
Convio Online Marketing & Fundraising 140: TeamRaiser Workshop



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

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	<ul style="list-style-type: none"> Promotion and optimization of email subscription and action Organization credibility components Tiered content access 	<ul style="list-style-type: none"> Reciprocal linking and banner ads Search engine optimization General viral campaign(s) 	<ul style="list-style-type: none"> Regional and/or program specific viral campaigns Affiliate programs and list chaperoning
Motivation: Build relationships	<ul style="list-style-type: none"> Action base membership engagement eGreeting cards 	<ul style="list-style-type: none"> Members services FAQ & submission forms Profile & contact info collection - surveys 	<ul style="list-style-type: none"> Expanded "action membership" benefits
Action: Drive membership and loyalty	<ul style="list-style-type: none"> Optimize donation promotion and flow Content & merchandise offerings Integrated acquisition, renewal and add gift appeals 	<ul style="list-style-type: none"> Designated online giving Event based micro campaigns Upgrade and migration campaigns 	<ul style="list-style-type: none"> Volunteer fundraising Sustained giving Major gifts and planned giving content and mentions
Loyalty:	<ul style="list-style-type: none"> 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

Overview

What is TeamRaiser?

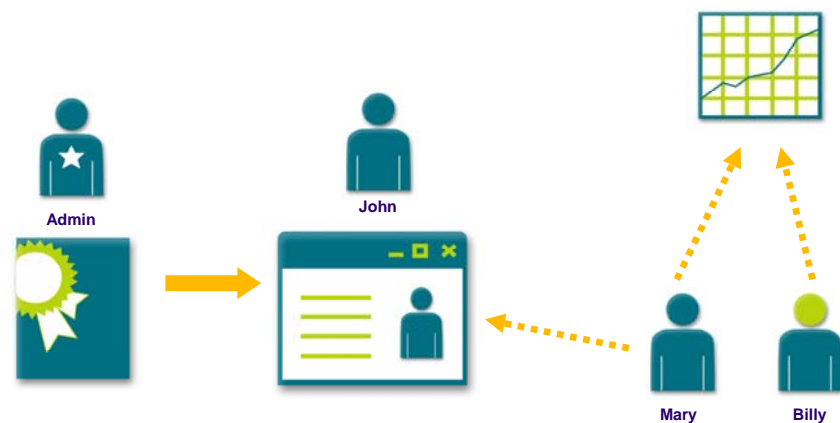
- An event management/marketing/fundraising tool that empowers participants to raise money for your organization with convenient and effective tools

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How It Works



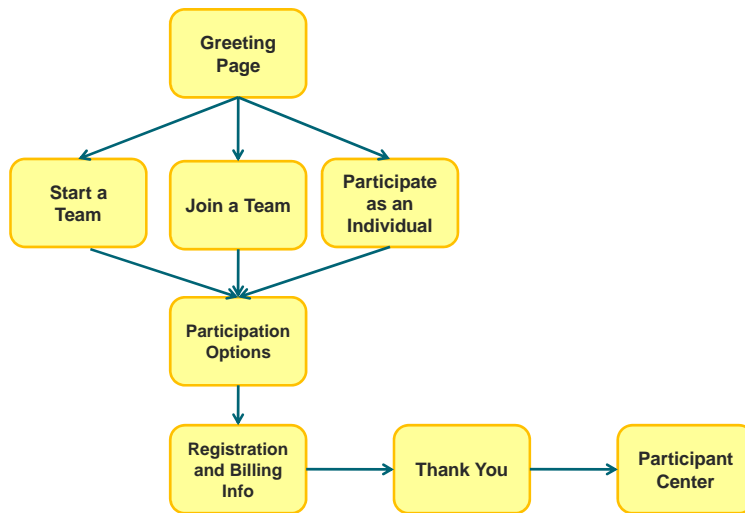
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The Administrator creates and publishes the TeamRaiser event. John signs up to participate and, using the tools, creates his own web page and sends emails to his friends, family and co-workers asking for donations. John's friends, Mary and Billy, make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

Basic Participant Experience Flow



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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

Step Towards Recovery 2008

Step Toward Recovery 5K Run/Walk brings the Central Texas community together in a fun and safe event for all ages and abilities, and helps raise money to support AHS's mission of equal healthcare rights for all. Join us for the fifth annual Step Toward Recovery!

Time: 8:00AM start, packet pickup begins at 6:30AM
Place: Canyon Vista Middle School, Austin, TX

Participate

Join as a team or an individual

First time?

- » [Start a team](#)
- » [Join a team](#)
- » [Participate as an individual](#)

Already registered? [Login](#)

Donate

We welcome your support

- » [Volunteer](#)
- » [Sponsor a walk participant](#)
- » [Make a general gift](#)

Important Registration Dates

Absolutely all ages and abilities are welcome to participate in Step Toward Recovery.

Early Bird (before Sept 1)	\$15.00
General Registration (after Sept 1)	\$20.00
Last Day Registration (Sept 15)	\$20.00

Step Toward Recovery Campaign Progress

Goal: \$450,000.00
Achieved: \$2,130.00

[Make a gift!](#)

Top Teams

Team Alex	\$240.00
For the Folks	\$1,100.00
Convio Star Team	\$690.00

[\[Stop\]](#) [\[Start\]](#)

Top Teams by Division

Corporate

1. [For the Folks](#) - \$1,100.00

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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

1. Join or form a team 2. **Select participation options** 3. Provide contact information 4. Agree to terms 5. Billing information 6. Confirm transaction

Select a Participation Type

☒ **5K Run** \$20.00
 Participate in the nation's largest run for support of mental health awareness and recovery from drug and alcohol addiction. Prizes will be awarded to the top 10 finishers in all age groups.

☐ **1 Mile Fun Run/Walk** \$20.00
 Walk with family, friends, pets and kids in support of ASTMH and the campaign to end alcohol and drug abuse.




☐ **Virtual Walker** No Fee
 Don't live near the walk event? Be a virtual walker! Even if you can't be at one of our walk sites, you can still be a virtual walker from anywhere, 24 hours a day. You can start your own team of virtual walkers, join an existing team, or just participate as an individual.

Would you like to make an additional gift along with your registration fee?

Additional Gift:

☐ Yes, make this an anonymous gift.

☒ Yes, you can display the amount of my donation publicly.

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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

1. Join or form a team 2. Select participation options 3. **Provide contact information** 4. Agree to terms 5. Billing information 6. Confirm transaction

Returning Participant or User Login

If you have a user login to our site, select Returning User and then log in (or, request your login information). You will have a login if you have interacted with our site -- for example, participated in an event before or made a donation. This will keep your contact information in one location and avoid having to enter it again.

Select the appropriate option below.

Are you a new or returning user?

☒ New User

☐ Returning User

Returning Participant Login

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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.

Entering Registration Info

1. Join or form a team

2. Select participation options

3. Provide contact information

4. Agree to terms

5. Billing information

6. Confirm transaction

Contact Information

* = Required Fields


* Name:	Title	First	Middle	Last	Professional Suffix
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
* Email:	<input type="text"/>				
* Street 1:	<input type="text"/>				
Street 2:	<input type="text"/>				
* City/State/ZIP:	City	State		ZIP	
	<input type="text"/>	<input type="text"/>		<input type="text"/>	
Country:	<input type="text"/>				
* Phone Number:	<input type="text"/>				
Employer:	<input type="text"/>				
Emergency Contact:	Name				Phone Number
	<input type="text"/>				<input type="text"/>

☒ Remember me. [What's this?](#)

☒ I would like to be emailed when a gift is made on my behalf.

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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

1. Join or form a team 2. Select participation options 3. Provide contact information 4. **Agree to terms** 5. Billing information 6. Confirm transaction

Please check this box to proceed

 [Printable Version](#) (Opens new window)

I understand that my consent to these provisions is given in consideration of the acceptance of this registration and for being permitted to participate in this event.

I am a voluntary participant in this event, and in good physical condition. I know that this event is a potentially hazardous activity and I hereby assume full and complete responsibility for any injury or accident which may occur during my participation in this event or while on the premises of this event, and I hereby release and hold harmless and covenant not to file suit against the American Health Society, its local Affiliates and any affiliated individuals, the Step Towards Recovery Race and any affiliated individuals, any Race sponsors and their agents and employees, and all other persons or entities associated with this event (the "Releasees"), including, but not limited to Austin Road Runners Club, Inc., Road Runners Club of America, The City of Austin, Department of Parks & Recreation, and USATF from any loss, liability, damage or claims of any kind, present or future, known or unknown, I may have arising out of my participation in this event, including personal injury or damage suffered by me or others, whether same be caused by falls; contact with other participants, spectators or others; the effects of the weather, including heat and/or humidity; traffic; conditions of the course, negligence or fault of the Releasees; or otherwise.

If I do not follow all of the rules of this event, I understand that I may be removed from the competition.

I give my full permission to the American Health Society and its local Affiliates and Races and their sponsors, corporate partners and each of the Releasees to use any photographs, videotapes or other recordings of me that are made during the course of this event without remuneration to me.

☐ I agree with the terms and conditions above


☐ You may publish my photo on the website

Waiver

[Previous Step](#) [Next Step](#) [Cancel](#)

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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

1. Join or form a team 2. Select participation options 3. Provide contact information 4. Agree to terms 5. **Billing information** 6. Confirm transaction

Registration Summary

You have configured 1 registration. The current total cost is \$20.00

Contact Information	Item Information	Price
Yada Hooley 1234 Main Austin, TX 78757 bbradford.yh@convio.com Edit	Participation Type: 5K Run Extra Gift: \$0.00	\$20.00
Total: \$20.00		

Would you like to register another family member?

First Name:


Last Name:

[Register Family Member](#) [Complete Registration](#) [Cancel](#)

Registration Summary

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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

1. Join or form a team 2. Select participation options 3. Provide contact information 4. Agree to terms 5. **Billing information** 6. Confirm transaction

Billing Information

* = Required Fields

Title:

* First Name:

Middle Name:

* Last Name:

* Email Address:

Billing Address

* Billing Address 1:

Billing Address 2:

* City:

* State / Province:

* ZIP / Postal Code:

Country:

* Credit Card: ☐ ☐ ☐ ☐

* Card Number:

* Verification Code: [What is this?](#)

* Expiration month:

* Expiration year:

Billing Info

VeriSign Secured
VERIFY
ABOUT SSL CERTIFICATES
[Is it safe to use my credit card?](#)

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Confirming Registration

1. Join or form a team 2. Select participation options 3. Provide contact information 4. Agree to terms 5. Billing information 6. **Confirm transaction**

To proceed with your payment, please verify the following information. To make any corrections, click the **Previous Step** button.

First Name:	Yada
Last Name:	Hoey
Email Address:	bbradford+yh@convio.com
ZIP Code:	78757
Credit Card Number:	*****1111
Payment Amount:	\$40.00

Confirmation

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Accessing the Participant Center

Dear Yada,

Thank you for registering for the **Step Towards Recovery Race**. For the past six years, more than \$1,000,000 has been raised because of your efforts. Please help us make this Race the largest and most successful race ever, and exceed our goal of \$500,000 in funds.

In the past 20 years medical science has made great strides in learning about substance use and the nature of addiction. Addiction is a chronic, relapsing illness that involves a number of brain chemistry disorders. Treatment for addiction is as effective as treatments for other chronic medical conditions, such as diabetes and high blood pressure.

[Access your Participant Center now!](#)

Raising funds to increase awareness and provide treatment for alcohol and drug addiction is now easier than ever! You now have access to a [password-protected Participant Center](#) where you can create your own personalized donation page, send out recruiting and fundraising e-mails, record gifts you receive offline and view a record of all gifts that you've received online. Additionally, as a Team Captain, you will receive special notices and have the ability to post notices to your team using the Participant Center. To access the participant Center, simply click [here](#). Be sure to bookmark it, we're sure that you will want to come back often!

If at any point you need further assistance, please do not hesitate to call our Teams Coordinator, Jane Smith at (512) 555-1212.

Sincerely,



Gene Austin
2001 Teams Chair

Thank You

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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

Participant Center Personal Page Address Book Email Follow-up My Progress

What should I do next?
Help me get started

The first thing you should do is customize your personal page. [Edit your personal page.](#)

Welcome To Your Participant Center, Yada!
Here are the steps to follow to get started on your online fundraising success:

1. **First, edit your personal page.** You can update your personal page with your personal Reason to Relay and update the picture on your page.
2. **Second, update your email address book and email your family and friends.** Our online import tool is the easiest way to import addresses from your personal e-mail account. You can also manually enter in addresses or use our offline import tool. We have provided message templates to help you get started recruiting team members, asking for donations, and thanking donors and new team members!
3. **The follow-up tool will help you follow up with your donors, team members, and friends and family.** Once your fundraising is underway, you can come back to your participant center to check your fundraising progress and your team's fundraising progress.

Fundraising Goal: \$300.00
New goal:
[Update Goal](#)
[Update personal URLs](#)
Your campaign is **public**.
[Make my campaign private](#)
[Gift and receive items](#)

Home Page

Participants can see communications from the organization

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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.

Editing the Personal Page

Participant Center **Personal Page** Address Book Email Follow-ups My Progress

What should I do next?
[Help me get started](#) You can upload names from your address book or enter names by hand. [Get your address book](#)

Your personal page is a web page where your friends and family can read about why you are supporting this cause and sponsor you by making an online donation. Follow the steps below to personalize your page.

