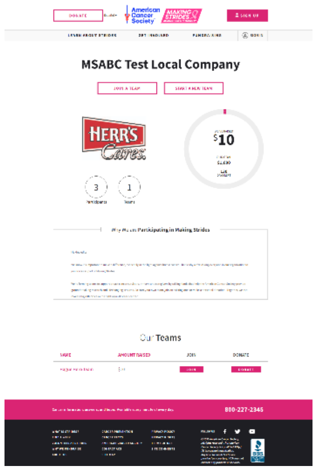
Local Company Page Guide for ACS Staff



This guide will walk through the process of adding and managing local companies to a single P2P event on Blackbaud (RFL, MSABC, Active/Endurance). *Note: Local companies are not an option for MWP events. See additional MWP company options here.* This will create a Company Fundraising Page which can be used to showcase fundraising impact and spark competition on a co-branded landing page.

*If you have a company partnership across **more than one event** within a program (example: 5 RFL events or 3 Making Strides walks), please submit the signed Company Website Request Form to ACS.PartnersAgainstCancer@cancer.org along with logo and page edits to have the page created.*

Quick Links:

Setting Up a Local Company | Affiliate Company Teams | Edit Company Name and Goal | Add Company level gift | Edit Company Page Logo and Story | Email Company Participants | Company Reporting

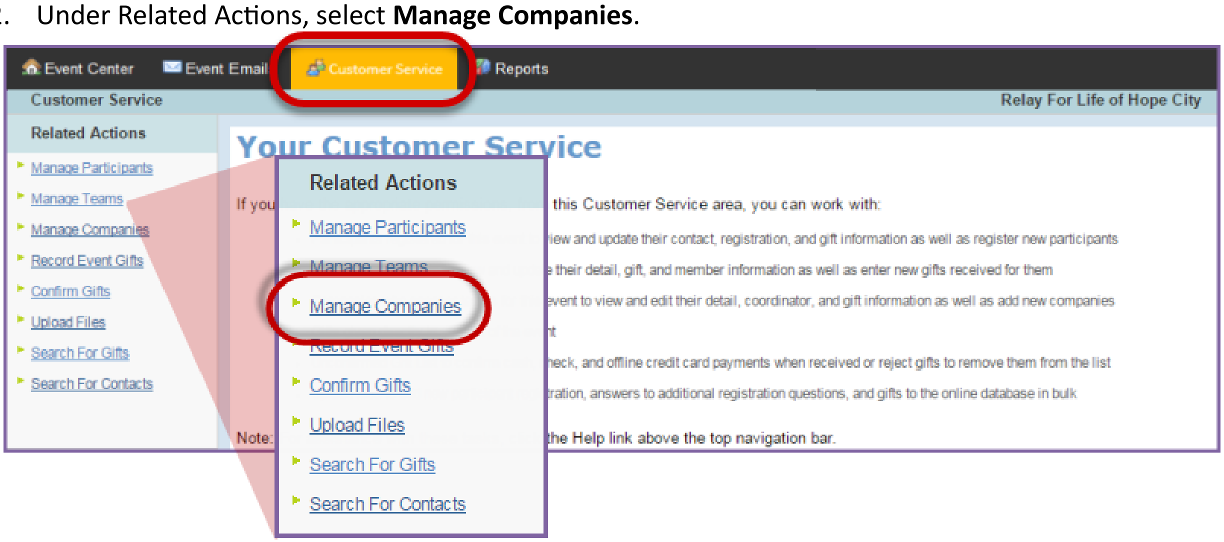
External Resources:

- Join a Making Strides Walk (Company Options on page 2)
- Corporate Landing Page Sell Sheet
- Company Website Request Form (for Companies across more than one event)

Setting up a Local Company

1. From the Event Management Center (EMC), click **Customer Service**.

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



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:

