2024 Civitan Breakthru Golf Tournament Participant Center Guide

Table of Contents

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How to Access Your Participant Center Guide

What is the Participant Center?
The Participant Center is the online portal where you can check your fundraising progress, send email solicitations and thank you's, and update your Personal Fundraising Web Page.

On your Personal Fundraising Web Page, you can share your personal story, add a photo or a link to a YouTube video, and even add a blog. Then, you can share your webpage address with family and friends asking them to join you at the event or support your fundraising effort through a generous gift.
For our team captains, the Participant Center is a great place to send encouragement to your team members by emailing them reminder emails and best practices as the event date draws closer.

Logging In From the Main Website
Step-1 Visit your event's main website: https://secure2.convio.net/civint/site/TR?fr_id=1191&pg=entry
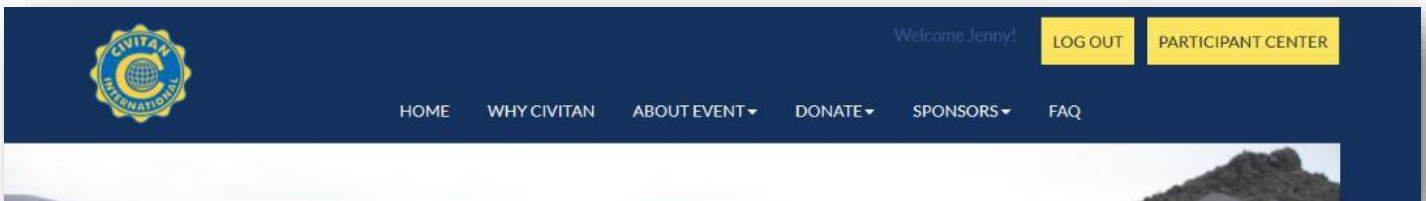

STEP 2- Enter your username and password in the login area at the top of the page and tap enter on your keyboard.

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B r e a k t h r u   G o l f   Benefit
P a r t i c i p a n t   C e n t e r   G u i d e
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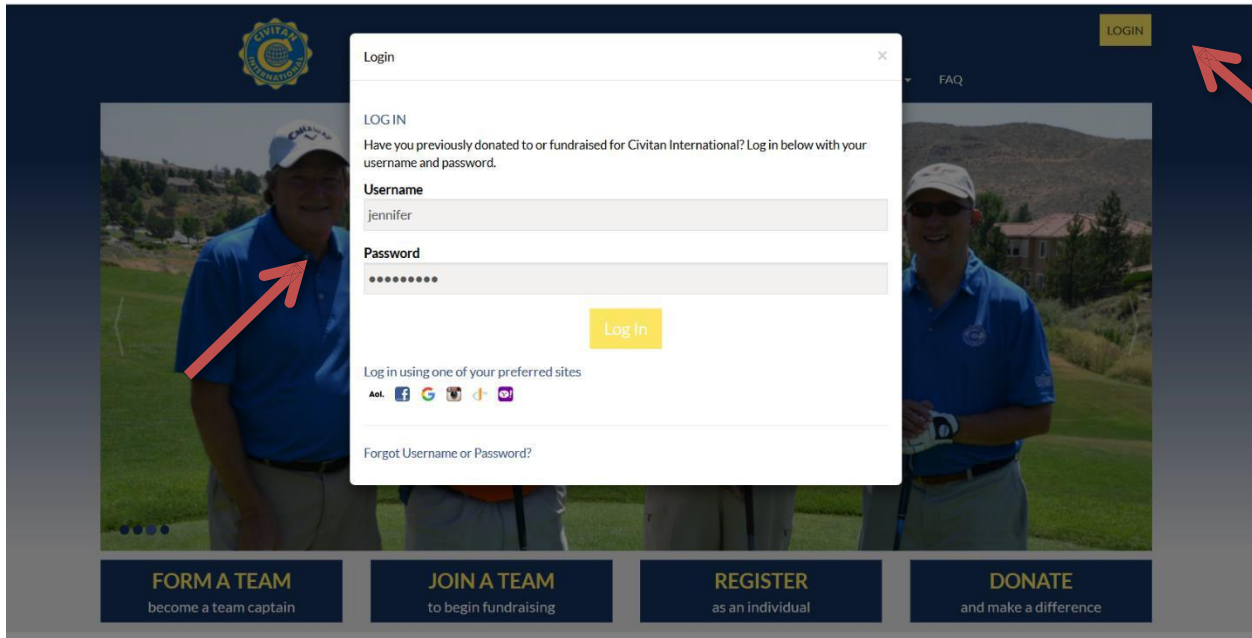
STEP 3- Once you login, you'll see a welcome message at the top. Then, click "Participant Center."

STEP 4-Viola! Your Participant Center will open, and you can begin to access its features.

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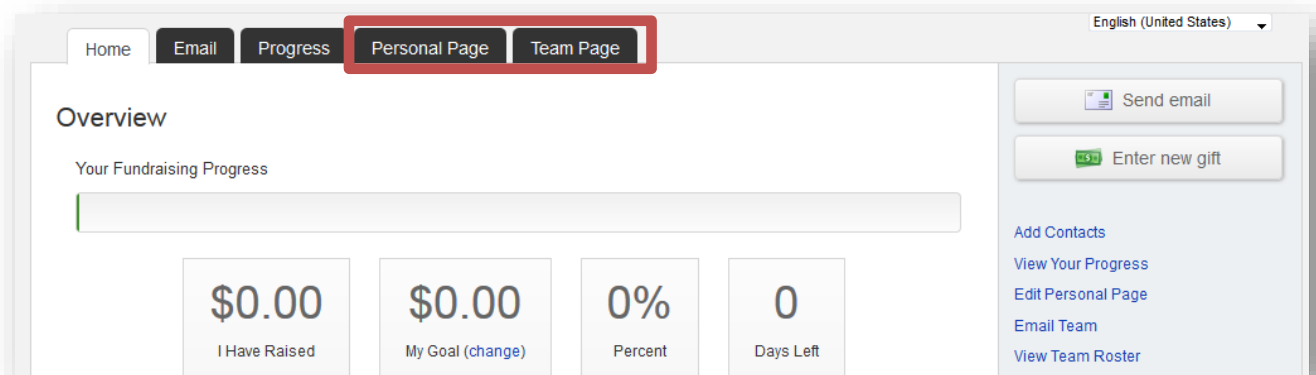P a r t i c i p a n t C e n t e r G u i d e
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How to Edit Your Personal or Team Page Content

Things to consider:

- Personal and Team Fundraising Pages have default content when you register for an event. However, we highly recommend that you personalize your page(s) to tell your own (or your team's) story and why the event is important to you.

- Only team captains will have access to edit the Team Fundraising Page from their Participant Center.

STEP 1- Login to your Participant Center

STEP 2- Click "Personal Page" or **"Team Page"** depending on which page you want to edit (Remember if you are not a Team Captain, you will not see the Team Page tab.

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The Parts of the Page

1. Click to preview your page in a new window.
2. Click to edit your web address to share with others.
3. Edit the heading/title of your page.
4. Edit your message/personal story that appears on the page.
5. Click "Preview" to view your edits in a new window. Click "Save to publish them and make them "live" on the website
6. Share your page link with friends on Facebook or Twitter

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B r e a k t h r u   G o l f   Benefit
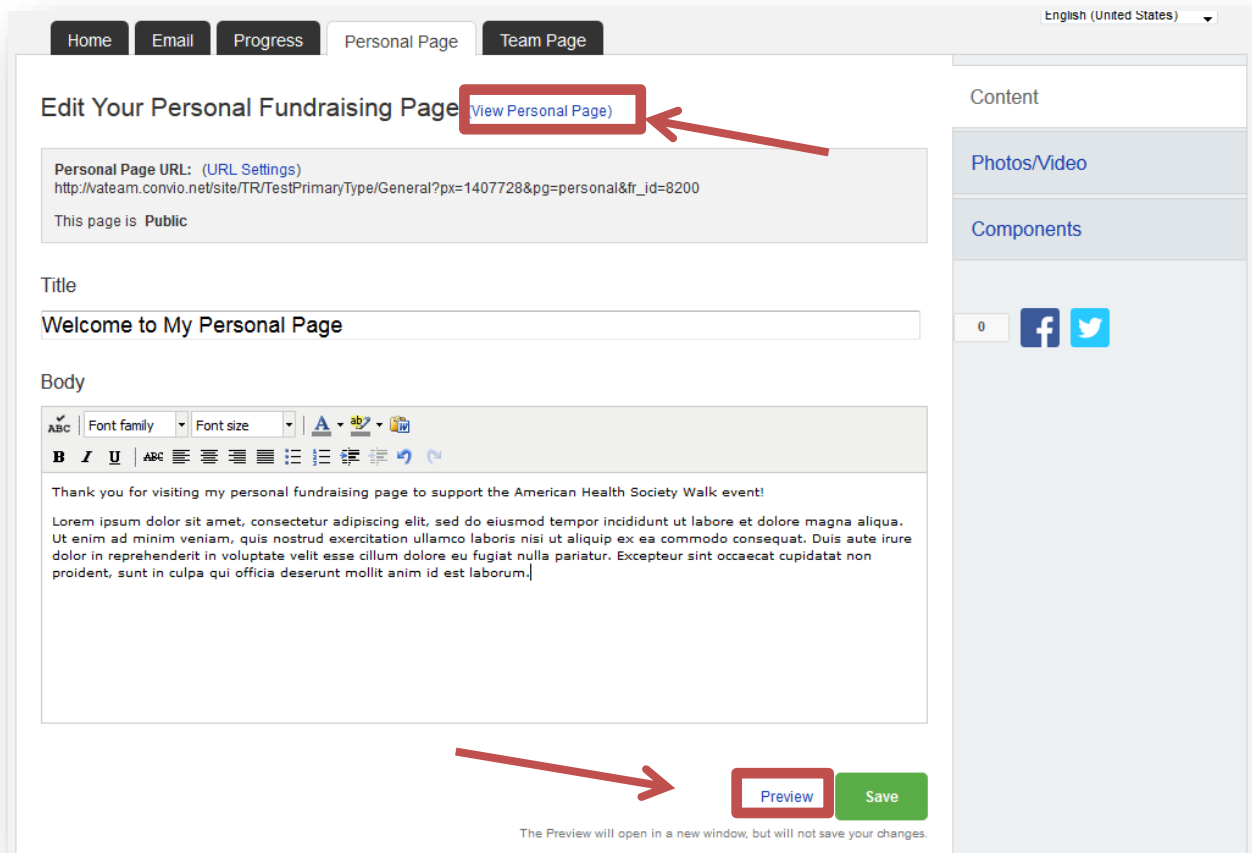P a r t i c i p a n t   C e n t e r   G u i d e
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STEP 3-Edit your content

You can edit the **TITLE** and **BODY** of your personal and/or team fundraising page content. Simply enter your text in the appropriate field.

