



# 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.

Last Updated: April 2024

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

# THE PARTICIPANT EXPERIENCE

## Table of Contents

|   |           |
|---|-----------|
| <b>Chapter 1: Society Account</b> -----   | <b>6</b>  |
| <i>Creating a New Society Account</i>   | 6         |
| <i>Logging in to Your Existing Society Account</i>  | 8         |
| <i>Manage Your Society Account</i>  | 9         |
| Update Your Basic Information   | 9         |
| Update Your Login Preferences   | 9         |
| Update your Email Preferences   | 10        |
| <b>Chapter 2: Sign Up</b> -----   | <b>11</b> |
| <i>Start a New Team</i>   | 11        |
| <i>Bring Back a Returning Team</i>  | 14        |
| <i>Join a Team</i>  | 16        |
| <i>Register as an Individual</i>  | 19        |
| <b>Chapter 3: Onboarding Guide</b> -----  | <b>22</b> |
| <i>Onboarding Experience</i>  | 22        |
| <i>Team Captain Onboarding Experience</i>   | 22        |
| <i>Personal Fundraising Page Onboarding Experience (Team Member or Solo Participants)</i> | 22        |
| <i>“Share My Page” Experience (Team Captain, Team Member or Solo Participant)</i>         | 22        |
| <i>Image Components</i>   | 23        |
| <i>Story Components</i>   | 23        |
| <i>Sharing Components</i>   | 23        |
| <b>Chapter 4: Participant Dashboard</b> -----   | <b>24</b> |
| <b>Chapter 5: Team Captain Dashboard</b> -----  | <b>26</b> |
| <b>Chapter 5: Manage Your Personal/Team Page</b> -----                                    | <b>28</b> |
| <i>Edit Your Personal/Team Page</i>   | 28        |
| Add Profile Photo   | 28        |
| Add Photos and Video  | 28        |
| Update Title and Description  | 29        |
| Edit Your Story   | 29        |
| <i>Update Your Personal/Team Goal</i>   | 29        |
| <b>Chapter 7: Emailing From Your Dashboard</b> -----                                      | <b>30</b> |
| <i>Compose a New Message</i>  | 30        |
| <i>Thank Your Donors</i>  | 32        |
| <b>Chapter 8: Manage Your Contacts</b> -----  | <b>32</b> |
| <i>Manage Your Address Book</i>   | 32        |

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

|                                       |           |
|---------------------------------------|-----------|
| <i>Create an Email Group</i>          | 33        |
| <b>Chapter 9: Donate Online</b> ----- | <b>35</b> |
| <i>Make an Online Donation</i>        | 35        |

## THE EVENT MANAGER EXPERIENCE

|   |           |
|---|-----------|
| <b>Chapter 1: Access the Event Management Tools</b> ----- | <b>37</b> |
| <i>Log in as Event Manager</i>                            | 38        |
| <i>Event Manager View of Website</i>                      | 38        |
| <i>Access the Event Management Center</i>                 | 38        |
| <i>Access the Website Editing Tools</i>                   | 39        |
| <b>Chapter 2: Event Center Customization</b> -----        | <b>40</b> |
| <i>Edit Event Center</i>                                  | 40        |
| <i>Edit Event Options</i>                                 | 40        |
| <i>Edit Event Properties</i>                              | 40        |
| <i>Edit Event Coordinator Properties</i>                  | 41        |
| <i>Edit Milestones</i>                                    | 42        |
| <b>Chapter 3: Edit Greeting Page</b> -----                | <b>43</b> |
| <i>Using the Edit Tool</i>                                | 43        |
| <i>Change Your Banner Image</i>                           | 43        |
| <i>Edit Content Blocks</i>                                | 43        |
| <i>Edit Event Announcements</i>                           | 44        |
| <i>Sort and Hide Sections</i>                             | 44        |
| <i>Add Local Forms &amp; Documents</i>                    | 44        |
| <i>Add Local Sponsors</i>                                 | 45        |
| <i>Add Custom Content</i>                                 | 46        |
| <i>Add Event Photos</i>                                   | 46        |
| <b>Chapter 4: Edit and Create Content Pages</b> -----     | <b>47</b> |
| <i>Using the Edit Tool</i>                                | 47        |
| <i>Create a Custom Page</i>                               | 47        |
| <i>Manage Custom Pages</i>                                | 48        |
| <i>Customize Your Page</i>                                | 48        |
| <i>Edit Event Details Page</i>                            | 49        |
| <i>Edit Local Sponsors Page</i>                           | 50        |
| <b>Chapter 5: Event Emails</b> -----                      | <b>51</b> |
| <i>Create and Customize a New Email</i>                   | 51        |
| <i>Copy a National Email Template to Customize</i>        | 54        |

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

|   |           |
|---|-----------|
| Customize your newly copied message                                 | 56        |
| <i>Insert Documents and Photos</i>                                  | 58        |
| Insert a Document Link into an Email                                | 58        |
| Insert an Image into an Email                                       | 59        |
| <i>Send your Local Message</i>                                      | 60        |
| Send an Engagement Email to Current Event Participants              | 61        |
| Send a Recruitment Email to Prior Event Participants                | 63        |
| <i>Review Sent and Scheduled Messages</i>                           | 65        |
| <b>Chapter 6: Customer Service – Manage Participants</b> -----      | <b>67</b> |
| <i>Search for Participants</i>                                      | 67        |
| <i>View a Participant’s Gift History</i>                            | 68        |
| <i>Edit the Registration Information of a Participant</i>           | 69        |
| Update a Participant’s Basic Registration Information               | 69        |
| Delete a Participant’s Online Registration                          | 71        |
| Make a Participant’s Registration Private                           | 72        |
| <i>Edit the Team Information of a Participant</i>                   | 74        |
| Move a Participant to a Team  | 74        |
| Create a New Team with a Participant as Team Captain                | 74        |
| Promote or Demote Team Members and Team Captains                    | 75        |
| <b>Chapter 7: Customer Service – Manage Teams</b> -----             | <b>77</b> |
| <i>Search for a Team</i>  | 77        |
| <i>View Team Member Roster</i>                                      | 78        |
| <i>View a Team’s Gift History</i>                                   | 78        |
| <i>Edit a Team’s Registration Information</i>                       | 79        |
| <b>Chapter 8: Customer Service – Manage Companies</b> -----         | <b>81</b> |
| <i>Add a Local Company</i>  | 81        |
| <i>Edit the Local Company Details</i>                               | 82        |
| <b>Chapter 9: Customer Service – Manage Gifts</b> -----             | <b>84</b> |
| <i>Search for Gifts</i>   | 84        |
| <i>Enter Offline Donations Received</i>                             | 85        |
| <i>Change the Honor Roll Name on a Participant’s Page</i>           | 87        |
| <i>Move the Credit of a Donation to another Participant or Team</i> | 88        |
| <i>Refund a Donation</i>  | 89        |
| <b>Chapter 10: Reports</b> -----                                    | <b>90</b> |
| <i>Access Reports</i>   | 90        |
| <i>Run and Download Reports</i>                                     | 90        |
| <i>Utilizing the Report Results Tab</i>                             | 91        |
| <i>Accessing Past Event Manager Centers and Reports</i>             | 92        |

# APPENDICES

|  |            |
|--|------------|
| <b>Appendix A: EMC Access for Staff and Volunteers</b>                       | <b>94</b>  |
| <b>Appendix B: Sponsor name (5) customization</b>                            | <b>95</b>  |
| <i>Access Sponsor name (5):</i>  | 95         |
| <i>Add Your Link:</i>  | 95         |
| Photo Feed:  | 95         |
| Live Stream:   | 95         |
| Instagram Widget: <i>(RFL, MSABC and Active &amp; Community events only)</i> | 96         |
| <i>Adding Multiple Links:</i>  | 96         |
| <b>Appendix C: Manage Event Library</b>                                      | <b>97</b>  |
| <i>Access Event Library</i>  | 97         |
| <i>Upload a Document to the Library</i>                                      | 97         |
| <i>Upload an Image to the Library</i>  | 99         |
| <b>Appendix D: Online Email Campaign Best Practices</b>                      | <b>101</b> |
| <i>Email “Rules”</i>   | 101        |
| Why event emails must be sent from the Online Email Tool                     | 101        |
| ACS Privacy Policy   | 101        |
| The CAN-SPAM Act: Requirements for Emailers                                  | 102        |
| <i>Best Practices</i>  | 102        |
| <b>Appendix E: Email Filtering</b>   | <b>105</b> |
| <i>Participant Filters:</i>  | 105        |
| <i>Team Filters</i>  | 106        |
| <b>Appendix F: Event Management Center Report Guide</b>                      | <b>107</b> |
| 01 Event Snap Shot Report  | 107        |
| 02 Team Summary Report   | 108        |
| 03 Participant Report  | 108        |
| 04 Participant Emails Sent (Date Range Report)                               | 108        |
| 05 Online Donation Report with adjustable date range                         | 108        |
| 06 Donation Report   | 108        |
| 07 Luminaria Report  | 108        |
| 08 Participant S only Report   | 108        |
| 09 Coaching Email performance  | 108        |
| OLER Reports   | 108        |

# THE PARTICIPANT EXPERIENCE

## Chapter 1: Society Account

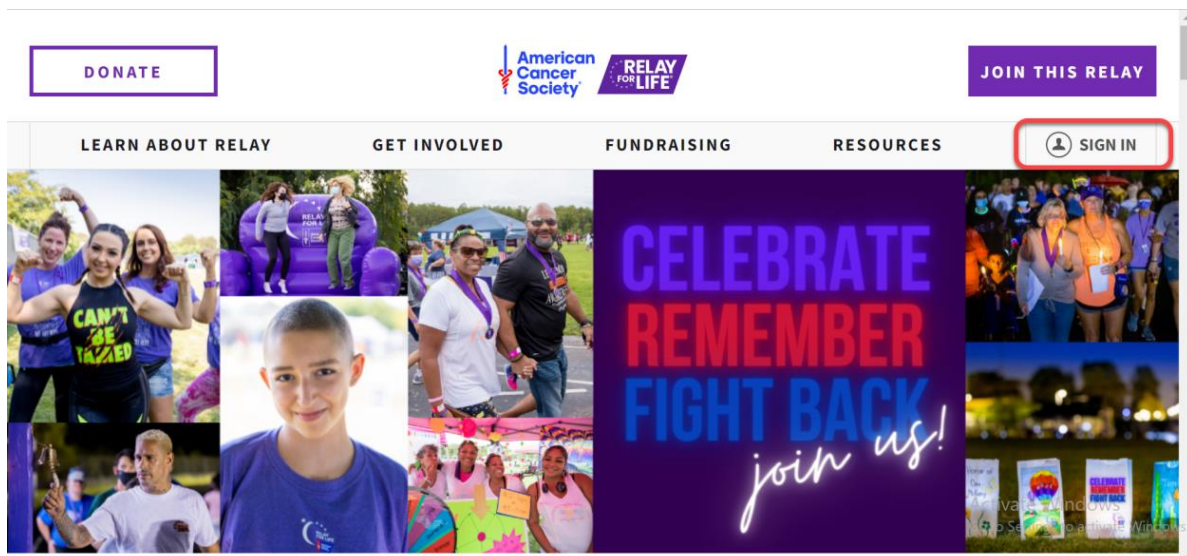
- [Creating a New Society Account](#)
- [Logging in to Your Existing Society Account](#)
- [Managing your Society Account](#)

### 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](#).*

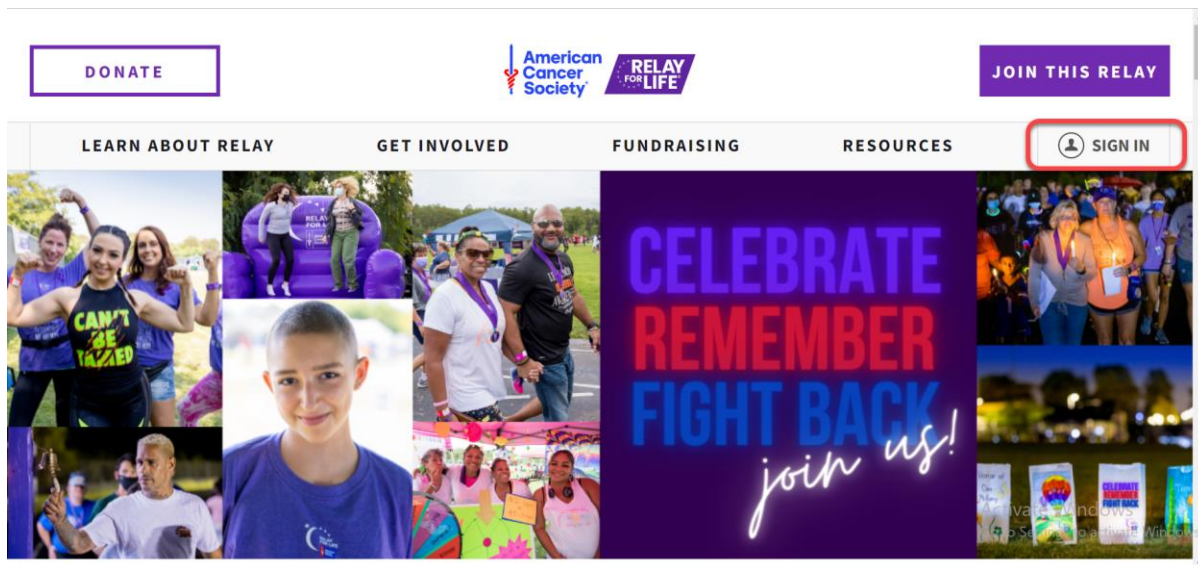
4. You can choose to create your new account using our social login feature OR using your email address.
  - a. **Note:** If you choose to create an account with your email address, it must be a unique email address, not used by another ACS online event participant. Enter the required information and **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.

A screenshot of the 'Log In' form on the American Cancer Society website. The form is titled 'Log In' and includes a link for 'CREATE AN ACCOUNT' for new participants. It offers two login methods: 'Log in with your social account' (with buttons for Facebook, Google, and Yahoo) and 'Or, log in with your email or username'. The second method includes input fields for 'Email or Username' and 'Password', a 'LOG IN' button, and a 'Forgot password?' link. A 'Need help? Please visit our FAQ.' link is also present at the bottom.

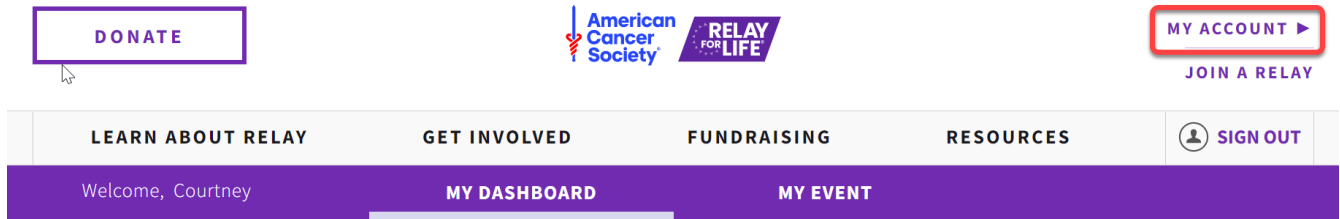
If you have any questions, please open a [Salesforce Case](#).



## Manage Your Society Account

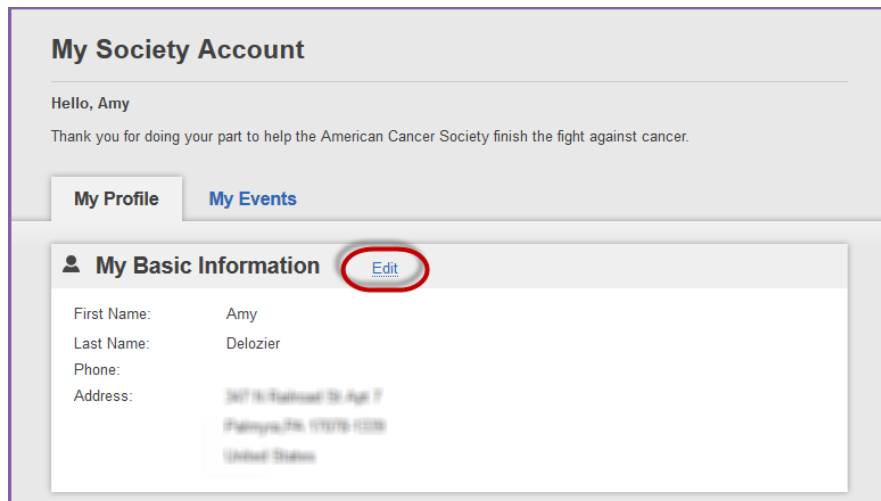
Log into your Society Account

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



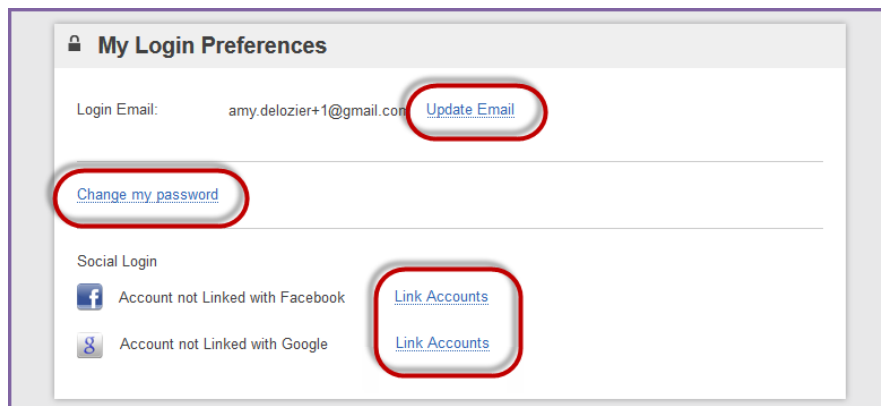
## Update Your Basic Information

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



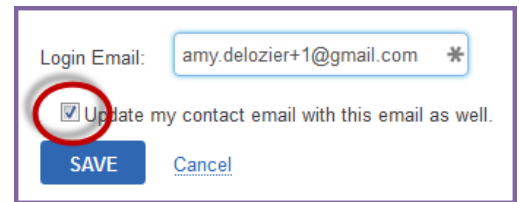
## Update Your Login Preferences

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.*



Login Email: amy.delozier+1@gmail.com \*

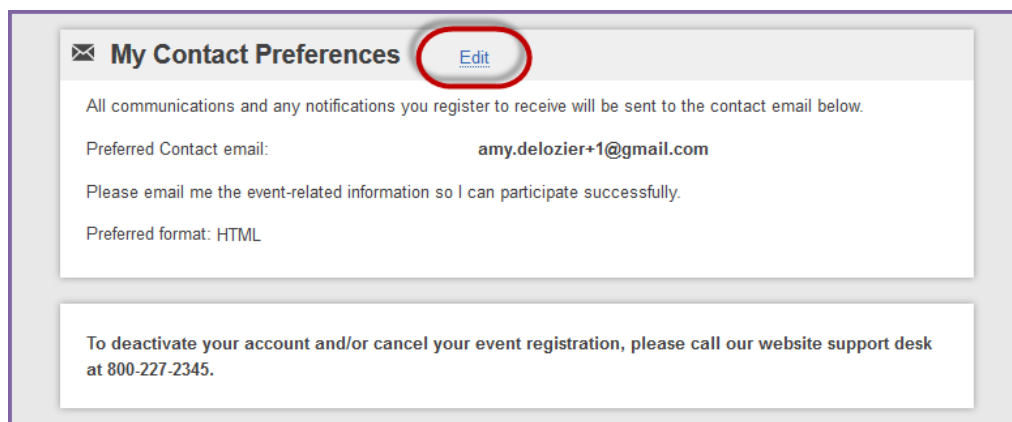
Update my contact email with this email as well.

SAVE Cancel

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.



✉ **My Contact Preferences** [Edit](#)

All communications and any notifications you register to receive will be sent to the contact email below.

Preferred Contact email: amy.delozier+1@gmail.com

Please email me the event-related information so I can participate successfully.

Preferred format: HTML

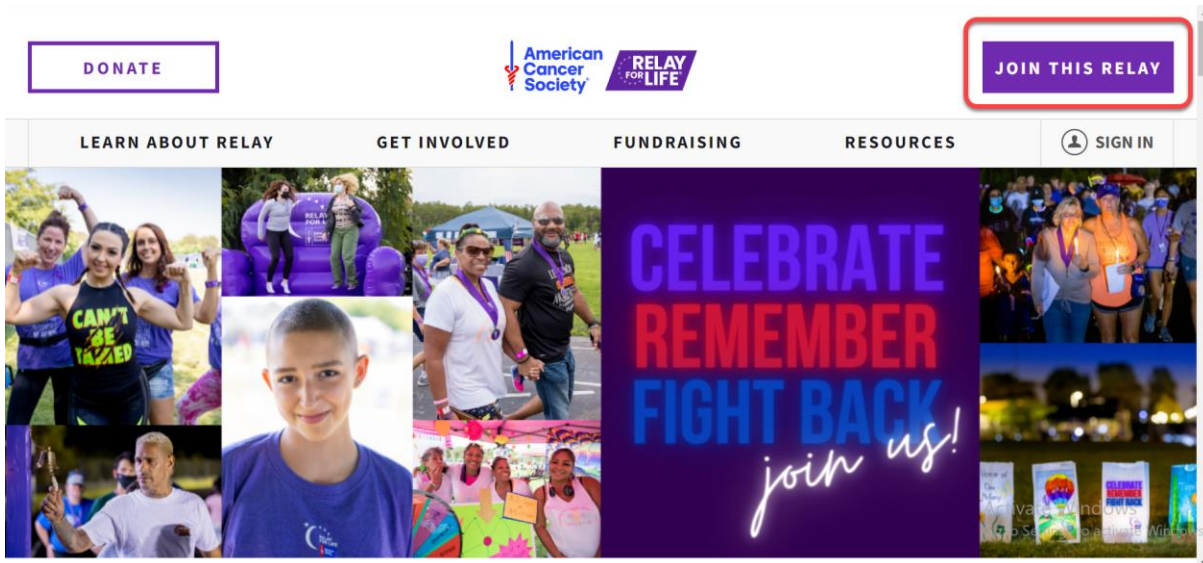
To deactivate your account and/or cancel your event registration, please call our website support desk at 800-227-2345.

## 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)

A screenshot of the Relay for Life registration page for Hope City. The page features a header with the American Cancer Society and Relay for Life logos, a 'Need assistance? 1.800.227.2345' link, and a 'Back to previous page' link. The main content area shows a registration form with the following text: 'Welcome! Let's get you signed up for Relay For Life of Hope City. Provide your email address to log in or sign up, or continue with a social account.' Below this is an 'Email Address' input field with a 'NEXT' button. There are also three social media login options: 'Continue with Facebook', 'Continue with Apple', and 'Continue with Google'. The background of the page shows a photo of Relay for Life lanterns at night, with one lantern having a handwritten note that says 'In Honor of my Mom'.

4. Once you have logged into registration, update **Your Fundraising Section**.

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


- 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**.

RELAY FOR LIFE OF  
**HOPE CITY**  
Saturday, November 19, 2022 | Gnomes AK


Hey there, Courtney . Thanks for joining our mission!

**Your Fundraising**


We all join Relay for a reason. What drives you? (select all that apply)



I have had cancer or am currently living with cancer.  
You're the heart of our Relay community.



I am or have been a caregiver or supporter for someone with cancer.  
Thank you for your continued support of the cancer community.



I want to do my part in the fight against cancer.  
Thank! You're in the right place.

I prefer not to say

---

**\*What's your fundraising goal?**  
When you gather donations from your friends and family, you help support cancer research and resources for patients, caregivers, and survivors.

A big goal can make a big impact. Every \$100 we raise can fund a Hope Lodge stay for a patient and caregiver.

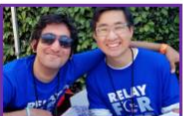
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Will you make the first donation toward your goal?


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

**Your Team**


**\*How do you want to Relay?**  
Starting a team is the best way to go – call up your family and friends and do good together! You can also join an existing team or participate solo if that's your style.



**Start a team**  
Way to be a leader!



Join a team



Participate solo

**\*Team Name**

Relay Friends

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

**Your Contact Information**

Are you under the age of 18?  
 Yes  No

Please select if you are under the age of 18

\*Mailing Address

Mailing Address 2 (Optional)

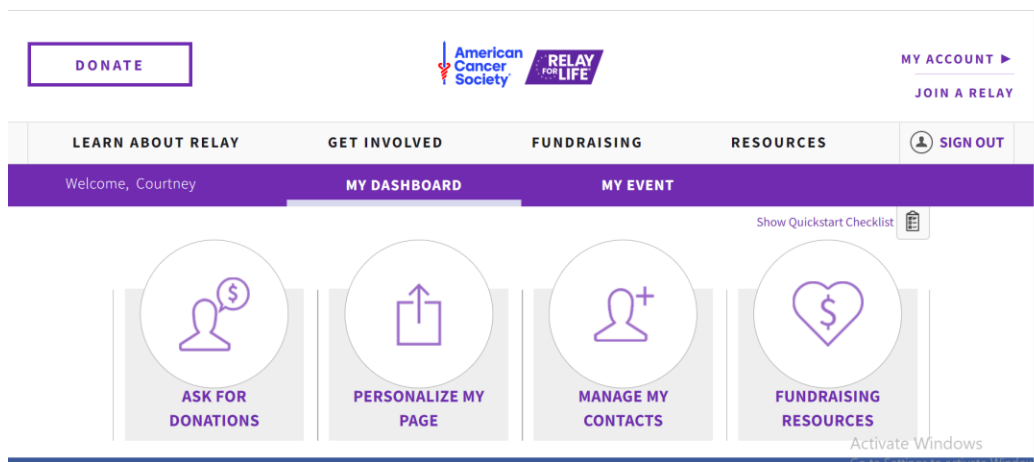
\*Zip Code      \*City      \*State  
           

\*Country

Phone Number (Optional)

Enter mobile number to opt into receive important updates about Relay For Life via text message. Message and data rates may apply.

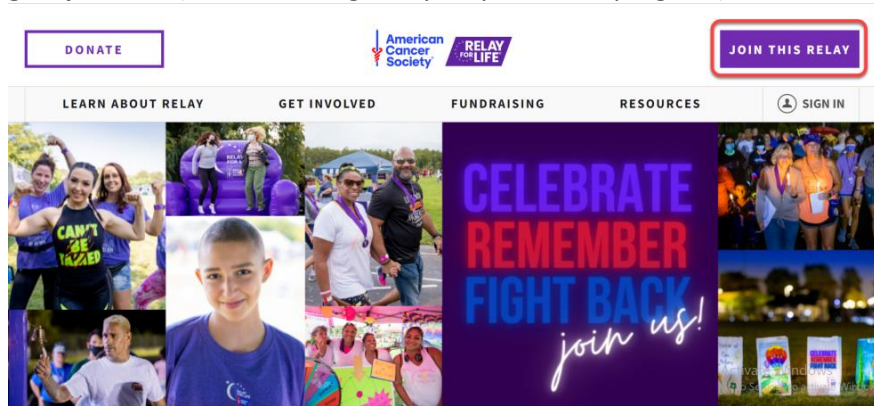
9. Complete the **Registration Form** with your personal information.  
*\*If you are a returning participant, this information should be completed for you. Please be sure to check that all fields are updated for the current year.*
10. If your registration includes a fee, or if you chose to make an additional donation, you will be asked for billing information.
11. Once finished, click **Sign up**.
12. **Your registration is complete.** Your onboarding experience will launch to jumpstart fundraising in 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)

**For your records please write down:**

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](#).*



**RELAY FOR LIFE OF MASTER BLUEPRINT TEST**  
Finalize August 10, 2021, 10:00 AM

Welcome back, Courtney!