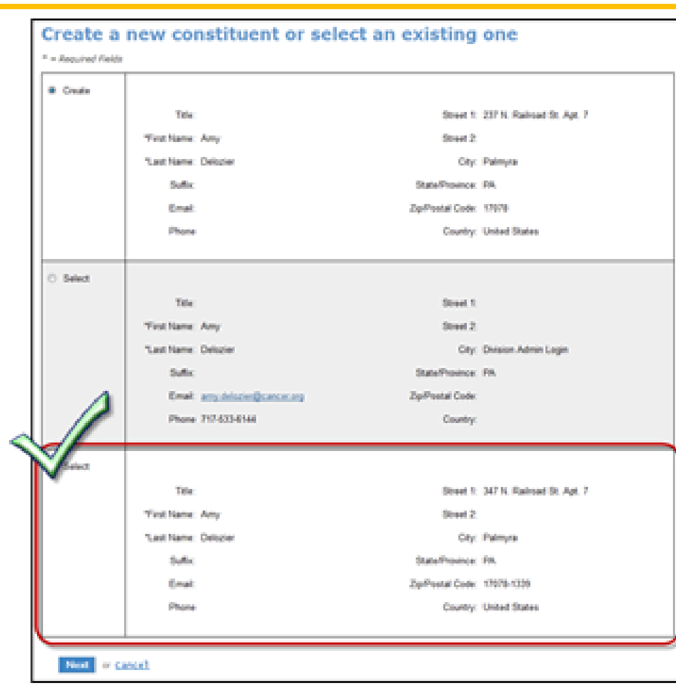
   a. **Name and Notes:** Complete the required fields (marked with an asterisk below)
      i. *Company Name
      ii. Public Company Name (this is what will appear on the page and in Top Companies lists)
      iii. Notes – you may want to use this field to identify this event as a sponsor. Content added here will not appear on the website, however it may be helpful for other event managers to have that information.
      iv. Goal- this must have an amount entered to show the progress to goal on the Company Page
      v. You can skip questions 5-Company Priority
      vi. *New Company to this TeamRaiser
         - If the company is new, leave the box checked
         - If they are a returning company, you can uncheck the box
      vii. Additional Custom Company Detail 1 and 2: Enter any additional information. This information will show up in reporting on the company.
      viii. Internal Staff Contact: Name of the primary contact at the company. Optional
      ix. Volunteer Manager: Name of the volunteer who will work with the company. Optional
      x. For the Participation Status, check confirmed
      xi. Click **Next**

   b. **Identify Company Coordinator:** This is optional but needed if you want to edit the Company Page. This must be a participant on an affiliated team so it may be best to wait and edit this step later after teams have signed up.
      i. Fill in the company coordinator contact information.
      ii. Click **Next**

NOTE: *Upon clicking Next, you may see this screen.*

If the company coordinator has participated <u>online</u> in an American Cancer Society event before, the system will match the participant details you entered with an existing record.

Verify the participant details against the existing record(s), select the correct record and move on by clicking Next



c. **Identify Executive Champion** (Optional):
    i. Fill in the contact information for a person from the company who can be contacted for information and questions about general company involvement.
    ii. Click **Next**

d. **Review Company Tree**- Click Next

e. **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 participants and teams to select in the Dashboard.

*View a short 5 minute “how to” video on setting up a Local Company and affiliating teams.

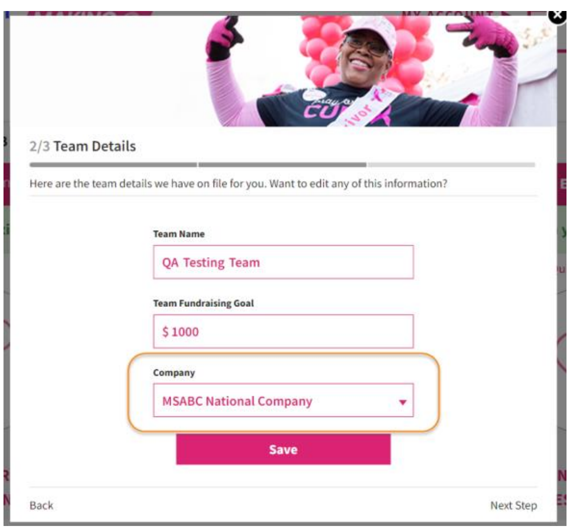
Affiliate Company Teams

Any team or individual who signs up from the Company Page will be automatically affiliated with the Company. If this step is missed, teams and participants can also update their affiliation within their Fundraising Dashboard. The affiliation can also be updated by an Event Manager within the EMC.