1. Design the look of this page.
 Select a [layout template](#) for this page: Single Photo/Status Left edge
 Select a [style to change your text and color scheme](#): Default
[Show me how](#)
2. Edit the content of this page.
[Click here to open this page for editing](#)
3. Save your changes.
Save my changes Refresh preview Return to Participant Center

Welcome to my Personal Page

Support Yada!

Yada Hooley

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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.

Uploading Address Book

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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.**

Selecting a Suggested Message

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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

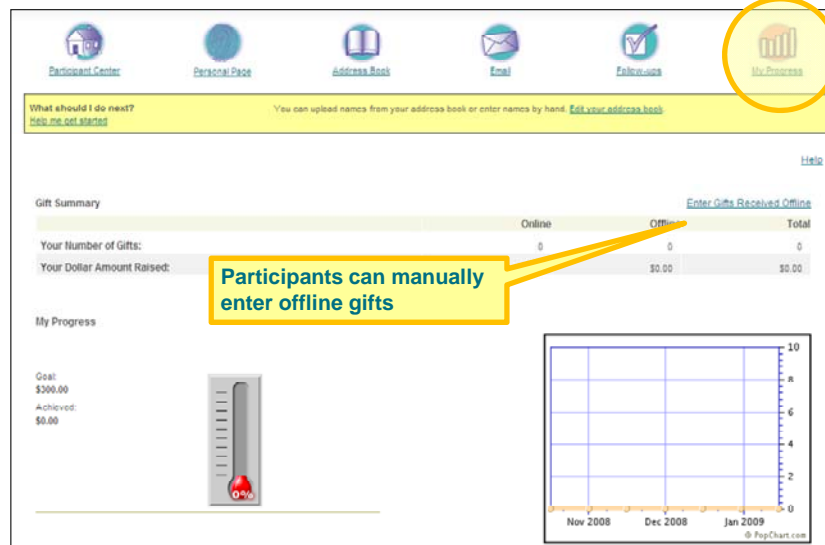
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The Follow-ups page allows participants to see which of their emails sent have yielded a donation. Flags appear next to contacts based on donation history, and the contact list itself can be filtered based on certain actions or attributes.

Tracking Progress



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

The Donor Experience

Step Towards Recovery 2008

Step Toward Recovery 5K Run/Walk brings the Central Texas community together in a fun and safe event for all ages and abilities, and helps raise money to support AHS's mission of equal healthcare rights for all. Join us for the fifth annual Step Toward Recovery!

Time: 8:00AM start, packet pickup begins at 6:30AM
Place: Canyon Vista Middle School, Austin, TX

Participate

Join as a team or an individual

First time?

- » [Start a team](#)
- » [Join a team](#)
- » [Participate as an individual](#)

Already registered? [Login](#)

Donate

We welcome your support

- » [Volunteer](#)
- » [Sponsor a walk participant](#)
- » [Make a general gift](#)

Important Registration Dates

Absolutely all ages and abilities are welcome to participate in Step Toward Recovery.

Early Bird (before Sept 1)	\$15.00
General Registration (after Sept 1)	\$20.00
Last Day Registration (Sept 15)	\$20.00

Step Toward Recovery Campaign Progress

Goal: \$450,000.00
Achieved: \$2,130.00

[Make a gift!](#)

Top Teams

Team Alex	\$240.00
For the Folks	\$1,100.00
Convio Star Team	\$690.00

[\[Stop\]](#) [\[Start\]](#)

Top Teams by Division
Corporate

- [For the Folks](#) - \$1,100.00

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

Finding a Participant

To perform a search, enter your criteria below.

☒ Search for a participant.
☐ Search for a team.

First Name:
 Last Name:
 Home State:

Search by participant or team

Select participant

Select one of the participants below or click here to [add a new participant directly](#).

Name	Team	Team Company	Team Division
Hoover, Yada			

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

Find a Participant

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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.

Making a Gift

The screenshot shows a personal page titled "Welcome to my Personal Page" for "Support Yada!". On the left, there's a "Yada Hooley" progress bar showing 0% progress towards a \$300.00 goal. A yellow callout box points to the "Make a gift!" link with the text "Donors select the Make a gift! link". To the right, under "Why I Run", is a personal story about participating in the 6th Annual Step Towards Recovery. A photo of a person running is also visible. An inset shows the donation form with fields for "Select Gift Amount" (radio buttons for \$25.00, \$50.00, \$100.00, and "Enter an amount"), "Billing Information" (First Name, Last Name, Suffix, Street 1, Street 2, City, State/Province, ZIP/Postal Code, Country), and a checkbox for "Yes, I would like to receive communications from this organization".

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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 <hr/>	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? <hr/>	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.) <hr/> <hr/> <hr/>	3 (Related Actions) / 6
5. SHOW PARTICIPANTS UNCONFIRMED GIFTS Do you want unconfirmed gifts to show in the Gift History list in the Participant 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

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.

3a

Yes / No

10. PARTICIPANTS ENTER CREDIT CARD DONATION IN PARTICIPANT CENTER

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

3a

Yes / No

11. REGISTRATION FEES COUNT TOWARD GOAL

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

3a

Yes / No

12. OBJECTIONABLE CONTENT EMAIL

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

3b

13. BLOGGING

Would you like to enable blogs on participant's personal pages?

Yes / No

3b**14. TEAM FORMATION**

Do you want participants to be able to form teams?

Yes / No

4**15. TEAM DIVISIONS**

Do you have team categories/divisions defined? If so, please list them all below.

4

16. COMPANY TEAMS

Do you want Team Captains to be able to associate the team they are forming with a company?

Yes / No

4**17. PARTICIPATION TYPES AND FEES**

Please list your different participation types and fees:

6

Identifying Common Configuration Options

Previous Event Association

Process Navigator

1. Identify TeamRaiser
2. Select Fundraising Options

6. Previous Event Association:
Links this event to a previous event to provide returning participants with access to their Personal Page and donation history (Note that this will provide additional report data as well)

No Event Selected

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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.)

10. Rich Text Editor Availability on Appropriate Pages:
Determines if the Rich Text Editor is available for entering and formatting content on the Personal

☒ **Yes, enable the Rich Text Editor on the appropriate pages**

Participants Customize Personal Page

Support Telly!

Telly Test



Goal: \$300.00

Achieved: \$150.00

[Make a gift!](#)

Fundraising Honor Roll

Jane Test

\$120.00

Sally Field

\$60.00

[\[Show\]](#)

[\[Hide\]](#)

Offline Donation Recording

3. Select Event Options

- a. Define Fundraising Options
- b. Define Event Options
- c. Define Misc Options

1. Offline Gift Recording by Participants:

Determines if participants can enter offline gifts that donors give to them and if they display in the funds raised amounts depending on the setting for the "Fundraising To

☒ Yes, allow participants to record offline gifts that donors give them

What should I do next?
[Data not attached](#)

your address book or enter names by hand: [Edit your address book](#)

Enter Gifts Received Offline

Gift Summary	Online	Offline	Total
Your Number of Gifts:	0	0	0
Your Dollar Amount Raised:	\$0.00	\$0.00	\$0.00

My Progress

Goal: 3000.00
Achieved: \$0.00

Nov 2008 Dec 2008 Jan 2009

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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.

Team Formation

3. Select Event Options

4. Select Team Options

5. Associate Upsells

2. Team Formation:

Determines if a registering participant can form a team for this event and become the Team Captain

Note: This option must be enabled to use the other team options below.

☒ Yes, allow a participant to form a team to register and then assign that participant as the Captain

* Team Name:

Team Company: ☒ Choose an existing value ☐ Enter a new company

Team Division:

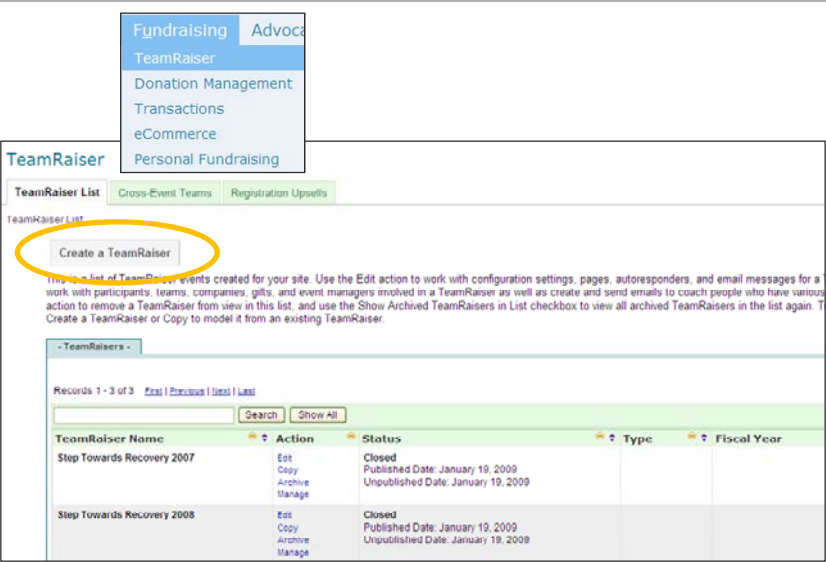
Fundraising Goal:

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

Creating a TeamRaiser From Scratch

Creating a TeamRaiser from Scratch



The screenshot shows the 'Fundraising' menu open, with 'TeamRaiser' selected. Below the menu, the 'TeamRaiser List' section contains a 'Create a TeamRaiser' button, which is circled in orange. The button is located above a table of existing TeamRaisers.

TeamRaiser List

Create a TeamRaiser

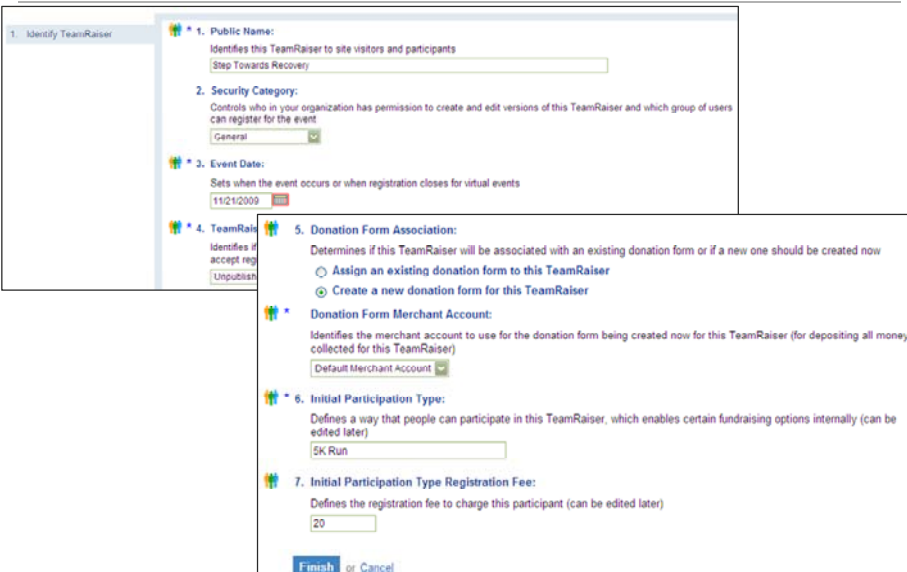
This is a list of TeamRaiser events created for your site. Use the Edit action to work with configuration settings, pages, autoreponders, and email messages for a work with participants, teams, companies, gifts, and event managers involved in a TeamRaiser as well as create and send emails to coach people who have various action to remove a TeamRaiser from view in this list, and use the Show Archived TeamRaisers in List checkbox to view all archived TeamRaisers in the list again. To Create a TeamRaiser or Copy to model it from an existing TeamRaiser.

TeamRaiser Name	Action	Status	Type	Fiscal Year
Step Towards Recovery 2007	Edit Copy Archive Manage	Closed Published Date: January 19, 2009 Unpublished Date: January 19, 2009		
Step Towards Recovery 2008	Edit Copy Archive Manage	Closed Published Date: January 19, 2009 Unpublished Date: January 19, 2009		

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

Creating a TeamRaiser



The screenshot shows the 'Create a TeamRaiser' wizard with the following steps:

- 1. Identify TeamRaiser:** Identifies this TeamRaiser to site visitors and participants. Example: Step Towards Recovery.
- 2. Security Category:** Controls who in your organization has permission to create and edit versions of this TeamRaiser and which group of users can register for the event. Example: General.
- 3. Event Date:** Sets when the event occurs or when registration closes for virtual events. Example: 11/21/2009.
- 4. TeamRaiser:** Identifies if accept reg. Example: Unpublish.
- 5. Donation Form Association:** Determines if this TeamRaiser will be associated with an existing donation form or if a new one should be created now. Options: Assign an existing donation form to this TeamRaiser, Create a new donation form for this TeamRaiser.
- 6. Donation Form Merchant Account:** Identifies the merchant account to use for the donation form being created now for this TeamRaiser (for depositing all money collected for this TeamRaiser). Example: Default Merchant Account.
- 7. Initial Participation Type:** Defines a way that people can participate in this TeamRaiser, which enables certain fundraising options internally (can be edited later). Example: SK Run.
- 8. Initial Participation Type Registration Fee:** Defines the registration fee to charge this participant (can be edited later). Example: 20.

