Convio Online Marketing & Fundraising 140: TeamRaiser Workshop

convio®

Welcome to Convio Online Marketing & Fundraising 140: TeamRaiser Workshop!

The next day will be an intense learning experience; however, we will provide plenty of breaks. Please feel free to help yourself to complimentary soda and snacks. This training class is a wonderful opportunity to network with other nonprofit organizations.

Convio Online 140: TeamRaiser Workshop will provide a strong foundation for your use of the TeamRaiser application. Convio offers additional resources for developing a deeper understanding of the applications and modules. Please visit the Convio Customer Center (http://customer.convio.com) for links to recorded and live online and classroom trainings.

You will complete an in-class evaluation the last day of class, and Convio Education Services will also send you a post-evaluation 6 weeks after the class. Your candid feedback on each evaluation helps us continuously improve our training program as well as our product.

Again, welcome to Convio Training!

Sincerely,

Convio Education Services

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Welcome and Review

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Overview

The Event Management Center is a tool for event managers to create and manage their TeamRaiser events online without having to access the Administrator side of a Convio site. The tool is easy to access, easy to use, and allows an Administrator to set various levels of permissions.

Welcome and Introductions

Welcome & Introductions

- Your Name
- Your Organization
- TeamRaiser Event Name
- Is This Your First Convio TeamRaiser Event?
- Other Convio Products You are Using
- Your Experience Level with Convio

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Housekeeping

Housekeeping

- **Lunch**
  - On your own; computers are bookmarked
- **Drinks and Snacks**
  - Help yourself to complimentary refreshments
- **Breaks**
  - We typically take a break every 1.5 hours
  - Feel free to break individually as needed

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Agenda

Agenda

9:00	Introductions Concepts and Overview
9:15	TeamRaiser Configuration
12:00	**LUNCH**
1:00	Account Manager Presentation
1:30	TeamRaiser Management
3:30	Event Management Center
4:30	Wrap-up and Evaluation

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Additional Resources

After this TeamRaiser Workshop…

Convio Customer Center

- http://customer.convio.com

Convio Community

- http://community.customer.convio.com
  - Convio Online Marketing Benchmark Study
  - Wired Wealthy Report

* Use same login information for both

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Phased Priorities

Internet Strategy - Phased Priorities Example

	Walk	Jog	Run
Outreach: Reach new constituents	▪ Promotion and optimization of email subscription and action ▪ Organization credibility components ▪ Tiered content access	▪ Reciprocal linking and banner ads ▪ Search engine optimization ▪ General viral campaign(s)	▪ Regional and/or program specific viral campaigns ▪ Affiliate programs and list chaperoning
Motivation: Build relationships	▪ Action base membership engagement ▪ eGreeting cards	▪ Members services FAQ & submission forms ▪ Profile & contact info collection - surveys	▪ Expanded "action membership" benefits
Action: Drive membership and loyalty	▪ Optimize donation promotion and flow ▪ Content & merchandise offerings ▪ Integrated acquisition, renewal and add gift appeals	▪ Designated online giving ▪ Event based micro campaigns ▪ Upgrade and migration campaigns	▪ Volunteer fundraising ▪ Sustained giving ▪ Major gifts and planned giving content and mentions
Loyalty:	▪ Loyal clients begin the cycle by reaching out to friends		

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Because TeamRaiser can be complex in its use, we will use the same phased priorities discussed during the Convio Essentials training. Start off slow in the Walk phase, and each year strive to optimize your events based on what you have learned and your desired goals. This workshop is designed to get you started in the Walk phase.

TeamRaiser Configuration

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Overview

TeamRaiser Configuration will walk you through the participant's experience to give you a better idea of the options available when creating the TeamRaiser from the administrator side. Identifying common configuration options and critical content areas will keep you focused amid the many options available. TeamRaiser events can be as simple or as complicated as you make them, but here, we will start with a foundation, upon which you can add functionality based on your event's needs.

Objectives

Objectives

In this section, you will:

- Identify the participant and donor experiences
- Identify common configuration options
- Create an event from scratch based on common configuration options
- Identify and edit critical content areas
  - Autoresponders
  - Suggested Messages
  - TeamRaiser Pages
- Customize the event URL, test and publish the event
- Copy an event and associate with previous year

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Overview

What is TeamRaiser?

- An event management/marketing/fundraising tool that empowers participants to raise money for your organization with convenient and effective tools

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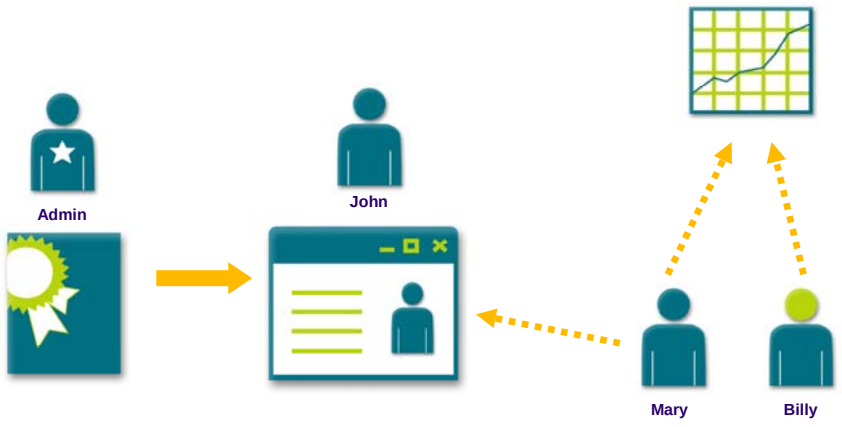
How It Works



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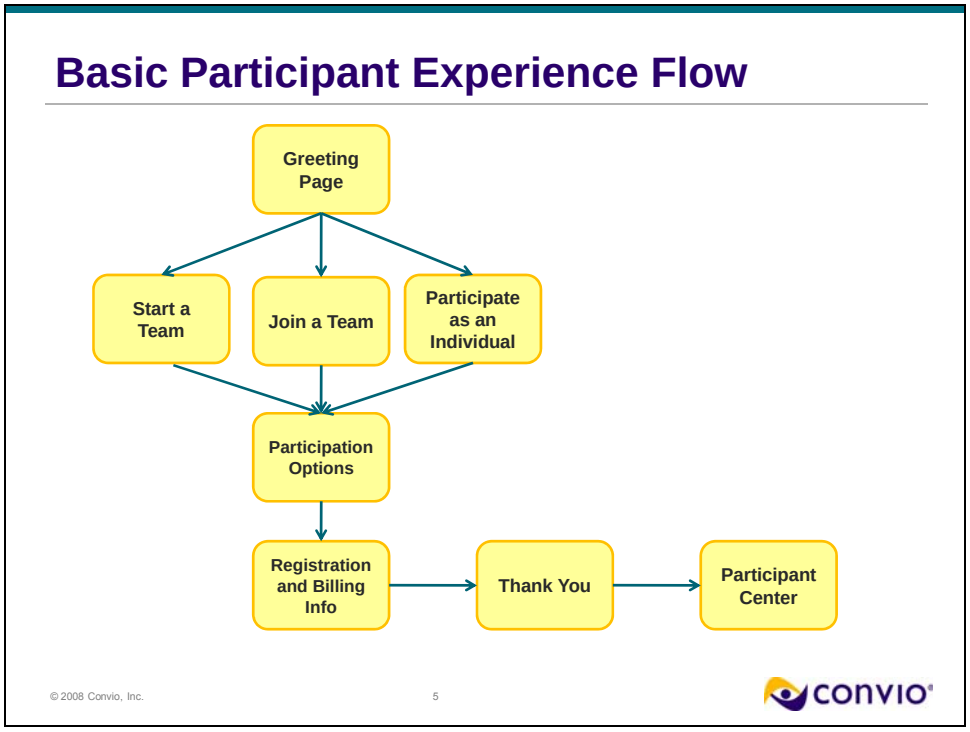
The Administrator creates and publishes the TeamRaiser event. John signs up to participate and, using the tools, creates his own web page and sends emails to his friends, family and co-workers asking for donations. John's friends, Mary and Billy, make donations to help him reach his goal. Mary and Billy become constituents and decide to participate in next year's event.



The participant begins on the Greeting Page, decides if they are starting or joining a team, or participating as an individual. They select their Participation Option, enter registration and billing information and end up on the Thank You page. From there they can access their tools in the Participant Center.

Constituent360 Review

C360 Review: The "Registered User"

- **Registered User** = anyone who has a contact record in your Constituent360 database

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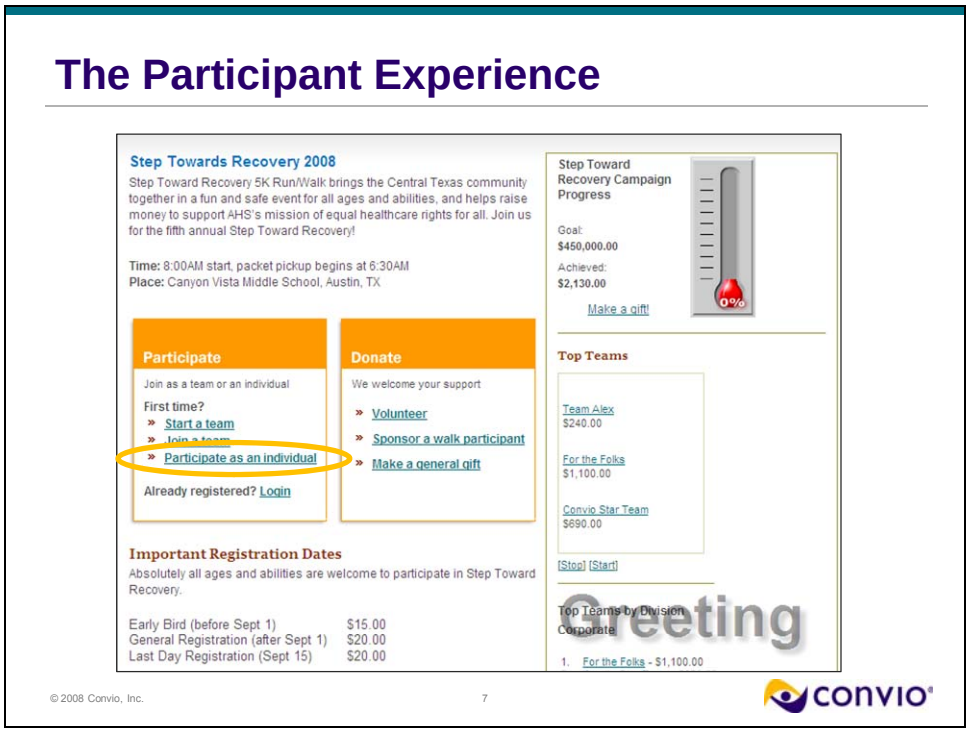
An important term to understand is the Registered User. You may think of event registration when you hear this term, but for the purposes of managing your Convio database, "registered user" simply means a contact record in your Constituent360 database. That contact record may indeed have been added to the database as part of event registration, but there are several other possible methods of registration as well.

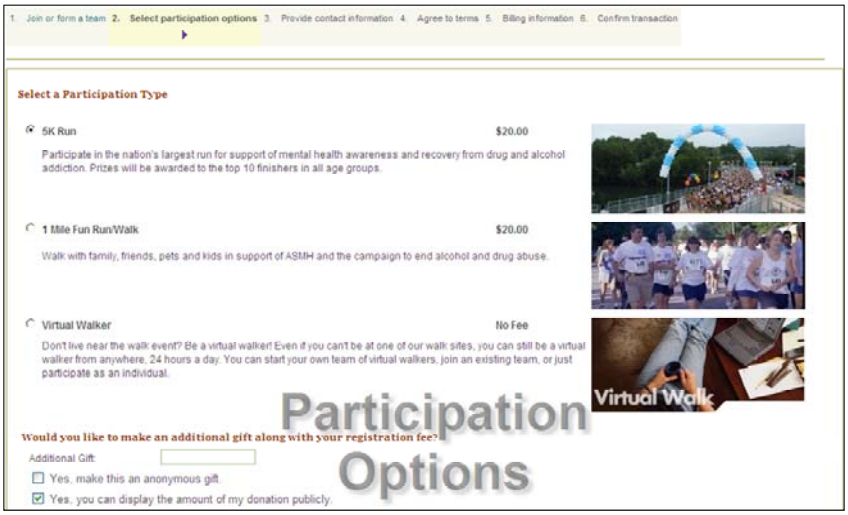
In addition to "registered user" you may also hear the terms "contact record," or "member of your house file," which mean the same thing.

The Participant Experience



The participant experience begins on the Greeting Page. This page should contain the name, location, and date of your event, as well as any other pertinent information, such as registration fees, discounts, restrictions, etc. However, the most prominent actions on this page should be “Donate” and “Participate.” This page can also display fundraising stats such as a donation thermometer, top team and fundraiser honor rolls, and recent donors to name a few.

Choosing a Participation Option



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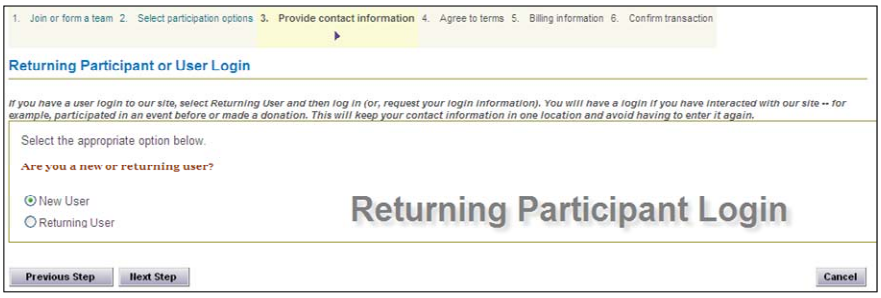
The Participation Options page contains the different Participation Types set up by the administrator. This page is not considered a critical content page since the content is generated from other parts of the configuration process.

Returning User or Not



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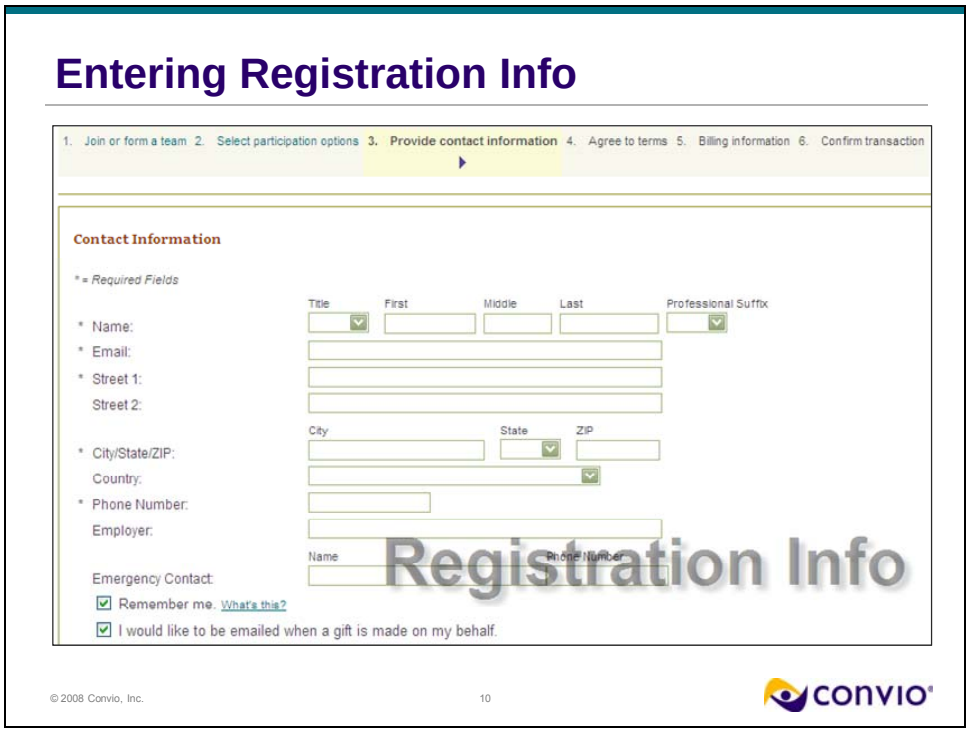
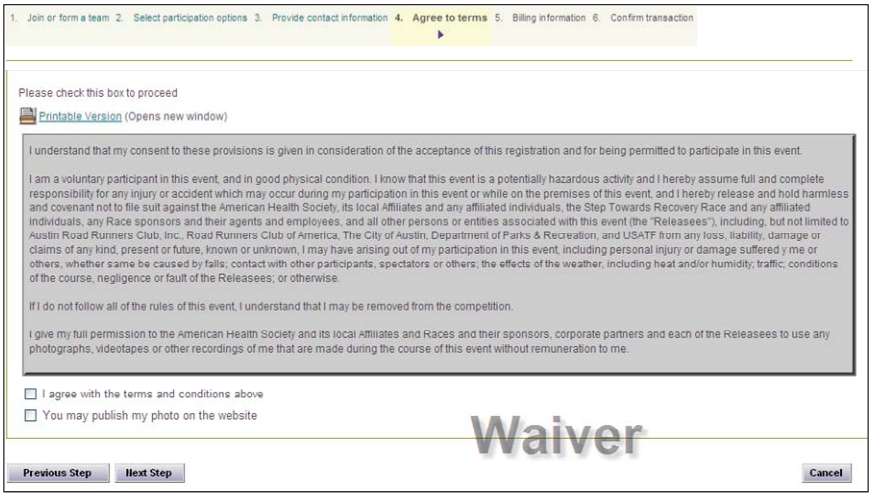
The Returning Participant page was designed to help reduce the number of duplicates in your system by asking returning users to first login before completing their registration. Once logged in, the registration fields will be pre-populated with the current contact information for this participant.



The Registration Information page can be customized for each participation type. The name and email fields are locked and cannot be changed, but additional fields can be requested or required as determined.

Agreeing to the Waiver



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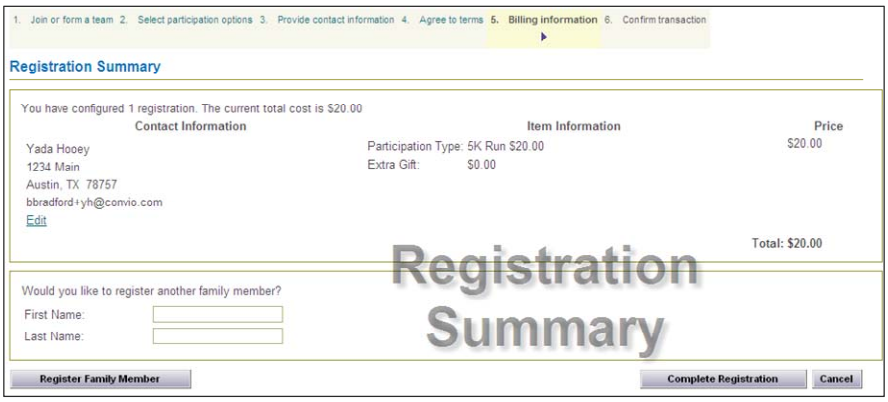
The Waiver page is also not considered a critical content page since the waiver text is created when setting up participation types. You can determine whether or not a waiver will be required for a participation type.

Reviewing the Registration



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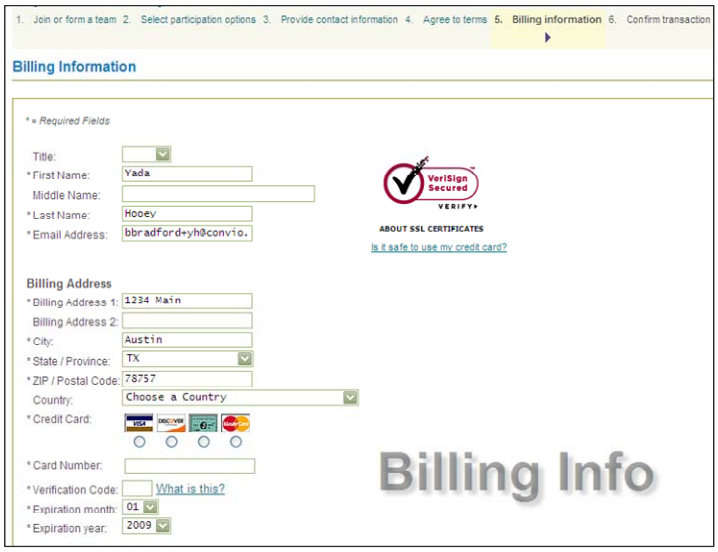
If you have selected to allow the participant to register other participants, the option will show to the participant on the Registration Summary page. Doing so will take the participant to the Secondary Registration page.

Entering Billing Info



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Confirming Registration

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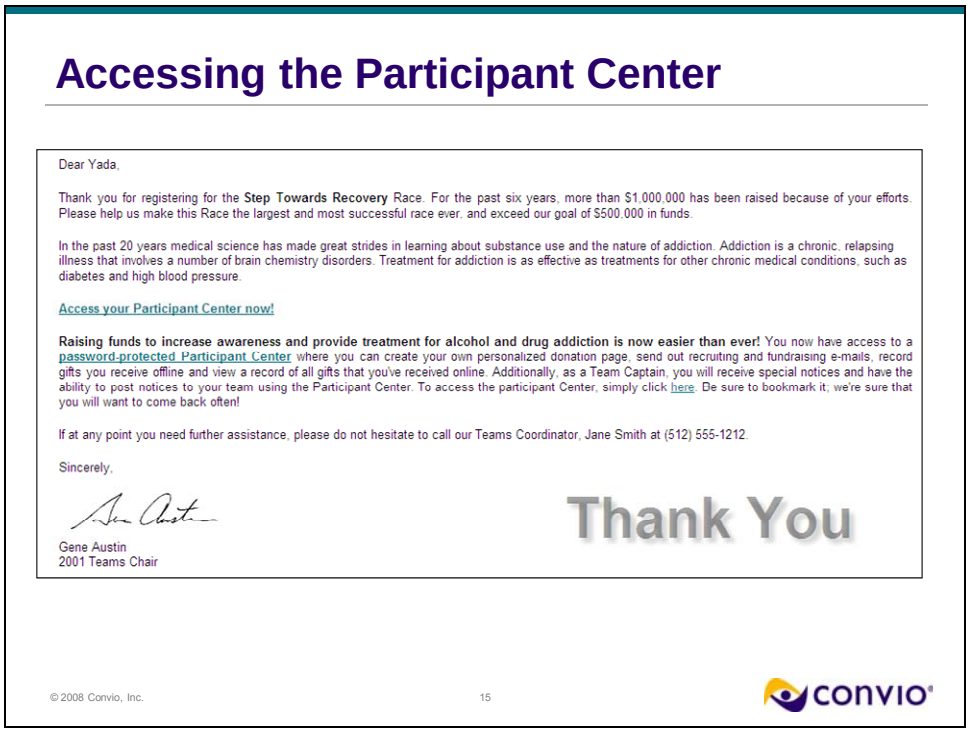
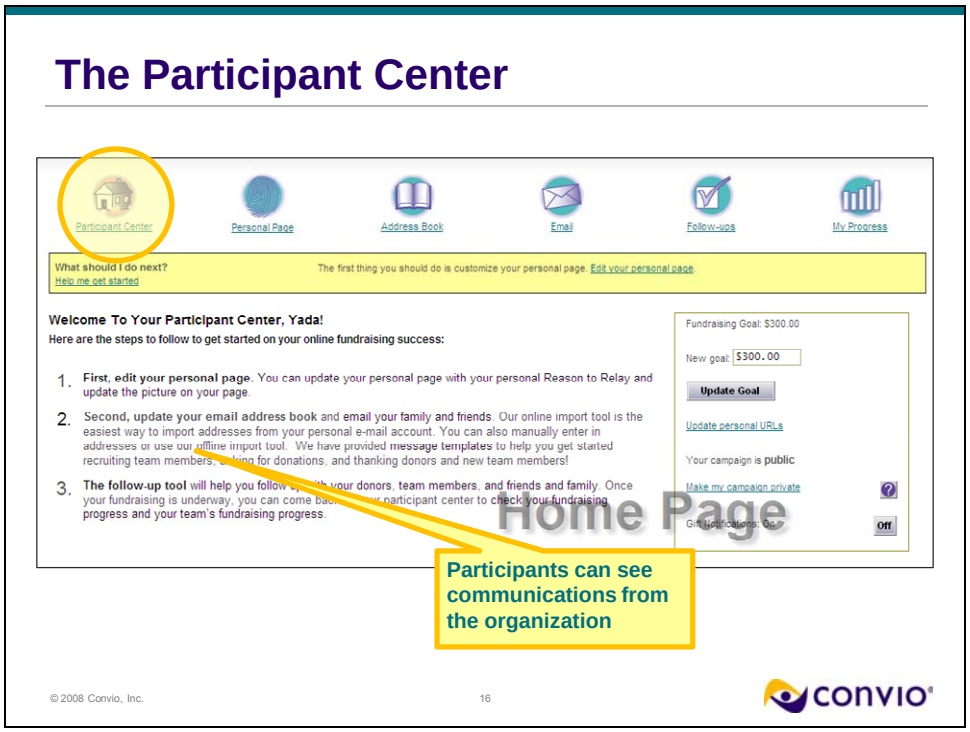
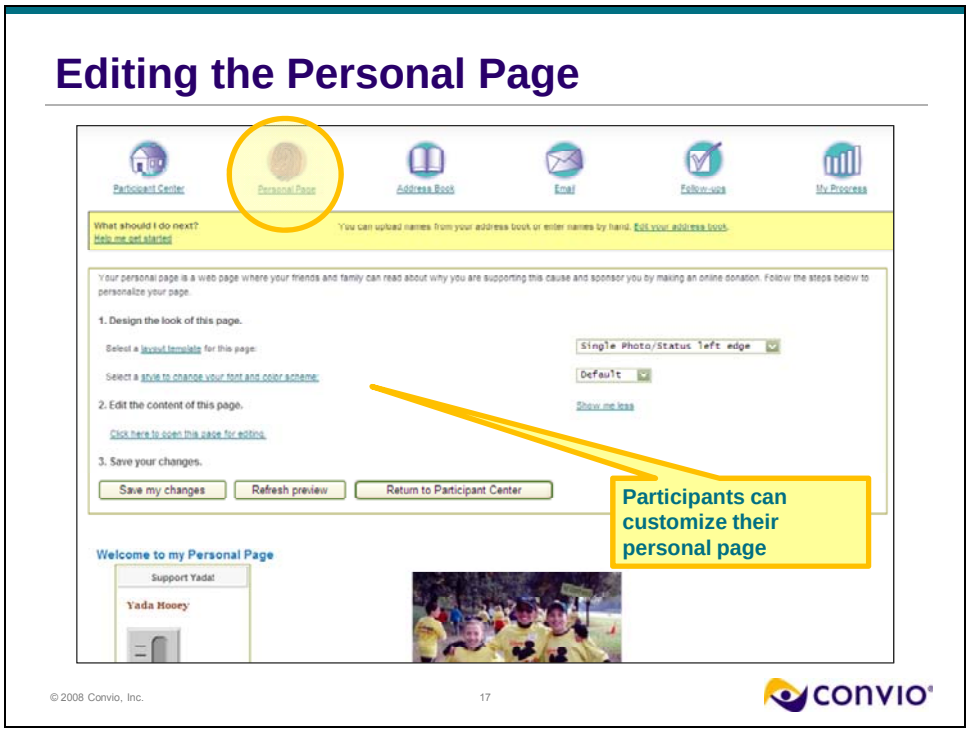


The participants lands on the Thank You Page, completing the registration process. It is here we will thank them for registering, and carefully guide them through the process of using the Participant Center tools. A well-placed and prominent link to the Participant Center should be included on the Thank You Page.

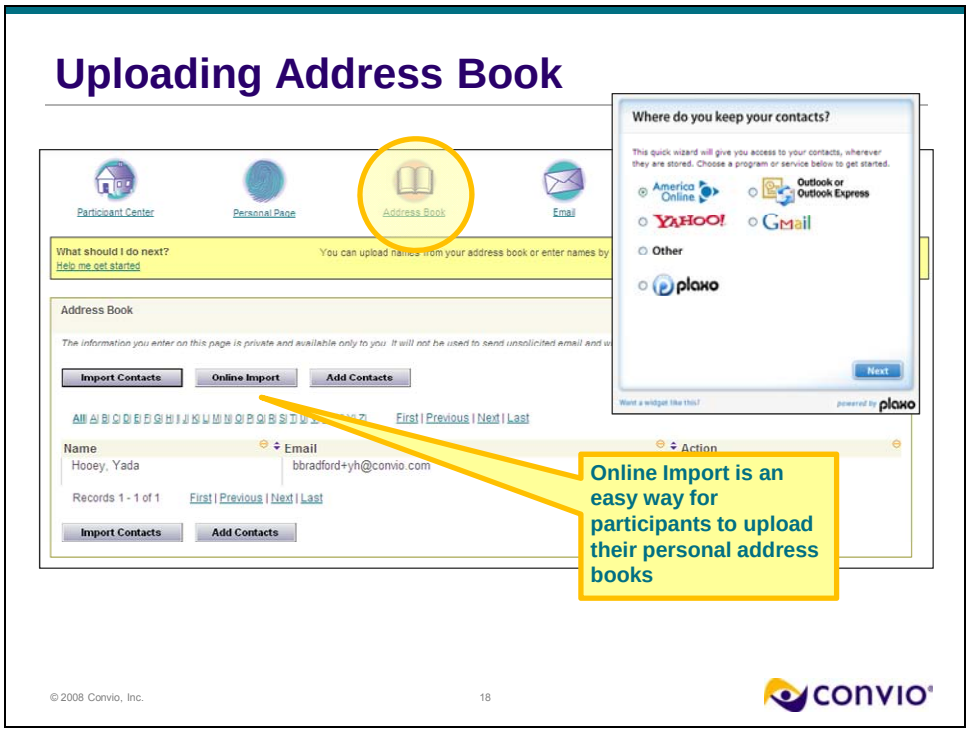
The Participant Center



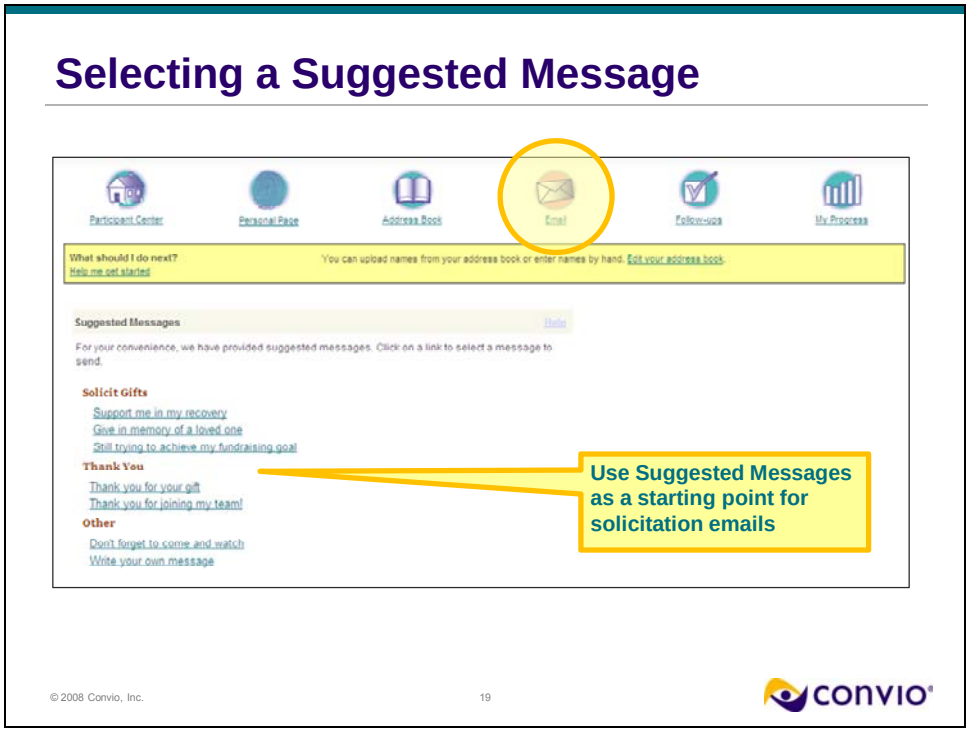
The Participant Center contains the tools that participants will use to fundraise for the event. This page is called **Home Page** in the list of TeamRaiser pages and can be used to communicate important information to participants and should not be overlooked. A best practice is to explain and guide participants through setting up and using the Participant Center. Use conditionals to create a dynamic experience.



The participant can create their own web page, or Personal Page, on your event site. You, as the admin, can determine how customizable the page will be, but allowing participants the most flexibility to express themselves is a good idea. The participant can upload picture(s) and tell their story, which will be seen by potential donors. Enabling the blogging feature gives participants another outlet to express themselves.

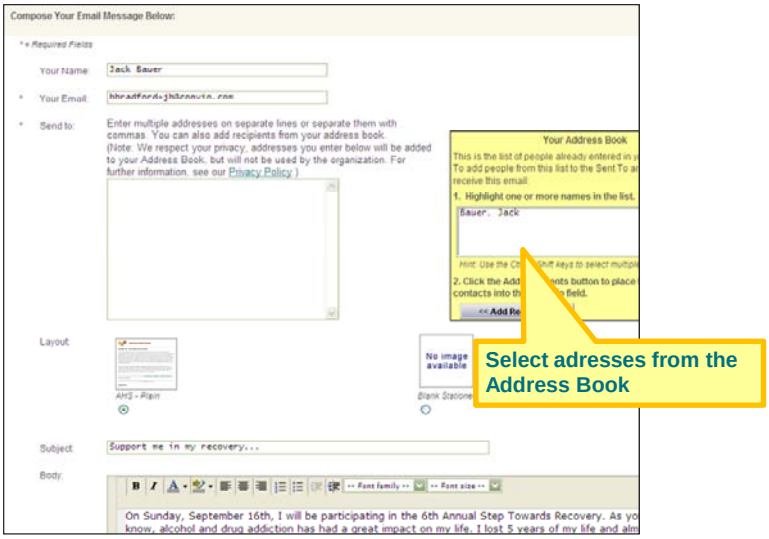


The Address Book allows participants to easily upload their personal address books. **The information participants upload on this page is private and available only to the participant. It will not be used to send unsolicited email and will not be sold to a 3rd party.**



You should provide Suggested Messages that will give novice fundraisers ideas for sending solicitation emails to friends, family and co-workers.

Sending Emails



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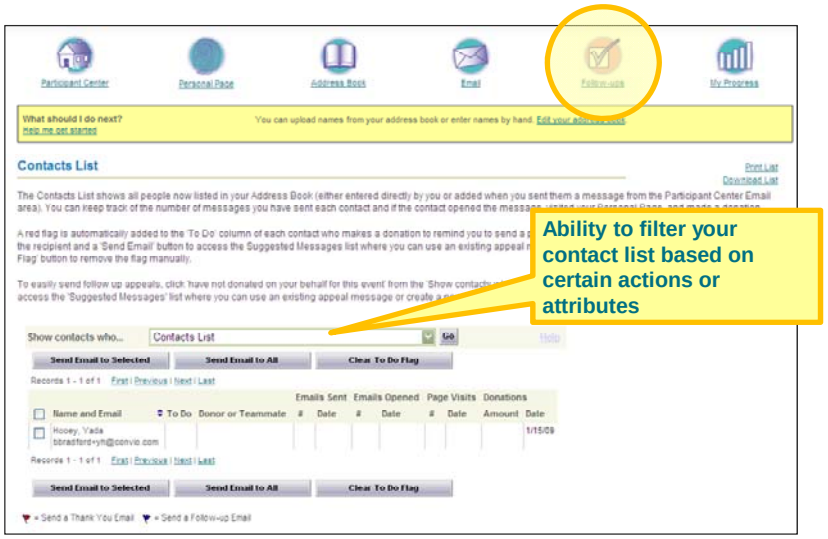
After selecting a Suggested Message, participants can choose contacts from their address book to send a message. You can determine stationery, and to what degree the Subject and Body are editable. Optionally, allow participants to create and send HTML or plain text emails.

Following-Up



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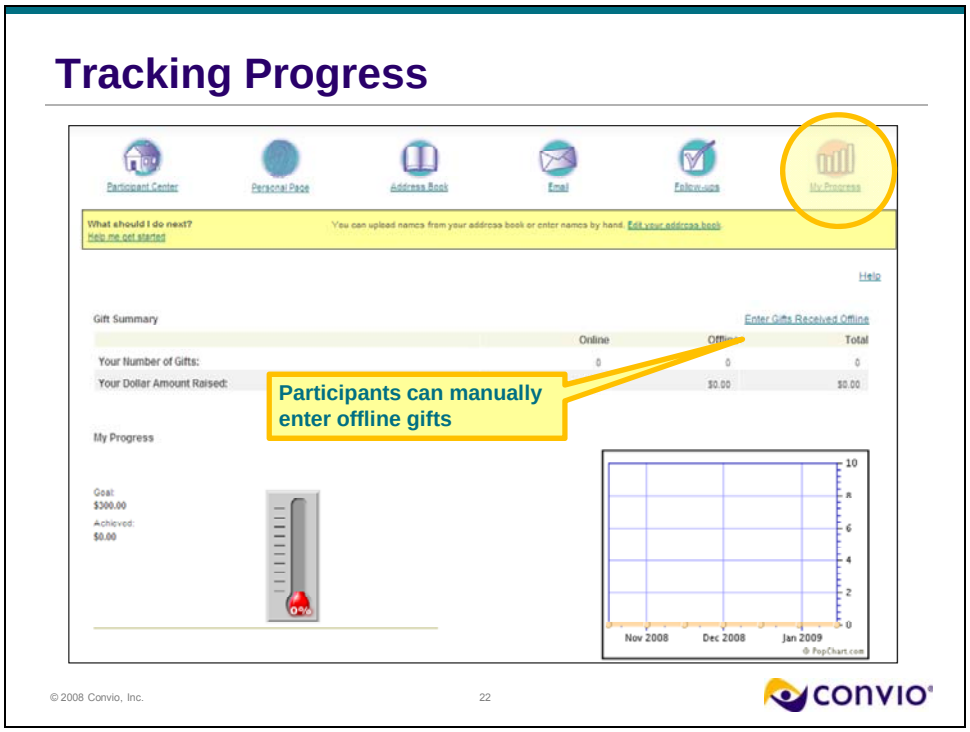
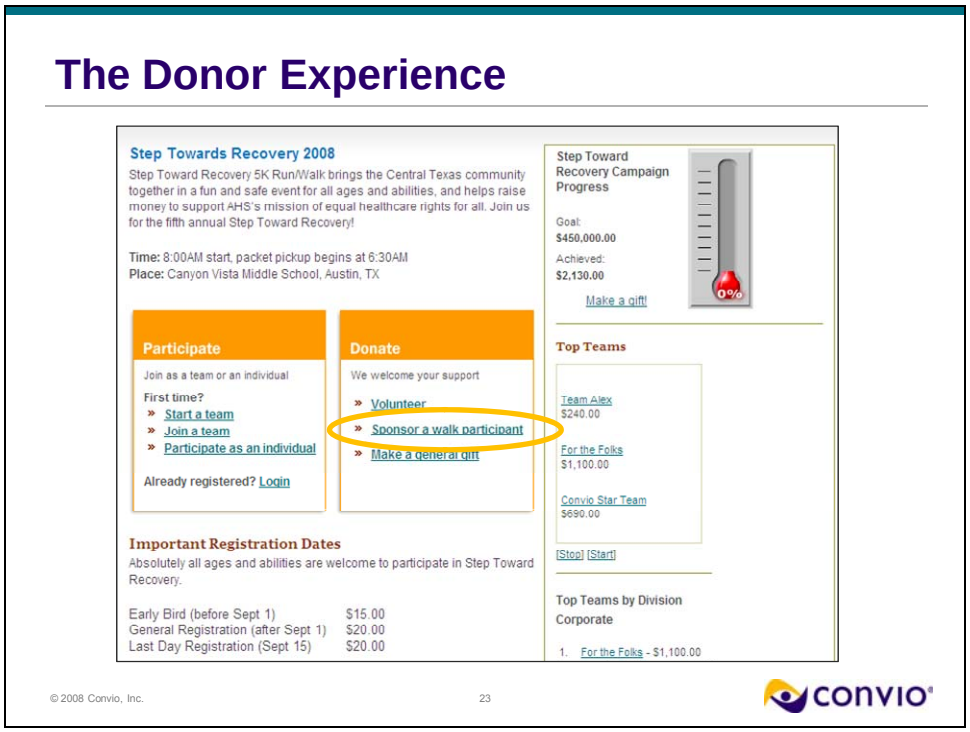
The Follow-ups page allows participants to see which of their emails sent have yielded a donation. Flags appear next to contacts based on donation history, and the contact list itself can be filtered based on certain actions or attributes.

