Peer-to-Peer Participant User Guide

As a registered participant of a peer-to-peer event, you have a variety of tools at your fingertips to help you reach your goals! Your Fundraising Center will be the hub for managing your involvement and fundraising activities. This guide will show you how to navigate all aspects of the site.

Table of Contents

Powered By Qgiv ®

Getting Around

Once you complete registration, you'll be prompted to create your fundraising account. Enter a password. Then, click **My Fundraising Dashboard**, and you'll be directed to your Fundraising Center.

You'll also receive a "Start Fundraising" email after registration with a link to set up your account. So if you don't create a password right away, you can always refer back to that email.

After you log out for the first time, you'll return to the Event Home Page to log back in.
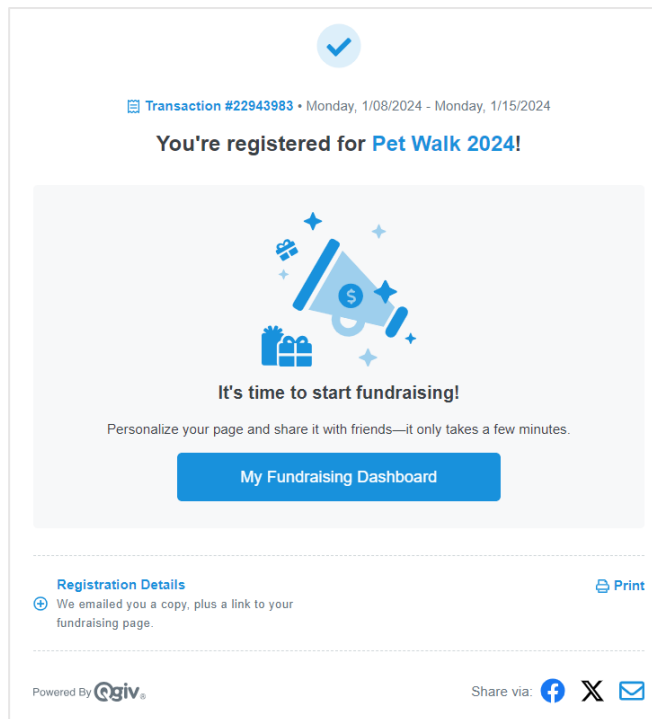

You can do so by hovering over the **Log In or Sign Up** area in the top right of the screen. Here, you'll enter the credentials you created during registration. If you can't remember your password, click the **I need help with my password** link to the right of the Log In button, where you'll be able to enter your email and generate a reset password email.

Pro tip: Usernames are always email addresses. If you forget your username, you can either reference your initial registration email or contact the organization hosting the event.
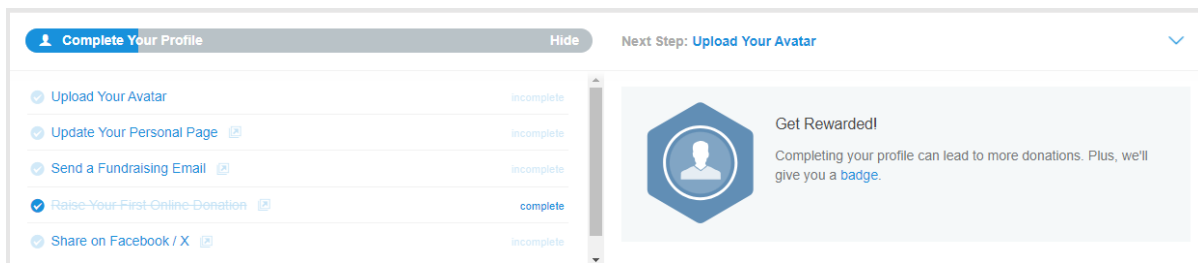
Welcome Quest

If enabled, you'll be prompted to begin the Welcome Quest to complete your profile as soon as you log in.
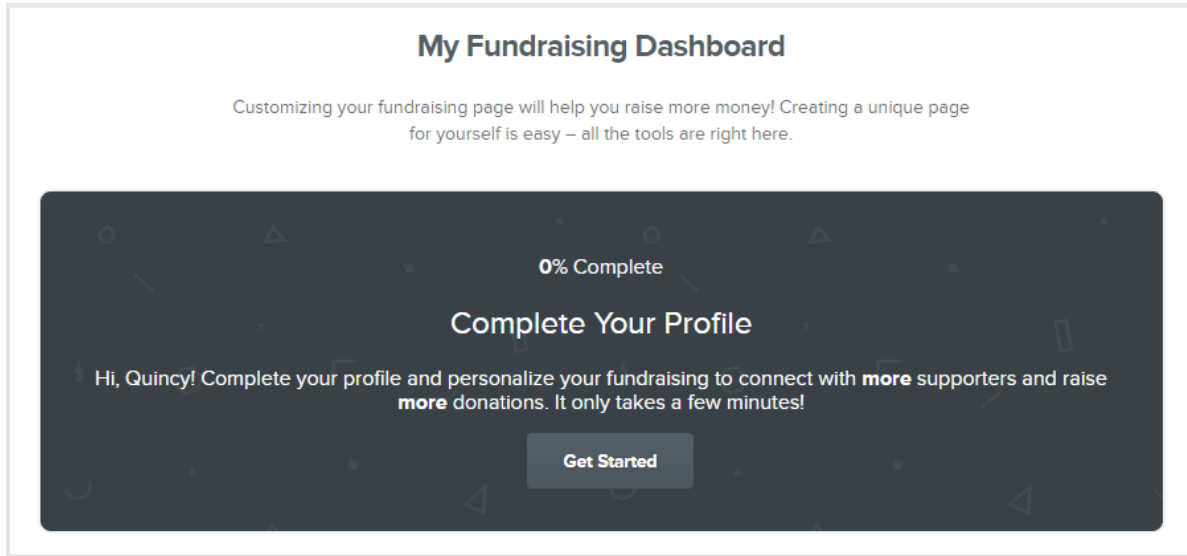
The Welcome Quest is designed to help walk you through the main components of your Fundraising Dashboard. As a bonus, you'll receive a badge upon completion.

The exact steps may vary, but here's an example of what you may see at part of the Welcome Quest:


You can access your Welcome Quest via the prompt at the top of the screen or the bar spanning the bottom of the screen. The bar will stay minimized, but you can expand it by clicking on it at any time.

To get started, click **Get Started** in the prompt at the top of the page, or click on one of the Welcome Quest items in the bar at the bottom of the page. The system will guide you through it from there.
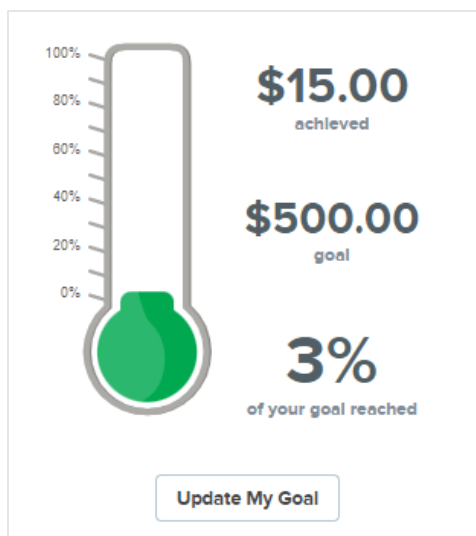
My Fundraising Tools

You can navigate to all areas of your Fundraising Center and copy URLs for your personal/team fundraising pages, as well as your personal donation page, from this dropdown.
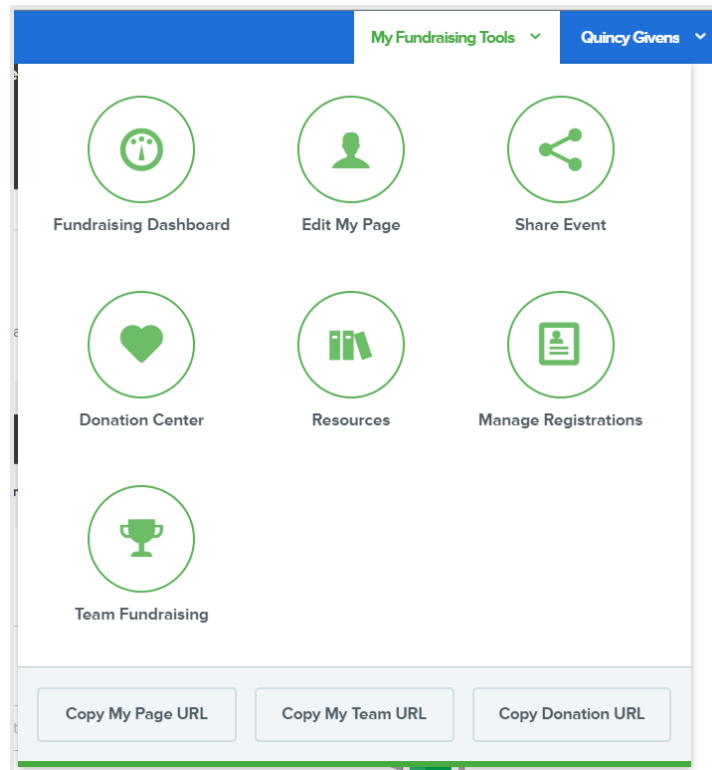
Fundraising Dashboard

Your Fundraising Dashboard includes your thermometer, which displays how much you've raised thus far, your individual goal, and the percentage of your goal you've currently raised.

