bike MS

*It's more than a ride*

2017 PARTICIPANT CENTER

guide

CONTENTS

THE PARTICIPANT CENTER MAKES FUNDRAISING A BREEZE. UTILIZE THIS GUIDE TO MAXIMIZE THE TOOLS AVAILABLE.

TABLE OF CONTENTS:

HOW TO LOG IN:

1. Visit MScycling.org
2. Click 'Sign In' located in the top right corner of your screen
3. Enter your username and password
4. Click "My Events" from the drop down menu
5. Select the event you wish to manage
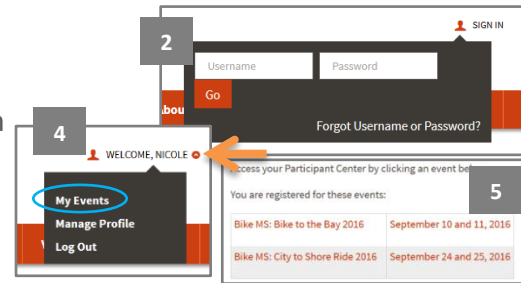
I forgot my Username and Password.
Click 'Forgot Username and Password' to have it sent to you or contact Bike MS staff for assistance
How do I change my Username and/or Password?
Once you have signed, click "Manage Profile" in the drop down under 'Welcome, *Your Name*'
I rode last year, but my saved information does not show in this year's account.
You must register using the same username/password and email from last year to see your saved information. If you think you registered with a new username/password or email this year, contact Bike MS staff for assistance.

PARTICIPANT CENTER RESOURCES

Once logged in, from your Home page, you can begin to track your donation progress, personalize your personal page, send e-mails, and much more.
*'Team' features are only visible if you are a Team Captain.*
Team captains: reference pages 13-15 for Team Captain features and instructions.

The **'What to Do Next'** checklist will help guide you through the Participant Center resources and ensure you are maximizing the tools available.

✓   A checkmark will appear next to each item as you complete the task.

Click directly on the checklist item, or expand the drop down menus across the top of the page, to begin. Continue reading for specific directions pertaining to each tool available.
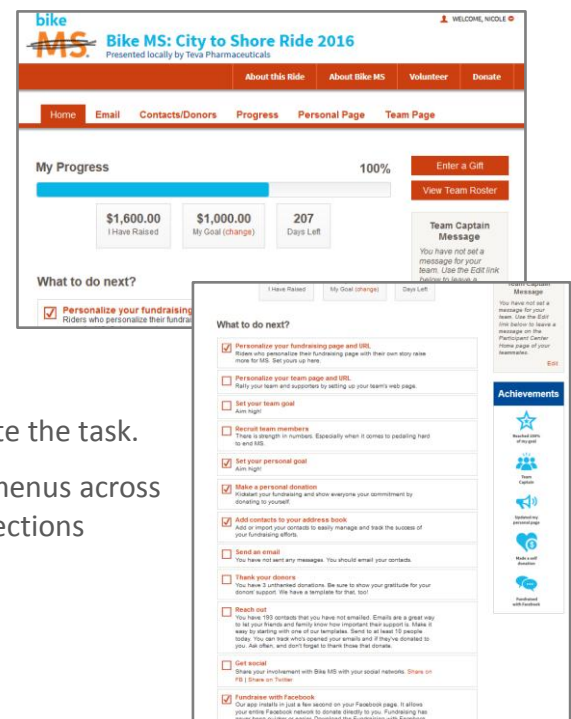
UPDATE YOUR GOAL

You only need to raise $300 to get your rider number, but aim higher. Raise $1,000 to take advantage of all the VIP Club perks. Setting a goal will help your donors know what you are striving for.

On the Participant Center Home page, your **FUNDRAISING GOAL** will be shown. If at any time you need to adjust your goal click 'change' to update it.
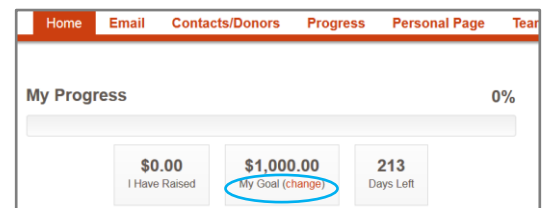
UPDATE YOUR PERSONAL PAGE & CREATE A PERSONAL URL

Those who SET UP and ACTIVELY UPDATE their Personal page raise on average two to three times more than those who don't!

GET STARTED: Click 'Personal page' at the top of your tool bar on the Home page.

CREATE A PERSONAL URL: Click 'Personalize', type your new URL code, then click 'Save.' Your updated URL will be displayed so you can copy and paste it into personal e-mails or social networking sites.

DRAFT YOUR MESSAGE: Update the body of your page as well as font styles, sizes and colors with the toolbars provided. When your message has been updated, click 'Save.'

Personalize the provided content to explain why you are participating and why your donors should support you.

>> TIP: Draft & save your content in Word. Copy & paste into the body of your page.

ADD A PHOTO: Click 'Photos/Videos' on the right, to upload an image or a video to your profile. JPEGs & verified YouTube links only.

>> TIP: Resize your image in Paint to fit the size restrictions.

PERSONAL BLOG: Click 'Components' to enable a personal blog visible on your page. Click 'Save'.

Keep donors updated on your training, fundraising and preparation for the Ride!

