FUNDRAISING GUIDE

How to Use Your Fundraising Account

HAKU GUIDE

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Contents

Dashboard Tab

View an overview of how much you've raised and how much remains to reach your goal. You'll also see recent fundraising activity, helpful tips to boost your fundraising, and Quick Actions for sharing your page through social media, email, or text. You can also copy your page links or download scannable QR codes.

Public Page Tab

Customize the fundraising page you'll share with potential donors. Add a banner image and profile picture, update your fundraising goal, write a description explaining why you're fundraising, post updates, and personalize your page URL.

Donations Tab

View and track all the donations you've received. Stay up to date when new donations arrive and send personalized thank-you messages to your donors directly from this tab.

Campaigns Tab

Create and send fundraising messages directly from your account, then track the donations generated by each campaign. Add recipients individually or upload a CSV containing their names and contact information to quickly reach potential donors.

CHAPTER ONE

Introduction

Welcome to your **Fundraising Account Guide!**

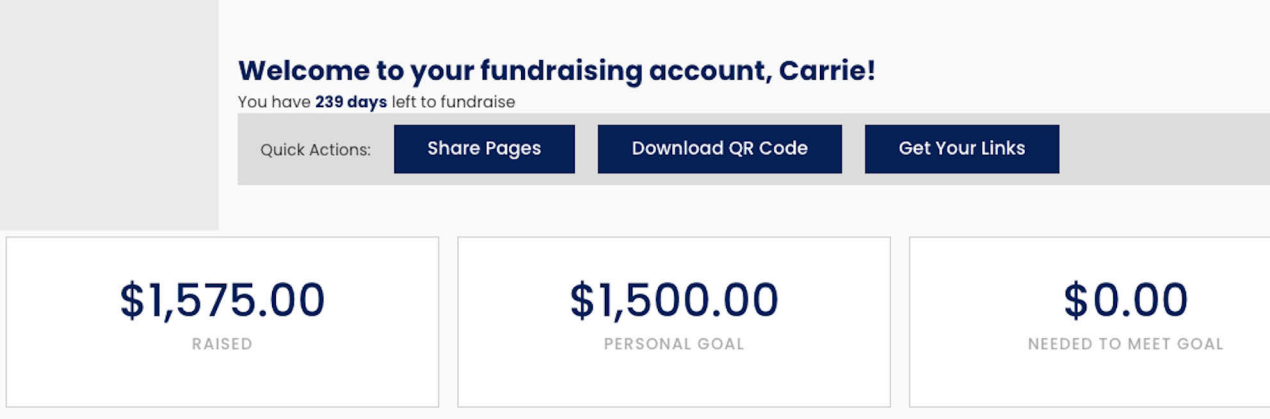
This guide is designed to help you navigate and manage your fundraising account with confidence. Inside, you'll find step-by-step instructions and visual references showing you how to customize and manage your fundraising page, share your fundraising or donation page link, track donors and donations, send email campaigns, and promote your pages.

Whether you're setting up your page for the first time or managing an active fundraising campaign, this guide will help you easily find and use the tools available within your fundraising account.

