



KELOWNA'S GOSPEL MISSION
BIKEATHON

A Quick How-to Guide for Team Leaders,
Riders, and Pledge-a-thon Supporters
who use 30kclubbikeathon.com



Using 30kclubbikeathon.com

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TEAM LEADERS

TEAM LEADER PLEDGE-A-THON FUNDRAISING AREA

Teams have their own fundraising sites, managed by the team leaders. The team leader has access to the site to make changes; all team members can see the site information.

TEAM SITES

Team sites are automatically created when, during the registration process, an individual opts to [Start a Team](#). This participant is then designated to be a team leader, and that participant's password-protected account area includes access to the team fundraising page, to be able to customize it.

All team members can view the team page, but only the team leader can make changes to the name and description. Every time the team adds a new member, the member's fundraising results are added to the team's Web page.

TEAM LEADER REGISTRATION NOTES

When the team leader selects the option [Start a Team](#) they must be the FIRST individual to do so for their team. A team name must be created; as well as a establishing a team fundraising goal and a rider recruitment goal (these can be modified by the team Leader at any time are for interest-sake only). Once these items have been created the team Leader simply continues with the registration as a Rider.

TEAM ACCOUNT AREAS

When a participant logs into their password-protected account area, their team results are listed on the [Team Progress](#) tab, and on the [Home](#) tab summary area. Each member's fundraising efforts are also added to the team progress report so that team members can see the results of all team members, and view their standing in relation to their teammates.

TEAM EMAILS

All team members have the option to send email to their team members or just to the team leader. GiftTool sends to the team members' email addresses used at registration time, without revealing those addresses to the sender. Team members can also use the email tool to send invitations to join the team.

RIDERS

RIDER REGISTRATION NOTES

When the Rider selects the option [Join a Team](#) they must be the FIRST individual to do so for their company. After you've entered your registration information you will need to inform us of your gender, your shirt size, and whether or not you're a team Leader.



USE THE MESSAGE BOARD

Participants can use the message board to stay in touch with their teammates. All messages are sent within GiftTool, so the delivery is reliable, and critical information is certain to reach its destination. The summary of new and total messages can be found on the [Home](#) tab, so participants can easily see if they have new messages to read.

ONE-TIME DONORS AND NON-RIDER SUPPORTERS

DONOR REGISTRATION

If an individual wants to join the fundraising effort without being associated with a team they simply register under the following option: [Join as an individual](#) and then select [I want to make a donation](#).

SUPPORTER REGISTRATION

If you do not want to play in the tournament but you want to help your company's team raise funds then you simply select the [Join a Team](#) option, continue entering your information, and register with the following option [I want to make a donation](#).

MANAGING YOUR ACCOUNT

Every person who registers on the website will have their own pledge-a-thon account. The information that follows provides insight on how best to manage that account in order to have a stress free and successful fundraising campaign.

PASSWORD-PROTECTED PLEDGE-A-THON PARTICIPANT ACCOUNTS

As each person registers, their username and password is saved in the system. Participants use this information as they log in to set up their accounts. When they log in, they will see a summary page that lets them know, at a glance, their goals and their successes to date, for both themselves and their team (if they registered with a team).

Helpful Hint: On the summary page [My To Do List](#) walks participants through the steps of fundraising: setting up their fundraising page, sending email, and managing pledges. This becomes a participant's base, where they can manage their personal fundraising campaigns. Also on the summary page is a [Message Board](#) that teams can use to communicate amongst themselves. This lets teams send messages back and forth without worrying about email getting lost, as it could outside of GiftTool. As the system processes the pledges of participants, they will be able to see their pledge and donation levels rise.