VIEW PERSONAL PAGE: View your page as the public would. Click 'Content' on the right hand side, and 'View Personal Page' above the URL.
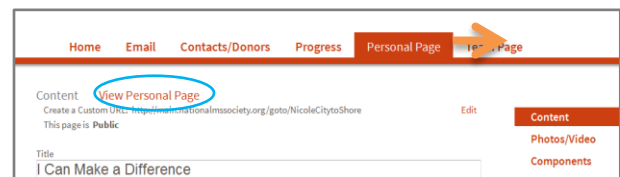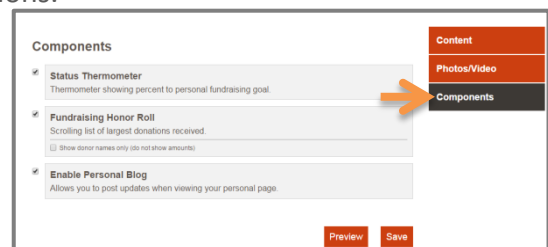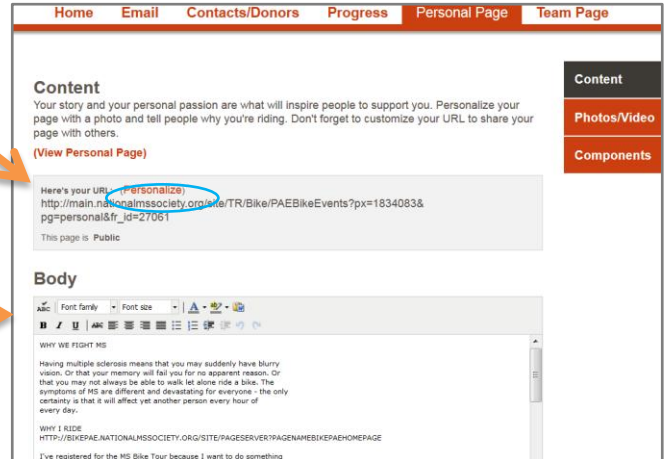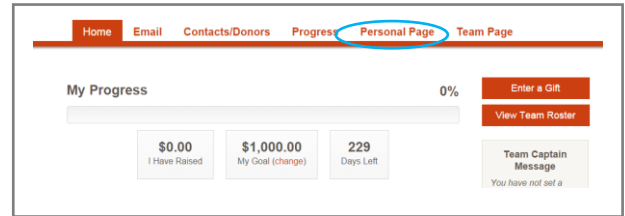
SENDING AN EMAIL: BENEFITS & RESOURCES

There are many benefits to sending an email in the Participant Center!
✓ Emails automatically include hyperlinks to your personal page and your team's page.
✓ Emails will include a Bike MS header.
✓ Emails are designed to highlight the event you're participating in and information to learn more about the National Multiple Sclerosis Society.
✓ Solicitation emails include details about the impact donations have for those living with MS.
✓ Create emails groups, making it easier to select a preferred audience.
✓ There are multiple email options to choose from.

THANK YOU (thanking donors is an important part of fundraising)
RECRUITING (ask others to join you or your team)
SOLICITATION (invite contacts to donate and help you reach your goal)
OTHER (create a customize email based on your needs)
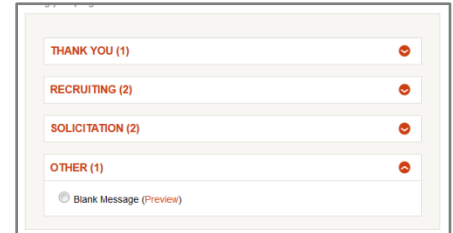
SENDING AN EMAIL: COMPOSE MESSAGE

Click 'Email' at the top of your tool bar on the Home page. Select a pre-drafted message, reuse a template you previously created or create your own message (see below) and click 'Next.'

The subject line will automatically populate for each template

CREATE YOUR OWN MESSAGE: Select "Other" and 'Next.' Type your text into the space provided and insert the 'Subject'. Click 'Save as Template' to use this email again at a later time.
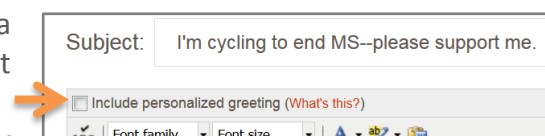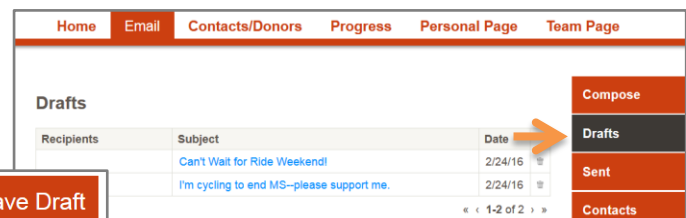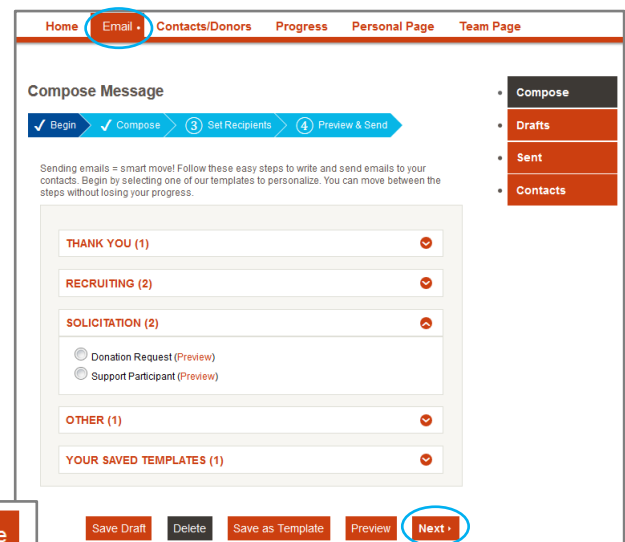"Click Next to select your recipients"
>> TIP: Draft & save your content in Word. Copy & paste into the body of your page.

