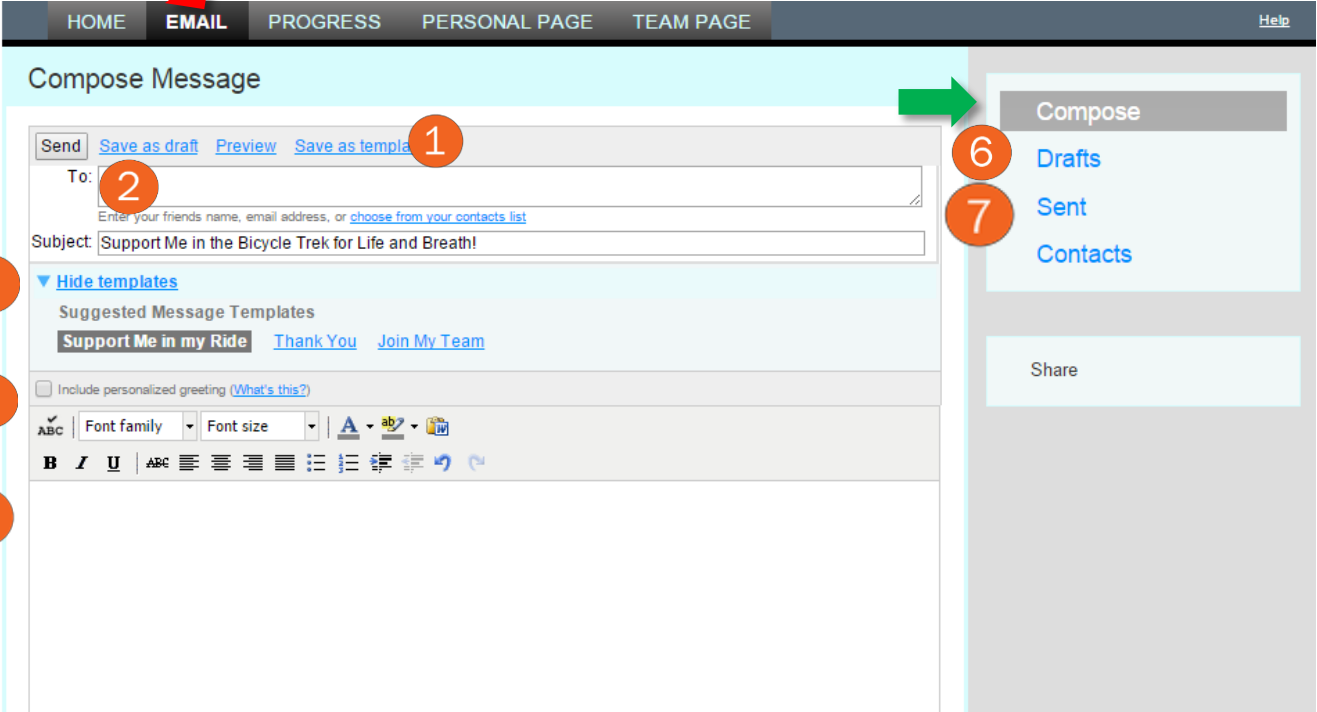
3 Select 'Use a template' to choose from a variety of pre-written messages that you can customize or use as-is! For example, use the "Join My Team" or "Thank You" template available.

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.




The screenshot shows the 'Compose Message' interface. At the top, a navigation bar includes 'HOME', 'EMAIL' (highlighted with a red arrow), 'PROGRESS', 'PERSONAL PAGE', and 'TEAM PAGE'. The 'Compose Message' header is in a light blue bar. Below it, the 'Send' button is circled with a red arrow. The 'To:' field is circled with a red arrow. The 'Subject' field contains 'Support Me in the Bicycle Trek for Life and Breath!'. Below the subject field, there are 'Suggested Message Templates' including 'Support Me in my Ride', 'Thank You', and 'Join My Team'. A 'Hide templates' link is also visible. The 'Include personalized greeting' checkbox is checked. The text formatting toolbar includes options for font family, font size, bold, italic, underline, and text color. On the right side, a sidebar contains 'Compose', 'Drafts', 'Sent', and 'Contacts' buttons, with 'Drafts' and 'Sent' circled in red. A 'Share' button is located below the sidebar. The page number '6 | Page' is visible in the bottom right corner.



