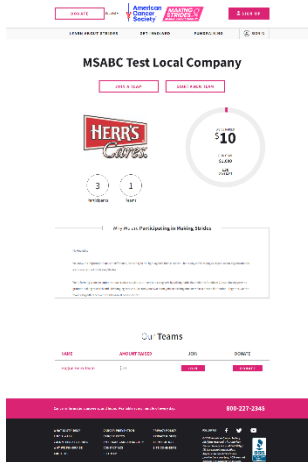


Local Company Page Guide for ACS Staff



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:

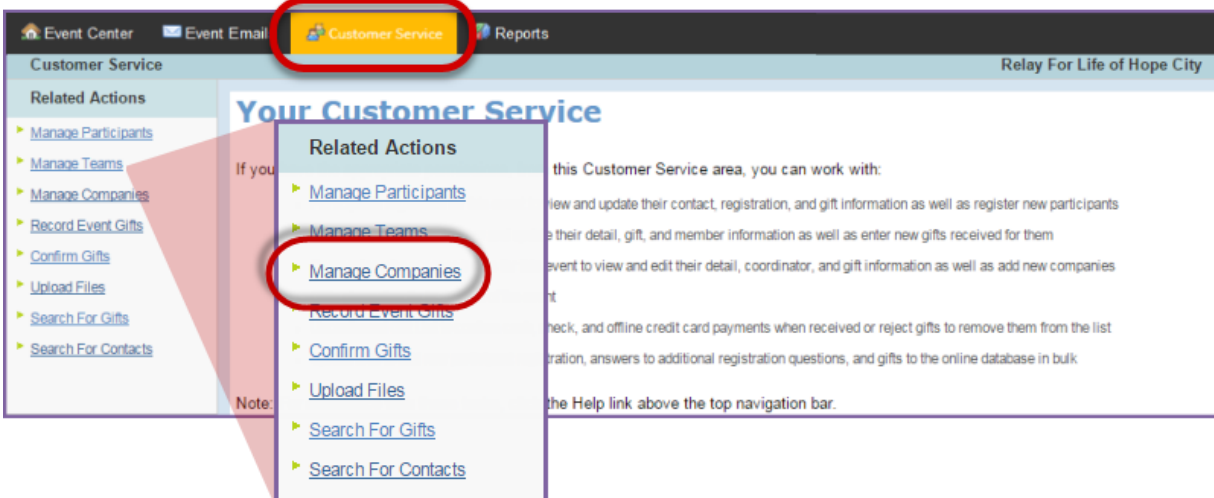
[Setting Up a Local Company](#) | [Affiliate Company Teams](#) | [Edit Company Name and Goal](#) | [Add Company level gift](#) | [Edit Company Page Logo and Story](#) | [Email Company Participants](#) | [Company Reporting](#)

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 online 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

The screenshot shows a web form titled "Create a new constituent or select an existing one". It has a header with a blue asterisk indicating required fields. The form is divided into three sections: "Create", "Select", and another "Select" section. Each section contains a form with fields for Title, First Name, Last Name, Suffix, Email, Phone, Street 1, Street 2, City, State/Province, Zip/Postal Code, and Country. A green checkmark is placed over the second "Select" section, which is highlighted with a red border. The "Next" button is highlighted in blue at the bottom left.

- 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.

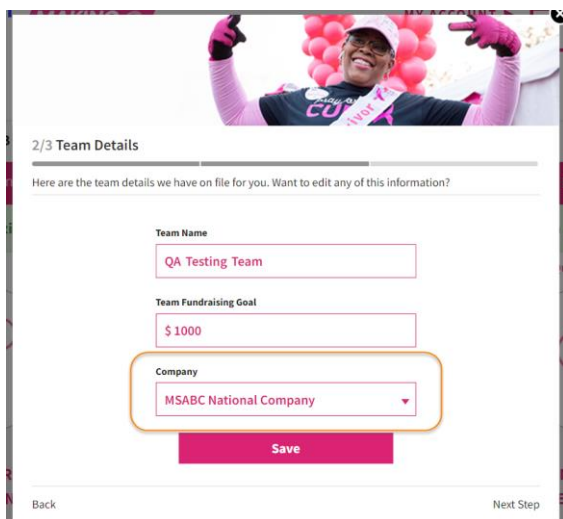
Affiliate Company Teams

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.