You can change your fundraising goal by clicking the **Update My Goal** button below the thermometer.

My Page, to the left of the thermometer, will show you your fundraising page URL and allow you to **Edit URL** if you're interested in appending something to the end.
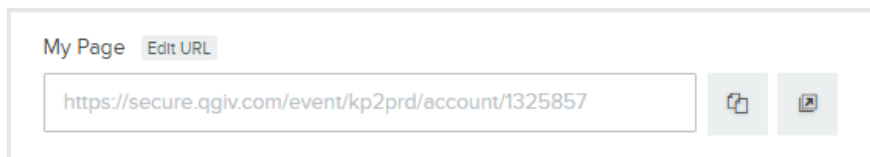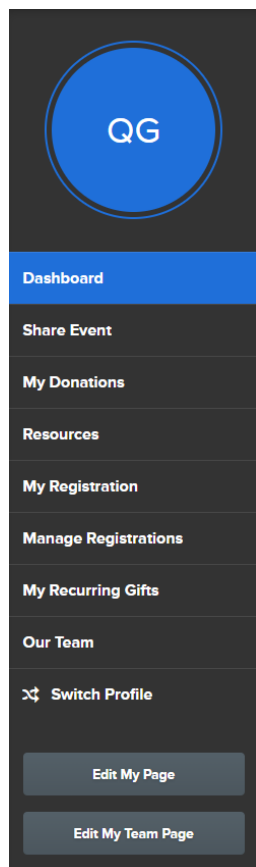

You can use the **Copy** button to copy the URL to your clipboard and then paste it wherever you'd like to use it. Use caution if you add an ending to the URL. If you change the URL after you've already posted links to your page, the links will be broken!

Use the **Visit My Page** button to go directly to your fundraising page.
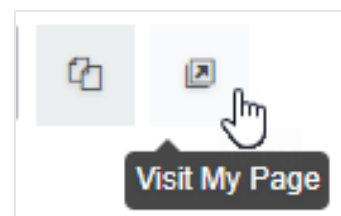
You may also navigate between the different areas of your fundraising center via your Fundraising Dashboard. You'll see a menu down the left side that contains the same navigation items as your My Fundraising Tools dropdown, along with a few additional options/pieces of information.

First up is your **Personal Avatar**. The avatar will be used on your personal fundraising page and throughout the system on activity feeds such as leaderboards, recent activity feeds, etc. By default, the avatar contains your initials.

To upload an alternate image, hover over the current default and click the **Change Profile Image** area.

You can access and change your personal avatar even if you navigate to a new area of your fundraising dashboard; it will always be displayed above the menu along the left side.
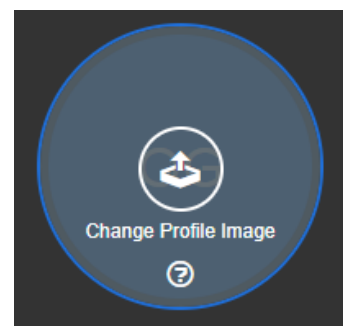
Dashboard will always bring you back to this main page.

We'll cover Share Event, My Donations, Resources, My Registration, Manage Registrations, and Recurring Gifts a little later.

Edit My Page will shortcut you to the content management system, allowing you to customize the look of your fundraising page.

Join a Team will shortcut you to a screen where you can search for teams from a list of existing teams, or you can create your own team.
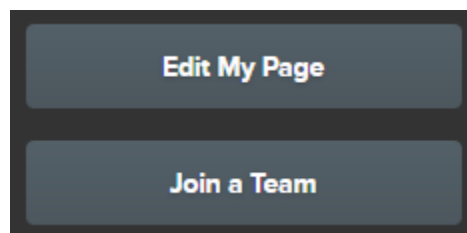
If you're already on a team, the button will be replaced by a navigation item that says **Our Team**, which will appear below **My Recurring Gifts**. It will take you to your team's fundraising dashboard and give you a few options for actions to take, which we'll talk about later on.

If you're a classification captain, you'll see the **Our Classification** link, which will take you to your classification's fundraising page.

Please note: The Classification label can be changed by the host organization, so the link might say something other than "Classification."

Powered By **Qgiv**®

Edit My Page

In this area, you can customize your personal fundraising page. Your ability to customize different areas of your page is managed by the nonprofit organizing your event. If you're unable to edit or move certain widgets, it's likely because your admin has not enabled this functionality.
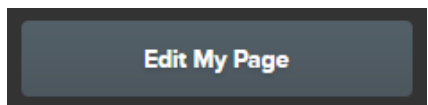
After you click the **Edit My Page** button, you'll see a number of boxes that allow you to customize your page. These boxes are called widgets.
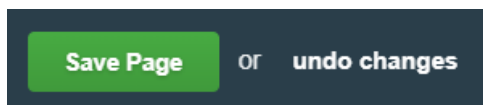
To edit a widget on your page, click on the gear icon in the top right-hand corner of the widget. Each widget will provide a variety of options allowing you to edit the look, feel, and content that's displayed.
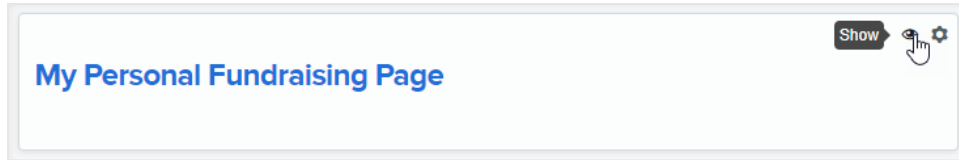
Edit mode:

After making your changes, click the **Update** button.

Make sure to click **Save Page** when you're done.

To hide a widget on your page, click on the eye-shaped icon in the top right-hand corner of the widget you wish to hide.
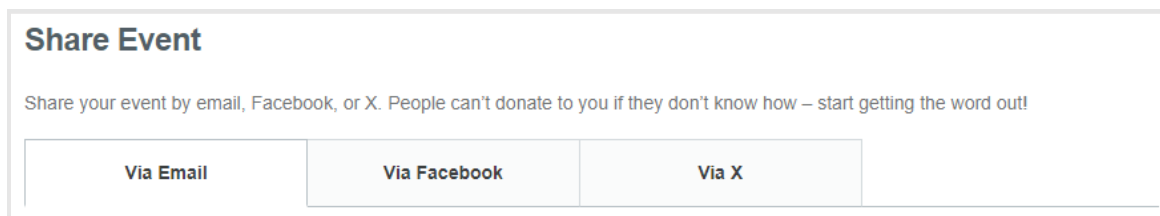
Show

My Personal Fundraising Page

Once again, make sure to click the **Save Page** button when you're finished.

Undo changes will undo anything that you've not yet saved, and **Reset Page to Default** will take the page back to the default settings defined by the admin.

C Reset Page To Default

Powered By **Qgiv** ®

Share Event

Earn more donations by sharing your event with friends and family! In this tab, you're given the tools to share the event and your personal and team pages via email and social media.

Share Event

Share your event by email, Facebook, or X. People can't donate to you if they don't know how – start getting the word out!

Via Email	Via Facebook	Via X

Via Email

Use the **Via Email** tab to create mailing lists and emails you can schedule or send immediately. You can create your own templates or use any your admin has defined for you.

To display the Emails, Email Recipients, Drafts, Mailing Lists, and Templates tabs, click the **Email Management** button.