STEP 4-Preview and save your changes

1. Click **"Personal Page"** or **"Preview"** to open a new tab (see red arrows below) with your Personal Page to review your changes on your site.
2. Click **PREVIEW** at the bottom of the page to view your edits in a new window. Click **SAVE** to publish those changes and make them "live" on the webpage for the public to view.

(Follow the same steps for your Team Page if you made changes there. Reminder:only Team Captains will see the link to "Team Page" in their Participant Centers.)


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How to Upload a Photo or Video

Some things to consider:

- Please be sure your photo is saved as a JPG, GIF, or PNG file type.
- Files must be smaller than 4 megabytes.
- Only YouTube video links are supported
- You may choose either a photo or a video link, but not both.
- You can add a different photo and video link on your Personal Fundraising Page, and if you're a team captain, on your Team Fundraising Page.

STEP 1- Login to your Participant Center

**STEP 2- Click "Personal Page"** or **"Team Page"** depending on which page you want to edit.
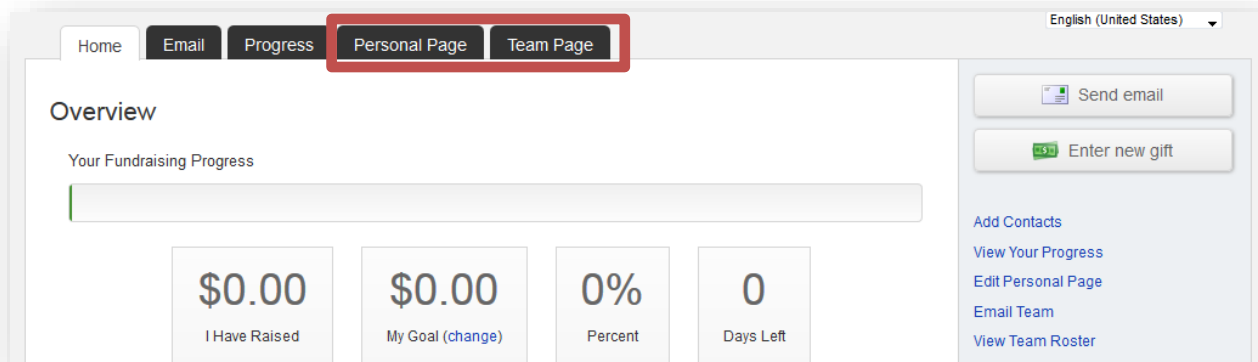
STEP 3-On the links on the right, click "Photo/Video"

B r e a k t h r u G o l f Benefit
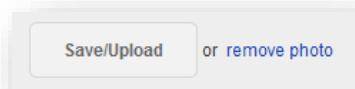P a r t i c i p a n t C e n t e r G u i d e
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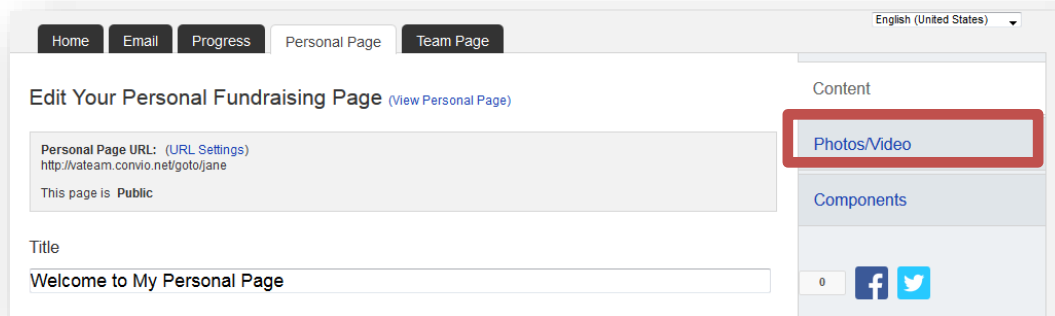
For a PHOTO

7. Click the button next to **Photo.**
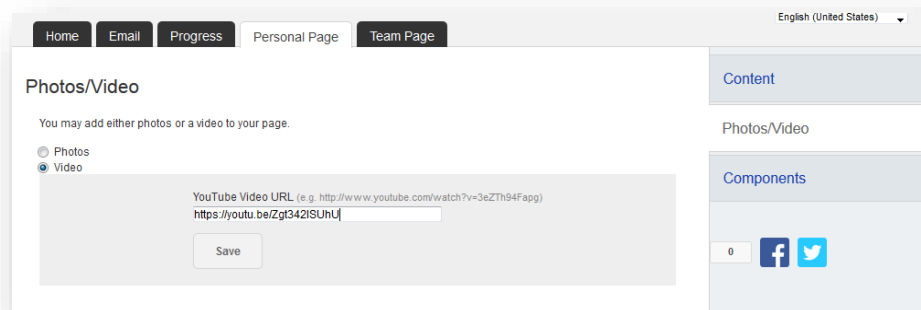8. Click the **Browse** button.

Locate the file on your local computer or shared network resource and click it to display its name in the **Find/Open File** window. A green message saying, **"The Photo Information Was Updated"** will display across the top of the page if your photo successfully uploads.
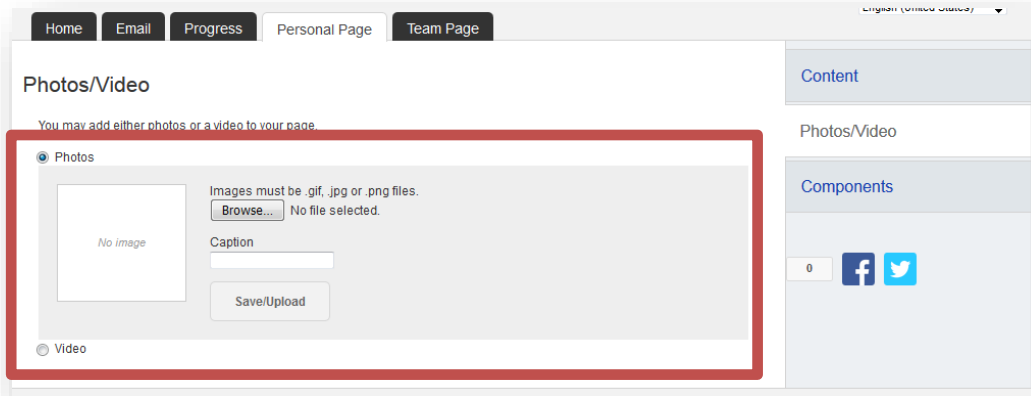
If you wish to change the photo click the **Remove Photo** link in the **Photo** area. Then repeat the steps above.
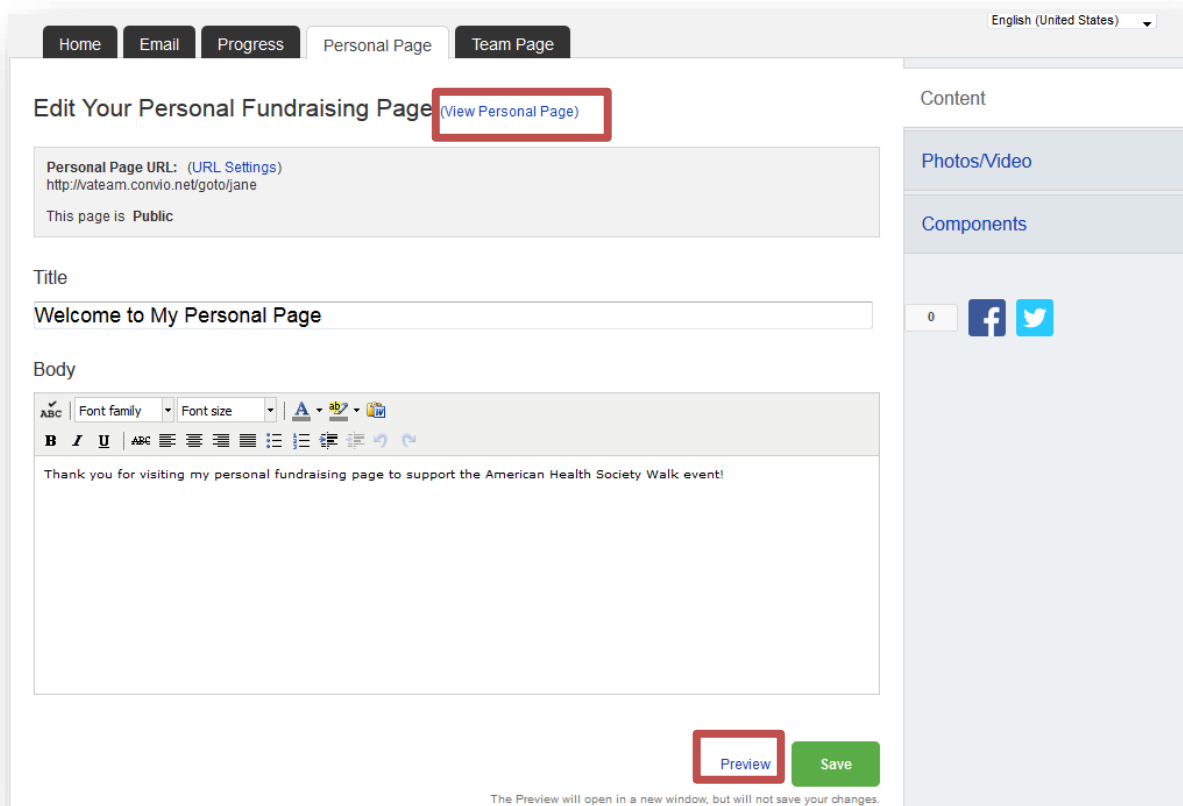

For a Video

1. Click the button next to **Video.**

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2. Enter a **YouTube website address** in the text entry field and click **"Save."**

STEP 4-Preview Your Changes

1. Click the **"Personal Page"** tab at the top or click **"Content"**
2. Click **"View Personal Page"** or **"Preview"** to open a new tab (see red arrows in image on next page) with your Personal Page to review your changes on the site.

(If you are a team captain, follow the same steps for your Team Page if you made changes there.)

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How to Upload Contacts by CSV File

What is a CSV File?

A CSV, or comma-separated values, is a type of file that allows you to enter data in a table-structured format or spreadsheet. You will need a program like Microsoft Excel or Windows Notepad to create the file to upload in your Participant Center.

