COMMUNITY FUNDRAISING EVENTS ONLINE: THE PARTICIPANT EXPERIENCE
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Updated: September 2015
If you have any questions or concerns, please contact your local staff partner or call the American Cancer Society at 1.800.227.2345.
Chapter 1: Register Online

1. Society Account
   - Creating a New Account
   - Logging in to Your Existing Society Account
2. Start an Online Team - Team Captains
3. Join an Online Team - Team Members
4. Join as an Individual

Society Account

The American Cancer Society account login process has been upgraded to a new enhanced single sign-on. This update ensures proper security and a consistent experience across all American Cancer Society applications.

The main benefits are –
- Now you can login using your preferred social account login credentials or with your email address
- You will be recognized on all of our event sites, so there will be no need for multiple user names and passwords
- Enhanced account security across all Society applications

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

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

1. From your internet browser, type your event’s friendly URL and your event website will appear. If you do not know your event’s friendly URL, you can search for your event through cancer.org.

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

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If you have any trouble logging in, or creating your account, please call 877-957-7848

If you have any questions or concerns, please contact your local staff partner or call the American Cancer Society at 1.800.227.2345.
3. To begin the process of creating your new Society account, click the blue **Create an Account** button.

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 you need additional assistance creating your new Society Account, feel free to call our web site support desk at 877-957-7848. We’re always ready to assist you with any question you might have.
Note: See Chapter 3 for information on managing your Society Account.

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 (this includes 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.

After this upgrade, you won’t have to remember multiple email addresses if you participate in a variety of American Cancer Society events. Once you’ve updated your account and created a new password, you’ll be able to access any of our event or program websites using your newly created American Cancer Society account login information.

1. From your internet browser, type your event’s friendly URL and your event website will appear. If you do not know your event’s friendly URL, you can search for your event through cancer.org.

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

Updated: September 2015
3. Use one of the Log In options to access your account.
   a. If you were already registered before November 19, 2014, you will be unable to log into your event site until you upgrade to a new Society Account. (Don’t worry, your dashboard will still function and receive donations in the meantime.)
   b. If you need additional assistance creating your new Society Account, feel free to call our web site support desk at 877-957-7848. We’re always ready to assist you with any question you might have.

Start an Online Team – Team Captains

As a team captain, you may begin your team building and fundraising as soon as you set up your team’s webpage. Team leaders serve as role models for online fundraising and help build excitement for the event. Please use these step-by-step instructions to register your team online.

Good luck and have fun!

1. From your internet browser, type your event’s friendly URL and your event website will appear. If you do not know your event’s friendly URL, you can search for your event through cancer.org.

Updated: September 2015

If you have any trouble logging in, or creating your account, please call 877-957-7848

If you have any questions or concerns, please contact your local staff partner or call the American Cancer Society at 1.800.227.2345.
2. Click on the **Sign Up** button.

![Sign Up Button](image.png)

3. You will be asked to create / log in to your Society Account (see [previous section](#) for more info on Society Account)
   a. **Note:** If you just followed the process in the previous section to create / log in to your Society Account, you will still be logged in to this record and can continue with the registration process.

![Log In Screen](image.png)

4. Once you have logged into the website, click the **Start your Team** link.

![Start your team today](image.png)

5. Enter information about the team you are creating before clicking **Next Step**:
   - **Name your team**
   - **Select your team fundraising goal ($)**
   - **Select if your team is affiliated with a company or organization**

Updated: September 2015
6. Select your participation types

7. Personalize your individual **Fundraising Goal**.

8. “**You can kick-off your fundraising by making a donation now**”. Once you confirm to make a donation during the registration process, select a gift value or enter a different amount. If you would prefer not to make a donation during your registration, select “**I prefer not to make a donation at this time**.”

8. Click **Next Step**.

9. Complete the **Registration Form** with your personal information. Remember the * symbol means the field is required.

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

   a. **Contact information**
   b. **Email preferences**
   c. Answer the **additional registration questions** regarding your relationship with cancer and team information.

10. Read the Waiver and click the box beside “**I agree to the terms and conditions**” before clicking **Next Step**.

11. Review the contact and registration information you provided before clicking **Complete Registration**.

Updated: September 2015
a. If your information is not correct, click the **Edit** button to make the necessary changes.