# Contact Lists

## IMPORTING CONTACTS AND CREATING GROUPS

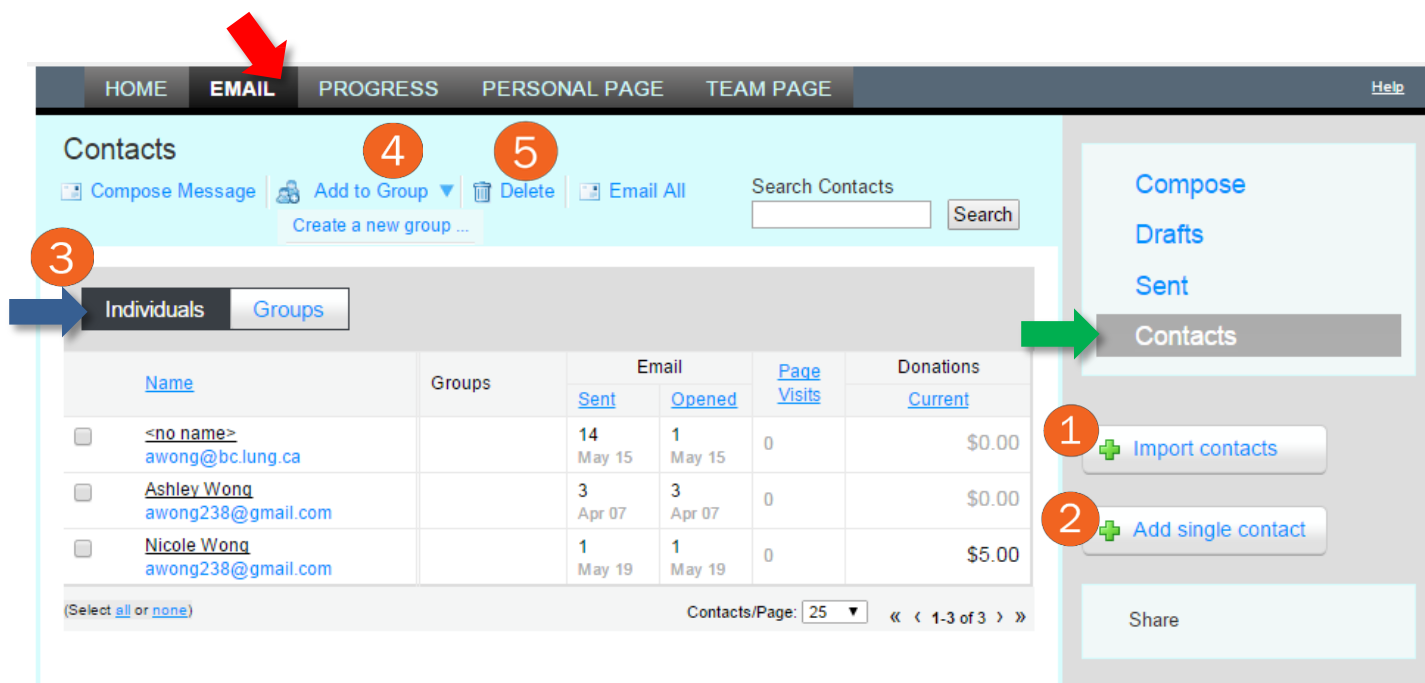
Select the  'EMAIL' tab > then  'Contacts' (right column). There is no need to manually input all your contacts; with Participant Center you may import and upload contacts in just a few easy steps.

- 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,

<input type="checkbox"/>	<no name> adhil@me.com		0	0	
<input checked="" type="checkbox"/>	<no name> admissions.leo@ubc.ca	test	0	0	
<input checked="" type="checkbox"/>	<no name> aidatheband@gmail.com	test	0	0	

then select  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 .

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



**EMAIL** PROGRESS PERSONAL PAGE TEAM PAGE Help

### Contacts

Compose Message Add to Group Delete Email All Search Contacts

Create a new group ...

Individuals Groups

	Name	Groups	Email			Donations
			Sent	Opened	Page Visits	Current
<input type="checkbox"/>	<no name> awong@bc.lung.ca		14 May 15	1 May 15	0	\$0.00
<input type="checkbox"/>	Ashley Wong awong238@gmail.com		3 Apr 07	3 Apr 07	0	\$0.00
<input type="checkbox"/>	Nicole Wong awong238@gmail.com		1 May 19	1 May 19	0	\$5.00

(Select all or none) Contacts/Page: 25 « < 1-3 of 3 > »

