AMERICAN CANCER SOCIETY
ONLINE EVENT MANAGEMENT GUIDE

This Guide is broken out into two main parts:

The Participant Experience
(signing up and using the dashboard)

The Event Manager Experience
(working within the different functions of the EMC)

Note: while the screen shots may reflect Relay For Life, the steps outlined in this guide are applicable across all programs.

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If you have any questions, please open a Salesforce Case
# Table of Contents

## THE PARTICIPANT EXPERIENCE

**Chapter 1: Society Account**
- Creating a New Society Account .......................................................... 5
- Logging in to Your Existing Society Account ........................................... 7
- Manage Your Society Account ............................................................... 8

**Chapter 2: Sign Up**
- Start a New Team ................................................................................. 10
- Bring Back a Returning Team ............................................................... 13
- Join a Team ......................................................................................... 15
- Register as an Individual ..................................................................... 18

**Chapter 3: Quick Start Guide**
- Access Your Quick Start Guide ............................................................. 21
- Complete Your Profile ......................................................................... 21
- Personalize Your Page .......................................................................... 22
- Claim Your Badge (Survivors & Caregivers only) ................................. 23
- Update Your Goal .............................................................................. 23
- Make a Donation ................................................................................ 24

**Chapter 4: Participant Dashboard** ....................................................... 25

**Chapter 5: Team Captain Dashboard** ................................................ 27

**Chapter 6: Manage Your Personal/Team Page**
- Edit Your Personal/Team Page .............................................................. 29
- Update Your Personal/Team Goal ......................................................... 30

**Chapter 7: Emailing From Your Dashboard**
- Compose a New Message ..................................................................... 31
- Thank Your Donors ............................................................................. 33

**Chapter 8: Manage Your Contacts**
- Manage Your Address Book ................................................................. 33
- Create an Email Group ....................................................................... 34

**Chapter 9: Donate Online**
- Make an Online Donation .................................................................. 36

*If you have any questions, please open a [Salesforce Case](#)*
THE EVENT MANAGER EXPERIENCE

Chapter 1: Access the Event Management Tools
- Log in as Event Manager ................................................................. 38
- Event Manager View of Website ...................................................... 38
- Access the Event Management Center .......................................... 39
- Access the Website Editing Tools .................................................. 39

Chapter 2: Event Center Customization ............................................. 40
- Edit Event Center ........................................................................... 40
- Edit Milestones ............................................................................. 42

Chapter 3: Edit Greeting Page .......................................................... 43
- Using the Edit Tool ........................................................................ 43
- Change Your Banner Image ......................................................... 43
- Edit Content Blocks ..................................................................... 43
- Edit Event Announcements ......................................................... 44
- Sort and Hide Sections ................................................................. 44
- Add Local Forms & Documents .................................................... 44
- Add Local Sponsors ..................................................................... 45
- Add Custom Content .................................................................... 46

Chapter 4: Edit and Create Content Pages ..................................... 47
- Using the Edit Tool ........................................................................ 47
- Create a Custom Page ................................................................... 47
- Manage Custom Pages ................................................................ 48
- Customize Your Page ................................................................... 48
- Edit Event Details Page ................................................................ 49
- Edit Local Sponsors Page ............................................................. 50

Chapter 5: Event Emails ................................................................. 51
- Create and Customize a New Email .............................................. 51
- Copy a National Email Template to Customize ......................... 54
- Insert Documents and Photos ...................................................... 58
- Send your Local Message ............................................................ 60
- Review Sent and Scheduled Messages ....................................... 67

Chapter 6: Customer Service – Manage Participants ..................... 69
- Search for Participants ................................................................ 69
- View a Participant’s Gift History ............................................... 70
- Edit the Registration Information of a Participant ..................... 71
- Edit the Team Information of a Participant ................................. 76

If you have any questions, please open a Salesforce Case
Move a Participant to a Team................................................................. 76
Create a New Team with a Participant as Team Captain.......................... 77
Promote or Demote Team Members and Team Captains.......................... 77

