

# DonorDrive User Guide

## Cycle for the Cause 2022 | Top 11 Tips and Tricks for DonorDrive

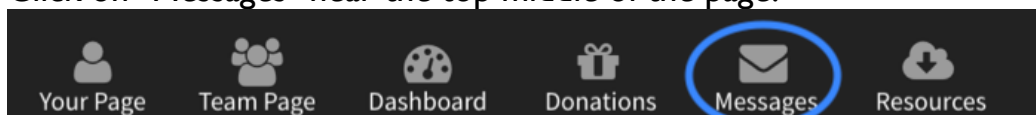
Committing to Cycle for the Cause is not a small task, and we are here to help prepare you every step of the way! One of the best tools we provide is our online fundraising platform, powered through DonorDrive.

Here are our top 11 tips to help you reach your fundraising goal with ease!

### I. Ask Friends to Donate

- a. DonorDrive comes equipped with a ton of messaging options that will streamline your fundraising outreach and follow-up. Here's how to get started:

- i. Log in to your personal fundraising page at [cycleforthecause.donordrive.com](https://cycleforthecause.donordrive.com).
- ii. Click on "Messages" near the top middle of the page.



- iii. Start under the "Contact List" tab.

- I. Click "Add Contact" to manually add potential donors' names and email addresses.



Add contacts from webmail, CSV or individually.

 Add Contacts

2. Click "Import Contacts" to quickly add multiple potential donors' names and email addresses by either linking your DonorDrive page to your email (Gmail, Yahoo, etc.) or by uploading a CSV file.

- iv. Then click "Compose a Message."

- I. Choose what kind of message and template you want to send (don't worry, you can customize the message later):



Create your message and send to your friends!

 Compose a Message

- a. Ask a Friend to Donate – a fundraising appeal to contacts that you've uploaded.

- b. Fundraising Update – email a fundraising update to individuals who have donated to your efforts.
  - c. Ask a Friend to Join – email an invitation to your contacts to join your C4C team.
- 2. Select the recipients you'd like to message from the contact list you've uploaded, or enter email addresses manually.
- 3. Customize your message and subject line.
- 4. Send your message immediately, save the message draft, or send yourself a test message to make sure everything looks correct.
- v. Finally, check out "Sent Messages" to see who responded and how many donations your outreach efforts secured. You can even resend messages to individuals who did not respond to your first attempts.

## 2. Donation Report

- a. Knowing who donated to you and how much they gave is an important element in achieving fundraising success. It lets you know who has responded to outreach efforts (AKA who to thank) and who you might need to follow up with. DonorDrive makes this easy by providing donation reports:
  - i. Log in to your personal fundraising page at [cycleforthecause.donordrive.com](https://cycleforthecause.donordrive.com).
  - ii. Click on "Your Page" near the top left of the page.
  - iii. Click on the "Donations" tab near the middle of the page.



- iv. Click on "Download Donor Report" right underneath.

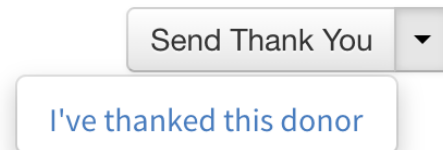
 [Download Donor Report](#)

- v. You've now successfully downloaded a donation report that tells you who has donated, the amount, when they made their donation, and the best email where you can reach them to say thank you.

# DonorDrive User Guide

## 3. Thanking Donors

- a. Thanking your donors is a crucial part of fundraising success. It lets them know how much you appreciate their generosity, and will inspire them to keep supporting you in years to come:
  - i. Log in to your personal fundraising page at [cycleforthecause.donordrive.com](https://cycleforthecause.donordrive.com).
  - ii. Click on “Your Page” near the top left of the page.
  - iii. Click on the “Donations” tab near the middle of the page.
  - iv. Next to each donation you will find a “Send Thank You” button, which will open up a pop-up box that allows you to send a thank you message using our pre-filled templates. You can also compose a custom thank you message to be emailed directly to that donor.
  - v. **Bonus Tip:** Already thanked your donor another way? Use the arrow next to the “Send Thank You” button and choose “I’ve thanked this donor” to help you keep track of who has been thanked and who still needs to be contacted.



