



AN INTRODUCTION TO HAKU

NAVIGATING YOUR FUNDRAISER ACCOUNT





FUNDRAISER GUIDE

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SUPPORT

01

DASHBOARD





DASHBOARD

50 TCS NEW YORK CITY MARATHON

Dashboard Donors Campaigns Public Page Settings

Veronica Rivera's Fundraising Account
TCS NEW YORK CITY MARATHON FUNDRAISING
YOUR PUBLIC PAGE
<https://stg.haku.ly/c2ca1bf7> Share

DONATION PAGE
<https://stg.haku.ly/99fdf6a4> Share

\$4,800.00 RAISED	\$5,000.00 GOAL	\$200.00 DONATIONS NEEDED
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ACTIVITY

- Jeff Bezzo donated \$2,000.00 [Send Thank You](#)
- 149 days left to fundraise
- Reach more people by creating an [email campaign](#)
- You have no donations from postings in social media. Try posting a message using [Facebook](#) or [Twitter](#)
- You are 96% of the way there. Keep pushing!

PROMOTE

- Share on Facebook
Share your fundraising page with all your facebook friends! [Connect and Share](#)
- Share on Twitter
It's easy! We will even draft the post for you. Just review and send! [Connect and Tweet](#)
- Download QR Codes
Download QR codes so people can more easily access your donation page and fundraising page by simply scanning the code with their phone. [Download and Share](#)
- Share through email
Send a quick note to your friends to support you. [Send Email](#)

We are online!



The top of the dashboard allows fundraisers to view their donations and progress in one easy-to-read view. Fundraisers are also able to share their public and donation pages via SMS or Email.

A screenshot of a fundraising dashboard. At the top right, there is a user profile for 'Mary Johnson' with a question mark icon. Below this, the account name 'Mary Johnson's Fundraising Account' is displayed next to a landscape photo. Underneath, it says 'SAMPLE MARATHON' and 'YOUR PUBLIC PAGE' with a shareable link 'https://stg.haku.ly/c876769d' and a 'Share' button. To the right, it says 'DONATION PAGE' with a shareable link 'https://stg.haku.ly/6bdee8c2' and a 'Share' button. At the bottom, three boxes show: '\$222.00 RAISED', '\$500.00 GOAL', and '\$278.00 DONATIONS NEEDED'.



ACTIVITY

\$ Carol Edwards donated \$40.00 [Send Thank You](#)

📅 60 days left to fundraise

👤 Reach more people by creating an [email campaign](#)

👍 You have no donations from postings in social media. Try posting a message using [Facebook](#) or [Twitter](#)

🕒 You are 44% of the way there. Keep pushing!

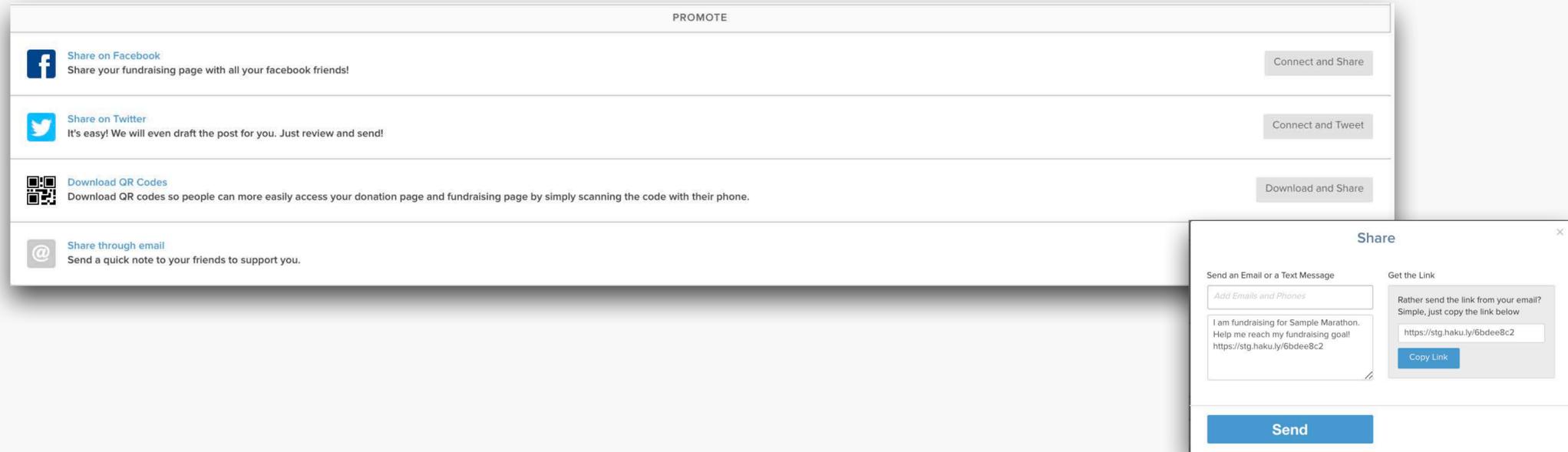
The Activity section of the dashboard is a useful snapshot of the fundraiser's current progress.