CHAPTER TWO

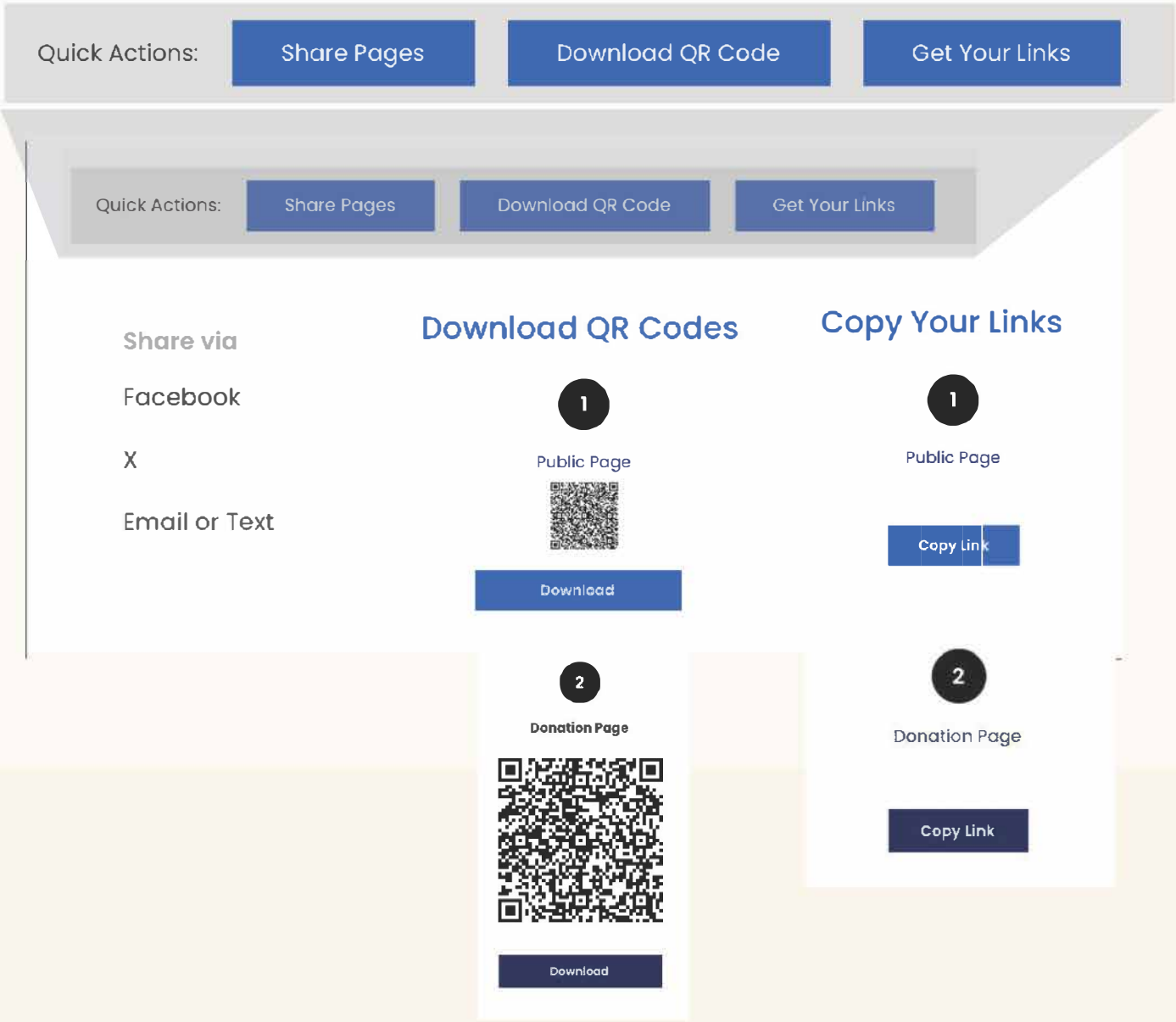
Dashboard

Once logged in, you will land on your Dashboard, which provides a quick overview of your charity program. From here, you can see your total allotted entries, how many participants have registered, and an overview of your fundraising totals and leaderboard. You'll also see your most recent registration activity, giving you a real-time snapshot of your team's engagement.



Within the "Quick Actions" section of your dashboard, you'll find several tools to help promote your fundraising public page. You can:

- Share your page directly to social media platforms like X (formerly Twitter) and Facebook.
- Share via text or email to engage supporters directly.
- Download a scannable QR code for use on social posts, signage, or flyers.
- Use the "Get Your Links" button to easily copy and paste your donation or public page link.