Dashboard Affiliation

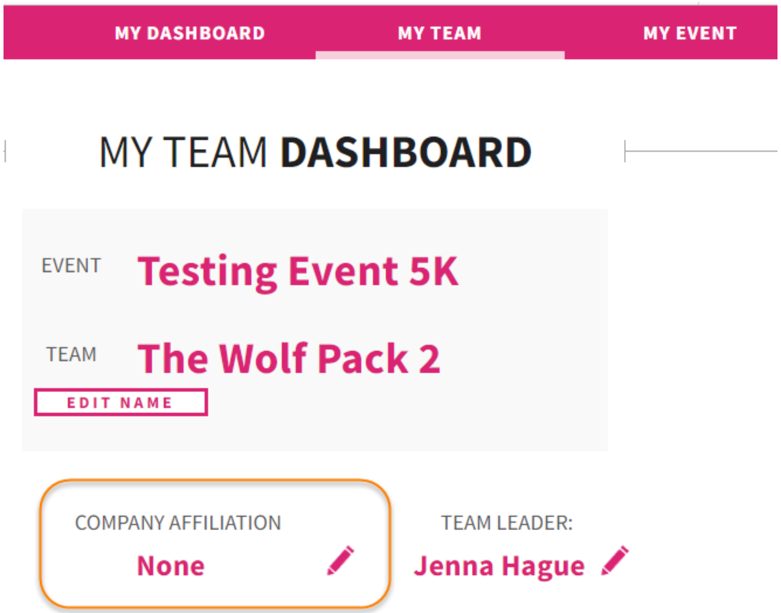
Option 1: Team Captain/Leader Post-Registration

Immediately after signing up, the team leader will see a post-registration pop-up in their Dashboard. On Step 2, the option to select a Company will appear.



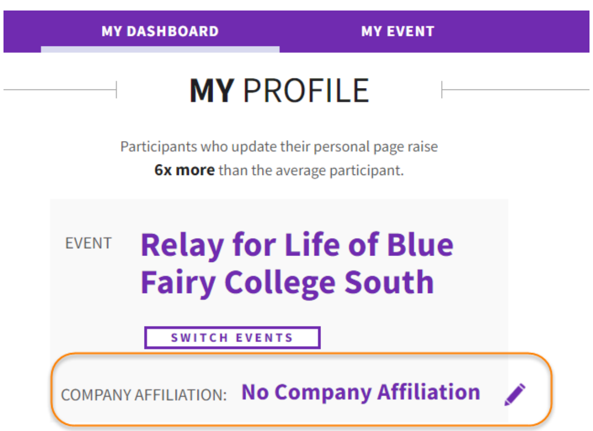
Option 2: Team Captain/Leader from My Team Dashboard

Team Captains and Team Leaders can also update from the My Team tab in their Dashboard under My Team Dashboard.



Option 3: Individuals Not on a Team

If a participant who is not a member of a team needs to select a company, the option is available under My Dashboard by scrolling down to My Profile



Event Management Center Affiliation

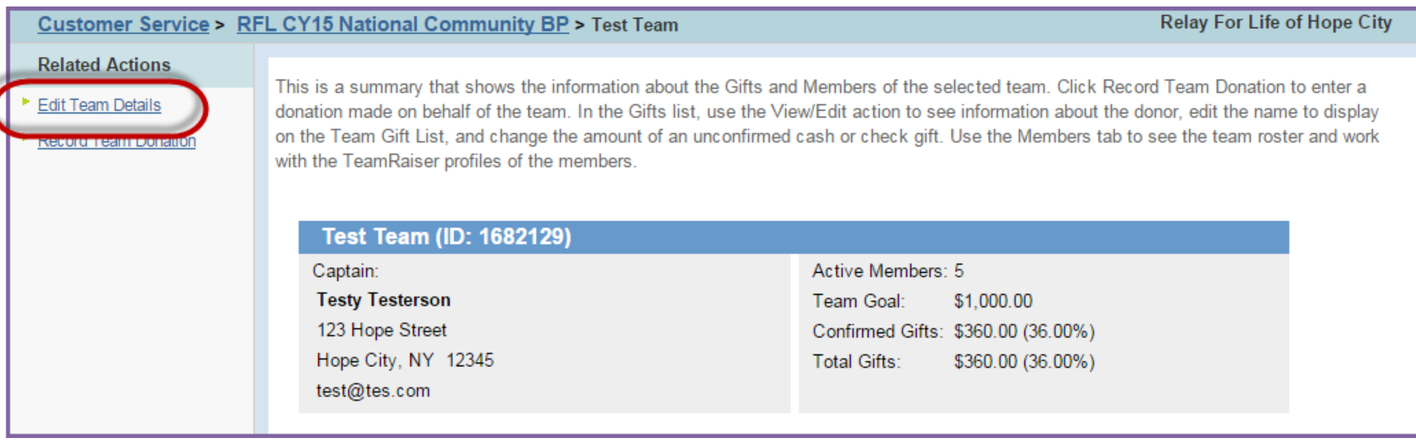
1. From the EMC, click **Customer Service** in the top Navigation Bar.