TRACK PROGRESS AND TIME LEFT TO FUNDRAISE

- View most recent donation and send a thank you directly to that donor.
- See how many days are left to fundraise and reach your goal.
- View percentage progress in real time.

SOCIAL MEDIA AND CAMPAIGNS

- Reach out to more donors by sending an email campaign.
- Track donations made through social media channels.



The Promote section allows users to have social media sharing and a quick email builder at their fingertips.

SHARE TO DIFFERENT SOCIAL MEDIA CHANNELS

- Simply connect Facebook or Twitter and make a post without having to leave your fundraiser account.
- Posts made from your fundraiser account will show in Donors once people have made donations.

QUICK EMAILS

- Sending an email through the dashboard allows you to create an email to send to anyone you would like.
- You can also use any link in your fundraising account to use in your own email. Any of these links will also be tracked in the Donors tab.

QR CODE

- Users can download a QR code to have immediate access to their public page.

02

DONORS





DONORS

MY DONORS

DONATION SOURCES

Legend: Email Campaign, Facebook, Other

CAMPAIGNS

Legend: Donate today!

Find a donor

Send Thank You

<input type="checkbox"/>	JUAN MERCADO jmercado@mercadomail.com Donated on 04/02/2020 at 01:43 PM	DONATED \$100.00	SOURCE Email Campaign	<input type="button" value="Send Thank You"/>
<input type="checkbox"/>	LESLIE JORDAN jordan1229@lesliejordan.com Donated on 04/02/2020 at 01:42 PM	DONATED \$25.00	SOURCE Facebook	<input type="button" value="Send Thank You"/>
<input type="checkbox"/>	BEN JONES bj3048@jonesb.com Donated on 04/02/2020 at 01:40 PM	DONATED \$25.00	SOURCE Facebook	<input type="button" value="Send Thank You"/>
<input type="checkbox"/>	EMILY JOHNSON ej42020@johnsonmail.com Donated on 04/02/2020 at 11:52 AM	DONATED \$150.00	SOURCE Other	<input type="button" value="Send Thank You"/>



The Donors tab allows users to view a snapshot of their donation sources. Donations made through social media, and campaigns will be shown here.





The Donor tab provides a breakdown of every donation along with its source, amount, and donor information.

<input type="checkbox"/> Find a donor				<input type="checkbox"/> Send Thank You	<input type="button" value="Export"/>
<input type="checkbox"/>	JUAN MERCADO jmercado@mercadomail.com Donated on 04/02/2020 at 01:43 PM	DONATED \$100.00	SOURCE Email Campaign	<input type="button" value="Send Thank You"/>	
<input type="checkbox"/>	LESLIE JORDAN jordan11229@lesliejordan.com Donated on 04/02/2020 at 01:42 PM	DONATED \$25.00	SOURCE Facebook	<input type="button" value="Send Thank You"/>	
<input type="checkbox"/>	BEN JONES bj3048@jonesb.com Donated on 04/02/2020 at 01:40 PM	DONATED \$25.00	SOURCE Facebook	<input type="button" value="Send Thank You"/>	

- Send Thank You Emails to individual or multiple donors at once.
- Export a list of your donors to a spreadsheet.
- See all donations amount and sources.

03

CAMPAIGNS





Peer-to-Peer fundraising is most successful when the fundraiser can make a meaningful connection with each potential donor

DONOR EDUCATION & COMMUNICATION

- Fundraisers should take every opportunity to educate potential donors on the reasons why they should donate and the impact of their donation.

TARGETED OUTREACH

- Fundraisers should tailor their outreach to their audiences – for example, an email to friends should be different than an email to family members or coworkers.



