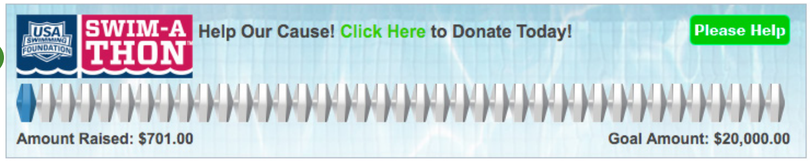
TUMoney™

Complete Participant Setup Guide for the Event Fundraising System.

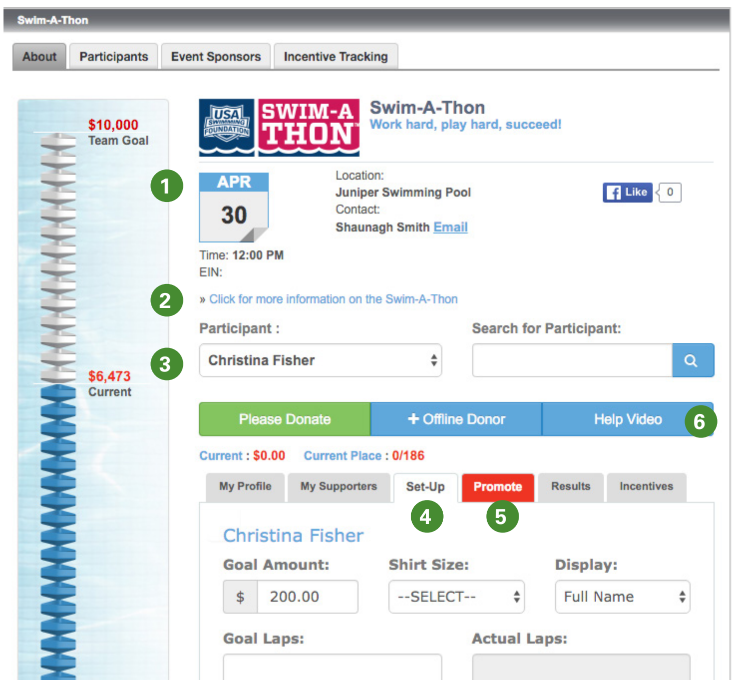
Participant Setup



Tips and Tricks

Remember that the account balance will not be affected by the campaign. The system will create an invoice and corresponding payment.

1 Event Fundraising is easy to setup for each individual athlete. You should have received a launch letter from your administrator with a link that will bring you directly into your setup page. If you have not received this simply click your fundraising banner to access your setup.



Tips and Tricks

The best way to get your athlete involved is to have them help you setup their profile. When kids take ownership of the fundraising it becomes important and exciting to watch their goal being reached. Swim teams rely on this money to be better clubs and help your athlete be an all-around stronger athlete.

Use the pictures to represent your athlete and to show the donor what type of person and swimmer they are. Have fun with this portion!

1 **Fundraiser Information** - This area has been setup by your Administrator. It will give you information about the fundraiser including date, time, tax number if applicable, location, contact, and phone number.

2 **More Information** - This is an expandable feature that is viewable to yourself and any potential donors. Click it for more information on your fundraiser.

3 **Participant Area** - Once you are logged in, all of your children will appear in this dropdown. Select your child to begin the setup of their profile. The public will be able to then select an athlete and the corresponding “Please Donate” button to ensure they can donate to the athlete of their choice. Their current donation total and “dollar” place on the team will be viewable as well.

4 **Set-Up** - You must click this tab to setup each child. This tab is viewable to logged in parents and to allow for individualized setup for each athlete.

5 **Promote** - Click this tab to help promote the fundraising event. See page 3 for more help.

6 **Help Video** - Click this for a video to guide you through your setup process.