If you have a lot of email contacts that you'd like to migrate into your Participant Center, creating a CSV file for upload may be easier and save you time instead of manually entering each email contact.

NOTE: *Yahoo and Gmail email users can directly import their contacts into the Participant Center without using a CSV file. View the next section to learn how.*

Step-1 Prepare your CSV file

A. Export your contacts list or address book from your email service that you use (follow your service provider's instructions to complete this step)
B. Create a new CSV file using a text editor (such as Microsoft Windows Notepad) or a spreadsheet application (such as Microsoft Excel) that lets you save a document as a .CSV file type.
C. Create three column headings: First, Last, Email
D. Then, on the subsequent lines, enter the first name, last name and email address of each contact. (You can copy and paste this from the export that you did in Step 1 A.
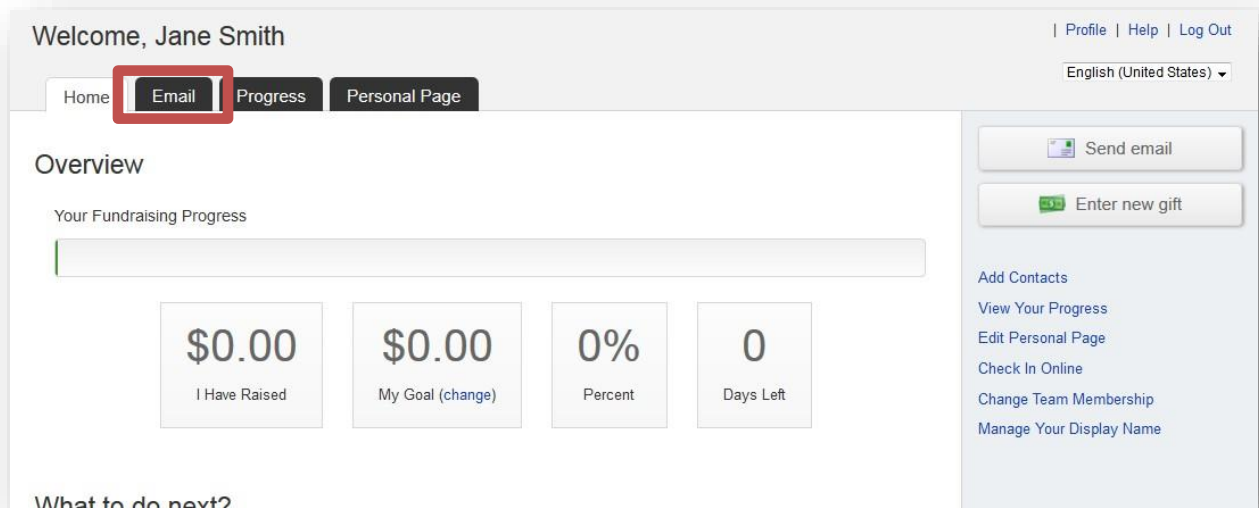
For example, your document would look like:

```
First, Last, Email
Jane, Smith, janesmith@email.com
John, Smith, johnsmith@email.com
```
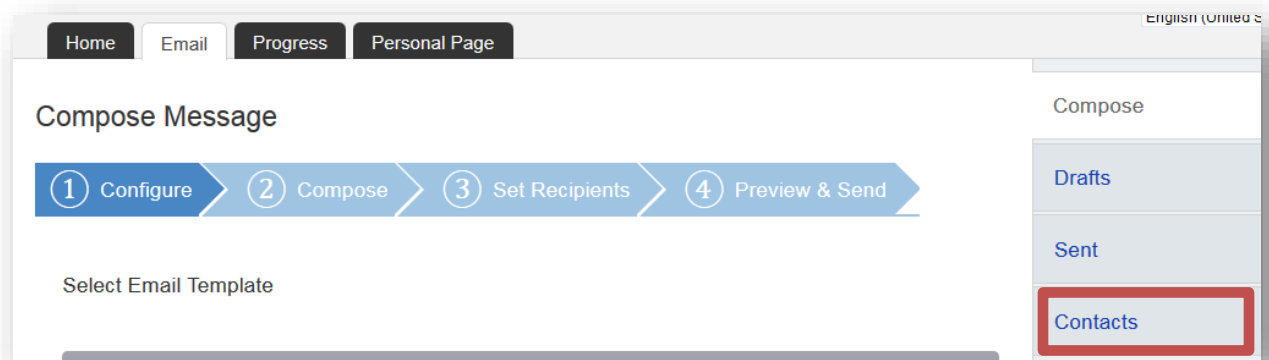
-CONTINUE ON NEXT PAGE-
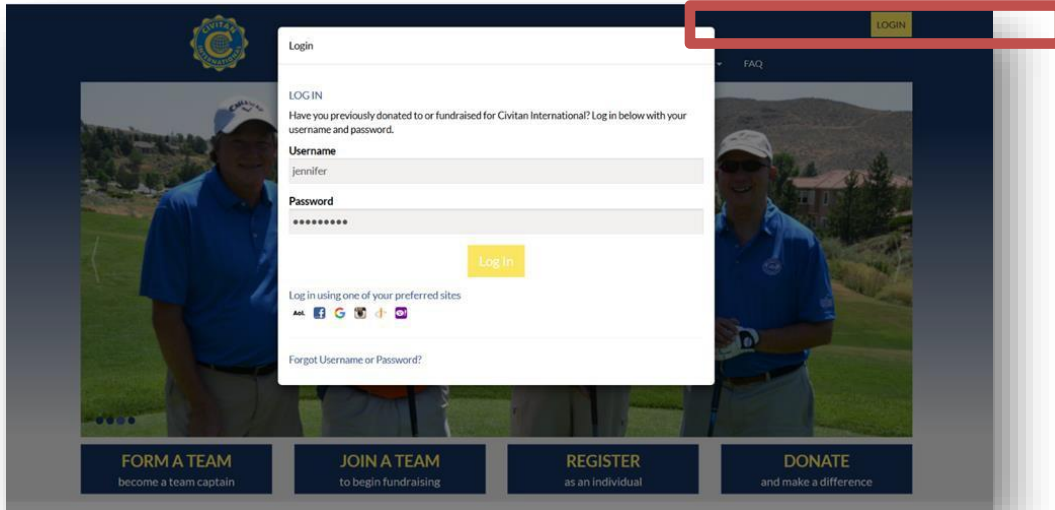
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STEP 2- Login to your Participant Center

STEP 3- On your Participant Center home page and click the "Email" tab to access the Email functionality.
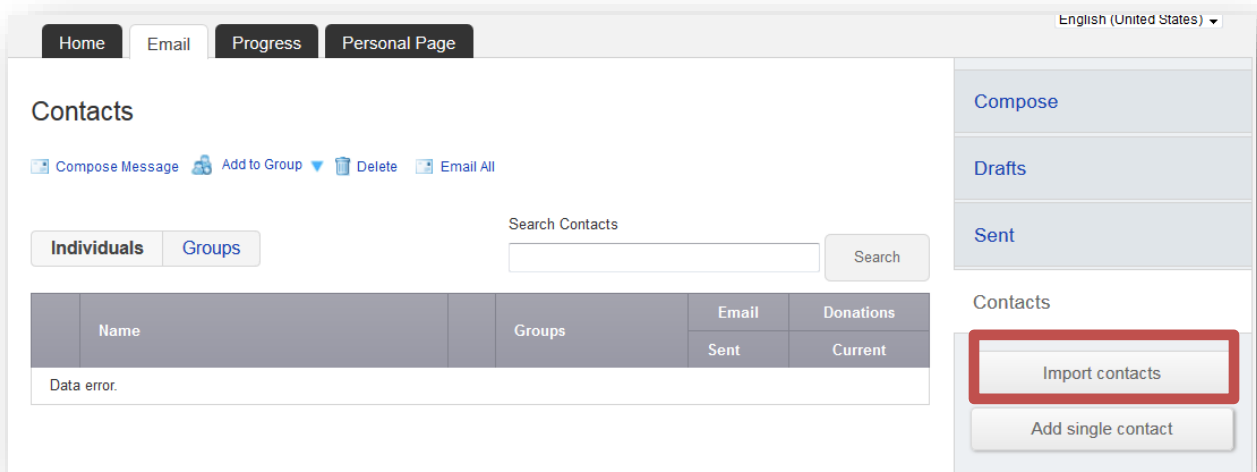

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STEP 4-Click "Contacts" in the links on the right-side of the screen.

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STEP 5- Click "Import Contacts"

STEP 6-Choose the button next to "File-based import for…"
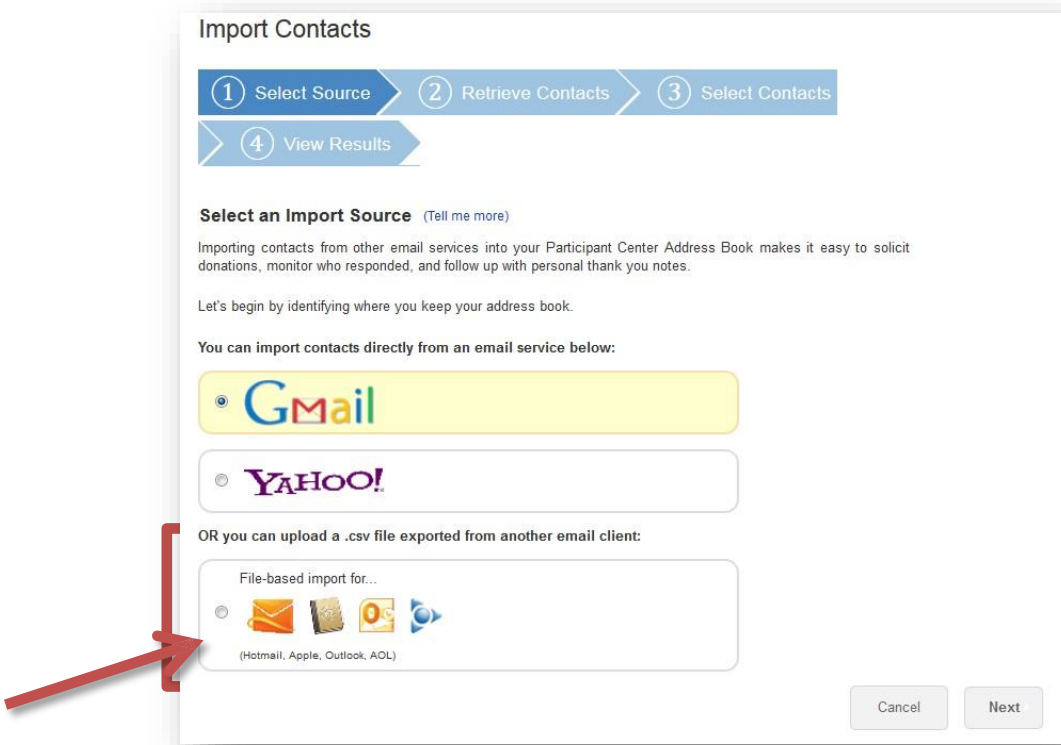
-CONTINUE ON NEXT PAGE-