Chapter 7: Customer Service – Manage Teams........................................ 79
Search for a Team .................................................................................. 79
View Team Member Roster .................................................................... 80
View a Team’s Gift History ...................................................................... 80
Edit a Team’s Registration Information ................................................. 81

Chapter 8: Customer Service – Manage Companies .................................. 83
Add a Local Company ........................................................................... 83
Edit the Local Company Details ............................................................ 84

Chapter 9: Customer Service – Manage Gifts .......................................... 86
Search for Gifts .................................................................................... 86
Enter Offline Donations Received ......................................................... 87
Change the Honor Roll Name on a Participant’s Page .......................... 89
Move the Credit of a Donation to another Participant or Team ............... 90
Refund a Donation .............................................................................. 91

Chapter 10: Reports ................................................................................ 92
Access Reports ...................................................................................... 92
Run and Download Reports ................................................................... 92
Utilizing the Report Results Tab ............................................................ 93
Accessing Past Event Manager Centers and Reports ............................. 94

APPENDICES

Appendix A: EMC Access for Staff and Volunteers ................................. 96
Appendix B: Sponsor name (5) customization ......................................... 97
Appendix C: Manage Event Library ......................................................... 97
Appendix D: Online Email Campaign Best Practices ............................... 103
Appendix E: Email Filtering .................................................................. 107
Appendix F: Event Management Center Report Guide ............................ 110

If you have any questions, please open a Salesforce Case
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, Real Men Wear Pink, 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.

If you have any questions, please open a Salesforce Case
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, please call our web site support desk at 877-957-7848.
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, Real Men Wear Pink, 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 you need additional assistance accessing your 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.

*If you have any questions, please open a Salesforce Case*
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.

If you have any questions, please open a Salesforce Case
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.

*If you have any questions, please open a [Salesforce Case](#)*
Chapter 2: Sign Up

- Start a New Team
- Bring Back a Returning Team
- Join a Team
- Register as an Individual

Start a New Team

1. Visit your event website.
2. Click on the Join/Sign Up button (button verbiage may vary based on program)
3. You will be asked to enter an email address. (see previous section for more info on Society Account)
4. 
5. Once you have logged into registration, update Your Fundraising Section.

If you have any questions, please open a Salesforce Case
6. If you would like to make a donation to kick start your fundraising, select a **gift value** or enter a different amount. If not, select **No, Thanks**.

7. Select **Next**
8. Select **Start a team** and enter your **Team Name** in the field that appears below.
9. Select **Next**

*If you have any questions, please open a Salesforce Case*
10. 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.

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

12. Once finished, click Sign up.

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

If you have any questions, please open a Salesforce Case
Bring Back a Returning Team

1. Visit your event website.

2. Click on the **Join/Sign Up** button (button verbiage may vary based on program)

3. You will be asked for your email. (see **previous section** for more info on Society Account)

4. Once you have logged into registration, update any information that changed from the previous year.

5. The system will recognize if you were a member of a team last year and ask if you want to bring it back!

6. If you would like to make a donation to kick start your fundraising, select a **gift value** or enter a different amount. If not, select **No, Thanks**.

7. Select **Sign up**

*If you have any questions, please open a Salesforce Case*
8. Your registration is complete, Welcome to your dashboard!

If you have any questions, please open a Salesforce Case
Join a Team

1. Visit your event website.

2. Click on the Join/Sign Up button (button verbiage may vary based on program).

3. You will be asked for your email. (see previous section for more info on Society Account)

4. If you would like to make a donation to kick start your fundraising, select a gift value or enter a different amount. If not, select No, Thanks.

If you have any questions, please open a Salesforce Case.
5. Select **Next**
6. Select **Join a team** and enter your **Team Name** in the search field.

7. Select **Next**

*If you have any questions, please open a Salesforce Case*
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 Sign up.

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

If you have any questions, please open a Salesforce Case
Register as an Individual

1. Visit your event website.

2. Click on the Join/Sign Up button (button verbiage may vary based on program)

3. You will be asked for your email. (see previous section for more info on Society Account)

4. If you would like to make a donation to kick start your fundraising, select a gift value or enter a different amount. If not, select No, Thanks.

If you have any questions, please open a Salesforce Case
5.  Select **Next**
6.  Select **Participate Solo**.