We're so happy to see you back for another year of fundraising, community and helping against cancer at Relay. Our community relies on you because of people like you.

We've already got your information from your previous Relay events. Take a look and make sure everything is correct before you register. Remember, you can always change or update this information later.

**Your Fundraising** [SET FUNDRAISING SELECTION](#)

Your Motivation for Participating: I want to make an impact in the fight against cancer.  
Personal Fundraising Goal: \$100

**Your Team** [CHANGE TEAM SELECTION](#)

Team Name: Relay Friends  
Team Role: [Team Captain](#) [Team Member](#)

**Your Contact Information**

Are you under the age of 18?  
 No  Yes

First Name: \*Last Name: \*  
Country: \*Year: \*

\*Mailing Address:  
220 Williams Street Northwest  
Mailing Address (Optional):

\*Zip Code: \*City: \*State: \*  
30303 Atlanta GA

\*Country:  
United States

Phone Number (Optional): \*  
Other mobile numbers to get into mobile equipment updates about Relay For Life via text message. Message and data rates may apply.

[UPDATE CONTACT INFORMATION](#) [CANCEL](#)

**Contribute to Your Goal**

As someone who has participated in Relay For Life of Master Blueprint Test before, we encourage you to renew your commitment by making the first donation toward your \$100 goal.

\$10 \$20 \$30 \$40 \$50 \$100 No Thanks

[MAKE A DONATION](#)

By clicking Register, you're agreeing to the Relay For Life Terms of Service.  
You'll receive email updates from American Cancer Society. You can always unsubscribe.  
Need assistance? Contact us at 1.800.427.2198

8. Your registration is **complete!** Your onboarding experience will launch to jumpstart fundraising in their Dashboard.

[DONATE](#) American Cancer Society RELAY FOR LIFE MY ACCOUNT | JOIN A RELAY

LEARN ABOUT RELAY GET INVOLVED FUNDRAISING RESOURCES SIGN OUT

Welcome, Courtney MY DASHBOARD MY EVENT

Show Quickstart Checklist

ASK FOR DONATIONS PERSONALIZE MY PAGE MANAGE MY CONTACTS FUNDRAISING RESOURCES

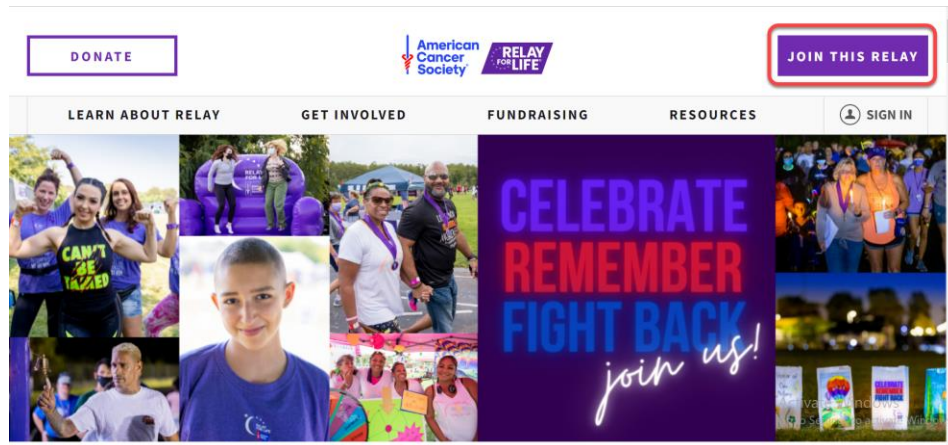
Activate Windows

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)

« [Back to previous page](#)      American Cancer Society RELAY FOR LIFE      Need assistance? 1.800.227.2345

### RELAY FOR LIFE OF HOPE CITY

Saturday, November 19, 2022 | Gnomes AK

Welcome! Let's get you signed up for Relay For Life of Hope City

Provide your email address to log in or sign up, or continue with a social account.

\*Email Address

NEXT

OR

Continue with Facebook    Continue with Apple

Continue with Google

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](#).*


RELAY FOR LIFE OF  
**HOPE CITY**  
Saturday, November 19, 2022 | Gnomes AK


Hey there, Courtney . Thanks for joining our mission!

**Your Fundraising**

We all join Relay for a reason. What drives you? (select all that apply)

 I have had cancer or am currently living with cancer.  
You're the heart of our Relay community.

 I am or have been a caregiver or supporter for someone with cancer.  
Thank you for your continued support of the cancer community.

 I want to do my part in the fight against cancer.  
Thank! You're in the right place.

I prefer not to say

**\*What's your fundraising goal?**  
When you gather donations from your friends and family, you help support cancer research and resources for patients, caregivers, and survivors.

A big goal can make a big impact. Every \$100 we raise can fund a Hope Lodge stay for a patient and caregiver.


Will you make the first donation toward your goal?


**NEXT**


5. Select **Next**
6. Select **Join a team** and enter your **Team Name** in the search field.

**Your Team**

**\*How do you want to Relay?**  
Starting a team is the best way to go – call up your family and friends and do good together! You can also join an existing team or participate solo if that's your style.

 Start a team

 Join a team  
You're part of the movement.

 Participate solo

**\*Let's find your team. What's it called?**

**NEXT**

7. Select **Next**

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

**Your Contact Information**

Are you under the age of 18?  
 Yes  No

**Please select if you are under the age of 18**

\*Mailing Address

Mailing Address 2 (Optional)

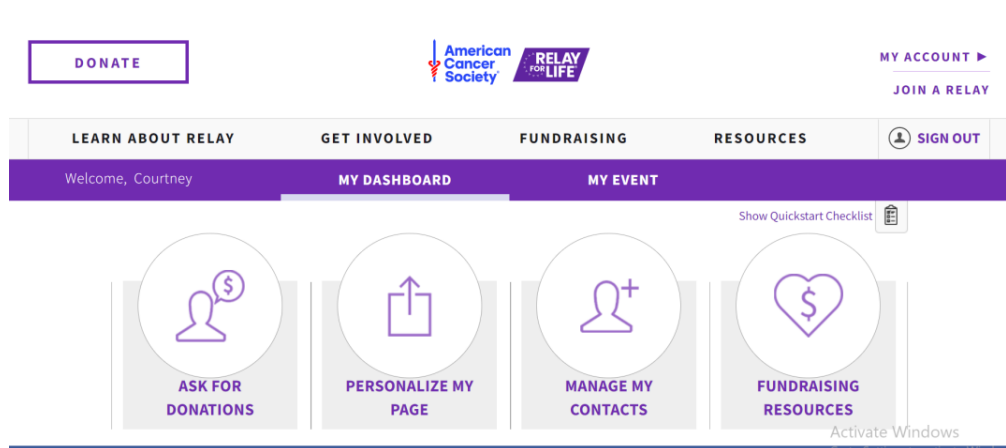
\*Zip Code      \*City      \*State  
           

\*Country

Phone Number (Optional)

Enter mobile number to opt into receive important updates about Relay For Life via text message. Message and data rates may apply.

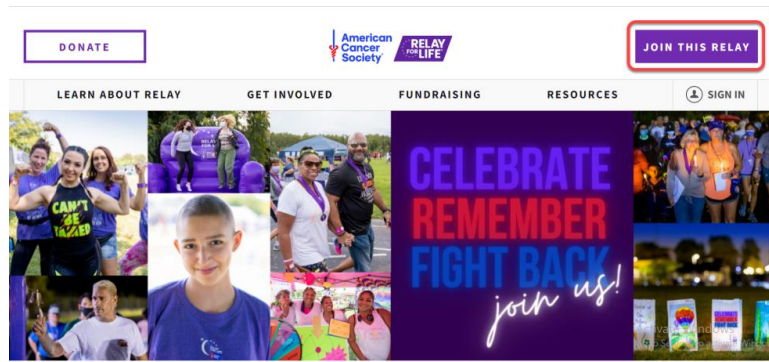
8. Complete the **Registration Form** with your personal information.  
*\*If you are a returning participant, this information should be completed for you. Please be sure to check that all fields are updated for the current year.*
9. If your registration includes a fee, or if you chose to make an additional donation, you will be asked for billing information.
10. Once finished, click **Sign up**.
11. **Your registration is complete.** Your onboarding experience will launch to jumpstart fundraising in 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)

A screenshot of the registration form for Relay For Life of Hope City. The page has a purple header with the event title 'RELAY FOR LIFE OF HOPE CITY' and the date 'Saturday, November 19, 2022 | Gnomes AK'. The main content area is white and contains the following text: 'Welcome! Let's get you signed up for Relay For Life of Hope City. Provide your email address to log in or sign up, or continue with a social account.' Below this is an 'Email Address' input field with a 'NEXT' button to its right. Underneath, there is an 'OR' separator and three social login buttons: 'Continue with Facebook', 'Continue with Apple', and 'Continue with Google'. The background of the page shows a row of glowing paper lanterns, one of which has the handwritten text 'In Honor of my Onc'.

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](#).*

RELAY FOR LIFE OF  
**HOPE CITY**  
Saturday, November 19, 2022 | Gnomes AK

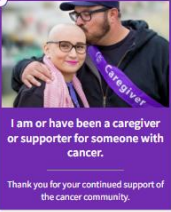
Hey there, Courtney . Thanks for joining our mission!

**Your Fundraising**

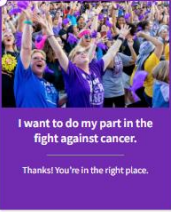
We all join Relay for a reason. What drives you? (select all that apply)



I have had cancer or am currently living with cancer.  
You're the heart of our Relay community.



I am or have been a caregiver or supporter for someone with cancer.  
Thank you for your continued support of the cancer community.



I want to do my part in the fight against cancer.  
Thank! You're in the right place.

I prefer not to say

---

**\*What's your fundraising goal?**  
When you gather donations from your friends and family, you help support cancer research and resources for patients, caregivers, and survivors.

A big goal can make a big impact. Every \$100 we raise can fund a Hope Lodge stay for a patient and caregiver.

---

Will you make the first donation toward your goal?

**NEXT**

5. Select **Next**
6. Select **Participate Solo**.

**Your Team**

**\*How do you want to Relay?**

Starting a team is the best way to go – call up your family and friends and do good together! You can also join an existing team or participate solo if that's your style.



Start a team



Join a team



Participate solo

Thanks for joining us! You can always change your mind later if you decide you want to join a team.

**NEXT**

7. Select **Next**

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

**Your Contact Information**

Are you under the age of 18?  
 Yes  No  
*Please select if you are under the age of 18*

\*Mailing Address

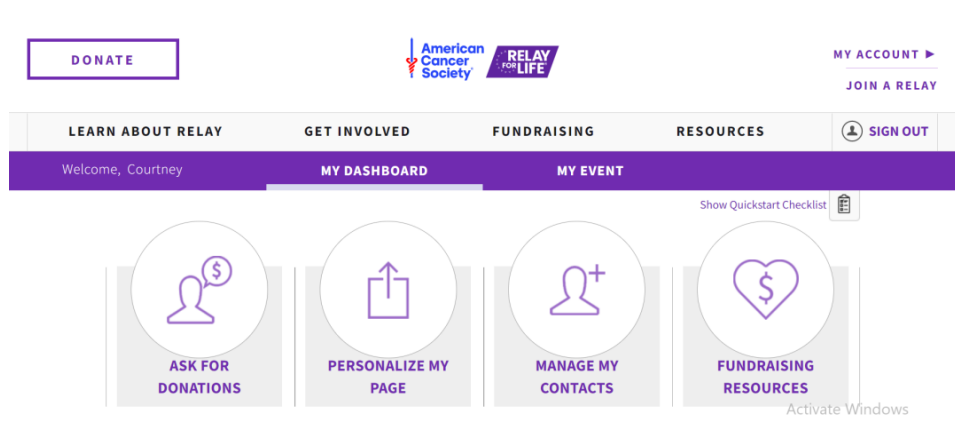
Mailing Address 2 (Optional)

\*Zip Code      \*City      \*State  
           

\*Country

Phone Number (Optional)  
 Enter mobile number to opt into receive important updates about Relay For Life via text message. Message and data rates may apply.

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.** Your onboarding experience will launch to jumpstart fundraising in your Dashboard.



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



## Chapter 3: Onboarding Guide

View the [Onboarding Guide](#) for screenshots of each user experience and onboarding FAQ's.

- [Team Captain Onboarding Experience](#)
- [Personal Fundraising Page Onboarding Experience \(Team Member or Solo Participant\)](#)
- [Share My Page Path](#)
- [Image Components](#)
- [Story Components](#)
- [Sharing Components](#)

### Onboarding Experience

1. After completing your registration, your onboarding experience will launch to jumpstart fundraising in your Dashboard.
2. This experience is available for all programs and on all desktop, mobile and tablet devices.
3. View the [Onboarding Guide](#) for any FAQ's and user experience screenshots.
4. Complete each of the steps in the Onboarding experience to get your personal and team fundraising page ready for success.

### Team Captain Onboarding Experience

1. On the Welcome Screen the user selects "Let's Get Started" button.
2. You will be prompted to share your team's reason for getting involved and fundraising. Click Next.
3. The next prompt is to upload your team's cover photo. Click Next.
4. The third step will prompt you to invite team members to join. Returned Team Captain experience includes additional option to Invite Past Team Members (See more in Sharing Features).
5. You will now see the "All Set Up" prompt where you can share to fundraise and click Next to update your personal fundraising page experience.

### Personal Fundraising Page Onboarding Experience (Team Member or Solo Participants)

1. On the Welcome Screen the user selects "Let's Get Started" button.
2. First step is to share your reason for fundraising by updating your Page Title and Story. Click Next.
3. You will be prompted to upload your profile picture and cover photo, along with the option to add a YouTube video link. Click Next.
4. You will see the "All Set Up!" prompt where you can share your fundraising link through different options or click Next.
  - Selecting Next without clicking a share option will give a gentle nudge to return to share or continue the process.
  - You will see a different "Thank You" screen based on action of sharing page or selecting Continue. Both options exit to the Dashboard.

### "Share My Page" Experience (Team Captain, Team Member or Solo Participant)

1. On the Welcome Screen the user selects "Share my fundraising page" or "Share my team page" link
2. Flow through the sharing prompts to choose how you want to share. Using any of the Share options will show a confirmation screen with the option to exit to the Dashboard.
3. Selecting Next without clicking a share option will give a gentle nudge to return to share or continue the process.

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



4. User will see a different “Thank You” screen based on action of sharing page or selecting Next. Both options exit to the Dashboard.

## Image Components

- Users can upload photos for their Team Fundraising Page (Team Captains only) and Personal Fundraising Pages (all users). These images will update in the Dashboard and on fundraising pages.
- Users can upload an image from a file or choose from their Photo Library or Take Photo from a mobile device.
- Photo editing tool allows user to zoom using mouse or pinch (mobile and tablet), straighten, rotate, or flip image.
- Team captains have the ability to upload 1 JPEG or PNG photo.
- All users have the ability to upload 1 profile photo, 2 JPEG or PNG photos, and provide a link to a YouTube video.
- In order to achieve high image quality- returning participants’ photos from the previous year will not automatically roll over.
- Returning users will see a different tool tip alerting them to this update. See more information in the FAQ section.

## Story Components

- Users can edit a story to appear on their Team Fundraising Page (Team Captains only) and Personal Fundraising Pages (all users). This text content will update in the Dashboard and on fundraising pages.
- Users can edit text by clicking into the text box and format the content using the toolbar.
- Team captains have the ability to edit a story to appear on their Team Page. A default story will appear or the prior year story will carryover for a returning team.
- All users have the ability to update the title of their Personal Fundraising Page which will appear at the top of the page and a story with more content. A default story will appear or the prior year story will carryover for a returning team.

## Sharing Components

- Sharing is the main call-to-action for Onboarding and can be found throughout the experience for both Team Captains sharing their Team Pages for recruitment of team members and for all participants to share their Personal Fundraising Page to ask for donations.
- Returning captains will see the option to Invite Past Team Members opening a checklist of names to select. Clicking Send will open the native email client on the user’s device (i.e. Outlook, Gmail) with the selected email addresses included as a BCC and a subject line and message with a link to the team page populated that the user can edit.
- Choosing the Email icon will open the native email client on the user’s device (i.e. Outlook, Gmail) with a subject line and message with a link to the fundraising page populated that the user can edit.
- Sharing via social media will open the platform with the page link populated and the option for the user to write a post.

# Chapter 4: Participant Dashboard

## My Dashboard

Customize your personal page, manage your communications, and connect to fundraising tools to help you reach your goals.

1. **Create a Facebook Fundraiser** to connect your dashboard fundraising.
2. Add **Company Affiliation** from your dashboard if your company/organization participants in the national/local company program.
3. **Make a short URL** for your fundraising page and share with your friends and family
4. Add a **profile photo** to personalize your page for your donors
5. Add a **personalized title and description** for more storytelling, in addition to your personal story
6. Edit your **personal fundraising goal**
7. **Customize your Personal Page** Add photos and a YouTube link to personalize your fundraising page



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

8

### WHY I RELAY

Participants with personal stories raise **6x more**.

COVID-19 has put cancer patients at risk - attacking already weakened immune systems, delaying cancer treatments, and closing many clinical trials. Because of the impact cancer has had on my life, I'm doing something about it. I've joined Relay For Life to remember people we've lost and offer up support to anyone in our community who is affected by cancer. And that's why I need your support!

The funds I'm raising will help sustain critical research and patient services in this difficult time. Believe me, every dollar really does count, so I'm asking for your help. Please donate today, because together we can accomplish anything!

[VIEW MORE](#)

[MAKE MY PERSONAL PAGE PRIVATE](#) [More Info](#)

### MY DONORS

[My Donors](#)

Be the first to donate!

[DONATE TO MY GOAL](#)

### MY COMMUNICATIONS

9

[Manage Contacts](#) [Compose](#) [Saved Drafts](#) [Sent Emails](#)

IMPORT CONTACTS   ADD CONTACT   MANAGE GROUPS

SELECT ALL   Search   X   EMAIL   ADD TO GROUP   DELETE

| SELECT                   | NAME                 | EMAIL                  | EDIT                 |
|--------------------------|----------------------|------------------------|----------------------|
| <input type="checkbox"/> | Courtney 113 Goodell | cicaldwe+113@gmail.com | <a href="#">EDIT</a> |

VIEW

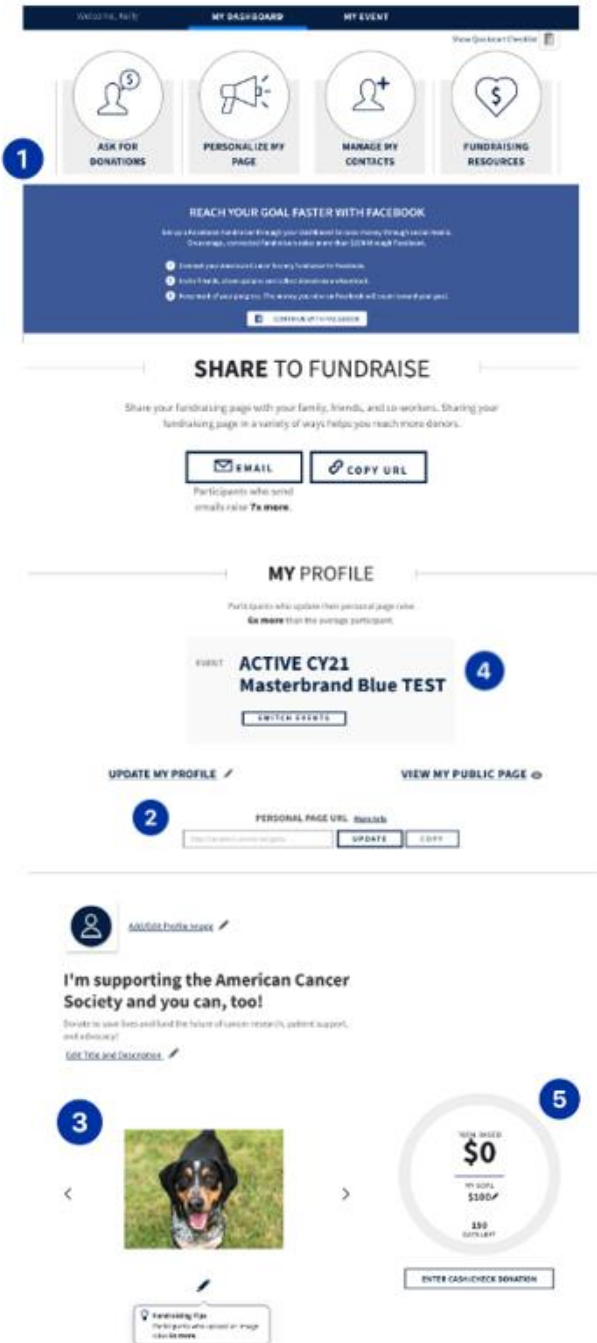
10

### MY BADGES

### My Dashboard continued

- Update your **personal story** and share why you support the American Cancer Society
- View and **thank your donors** and **send emails** to your contacts
- See all available **activity and status badges**- including those you have already earned

# 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!

6

### WHY I SUPPORT THE AMERICAN CANCER SOCIETY

Participants with personal stories raise **6x more**.

**Why I Support the American Cancer Society**  
Cancer has affected so many people I know and love that it's inspired me to join this American Cancer Society event. Taking part in this event gives me the chance to make a difference and honor those touched.

[VIEW MORE](#)

MAKE MY PERSONAL PAGE PRIVATE [NoxInfo](#)

7

### MY DONORS

**My Donors**

Be the first to donate!

[DONATE TO MY GOAL](#)

### MY COMMUNICATIONS

**Manage Contacts** Send an email Saved Drafts Sent Emails

[IMPORT CONTACTS](#) [ADD CONTACT](#) [MANAGE GROUPS](#)







[SELECT ALL](#) Search  [EMAIL](#) [ADD TO GROUP](#) [DELETE](#)

| SELECT                   | NAME ▲      | EMAIL ▲                | EDIT                 |
|--------------------------|-------------|------------------------|----------------------|
| <input type="checkbox"/> | Kelly Vigil | kelly.vigil@cancer.org | <a href="#">EDIT</a> |

[VIEW](#)

8

### MY BADGES

 Donor  Personalized Page  Received Donations  Team Leader  Survivor  Caregiver

9

### FUNDRAISING RESOURCES



**MOBILE APP**  
Participants who use the mobile app raise up to 42% more online than average participants.



**FUNRAISE WITH FACEBOOK**  
Event participants who connect a Facebook Fundraiser raise 6x more than the average participant.



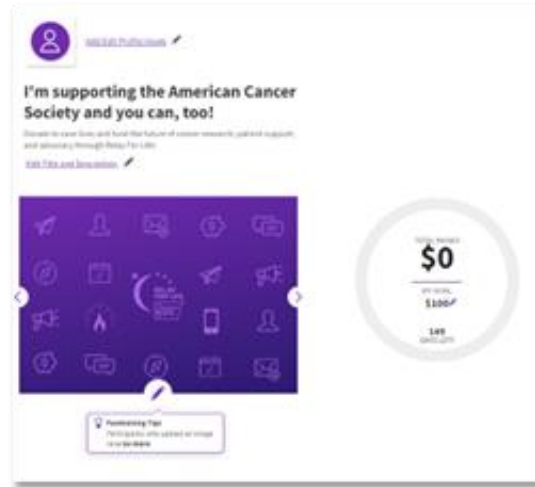
**FUNDRAISING TIPS**  
Not sure how to start fundraising? Check out these helpful tips.

## 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](#)

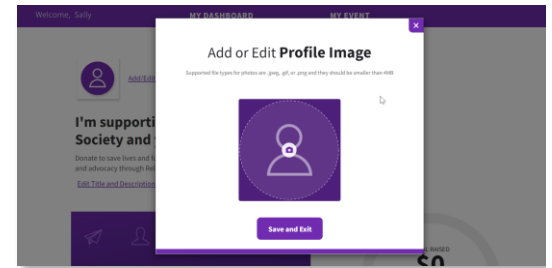
### Edit Your Personal/Team Page

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

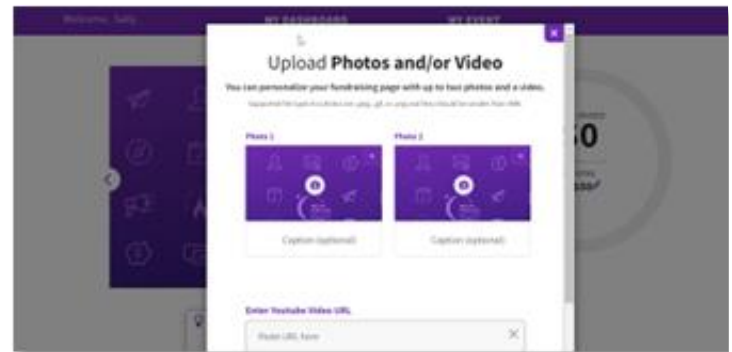
1. Profile Pic – Insert one photo. Supported photos are .jpeg, .gif, or .png and they should be smaller than 4MB.



### 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 images to display on your personal page by uploading a file that contains a digital photograph. You may upload photos up to 4MB.



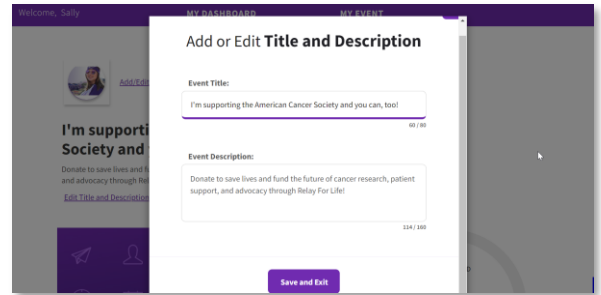
- i. **Browse** – Click the **Select Photo** button to find a photo located on your computer and upload to your personal page.
- ii. **Caption** – Enter a caption for the photo(s) you uploaded to your personal page.
- iii. **Save Changes** – Click to see your new image(s) reflected on the personal page.

#### 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.

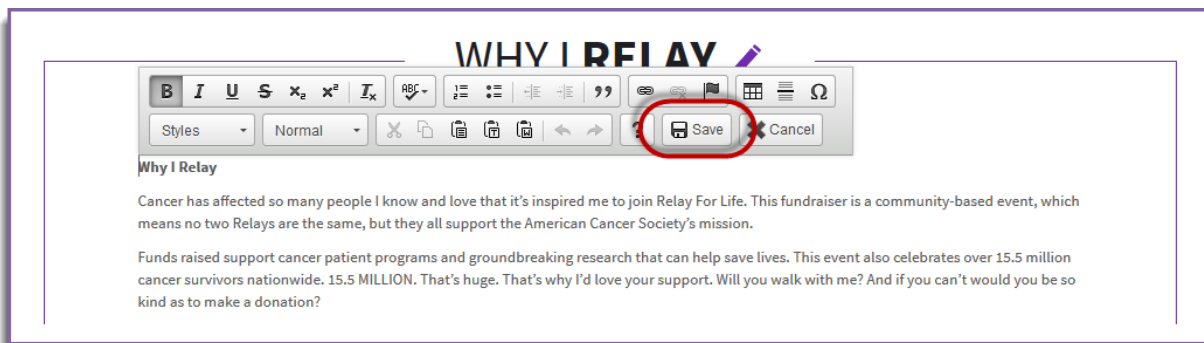
## Update Title and Description

- 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 on the in-page donation form.