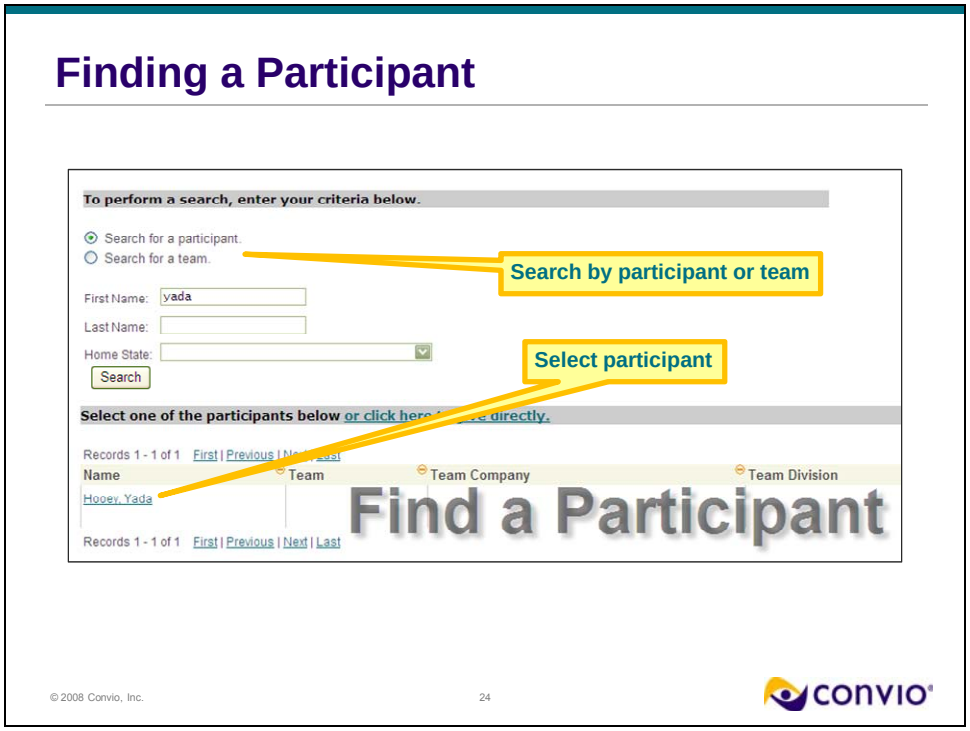


Finally, the My Progress page gives participants a view of all their donations, a donation progress chart, and a thermometer showing the participant's goal vs. achieved. It is a good idea to enable the **Enter Gifts Received Offline** feature, as doing so provides participants with an instant gratification of seeing their progress meter rise.

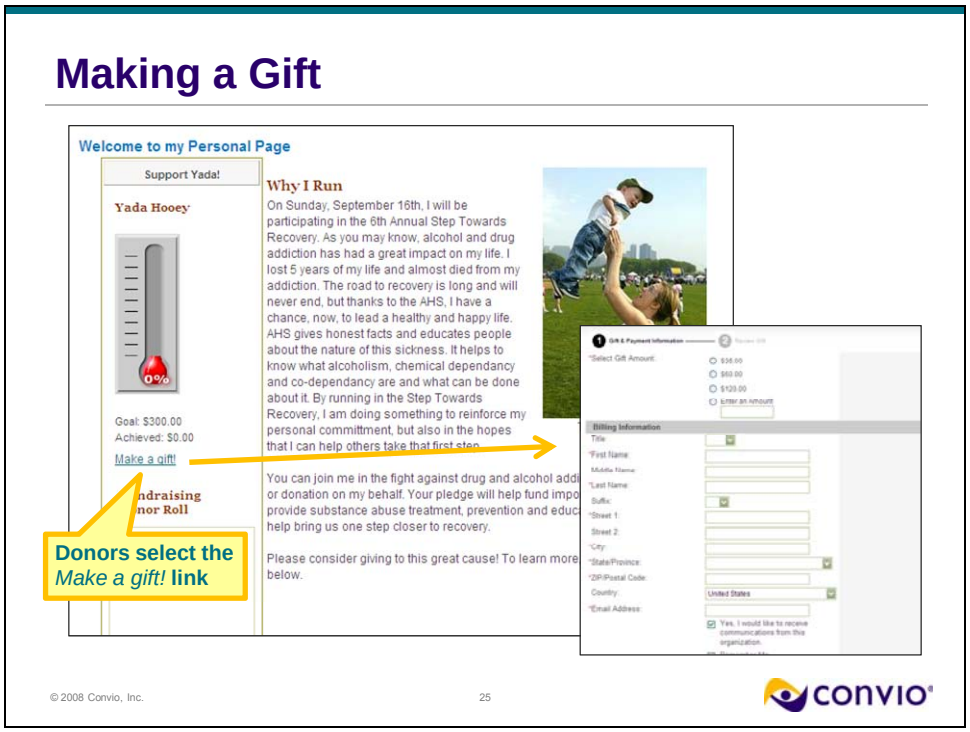
The Donor Experience



Make sure you have provided donors with a clear path to finding and donating to a participant.



Donors may search for a participant or team by using the provided search fields. Clicking on the name will take the donor to the Personal Page of the participant or Team Page of the team, depending on the search.



Once on the Personal Page, the donor will click the ***Make a gift!*** link which will take them to the donation form set up for this event.

EXERCISE 1.1: The Participant and Donor Experiences

Register as an Individual

1. From the AHS home page, click the ***Find out how you can get involved*** link at the bottom of the page
2. Find and click the ***Participate as an Individual*** link
3. Select a **Participation Type**, add an additional gift, and set a different fundraising goal
4. Click ***Next Step***
5. Fill out all required (*) fields with your information and record your username and password in the provided fields below
6. Click ***Next Step***
7. Accept the **Waiver** then click ***Next Step***
8. Click ***Complete Registration***
9. For payment, choose **Visa**, and enter [**4111 1111 1111 1111**] for the credit card number
10. Enter [**111**] for the **Verification Code** and leave the **Expiration** as is
11. Click ***Next Step***
12. Click ***Process***
13. Click ***Access your Participant Center Now!***

User Name: _____

Password: _____

Donate to a Participant

1. Make sure you are logged out by clicking the ***Log Out*** link in the left navigation
2. From the AHS home page, click the ***Find out how you can get involved*** link at the bottom of the page
3. Click the ***Sponsor a walk participant*** link
4. Input a fellow classmates name in a search field and click the ***Search*** button
5. Select their from the list
6. Click the ***Make a gift!*** Link beneath the thermometer
7. Select an amount and fill in the required fields using a different name and email, including using the credit card number from steps 9 & 10 above
8. Click ***Next*** then click ***Process***

Donor Name: _____

Donor Email: _____

View the Gift in the Participant Center

1. Make sure you are logged out by clicking the ***Log Out*** link in the left navigation
2. Click the ***Log In*** link in the left navigation, login using the information from the first exercise, then click the ***Participant Center*** link near the bottom of the page
3. Click on the ***My Progress*** icon and note the donation
4. Click on the ***Follow-ups*** icon and note the donation

EXERCISE 1.2: Fill Out Common Configuration Options Questionnaire

CONFIGURATION OPTION	PROCESS NAVIGATOR
1. EVENT NAME AND DATE _____	**1**
2. PREVIOUS EVENT ASSOCIATION Is this your second plus year for this Convio TeamRaiser event? If yes, then link to previous year's event. Yes / No	**1**
3. FUNDRAISING GOAL (THERMOMETER GOAL) What is your event fundraising goal? _____	**2**
4. ADDITIONAL QUESTIONS (EVENT AND/OR PARTICIPATION TYPE) Is there additional information you'd like to capture from your participants? (t-shirt size, etc.) _____ _____ _____	**3 (Related Actions) / 6**
5. SHOW PARTICIPANTS UNCONFIRMED GIFTS Do you want unconfirmed gifts to show in the Gift History list in the Particpant Center? **Yes** / No	**3**
6. PARTICIPANT FUNDRAISING GOAL Do you want to allow participants to enter a fundraising goal? **Yes** / No	**3**

7. SUGGESTED PARTICIPANT FUNDRAISING GOAL **3**

What suggested goal will you present to registering participants?

_____

8. PARTICIPANT PERSONAL PAGE

a.	Do you want participants to be able to customize their Personal Page?	**Yes** / No	**3**
b.	Do you want participants to have the ability to change the page layout?	**Yes** / No	**3b**
c.	Do you want participants to be able to change the color of the page layout?	**Yes** / No	**3b**
d.	Do you want participants to be able to change status indicators?	Yes / No	**3b**
e.	Do you want participants to be able to use HTML to format their Personal Page?	Yes / No	**3c**

9. OFFLINE DONATIONS **3a**

Will you allow offline donations (such as personal checks) to be entered by participants? This allows a user to type in and acknowledge offline checks on their personal page. High-performing participants really like this option.

Yes / No

10. PARTICIPANTS ENTER CREDIT CARD DONATION IN PARTICIPANT CENTER **3a**

Would you like participants to be able to charge credit cards for others within their participant center?

Yes / No

11. REGISTRATION FEES COUNT TOWARD GOAL **3a**

For the minimum amount fundraised for participants, does their registration amount if applicable count towards their goal?

Yes / **No**

12. OBJECTIONABLE CONTENT EMAIL **3b**

Please enter an email address for receiving notifications if the content of participant's personal pages are considered objectionable by site visitors:

_____

13. BLOGGING **3b**
Would you like to enable blogs on participant's personal pages?

Yes / No

14. TEAM FORMATION **4**

Do you want participants to be able to form teams?

Yes / No

15. TEAM DIVISIONS **4**
Do you have team categories/divisions defined? If so, please list them all below.

_____

_____

_____

16. COMPANY TEAMS **4**
Do you want Team Captains to be able to associate the team they are forming with a company?

Yes / No

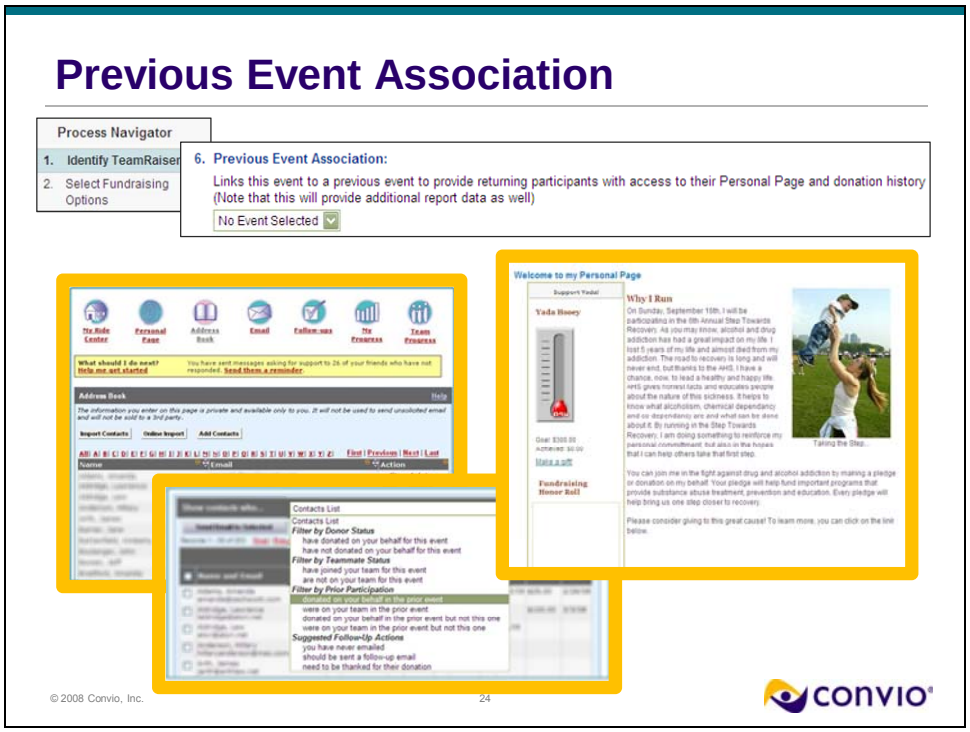
17. PARTICIPATION TYPES AND FEES **6**
Please list your different participation types and fees:

_____

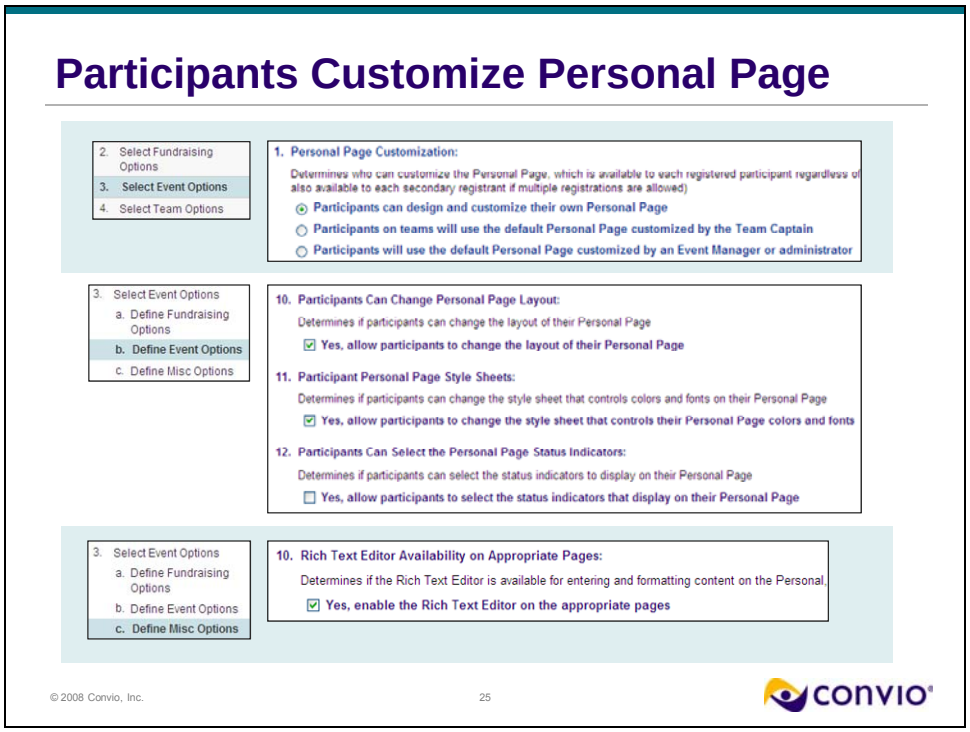
_____

_____

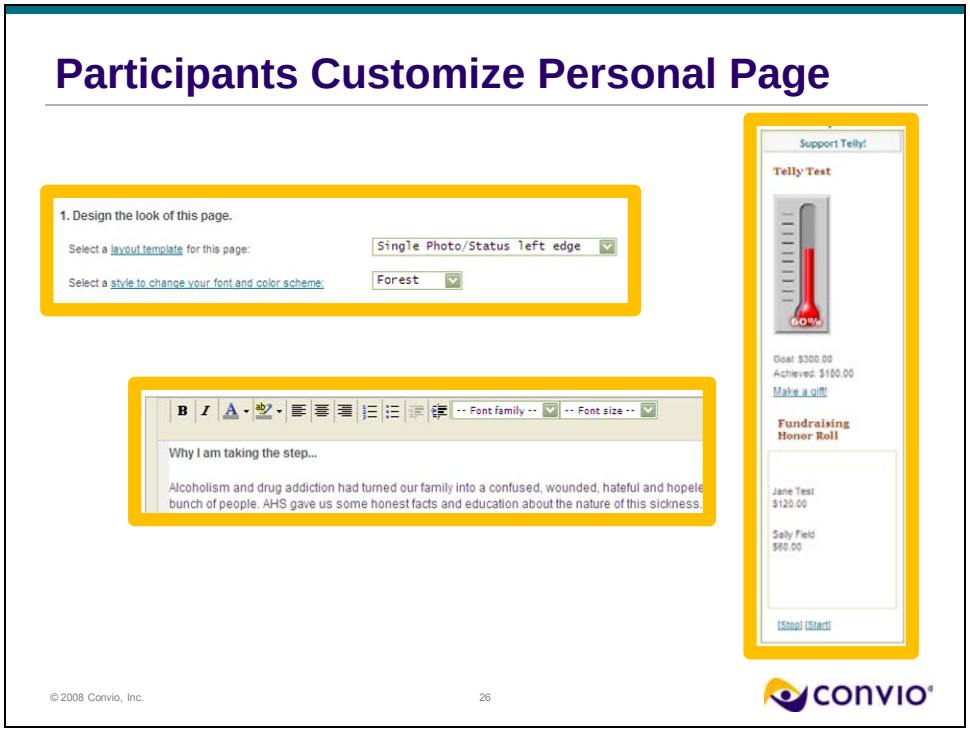
Identifying Common Configuration Options

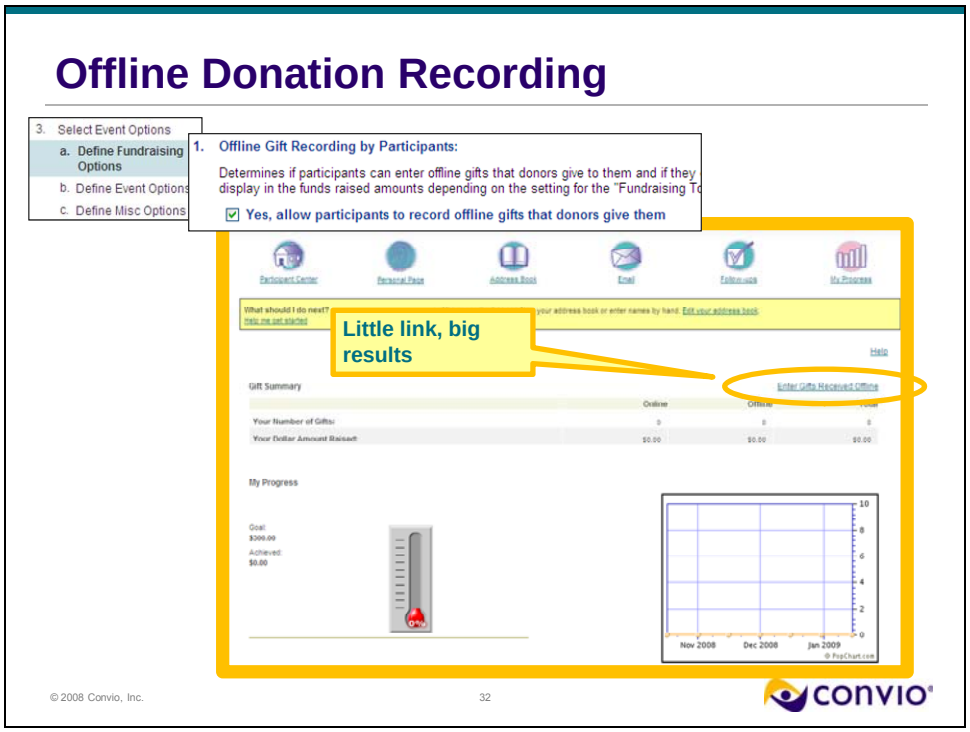


By linking your current event to the previous year's event, you allow the participant access to their address book, donor history, and personal page from the previous year. (**Note**: Screenshots with large border indicates what the participant will see.)

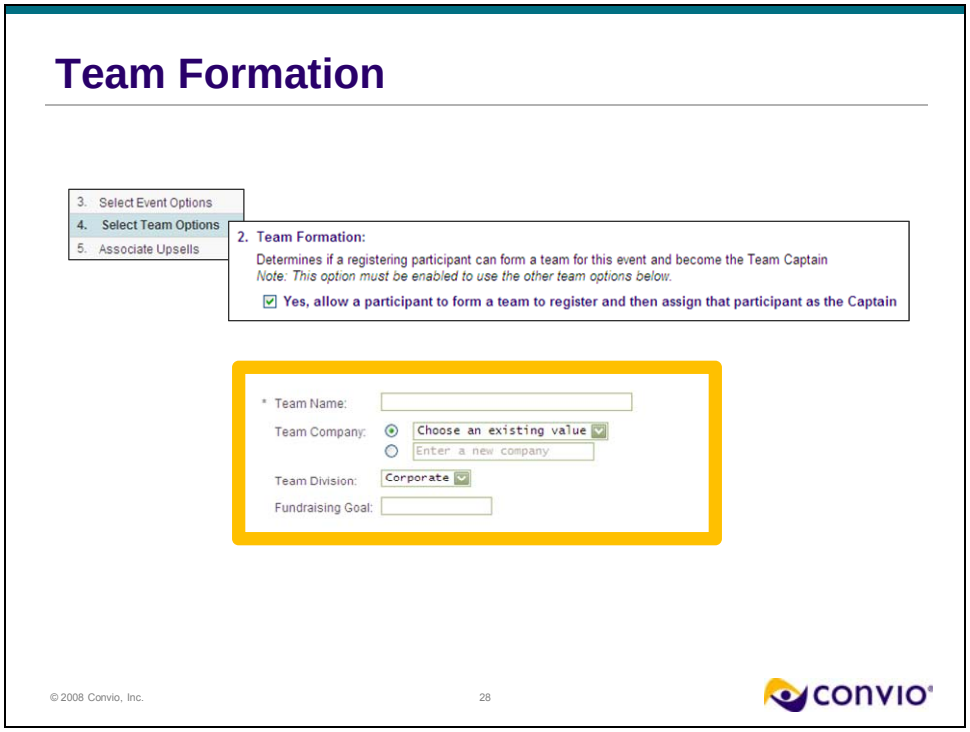


Allowing participants the ability to “customize” their personal page, which includes changing the color scheme, changing the position and number of photos, changing status indicators, and HTML formatting, gives participants a feeling of ownership and allows them to be creative on their personal page.



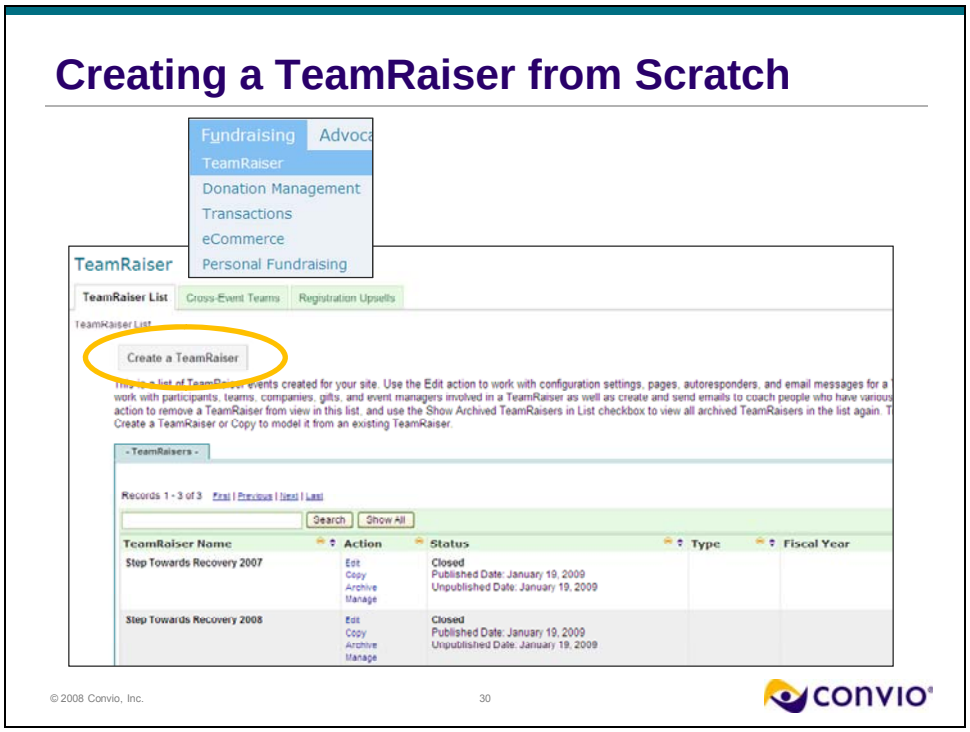


It is a good idea to enable the **Enter Gifts Received Offline** feature, as doing so provides participants with an instant gratification of seeing their progress meter rise. This link helps to fuel a healthy competition among fundraisers.

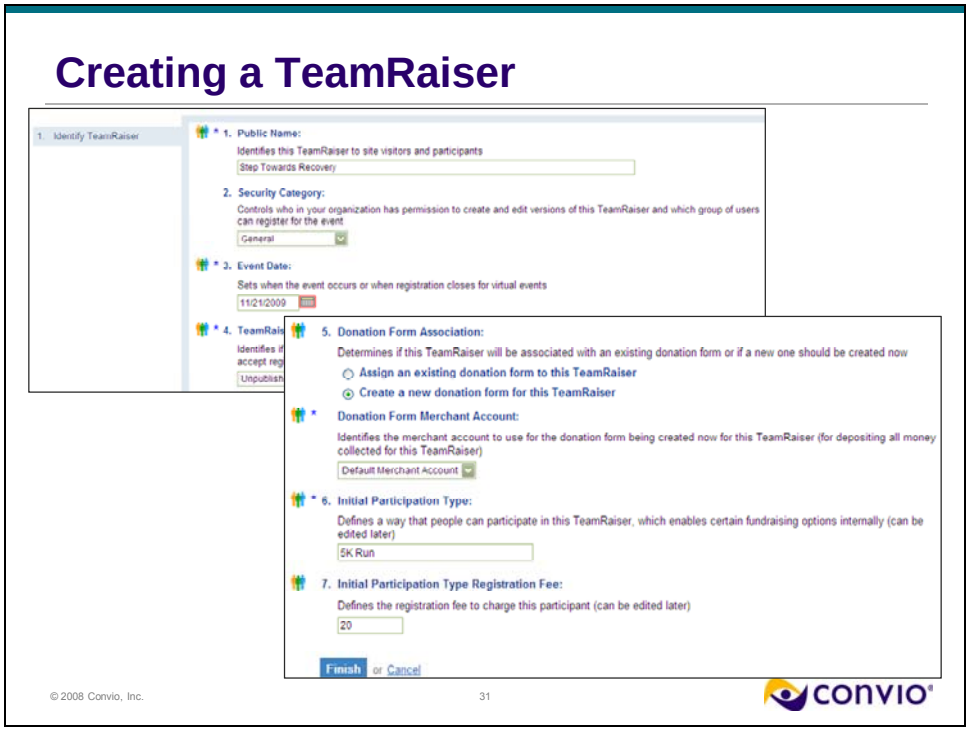


Allowing participants to form teams increases participation. This is called *Team*Raiser, right?

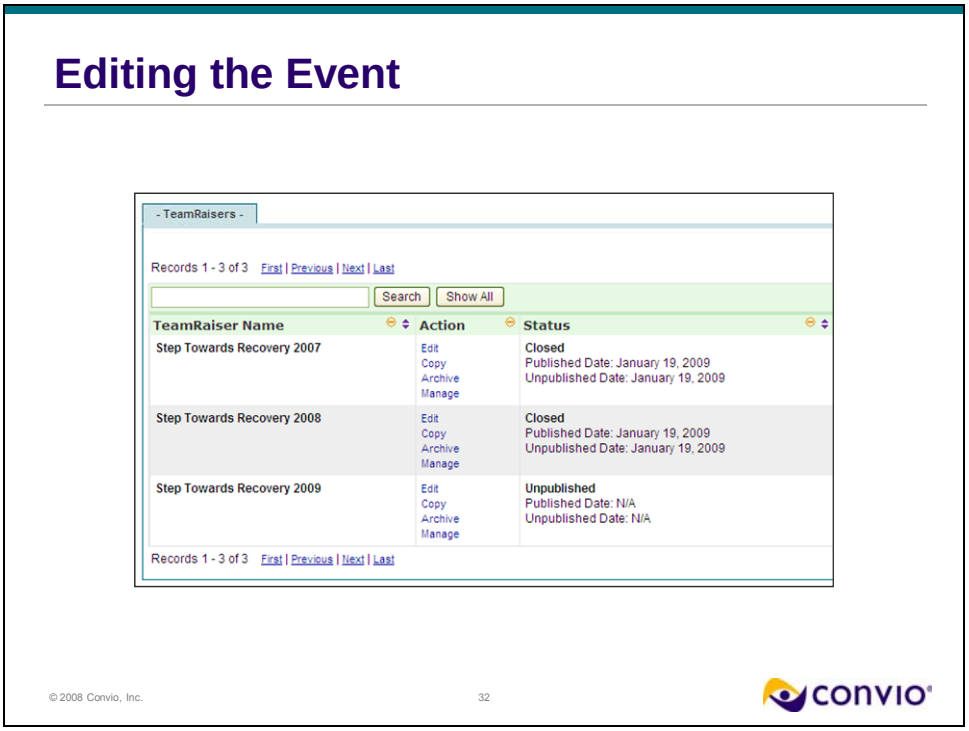
Creating a TeamRaiser From Scratch



TeamRaiser can be found under the ***Fundraising*** drop-down menu. To begin creating a TeamRaiser event from scratch, select the ***Create a TeamRaiser*** button.

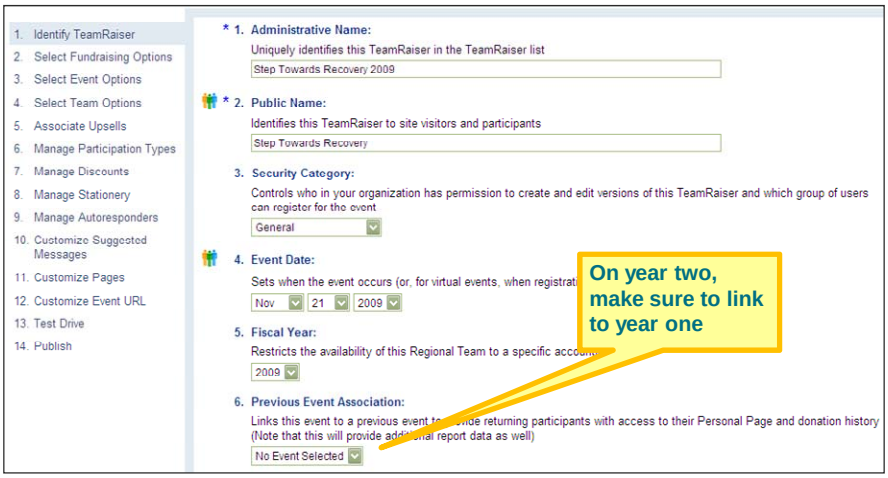


The first step in creating a TeamRaiser event is to identify the **Public Name**, **Event Date**, and **Initial Participation Type** to name a few. Leave the TeamRaiser in the ***Unpublished*** status until you are ready to display it to the public. You may also select an existing donation form, or ask the system to create one for you. Doing so will create a Donation Campaign and a Donation Form within it with the name of your event. You may edit the created form by going into the ***Donation Management*** module later on. Once you have identified your TeamRaiser, click ***Finish***.



Once you have completed the **Identify** step, you will be taken back to the TeamRaiser list page. To begin configuring your event, click ***Edit*** next to the event.

Identifying TeamRaiser



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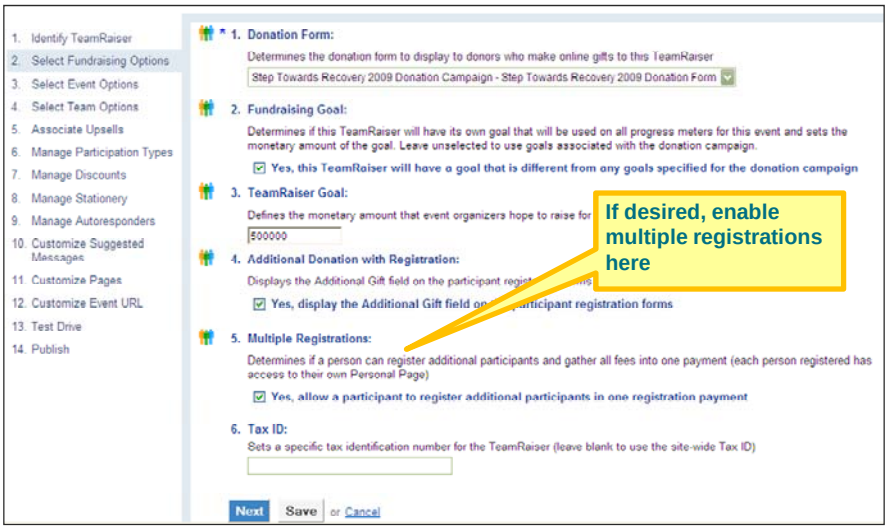
For the most part, this step simply confirms selections from the initial step, and allows you a few more options. If this is your second or more year with Convio TeamRaiser, be sure to link to the previous year.

Selecting Fundraising Options



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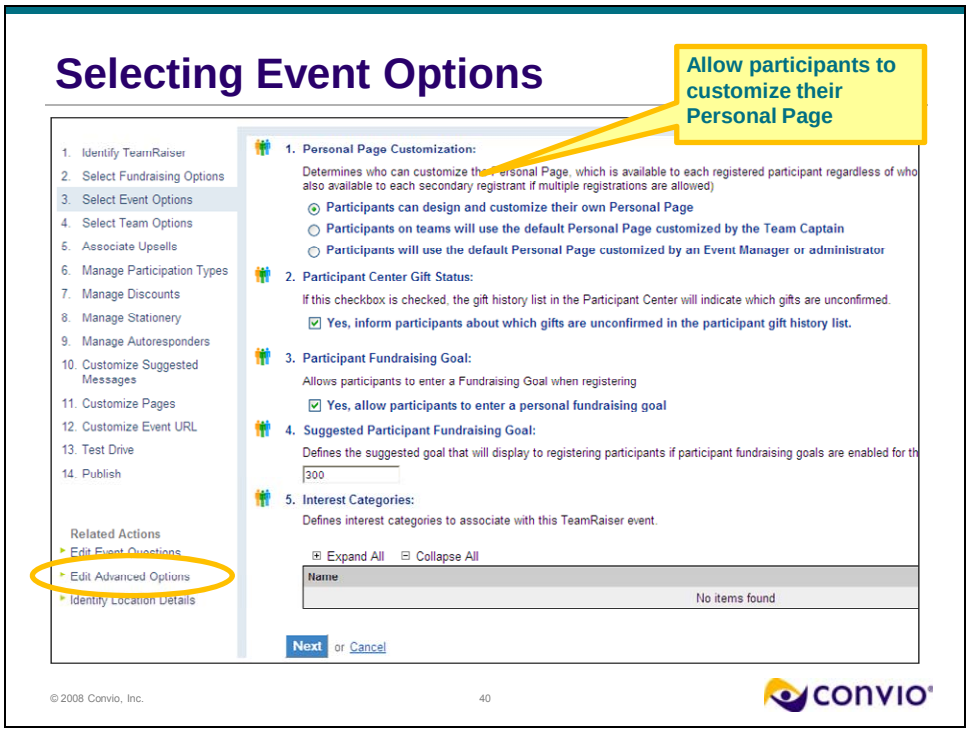
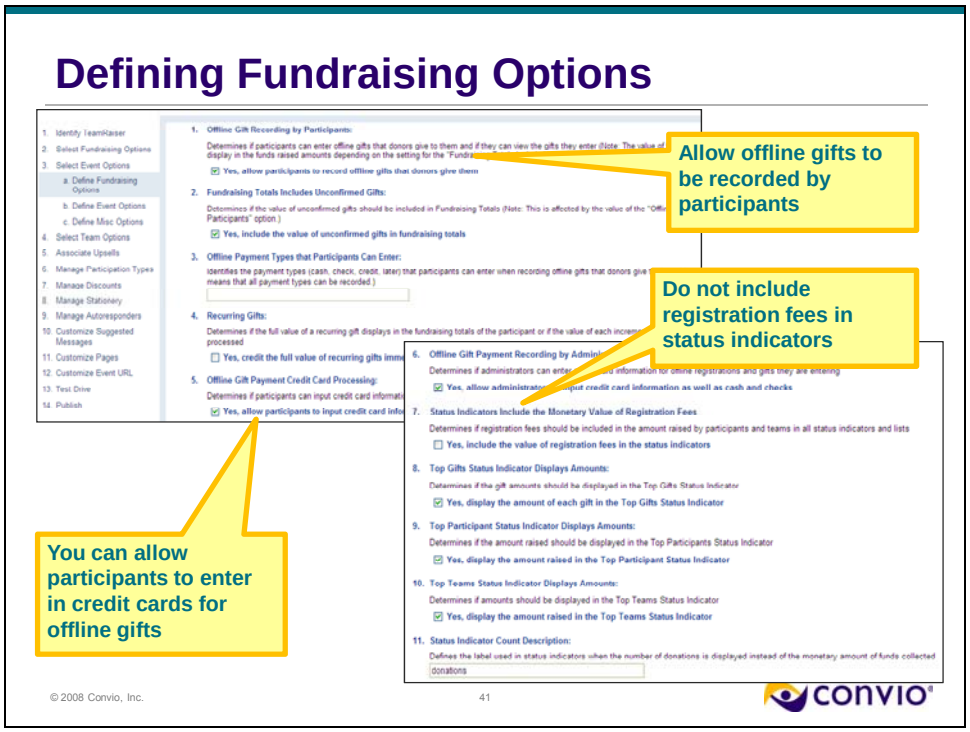
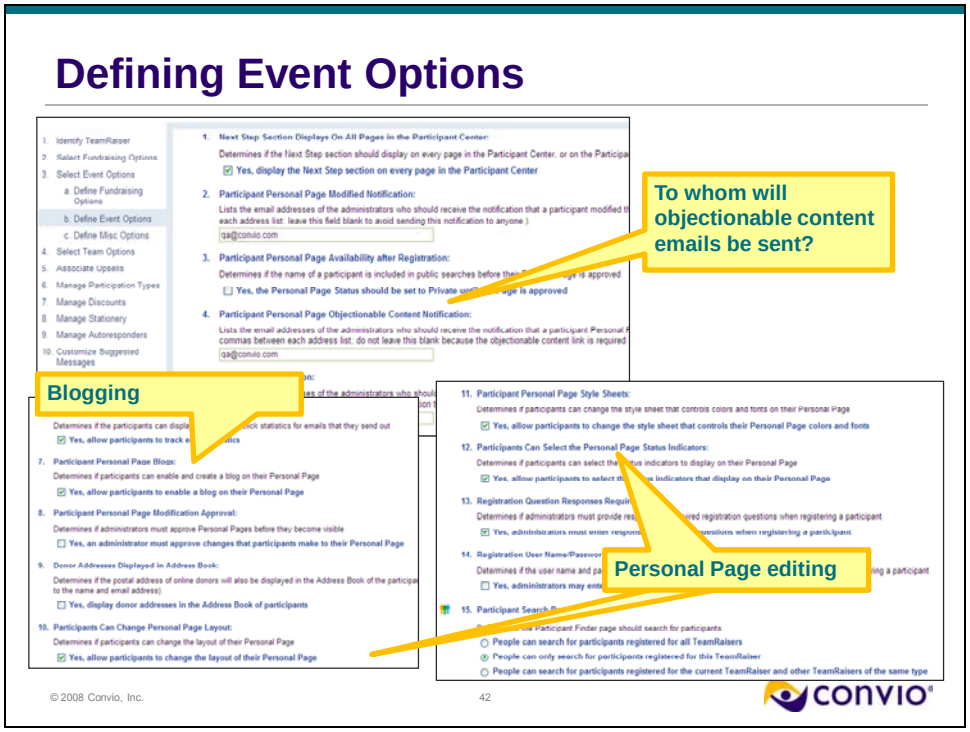
The TeamRaiser goal will display on the thermometer on the Greeting Page. Also, it is up to you whether or not to allow participants to register additional people at the time of their registration.