Email Management
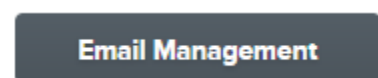
If you're just getting started, you'll probably want to create a new mailing list filled with your own personal contacts. If you'd like to bypass this step, you can enter email addresses as part of the email creation process.
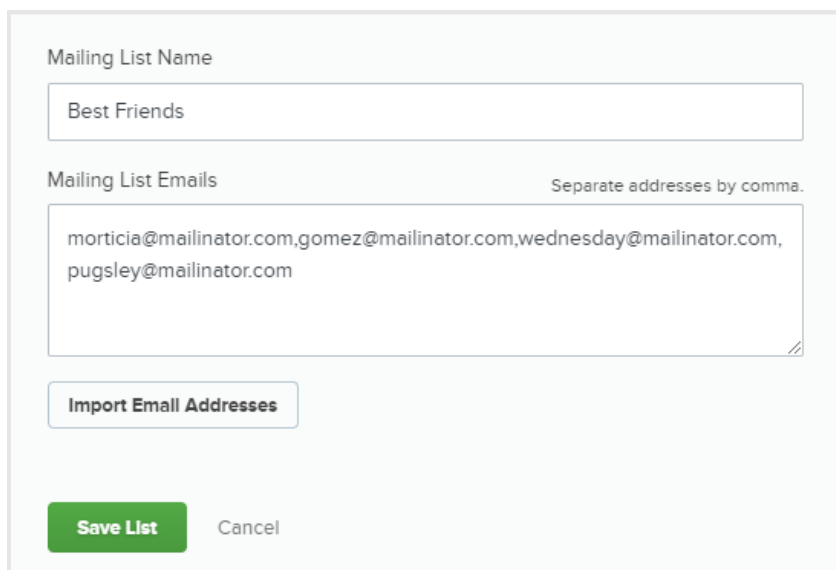
Creating a Mailing List

To create a mailing list, click the **Mailing Lists** tab in the Email Management area and choose **+ New List**.

| Emails	Email Recipients	Drafts	Mailing Lists	Templates

+ New List
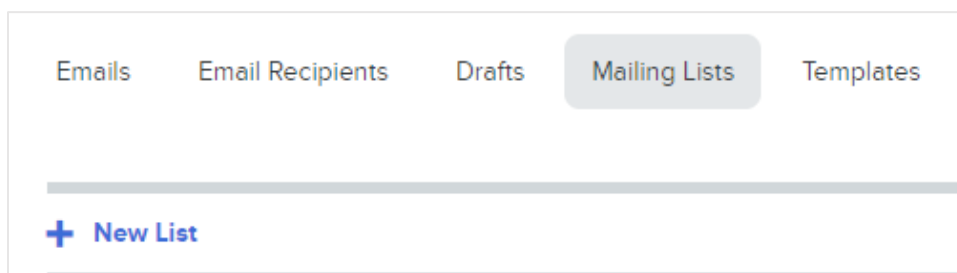
From here, you'll be able to enter a name for your list to make it easy to find in the future and enter or import your desired email addresses.

Powered By **Qgiv** ®

Building the mailing list is easy; just enter your email addresses in the Mailing List Emails box, separated by commas, or click on the **Import Email Addresses** button. Once you've completed your list, you should click **Save List** to continue.

Mailing List Name

Best Friends

Mailing List Emails   Separate addresses by comma.

morticia@mailinator.com,gomez@mailinator.com,wednesday@mailinator.com,
pugsley@mailinator.com

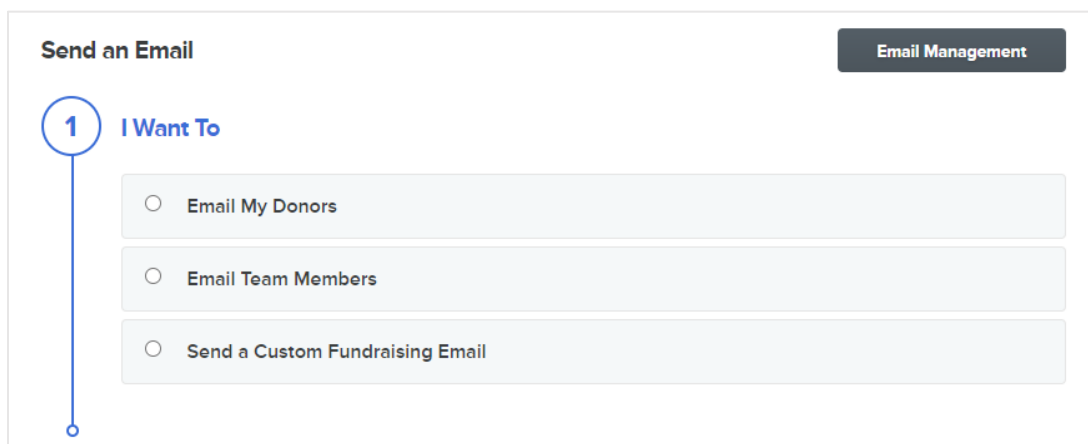Import Email Addresses

Save List   Cancel

Once a list is created, you can use these icons to send an email to the members of the list, copy the list, edit the list, or delete the list.
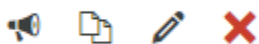
Creating an Email

When you're ready to create an email, navigate to the **Via Email** tab.

Step 1 is to choose if you want to email your donors or send a custom fundraising email. Click the corresponding button. If you're part of a team, you'll also see an option to email your teammates.

Send an Email   Email Management

1   I Want To

○ Email My Donors

○ Email Team Members

○ Send a Custom Fundraising Email

Powered By Qgiv®

You may or may not see all of the above options. This will depend on if you have any donors when you send the email and/or if you're part of a team.

If you choose **Email My Donors**, you'll be able to email anyone who has made a donation to your page.

If you choose **Email Team Members**, you'll be able to email any of your current team members.

After choosing your email type and entering a title, you can select a template from the **Choose Template** drop-down, if desired. This drop-down will include any predefined templates provided to you by the admin and/or any templates you've created in the templates area of your fundraising center. Once you choose a template, the Your Message section of this area will be populated with the content and can be modified as you wish.

If you don't wish to start with an existing template, you can choose to skip that drop-down and create your own unique content in the **Your Message** section.

Next, you'll define recipients for your message, along with when you'd like the email sent.

You'll have the flexibility to choose an existing mailing list, import email addresses, or use the **Send to These Addresses** box to enter emails manually. The system will display how many people the campaign is being sent to as you add emails and mailing lists.

When deciding when to send the email, you'll see four options. You can create and send the campaign immediately or choose one of the other three options that will schedule the campaign to send once the parameters outlined are reached.

Goal Percentage Reached allows you to define a percentage of your goal you'd like to be reached before the system sends the email. To use this option, click on the blank space in the sentence "Send my schedule when I've reached _____% of my goal" and enter your desired percentage.
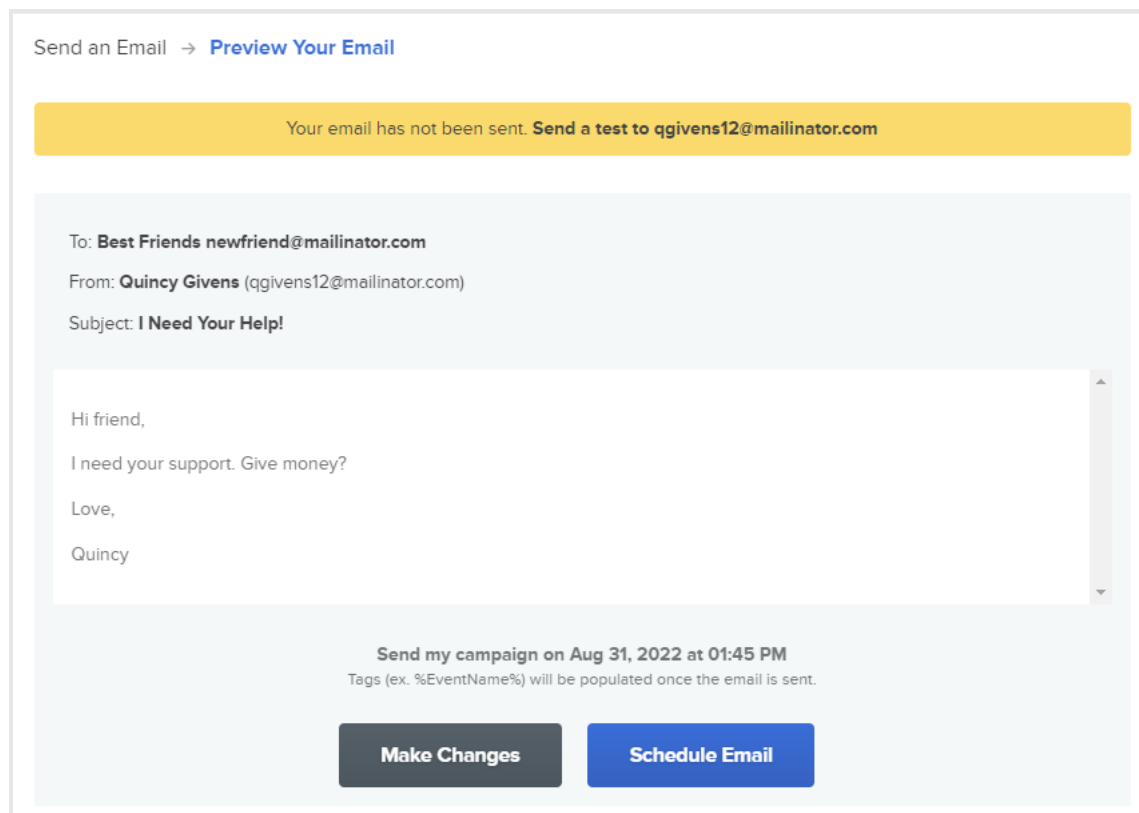
Send on a specific date allows you to define a date and time to send the email if you're not interested in sending it immediately.