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7.  Select **Next**

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*If you have any questions, please open a Salesforce Case*
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 **Sign up**.

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

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**If you have any questions, please open a **Salesforce Case**
Chapter 3: Quick Start Guide

- Access Your Quick Start Guide
- Complete Your Profile
- Personalize Your Page
- Claim Your Badge (Survivors & Caregivers only)
- 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 Salesforce Case
Complete Your Profile

1. From the Quick Start Checklist, click “Complete Your Profile”
2. Tell us more about yourself! Answer only the questions you want.
3. 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

If you have any questions, please open a Salesforce Case
Claim Your Badge
(Survivors & Caregivers only)

1. From the Quick Start Checklist, click “Claim your badge”

2. If you wish to display your Survivor/Caregiver badge on your personal fundraising page, click **Yes**

Update Your Goal

1. From the Quick Start Checklist, click “Update Your Goal”

2. Enter your new goal.

3. Click **Save Changes** once finished

*If you have any questions, please open a **Salesforce Case**.*
Make a Donation

1. From the Quick Start Checklist, click “Make a Donation.”

2. Select amount, or enter another amount and click Donate.

3. You will be taken to the donation form to complete the personal donation process.

*If you have any questions, please open a Salesforce Case*
Log in and access your Fundraising Dashboard from your computer, tablet, or phone. It’s so easy to ask for donations and track your progress to your fundraising goals!

1. Create a Facebook Fundraiser and link your Facebook fundraising to your Dashboard
2. Make a short URL for your fundraising page and share with your friends and family
3. Add a new profile photo
4. Use the new title and description for more storytelling, in addition to your personal story
5. Edit your personal fundraising goal
6. Add photos and a video to personalize your fundraising page

If you have any questions, please open a Salesforce Case.
7. Update your personal story and share why you support the American Cancer Society

8. View and thank your donors and send emails to your contacts

9. See all available activity and status badges— including those you have already earned

If you have any questions, please open a Salesforce Case
Chapter 5: Team Captain Dashboard

1. 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.

2. Create a team page URL

3. Add Photos & Video to Team Page

4. Edit your team name

5. Update team fundraising goal

If you have any questions, please open a Salesforce Case
6. Update your team story and share why you Relay!

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

8. See a complete list of team fundraising badges, including the ones your team has already earned!

9. Access additional fundraising resources from directly within your dashboard!

If you have any questions, please open a Salesforce Case
Chapter 5: Manage Your Personal/Team Page

- **Edit Your Personal/Team Page**
  - Add Profile Photo
  - Add Photos and Video
  - Edit Your Story
  - Update Title & Description
- **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 Profile Photo

1. **Profile Pic** – Insert one photo. Supported photos are .jpeg, .gif, or .png and they should be smaller than 4MB.

### 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 Select Photo 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.

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.

*If you have any questions, please open a Salesforce Case*
Update Title and Description
1.) Edit Title - Update the title for your page up to 80 characters.
2.) Edit Description – Update description up to 160 characters. The description will appear under the title of your page and your personal page donation form.

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

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.

If you have any questions, please open a Salesforce Case
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.

If you have any questions, please open a Salesforce Case
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.

*If you have any questions, please open a Salesforce Case*
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
- 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

1. Log into your Dashboard.

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

3. 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.

If you have any questions, please open a Salesforce Case.
If you have any questions, please open a Salesforce Case
4. Add to an existing group, or create a new group, then click Save.

5. When finished, click Save Changes.

If you have any questions, please open a Salesforce Case
Make an Online Donation

1. Visit your event website.
2. Click on the Donate button.
3. You will be taken directly to the donation form.
4. Complete the donation form

If you have any questions, please open a Salesforce Case
Gift Credit

Use the search to identify which person, team or event you want to credit with your gift.

Gift Info

Select the gift amount or enter a specific donation 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.

You can change your display options:
- Leave a private message
- Change how your name displays
- Choose if the gift amount displays

Click the Donate button to complete the transaction.