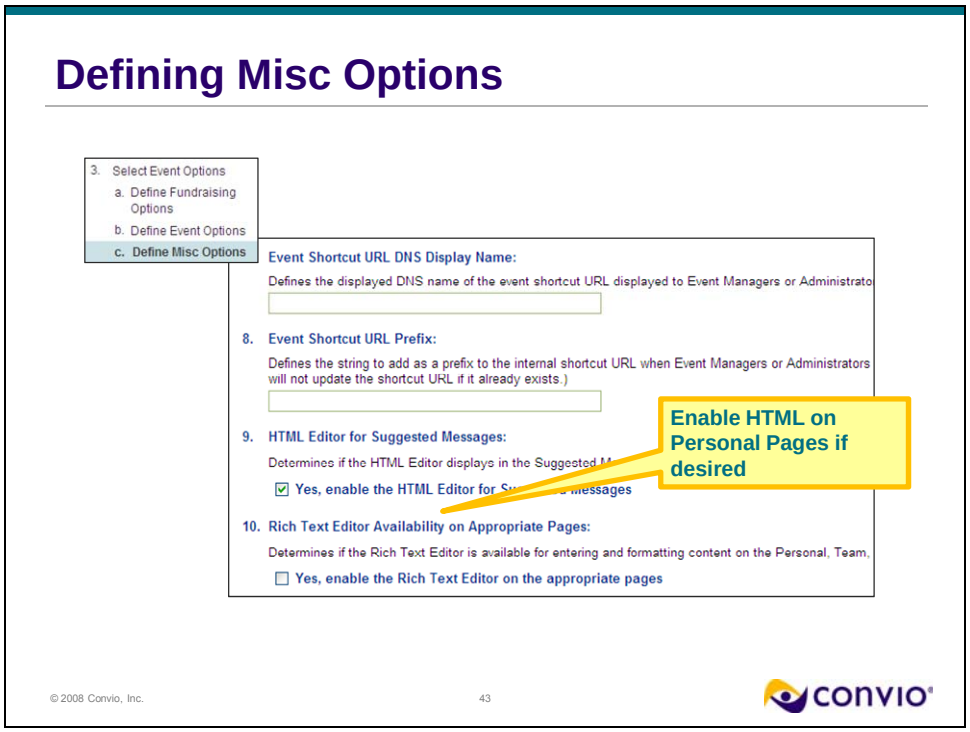
Click the ***Edit Advanced Options*** link in the **Related Actions** column to configure additional event options.



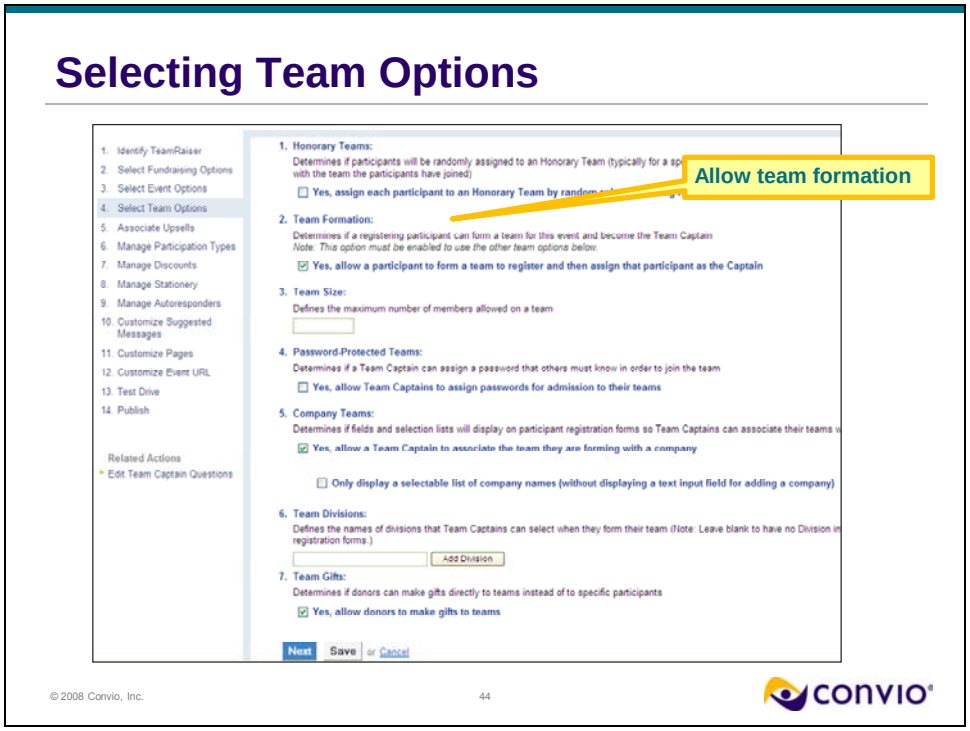
It is a good idea to allow participants to enter offline gifts in their Participant Centers. Also, it is a good idea to not include registration fees in your online fundraising totals. This can have an effect on reporting as the registration fee will show up as a donation in the thermometer, but will be separated out in actual reports.



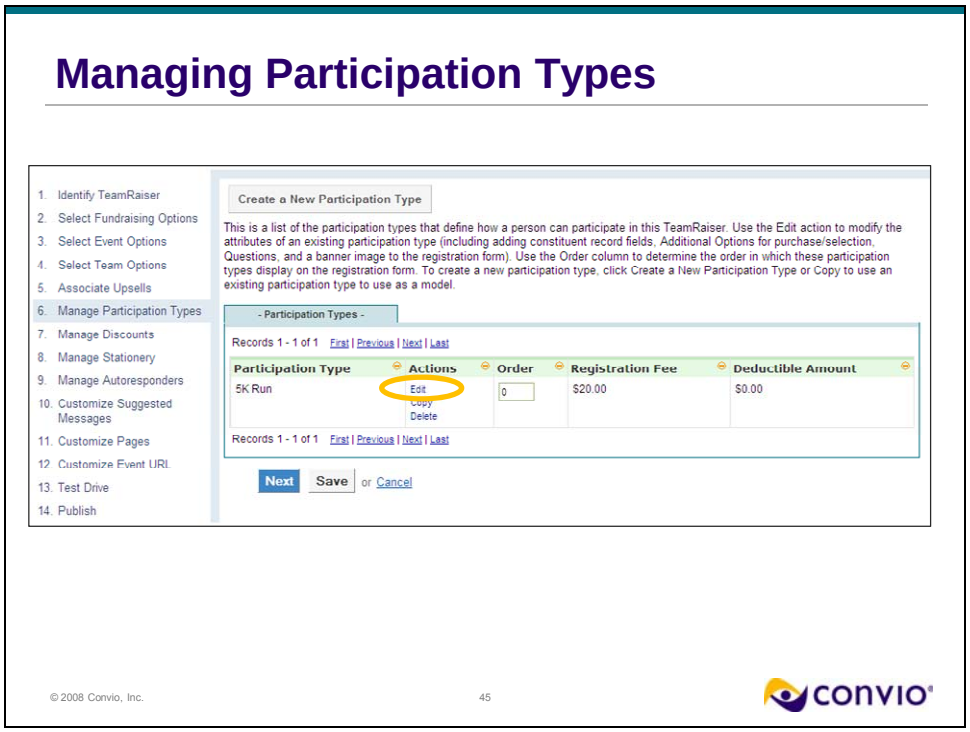
On the **Defining Event Options** step is where you can determine who will get notified if someone clicks the ***Objectionable Content*** link on a participants Personal Page, enable blogging, and allow the participant to customize their Personal Page.



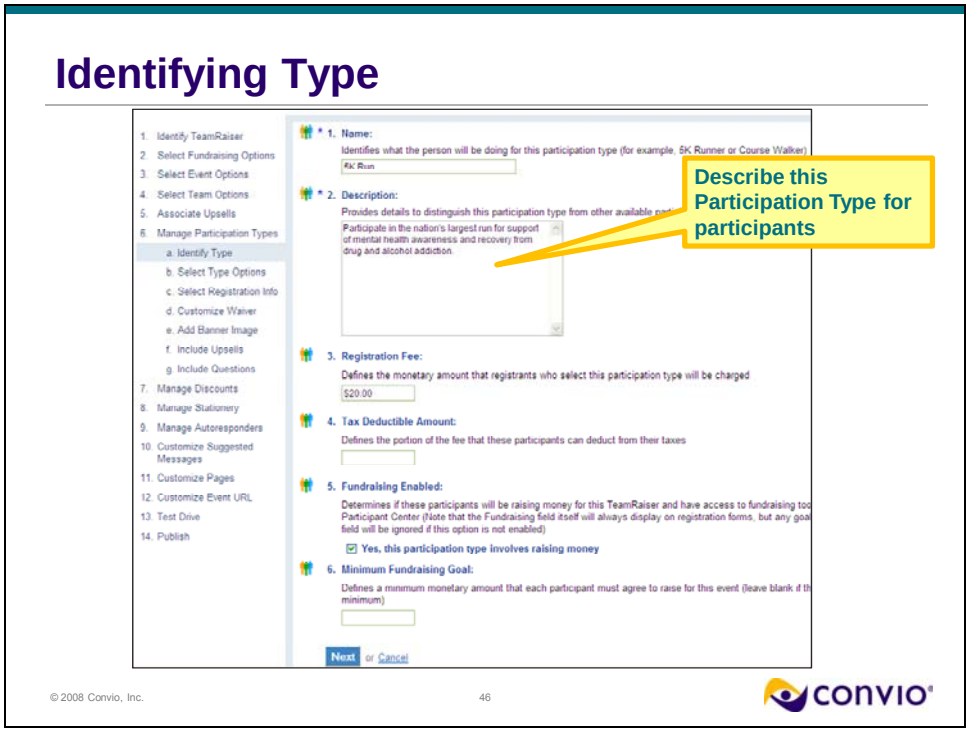
On the **Defining Miscellaneous Options** step is where you can allow HTML rich formatting on Personal Pages. You may also allow the HTML editor for Suggested Messages if desired.



The **Selecting Team Options** step allows you to determine if participants can form teams for your event. You may also allow participants to associate a company with their team as well as create divisions that can be useful for event prizes.

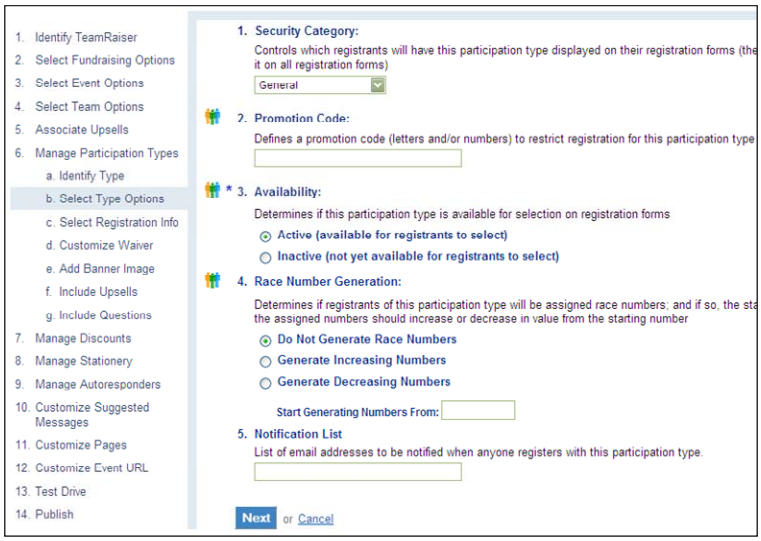


Participation Types determine how participants will participate. The initial Participation Type was created on the initial **Identify TeamRaiser** step and should be edited before publishing. Click ***Edit*** next to the **5K** Participation Type. To create a new Participation Type, click the button near the top of the page.



The first step is to select options for this type including creating a description.

Selecting Type Options



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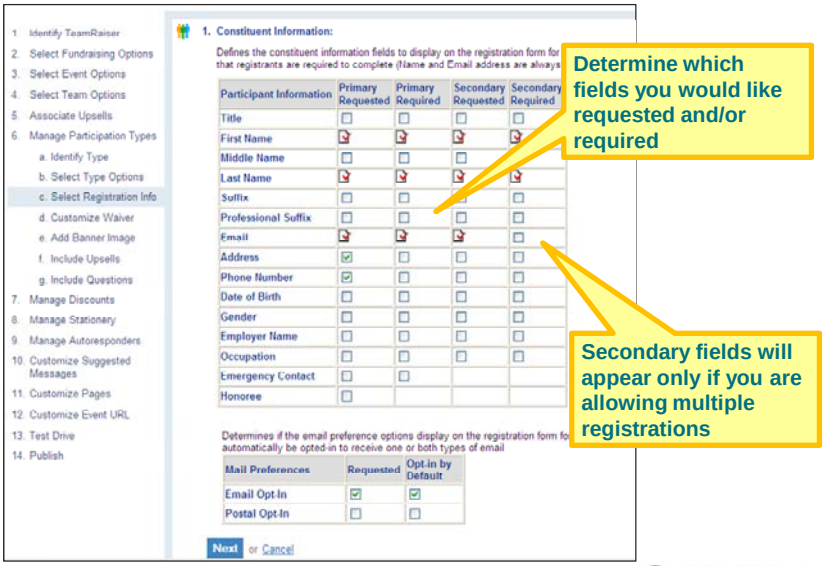
You may hide this Participation Type until a later time, if desired, on the **Availability** step. You can also generate race numbers or notify someone when this participation type is selected.

Selecting Registration Info



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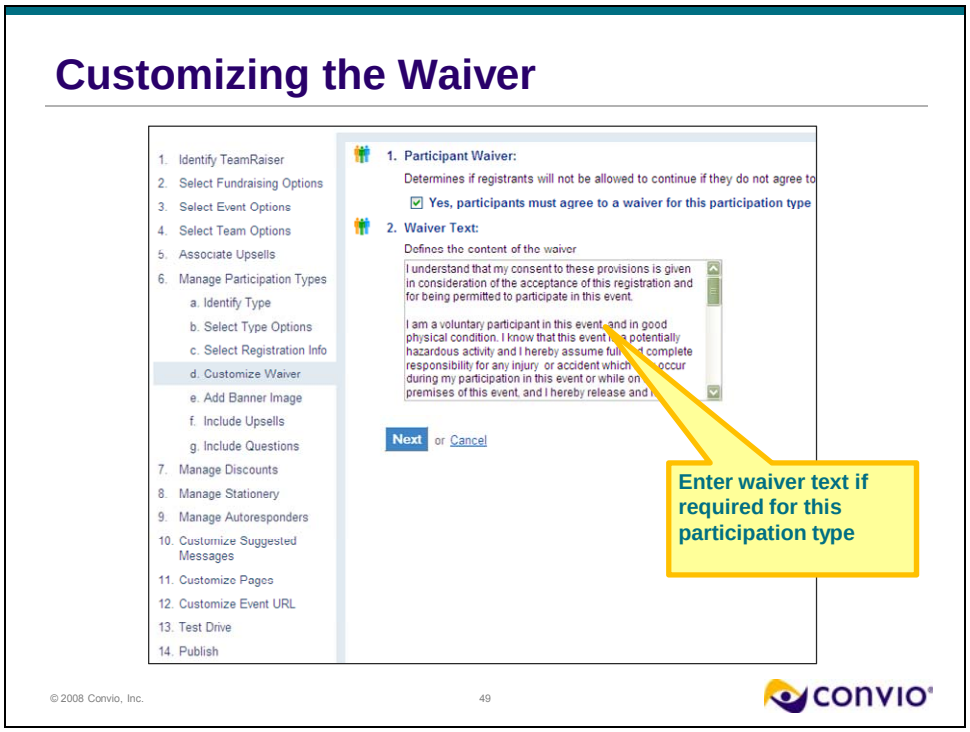
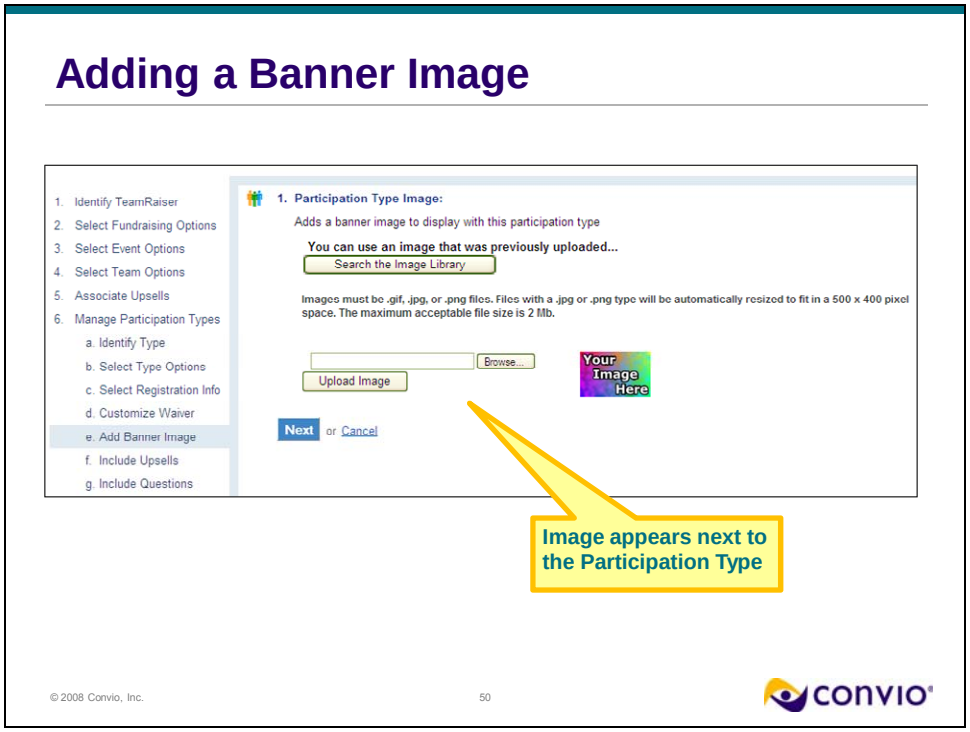
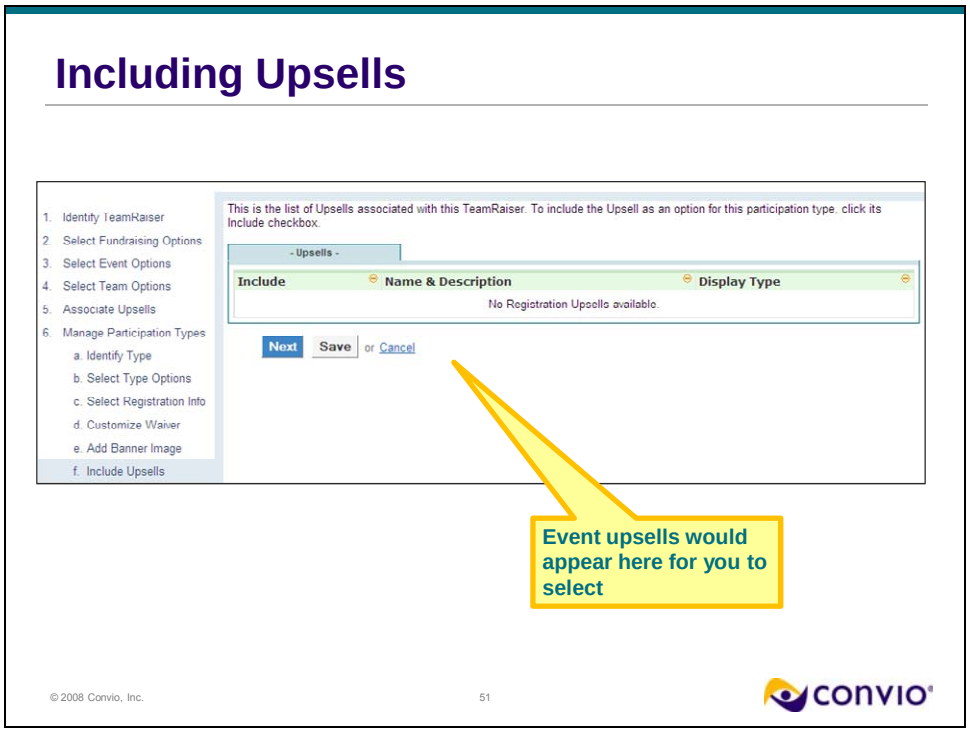
By default, first name, last name, and email are required for registration. You may elect to request and/or require additional fields. If you elected to allow multiple registrations on a previous step, you can also select which fields are requested and/or required for the additional participants.



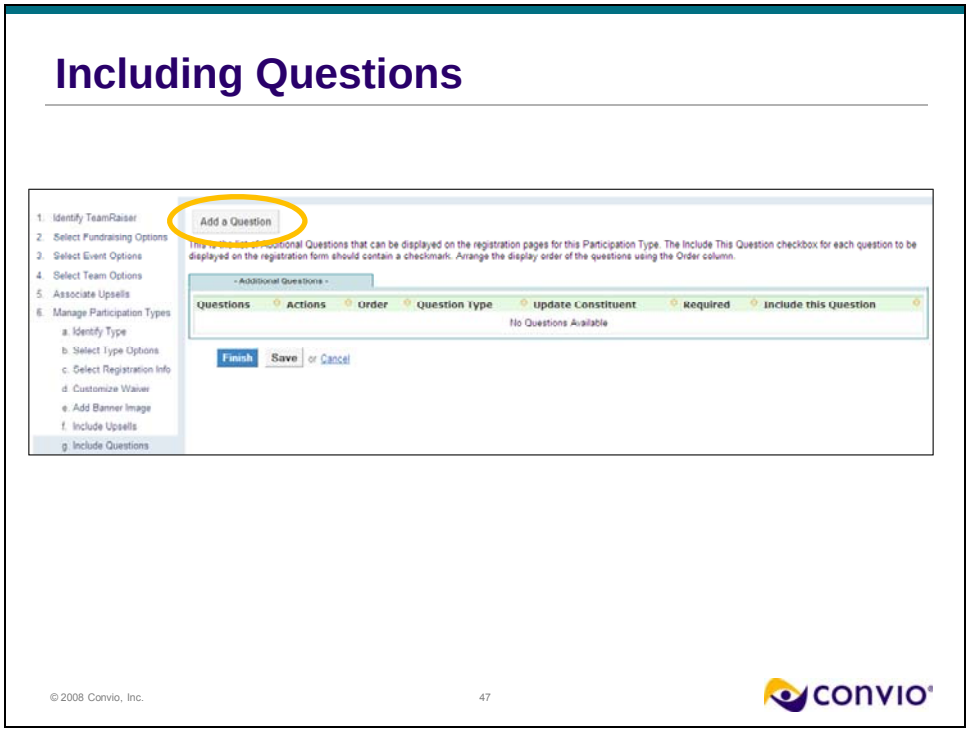
If you have a waiver that participants must agree to for this Participation Type before participating, insert the text here and make sure the box is checked.



If you choose to upload an image for the Participation Type, it will appear next to the Participation Type text during the user registration process.



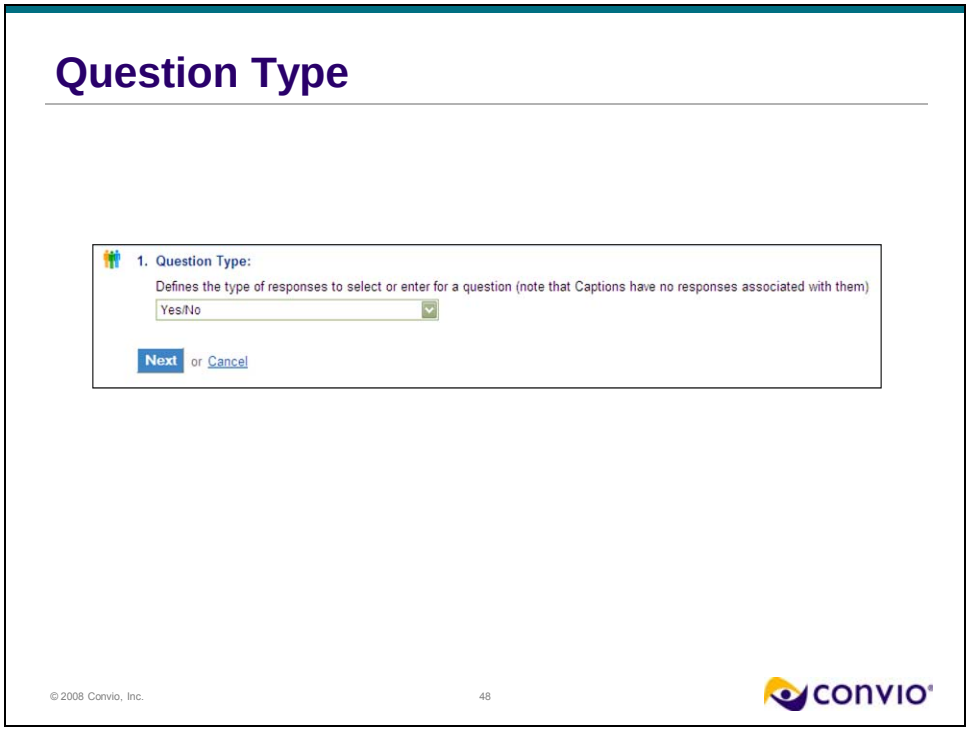
If you have created upsells for this event, they would appear in this list. Upsells could be things like jerseys, or timing chips, that would be an additional charge that participants can select (or not) during the registration process.



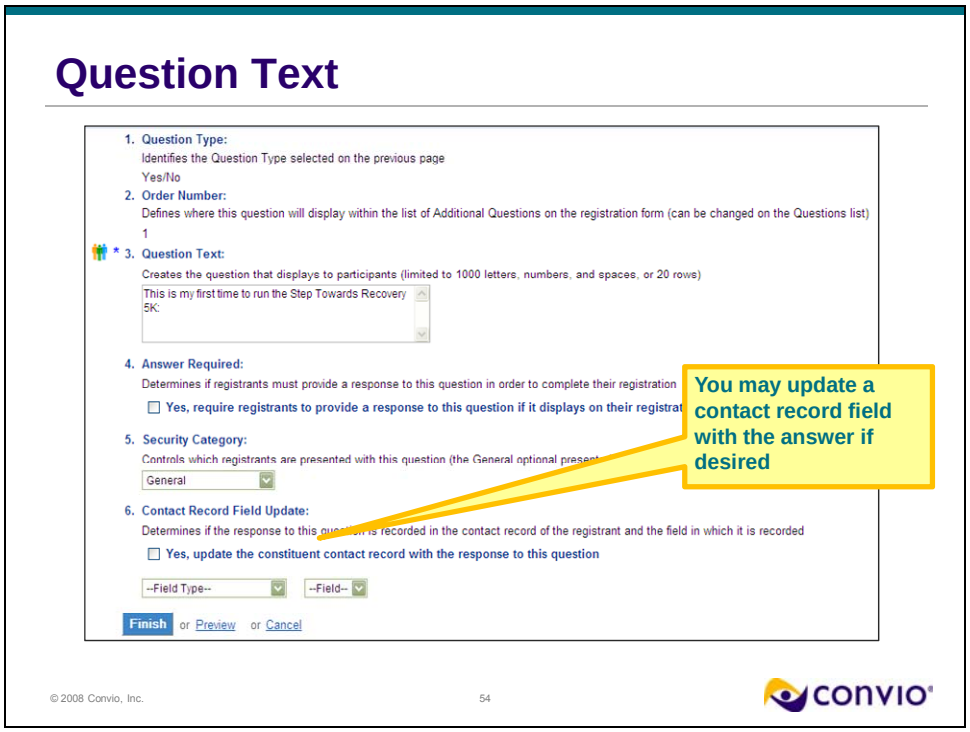
If you would like to capture specific information from participants during the registration process, you may include additional questions for the specific Participation Type, or you may add general event questions which are set up

on Step 3 of the Process Navigator under **Related Actions**. Let's add a Participation Type-specific question. To begin, click the ***Add a Question*** button.

.

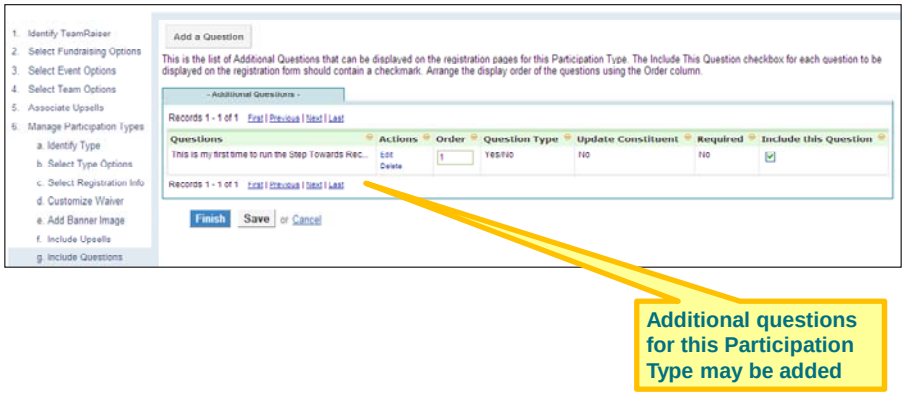


Pulling directly from the Convio Survey module, determine a Question Type based on the information you'd like to receive. In our example, we will ask a simple yes/no question.



Enter the question text and determine if an answer is required. You also have the option of updating a contact record with the answer, if desired.

Additional Questions



Additional questions for this Participation Type may be added

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To add addition questions for this Participation Type, repeat the process.

EXERCISE 1.3: Create an Event and Configure Common Options

Creating a TeamRaiser from Scratch

1. From the main TeamRaiser page, select the ***Create a TeamRaiser*** button
2. Fill in the Public Name, Date, Initial Participation Type and Fee from the questionnaire
3. Select to ***Create a new donation form for this TeamRaiser***
4. Click ***Finish***

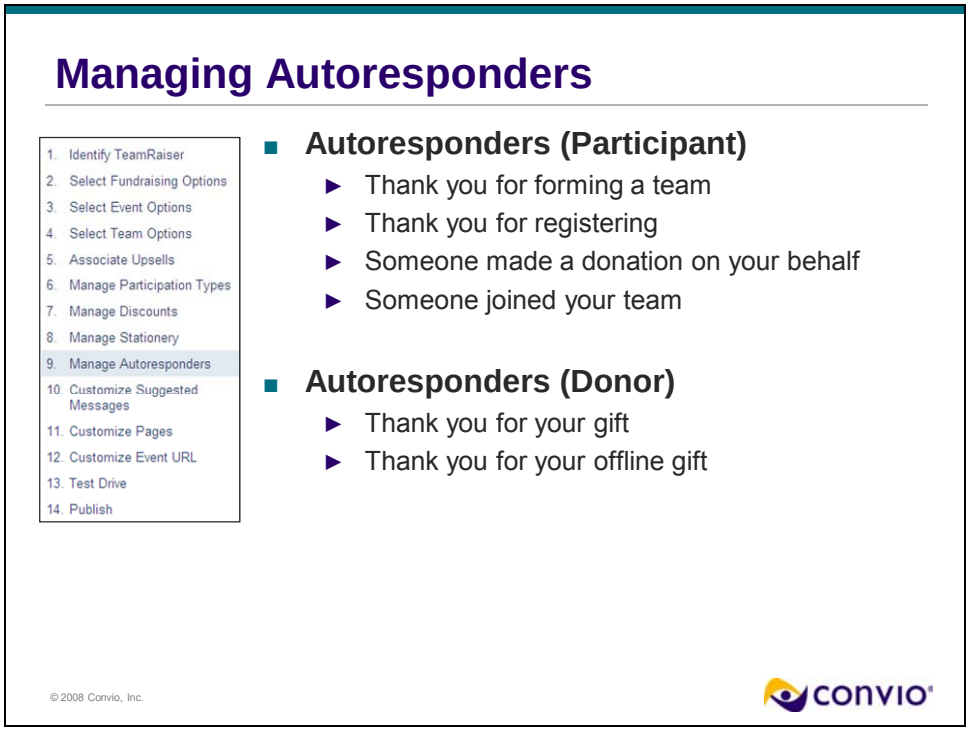
Configuring Common Options

Using the filled-out questionnaire as a guide and the Process Navigator hints on the right side of those pages, configure the event on your own. You can skip questions 2, 4 and 17 as we will discuss these later. If you get stuck, ask the instructor for assistance.

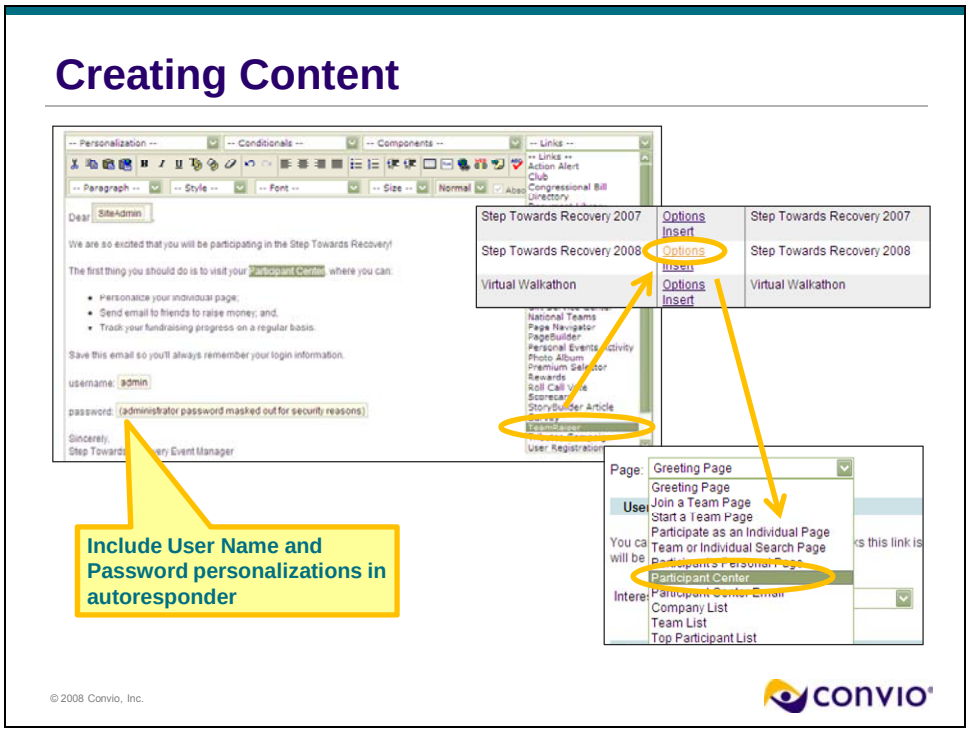
1. To begin, select ***Edit*** next to your TeamRaiser event

Identifying and Editing Critical Content

Autoresponders

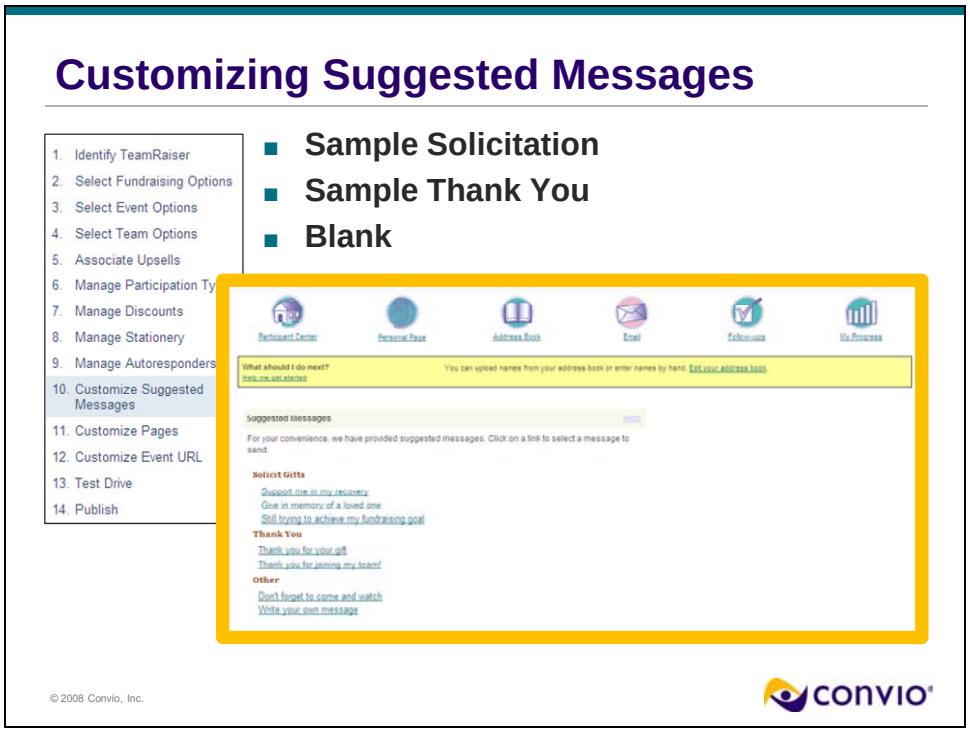


Here are the autoresponders that *must* be configured before your event goes live. Autoresponders may be disabled by clicking the appropriate link next to the autoresponder.

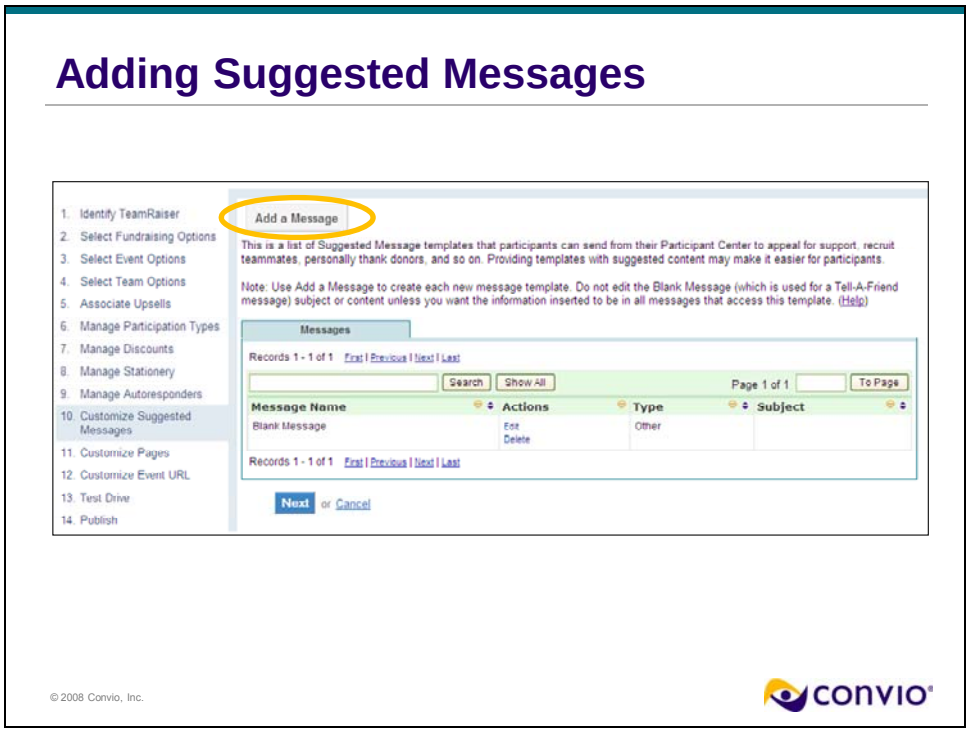


To create a link to the Participant Center, highlight the text to be linked, select ***TeamRaiser***, from the **Links** drop-down menu, select ***Options*** next to the correct event, then select ***Participant Center*** from the **Page** drop-down menu. You will also want to include the participant's User Name and Password as a reminder.