Periodically will send the same email multiple times based on what you enter here. You can send on a daily, weekly, or monthly frequency, and you can also add a start date.

When you're happy with your email and ready to queue it for sending, click the **Save & Preview Email** button. If you're not quite done and would like to save your work and come back later, click the **Save as Draft** button.

Save & Preview Email   Save As Draft   Cancel
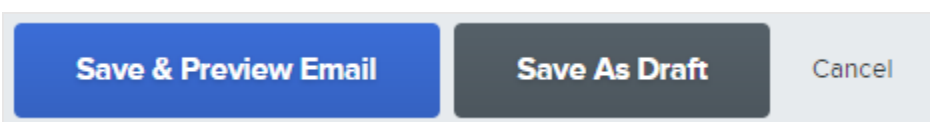
From the preview screen, you can send yourself a test of the email to make sure it looks the way you want.

Send an Email → **Preview Your Email**

Your email has not been sent. **Send a test to qgivens12@mailinator.com**

To: **Best Friends newfriend@mailinator.com**

From: **Quincy Givens** (qgivens12@mailinator.com)

Subject: **I Need Your Help!**

Hi friend,

I need your support. Give money?

Love,

Quincy

Send my campaign on Aug 31, 2022 at 01:45 PM
Tags (ex. %EventName%) will be populated once the email is sent.

Make Changes   Schedule Email

Powered By **Qgiv**®

If you need to make additional changes after the preview, click the **Make Changes** button, which will direct you back to the previous screen. If you're happy with what you see, click the **Send Email** or **Schedule Email** button to either send or schedule the campaign based on your preferences during initial setup.

The **Emails** tab of the **Email Management** section will list all scheduled and sent emails for you to view.

From this screen you can edit or delete any of your **Scheduled** emails by choosing the edit pencil or the red X to delete.
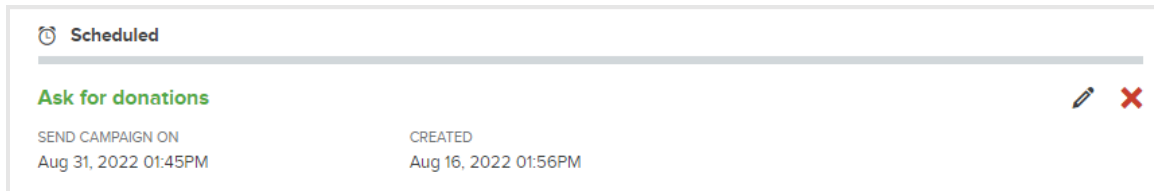
For any emails that have been sent, you'll see two additional icons.

Clone and Resend, which looks like two pieces of paper, will allow you to make a copy of the email and resend it. You can make any modifications you want to make with this option before sending.

You'll also see a small green icon that looks like a pie chart, which will allow you to view statistics on your campaign.
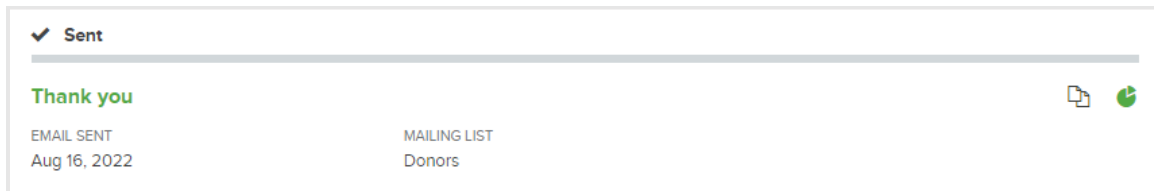
The **Email Recipients** tab shows a list of anyone you've sent an email to. From here, you can also see if the people you've emailed have contributed to your campaign.
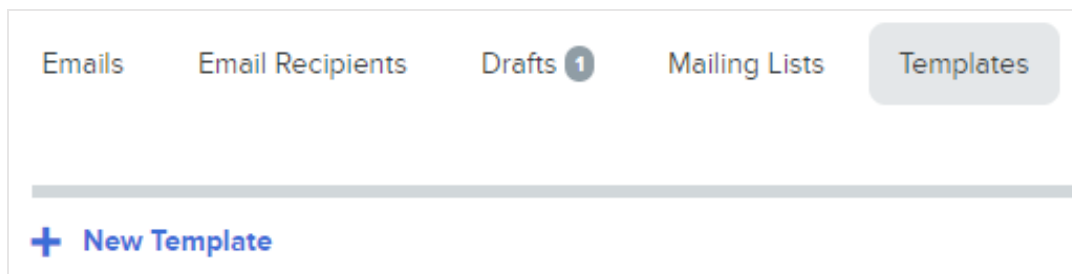
Any email that has been saved as a draft and not scheduled or sent will be housed in the **Drafts** tab of this interface with the ability to edit or delete the current content.
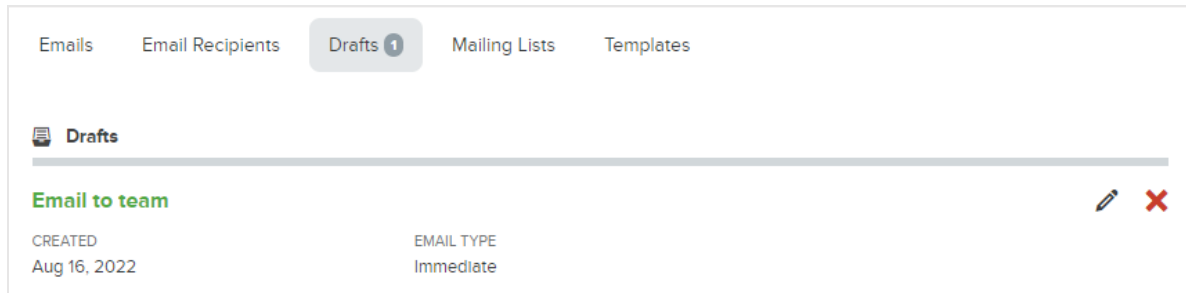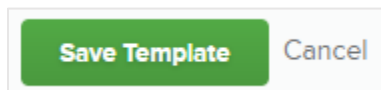

Creating a Template

If you'd like to create your own email templates for use within campaigns, you can create and manage these in the **Templates** tab in the **Email Management** section of **Share Event**.


Creating your own template is easy! You'll click on the **+ New Template** button and enter a Template Name, along with a Subject and Body content.

Once you're happy with what you've entered, click the **Save Template** button at the bottom of the body content box.

Once saved, these templates will be available in the template drop-down within the campaign creation screen and available for you to use immediately.
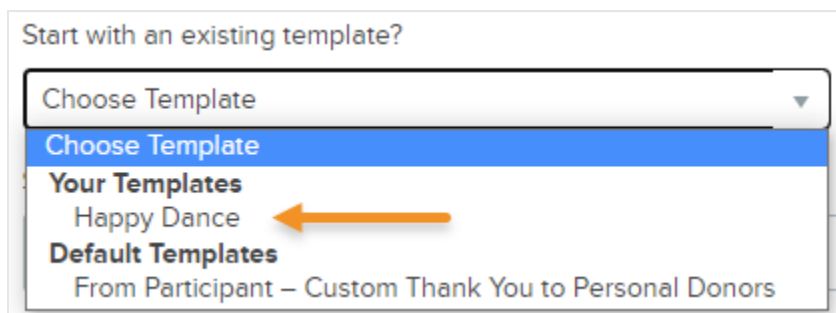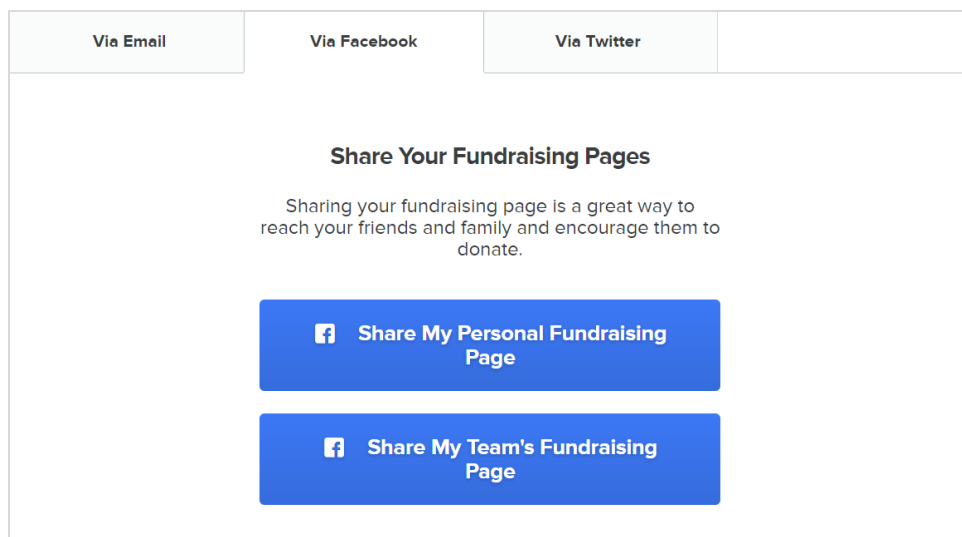
Via Facebook

Posting on Facebook is a great way to reach your network of family and friends to spread the word.