12. **Your registration is complete!** After completing the registration process, you will receive a confirmation message and access to the Dashboard where you may start building support to fight cancer.

![Dashboard](image)

Join an Online Team – Team Members

Thank you for becoming a team member. Please use these step-by-step instructions to join your team online.

By signing up online, you have access to a number of tools, such as a personal webpage to share your story, a message center to send out emails to your friends and family asking for their support, and an easy way to track your progress.

1. From your internet browser, type your event’s friendly URL and your event website will appear. If you do not know your event’s friendly URL, you can search for your event through [cancer.org](http://cancer.org).

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)
   a. **Note:** If you just followed the process in the previous section to create / log in to your Society Account, you will still be logged in to this record and can continue with the registration process.

4. Once you have logged into the website, click the **Join a Team** link.

   ![Join a Team button](image)

5. To find the team you wish to join, type in the name and click the Search for a Team button. All the teams that have registered on the website will appear in a list below. Click the “Join” button to pick your team.
6. Select your participation type

7. Personalize your individual **Fundraising Goal**.

8. “**You can kick-off your fundraising by making a donation now**”. Once you confirm to make a donation during the registration process, select a gift value or enter a different amount. If you would prefer not to make a donation during your registration, select “**I prefer not to make a donation at this time**.”

9. Click **Next Step**.

10. Complete the **Registration Form** with your personal information. Remember the * symbol means the field is required.

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

    a. **Contact information**

Updated: September 2015
b. Email preferences

c. Answer the additional registration questions regarding your relationship with cancer and team information.

11. Read the Waiver and click the box beside “I agree to the terms and conditions” before clicking Next Step.

12. Review the contact and registration information you provided before clicking Complete Registration.
   b. If your information is not correct, click the Edit button to make the necessary changes.

13. Your registration is complete! After completing the registration process, you will receive a confirmation message and access to the Dashboard where you may start building support to fight cancer.

Join as an Individual

Thank you for becoming an individual participant. Refer to the step-by-step instructions starting with Step 6 (under Join A Team instructions) to register online.

By signing up online as an individual participant you will also have access to a number of tools, such as a personal webpage to share your story, a message center to send out emails to your friends and family asking for their support, and an easy way to track your progress.

Updated: September 2015
Chapter 2: Online Fundraising Tools – Your Dashboard

- Access Your Dashboard
- Dashboard Overview
  - My Dashboard Tab
  - My Team Tab
  - My Event Tab

As an online participant, you have a number of tools available to make your fundraising and team building experience easy and fun. The Dashboard provides you with resources to share your story, ask for support from your family and friends, and track your team and event progress.

This section of the manual will provide you with instructions on how to access the Dashboard as well as give you an overview of the tools available in each area.

Enjoy these tools and have fun!

Access Your Dashboard

1. From your internet browser, type your event’s friendly URL and your event website will appear. If you do not know your event’s friendly URL, you can search for your event through cancer.org.

2. Enter your Username and Password in the login fields in the top right corner. Follow the prompts to login or create a new account.

3. Forgot your login? No problem! You can also have your password e-mailed to you by clicking the Forgot Username/Password link in the login box. Simply enter your email address to have it sent to you!

Note: If this is your first time logging in since November 2014, you may also need to migrate your participation record to the new Society Account. Learn more about the new Society Account in Chapter 1.

Updated: September 2015
This is a screen shot of your Community Fundraising event Dashboard homepage!

An overview of each tab of the Dashboard is listed below. Please see the following sections of the dashboard guide for a detailed explanation of the fundraising tools available to you.

- **Get Started**: Tell everyone and your participation in our event.
- **Personalize Your Page**: Add a personal photo and/or video. Share your motivation for participating.
- **Go Fundraising**: Send fundraising emails. Download mobile and Facebook apps.
- **Motivate your team to make a difference! Post fundraising tips, encouragement, and other announcements for your team. Pool an Announcement for your team.
- **My Progress**: See how much you have raised and how much more you need to raise.
- **My Fundraising Tools**: Use the tools to reach your fundraising goal.
- **Thank You For Your Support**: You can see how much you have raised and how much more you need to raise.
- **My Donations**: Make a donation or enter a cash/check donation.

