ACTIVE AND COMMUNITY EVENTS
EVENT MANAGEMENT GUIDE

Welcome to the Comprehensive Event Website Management Guide.
This Guide is broken out into two main parts:
1. Participant Experience (signing up and using the dashboard)
2. Event Manager Experience (working within the different functions of the EMC).

While some images may reflect Relay For Life or Making Strides, the functionality is the same for Active and Community Events.

Last Updated: December 2018

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Participant Experience

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If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Chapter 1: Society Account

- Creating a New Society Account
- Logging in to Your Existing Society Account
- Managing your Society Account

Creating a New Society Account
(For first-time American Cancer Society online event participants)

If you have never participated in an American Cancer Society event online (Relay For Life, Making Strides Against Breast Cancer, Bark For Life, Active and Community, DetermiNation, etc.) you can create a brand new Society Account which you can use for any future ACS online activity!

1. Visit your event website.
2. Click on the Sign In link in the upper right-hand corner.
3. Click the blue **Create an Account** button.

![Login](image1.png)

4. You can choose to create your new account using our social login feature OR using your email address.
   a. **Note:** If you choose to create an account with your email address, it must be a unique email address, not used by another other ACS online event participant. Enter the required information, and click **Create an Account**.
   b. If your participants need additional assistance creating their new Society Account, please have them call our Income Support department at 877-957-7848. We're always ready to assist with any participant question they might have. If staff need support, please submit a ticket at helpme.cancer.org or chat in via helpme.cancer.org.

![Create Account](image2.png)
Logging in to Your Existing Society Account
(For returning American Cancer Society online event participants)

If you have previously participated in an American Cancer Society event online (Relay For Life, Making Strides Against Breast Cancer, Bark For Life, DetermiNation, etc.) you can login using the most recent email address with which you registered.

1. Visit your event website.

2. Click on the **Sign In** link in the upper right-hand corner.

3. Use one of the Log In options to access your account.
   a. If your participants need additional assistance creating their new Society Account, please have them call our Income Support department at 877-957-7848. We’re always ready to assist with any participant question they might have. If staff need support, please submit a ticket at helpme.cancer.org or chat in via helpme.cancer.org.
Manage Your Society Account

1. Log into your **Society Account**

2. Click on the **My Account** link.

Update Your Basic Information

1. Click the blue **Edit** link to make changes to your biographical and contact information. Click **Update** to save your changes.

Update Your Login Preferences

1. Scroll down to the **Login Preferences** section.

2. Click the appropriate blue links to make changes to your login email and/or password. Make sure you always click **Save / Update** once you’ve made the desired changes.
a. **Note:** If you want to simultaneously update your contact email, so you also receive emails at your new email address, check the box before saving.

3. You can also choose to link your Society Account to your Facebook or Google, which will allow for easier login in the future.

**Update your Email Preferences**

1. Scroll down to the **My Contact Preferences** section.

2. Click the blue **Edit** link to make changes to your contact preferences. Click **Update** to save your changes.
   a. You can change your contact email address
   b. Opt in/out of receiving emails
   c. Select HTML or Plain Text as your preferred email format. HTML is recommended, as that allows you to get the full experience from each email, with photos and links.
Chapter 2: Sign Up

- Start a New Team
- Join a Team
- Register as an Individual - not part of a Team

Start a New Online Team

1. Visit your event website.
2. Click on the Sign Up link.
3. You will be asked to create / log in to your Society Account (see previous section for more info on Society Account)
4. Once you have logged into the website, click Start a Team.
5. Enter information about the team you are creating before clicking Next:
   - Name your team
   - Select if your team is affiliated with a company or organization

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
6. Select your participation type

7. If you would like to make a donation to kick start your fundraising, select a gift value or enter a different amount. If you would prefer not to make a donation during your registration, select **Not right now**

8. Complete the **Registration Form** with your personal information.

   *If you are a returning participant, this information should be completed for you. Please be sure to check that all fields are updated for the current year.*

9. If your registration includes a fee, or if you chose to make an additional donation, you will be asked for billing information.

10. Once finished, click **Complete**.

11. **Your registration is complete.** Welcome to your dashboard!

---

**THANK YOU FOR JOINING**

**Welcome to your fundraising dashboard.**

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**Join an Online Team**

1. Visit your event website.

2. Click on the **Sign Up** button.

3. You will be asked to create / log in to your Society Account (see previous section for more info on Society Account)

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*If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.*
4. Once you have logged into the website, click the **Join a Team** link.

5. To find the team you wish to join, start typing the team name. All the teams that have registered on the website will appear in a list. Select the team you wish to join. Then click Next.

6. Select your participation type

7. If you would like to make a donation to kick start your fundraising, select a gift value or enter a different amount. If you would prefer not to make a donation during your registration, select **Not right now**

8. Complete the **Registration Form** with your personal information.

   *If you are a returning participant, this information should be completed for you. Please be sure to check that all fields are updated for the current year.*

9. If you chose to make an additional donation, you will be asked for billing information.

10. Once finished, click **Complete**.

11. **Your registration is complete.** Welcome to your dashboard!

Register as an Individual

Please use the following instructions to help you register online as an individual not part of a team. *If you are a team captain or team member, please use the instructions to start or join a team to guide your online registration.*

1. Visit your event website.

2. Click on the **Sign Up** link.

*If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.*
3. You will be asked to create/log in to your Society Account (see previous section for more info on Society Account).

4. Once you have logged into the website, select the Participate As An Individual option.

12. If you would like to make a donation to kick start your fundraising, select a gift value or enter a different amount. If you would prefer not to make a donation during your registration, select Not right now.

13. Complete the Registration Form with your personal information.

   If you are a returning participant, this information should be completed for you. Please be sure to check that all fields are updated for the current year.

14. If your registration includes a fee, or if you chose to make an additional donation, you will be asked for billing information.

15. Once finished, click Complete.

16. Your registration is complete. Welcome to your dashboard!

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Chapter 3: Quick Start Guide

- Access Your Quick Start Guide
- Commit to your Fundraising Minimum
- Complete Your Profile
- Personalize Your Page
- Update Your Goal
- Make a Donation

Access Your Quick Start Guide

1. Log into your Dashboard.

2. If the Quick Start Guide is not displaying, click Show Quickstart Checklist in the upper right-hand corner.

3. Complete each of the steps in the Quick Start Guide to get your personal fundraising page ready for success.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Commit to Fundraise

This section will only appear if your event requires you to reach a fundraising minimum to participate. If you have already reached your fundraising minimum, you do not need to recommit.

Fundraising minimums are most common on DetermiNation events and will not appear on the majority of events.

1. If you have not reached your fundraising minimum, click on the ‘Recommit Now’ button, and complete the form. You will be asked for your credit card information and charged $1.

2. If you do not meet your fundraising minimum by the deadline, your credit card will be charged the remaining balance.

Complete Your Profile

3. From the Quick Start Checklist, click “Complete Your Profile”

4. Tell us more about yourself! Answer only the questions you want.

5. Click Save Changes once finished.
Personalize Your Page

1. From the Quick Start Checklist, click “Personalize Page”
2. Add personal photos and/or a video.
3. Click **Save Changes** once finished

Update Your Goal

1. From the Quick Start Checklist, click “Update Your Goal”
2. Enter your new goal.
3. Click **Save Changes** once finished

Make a Donation

1. From the Quick Start Checklist, click “Make a Donation.”
2. Click the ‘Donate to my Goal’ button
3. You will be taken to the donation form to complete the personal donation process.

*If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.*
Chapter 4: Participant Dashboard

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Chapter 5: Team Leader Dashboard

Invite your friends and family to join your team, email team members, or promote your team using one of our pre-written messages, Facebook or Twitter.

Make a personal donation towards your team goal!

Add Photos & Video to Team Page

Update your team story and share why you support the American Cancer Society!

Edit your team name

View/Edit Team Page

Update team fundraising goal

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.

View and thank your team donors, and download a donor list.

View and email your team members, and download a team roster.

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### TEAM DONATIONS

<table>
<thead>
<tr>
<th>Name</th>
<th>Amount</th>
<th>Date Received</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Celia Madden</td>
<td>$50</td>
<td>12.3.2018</td>
<td></td>
</tr>
</tbody>
</table>

### TEAM COMMUNICATIONS

<table>
<thead>
<tr>
<th>Team Members</th>
<th>Past Members</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Amount Raised</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elizabeth &quot;Mad Dog&quot; Madden</td>
<td>$480</td>
<td>EMAIL</td>
</tr>
</tbody>
</table>
Chapter 6: Manage Your Personal/Team Page

- Edit Your Personal/Team Page
  - Add Photos and Video
    - Edit Your Story
  - Update Your Personal/Team Goal

Edit Your Personal/Team Page

1. Log into your personal or team Dashboard
2. Scroll down to the Profile section of the dashboard.
3. Your profile management tools will appear

Add Photos and Video

1. Add Photo(s)
   a. **Personal Photo** – Insert up to two images to display on your personal page by uploading a file that contains a digital photograph. You may upload photos up to 4MB.
   b. **Team Photo** – Insert one image to display on your personal page by uploading a file that contains a digital photograph. You may upload photos up to 4MB.
      i. **Browse** – Click the background to find a photo located on your computer and upload to your personal page.
      ii. **Caption** – Enter a caption for the photo(s) you uploaded to your personal page.
      iii. **Save Changes** – Click to see your new image(s) reflected on the personal page.