Use the **Via Facebook** tab to post links to your personal and team fundraising page's on your Facebook page.

In this tab, you'll see a large blue button inviting you to **Share My Personal Fundraising Page**. If you're part of a team, you'll also see **Share My Team's Fundraising Page**.

If you happen to be logged in to Facebook within your browser, you'll be automatically connected.

If you're not logged in, a Facebook dialogue box will pop up and ask you to sign in with your Facebook credentials.
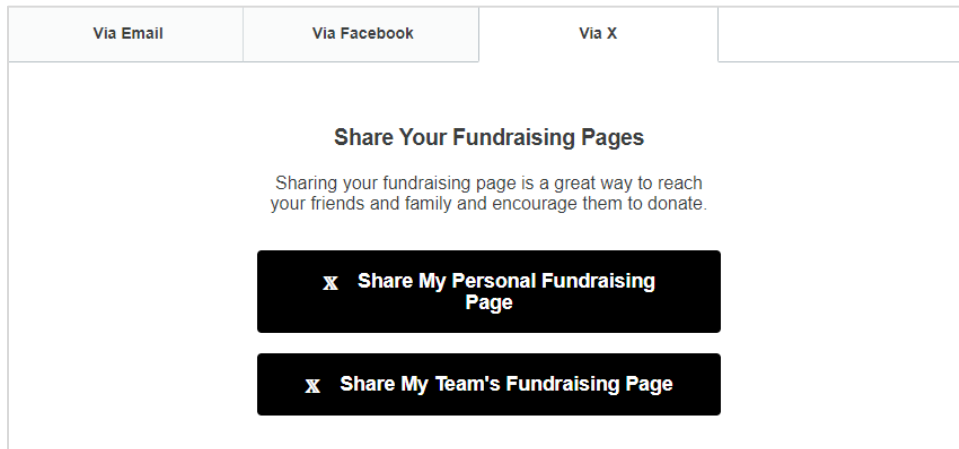
Once logged in, you'll be able to share a direct link to your personal fundraising page.

Powered By **Qgiv** ®
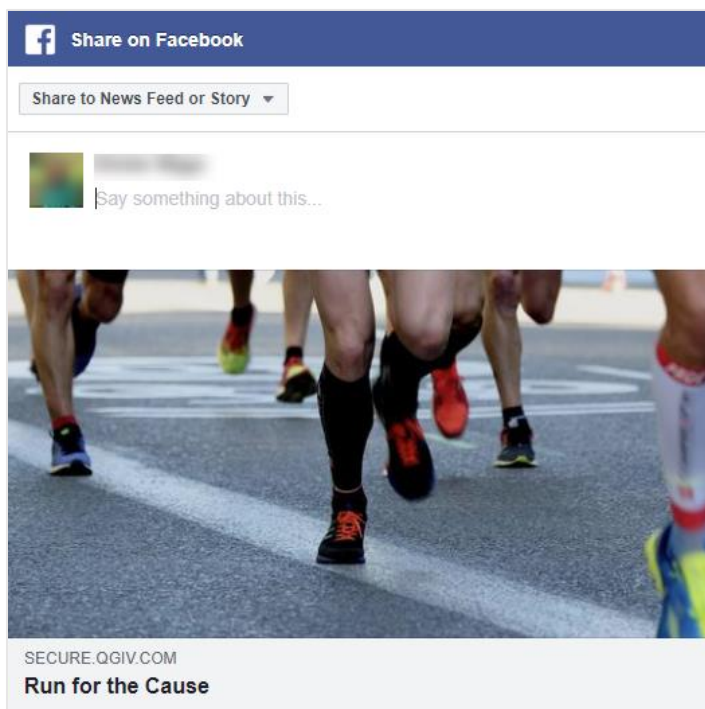
Via X

In you have an X account (formerly Twitter), you can also share your fundraising page directly to X using the Via X tab.

As with the Via Facebook tab, you'll see a large button inviting you to Share My Personal Fundraising Page. If you're part of a team, you'll also see Share My Team's Fundraising Page.

If you happen to be logged in to X within your browser, you'll be automatically connected.
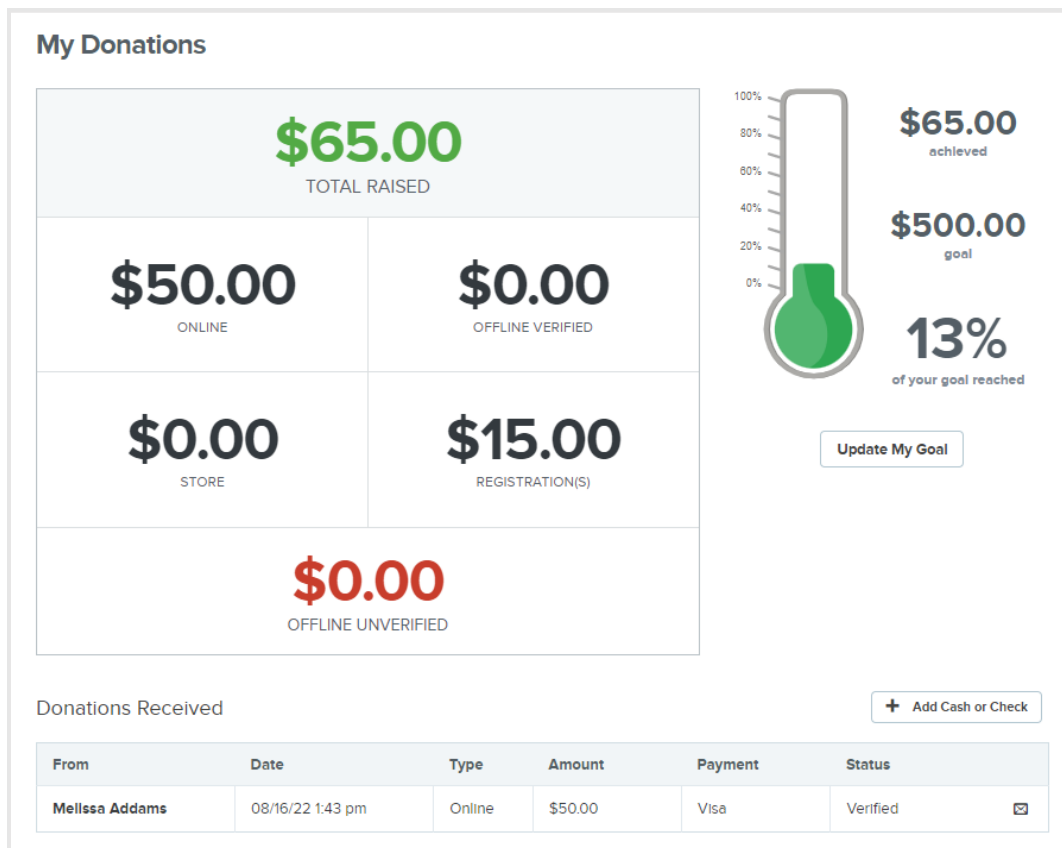
If you're not logged in, an X dialogue box will pop up and ask you to sign in with your X credentials.

Once logged in, you'll be able to share a direct link to your personal fundraising page.