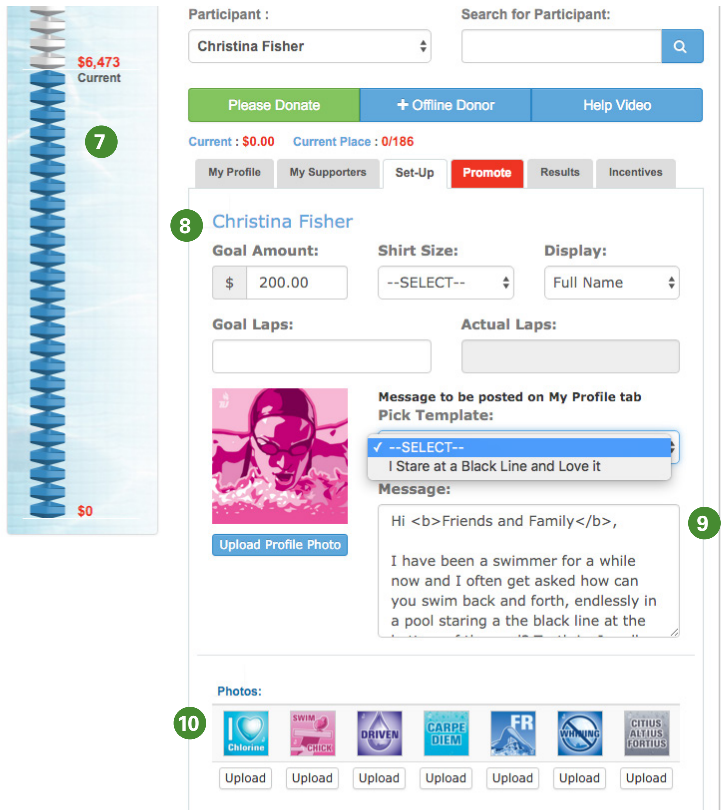
Participant Setup

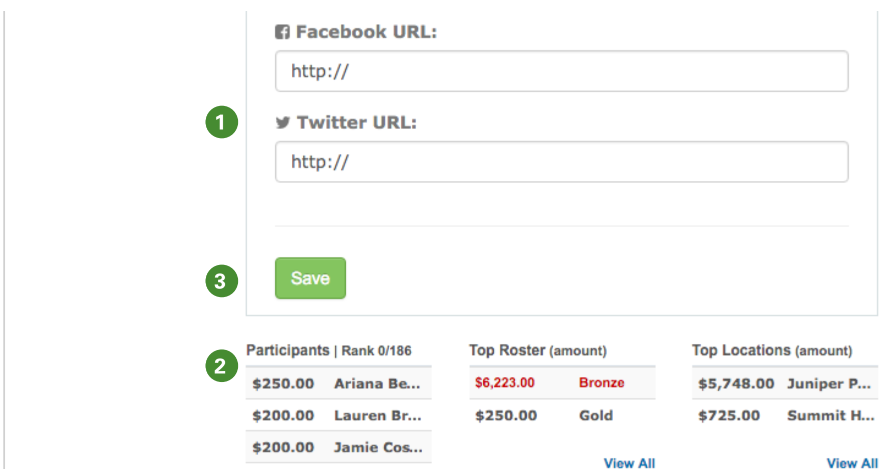
7 **Lane Progression Goal Marker** - Keep an eye on your lane line to see how close your team is to meeting your goal amount.

8 **Participant Information** - Select your fundraising goal, laps that you would like to complete (if applicable), shirt size, and display name. Actual laps will be added by the administrator.

9 **Message to be posted on My Profile tab** - Select a pre-templated message that you can edit by using the template dropdown or simply type into the text box to create your own. This message will appear on the profile page to potential donors.

10 **Photo Upload** - Upload both your swimmer's profile picture and additional pictures to help show off some of your child's achievements, hobbies, strokes, or even just something fun. Your site also comes with some great pre-loaded pictures. Simply select "From Library" in your options.





Tips and Tricks

Facebook and Twitter are proven marketing outlets and they also to let your friends and family know they are working hard to raise money for a great sport.

1 **Social Networking** - Enter in your Facebook and Twitter URL to help market this fundraising event. Go social and see how many people you can reach! Don't forget to leave the http:// in the field before you enter in your www.facebookURL.com.

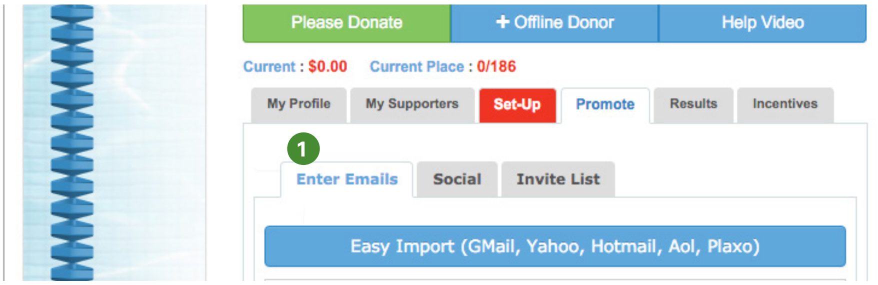
2 **Top Earners** - Keep an eye on this area to see who are the top earners based on different criteria.