SAVE A DRAFT: Can't complete your email right now? No problem. Click 'Save Draft' at the bottom of the page. Click 'Drafts' on the right, and select the email you wish to finish and send.

PERSONALIZE YOUR GREETING: Check this box to activate a personal salutation. Click 'What's this?' to learn more about this option. Reference SENDING EMAILS: ADDING AND IMPORTING CONTACTS section on page 7 for instructions on adding first name & last name to your contacts.

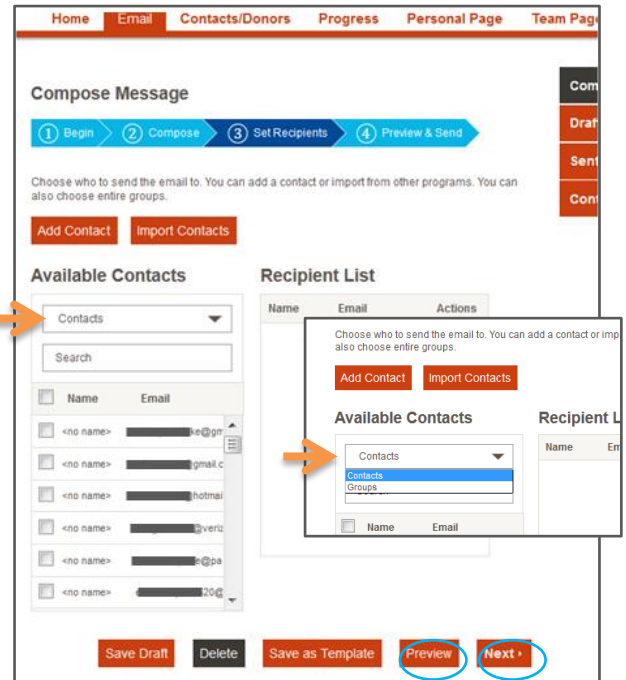## SENDING EMAIL: SELECT RECIPIENTS, PREVIEW & SEND

Now that your message is composed, click 'Next' to select the recipients you wish to send your email to.

Utilize the drop down under Available Contacts to select if you would like to send your email to particular individuals (Contacts) or a predetermined group (Groups).

✓ Check 'Name' to select all individuals or groups

Reference the section below for details on adding and importing contact.

Click "Next" or 'Preview' at the bottom of the page to view your drafted message and review content.

Review your email to ensure all content is accurate and ready to send.

If you need to made edits, click 'Compose' on the blue tool bar to revert back to your drafted message.

If you a re ready to send to your selected recipients, click 'Send.'

SENDING EMAILS: ADDING & IMPORTING CONTACTS

Click 'Contacts/Donor' at the top of your tool bar on the Home page.

Import/Add Contacts: choose to import contacts or add each individually

Import Contacts Allows you to have the system pull your contacts from your AOL, GMAIL, Yahoo and other e-mail accounts. Click 'Import Contacts' and follow the prompts. Click 'Tell me more' for more details and information on uploading your contacts using a .CSV file.

>> TIP: you will be prompted to choose your e-mail provider and then enter your email address and your password. This information will **not** be stored. The system will only use it to access your account to pull contacts.

Add a Contact **MANUALLY** add contacts **INDIVIDUALLY** by typing each person's First name, last name and email address.

Click 'Add a Contact' on the right. A window will appear, allowing you to enter the contacts first and last name, and their email address. Click 'Add' and you will see them appear in your list.

Edit Your Contact Information: Ensure your address book is complete by adding first name & last name to each individual.

Select 'Individuals', click on <no name>, or the contacts name current indicated, above their email address.

A new page will open with the contacts total donated, page visits, percentage of opened emails and more. Click 'Edit Information' to edit contact information. **Reminder: entering donations yourself can falsely represent your fundraising total.** Reference UNDERSTAND FUNDRAISING TOTAL & DONATION HISTORY section on page 10 for details.
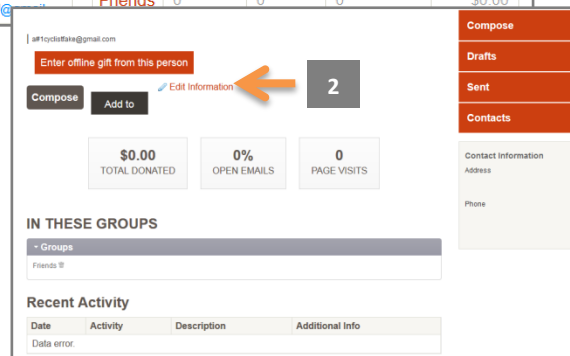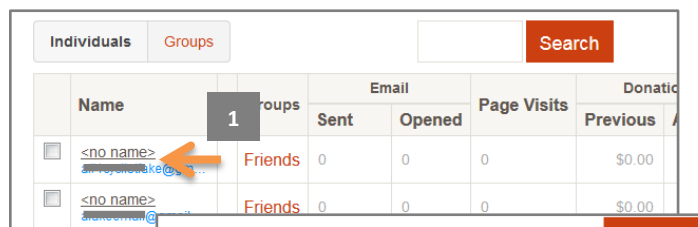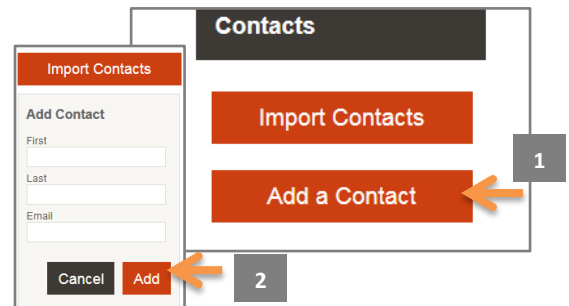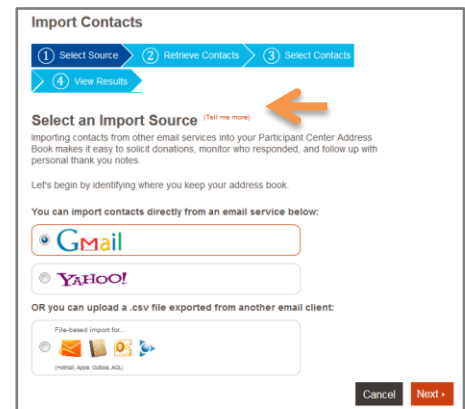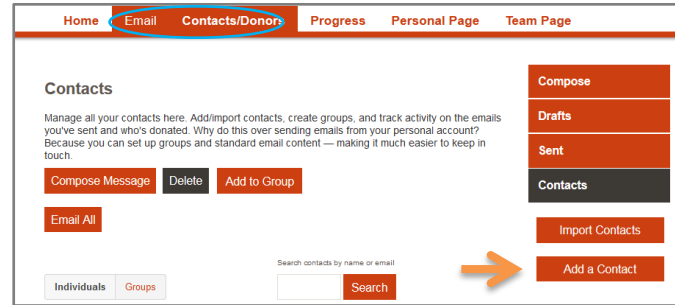
## SENDING EMAILS: ADDING & IMPORTING CONTACTS CONTINUED

