

EXERCISE 2.1: Managing Participants

Searching for a Participant

1. From the **TeamRaiser List** page, click **Manage** next to the **Step Towards Recovery 2008** event
2. Type in your name in a search field and click the **Search This TeamRaiser** button
3. Click on your name in the **Participant List**

View the Participant's Personal Page

1. Click the **View** link next to **Personal Page** in the **Registration Information** box

Assign the Participant to a Team

1. Click the **Change team membership** link next to **Team Name** in the **Registration Information** box
2. From the **Team List** select the **Cutters** team
3. Note the change next to **Team Name**

EXERCISE 2.2: Managing Teams

Searching for a Team

1. Click the **Teams** tab near the top of the page
2. Click **Manage** next to the **Cutters** team

Viewing the Team Details

1. Click the **Edit Team Details** link in the **Related Actions** column
2. Note the editable details and click **Finish**

Viewing the Team Members

1. Click the **Members** tab next to the **Gifts** tab

EXERCISE 2.3: Managing Gifts

View the Participant's Gift History and Enter an Offline Gift

1. Search for a participant by entering your name
2. Note the donation in the **Gift History** section
3. Click the **Enter Offline Gift** link
4. Click the **Create a New Donor** button
5. Enter a different name and email address and click **Create**
6. Enter a **Gift Amount** and **Recognition Name**
7. Select the **Check** button and enter a **Check Number**
8. Click **Process**
9. Again, note the donation in the **Gift History** column

Donor Name: _____

Donor Email: _____

Enter an Offline Team Gift

1. Search for the **Cutter** team and click **Manage** next to the team
2. Click the **Record Team Donation** link under **Related Actions**
3. Click the **Search For Existing Donor** button
4. Search for the person you created in the previous exercise
5. Click **Select** next to that person's name in the **Actions** column
6. Fill out a **Gift Amount** and **Recognition Name** and select **Check**
7. Enter a check number and click **Process**

Change a Soft Credit

1. From the **Fundraising** drop-down menu, select **Transactions**
2. Using any of the first three search fields, search for the donor listed above
3. Click **Change Soft Credit** in the **Actions** column next to the correct transaction
4. Make sure **TeamRaiser Participant** is selected and click the **Search** button
5. Enter your information and select the **Step Towards Recovery 2008** TeamRaiser
6. Click **Next**
7. Click **Select** next to the participant
8. Confirm the change and click **Finish**

EXERCISE 2.4: Managing Companies

Add a New Company

1. Click the **Local Companies** tab near the top of the page
2. Click the **Add a New Company** link in the **Related Actions** column
3. Create a new company name and click **Next**
4. Click **Finish**

EXERCISE 2.5: Configuring Coaching Emails

Create a New Message

1. Click the **Coaching Emails** tab
2. Click the **Create a new message** button
3. Configure the message as you would a regular email message
4. Once you have approved the message, click the **Set Up Deliver** button
5. Select the **Current Events Participants** button and click **Next**
6. Click the **Add All** button and then click **Next**
7. Note the available filters and click the **Configure Additional Filters** link in the **Related Actions** column
8. Note the available filters and click **Next**
9. Note the available filters and click **Next**
10. Note the available filters and click **Finish**
11. Click **Next**
12. Note the available filters and click **Next**
13. Follow the process for sending a regular email message

EXERCISE 2.6: Reporting

Run a Reports Classic Report

1. From the **Data Management** drop-down menu, select **Reports**
2. Expand the **TeamRaiser Reports** folder
3. Click the **Participant Registration Report** link
4. Select **Step Towards Recovery 2008** from the drop-down menu and label the report
5. Click the **Submit Report** button
6. Continue to click the **Refresh This Report** button until the results are completed
7. Click **View** to see the results on-screen
8. Click **Download** and view the report using Excel

Create and Run a Report Writer Report

1. Select the **Report Writer** tab
2. Click the **Create a New Report** button
3. Select **TeamRaiser** from the drop-down menu
4. Click the **Gift Details** button from the **Available Reports** and click **Next**
5. Configure the report columns as desired and click **Next**
6. Click **Next**
7. Click the **Edit** link in the **Actions** column
8. Click the **More...** link
9. Select the **Step Towards Recovery 2008** and click **Apply**
10. Uncheck the **Edit at Runtime** box
11. Click **Next**
12. Label the report and click **Next**
13. Click the **Run Report** button
14. Click **Next**
15. Click the **Run Report** button

EXERCISE 2.7: Cumulative Participant Exercise

Please complete the following...

For the participant **Sachin Wadhawan**:

1. Has he reached his fundraising goal?
2. How many gifts has he received?
3. For which participation type did he register?
4. What did he record as his t-shirt size?

EXERCISE 2.8: Cumulative Teams Exercise

Please complete the following...

For the team **For the Folks**:

1. What is the Team Goal?
2. How many members are on the team?
3. What is the company associated with this team?
4. Which team member received a \$1000 donation?

EXERCISE 2.9: Cumulative Gifts Exercise

Please complete the following...

For the participant **Kelli Anderson**:

1. How many confirmed gifts does she have?
2. For the gift from Tony Romo, find where you would change the display name.
3. Find and click the **Change Soft Credit** link for the gift from Tony, but do not actually change it.

Hint: Date range should be set to Jan 1, 2008 to present