Finish or Cancel

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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**.

Editing the Event

- TeamRaisers -


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

TeamRaiser Name	Action	Status
Step Towards Recovery 2007	Edit Copy Archive Manage	Closed Published Date: January 19, 2009 Unpublished Date: January 19, 2009
Step Towards Recovery 2008	Edit Copy Archive Manage	Closed Published Date: January 19, 2009 Unpublished Date: January 19, 2009
Step Towards Recovery 2009	Edit Copy Archive Manage	Unpublished Published Date: N/A Unpublished Date: N/A

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

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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

1. Identify TeamRaiser

2. Select Fundraising Options

3. Select Event Options

4. Select Team Options

5. Associate Upsells

6. Manage Participation Types

7. Manage Discounts

8. Manage Stationery

9. Manage Autoresponders

10. Customize Suggested Messages

11. Customize Pages

12. Customize Event URL

13. Test Drive

14. Publish

*** 1. Administrative Name:**
Uniquely identifies this TeamRaiser in the TeamRaiser list
Step Towards Recovery 2009

*** 2. Public Name:**
Identifies this TeamRaiser to site visitors and participants
Step Towards Recovery

3. Security Category:
Controls who in your organization has permission to create and edit versions of this TeamRaiser and which group of users can register for the event
General

4. Event Date:
Sets when the event occurs (or, for virtual events, when registration begins)
Nov 21 2009

5. Fiscal Year:
Restricts the availability of this Regional Team to a specific accounting year
2009

6. Previous Event Association:
Links this event to a previous event to provide returning participants with access to their Personal Page and donation history (Note that this will provide additional report data as well)
No Event Selected

On year two, make sure to link to year one

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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

1. Identify TeamRaiser

2. Select Fundraising Options

3. Select Event Options

4. Select Team Options

5. Associate Upsells

6. Manage Participation Types

7. Manage Discounts

8. Manage Stationery

9. Manage Autoresponders

10. Customize Suggested Messages

11. Customize Pages

12. Customize Event URL

13. Test Drive

14. Publish

*** 1. Donation Form:**
Determines the donation form to display to donors who make online gifts to this TeamRaiser
Step Towards Recovery 2009 Donation Campaign - Step Towards Recovery 2009 Donation Form

2. Fundraising Goal:
Determines if this TeamRaiser will have its own goal that will be used on all progress meters for this event and sets the monetary amount of the goal. Leave unselected to use goals associated with the donation campaign.
☒ Yes, this TeamRaiser will have a goal that is different from any goals specified for the donation campaign

3. TeamRaiser Goal:
Defines the monetary amount that event organizers hope to raise for
\$000000

4. Additional Donation with Registration:
Displays the Additional Gift field on the participant registration form.
☒ Yes, display the Additional Gift field on the participant registration forms

5. Multiple Registrations:
Determines if a person can register additional participants and gather all fees into one payment (each person registered has access to their own Personal Page)
☒ Yes, allow a participant to register additional participants in one registration payment

6. Tax ID:
Sets a specific tax identification number for the TeamRaiser (leave blank to use the site-wide Tax ID)

Next Save or Cancel

If desired, enable multiple registrations here

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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.

Selecting Event Options

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

Related Actions

- ▶ [Edit Event Questions](#)
- ▶ [Edit Advanced Options](#)
- ▶ [Identify Location Details](#)

1. Personal Page Customization:

Determines who can customize the Personal Page, which is available to each registered participant regardless of who also available to each secondary registrant if multiple registrations are allowed)

- ☒ Participants can design and customize their own Personal Page
- ☐ Participants on teams will use the default Personal Page customized by the Team Captain
- ☐ Participants will use the default Personal Page customized by an Event Manager or administrator

2. Participant Center Gift Status:

If this checkbox is checked, the gift history list in the Participant Center will indicate which gifts are unconfirmed.

☒ Yes, inform participants about which gifts are unconfirmed in the participant gift history list.

3. Participant Fundraising Goal:

Allows participants to enter a Fundraising Goal when registering

☒ Yes, allow participants to enter a personal fundraising goal

4. Suggested Participant Fundraising Goal:

Defines the suggested goal that will display to registering participants if participant fundraising goals are enabled for th

5. Interest Categories:

Defines interest categories to associate with this TeamRaiser event.

☐ Expand All ☐ Collapse All

Name
No items found

[Next](#) or [Cancel](#)

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


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v. 5.4 Rev 01/09

Defining Fundraising Options

<ol style="list-style-type: none"> Identify TeamRaiser Select Fundraising Options Select Event Options <ol style="list-style-type: none"> Define Fundraising Options Define Event Options Define Misc Options Select Team Options Associate Upsells Manage Participation Types Manage Discounts Manage Stationery Manage Autoresponders Customize Suggested Messages Customize Pages Customize Event URL Test Drive Publish 	<ol style="list-style-type: none"> Offline Gift Recording by Participants: Determines if participants can enter offline gifts that donors give to them and if they can view the gifts they enter (Note: The value of display in the funds raised amounts depending on the setting for the "Fundraising Totals Includes Unconfirmed Gifts" option) <input checked="" type="checkbox"/> Yes, allow participants to record offline gifts that donors give them Fundraising Totals Includes Unconfirmed Gifts: Determines if the value of unconfirmed gifts should be included in Fundraising Totals (Note: This is affected by the value of the "Offline Gift Recording by Participants" option) <input checked="" type="checkbox"/> Yes, include the value of unconfirmed gifts in fundraising totals Offline Payment Types that Participants Can Enter: Identifies the payment types (cash, check, credit, later) that participants can enter when recording offline gifts that donors give to them (Note: means that all payment types can be recorded) <input type="text"/> Recurring Gifts: Determines if the full value of a recurring gift displays in the fundraising totals of the participant or if the value of each increment processed <input type="checkbox"/> Yes, credit the full value of recurring gifts incrementally Offline Gift Payment Credit Card Processing: Determines if participants can input credit card information <input checked="" type="checkbox"/> Yes, allow participants to input credit card information Offline Gift Payment Recording by Administrators: Determines if administrators can enter credit card information for online registrations and gifts they are entering <input checked="" type="checkbox"/> Yes, allow administrators to input credit card information as well as cash and checks Status Indicators Include the Monetary Value of Registration Fees: Determines if registration fees should be included in the amount raised by participants and teams in all status indicators and lists <input type="checkbox"/> Yes, include the value of registration fees in the status indicators Top Gifts Status Indicator Displays Amounts: Determines if the gift amounts should be displayed in the Top Gifts Status Indicator <input checked="" type="checkbox"/> Yes, display the amount of each gift in the Top Gifts Status Indicator Top Participant Status Indicator Displays Amounts: Determines if the amount raised should be displayed in the Top Participants Status Indicator <input checked="" type="checkbox"/> Yes, display the amount raised in the Top Participant Status Indicator Top Teams Status Indicator Displays Amounts: Determines if amounts should be displayed in the Top Teams Status Indicator <input checked="" type="checkbox"/> Yes, display the amount raised in the Top Teams Status Indicator Status Indicator Count Description: Defines the label used in status indicators when the number of donations is displayed instead of the monetary amount of funds collected (donations)
---	--

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You can allow participants to enter in credit cards for offline gifts

Allow offline gifts to be recorded by participants


Do not include registration fees in status indicators

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.

Defining Event Options

<ol style="list-style-type: none"> Identify TeamRaiser Select Fundraising Options Select Event Options <ol style="list-style-type: none"> Define Fundraising Options Define Event Options Define Misc Options Select Team Options Associate Upsells Manage Participation Types Manage Discounts Manage Stationery Manage Autoresponders Customize Suggested Messages 	<ol style="list-style-type: none"> Next Step Section Displays On All Pages in the Participant Center: Determines if the Next Step section should display on every page in the Participant Center, or on the Participant Center page only <input checked="" type="checkbox"/> Yes, display the Next Step section on every page in the Participant Center Participant Personal Page Modified Notification: Lists the email addresses of the administrators who should receive the notification that a participant modified their Personal Page (leave this field blank to avoid sending this notification to anyone) <input type="text"/> Participant Personal Page Availability after Registration: Determines if the name of a participant is included in public searches before their Personal Page is approved <input type="checkbox"/> Yes, the Personal Page Status should be set to Private until the page is approved Participant Personal Page Objectionable Content Notification: Lists the email addresses of the administrators who should receive the notification that a participant clicked on an objectionable content link (do not leave this blank because the objectionable content link is required) <input type="text"/> Participant Personal Page Blogging: Determines if the participants can display a blog on their Personal Page <input checked="" type="checkbox"/> Yes, allow participants to track and display blog statistics for emails that they send out Participant Personal Page Blog: Determines if participants can enable and create a blog on their Personal Page <input checked="" type="checkbox"/> Yes, allow participants to enable a blog on their Personal Page Participant Personal Page Modification Approval: Determines if administrators must approve Personal Pages before they become visible <input type="checkbox"/> Yes, an administrator must approve changes that participants make to their Personal Page Donor Addresses Displayed in Address Book: Determines if the postal address of online donors will also be displayed in the Address Book of the participant (Note: This is only applicable if the participant's address is not blank) <input type="checkbox"/> Yes, display donor addresses in the Address Book of participants Participants Can Change Personal Page Layout: Determines if participants can change the layout of their Personal Page <input checked="" type="checkbox"/> Yes, allow participants to change the layout of their Personal Page Participant Personal Page Style Sheets: Determines if participants can change the style sheet that controls colors and fonts on their Personal Page <input checked="" type="checkbox"/> Yes, allow participants to change the style sheet that controls their Personal Page colors and fonts Participants Can Select the Personal Page Status Indicators: Determines if participants can select the status indicators to display on their Personal Page <input checked="" type="checkbox"/> Yes, allow participants to select the status indicators that display on their Personal Page Registration Question Responses Required: Determines if administrators must provide responses to registration questions when registering a participant <input checked="" type="checkbox"/> Yes, administrators must enter responses to registration questions when registering a participant Registration User Name/Password: Determines if the user name and password are required when registering a participant <input type="checkbox"/> Yes, administrators may enter the user name and password when registering a participant Participant Search: Determines if participants can search for participants <input type="radio"/> People can search for participants registered for all TeamRaisers <input type="radio"/> People can only search for participants registered for this TeamRaiser <input type="radio"/> People can search for participants registered for the current TeamRaiser and other TeamRaisers of the same type
--	--

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Blogging

To whom will objectionable content emails be sent?

Personal Page editing

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.

Defining Misc Options

3. Select Event Options

- a. Define Fundraising Options
- b. Define Event Options
- c. Define Misc Options

Event Shortcut URL DNS Display Name:
Defines the displayed DNS name of the event shortcut URL displayed to Event Managers or Administrators

8. Event Shortcut URL Prefix:
Defines the string to add as a prefix to the internal shortcut URL when Event Managers or Administrators will not update the shortcut URL if it already exists.)

9. HTML Editor for Suggested Messages:
Determines if the HTML Editor displays in the Suggested Messages section.
☒ Yes, enable the HTML Editor for Suggested Messages

10. Rich Text Editor Availability on Appropriate Pages:
Determines if the Rich Text Editor is available for entering and formatting content on the Personal, Team, and Suggested Messages pages.
☐ Yes, enable the Rich Text Editor on the appropriate pages

Enable HTML on Personal Pages if desired

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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.

Selecting Team Options

1. Identify TeamRaider

2. Select Fundraising Options

3. Select Event Options

4. Select Team Options

5. Associate Upells

6. Manage Participation Types

7. Manage Discounts

8. Manage Stationary

9. Manage Autoresponders

10. Customize Suggested Messages

11. Customize Pages

12. Customize Event URL

13. Test Drive

14. Publish

Related Actions

✚ Edit Team Captain Questions

1. Honorary Teams:
Determines if participants will be randomly assigned to an Honorary Team (typically for a sport with the team the participants have joined).
☐ Yes, assign each participant to an Honorary Team by random assignment

2. Team Formation:
Determines if a registering participant can form a team for this event and become the Team Captain.
Note: This option must be enabled to use the other team options below.
☒ Yes, allow a participant to form a team to register and then assign that participant as the Captain

3. Team Size:
Defines the maximum number of members allowed on a team

4. Password-Protected Teams:
Determines if a Team Captain can assign a password that others must know in order to join the team.
☐ Yes, allow Team Captains to assign passwords for admission to their teams

5. Company Teams:
Determines if fields and selection lists will display on participant registration forms so Team Captains can associate their teams with a company.
☒ Yes, allow a Team Captain to associate the team they are forming with a company
☐ Only display a selectable list of company names (without displaying a text input field for adding a company)

6. Team Divisions:
Defines the names of divisions that Team Captains can select when they form their team (Note: Leave blank to have no Division in registration forms.)

7. Team Gifts:
Determines if donors can make gifts directly to teams instead of to specific participants.
☒ Yes, allow donors to make gifts to teams

Next Save or Cancel

Allow team formation

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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.

Managing Participation Types

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

Create a New Participation Type

This is a list of the participation types that define how a person can participate in this TeamRaiser. Use the Edit action to modify the attributes of an existing participation type (including adding constituent record fields, Additional Options for purchase/selection, Questions, and a banner image to the registration form). Use the Order column to determine the order in which these participation types display on the registration form. To create a new participation type, click Create a New Participation Type or Copy to use an existing participation type to use as a model.