## Edit Your Story

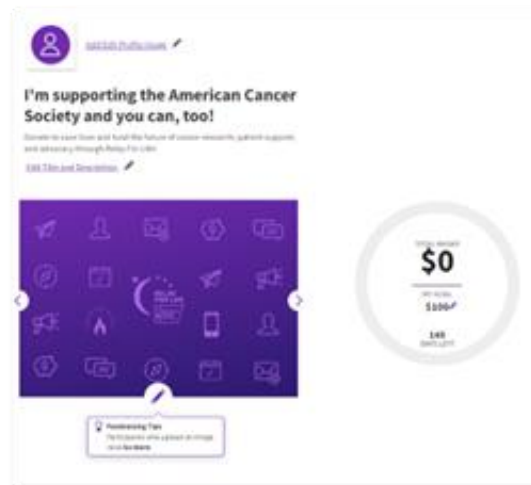
1. Use the text editing tools to edit your story and share why you/your team participate in the event
2. Click Save to make your changes appear



## 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 the your personal/team fundraising goal.

1. Click **Save Changes** once finished.



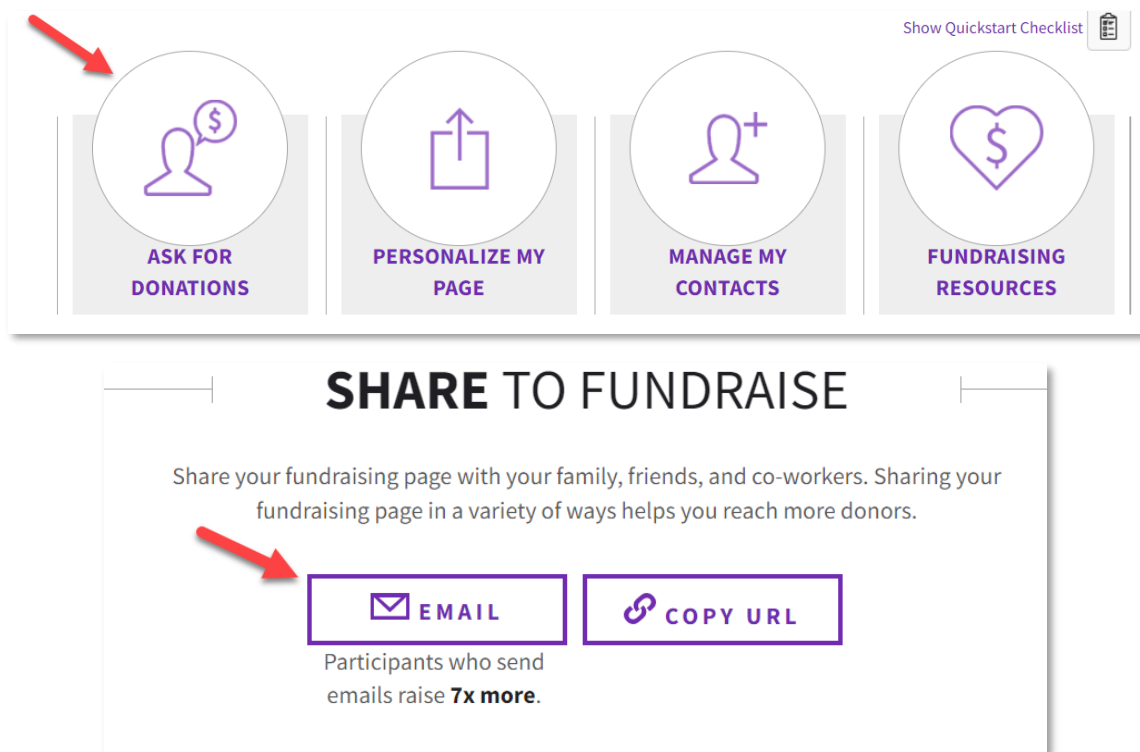


## Chapter 7: Emailing From Your Dashboard

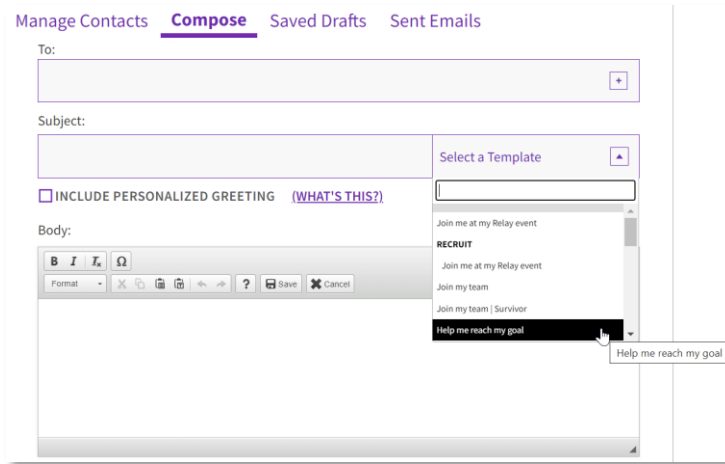
- [Compose a New Message](#)
- [Thank Your Donors](#)

### Compose a New Message

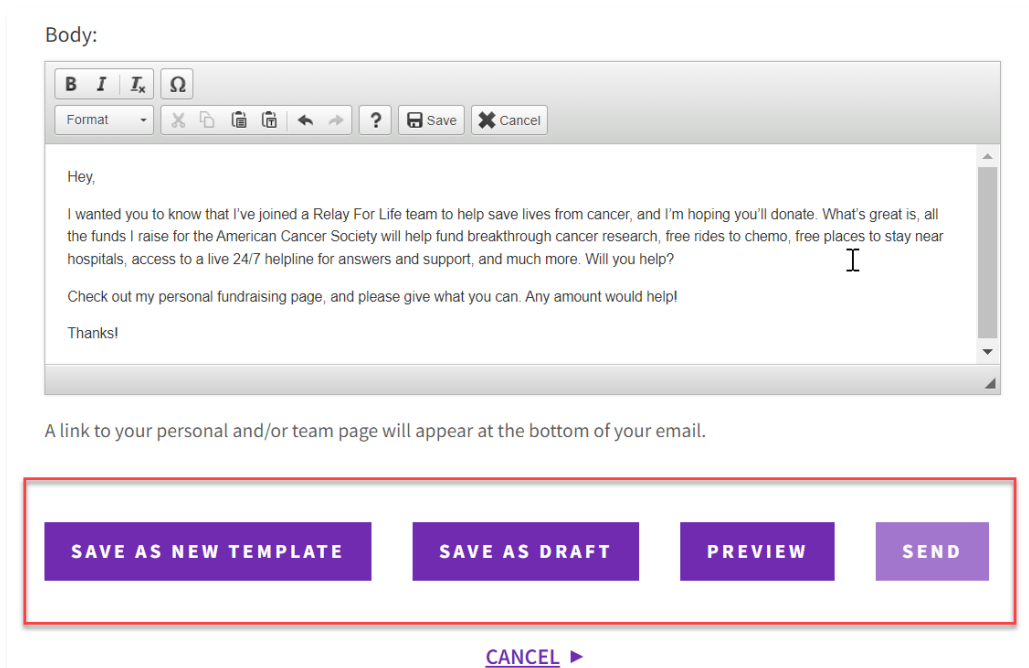
1. Log into your **Dashboard**.
2. Select whether you want to ask for donations, share your page, or invite friends, then select the **Email** icon



3. The email tool will open below:
  - a. Begin typing the names of those you wish to email into the To: field. If email addresses are already in the Address Book, they will begin to auto-populate.
  - b. Click  to **Select Contact(s)** or **Select Group(s)** if you would like to see more options of individuals you may send the message to.
4. If you need help deciding what to write in your email, choose one of the template messages.
  - a. Click on the **Select a template** drop down menu to see the suggested messages available (i.e. Thank a Donor)
  - b. Once you select the template of your choice, the email will appear for you to personalize or send as is.

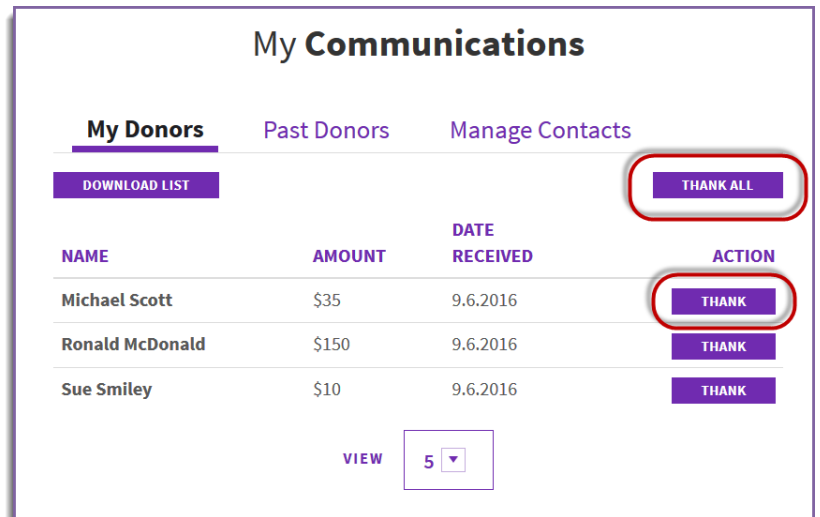


5. Once your email appears the way you wish, there are a few options available:
  - a. **Save As New Template** if this is a message you plan to send multiple times
  - b. **Save As Draft** if you want to send the email at a later time
  - c. **Preview** to see what the email will look like to recipients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



## Thank Your Donors

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



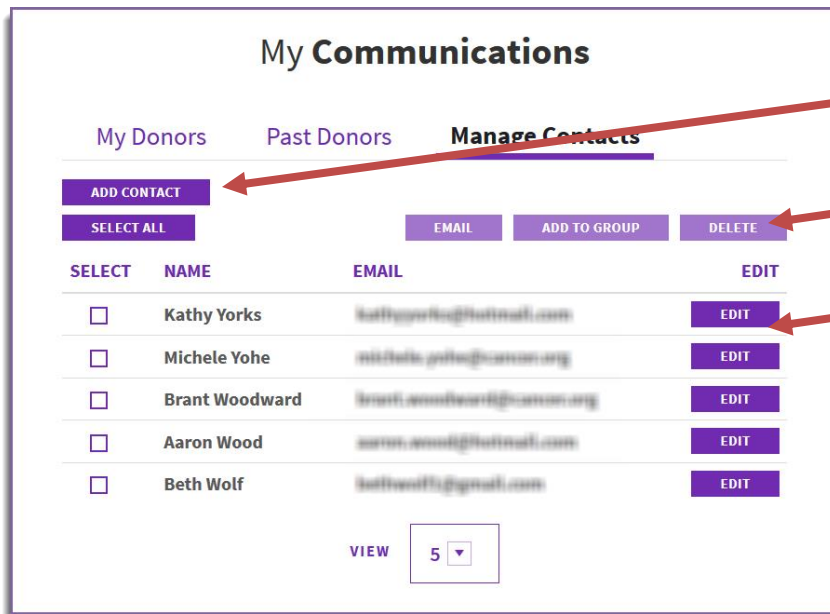
## Chapter 8: Manage Your Contacts

- [Manage Your Address Book](#)
- [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.



4. Within your address book, you can:

Add new contacts

Delete selected contact records

Edit existing contacts

- Add address/phone information
- Update email address
- Add to/remove from email groups

## Create an Email Group

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

1. Log into your **Dashboard**.
2. Scroll down to **My Communications** section of the dashboard, and click **Manage Contacts**
3. Select the contacts you want to add to a group, and click **Add to Group**

The image shows a screenshot of a web application interface titled "My Communications". It has three tabs: "My Donors", "Past Donors", and "Manage Contacts". Under "Manage Contacts", there are buttons for "ADD CONTACT", "SELECT ALL", "EMAIL", "ADD TO GROUP", and "DELETE". Below these is a table of contacts with columns for "SELECT", "NAME", "EMAIL", and "EDIT". The "ADD TO GROUP" button is circled in red. A modal window titled "Add to Group" is open, showing options to "Add to Group" (with a "Select a Group" dropdown) and "Create a Group" (with a "Co-Workers" button). Both have "SAVE" buttons. A "SAVE CHANGES" button is circled in red at the bottom right of the modal. The modal also displays a message: "The selected contacts will be added to these groups" and a "Co-Workers" group with a "remove" link.

| SELECT                              | NAME           | EMAIL                      | EDIT |
|-------------------------------------|----------------|----------------------------|------|
| <input checked="" type="checkbox"/> | Kathy Yorks    | kathy.yorks@hotmail.com    | EDIT |
| <input checked="" type="checkbox"/> | Michele Yohe   | michele.yohe@america.com   | EDIT |
| <input checked="" type="checkbox"/> | Brant Woodward | brant.woodward@america.com |      |
| <input type="checkbox"/>            | Aaron Wood     | aaron.wood@hotmail.com     |      |
| <input type="checkbox"/>            | Beth Wolf      | bethwolf@gmail.com         |      |

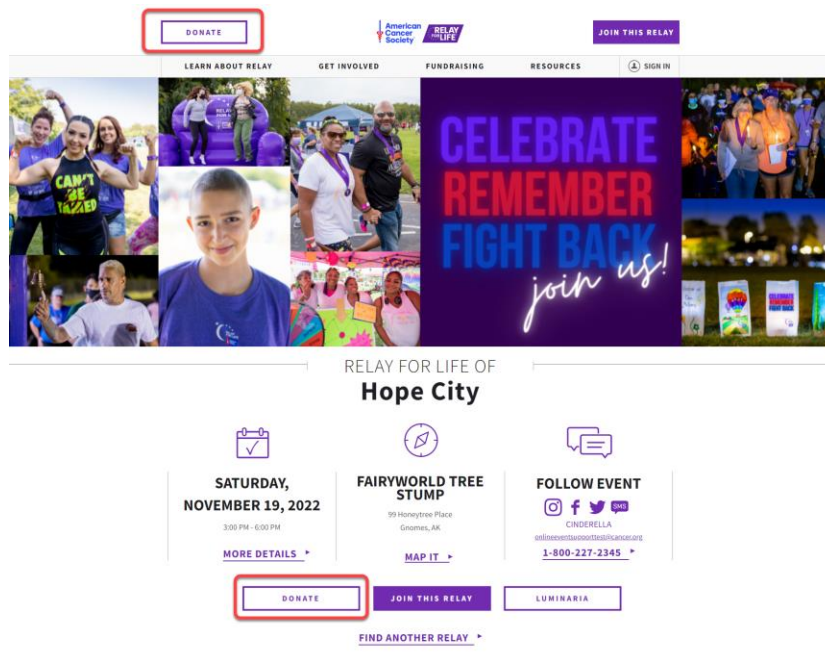
4. Add to an existing group, or create a new group, then click **Save**.
5. When finished, click **Save Changes**.

# Chapter 9: Donate Online

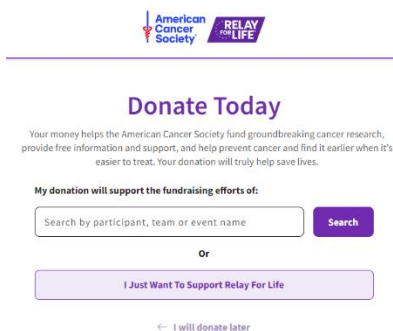
- [Make an Online Donation](#)

## 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



## Gift Credit

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

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



## 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.

## Donate Today

Your money helps the American Cancer Society fund groundbreaking cancer research, provide free information and support, and help prevent cancer and find it earlier when it's easier to treat. Your donation will truly help save lives.

My donation will support the fundraising efforts of:

RFL CV23 Mobile Testing Only

### Your Donation

\*How much would you like to donate?

\$50 **\$100** \$150 \$200 Other \$ Amount

I choose to add \$5.50 to cover service, processing fees, and other expenses to ensure the cause receives more of my contribution.

### Employer Matching

Would you like your Employer to match the gift? If so, please enter your Employer Name below:

Participating Employers

Search company name...

### Payment Details

Select your payment mode

Credit Card  Paypal

### Card Information

First Name\* Last Name\*

Credit Card Number\*

Expiry Date\* CVV\*

### Billing Address Information

Mailing Address\*

Mailing Address 2 (Optional)

Zip Code\* City\*

State\* Country\*

\*Email

Donate \$100

You'll receive email updates from the American Cancer Society. You can unsubscribe at any time. The American Cancer Society respects your privacy. By making your gift, you are accepting the terms of our [Privacy Policy](#)

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



# THE EVENT MANAGER EXPERIENCE

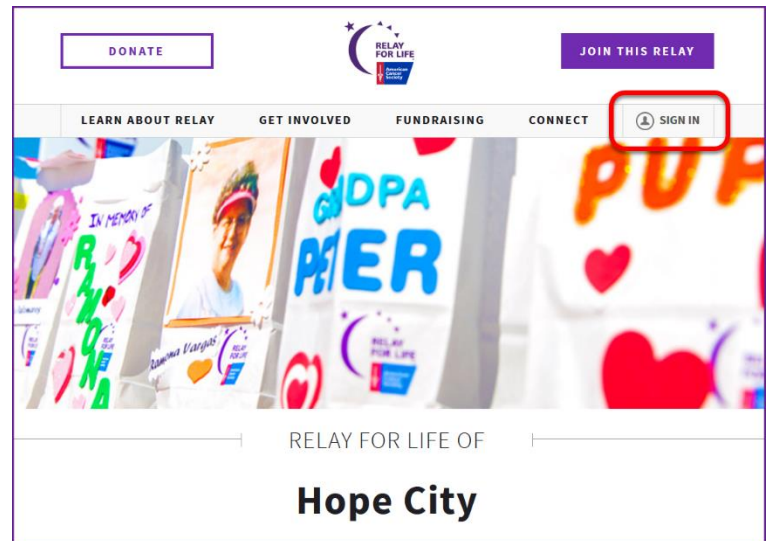
## Chapter 1: Access the Event Management Tools

- [Log in as Event Manager](#)
- [Event Manager View of Website](#)
- [Access the Event Management Center](#)
- [Access Website Editing Tools](#)

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

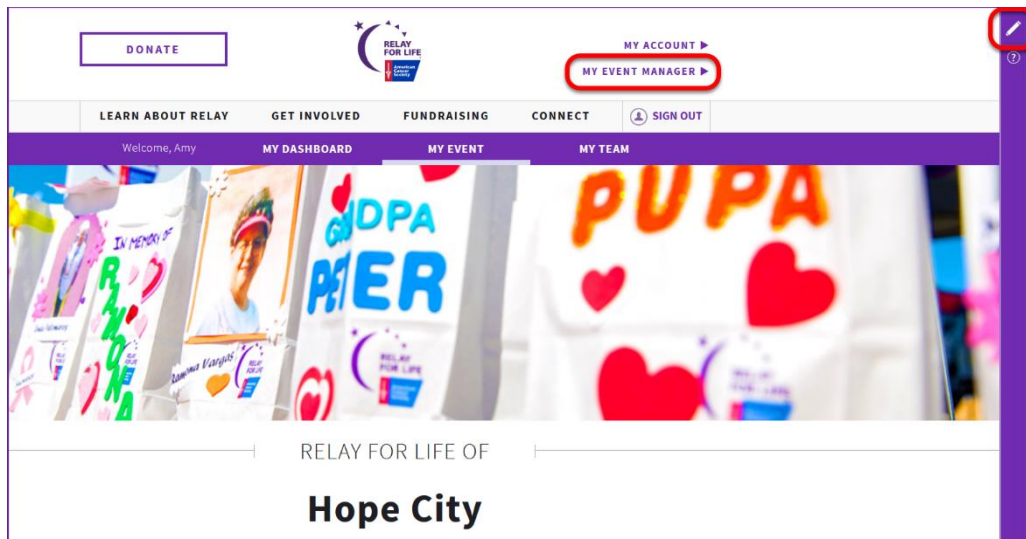
## Log in as Event Manager

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.



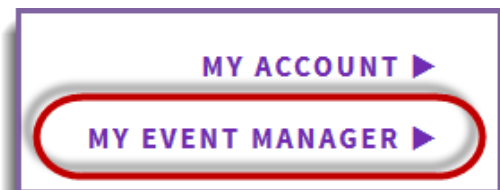
## Event Manager View of Website

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

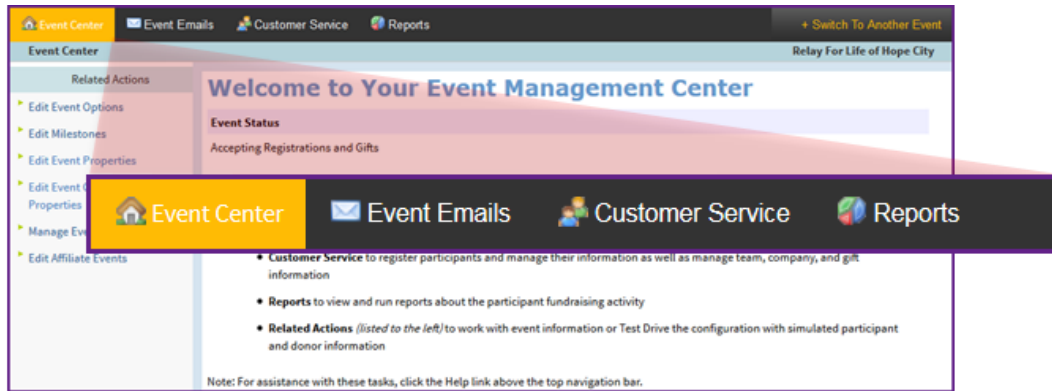


## Access the Event Management Center

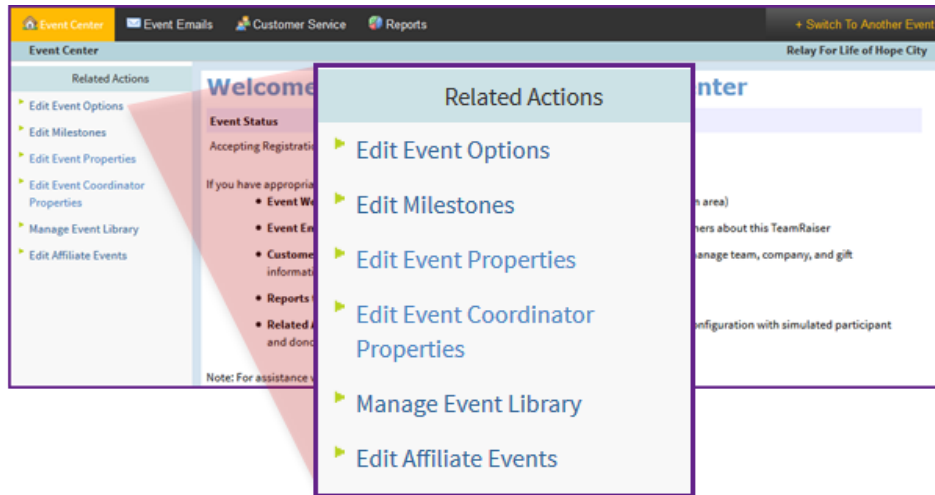
1. Click the **Event Manager** link on the top right side of the page.



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.



## 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>
    - 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.
2. Schedule: Verify the Event Start Time

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

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

The screenshot shows a web form with the following fields:

- 4. Location: Fairyworld Tree Stump
- 5. State: AK
- 6. City: Girones
- 7. Map Link:
- 8. Sponsor name (1):
- 9. Sponsor name (2):
- 10. Sponsor name (3): https://twitter.com/americancancer
- 11. Sponsor name (4): www.google.com
- 12. Sponsor name (5): activeDetermination

At the bottom of the form are buttons for 'Finish', 'Save', and 'Cancel'. A small link for 'Privacy Policy Is online giving safe?' is visible at the bottom left of the form area.

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 a [live stream link](#)
    - iii. 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 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.

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

## 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.'

**1. Recipients of Participant Milestone Achieved Notification as Designated by Event Managers:**

Identifies the email addresses (defined by Event Managers) for people who should be sent the notification that contains the report showing the participants who achieved this milestone




|  |                                       |
|--|---------------------------------------|
| <input type="text" value="janedoe@gmail.com"/>   | <input type="button" value="Remove"/> |
| <input type="text" value="suesmiley@yahoo.com"/> | <input type="button" value="Add"/>    |

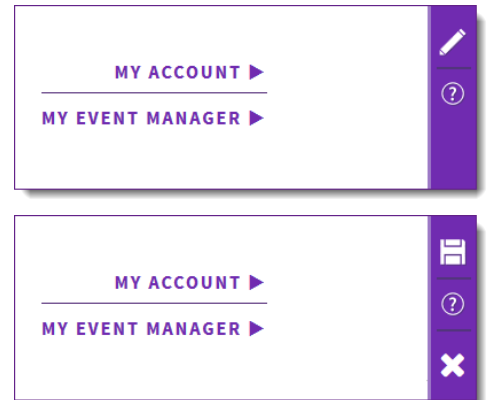
- a. If that person no longer wishes to receive email notifications, you can select that email address from the list and click 'Remove.'
2. Click 'Finish'

## Chapter 3: Edit Greeting Page

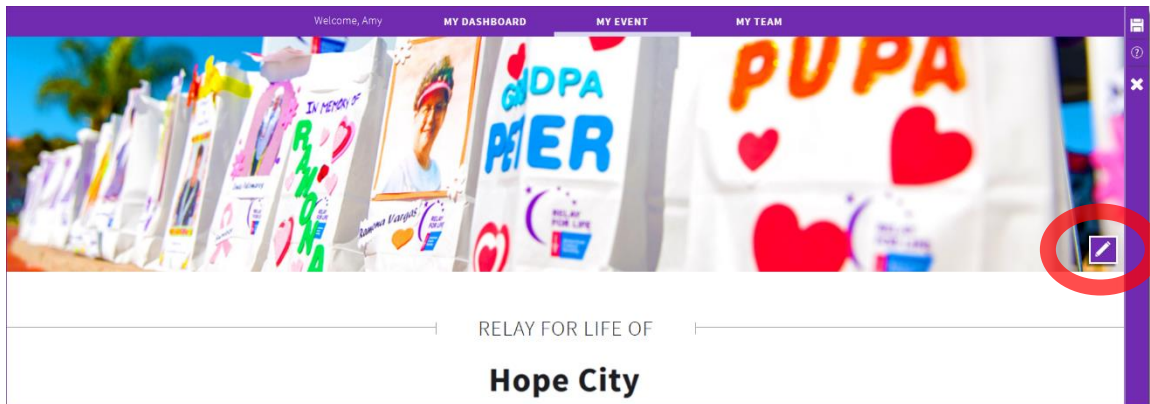
- [Using the Edit Tool](#)
- [Change Your Banner Image](#)
- [Edit Content Blocks](#)
- [Edit Event Announcements](#)
- [Sort and Hide Sections](#)
- [Add Local Forms and Documents](#)
- [Add Local Sponsors](#)
- [Add Custom Content](#)
- [Add Event Photos](#)

### 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



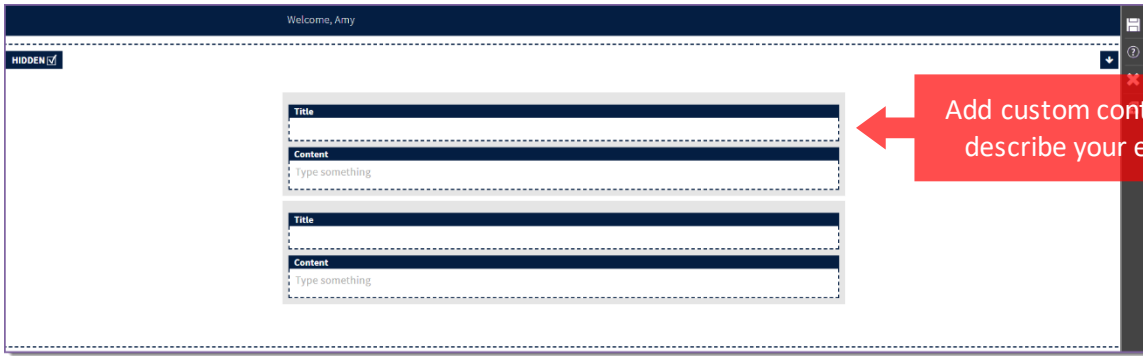
### Change Your Banner Image



### Edit Content Blocks

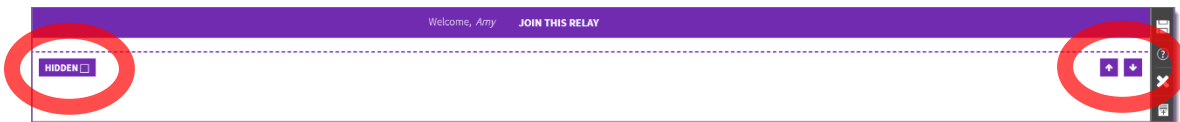
Some event websites may have a content block section for additional event information.