For more information, please contact us at 1.800.227.2246 or visit Online Help.
Dashboard Overview

1. **My Dashboard Tab** - you can perform the following functions:
   A. Send an email to your family and friends, asking for their support
   B. View and edit your personal page
   C. Send an email to your family and friends, asking for their support
   D. View and edit your fundraising efforts towards your goal
   E. Use Facebook to extend your request for support to your social media friends
   F. Get fundraising ideas
   G. Donate to yourself
   H. View your online donation history and send Thank Yous

I. Stay up to date with the latest event announcements
K. Access event information
2. My Team Tab - from the My Team tab you can perform the following functions:
   A. Update the team name/team captains (Team Leader only)
   B. View your team fundraising efforts towards the collective goal
   C. Edit the team fundraising goal (Team Leader Only)
   D. View the team page / Edit the team page (Edit function available to Team Leader only)
   E. Send messages inviting friends, family and coworkers to join your team, or send fundraising tips to your team members
   F. View your team’s recent online donation history
   G. See a roster of your teammates, including amount raised

Updated: September 2015
3. **My Event Tab** - from the My Event tab of the Dashboard, you can keep up to date with how your Community Fundraising event is building towards a great event:
   A. View your event fundraising efforts towards the collective goal
   B. See event photos from a Flickr stream
   C. View a list of all participants online
   D. View a list of all team registered online
   E. View a list of all companies registered online
   F. See details on top event sponsors
Chapter 3: Managing Your Online Information

- Update Your Online Profile
- Update Your Login Preferences
- Update Your Email Preferences
- Trouble accessing your Dashboard? Try these steps.

After you register online to participate in Community Fundraising event, you can manage and update your profile – including your name, contact information, username/password, and email preferences.

Update Your Online Profile

1. Using your username and password, log into your Society Account (see Chapter 1 for more information on your Society Account). You will be automatically taken to your Dashboard.

2. In the upper right-hand corner of the screen, click on the My Society Account link next to your name.

3. 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. Using your username and password, log into your Society Account (see Chapter 1 for more information on your Society Account). You will be automatically taken to your Dashboard.

2. In the upper right-hand corner of the screen, click on the My Society Account link next to your name.

3. Scroll down to the Login Preferences section.

4. 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.

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

Updated: September 2015
Update your Email Preferences

1. Using your username and password, log into your Society Account (see Chapter 1 for more information on your Society Account). You will be automatically taken to your Dashboard.

2. In the upper right-hand corner of the screen, click on the My Society Account link next to your name.

3. Scroll down to the My Contact Preferences section.

4. 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 Making Strides experience from each email, with photos and links.
Trouble accessing your Dashboard? Try these steps.

Clear your Browser’s Cache
Most browsers have what we call "caching issues," which basically means your computer is remembering something you don't want it to. This is common when you frequently use the back button on a site, and can also happen to if you're using a shared computer. To clear your cache, follow the instructions below based on which browser you're using:

FireFox:
- Go to 'Tools'
- Click 'Options'
- Go to the 'Privacy' tab
- In the center of the page, click the 'Clear your recent history' link
- Go to the 'Advanced' tab, and click on "Network"
- Under "Offline Storage", click 'Clear now'
- Click OK.

Internet Explorer:
- Go to 'Tools'
- Click 'Internet Options'
- In the General tab, click "Delete" under the 'Browsing history' section
- Check all desired options, then click 'Delete'
- Click OK.

Google Chrome:
- From the menu, select 'Tools'
- Select Clear browsing data
- In the dialog that appears, select the checkboxes for the types of information that you want to remove
- Use the menu at the top to select the amount of data that you want to delete. Select beginning of time to delete everything
- Click Clear browsing data

Please note that clearing your cache may take several minutes, during which time your computer may appear to freeze or the browser may appear to stop responding/lock up. Please be patient and allow this process to finish. If you continue to experience problems after clearing your cache, completely quit the browser (close all open windows, regardless of what site is open in that window), then reopen the browser. This will clear session data, which can also cause caching issues.

Note: If this is your first time logging in since November 2014, you may also need to migrate your participation record to the new Society Account. Learn more about the new Society Account in Chapter 1. If you need additional assistance creating or accessing your new Society Account, feel free to call our web site support desk at 877-957-7848. We’re always ready to assist you with any question you might have.
Chapter 4: Managing Your Personal Community Fundraising Website

- Update your fundraising goal
- Customize your Personal Page
  - Edit your Personal Page
  - Upload a photo or video to your Personal Page
- Create a personal URL

As an online participant, you have a personal webpage that allows you to share your reason to get involved while also recognizing your fundraising success and donors. This section of the manual will provide you with instructions on how to view and edit your personal webpage.