Next, browse your computer to find your prepared CSV file

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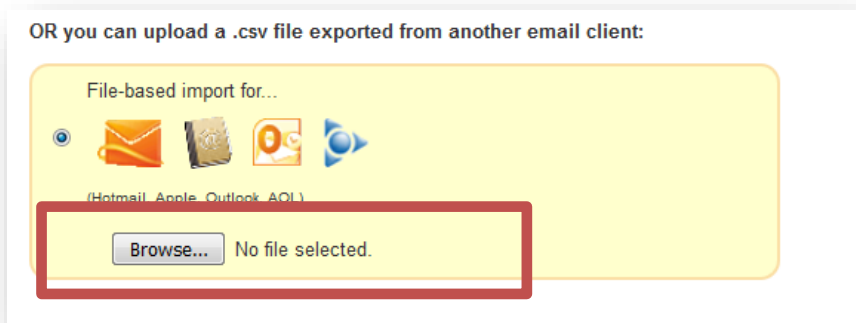
Once you select your file, you'll see the file name on the screen.
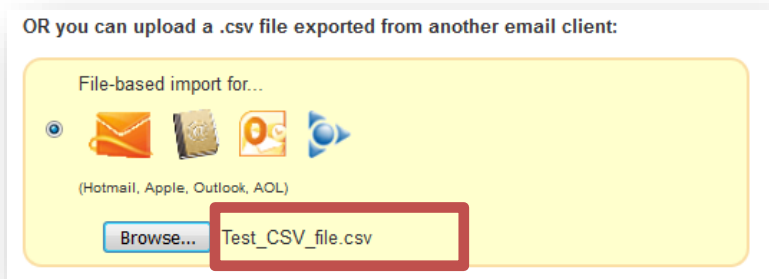
STEP 7- Click "Next" to continue

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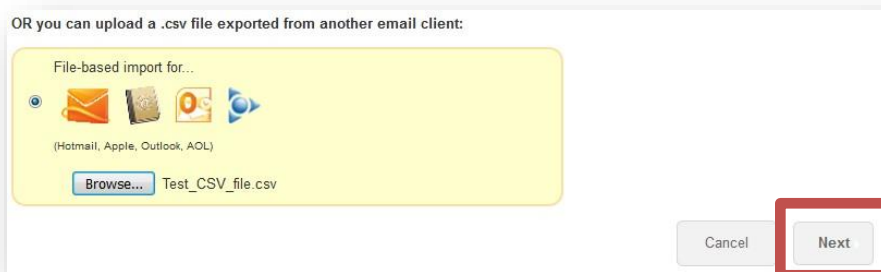
Step 8- Preview the contacts from your file and ensure they are mapped to the correct fields (i.e. first name, last name, email address). If you are satisfied with the results, click NEXT. If you need to adjust the mapping, click "change the column mapping" to fix.

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STEP 9- Select Contacts to Import

In most cases you'll want to import all of the contacts that are in your uploaded file. To do so, select the first radio button that says "Import all # contacts into your Participant Center Address Book."

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Or…if you only want to select certain contacts to transfer over, check the "Select box" next to the individuals that you do want in your Participant Center contacts.

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STEP 10-SUCCESS! You will see a yellow text box showing how many of your contacts were successfully imported to your address book. Then, click "Finished" on the bottom of the page. You're ready to start sending some emails!

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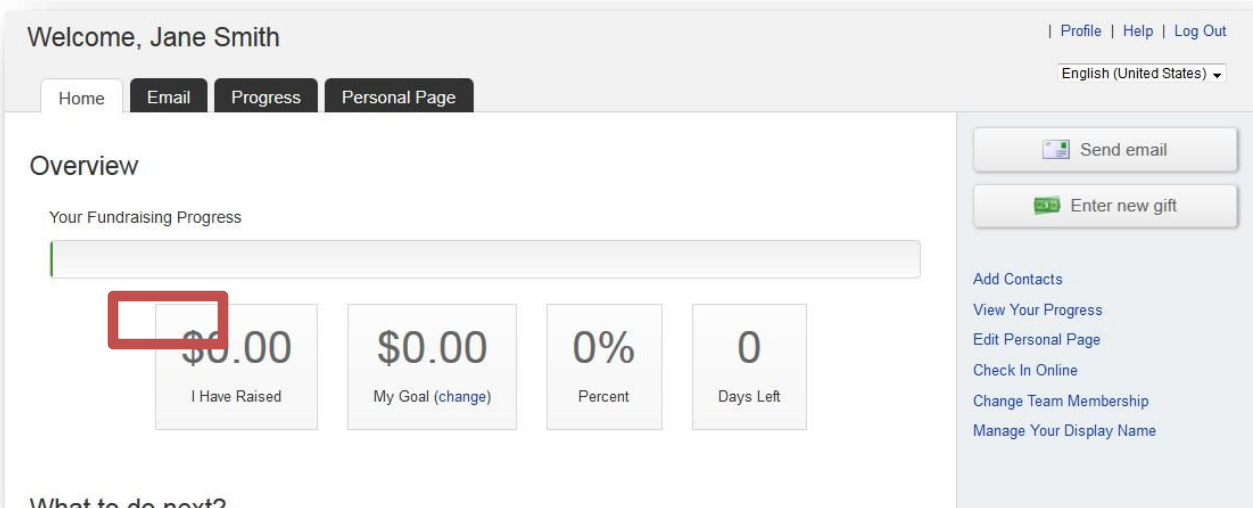P a r t i c i p a n t C e n t e r G u i d e
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How to Upload Contacts from Gmail or Yahoo

NOTE: If you use Hotmail, Outlook or another email provider, please refer to the guide above for uploading

***contacts with a CSV file.***

STEP 1- Login to your Participant Center
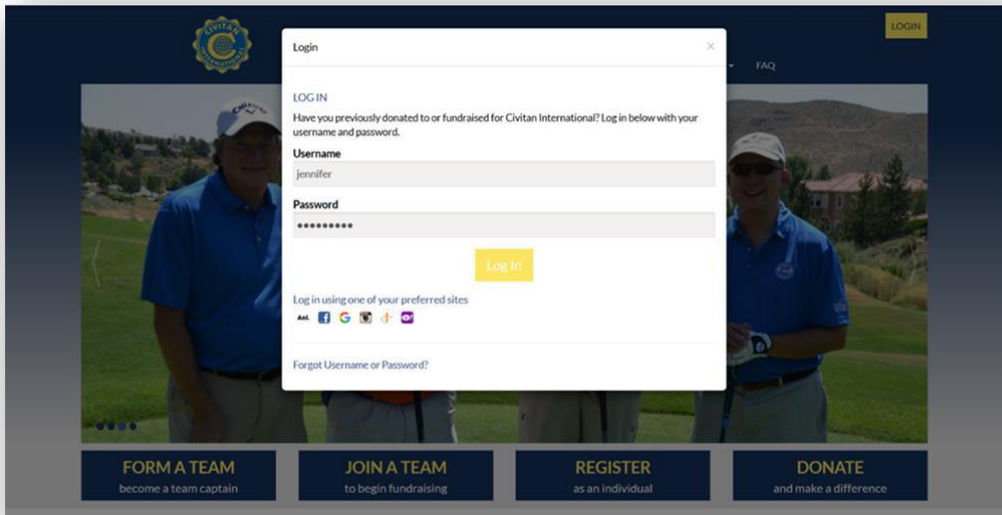
STEP 2- On your Participant Center home page and click the "Email" tab to access the Email functionality.
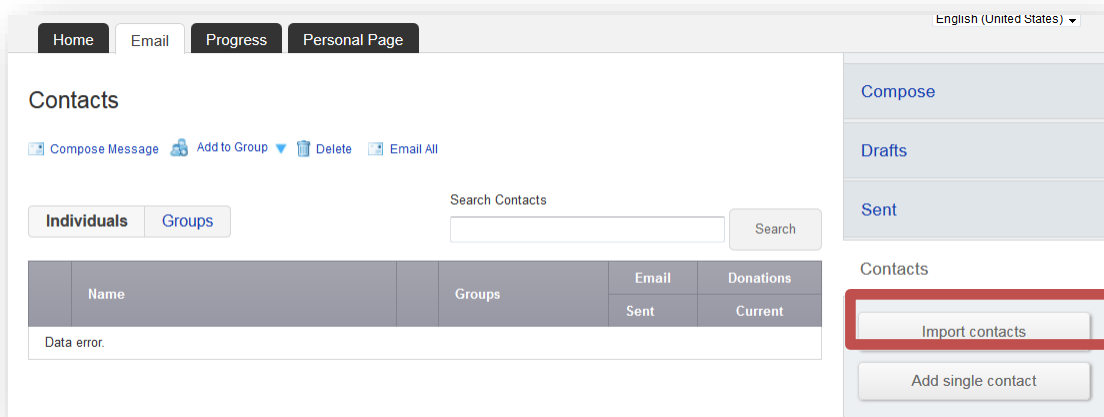
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STEP 3-Click "Contacts" in the links on the right-side of the screen.
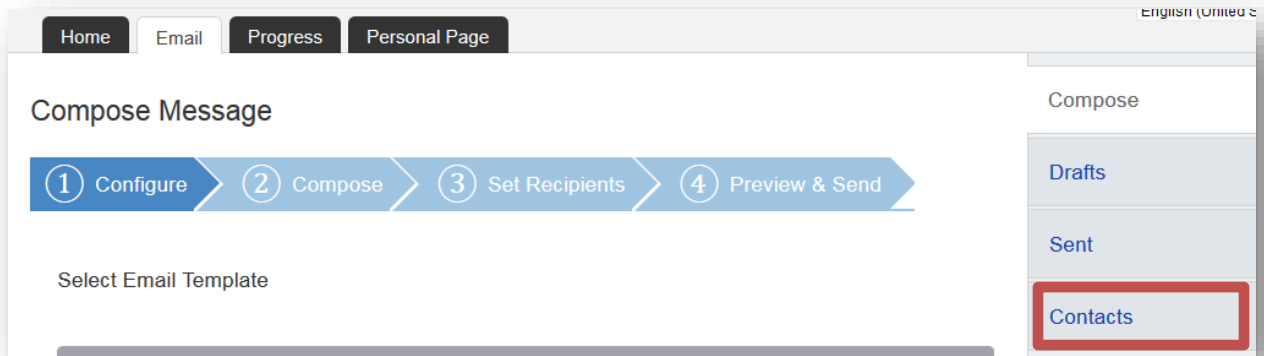
STEP 4- Click "Import Contacts"