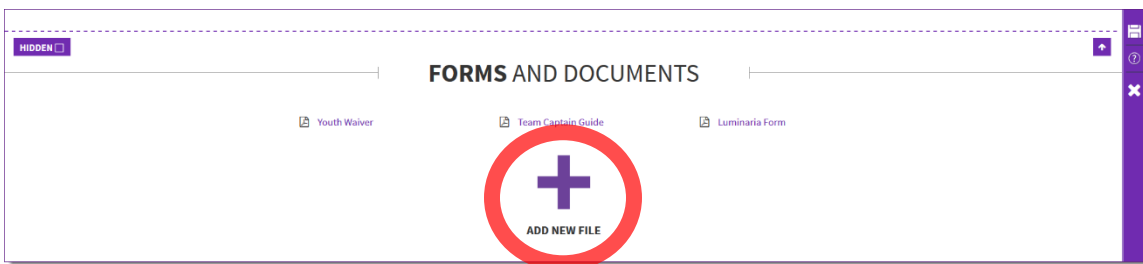


## Edit Event Announcements

## Sort and Hide Sections



## Add Local Forms & Documents



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

ADD NEW SPONSOR

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

ADD NEW SPONSOR

Other Programs: Use the sort arrows to arrange logos

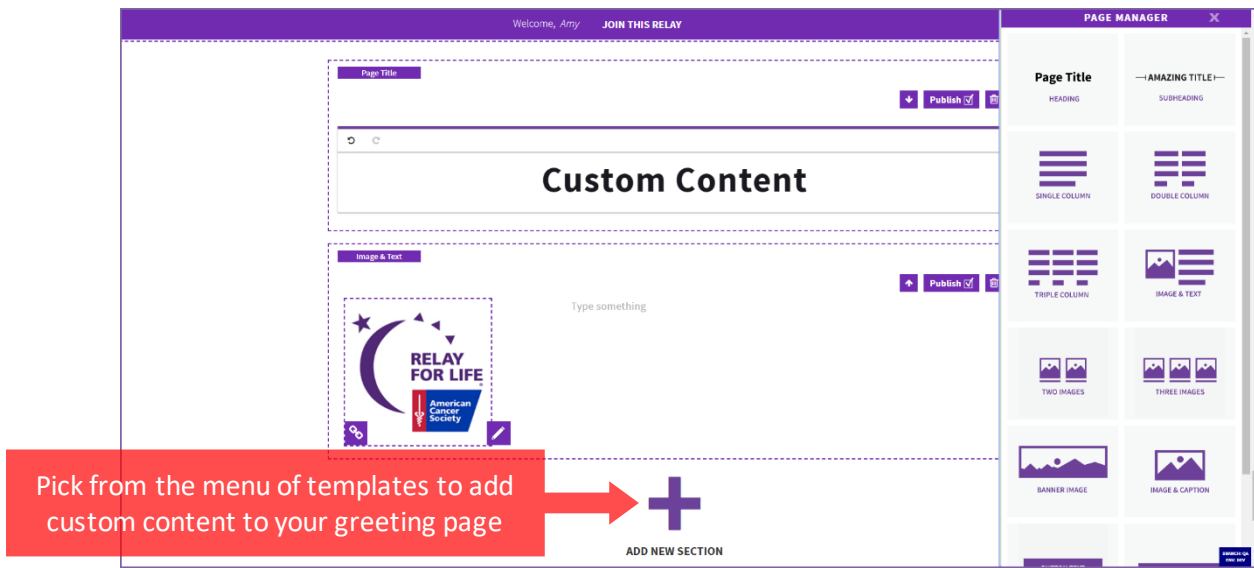
ADD NEW SPONSOR

\*Suggested Image Sizes for Sponsor Logos:

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

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

## Add Custom Content



## Add Event Photos

Please refer to the [Event Photos guide](#) for more information and screenshots.

- Once you're signed in and have the pencil icon showing to edit the event page, hide the current Event Photos section
- Event Announcements
  - Add a promo through an Event Announcement and include a link to the album. [Watch this quick instructional video](#).
- Add a New Section
  - Click on the "+Add New Section" to select a template and promote the link to the photo album in a number of ways. See the [Custom Page Guide](#) or [watch a quick instructional video](#) for more details on adding templates.
- Embed photo album
  - 1. Select Single Column
  - 2. Click the icon to open HTML editing
  - 3. Paste the embed code from wherever photo album is hosted. The first photo from the album will show and will open the album when clicked.
  - 4. Add text or button templates to include a link as well to view the full album.
- Image and Caption
  - 1. Add a 800 x 400 px image. There are several options in Canva to create a promotional image and include photos from the event.
  - 2. Link image with the photo album URL to open if users click the photo
  - 3. Add text with a link to appear underneath
- Button
  - 1. Enter text to appear on button
  - 2. Add link to photo album





Use the [Event Photos guide](#) for more information and screenshots.

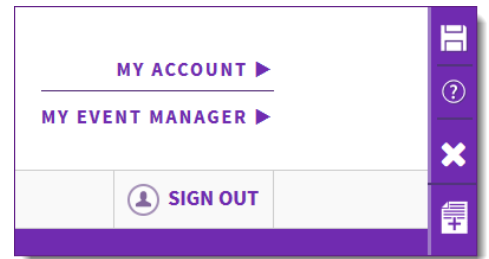
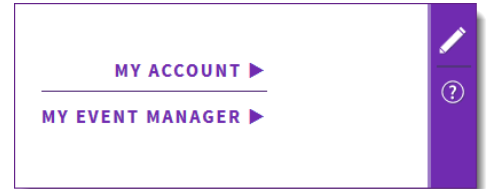
*If you have any questions, please open a [Salesforce Case](#).*

# Chapter 4: Edit and Create Content Pages

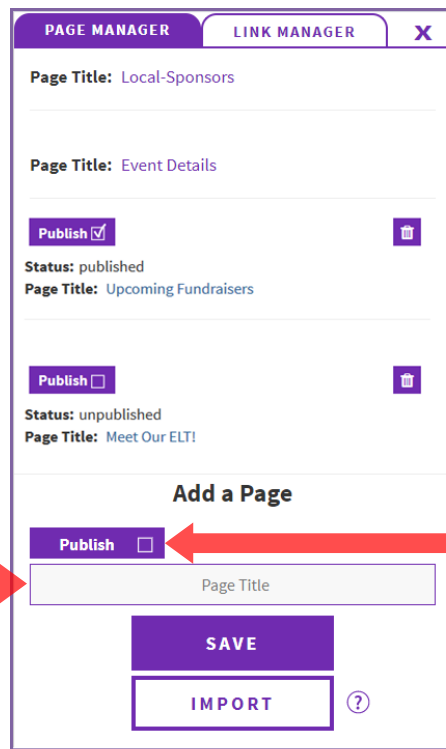
- [Using the Edit Tool](#)
- [Create a Custom Page](#)
- [Manage Custom Pages](#)
- [Customize Your Page](#)
- [Edit Event Details Page](#)
- [Edit Local Sponsors Page](#)

## 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

## Manage Custom Pages

The screenshot shows the 'PAGE MANAGER' interface with the following elements and callouts:

- Page Manager Header:** 'PAGE MANAGER' and 'LINK MANAGER' tabs with a close button 'X'.
- Page List:**
  - Page 1: 'Page Title: Local-Sponsors' (no action buttons visible).
  - Page 2: 'Page Title: Event Details' with a 'Publish ' button and a trash icon. Callout: 'Delete your pages'.
  - Page 3: 'Page Title: Upcoming Fundraisers' with a 'Publish ' button and a trash icon.
  - Page 4: 'Page Title: Meet Our ELT!' with a 'Publish ' button and a trash icon. Callout: 'Publish your page to add it to the More Info section'.
- Add a Page Section:**
  - 'Add a Page' header.
  - 'Publish ' button.
  - 'Page Title' input field.
  - 'SAVE' button.
  - 'IMPORT' button with a help icon. Callout: 'Import custom pages from last year'.

## Customize Your Page

The screenshot shows the user dashboard with the following elements and callouts:

- Top Bar:** 'DONATE' button, 'RELAY FOR LIFE' logo, 'MY ACCOUNT' and 'MY EVENT MANAGER' dropdown menus.
- Navigation Bar:** 'LEARN ABOUT RELAY', 'GET INVOLVED', 'FUNDRAISING', 'CONNECT', 'SIGN OUT'.
- User Bar:** 'Welcome, Amy', 'MY DASHBOARD', 'MY EVENT', 'MY TEAM'.
- Main Content Area:** A large purple plus sign with the text 'ADD NEW SECTION' below it. Callout: 'Add new sections from the template library to build your perfect page'.

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

Welcome, Amy JOIN THIS RELAY

Banner Image

Publish

Page Title

Publish

Upcoming Fundraisers

ADD NEW SECTION

PAGE MANAGER

Page Title

HEADING

SUBHEADING

SINGLE COLUMN

DOUBLE COLUMN

TRIPLE COLUMN

IMAGE & TEXT

TWO IMAGES

THREE IMAGES

BANNER IMAGE

IMAGE & CAPTION

Select a template to add to your page

Sort and delete your sections

Publish each section

## Edit Event Details Page

Welcome, Amy JOIN THIS RELAY

Banner Image

Publish

Page Title

Publish

Event Details

Single Column

Publish

Relay For Life is a grass roots, community-based team event. Although every Relay For Life event is different, they do have a few things in common.

Heading

Publish

PAGE MANAGER

Page Title

HEADING

SUBHEADING

SINGLE COLUMN

DOUBLE COLUMN

TRIPLE COLUMN

IMAGE & TEXT

TWO IMAGES

THREE IMAGES

BANNER IMAGE

IMAGE & CAPTION

Add additional customization with any of our templates!

Edit default page content

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

# Edit Local Sponsors Page

Welcome, Amy JOIN THIS RELAY

Banner Image

Publish

Page Title

Publish

## Become a Sponsor

Single Column

Publish

You can make a meaningful contribution to the American Cancer Society as a Relay For Life sponsor. Supporting a local event sends a message that you care about our community. There are a handful of sponsorship levels to choose from and with each level, you receive valuable visibility and sponsor benefits. Learn about our sponsorship opportunities.

Heading

Publish

## Our Sponsors

Publish

COMPANY NAME  
YOUR SAMPLE TEXT HERE

COMPANY NAME  
YOUR SAMPLE TEXT HERE

Your logo

ADD NEW SPONSOR

PAGE MANAGER

Page Title

HEADING

SUBHEADING

SINGLE COLUMN

DOUBLE COLUMN

TRIPLE COLUMN

TWO IMAGES

THREE IMAGES

BANNER IMAGE

IMAGE & CAPTION

SPONSOR GRID

CLICKABLE BUTTON

Button Text

Clickable Button

Edit default page content

Add additional customization with any of our templates!

Display sponsor grid or recognize sponsors however you wish!

\*Suggested Image Sizes for Image Templates:

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

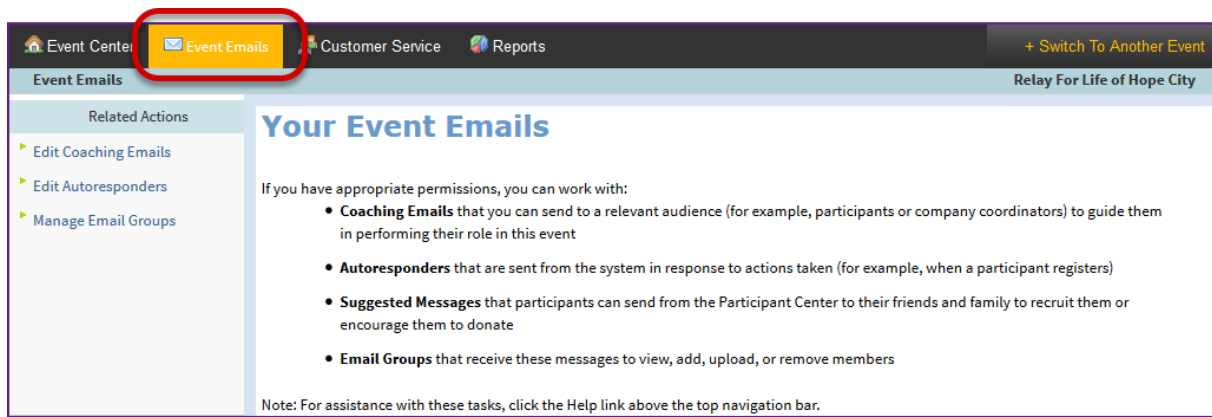


## Chapter 5: Event Emails

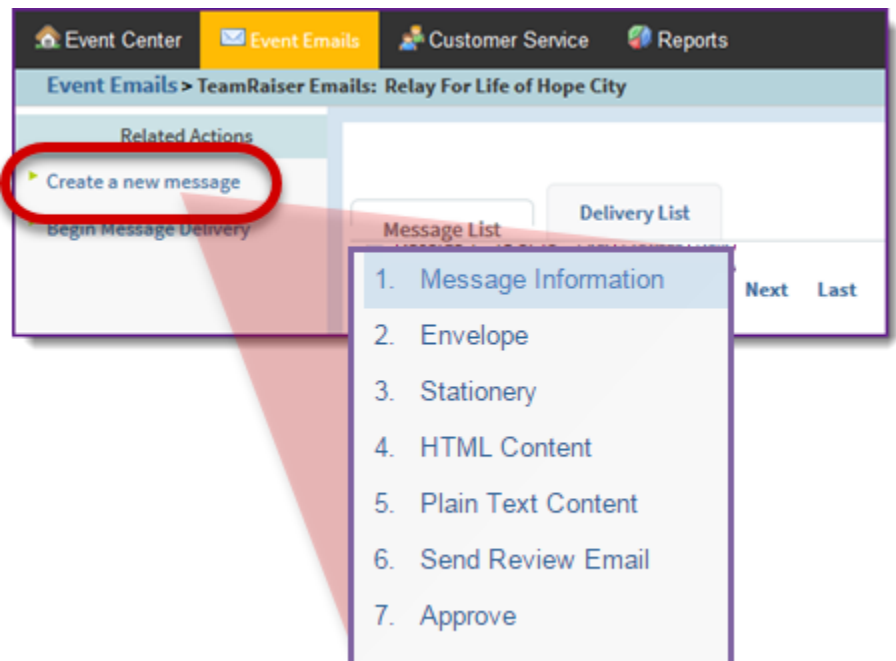
- [Create and Customize a local email](#)
- [Copy a National Email Template to Customize](#)
  - [Customize your newly copied email message](#)
- [Insert Documents and Photos](#)
  - [Create a link to a document](#)
  - [Insert an image](#)
- [Send your local email](#)
  - [Send an Engagement Email to 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](#).



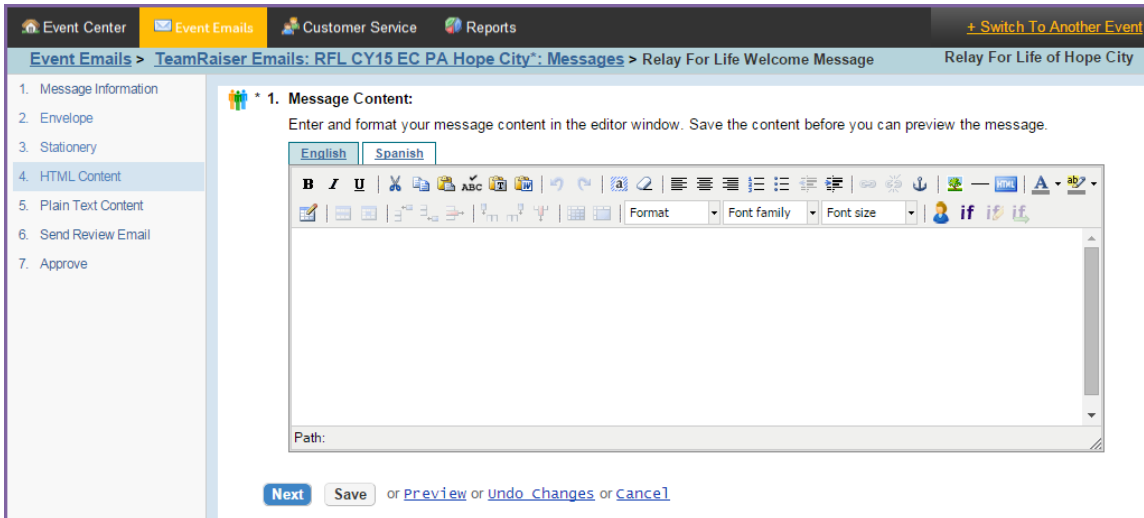
- a. **Step 1 – Message Information:** Specify the following information for internal identification of your message. Your recipients will not see this information. *(screen shot on following page)*
  - i. **Message Name:** Enter a message name that will help uniquely identify the email when browsing 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**.

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

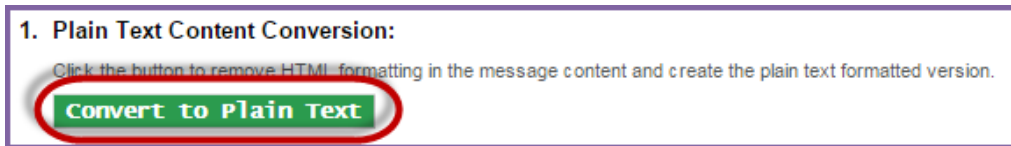
- i. **Enter the sender’s name:** Enter who the email is “from.”
- ii. **Enter the sender’s email address:** Enter the return email address to which the recipient can send reply emails. This must be an actual email address so questions will be delivered to the proper support.
- iii. **Enter the subject line of this message:** Enter the phrase that you want recipients to see as the email subject. Keep subject lines short and sweet!
- iv. Click **Next**.

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

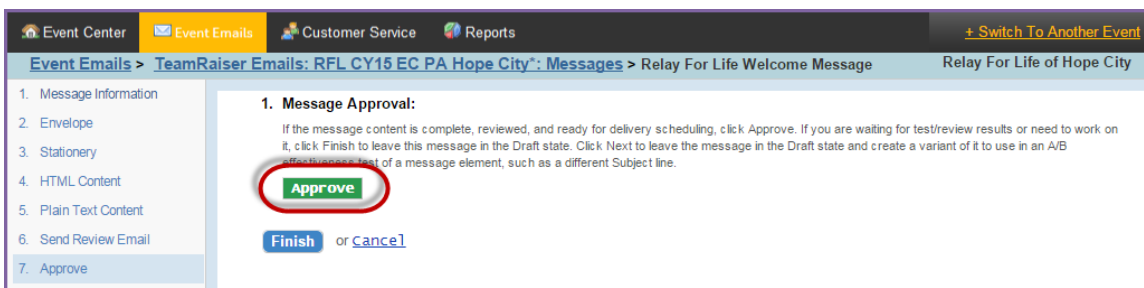
- c. **Step 3 – Stationery:** The stationery has already been selected for you. click **Next**.
- d. **Step 4 – HTML Content:** Use the WYSIWYG toolbar to create the content of your email.



- i. Click the **Preview** button to review the message layout and to check for typos and test links.
  - ii. Once you have previewed and saved your message, click **Next**.
- e. **Step 5 – Plain Text Content:** Click the **Convert to Plain Text** button to update the message you wrote in HTML content into Plain Text formatting. All HTML code (like font changes and images) will be removed but link-specific code will remain. You do not have to edit this coding



- i. Determine if any changes need to be made to the Plain Text formatting. Some things to look for are inconsistent spacing and placement of hyperlinks. When converting HTML content to plain text, hyperlinks will be moved to the end of a paragraph. Adjust your text as necessary. For example, you may choose to insert something like “Use the link below...” if you have embedded a link behind some text.
    - ii. Click the **Preview** button to review the message layout and to check for typos and test links.
    - iii. Once you have previewed and saved your message, click **Next**.
- f. **Step 6 – Send Review Email:** Send a test message to yourself or another person to proof read.
- g. **Step 7 – Approve:** Click **Approve** to identify this message as ready to send.



*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**.

|                                |                 |                          |                   |                       |   |
|--------------------------------|-----------------|--------------------------|-------------------|-----------------------|---|
| Relay For Life Welcome Message | Copy            | Approved<br>(never sent) | Email<br>Messages | No Tentative Schedule | Dec 2, 2014 1:37:09<br>PM by Amy Delozier |
|                                | Delete          |                          |                   |                       |   |
|                                | Archive         |                          |                   |                       |   |
|                                | Preview         |                          |                   |                       |   |
|                                | Return to Draft |                          |                   |                       |   |
|                                | Begin Delivery  |                          |                   |                       |   |

- 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.](#)

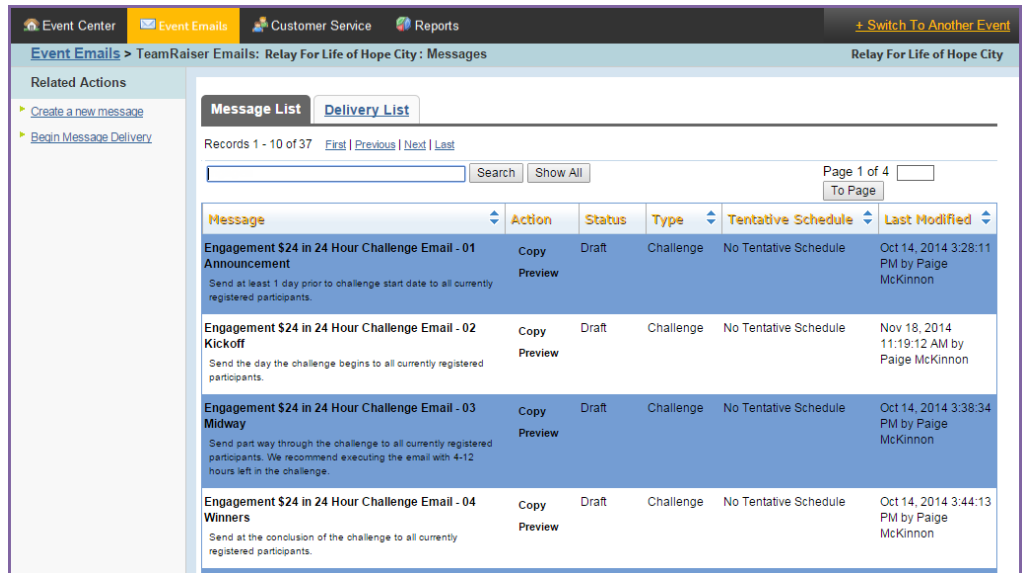
## Copy a National Email Template to Customize

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.

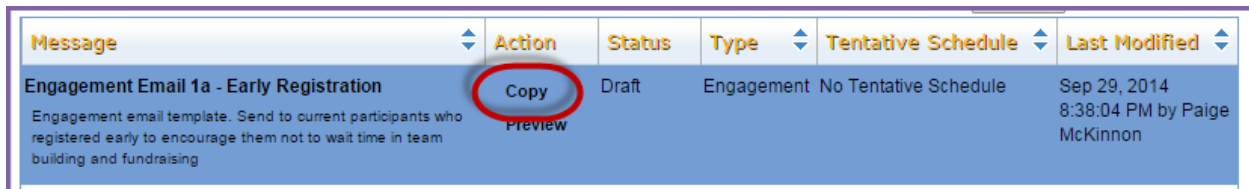
1. From the EMC, click **Event Emails**.

The screenshot shows the Salesforce Coaching Email Center interface. The top navigation bar includes 'Event Center', 'Event Emails' (highlighted with a red box), 'Customer Service', and 'Reports'. Below the navigation bar, the 'Event Emails' section is active, displaying 'Your Event Emails' for the 'Relay For Life of Hope City' event. The main content area lists related actions: 'Edit Coaching Emails', 'Edit Autoresponders', and 'Manage Email Groups'. Below this, a section titled 'Your Event Emails' explains that users can work with Coaching Emails, Autoresponders, Suggested Messages, and Email Groups. A note at the bottom states: 'Note: For assistance with these tasks, click the Help link above the top navigation bar.'

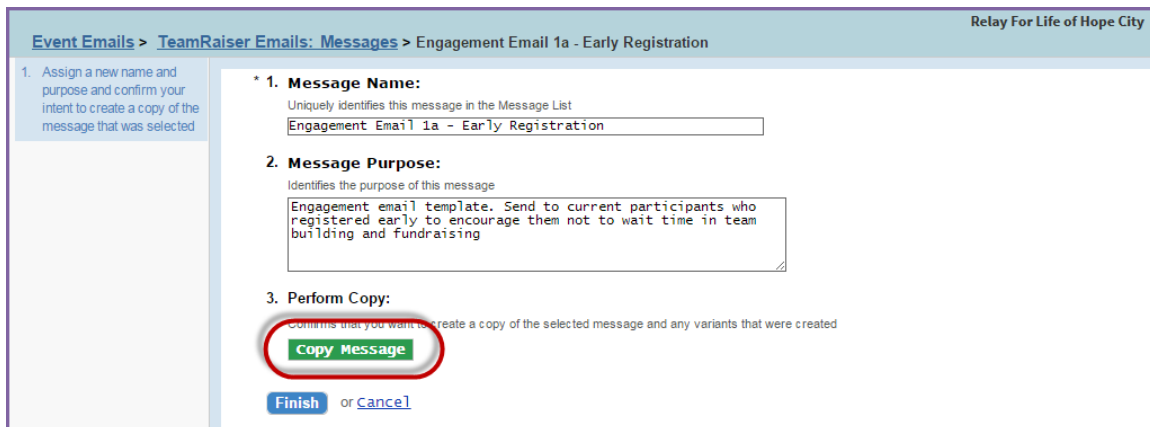
- Under Related Actions, select **Edit Coaching Emails**.
- A list of all available email messages will display.