If you have any questions, please open a Salesforce Case
THE EVENT MANAGER EXPERIENCE

Chapter 1: Access the Event Management Tools

- Log in as Event Manager
- Event Manager View of Website
- Access the Event Management Center
- Access Website Editing Tools

Log in as Event Manager

1. Visit your event website
   a. Existing Staff/Volunteers: Your log in information will be the same as it was in prior years. 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.

Event Manager View of Website

1. When logged in as an Event Manager, your view of the website will update to show the editable portions of your website

If you have any questions, please open a Salesforce Case
Access the Event Management Center

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

2. The Event Manager Center (EMC) will appear. The EMC is divided into four sections. Upcoming chapters will dive into the sections.

3. On the left side are Related Actions associated within the particular tab you are working in.

Access the Website Editing Tools

1. Click the Edit pencil to open your pages for editing.

2. See Chapter 3 and Chapter 4 for complete steps for editing your web site content.

If you have any questions, please open a Salesforce Case
Chapter 2: Event Center Customization

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

### Edit Event Center

1. From the EMC, click the **Event Center** tab 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 event fundraising goal, as this will populate the progress wheel on the greeting page.
   - b. **Click ‘Next’**

2. **Location Information**
   - a. **Event Location Details and Local Office Mailing Address**: Verify that the information in each of these data fields is correct.
   - b. **Click ‘Next’**

3. **Edit Advanced Options**
   - a. **New Team Notification (Optional)**: Enter your email address if you wish to be notified whenever a new team registers for your event. You can enter multiple email addresses; simply put a comma between each email.
   - b. **Click ‘Next’**

4. **Edit eCommerce Options**
   - a. **eCommerce Store Associated With the Event Products**: Your event has been defaulted to the standard product. To offer a different product, swap out the 5-digit ID for the store you need.
      - i. **Relay For Life store options**: [http://relayforlife.org/LuminariaStores](http://relayforlife.org/LuminariaStores)
      - ii. **Making Strides store options**
      - iii. **Active/Community Fundraising store options**
      - iv. **If you wish to offer a store that does not appear on this list, please complete a detailed Event Web Site Help Ticket. Include a list of the names and prices of the products you wish to offer.**
   - b. **Click ‘Finish’**
   - c. **To remove your store, delete the store ID and save.**

#### Edit Event Properties

1. **Event Name**: Verify the Event Name is correct.

*If you have any questions, please open a [Salesforce Case](#)*
2. Schedule: Verify the Event Start Time

3. Date & Time: Verify the Event Date

4. Event Location Details: Verify that the event location name, state and city are correct.

5. 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): SMS Opt-in Widget. If your event is utilizing SlickText for an event-wide text campaign, enter your textword to turn on the opt-in widget.
   b. Sponsor name (2): Official 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 full url for your page or group.
   e. Sponsor name (5): This field can accommodate various “codes” to add features to your greeting page.
      i. See Appendix B for the full details for customizing Sponsor Line 5
      ii. Add an Flickr URL to populate Event Photos
      iii. Add a live stream link
      iv. Enable the Instagram widget (RFL, MSABC, and Active events only)

6. Click ‘Finish’

**Edit Event Coordinator Properties**

1. Name: Verify ACS Staff Person or volunteer name.

2. Phone: Verify ACS Staff Person or volunteer phone.

3. Email: Verify ACS Staff person cancer.org email or volunteer email.

4. Click ‘Finish’

**Submit Event Changes**

*If you have any questions, please open a Salesforce Case*
If you find any event details are incorrect, you will need to submit the changes so they can be made in all databases. View the Salesforce Quick Reference Guide ‘How to Make Event Changes’ for the most up to date process.

**Edit Milestones**

You can enter email addresses to be notified when participants reach certain milestone levels.

1. Click ‘Edit’ next to the milestone levels you want to receive notifications for. Type the email address and click ‘Add.’

   ![Email Addresses](image)

   a. If that person no longer wishes to receive email notifications, you can select that email address from the list and click ‘Remove.’

2. Click ‘Finish’

*If you have any questions, please open a Salesforce Case*
Chapter 3: Edit Greeting Page

- Using the Edit Tool
- Change Your Banner Image
- Edit Content Blocks
- Edit Event Announcements
- Sort and Hide Sections
- Add Local Forms and Documents
- Add Local Sponsors
- Add Custom Content

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

Edit Content Blocks
Some event websites may have a content block section for additional event information.