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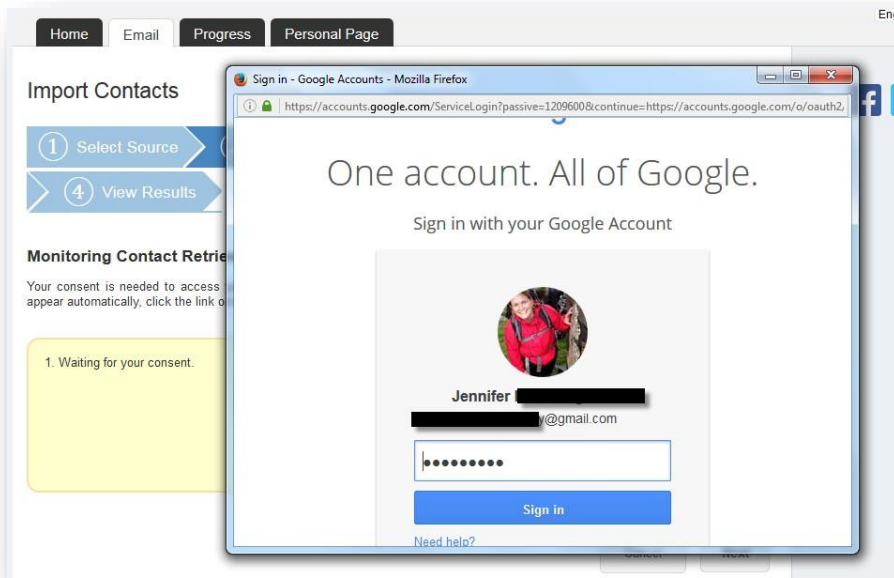P a g e | **22**

STEP 5-Choose the button next to either Gmail or Yahoo and click "Next"
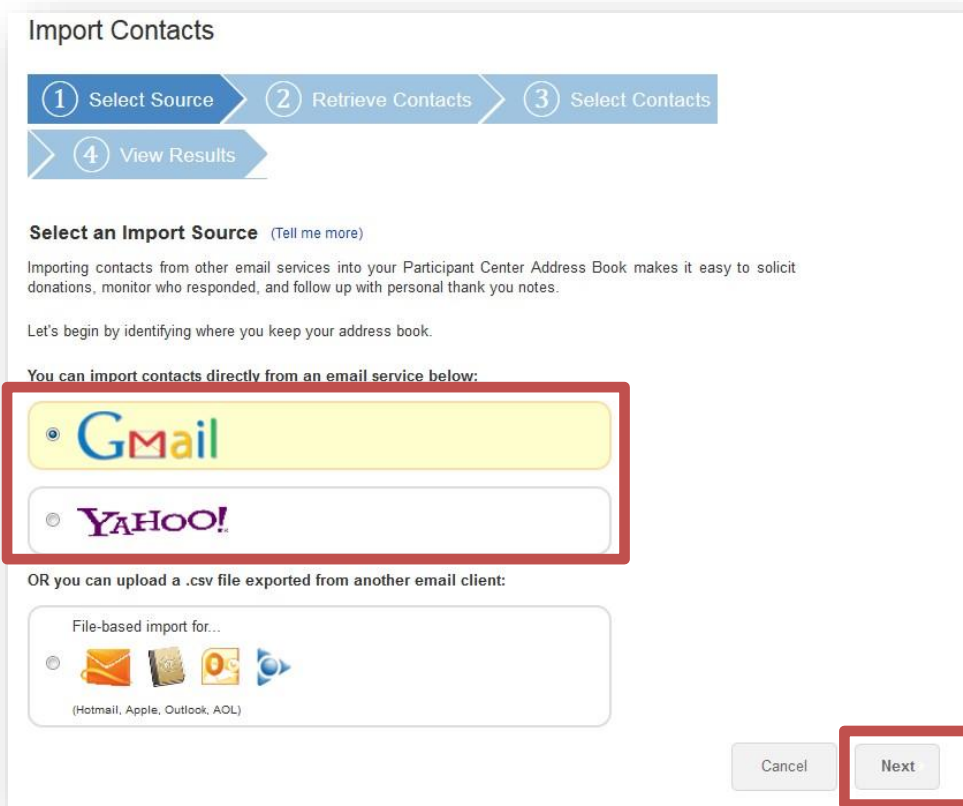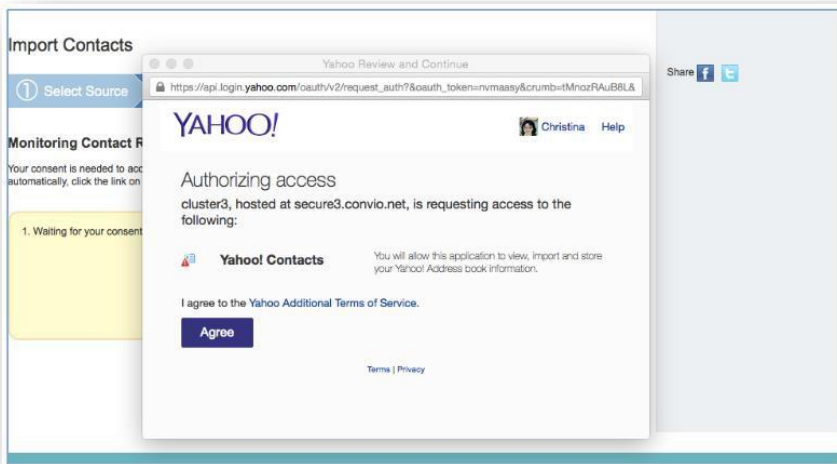

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STEP 5-Login to your Yahoo or Gmail email account to link to the Participant Center

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Yahoo or Google may request for you to authorize access. Click "Allow access" so that you confirm permission for your Participant Center to access your email contacts:

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STEP 7- Select Contacts to Import
You can opt to import ALL of your contacts from your email address book.

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We recommend you review your contacts so you can select the email addresses that are current.

Click the check box next to the email addresses of the contacts you want to import into your Participant Center. Then, click the "Next" button.

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STEP 8- Confirm and complete a final review of the contacts that will be imported. Review your imported email addresses:

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If you have any duplicates to resolve, be sure to review.

Add- add to your import for your Participant Center Contacts

Update- Modify a current contact you have in your Participant Center Contacts

Ignore- Do not add this contact to your Participant Center Contacts

STEP 9- After you click "Finished" on the bottom of the page, you're ready to start sending some emails.

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How to Send an Email

STEP 1- Login to your Participant Center

STEP 2- On your Participant Center home page and click "Email" tab to access the Email functionality.
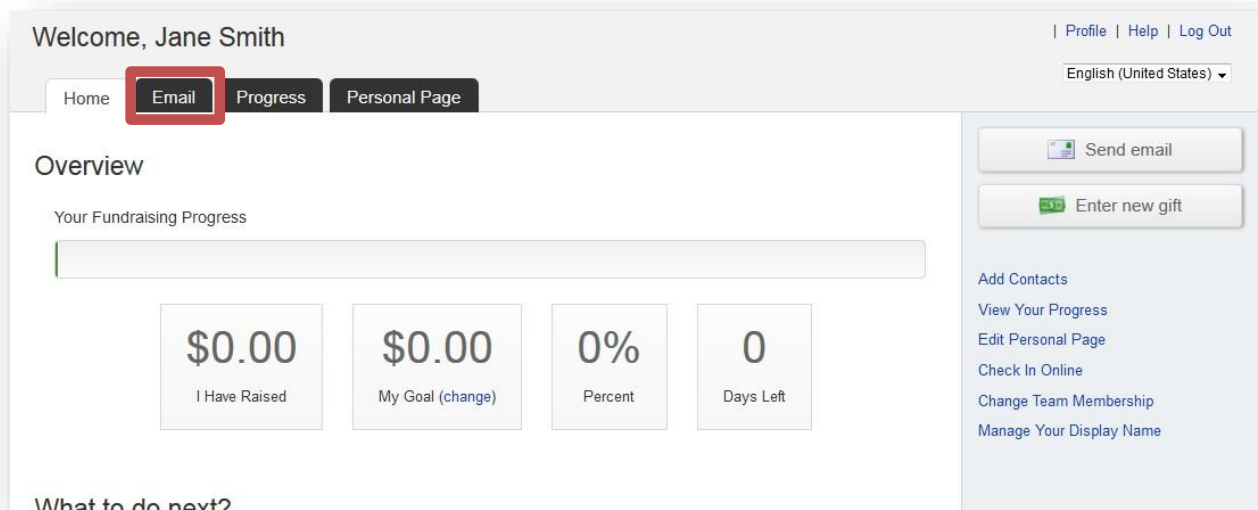
STEP 3-Select an email message template.
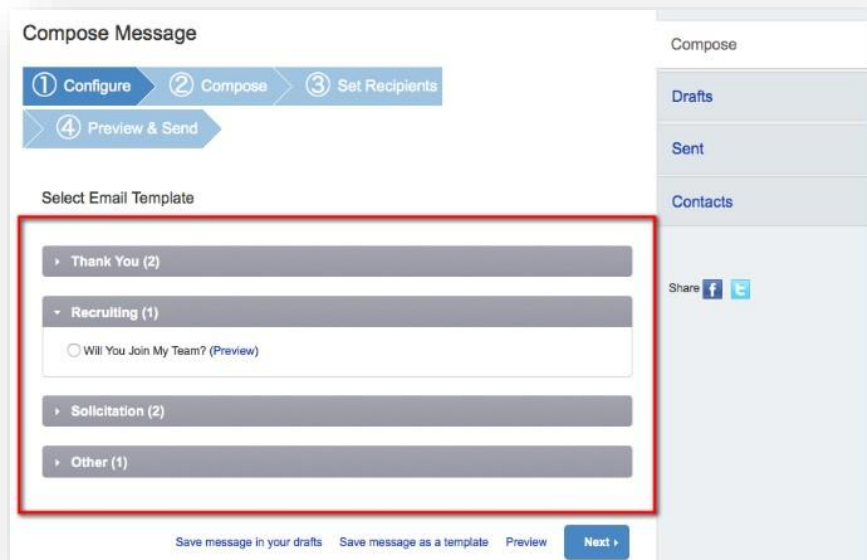
STEP 4- Compose your message

You can edit the SUBJECT line and the text in the BODY of the page. In our templates, you can just enter

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your personalized information before you're ready to send. Otherwise, feel free to start from scratch and change all of the message to meet your specific needs.