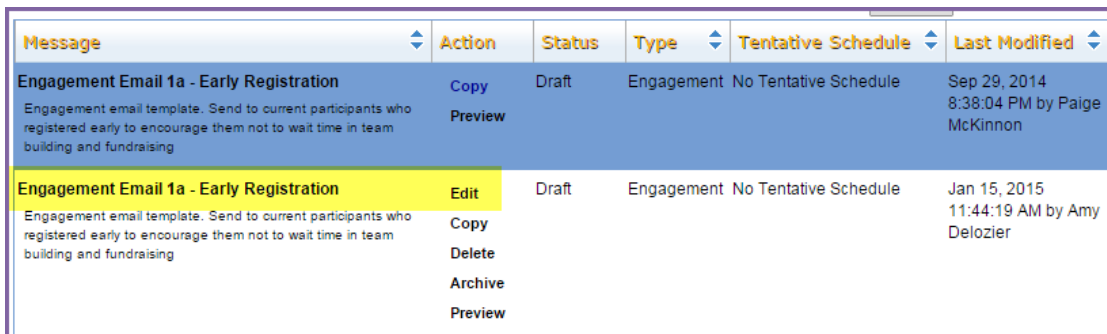
- Find the email you wish to send in the list, and click **Copy** next to the message name.



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



- 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**.

1. Message Information

2. Envelope

3. Stationery

4. HTML Content

5. Plain Text Content

6. Send Review Email

7. Approve

**1. Sender Name:**  
Enter the name to display in the From area of the email header and inbox of message recipients.  
English Spanish  
Relay For Life of Hope City

**2. Reply-To Email Address:**  
Enter the email address where replies to the message will be sent. The Sender Email Address will be used by default if empty.  
sue.smiley@cancer.org

**3. Message Subject:**  
Enter the phrase or select a personalized option to display in the Subject area in the email header and inbox of the message recipients.  
English Spanish  
Don't waste any time!  
Select Personalization Option

Next or Cancel

- c. **Step 3 – Stationery:** Select a stationery which will give each email a look or theme. After selecting your stationery, click **Next**.
- d. **Step 4 – HTML Content:** Use the WYSIWYG to add custom content to the email message.

1. Message Information

2. Envelope

3. Stationery

4. HTML Content

5. Plain Text Content

6. Send Review Email

7. Approve

**1. Message Content:**  
Enter and format your message content in the editor window. Save the content before you can preview the message.  
English Spanish

Dear [[S1:frst\_name]],

You have signed up early for the [[S47:66330:fr\_info:1:event\_title]] and showed that you are committed to fighting cancer everyday - and not just when we gather on [[S47:66330:fr\_info:1:event\_date]]. Thank you for your early registration and being a leader in our community.

While our [[S47:66330:fr\_info:1:event\_title]] is still [x] months away, you've shown that it's never too early to get started. Keep up the momentum of registering online with some extra cancer-fighting fundraising work with your team!

- Aim to join the Hope Club before the end of the year! The Hope Club is a nationwide army of Relay For Life participants that have raised the suggested minimum of \$100 and have earned their Relay For Life event t-shirts! Why wait to try and fulfill your

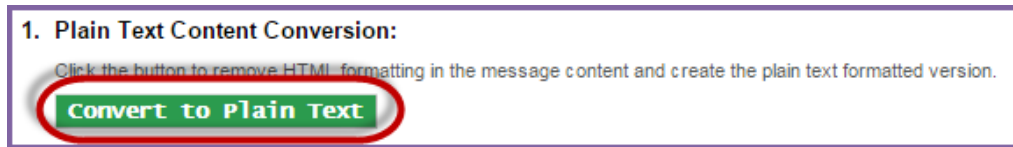
Path:

Next Save or Preview or Undo Changes or Cancel

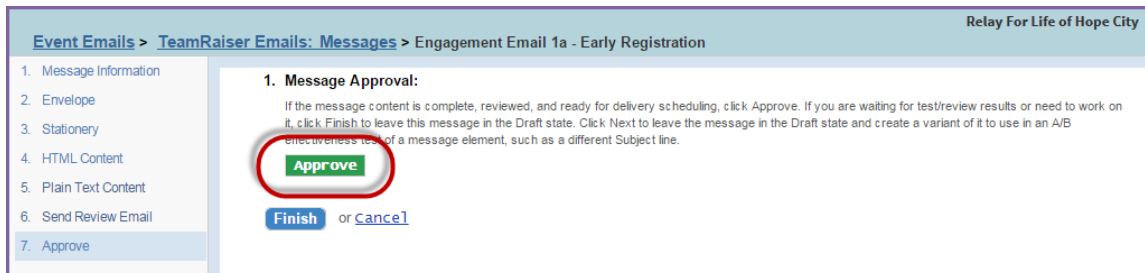
- i. Click **Save** often, so as not to lose your edits.

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

- ii. Click the **Preview** button to review the message layout and to check for typos and test links.
  - iii. Once you have previewed and saved your message, click **Next**.
- e. **Step 5 – Plain Text Content:** Click the **Convert to Plain Text** button to update the message you wrote in HTML content into Plain Text formatting. All HTML code (like font changes and images) will be removed but link-specific code will remain. You do not have to edit this coding



- i. Determine if any changes need to be made to the Plain Text formatting. Some things to look for are inconsistent spacing and placement of hyperlinks. When converting HTML content to plain text, hyperlinks will be moved to the end of a paragraph. Adjust your text as necessary. For example, you may choose to insert something like “Use the link below...” if you have embedded a link behind some text.
  - ii. Click the **Preview** button to review the message layout and to check for typos and test links.
  - iii. Once you have previewed and saved your message, click **Next**.
- f. **Step 6 – Send Review Email:** Send a test message to yourself or another person to proof read.
- g. **Step 7 – Approve:** Click **Approve** to identify this message as ready to send.



- h. Click **Finish**.

|  |                        |              |                                  |                             |
|--|------------------------|--------------|----------------------------------|-----------------------------|
| <b>Engagement Email 1a - Early Registration</b>  | <b>Copy</b>            | Approved     | Engagement No Tentative Schedule | Jan 15, 2015                |
| Engagement email template. Send to current participants who registered early to encourage them not to wait time in team building and fundraising | <b>Delete</b>          | (never sent) |                                  | 11:55:05 AM by Amy Delozier |
|  | <b>Archive</b>         |              |                                  |                             |
|  | <b>Preview</b>         |              |                                  |                             |
|  | <b>Return to Draft</b> |              |                                  |                             |
|  | <b>Begin Delivery</b>  |              |                                  |                             |

- 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.](#)

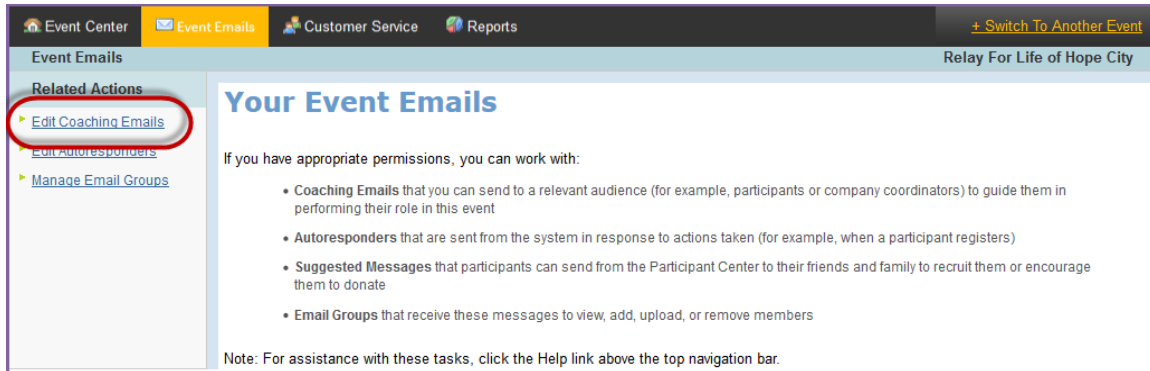
## Insert Documents and Photos

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.

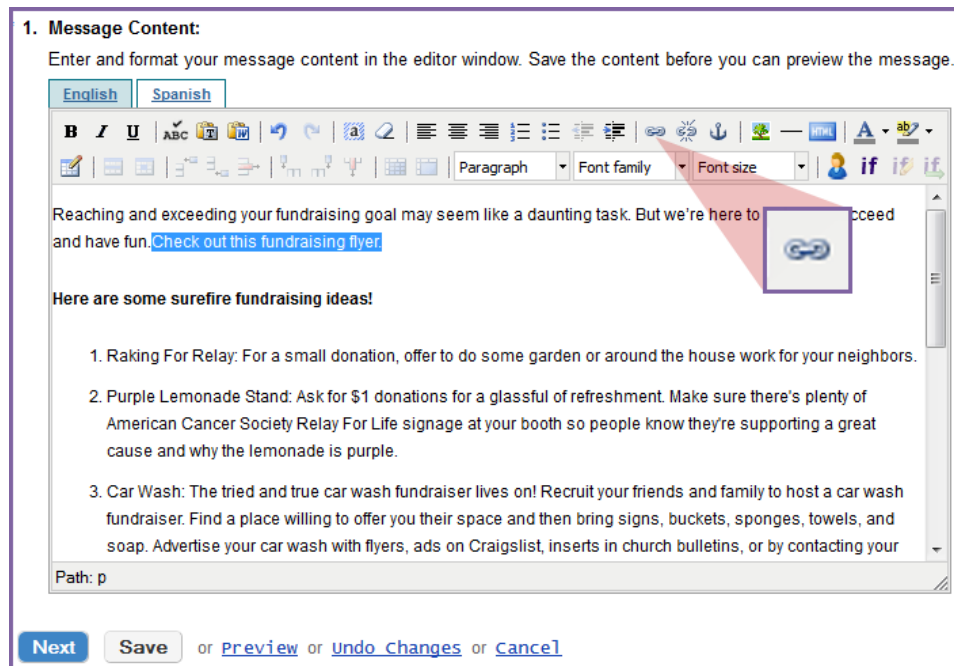
### Insert a Document Link into an Email

**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**.



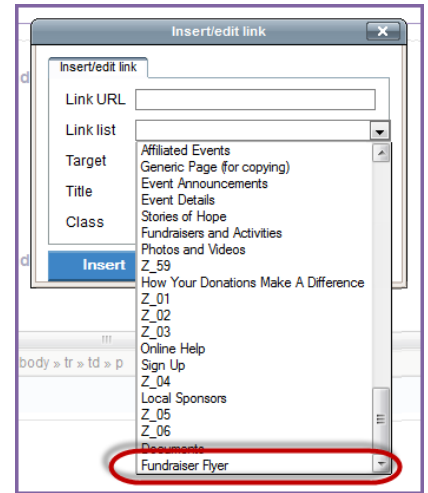
3. Follow the necessary steps to create and edit the email you wish to add the document to.
4. On step **4. HTML Content**, create your desired link text by typing directly onto the email (i.e. View the flyer here).
5. Highlight the text you'd like to be a link, then click the **Insert/Edit Link** button from the WYSIWYG tool bar.



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



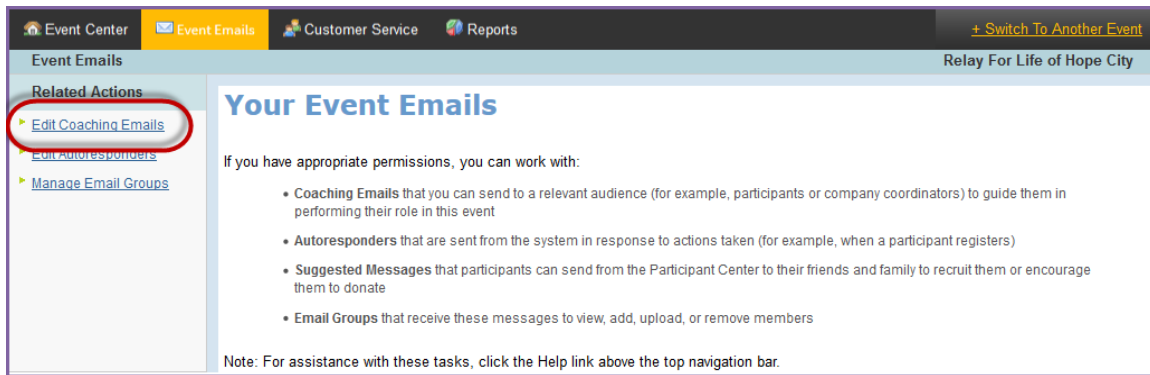
- From the link drop down menu at the bottom of that list, you'll find all the documents you have uploaded in your document library.
- Change the **Target** to **Open link in a new window**.
- Click **Insert**.
- Once you save that email, the highlighted words will become a link to the document.



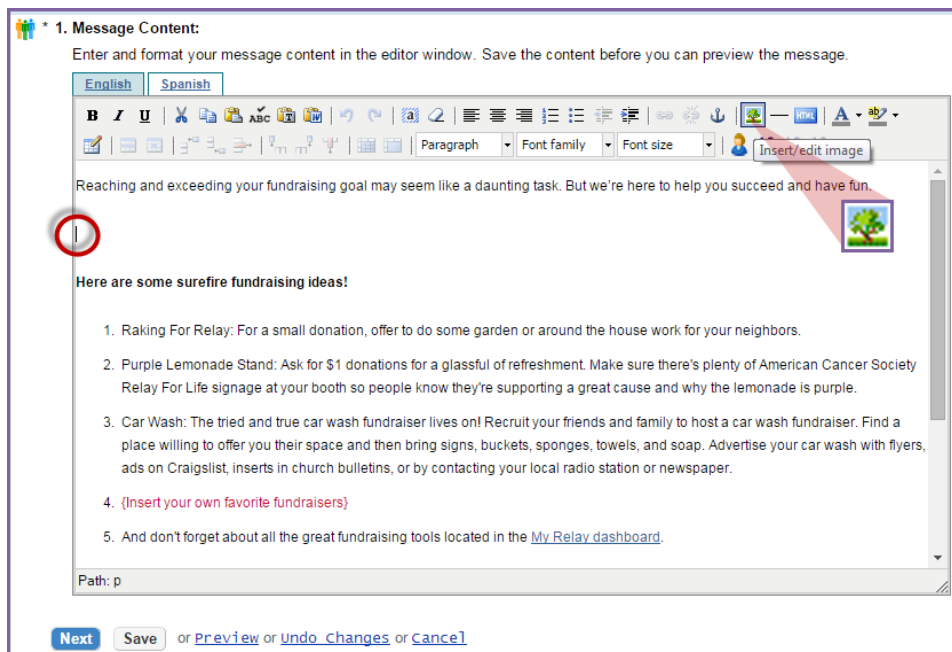
## Insert an Image into an Email

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

- From the EMC, select the **Event Emails**.
- Under **Related Actions**, choose **Edit Coaching Emails** to find the email you wish to edit.



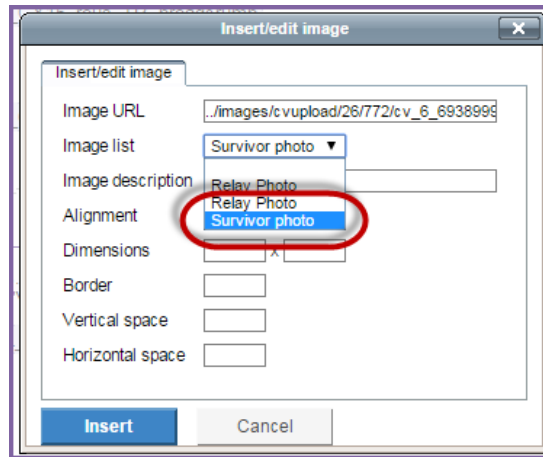
- Follow the necessary steps to create and edit the email you wish to add the image to.
- On step **4. HTML Content**, place your cursor at desired location in the email where you would like to add the picture.
  - Choose the **Insert/edit Image** button from the WYSIWYG tool bar.



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



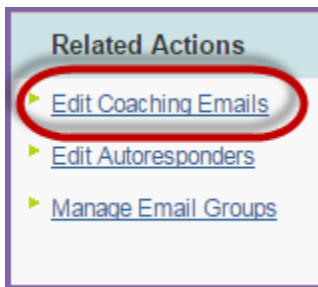
- b. From the **Image List** drop down menu, you'll find all the images you have uploaded in your image library.
- c. Select the image you wish to insert. Click **Insert**.
- d. The image will appear on the webpage. While still in the edit field, pull the corners of the image to resize the picture. Through 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**.



2. Under Related Actions, select **Edit Coaching Emails**.
3. Locate the customized and approved message you wish to send. Click **Begin Delivery** beside the email.



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

## Send an Engagement Email to Current Event Participants

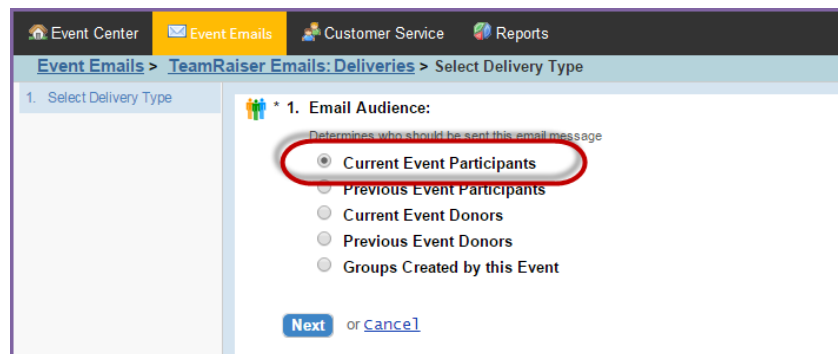
An Engagement Email is used to 'engage' your currently registered participants.

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

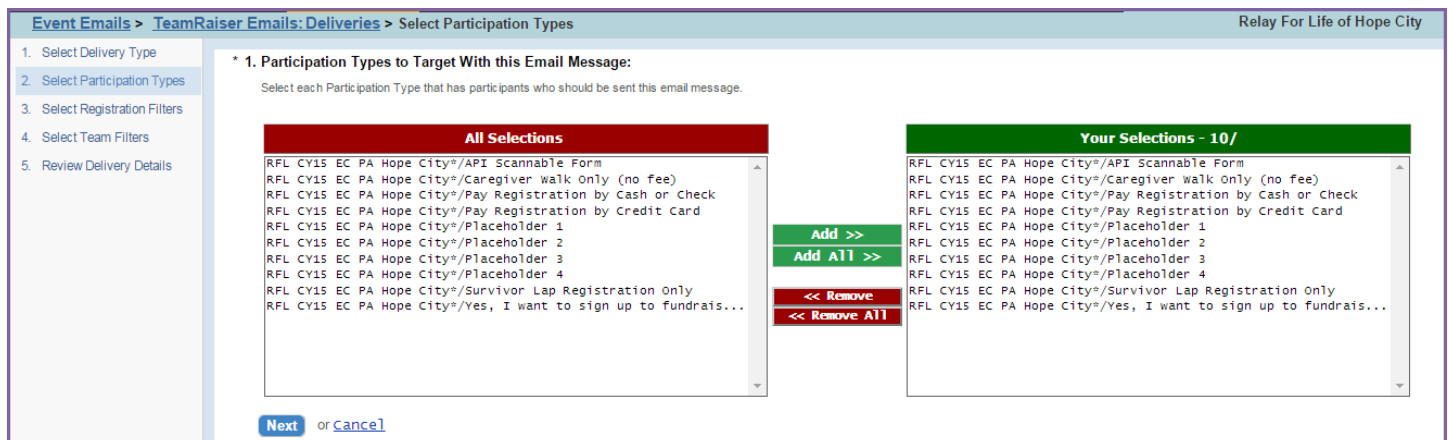


2. Select the **audience** to receive this email. When sending an Engagement Email Message, select **Current Event Participants**. (If you are sending a "Recruitment" email, [follow these step-by-step instructions](#).)

❖ **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 factors such as team captain status or registration date. [See Appendix E for more information on the different filters](#)

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

[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.

The screenshot shows the Salesforce Event Emails interface. The main content area displays '1. Delivery Details' for an engagement email. It includes sections for 'Schedule' (Immediately), 'Target Groups' (a table of audience groups), 'Do Not Email Groups' (a table of groups to exclude), and 'Filters Applied'. A callout box at the bottom highlights the '2. Ready to Send to Delivery Queue' section, which contains a 'Send Immediately' button circled in red.

| Group   | Last Rebuilt             | Rebuild at Delivery |
|---|--------------------------|---------------------|
| RFL CY15 EC PA Hope City*/API Scannable Form                          | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Placeholder 3                               | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Yes, I want to sign up to fundraise online! | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Placeholder 1                               | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Caregiver Walk Only (no fee)                | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Pay Registration by Cash or Check           | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Placeholder 2                               | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Survivor Lap Registration Only              | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Placeholder 4                               | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Pay Registration by Credit Card             | Group is not rebuildable | No                  |

| Group   | Last Rebuilt             | Rebuild at Delivery |
|---|--------------------------|---------------------|
| TeamRaiser Emails: Relay For Life of Deptford Opt Out. 197006 | Group is not rebuildable | No                  |

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**.

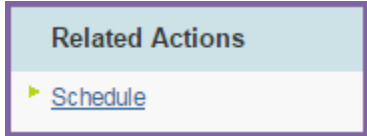
After selecting Send Immediately, the message will be immediately delivered to the recipients' inboxes and the email process will have been completed. (skip down to d. if you would prefer to schedule your email for a future date/time)

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.**

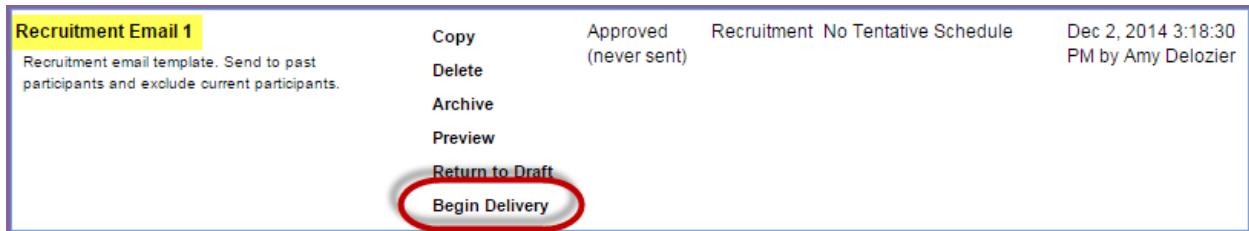
ii. Click **Finish**.

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

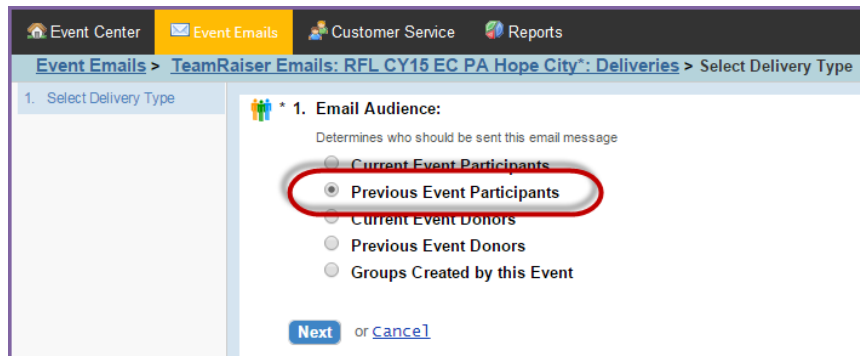
A Recruitment Email is used to 'recruit' your past participants and invite them back to your event for the current season.



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.



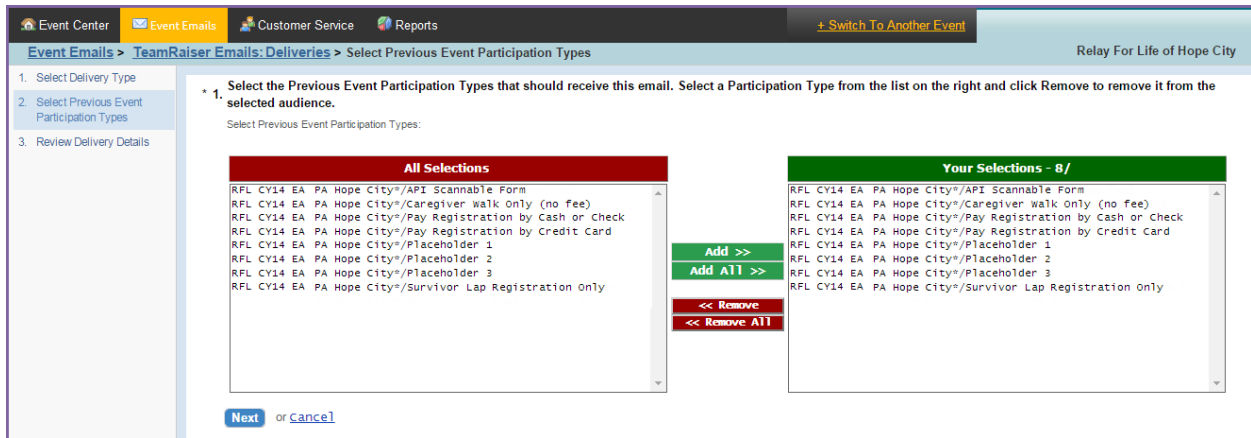
3. Click Next

4. Select Previous Event Participation Types:

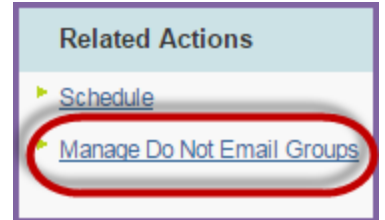
a. Highlight the prior event participation types you wish to send the email to. Click the **Add** or **Add All** green buttons to select those groups.

b. To select multiple groups, hold **CTRL** as you select two or more groups.

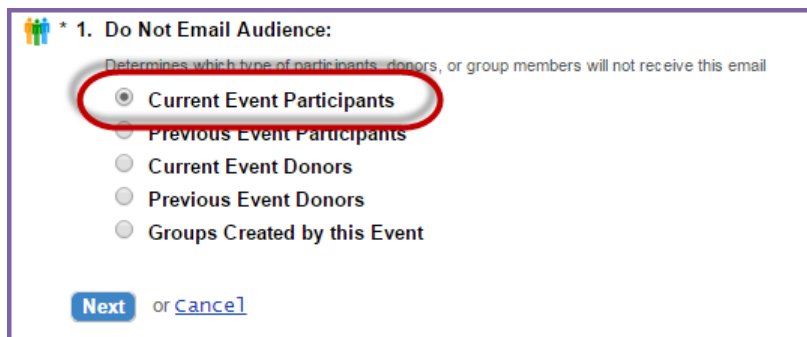
c. Once all the appropriate groups have been added to the **Your Selection** box, click **Next**.



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.