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

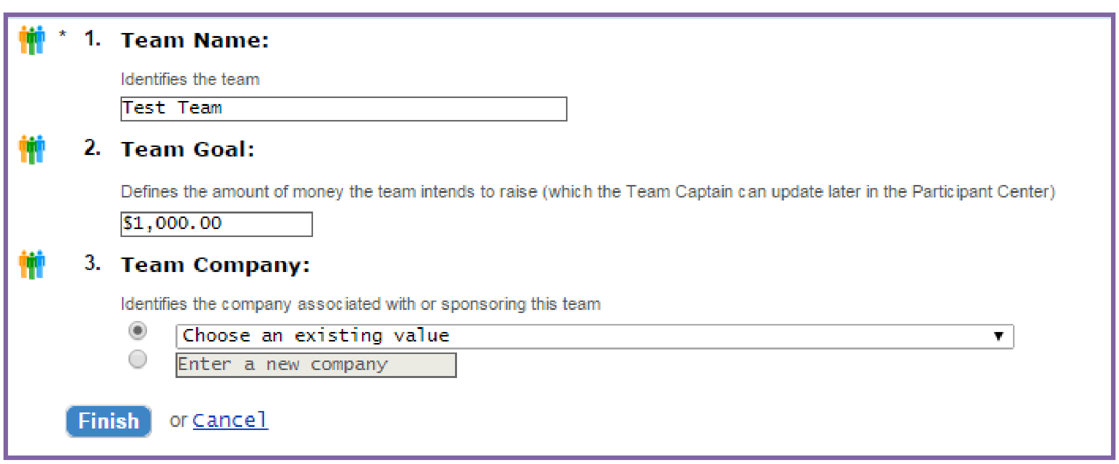
3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

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.**



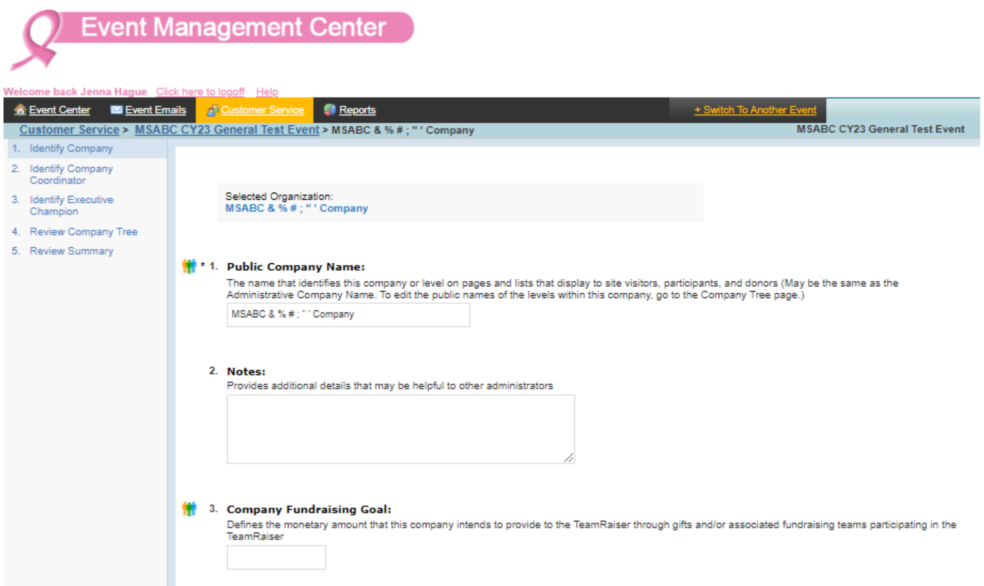
Manage Company Page

External ACS volunteers are not able to make updates to the content on their Company Fundraising Pages. Please see the steps below available for Event Managers.