If you are sending this message in bulk to all of your contacts or a specific group, click the "Include personalized greeting". This includes a default salutation and the first name of each recipient listed in the To line of an email message (for example, Dear Pat). If the recipient is not already a contact within your address book, the word "Friend" will display with the salutation instead. **Note:** *If you select to include the personalized greeting in your message, do not manually type in a greeting as well. (That is, you do not want the message to start with two lines that say "Dear Sue" or a "Dear Sue" line followed immediately by a "Hey Sue" line.)*

Be sure to put your name in the closing. You don't have to worry about pasting the URL to your fundraising page as that populates automatically upon sending the email. Click **NEXT**.
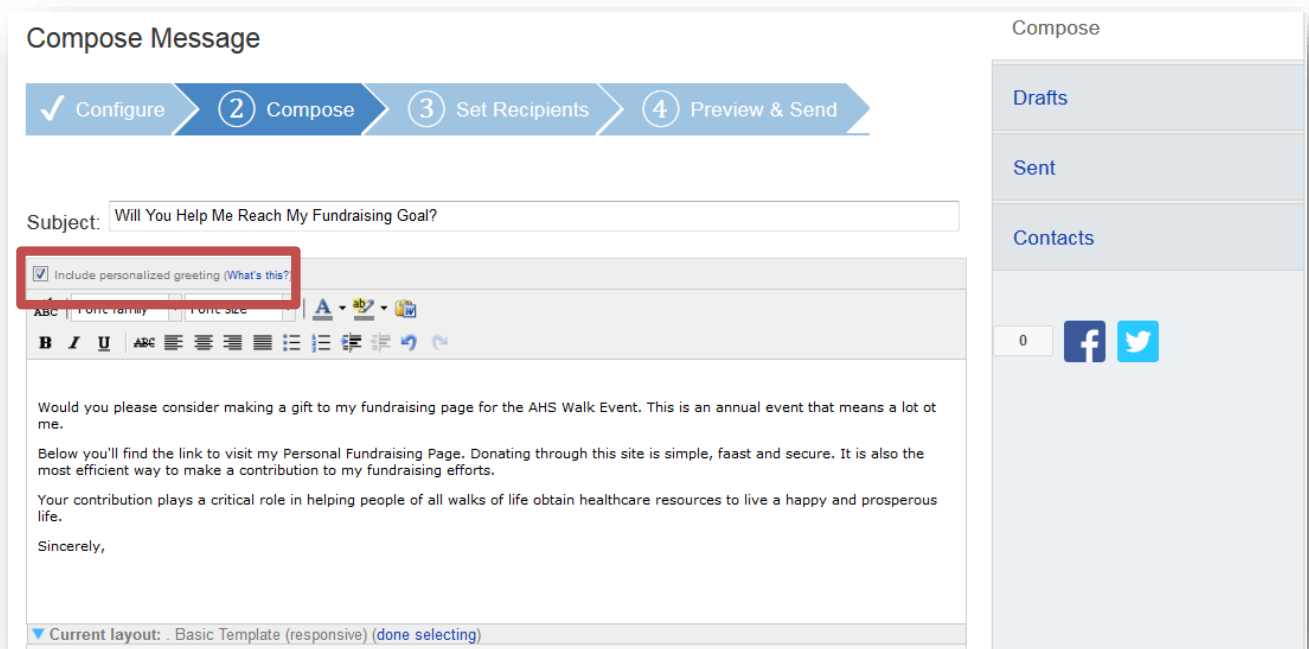
Remember to SAVE your message often to prevent losing your work in case your session times out from inactivity. (Click "Save Message In Your Drafts" to save your work, see below for "How to access your saved drafts.")
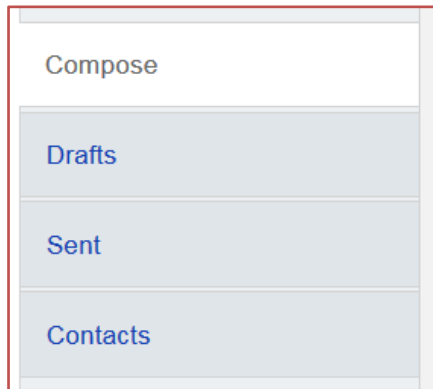
-CONTINUE ON NEXT PAGE-

Click **NEXT** if you are ready to **SEND** your email message and select recipients.
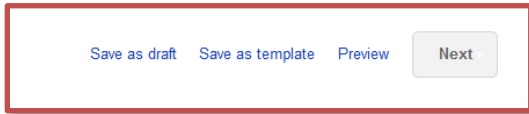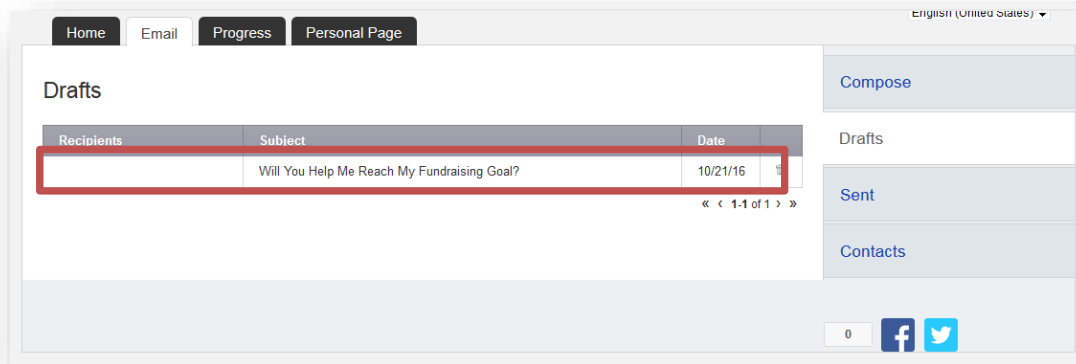

How to Access Your Saved Drafts

When you return to your Participant Center, click on the "Send an Email" tab and click **DRAFTS** to review your saved messages in draft status.

All of your **SAVED DRAFTS** will appear in a list by the date they are created. Click on the **SUBJECT** to continue editing and finishing sending a message.

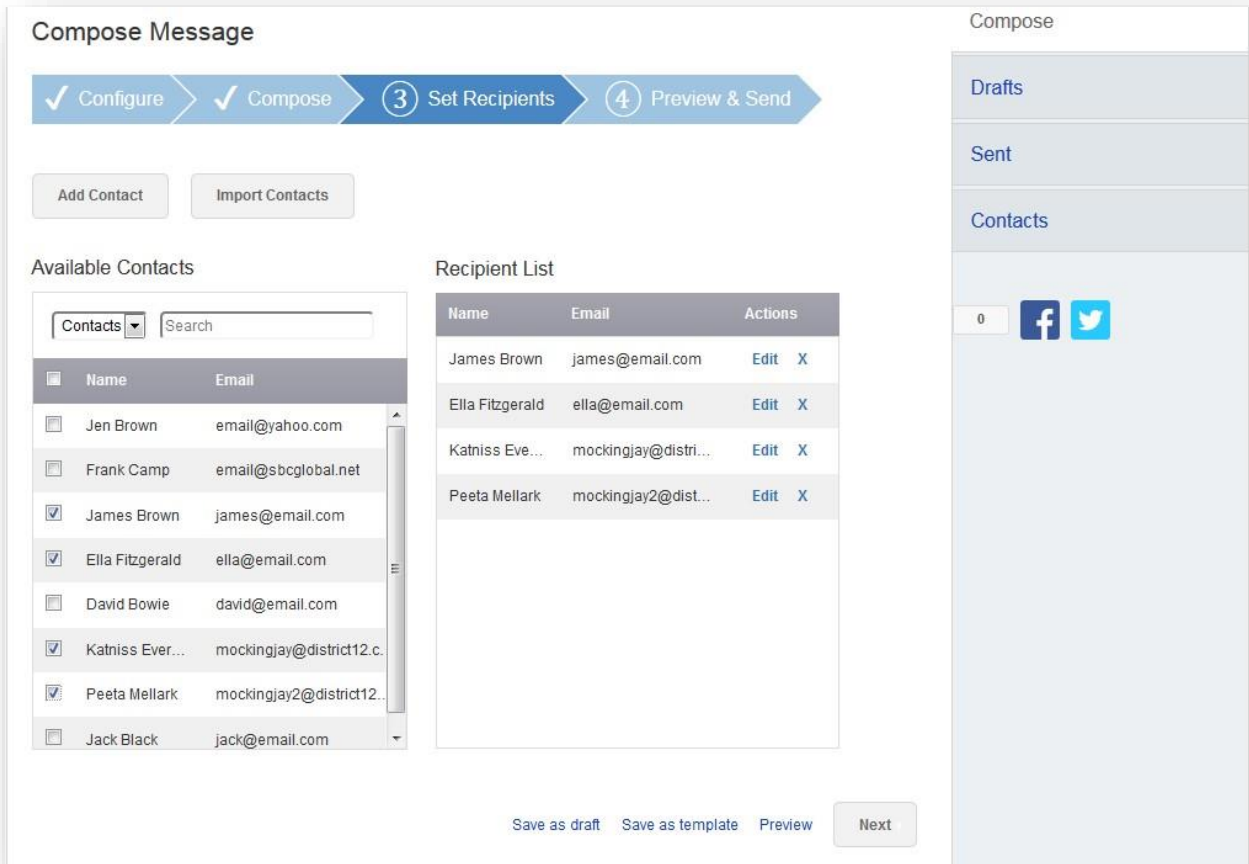## STEP 5- Select Recipients

Your available contacts will be available to select. If you want to add more contacts, you can import them from your Gmail or Yahoo accounts, or from a file upload for all other email service providers. (See our additional guide to complete this step, if needed)

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Otherwise, check the box next to the names of the recipients that you would like to receive your email message, and their names will show up in the **RECIPIENT LIST** on the right.


Then, click the "Next" button.