Compose  
Drafts  
Sent  
Contacts




1 + Import contacts  
2 + Add single contact

Share

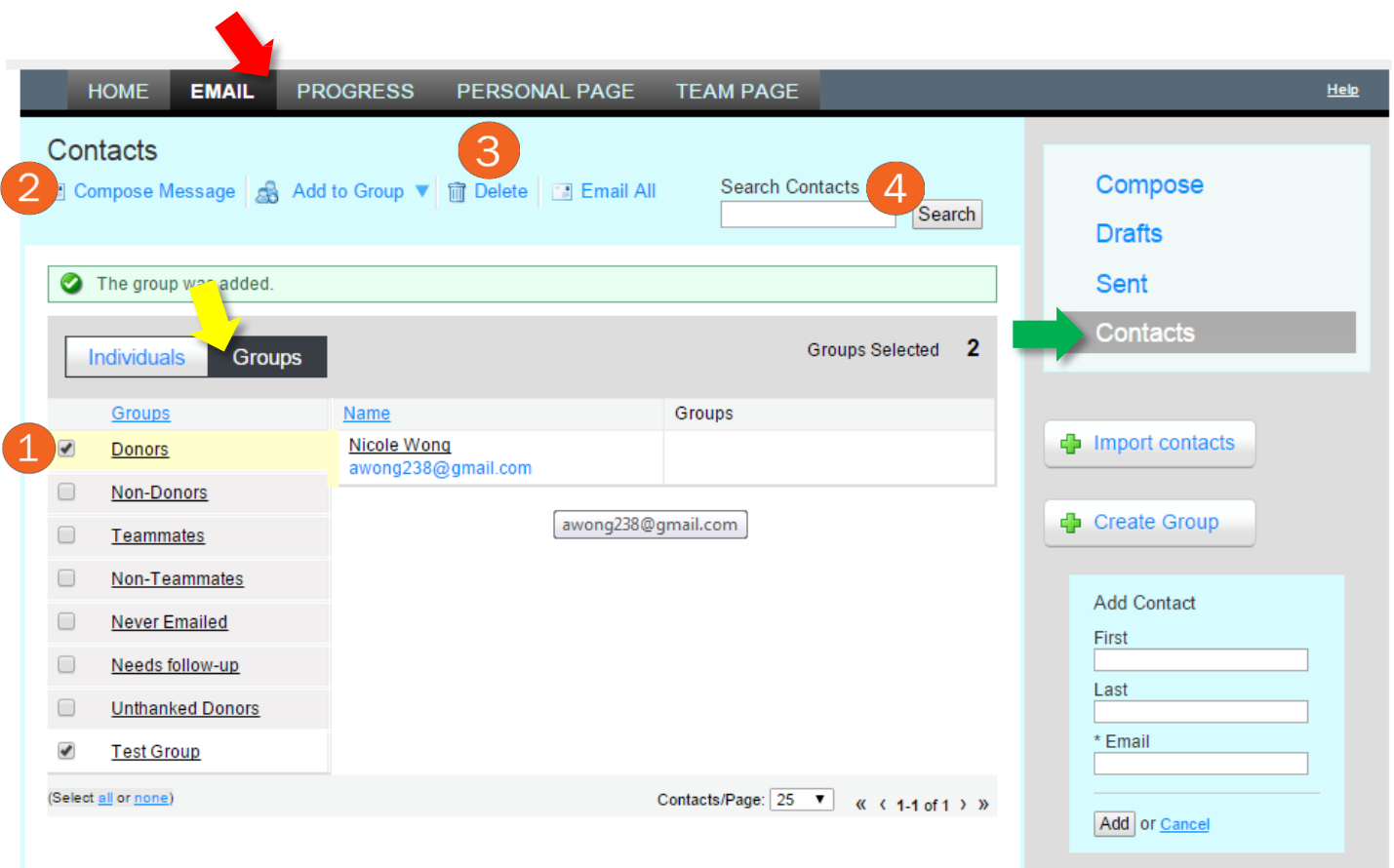


# Email Groups

## 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.




The screenshot shows the 'EMAIL' tab selected in the navigation bar. The 'Contacts' section is active, displaying a list of groups. The 'Donors' group is selected, and the contact information for Nicole Wong is shown. The sidebar on the right contains 'Compose', 'Drafts', 'Sent', and 'Contacts' options, along with 'Import contacts' and 'Create Group' buttons. A 'Add Contact' form is visible at the bottom right.