If you have any questions, please open a Salesforce Case
If you have any questions, please open a Salesforce Case
Add Local Sponsors

Turn your sponsor logo into a clickable button

Select your *logo size

Relay: Drag & sort to re-order your sponsor logos

Other Programs: Use the sort arrows to arrange logos

*Suggested Image Sizes for Sponsor Logos:

- 4x2: 384x184 px
- 3x2: 284x184 px
- 2x2: 184x184 px
- 2x1: 184x84 px
- 1x1: 84x84 px

If you have any questions, please open a Salesforce Case
Add Custom Content

Pick from the menu of templates to add custom content to your greeting page

If you have any questions, please open a Salesforce Case
Chapter 4: Edit and Create Content Pages

- Using the Edit Tool
- Create a Custom Page
- Manage Custom Pages
- Customize Your Page
- Edit Event Details Page
- Edit Local Sponsors Page

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

Create a Custom Page

Create a custom page by giving it a name and SAVE

Publish your page to add it to the More Info section

If you have any questions, please open a Salesforce Case
Manage Custom Pages

Click the page name to edit it

Delete your pages

Publish your page to add it to the More Info section

Import custom pages from last year

Customize Your Page

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

If you have any questions, please open a Salesforce Case
If you have any questions, please open a Salesforce Case
If you have any questions, please open a Salesforce Case.
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 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.

If you have any questions, please open a Salesforce Case.
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**.

![Message Information Screen Shot](image)

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

i. **Enter the sender’s name**: Enter who the email is “from.”

ii. **Enter the sender’s email address**: Enter the return email address to which the recipient can send reply emails. This must be an actual email address so questions will be delivered to the proper support.

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!

*If you have any questions, please open a Salesforce Case*
iv. Click Next.

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.

![WYSIWYG toolbar image]

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.

![Convert to Plain Text button image]

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.

*If you have any questions, please open a Salesforce Case*
h. Click Finish.

i. After approving the email for delivery, you’ll be returned to the Message List.

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**.

If you have any questions, please open a Salesforce Case.
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.

*If you have any questions, please open a Salesforce Case*
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.”
      ii. **Enter the sender’s email address**: Enter the return email address to which the recipient can send reply emails. This must be an actual email address so questions will be delivered to the proper support.
      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**.

   ![Process Navigator](image)

   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.

   ![WYSIWYG Editor](image)

*If you have any questions, please open a **Salesforce Case***
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

   ![Convert to Plain Text Button]

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.

   ![Approve Button]

h. Click Finish.

i. After approving the email for delivery, you’ll be returned to the Message List.
   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 Event Manager Center.
   iii. Preview: Preview the message in HTML and Plain text by clicking the Preview link.
   iv. 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.
   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.

If you have any questions, please open a Salesforce Case
Insert Documents and Photos

You can add local photos and documents to your event emails. Reference Appendix C: Manage Event Library for instructions for adding images and documents to your Event Library.

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.

If you have any questions, please open a Salesforce Case
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**

*Note: Images must be uploaded into the Event Library before you can insert them.*

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 curser 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 [Salesforce Case](#)*
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. Click **Insert**.

d. The image will appear on the webpage. While still in the edit field, pull the corners of the image to resize the picture. Through the WYSIWYG features, position the image aligned center, right, or left as desired.

e. 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**.

*If you have any questions, please open a *Salesforce Case*
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.

*If you have any questions, please open a **Salesforce Case***
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.)

   ❖ **Never select Current or Previous Event Donors for your email audience.** Those contacts were ‘recruited’ by the family and friends they donated to, and we (ACS) cannot contact them. 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**.

5. Apply any optional filters on the recipient list. Filters allow you to narrow the email recipient list by a number of

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*If you have any questions, please open a **Salesforce Case***
factors such as team captain status or registration date. See Appendix E for more information on the different filters and how to use them!

6. 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

7. 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.

If you have any questions, please open a Salesforce Case
8. 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.