**Update Your Fundraising Goal**

You can set a fundraising goal during the registration process; this goal may be updated and increased as you reach fundraising success.

1. Using your username and password, log into your **Dashboard**.
2. From the My Dashboard tab, click **Edit Goal** in the **My Progress** box (top left hand side).

3. Enter a new individual fundraising goal before clicking **Submit**.
Customize Your Personal Page

As an online participant, you have access to a personal fundraising page that can be customized to reflect your reason for getting involved and can be used to collect lifesaving donations.

Edit Your Personal Page

The Dashboard offers you the opportunity to edit and update your personal fundraising page. By sharing your reason for participating and photos or video, you can create a compelling webpage for your team building and fundraising efforts.

1. Using your username and password, log into your Dashboard.

2. From the My Dashboard tab, click the Personalize Your Page link under the Get Started header (top of the page).

3. Your personal page will appear with several links so that you may make the appropriate edits.

4. Edit the title of the page.
   a. Beside the header of the page, click Edit My Page Name.
   b. Enter a new page title and click Save.

5. Edit your story:
   a. Beside the message of the page, click Edit My Story.
   b. Enter new content to your page before clicking Save.
      i. You can use the toolbar to format the text in your story
      ii. Do not copy and paste content from an external source, as hidden text formatting may affect the overall page display.
Upload a photo or video to your Personal Page

1. To add a photo or video to your personal page, click the **Upload Photos/video** button beside the photo area.

   ![Upload Photo/Video Button]

   ![Photo Example]

   a. **Photo** – Insert up to 2 images to display on your personal page by uploading a file that contains a digital photograph. You may upload photos up to 4MB and 300x400 pixels.

   - **Before you upload your image file, you may want to open it in your favorite graphics application and resize or crop the image to ensure the best fit, especially if the photo is quite large. Here is an easy web-based photo resizer you can use to get your pictures down to the right size:**


   i. **Browse** – Click the browse button 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.

   b. **Video** – Insert a video to display on your personal page by uploading a URL link that contains the video clip.

   i. Enter the URL to a video to see the clip embedded on your personal page and
   ii. Click **Save Changes** to see your new video reflected on the personal page.

Updated: September 2015
Create a Personal URL

1. Using your username and password, log into your Dashboard.

2. From the My Dashboard tab, click the Personalize Your Page link under the Get Started header (top of the page).

![Personalize Your Page link highlighted]

3. Your personal page will appear with several links so that you may make the appropriate edits.

4. At the top of the page, find the My URL information.

![My URL information]

5. Click Edit My URL to create a personal page URL to your webpage. Enter in the end, personal section of the URL. Example for personal page URL: http://main.acsevents.org/goto/SallyRides

6. Click Save. Once a personal URL has been created, the participant may add it to their email signature, post it on the Social Media sites, and provide a direct link for potential donors on paper materials.
Chapter 5: Emailing From Your Dashboard

- Manage Your Address Book
  - Access Your Address Book
  - Import Contacts into Your Dashboard Address Book
    - Import Contacts from your Personal Email Provider
    - Import Contacts from a CSV File
  - Manually Add Contacts to Your Address Book
  - Edit a Contact
  - Delete a Contact
  - Create an Email Group
- Manage & Send Emails
  - Edit & Send a Message
  - Track Email Contacts

Sending emails from the Dashboard is an easy way to spread the American Cancer Society’s mission to end cancer and secure lifesaving funds.

This section of the online manual will show how easy it is to send email messages and follow up with your friends, family, and colleagues as you generate support for the American Cancer Society.

Managing Your Address Book

As an online participant, you can manage an Address Book in the Dashboard, making it easy to send emails to your friends, family, and co-workers asking for their support. After creating and managing your Address Book, with just a few clicks, you can select and send emails to them without typing their email addresses repeatedly.

**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.

Access Your Address Book

1. Using your username and password, log into your **Dashboard**.

2. From any section of the Dashboard, click the **My Contacts** link found on the right hand side of the page.
3. Your address book will appear and contain any contacts you uploaded, manually entered, or previously emailed.
   a. If you registered as a returning participant, all contacts that you previously uploaded to or emailed from the Dashboard will automatically be in your current Address Book.