Edit Company name and goal

In the Event Management Center (EMC):

1. Click on Customer Service tab
2. Select Manage Companies under Related Actions on left
3. Find company and select Edit Company
4. Update company name and goal amount
5. Hit next until arriving at Step 5 Review Summary and click Finish

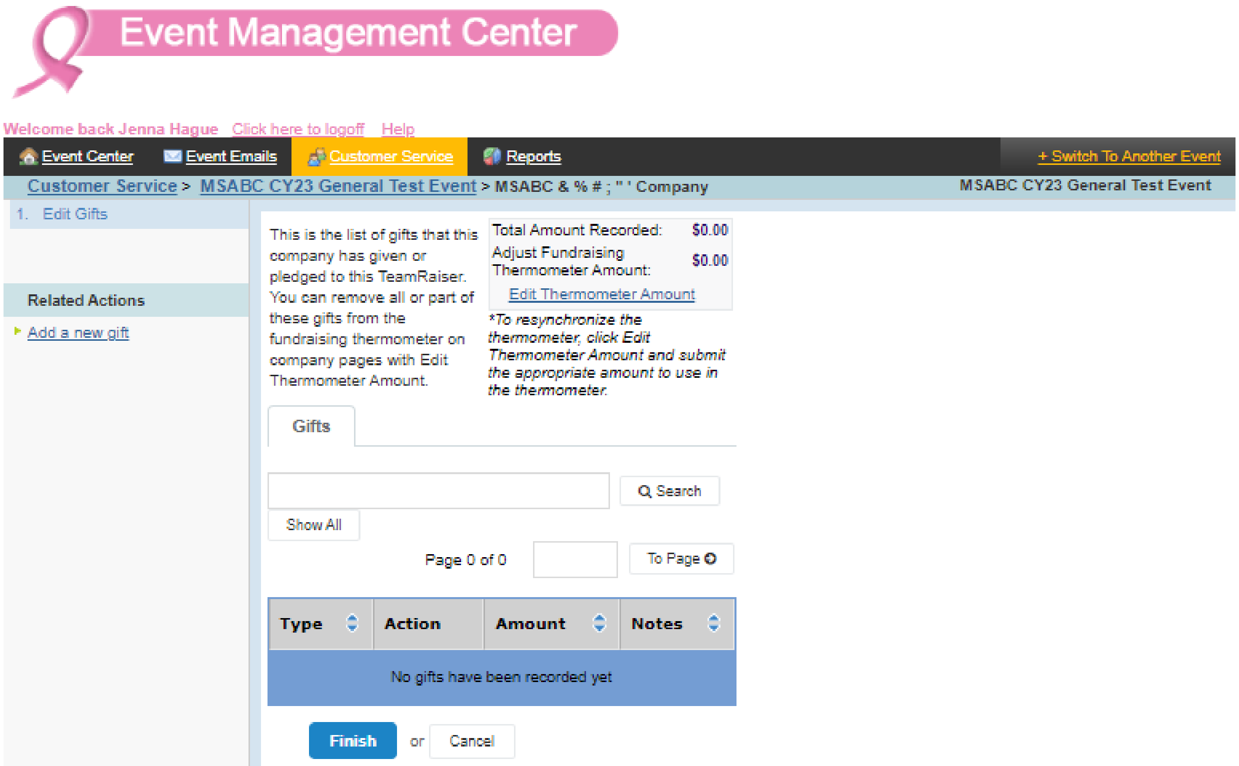


Add company level gift

Note: Donations are unavailable at the company level. You can as an offline unconfirmed donation to advance the total raised on the page, but it will not flow into Salesforce or other financial systems. This option could be used to signify sponsorship or other gift to event by the company they would like reflected in total raised by the company on the page.