*If you have any questions, please open a [Salesforce Case](#)*
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**.

   - **Never select Current or Previous Event Donors for your email audience.** Those contacts were ‘recruited’ by the family and friends they donated to, and we (ACS) cannot contact them. 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** 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**.

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*If you have any questions, please open a [Salesforce Case](#)*
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*

9. 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*.

*If you have any questions, please open a Salesforce Case*
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.

*If you have any questions, please open a Salesforce Case*
If you have any questions, please open a Salesforce Case
Search for Participants

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

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.

If you have any questions, please open a Salesforce Case
a. 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.

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**.

*If you have any questions, please open a Salesforce Case*
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:

   If you have any questions, please open a Salesforce Case
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.

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b. **Edit the registration responses**. **Click** Next.

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c. If an offline registration fee was provided, **record the payment**. **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.

*If you have any questions, please open a Salesforce Case*
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.

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.*

*If you have any questions, please open a [Salesforce Case](#)*
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.

*If you have any questions, please open a [Salesforce Case](#)*
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.

If you have any questions, please open a Salesforce Case
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.

Promote or Demote Team Members and Team Captains

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

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

   *If you have any questions, please open a Salesforce Case*
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.

*If you have any questions, please open a Salesforce Case*
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.

If you have any questions, please open a **Salesforce Case**
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.

![Team Member Roster Table]

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.

![Team Members Table]

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.

![Team Gift History Table]

*If you have any questions, please open a Salesforce Case*
If you have any questions, please open a Salesforce Case.

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

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.

If you have any questions, please open a [Salesforce Case](#)
Chapter 8: Customer Service – Manage Companies

- Add a Local Company
- Edit the Local Company Details

Add a Local Company

If you have company 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.

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. 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.
      iii. You can skip questions 3-5 (Company Hierarchy Options, Company Priority and Number of Employees)
      iv. *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
      v. Additional Custom Company Detail 1 and 2: Enter any additional information. This information will show up in reporting on the company.
      vi. Internal Staff Contact: Name of the primary contact at the company.
      vii. Volunteer Manager: Name of the volunteer who will work with the company.
      viii. For the Participation Status, check confirmed, you should only complete this process when you have a

If you have any questions, please open a Salesforce Case
sponsor commitment form and the donation associated with that commitment in hand.
ix. Click Next

b. **Identify Company Coordinator:**
   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**

   *If this is a brand new constituent who has never registered online for an American Cancer Society event, or if you are not positive that one of the displayed options is a match, you can create a new constituent 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 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**.

*If you have any questions, please open a Salesforce Case*
4. Follow the progress bar on the left-hand side of the page to edit company information.

5. If you need to edit the local company page content, please log a detailed ticket at helpme.cancer.org.
Chapter 9: Customer Service – Manage Gifts

- Search for Gifts
- Enter Offline Donation Received
- 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.

If you have any questions, please open a Salesforce Case
Enter Offline Donations Received

1. From the EMC, click Customer Service.

2. Under Related Actions on the left side of the page, click Manage Teams, Manage Participant or Record Event Gifts, depending on how the gift should be credited.
   a. If you are crediting it to a team or a participant, the next step will be to search for your team or participant name and click ‘Manage’ in the action column.

3. Under Related Actions on the left side of the page, click Record (Team, Participant or Event) Donation.

4. For Step 1 – Enter Donor Information, enter the donor’s personal information. Only name is required.

5. Click ‘Next’

If you have any questions, please open a Salesforce Case
NOTE: Upon clicking Next, you may see this screen.

If the donor has previously interacted online with an American Cancer Society event, the system will match the participant details you entered with an existing record.

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

If this is a brand new constituent who has never registered online for an American Cancer Society event, or if you are not positive that one of the displayed options is a match, you can create a new constituent and move on by clicking Next.