Utilize Groups: Groups allow you to send emails to specific targeted audiences such as donors, past donors and more.

Click 'Groups' to view your list. Contacts automatically get placed into groups based on the activity in your account. Viewing these groups is also a great way to manage your account activity and follow up. You can also create groups.
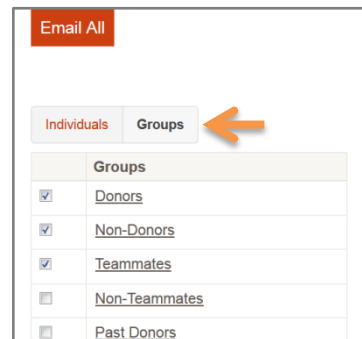
CREATE A GROUP: Click 'Add to Group' and 'Create a new group…' from the drop down. Insert the name of the group you wish to create in the screen that appears. Click 'Submit'.

Once created, a message will appear at the top of your screen noting the group was successfully added, and your group will appear in your group list (see steps below).
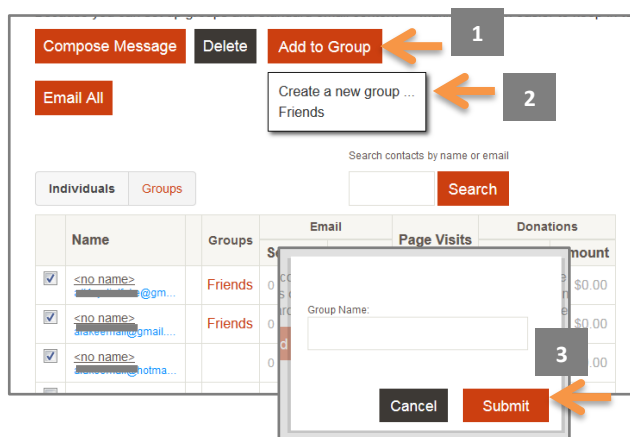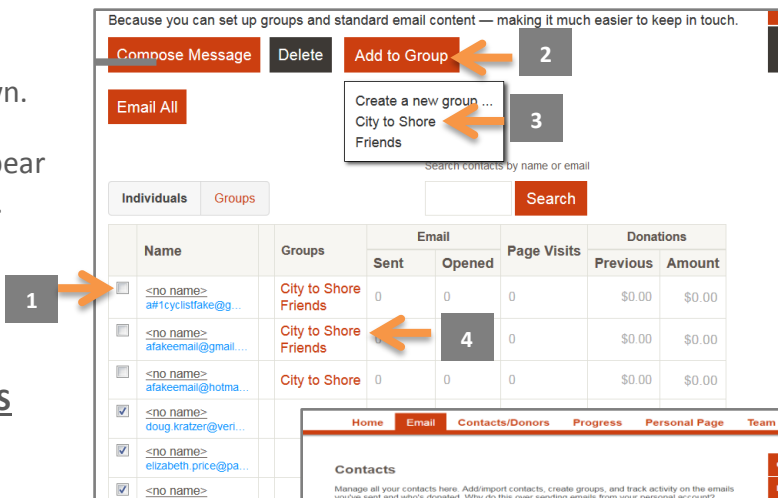
ADD INDIVIDUALS TO A GROUP:
Check the box next to the individual's name, of all individuals you wish to add to a particular group.
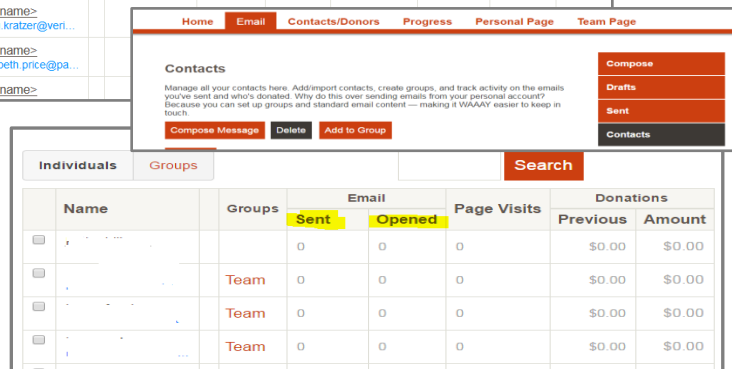
Click 'Add to Group' and select the appropriate group from the drop down.