## 4. Set up a Facebook Fundraiser

- a. Facebook Fundraisers have changed the game when it comes to peer-to-peer fundraising. DonorDrive has made things even easier by allowing you to set up a Facebook Fundraiser that links directly to your personal fundraising page! Here is how to set up yours:
  - i. Log in to your personal fundraising page at [cycleforthecause.donordrive.com](https://cycleforthecause.donordrive.com).
  - ii. Click on “Welcome” in the top right corner.
  - iii. Click on “Account” from the drop down menu.
  - iv. Select “Communication Settings” and click “Connect” under Connect to Facebook (follow the steps that pop up to complete this).
  - v. Once you’ve linked your Facebook account to DonorDrive, click “Your Page” at the top left of the DonorDrive platform.
  - vi. Click on the “Settings” tab near the middle of the page.



- vii. Click “Create a Facebook Fundraiser.”

# DonorDrive User Guide

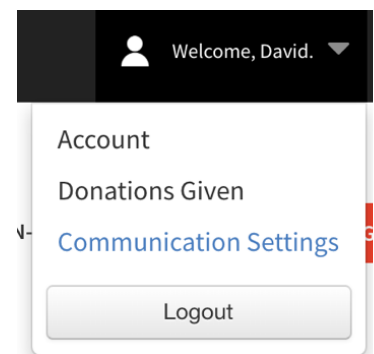
- viii. A pop-up will appear that says “Cycle for the Cause would like to manage your Fundraisers.” Click “OK.”
- ix. You have now created a Facebook Fundraiser that is linked directly to your personal fundraising page and can be managed through your personal Facebook account!
- x. Please note: Every participant can only create one Facebook Fundraiser per event through DonorDrive. If you choose to end your Facebook Fundraiser early, you will not be able to create another one that is linked directly to your DonorDrive page for this year’s Cycle for the Cause.

## 5. Custom URL

- a. Want a custom website URL for your personal fundraising page that’s easy to remember and even easier to share? DonorDrive has you covered with these easy steps:
  - i. Log in to your personal fundraising page at [cycleforthecause.donordrive.com](https://cycleforthecause.donordrive.com).
  - ii. Click on “Your Page” near the top left of the page.
  - iii. Click on the “Settings” tab near the middle of the page.
  - iv. Next to “Page Link” click on the “Customize” button.
  - v. Enter the text or numbers you prefer to appear at the end of your [cycleforthecause.donordrive.com/](https://cycleforthecause.donordrive.com/) link.
  - vi. Click “Save Changes” and you’re all set.
  - vii. Now folks can find your page at [cycleforthecause.donordrive.com/](https://cycleforthecause.donordrive.com/)\_\_\_\_\_.

## 6. Your Personal Donation History

- a. If you’re participating in the Cycle for the Cause, you likely enjoy supporting others’ fundraising efforts just as much as you like receiving support for yours. Want to check out your history of gifts you’ve made to other individuals participating in the Cycle for the Cause?
  - i. Log in to your personal fundraising page at



# DonorDrive User Guide

[cycleforthecause.donordrive.com](http://cycleforthecause.donordrive.com).

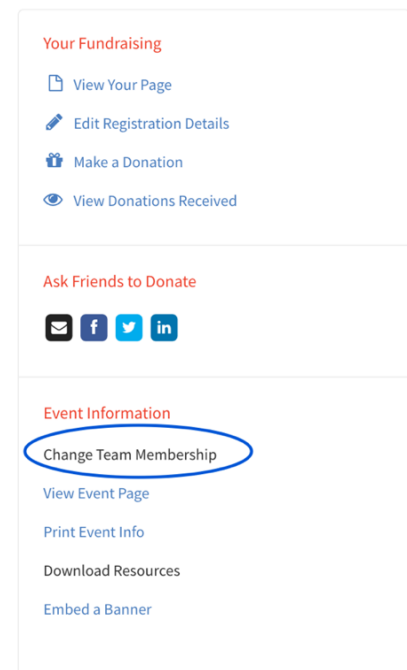
- ii. Click on “Welcome” in the top right corner.
- iii. Click on “Account” from the drop down menu.
- iv. Select “Donations Given” from the new page to view all of the donations you have made to your fellow C4C participants.