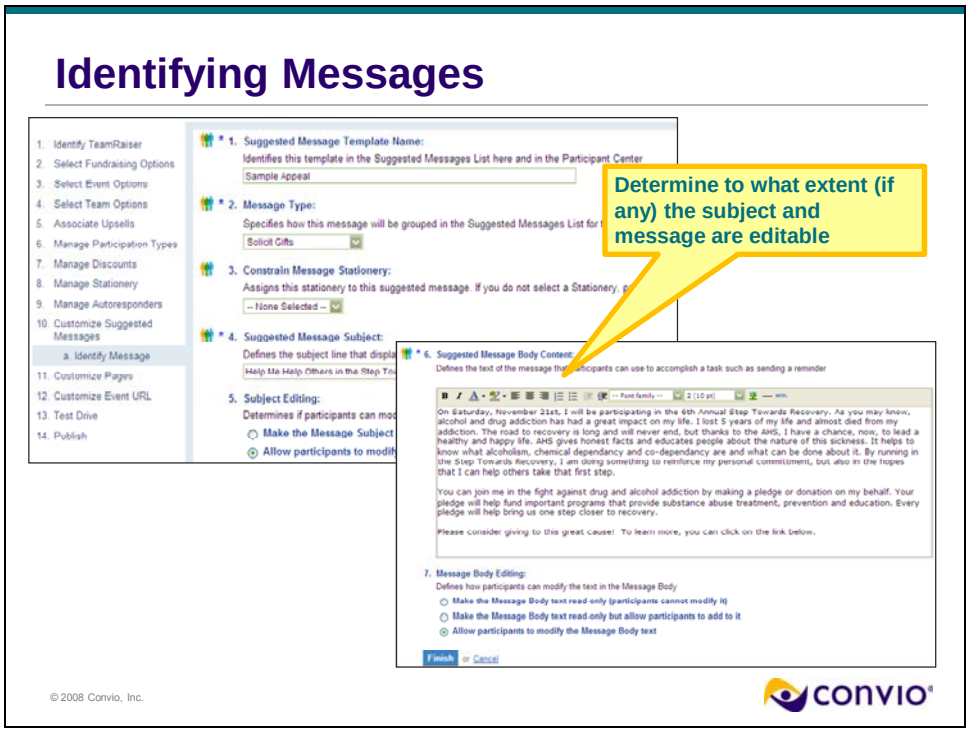
Suggested Messages



It is a good idea to provide at least one sample solicitation and one sample thank you suggested message.

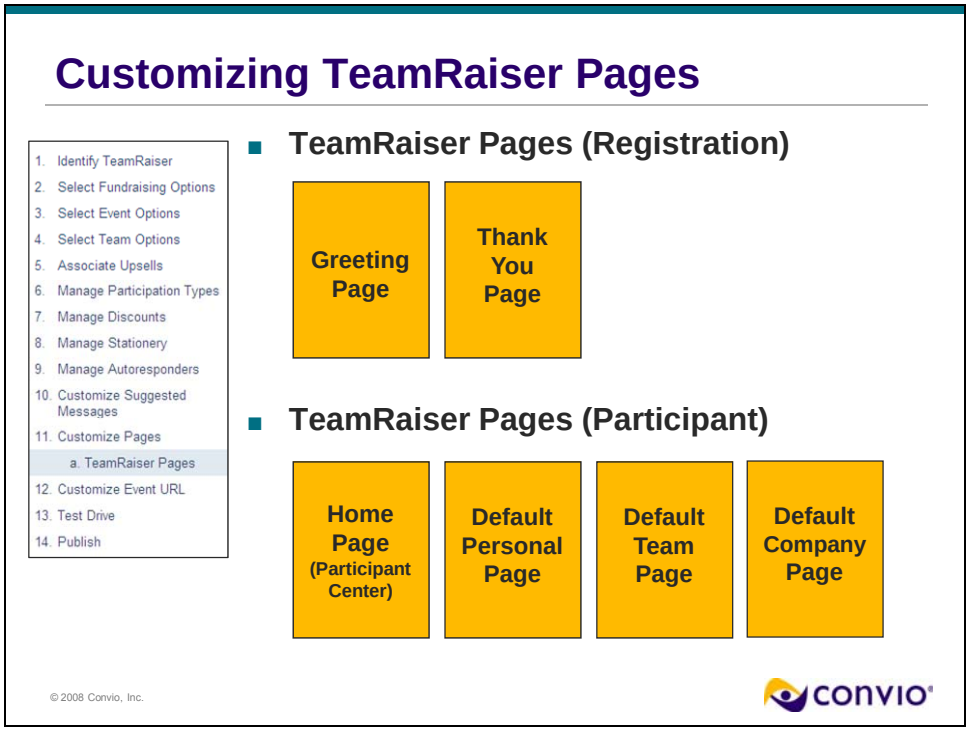


To add a new Suggested Message, click the ***Add a Message*** button.

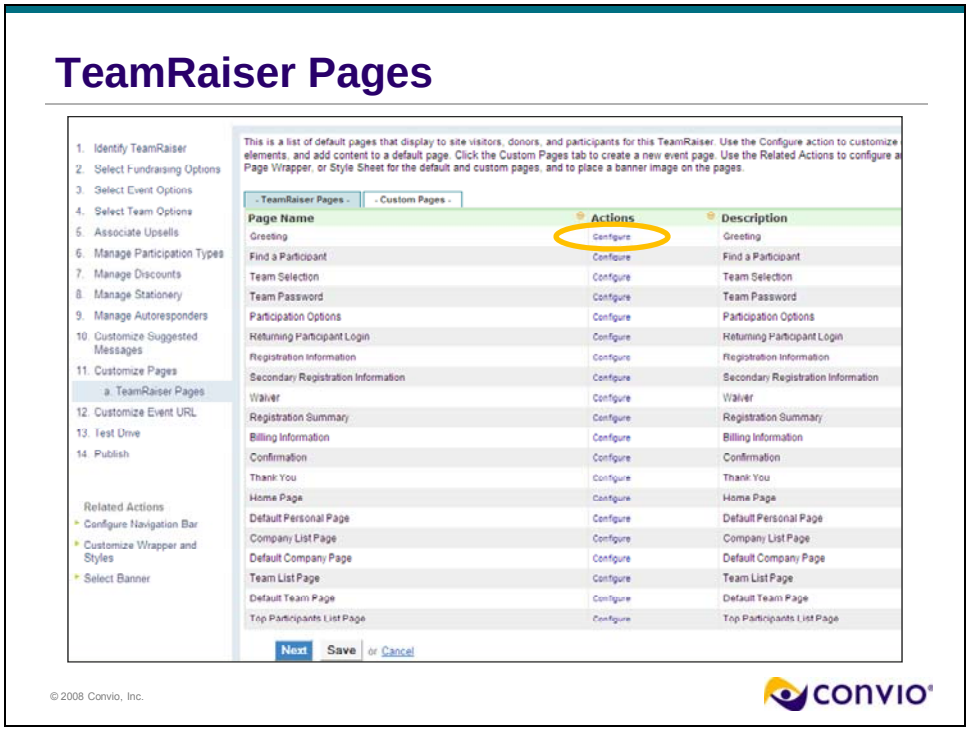


You will need to name the message, set a type and determine whether or not you will allow participants to choose from available stationery, or to use the one you designate. Subject and message text must also be entered, and you can determine to what extent (if any) you will allow participants to customize the subject or message.

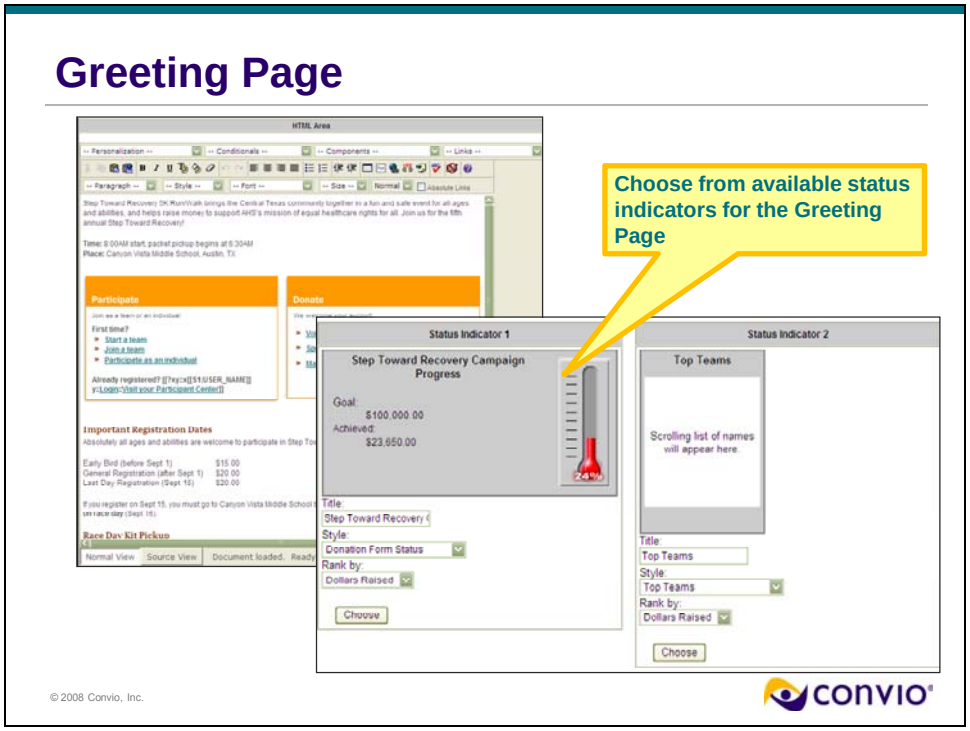
TeamRaiser Pages



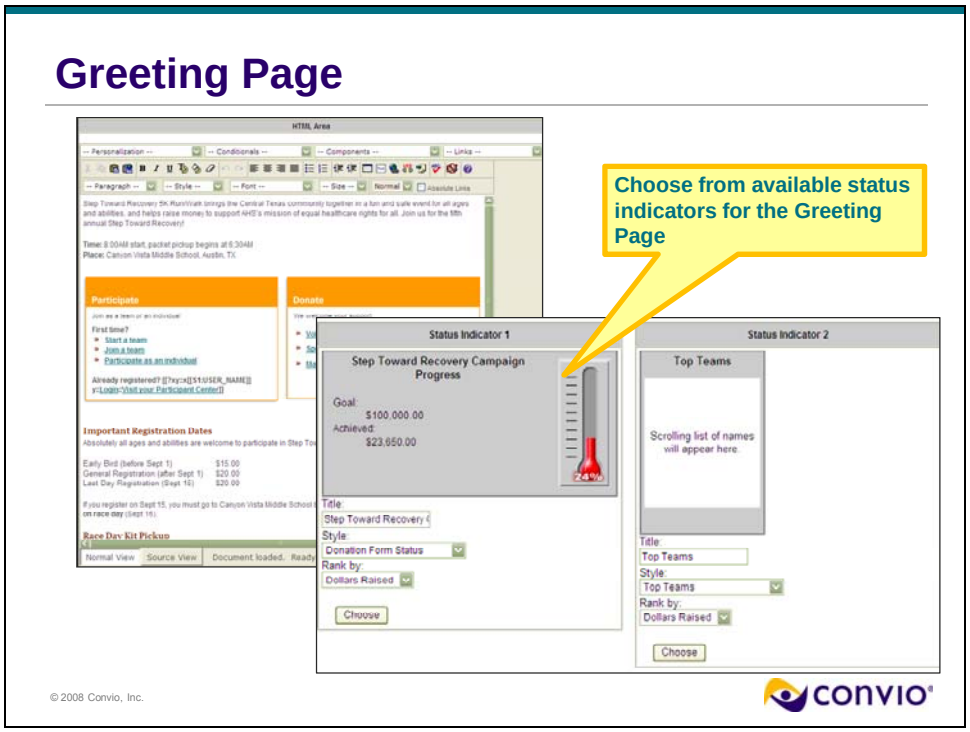
There are many pages that can be configured for your event, but only a few that would be considered “critical content” areas. Of those pages, the five that are called out above would be the critical content pages.



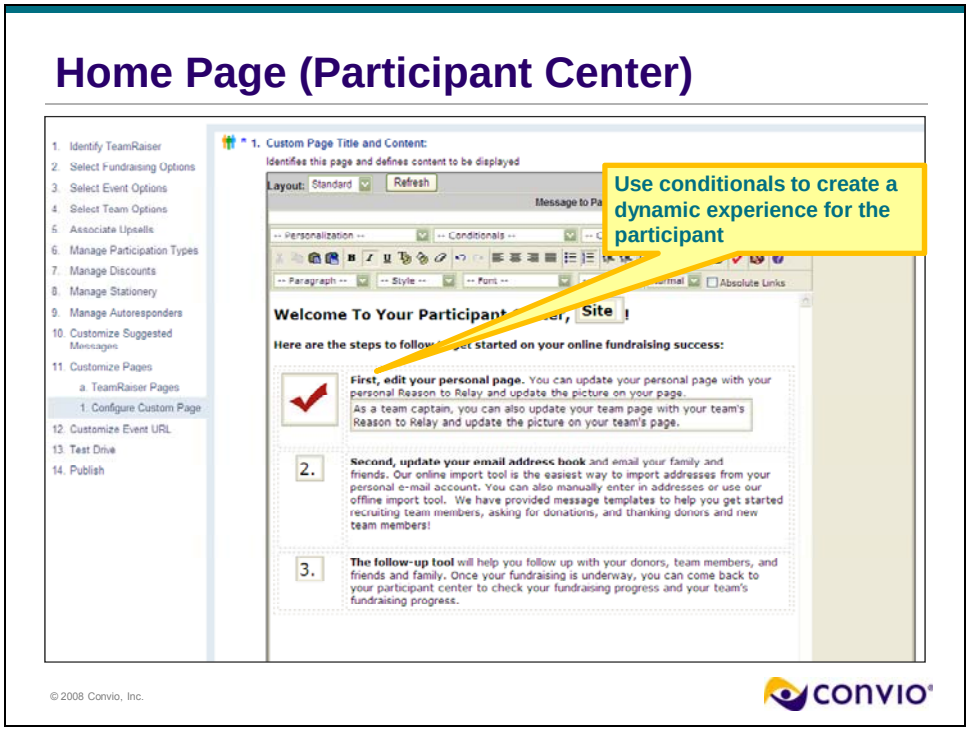
To configure a particular page, click ***Configure*** next to the page in the **Actions** column.



For the Greeting Page you may select which status indicators will appear in addition to the content.

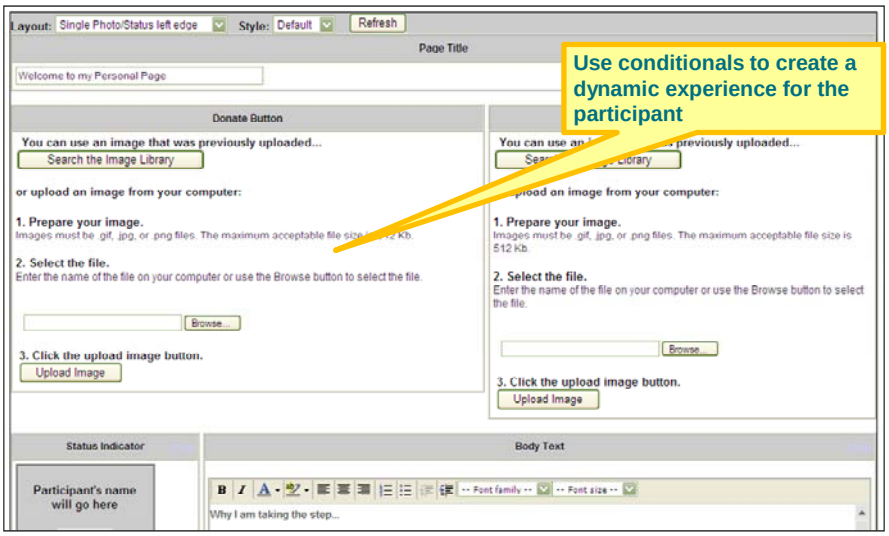


On the Thank You page, be sure to include a prominent link to the Participant Center and clearly guide the participant to the next steps.



The Home Page of the Participant Center is a great place to communicate with your participants. Again, be sure to outline next steps and try using conditionals to create a dynamic experience for your participants once they have completed the actions. This may also be a good place to include fundraising tips.

Default Personal Page



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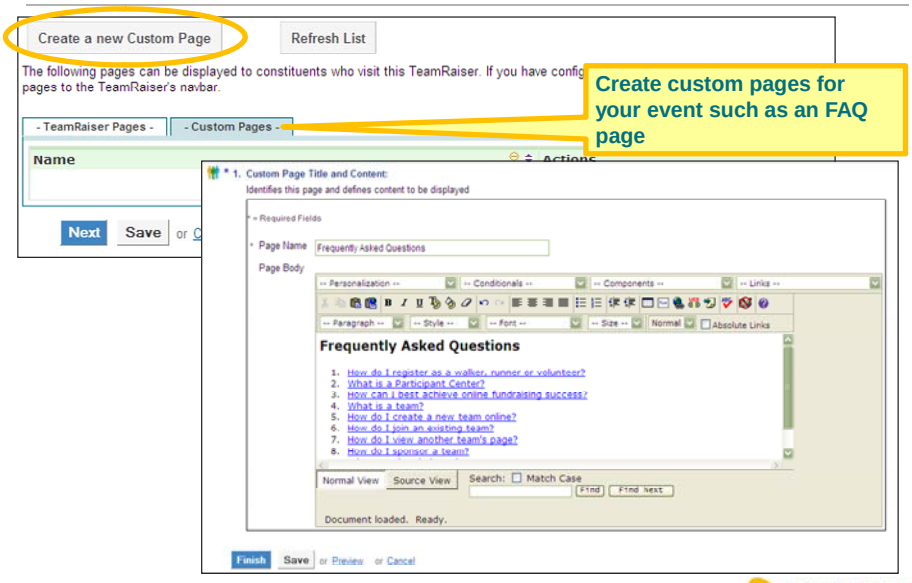
You should always create default content for the personal page in the case that participants do not personalize them.

Custom Pages



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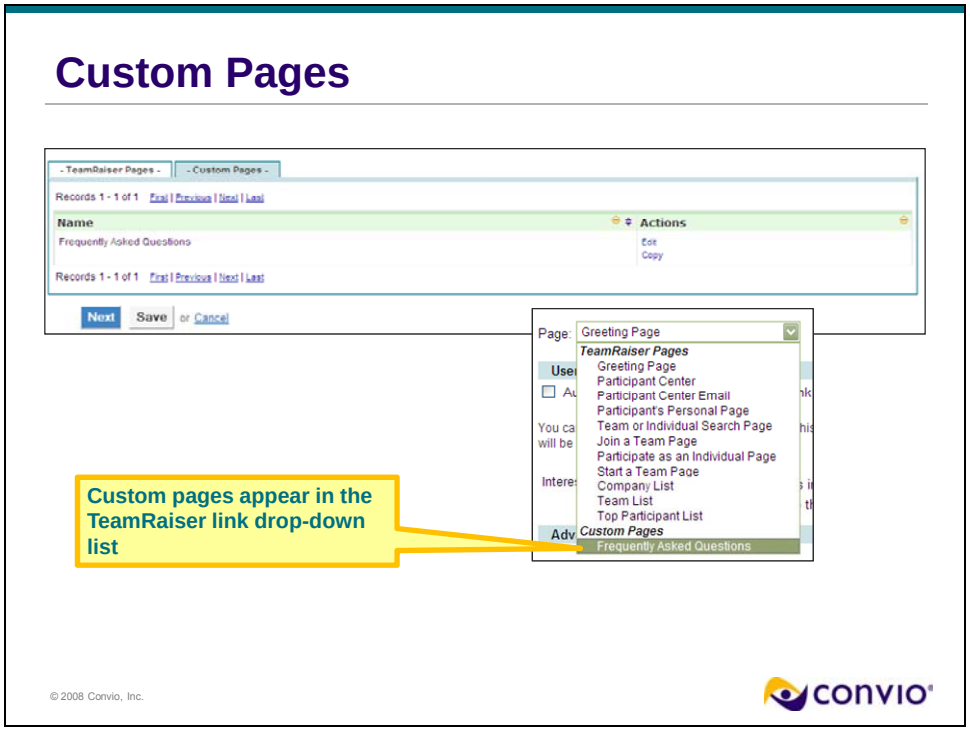
You can also create custom pages for your event by clicking on the ***Custom Pages*** tab and clicking the ***Create a new Custom Page*** button. Name the page and enter the content.



You can link to custom pages the same way you would other TeamRaiser pages by highlighting the text to be linked, selecting ***TeamRaiser*** from the **Links** drop-down menu, selecting ***Other*** next to the desired event, then selecting the Custom Page from the **Page** drop-down menu.

EXERCISE 1.4: Use TeamRaiser-Specific Links and Conditionals

Creating a Link to the Participant Center on the Thank You page

1. From the **Customize Pages** step on the Process Navigator, select ***Configure*** next to the **Thank You** page
2. In the WYSIWYG type [`Access your Participant Center now!`] and highlight the text
3. Select ***TeamRaiser*** from the **Links** drop-down menu
4. Select ***Options*** next to your event
5. Select ***Participant Center*** from the **Page** drop-down menu

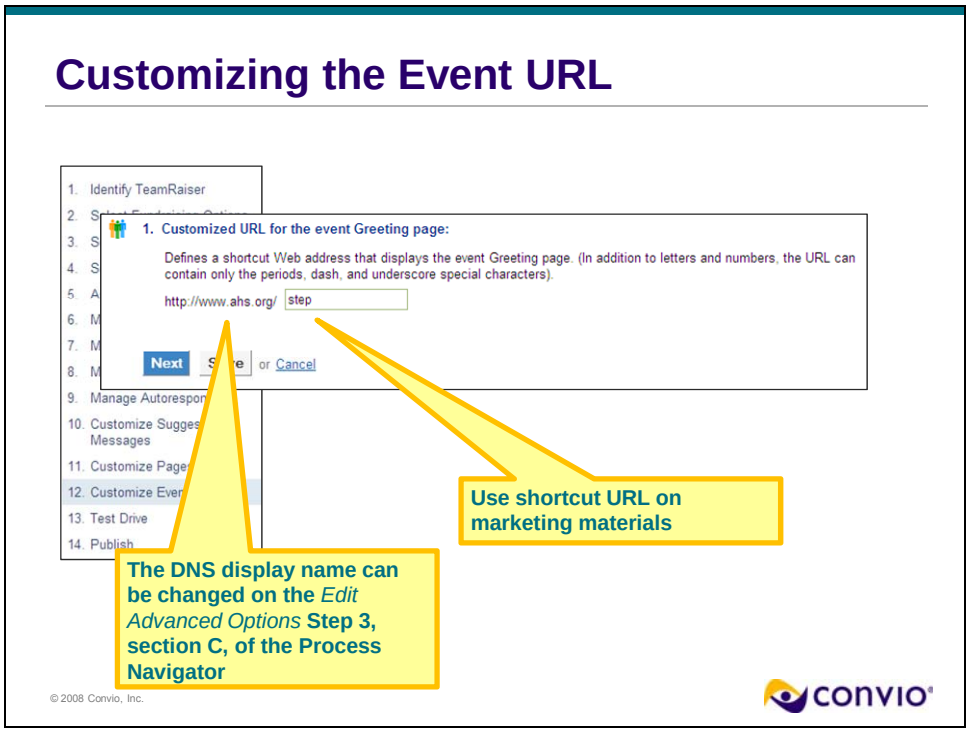
* Creating a Conditional to Display Participant Center Link on the Greeting Page

1. From the **Customize Pages** step on the Process Navigator, select ***Configure*** next to the **Greeting Page**
2. In the WYSIWYG type [`My Participant Center`] and highlight the text
3. Link to the Participant Center following the previous exercise
4. Highlight the text again and select ***Has a Participant Center*** from the **Conditionals** drop-down menu

Creating a 'Personal Page Updated' Conditional on the Home Page

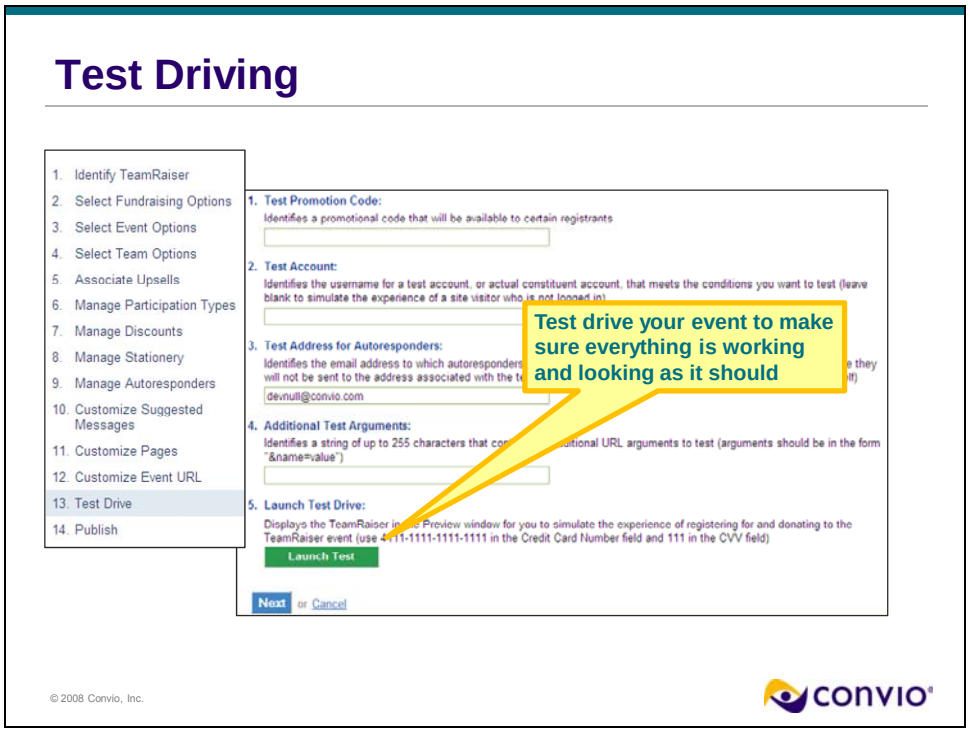
1. From the **Customize Pages** step on the Process Navigator, select ***Configure*** next to the **Home Page**
2. In the WYSIWYG type [`Your Personal Page has been updated!`] and highlight the text
3. Select ***Personal page updated*** from the **Conditionals** drop-down menu
4. Right click on the gray conditional box and select ***Personal page not updated***
5. In the blank box type [`First, update your Personal Page`]

Customizing the Event URL



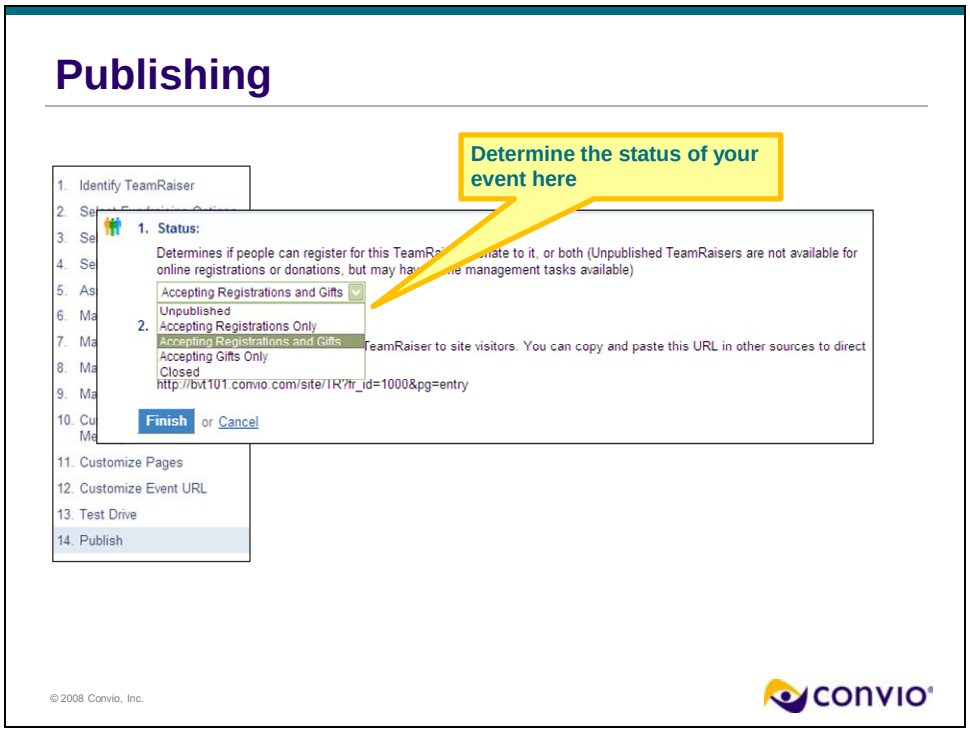
You can also create a shortcut, or friendly, URL to your event that is simple, easy to remember, and looks good on your marketing materials. The shortcut will take users directly to the Greeting Page of your event. The DNS display name can be changed on the ***Edit Advanced Options***, Step 3, section C, of the Process Navigator.

Test Driving



You can “test drive” your event without creating new constituent records or false donations for the event. This is a good opportunity to examine your content and flow, and make sure all links point to the appropriate places.

Publishing



Finally, when you are ready to “go live” with the event, select the desired status.

EXERCISE 1.5: Create an Event URL and Publish

Creating a Shortcut URL to the Event

1. Go to the **Customize Event URL** step on the Process Navigator
2. Enter a short name for your event in the box provided
3. Click ***Next***

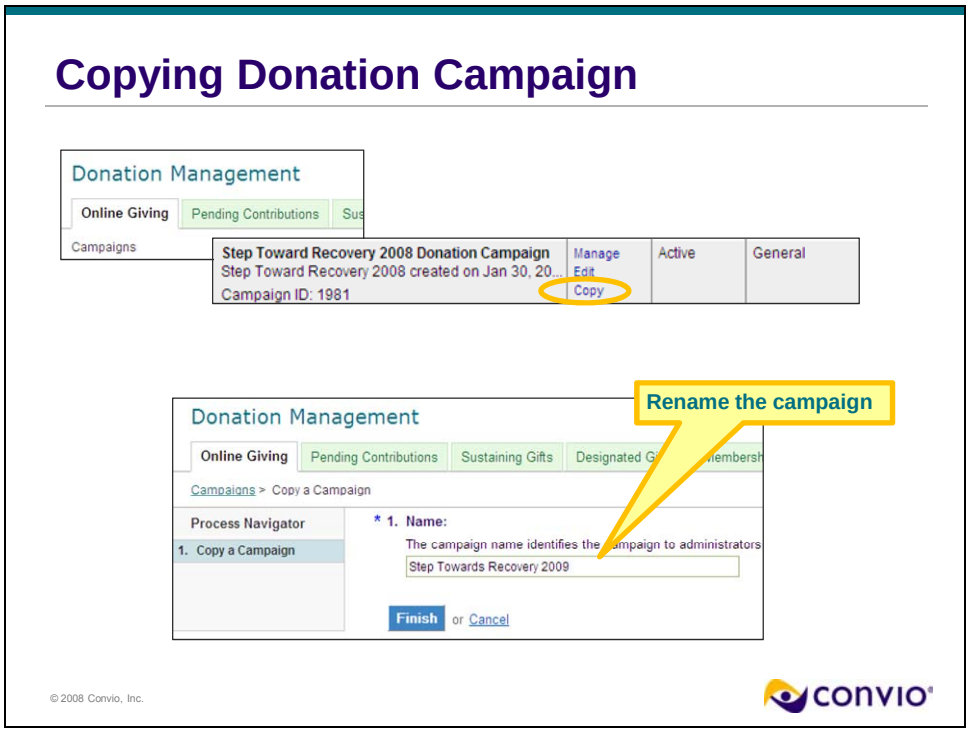
Publishing the Event

1. Go to the **Publish** step on the Process Navigator
2. Change the **Status** to ***Accepting Registrations and Gifts***
3. Click ***Finish***

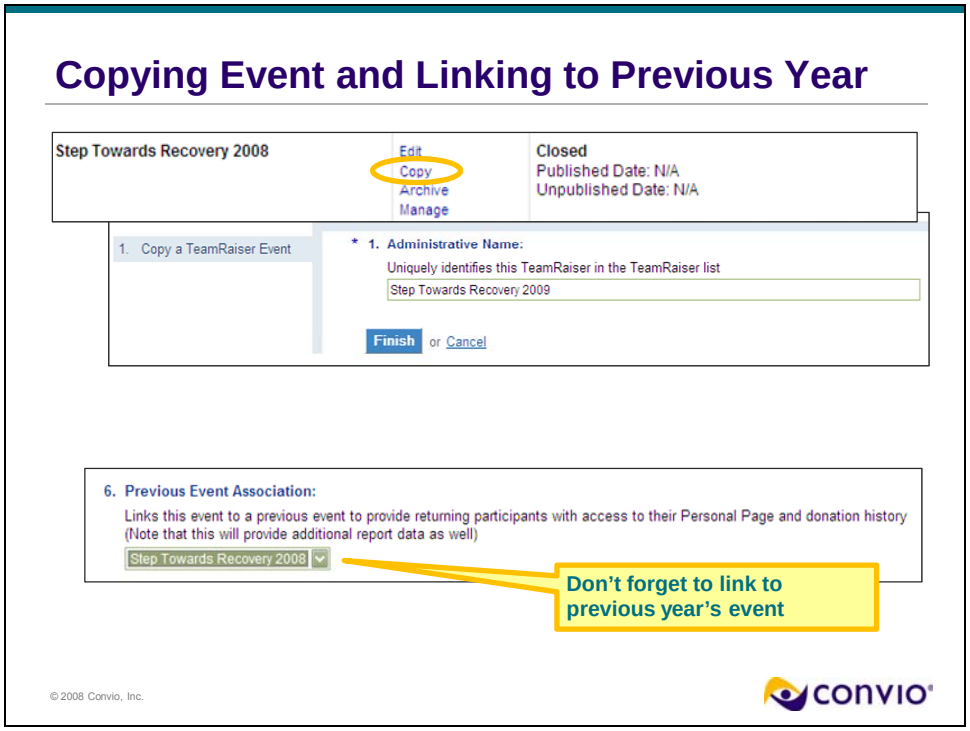
Testing the Shortcut URL

1. Open a new browser window and type your URL shortcut in the address bar
2. You should be taken to the Greeting Page for your event

Next Year's Event



The first step you will need to do is copy the previous year's donation campaign and rename it.Make sure to change the name of the donation form as well as the campaign.



For the TeamRaiser event, use the ***Copy*** feature which will copy all of your event settings as well as any content. Make a few adjustments to the content or configuration and publish your event in half the time it takes to create a new one. Remember to link the current event to the previous year's event and associate the event with the new donation form.

Next Year's Event Review

1. Copy and rename the previous year's donation campaign.

2. Rename the copied donation form and make any adjustments if needed.

3. Copy and rename the previous year's TeamRaiser event.

4. Associate the event with the previous year.

5. Assign the new donation form to this event.

EXERCISE 1.6: Next Year's Event

Copying and Renaming the Donation Campaign

1. Find the Donation Campaign for your past event in Donation Management
2. Click the ***Copy*** link in the **Actions** column
3. Rename the campaign to reflect your upcoming event and click ***Finish***

Renaming the Donation Form

1. Next to the new Donation Campaign, click the ***Manage*** link
2. Next to the Donation Form, click the ***Edit*** link
3. Change the name of the form to reflect your upcoming event and click ***Save***

Copying the Event

1. From the main TeamRaiser list page select ***Copy*** next to the desired event
2. Name your new event
3. Click ***Finish***

Linking to Previous Year and Associating with the New Donation Form

1. Click ***Edit*** next to the copied event
2. Select your previous event from the **Previous Event Association** drop-down menu
3. Click ***Next***
4. Select the new donation form from the **Donation Form** drop-down menu
5. Click ***Save***

TeamRaiser Management

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Overview

In TeamRaiser Management we will look at various aspects of managing your event once it has been published and registration is underway.

Objectives

Objectives

In this section, you will see how to:

- Manage Various Aspects of an Event, Including:
  - Participants
  - Teams
  - Gifts
  - Companies
- Configure and Send Coaching Emails
- Configure and run TeamRaiser reports

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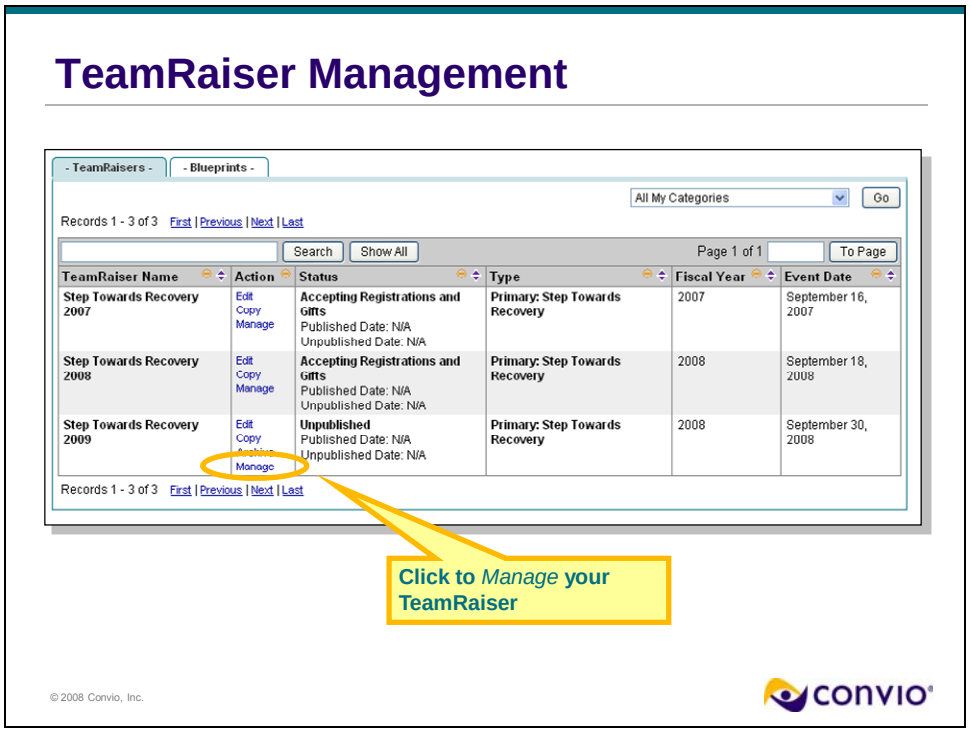
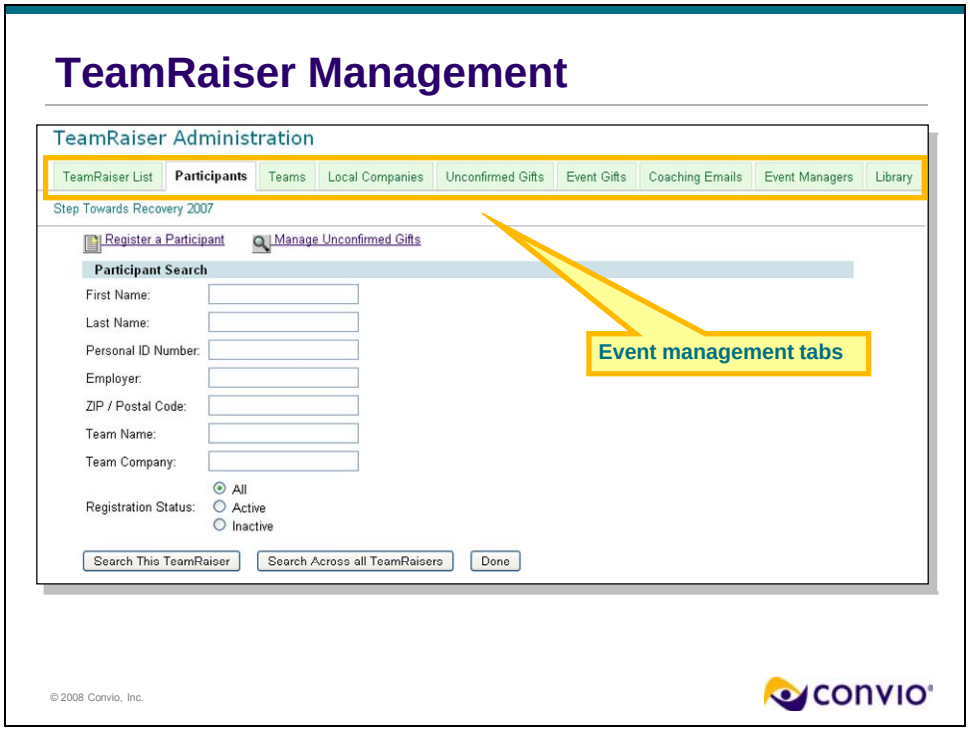
2

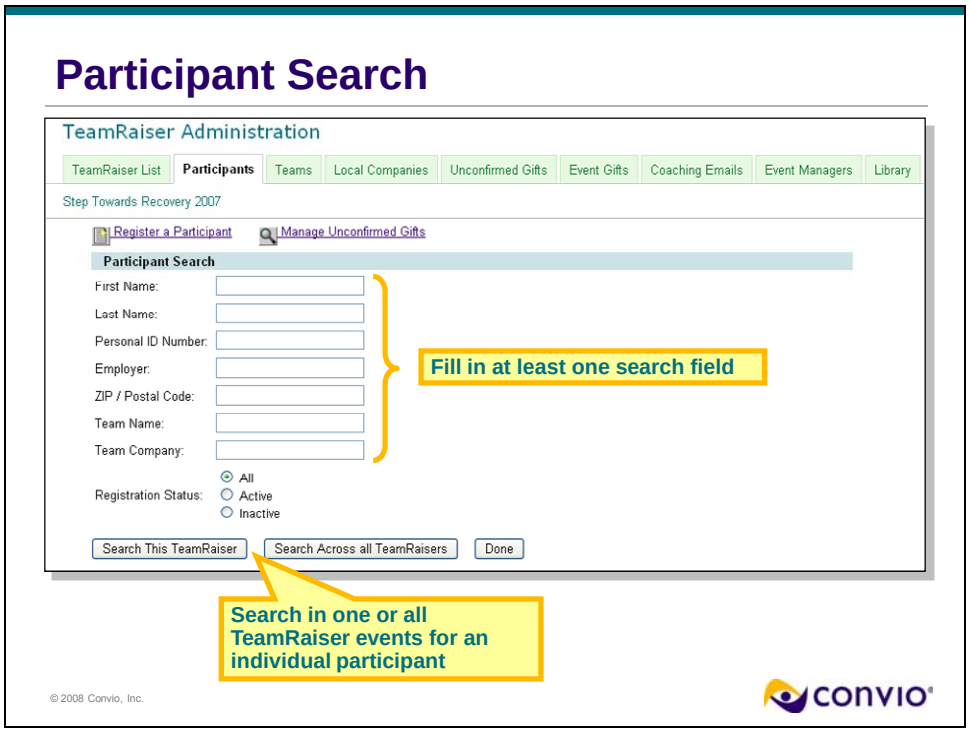
Managing Participants



To manage an event, click the ***Manage*** link next to the desired event.