You will then see the group name appear next to that particular contacts name.

TRACK WHO HAS READ YOUR EMAILS OR VISITED YOUR PAGE:
Before sending out your next email, track who has read your email and visited your participant center page.

TRACK YOUR FUNDRAISING PROGRESS & DONATIONS

From your Home page you can view your overall progress and Recent Activity.

Click 'Progress' in toolbar on the top of your Home page for a more in depth look at your donation history, to download your donation list, view and download/print donation receipts, turn gift notifications 'on' or 'off and much more.

TRACK YOUR PERSONAL PROGRESS:

See how much you have raised*, percentage to goal ratio and how many fundraising days remain. Reference Understand Fundraising Total & Donation History below.
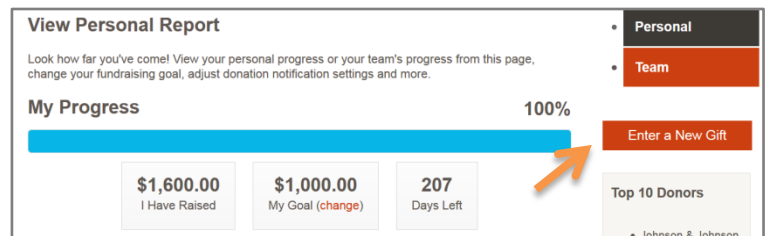
ENTER NEW OFFLINE GIFTS:

Enter a New Gift   Allows participants the option to enter offline gifts (such as checks or cash). Although participants have the option to enter offline donations themselves, and these donations will appear in your total raised, **entering donations yourself can falsely represent your fundraising total.** Reference Understand Fundraising Total & Donation History below for details.

> *Bike MS must have physically received your donations for them to actually count toward your fundraising rider numbers, prizes, VIP status, long sleeve t-shirt, etc.)****

VIEW RECENT ACTIVITY

Scroll to the bottom of the page for a quick reference of donations received, emails sent, etc.

VIEW & MANAGE DONATION HISTORY:

Scroll to the bottom of the page to view your donation history and specifics.

TURN GIFT NOTIFICATIONS ON/OFF:

Allows you to receive an e-mail notification each time a donation is made. If this feature is turned OFF you will not receive notification of a gift/donation made to you.

DOWNLOAD PERSONAL DONATION LIST:

Contacts and saved e-mails <u>WILL</u> carry over annually, however **donation history will <u>NOT</u> carry over**. Click 'Download Personal Donation List' by the end of December to save a copy for your records. An excel file will begin to download on your computer.

TRACK YOUR FUNDRAISING PROGRESS & DONATIONS CONTINUED

<u>UNDERSTAND FUNDRAISING TOTAL & DONATION HISTORY:</u>
*Total amount raised will reflect 'offline unconfirmed gifts' and 'unconfirmed matching gifts.'
ONLY <u>CONFIRMED</u> gifts count toward your required minimum $300.

- ✓ Bike MS must receive your donations for them to be marked 'confirmed' and officially count toward your fundraising total.

- ✓ 'Matching' gifts marked 'unconfirmed' DO count toward fundraising prizes and VIP status, but do NOT count toward the required $300 minimum. Once the check is received from the matching gift company, the donation will be marked 'confirmed'

Donation History

Gift Notifications: **On** (turn off)

(View all personal donations or Download personal donation list)

Donor	Amount	Notes	Date		Actions
Nicole Lewis	$100.00 (cash)		Feb 25	Offline Unconfirmed	
Nicole Lewis	$300.00 (cash) (View receipt)		Feb 25	Offline Confirmed	
Matching Johnson & Johnson	$600.00 (cash) (View receipt)		Feb 25	Offline Confirmed	
Matching Johnson & Johnson	$600.00 (cash)		Feb 25	Offline Unconfirmed	
				« ‹ **1-4 of 4** › »	

- ✓ We must have received your required ('confirmed') minimum $300 by Ride morning to participate, but you have until October 31 to continue fundraising and qualify for prizes and VIP status.

>> TIP: Turn in all donations immediately.

>> TIP: Visit the Ride's News & FAQ page for more information on turning in donations, and more information and explanation regarding the donation and matching gift process/policy.

>> TIP: Track your offline donations mailed to Bike MS using our pledge sheet

DONATION FOLLOW UP

<u>THANK DONORS</u>:
Donors return to Bike MS annually because participants are so thankful of their donations! Utilize the Recent Activity section at the bottom of your Home page or

Recent Activity			
Date	Activity	Description	Additional Info
Feb 25	DONATION	You donated $100.00 Cash	Send a thank you message
Feb 25	DONATION	You donated $300.00 Cash	Message sent

Progress page to see who recently made a donation. Click 'Send a thank you message' and reference the SENDING EMAILS section on pages 5-8 for further instructions.

<u>FOLLOW UP WITH THOSE WHO HAVE NOT DONATED:</u>
Follow-up is the most important part – people forget! Compare compare who you have solicited vs. who has donated in Recent Activity. Every few weeks, call or email those who have not yet donated. Remind them of your fundraising goal and reason for riding. Reference the SENDING EMAILS section for further instructions

<u>SEND RECEIPTS TO YOUR DONORS:</u>

Donors will receive an email after submitting their donation. You can also download and save a PDF receipt from the Donation History section on your 'Progress' page *(reference image at top of this page).*

EMAIL SIGNATURE LINE BADGE

In addition to the email tools available in your Participant Center, you can also spread the word of your involvement and fundraising progress by adding a badge to your work and/or personal emails.