Participation Type	Actions	Order	Registration Fee	Deductible Amount
5K Run	Edit Copy Delete	0	\$20.00	\$0.00

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

[Next](#) [Save](#) or [Cancel](#)

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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.

Identifying Type

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
a. Identify Type
b. Select Type Options
c. Select Registration Info
d. Customize Waiver
e. Add Banner Image
f. Include Upsells
g. Include Questions
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

1. Name:
Identifies what the person will be doing for this participation type (for example, 5K Runner or Course Walker)

2. Description:
Provides details to distinguish this participation type from other available participation types.

3. Registration Fee:
Defines the monetary amount that registrants who select this participation type will be charged

4. Tax Deductible Amount:
Defines the portion of the fee that these participants can deduct from their taxes

5. Fundraising Enabled:
Determines if these participants will be raising money for this TeamRaiser and have access to fundraising tool Participant Center (Note that the Fundraising field itself will always display on registration forms, but any goal field will be ignored if this option is not enabled)
☒ Yes, this participation type involves raising money

6. Minimum Fundraising Goal:
Defines a minimum monetary amount that each participant must agree to raise for this event (leave blank if there is no minimum)

[Next](#) or [Cancel](#)

Describe this Participation Type for participants

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

Selecting Type Options

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
 - a. Identify Type
 - b. Select Type Options**
 - c. Select Registration Info
 - d. Customize Waiver
 - e. Add Banner Image
 - f. Include Upsells
 - g. Include Questions
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

1. **Security Category:**
Controls which registrants will have this participation type displayed on their registration forms (the it on all registration forms)
General ☒
2. **Promotion Code:**
Defines a promotion code (letters and/or numbers) to restrict registration for this participation type
3. *** Availability:**
Determines if this participation type is available for selection on registration forms
☒ Active (available for registrants to select)
☐ Inactive (not yet available for registrants to select)
4. **Race Number Generation:**
Determines if registrants of this participation type will be assigned race numbers, and if so, the the assigned numbers should increase or decrease in value from the starting number
☒ Do Not Generate Race Numbers
☐ Generate Increasing Numbers
☐ Generate Decreasing Numbers
 Start Generating Numbers From:
5. **Notification List**
List of email addresses to be notified when anyone registers with this participation type.

Next or Cancel

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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

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
 - a. Identify Type
 - b. Select Type Options
 - c. Select Registration Info**
 - d. Customize Waiver
 - e. Add Banner Image
 - f. Include Upsells
 - g. Include Questions
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

1. **Constituent Information:**
Defines the constituent information fields to display on the registration form for that registrants are required to complete (Name and Email address are always required)

Participant Information	Primary Requested	Primary Required	Secondary Requested	Secondary Required
Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Middle Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Suffix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional Suffix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employer Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Honoree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Determines if the email preference options display on the registration form for automatically be opted-in to receive one or both types of email

Mail Preferences	Requested	Opt-in by Default
Email Opt-In	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Postal Opt-In	<input type="checkbox"/>	<input type="checkbox"/>

Next or Cancel

Determine which fields you would like requested and/or required

Secondary fields will appear only if you are allowing multiple registrations

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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.

40


v. 5.4 Rev 01/09

Customizing the Waiver

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
 - a. Identify Type
 - b. Select Type Options
 - c. Select Registration Info
 - d. Customize Waiver**
 - e. Add Banner Image
 - f. Include Upsells
 - g. Include Questions
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish


1. Participant Waiver:
 Determines if registrants will not be allowed to continue if they do not agree to

☒ **Yes, participants must agree to a waiver for this participation type**



2. Waiver Text:
 Defines the content of the waiver

I understand that my consent to these provisions is given in consideration of the acceptance of this registration and for being permitted to participate in this event.

 I am a voluntary participant in this event and in good physical condition. I know that this event is a potentially hazardous activity and I hereby assume full and complete responsibility for any injury or accident which may occur during my participation in this event or while on the premises of this event, and I hereby release and

Next
or Cancel


Enter waiver text if required for this participation type

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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.


Adding a Banner Image

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
 - a. Identify Type
 - b. Select Type Options
 - c. Select Registration Info
 - d. Customize Waiver
 - e. Add Banner Image**
 - f. Include Upsells
 - g. Include Questions


1. Participation Type Image:
 Adds a banner image to display with this participation type


You can use an image that was previously uploaded...

Images must be .gif, .jpg, or .png files. Files with a .jpg or .png type will be automatically resized to fit in a 500 x 400 pixel space. The maximum acceptable file size is 2 Mib.



Next
or Cancel

Image appears next to the Participation Type

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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.

Including Upsells

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
a. Identify Type
b. Select Type Options
c. Select Registration Info
d. Customize Waiver
e. Add Banner Image
f. Include Upsells

This is the list of Upsells associated with this TeamRaiser. To include the Upsell as an option for this participation type, click its Include checkbox.

Include	Name & Description	Display Type
No Registration Upsells available		

[Next](#) [Save](#) or [Cancel](#)

Event upsells would appear here for you to select

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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.

Including Questions

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
a. Identify Type
b. Select Type Options
c. Select Registration Info
d. Customize Waiver
e. Add Banner Image
f. Include Upsells
g. Include Questions

[Add a Question](#)

This is the list of Optional Questions that can be displayed on the registration pages for this Participation Type. The Include This Question checkbox for each question to be displayed on the registration form should contain a checkmark. Arrange the display order of the questions using the Order column.

Questions	Actions	Order	Question type	update constituent	required	include this question
No Questions Available						

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

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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

1. Identify Team/Raiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
 a. Identify Type
 b. Select Type Options
 c. Select Registration Info
 d. Customize Waiver
 e. Add Banner Image
 f. Include Upsells
 g. Include Questions

Add a Question

This is the list of Additional Questions that can be displayed on the registration pages for this Participation Type. The Include This Question checkbox for each question to be displayed on the registration form should contain a checkmark. Arrange the display order of the questions using the Order column.

- Additional Questions -

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

Questions	Actions	Order	Question Type	Update Constituent	Required	Include this Question
This is my first time to run the ship Towards Rec...	Edit Delete	<input type="text" value="1"/>	YES/NO	NO	NO	<input checked="" type="checkbox"/>

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

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

Additional questions
for this Participation
Type may be added

To add additional 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

Managing Autoresponders

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

- **Autoresponders (Participant)**
 - ▶ Thank you for forming a team
 - ▶ Thank you for registering
 - ▶ Someone made a donation on your behalf
 - ▶ Someone joined your team
- **Autoresponders (Donor)**
 - ▶ Thank you for your gift
 - ▶ Thank you for your offline gift

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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.

Creating Content

Dear **SiteAdmin**

We are so excited that you will be participating in the Step Towards Recovery!

The first thing you should do is to visit your **Participant Center**, where you can:

- Personalize your individual page;
- Send email to friends to raise money; and;
- Track your fundraising progress on a regular basis.

Save this email so you'll always remember your login information.

username: **admin**

password: (administrator password masked out for security reasons)

Sincerely,
Step Towards Recovery Event Manager

Step Towards Recovery 2007
Step Towards Recovery 2008
Virtual Walkathon

Options
Insert
Insert
Options
Insert

Page: Greeting Page
Use: Greeting Page
Join a Team Page
Start a Team Page
Participate as an Individual Page
Team or Individual Search Page
Participants Personal Page
Participant Center
Participant Center Email
Company List
Team List
Top Participant List

Include User Name and Password personalizations in autoresponder

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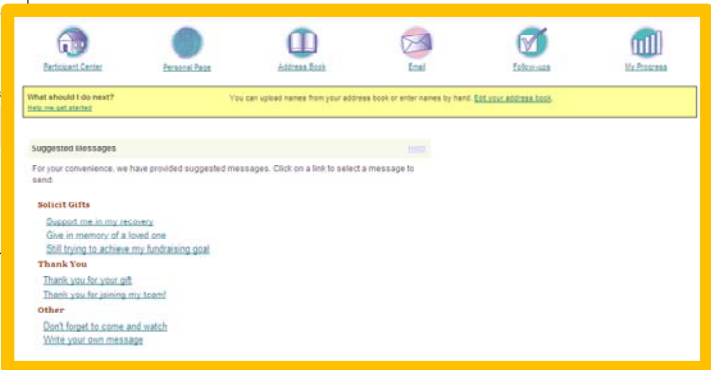
To create a link to the Participant Center, highlight the text to be linked, select **TeamRaiser**, from the **Links** drop-down menu, select **Options** next to the correct event, then select **Participant Center** from the **Page** drop-down menu. You will also want to include the participant's User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

Suggested Messages


Customizing Suggested Messages

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. **Customize Suggested Messages**
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

- Sample Solicitation
- Sample Thank You
- Blank



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

Adding Suggested Messages

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

Add a Message

This is a list of Suggested Message templates that participants can send from their Participant Center to appeal for support, recruit teammates, personally thank donors, and so on. Providing templates with suggested content may make it easier for participants.


Note: Use Add a Message to create each new message template. Do not edit the Blank Message (which is used for a Tell-A-Friend message) subject or content unless you want the information inserted to be in all messages that access this template. ([Help](#))

Message Name	Actions	Type	Subject
Blank Message	Edit Delete	Other	

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

[Next](#) or [Cancel](#)

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

Identifying Messages

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
 a. Identify Message
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

*** 1. Suggested Message Template Name:**
Identifies this template in the Suggested Messages List here and in the Participant Center
Sample Appeal

*** 2. Message Type:**
Specifies how this message will be grouped in the Suggested Messages List for
Solicit Gifts

*** 3. Constrain Message Stationery:**
Assigns this stationery to this suggested message. If you do not select a Stationery, p
-- None Selected --

*** 4. Suggested Message Subject:**
Defines the subject line that displays
Help Me Help Others in the Step Towards Recovery

5. Subject Editing:
Determines if participants can modify the subject
☐ Make the Message Subject
☐ Allow participants to modify the Message Subject

*** 6. Suggested Message Body Content:**
Defines the text of the message that participants can use to accomplish a task such as sending a reminder

7. Message Body Editing:
Defines how participants can modify the text in the Message Body
☐ Make the Message Body text read only (participants cannot modify it)
☐ Make the Message Body text read only but allow participants to add to it
☐ Allow participants to modify the Message Body text

Finish or Cancel

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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

Customizing TeamRaiser Pages

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
 a. TeamRaiser Pages
12. Customize Event URL
13. Test Drive
14. Publish

■ TeamRaiser Pages (Registration)

Greeting Page Thank You Page

■ TeamRaiser Pages (Participant)

Home Page (Participant Center) Default Personal Page Default Team Page Default Company Page

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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.

TeamRaiser Pages

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
8. Manage Stationary
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
 - a. TeamRaiser Pages
12. Customize Event URL
13. Test Drive
14. Publish

Related Actions

- Configure Navigation Bar
- Customize Wrapper and Styles
- Select Banner

This is a list of default pages that display to site visitors, donors, and participants for this TeamRaiser. Use the Configure action to customize elements, and add content to a default page. Click the Custom Pages tab to create a new event page. Use the Related Actions to configure a Page Wrapper, or Style Sheet for the default and custom pages, and to place a banner image on the pages.