Quick Actions:
Share Pages
Download QR Code
Get Your Links
Quick Actions:
Share Pages
Download QR Code
Get Your Links
Share via
Facebook
X
Email or Text
Download QR Codes
1
Public Page
Download
2
Donation Page
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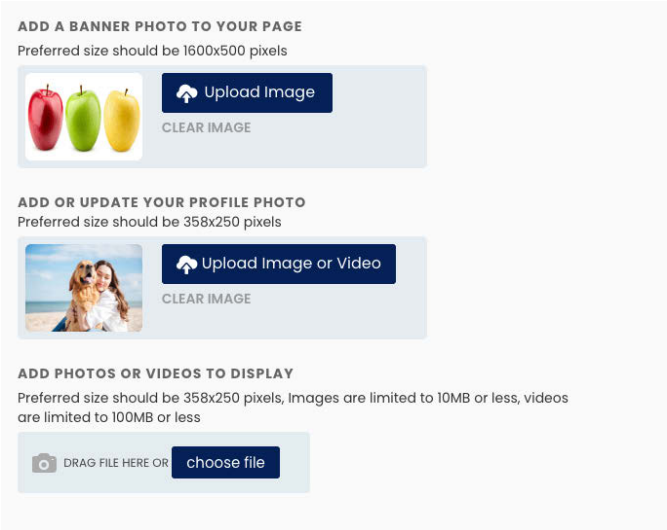
CHAPTER THREE

Public Page Tab

The Public Page tab is where you can customize the fundraising page you'll share with potential donors. Add photos, explain why you're fundraising, set your goal, post updates, and personalize your page URL.

Customize Your Page Images

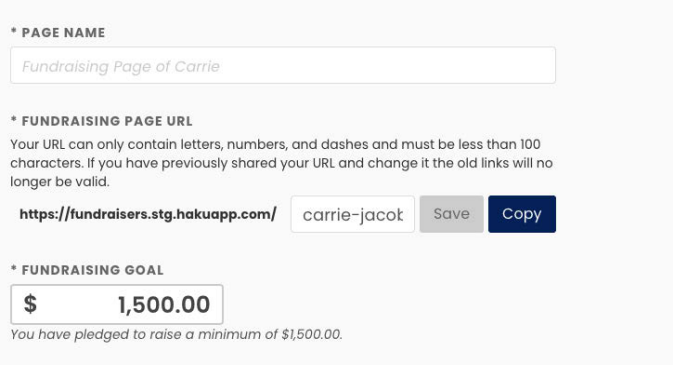
Add a banner image, profile photo, and additional photos or videos to make your fundraising page more personal and engaging.



Update Your Fundraising Page Details

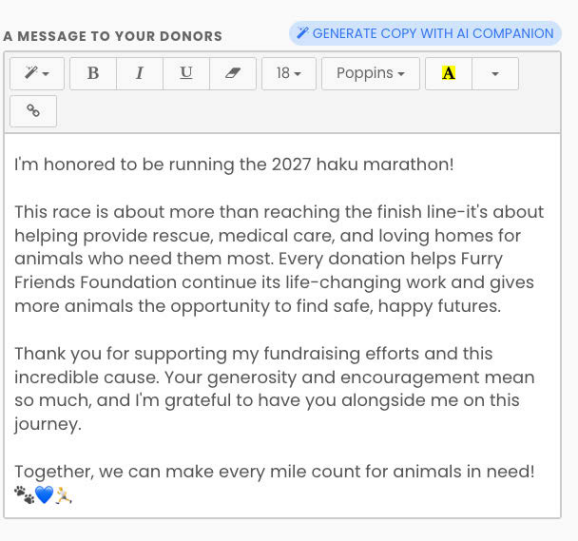
Personalize your page name and fundraising page URL. You can also update your fundraising goal to show donors how much you're working to raise.

Important: If you change a URL you have already shared, the previous link will no longer work. Be sure to share your new link with potential donors.