To create a campaign simply click "CREATE NEW" and you will be redirected to the campaign builder. After importing or manually entering your contacts you can start building your campaign. Users can preview their message by clicking "PREVIEW & TEST". The final screen allows users to review their settings before sending the campaign.

The image shows a screenshot of a web-based campaign builder interface. The main form has four sections: 'CAMPAIGN NAME' with a text input containing 'Friends and family email'; 'SUBJECT LINE' with a text input containing 'Please help my cause'; 'REPLY TO EMAIL' with a text input containing 'maritest@test.com'; and 'MESSAGE' with a rich text editor containing a blank space and a toolbar with icons for Bold (B), Italic (I), Underline (U), and a link icon. Overlaid on the bottom right is a 'Preview Donate -Friends' window. This window shows a desktop and a mobile phone view of the campaign message. The desktop view includes a header image, the text 'SUPPORT MARY JOHNSON Donate today!', a 'Donate Now!' button, and a section titled 'HELP SPREAD THE WORD' with 'Share on Facebook' and 'Share on Twitter' buttons. The mobile view shows the same content adapted for a smaller screen.

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PUBLIC PAGE





PUBLIC PAGE

Register to Participate | Need Help?

MARY'S FUNDRAISING PAGE

Donate | Facebook | Twitter | Email

ABOUT

\$522.00 RAISED
60 days left

100% | \$500.00 goal

Donate

SAMPLE MARATHON
Brought to you by [Sample Marathon Foundation](#)

A MESSAGE FROM MARY
Please support my fundraising efforts for the Sample Marathon. No donation is too small. Please click on the donate button!

DONORS

JUAN MERCADO	\$100.00
LESLIE JORDAN	\$25.00
BEN JONES	\$25.00
IN MEMORY OF PETER JOHNSON	\$150.00
CAROL EDWARDS	\$40.00

See More



Public Pages have customizable content such as pictures, videos, and messages allowing for a unique fundraising experience catered specifically to you.

CHANGE YOUR BANNER PHOTO
Preferred size should be 1600x500 pixels

Upload Image
CLEAR IMAGE

ADD PHOTOS OR VIDEOS TO DISPLAY
Preferred size should be 358x250 pixels, Images are limited to 10MB or less, videos are limited to 100MB or less

DRAG FILE HERE OR
choose file

GEFVQKBBSLAMPK...
REMOVE CHANGE

PAGE NAME
Mary's Fundraising Page

FUNDRAISING GOAL
\$ 500.00
You have to raise a minimum of \$500.00.

A MESSAGE TO YOUR DONORS

B *I* U

Please support my fundraising efforts for the Sample Marathon. No donation is too small. Please click on the donate button!

Preview Your Page

MEANINGFUL & ACCESSIBLE PUBLIC PAGE

- Helps you get both their message & your message out to potential donors.
- Adding personal pictures, videos, & stories makes the message more personal & engaging.
- Mobile-friendly tools make it easier to access and easier to donate on the go.

05

SETTINGS





SETTINGS

?

Mary Johnson

 Upload Your Photo
[Change Image](#)
[CLEAR IMAGE](#)

Basic Info

* NAME
Mary Johnson

* EMAIL

PHONE NUMBER

Change Password

CURRENT PASSWORD

NEW PASSWORD

Choose a password that's a least 8 characters

CONFIRM PASSWORD

[Back](#) [Save Changes](#)



In the Settings tab users are able to upload a photo of themselves, change basic information, and reset their password.

A screenshot of a user settings page for 'Mary Johnson'. The page is divided into two main sections: 'Basic Info' and 'Change Password'.
Basic Info:
- **Upload Your Photo:** A circular profile picture placeholder with a 'Change Image' button and a 'CLEAR IMAGE' link below it.
- *** NAME:** Three input fields containing 'Mary', 'MI', and 'Johnson'.
- *** EMAIL:** One input field containing 'maritest@test.com'.
- **PHONE NUMBER:** One input field containing '(305) 838-8999'.
Change Password:
- **CURRENT PASSWORD:** One input field with placeholder text 'Current Password'.
- **NEW PASSWORD:** One input field with placeholder text 'New Password'. Below it is a note: 'Choose a password that's a least 8 characters'.
- **CONFIRM PASSWORD:** One input field with placeholder text 'Confirm Password'.
At the bottom of the page, there is a 'back' button on the left and a 'Save Changes' button on the right.