3 **Save** - Don't forget to click "Save" to ensure all of the work you have done is saved. Click the tab "My Profile" to see the results.

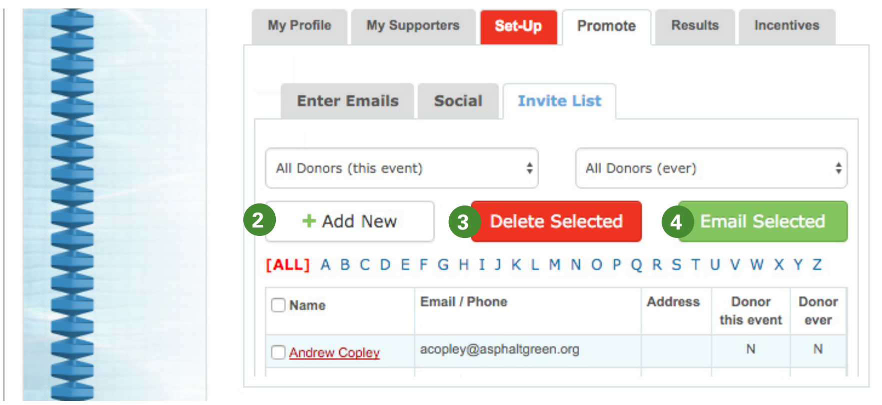
Tutorial

Overview of your Event Fundraising Tools

Promotion



1. **Easy Import (Gmail, Yahoo, Hotmail, AOL, Plaxo)** - Use this selection to easily login to your personal email account and pull your current email list into your promotion tool.



2. **Add New** - Click "Add New" to update the email list.

3. **Delete Selected** - Place a check mark in the box to the left of the Name column header and click "Delete Selected" to delete that email account.

4. **Email Selected** - Click this button to send an email invitation to donor (see next page).