INSTALL THE BADGE:

Scroll to the bottom of the Home page to 'Email signature.' The process to install the email badge varies depending on the email client you are using, as well as whether you are using a PC or a Mac. Click the appropriate 'instructions' link on your Home page or here

WINDOWS   **MAC**

GET STARTED:

Once you have installed the email badge to your signature, simply begin sending emails. The badge will be included and automatically…

✓ Display your fundraising goal with progress updates.
✓ Include a button directing to your donation page or personal page.
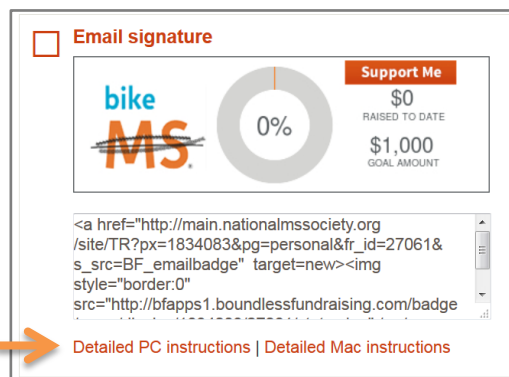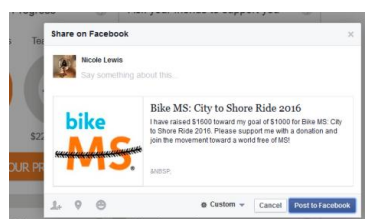
FUNDRAISE THROUGH FACEBOOK

With the Bike MS Boundless Fundraising application, any Bike MS participant with a Facebook account can extend their fundraising effort to their social network on Facebook. Reference the MOBILE/TABLET APPLICATION (FUNDRAISE ON THE GO) section on page 13 to learn more about implementing your Facebook fundraising from your smartphone or mobile. For more social media tips and tools, check out the **Social Media Guide** on Bike to the Bay or City to Shore's Fundraising Tips & Tools page.

INSTALL THE APPLICATION:

Scroll to the bottom of the Home page to 'Fundraise with Facebook.' Click on 'Fundraise with Facebook' icon. Your Facebook page will open *(you may need to log into your Facebook account)* allowing you to begin!

✓ Keep track of your fundraising progress and share the news with your Facebook friends.
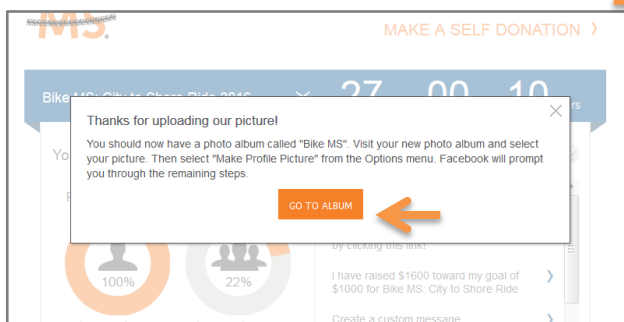✓ Post messages for your Facebook friends to see and to solicit donations from them.
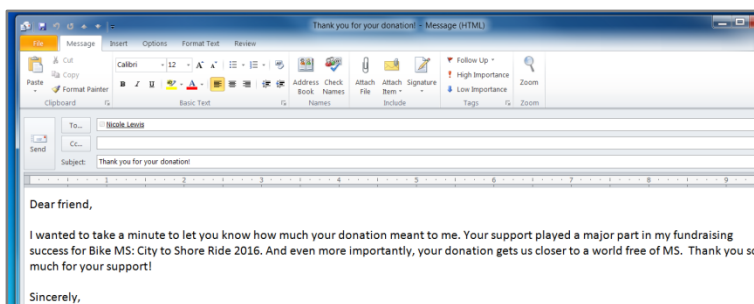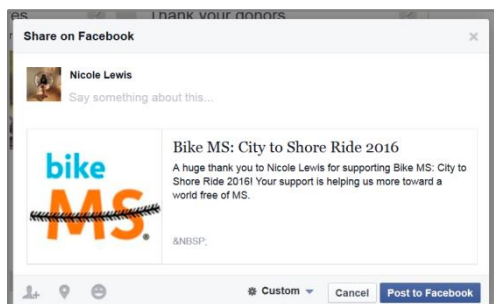
FUNDRAISE THROUGH FACEBOOK CONTINUED

✓ Schedule automatic posts to be sent on your behalf
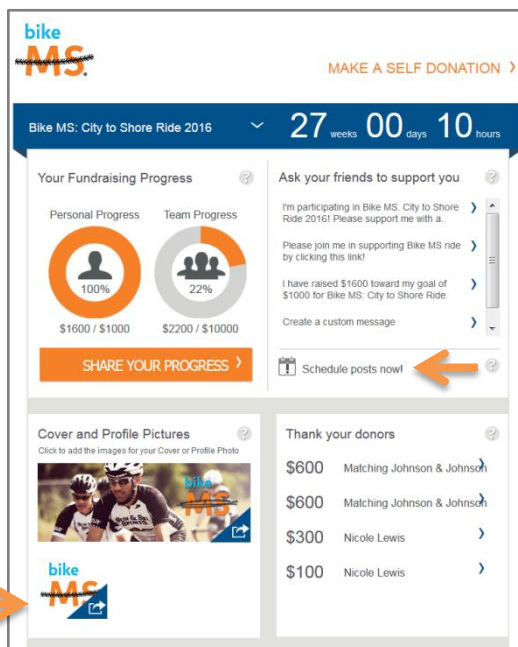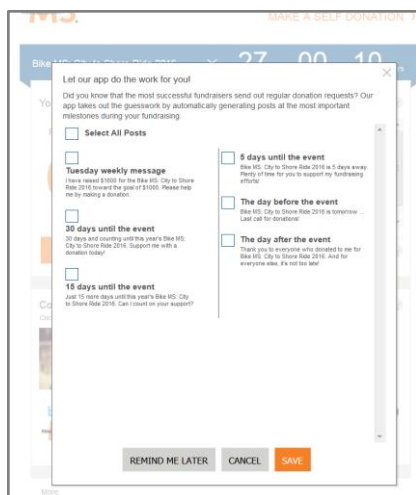
✓ 'Donate' your profile and cover photos to match your event