06

SUPPORT



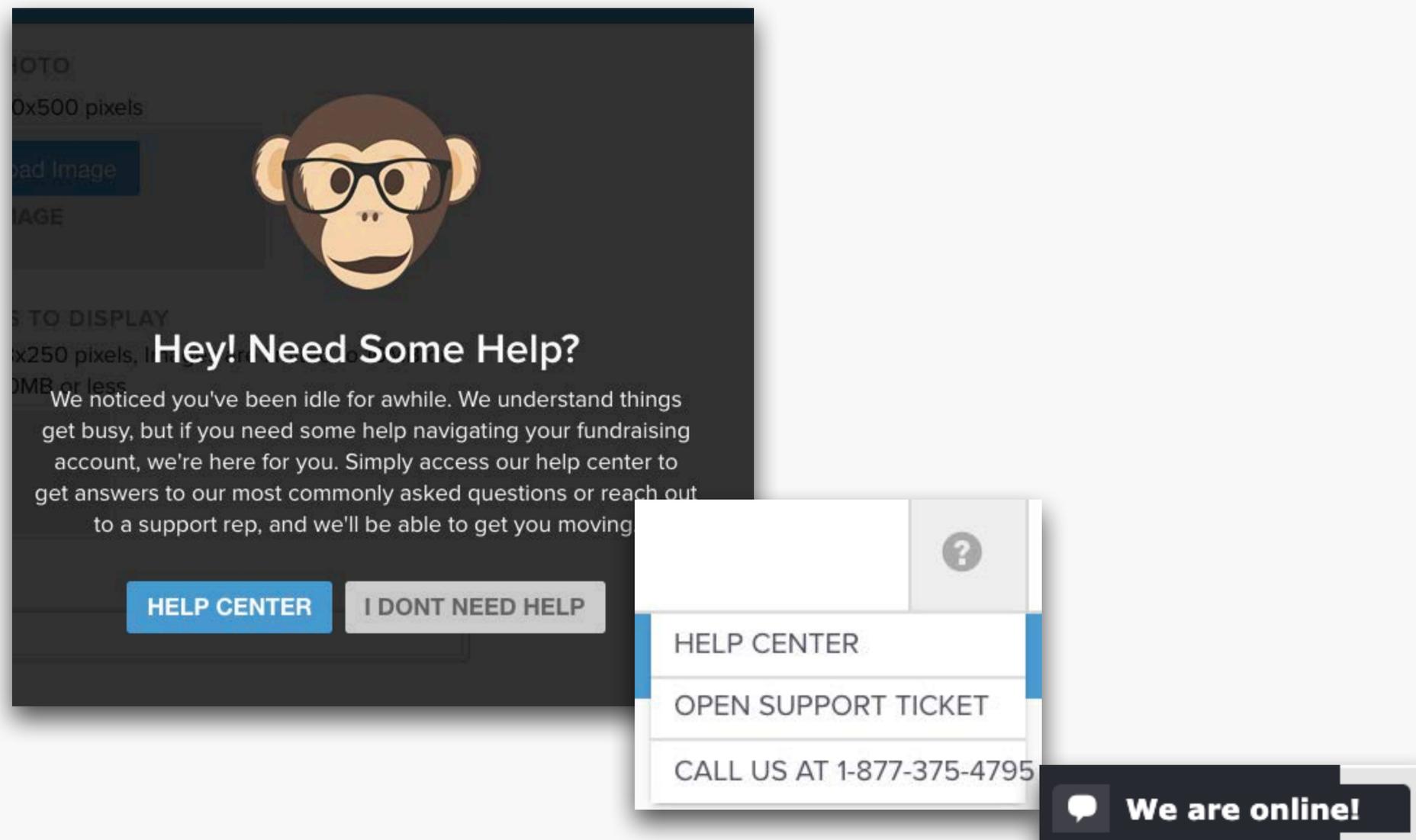
haku

SUPPORT





Accessing Support is at your fingertips. If you have any questions haku offers multiple options to reach someone willing to help. Call, email, or even live chat all from your fundraising account.



SUPPORT FOR THE LONG RUN

- The question mark by your name at the top right allows you different support options directly from your account.
- When you are idle on your page for a few moments the "Hey! Need Some Help?" will appear.
- A chat feature is also available on the bottom left of your account.