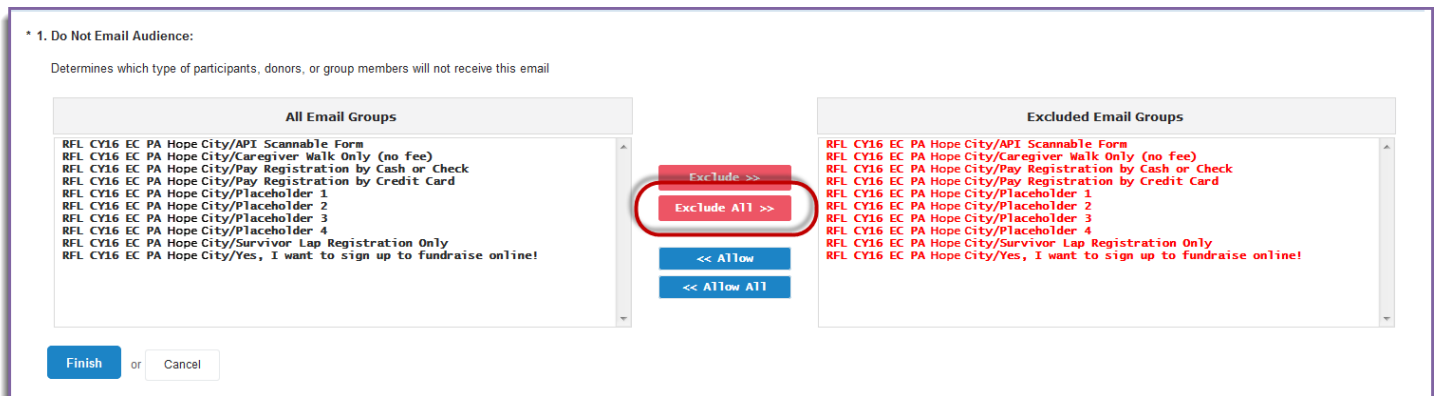


6. Manage Do Not Email Groups: Select **Current Event Participants**



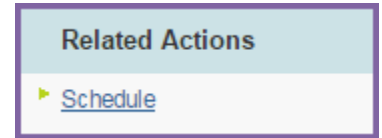
7. Click **Next**

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**



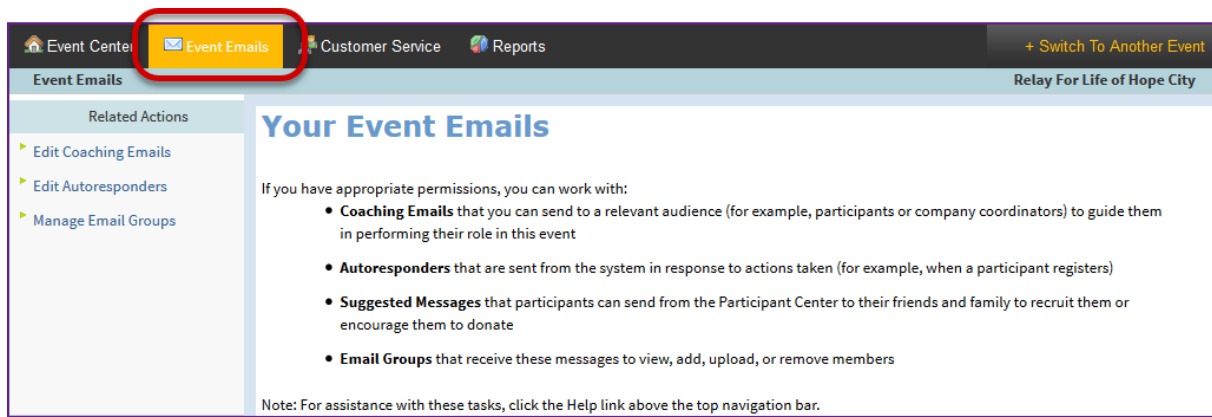
If you have any questions, please open a [Salesforce Case](#).

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**.
    - 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.

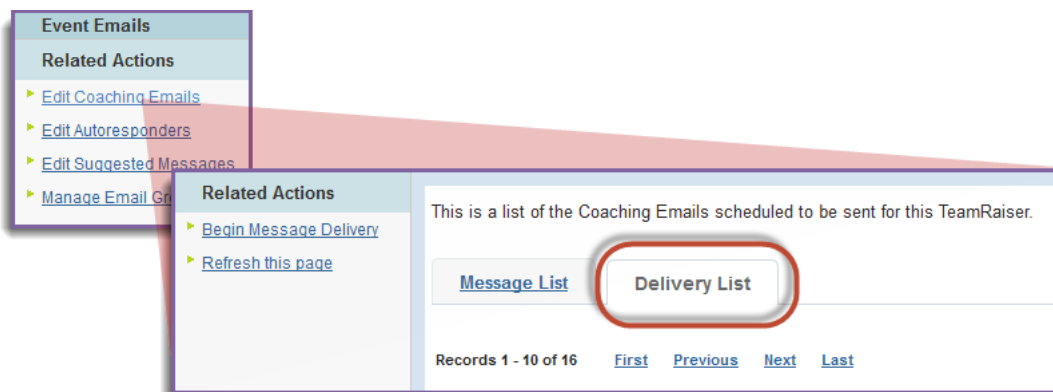


## Review Sent and Scheduled Messages

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.

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

- 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.

The screenshot shows the Salesforce Event Emails interface. The main content area displays a list of coaching emails scheduled for delivery. The table has columns for Delivery, Action, Status, Schedule, and Completed. Two rows are highlighted with red circles around their 'Action' buttons: 'Recruitment Email 1' (Sent) and 'Recruitment Email 2' (Scheduled).

| Delivery   | Action  | Status               | Schedule               | Completed               |
|--|---|----------------------|------------------------|-------------------------|
| <b>Recruitment Email 1</b><br>Recruitment email template. Send to past participants and exclude current participants.<br>Number Sent: 270                                | <a href="#">Review</a><br><a href="#">Resend</a><br><a href="#">Archive</a> | Sent                 | Immediate              | Dec 3, 2014 11:53:59 AM |
| <b>Engagement Email 1 - Three helpful tips</b><br>Engagement email template. Send to current participants to encourage fundraising and team building.<br>Number Sent: 18 | <a href="#">Review</a><br><a href="#">Resend</a><br><a href="#">Archive</a> | Sent                 | Immediate              | Dec 2, 2014 3:10:42 PM  |
| <b>Recruitment Email 2</b><br>Recruitment email template. Send to past participants and exclude current participants.<br>Number Sent: 0                                  | <a href="#">Review</a><br><a href="#">Cancel</a>                            | Scheduled            | Dec 4, 2014 1:00:16 PM |                         |
| <b>Recruitment Email 1</b><br>Recruitment email template. Send to past participants and exclude current participants.<br>Number Sent: 0                                  | <a href="#">Begin Delivery</a><br><a href="#">Archive</a>                   | Partially configured | Immediate              |                         |

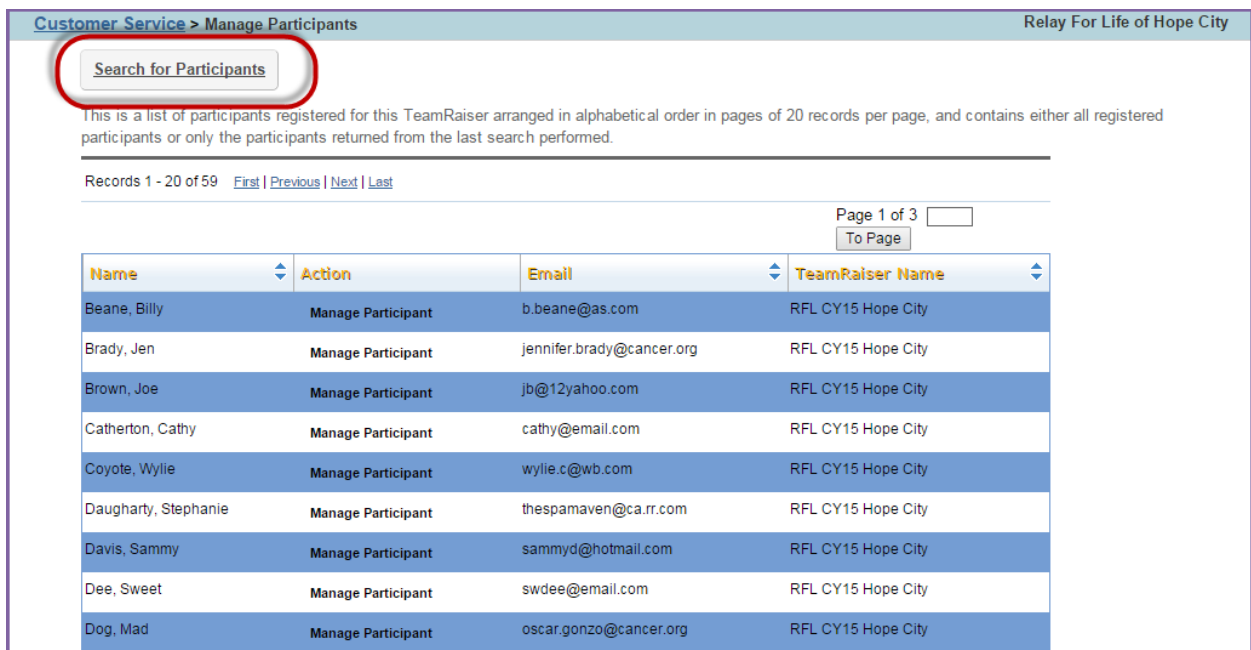
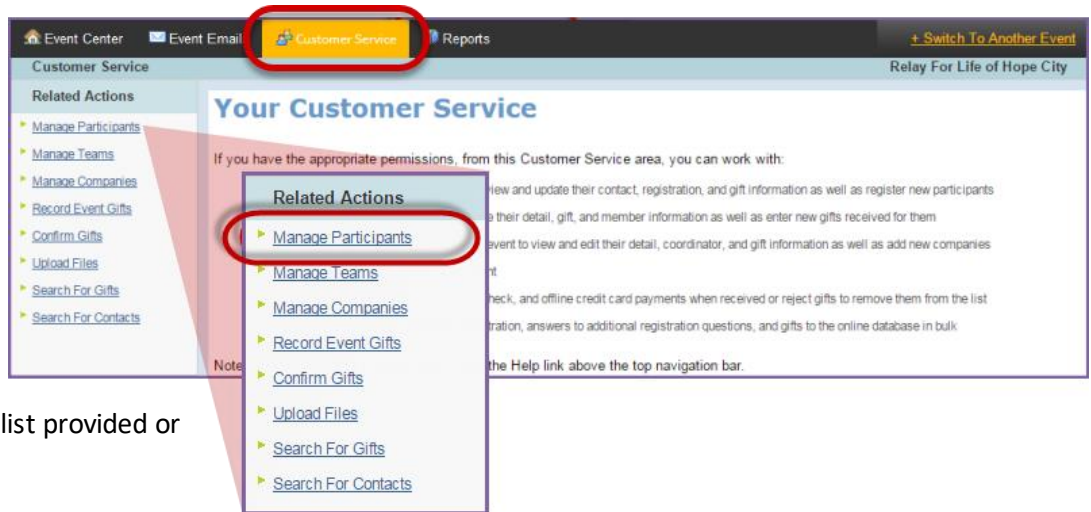


# Chapter 6: Customer Service – Manage Participants

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

## Search for Participants

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



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

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



**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.

| Name          | Action             | Email      | TeamRaiser Name    |
|---------------|--------------------|------------|--------------------|
| Johnson, Jane | Manage Participant | jj@aol.com | RFL CY15 Hope City |

## 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.

| Name           | Action                          | Gift Type                | Donation Type | Gift Date  | Amount   |
|----------------|---------------------------------|--------------------------|---------------|------------|----------|
| Test1 Donation | View/Edit<br>Change Soft Credit | Offline Confirmed (Cash) | Gift          | 11/07/2014 | \$100.00 |
| Test2 Donation | View/Edit<br>Change Soft Credit | Offline Confirmed (Cash) | Gift          | 11/07/2014 | \$25.00  |
| Michael Jordan | View/Edit<br>Change Soft Credit | Offline Confirmed (Cash) | Gift          | 11/13/2014 | \$200.00 |
| Darth Vader    | View/Edit<br>Change Soft Credit | Offline Confirmed (Cash) | Gift          | 11/13/2014 | \$25.00  |

Within the participant’s gift list, you can change the honor roll name, gift soft credit, or refund the donation. [See Chapter 9: Manage Gifts for detailed steps.](#)

# Edit the Registration Information of a Participant

## Update a Participant's Basic Registration Information

1. From the EMC, click **Customer Service**.
2. Under Related Actions, select **Manage Participants**.
3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.
4. Beside the participant's account, click **Manage Participant** to access the participant's profile.

| Name                | Action                    | Email                     | TeamRaiser Name                |
|---------------------|---------------------------|---------------------------|--------------------------------|
| Solo, Princess Leia | <b>Manage Participant</b> | princessleia@theforce.com | RFL CY15 National Community BP |

5. From the participant record, under **Related Actions** (left hand side of the page), click **Edit Registration**.

The screenshot shows the Salesforce interface for managing a participant. The top navigation bar includes 'Event Center', 'Event Emails', 'Customer Service', and 'Reports'. The current page is 'Manage Participant' for 'Princess Leia Solo'. The 'Related Actions' sidebar on the left has 'Edit Registration' circled in red. The main content area shows participant details and a 'Gift History' table.

**Participant Details:**

- Name: Princess Leia Solo
- Email: princessleia@theforce.com
- Username: princessleia@theforce.com
- Participation Type: Yes, I want to sign up to fundraise online
- Registration Type: Online
- Fundraising Goal: \$100.00
- Registration Status: Active
- Personal Page: Public
- Team Name: Test Team
- Team Rank: Captain

**Gift History Table:**

| Name           | Action                         | Gift Type                       | Donation Type | Gift Date  | Amount   |
|----------------|--------------------------------|---------------------------------|---------------|------------|----------|
| Test1 Donation | View/Edit<br>Confirm<br>Reject | Offline Unconfirmed (Cash) Gift |               | 11/07/2014 | \$100.00 |
| Test2 Donation | View/Edit<br>Confirm<br>Reject | Offline Unconfirmed (Cash) Gift |               | 11/07/2014 | \$25.00  |
| Michael Jordan | View/Edit<br>Confirm<br>Reject | Offline Unconfirmed (Cash) Gift |               | 11/13/2014 | \$200.00 |
| Darth Vader    | View/Edit<br>Confirm<br>Reject | Offline Unconfirmed (Cash) Gift |               | 11/13/2014 | \$25.00  |

- a. Make changes to the individual's online registration as needed:

- i. Update the individual's **participation type** from the drop down.
- ii. Change the participant's individual **fundraising goal**.
- iii. Add **emergency contact** information
- iv. Click **Next**.

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

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

Customer Service > Manage Participants > Manage Participant > Record Registration Fees Received Relay For Life of Hope City

|  |  |
|--|--|
| <ol style="list-style-type: none"> <li>1. Edit Registration</li> <li>2. Edit Registration Responses</li> <li style="background-color: #e0e0e0;">3. Record Fees Received</li> </ol> | <ol style="list-style-type: none"> <li> <b>1. Registration Fees</b><br/>           Registration fees for the participation type selected by this participant only. Does not include family registrations registration fee amounts.<br/>           \$10.00         </li> <li> <b>2. Discount Amount</b><br/>           Amount that will be applied to this participant's registration fees. Does not include family registrations discount amounts.<br/>           \$0.00         </li> <li> <b>3. Total Fees Owed</b><br/>           Amount owed by this participant. Includes registration fees minus any discounts that were used for this participant and any family registrations that they may have entered while registering.<br/>           \$10.00         </li> <li> <b>4. Additional Gift Handling</b><br/>           The following additional gift given during registration will be converted to a donation soft credited to the participant. This does not affect status indicators.<br/>           \$0.00         </li> <li> <b>5. Record Payment Received</b><br/>           Enter the payment method used to pay the registration fee, or cancel to leave as unpaid. If the participant paid more than their registration fees, please enter the extra amount as an offline gift. <b>Note that once you confirm these fees as received, you will not be able to undo or edit the registration fees.</b><br/> <input checked="" type="radio"/> Cash<br/> <input type="radio"/> Check         </li> </ol> <p style="text-align: right;"> <input type="button" value="Finish"/> or <input type="button" value="Cancel"/> </p> |
|--|--|

## Delete a Participant's Online Registration

When you deactivate a participant:

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

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

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

1. From the EMC, click **Customer Service**.
2. Under Related Actions, select **Manage Participants**.
3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.

4. Beside the participant's account, click **Manage Participant** to access the participant's profile.
5. From within the participant record, under **Related Actions** (left hand side of the page), click **Make Inactive**.
6. Click **Make Inactive** to deactivate the participant's registration.

**Customer Service > Manage Participants > Manage Participant**

**Related Actions**

- Record Donation
- Edit Contact Information
- Edit Registration
- Make Inactive**
- Remove From All Teams
- Make Private
- Create New Team
- Change Team
- Promote to Captain
- Promote to Co-Captain
- Edit Pages

This is a summary that shows the contact, registration, Personal Page work with this information.

|                             |                                |
|-----------------------------|--------------------------------|
| <b>Name:</b>                | Sally Jobs_Test                |
| <b>Email:</b>               | agutierrez+test@convio.com     |
| <b>Username:</b>            | agtest73                       |
| <b>Participation Type:</b>  | Survivor Lap Registration Only |
| <b>Registration Type:</b>   | Offline                        |
| <b>Fundraising Goal:</b>    | \$0.00                         |
| <b>Registration Status:</b> | Active                         |
| <b>Personal Page:</b>       | Public                         |
| <b>Team Name:</b>           | Agustin's Team                 |
| <b>Team Rank:</b>           | Member                         |
| <b>Company Name:</b>        | Aperture Science               |

**Customer Service > Manage Participants > Manage Participant > Make Inactive** Relay For Life of Hope City

1. Make Inactive

### Make this Participation Registration Inactive

If you make this registration inactive, the following will occur:

- This participant will be removed from the group of participants for this event.
- This participant will be removed from the list of pending autoresponders for this event.
- This participant will not be displayed in search results when donors, people who want to join their team, and other site visitors perform searches.
- This participant cannot log into the Participant Center and access their Personal Page.

**Make Inactive** or [Cancel](#)

7. Once you have made a contact inactive, the **Delete Registration** option will appear under the Related Actions side bar.

**Customer Service > Manage Participants > Manage Participant**

**Related Actions**

- Record Donation
- Edit Contact Information
- Edit Registration
- Make Active
- Delete Registration**
- Remove From All Teams
- Make Private
- Create New Team
- Change Team
- Promote to Captain
- Promote to Co-Captain
- Edit Pages

This is a summary that shows the contact, registration, Personal Page work with this information.

|                             |                                |
|-----------------------------|--------------------------------|
| <b>Name:</b>                | Sally Jobs_Test                |
| <b>Email:</b>               | agutierrez+test@convio.com     |
| <b>Username:</b>            | agtest73                       |
| <b>Participation Type:</b>  | Survivor Lap Registration Only |
| <b>Registration Type:</b>   | Offline                        |
| <b>Fundraising Goal:</b>    | \$0.00                         |
| <b>Registration Status:</b> | Inactive                       |
| <b>Personal Page:</b>       | Public                         |
| <b>Team Name:</b>           | Agustin's Team                 |
| <b>Team Rank:</b>           | Member                         |
| <b>Company Name:</b>        | Aperture Science               |

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

## Make a Participant's Registration Private

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

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

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

- Under Related Actions, select **Manage Participants**, and search for the participant record.
- A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.
- Click **Manage Participant** to access the participant's profile.

| Name            | Action                    | Email            | TeamRaiser Name                |
|-----------------|---------------------------|------------------|--------------------------------|
| Smiley, SueTest | <b>Manage Participant</b> | ssmiley@test.com | RFL CY15 National Community BP |

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

Customer Service > Manage Participants > Manage Participant

**Related Actions**

- Record Donation
- Edit Contact Information
- Edit Registration
- Make Inactive
- Remove From All Teams
- Make Private**
- Create New Team
- Change Team
- Promote to Captain
- Promote to Co-Captain
- Edit Pages

This is a summary that shows the contact, registration, Personal Page, team, and fundraising work with this information.

|                             |   |
|-----------------------------|---|
| <b>Name:</b>                | SueTest Smiley                              |
| <b>Email:</b>               | ssmiley@test.com                            |
| <b>Username:</b>            | ssmiley@test.com                            |
| <b>Participation Type:</b>  | Yes, I want to sign up to fundraise online! |
| <b>Registration Type:</b>   | Online                                      |
| <b>Fundraising Goal:</b>    | \$100.00                                    |
| <b>Registration Status:</b> | Active                                      |
| <b>Personal Page:</b>       | Public                                      |
| <b>Team Name:</b>           | Team Hope                                   |
| <b>Team Rank:</b>           | Member                                      |

- Select **Make Private**.

Customer Service > Manage Participants > Manage Participant > Make Private

1. Make Private

## Make this registration private

If you make this registration private, site users will NOT be able to search for this participant.

**Make Private** or [Cancel](#)

- The record will reflect this update.

|                             |   |
|-----------------------------|---|
| <b>Name:</b>                | SueTest Smiley                              |
| <b>Email:</b>               | ssmiley@test.com                            |
| <b>Username:</b>            | ssmiley@test.com                            |
| <b>Participation Type:</b>  | Yes, I want to sign up to fundraise online! |
| <b>Registration Type:</b>   | Online                                      |
| <b>Fundraising Goal:</b>    | \$100.00                                    |
| <b>Registration Status:</b> | Active                                      |
| <b>Personal Page:</b>       | <b>Private</b>                              |
| <b>Team Name:</b>           | Team Hope                                   |
| <b>Team Rank:</b>           | Member                                      |

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.

| Name        | Action                    | Email          | TeamRaiser Name    |
|-------------|---------------------------|----------------|--------------------|
| Jones, Bear | <b>Manage Participant</b> | bear@email.com | RFL CY15 Hope City |

5. From the participant record, under **Related Actions** (left hand side of the page), click **Change Team**.

**Customer Service > Manage Participants > Manage Participant**

**Related Actions**

- ▶ [Record Donation](#)
- ▶ [Edit Contact Information](#)
- ▶ [Edit Registration](#)
- ▶ [Make Inactive](#)
- ▶ [Make Private](#)
- ▶ [Create New Team](#)
- ▶ **Change Team**
- ▶ [Edit Pages](#)

This is a summary that shows the contact, registration, Personal Page, team, and fundraising information you can work with this information.

|                             |  |
|-----------------------------|--|
| <b>Name:</b>                | Bear Jones                                       |
| <b>Email:</b>               | bear@email.com                                   |
| <b>Username:</b>            | bearbear5656                                     |
| <b>Participation Type:</b>  | Team Captain Registration (Pay by Cash or Check) |
| <b>Registration Type:</b>   | Online   |
| <b>Fundraising Goal:</b>    | \$500.00   |
| <b>Registration Status:</b> | Active   |
| <b>Personal Page:</b>       | Public   |

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**.

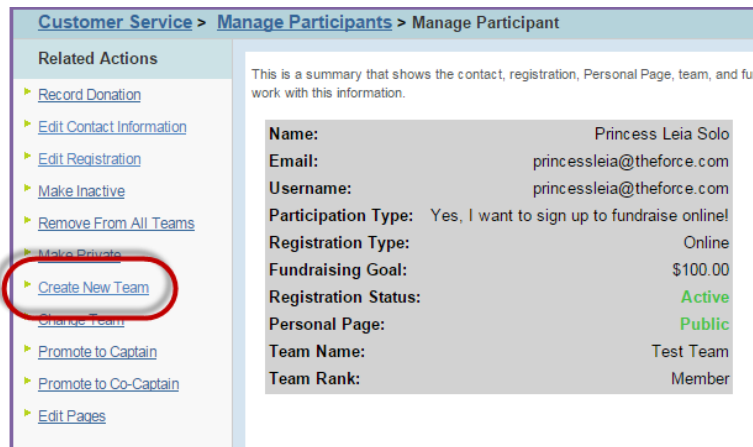
### Create a New Team with a Participant as Team Captain

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.

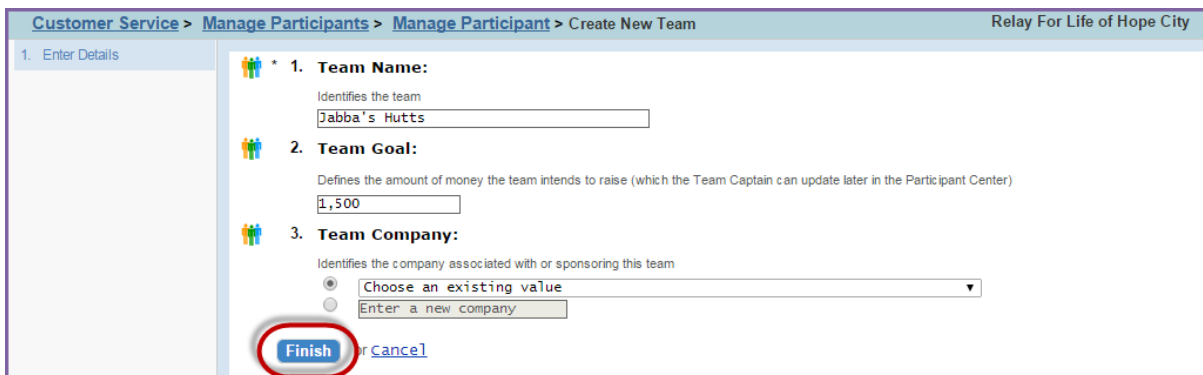
| Name                | Action                    | Email                     | TeamRaiser Name                |
|---------------------|---------------------------|---------------------------|--------------------------------|
| Solo, Princess Leia | <b>Manage Participant</b> | princessleia@theforce.com | RFL CY15 National Community BP |

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

- From the participant record, under **Related Actions** (left hand side of the page), click **Create New Team**.



- Enter the new **Team Name**, **Goal**, and Choose a **Company** (if necessary).



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

## Promote or Demote Team Members and Team Captains

- From the EMC, click **Customer Service**.
- Under Related Actions, select **Manage Participants**.
- A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.
- Click **Manage Participant** to access the participant's profile.
- From the participant record, under **Related Actions**, click **Promote to Captain** or **Promote to Co-Captain**, depending on the desired leadership level.
  - Click **Finish** to save.