✓ View your non-anonymous donors and thank them publically via Facebook post, or privately via email

MOBILE/TABLET APPLICATION (FUNDRAISE ON THE GO)

Fundraising just became easier – and at your fingertips! The Bike MS Participant Center app is available for iOs (IPad, IPhone, IPod touch) and Android.

DOWNLOAD THE BIKE MS MOBILE APP: VIA YOUR PARTICIPANT CENTER

From your mobile device or tablet, open the email you received upon registering, or log in to your Participant Center and scroll to the bottom of the Home page to 'Go mobile.'

Click on the desired store based on the device on which you wish to install the app. This will take you directly to the fundraising app where you can continue the downloading process based on your device.

You can also search for our apps directly in the app stores by searching for "Bike MS."

>> TIP: Before completing the download, please be sure you are selecting the correct app for the device (i.e. confirm you are downloading the mobile app and not the tablet app onto your mobile device). Typically, the tablet apps are indicated with a "." at the end of the app name.
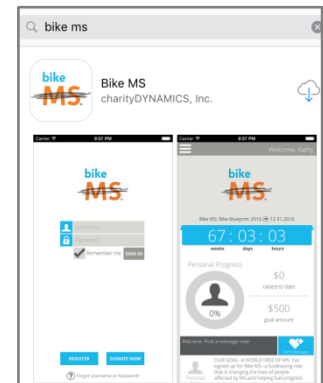
LOG IN:

Use your Participant Center login credentials to sync your application to your Participant Center.

>> TIP: Click 'OK' to accept or decline 'push notifications.' This will allow you to receive alerts for new donations, etc.
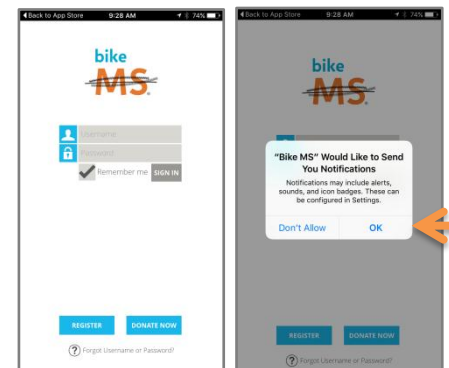
GET STARTED:

- ✓ View your fundraising progress and visit the ride webpage
- ✓ Post/send messages to solicit donations through Facebook, Twitter, SMS, LinkedIn, text and email. All messaged are accompanied by a link to your donation or personal page.
- ✓ View and thank your donors through Facebook, Twitter, SMS, LinkedIn and email.
- ✓ Edit content + upload an image to your personal page, as well as view and share it on Facebook.
- ✓ And much more!
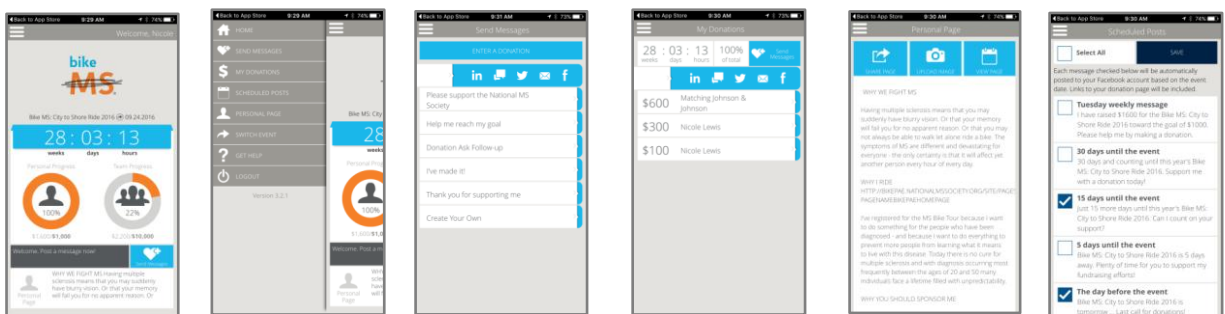
TEAM CAPTAIN'S CORNER

As a team captain, you have access to additional team captain tools and resources. See below how to utilize these to build and manage your team.

EDIT YOUR TEAM PAGE

From your Home page, click 'Team Page' at the top of your tool bar on the Home page.

Similar to your Personal page, you have the ability to edit your Team page content and URL, and add photos. Share your story. Tell everyone why your team is riding and share goals, past team achievements, upcoming fundraisers or training events and much more. Reference UPDATE YOUR PERSONAL PAGE… section on page 4 for more details.

VIEW TEAM MEMBERS & DOWNLOAD YOUR ROSTER

From your Home page, click 'View Team Roster' on the right to view your teammates.

DOWNLOAD TEAM ROSTER:
Click 'Download Roster' to download an excel file including each team member's contact information and total raised. An excel file will begin to download on your computer.
>>TIP: Contacts and saved e-mails <u>WILL</u> carry over annually, however **team rosters will <u>NOT</u> carry over**. Download and save a copy for your records by the end of December.