PERSONAL WEB SITES

Participants are encouraged to set up a personal Web page for themselves so that potential donors can easily find them and make a contribution. Personalizing a Web page helps participants make an emotional connection with their friends and family, who are being asked to sponsor the participants during the pledge-a-thon. This is a good opportunity for participants to tell their stories and talk about what makes them passionate about raising money for your organization. Participants can also upload a photo from their computers. In the public view of the personalized Web page, they will see a [Sponsor Me](#) link as well as a progress chart illustrative how close the participants are to the goals they've set.

PLEDGE-A-THON EMAIL TOOLS

After participants have set up their personalized web page, they can invite their family, friends and colleagues to visit their page and support them by making a secure online donation by using the built-in email tool.

MANAGE ADDRESSES

Participants can add as many email addresses as they want. This is a secure area, and GiftTool does not use these email addresses in any way other than to send the email for each participant. As a participant adds contacts to the list, the names are automatically alphabetized by last name, so they are easy to find later on.

SEND EMAIL

Asking for pledge-a-thon support is easy for participants. They are given a choice of four email templates, and each template automatically adds the right type of information to the email. Email can be sent to team members, as well. Because team members will want to discuss topics other than the topics in the templates, a blank email template has also been included.

PARTICIPANTS MONITOR THEIR PLEDGE TOTALS

Fundraisers can monitor their progress through their password-protected area. If part of a team, participants can also track their team's progress.

Unlike going to their personal Web site, where a summary is shown, logging into their account area gives them detailed information about their activities and progress. On the [My Progress](#) tab, participants can see all the pledges they've input, categorized by pledge status, and check information on the pledge forms they've submitted. The information cannot be changed, and no credit card information is shown to participants.

COLLECTING AND PROCESSING PLEDGES

When fundraisers collect pledges, the pledges can be added to their online pledge form or, if that's not practical, participants can print a blank pledge form. Prior to the event, participants must enter their pledges online, before sending them in for processing. The amount of funds collected won't be shown on a participant's site until the pledges have been processed in the GiftTool Back Office.



Note: When supporters give online and pay by credit card, it is a donation (the money has actually been received), not a pledge (a promise to give money). This amount is reflected on the site immediately upon donation. Credit card statements will display the transactions as follows:

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ONLINE PLEDGES

The participant can fill in their pledges online by going to their password-protected area and filling in the online pledge form. The participant can submit the form for processing after receiving one or more pledges. Tracking pledges is easier if the online pledge form matches the pledge forms sent in for processing.

OFFLINE PLEDGES

When it makes more sense for a participant to use a paper form to collect pledges, they can print off a form from their password-protected area and manually fill it in as they gather pledges. Once they have collected their pledges, participants must then log-in to their account, enter the donors' information, print a new form, and then submit the completed paper form along with the cash or cheques.

To print off your pledge form:

1. Log into your account and select the "Record Pledges" tab on the top menu
2. Select the "Blank Pledge Form" text hyperlink, then print that web page file

To record pledges in your account:

1. Log into your account and select the "Record Pledges" tab on the top menu
2. On the bottom of that window select "[+] Add a Pledge"
3. Enter the pledges information and select "Record Pledge"
4. Prior to the event date you should login to the "Record Pledges" section, select "Close & Print Pledge Form" and bring that form (and the actual funds) with you so it can be processed (and tax receipts sent)

MONITORING PLEDGES

Participants can monitor their success by viewing reports of both confirmed and pending donations. Once the online pledge form has been sent in, the pledges are moved from the Record Pledges tab to the My Progress tab and listed by status. Once the pledges are processed in GiftTool's back office, they are visible on the participant's summary page and on their public Web site. If a participant submits a paper pledge form without entering the information into their online pledge form, the pledges must be processed manually, and their sites will not reflect those pledges until they are entered into GiftTool.

Please note: this very situation is an administrative issue for the Hoop-Law Society and we ask that participants only submit pledge forms that have been recorded online.



MORE HELP

If you feel this document doesn't provide you with the answers you need please feel free to search the [GiftTool Help Site](#). If additional assistance is required please e-mail us at bike@30kclub.com.