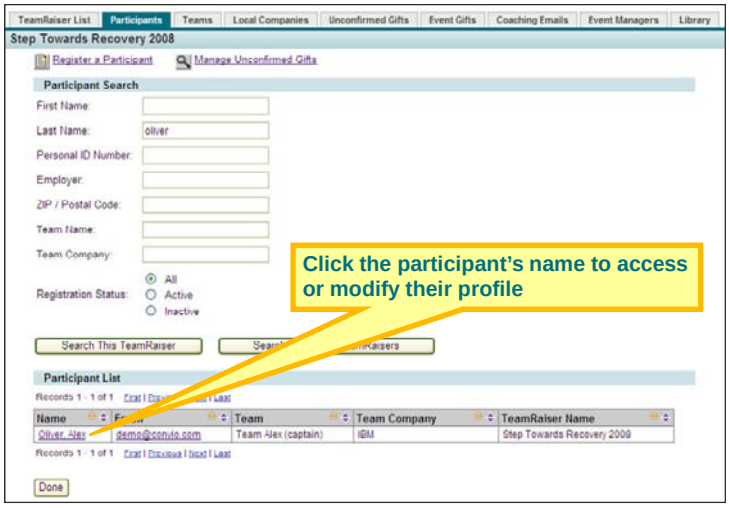


The second-level tabs near the top of the page will help you in managing the event. As you'll learn, there are several different ways to get to the same information or task.



You may search for a participant in this event, or all TeamRaiser events by entering at least one search criteria, and clicking either the ***Search This TeamRaiser*** button or the ***Search Across all TeamRaisers*** button.

Participant Search Results



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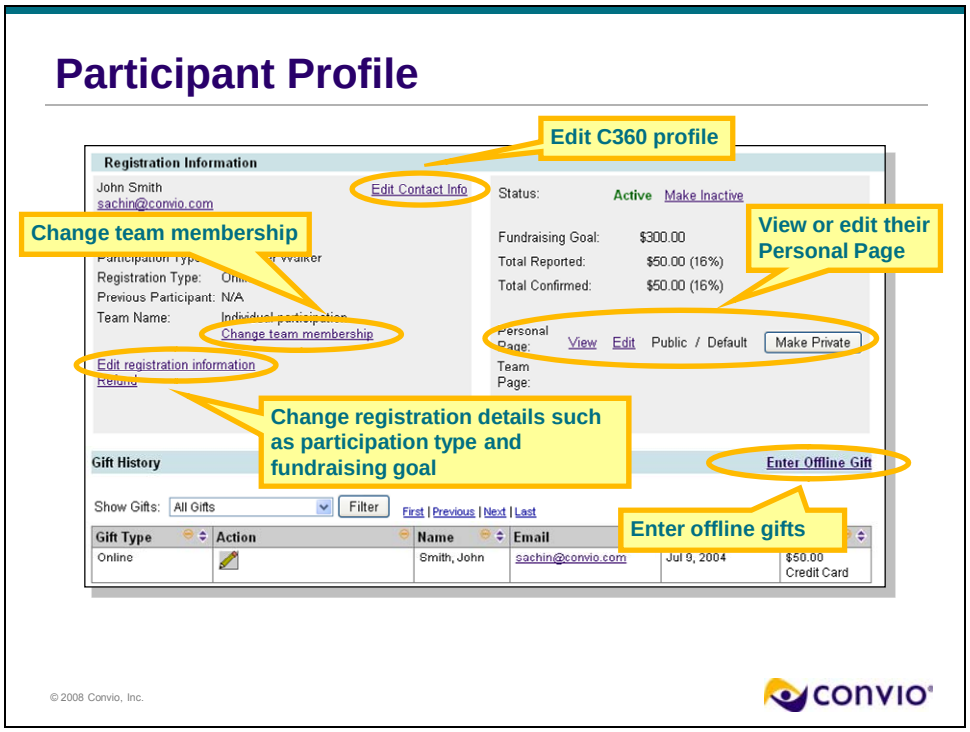
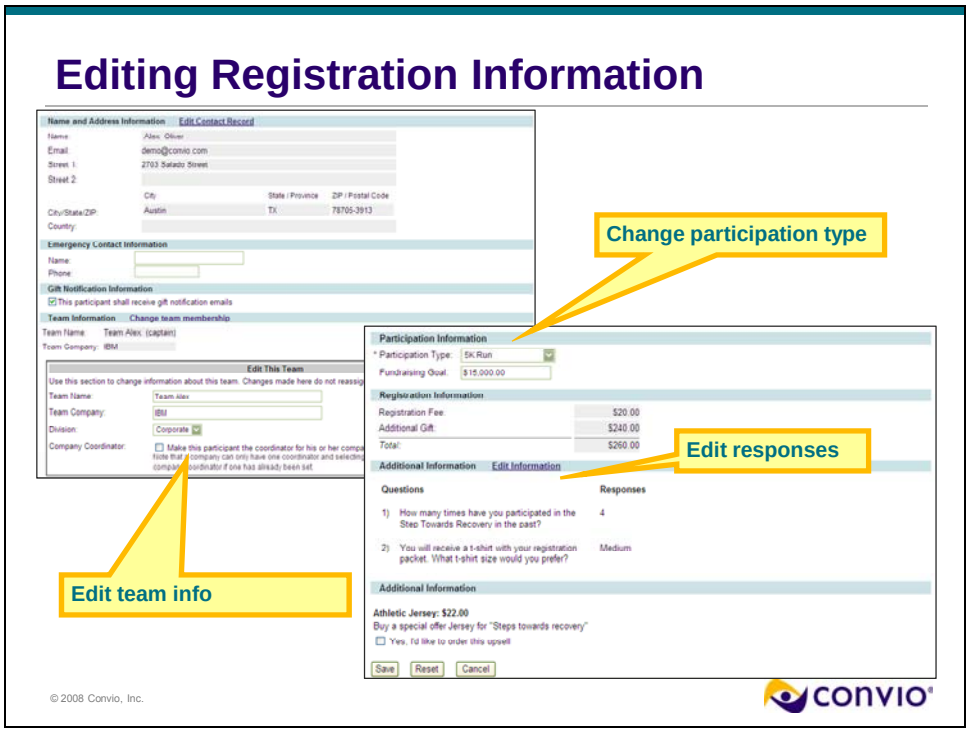
If the search turns up a participant, you will know that this person is registered for the event and you can see for which event they are registered by looking at the **TeamRaiser Name** column. Click the participant's name to access and/or modify their profile where you can:

- View participation type and donation history
- Enter offline donations
- Change team membership
- View or disable personal pages

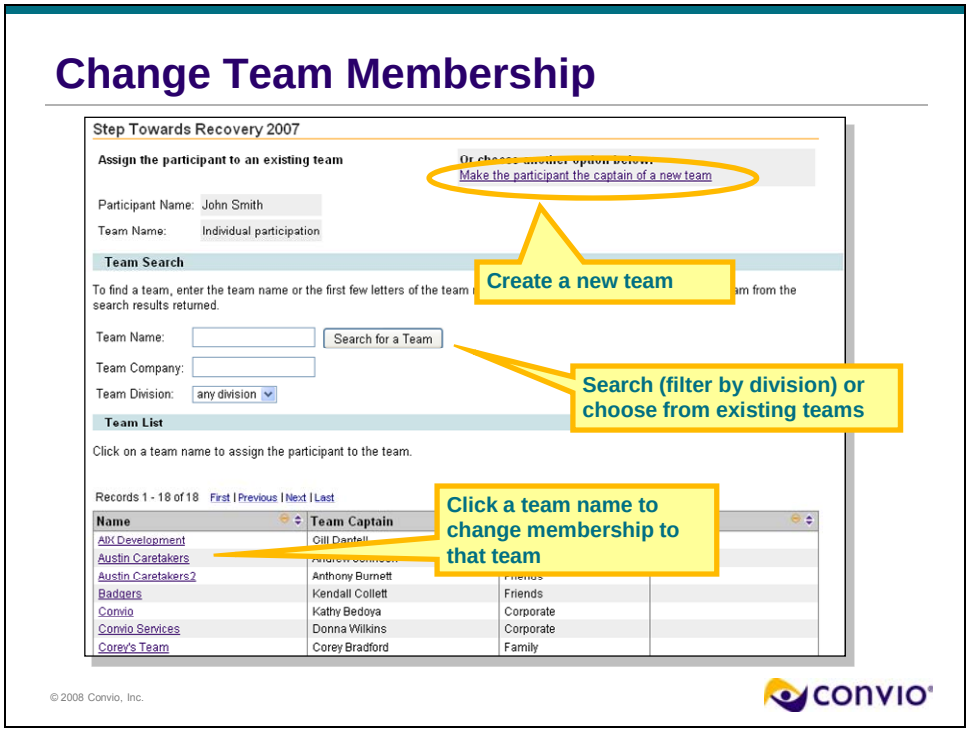


From this page, you can:

- View & modify registration information, including:
  - Name & Address
  - Team Information
  - Participation Information
  - Payment Information
- View & edit gift history
- View personal page and disable if necessary (for objectionable content or participant withdrawal)
- Access participant's full Constituent360 profile

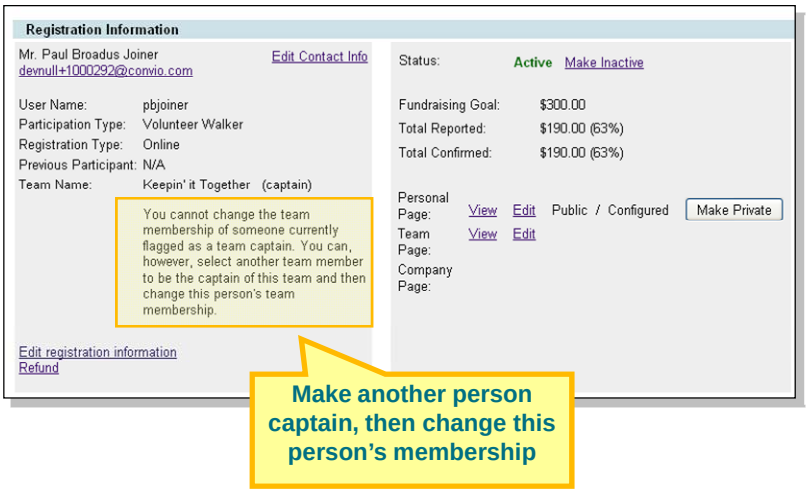


From this page, you are able to edit registration information such as team, participation type and responses to event questions.



Clicking the ***Change Team Membership*** link on the main profile page, will allow you to assign an individual to a team, reassign a team member to a different team or change team captain assignments.

Special Considerations: Team Captains



Make another person captain, then change this person's membership

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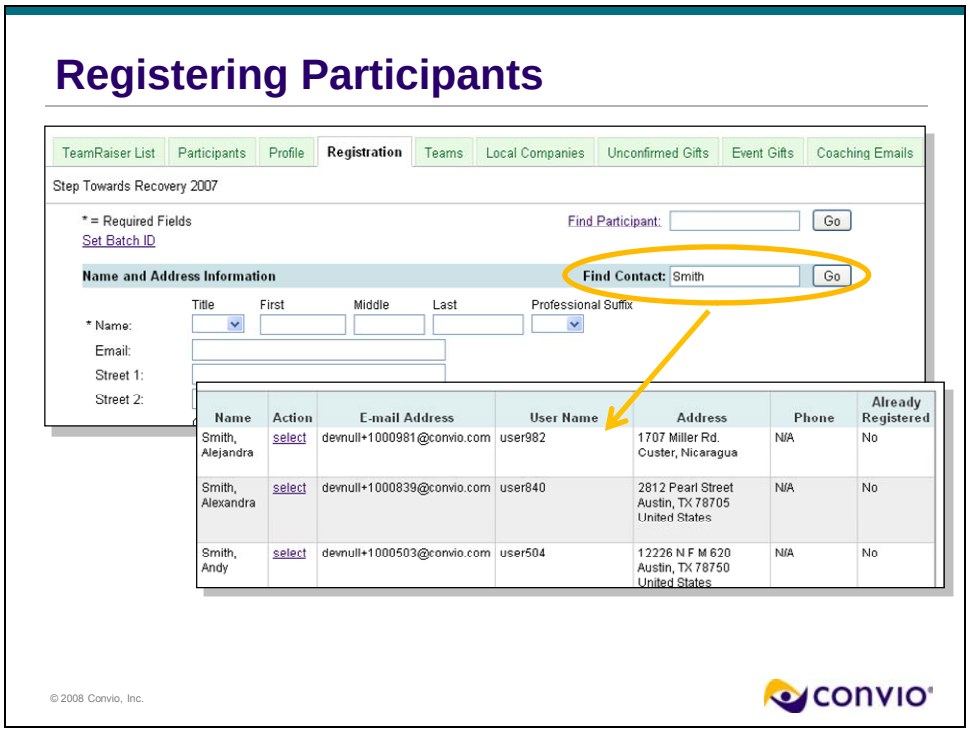
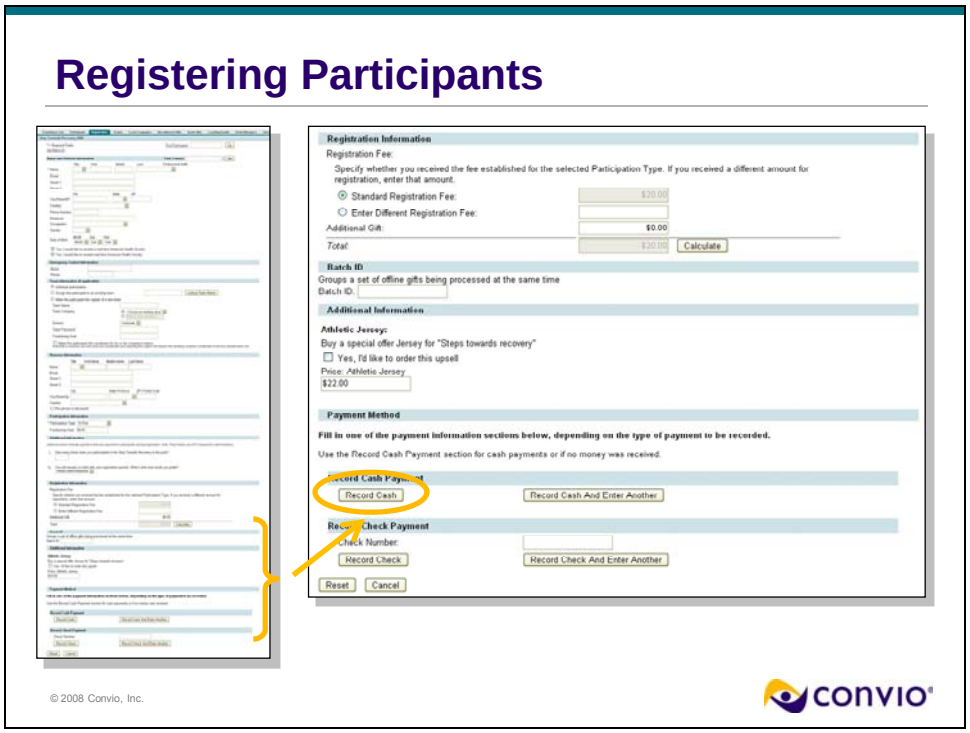
You cannot change the team membership of someone currently flagged as a team captain. You must first promote another team member to captain of the team before you can change team information for the current captain.



When registering a new participant from the administrative side, if the registrant already has a contact record in C360, you can use the **Find Contact** field to find this person and add them as a Participant.



Once all registration options have been selected, you may record the payment as cash or check, or credit card if you have that enabled.

EXERCISE 2.1: Managing Participants

Searching for a Participant

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

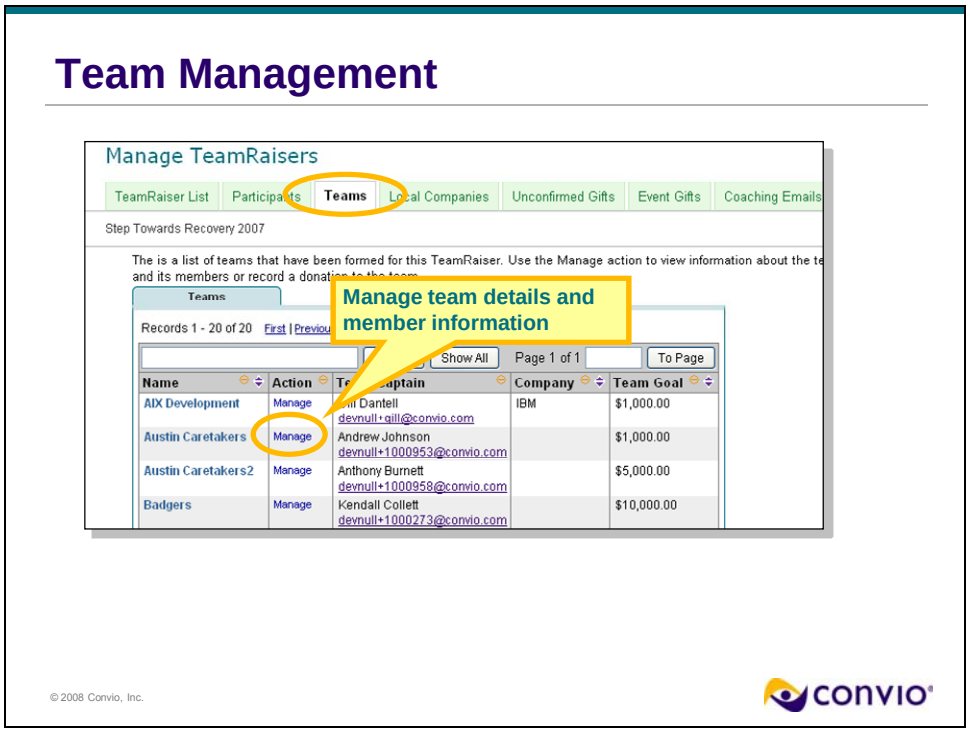
View the Participant's Personal Page

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

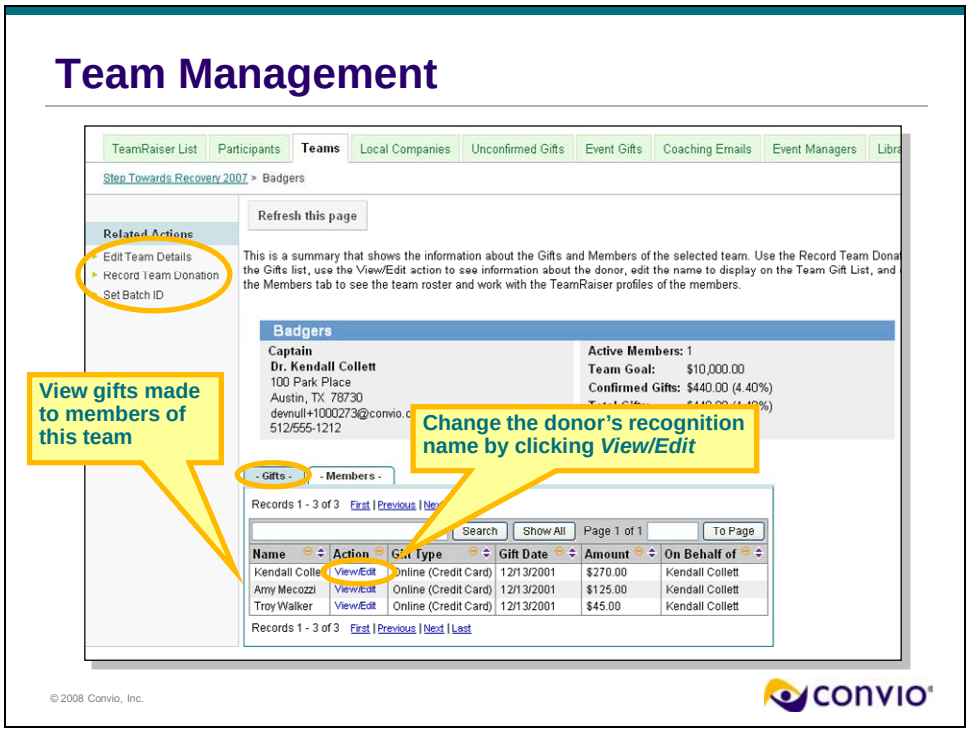
Assign the Participant to a Team

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**

Managing Teams

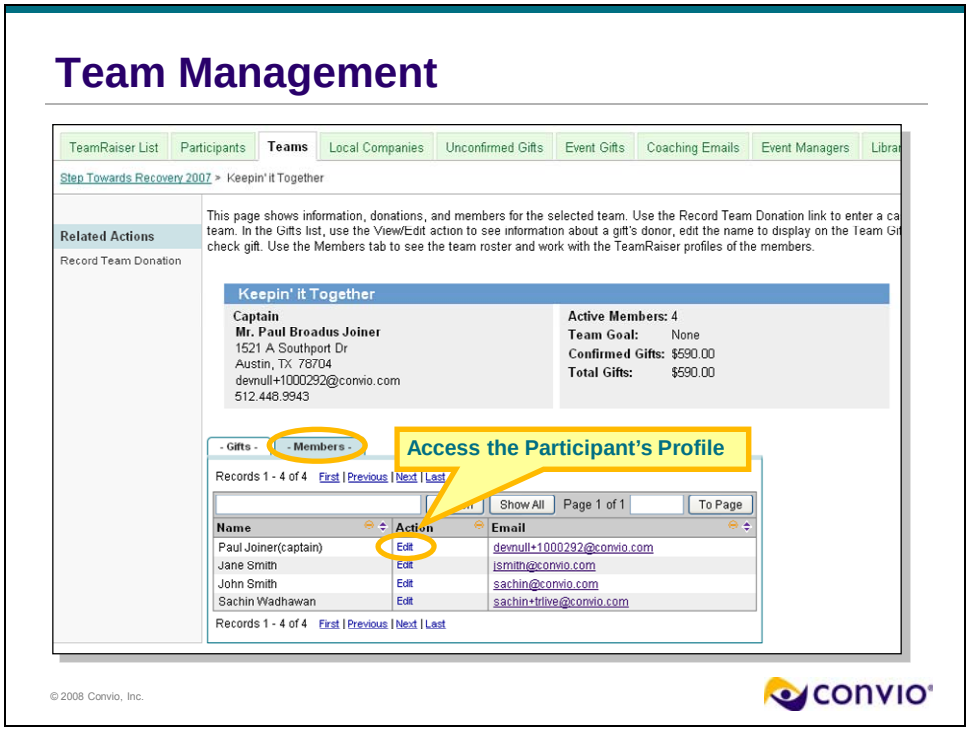


By clicking the ***Teams*** tab, you are able to see a list of teams registered for this event. Clicking on the ***Manage*** link next to team will allow you to view and manage details about the team and member information.



From here, you can see all gifts that were made to members on this team as well as gifts made directly to the team. You can edit team details such as the name, goal, associated company and division. You can manually record donations made to the team or set a batch ID for accounting purposes. Clicking the ***View/Edit*** link next to

a gift allows you to change whether or not the gift amount is displayed in the scrolling list as well as the ability to change the recognition name that shows on the scrolling list.



By clicking on the ***Members*** tab, you will see a list of all members of this team. The ***Edit*** link in the **Actions** column will take you to the participant's profile page.

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

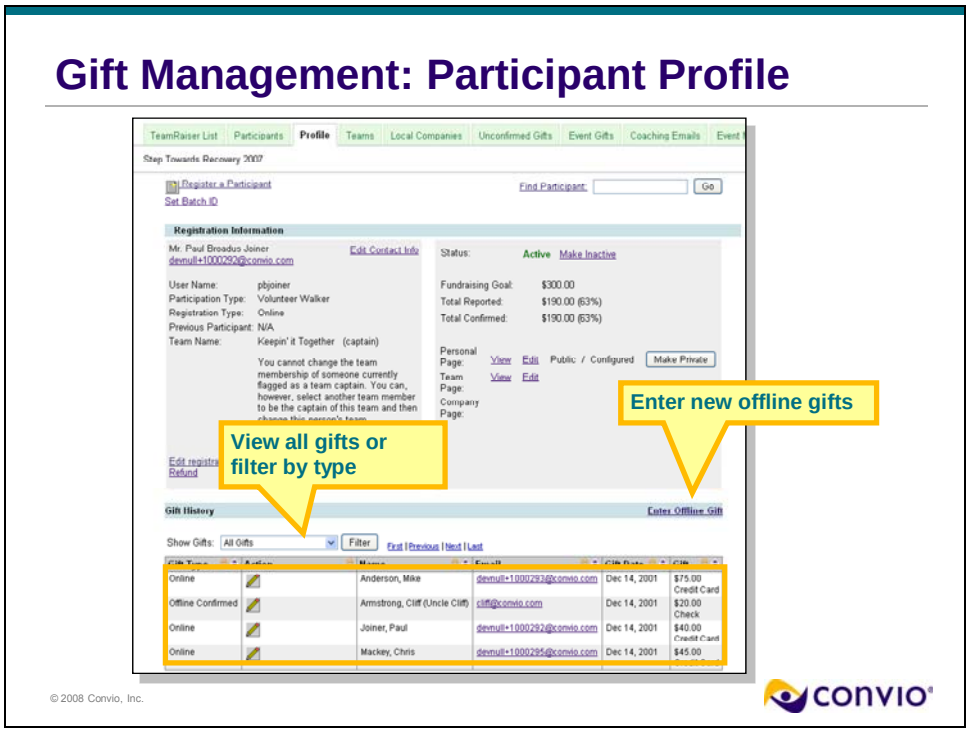
Viewing the Team Details

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

Viewing the Team Members

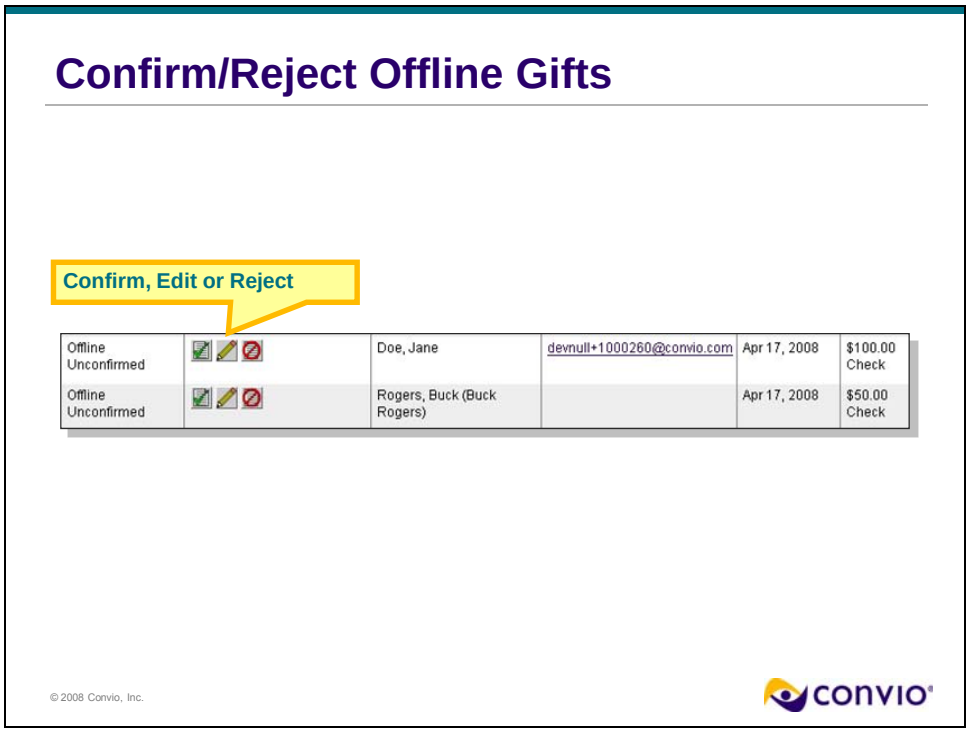
1. Click the ***Members*** tab next to the ***Gifts*** tab

Managing Gifts



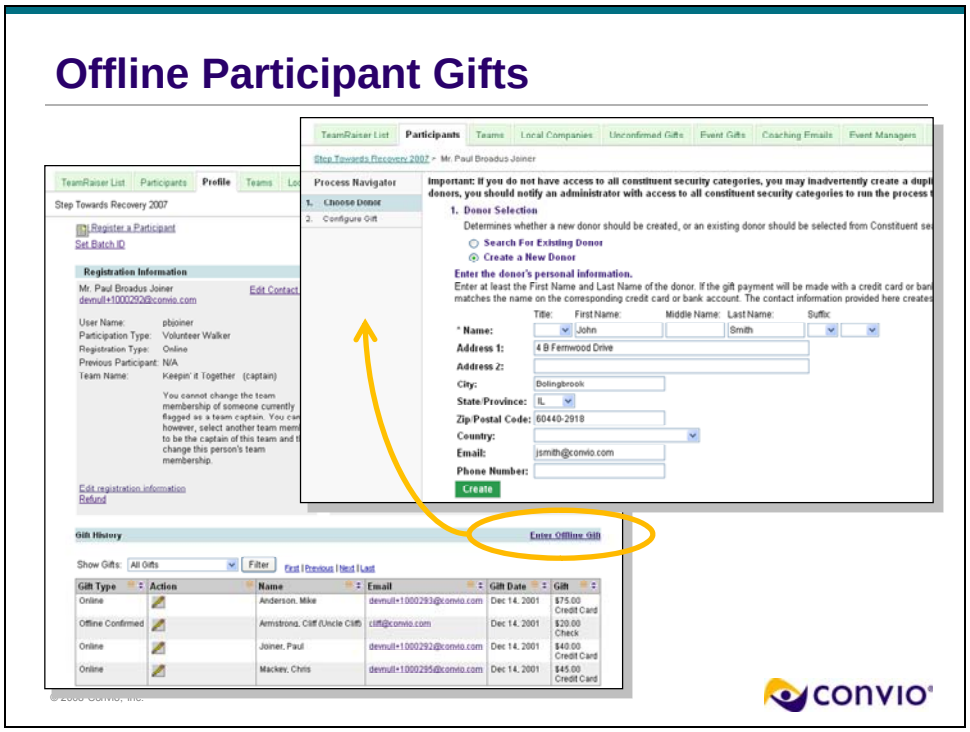
Gift Types:

- An **online gift** is one processed with a donor's credit card on your Convio-powered site
- An **offline gift** is one received by check or cash and entered into the system by a participant or administrator
- A **confirmed gift** is a gift for which you as the administrator have received the actual payment. All online gifts/credit card transactions are automatically confirmed.
- An **unconfirmed gift** is one where the participant has entered the gift but you have not yet confirmed receipt of the payment.

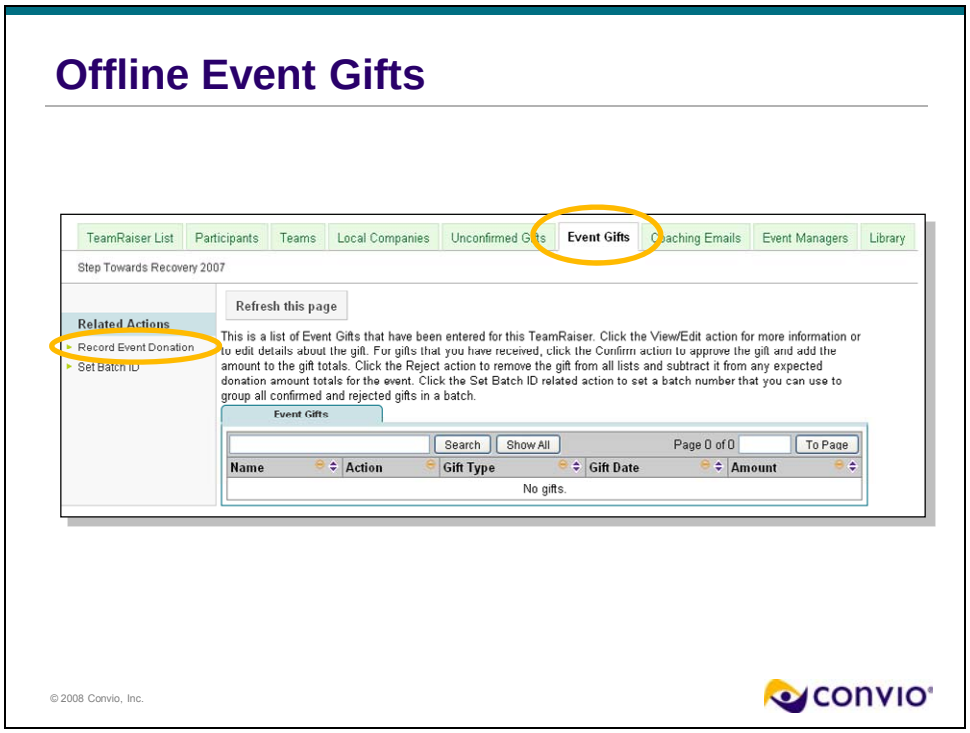


When you receive a check or cash from a participant, you can confirm the gift by click the icon with the green check. You can edit how this gift is displayed by clicking the pencil icon, or you can reject the gift.

Another place to confirm or reject gifts is from the **Unconfirmed Gifts** tab.

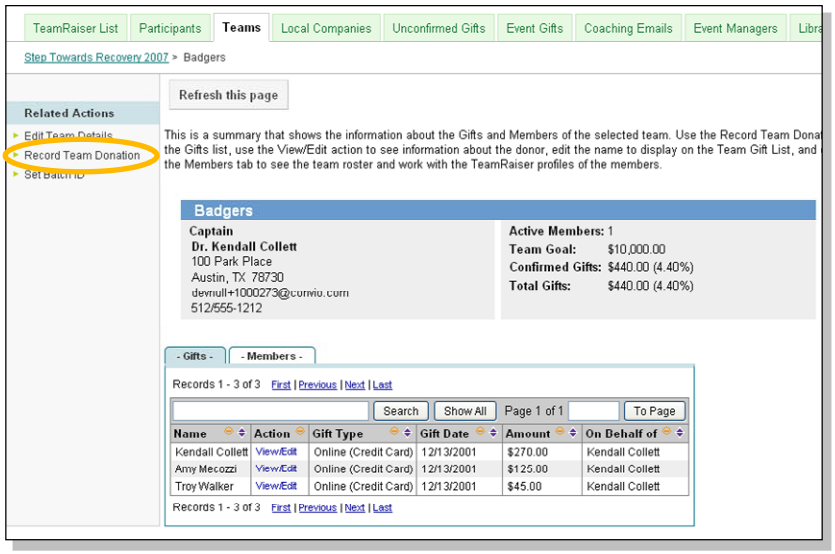


You as the administrator may also add offline gifts to the participants profile by clicking the ***Enter Offline Gifts*** link. Always search for a donor first to see if they already exist in your database before creating a new donor.



Event gifts may be recorded under the **Event Gifts** tab by clicking the ***Record Event Donation*** link under the **Related Actions** column.

Offline Team Gifts



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Team gifts can be recorded by going to the **Teams** tab, searching for the team, then clicking ***Record Team Donation***.

Gift Management: Transaction Management

- Administrators with Transaction Management permissions can perform adjustments to monetary transactions
  - Some changes are irrevocable, such as the issuing of refunds
  - Ensure proper training regarding the software tools and your organization's business processes

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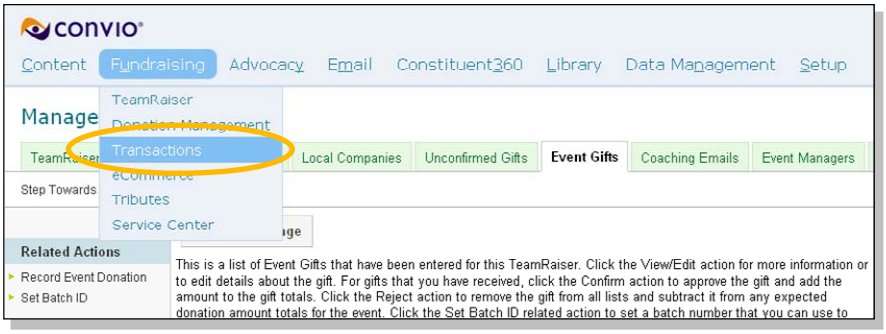
Transaction Management

- Easily search all transactions for donations made by, or on behalf of, any participant



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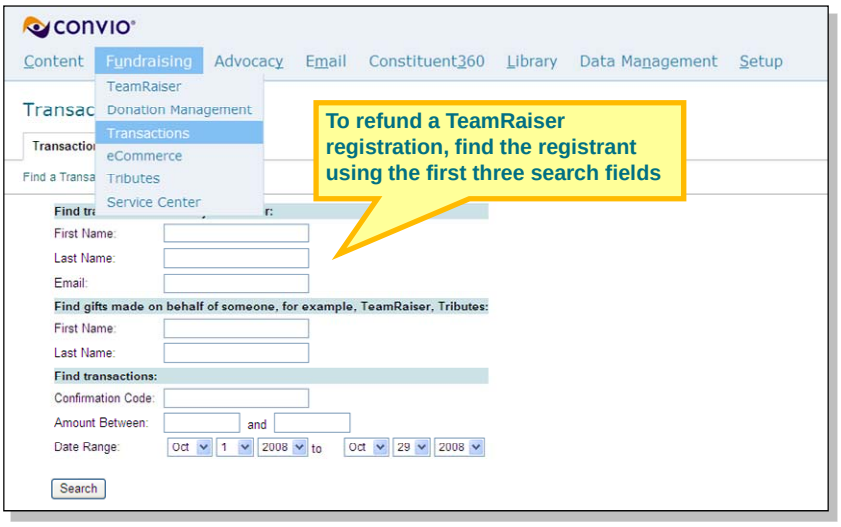
Another place to find donation transactions is by clicking the ***Transactions*** link under the **Fundraising** drop-down menu.