Groups	Name	Groups
<input checked="" type="checkbox"/> Donors	Nicole Wong awong238@gmail.com	
<input type="checkbox"/> Non-Donors		
<input type="checkbox"/> Teammates		
<input type="checkbox"/> Non-Teammates		
<input type="checkbox"/> Never Emailed		
<input type="checkbox"/> Needs follow-up		
<input type="checkbox"/> Unthanked Donors		
<input checked="" type="checkbox"/> Test Group		


# Progress

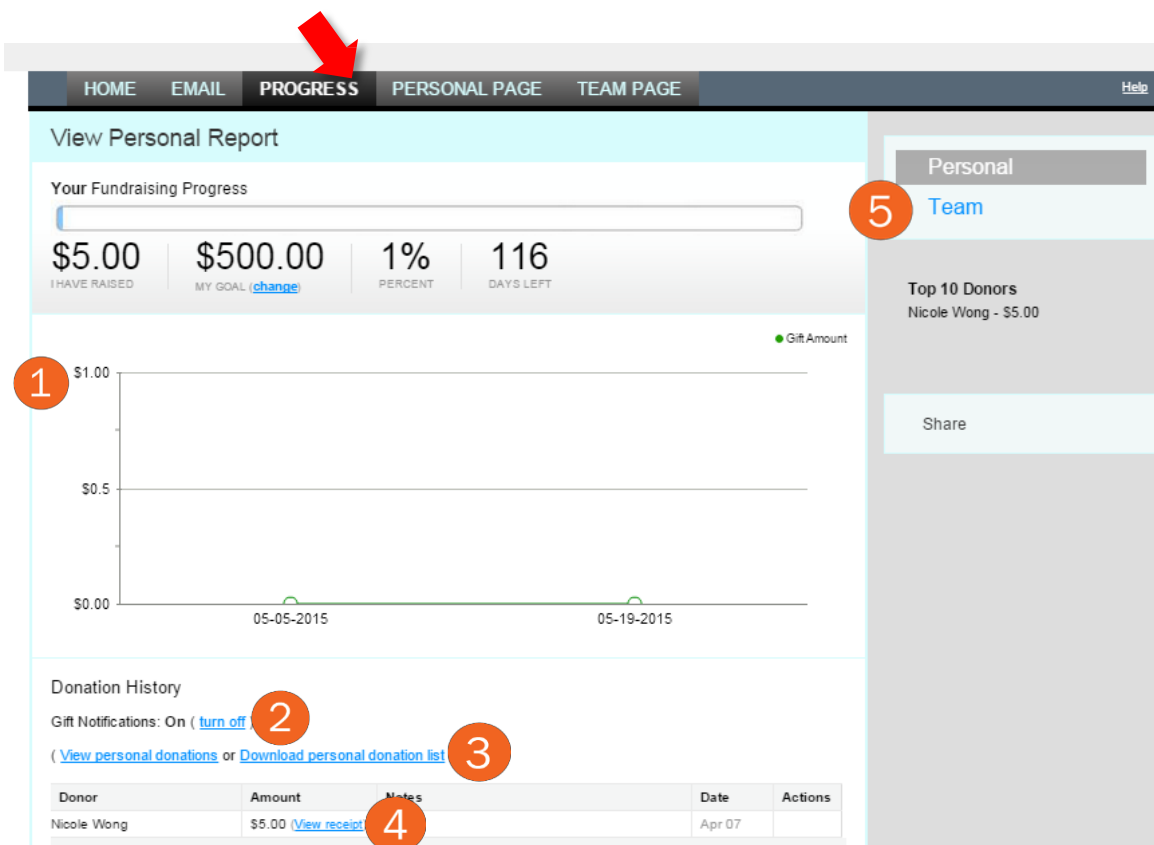
## TRACK YOUR DONORS AND DONATIONS

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.

### Personal Report:

- 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'.

Team Report: To view your Team Progress Report, click . 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.



The screenshot shows the 'View Personal Report' page. At the top, there is a navigation bar with tabs: HOME, EMAIL, PROGRESS (highlighted with a red arrow), PERSONAL PAGE, and TEAM PAGE. Below the navigation bar, the page title is 'View Personal Report'. The main content area is divided into several sections:

- Your Fundraising Progress:** A progress bar showing \$5.00 raised out of a \$500.00 goal, with 1% completion and 116 days left. A red circle with the number 1 points to the progress bar.
- Donation History:** A section with a 'Gift Notifications: On' status and a 'turn off' link (circled with a red 2). Below this are links for '( View personal donations or Download personal donation list' (circled with a red 3). A table below shows a single donation from Nicole Wong for \$5.00 on Apr 07, with a 'View receipt' link (circled with a red 4).
- Right-hand sidebar:** Contains a 'Personal' section with a 'Team' link (circled with a red 5), a 'Top 10 Donors' list (Nicole Wong - \$5.00), and a 'Share' button.

Donor	Amount	Notes	Date	Actions
Nicole Wong	\$5.00	<a href="#">View receipt</a>	Apr 07	

# 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](mailto: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](mailto:trek@bc.lung.ca).

For any other questions, please do not hesitate the Special Events team at [trek@bc.lung.ca](mailto:trek@bc.lung.ca) or 604.731.5864.