2. Add Video (personal page only) – Insert a video to display on your personal page by uploading a URL link that contains the video clip.
   a. Enter the URL to a video to see the clip embedded on your personal page and
   b. Click Save Changes to see your new video reflected on the personal page.

Edit Your Story

1. Use the text editing tools to edit your story and share why you/your team participate in this event.
2. Click Save to make your changes appear

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Update Your Personal/Team Goal

1. Log into your personal or team Dashboard
2. Scroll down to the Profile section of the dashboard.
3. You can update the goal amount to reflect your personal/team fundraising goal.
4. Click Save Changes once finished.

Chapter 7: Emailing From Your Dashboard

- Compose a New Message
- Thank Your Donors

Compose a New Message

1. Log into your Dashboard.
2. Select whether you want to ask for donations, share your page, or invite friends, then select the Email icon.
3. The email tool will open below:
   a. Begin typing the names of those you wish to email into the To: field. If email addresses are already in the Address Book, they will begin to auto-populate.
   b. Click to Select Contact(s) or Select Group(s) if you would like to see more options of individuals you may send the message to.

4. If you need help deciding what to write in your email, choose one of the template messages.
   a. Click on the Select a template drop down menu to see the suggested messages available (i.e. Thank a Donor)
   b. Once you select the template of your choice, the email will appear for you to personalize or send as is.

5. Once your email appears the way you wish, there are a few options available:
   a. Save As New Template if this is a message you plan to send multiple times
   b. Save As Draft if you want to send the email at a later time
   c. Preview to see what the email will look like to recipients
   d. Send to deliver this message to everyone you have added as a recipient of this email. A confirmation will appear letting you know the message has been sent and giving you an opportunity to continue sending emails.
Thank Your Donors

1. Log into your Dashboard.
2. Scroll down to My Communications to see a complete list of your donors.
3. You can choose to thank your donors all at once by clicking Thank All or thank them individually by selecting Thank next to the appropriate donor’s name(s).
4. Select the desired template or create your own and Send!
5. Once a Thank You message is sent, the “Thank” prompt will disappear from the donor’s name.

Chapter 8: Manage Your Contacts

- Manage Your Address Book
- Import Contacts
- Create an Email Group

Note: The contact information in your address book is strictly for your use. Neither the American Cancer Society nor web system will send unsolicited email (spam) to your contacts in your address book, or sell the information to a third party.

Manage Your Address Book
3. Log into your **Dashboard**.

4. Scroll down to **My Communications** section of the dashboard, and click **Manage Contacts**

5. Your address book will appear and contain any contacts you added, or previously emailed.
   a. If you registered as a returning participant, all contacts that you previously added or emailed from your Dashboard will automatically be in your current Address Book.

6. Within your address book, you can:
   - Import contacts
   - Add new contacts
   - Delete selected contact records
   - Edit existing contacts
     - Add address/phone information
     - Update email address
     - Add to/remove from email groups

### Import Contacts

*Import contacts from your personal email account to add for your communication through the Dashboard.*

1. Log into your **Dashboard**.

2. Scroll down to **My Communications** section of the dashboard, and click **Manage Contacts**

3. Select the **Import Contacts** button.

4. Choose to **Import Gmail Contacts** or **Choose File** to upload contacts from another email client.

### Create an Email Group

*Creating groups for your email contacts is a great way to organize your contacts and communication through the Dashboard.*

5. Log into your **Dashboard**.

6. Scroll down to **My Communications** section of the dashboard, and click **Manage Contacts**

7. Select the contacts you want to add to a group, and click **Add to Group**

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If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
8. Add to an existing group, or create a new group, then click **Save**.

9. When finished, click **Save Changes**.

**Chapter 9: Donate Online**

**Make an Online Donation**

1. Visit your event website.

2. To make a donation to the event, click on the **Donate** button.

3. Skip to step 11 and complete the donation form.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
4. To make a donation to a participant, navigate directly to the participant’s personal page, or find that participant by going to the event website. Scroll down to Event Fundraising, and click ‘All Participants’.

5. Search for a participant and click donate beneath their name.

6. You will be taken to the donation form for that participant.

7. Skip to step 11 and complete the donation form.
8. To make a donation to a team, navigate directly to the team’s page, or find that team by going to the event website. Scroll down to Event Fundraising and click ‘All Teams’.

9. Search for a team and click donate beneath the name.

10. You will be taken to the donation form for that team.
11. Complete the donation form

**YOUR GIFT**
Select your gift amount or enter other amount.

**YOUR INFORMATION**
Enter your **Contact Information** – if you are logged in at the time of donation, your contact info will pull in automatically!

Enter your **Billing Information** and **credit card** details.

Click the **Donate button** to complete the transaction.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Chapter 1: Access the Event Management Center

Access the Event Management Center

1. Visit your event website
   a. **Existing Staff/Volunteers:** Your log in information will be the same as it was for 2017. **Note:** It will be the same for all events you manage
   b. **New Staff/Volunteers:** See Appendix A for EMC access instructions.

2. Click on the **Sign In** link in the upper right-hand corner.

3. Click the **Event Manager** link on the top right side of the page.

4. The Event Manager Center (EMC) will appear. The EMC is divided into five sections. Upcoming chapters will dive into each section.
5. On the left side are Related Actions associated within the particular tab you are working in.

Chapter 2: Event Center Customization

- **Edit Event Center**
  - **Edit Event Options**
  - **Edit Event Properties**
  - **Edit Event Coordinator Properties**
  - **Submit Event Changes**

**Edit Event Center**

For all tasks listed in the Event Center Customization section, your first click will always be the ‘Event Center’ tab in the top navigation bar, and you will work your way through each of the steps under the Event Center.

1. From the EMC, click **Event Center** and under Related Actions select **Edit Event Options**.

2. Work your way through the following ‘Event Center’ details making updates where necessary.
Edit Event Options

1. Edit Event Options
   a. **Different Event Fundraising Goal**: Enter the **publicly announced goal**, as this will populate the fundraising meter on the greeting page.
   b. Click ‘Next
   c. **New Team Notification**: The event email address was automatically added when the websites launched. Feel free to add additional staff or volunteer emails to receive the notification email when a new team signs up online.
      a. Click ‘Finish’

Edit Event Properties

1. Event Name: Verify the Event Name is correct. – Please also submit as an Event Change.
2. Schedule: Verify the Registration and Walk Start Time are correct. – Please also submit as an Event Change.
3. Date & Time: Verify the Event Date – Please also submit as an Event Change.
4. Sponsor Lines: **Sponsor lines 1-5 can be updated at any point throughout the year if your event decides to start a new social media feed.**
   a. Sponsor name (1): Leave Blank
   b. Sponsor name (2): Official American Cancer Society YouTube Channel. Please leave as is.
   c. Sponsor name (3): Twitter feed. This is defaulted to the national Twitter page. If your event has a Twitter feed, please enter the web address of your twitter feed. Must remain in “https://twitter.com/...” format.
   d. Sponsor name (4): Facebook feed. This is defaulted to the national Facebook page. If your event has a page on Facebook, enter the local Facebook ID.
      1. To find your Facebook ID, simply plug the URL into [http://findmyfacebookid.com/](http://findmyfacebookid.com/)
   e. Sponsor name (5): This contains key information to render your website correctly, as well as a place to include your Event Photo feed. **IMPORTANT**: Do not edit or delete the information to the left of the comma.
      If your event has a page on Flickr or Instagram, enter the page ID to enable your Flickr/Instagram photo gallery populating to the EVENT PHOTOS section on your website.

12. **Sponsor name (5):**
    
    activeMasterBlue,instagram=61762918@N04
    
5. Click ‘Finish’

Edit Event Coordinator Properties

1. Name: Verify ACS Staff Person name
2. Phone: Verify ACS Staff Person phone
3. Email: Verify event email*
4. Click ‘Finish’

Submit Event Changes

We have a centralized process for submitting various types of event requests, which allows us to update all American Cancer Society databases.
1. Log into EMT
2. Scroll down to the ‘Resources’ section
3. Click the Update an existing event link
4. This link will take you to the Event Change Request Form
5. Complete and submit this form. Please fill out all required fields, and be very specific about the change(s) you are requesting.

See Appendix B for more information on submitting different event change requests.

Chapter 3: Edit Greeting Page

Using the Edit Tool

1. Click the pencil icon to open your Greeting Page for editing!
2. Save your changes often
3. Click the X to close out and automatically refresh your page

Change Your Banner Image

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Add Local Sponsors

Top event sponsors can be given special recognition for their commitment on the event website. This recognition is highlighted on the event home page as a horizontal scroll under the “Our Sponsors” section.

1. Click the + to Add New Sponsor Logo
2. Choose the image size template
3. Select the image file and adjust image and click save.
4. Please view the Edit Your Local Sponsors page for instructions on updating the page linked under All Sponsors.