2/3 Team Details

Here are the team details we have on file for you. Want to edit any of this information?

Team Name
QA Testing Team

Team Fundraising Goal
\$ 1000

Company
MSABC National Company

Save

Back Next Step

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.

The screenshot shows a navigation bar with three tabs: 'MY DASHBOARD', 'MY TEAM' (which is active), and 'MY EVENT'. Below the navigation bar is a header for 'MY TEAM DASHBOARD'. The main content area displays the event name 'Testing Event 5K' and the team name 'The Wolf Pack 2'. There is an 'EDIT NAME' button below the team name. Below this, there are two fields: 'COMPANY AFFILIATION' with the value 'None' and a pencil icon, and 'TEAM LEADER:' with the name 'Jenna Hague' and a pencil icon.

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

The screenshot shows a navigation bar with two tabs: 'MY DASHBOARD' (which is active) and 'MY EVENT'. Below the navigation bar is a header for 'MY PROFILE'. A message states: 'Participants who update their personal page raise 6x more than the average participant.' Below this, the event name 'Relay for Life of Blue Fairy College South' is displayed. There is a 'SWITCH EVENTS' button below the event name. At the bottom, the 'COMPANY AFFILIATION:' field is set to 'No Company Affiliation' with a pencil icon.

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.

Name	Action	Team Captain	Company	Team Goal
Test Team ID: 1682129	Manage Disband Team	Testy Testerson test@tes.com		\$1,000.00

5. From the team record, under Related Actions, click Edit **Team Details**.

Customer Service > RFL CY15 National Community BP > Test Team Relay For Life of Hope City

Related Actions

- Edit Team Details**
- [Record Team Donation](#)

This is a summary that shows the information about the Gifts and Members of the selected team. Click Record Team Donation to enter a donation made on behalf of the team. In the Gifts list, use the View/Edit action to see information about the donor, edit the name to display on the Team Gift List, and change the amount of an unconfirmed cash or check gift. Use the Members tab to see the team roster and work with the TeamRaiser profiles of the members.

Test Team (ID: 1682129)	
Captain: Testy Testerson 123 Hope Street Hope City, NY 12345 test@tes.com	Active Members: 5 Team Goal: \$1,000.00 Confirmed Gifts: \$360.00 (36.00%) Total Gifts: \$360.00 (36.00%)

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.**

* **1. Team Name:**
Identifies the team

2. Team Goal:
Defines the amount of money the team intends to raise (which the Team Captain can update later in the Participant Center)

3. Team Company:
Identifies the company associated with or sponsoring this team
 Choose an existing value
 Enter a new company

Finish or [Cancel](#)