Powered By **Qgiv** ®
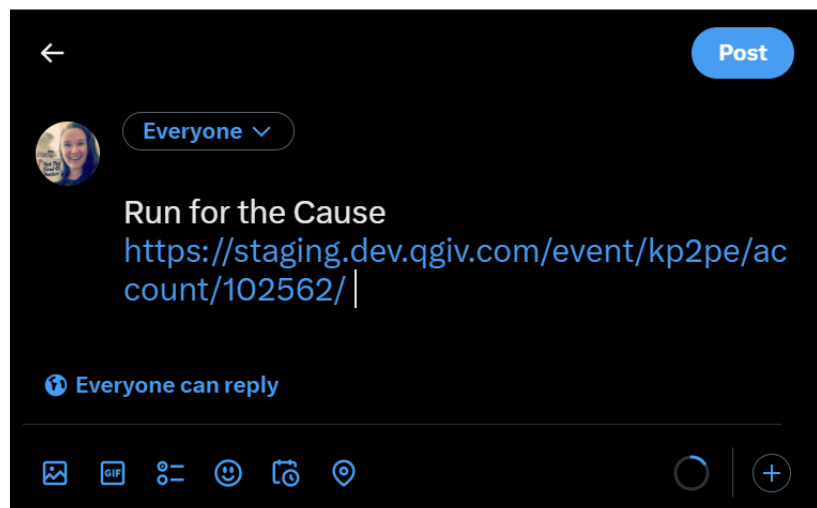
My Donations/Donation Center

This is the area you can visit to monitor your progress. All of your donation activity is housed here for your review.

Updating Your Goal

If at any time you'd like to make a change to your fundraising goal, you can do so in this area.

You'll see the **Update My Goal** button right below your thermometer that you'd click, enter your new goal, and save.

Powered By Qgiv ®
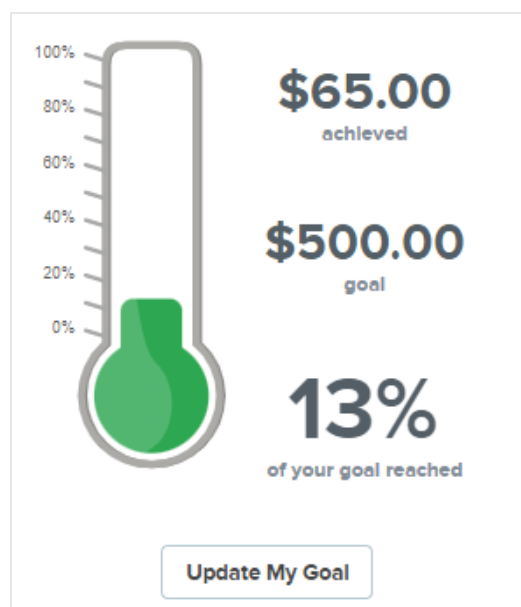
Adding an Offline Gift

If you have a cash or check donation to add, click the **+ Add Cash or Check** button and enter the information for your donor.

> **+ Add Cash or Check**

Please note: This option will only appear if the host organization allows offline gifts.

You can classify the gift as a check or cash gift. If it's a check gift, you can also record the check number for your records.

In the **Donor Information** section, the First and Last Name or Company Name, if it's a Company Donation, are required. All other fields are optional. If you choose to enter an email address, a thank you message will be sent directly to your donor once you click the **Save Donation** button at the bottom.

> **Save Donation**   Cancel
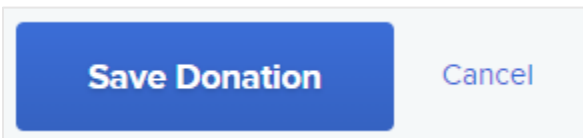
Any offline gifts you enter will be listed in your Donations Received table with their current status. Any offline gift you enter will have a status of "Unverified" until the host organization verifies it.

From	Date	Type	Amount	Payment	Status	
Susan Givens	08/16/22 2:41 pm	Offline	$100.00	Check	Unverified	✎

Resources

The host organization has the ability to upload resources for your use. Resources often include images, flyers, sample emails, instructions, etc. If your host has uploaded anything for your use, it will be located in the **Resources** section.

In this area, you can sort, preview, and download any files uploaded by the admin.

Downloadable Resources

Download resources provided by your organization.

File Name	Type		
Email templates	Document	🔍 Preview File	⬆ Download File
Organization logo	Image	🔍 Preview File	⬆ Download File

Powered By Qgiv®

Managing Registrations

My Registration

This is an area where you can manage your registration information, manage permissions, and access the badges area by using the tabs along the top of the window.

Info Tab

In the Registration Info tab, you'll see your **Personal Information**, which may be updated if needed. If you're part of a team or a classification, you'll see the names of those listed here, as well. Once you make any changes to these areas, you'll need to click the **Save Settings** button at the bottom of the page.

My Registration

Awesome Runners o Lakeland

| Info | Permissions | Badges |

Personal Information

First Name required
Quincy

Last Name required
Givens

Address required
111 Main St.

City required
Lakeland

State required
Florida

Zip Code required
22222

Country required
United States

Phone Number

Save Settings   Cancel

Commitment Tab

If you agreed to a Fundraising Commitment during registration, the Commitment tab will display your **Commitment Information**, including the Commitment Deadline, Total Raised, Commitment Amount, and Commitment Balance remaining.

Below the Commitment Information, you'll see the payment method associated with the commitment. You can **Edit** the **Payment Information** if you need to.

My Registration

| Info | Commitment | Permissions | Badges |

Commitment Information

Commitment Deadline: 11.30.2023 11:59pm EST

$0.00	**$150.00**	**$150**
TOTAL RAISED	COMMITMENT AMOUNT	COMMITMENT BALANCE
	NOT MET	

Additional Registrations

You registered 2 other participants with commitments using the payment method below. Manage Registrations to see their commitment

Payment Information

Visa ***1111
Samanthan Rutherford
207 Ensign Way
Cerritos, CA 33333

Edit

Permissions Tab

The next tab is where you'll manage your Permissions.

General Permissions

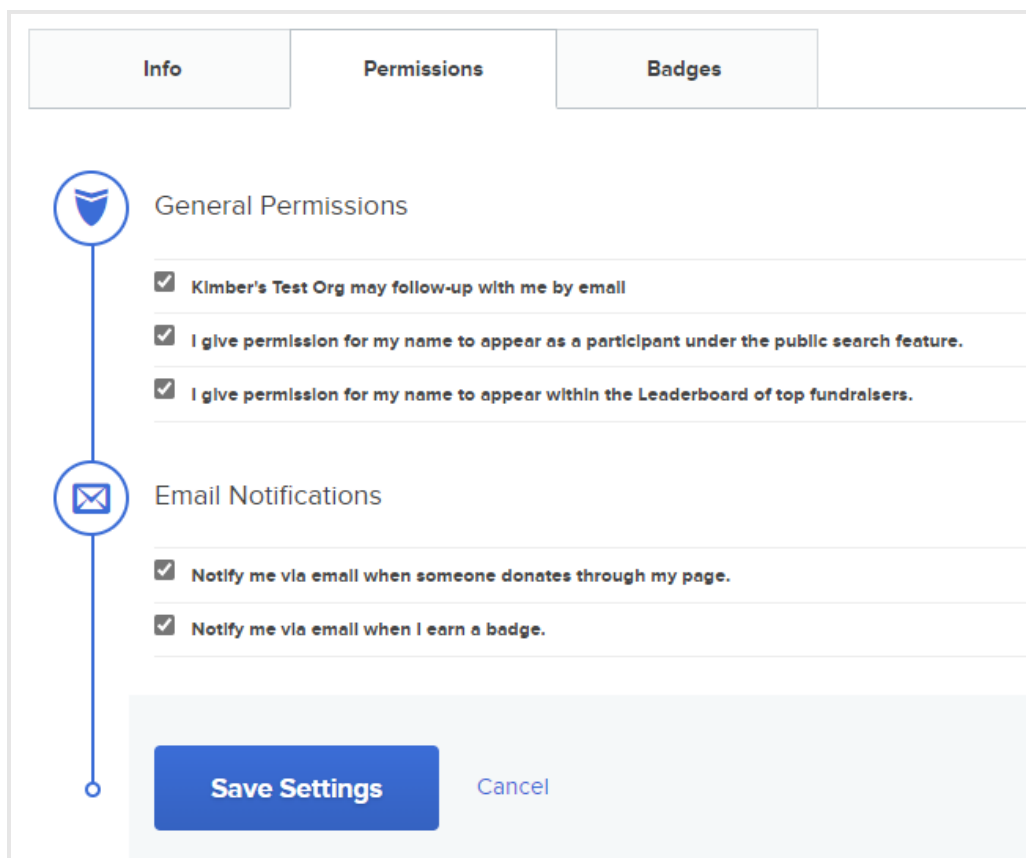This is where you can manage permissions for the following:

- Being followed up with via email
- Appearing in the search feature throughout the event site
- Appearing in the leaderboards as a top fundraiser if you qualify

Email Notifications

This is where you can manage email notifications for the following:

- Someone donating through your page
- Receiving a badge

Once you make any necessary changes to this area, click the **Save Settings** area to update your Permissions.