In the Event Management Center (EMC):

1. Click on Customer Service tab
2. Select Manage Companies under Related Actions on left
3. Find company and select Manage Company
4. Click on Add a new gift under Related Actions on the left
5. Enter gift amount and hit Finish

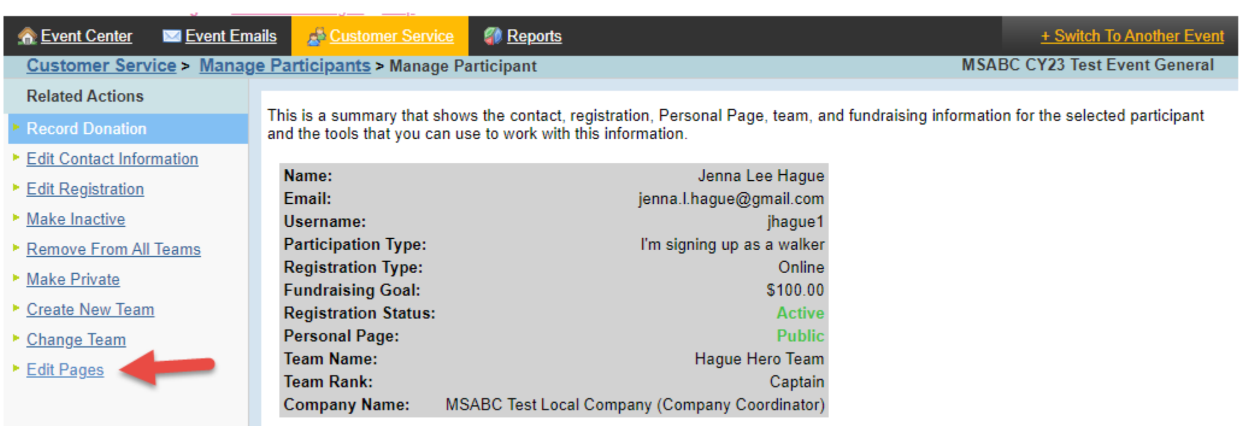


Edit Company Page Logo and Story

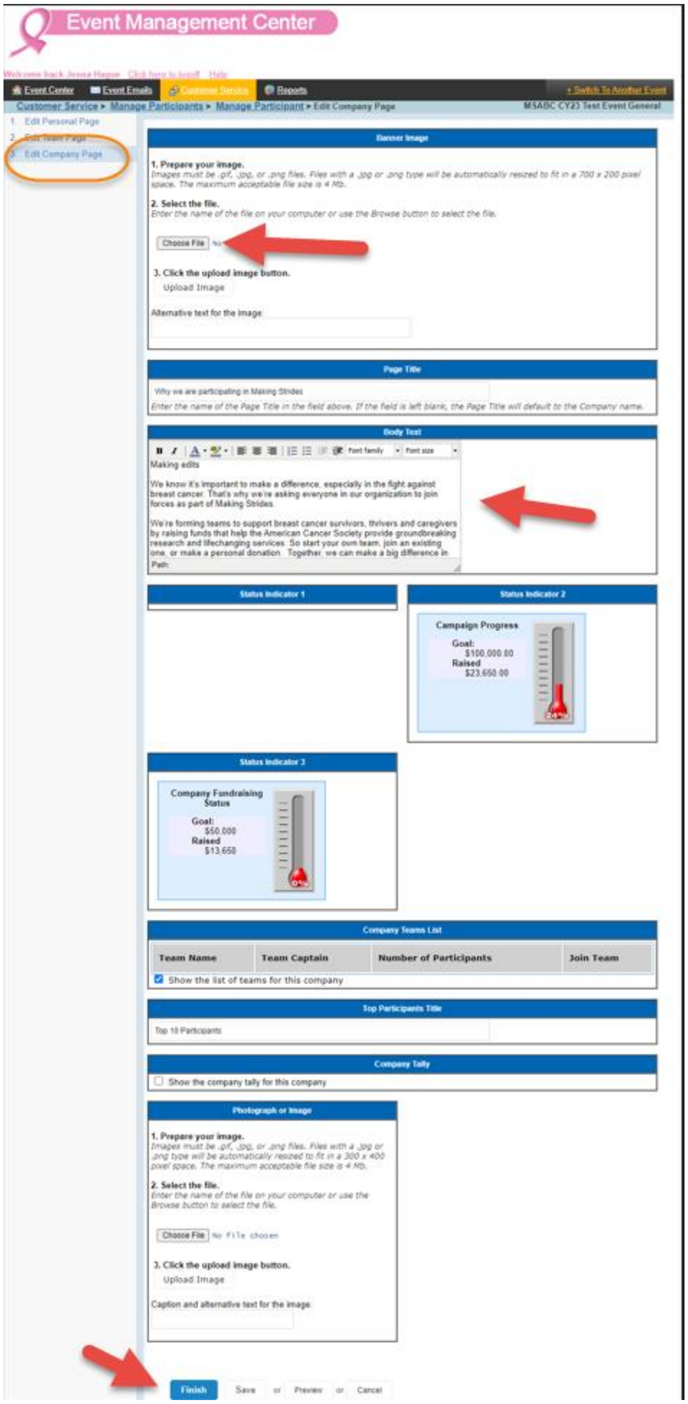
Note: The Company first must be assigned a Company Coordinator who is a member of a team affiliated with the company. To assign a Company Coordinator, edit the Local Company and follow the steps above.