Page Name	Actions	Description
Greeting	Configure	Greeting
Find a Participant	Configure	Find a Participant
Team Selection	Configure	Team Selection
Team Password	Configure	Team Password
Participation Options	Configure	Participation Options
Returning Participant Login	Configure	Returning Participant Login
Registration Information	Configure	Registration Information
Secondary Registration Information	Configure	Secondary Registration Information
Waiver	Configure	Waiver
Registration Summary	Configure	Registration Summary
Billing Information	Configure	Billing Information
Confirmation	Configure	Confirmation
Thank You	Configure	Thank You
Home Page	Configure	Home Page
Default Personal Page	Configure	Default Personal Page
Company List Page	Configure	Company List Page
Default Company Page	Configure	Default Company Page
Team List Page	Configure	Team List Page
Default Team Page	Configure	Default Team Page
Top Participants List Page	Configure	Top Participants List Page

[Next](#)
[Save](#)
[or Cancel](#)

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

Greeting Page

Choose from available status indicators for the Greeting Page

Status Indicator 1

Step Toward Recovery Campaign Progress

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

Title: Step Toward Recovery
Style: Donation Form Status
Rank by: Dollars Raised

[Choose](#)

Status Indicator 2

Top Teams

Scrolling list of names will appear here

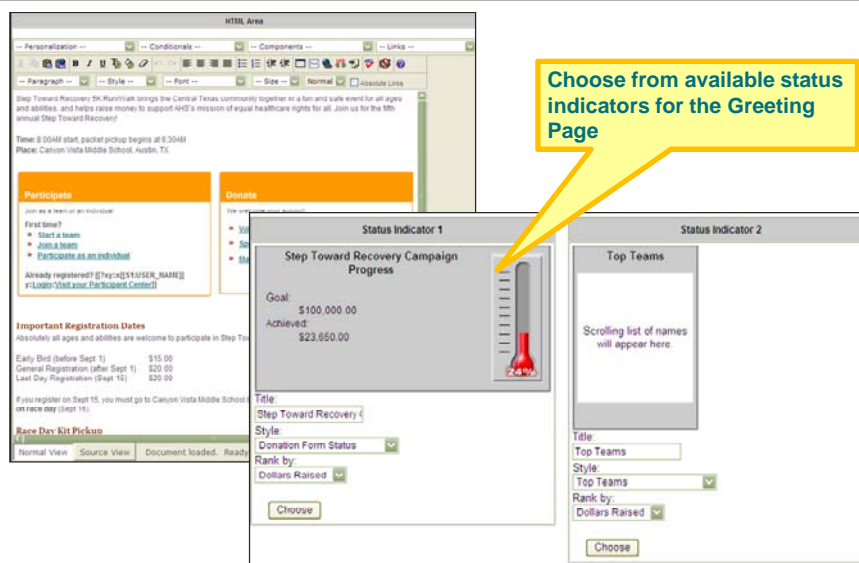
Title: Top Teams
Style: Top Teams
Rank by: Dollars Raised

[Choose](#)

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

Greeting Page

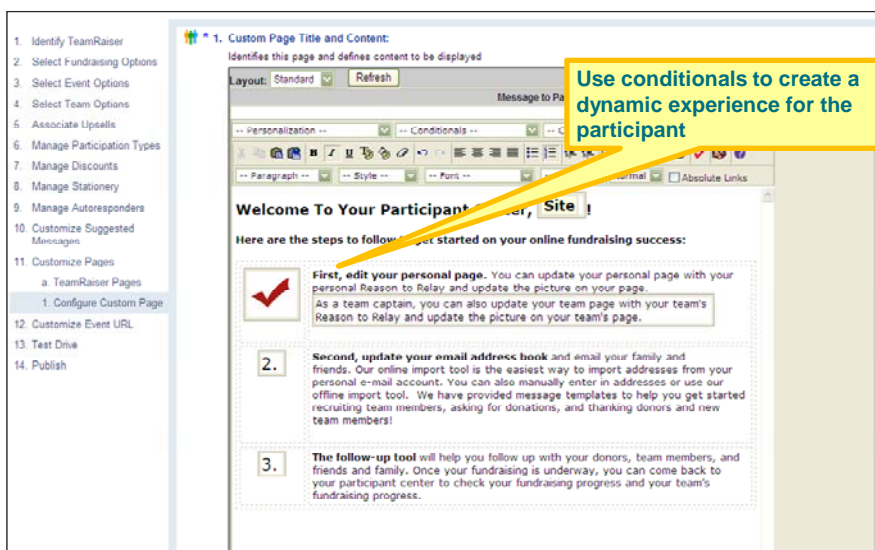


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On the Thank You page, be sure to include a prominent link to the Participant Center and clearly guide the participant to the next steps.

Home Page (Participant Center)



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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

Layout: Single Photo/Status left edge Style: Default Refresh

Page Title

Welcome to my Personal Page

Donate Button

You can use an image that was previously uploaded...

Search the Image Library

or upload an image from your computer:

1. Prepare your image.
Images must be .gif, .jpg, or .png files. The maximum acceptable file size is 512 Kb.

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

Browse...

3. Click the upload image button.
Upload Image

Status Indicator

Participant's name will go here

Body Text

Why I am taking the step...

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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

Create a new Custom Page Refresh List

The following pages can be displayed to constituents who visit this TeamRaiser. If you have configured pages to the TeamRaiser's navbar.

- TeamRaiser Pages - - Custom Pages -

Name

Next Save or Cancel

1. Custom Page Title and Content:
Identifies this page and defines content to be displayed

Required Fields

Page Name: Frequently Asked Questions

Page Body

Personalization Conditional Components Link

Paragraph Style Font Size Normal Absolute Link

Frequently Asked Questions

1. How do I register as a walker, runner or volunteer?

2. What is a Participant Center?

3. How can I best achieve online fundraising success?

4. What is a team?

5. How do I create a new team online?

6. How do I join an existing team?

7. How do I view another team's page?

8. How do I sponsor a team?

Normal View Source View Search: Match Case Find Find next

Document loaded. Ready.

Finish Save or Preview or Cancel

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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.

Custom Pages

- TeamRaiser Pages - - Custom Pages -

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

Name	Actions
Frequently Asked Questions	Edit Copy

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

[Next](#) [Save](#) or [Cancel](#)

Custom pages appear in the TeamRaiser link drop-down list

Page: Greeting Page

TeamRaiser Pages

- Greeting Page
- Participant Center
- Participant Center Email
- Participant's Personal Page
- Team or Individual Search Page
- Join a Team Page
- Participate as an Individual Page
- Start a Team Page
- Company List
- Team List
- Top Participant List

Custom Pages

- Frequently Asked Questions

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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

Customizing the Event URL

1. Identify TeamRaiser
2. Set Event Title
3. **1. Customized URL for the event Greeting page:**
4. Defines a shortcut Web address that displays the event Greeting page. (In addition to letters and numbers, the URL can contain only the periods, dash, and underscore special characters).
5. A
6. M
7. M
8. M Next Save or Cancel
9. Manage Autoresponses
10. Customize Suggested Messages
11. Customize Page
12. **Customize Event URL**
13. Test Drive
14. Publish

The DNS display name can be changed on the *Edit Advanced Options Step 3, section C, of the Process Navigator*

Use shortcut URL on marketing materials



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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

Test Driving

1. Identify TeamRaiser

2. Select Fundraising Options

3. Select Event Options

4. Select Team Options

5. Associate Upsells

6. Manage Participation Types

7. Manage Discounts

8. Manage Stationery

9. Manage Autoresponders

10. Customize Suggested Messages

11. Customize Pages

12. Customize Event URL

13. Test Drive

14. Publish

1. Test Promotion Code:
Identifies a promotional code that will be available to certain registrants

2. Test Account:
Identifies the username for a test account, or actual constituent account, that meets the conditions you want to test (leave blank to simulate the experience of a site visitor who is not logged in)

3. Test Address for Autoresponders:
Identifies the email address to which autoresponders will not be sent to the address associated with the test account (leave blank if they are they it)

devnull@convio.com

4. Additional Test Arguments:
Identifies a string of up to 255 characters that can be used to pass additional URL arguments to test (arguments should be in the form "&name=value")


5. Launch Test Drive:
Displays the TeamRaiser in a Preview window for you to simulate the experience of registering for and donating to the TeamRaiser event (use 4111-1111-1111-1111 in the Credit Card Number field and 111 in the CVV field)

Launch Test

Next or Cancel

Test drive your event to make sure everything is working and looking as it should

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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

Publishing

1. Identify TeamRaiser
2. Set Event Details
3. Set Event Dates
4. Set Event Location
5. Assign TeamRaiser
6. Manage TeamRaiser
7. Manage TeamRaiser
8. Manage TeamRaiser
9. Manage TeamRaiser
10. Customize TeamRaiser
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

1. Status:
Determines if people can register for this TeamRaiser, donate to it, or both (Unpublished TeamRaisers are not available for online registrations or donations, but may have some management tasks available)

Accepting Registrations and Gifts

Unpublished

Accepting Registrations Only

Accepting Registrations and Gifts

Accepting Gifts Only


Closed

http://bvt101.convio.com/site/TR?tr_id=1000&pg=entry

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

TeamRaiser to site visitors. You can copy and paste this URL in other sources to direct

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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

Copying Donation Campaign

The screenshot shows the 'Donation Management' interface. Under the 'Campaigns' tab, a table lists the 'Step Toward Recovery 2008 Donation Campaign'. The 'Copy' button is circled in yellow. Below, the 'Copy a Campaign' process is shown, with a yellow callout box pointing to the 'Name' field, stating 'Rename the campaign'.

Donation Management

Online Giving Pending Contributions Sustaining Gifts Designated Gifts Memberships

Campaigns

Step Toward Recovery 2008 Donation Campaign	Manage	Active	General
Step Toward Recovery 2008 created on Jan 30, 20...	Edit		
Campaign ID: 1981	Copy		

Donation Management

Online Giving Pending Contributions Sustaining Gifts Designated Gifts Memberships

Campaigns > Copy a Campaign

Process Navigator

1. Copy a Campaign

* 1. Name:

The campaign name identifies the campaign to administrators

Step Towards Recovery 2009

Finish or Cancel

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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.

Copying Event and Linking to Previous Year

The screenshot shows the 'TeamRaiser' interface. Under the 'Events' tab, a table lists the 'Step Towards Recovery 2008' event. The 'Copy' button is circled in yellow. Below, the 'Copy a TeamRaiser Event' process is shown, with a yellow callout box pointing to the 'Previous Event Association' dropdown, stating 'Don't forget to link to previous year's event'.

Step Towards Recovery 2008

Edit Copy Archive Manage

Closed

Published Date: N/A

Unpublished Date: N/A

1. Copy a TeamRaiser Event

* 1. Administrative Name:

Uniquely identifies this TeamRaiser in the TeamRaiser list

Step Towards Recovery 2009

Finish or Cancel

6. Previous Event Association:

Links this event to a previous event to provide returning participants with access to their Personal Page and donation history (Note that this will provide additional report data as well)

Step Towards Recovery 2008

Don't forget to link to previous year's event

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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

Managing Participants

TeamRaiser Management

The screenshot shows a table with the following data:

TeamRaiser Name	Action	Status	Type	Fiscal Year	Event Date
Step Towards Recovery 2007	Edit Copy Manage	Accepting Registrations and Gifts Published Date: N/A Unpublished Date: N/A	Primary: Step Towards Recovery	2007	September 16, 2007
Step Towards Recovery 2008	Edit Copy Manage	Accepting Registrations and Gifts Published Date: N/A Unpublished Date: N/A	Primary: Step Towards Recovery	2008	September 18, 2008
Step Towards Recovery 2009	Edit Copy Archive Manage	Unpublished Published Date: N/A Unpublished Date: N/A	Primary: Step Towards Recovery	2008	September 30, 2008

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

Page 1 of 1 [To Page](#)

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

TeamRaiser Management

TeamRaiser Administration

[TeamRaiser List](#) | **[Participants](#)** | [Teams](#) | [Local Companies](#) | [Unconfirmed Gifts](#) | [Event Gifts](#) | [Coaching Emails](#) | [Event Managers](#) | [Library](#)

Step Towards Recovery 2007

[Register a Participant](#) | [Manage Unconfirmed Gifts](#)

Participant Search

First Name:
 Last Name:
 Personal ID Number:
 Employer:
 ZIP / Postal Code:
 Team Name:
 Team Company:
 Registration Status: ☒ All ☐ Active ☐ Inactive

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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.

Participant Search

TeamRaiser Administration

[TeamRaiser List](#) |
 [Participants](#) |
 [Teams](#) |
 [Local Companies](#) |
 [Unconfirmed Gifts](#) |
 [Event Gifts](#) |
 [Coaching Emails](#) |
 [Event Managers](#) |
 [Library](#)

Step Towards Recovery 2007

[Register a Participant](#) |
 [Manage Unconfirmed Gifts](#)

Participant Search

First Name:

Last Name:

Personal ID Number:

Employer:

ZIP / Postal Code:

Team Name:


Team Company:

Registration Status:
☒ All
☐ Active
☐ Inactive

Fill in at least one search field

Search in one or all TeamRaiser events for an individual participant

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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

TeamRaiser List | **Participants** | Teams | Local Companies | Unconfirmed Gifts | Event Gifts | Coaching Emails | Event Managers | Library

Step Towards Recovery 2008

[Register a Participant](#) | [Manage Unconfirmed Gifts](#)

Participant Search

First Name:

Last Name:

Personal ID Number:

Employer:

ZIP / Postal Code:

Team Name:

Team Company:

Registration Status: ☒ All ☐ Active ☐ Inactive

Participant List

Records 1 - 1 of 1 [First](#) | [Discussion](#) | [Load](#) | [Last](#)

Name	Email	Team	Team Company	TeamRaiser Name
Oliver Alex	alex@convio.com	Team Alex (captain)	IBM	Step Towards Recovery 2008

Records 1 - 1 of 1 [First](#) | [Discussion](#) | [Load](#) | [Last](#)

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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

Participant Profile

The screenshot shows the 'Participant Profile' page for John Smith. The page is divided into several sections with callouts indicating available actions:

- Registration Information:**
 - Edit C360 profile:** Points to the top right of the profile section.
 - Edit Contact Info:** Points to the 'Edit Contact Info' link.
 - Change team membership:** Points to the 'Change team membership' link.
 - Change registration details such as participation type and fundraising goal:** Points to the 'Edit registration information' link.
 - View or edit their Personal Page:** Points to the 'View' and 'Edit' links under 'Personal Page'.
- Gift History:**
 - Enter Offline Gift:** Points to the 'Enter Offline Gift' link.
 - Enter offline gifts:** Points to the 'Enter Offline Gift' link.