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STEP 6- Final Preview

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You have a final opportunity to preview your message as it will appear to your email recipients. If you would like to make changes, click back on the **COMPOSE** step to make edits. Otherwise, click **SEND** at the bottom of the page to complete the email process and send your message.
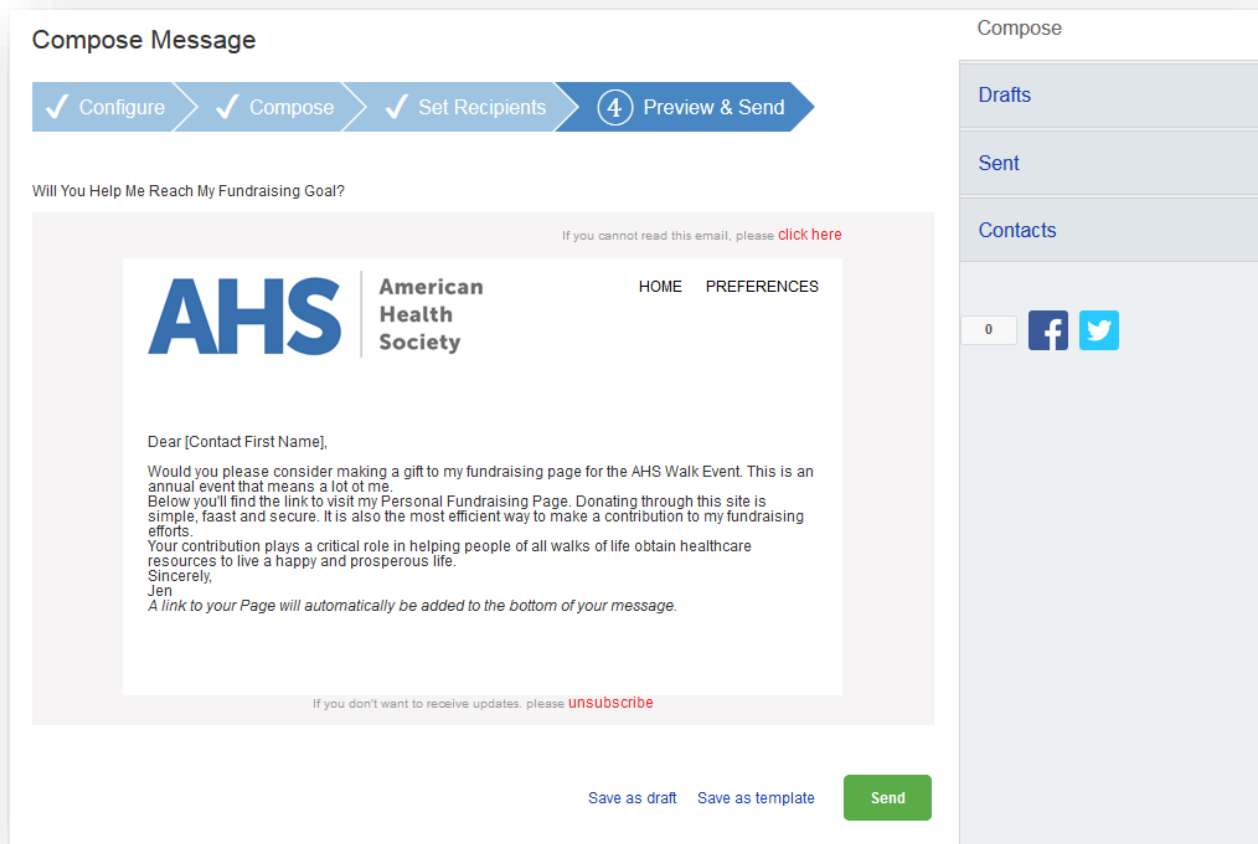
If your message is one that you'd like to send frequently, you may want to create a **TEMPLATE**. A template provides you a starting point for your message so you don't have to compose the entire message from scratch when you return to send another message.
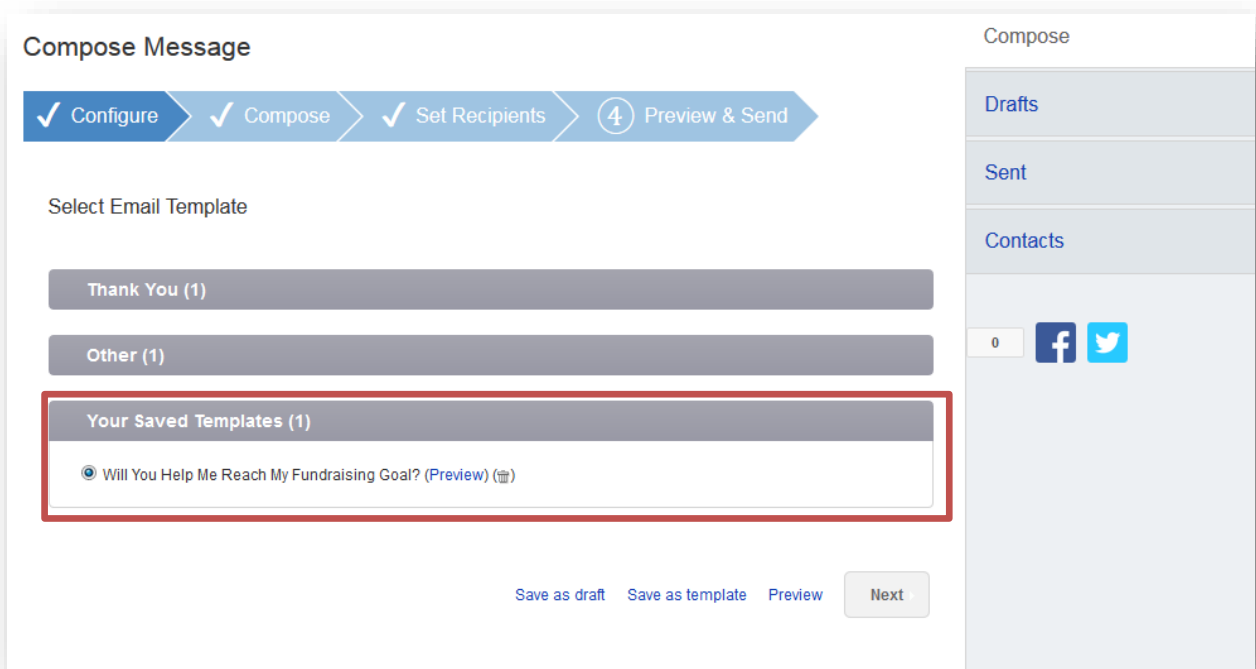
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To create a **TEMPLATE**, click "Save message as a template" **BEFORE** you hit the SEND button.

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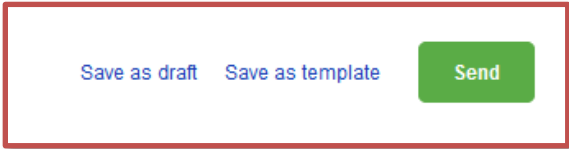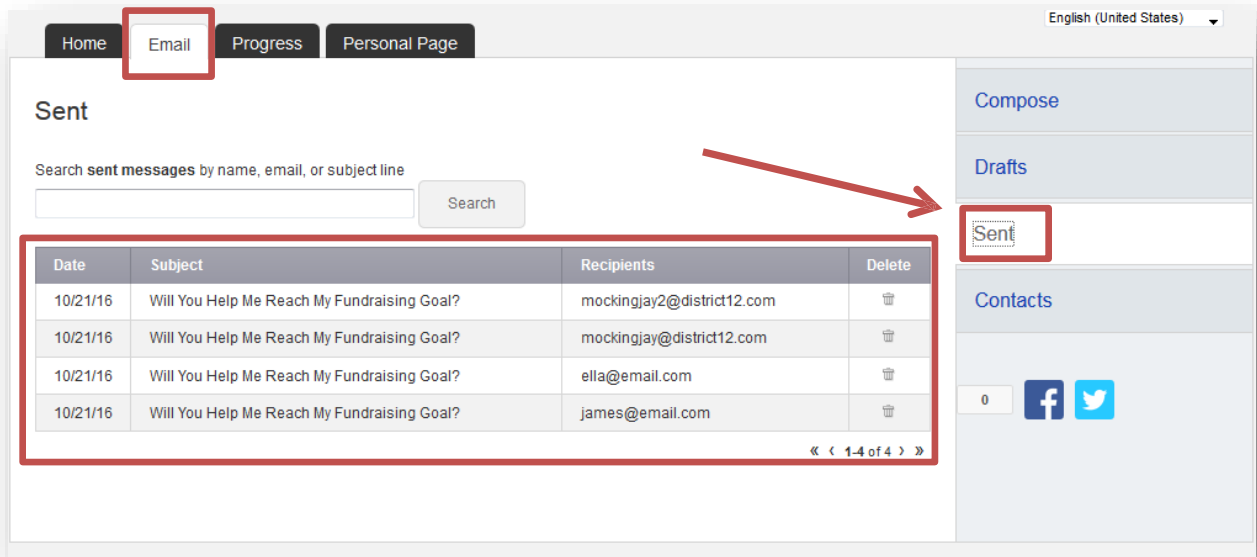
Accessing your saved templates

To access your SAVED TEMPLATES, click on SEND AN EMAIL. You will now see a section for YOUR SAVED EMAIL TEMPLATES. Select the appropriate template and complete the email creation steps as outlined above.

-CONTINUE ON NEXT PAGE-

STEP 7- View Sent Messages

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P a g e | **33**

Keep track of your sent email messages at any time. Just click the **EMAIL** tab and then the **SENT** tab on the right side of the page. All of your sent messages, along with recipients, and the date, will appear in a list.


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How to Edit Your Unique Web Address

NOTE: Your Participant Center is the online portal where you can check your fundraising progress, send email solicitations and thank you's, update your Personal Fundraising Web Page and more!