6. For Step 2 – Configure Gift, specify the following:
   a. Gift Type – defaulted to one time gift
   b. Gift Amount – enter the monetary amount of the single payment or of each payment to be received for the sponsorship level
   c. Do Not Display Amount – check this box if the amount is not to be displayed
   d. Recognition Name – enter the recognition name if it is different than the name on the billing information. Enter “Anonymous” if the donor does not want their name displayed.
   e. Batch ID – enter a value to identify groups of donations processed at the same time
   f. Payment Method – select the method of payment:
      i. Cash
      ii. Check – if you select check, an additional field will display to enter the check number
      iii. Payment Status – If you have the donation in hand, select Confirmed

7. Click Process or Process and Add Another if you have another donation to add to that particular participant, team or event.

If you have any questions, please open a Salesforce Case
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.
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 publically 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.

If you have any questions, please open a Salesforce Case
7. Click **Finish** to save changes to the donation’s appearance in the Honor Roll.

---

**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.

4. Beside the gift you wish to move, click the **Change Soft Credit** link.

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*If you have any questions, please open a **Salesforce Case**.*
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.

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.

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.

Refund a Donation

If you need to refund an online donation, or change/refund an offline donation, please log a detailed ticket at helpme.cancer.org or call 1-800-227-2345, option 2.

Note: Please do not change an offline gift amount as an attempt to correct a gift, as that will lead to discrepancies between website, mobile app and Facebook fundraiser totals.

If you have any questions, please open a Salesforce Case
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.

![Reports page example](image)

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 F 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.

*If you have any questions, please open a Salesforce Case*
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.
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.

*If you have any questions, please open a [Salesforce Case]*
Note: Your prior year event will only appear in this list if you were an Event Manager from that year. If you are new to the role of Online Chair and did not have access to the Event Manager Center previously, please contact your staff partner 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 [http://relayforlife.org/emc_access](http://relayforlife.org/emc_access) 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.**

If you have any questions, please open a [Salesforce Case](https://example.com/salesforce_case)
Appendix B: Sponsor name (5) customization

Sponsor name (5) can be utilized to add a live video stream, a local photo album to your Event Photos section, or an Instagram widget to your Event Details section (RFL, MSABC and Active events only).

Access Sponsor name (5):

1. From the EMC, click the Event Center tab and under Related Actions select Edit Event Properties
2. Scroll down to Sponsor name (5)

Use caution when adding codes to Sponsor Name 5. Do not delete any of the existing content that may appear in that field. For many events, the codes in Sponsor Line 5 dictate how the event displays to the public.

Pro Tip: Copy and paste any content from Sponsor Name 5 into a word doc, so if you accidentally delete anything you can easily re-add the codes.

Add Your Link:

Photo Feed:

1. Add the Flickr album ID to Sponsor name (5)
   a) Create an account at www.Flickr.com
   b) Add photos. All Photos added will show up on the Photostream Page on Flickr. Photos must be public in order for others to view them.
   c) Navigate to your Photostream and copy and paste the URL (https://www.flickr.com/photos/username/)
   d) Then, Go to http://idgettr.com/ to get your Flickr ID Number.
   e) Your ID should look like : 127335874@N04
   f) Copy and paste your ID into Sponsor line 5

Live Stream:

1. Use the following coding based on where you are streaming:
   a. Facebook: fbVideo=your-video-link-here
   b. YouTube: youtubeVideo=your-video-link-here
   c. Twitch: twitch=your-channel-link-here

2. Click here for detailed instructions to add a live stream to your Greeting page

If you have any questions, please open a Salesforce Case
**Instagram Widget:** *(RFL, MSABC and Active & Community events only)*

You can add a direct link to your event’s Instagram account in your event details section. 

1. Use the following coding to add your Instagram account URL:
   a. `igIcon=your-channel-link-here`

```
12. Sponsor name (5):

   igIcon=https://www.instagram.com/americancancersociety/
```

**Adding Multiple Links:**

You can add a combination of codes above to customize your greeting page. Simply separate the different codes with a comma.

Example:

```
127335874@N04,fbVideo=https://www.facebook.com/RelayForLife/videos/664378951013350/,igIcon=https://www.instagram.com/americancancersociety/
```

*If you have any questions, please open a [Salesforce Case](#)*
Appendix C: Manage Event Library

- Access Event Library
- Upload a Document to the Library
- Upload an Image to the Library

Access Event Library

Before adding the photos or documents onto your event emails, you must first upload them to your event library.