*Suggested Image Sizes for Sponsor Logos:

- 3x1: 284x84 px
- 2x1: 184x84 px
- 1x1: 84x84 px

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Special Note about Logo Files
File size maximum: 1 MB per logo. Accepted file extensions: .gif, .jpg, .png, .bmp. If you receive a Photoshop file (.eps), please request an acceptable file from the list above. For the best results, resize prior to uploading them to the image library using the web-based service http://www.picresize.com/.

Chapter 4: Edit and Create Content Pages

Using the Edit Tool

1. Click the pencil icon to open your website for editing!
2. Save your changes often
3. Click the X to close out and automatically refresh your page
4. Click the page icon to open the Page Manager
5. Click MORE DETAILS to edit your Event Details page

Manage Your Custom Pages

Publish your page to add it to the More Info section
Delete your pages
Create a custom page by giving it a name and SAVE
Click the page name to edit your page

Pages can also be accessed and promoted using the URL that appears in the browser when the custom page is open. You can copy and paste this URL to use in emails and social media.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Customize Your Page

Add new sections from the template library to build your perfect page.

Publish each section.

Select a *template to add to your page.

Sort and delete your sections.

*Suggested Image Sizes for Image Templates:

- Image & Text: 250x250 px
- Image & Caption: 800x400 px
- Banner Image: 1440x350 px

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Update Event Photos
The local event Greeting Page is set up to showcase local walk photos under the “Event Photos” section. These photos are pulled in based on the local event Flickr ID or Instagram album ID. If an event does not have a local Flickr ID or Instagram ID, then the national Flickr account will be used.

Examples of photos to highlight on this section of the website:
- Photos from previous walks including survivors, families, friends, teams, walkers, the venue, entertainment, and more. Anything that is an engaging image showcasing the excitement of the day of the walk.
- Photos from team or company fundraisers in the community- showcase the different fun ways to raise money
- Photos from pasta dinners or other lead-up events- show how you are bringing people together year-round.

Examples of photos that are not a good fit for this section:
- Sponsorship logos- Update your scrolling sponsor logo section or the Become a Sponsor page to feature your sponsor logos. See Sponsor Logo Guide.
- Flyers advertising team fundraisers or community events- This is a great fit for the Event Announcements page. See more details on updating this page in the Event Announcement Guide.
- Low quality photos that do not translate well to the web or mobile- remember the photos will be display on a small phone screen or a large desktop monitor.

When to use Flickr vs Instagram for your local event photos:
The Event Photos section of the Greeting Page can showcase local photos from your event utilizing either Flickr or Instagram.

Instagram: The Event Photos section will pull in the photos featured in an Instagram album. With this feature you can dedicate a specific album to photos you want to feature on the event website. However, whenever you need to add or delete a photo a new album must be created with all the photos you want to feature and follow the steps to update the id in the website. This is a great option if you are trying to drive new followers to your event’s Instagram account. A well-maintained Instagram account does require frequent updating so please be sure to have staff or volunteer time dedicated to engaging participants through this social media channel.

Benefits to Instagram:
- Links back to Instagram account for gathering followers
- Can select photos specifically for the website to put in an album
- Utilizes a social media channel an event may already be using

Limitations to Instagram:
- Changes to photos require a new album and updating the ID on the event website for every addition or deletion
- Event Instagram account should be updated regularly to keep followers engaged
- Limited to 10 photos

Flickr: The Event Photos section will pull in the photos from a Flickr Photostream based on the most recently added
If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.

photos appearing first. This is a great option to easily add or delete photos and not have to update the ID tied to the website. If your event can not frequently update an Instagram account or this social channel does not reach the participants in your community, then Flickr would be a better option.

**Benefits to Flickr:**

- ID only needs to be linked to the website once
- Easy to add and delete photos
- No limit to the number of photos

**Limitations to Flickr:**

- Will pull in all photos in the Photostream
- Will not link to a social media account for participants to follow and be more engaged
- An event may need to set up a Flickr account

**To add to the Event Photos section using Flickr:**

1. Create or log-in to your account at [www.flickr.com](http://www.flickr.com)
2. Click the Upload icon to upload photos to the Photostream.
3. To find the Flickr ID, click on “You” in the menu bar select Photostream.
4. Copy the Flickr ID found in the URL after the flickr.com/photos/ (i.e. 148277532@N05)
5. Log into the Event Management Center.
6. Click on the Event Center tab and then Edit Event Properties.
7. Paste the Flickr ID into Sponsor Line 5 after the = sign. Click Finish. **WARNING**: Do not edit or delete the information to the left of the equals sign (=).

12. **Sponsor name (5):**

    ![Image](activeMasterBlue,instagram=61762918@N04)

Simply add new photos to the Flickr Photostream to have them updated on your Event Photos section on the website. Photos will display in the order of most recently added so put your favorites at the top!
**To add the Event Photos section using Instagram:**

1. Create an album on Instagram
   
   a. Click 📷 to add photos
   b. Click 📷 to select up to 10 photos and create your album

2. Get your Instagram album URL
   
   a. Click the 3 little dots ⬇️ to open album options
   b. Select Copy Share URL

3. Log into the Event Management Center.

4. Click on the Event Center tab and then Edit Event Properties.

5. Replace the contents AFTER the equal sign with the URL you just copied. **WARNING:** Do not delete or edit anything to the left of the equals sign (=)

6. Click Save and Finish.

*Simply repeat the steps above to create a new album each time you want to add new event photos!*

*If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.*
Chapter 5: Event Emails

- Create and Customize a local email
- Copy a National Email Template to Customize
  - Customize your newly copied email message
- Insert Documents and Photos
  - Create a link to a document
  - Insert an image
- Send your local email
  - Send an Engagement Email to Current Event Participants
  - Send a Recruitment Email to Prior Event Participants
- Review a sent and scheduled messages

Create and Customize a New Email

1. From the EMC, click Event Emails.

2. Under Related Actions, select Edit Coaching Emails.

3. Click Create a new message from the Related Actions (left hand side of the page).

4. A Process Navigator is displayed on the left to guide you through the 7 step process of customizing your local email message.
a. **Step 1 – Message Information**: Specify the following information for internal identification of your message. Your recipients will not see this information. *(screen shot on following page)*

   i. **Message Name**: Enter a message name that will help uniquely identify the email when browsing the messages list of the Event EMC. This field is required.
   
   ii. **Description**: Enter a brief statement about the email purpose. This field is not required.
   
   iii. **Select the message type**: If you wish to group similar messages together for organizational or reporting purposes, select a type of message from the drop down menu. This field is not required.
   
   iv. **Duplicate Suppression**: Always leave duplication suppression marked as Yes.
   
   v. Click Next.

b. **Step 2 – Envelope**: Specify the following information.

   i. **Enter the sender’s name**: Enter who the email is “from.” It is recommended that the sender name follow the standard “Event Name” in addition to any personalization.
   
   ii. **Enter the sender’s email address**: Enter event email address.
   
   iii. **Enter the subject line of this message**: Enter the phrase that you want recipients to see as the email subject. Keep subject lines short and sweet!
   
   iv. Click Next.

*If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.*
c. **Step 3 – Stationery:** The stationary has already been selected for you. click **Next.**

d. **Step 4 – HTML Content:** Use the WYSIWYG toolbar to create the content of your email.

   i. Click the **Preview** button to review the message layout and to check for typos and test links.
   
   ii. Once you have previewed and saved your message, click **Next.**

e. **Step 5 – Plain Text Content:** Click the **Convert to Plain Text** button to update the message you wrote in HTML content into Plain Text formatting. All HTML code (like font changes and images) will be removed but link-specific code will remain. You do not have to edit this coding

   i. Determine if any changes need to be made to the Plain Text formatting. Some things to look for are inconsistent spacing and placement of hyperlinks. When converting HTML content to plain text, hyperlinks will be moved to the end of a paragraph. Adjust your text as necessary. For example, you may choose to insert something like “*Use the link below...*” if you have embedded a link behind some text.
   
   ii. Click the **Preview** button to review the message layout and to check for typos and test links.
   
   iii. Once you have previewed and saved your message, click **Next.**

f. **Step 6 – Send Review Email:** Send a test message to yourself or another person to proof read.

g. **Step 7 – Approve:** Click **Approve** to identify this message as ready to send.

   h. Click **Finish.**

   If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
i. After approving the email for delivery, you’ll be returned to the **Message List**.

<table>
<thead>
<tr>
<th>Relay For Life Welcome Message</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Copy</strong></td>
</tr>
</tbody>
</table>

| i. **Copy:** Copy the format of your message to create a new email with the same look and feel. |
| ii. **Delete** or **Archive:** Deleting and/or archiving an email will provide you an opportunity to manage the list of emails as they appear in the EMC. |
| iii. **Preview:** Preview the message in HTML and Plain text by clicking the Preview link. |
| iv. **Return to Draft:** Once an email has been approved, you can no longer edit it. Unless you move it back to a draft. |
| v. **Begin Delivery:** Choose Begin Delivery to begin the process of sending your message to the proper recipients. *More information about sending an email can be found later in this chapter.* |

**Copy a National Email Template to Customize**

There are a variety of pre-written email templates available to you in your Coaching Email Center. You can send ‘as is’ or modify and add custom content. The email template must be copied and approved before you can send it.