   ![Image of My Contacts interface]

**Import Contacts into Your Dashboard Address Book**

Before sending an email to your family and friends asking for support, take a moment to upload your contacts into the Dashboard. This will make emailing even easier; with just a few clicks, you can select and send emails to them without typing their email addresses repeatedly.

**Import Contacts from your Personal Email Provider**

1. Using your username and password, log into your Dashboard.

2. From any section of the Dashboard, click the **My Contacts** link found on the right hand side of the page.

![Image of My Contacts link]
3. At the top of the Contacts overlay, click the Import Contacts link.

4. Choose the email service provider where your contacts are stored by clicking the button beside the source. Choose Next.

If you use an email service other than Gmail or Yahoo!, please export your current address book as a CSV file. Once the CSV file is created, you may upload them into the Dashboard. More directions about importing a CSV file are available in the following section.

5. Enter the username and password for your email program and click Sign In.

6. Allow the website access to your email contacts by clicking Grant Access.

7. Read the consent agreement to allow the Dashboard to access your online address book. Click Next.

Updated: September 2015
8. Determine if you wish to import all, or only some, of your email addresses into the Dashboard by checking the appropriate radio button.

   a. If not all contacts are selected, individually choose which email addresses are to be uploaded by checking the box besides each record.
   b. Click Next.

9. Review the contacts you have selected to add to the Dashboard Address Book before clicking Finish.
10. Your personal email Address Book has been successfully uploaded into the Dashboard to help you communicate and follow up with your contacts as they support your efforts to fight cancer.

**Import Contacts from a CSV File**

1. Using your username and password, log into your **Dashboard**.

2. From any section of the Dashboard, click the **My Contacts** link found on the right hand side of the page.

3. At the top of the **Contacts** overlay, click the **Import Contacts** link.
4. Choose to import your email addresses as a CSV file. Choose Next.

   ![Import Contacts](image)

   a. Before uploading your contact file, ensure that the document is in the proper format and saved as a CSV or comma delimited option document as exampled below.

<table>
<thead>
<tr>
<th>First</th>
<th>Last</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob</td>
<td>Smith</td>
<td><a href="mailto:bob.smith@email.com">bob.smith@email.com</a></td>
</tr>
</tbody>
</table>

   b. [More instructions regarding formatting the CSV email address file can be found here](#)

5. Browse for the CSV file on your computer before clicking Next.

   ![File-based Import for...](image)

6. Review the preview of the addresses that have been uploaded into the Dashboard. Click Next.

   ![Import Contacts](image)

Updated: September 2015
7. Determine if you wish to import all, or only some, of your email addresses into the Dashboard by checking the appropriate radio button.

![Import Contacts]

   a. If not all contacts are selected, individually choose which email addresses are to be uploaded by checking the box besides each record.
   b. Click **Next**.

8. Review the contacts you have selected to add to the Dashboard Address Book before clicking **Finish**.

![Successfully Saved Contacts]

9. Your personal email Address Book has been successfully uploaded into the Dashboard to help you communicate and follow up with your contacts as they support your efforts to fight cancer.

**Manually Add Contacts to Your Address Book**

1. Using your username and password, log into your **Dashboard**.

Updated: September 2015
2. From any section of the Dashboard, click the **My Contacts** link found on the right hand side of the page.

![My Contacts link](image)

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

4. To manually add a new contact, simply click on the **Add a Contact** link in the upper right-hand corner.

![Add a Contact](image)

5. Add the new contact’s First Name, Last Name and Email and click **Add a Contact**.
Edit a Contact in your Address Book

1. Using your username and password, log into your Dashboard.

2. From any section of the Dashboard, click the My Contacts link found on the right hand side of the page.

3. Your address book will appear and contain any contacts you uploaded, manually entered, or previously emailed.
   a. If you registered as a returning participant, all contacts that you previously uploaded to or emailed from the Dashboard will automatically be in your current Address Book.
4. Simply click on the name of a contact you wish to edit.

5. Update the contact’s information and click **Save**.

![Contact Information Form]

**Delete a Contact in your Address Book**

Please note, some contacts in your address book cannot be deleted. Team members and donors cannot be deleted from your address book.