1. From the EMC, click Event Center in the top Navigation Bar and under Related Actions select Manage Event Library.
2. Within the Event Library, you can manage documents and images by selecting the appropriate tab.

Upload a Document to the Library

1. From the Documents List tab, click Upload New Document.

If you have any questions, please open a Salesforce Case.
2. **Browse** to find the document on your computer.

3. Click **Upload** and **Next** once you selected the document you would like to add to the library.

4. Provide information about your document by specifying the following:
   a. **Document Title** – The title will help you identify the document file in the Event Library.
   b. **Description** – Describe the purpose and content of the document file.
   c. **Keywords** – Keywords will help you locate the document when searching the library. When choosing keywords, use words that will make it easy to find document in the future if you cannot remember the name of the document.

5. Click **Finish** and the document will be added to your library.

6. Once a document is uploaded, there are a few options available for the management of your document library:

   If you have any questions, please open a **Salesforce Case**
a. **Edit**: Change the document title, description, and keywords.
b. **Manage**: Upload and activate a new version of your document. You can also view prior versions of the document and make those versions active if needed. The versioning allows for easy replacement of documents when small changes are made without having to edit any links within your webpage.
c. **Download**: Download a file in the library to your computer.
d. **Archive**: Archiving the document will make the file inactive and removes it from your document list view. You can choose to view archived items by selecting the Show Archived Documents in List checkbox at the bottom of the page. **Caution**: *If you archive a document all links to that document will be broken.*

### Upload an Image to the Library

1. From the EMC, click **Event Center** and under Related Actions select Manage Event Library.

2. From the **Image List** tab, click **Upload New Image**.

3. To identify your image, specify the following:
   a. **Image Title**: The title will help you identify the image file in the Event Library
   b. **Alternate Text**: Alternative text helps identify the content or purpose of the image.
   c. **Browse** to find the image on your computer.

*If you have any questions, please open a Salesforce Case*
4. Click **Upload**. Once your image has completed uploading it will display at the bottom of the page.

5. Select **Finish** and the image will be added to your library.

6. Once an image is uploaded there are a few options available for the management of your image such as:

   a. **Edit**: Change the image title, alternate text, or replace the image.
   b. **Archive**: Archiving the image will make the file inactive and removes it from your image list view. You can choose to view archived items by selecting the **Show Archived Images in List** checkbox at the bottom of the page.
   c. **Preview**: Preview the image as it would appear online.

*If you have any questions, please open a Salesforce Case*
Appendix D: Online Email Campaign Best Practices

Email messaging is an essential component 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 current 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 Online Chair 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 you have any questions, please open a Salesforce Case*
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

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 event 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 Details page, and link to it 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 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.
• 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 event.

Highlight where the money goes!
• Use coaching emails to communicate the research and patient programs and services offered by the American Cancer Society.
• The Publicity Chair and/or Online Promotional Chair can 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

If you have any questions, please open a Salesforce Case
- 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.

*If you have any questions, please open a Salesforce Case*
Appendix E: 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.

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).

*If you have any questions, please open a Salesforce Case*
b. **Participant Emails:** Filter the recipients based on the number of emails they have sent from their dashboard!

![Image of Participant Email Filters]

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 **Salesforce Case**
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.

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*If you have any questions, please open a *Salesforce* Case*
Appendix F: Event Management Center Report Guide

The list below is a representation of various reports available in the EMC. The reports you see on your website may vary based on program type.

**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.

**07 Luminaria Report**
Luminaria Report: Includes donor name, donation date, donation amount, participant or team credited, tribute name, and tribute type. **DOES NOT include Luminaria Gifts entered via OLER.

**08 Participant S only Report**
Includes contact information, team affiliation, fundraising totals for all registered participants. Will only show participants that are potential S participants

**09 Coaching Email performance**
Results on coaching Email by message. Includes click through rates and number of emails sent.

**OLER Reports**
- OLER Donation Report (Only shows offline donations for event)
- OLER Upload - Event Gifts
- OLER Upload - Participant List
- OLER Uploads - Team List

*If you have any questions, please open a [Salesforce Case]*