What is the Unique Web Address?
Once you've created your personal fundraising page, you have your very own URL address to get there. By default this can look quite lengthy, but there is a feature inside your Participant Center allows you personalize this URL which makes it easier to share with supporters. Paste the URL inside emails, on your Facebook and Twitter pages, or create business cards with this friendly URL to give supporters
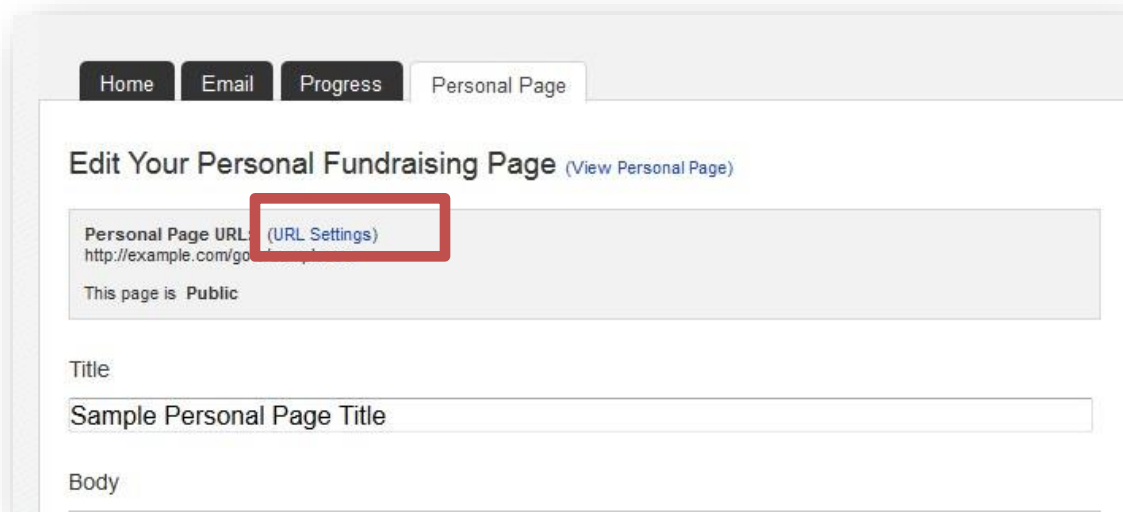
Step-1 Log into your Participant Center

Step 2-Click "Personal Page"

B r e a k t h r u G o l f Benefit
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P a g e | **35**
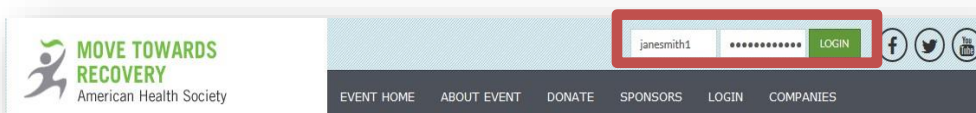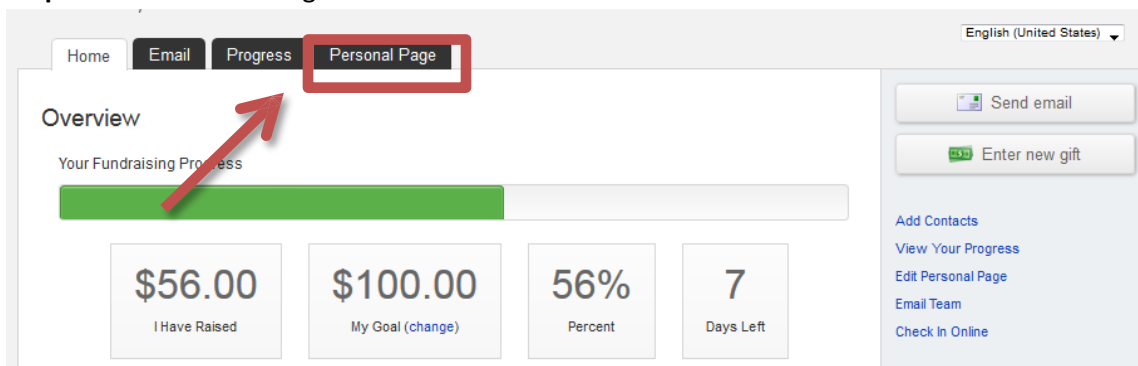
STEP 3- Click "URL Settings" in the red outlined box
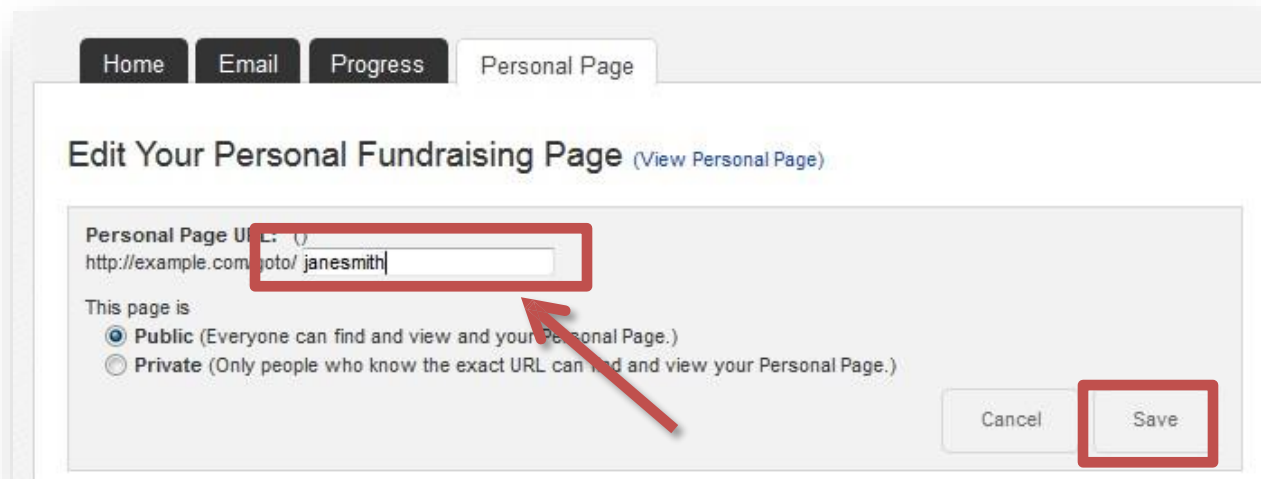
STEP 3-Insert your desired address in the text box (your name, nickname) and click "Save" to confirm changes.

-CONTINUE ON NEXT PAGE-

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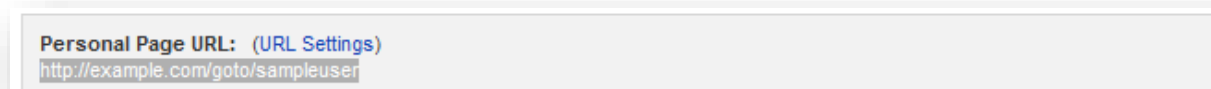P a r t i c i p a n t C e n t e r G u i d e
P a g e | **36**

STEP 4- A green confirmation message will appear on the page if your change was successful.
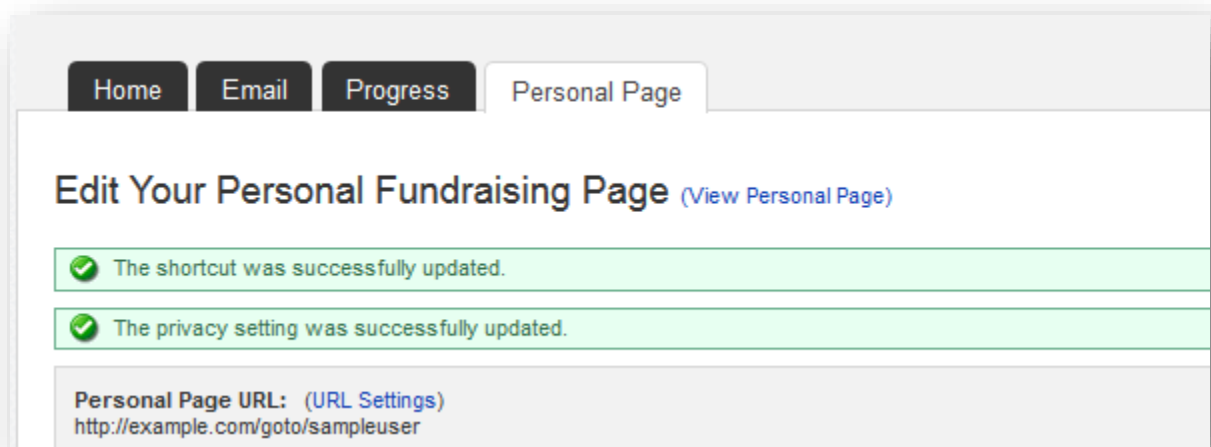
NOTE: You may receive an error if your custom URL is already taken, so try a different word, phrase to create your address. Also avoid using spaces or special characters (e.g. %&^$, etc.)

STEP 5-Copy and paste your new custom link to share with friends and family in your email messages or on social networks

STEP 6- If you are a team captain, repeat these same steps but on the "Edit Your Team Page" tab so that you can customize your Team Fundraising Page's website address.

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P a g e | **37**

How to Set Up Your FB Fundraising Page

Step 1- Log into the Participant Center.

Step2. Click the "Fundraise on Facebook" blue button on the far right bottom of your participant center page.

Step 3. Click Create Fundraiser.

Step 4. The Facebook login page opens to enter the login information. The participant enters the login information, and the new Facebook Fundraiser is created.

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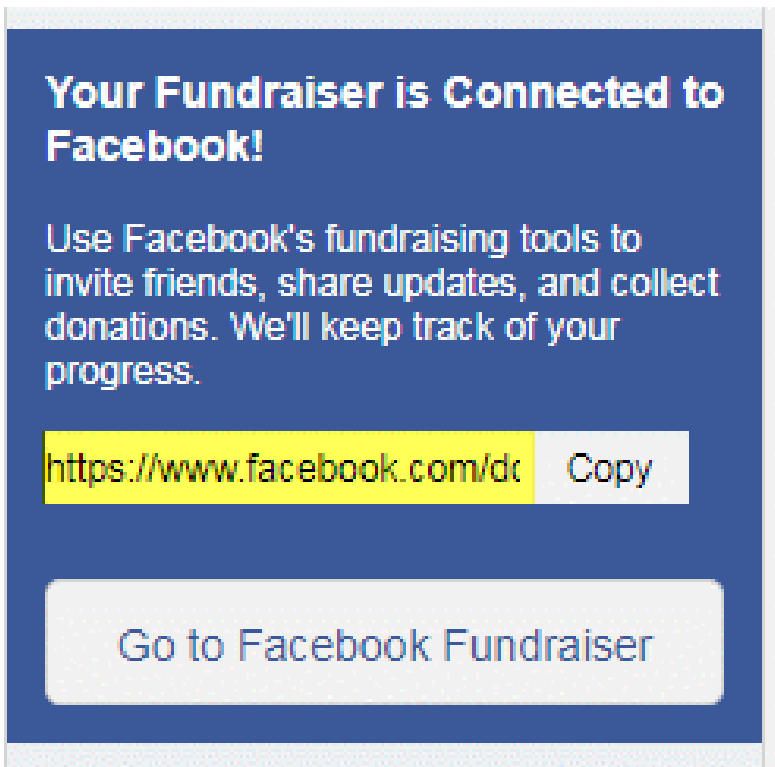
Step 5. The Participant Center now contains a link to the newly created Facebook Fundraiser. The title and story for the Facebook Fundraiser are automatically populated with the Personal Page information.

The participant can copy/paste the Facebook Fundraiser link in an email to send out to their friends and family to ask for donations.

Or, click **Go to Facebook Fundraiser** to open the fundraiser in Facebook in a separate tab.

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