1. Using your username and password, log into your **Dashboard**.

2. From any section of the Dashboard, click the **My Contacts** link found on the right hand side of the page.

![Dashboard with My Contacts highlighted]

3. The overlay that appears will display email addresses that are currently in your Address Book. **Check the box** beside the contacts’ name you wish to delete.

4. From the Select an action drop down menu, click **Delete contact(s)**.
5. **Confirm** to delete the contact from the Dashboard Address Book.

Create an Email Group

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

1. Using your username and password, log into your **Dashboard**.

2. From any section of the Dashboard, click the **My Contacts** link found on the right hand side of the page.
3. The overlay that appears will display email addresses that are currently in your Address Book. **Check the box** beside the contacts’ name you wish to add to a new email group.

4. From the Select an action drop down menu, click **Add to a new group**.

5. Provide the group with a name and click **Create Group**.

6. Once a group is created and contacts have been tied to the group, you can easily send emails to all group members simply by typing the group name into the email To: field

**Manage and Send E-mails**

The number one reason why people donate to the American Cancer Society is because someone asked. Take advantage of the tools available in the Dashboard to ask your family, friends, and co-workers for support in the fight against cancer.

Using a well-crafted team building or donation request emails can help direct people to your personal page quickly and encourage support. All emails from the Dashboard will automatically link the recipient back to your personal page and team page.

Updated: September 2015
As you begin sending email messages, note that you can use the template emails available, save your own versions, or create a brand new message that speaks best for you.

Start sending emails today and watch your team and fundraising soar!!

**Edit and Send a Message**

1. Using your username and password, log into your **Dashboard**.

2. From any section of the Dashboard, click the **Compose an email** link found on the right hand side of the page.

3. The **Send an Email** overlay will appear.
   a. Your name and your email address will automatically populate as the sender’s address.
   b. 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.
   c. Click **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. Click on the **Select a template** drop down menu to see the suggested messages available (i.e. Thank a Donor) Once you select the template of your choice, the email will appear for you to personalize or send as is

5. Make any changes to the **Subject** and the **Message** text.

6. Click **Preview** to see your email message before you send it.

7. Click **Save as Draft** if you want to save this message for future use.

8. Click **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.

Updated: September 2015
Track Email Contacts

By sorting your Dashboard Address Book, you can easily track people that you’ve sent messages to, who have joined your team, and who have made donations to you. You can also keep track of those needing follow-up or Thank You emails.

1. Using your username and password, log into your Dashboard.

2. From any section of the Dashboard, click the My Contacts link found on the right hand side of the page.

3. Your address book will appear and contain any contacts you uploaded, manually entered, or previously emailed.

4. Review the columns beside each email contact to see the number of emails that you have sent to each individual, the number of emails opened, and if the contact has viewed your page or made a donation.
a. **Check the box** beside any of the contacts that you would like to email based on the information displayed. After selecting the contacts, click **Add Selected to Email**.

5. Use the drop down menu to filter the email contacts by groups.
   a. **Donors**: Sort the list of individuals by those who have made a contribution so that you can be sure to thank them.
   b. **Non-Donors**: Ask for support from those who have not made a gift online.
   c. **Never Emailed**: Be sure to reach out to those who you have not yet emailed.
   d. **Need follow-up**: Send another email to those who need a reminder message

6. You can send emails to the members of a certain group by selecting the individuals within the desired group. Click the box beside the contacts you wish to email and select **Add Selected To Email** to prepare a message, and follow the steps outlined above to compose and send your message.
Chapter 6: Managing Your Fundraising Success

- View Your Online Fundraising Progress
- View a List of Donors

After registering as an online participant, you have great tools available to support your fundraising efforts. The Dashboard can help you manage your gifts and donors while tracking your progress towards your fundraising goals.

View Your Online Progress

1. Using your username and password, log into your Dashboard.

2. From the My Dashboard tab you can perform the following functions:
   a. Track your fundraising progress with the My Progress area.
   b. Edit Personal Fundraising Goal.
   c. View your Donation History.
**View a List of Donors**

1. Using your username and password, log into your **Dashboard**.

2. From the My Dashboard tab you can see a list of all donors who have contributed to your fundraising efforts. Here you may also view any personal messages sent by your supporters and directly connect to the email tool to send a thank you message.
Chapter 7: Tracking Your Team’s Efforts

- View Team’s Progress
- View a List of Team Members
- Share Fundraising Tips with Your Team

The Dashboard allows team members and team captains the ability to monitor their collective efforts to fight cancer. The My Team section page displays a gift summary of donations made to all participants on the team, progress indicators, team gift history, and team member roster. The ‘My Team’ page is only available for Team Captains and Team Members; this page is not available for individuals not associated with a team.