From this page, you can also download an excel file of your team donations and team statistics. Reference VIEW MANAGE TEAM DONATIONS… section on page 16 for more details.

MANAGE CAPTAIN STATUS:
Change captain status and/or designate co-captains. Designating a co-captain will permit a fellow member to utilize the team captain resources and help you manage your team. Check the box next to the team

member's name you wish to designate as co-captain or new captain. If you no longer plan to captain the team, also uncheck your name and contact your Bike MS staff representative to let them know of these changes.

TEAM CAPTAIN'S CORNER

As a team captain, you have access to additional team captain tools and resources. See below how to utilize these to build and manage your team.

RECRUIT & COMMUNICATE WITH TEAM MEMBERS

LEAVE A MESSAGE FOR YOUR TEAM:
Have a fundraiser or training ride coming up? Want to give a shout out to the highest fundraiser of the week? Use this section to communicate these important messages to your team members! From your Home page, click 'Edit' in the Team Captain Message section on the right to add or change the message, which will appear on each of your team members Home page.

SEND AN EMAIL YOUR TEAM:
In addition to the option above, you can email team members. Welcome them to the team and/or share updates, important reminders, motivational messages, etc.

On the Email page, select Team Message from the Recruiting drop down. Utilize the template to send or edit. Or draft your own message.

Once your email is complete, click 'Next' to select your recipients. Click 'Group' from the dropdown and check the 'Teammates' box.

SEND A RECRUITMENT EMAIL:
Ask other to join your team! On the Email page, select Join My Team from the Recruiting drop down. Utilize the template to send or edit. Or draft your own message.

Once your email is complete, click 'Next' to select your recipients. Click 'Group' from the dropdown and check the groups you wish to send to (i.e. Non-Teammates).

Reference SENDING EMAILS section on pages 5-8 for more details and instructions.

TEAM CAPTAIN'S CORNER

As a team captain, you have access to additional team captain tools and resources. See below how to utilize these to build and manage your team.
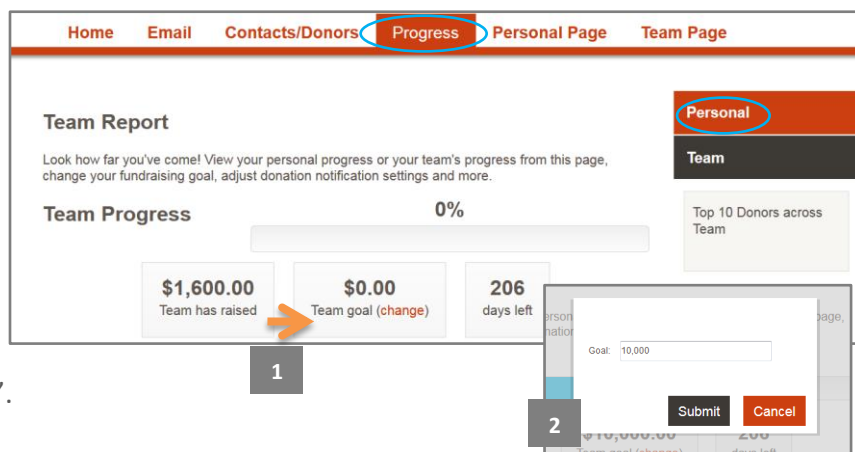
MANAGE TEAM DONATIONS, FUNDRAISING GOAL & PROGRESS

Click 'Progress' at the top of your tool bar on the Home page and select 'Team' option in the box on the right hand side.

VIEW YOUR PROGRESS: See how much you have raised, percent to goal ratio, top 10 donors across your team and how many fundraising days remain.
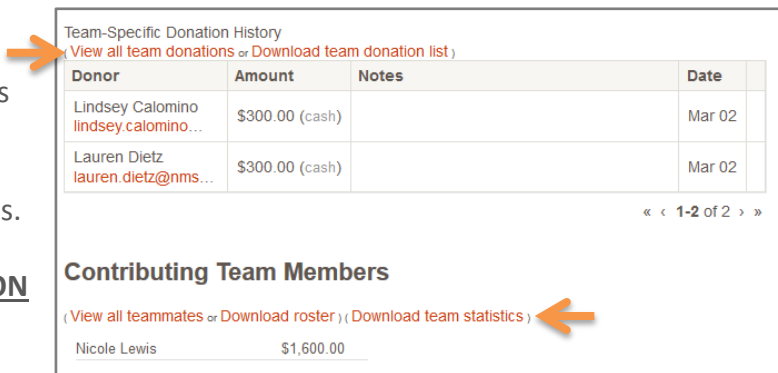
UPDATE YOUR TEAM GOAL: Click 'Change' to enter your new team goal, and click 'Submit'.

VIEW TEAM-SPECIFIC DONATION HISTORY: Scroll to the bottom of the page for a quick view of your team member's fundraising progress and/or donations made to the team. Click 'Download team donations list' to download and save an excel file of all team donations.

DOWNLOAD YOUR TEAM'S DONATION LIST & TEAM STATISTICS: Click 'Download team statistics' for a more comprehensive and in-depth look at your team member's fundraising. This list will also include any gifts made directly to the team.

>>TIP: Contact your Bike MS staff representative to allocate Team Donations to particular team members.

From this page, you can also view your teammates and download your roster from this page. Reference VIEW TEAM MEMBERS & DOWNLOAD YOUR ROSTER section on page 14 for more details.

>>TIP: Contacts and saved e-mails WILL carry over annually, however **team rosters and donation lists will NOT carry over**. Download and save a copy for your records by the end of December.

BIKE MS IS THE
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