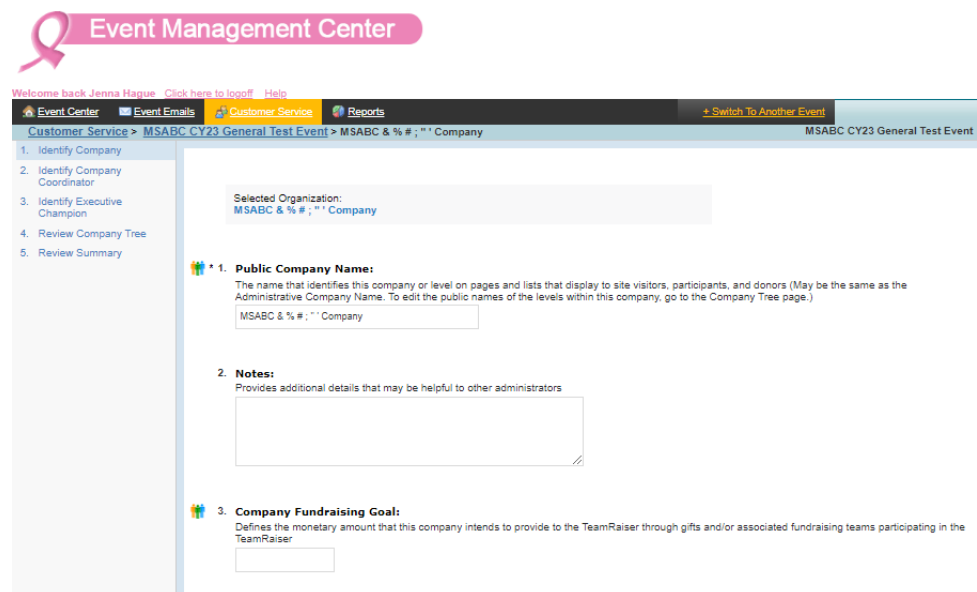
Manage Company Page

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



Welcome back Jenna Hague. [Click here to logoff](#) [Help](#)

Event Center | Event Emails | **Customer Service** | Reports | [Switch To Another Event](#)

Customer Service > MSABC CY23 General Test Event > MSABC & % # ; "" Company | MSABC CY23 General Test Event

1. Identify Company
2. Identify Company Coordinator
3. Identify Executive Champion
4. Review Company Tree
5. Review Summary

Selected Organization:
MSABC & % # ; "" Company

1. Public Company Name:
The name that identifies this company or level on pages and lists that display to site visitors, participants, and donors (May be the same as the Administrative Company Name. To edit the public names of the levels within this company, go to the Company Tree page.)

2. Notes:
Provides additional details that may be helpful to other administrators

3. Company Fundraising Goal:
Defines the monetary amount that this company intends to provide to the TeamRaiser through gifts and/or associated fundraising teams participating in the TeamRaiser

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

Event Management Center

Welcome back Jenna Hague [Click here to logoff](#) [Help](#)

Event Center | Event Emails | Customer Service | Reports | [+ Switch To Another Event](#)

Customer Service > MSABC CY23 General Test Event > MSABC & % # ; " ' Company MSABC CY23 General Test Event

1. Edit Gifts

This is the list of gifts that this company has given or pledged to this TeamRaiser. You can remove all or part of these gifts from the fundraising thermometer on company pages with Edit Thermometer Amount.

Total Amount Recorded: \$0.00
Adjust Fundraising Thermometer Amount: \$0.00
[Edit Thermometer Amount](#)

*To resynchronize the thermometer, click [Edit Thermometer Amount](#) and submit the appropriate amount to use in the thermometer.

Gifts

Q Search

Show All

Page 0 of 0 To Page

Type	Action	Amount	Notes
No gifts have been recorded yet			

Finish or Cancel

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

Event Center | Event Emails | Customer Service | Reports | [+ Switch To Another Event](#)

Customer Service > Manage Participants > Manage Participant MSABC CY23 Test Event General

Related Actions

- Record Donation
- Edit Contact Information
- Edit Registration
- Make Inactive
- Remove From All Teams
- Make Private
- Create New Team
- Change Team
- Edit Pages

This is a summary that shows the contact, registration, Personal Page, team, and fundraising information for the selected participant and the tools that you can use to work with this information.

Name: Jenna Lee Hague
Email: jenna.l.hague@gmail.com
Username: jhague1
Participation Type: I'm signing up as a walker
Registration Type: Online
Fundraising Goal: \$100.00
Registration Status: Active
Personal Page: Public
Team Name: Hague Hero Team
Team Rank: Captain
Company Name: MSABC Test Local Company (Company Coordinator)

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

Event Management Center

Welcome back, Susan Hester. Click here to log out. Help

Event Center | Event Emails | **Company Details** | Reports | Switch To Another Event

Customer Service > Manage Participants > Manage Participant > Edit Company Page MSADL CY23 Test Event General

1. Edit Personal Page
2. Edit Team Page
3. **Edit Company Page**

Banner Image

1. **Prepare your image.**
Images must be .gif, .jpg, or .png files. Files with a .jpg or .png type will be automatically resized to fit in a 700 x 200 pixel space. The maximum acceptable file size is 4 MB.