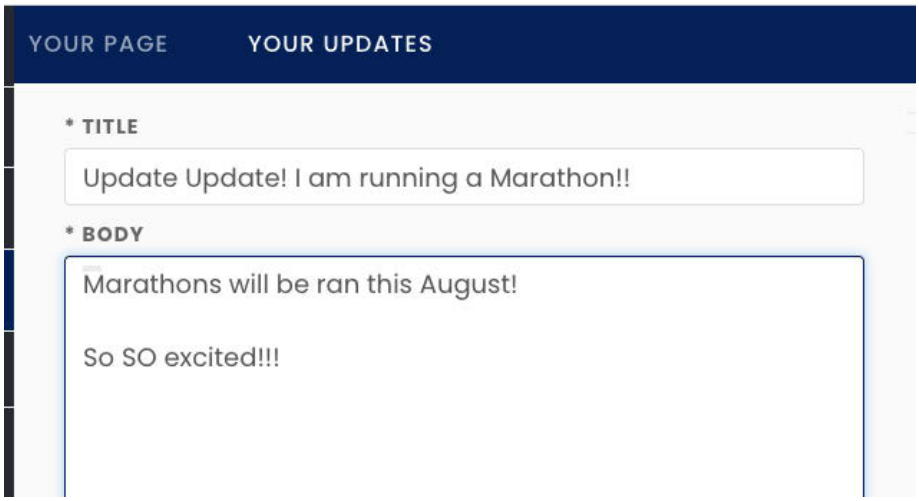
Add a Message for Your Fundraising Page

Share why you're fundraising, explain the impact donations will make, and thank visitors for supporting your efforts. You can write your own message or use the AI Companion to help generate copy.



Fundraising and Training Updates

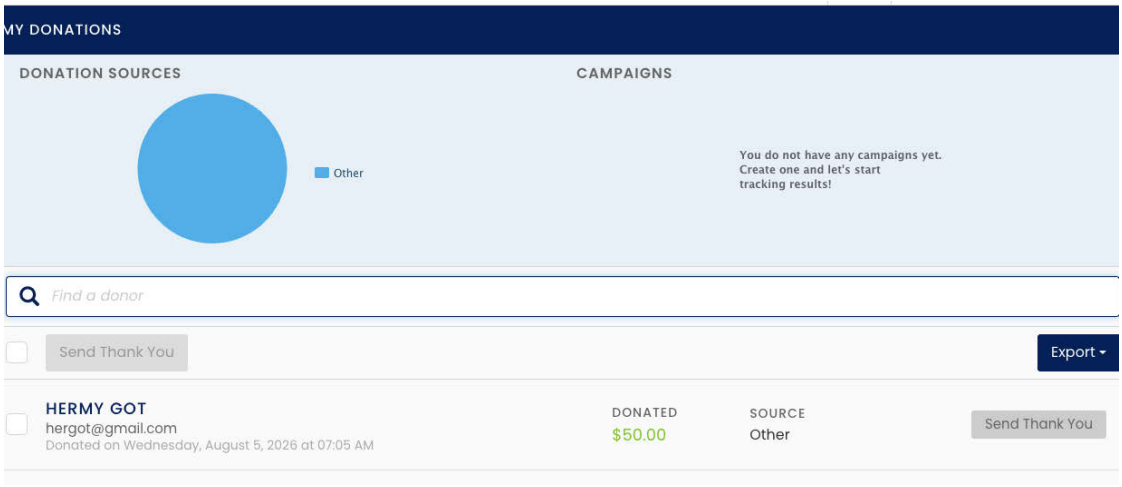
Use the Your Updates section to share fundraising progress, important milestones, event preparation, or other news with your supporters.



CHAPTER FOUR

Donations Tab

The Donations tab allows you to view and track the donations made to your fundraising page. Here, you can see each donor's name and email address, donation date, donation amount, and the source of the donation.



Find and Track Donors

Use the search bar to locate a specific donor. The Donation Sources and Campaigns sections provide an overview of where your donations came from and help you understand which outreach efforts generated results.

If you need to review your donation information outside your account, select Export to download your donor data.