1. From the EMC, click **Event Emails**.
2. Under Related Actions, select **Edit Coaching Emails**.

3. A list of all available email messages will display.

4. Find the email you wish to send in the list, and click **Copy** next to the message name.

5. Confirm your copy, and complete the action by clicking the green **Copy Message** button.

6. Once your message has been copied, a new version will be available for editing.

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If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Customize your newly copied message

1. Find your newly copied email message in the list and click **Edit** next to the message name.

2. A **Process Navigator** is displayed on the left to guide you through the 7 step process of customizing your local email message.
   a. **Step 1 – Message Information:** Do not change. The email templates were all created with a specific naming convention, to allow for reporting on the success of the campaign.
      i. Click **Next**.

   b. **Step 2 – Envelope:** Specify the following information:
      i. **Enter the sender’s name:** Enter who the email is “from.” It is recommended that the sender name follow the standard “Event Name” in addition to any personalization.
      ii. **Enter the sender’s email address:** Enter event email address.
      iii. **Enter the subject line of this message:** The email templates already contain Subject Lines that match the email content. You can leave ‘as is’ or updated with your own.
      iv. Click **Next**.

   c. **Step 3 – Stationery:** Select a stationary which will give each email a look or theme. After selecting your stationary, click **Next**.

   d. **Step 4 – HTML Content:** Use the WYSIWYG to add custom content to the email message.
i. Click **Save** often, so as not to lose your edits.

ii. Click the **Preview** button to review the message layout and to check for typos and test links.

iii. Once you have previewed and saved your message, click **Next**.

e. **Step 5 – Plain Text Content:** Click the **Convert to Plain Text** button to update the message you wrote in HTML content into Plain Text formatting. All HTML code (like font changes and images) will be removed but link-specific code will remain. You do not have to edit this coding.

   i. Determine if any changes need to be made to the Plain Text formatting. Some things to look for are inconsistent spacing and placement of hyperlinks. When converting HTML content to plain text, hyperlinks will be moved to the end of a paragraph. Adjust your text as necessary. For example, you may choose to insert something like “Use the link below...” if you have embedded a link behind some text.

   ii. Click the **Preview** button to review the message layout and to check for typos and test links.

   iii. Once you have previewed and saved your message, click **Next**.

f. **Step 6 – Send Review Email:** Send a test message to yourself or another person to proof read.

g. **Step 7 – Approve:** Click **Approve** to identify this message as ready to send.

h. Click **Finish**.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
i. After approving the email for delivery, you’ll be returned to the **Message List**.
   ii. **Copy**: Copy the format of your message to create a new email with the same look and feel.
   iii. **Delete** or **Archive**: Deleting and/or archiving an email will provide you an opportunity to manage the list of emails as they appear in the Event Manager Center.
   iv. **Preview**: Preview the message in HTML and Plain text by clicking the Preview link.
   v. **Return to Draft**: Once an event has been approved, you can no longer edit it. However, by returning the email to a Draft state, you can edit the content of the email.
   vi. **Begin Delivery**: Choose Begin Delivery to begin the process of sending your message to the proper recipients. More information about sending an email can be found later in this chapter.

### Insert Documents and Photos

You can add local photos and documents to your event emails. Reference [Chapter 3: Manage Event Library](#) for instructions.

#### Insert a Document Link into an Email

Note: Document must be uploaded into the Event Library before you can create a link.

1. From the EMC, select the **Event Emails**.
2. Under **Related Actions**, choose **Edit Coaching Emails**.
3. Follow the necessary steps to create and edit the email you wish to add the document to.
4. On step 4. **HTML Content**, create your desired link text by typing directly onto the email (i.e. View the flyer here).
5. Highlight the text you’d like to be a link, then click the **Insert/Edit Link** button from the WYSIWYG tool bar.
6. From the link drop down menu at the bottom of that list, you’ll find all the documents you have uploaded in your document library.

7. Change the Target to Open link in a new window.

8. Click Insert.

9. Once you save that email, the highlighted words will become a link to the document.

**Insert an Image into an Email**

1. From the EMC, select the Event Emails.

2. Under Related Actions, choose Edit Coaching Emails to find the email you wish to edit.

3. Follow the necessary steps to create and edit the email you wish to add the image to.

4. On step 4, HTML Content, place your cursor at desired location in the email where you would like to add the picture.
   a. Choose the Insert/edit Image button from the WYSIWYG tool bar.

*If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.*
b. From the Image List drop down menu, you’ll find all the images you have uploaded in your image library.

c. Select the image you wish to insert.

d. Select right, center, or left alignment to wrap the text around the image.

e. Adjust dimensions to a width not greater than 600 px to fit the template. The height will automatically adjust.

f. Add space of 2-5 px either vertically or horizontally around the image to add spacing between the image and the text.

g. Click Insert.

h. The image will appear on the webpage.

i. Once you save that page, the image will appear on the website.

---

**Send your Local Message**

After creating, customizing, and approving your local email, follow the necessary steps to see the message delivered to the appropriate individuals.

1. From the EMC select the Event Emails.
2. Under Related Actions, select **Edit Coaching Emails**.

3. Locate the customized and approved message you wish to send. Click **Begin Delivery** beside the email.

4. Select the **audience** to receive this email.

**Send an Engagement Email to Current Event Participants**
An Engagement Email is used to ‘engage’ your currently registered participants.

1. Locate the customized and approved message you wish to send. Click **Begin Delivery** beside the email.

2. Select the **audience** to receive this email. When sending an Engagement Email Message, select **Current Event Participants**. (If you are sending a “Recruitment” email, follow these step-by-step instructions.)

   ❖ **It’s important you never select the Current or Previous Event Donors for your email audience.** Those contacts were ‘recruited’ by the family and friends they donated to, and we (ACS) shouldn’t step in and intercede. The participants should continue to maintain the relationship with donors.
3. Click Next.

4. Select Participation Types:
   a. Highlight the group you wish to send the email to. Click the **Add** or **Add All** green buttons to select those groups.
   b. To select multiple groups, hold **CTRL** as you select two or more groups.
   c. Once all the appropriate groups have been added to the **Your Selection** box, click **Next**.

2. Apply any optional filters on the recipient list. Filters allow you to narrow the email recipient list by a number of factors such as team captain status or registration date. See Appendix E for more information on the different filters and how to use them!

3. Registration Filters:
   a. No action is required in this step.
   b. If you do wish to apply a registration filter, select from the available Registration Filter options:
      i. **Previous Event Participation Filter**: Filter the currently registered participant recipients of the email to whether or not they participated in the past.
      ii. **Online/Offline Registration Filter**: Allow the email to be sent to both online and offline registrants.
      iii. **Date Range**: Choose to filter the email recipients based on when they registered.
   c. Click **Next**

4. Team Filters:
   a. No action is required in this step.
   b. If you do wish to apply a team registration filter, select from the available Team Filter options:
      i. **Team Membership Filter**: Identify if you wish to filter the currently registered participant email recipients by team captains, team members, or individual walkers.
      ii. **Company Affiliation Filter**: Filter the email list further by the participants’ corporate affiliation.
   c. Click **Next**

**Tip:** if you wish to send a message to Team Captains Only (for example: meeting notices), make sure only the “Team captain” box is checked so that the message will be sent to Team Captains registered for your event.
5. **Review Delivery Details:**
   
a. Confirm the **target groups** are the email addresses that you wish to send the message to.
b. The Unsubscribes or Opt Outs are automatically included in the **Do Not Mail List**.
c. The Final Step is to click **Send Immediately**.

After selecting Send Immediately, the message will be immediately delivered to the recipients’ inboxes and the email process will have been completed. *(skip down to d. if you would prefer to schedule your email for a future date/time)*

d. If you prefer to send the email at a later time, you can schedule the delivery of the message. Under Related Actions (left hand side of the page), click **Schedule**.
   
i. Select the **date** and **time** you would like the message to be sent. **Note: All times are set to Central Standard Time.**
   
ii. Click **Finish**.
   
iii. Finally, return to the email delivery page and click **Send At Scheduled Time**. This places the message in a queue to be sent at scheduled date and time. This completes the email process.

---

**Send a Recruitment Email to Prior Event Participants**

A Recruitment Email is used to ‘recruit’ your past participants and invite them back to your event for the current season.
1. From the Message List tab, locate the customized and approved message you wish to send. Click **Begin Delivery** beside the email.

2. Select the **audience** who are to receive this email. When sending a Recruitment Email Message, select **Previous Event Participants** to select the participants from previous year or **Groups Created by this Event** to select multiple years of participants or custom email groups.

   - **It’s important you never select the Current or Previous Event Donors for your email audience.** Those contacts were ‘recruited’ by the family and friends they donated to, and we (ACS) shouldn’t step in and intercede. The participants should continue to maintain the relationship with donors.