2. **Select the file.**
Enter the name of the file on your computer or use the Browse button to select the file.

No file chosen

3. **Click the upload image button.**
Upload Image

Alternative text for the image:

Page Title

Why we are participating in Making Strides

Enter the name of the Page Title in the field above. If the field is left blank, the Page Title will default to the Company name.

Body Text

Making strides

We know it's important to make a difference, especially in the fight against breast cancer. That's why we're asking everyone in our organization to join forces as part of Making Strides.

We're forming teams to support breast cancer survivors, thrivers and caregivers by raising funds that help the American Cancer Society provide groundbreaking research and life-changing services. So start your own team, join an existing one, or make a personal donation. Together, we can make a big difference in Pink.

Status Indicator 1

Status Indicator 2

Campaign Progress

Goal: \$100,000.00
Raised: \$23,650.00

Status Indicator 3

Company Fundraising Status

Goal: \$50,000
Raised: \$13,650

Company Teams List

Team Name	Team Captain	Number of Participants	Join Team
<input checked="" type="checkbox"/> Show the list of teams for this company			

Top Participants Title

Top 10 Participants

Company Tally

Show the company tally for this company

Photograph of Image

1. **Prepare your image.**
Images must be .gif, .jpg, or .png files. Files with a .jpg or .png type will be automatically resized to fit in a 300 x 400 pixel space. The maximum acceptable file size is 4 MB.

2. **Select the file.**
Enter the name of the file on your computer or use the Browse button to select the file.

No file chosen

3. **Click the upload image button.**
Upload Image

Caption and alternative text for the image:

Save or Preview or Cancel

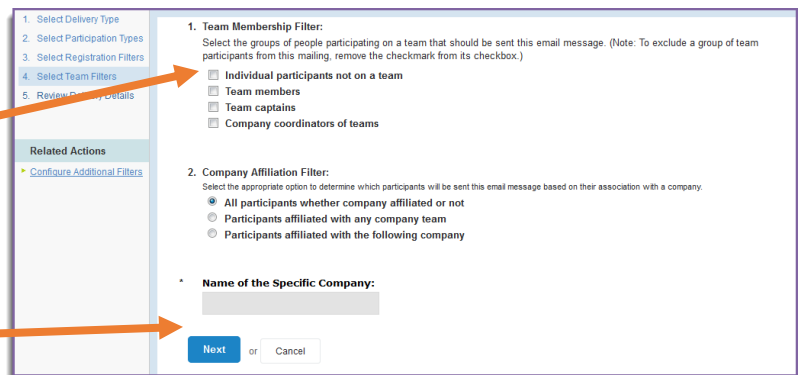
Email company participants

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.

The screenshot shows the "Reports" section in the EMC interface. It includes a navigation bar with "Event Center", "Event Emails", "Customer Service", and "Reports". Below the navigation bar, there is a "Report Results" tab. The main content area shows a table of reports with columns for "Name & Description", "Actions", "Category", "Type", and "Last Activity". The table contains four rows of reports, each with a "Run Report" button.

Name & Description	Actions	Category	Type	Last Activity
01 Event Snap Shot Report An event snapshot with overall event totals for online & offline not received gifts, F ocs, # of teams, and # of participants	Run Report	MSABC CY23 National	TeamRaiser	2022/04/22 21:39 by lly.mahler@cancer.org
02 Team Summary Report Includes team creation date, team leader contact information, company affiliation, number of participants, and fundraising totals	Run Report	MSADC CY23 National	TeamRaiser	2022/04/22 21:39 by lly.mahler@cancer.org
03 Participant Report Participant detailed list. Times are in CST. For published websites only if your website is closed use the post event report	Run Report	MSABC CY23 National	TeamRaiser	2022/04/22 21:39 by lly.mahler@cancer.org
04 Participant Emails Sent (Date Range Report)	Run Report	MSADC CY23	TeamRaiser	2022/04/22 21:39 by