In the Event Management Center (EMC):

1. Click on Customer Service tab
2. Select Manage Participants under Related Actions on left
3. Search for the participant that you made Company Coordinator and click Manage Participant
4. Click Edit Pages on left under Related Actions

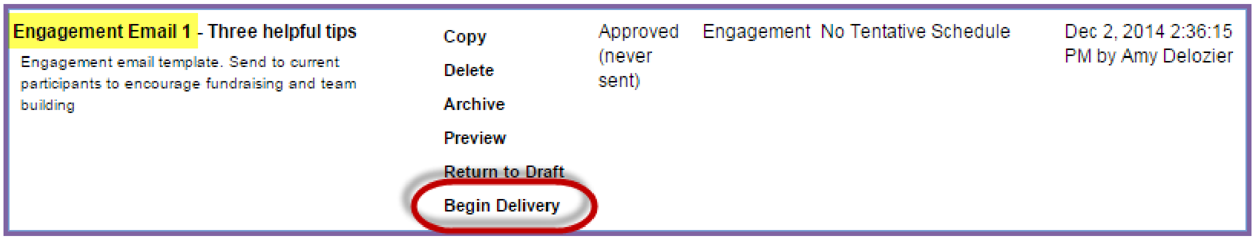


5. Select Edit Company Page on left under Related Actions
6. Under Banner Image- Click Choose File button under Select the File
7. Click Update Image- This will update the image at the top of the Company Page
8. Update Body Text- this will update under Why We are Participating on the Company Page
9. Click Finish when edits are complete to save



Email company participants

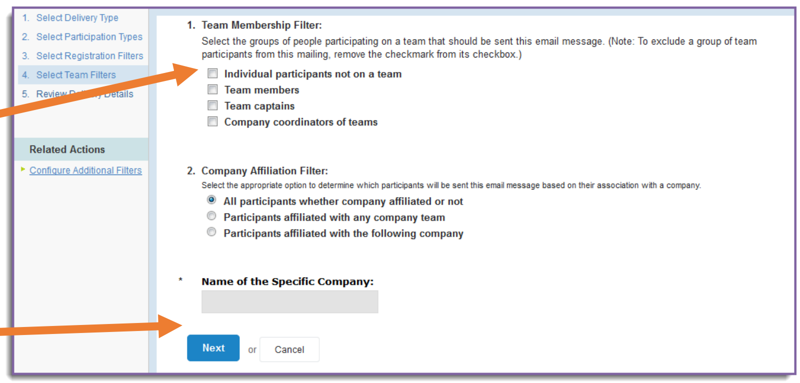
In order to send an email just to the participants and teams for a specific company. Start by creating a local email message and clicking Begin Delivery.



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.

See these resources for more details about sending Event Emails:

- [Quick Email Guide]
- [Email Filtering]
- [Event Emails]

Reporting

To view a report for a Local Company, run any report from the Reports tab in the EMC (example Participant Report) and download as CSV. In Excel, sort or filter by Company to view just those results.