3. Click Next

4. Select Previous Event Participation Types:
   a. Highlight the prior event participation types you wish to send the email to. Click the **Add** green button to select those groups.
   b. To select multiple groups, hold **CTRL** as you select two or more groups. Do not choose donor email groups.
   c. Once all the appropriate groups have been added to the **Your Selection** box, click **Next**.
5. Review Delivery Details: For Recruitment Emails, you MUST set up the current event participants as a ‘Do Not Email’ group – since they are already registered and we do not want to invite them again!
   a. From the message review page, click the link to Manage Do Not Email Groups under Related Actions on the left.

6. Manage Do Not Email Groups: Select Current Event Participants

7. Click Next

8. Select Do Not Email Groups: Click Exclude All >> This will ensure that everyone already registered for your event will not receive an email asking them to register again.
   a. Click Exclude All>>
   b. Click Finish

6. Review Delivery Details:
   a. Confirm the target groups are the email addresses that you wish to send the message to.
   b. The Unsubscribes or Opt Outs are automatically included in the Do Not Mail List. Make sure that all your current event participation types are also included in the Do Not Mail List.
   c. The Final Step is to click Send Immediately. After selecting Send Immediately, the message will be immediately delivered to the recipients’ inboxes and the email process will have been completed.
   d. If you prefer to send the email at a later time, you can schedule the delivery of the message. Under Related Actions (left hand side of the page), click Schedule.
      i. Select the date and time you would like the message to be sent. Note: All times are set to Central Standard Time.
      ii. Click Finish.
      iii. Finally, return to the email delivery page and click Send At Scheduled Time. This places the message in a queue to be sent at scheduled date and time. This completes the email process.
Review Sent and Scheduled Messages

1. From the EMC, click Event Emails.

2. Under Related Actions, select Edit Coaching Emails.

3. Select the Delivery List tab.

4. From the Delivery List tab, you can:
   a. Review the Status of your message as Sent or Schedule. The date of those deliveries or scheduled deliveries will appear in the Schedule and Completed columns.
   b. For Sent emails:
      i. After the message has been sent, the Open and Click Rates of your message will allow you to monitor the success of each communication.
      ii. Click Review to get further details on the delivery of the email.
   c. For Scheduled emails:
      i. After the message has been scheduled, you may review when the message is set for delivery.
      ii. Click Cancel to stop the message from being delivered or to change the delivery date/time.
Chapter 6: Customer Service – Manage Participants

- Search for Participants
- View a Participant’s Gift History
- Edit the Registration Information of a Participant
  - Update a Participant’s Basic Registration Information
  - Delete a Participant’s Online Registration
  - Make a Participant’s Webpage Private
- Edit the Team Information of a Participant
  - Move a Participant to a Team
  - Create a New Team with a Participant as Team Captain
  - Promote or Demote Team Members and Team Captains

Search for Participants

1. From the EMC, click Customer Service in the top Navigation Bar.

2. Under Related Actions, select Manage Participants.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

![Search for Participants](image)

- To search for a participant, enter first name, last name, and/or email address in the search fields before clicking **Finish**.

**TIP:** Use % for wildcard. Example: *Jon%* if you are trying to find Jon or Jonathon.

4. Beside the participant’s account, click **Manage Participant** to access the participant’s profile.

![Manage Participant](image)
View a Participant’s Gift History

1. From the EMC click Customer Service.

2. Under Related Actions, select Manage Participants.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Beside the participant’s account, click Manage Participant to access the participant’s profile.

5. On the participant’s account record, scroll to the bottom of the page. View the Gift History section.

Within the participant’s gift list, you can change the honor roll name, gift soft credit, or refund the donation. See Chapter 9: Manage Gifts for detailed steps.
Edit the Registration Information of a Participant

Update a Participant’s Basic Registration Information

1. From the EMC, click **Customer Service**.

2. Under Related Actions, select **Manage Participants**.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Beside the participant’s account, click **Manage Participant** to access the participant’s profile.

5. From the participant record, under **Related Actions** (left hand side of the page), click **Edit Registration**.
a. Make changes to the individual’s online registration as needed:
   i. Update the individual’s participation type from the drop down.
   ii. Change the participant’s individual fundraising goal.
   iii. Add emergency contact information
   iv. Click Next.

b. Edit the registration responses. Click Next.
c. Click Finish.
Delete a Participant’s Online Registration

When you deactivate a participant:

- The participant will be removed from the group of participants for this event.
- The participant will be removed from the list of pending autoresponders for this event.
- The participant will not be displayed in search results when donors, people who want to join their team and other site visitors perform searches.
- The participant cannot log into the Dashboard nor access their Personal Page.

Before making the participant inactive or deleting the registration, you must make sure that the individual is not a Team Captain. If the individual is a team captain, you must follow the steps below before successfully removing the online registration:

- Assign a new team member to the captain position
- Remove the initial team captain from all teams

1. From the EMC, click Customer Service.

2. Under Related Actions, select Manage Participants.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Beside the participant’s account, click Manage Participant to access the participant’s profile.

5. From within the participant record, under Related Actions (left hand side of the page), click Make Inactive.

6. Click Make Inactive to deactivate the participant’s registration.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
7. Once you have made a contact inactive, the **Delete Registration** option will appear under the Related Actions side bar.

8. Follow the steps to complete the deletion process. The participant will no longer be registered.

**Make a Participant’s Registration Private**

*Note: Making a participant’s registration private prevents donations from being made and site users will not be able to search for the participant.*

1. From the EMC, click **Customer Service**.

2. Under Related Actions, select **Manage Participants**, and search for the participant record.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Click **Manage Participant** to access the participant’s profile.

5. From the participant record, under **Related Actions** (left hand side of the page), click **Make Private**.
6. Select **Make Private**.

7. The record will reflect this update.

---

**Edit the Team Information of a Participant**

**Move a Participant to a Team**

1. From the EMC, click **Customer Service**.

2. Under Related Actions, select **Manage Participants**.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Click **Manage Participant** to access the participant’s profile.
5. From the participant record, under Related Actions (left hand side of the page), click Change Team.

6. Select the new team from the list, or use the Search feature to locate it easily.

7. Click Select next to the correct team name. Then confirm by clicking Finish.

Note: Changing the team membership of an individual will only be reflected on the event website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please submit a ticket at helpme.cancer.org or reach out to your ACS staff partner.

Create a New Team with a Participant as Team Captain

1. From the EMC, click Customer Service.

2. Under Related Actions, select Manage Participants.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Click Manage Participant to access the participant’s profile.

5. From the participant record, under Related Actions (left hand side of the page), click Create New Team.
6. Enter the new **Team Name**, **Goal**, and Choose a **Company** (if necessary).

7. Click **Finish** to save changes. This participant will now be the captain of the new team.

*Note*: Changing the team membership of an individual will only be reflected on the event website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please submit a ticket at helpme.cancer.org or reach out to your ACS staff partner.

**Promote or Demote Team Members and Team Captains**

1. From the EMC, click **Customer Service**.

2. Under Related Actions, select **Manage Participants**.

3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Click **Manage Participant** to access the participant’s profile.

5. From the participant record, under **Related Actions**, click **Promote to Captain** or **Promote to Co-Captain**, depending on the desired leadership level.
   a. Click **Finish** to save.
6. For “Team Captains” you wish to demote to Team Member Status:
   a. Begin by promoting a new team captain by clicking the **Promote to Captain** link on the left hand side under Related Actions within the record of the participant who is becoming the new leader.
   b. Once a new participant has been promoted to Team Captain level, the initial leader will automatically be demoted. This change will take a few moments to update to all areas of the Event Management Center and the front-end of your website.

**Chapter 7: Customer Service – Manage Teams**

- **Search for a Team**
- **View Team Member Roster**
- **View Team’s Gift History**
- **Edit a Team’s Registration Information**

**Search for a Team**

1. From the EMC, click **Customer Service** in the top Navigation Bar.
2. Under Related Actions, select **Manage Teams**.
3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

**TIP:** When searching, use % for wildcard. Example: *Walk%* if you are trying to find *Walking* or *Walkers*.

4. Click **Manage** to access the Team profile.

---

**View Team Member Roster**

1. From the EMC, click **Customer Service**.

2. Under Related Actions, select **Manage Teams**.

3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

4. Click **Manage** to access the Team profile.

5. On the team’s account record, scroll to the bottom of the page and click the **Members** tab to full a complete list of team members.

*If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.*
View a Team’s Gift History

1. From the EMC, click Customer Service.

2. Under Related Actions, select Manage Teams.

3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

4. Click Manage to access the Team profile.

5. On the team’s account record, scroll to the bottom of the page. View the Gift History section.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Within the team’s gift list, you can change the honor roll name, gift soft credit, or refund the donation. See Chapter 9: Manage Gifts for detailed steps.

Edit a Team’s Registration Information

1. From the EMC, click Customer Service in the top Navigation Bar.

2. Under Related Actions, select Manage Teams.

3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

4. Click Manage to access the Team profile.

5. From the team record, under Related Actions, click Edit Team Details.
6. Make changes to the team’s online registration as needed:
   a. **Team Name**: Edit the team name.
   b. **Team Goal**: Update the team fundraising goal.
   c. **Team Company**: Associate the team with a company.
   d. Click **Finish** to complete the changes.