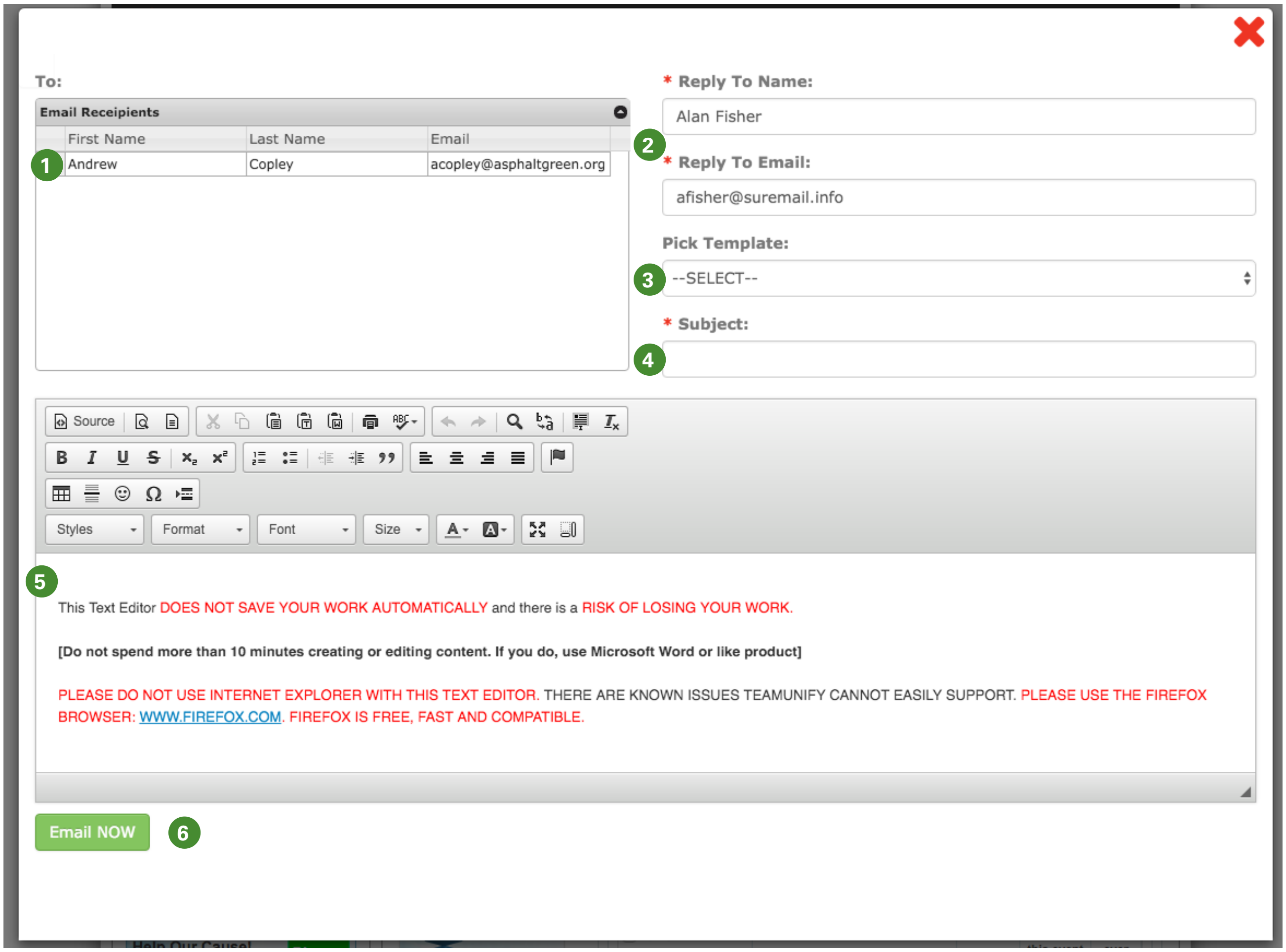
Tutorial

Promoting Tutorial

Tips and Tricks

"Easy Import" is a great way to contact your friends and family. Select this option to use your extensive e-mail list that you have already spent years creating.

Promotion



1 **Email Recipients** - This area lists the potential donors that were selected in your "Enter Emails" screen previously.

2 **Reply to Name/Reply to Email** - The system will automatically pull the account name and email into these fields. The email will be sent from this name/email address and any replies will be sent to the email noted.

3 **Pick Template** - Use the drop down to select a pre-templated email created by TeamUnify which you can edit, or leave it on --SELECT-- to create a custom email to be sent to potential donors.

4 **Email Subject** - Fill in the Subject. This is a required field.

5 **Email Body** - Use the email formatting options to add formatting.

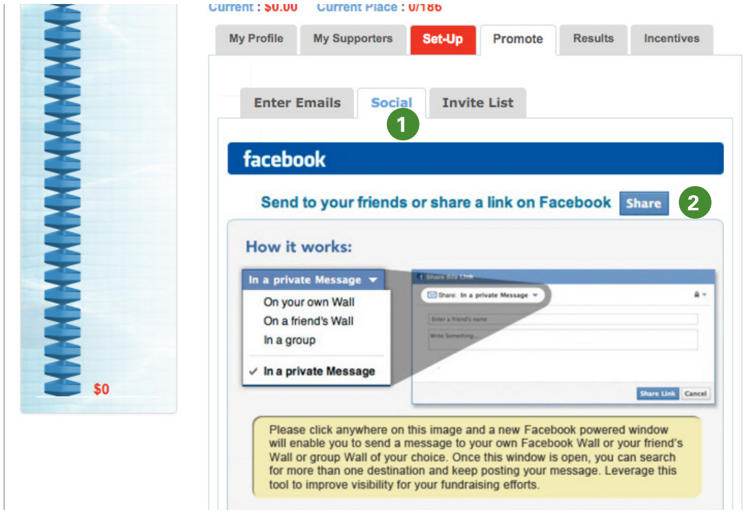
6 **Email NOW** - Don't forget to email this out by clicking the "Email NOW" button.

Tips and Tricks

The templates are a great way to reach your potential sponsors. What is nice about this feature is that it will bring in your account names, team information and other data automatically. Select a template and look for the bold lettering. This usually means it is bringing in data from your fundraising system.