The 'Registration Information' section includes the following details:

- Name: John Smith
- Email: sachin@convio.com
- Status: Active (Make Inactive)
- Fundraising Goal: \$300.00
- Total Reported: \$50.00 (16%)
- Total Confirmed: \$50.00 (16%)
- Personal Page: View Edit Public / Default Make Private
- Team Page:

The 'Gift History' section includes a table with the following data:

Gift Type	Action	Name	Email	Date	Amount	Payment Method
Online		Smith, John	sachin@convio.com	Jul 9, 2004	\$50.00	Credit Card

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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

Editing Registration Information

Name and Address Information Edit Contact Record

Name: John Doe
 Email: demo@convio.com
 Street 1: 2703 Salado Street
 Street 2:
 City: Austin State / Province: TX ZIP / Postal Code: 78705-3913
 Country:

Emergency Contact Information

Name:
 Phone:

Gift Notification Information

☐ This participant shall receive gift notification emails

Team Information Change team membership

Team Name: Team Alex (captain)
 Team Company: IBM

Edit This Team

Use this section to change information about this team. Changes made here do not reassign.

Team Name: Team Alex
 Team Company: IBM
 Division: Corporate ☒
 Company Coordinator: ☐ Make this participant the coordinator for his or her company. Note that a company can only have one coordinator and selecting company coordinator if one has already been set.

Participation Information

* Participation Type: ☒ 5K Run
 Fundraising Goal: \$15,000.00

Registration Information

Registration Fee: \$20.00
 Additional Gift: \$240.00
 Total: \$260.00

Additional Information Edit Information

Questions	Responses
1) How many times have you participated in the Step Towards Recovery in the past?	4
2) You will receive a t-shirt with your registration packet. What t-shirt size would you prefer?	Medium

Additional Information

Athletic Jersey: \$22.00
 Buy a special offer Jersey for "Steps towards recovery"
☐ Yes, I'd like to order this apparel

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

Change Team Membership

Step Towards Recovery 2007

Assign the participant to an existing team Or choose another option below:
Make the participant the captain of a new team

Participant Name: John Smith
 Team Name: Individual participation

Team Search

To find a team, enter the team name or the first few letters of the team name in the search results returned.

Team Name: Search for a Team
 Team Company:
 Team Division: any division

Team List

Click on a team name to assign the participant to the team.

Records 1 - 18 of 18

Name	Team Captain	Friends
All Development	Ollie Dantell	
Austin Caretakers	Andrew Bennett	
Austin Caretakers2	Anthony Burnett	
Badgers	Kendall Collett	Friends
Convio	Kathy Bedoya	Corporate
Convio Services	Donna Wilkins	Corporate
Corey's Team	Corey Bradford	Family

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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

Registration Information

Mr. Paul Broadus Joiner
devnull+1000292@convio.com

[Edit Contact Info](#)

Status: **Active** [Make Inactive](#)

User Name: pbjoiner

Fundraising Goal: \$300.00

Participation Type: Volunteer Walker

Total Reported: \$190.00 (63%)

Registration Type: Online

Total Confirmed: \$190.00 (63%)

Previous Participant: N/A

Team Name: Keepin' it Together (captain)

You cannot change the team membership of someone currently flagged as a team captain. You can, however, select another team member to be the captain of this team and then change this person's team membership.

[Edit registration information](#)
[Refund](#)

Personal Page: [View](#) [Edit](#) Public / Configured [Make Private](#)

Team Page: [View](#) [Edit](#)

Company Page:

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.

Registering Participants

TeamRaiser List Participants Profile **Registration** Teams Local Companies Unconfirmed Gifts Event Gifts Coaching Emails

Step Towards Recovery 2007

* = Required Fields Find Participant: Go

[Set Batch ID](#)

Name and Address Information Find Contact: Go


* Name: Title First Middle Last Professional Suffix

Email:

Street 1:

Street 2:

Name	Action	E-mail Address	User Name	Address	Phone	Already Registered
Smith, Alejandra	select	devnull+1000981@convio.com	user982	1707 Miller Rd. Custer, Nicaragua	N/A	No
Smith, Alexandra	select	devnull+1000839@convio.com	user840	2812 Pearl Street Austin, TX 78705 United States	N/A	No
Smith, Andy	select	devnull+1000503@convio.com	user504	12226 N F M 620 Austin, TX 78750 United States	N/A	No

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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.

Registering Participants

Registration Information

Registration Fee:
Specify whether you received the fee established for the selected Participation Type. If you received a different amount for registration, enter that amount.

☒ Standard Registration Fee: \$20.00

☐ Enter Different Registration Fee:

Additional Gift: \$0.00

Total: \$20.00

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


Additional Information

Athletic Jersey:
Buy a special offer Jersey for "Steps towards recovery"
☐ Yes, I'd like to order this upsell
Price: Athletic Jersey \$22.00

Payment Method
Fill in one of the payment information sections below, depending on the type of payment to be recorded.
Use the Record Cash Payment section for cash payments or if no money was received.

Record Cash Payment

Record Check Payment
Check Number:

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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

Team Management

Manage TeamRaisers

TeamRaiser List Participants **Teams** Local Companies Unconfirmed Gifts Event Gifts Coaching Emails

Step Towards Recovery 2007

This is a list of teams that have been formed for this TeamRaiser. Use the Manage action to view information about the team and its members or record a donation to the team.

Records 1 - 20 of 20 First Previous Show All Page 1 of 1 To Page

Name	Action	Team Captain	Company	Team Goal
AIX Development	Manage	Tim Dantell devnull+gill@convio.com	IBM	\$1,000.00
Austin Caretakers	Manage	Andrew Johnson devnull+1000953@convio.com		\$1,000.00
Austin Caretakers2	Manage	Anthony Burnett devnull+1000958@convio.com		\$5,000.00
Badgers	Manage	Kendall Collett devnull+1000273@convio.com		\$10,000.00

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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.

Team Management

TeamRaiser List Participants Teams Local Companies Unconfirmed Gifts Event Gifts Coaching Emails Event Managers Library

Step Towards Recovery 2007 > Badgers

Refresh this page

Related Actions

- Edit Team Details
- Record Team Donation
- Set Batch ID

This is a summary that shows the information about the Gifts and Members of the selected team. Use the Record Team Donation action to record a donation to the team. Use the View/Edit action to see information about the donor, edit the name to display on the Team Gift List, and the Members tab to see the team roster and work with the TeamRaiser profiles of the members.

Badgers

Captain: Dr. Kendall Collett
100 Park Place
Austin, TX 78730
devnull+1000273@convio.com
512/555-1212

Active Members: 1
Team Goal: \$10,000.00
Confirmed Gifts: \$440.00 (4.40%)
Total Gifts: \$440.00 (4.40%)

Gifts Members

Records 1 - 3 of 3 First Previous Next Last

Name	Action	Gift Type	Gift Date	Amount	On Behalf of
Kendall Collett	View/Edit	Online (Credit Card)	12/13/2001	\$270.00	Kendall Collett
Amy Mecozzi	View/Edit	Online (Credit Card)	12/13/2001	\$125.00	Kendall Collett
Troy Walker	View/Edit	Online (Credit Card)	12/13/2001	\$45.00	Kendall Collett

Records 1 - 3 of 3 First Previous Next Last

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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.

Team Management

TeamRaiser List

Participants

Teams

Local Companies

Unconfirmed Gifts

Event Gifts

Coaching Emails

Event Managers

Libra

Step Towards Recovery 2007 > Keepin' it Together

Related Actions

Record Team Donation

This page shows information, donations, and members for the selected team. Use the Record Team Donation link to enter a call team. In the Gifts list, use the View/Edit action to see information about a gift's donor, edit the name to display on the Team Gift check gift. Use the Members tab to see the team roster and work with the TeamRaiser profiles of the members.

Keepin' it Together

Captain

Mr. Paul Broadus Joiner

1521 A Southport Dr

Austin, TX 78704

devnull+1000292@convio.com

512.448.9943

Active Members: 4

Team Goal: None

Confirmed Gifts: \$590.00

Total Gifts: \$590.00

- Gifts -

- Members -


Records 1 - 4 of 4 [First](#) [Previous](#) [Next](#) [Last](#)

Name	Action	Email
Paul Joiner(captain)	Edit	devnull+1000292@convio.com
Jane Smith	Edit	jsmith@convio.com
John Smith	Edit	sachin@convio.com
Sachin Wadhawan	Edit	sachin+trive@convio.com

Records 1 - 4 of 4 [First](#) [Previous](#) [Next](#) [Last](#)

Access the Participant's Profile

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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 Management: Participant Profile

The screenshot shows the 'Participant Profile' page for 'Mr. Paul Broadus Joiner'. The page includes tabs for TeamRaiser List, Participants, Profile, Teams, Local Companies, Unconfirmed Gifts, Event Gifts, Coaching Emails, and Event. The 'Registration Information' section shows details like User Name, Participation Type, and Fundraising Goal. The 'Gift History' section at the bottom lists recent gifts with columns for Gift Type, Name, Email, Date, and Amount. Two callouts are present: one pointing to the 'Gift History' table with the text 'View all gifts or filter by type', and another pointing to the 'Enter Offline Gift' button with the text 'Enter new offline gifts'.

Gift Type	Name	Email	Date	Amount
Online	Anderson, Mike	denrull+1000293@convio.com	Dec 14, 2001	\$75.00
Offline Confirmed	Armstrong, Cliff (Uncle Cliff)	cliff@convio.com	Dec 14, 2001	\$20.00
Online	Joiner, Paul	denrull+1000292@convio.com	Dec 14, 2001	\$40.00
Online	Mackey, Chris	denrull+1000295@convio.com	Dec 14, 2001	\$45.00

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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.

Confirm/Reject Offline Gifts

Confirm, Edit or Reject

Offline Unconfirmed	  	Doe, Jane	devnull+1000260@convio.com	Apr 17, 2008	\$100.00 Check
Offline Unconfirmed	  	Rogers, Buck (Buck Rogers)		Apr 17, 2008	\$50.00 Check

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When you receive a check or cash from a participant, you can confirm the gift by clicking 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.

Unconfirmed Gifts Tab



Unconfirmed Gifts				
Records 1 - 4 of 4 First Previous Next Last				
			Page 1 of 1	To Page
Participant	Action	Donor	Team Name	Amount
Phillip Capps	Confirm Reject	Amy Mecozzi	Convio	\$100.00
Rich Levy	Confirm Reject	Amy Mecozzi	Convio	\$100.00
Jeff Mills	Confirm Reject	Field	Pearson's Posse	\$40.00
Alex Oliver	Confirm Reject			\$25.00

Confirm gifts when received

Reject gifts not received

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

Offline Participant Gifts

The screenshot shows the Convio interface for managing participant gifts. The top navigation bar includes links for TeamRaiser List, Participants, Teams, Local Companies, Unconfirmed Gifts, Event Gifts, Coaching Emails, and Event Managers. The main content area is titled 'Step Towards Recovery 2007' and features a 'Process Navigator' with steps: 1. Choose Donor, 2. Configure Gift. A yellow arrow points from the 'Enter Offline Gifts' link in the 'Gift History' table to the '1. Choose Donor' step in the Process Navigator. The 'Gift History' table lists gifts with columns for Gift Type, Action, Name, Email, Gift Date, and Gift. The 'Enter Offline Gifts' link is highlighted with a yellow circle.

Gift History

Gift Type	Action	Name	Email	Gift Date	Gift
Online		Anderson, Mike	demult+100293@convio.com	Dec 14, 2001	\$75.00 Credit Card
Offline Confirmed		Armstrong, Cliff (Uncle Cliff)	cliff@convio.com	Dec 14, 2001	\$20.00 Check
Online		Joiner, Paul	demult+100292@convio.com	Dec 14, 2001	\$40.00 Credit Card
Online		Mackey, Chris	demult+100295@convio.com	Dec 14, 2001	\$45.00 Credit Card

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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.

Offline Event Gifts

The screenshot shows the Convio interface for managing event gifts. The top navigation bar includes links for TeamRaiser List, Participants, Teams, Local Companies, Unconfirmed Gifts, Event Gifts, Coaching Emails, Event Managers, and Library. The 'Event Gifts' tab is highlighted with a yellow circle. The main content area is titled 'Step Towards Recovery 2007' and features a 'Related Actions' column with links: Record Event Donation, Set Batch ID, and Refresh this page. The 'Record Event Donation' link is highlighted with a yellow circle. Below the 'Related Actions' column, there is a table for 'Event Gifts' with columns for Name, Action, Gift Type, Gift Date, and Amount. The table currently shows 'No gifts.'

Event Gifts

Name	Action	Gift Type	Gift Date	Amount
No gifts.				

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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

TeamRaiser List Participants **Teams** Local Companies Unconfirmed Gifts Event Gifts Coaching Emails Event Managers Library

Step Towards Recovery 2007 > Badgers

Refresh this page

Related Actions

- ▶ Edit Team Details
- ▶ **Record Team Donation**
- ▶ Set Backlog

This is a summary that shows the information about the Gifts and Members of the selected team. Use the Record Team Donation action to record a new gift, use the View/Edit action to see information about the donor, edit the name to display on the Team Gift List, and the Members tab to see the team roster and work with the TeamRaiser profiles of the members.