Send Thank-You Messages

Send personalized thank-you messages directly from your fundraising account by selecting Send Thank You next to a donor's name. To thank multiple donors at once, select the check boxes beside their names, then select Send Thank You at the top of the list.

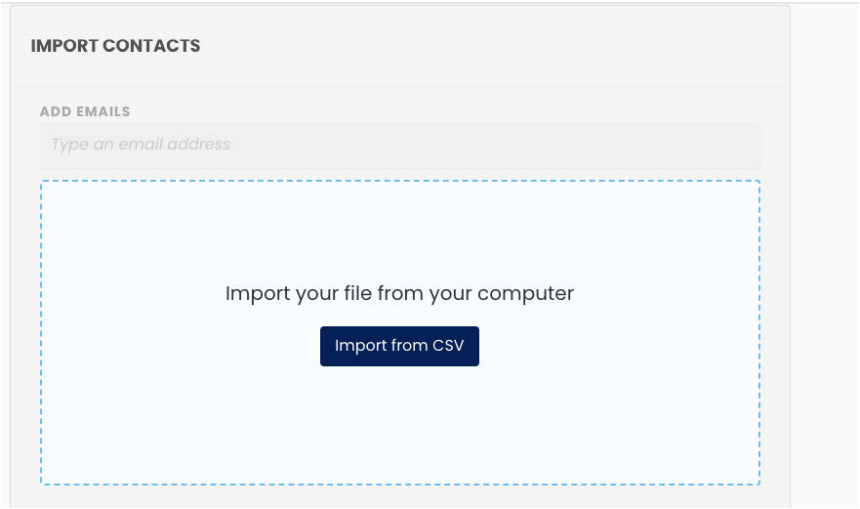
CHAPTER FIVE

Campaigns Tab

The Campaigns tab allows you to create and send fundraising emails directly from your fundraising account. Use campaigns to ask for donations, share your fundraising story, and encourage friends, family, and other contacts to support your efforts.

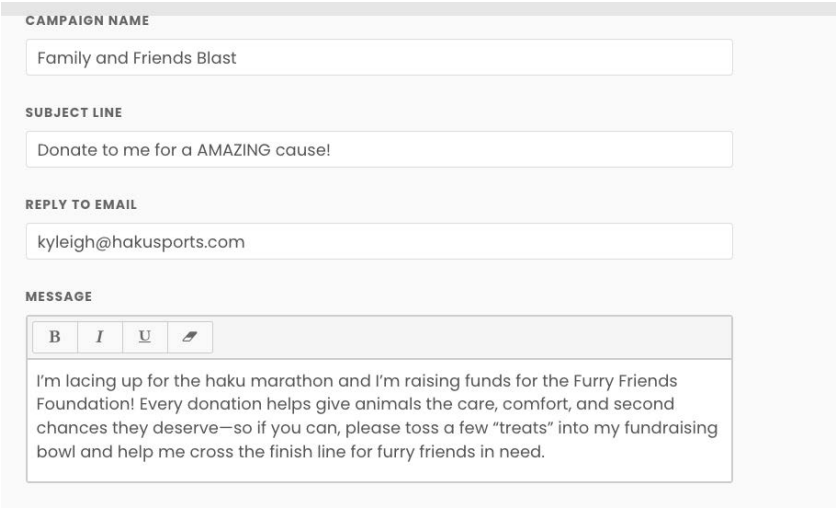
Add Your Contacts

Enter recipients' email addresses individually or select Import from CSV to upload multiple contacts from your computer at once.



Create and Send a Campaign

Select Create New to begin a campaign. Add your contacts and create a personalized message explaining why you're fundraising and how their support can make a difference. Your message will include a link that allows recipients to visit your page and donate.



Final Notes

Your fundraising account gives you the tools needed to personalize your page, connect with potential donors, track your progress, and thank your supporters—all in one place.

Keep your page updated, share it regularly, and use campaigns to stay connected with your network throughout your fundraising journey. Remember to thank your donors and celebrate your progress along the way!