TeamUnify™

Promotion



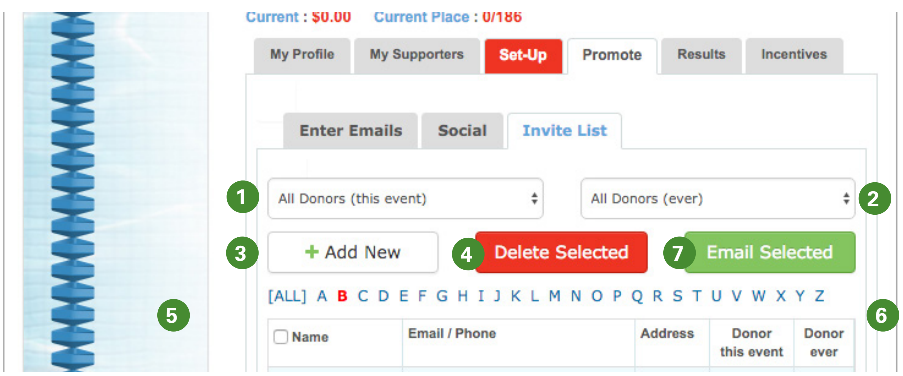
Tips and Tricks

Facebook is a great way to reach your friends and family. There isn't an easier way to get your message out than the "Share" button. Get Social!

With Facebook and TeamUnify you'll get more donors than you ever imagined!

1 **Social Tab** - Select the social tab to access the share link functionality.

2 **Share** - Select this button to bring you to the Share Link button to add this fundraising event to your Facebook page.



Tips and Tricks

Use the e-mail function to send a thank you letter to all of your donors. Use the filter option "All Donors (this event)," select all and click "Email Selected."

1 **All Donors (this event)** - Use this filter selection to show All Donors (this event), Not Donated (this event), or Donated (this event).

2 **All Donors (ever)** - Use this filter to selection to show All Donors (ever), Not Donated (ever), or Donated (ever).

3 **Add New** - Click this button to add a new email address to the invite list.

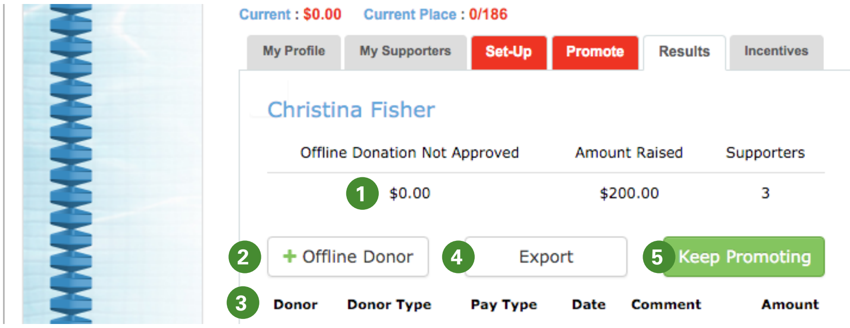
4 **Delete Selected** - Place a check mark to the left of one or many email accounts and click "Delete Selected" to remove them.

5 **Email accounts** - This table shows all email accounts that have been sent a fundraising email from this module.

6 **Donor this event/Donor ever** - These columns will show a N (no) or a Y (Yes) to quickly denote who has or has not donated either by event or lifetime.

7 **Email Selected** - Place a check mark to the left of one or many accounts and click the button "Email Selected" to send a pre-templated email or user defined email.

Incentives & Management



Tips and Tricks

Show your participant this area to build excitement and pride in what they are accomplishing. The comments show them just how much support they have.

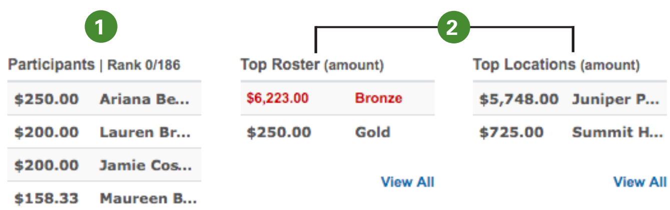
1 **Financial Area** - This summary area will show you any offline donations made but not approved, total amount raised (offline plus any amount donated through the site), and the number of supporters.