Badgers

Captain
Dr. Kendall Collett
 100 Park Place
 Austin, TX 78730
 devnull+1000273@convio.com
 512/555-1212

Active Members: 1
Team Goal: \$10,000.00
Confirmed Gifts: \$440.00 (4.40%)
Total Gifts: \$440.00 (4.40%)

- Gifts - - Members -

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

Search Show All Page 1 of 1 To Page

Name	Action	Gift Type	Gift Date	Amount	On Behalf of
Kendall Collett	View/Edit	Online (Credit Card)	12/13/2001	\$270.00	Kendall Collett
Amy Mecozzi	View/Edit	Online (Credit Card)	12/13/2001	\$125.00	Kendall Collett
Troy Walker	View/Edit	Online (Credit Card)	12/13/2001	\$45.00	Kendall Collett

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

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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

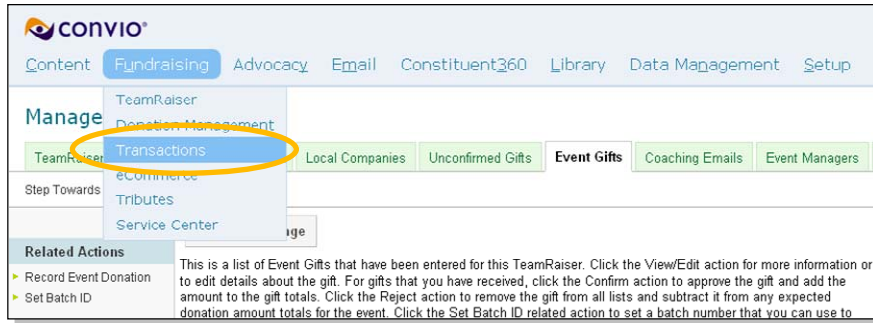
- Administrators with Transaction Management permissions can perform adjustments to monetary transactions
 - ▶ Some changes are irrevocable, such as the issuing of refunds
 - ▶ Ensure proper training regarding the software tools and your organization's business processes

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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

The screenshot shows the Convio Transaction Finder form. A yellow callout box with a speech bubble points to the search fields and contains the text: 'To refund a TeamRaiser registration, find the registrant using the first three search fields'. The form includes fields for 'Find transactions by:', 'First Name:', 'Last Name:', 'Email:', 'Find gifts made on behalf of someone, for example, TeamRaiser, Tributes:', 'First Name:', 'Last Name:', 'Find transactions:', 'Confirmation Code:', 'Amount Between:', 'Date Range:', and a 'Search' button.

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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

Transactions

Find a Transaction

Find transactions made by this donor:

First Name:
 Last Name:
 Email:

Find gifts made on behalf of someone, for example, TeamRaiser, Tributes:

First Name:
 Last Name:

Find transactions:

Confirmation Code:
 Amount Between: and
 Date Range: to

Transactions

Records 1 - 10 of 33 [Email](#) [Print](#) [List](#) [Last](#)

Constituent Info	Billing Info	Fundraiser/Event	Date	Type	Amount	Confirmation Code	Actions
Univert, Inc. info@univert.com	Univert, Inc. info@univert.com	Annual Fundraising Campaign	10/10/2008 11:43 AM	Rebates registration	\$10.00	101-1421-1-5702-7708	Record Refund
Zena, Brian brian@zena.com	Zena, Brian brian@zena.com	Annual Fundraising Campaign	10/10/2008 01:22 PM	Rebates registration	\$65.00	101-1421-1-5704-7708	Record Refund
Holmstrom, John johnd@holmstrom.com	Holmstrom, Mary mary@holmstrom.com	Annual Fundraising Campaign	10/07/2008 11:23 AM	Donation	\$500.00	101-1421-1-5723-7725	Record Refund Change Donor Change Soft Credit
Watkins, Grace grace@watkins.com	Watkins, Brian brian@watkins.com	Annual Fundraising Campaign	10/07/2008 11:21 AM	Donation	\$60.00	101-1421-1-5724-7726	Record Refund Change Donor Change Soft Credit
Shenck, Shannon shannon@shenck.com	Shenck, Annie annie@shenck.com	Annual Fundraising Campaign	10/07/2008 11:21 AM	Donation	\$60.00	101-1421-1-5725-7730	Record Refund Change Donor Change Soft Credit
Callins, Tim tim@callins.com	Callins, Mary mary@callins.com	Annual Fundraising Campaign	10/07/2008 11:21 AM	Donation	\$60.00	101-1421-1-5726-7732	Record Refund Change Donor Change Soft Credit

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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

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

Records 1 - 10 of 78 [First](#) [Previous](#) [Next](#) [Last](#)

Search Show All

Constituent Info	Billing Info	Fundraiser/Event	Date	Type	Amount	Confirmation Code	Actions
Wadhawan, Sachin sachin@trive@convio.com	Wadhawan, Sachin sachin@trive@convio.com		04/04/2007 12:28 PM	TeamRaiser registration	\$70.00	202-1021-20-4983-5748	Receipt Refund

Refund Transaction

You can use this page to make a partial or full refund for a donation transaction. Complete either the Partial or Full Refund section and then choose a Refund Method. Click Submit to process the refund.

TeamRaiser Registrations

Registration Name	Registration Fee	Extra Gift Amount	Upsells Total	Registration Total
Sachin Wadhawan	\$20.00	\$50.00	\$0.00	\$70.00
Total	\$20.00	\$50.00	\$0.00	\$70.00

Refund Processing

This transaction was paid with a credit card, and processed by the Refund Amount and then click Calculate.

Full Refund

☐ Refund the full \$70.00 transaction.

Partial Refund

Sachin Wadhawan (Primary Registrant)	Initial Charge	Refund Amount	Final Charge
Registration Fee	\$20.00	\$0.00	\$20.00
Additional Gift	\$50.00	\$0.00	\$50.00
Totals	\$70.00	\$0.00	\$70.00

Calculate the refund and final charge.

Refund Method

☐ Yes, process a refund to the same credit card.

☐ No, the participant has already been reimbursed or will be reimbursed offline. Just record the refund in the Convio database.

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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

Transaction Management

Transaction Search

Transaction: 202-1421-1-5391-7071 > Change Soft Credit

Process Navigator

1. Select Type

2. Select destination participant

3. Search Criteria

4. Confirm Changes

1. Select where you would like to change the soft credit for this gift?

Select from the options below to move this gift to a TeamRaiser participant, team, or event, or credit this gift to a Tributes fund.

- ☒ TeamRaiser Participant
- ☐ TeamRaiser Team
- ☐ TeamRaiser Event
- ☐ Tributes Fund

2. Search the corresponding list:

Once you have chosen where to move the credit for this gift, use the Search button to view the list that corresponds to your chosen

Search

Cancel

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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

Transaction Management

Transaction Search

Transaction: 202-1421-1-5391-7071 > Change Soft Credit

Process Navigator

1. Select Type

2. Search Criteria

3. Select destination participant

4. Confirm Changes

Enter at least one search criteria

You can search for participants by:

First Name:

Last Name:

Email:

Teamraiser Name:

Step Towards Recovery 2007

Next or **Cancel**

Transaction Search

Transaction: 202-1421-1-5391-7071 > Change Soft Credit to TeamRaiser Participant

Process Navigator

1. Select Type

2. Search Criteria

3. Select destination participant

4. Confirm Changes

Select the TeamRaiser Participant that you would like to credit with this gift

Use the list and search window to locate the TeamRaiser Participant that you would like to credit with this gift.

Records 1 - 20 of 33

Name	Action	Email	TeamRaiser Name
Bedoya, Kathy	Select	devnu+1000372@convio.com	Step Towards Recovery 2007
Bless, Karen	Select	sachin+1000372@convio.com	Step Towards Recovery 2007
Bradford, Corey	Select	devnu+1000372@convio.com	Step Towards Recovery 2007
Brennan, Molly	Select	devnu+1000372@convio.com	Step Towards Recovery 2007
Burnett, Anthony	Select	devnu+1000372@convio.com	Step Towards Recovery 2007
Clapps, Phillip	Select	devnu+1000372@convio.com	Step Towards Recovery 2007
Collett, Handal	Select	devnu+1000372@convio.com	Step Towards Recovery 2007
Daniel, Gill	Select	devnu+1000372@convio.com	Step Towards Recovery 2007
Egan, David	Select	sachin+1000372@convio.com	Step Towards Recovery 2007
Farr, Tim	Select	devnu+1000372@convio.com	Step Towards Recovery 2007
Hause, Kris	Select	kris@not.org	Step Towards Recovery 2007
Johnson, Andrew	Select	devnu+1000372@convio.com	Step Towards Recovery 2007
Jones, Paul	Select	devnu+1000372@convio.com	Step Towards Recovery 2007
Levy, Rich	Select	devnu+1000372@convio.com	Step Towards Recovery 2007
Mecozzi, Amy	Select	devnu+1000372@convio.com	Step Towards Recovery 2007

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Perform a search and select the participant from the list.

Changing Soft Credit to a Participant

Transaction Search

Transaction : 202-1421-1-5391-7071 > Change Soft Credit to TeamRaiser Participant

Process Navigator

1. Select Type
2. Search Criteria
3. Select destination participant
4. Confirm Changes

Confirm that soft credit for this gift will be reassigned correctly.

If the information below does not accurately reflect how you would like this gift to be credited, use the Previous button to make changes. If the information is correct, use the Finish button to complete the change of credit for this gift.

Existing Donation

Billing Name: Amber Cannon
Constituent Name: Amber Cannon
Transaction Date: January 21, 2008
Transaction Amount: \$120.00
Confirmation Code: 202-1421-1-5391-7071

Transaction: Click *Finish* to confirm

- Remove this credit from TeamRaiser participant Jean Anderson in TeamRaiser event Step Towards Recovery 2008.
- Assign this credit to TeamRaiser participant Anthony Burnett in TeamRaiser event Step Towards Recovery 2007.

or

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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

Manage Companies

TeamRaiser List
Participants
Teams
Local Companies
Unconfirmed Gifts
Event Gifts
Coaching Emails
Event

Step Towards Recovery 2007

Related Actions

Add a new company

This is a list of local companies associated with this TeamRaiser. To add a corporate gift from a company, status indicator from the Edit Gifts page to remove a company-given gift from the fundraising totals.

- Local Companies -

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Search


Show

Name	Action	Amount
Envio	<div style="border: 1px solid orange; border-radius: 10px; padding: 2px; display: inline-block;">Add new company</div> View Summary Edit Company Edit Primary Contact Edit Gifts Edit Company Page Delete Company	

 \$20,000.00 || Safeway | [View Summary](#) [Edit Company](#) [Edit Primary Contact](#) [Edit Gifts](#) [Edit Company Page](#) [Delete Company](#) | \$10,000.00 |

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

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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

The screenshot shows the 'Local Companies' tab in the Convio interface. The main content area displays a list of gifts for a specific company. The 'Related Actions' section on the left includes a link to 'Add a new gift'. The 'Gifts' table lists a 'Corporate Check' for '\$20,000.00'. The 'Action' column for this entry includes links for 'Edit Gift' and 'Delete'. The 'Total Amount Recorded' is '\$20,000.00' and the 'Adjust Thermometer Amount' is '\$3,000.00'. The 'Edit Thermometer Amount' link is highlighted. The 'Edit or delete existing gifts' callout points to the 'Edit Gift' and 'Delete' links in the table.

Type	Amount	Notes
Corporate Check	\$20,000.00	

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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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Manage Companies: Company Pages

TeamRaiser Administration

[TeamRaiser List](#)
[Participants](#)
[Profile](#)
[Teams](#)
[Local Companies](#)
[Unconfirmed Gifts](#)
[Event Gifts](#)
[Coaching Emails](#)
[Event](#)

Step Towards Recovery 2007

[Register a Participant](#)
[Find Participant](#)

[Set Batch ID](#)

Registration Information

Mr. Paul Broadus Joiner [Edit Contact Info](#) Status: **Active** [Make Inactive](#)
[devnull+1000232@convio.com](#)

User Name: pbjoiner Fundraising Goal: \$300.00
 Participation Type: Volunteer Walker Total Reported: \$440.00 (146%)
 Registration Type: Online Total Confirmed: \$440.00 (146%)
 Previous Participant: N/A
 Team Name: Keepin' it Together (captain)

You cannot change the team membership of someone currently flagged as a team captain. You can, however, select another team member to be the captain of this team and then change this person's team membership.

Team Company: Convio

[Edit registration information](#)
[Refund](#)

Personal Page: [View](#) [Edit](#) Public / Configured
 Team Page: [View](#) [Edit](#)
 Company Page: [View](#) [Edit](#)

Edit company pages from a participant profile

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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 within 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

Create emails for event managers to send to participants

Coaching Emails

Create a new message

Messages

Related Actions

Begin Message Delivery

Choose an audience or schedule message delivery by clicking the "Begin Delivery" action. If a message is in Draft state, it will have to be approved before you can begin delivery.

- Message List - - Delivery List - - Report List -

test Search Show All Page 0 of 0 To Page

Message	Actions	Status	Type	Tentative Schedule	Last Modified
There are no editable messages available.					

☒ **Show Archived Coaching Email Messages**
Determines if archived Coaching Email Messages are displayed in the list

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

Coaching Emails

TeamRaiser List Participants Teams Local Companies Unconfirmed Gifts Event Gifts Coaching Emails Event Managers Libr

Messages > Create a new message

Process Navigator

1. Message Information
2. Envelope
3. Stationery
4. HTML Content
5. Plain Text Content
6. Send Review Email
7. Approve

1. Enter a name for this message:
The message name is used internally. It will only appear to you and other administrators. Your constituents will not see this.

2. Enter a description for this message:
The message description is used internally for further identification. Your constituents will not see this.