## 7. Change Your Team Membership

- a. Accidentally join the wrong team when you registered? Or maybe you met some really cool folks at a Cycle for the Cause event and now want to join their team? Follow these steps to get yourself on the same team as your personal Cycle family:

- i. Log in to your personal fundraising page at [cycleforthecause.donordrive.com](http://cycleforthecause.donordrive.com).
- ii. Under Event Information on the right hand side of the page, click “Change Team Membership.”
- iii. Here you can choose to:
  1. Continue as an individual
  2. Join another team
  3. Create a new team



## 8. Print Event Info

- a. Need a quick summary of your fundraising efforts and success? Try printing out an Event Info summary:
  - i. Log in to your personal fundraising page at [cycleforthecause.donordrive.com](http://cycleforthecause.donordrive.com).
  - ii. Click “Print Event Info” underneath “Event Information” on the right hand side of the page.

### Event Information

Change Team Membership

View Event Page

Print Event Info

Download Resources

## 9. Stream Fundraising

- a. DonorDrive has introduced a whole new way to fundraise effectively online, while simultaneously sharing your Cycle for the Cause experiences live with your donors, called streaming. They even built a custom guide for the Cycle for the Cause participants to learn all about how to fundraise through streaming. Check it out and, if you decide it's right for you, here is how to quickly set up your own stream:
  - i. Log in to your personal fundraising page at [cycleforthecause.donordrive.com](https://cycleforthecause.donordrive.com).
  - ii. Click on the "Settings" tab near the middle of the page.
  - iii. Click "Add a stream to your page."
  - iv. Choose your service and enter your username.
  - v. Note: YouTube requires you to enter the full URL to the live video, not your YouTube username.
  - vi. Click "Save Changes" and you're all set.
  - vii. Now simply share your page with your networks whenever you're about to start a stream (through platforms like Twitch or YouTube) on a training ride, fundraising event, or even on the Ride and watch the

### Stream your fundraising ?

☒ Add a stream to your page

#### Service

Twitch

#### Username

#### Add a graphic overlay to your stream!

<https://cycleforthecause.donordrive.com/index.cfm?fuseaction=donorDrive.streamingOverlay&>

Copy

Paste this link into your streaming software (like Streamlabs OBS) so viewers see donation alerts and progress toward your goal! [See a preview](#)

donations roll in!

## 10. Fundraising Milestones

- a. Set up personal fundraising milestones to help inspire your network to donate! Motivate your supporters to donate by sharing personal fundraising goals through DonorDrive on the way to meeting your overall fundraising goal. Follow these easy steps to set up your personal fundraising milestones today:
  - i. Log in to your personal fundraising page at [cycleforthecause.donordrive.com](https://cycleforthecause.donordrive.com).
  - ii. Click on “Your Page” near the top left of the page.
  - iii. Click on the “Add a Milestone” button beneath your fundraising thermometer.
  - iv. Enter the preferred number and text under “Milestone Amount” and “Milestone Description” to appear on your fundraising thermometer.
  - v. Click “Save Milestone” and you’re all set.

Add milestones to celebrate progress on the way toward your fundraising goal!

[Add a Milestone ▶](#)

## 11. Fundraising Incentives

- a. Looking for a new way to motivate your network to donate? Spice up your personal fundraising by offering your donors incentives. DonorDrive now allows you the opportunity to add your very own personal incentives for donations to anyone visiting your page. Add incentives like baked goods, hand-knitted hats, or a social media shout out, all in the name of activism! Here’s how you can set up your own personal incentives:
  - i. Log in to your personal fundraising page at [cycleforthecause.donordrive.com](https://cycleforthecause.donordrive.com).
  - ii. Click on “Your Page” near the top left of the page.
  - iii. Click on the “Add an Incentive” button beneath your fundraising thermometer.
  - iv. Enter the preferred number and text

Incentives

Set up donation incentives to encourage donors and reward them for their support!

[Add an Incentive ▶](#)

# DonorDrive User Guide

- under “Donation Amount” and “Incentive Description” to appear on your personal fundraising page.
- v. You can also add specific incentive quantities, start and end dates, and request additional information from donors (such as their mailing addresses so you know where to send their incentive).
  - vi. Want to add a photo? Upload a photo of your incentive by clicking “Upload An Image.”
  - vii. Click “Save Incentive” and you’re all set.
  - viii. Now folks will get to see the amazing incentives they can earn by making a donation to your personal fundraising page!

By using all of the DonorDrive tips and tricks above, you will become a fundraising all-star in no time. Thank you so much for so much for participating in Cycle for the Cause—we’re already so proud of you!