Event Center | Event Emails | Customer Service | Reports

Customer Service > Manage Participants > Manage Participant

**Related Actions**

- ▶ [Record Donation](#)
- ▶ [Edit Contact Information](#)
- ▶ [Edit Registration](#)
- ▶ [Make Inactive](#)
- ▶ [Remove From All Teams](#)
- ▶ [Make Private](#)
- ▶ [Create New Team](#)
- ▶ [Change Team](#)
- ▶ [Promote to Captain](#)
- ▶ [Promote to Co-Captain](#)
- ▶ [Edit Pages](#)

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

|                             |  |
|-----------------------------|--|
| <b>Name:</b>                | Jumping Joe                                      |
| <b>Email:</b>               | joe@jumping.com                                  |
| <b>Username:</b>            | jumpingjoelasdfdsa                               |
| <b>Participation Type:</b>  | Team Captain Registration (Pay by Cash or Check) |
| <b>Registration Type:</b>   | Online   |
| <b>Fundraising Goal:</b>    | \$100.00   |
| <b>Registration Status:</b> | Active   |
| <b>Personal Page:</b>       | Public   |
| <b>Team Name:</b>           | JUMPING  |
| <b>Team Rank:</b>           | Member   |

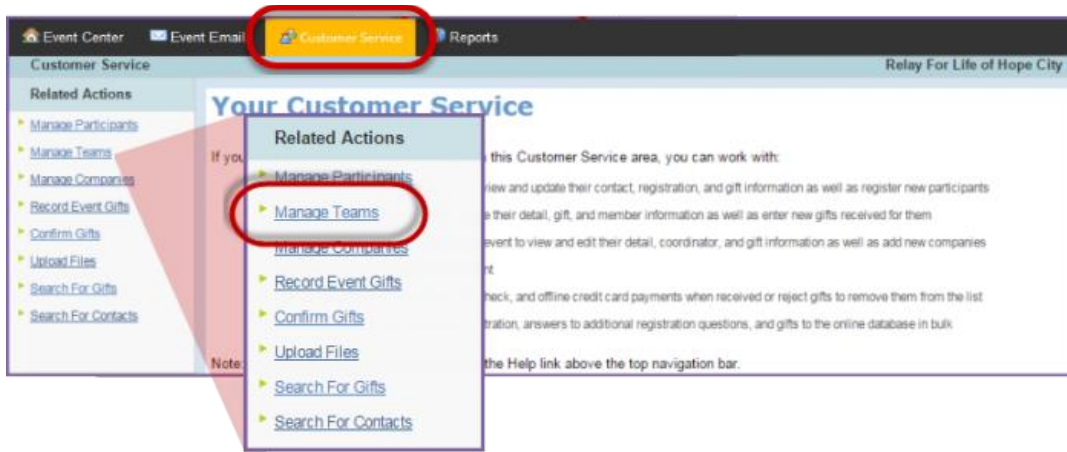
6. For “Team Captains” you wish to demote to Team Member Status:
  - a. Begin by promoting a new team captain by clicking the **Promote to Captain** link on the left hand side under Related Actions within the record of the participant who is becoming the new leader.
  - b. Once a new participant has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

# Chapter 7: Customer Service – Manage Teams

- [Search for a Team](#)
- [View Team Member Roster](#)
- [View Team’s Gift History](#)
- [Edit a Team’s Registration Information](#)

## Search for a Team

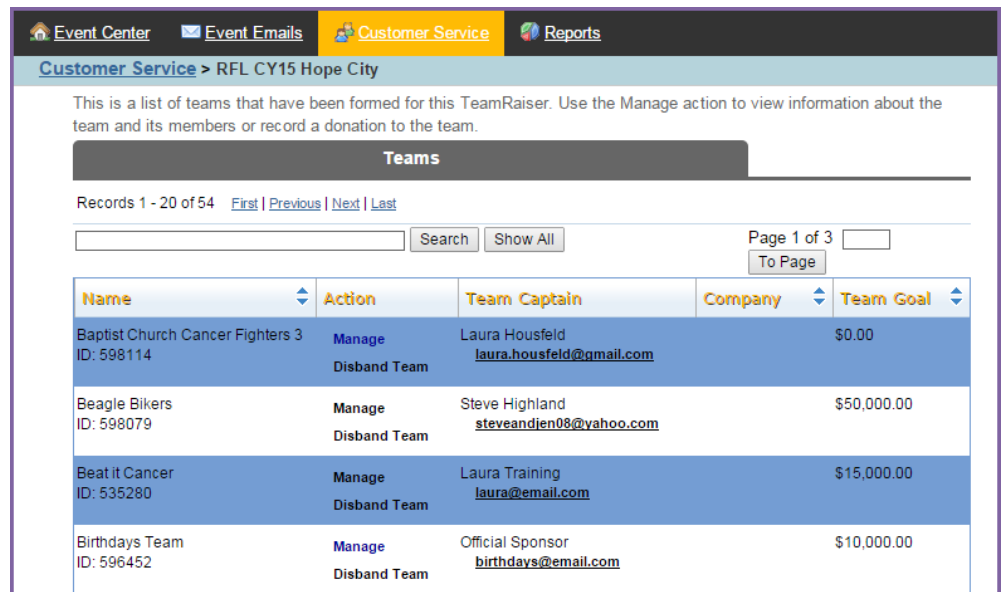
1. From the EMC, click **Customer Service** in the top Navigation Bar.
2. Under Related Actions, select **Manage Teams**.



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

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

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



## View Team Member Roster

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

| Name                     | Action        | Team Captain  | Company | Team Goal  |
|--------------------------|---------------|---|---------|------------|
| Test Team<br>ID: 1682129 | <b>Manage</b> | Testy Testerson<br><a href="mailto:test@tes.com">test@tes.com</a> |         | \$1,000.00 |

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.

The screenshot displays the Salesforce interface for a team profile. The breadcrumb trail is "Customer Service > RFL CY15 National Community BP > Test Team". The page title is "Relay For Life of Hope City". Under "Related Actions", there are links for "Edit Team Details" and "Record Team Donation". The main content area shows "Test Team (ID: 1682129)" with details for the Captain (Testy Testerson) and statistics (Active Members: 5, Team Goal: \$1,000.00, Confirmed Gifts: \$360.00 (36.00%), Total Gifts: \$360.00 (36.00%)). At the bottom, the "Members" tab is selected, showing a list of team members with columns for Name, Action, and Email. The "Members" tab is circled in yellow, and the entire list area is enclosed in a red box.

| Name                       | Action             | Email  |
|----------------------------|--------------------|--|
| Jane Doe_Test              | Manage Participant | <a href="mailto:janedoe@gmail.com">janedoe@gmail.com</a>                   |
| Sally Jobs_Test (inactive) | Manage Participant | <a href="mailto:agutierrez-test@convio.com">agutierrez-test@convio.com</a> |
| Sophia Latto               | Manage Participant | <a href="mailto:sophia.latto@blackbaud.com">sophia.latto@blackbaud.com</a> |
| Princess Leia Solo         | Manage Participant | <a href="mailto:princessleia@theforce.com">princessleia@theforce.com</a>   |
| Testy Testerson(captain)   | Manage Participant | <a href="mailto:test@tes.com">test@tes.com</a>                             |

## 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.

| Name                     | Action        | Team Captain  | Company | Team Goal  |
|--------------------------|---------------|---|---------|------------|
| Test Team<br>ID: 1682129 | <b>Manage</b> | Testy Testerson<br><a href="mailto:test@tes.com">test@tes.com</a> |         | \$1,000.00 |

- 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.](#)

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

Related Actions

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

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

**Test Team (ID: 1682129)**

|  |  |
|--|--|
| Captain:<br><b>Testy Testerson</b><br>123 Hope Street<br>Hope City, NY 12345<br><a href="mailto:test@tes.com">test@tes.com</a> | Active Members: 4<br>Team Goal: \$1,000.00<br>Confirmed Gifts: \$360.00 (36.00%)<br>Total Gifts: \$360.00 (36.00%) |
|--|--|

**Gifts** **Members**

Records 1 - 5 of 5 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Page 1 of 1  
To Page

| Name           | Action  | Gift Type                | Gift Date  | Amount   | On Behalf of       |
|----------------|---|--------------------------|------------|----------|--------------------|
| Darth Vader    | <a href="#">View/Edit</a><br><a href="#">Change Soft Credit</a> | Offline Confirmed (Cash) | 11/13/2014 | \$25.00  | Princess Leia Solo |
| John Doe_Test  | <a href="#">View/Edit</a><br><a href="#">Change Soft Credit</a> | Offline Confirmed (Cash) | 07/18/2014 | \$10.00  | Team               |
| Michael Jordan | <a href="#">View/Edit</a><br><a href="#">Change Soft Credit</a> | Offline Confirmed (Cash) | 11/13/2014 | \$200.00 | Princess Leia Solo |
| Test1 Donation | <a href="#">View/Edit</a><br><a href="#">Change Soft Credit</a> | Offline Confirmed (Cash) | 11/07/2014 | \$100.00 | Princess Leia Solo |
| Test2 Donation | <a href="#">View/Edit</a><br><a href="#">Change Soft Credit</a> | Offline Confirmed (Cash) | 11/07/2014 | \$25.00  | Jane Doe_Test      |

Records 1 - 5 of 5 [First](#) | [Previous](#) | [Next](#) | [Last](#)

## Edit a Team's Registration Information

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

| Name                     | Action        | Team Captain  | Company | Team Goal  |
|--------------------------|---------------|---|---------|------------|
| Test Team<br>ID: 1682129 | <b>Manage</b> | Testy Testerson<br><a href="mailto:test@tes.com">test@tes.com</a> |         | \$1,000.00 |

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

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


**Related Actions**


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


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

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

6. Make changes to the team's online registration as needed:
  - a. **Team Name:** Edit the team name.
  - b. **Team Goal:** Update the team fundraising goal.
  - c. **Team Company:** Associate the team with a company.
  - d. Click **Finish** to complete the changes.

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

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

 **3. Team Company:**  
Identifies the company associated with or sponsoring this team  
  ▼

or [Cancel](#)

## Chapter 8: Customer Service – Manage Companies

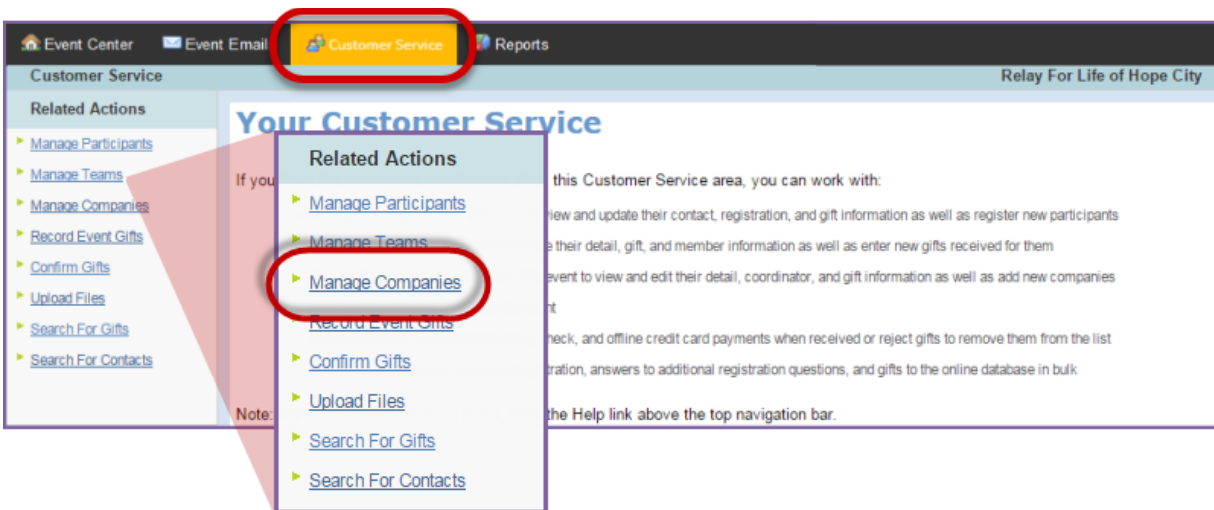
- [Add a Local Company](#)
- [Edit the Local Company Details](#)

### 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 sponsor commitment form and the donation associated with that commitment in hand.

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

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.*

The screenshot shows a Salesforce interface with the title "Create a new constituent or select an existing one". It features three rows of constituent information. The first row is under a "Create" tab and contains fields for Title, First Name (Amy), Last Name (Delosier), Suffix, Email, Phone, Street 1 (237 N. Railroad St. Apt. 7), Street 2, City (Palmyra), State/Province (PA), Zip/Postal Code (17078), and Country (United States). The second row is under a "Select" tab and contains the same fields, but with a green checkmark over the "Select" tab and a red box around the row. The third row is also under a "Select" tab and contains the same fields, but with a red box around the row. At the bottom of the interface, there are "Next" and "Cancel" buttons.

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](#).*

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

**Customer Service** > RFL CY15 National Community BP | Relay For Life of Hope City

**Related Actions**

- ▶ [Add a new company](#)

This is a list of the prospect and confirmed companies that can be associated with teams participating in this TeamRaiser or may be sponsors of the event. (Note that companies may be both.) To work with the details and contacts of a company, use Edit Company. To work with the gifts, fundraising thermometer, and public-facing page for a company, use Manage Company. To add sponsor information to a company that can be associated with teams, use the Define Sponsorship Details action displayed after the company is created.

**- Local Companies -**

Records 1 - 3 of 3 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Page 1 of 1

| Company Name:      | Action   | Company Gifts |
|--------------------|--|---------------|
| Acme Testing, Inc. | <a href="#">Edit Company</a><br><a href="#">Manage Company</a><br><a href="#">Define Sponsorship Details</a><br><a href="#">Delete Company</a> | \$0.00        |
| Aperture Science   | <a href="#">Edit Company</a><br><a href="#">Manage Company</a><br><a href="#">Define Sponsorship Details</a><br><a href="#">Delete Company</a> | \$0.00        |
| Awesome Computers  | <a href="#">Edit Company</a><br><a href="#">Manage Company</a><br><a href="#">Define Sponsorship Details</a><br><a href="#">Delete Company</a> | \$2,000.00    |

Records 1 - 3 of 3 [First](#) | [Previous](#) | [Next](#) | [Last](#)

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](http://helpme.cancer.org).

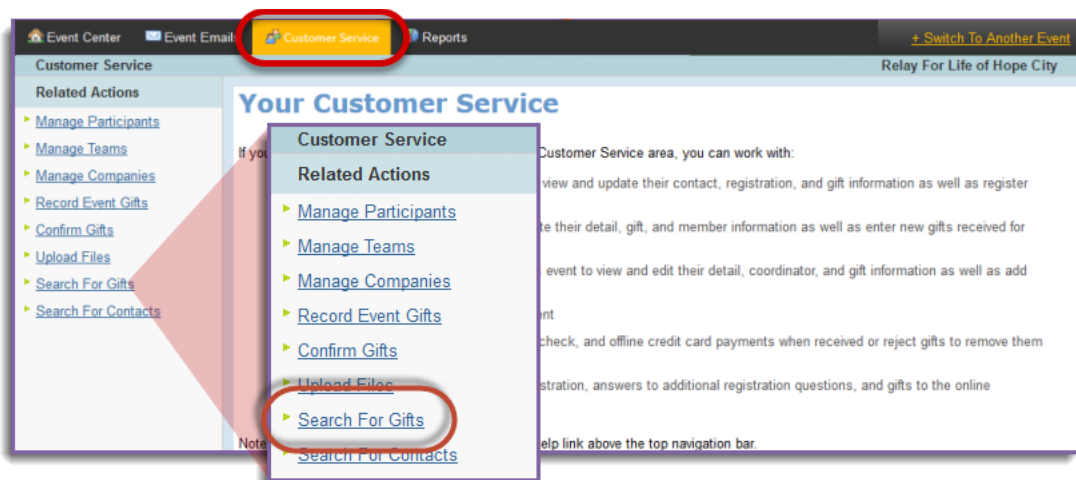


## Chapter 9: Customer Service – Manage Gifts

- [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**.

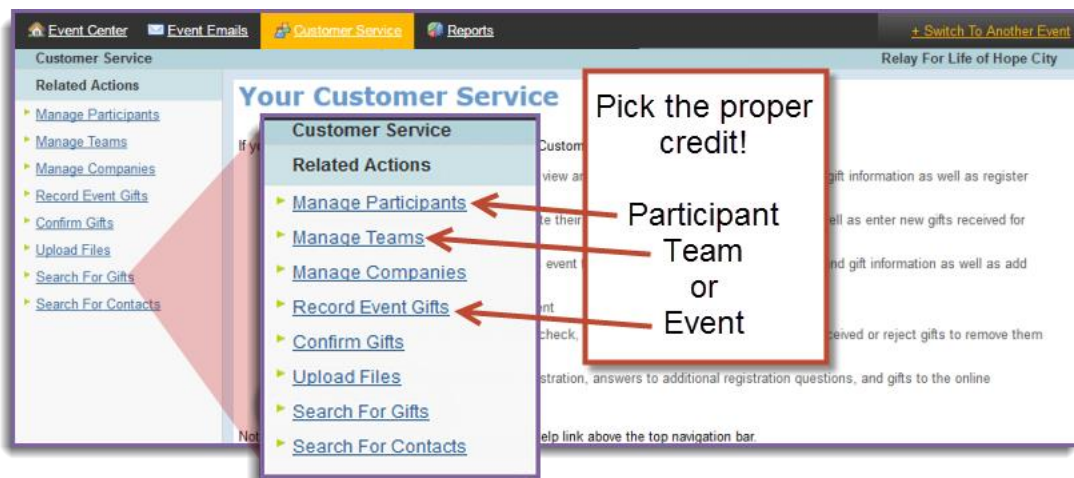


3. Enter any information you know about the donor and/or donation, including:
  - a. Donor's first / last name or email address
  - b. Participant's name who the donation is credited to
  - c. Confirmation code of the donation as listed on the gift receipt
  - d. Value of the donation
  - e. When the 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.

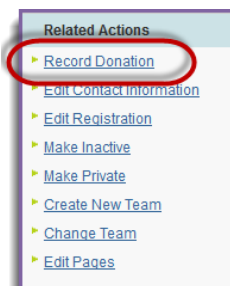
A screenshot of the 'Search For Gifts' form in the Customer Service interface. The form is titled '1. Gift Search' and contains several input fields for search criteria: 'Donor First Name:', 'Donor Last Name:', 'Donor Email:', 'Participant First Name:', 'Participant Last Name:', 'Participant Email:', and 'Confirmation Code:'. Below these fields are 'Gift Amount Between:' fields for 'Low Value:' and 'High Value:', and 'Date Range:' fields for 'Start Date:' (Jun 4 2014) and 'End Date:' (Jan 12 2015). At the bottom of the form, there are 'Finish' and 'Cancel' buttons.

## 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’



Customer Service > Manage Participants > Manage Participant > Amy Delozier

1. Enter Donor Information

2. Configure Gift

**1. Donor Information:**

Specifies the Profile information in the constituent record of this participant (Note: If the gift payment will be made with a credit card or bank account withdrawal, the name here must match exactly with the name on the corresponding credit card or bank account.)

| Title | First Name | Middle Name | Last Name | Suffix | Professional Suffix |
|-------|------------|-------------|-----------|--------|---------------------|
|       | Michael    |             | Scott     |        |                     |

Address 1:

Address 2:

City:

State / Province:

ZIP / Postal Code:

Country:

Email:

Phone:

of

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.

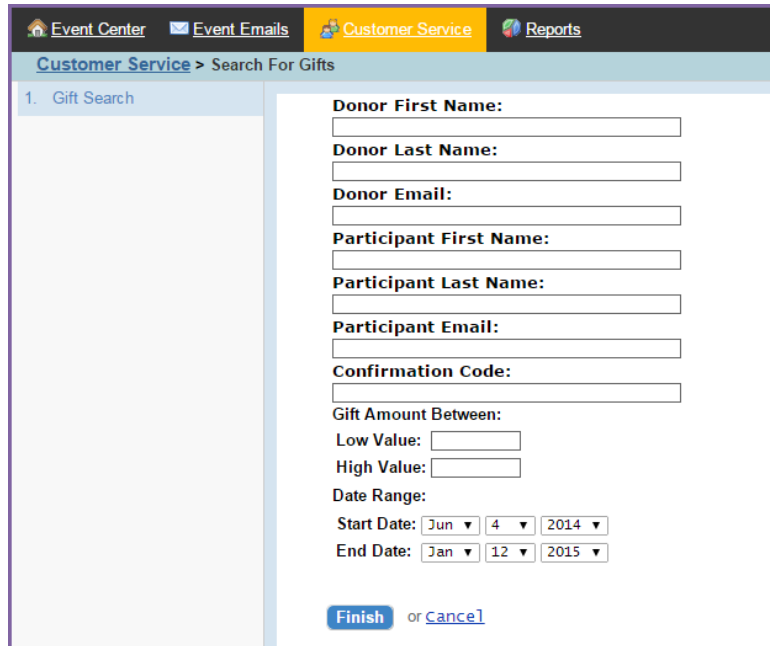
6. For Step 2 – **Configure Gift**, specify the following:
  - a. Gift Type – defaulted to one time gift
  - b. Gift Amount – enter the monetary amount of the single payment or of each payment to be received for the sponsorship level
  - c. Do Not Display Amount – check this box if the amount is not 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.

## 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.



The screenshot shows the 'Customer Service > Search For Gifts' interface. It features a sidebar with '1. Gift Search' and a main form area with the following fields:

- Donor First Name:
- Donor Last Name:
- Donor Email:
- Participant First Name:
- Participant Last Name:
- Participant Email:
- Confirmation Code:
- Gift Amount Between:
  - Low Value:
  - High Value:
- Date Range:
  - Start Date: Jun 4 2014
  - End Date: Jan 12 2015

At the bottom, there is a blue 'Finish' button and a 'Cancel' link.

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

|                    |                  |                               |            |          |
|--------------------|------------------|-------------------------------|------------|----------|
| Michael Jordan     | <b>View/Edit</b> | Offline Confirmed (Cash) Gift | 11/13/2014 | \$200.00 |
| Change Sort Credit |                  |                               |            |          |

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.

- Click **Finish** to save changes to the donation's appearance in the Honor Roll.

Customer Service > Manage Participants > Manage Participant > Amy\_TEST Delozier Relay For Life of Hope City

1. Enter Donor Information

2. Configure Gift

**1. Gift Amount:**  
For a One time gift, enter the amount of the donor's gift. For a Recurring gift, enter the amount of each payment to be collected for this gift.  
\$200.00

**2. Gift Category:**  
Identifies the type of gift received

**3. Do Not Display Amount:**  
Determines if the amount of a gift is displayed in gift lists on the site (Note: The donor name may still be visible.)  
 Do not display the gift amount

**4. Recognition Name:**  
Leave this field blank to display the donor's name as you entered it on the previous page. If the donor requests an alternate name (such as Joey or Our Family) to display on Web pages, enter that name in this field. If the donor requests not to display their name, enter the word Anonymous in this field.  
In memory of Stuart Scott

**5. Batch ID:**  
Groups a set of offline gifts being processed at the same time

**6. Payment Method:**  
Click the radio button of the appropriate method by which the gift will be paid or recurring payments will be collected. If you select an option other than cash, additional fields will display for you to complete the payment method.  
 Cash  
 Check

**Process** [Cancel](#)

## Move the Credit of a Donation to another Participant or Team

- From the Event Management Center, click **Customer Service** in the top Navigation Bar.
- Under Related Actions, select **Search for Gifts**.
- Enter any information in the search fields provided, enter the available information about the donation. Click **Finish** to perform the search.

Event Center | Event Emails | Customer Service | Reports

Customer Service > Search For Gifts

1. Gift Search

**Donor First Name:**

**Donor Last Name:**

**Donor Email:**

**Participant First Name:**

**Participant Last Name:**

**Participant Email:**

**Confirmation Code:**

**Gift Amount Between:**  
Low Value:   
High Value:

**Date Range:**  
Start Date: Jun 4 2014  
End Date: Jan 12 2015

**Finish** or [Cancel](#)

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

|  |                           |                               |            |         |
|--|---------------------------|-------------------------------|------------|---------|
| Test2 Donation   | <a href="#">View/Edit</a> | Offline Confirmed (Cash) Gift | 11/07/2014 | \$25.00 |
| <input checked="" type="radio"/> <b>Change Soft Credit</b> |                           |                               |            |         |

- 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**.

Customer Service > Manage Participants > Manage Participant > Change Soft Credit Relay For Life of Hope City

1. Select Type

\* 1. New Soft Credit Recipient  
Determines the type of TeamRaiser entity who will get credit for this gift

TeamRaiser Participant  
 TeamRaiser Team  
 TeamRaiser Event

2. Select Recipient:  
Displays either the Participant Search page for locating the new participant recipient; the Teams List for selecting the appropriate team; or the Confirm changes page if TeamRaiser Event is selected as the new recipient.

[Search for Recipient](#)

[Cancel](#)

- 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.

**Participant List**

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

| Name           | Action                 | Email             | TeamRaiser Name                |
|----------------|------------------------|-------------------|--------------------------------|
| Doe_Test, Jane | <a href="#">Select</a> | janedoe@gmail.com | RFL CY15 National Community BP |

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

[Cancel](#)

- 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 and online donation, or change/refund an offline donation, please log a detailed ticket at [helpme.cancer.org](http://helpme.cancer.org) or call 1-800-227-2345, option 2.

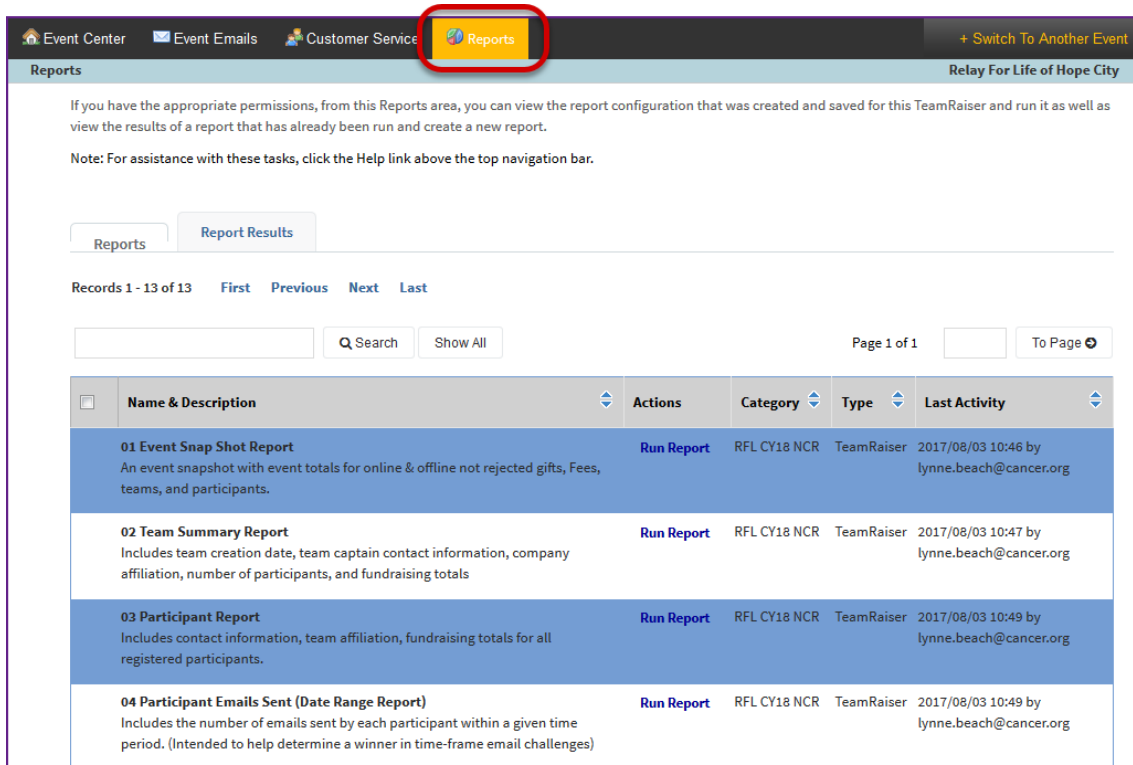
**Note:** Please do not change an offline gift amount as an attempt to correct a gift, as that will lead to discrepancies between website, mobile app and Facebook fundraiser totals.

# Chapter 10: Reports

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

## Access Reports

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



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

[See Appendix 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](#).*

| Name & Description  | Actions    | Category    | Type       | Last Activity                              |
|---|------------|-------------|------------|--|
| 01 Event Snap Shot Report<br>An event snapshot with overall event totals for online & offline not rejected gifts, Online Fees, teams, and participants. | Run Report | RFL CY15 EC | TeamRaiser | 2014/08/22 10:31 by lynne.beach@cancer.org |

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.



**2. Run Report:**

Click Run Report to send this report to the report queue where it will run as scheduled. After it runs, access report results listed on the Report Results tab.

**Run Report**

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.