TeamRaiser Registration Refunds



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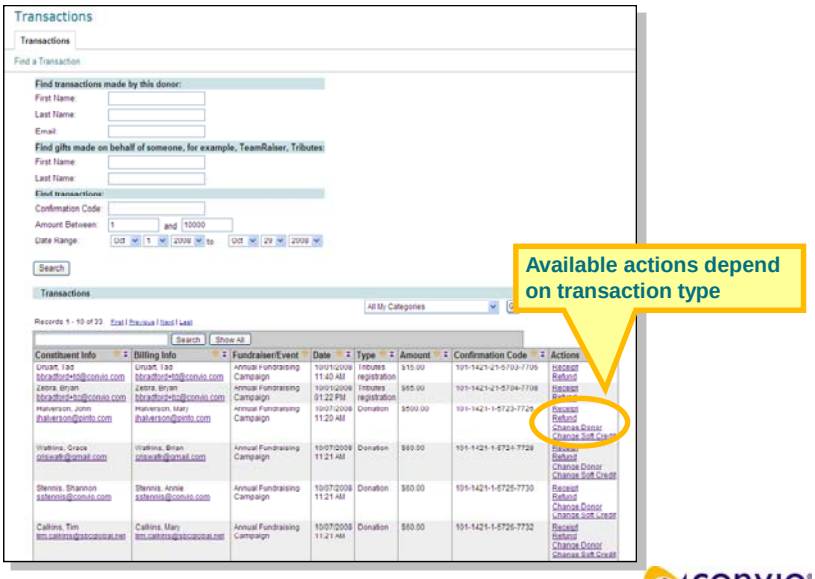
Anytime you are managing registration transactions, you'll want to use the first three fields in the Transaction finder, searching by the donor.

Transaction Management



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A list of transactions that meet your search criteria will be displayed beneath the search fields. A list of available actions appears in the **Actions** column. The available actions depend on the transaction type.

Transaction Management

- Standard Transaction Management actions available for gifts:
  - Process/Record Refunds of Gifts
  - Edit/Delete Offline Donations
  - Change Donor
- TeamRaiser-specific actions are covered in the following slides

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TeamRaiser Registration Refunds

- TeamRaiser registration refunds can involve several complicated cases:
  - A registration fee may be waived after the fact, with the participant still attending/fundraising
  - A registrant may back out of participating, and want their registration fee refunded
  - A registrant may back out of participating, but tell the organization to keep their fee as a donation
  - If the registrant was part of a team, or even the captain of a team, the team may be impacted as well

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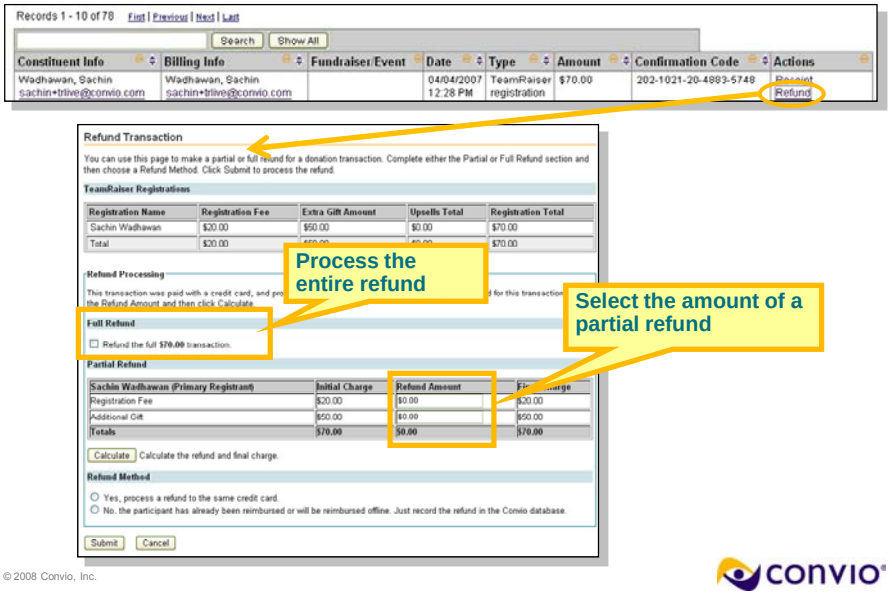
TeamRaiser Registration Refunds



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In this example, we click ***Refund***, select ***Yes*** to process the refund under **Credit Card Processing,** and select ***No*** to keep the registrant's participation active under **Registration Processing**. This individual will still be able to fundraise and participate as usual.

TeamRaiser Registration Refunds

- There are special considerations for Team Captain refunds:
  - If the registrant was the only member of a team and won't participate, the team is deleted
  - As before, another team member or co-captain must be promoted before the former captain's registration can be removed and refunded

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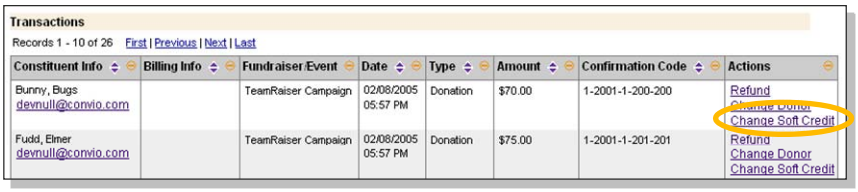
Changing Soft Credit

Changing Soft Credit: TeamRaiser Donations

- If a gift has been given on behalf of one participant, it can easily be credited to a different participant.
  - Soft Credit – when a donation is made to a participant's personal page, that donation has a soft credit towards the participant



Transactions

Records 1 - 10 of 26 First | Previous | Next | Last

Constituent Info	Billing Info	Fundraiser/Event	Date	Type	Amount	Confirmation Code	Actions
Bunny, Bugs devnull@convio.com		TeamRaiser Campaign	02/08/2005 05:57 PM	Donation	$70.00	1-2001-1-200-200	Refund Change Donor Change Soft Credit
Fudd, Elmer devnull@convio.com		TeamRaiser Campaign	02/08/2005 05:57 PM	Donation	$75.00	1-2001-1-201-201	Refund Change Donor Change Soft Credit

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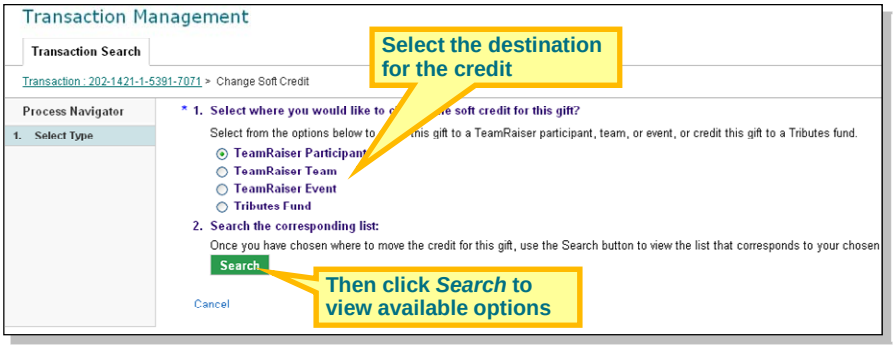
Sometimes donors will accidentally make a donation to the wrong participant. The intended participant or donor will notice that the donation does not appear in the scrolling donor list for that participant, and will contact your organization. The donation can easily be reassigned to the correct participant by finding the transaction, and selecting the ***Change Soft Credit*** link. Another scenario involves donors making a gift to a team, intending it for an individual.

Changing Soft Credit



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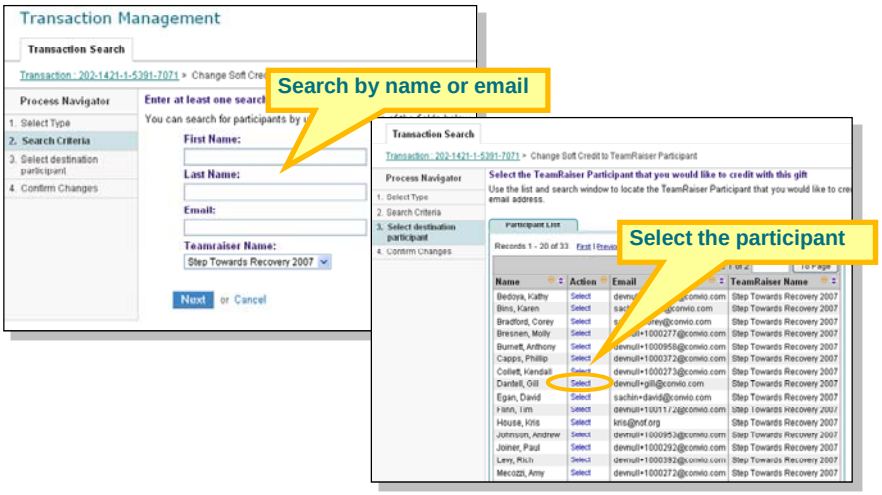
Once you click the ***Change Soft Credit*** link, you must select the desired option and click ***Search***.

Changing Soft Credit to a Participant



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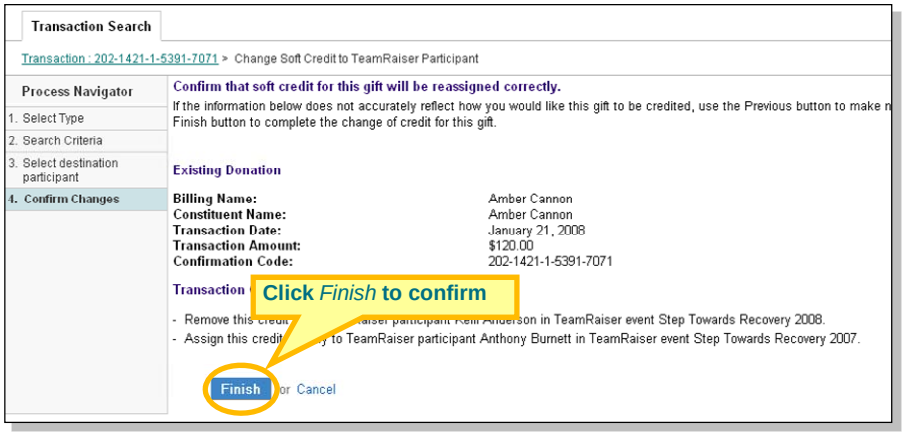
Perform a search and select the participant from the list.

Changing Soft Credit to a Participant



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Confirm the information is correct and click ***Finish***.

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: _____

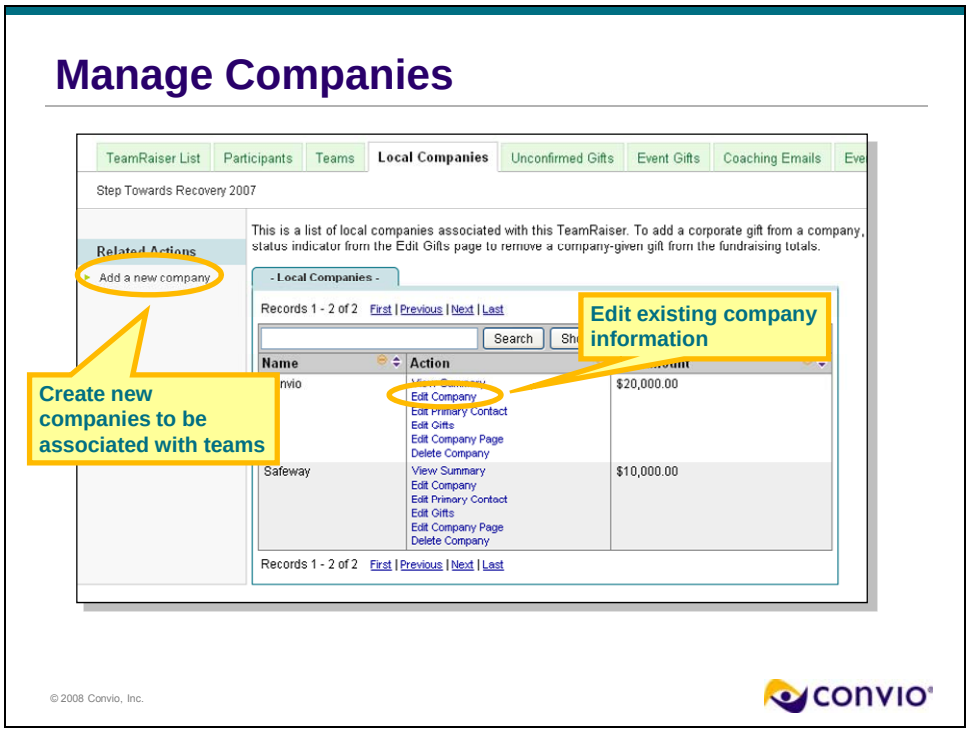
Enter an Offline Team Gift

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

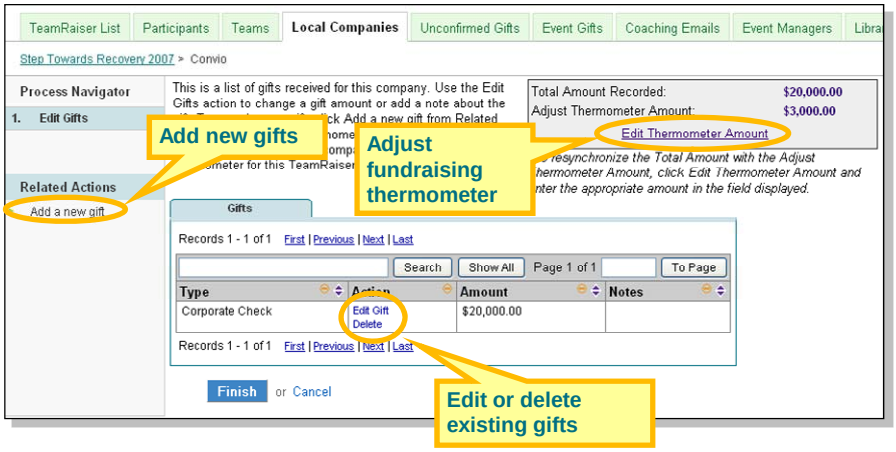
1. From the **Fundraising** drop-down menu, select ***Transactions***
2. Using any of the first three search fields, search for the donor listed above
3. Click ***Change Soft Credit*** in the **Actions** column next to the correct transaction
4. Make sure ***TeamRaiser Participant*** is selected and 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***

Managing Companies



Companies that can be associated with teams can be found under the **Local Companies** tab. When participants create a team during registration, they can choose from a list of local companies that will populate from this tab. They also have the opportunity to enter a new company to which their team will be associated. New companies entered will also appear under this tab.

Manage Companies



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Gifts from these companies can also be entered. However, please note that gifts entered here *do not* show up as transactions but will affect the donation thermometer if you do not adjust it using the ***Edit Thermometer Amount*** link. Doing this will make your reporting appear to be off. As a best practice, only enter event gifts under the **Event Gifts** tab as these will show up as searchable transactions.

Manage Companies

- **Company Coordinator**
  - A Team Captain of a team which is associated with any company, can be designated as the Company Coordinator for all teams associated with that company
  - Company Coordinator will have the ability to edit a Company Page which is accessible from their Participant Center. The Company Page contains links to all of the Teams which are associated with that company

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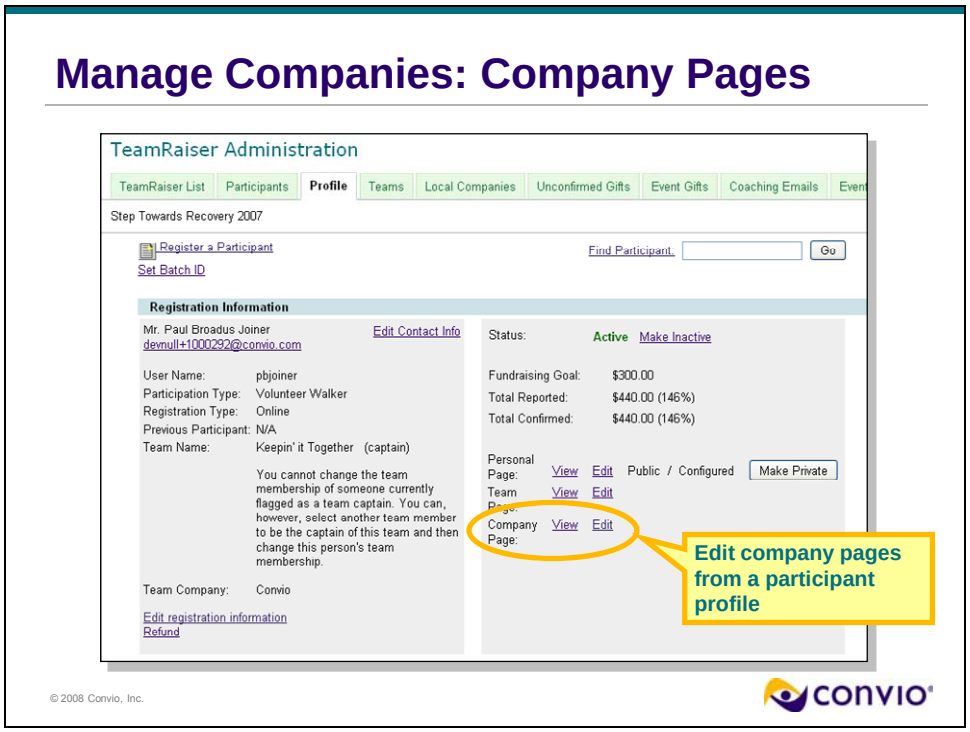

You can view or edit a Company Page from the participant's **Registration Information** page.

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***

Coaching Emails

Ongoing Event Support

- Use the Participant Center Home Page as a place to post new information for your participants
- Send Coaching Emails to your participants to communicate with them about ways they can improve their fundraising

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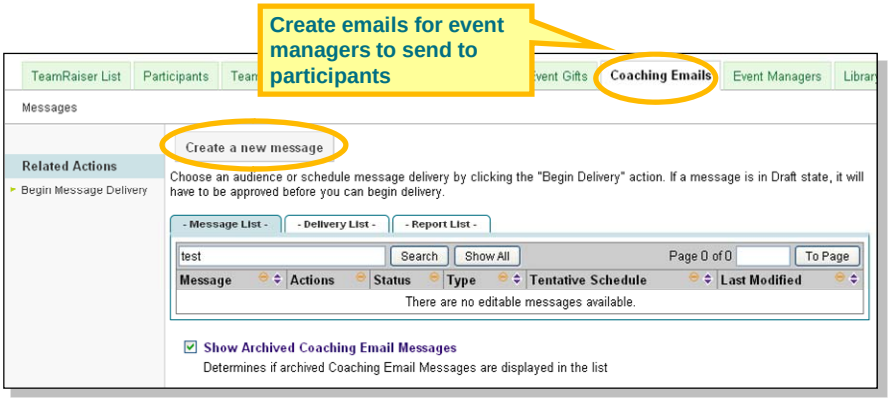
You can use coaching emails as a way to communicate with your participants from with the TeamRaiser application. Coaching Emails can be used to suggest creative ways to fundraise, notify participants of changes to the event schedule, etc.

Coaching Emails



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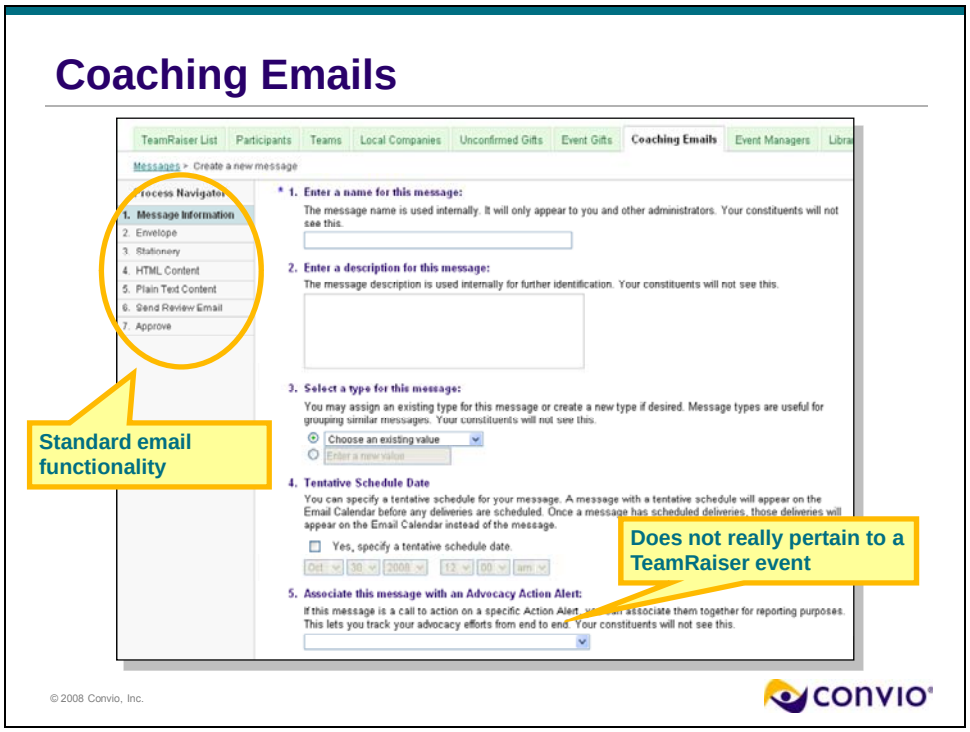
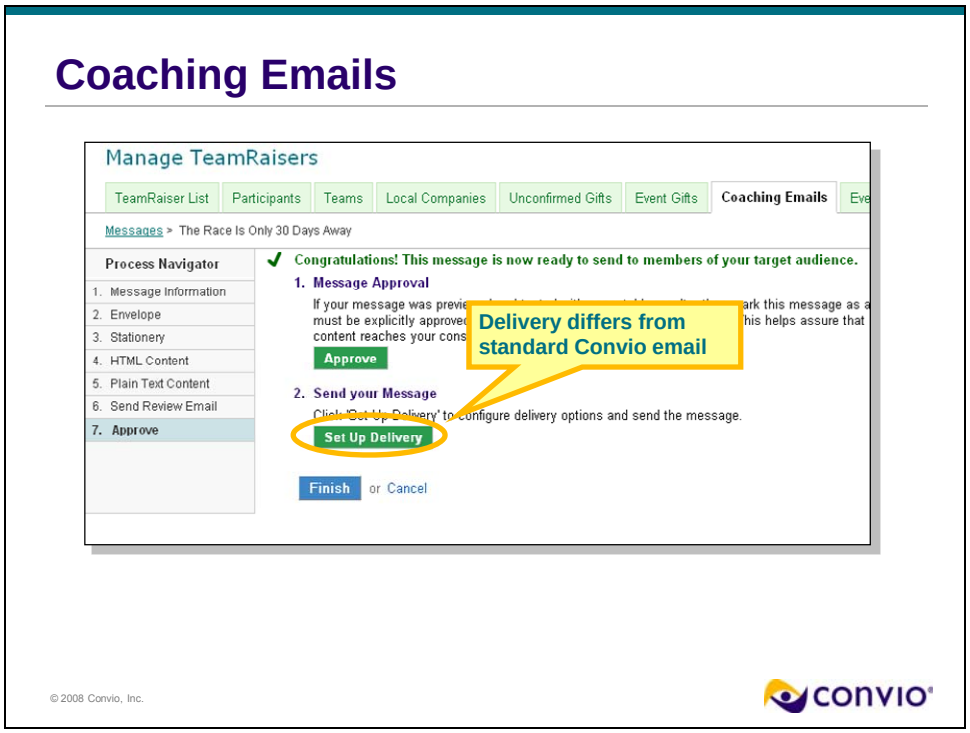
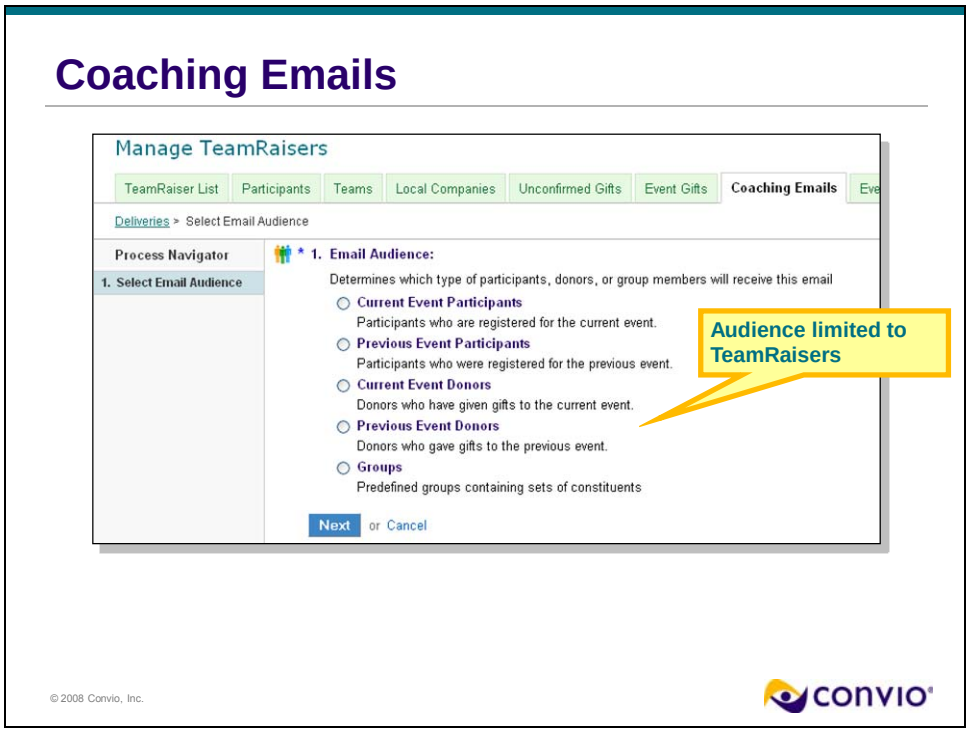
From the **Coaching Emails** tab, select the ***Create a new message*** button.



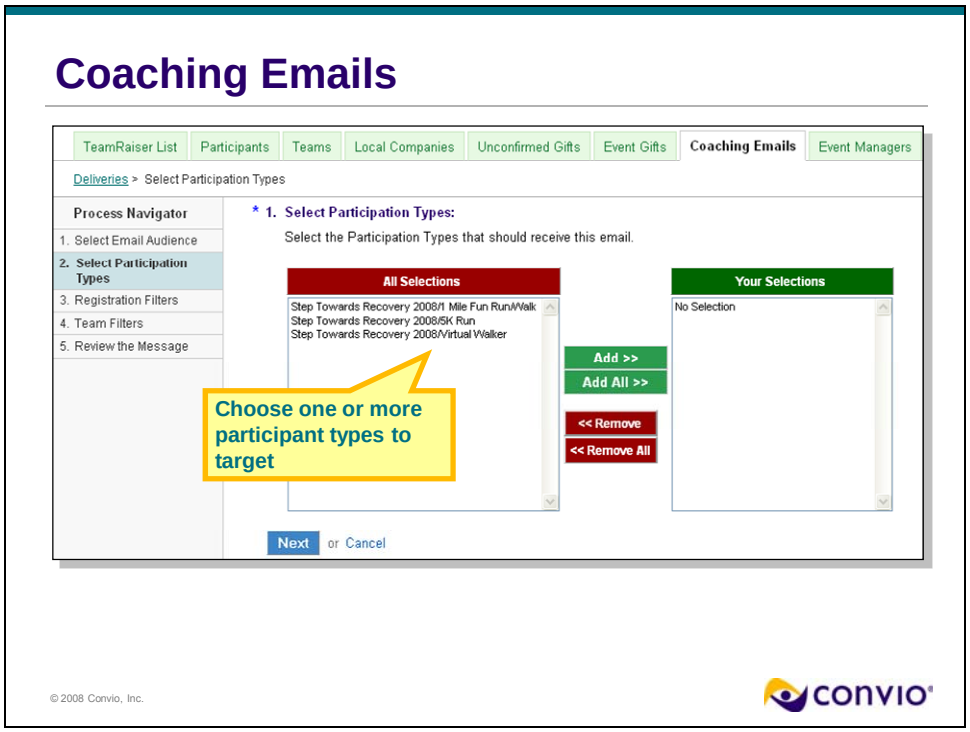
The **Process Navigator** lists out all of the steps that need to be completed to create an email message. The first step is to provide some basic email message information.



Continue through the steps as you would a regular email. You'll need to approve the message to verify that it is ready to be sent and click the ***Set Up Delivery*** button.

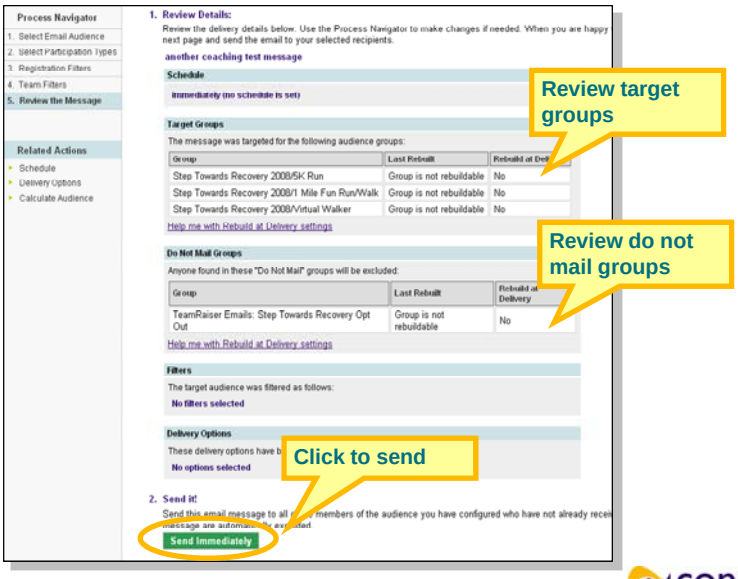


The email audience is limited only to this TeamRaiser or the previous year's event.



Groups were automatically created behind the scenes when you configured your TeamRaiser event. Those groups will be available to include on the target list for this event.

Coaching Emails



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Continue through set-up process until email has been configured then click ***Send***.

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

TeamRaiser Reports

TeamRaiser Reports Classic

TeamRaiser reports can be accessed through Reports Classic or Report Writer by clicking on ***Data Management*** in the top-level navigation menu, and selecting ***Reports.***

Other Participant Reports

Participant Performance Report

- Registration data
- Track the fundraising performance of each participant (dollars, % of goal); prepare prizes
- Usage of fundraising tools (updates to personal page, emails sent from participant center)
- Use report to identify trendsetters – solicit their stories

Event Check-in Report

- Useful for tracking and recording final statistics
- Emergency contact information
- Team and participation information
- Fundraising information
- Responses to additional questions

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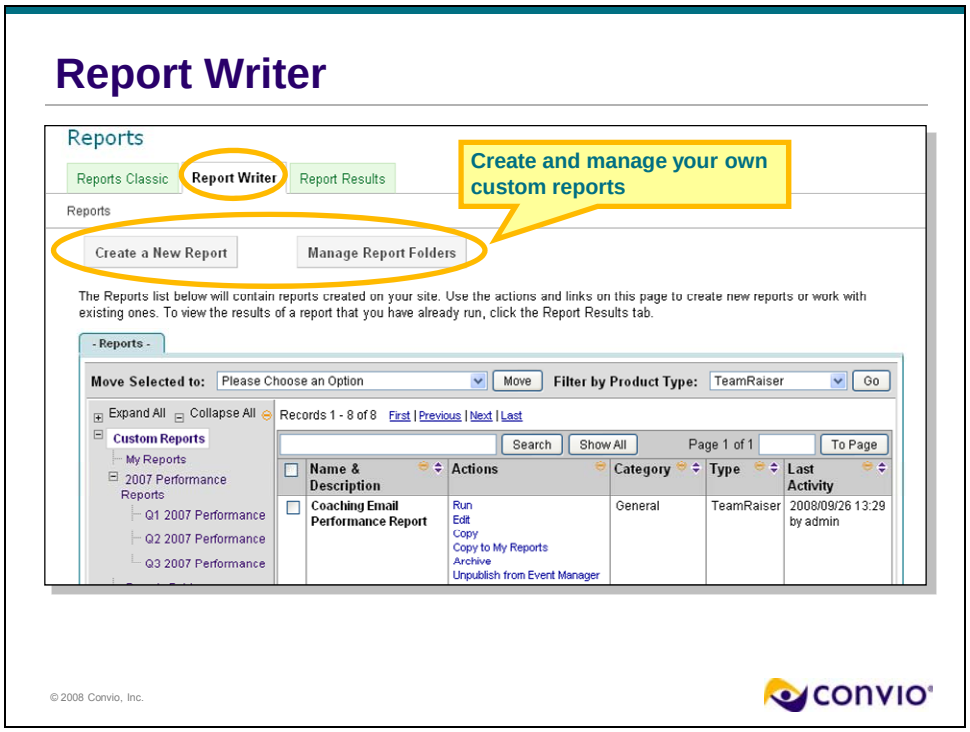

You may also create and save custom TeamRaiser reports in Report Writer.

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

Event Management Center

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Overview

The Event Management Center is a tool for event managers to create and manage their TeamRaiser events online without having to access the Administrator side of a Convio site. The tool is easy to access, easy to use, and allows an Administrator to set various levels of permissions.

Objectives

Objectives

In this section, you will see how to:

- Identify the Event Manager Experience
- As a Site Administrator
  - Set Up Event
  - Create Look and Feel of EMC
  - Create Roles
  - Assign Roles
  - Create Reports
- As an Event Manager
  - Edit the Event
  - Publish the Event
  - Manage the Event

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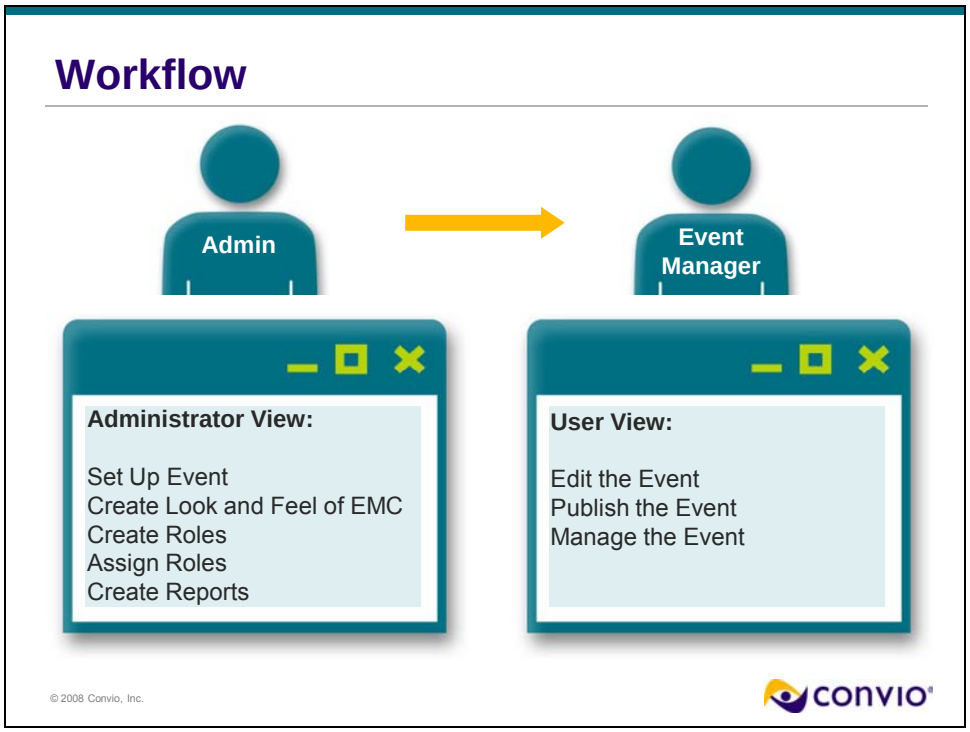
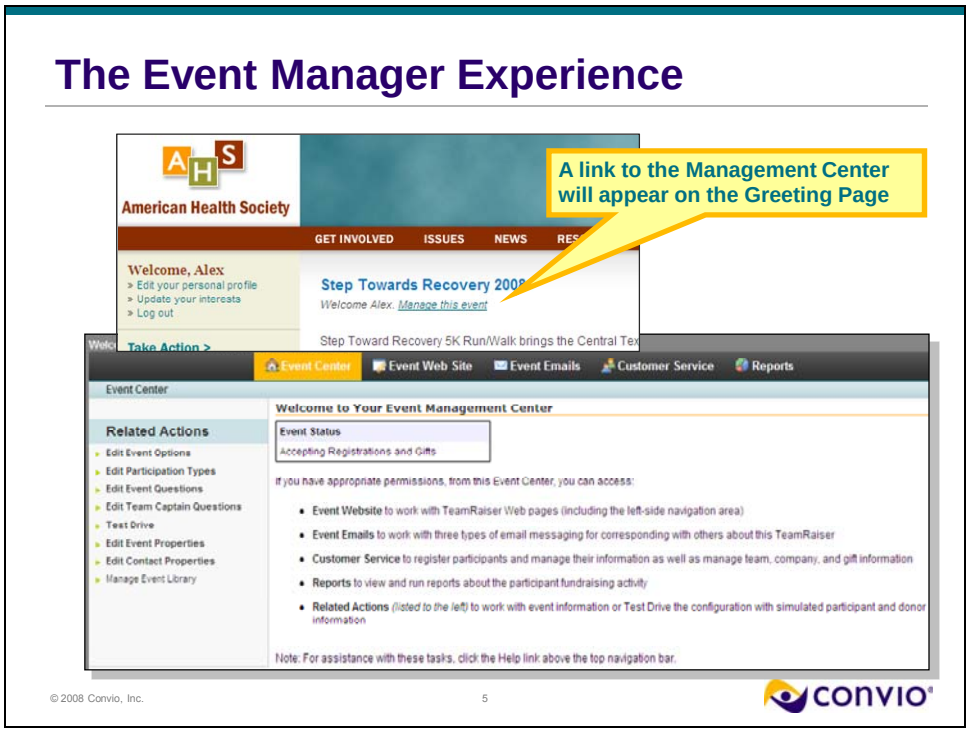
2

Workflow



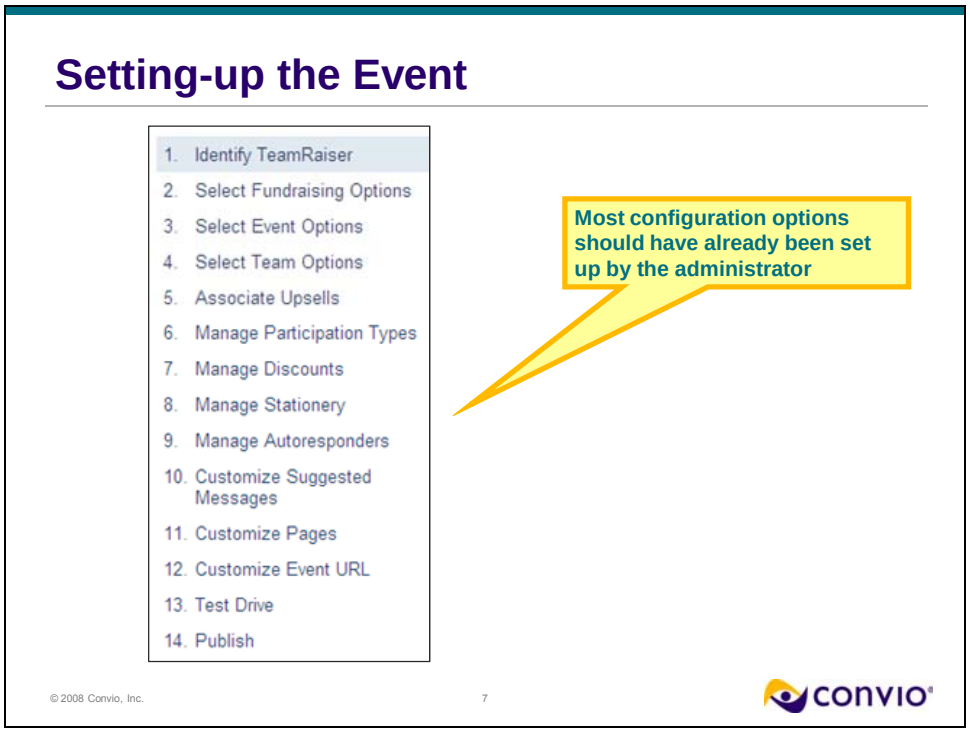
The TeamRaiser event is initially created and configured by the Administrator. The Administrator will also create the look and feel of the Event Management Center, create and assign management roles, and create reports that will be used by Event Managers. The Event Manager can log in to the Event Management Center by clicking on a direct link that the Administrator has sent them, or they can access if from the Greeting Page of that event. If the Event Manager is also a participant in the event, the same login information can be used for both.