Badges Tab

If the host organization has enabled or created badges for your event, you'll see this section. Here, all badges you're capable of earning will be displayed, but grayed out. You can hover over any of them for a description of how you would earn the badge.

Any badges you've earned will be in full color and provide the ability for you to share your achievement on Facebook or X. You can share by clicking on the Facebook or X icons located within the box of the badge achievement you'd like to share. A dialogue box will appear for you to add a message before sharing.
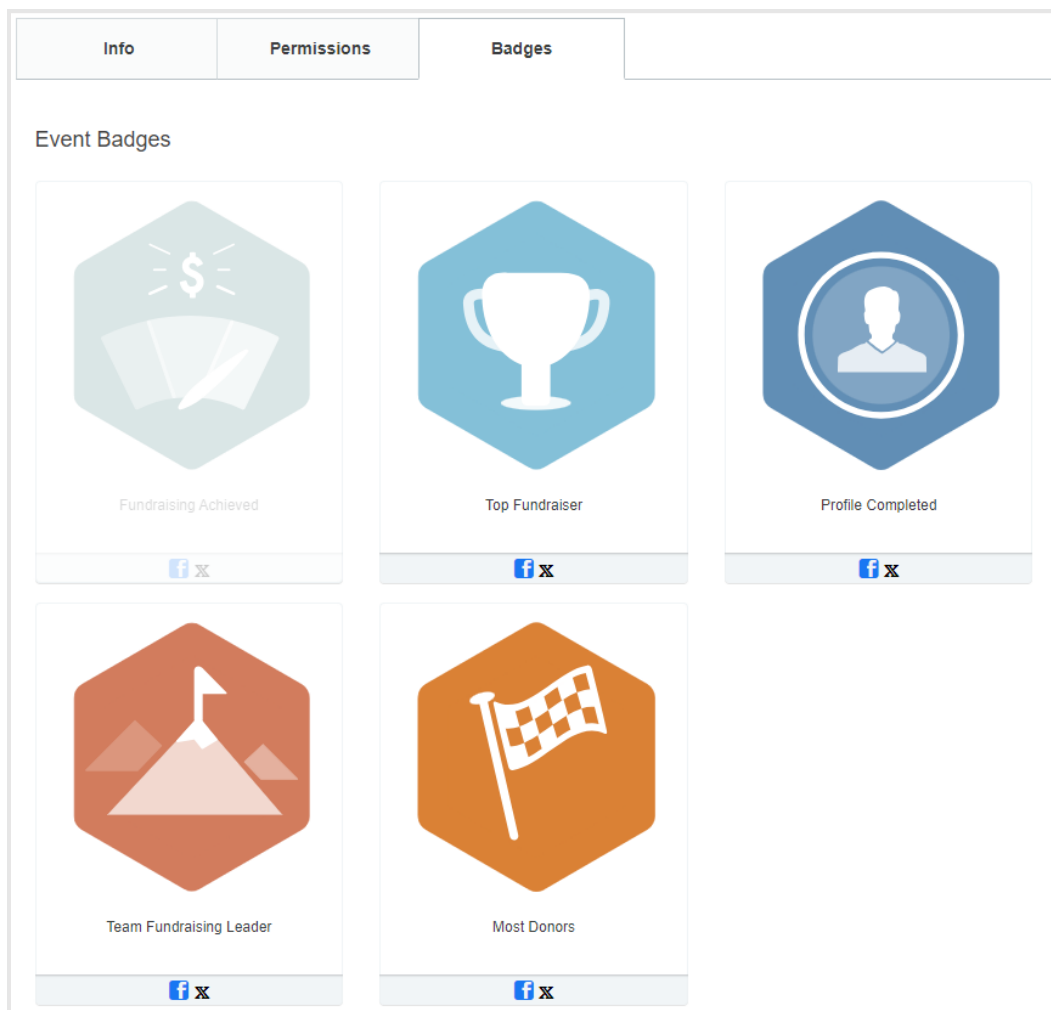
Manage Registrations

Please note: If the host organization doesn't allow for Additional Registrants, this link will be hidden.

This is an area to manage registration information for any additional registrants you may have or to add additional registrants.

If you have any additional registrants, they'll be listed in the table at the top of the **Manage Registrations** page. You can edit these registrations if necessary or add new ones right from your dashboard.

Manage Registrations

Registrations	Email Address	
Quiggly Givens ℹ	qgivens12@mailinator.com	✎ Edit Registration
➕ Add Additional Registrant		

To add registrations, you'd click the **+ Add Additional Registrant** button. This will take you through a registration process much like the one you went through to register.
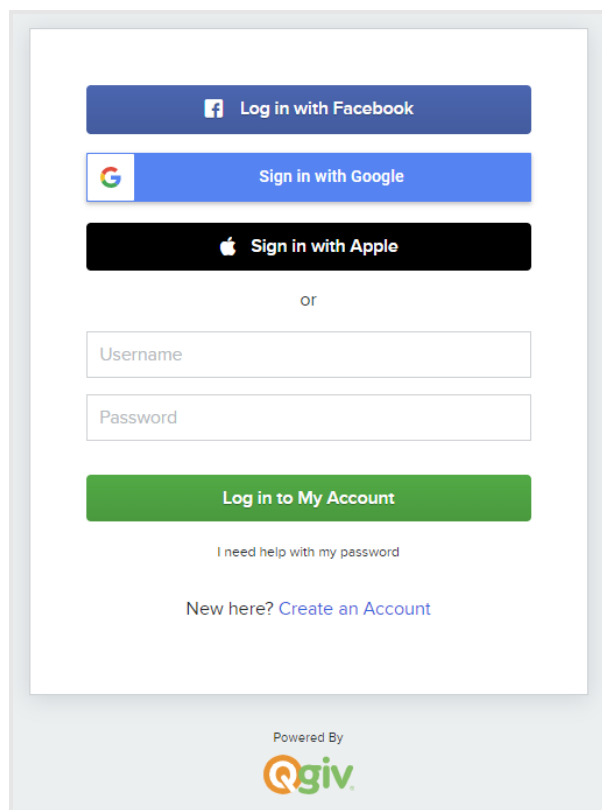
If your additional registrants agreed to a Fundraising Commitment during registration, you can view their commitment information by clicking **Edit Registration** on this screen.

Please note: Additional registrants' commitments will be associated with your payment method unless they log into their own Fundraising Dashboards and add a new payment method.

My Recurring Gifts

If you've set up any recurring gifts, you can manage them from the **My Recurring Gift** link. This link directs away from the Fundraising Center and will prompt you to log in to your Qgiv Donor Account.

Any gifts you've made to any organization through Qgiv will be housed here, provided you were logged into your donor account at the time the gift was made.

Our Team/Join a Team

If you're on a team, you can view your team's fundraising by clicking on the **Our Team** navigation item in your fundraising dashboard. If you're not part of a team and would like to join or create one, click the **Join a Team** button.
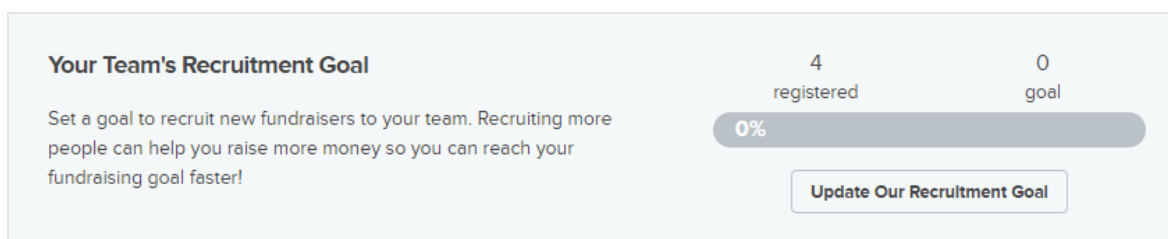
Our Team

This button will take you to your team fundraising dashboard, where you'll see totals for your entire team's efforts, as opposed to your personal dashboard where you see just what you've individually raised.