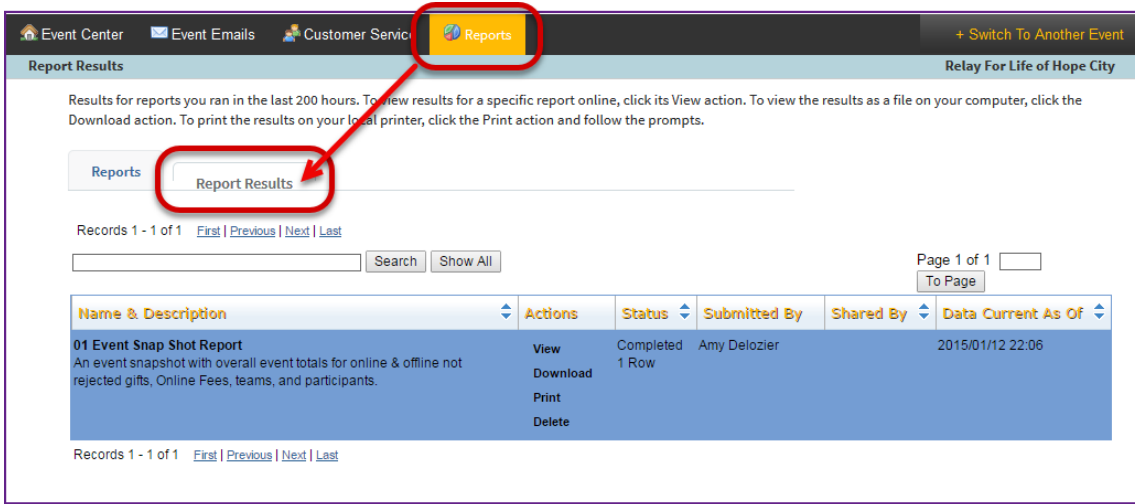


**Note:** *There will be times that reports will not always appear right away and you may need to retrieve your results from the Report Results tab.*

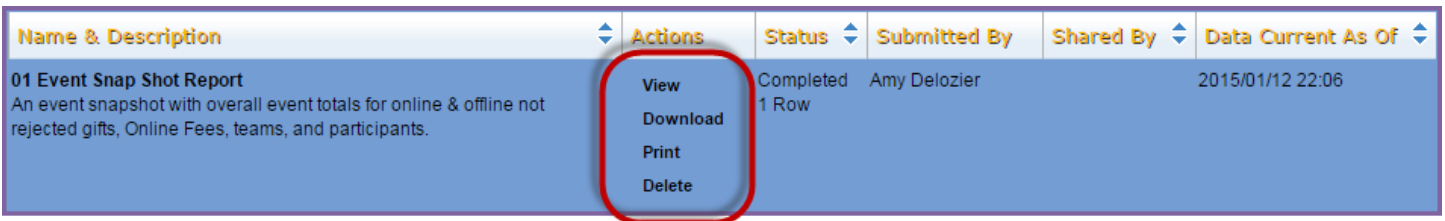
## Utilizing the Report Results Tab

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.



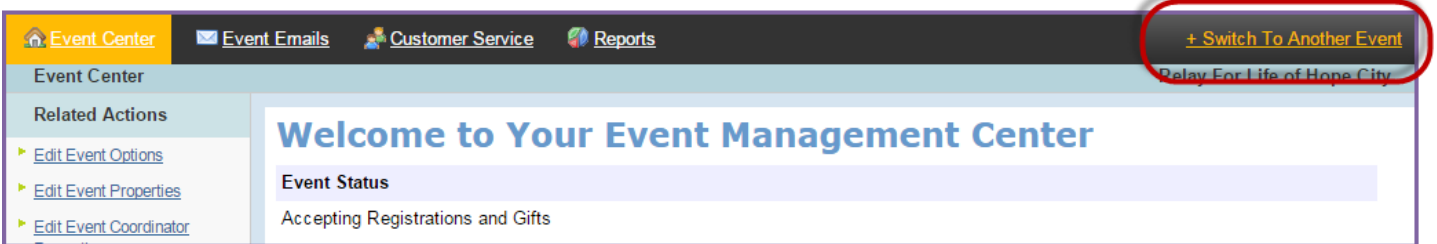


4. Click on the appropriate related actions from the actions column to **View**, **Download**, **Print**, or **Delete** the data.



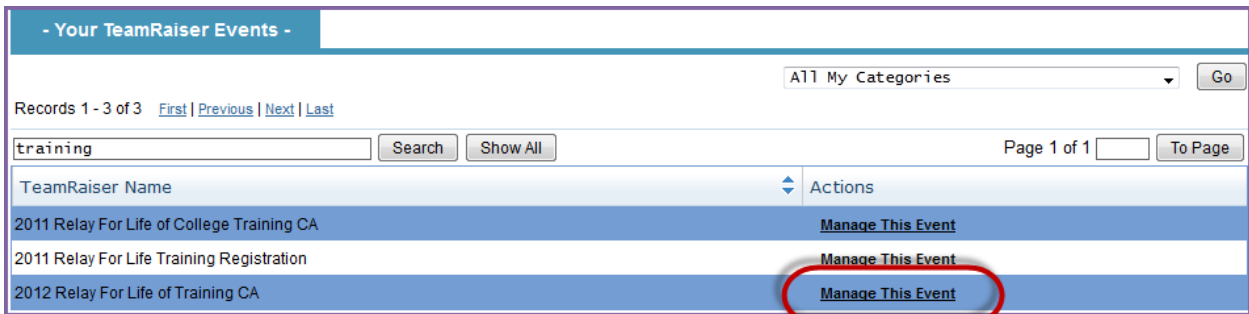
## Accessing Past Event Manager Centers and Reports

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.

# APPENDICES

## 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:

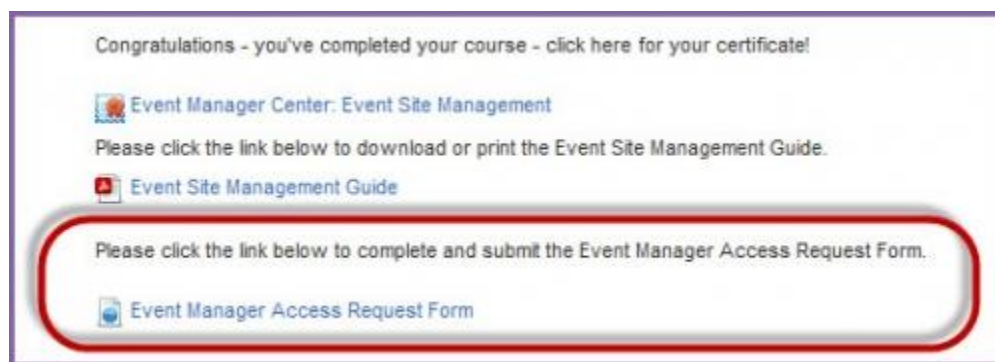
1. Log in to Society Source
2. Under **Quick Links**, click on **Society Pathways**
3. Launch Society Pathways, and locate the webinars by searching for 'Online Event Manager' – there are two: one on Event Site Management, and one on Participant Management
4. Select 'Start' to launch either course
5. 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/>
2. Log in if you are a returning volunteer, or register to create a new account
3. Click on Find Courses
4. Find the webinar you want to listen to by searching for "Event Manager" – there are two: one on Event Site Management, and one on Participant Management
5. Select Yes to enroll in either course
6. Once in the course you can listen to the webinar and/or download the training guide
7. Following the completion of the training module, the volunteer will need to complete the EMC Access Request Form. They will receive access within 2-3 business days.

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



## Appendix B: 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](http://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

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

127335874@N04

#### 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

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

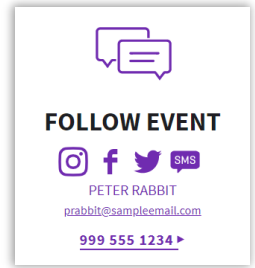
fbVideo=<https://www.facebook.com/RelayForLife/videos/66437895>

2. [Click here](#) for detailed instructions to add a live stream to your Greeting page

**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. iglcon=your-channel-link-here



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

`iglcon=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:



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

`https://www.instagram.com/p/BYeSCpGApZ2/,fbVideo=https://www`

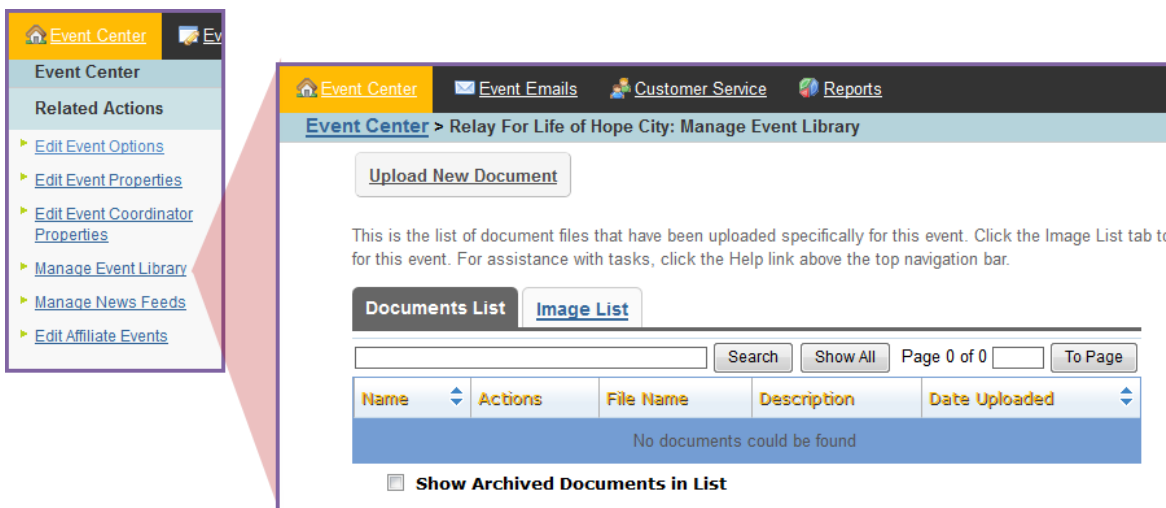
# Appendix C: Manage Event Library

- [Access Event Library](#)
- [Upload a Document to the Library](#)
- [Upload an Image to the Library](#)

## Access Event Library

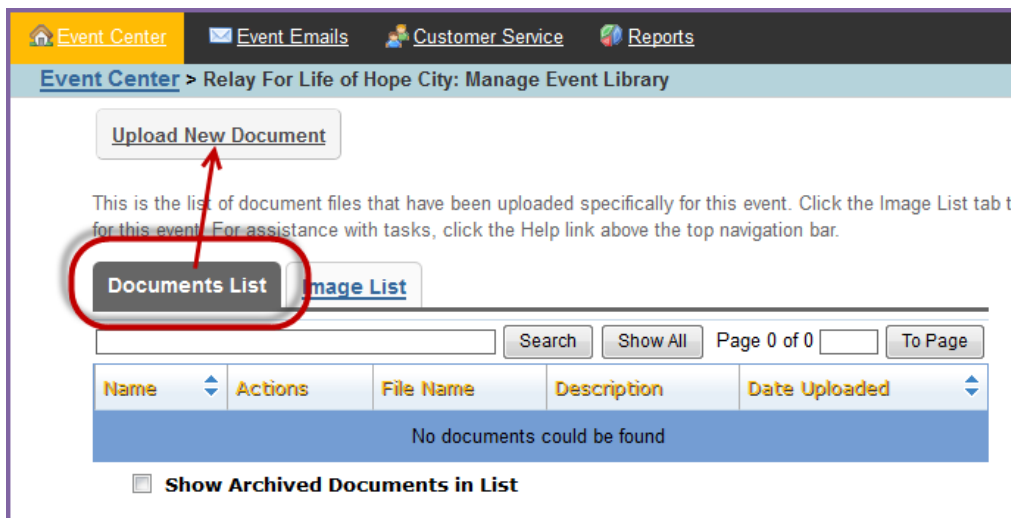
Before adding the photos or documents onto your event emails, you must first upload them to your event library.

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.



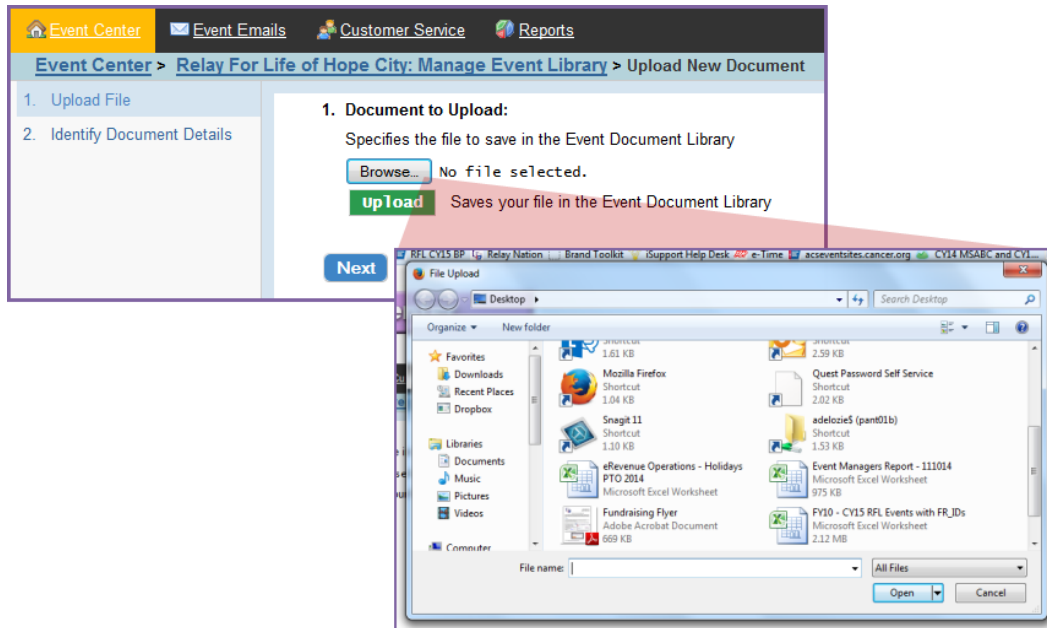
## Upload a Document to the Library

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

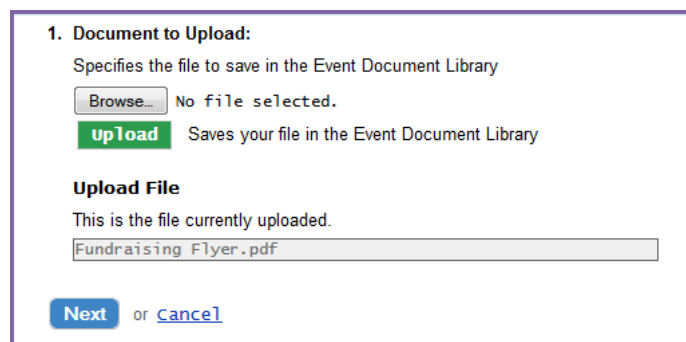


*If you have any questions, please open a [Salesforce Case](#).*

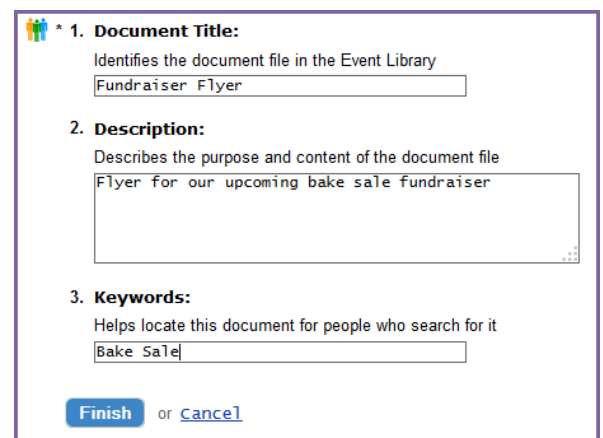
2. **Browse** to find the document on your computer.



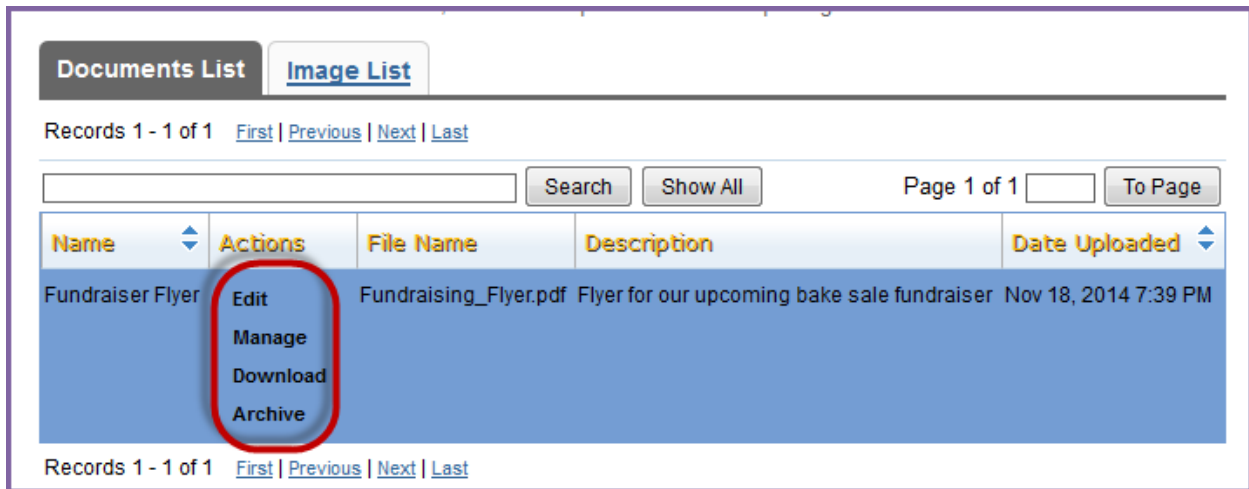
3. Click **Upload** and **Next** once you selected the document you would like to add to the library.



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.



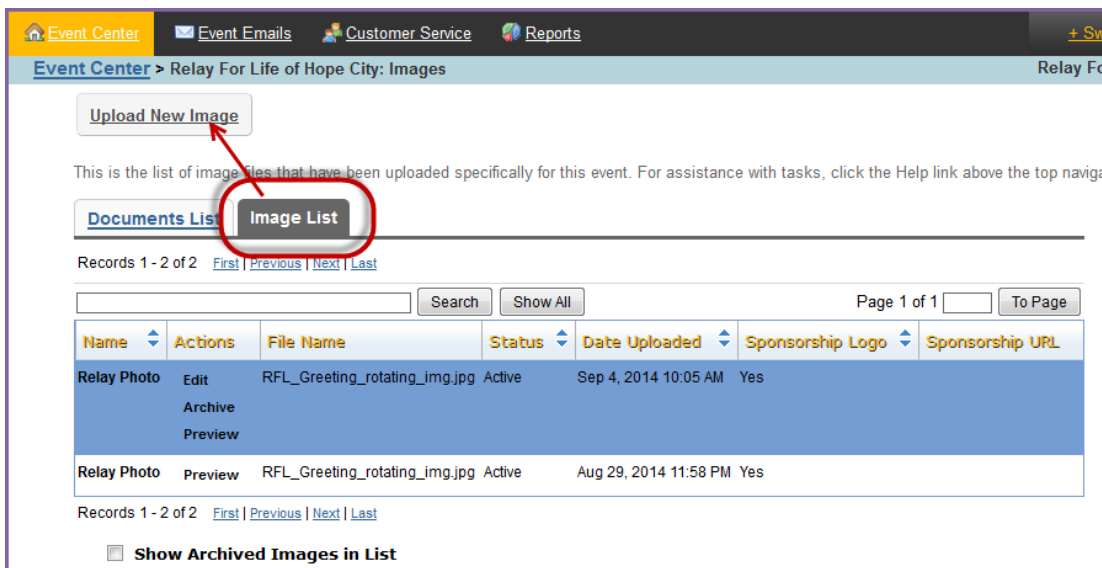
5. Click **Finish** and the document will be added to your library.
6. Once a document is uploaded, there are a few options available for the management of your document library:



- 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

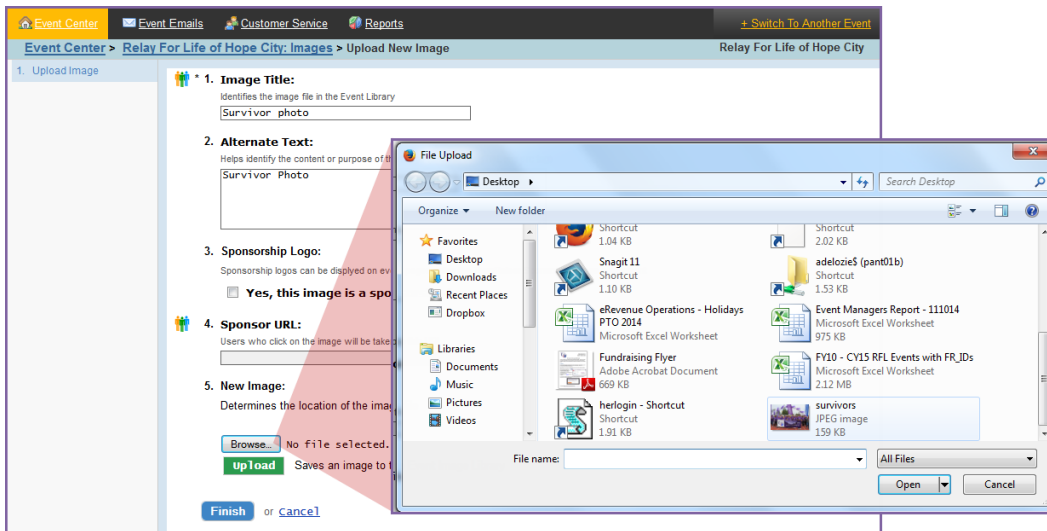
1. From the EMC, click **Event Center** and under Related Actions select Manage Event Library.
2. From the **Image List** tab, click **Upload New Image**.



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:

| Documents List                   |                            | Image List                    |        |                       |                  |                 |
|----------------------------------|----------------------------|-------------------------------|--------|-----------------------|------------------|-----------------|
| Name                             | Actions                    | File Name                     | Status | Date Uploaded         | Sponsorship Logo | Sponsorship URL |
| Relay Photo                      | Preview                    | RFL_Greeting_rotating_img.jpg | Active | Aug 29, 2014 11:58 PM | Yes              |                 |
| Relay Photo                      | Edit<br>Archive<br>Preview | RFL_Greeting_rotating_img.jpg | Active | Sep 4, 2014 10:05 AM  | Yes              |                 |
| Survivor photo<br>Survivor Photo | Edit<br>Archive<br>Preview | survivors.jpg                 | Active | Nov 24, 2014 7:18 PM  | No               |                 |

- 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.

# 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 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.”

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

Reference Link: [http://www.cancer.org/docroot/SU/content/SU\\_1\\_4\\_Privacy\\_Statement.asp?sitearea=SU](http://www.cancer.org/docroot/SU/content/SU_1_4_Privacy_Statement.asp?sitearea=SU)

## The CAN-SPAM Act: Requirements for Emailers

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

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

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

### **What the Law Requires**

The CAN-SPAM law requires that 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.

Reference Link: <http://business.ftc.gov/documents/bus61-can-spam-act-compliance-guide-business>

## **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.

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

- 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 look 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

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

## Tips for Reducing Email Spam Risk

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

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

# Appendix 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.

1. Select Delivery Type  
2. Select Participation Types  
3. Select Registration Filters  
4. Select Team Filters  
5. Review Delivery Details

Related Actions  
Configure Additional Filters

1. Previous Event Participation Filter:  
Select the appropriate option to determine which participants currently registered for this event should be sent this email message.

- All current participants regardless of previous participation
- Current participants who also participated in the previous event
- Current participants who did not participate in the previous event

2. Online/Offline Registration Filter:  
Select the appropriate option to determine which participants currently registered for this event should be sent this email message based on how they registered for the event.

- All current participants regardless of their online or offline registration method
- Current participants who registered online
- Current participants who registered offline

3. Date Range:  
 Send to current participants registered during the following dates

Start Date: Sep 22 2016  
End Date: Sep 22 2016

Next or Cancel

Click **NEXT** to apply your filters.

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

1. Select Delivery Type  
2. Select Participation Types  
3. Select Registration Filters  
4. Select Team Filters  
5. Review Delivery Details

Related Actions  
Configure Additional Filters

1. Select Delivery Type  
2. Select Participation Types  
3. Select Registration Filters  
a. Donations Received  
b. Participant Emails  
c. Unconfirmed Gifts  
4. Select Team Filters  
5. Review Delivery Details

- 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).

1. Select Delivery Type  
2. Select Participation Types  
3. Select Registration Filters  
a. Donations Received  
b. Participant Emails  
c. Unconfirmed Gifts  
4. Select Team Filters  
5. Review Delivery Details

1. Minimum Number of Donations:  
Enter the number of donations that a participant must have received in order to be sent this email message.

2. Maximum Number of Donations:  
Enter the number of donations that a participant must have received in order to be excluded from this mailing.

3. Minimum Donation Amount:  
Enter the monetary amount that a participant must have raised in order to be sent this email message.

4. Maximum Donation Amount:  
Enter the monetary amount that a participant must have raised in order to be excluded from this mailing. (Note: Enter whole numbers only.)

5. Self Donor Status Filter:  
Select the appropriate option below to determine which participants should be sent this email message based on if they made a donation to their own fundraising effort.

- All participants regardless of self donor status
- Self donor participants (who have made a donation to their own fundraising effort)
- Participants who have not made a donation to their own fundraising effort

Next or Cancel

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!

1. Select Delivery Type  
2. Select Participation Types  
3. Select Registration Filters  
a. Donations Received  
b. Participant Emails  
c. Unconfirmed Gifts  
4. Select Team Filters  
5. Review Delivery Details

**1. Minimum Number of Emails Sent by Participant:**  
Enter the number of emails that a participant must have sent from their Participant Center in order to be sent this email message.

**2. Maximum Number of Emails Sent by Participant:**  
Enter the number of emails that a participant must have sent from their Participant Center in order to be excluded from this mailing.

Next or Cancel

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

1. Select Delivery Type  
2. Select Participation Types  
3. Select Registration Filters  
a. Donations Received  
b. Participant Emails  
c. Unconfirmed Gifts  
4. Select Team Filters  
5. Review Delivery Details

**1. Minimum Number of Unconfirmed Gifts:**  
Enter the number of outstanding unconfirmed gifts that a participant must have in their Gift History in order to be sent this email message. (Participants who have less than this number will not be sent this email.)

Finish or Cancel

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.

1. Select Delivery Type  
2. Select Participation Types  
3. Select Registration Filters  
4. Select Team Filters  
5. Review Delivery Details

**1. Team Membership Filter:**  
Select the groups of people participating on a team that should be sent this email message. (Note: To exclude a group of team participants from this mailing, remove the checkmark from its checkbox.)

Individual participants not on a team  
 Team members  
 Team captains  
 Company coordinators of teams

**2. Company Affiliation Filter:**  
Select the appropriate option to determine which participants will be sent this email message based on their association with a company.

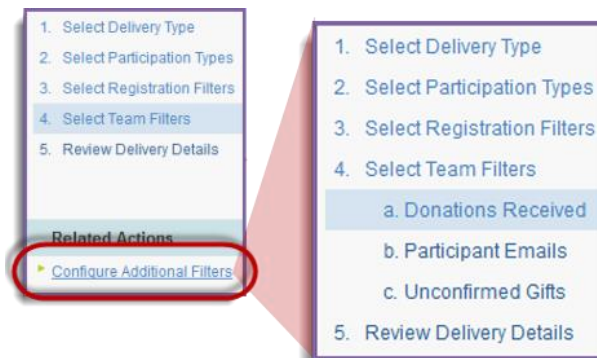
All participants whether company affiliated or not  
 Participants affiliated with any company team  
 Participants affiliated with the following company

**Name of the Specific Company:**

Next or Cancel

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.

## 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.

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



## **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