*If you are the team captain, you will see additional links and actions that can be made as you inspire your group to increase their efforts to end cancer. More information is available in the next chapter of the manual.*

View Your Team's Progress

1. Using your username and password, log into your Dashboard.

2. From the **My Team tab**, you can:

   a. Track your team fundraising progress with the **Team Progress** area.
   
   b. See how your team ranks among the other teams participating in your event
   
   c. View your **Team Donation History**.
   
   d. See a full list of team members, plus how much they’ve each raised
View a List of Team Members

1. Using your username and password, log into your Dashboard.

2. From the My Team tab, locate the Team Members section (middle right hand side of the page).
   - a. See a list of all team members plus their fundraising successes and milestone levels.
   - b. View members who have recently joined your team and connect directly with the Dashboard email system to send them a welcome message.
   - c. Team Captain can view and print a team roster by clicking on the View Team Roster link in the top right.

Share Fundraising Ideas with Your Team

1. Using your username and password, log into your Dashboard.

2. From the My Team tab, click the Share a fundraising idea with my team link in the My Team Tools box (right hand side of the page).

3. The Send an Email overlay will appear. At the top of the page, click Select Contacts.
4. Using the drop down menu to filter the email contacts by the **Teammates group**.

5. Click the box beside the contacts you wish to email and select **Add Selected To Email** to prepare a message.
6. A message page will display with your selected individuals automatically listed in the **To:** field. Choose from any Suggested Messages or start crafting your own message from the blank email displayed.
   a. Your name and your email address will automatically populate as the sender’s address.

7. Make any changes to the **Subject** and the **Message** text.

8. Click **Preview** to see your email message before you send it.

9. Click **Save as Draft** if you want to save this message for future use.

10. Click **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.

**Updated: September 2015**
Chapter 8: Online Fundraising Tools – Team Captains Only

- Update Your Team Name
- Change the Team’s Fundraising Goal
- View/Edit Your Team Page
- Create a Team URL
- Send an Email to Your Team Members

Team Captains are the leaders, providing support and guidance to their teammates. The Dashboard provides a number of tools specifically for Team Captains to help lead the group to success.

Enjoy these tools and have fun!

**Update your Team Name**

1. Using your username and password, log into your Dashboard.

2. From the My Team tab, locate the team information at the top of the section. Click Edit beside the team name.

3. Enter the new team name and click Submit to save changes.

![Edit Team Name](image)

**Change your Team Fundraising Goal**

While the team captain may set a group fundraising goal during the registration process, this goal may be updated as you reach fundraising success.

1. Using your username and password, log into your Dashboard.
2. From the My Team tab, click **Edit team goal** in the **Team Progress** box (top left hand side)

3. Enter a new team goal before clicking **Submit**.

![Image of Edit Team Goal dialog box]

**View / Edit Your Team Page**

The Dashboard offers team captains the opportunity to edit and update the team page. By sharing the team’s reason to participate and photos or video, you can create a compelling webpage to help you recruit teammates and donations.

1. Using your username and password, log into your **Dashboard**.

2. From the My Team tab, click the **My Team Page** link in the My Team Tools box (right hand side of the page).

![Image of My Team Page]

3. Your team page will appear with several links so that you may make the appropriate edits.
4. Edit the team’s company affiliation by selecting **Edit Company** under the header of the page before clicking **Save**.
5. Edit your team’s story
   a. Beside the message of the page, click **Edit Our Story**.
   b. Enter new content to your team page before clicking **Save**.
      i. You can use the toolbar to format the text in your Story

![Edit Our Story](image1)

6. To add a photo to your team page click the **Upload photo** button beside the image area.

![Upload photo](image2)

   a. **Photo** – Insert one photo to display on your team page by uploading a file that contains a digital photograph. You can upload photos up to 4MB and 300x400 image size.