If you're a captain, you'd also be able to change your team's name and update the goal located under the thermometer in the same way it's done in the personal fundraising dashboard area.
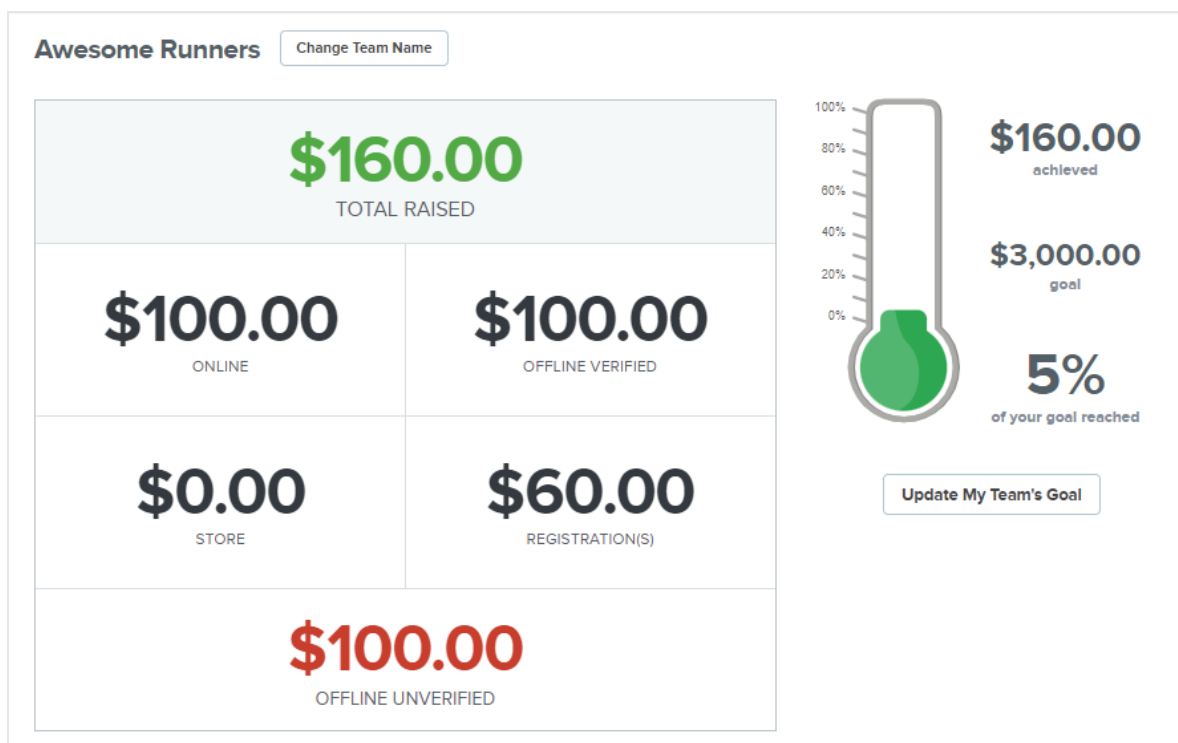
You'll also see a recruitment goal tool where you can enter the number of team members you're aiming for. A goal must be set before this will appear on your public-facing team fundraising page. Only team captains can update the recruitment goal.

As a member of a team, you'll also see the following additional options.

View Team Page	**Ask Others To Join**
Change Teams	**Leave Team**

View Team Page: This will display the Team Fundraising Page

Ask Others To Join: This will take you to the Share Your Event tab to create an email inviting others to join your team.

Change Teams: This will take you to an interface that allows you to search and join another team, leave your current team, and/or create a new team, as long as the host organization has enabled those options in the event's settings.

Leave Team: This will allow you to leave the team you are currently on. Once you choose this option, you'll see a pop-up asking you to confirm you'd like to leave the team. Click the **Yes, Leave** button to proceed.

If you choose this option, you'll always have the ability to join or create a team in the future.

Below that set of buttons, you have access to your **Team Information** and **Team Badges**.

Team Information	Team Badges				
My Team Donations	My Team Members				

From	Date	Type	Amount	Payment	Status
Susan Givens	08/16/22 2:41 pm	Offline	$100.00	Check	Unverified
Melissa Addams	08/16/22 1:43 pm	Online	$50.00	Visa	Verified
Kimber Participant	11/09/21 4:09 pm	Online	$50.00	Visa	Verified

On the Team Information tab, you can toggle between **My Team Donations** and **My Team Members** to view listings of anyone who has donated to the team and all fellow members of your team.

If you're a captain, in the **Team Members** area, you can promote and demote members of your team. If you promote someone to captain, they'll have the ability to update goals, edit the team page, and add offline team donations if enabled by the admin. Any team members with a yellow star are captains of the team.

If needed, you're also able, as a captain, to delete members of the team by using the red X in the **My Team Members** area.

	First Name	Last Name	Date Registered	Amount Raised	
📇	Kimber	Participant	11/09/21	$65.00	⊕ Promote ☆ ✖
📇	Parent	Participant	11/12/21	$15.00	⊕ Promote ☆ ✖
📇	Quincy	Givens	08/15/22	$65.00	⭐
📇	Quiggly	Givens	08/15/22	$15.00	⊕ Promote ☆ ✖

My Team Donations   My Team Members   + Add Cash or Check

Adding Team Donations

As a captain, you can add offline team donations, if enabled by your admin. If you have a cash or check donation to add, click the **+ Add Cash or Check** button and enter the information for your donor.

+ Add Cash or Check
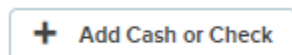
Please note: This option will only appear if the host organization allows offline gifts.

You can classify the gift as a check or cash gift. If it's a check, you can also record the check number for your records.

In the **Donor Information** section, the First and Last Name or Company Name (if it's a company donation) are required. All other fields are optional. If you choose to enter an email address, a thank-you message will be sent directly to your donor once you click the **Save Donation** button at the bottom. Any online donations made by donors who chose to remain anonymous will display as "Donor chose to be anonymous to the public" in your dashboard.

Save Donation   Cancel
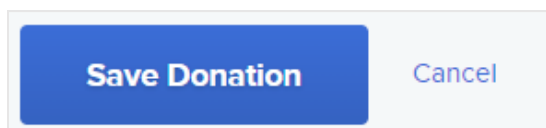
Join a Team

Clicking this button will take you to a page where you can search for and join existing teams or create a new team if you're registered as an individual.
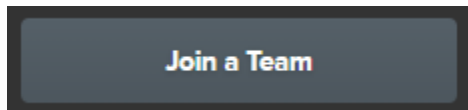
Searching teams is as easy as entering a search item in the **Search Teams** box. Once you locate the team you'd like to join, click the **Join Team** button to become a member of the team.


If you click on the + **Create a Team** button, you'll see a pop up that will allow you to enter a team name and fundraising goal.

Once you enter this information, click **Create** to create the new team.

You'll now be the captain of the new team and have access to the team dashboard within your fundraising center.

Powered By **Qgiv**®

Switch Profile

If you're managing fundraising pages for any additional registrants, you can switch between fundraising profiles at any time. Click **Switch Profile** to see a list of all the fundraising pages you have access to.
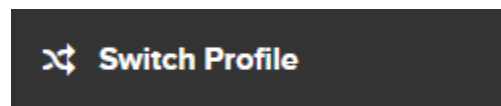
The profile you currently have selected will be highlighted and include an eye icon. To switch to another profile, just select the profile you want to use.
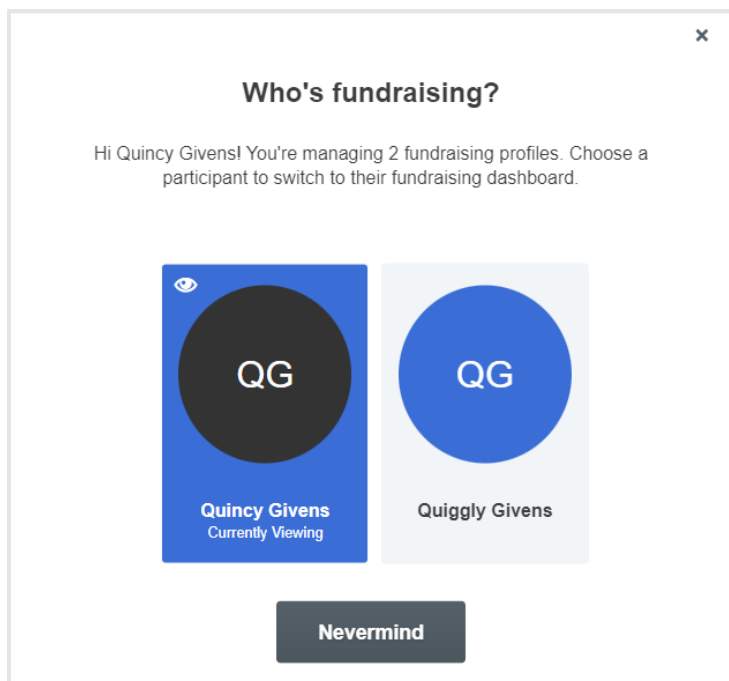
Now you can edit the fundraising page, add donations, share the event, or do anything else you can do with your own fundraising profile.

When you're finished setting up your fundraising page, you may log out by hovering over your name in the upper right-hand corner of the screen and choosing the **Logout** option from the drop-down menu. You can log in and make changes at any time.