The Event Manager Experience



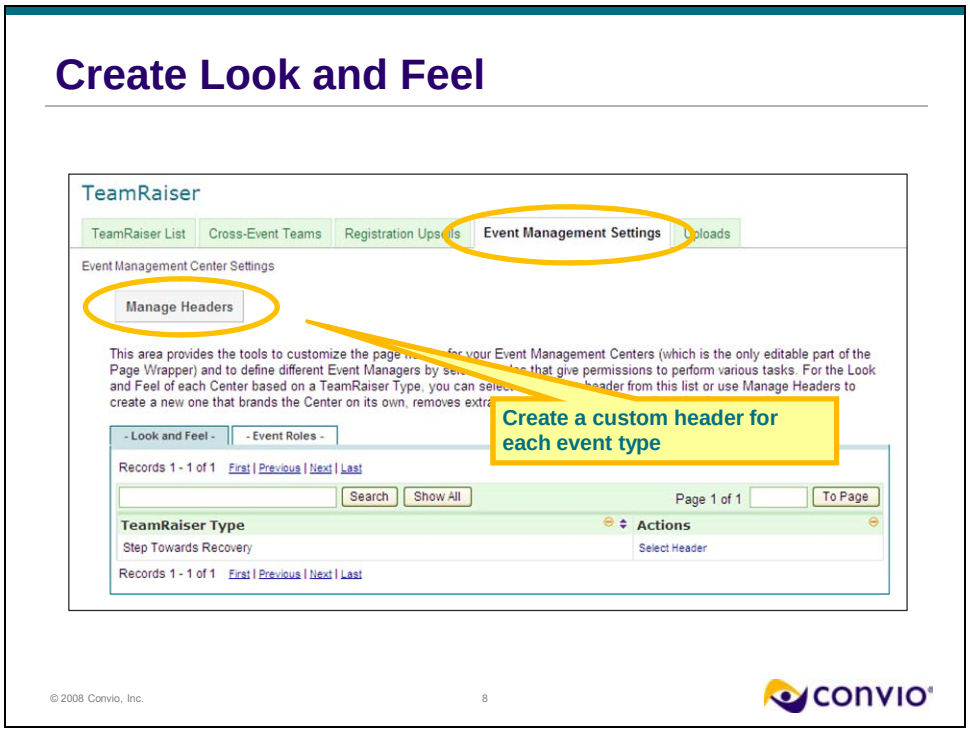
Clicking on the link at the top of the Greeting Page will take the use to the Event Management Center. The user has to be set up as an Event Manager before the link will appear. Once in the center they have access to edit portions of the event, edit the event website, edit and send Coaching Emails, perform event management duties, and run reports that have been provided by the Administrator.

Setting-Up the Event

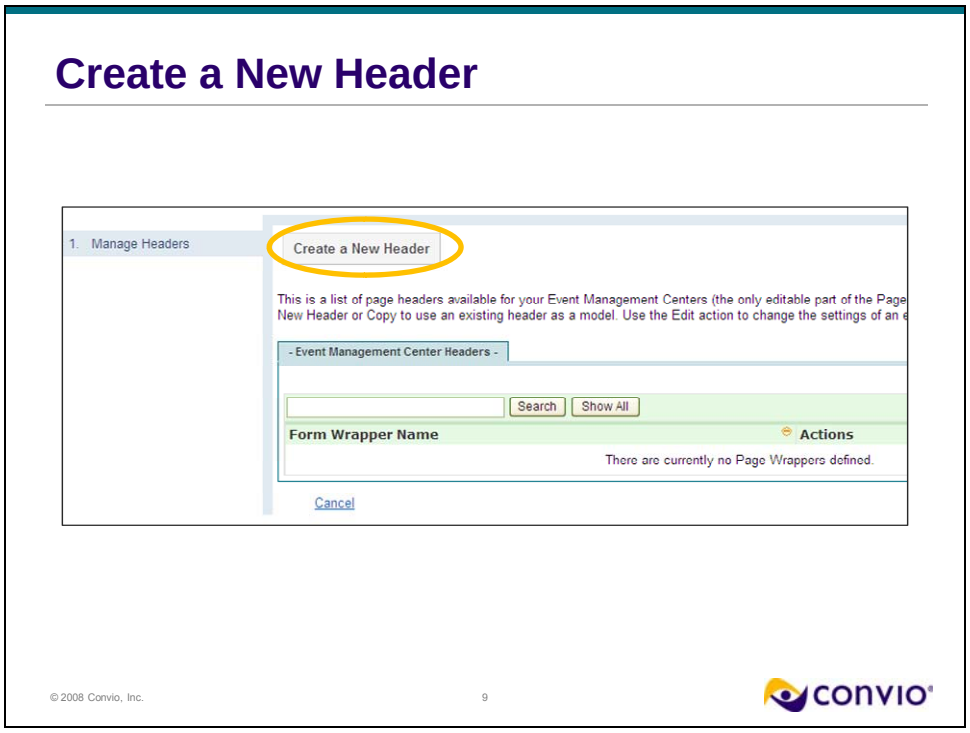


Your event was previously configured during the TeamRaiser Configuration portion of the training and includes identifying the event, setting an event goal, creating Participation Types and creating content.

Creating the Look and Feel

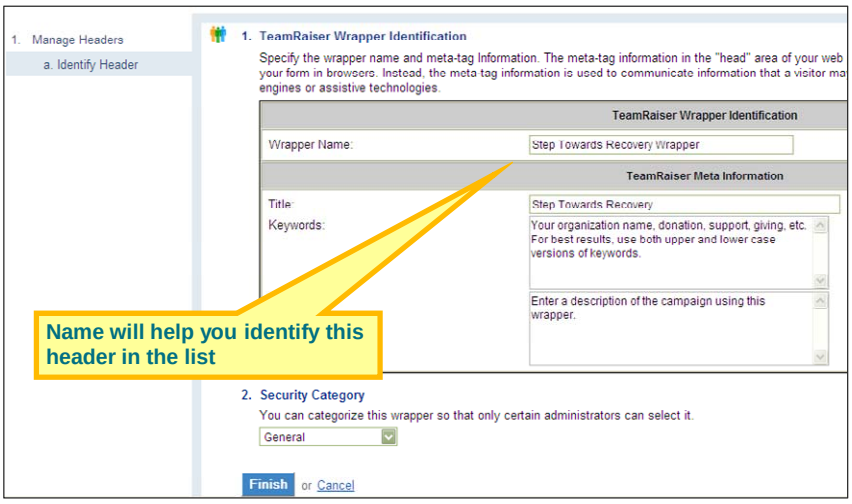


The look and feel of the Event Management Center only involves the header. From the main TeamRaiser page, click the ***Event Management Settings*** tab. To create a new header or to manage one that is already created, click the ***Manage Headers*** button.



Click the ***Create a New Header*** button to begin.

Create a New Header



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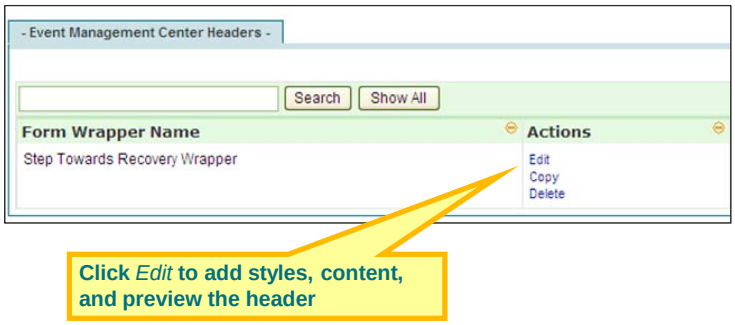
Identify the header by naming it, and setting the Meta information and click ***Finish***.

Editing the Header



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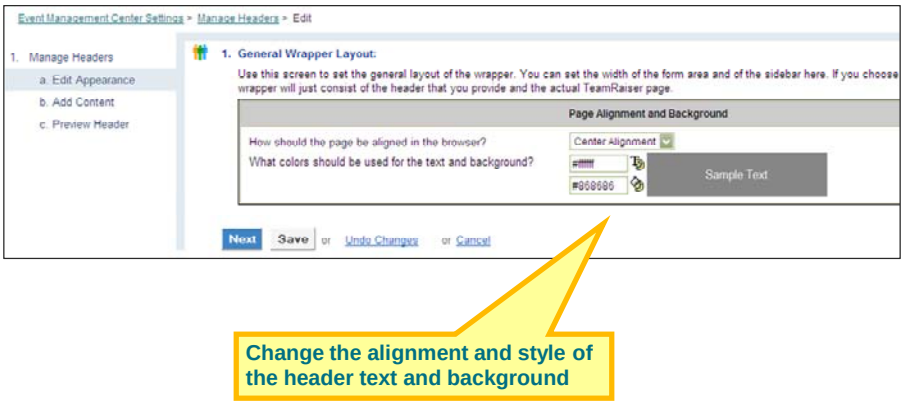
Now that the header has been added, click the ***Edit*** link in the **Actions** column to add the style and content and preview the header.

Editing the Appearance



Change the alignment and style of the header text and background

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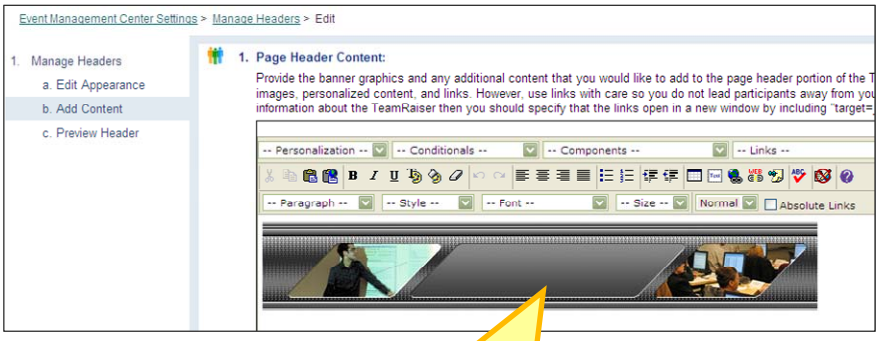
Decide how you would like the page aligned and set the text and background color for the header, then click ***Next***.

Editing the Content



Add a banner image, if desired

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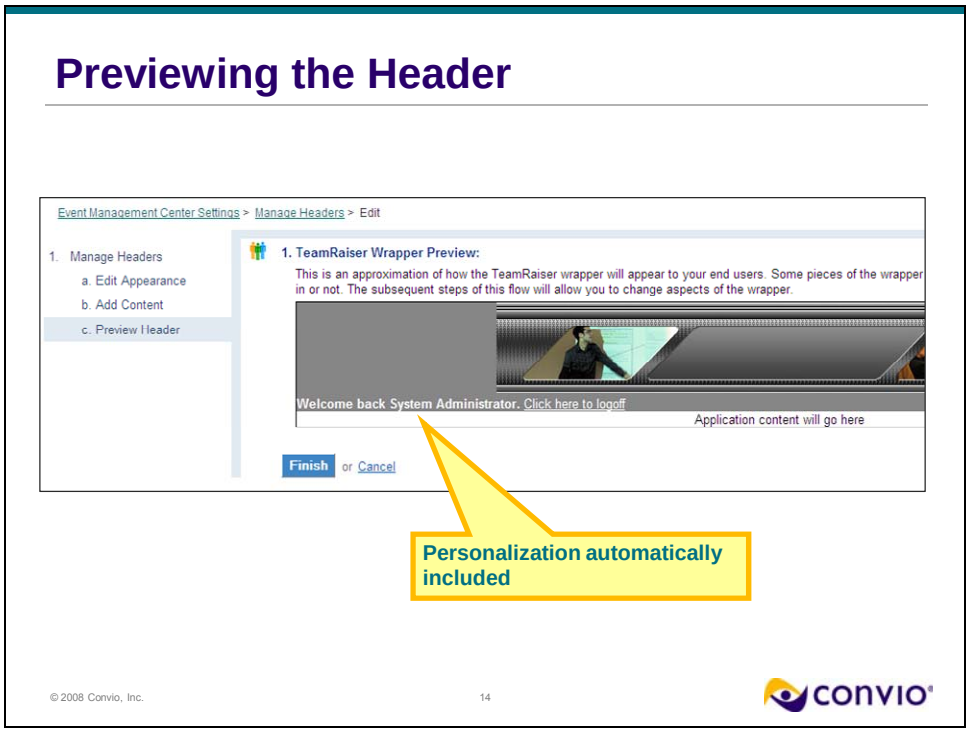
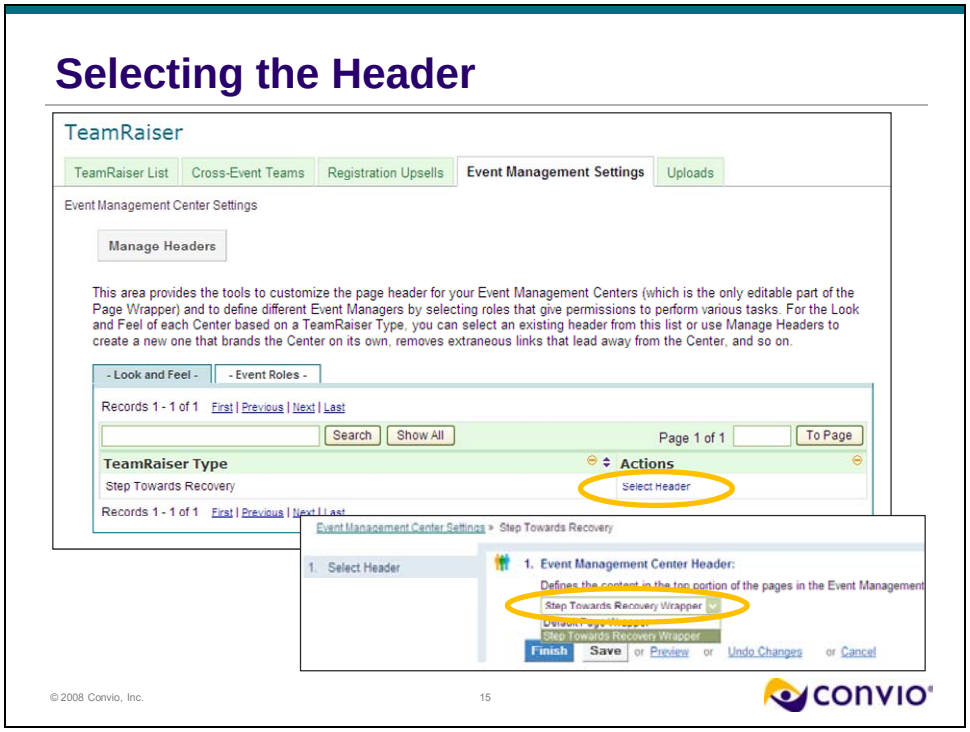
Here, you may add a banner image specific to the event. If you do not want a banner, simply delete it and click ***Next***.



The final step shows a preview of the header. Notice that a personalization was automatically inserted that welcomes the Event Manager.



Now that a header has been created, you need to assign it to a TeamRaiser Type. Click the ***Select Header*** link in the **Actions** column.

EXERCISE 3.1: Creating the Look and Feel

Create a New Header

9. From the main TeamRaiser page, select the ***Event Management Settings*** tab
10. Click the ***Manage Headers*** button
11. Click the ***Create a New Header*** button
12. Name the wrapper (***`Your event's`*** `Wrapper`)
13. Click ***Finish***

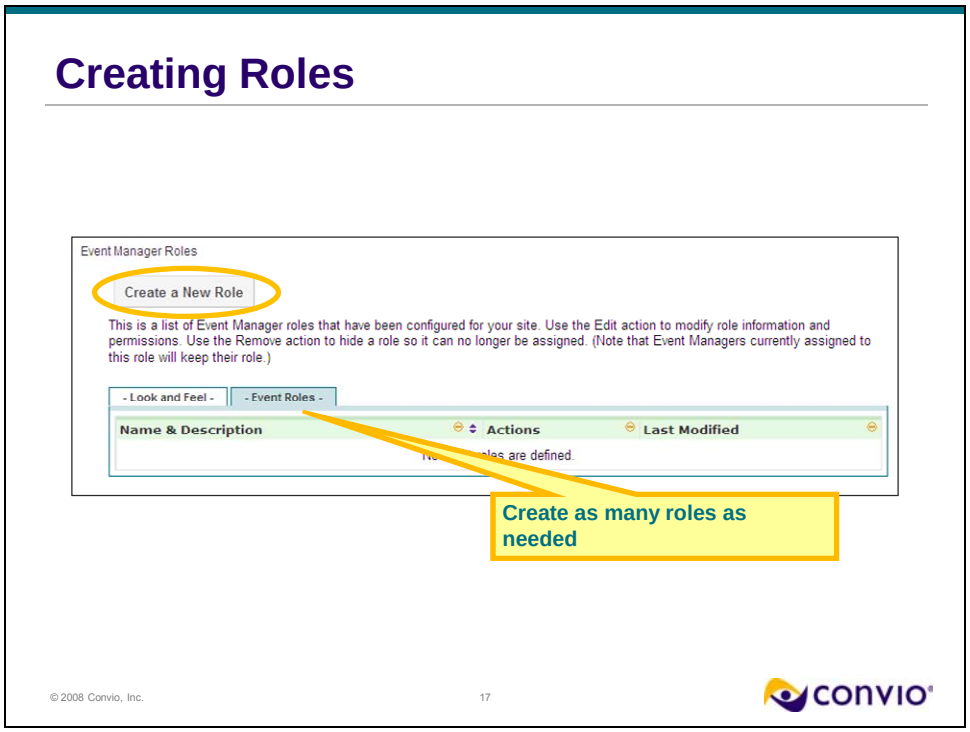
Edit the New Header

1. Click the ***Edit*** link in the **Actions** column next to your header
2. Set your desired alignment and text and background colors
3. Click ***Next***
4. In the WYSIWYG, type your event name, highlight it, and select Heading 1 from the ***Paragraph*** drop-down menu
5. Click ***Next***
6. Click ***Finish***

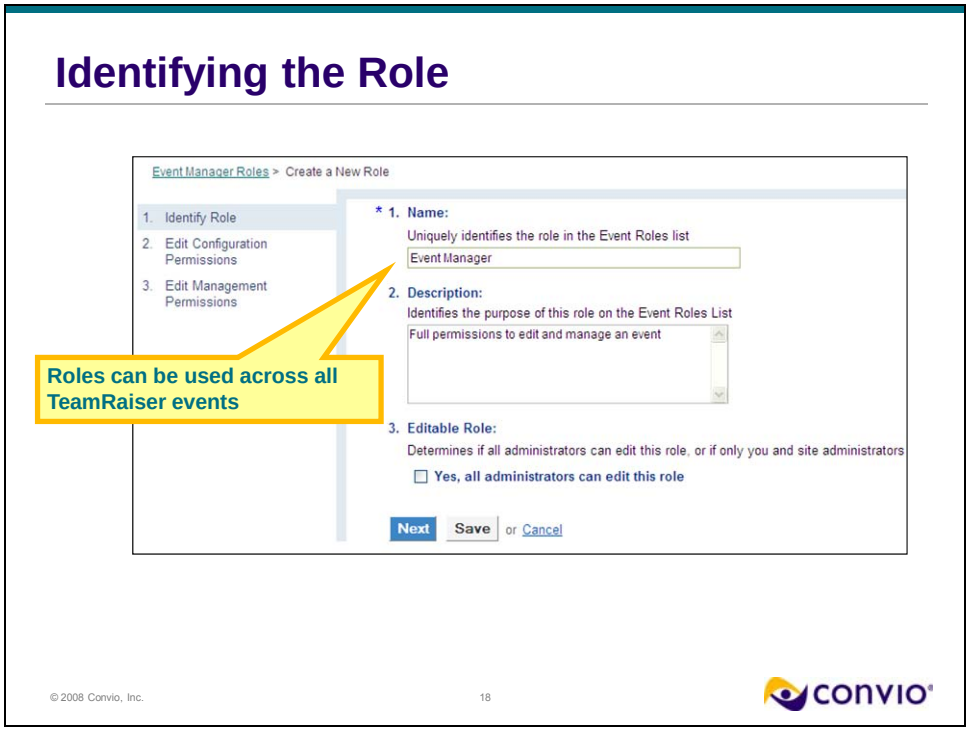
Assign the Header to a TeamRaiser Type

1. Click the ***Event Management Settings*** tab
2. Next to your **TeamRaiser Type**, click the ***Select Header*** link
3. Select your header from the drop-down menu and click ***Finish***

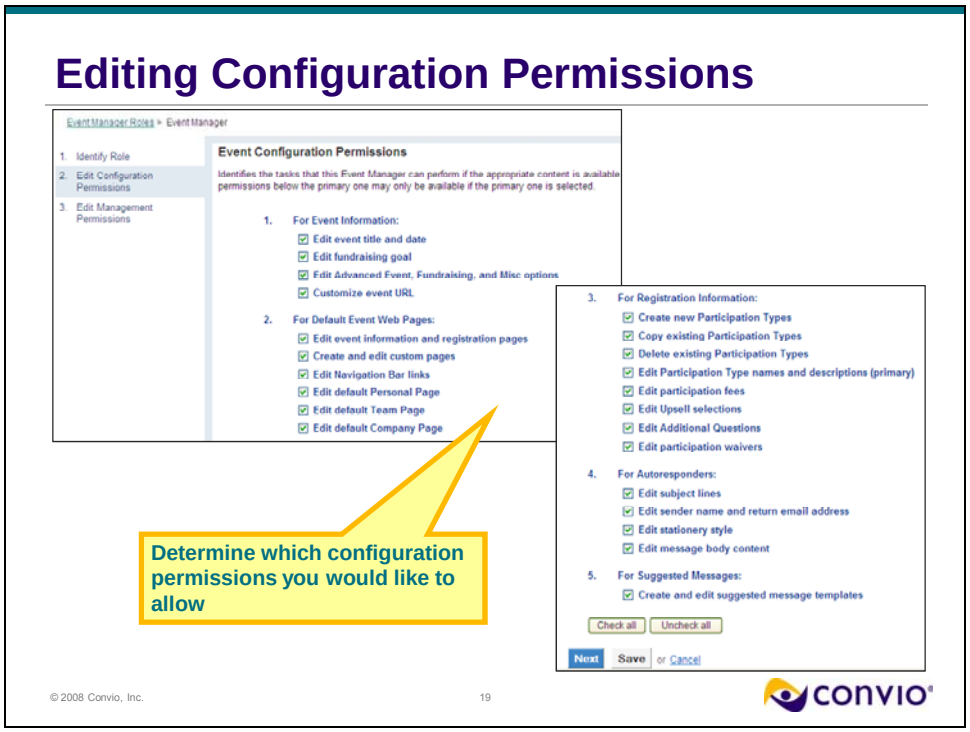
Creating Roles



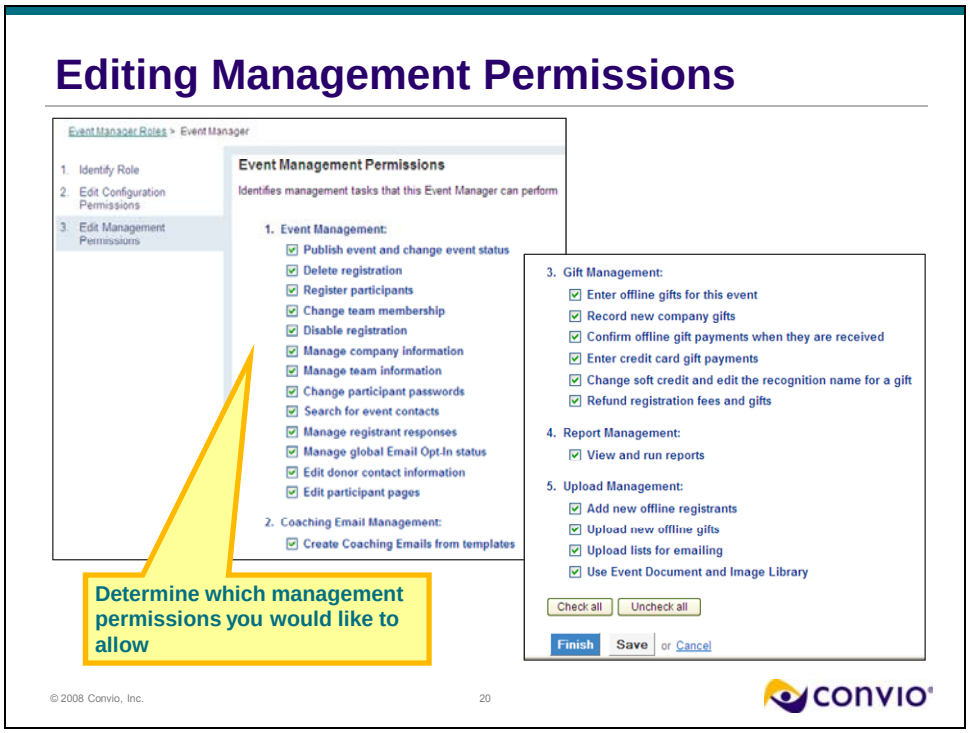
To begin creating a new role, click on the ***Event Roles*** tab next to the **Look and Feel** tab. Then click the ***Create a New Role*** button.



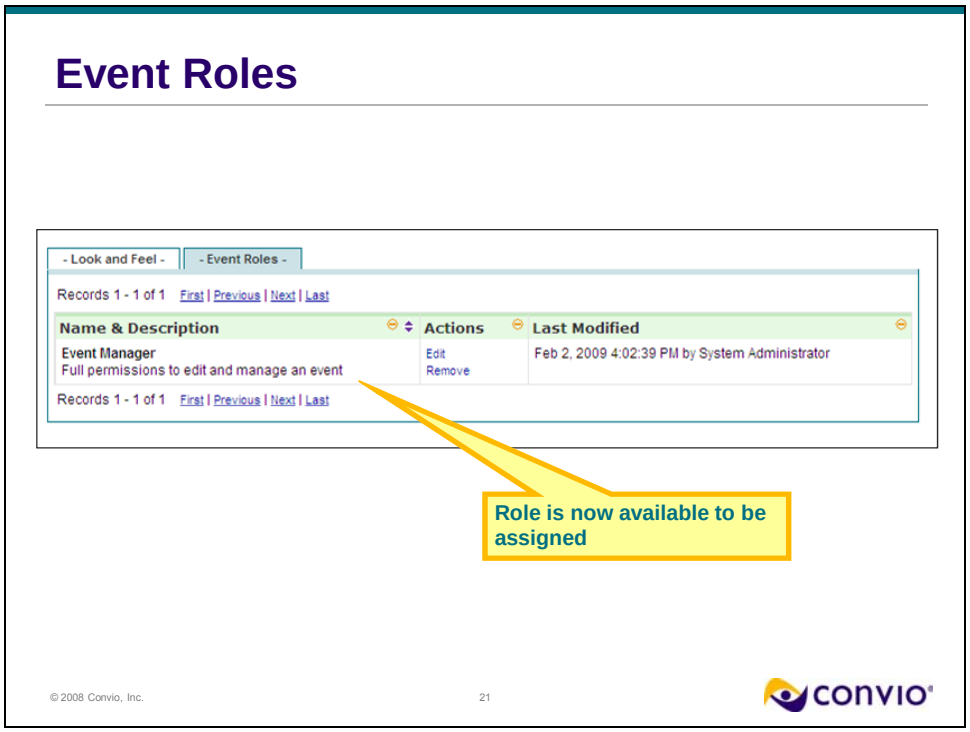
Identify the role and include the general permissions as part of the description.



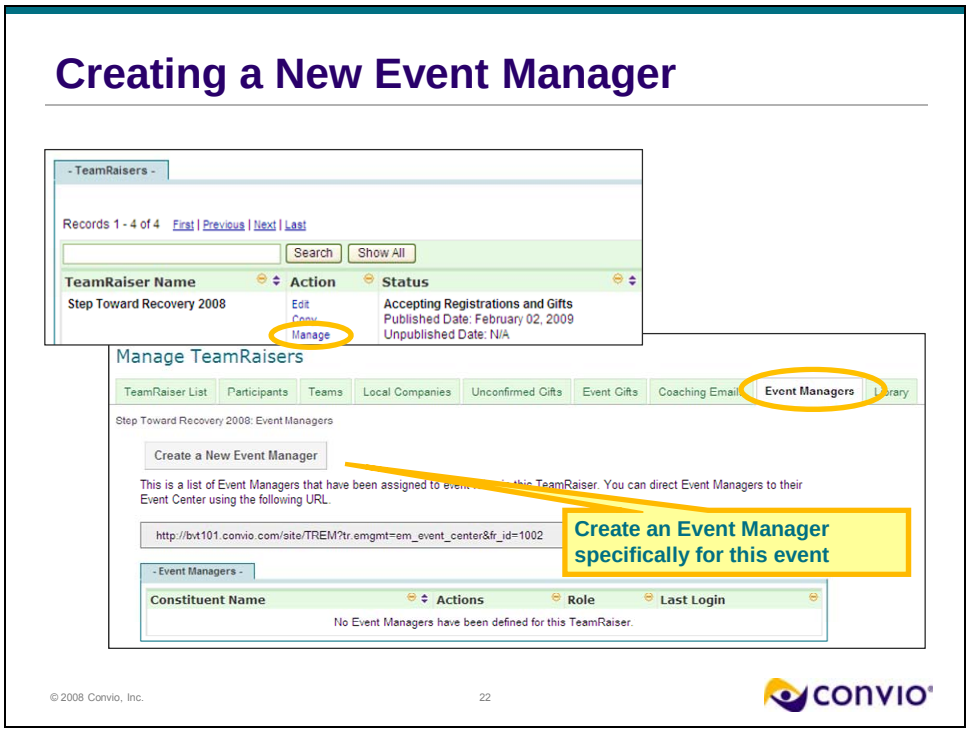
From the list provided, determine which configuration permissions you would like to grant this role. Keep in mind that roles can be customized per event manager.



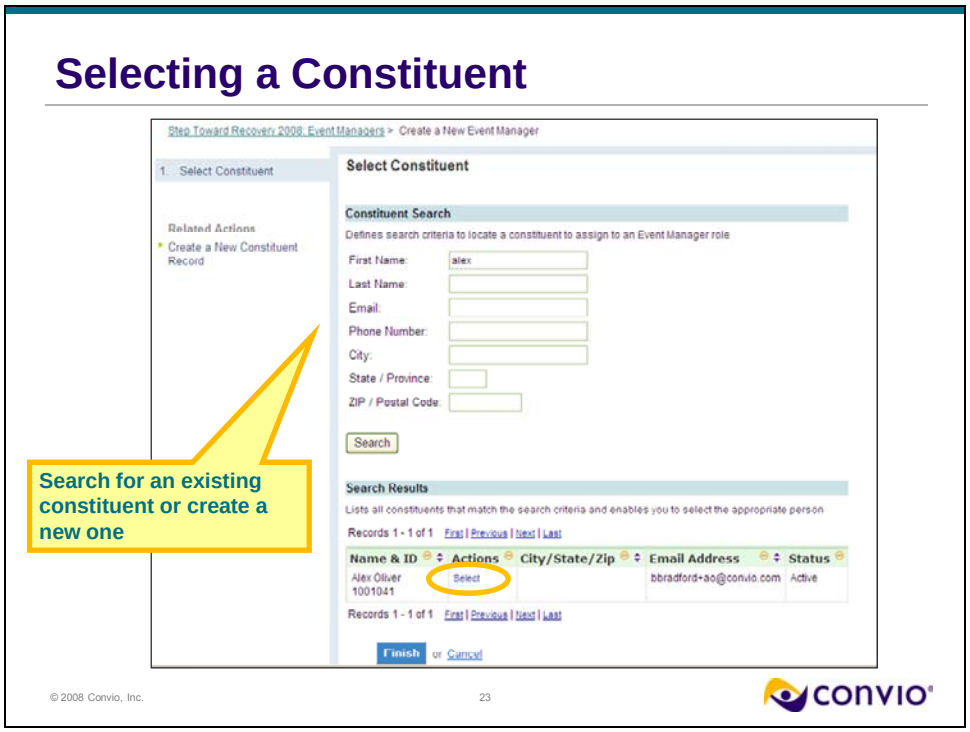
From the list provided, determine which management permissions you would like to grant this role.



Once you have configured a role, it will appear in the **Event Roles** list.

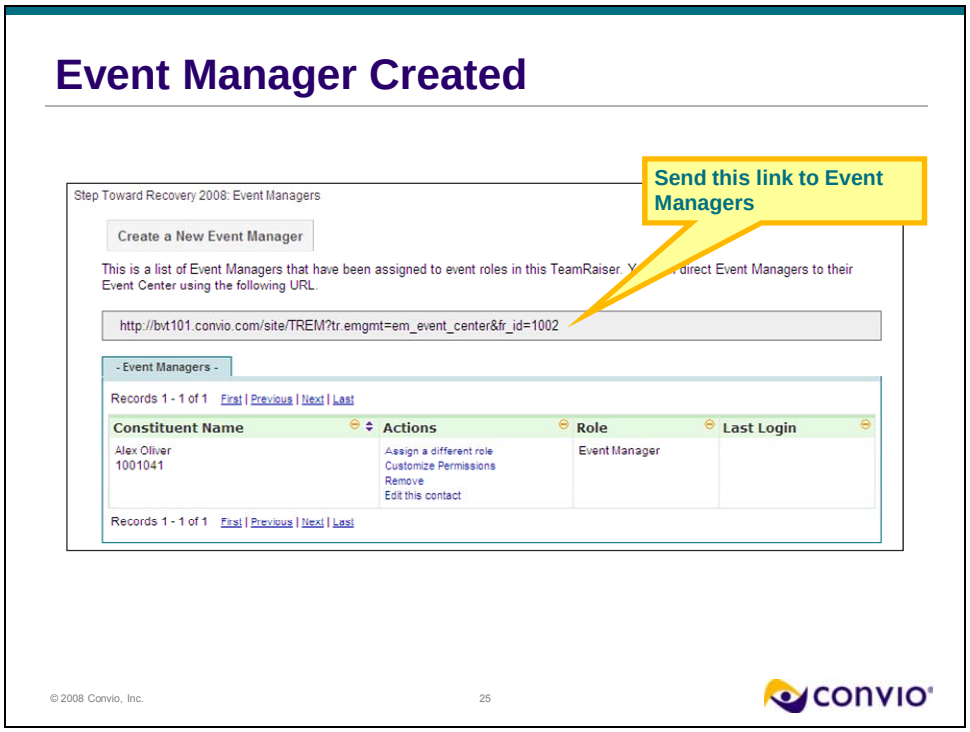


To assign an event manager role to a constituent, you must first navigate back to the main TeamRaiser page and click ***Manage*** next to the desired event. Then click on the ***Event Managers*** tab and select the ***Create a New Event Manager*** button.



You can search for a constituent already in your database, or you may create a new one. Once you have located the constituent, click ***Select*** next to the constituent's name in the **Search Results** column.

A list of all roles you have created will appear. Choose the role for this constituent by clicking the ***Assign*** link. You may also choose to ***Customize Permissions*** specifically for this person. **Note:** Changes to the original role will not affect roles that have already been assigned.



Once a role has been assigned to a constituent, the new event manager will appear in the **Event Managers** list.