   ![Team Registration Screen]

   **Note**: Changing the soft credit of a donation will only be reflected on the event website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please submit a ticket at helpme.cancer.org or reach out to your ACS staff partner.

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**Chapter 8: Customer Service – Manage Companies**

- [Add a Local Company](#)
- [Edit the Local Company Details](#)

**Add a Local Company**

If you have corporate teams participating in your event, you can create a company record in the Event Management Center. Once the company has been added to the website, anyone who registers as a team from that company will be able to select the business name from the ‘Company’ dropdown during the Team registration process.

National company supporters are automatically included in the website so you do not need to add those.

1. From the EMC, click **Customer Service**.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
2. Under Related Actions, select **Manage Companies**.

![Image of Customer Service menu with Manage Companies option highlighted]

3. A list of all local companies will be displayed. To add a new company, under **Related Actions** click **Add a New Company**.

4. Complete the following:

   a. **Name and Notes**: Complete the required fields (marked with an asterisk below)
      i. *Company Name*
      ii. *Public Company Name*
      iii. Notes - can skip
      iv. *Goal*
      v. You can skip questions 5-7 and 9-13 (Company Hierarchy Options, Company Priority, Number of Employees, Details, Staff Contact)
      vi. *New Company to this TeamRaider*
         • If the company is new, leave the box checked
         • If they are a returning company, you can uncheck the box
      vii. Click **Next**

   b. **Identify Company Coordinator**:
      i. Leave blank
      ii. Click **Next**.

   c. **Identify Executive Champion**
      i. Leave blank
      ii. Click **Next**

   d. **Review Summary**:
      i. Review the details of your company
      ii. Click **Finish**

5. Once you click ‘Finish’ the new company will appear in your Local Companies List, and will be available for teams to select during the registration process.

**Edit the Local Company Details**
1. From the EMC, click Customer Service in the top.

2. Under Related Actions, select Manage Companies.

3. A list of all local companies will be displayed. Locate the one you wish to edit and click Edit Company.

4. Follow the progress bar on the left hand side of the page to edit company information.

Edit the Local Company Page

If you need to edit the local company page, to add custom content or a logo, there must first be a waiver filled out by

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
Chapter 9: Customer Service – Manage Gifts

- Search for Gifts
- Change the Honor Roll Scroll on a Participant’s page
- Move the Credit of a Donation to another Participant or Team
- Refund a Donation

Search for Gifts

1. From the EMC, click Customer Service.
2. Under Related Actions, select Search for Gifts.
3. Enter any information you know about the donor and/or donation, including:
   a. Donor’s first / last name or email address
   b. Participant’s name who the donation is credited to
   c. Confirmation code of the donation as listed on the gift receipt
   d. Value of the donation
   e. When the gift was made online
   f. Use % for wildcard. Example: Jon% if you are trying to find Jon or Jonathon
4. Click Finish to perform the search.
Change the Honor Roll Name on a Participant’s Page

Some donors may choose to be referred to by a different name or to remain anonymous. As the event manager, you may update how the donor and donation is displayed on each participant page.

1. From the EMC, click **Customer Service**.

2. Under Related Actions, select **Search for Gifts**.

3. Enter any information in the search fields provided, enter the available information about the donation. Click **Finish** to perform the search.

4. Find the donation whose appearance in the Honor Roll you wish to update. Beside the gift record, click the **View/Edit** link.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
5. Skip to step 2. Configure Gift

6. Specify and update the necessary information:
   a. Do Not Display Amount: Check the box beside “Do not display the gift amount” if the donor does not wish to have his/her donation amount displayed publicly on the personal page.
   b. Recognition Name: If this field is left blank, the Recognition Name is defaulted to the donor’s Name, but you can update the donor’s name as s/he wishes it to appear on the Honor Roll. If the donor wishes to remain anonymous, enter “Anonymous” in the field provided.

7. Click Finish to save changes to the donation’s appearance in the Honor Roll.

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Move the Credit of a Donation to another Participant or Team

1. From the Event Management Center, click Customer Service in the top Navigation Bar.

2. Under Related Actions, select Search for Gifts.

3. Enter any information in the search fields provided, enter the available information about the donation. Click Finish to perform the search.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
4. Beside the gift you wish to move, click the **Change Soft Credit** link.

![Image of Change Soft Credit link](image)

5. Identify who will receive credit for the donation. You can adjust the gift credit to a participant, team, or the general event. Click the appropriate **radio button** before clicking **Search for Recipient**.

![Image of Search for Recipient](image)

6. Identify the recipient of the donation through the list provided or through a search. Click **Select** next to the person or team to whom you are reassigning credit for the donation.

![Image of Participant List](image)

7. **Confirm Changes**: Review the transaction information and the change in soft credit before confirming. If it is correct, click **Finish** and the credit of a donation will be moved.

*If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.*
**Note:** Changing the soft credit of a donation will only be reflected on the website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please submit a ticket at helpme.cancer.org or reach out to your ACS staff partner.

**Refund a Donation**

As the Online Chair, you may be requested to refund part, or all, of an online credit card gift.

1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.

2. Under Related Actions, select **Search for Gifts**.

3. Enter any information in the search fields provided; enter the available information about the donation. Click **Finish** to perform the search.

4. Beside the gift you wish to move, click the **Refund** link.
5. **Enter the amount** that you wish to refund to the donor.
   a. Leave refund amount field ‘as is’ if you wish to process a full refund.
   b. You can enter a smaller amount if the donor only wishes to have a partial refund (ex. They entered $100, when they meant to only enter $10. You will refund $90)
   c. Confirm that the gift is to be **returned to the initial credit card** before clicking **Next**.

![Refund for Ms. Laura Housfeld](image)

6. Click **Finish** to confirm the refund.

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**Chapter 10: Reports**

- [Access Reports](#)
- [Run and Download Reports](#)
- [Utilizing the Report Results Tab](#)
- [Accessing Past Event Manager Centers and Reports](#)
Access Reports

1. From the EMC, click Reports.

2. On the Reports page, you will see:
   a. **Name and Description**: The name and description of each available report is listed in the first column.
   b. **Actions**: Click Run Report to begin running the report.

*See Appendix G for a Comprehensive Reports Guide.*
Run and Download Reports

1. From the EMC, click Reports.

2. A list of all available reports will be displayed. Locate the report you would like data from. Click Run Report under the Action column beside the appropriate report.

3. Follow the prompts and the Process Navigator on the left hand side of the page will help navigate you through the reporting process.
   a. Step 1a – Edit Runtime Parameters: If the report has been built to allow for a custom date range, enter the parameters from which you would like to gather data. Most reports do not have editable parameters and therefore, you will not see this step.
   b. Step 1b – Identify Result: Provide a custom report name or description to help you identify the results before clicking Next
      i. If you manage multiple events, you may want to add the Event Name to the Report Label, so you can easily identify results from one event to the next.
   c. Step 1c – Report Criteria Summary: Review the report summary page and click Run Report at the bottom of the page to begin the data collection process.
4. The report will display as soon as the task completes. The following actions will be available:

   a. **Download**: Click the disc icon to download the report in any of the following three formats:
      i. CSV – comma separated values format. **This is the best format to use.**
      ii. PDF – Adobe Acrobat portable document format
      iii. HTML – hypertext markup language format
   b. **Print**: Click the printer icon to print the report results to your printer.

**Note**: There will be times that reports will not always appear right away and you may need to retrieve your results from the Report Results tab.

**Utilizing the Report Results Tab**

1. From the EMC, click **Reports**.

2. To review the results of the reports that you have previously pulled, switch to the **Report Results** tab.

3. The **Report Results List** page will display the reports that have been generated from your website.
   a. Reports will only be saved in the Report Results tab for 200 hours after first being pulled.

4. Click on the appropriate related actions from the actions column to **View**, **Download**, **Print**, or **Delete** the data.
Accessing Past Event Manager Centers and Reports

1. From the EMC, click + **Switch To Another Event**.

2. Use the search function to find the past event you want to access data for.

3. Click **Manage This Event** beside the event you wish to access.

4. You will be directed to the prior year Event Manager Center from which you may pull reports or access previous participant information.

**Note:** Your prior year event will only appear in this list if you were an Event Manager from that year. If you did not have access to the Event Manager Center previously, please contact helpme.cancer.org for log in permissions.
Appendix A: EMC Access for Staff and Volunteers

The Event Management Center (EMC) access process requires ALL Event Managers (both staff and volunteers alike) to review two EMC training videos before receiving EMC access to their event website.

**Staff** should follow the following process:
1. Log in to Society Source
2. Under **Quick Links**, click on **Society Pathways**
3. Launch Society Pathways, and locate the webinars by searching for ‘Online Event Manager’ – there are two: one on Event Site Management, and one on Participant Management
4. Select ‘Start’ to launch either course
5. Upon completion of the training module, staff will need to complete the EMC Access Request Form. Users will receive access within 2-3 business days.