2 **Offline Donor** - Use this button to add a donor who does not go through the site to donate money. This function only allows cash or check and will not be considered official dollars raised until an administrator approves it.

3 **Donor Information** - All donor information regarding financials will show including any comments left during the donation.

4 **Export** - Use the "Export" button to produce an Excel spreadsheet with all donor information including Donor name, participant receiving donation, Account name, and donor financial information.

5 **Keep Promoting** - Clicking this button will bring you to your invite list.

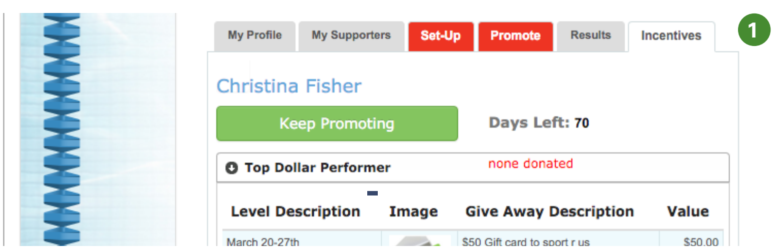


Tips and Tricks

Show your participant this area so they can quickly see where they are compared to other teammates.

1 **Participant Incentive Information** - This area includes the participant name, how they rank, and will also show any other of their participating siblings in black.

2 **Incentive Levels** - All incentive levels setup by your administrator will be viewable. Simply click the blue "View All" link to see how they compare with others.

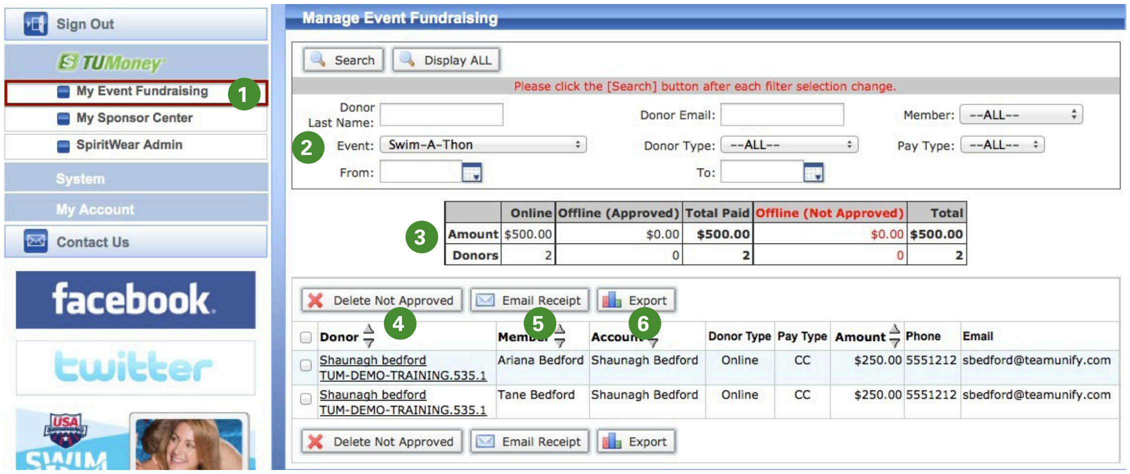


Tips and Tricks

Incentives are a great way for your participant to see the results of their efforts. It's a great way for the team to say thank you for their efforts!

1 **Incentives** - All incentives available for this fundraiser will be viewable in this area. The participant will be able to see the number of days left, the name of the incentive, $ to next level, and all information to understand the incentive levels.

Incentives & Management



1 My Event Fundraising - Click this button located under TUMoney to access your event fundraising management section.

2 Filters - Set your filters to search for specific donor information. You can search for fundraiser specific donors or even donations over a lifetime. Once you choose your filters, click "Search" to show your results.

3 Financial Summary - View your financial results based on your filters.

4 Delete Not Approved - Place a check mark next to a donor that was not approved by the administrator and click "Delete Not Approved." Reasons for using this function may be that your donor did not supply the check or cash amount as decided upon through the "Offline Donor" function.

5 Email Receipt - Place a check mark next to a donor(s) and click "Email Receipt" to send them a donation receipt to their email on file. The donor will receive an automatic receipt email when they make their donation.

6 Export - Click this to export to Excel all donor and participant information.

Tutorial Collecting and Tracking your Donations

TUMoney Notes

Notes