EXERCISE 3.2: Creating and Assigning a New Role

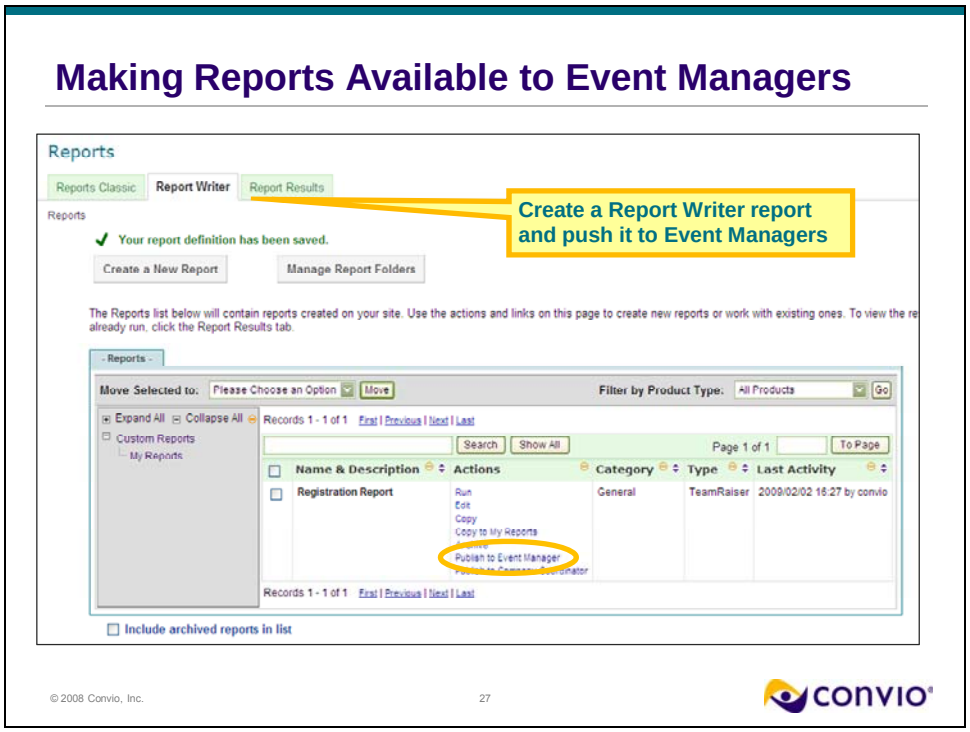
Create a New Event Manager Role

1. From the **Event Management Settings** tab, click the ***Event Roles*** tab
2. Click the ***Create a New Role*** button
3. Type (`Event Manager`) in the **Name** field
4. Type (`Oversees all aspects of the event including event settings, content, and management`) in the **Description** field
5. Click ***Next***
6. Check all boxes and click ***Next***
7. Check all boxes and click ***Finish***

Assigning the New Role to an Existing Constituent

1. Click on the ***TeamRaiser List*** tab
2. Click ***Manage*** next to your event
3. Click the ***Event Managers*** tab
4. Click the ***Create a New Event Manager*** button
5. Search for your name and click the ***Select*** link
6. Click the ***Assign*** link next to the **Event Manager** role

Publishing Reports to Event Managers



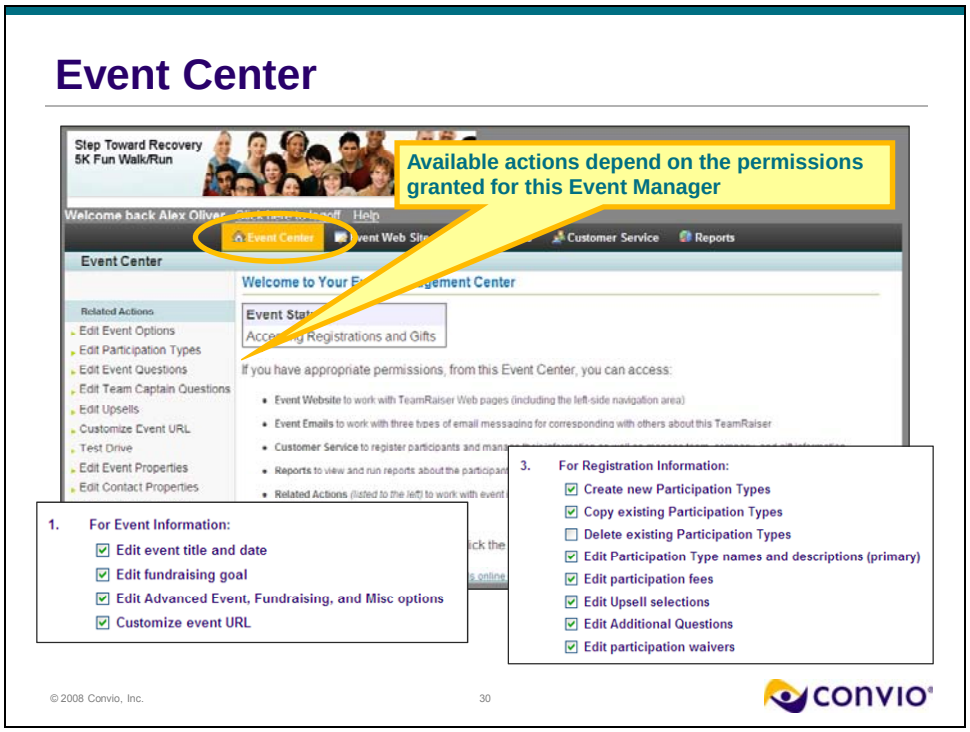
Event Managers do not have the ability to create reports – only to run them. It is your job as the Administrator to create reports and publish them to Event Managers by clicking the ***Publish to Event Manager*** link in the **Actions** column next to a report.

EXERCISE 3.3: Publishing Reports to Event Managers

Publish a Report

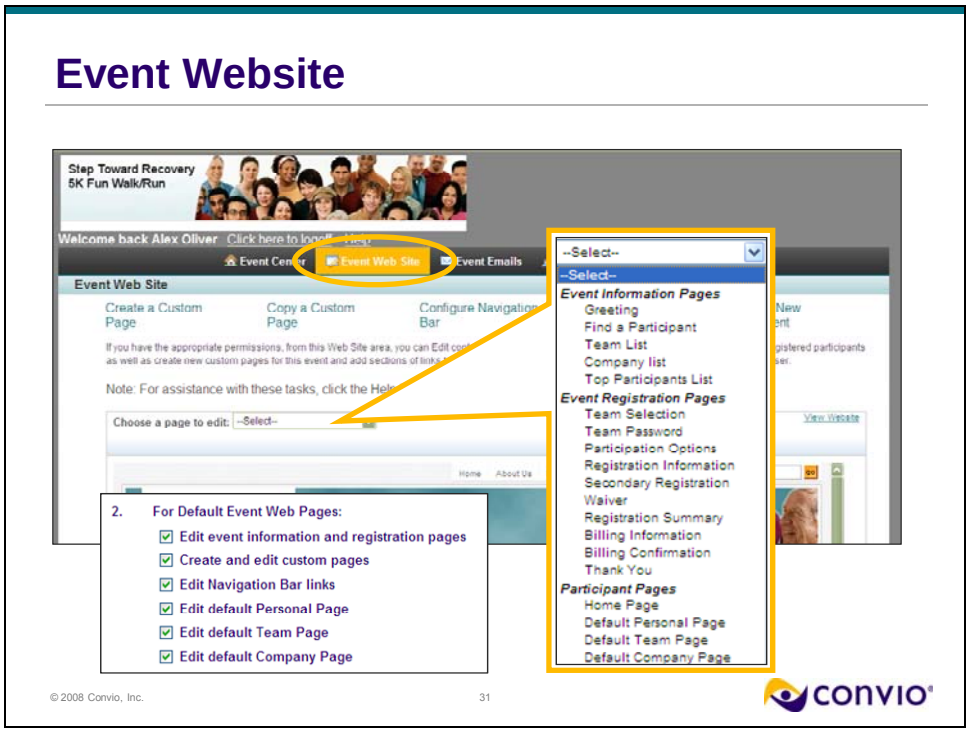
1. From the **Data Management** drop-down menu, select ***Reports***
2. Click the ***Report Writer*** tab
3. Search for the TeamRaiser report your created earlier
4. Click the ***Publish to Event Managers*** link in the **Actions** column

The Event Center

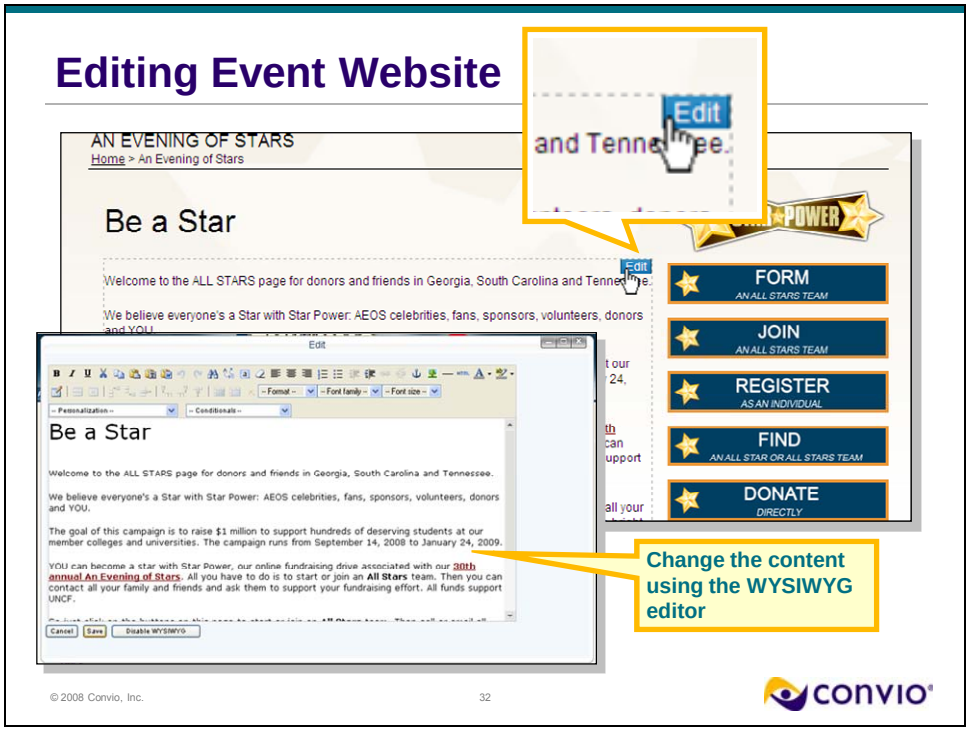


Depending on the permissions you have configured for the Event Manager, some of the following functionality may or may not be available to them. There are five sections to the center which includes the Event Center, Event Web Site, Event Emails, Customer Service and Reports. The Event Center allows the Event Manager to edit configuration options for this event including Participation Types, Event Questions, etc. Again, an Event Manager who has not been granted configuration permissions will not have these options available to them.

The Event Web Site

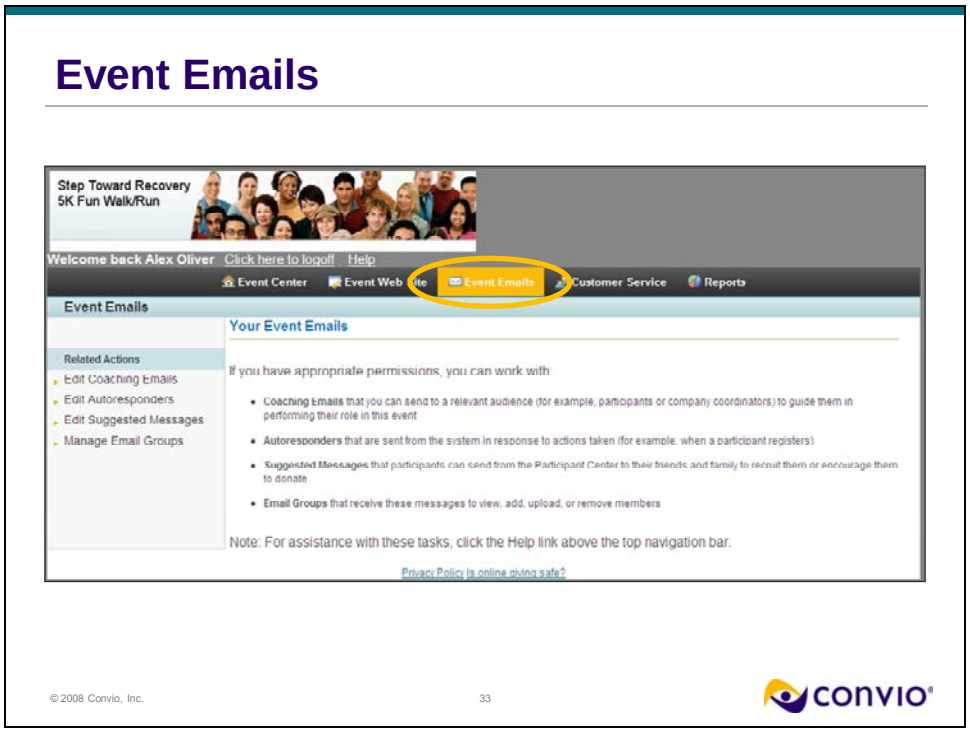


The **Event Web Site** section allows an Event Manager to edit or create new pages based on the granted permissions.



To edit content, simply click the ***Edit*** button in the top right hand corner of a content box.

Event Emails

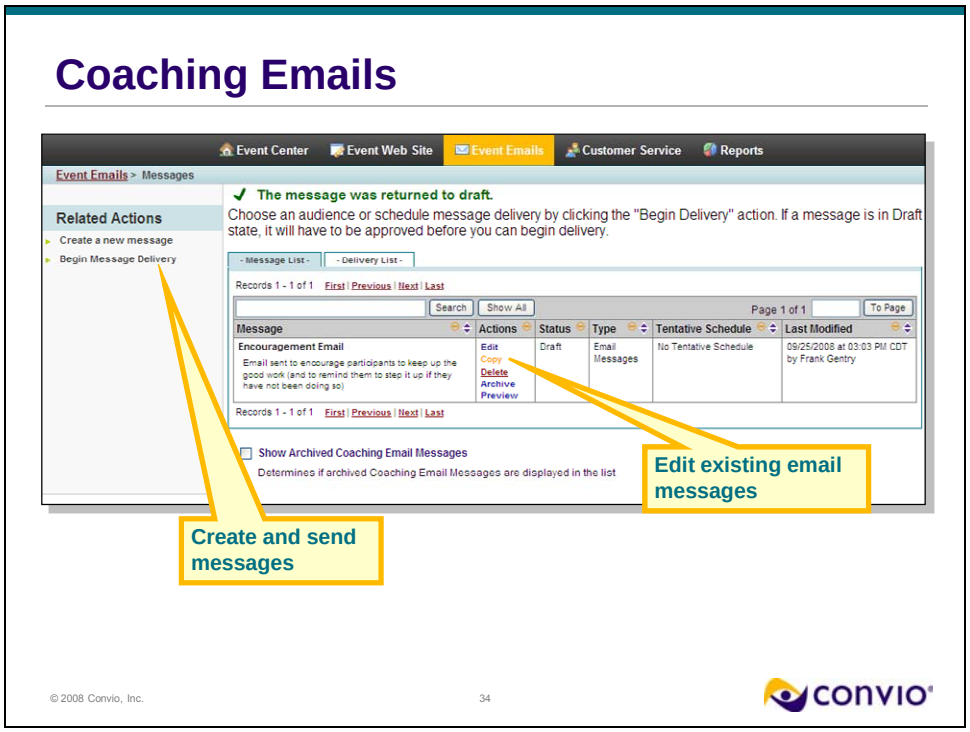


Coaching Emails that you can send to a relevant audience (for example, participants or company coordinators) to guide them in performing their role in this event.

Autoresponders that are sent from the system in response to actions taken (for example, when a participant registers).

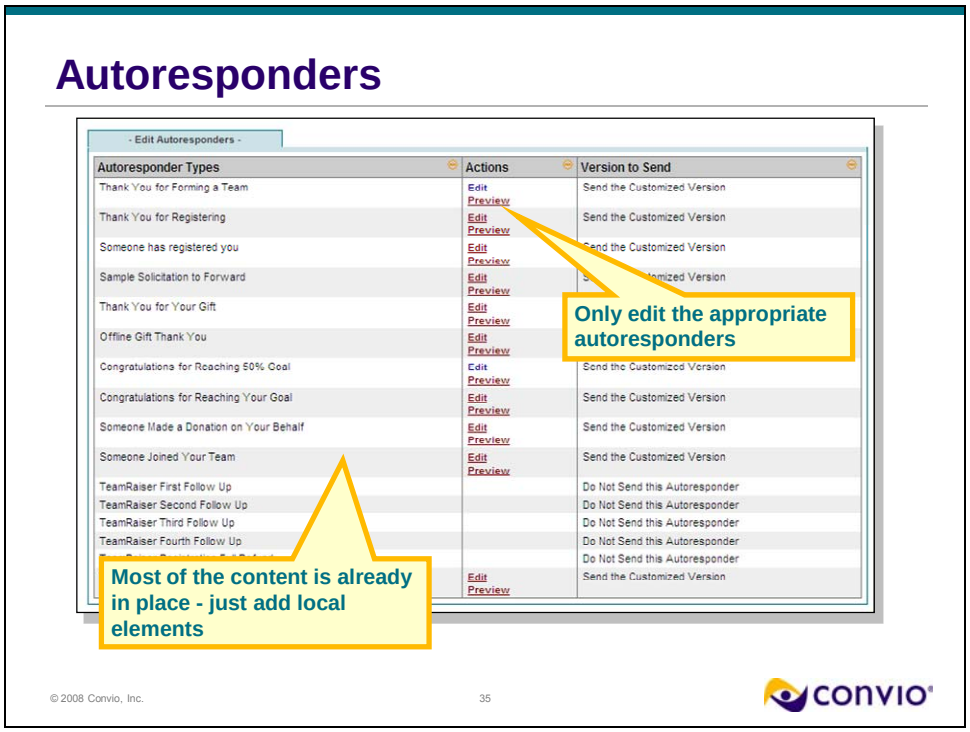
Suggested Messages that participants can send from the Participant Center to their friends and family to recruit them or encourage them to donate.

Coaching Emails



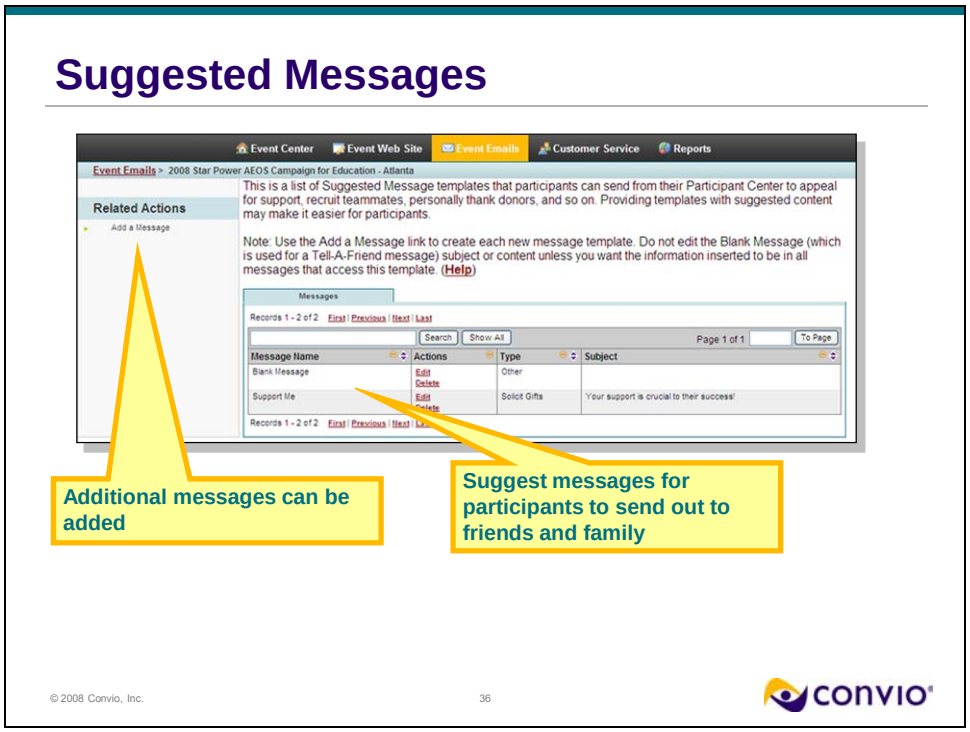
The Administrator must provide at least one coaching email for the Event Manager, who can then copy the email and create new ones. Coaching emails are set up just like regular emails. The difference, though, is that coaching emails can only go to current or past participants or donors, but can be filtered based on specific TeamRaiser values, such as number of emails sent through the Participant Center, or dollars raised for example.

Autorepsonders



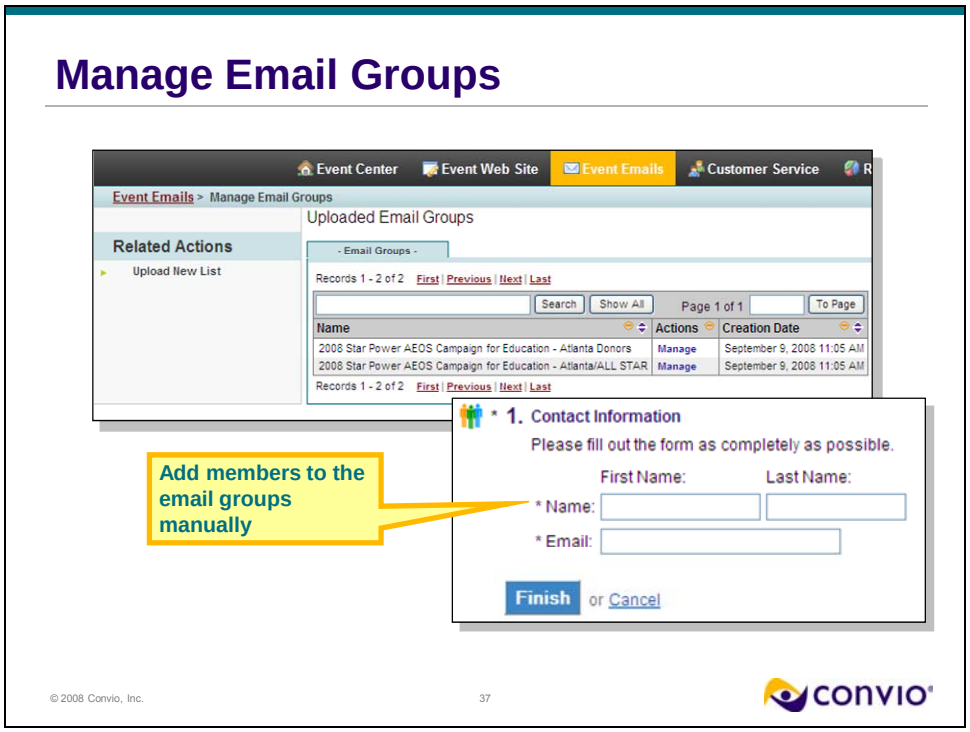
Event Managers cannot change the content of autoresponders, but can only add to them. Again, the Administrator will have had to configure these in advance.

Suggested Messages

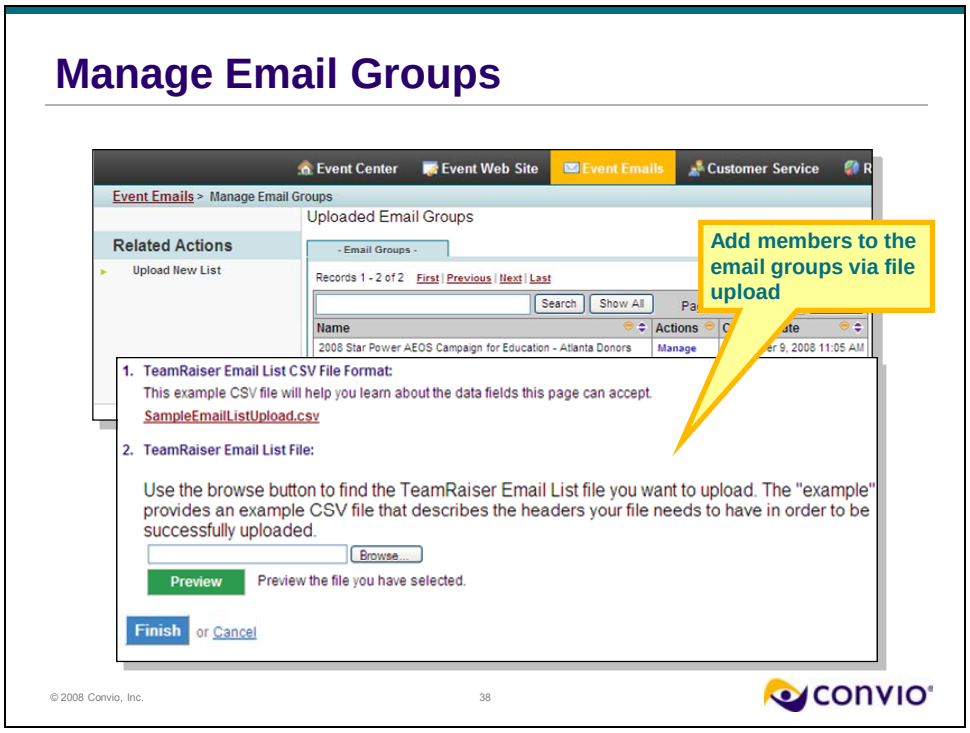


Event Managers can add Suggested Messages or delete current ones if they possess the correct permissions.

Email Groups



Convio will automatically generate groups for each Participation Type that will be used for Coaching Emails.



Event Managers may also have the ability to upload a new group from a spreadsheet.

EXERCISE 3.4: Configuring the Event

Change the Suggested Participant Fundraising Goal

1. From the ***Event Managers*** tab, copy the direct URL and paste into a new browser window
2. Login with the User Name and Password you initially created when you registered as a participant
3. In the **Related Actions** column select ***Edit Event Options***
4. Skip to ***Step 2*** on the **Process Navigator**
5. Change the **Participant Fundraising Goal** to (`$500`)
6. Click ***Next***

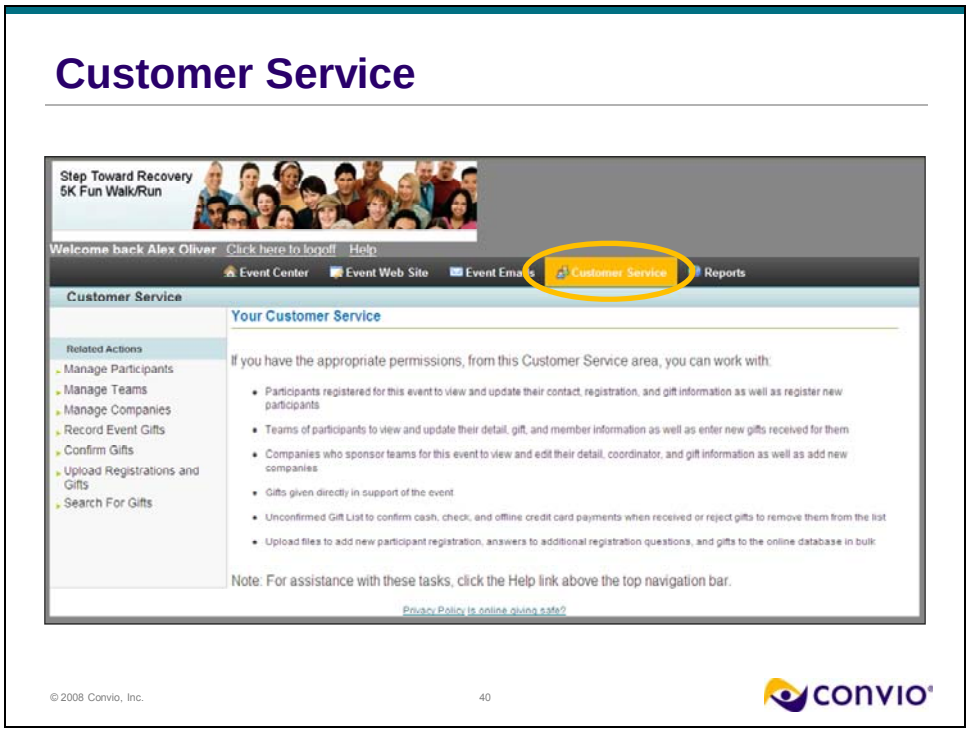
Create a Custom Page

1. Click the ***Event Web Site*** navigation button
2. Click the ***Create a Custom Page*** link
3. Name the page (`Frequently Asked Questions`)
4. Click ***Finish***

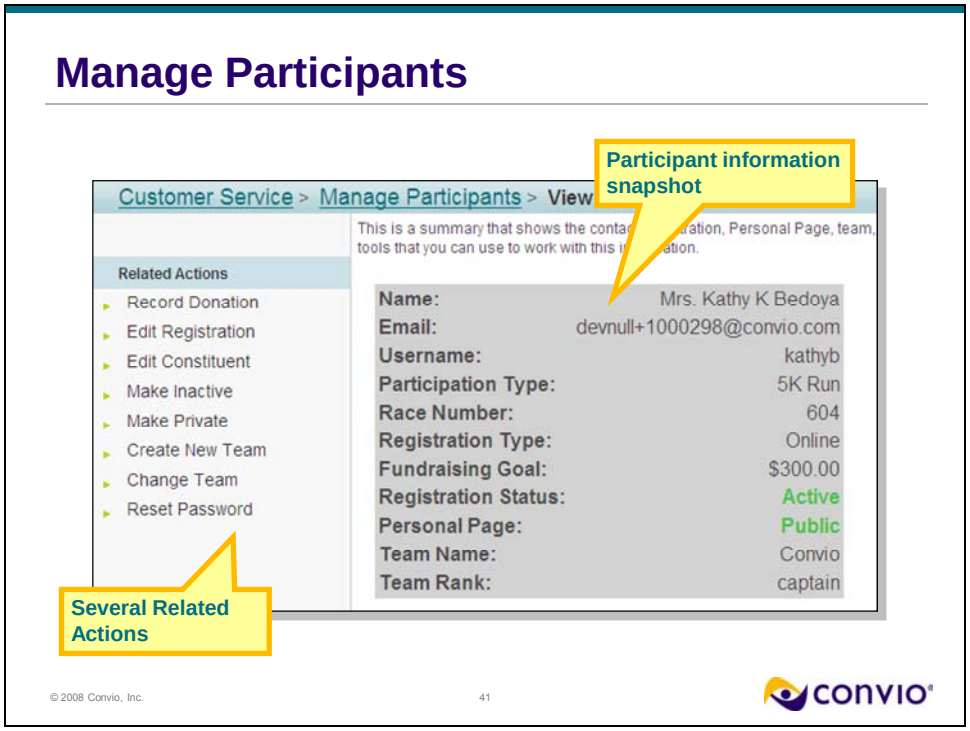
Create a New Suggested Message

1. Click the ***Event Emails*** navigation button
2. Click ***Edit Suggested Messages*** in the **Related Actions** column
3. Click ***Add a Message*** in the **Related Acitons** column
4. Name your message (`Sample Solicitation`)
5. Select ***Solicit Gifts*** as the **Message Type**
6. Type in a subject line
7. Type in sample content
8. Click ***Finish***

Customer Service

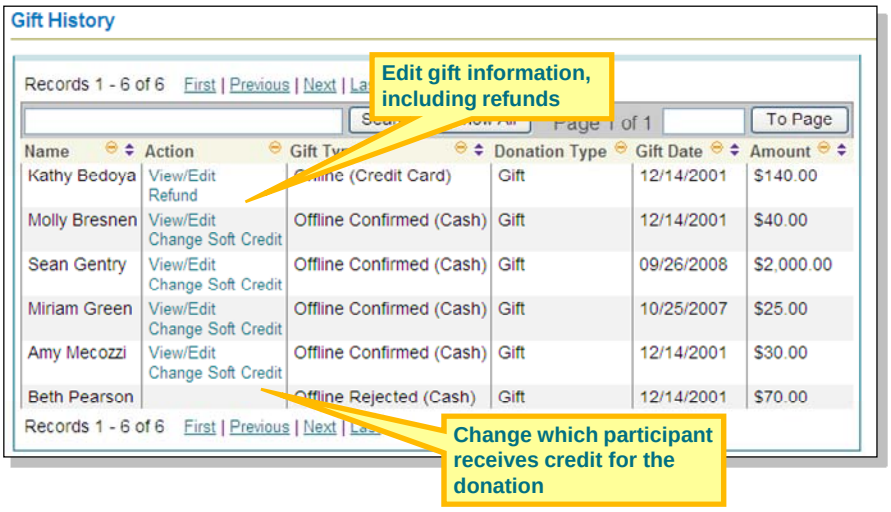


From the **Customer Service** tab, the Event Manager will have the ability to manage participants, teams, companies, record event gifts, search and confirm gifts, change soft credits, or upload new registrations or gifts.



When managing participants, the Event Manager will likely have most of the same privileges as an Admin including the ability to record offline donations, edit registration information and change team membership.

Manage Participants Gift History



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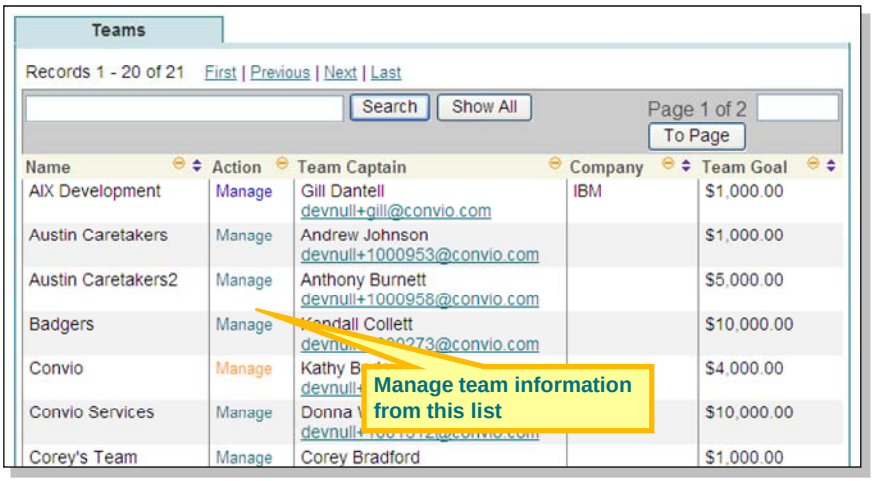
You can also grant an Event Manager the permission to refund a gift or change the soft credit.

Manage Teams



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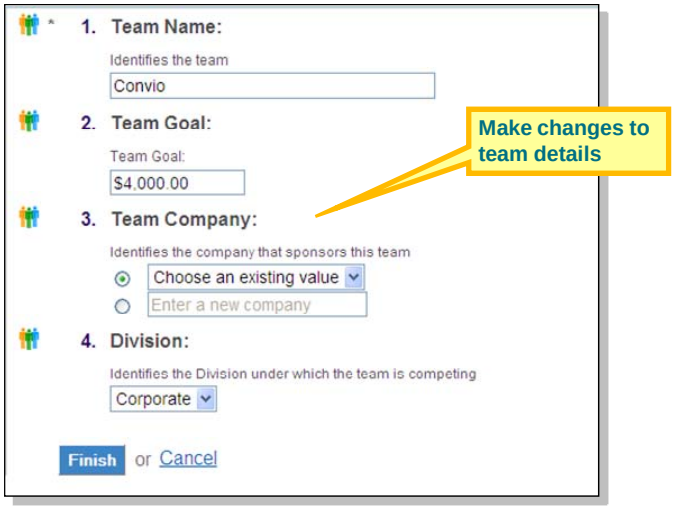
Event Managers can be allowed to manage teams in the same way an Administrator would.

Edit Team Information



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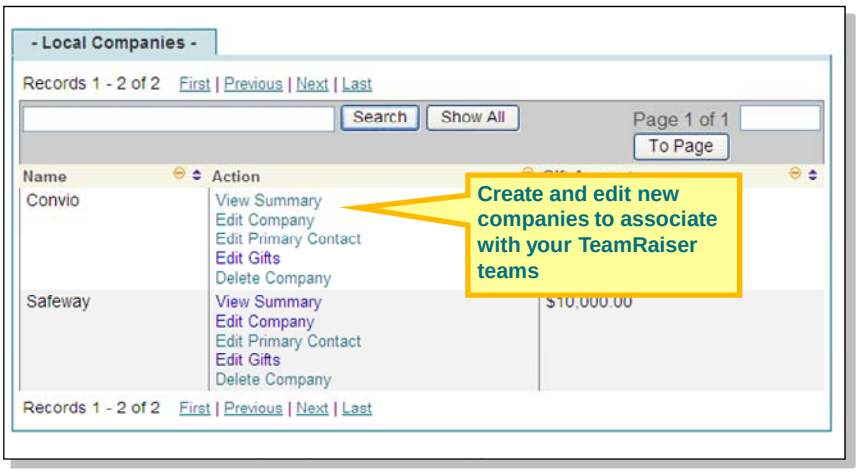
This includes editing the team name, goal, associated company or division.

Manage Companies



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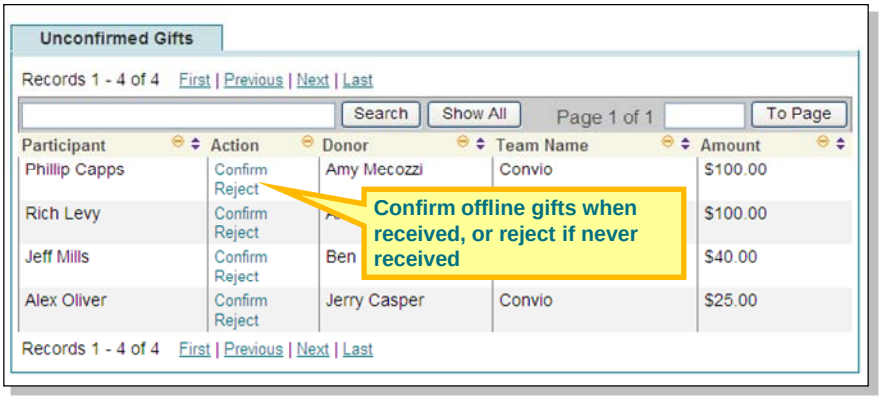
Event Managers may also have access to manage companies.

Manage Unconfirmed Gifts



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The ability to confirm or reject unconfirmed gifts can also be granted.

Reports

- **Coaching Email Performance Report**
  - View statistics on email opens, clickthroughs and bounces
- **Registrations**
  - View a complete set of information pertaining to participant registrations
- **Performance by Event**
  - View an event summary including total dollars raised and number of gifts
- **Gift Summary By Participant**
  - View a one line summary about all donations and fees pertaining to each TeamRaiser participant
- **Gift Details**
  - View a full transaction report for all donations made

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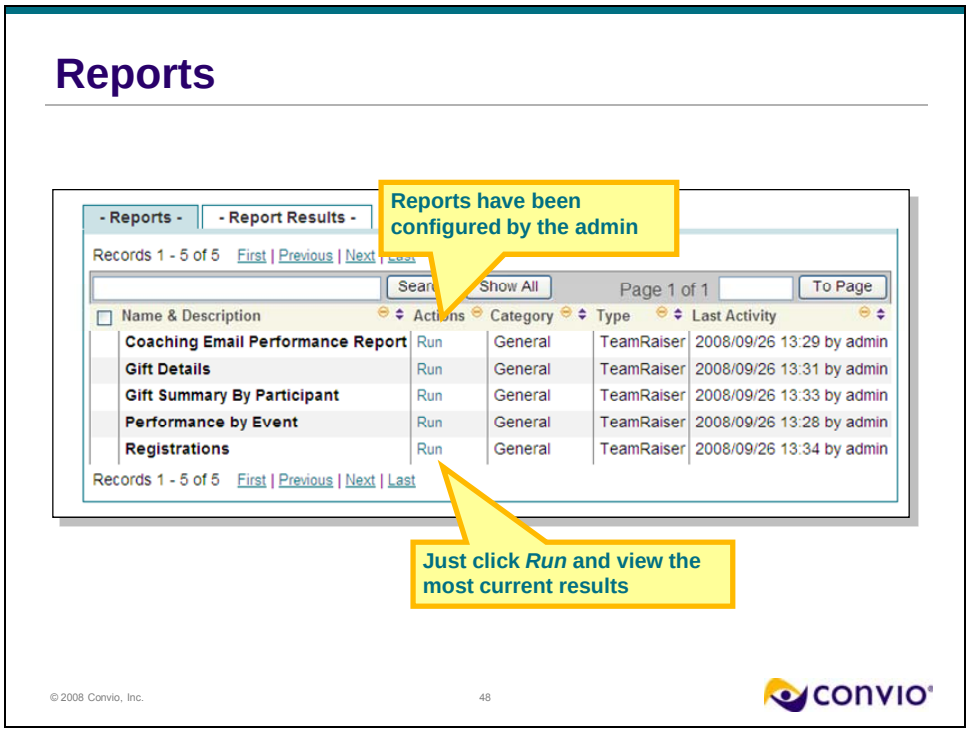
Here is a list of common reports that should be published to Event Managers.



Again, Event Managers do not have the ability to create reports, but can run the reports provided to them by an Administrator. The administrator can decide if filters are editable by the Event Managers when creating the reports.

EXERCISE 3.5: Managing the Event

Register a New Participant as an Individual

1. Click the ***Customer Service*** navigation button
2. Click ***Manage Participants*** in the **Related Actions** column
3. Click the ***Register New Participant*** link
4. Complete the registration with the following:
    a. First and last name and email addres
    b. Any Participation Type
    c. No Tribute
    d. No Team
    e. Answer required questions
    f. No Upsells
    g. Make an additional gift of any dollar amount and record as ***Cash***

Participant Name: _____

Participant Email: _____

Create a New Team with this Individual as the Captain

1. Click the ***Customer Service*** navigation button
2. Click ***Manage Participants*** in the **Related Actions** column
3. Click ***Manage Participant*** next to the participant you just created
4. Click the ***Create New Team*** link in the **Related Actions** column
5. Name the team, set a goal and click ***Finish***

Find a Gift

1. Click the ***Customer Service*** navigation button
2. Click ***Search For Gifts*** in the **Related Actions** column
3. Type in the participant's name in the search fields
4. Click the ***View/Edit*** link next to the gift

Run a Report

1. Click the ***Reports*** navigation button
2. Click ***Run*** next to the report
3. Click ***Next***
4. Label the report and click ***Next***
5. Click the ***Run Report*** button