**If you have already completed the staff trainings, but did not submit the form, you can simply visit helpme.cancer.org to submit your EMC access request!**

**Full online chair volunteers** should follow the following process:
1. Go to the Volunteer Learning Center [https://volunteerlearning.cancer.org/](https://volunteerlearning.cancer.org/)
2. Log in if you are a returning volunteer, or register to create a new account
3. Click on Find Courses
4. Find the webinar you want to listen to by searching for “Event Manager” – there are two: one on Event Site Management, and one on Participant Management
5. Select Yes to enroll in either course
6. Once in the course you can listen to the webinar and/or download the training guide
7. Following the completion of the training module, the volunteer will need to complete the EMC Access Request Form. They will receive access within 2-3 business days.

**If you have already completed the trainings on the VLC, but did not submit the form, you can simply log back in and follow the instructions above to locate the webinars you took. The link to the EMC Access Request Form will be available under the completed trainings.**
Appendix B: Submitting Event Changes

**What to submit through EMT:** If you are requesting a change to the event details (date, time, location, staff partner, etc.) the change should be submitted by ACS staff through the Event Change Request form, and the SSBC team will make those updates in all systems.

1. Visit [helpme.cancer.org](http://helpme.cancer.org)
2. On the Home screen, under the ‘Online Event Support’ section, select **Update an Existing Event**
3. A new page will open, taking you to the Event Change Request Form
4. Please be thorough when completing this form to ensure all your event details are accurate

**What to submit through a Help Ticket:** If you are requesting a change to a national business standard (registration fees, discount codes) you should submit an event website help ticket at [http://helpme.cancer.org](http://helpme.cancer.org), as those updates can only be made by third level support.

Appendix C: Online Email Campaign Best Practices

Email messaging for is an essential component and for a successful overall event. An email campaign can foster great fundraising and team building plus community collaboration. This email campaign includes:

- Recruitment messages: Recruitment messages are emails sent to past participants or community supporters encouraging them to register for the event.
- Engagement messages: Engagement emails are messages directed to registered participants for various purposes like encouraging their efforts, providing tips, and keeping them updated on event happenings.

**Email “Rules”**

**Why event emails must be sent from the Online Email Tool**

All emails that are sent to support a local event must be sent from the Event Management Center for the following reasons:

- Emails sent from the website are 100% compliant with American Cancer Society privacy policy, US CAN SPAM Laws, spam filters, participant “do not mail” preferences.
- Once an email is sent from the Event Management Center, the event can track how many people open, read, click, register and donate through your emails.
- It’s easy to stay in touch with everyone as the email tool automatically adds new participants to your website email groups.
- Links to your home page are added to those emails sent from the Online Email Tool; donors and participants don’t have to search for your event homepage or remember a web address.
- Messages deliver current and consistent cancer information and mission delivery.
ACS Privacy Policy

The American Cancer Society respects constituents’ privacy and allows individuals to restrict internal and external sharing of personal information. The Society recognizes that a constituent may wish to limit the ways in which the American Cancer Society contact them and, therefore, offer the following options:

1. Do not contact me by telephone.
2. Do not contact me by postal mail.
3. Do not contact me by email.
4. Do not share my contact information with other non-profit organizations.
5. Do not contact me with fundraising requests supporting the American Cancer Society.
6. Limit your fundraising appeals to semiannual solicitations only.
7. Do not contact me or share my information with anyone.

For more information on how to inform the American Cancer Society of any desired restrictions, please click on the following opt out link: [http://www.cancer.org/docroot/SU/content/SU_1_4_Opt_Out_Form.asp](http://www.cancer.org/docroot/SU/content/SU_1_4_Opt_Out_Form.asp)

If a constituent contacts the American Cancer Society with an opt-out request, all reasonable efforts will be taken to ensure that the individual will not receive any of the selected communications in the future. Updating communication preferences can be done at any time.

If a constituent opts back into a specific service, s/he will receive communication in that manner, regardless of the overall opt out selections. These services may include newsletter subscriptions or email communication by asking a question using “Contact Us.”

Reference Link: [http://www.cancer.org/docroot/SU/content/SU_1_4_Privacy_Statement.asp?sitearea=SU](http://www.cancer.org/docroot/SU/content/SU_1_4_Privacy_Statement.asp?sitearea=SU)

The CAN-SPAM Act: Requirements for Emailers

The CAN-SPAM Act of 2003 (Controlling the Assault of Non-Solicited Pornography and Marketing Act) establishes requirements for those who send commercial email, spells out penalties for spammers and companies whose products are advertised in spam if they violate the law, and gives consumers the right to ask emailers to stop spamming them.

The law, which became effective January 1, 2004, covers email whose primary purpose is advertising or promoting a commercial product or service, including content on a website. A "transactional or relationship message" – email that facilitates an agreed-upon transaction or updates a customer in an existing business relationship – may not contain false or misleading routing information, but otherwise is exempt from most provisions of the CAN-SPAM Act.

The Federal Trade Commission (FTC), the nation’s consumer protection agency, is authorized to enforce the CAN-SPAM Act. CAN-SPAM also gives the Department of Justice (DOJ) the authority to enforce its criminal sanctions. Other federal and state agencies can enforce the law against organizations under their jurisdiction, and companies that provide Internet access may sue violators, as well.

What the Law Requires

The CAN-SPAM law requires that American Cancer Society emails give recipients an opt-out method. The Online Manager must provide a return email address or another Internet-based response mechanism that allows a recipient to ask not to be sent future email messages to that email address; those requests must be honored. A "menu" of choices may be created to allow a recipient to opt out of certain types of messages, but the option to end any commercial messages from the sender must be included.
Any opt-out mechanism offered must be able to process opt-out requests for at least 30 days after the sent commercial email. The law gives Online Managers 10 business days to stop sending email to the requestor’s email address. Another entity cannot send emails to that address. Finally, it’s illegal to sell or transfer the email addresses of people who choose not to receive the organization’s email, even in the form of a mailing list, unless transferring the addresses so another entity can comply with the law.


Best Practices

The following information will discuss best practices when composing additional local email messages.

Send emails to the committee, team captains and members throughout the year.

- Include a link to the homepage so participants can visit the site and check out new information, including documents and photos.
- Include reminders for important dates and activities at the bottom of each coaching message (rather than send a message with just date/activity info).
- Use the email campaign to award and recognize great fundraising or other accomplishments.
- When the event is over, update your webpage with a new photo and results. Send a thank you email to all of your supporters, which will include a link to your updated page. Thank those who gave and tell those who didn’t give that it is not too late.

Subject Lines

- Keep it Simple! Use 5 words or less. The subject line should not exceed 35 characters.
- Avoid words that prompt recipients to hit the delete key as soon as they read the subject line. Words like “free” and “save,” using the Personalization option or ALL CAPITAL LETTERS makes your message looks like “spam.”
- Be concise and have a clear call to action (i.e., Register your team, Join as a survivor, Spread the word, Volunteer, Donate, Sponsor, etc.). Tell them exactly what you want them to do. If you are asking them to register, say that in the Subject Line. If you need them to donate, put that in the subject line. Industry studies indicate that putting a directive in the subject line will raise the return you were looking for.

Body Content

- Keep it short and sweet. Remember people don’t read long and detailed emails. Put those details on your More Event Information or Fundraisers & Activities page, and link to them in your email.
- Limit body copy to 250 words, maximum.
- Use the recipient’s first name. Personalization increases response rates.
- Do not use ALL CAPS. It is considered rude and is the equivalent of “shouting” on the Internet.
- Grab the readers’ attention so they will want to click the link to your Web page.
- Ask one thing at a time and then let them know what they can do next – this should be part of each email. For example, there is not always an ask for money but if your event is following the timeline then you may want to add things such as letting them know you are looking for day of event volunteers.
- The tone of the email should be emotional and factual. Tell a clear ACS Story in small chunk. Share a little part of the story each time in the emails.
- Make the Call to Action urgent! Make it personal from a Volunteer Committee member (in the signature line).
- Use the email templates that are already in the Coaching Email section of your Event Management Center. These are great messages that have been created for you with all of the above tips in mind.

Create content based on different audiences.

- Create different email messages for Youth audiences. Work with your youth volunteer to craft the email. They can write a message that will appeal to college or high school students to help get them to respond.

If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.
• Develop messages for Survivors. This is your chance to inform survivors of other ACS volunteer activities throughout the year. Inform your survivors of survivorship activities before and during the walk.

**Highlight where the money goes!**

• Use coaching emails to communicate the research and patient programs and services offered by the American Cancer Society.
• Use data and information in combination with local stories that highlights how the dollars raised by the event are making a difference in their community

**Proofreading**

• Check spelling and grammar. You want your message to appear thoughtful and reasoned.
• Always, always, always preview your message.
• Send a review email to your event chair, staff partner, English teacher, copy writer, newspaper editor, friend, or loved one. Another pair of eyes is critical.
• Remember, you can’t take back an email once it’s sent. Be sure the links work and there are no errors in dates or typos.