   - **Before you upload your image file, you may want to open it in your favorite graphics application and resize or crop the image to ensure the best fit, especially if the photo is quite large. Here is an easy web-based photo resizer you can use to get your pictures down to the right size:**
     http://www.picresize.com/

   i. **Browse** – Click the browse button 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 team page.
Create a Team URL

1. Using your username and password, log into your Dashboard.

2. From the My Team tab, click the My Team Page link in the My Team Tools box (right hand side of the page).

3. Your personal page will appear with several links so that you may make the appropriate edits.

4. At the top of the page, find the My Team URL information.

5. Click Edit Team URL to create a custom page URL to your team webpage. Enter in the end, personal section of the URL. Example for personal page URL: http://main.acsevents.org/goto/TeamAwesome

6. Click Save. Once a team URL has been created, the team captain / team members may add it to their email signature, post it on the Social Media sites, and provide a direct link for potential donors on paper materials.

Updated: September 2015
Post an Announcement for your Team in the Dashboard

Keep your teammates inspired and motivated by posting words of encouragement in their Dashboard. The message will appear on the Dashboard whenever they log into the website.

1. Using your username and password, log into your Dashboard.
2. From the My Dashboard tab, click the Post an announcement link above the My Fundraising Tools box (center of the page).
3. Type the message you would like to share to inspire, motivate, or encourage your online team members. Click Submit to update the message.

4. The message will then appear on your team members’ My Dashboard home page.
Send an Email to Your Team Members

As an online team captain, you can easily send email messages from the Dashboard to your teammates. Provide encouragement, team fundraising opportunities, useful event information, and more with the click of a few buttons!

1. Using your username and password, log into your Dashboard.

2. From the My Team tab, click the Email my team link in the My Team Tools box (right hand side of the page).

3. The Send an Email overlay will appear.
   a. Your name and your email address will automatically populate as the sender’s address.
   b. Your teammates email address will auto-populate into the To: field.

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

5. Make any changes to the Subject and the Message text.

6. Click Preview to see your email message before you send it.

7. Click Save as Draft if you want to save this message for future use.

8. Click Send to deliver this message to your teammates. A confirmation will appear letting you know the message has been sent and giving you an opportunity to continue sending emails.

Updated: September 2015
Chapter 9: Donate Online

- Make an Online Donation
- Print an Offline Donation Form

Make an Online Donation

Thank you for supporting the American Cancer Society with an online donation. Please use the following instructions to help you complete a secure credit card donation to a participant, team, or a specific American Cancer Society event.

Your contribution is helping to create a world with less cancer and more birthdays. Thank you!

1. From your internet browser, type your event’s friendly URL and your event website will appear. If you do not know your event’s friendly URL, you can search for your event through cancer.org

2. Click on the Donate link.

3. Upon clicking the Donate button, you can select who the donation will support: a Team, Participant or the general Event. Click the appropriate link.

4. If selecting to make your donation to a participant or team, a listing of available online participants or teams will appear as your search results.

   Note: If you select to donate to a participant, only those participants who currently have funds raised will appear in the list, however you can use the search function to locate any participants currently registered on the online website.

Updated: September 2015
a. If necessary, use the search function to help to find who you wish to donate to.
b. Click Donate beside the right participant/team.

5. After clicking Donate beside the team/participant, you will be directed to the donation form.
   a. If you had selected to Donate to the Event, you will also be directed to the donation form.
   b. Be sure to check the pink box at the top right corner of the page to ensure your donation is being credited to the appropriate participant, team, and event.

6. Step 1: YOUR GIFT
   a. Select the gift amount or enter a specific donation amount.
   b. Choose how you would like the gift and gift amount to be recognized on the public donor wall.
   c. Write a private note to the person/team that you are supporting.
7. Step 2: **YOUR CONTACT INFORMATION**
   a. Enter your **Contact Information**.
   b. Select / unselect the preferences:
      i. Please remember my contact information
      ii. I would like to receive communications from the American Cancer Society. Please note, not selecting this option will remove you from any important event email notifications.

8. Step 3: **YOUR BILLING INFORMATION**
   a. Enter your **Billing Information** and **credit card** details.

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

**Print an Offline Donation Form**

Thank you for supporting your American Cancer Society event with a cash or check donation.

1. From a Participant’s Page, click on the link **“or mail in your donation by check”** link. An offline donation form will appear for you to print out

2. Complete the form and include it with your donation. Be sure to mail the form to the local American Cancer Society office listed.

3. Don’t forget to send a separate email to the participant to let them know you are sending in a donation to the American Cancer Society.