**Scheduling**

• Use the Email Timeline to schedule your messages, make sure there are no pre-scheduled centralized emails or National communications set to go at the same time.
• Send emails between Tuesday and Thursday to get the best results.
• Send follow-up emails. Don’t assume a person doesn’t want to give because they don’t act after your first email. Everyone needs reminding!

**Tips for Reducing Email Spam Risk**

While there is no 100% guarantee that e-mail messages sent through the EMC will not be identified as spam, there are some simple rules to follow to reduce the likelihood.

• Avoid punctuation in the subject line. Question marks, exclamation points, quotation marks, and even apostrophes can be red flags to spam filters. And, by all means avoid multiple punctuation marks!!!!!!!
• Avoid a subject line that would cause someone to not open the e-mail, but instead report as spam. (“You have won a prize!”, “You could be a winner!”,”Good Luck”, “It’s a Party!” etc.)
• Avoid mentioning body parts in the subject line. (Examples: Breast, Prostate, Skin, etc.)
• Do not include images in the e-mail (other than those that are part of the stationery).
• Do not use excessive HTML formatting in the body of your email (Example: Multiple text colors, fonts and sizes)
• Link to newsletters, image files, etc. that are posted on your website, rather than embedding these files in an e-mail.
• Avoid email appending. (Example: If a staff partner pulled a list from Siebel or EMT of constituents who do not have e-mail addresses on file, and then purchased a list of e-mail addresses from an outside source, then compared the two lists and filled in the blanks, then that would constitute e-mail appending) This is widely regarded as spamming by the email industry.
• Send emails to those constituents have not “opted-out” and respect the request of those who have. Recipient complaints are the single greatest cause of delivery barriers.
• Provide an “opt-out” or “unsubscribe” option on each e-mail. This allows the recipient to control their preferences and to be less likely to file a formal complaint.
• Keep your e-mail lists clean by removing bad email addresses.
Appendix D: Email Filtering

You can use Participant and Team filters to target your Engagement emails to a specific audience of current event participants, based on team captain status, dollars raised or emails sent!

**Participant Filters:**

As you are working through the delivery setup of your engagement message, step 3 gives you the opportunity to select filters based on the participant’s registration:

1. **Previous Event Participation:** Filter the recipients of the email based on whether they participated in the previous event or not.
2. **Online/Offline Registration:** Filter the recipients of the email based on how they registered – online or offline.
3. **Date Range:** Filter the recipients of the email based on the date they registered.

Click NEXT to apply your filters.

Looking to further refine your email audience? Click Configure Additional Filters under Related Actions.

- **Donations Received:** Filter the recipients based on the number of donations received or the amount the participant has raised as of the email delivery date.
  i. You can also filter on whether a participant has made a self-donation or not (participant must have been logged in at the time of making the self-donation in order for them to filter correctly).

- **Participant Emails:** Filter the recipients
based on the number of emails they have sent from their dashboard!

c. **Unconfirmed Gifts**: Filter the recipients based on the number of outstanding unconfirmed gifts that the participant has in their Gift History

Click **FINISH** to apply your participant filters.

**Team Filters**

As you are working through the delivery setup of your engagement message, step 4 gives you the opportunity to select filters based on the recipients’ team information:

1. **Team Membership Filter**: Filter the recipients of the email by team captains, team members, or individual walkers.

2. **Company Affiliation Filter**: Filter the email list further by the participants’ corporate affiliation.

Click **NEXT** to apply your filters.

Looking to further refine your email audience? Click **Configure Additional Filters** under Related Actions.

*If you have any questions, please open a support ticket at helpme.cancer.org or reach out to your ACS staff partner.*
a. **Donations Received:** Filter the recipients based on the number of donations received or the amount the participant has raised as of the email delivery date.
   
   i. You can also filter on whether a participant has made a self-donation or not (participant must have been logged in at the time of making the self-donation in order for them to filter correctly).

b. **Participant Emails:** Filter the recipients based on the number of emails they have sent from their dashboard!

c. **Unconfirmed Gifts:** Filter the recipients based on the number of outstanding unconfirmed gifts that the participant has in their Gift History

Click **FINISH** to apply your filters.
Appendix E: Event Management Center Report Guide

Please note there may be times when information added to the websites is not reflected within the reports as expected. If you notice information is still missing 72 hours after it has been entered, please open a help ticket.

NOTE: If at any time you need website performance information that is NOT provided with in the available EMC reports, please complete a report request form using this link and the Info Delivery team will assist with getting the information you need.

01 Event Snap Shot Report
An event snapshot with overall event totals for online & offline confirmed gifts, registration fees, number of teams and participants.

02 Team Summary Report
Includes team creation date, team captain contact information, company affiliation, number of participants, and fundraising totals.

03 Participant Report
Includes contact information, shirt size, team affiliation, fundraising totals, relationship to cancer, and more (for all registered participants).

04 Participant Emails Sent (Date Range Report)
Includes the number of emails sent by each participant within a given time period. (Intended to help determine a winner in time-frame email challenges)

05 Online Donation Report with adjustable date range
Online donations within a date range. Gift times are based in CST.

06 Donation Report
Report on ALL event gifts (online and offline) including transaction date, donation amount, donor last name and email, and soft credit type. This report contains sensitive information and should not be shared with anyone who is not staff of the event.

09 Coaching Email performance
Results on coaching Email by message. Includes click through rates and number of emails sent.
Appendix F: FAQs about the Online Tool

Event Center

The date/location/staff of our event has changed, how can I update it on the website?
You will need to follow the formal process to submit the changes so they can be made in all databases.

1. Visit helpme.cancer.org
2. On the Home screen, under the ‘Online Event Support’ section, select Update an Existing Event
3. A new page will open, taking you to the Event Change Request Form
4. Please be thorough when completing this form to ensure all your event details are accurate

See Appendix B for more information on submitting different event change requests.

Event Emails

How can I remove email addresses from groups in my event?

1. Log into your Event Management Center, and click Event Emails from the top Navigation Bar
2. Under related actions, select Manage Email Groups
3. Select the group the participant you wish to remove is a member of, and click manage next to the group name
4. Find the participant in the group and select remove under the actions column next to his/her name
5. You might have to search multiple groups if that participant was involved for multiple years or in different ways

Customer Service

Note: Changing the soft credit of a donation or moving/deleting registration will only be reflected on the website. The change will not flow to other American Cancer Society databases (Siebel, EMT). To have this change made in the other ACS systems, please open a ticket at helpme.cancer.org or reach out to your ACS staff partner.

A donation was accidentally credited to the wrong team/participant/level, how can I change that?

1. Log in to your Event Manager Center, and click Customer Service from the top Navigation Bar
2. Under Related Actions (left hand side), click Manage Teams (if the donation is at the team level and needs to be moved), or click Manage Participants (if the donation is at the participant level and needs to be moved). If you are unsure where the donation is currently credited, first search donations to find the information you are looking for.
3. Find your team/participant in the list provided or through the search feature.
4. Once you’ve found your team/participant, click Manage.
5. Scroll to the bottom of the page and you’ll see the Gift History section.
6. To move the credit of a donation, click Change Soft Credit beside the gift record:
   a. Step 1 Select Type: Select the New Soft Credit Recipient. Choose who should receive the soft credit for this gift; select whether you’d like to credit this gift to another TeamRaiser Participant or TeamRaiser Team by clicking the appropriate radio button. Then select Search For Recipient. Search the corresponding list. Click Search to find the participant or team.
   b. Step 2 Search Criteria: enter at least one search term and click Next
   c. Step 3 Select Destinations: Find in the entity you would like the donation credited to in your search results. Click Select next to the person or team to whom you are reassigning credit for the donation.
   d. Step 4 Confirm Changes: Review the information of the change before confirming. If it is incorrect, click on any of the previous steps in the Process Navigator on the left side of the page to make the necessary changes.
7. If it is correct, click Finish.
How do I delete a team member?

1. Log into your Event Management Center
2. Click Customer Service from the top Navigation Bar
3. Under Related Actions (left hand side), click Manage Participants
4. Find your participant's record you would like to delete in the list or through the search feature
5. Once you've found your participant, click Manage Participant beside his/her name
6. Under Related Actions (left hand side) and click Remove from all teams
7. Under Related Actions (left hand side), select Inactive. Follow steps to make the account inactive.
8. Once a participant in inactive, you will find the Delete Registration link under Related Actions. Click Delete
   Registration to remove the participant entirely from the site.

How do I delete a team?

Before deleting a team from the website, you will have to delete all the members on that team:

1. Log into your Event Management Center
2. Click Customer Service from the top Navigation Bar
3. Under Related Actions (left hand side), click Manage Teams
4. In the list provided or through the search function, find the team you would like to delete
5. Click Manage beside the team account
6. Select the members tab
7. Remove each participant by selecting manage next to their name and
   a. Remove from all teams
   b. Make inactive
   c. Delete registration under related actions on the left.
8. This will remove the participants from the entire event site. Once you have removed all participants, and finally
   the team captain, the team will no longer exist.

Reports

I ran a report, where is it?

The more data you have to collect in a report, the longer the report will take to generate. Try clicking the refresh button
every few minutes and make sure you are in the Reports Results tab