3. Select a type for this message:
You may assign an existing type for this message or create a new type if desired. Message types are useful for grouping similar messages. Your constituents will not see this.

☐ Choose an existing value
☐ Enter a new value

4. Tentative Schedule Date
You can specify a tentative schedule for your message. A message with a tentative schedule will appear on the Email Calendar before any deliveries are scheduled. Once a message has scheduled deliveries, those deliveries will appear on the Email Calendar instead of the message.

☐ Yes, specify a tentative schedule date.
Oct 30 2008 12:00 am

5. Associate this message with an Advocacy Action Alert:
If this message is a call to action on a specific Action Alert, you can associate them together for reporting purposes. This lets you track your advocacy efforts from end to end. Your constituents will not see this.

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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.

Coaching Emails

Manage TeamRaisers

TeamRaiser List Participants Teams Local Companies Unconfirmed Gifts Event Gifts Coaching Emails Eve

Messages > The Race Is Only 30 Days Away

Process Navigator

1. Message Information
2. Envelope
3. Stationery
4. HTML Content
5. Plain Text Content
6. Send Review Email
7. Approve

✓ Congratulations! This message is now ready to send to members of your target audience.

1. Message Approval
If your message was previously approved, you can mark this message as approved. This helps assure that your constituents will receive the message.

2. Send your Message
Click "Set Up Delivery" to configure delivery options and send the message.

or

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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.

Coaching Emails

Manage TeamRaisers

TeamRaiser List | Participants | Teams | Local Companies | Unconfirmed Gifts | Event Gifts | **Coaching Emails** | Event Managers

[Deliveries](#) > Select Email Audience

Process Navigator

1. Select Email Audience

*** 1. Email Audience:**

Determines which type of participants, donors, or group members will receive this email

- ☒ **Current Event Participants**
Participants who are registered for the current event.
- ☐ **Previous Event Participants**
Participants who were registered for the previous event.
- ☐ **Current Event Donors**
Donors who have given gifts to the current event.
- ☐ **Previous Event Donors**
Donors who gave gifts to the previous event.
- ☐ **Groups**
Predefined groups containing sets of constituents

Audience limited to TeamRaisers

[Next](#) or [Cancel](#)

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

Coaching Emails

Manage TeamRaisers

TeamRaiser List | Participants | Teams | Local Companies | Unconfirmed Gifts | Event Gifts | **Coaching Emails** | Event Managers

[Deliveries](#) > Select Participation Types

Process Navigator

1. Select Email Audience

2. Select Participation Types

3. Registration Filters

4. Team Filters

5. Review the Message

*** 1. Select Participation Types:**

Select the Participation Types that should receive this email.

All Selections

- Step Towards Recovery 2008/1 Mile Fun Run/Walk
- Step Towards Recovery 2008/5K Run
- Step Towards Recovery 2008/Virtual Walker

Your Selections

No Selection

Choose one or more participant types to target

[Add >>](#)
[Add All >>](#)
[<< Remove](#)
[<< Remove All](#)

[Next](#) or [Cancel](#)

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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

Process Navigator

1. Select Email Audience

2. Select Participation Types

3. Registration Filters

4. Team Filters

5. Review the Message

Related Actions

Schedule

Delivery Options

Calculate Audience

1. Review Details:

Review the delivery details below. Use the Process Navigator to make changes if needed. When you are happy next page and send the email to your selected recipients.

another coaching test message

Schedule

Immediately (no schedule is set)

Target Groups

The message was targeted for the following audience groups:

Group	Last Rebuild	Rebuild at Del
Step Towards Recovery 2008/5K Run	Group is not rebuildable	No
Step Towards Recovery 2008/1 Mile Fun Run/Walk	Group is not rebuildable	No
Step Towards Recovery 2008/Virtual Walker	Group is not rebuildable	No

Help me with Rebuild at Delivery settings

Do Not Mail Groups

Anyone found in these "Do Not Mail" groups will be excluded:

Group	Last Rebuild	Rebuild at Delivery
TeamRaiser Emails: Step Towards Recovery Opt Out	Group is not rebuildable	No

Help me with Rebuild at Delivery settings

Filters

The target audience was filtered as follows:

No filters selected

Delivery Options

These delivery options have been selected:

No options selected

2. Send it!

Send this email message to all members of the audience you have configured who have not already received this message are automatically excluded.

Send Immediately

Review target groups

Review do not mail groups

Click to send

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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

Reports Classic

Typical TeamRaiser Reports

- Participant Registration Report
- Participant Performance Report
- Event Check-In Report
- Transaction Report

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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	Event Check-in Report
<ul style="list-style-type: none"> ▶ 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 	<ul style="list-style-type: none"> ▶ Useful for tracking and recording final statistics ▶ Emergency contact information ▶ Team and participation information ▶ Fundraising information ▶ Responses to additional questions

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Report Writer

Reports

Reports Classic **Report Writer** Report Results

Reports

Create a New Report Manage Report Folders

Create and manage your own custom reports

The Reports list below will contain reports created on your site. Use the actions and links on this page to create new reports or work with existing ones. To view the results of a report that you have already run, click the Report Results tab.

- Reports -

Move Selected to: Please Choose an Option Move Filter by Product Type: TeamRaiser Go

Expand All Collapse All Records 1 - 8 of 8 First Previous Next Last

Custom Reports

- My Reports
- 2007 Performance Reports
 - Q1 2007 Performance
 - Q2 2007 Performance
 - Q3 2007 Performance

Name & Description	Actions	Category	Type	Last Activity
<input type="checkbox"/> Coaching Email Performance Report	Run Edit Copy Copy to My Reports Archive Unpublish from Event Manager	General	TeamRaiser	2008/09/26 13:29 by admin

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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.

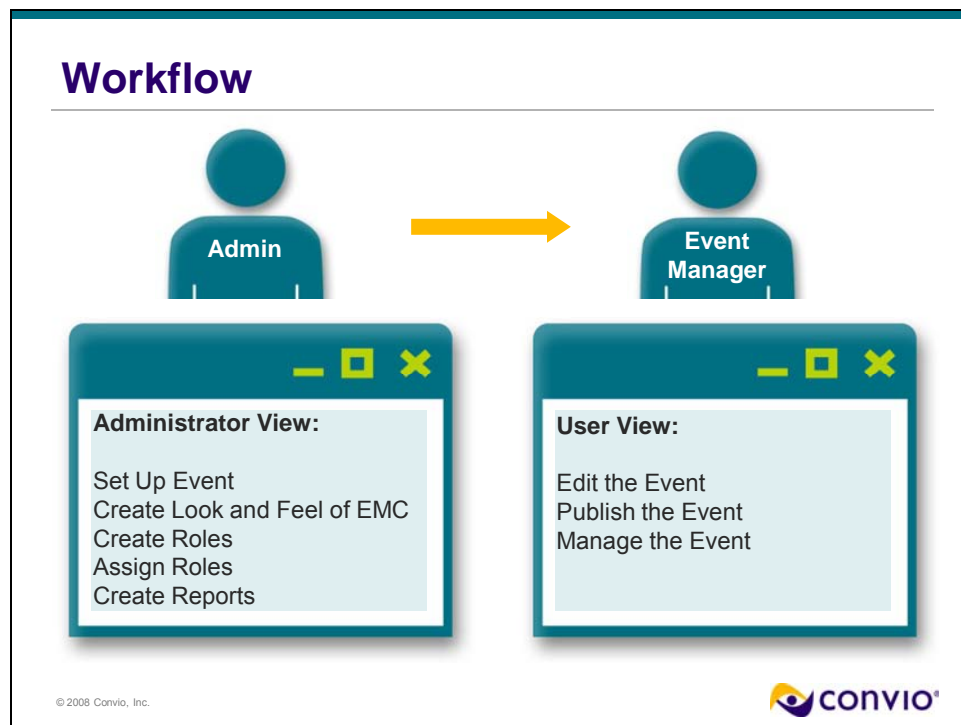
Objectives

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

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 it 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

The Event Manager Experience

A link to the Management Center will appear on the Greeting Page

Welcome, Alex
» Edit your personal profile
» Update your interests
» Log out

Step Towards Recovery 2008
Welcome Alex. [Manage this event](#)

Step Toward Recovery 5K Run/Walk brings the Central Texas...

Event Center
Event Center | Event Web Site | Event Emails | Customer Service | Reports

Welcome to Your Event Management Center

Event Status
Accepting Registrations and Gifts

If you have appropriate permissions, from this Event Center, you can access:

- Event Website to work with TeamRaiser Web pages (including the left-side navigation area)
- Event Emails to work with three types of email messaging for corresponding with others about this TeamRaiser
- Customer Service to register participants and manage their information as well as manage team, company, and gift information
- Reports to view and run reports about the participant fundraising activity
- Related Actions (listed to the left) to work with event information or Test Drive the configuration with simulated participant and donor information

Note: For assistance with these tasks, click the Help link above the top navigation bar.

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Clicking on the link at the top of the Greeting Page will take the user 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

Setting-up the Event

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

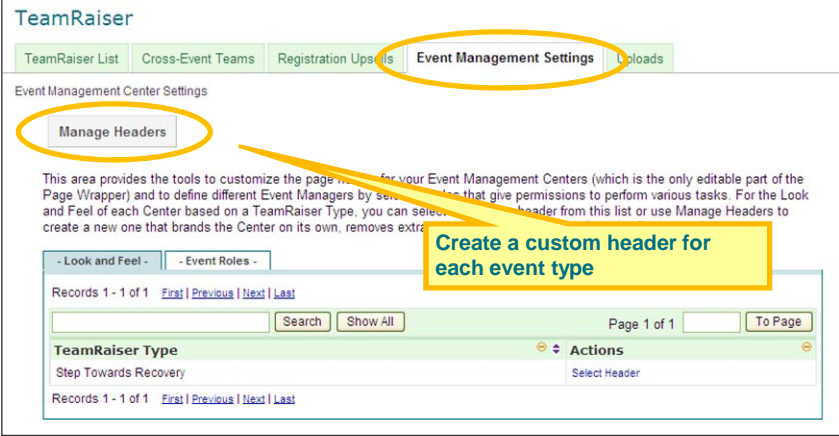
Most configuration options should have already been set up by the administrator

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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

Create Look and Feel



TeamRaiser

TeamRaiser List Cross-Event Teams Registration Updates **Event Management Settings** Uploads

Event Management Center Settings

Manage Headers

This area provides the tools to customize the page wrapper for your Event Management Centers (which is the only editable part of the Page Wrapper) and to define different Event Managers by selecting roles that give permissions to perform various tasks. For the Look and Feel of each Center based on a TeamRaiser Type, you can select a header from this list or use Manage Headers to create a new one that brands the Center on its own, removes extra


- Look and Feel - - Event Roles -

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

Search Show All Page 1 of 1 To Page

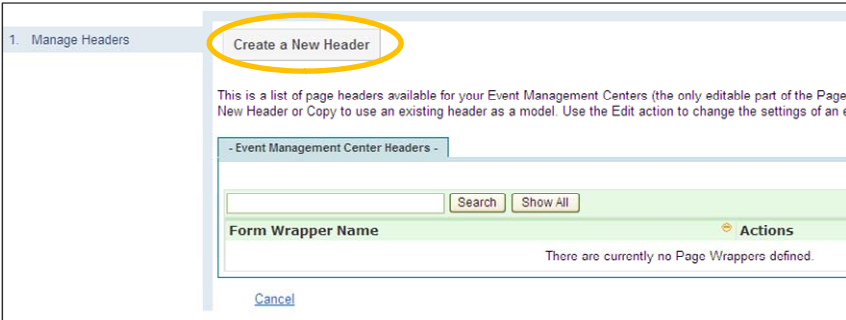
TeamRaiser Type	Actions
Step Towards Recovery	Select Header

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

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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.

Create a New Header



1. Manage Headers

Create a New Header

This is a list of page headers available for your Event Management Centers (the only editable part of the Page Wrapper). You can create a New Header or Copy to use an existing header as a model. Use the Edit action to change the settings of an existing header.

- Event Management Center Headers -


Search Show All

Form Wrapper Name

Actions

There are currently no Page Wrappers defined.

[Cancel](#)

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

Create a New Header

1. Manage Headers
a. Identify Header

1. TeamRaiser Wrapper Identification
Specify the wrapper name and meta-tag information. The meta-tag information in the "head" area of your web form in browsers. Instead, the meta tag information is used to communicate information that a visitor may engines or assistive technologies.

TeamRaiser Wrapper Identification

Wrapper Name: Step Towards Recovery Wrapper

TeamRaiser Meta Information

Title: Step Towards Recovery

Keywords: Your organization name, donation, support, giving, etc. For best results, use both upper and lower case versions of keywords.

Enter a description of the campaign using this wrapper.

2. Security Category
You can categorize this wrapper so that only certain administrators can select it.

General

Finish or Cancel

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

Editing the Header

- Event Management Center Headers -

Search Show All

Form Wrapper Name	Actions
Step Towards Recovery Wrapper	Edit Copy Delete

Click **Edit** to add styles, content, and preview 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

Event Management Center Settings > Manage Headers > Edit

1. Manage Headers

- a. Edit Appearance
- b. Add Content
- c. Preview Header

1. General Wrapper Layout:

Use this screen to set the general layout of the wrapper. You can set the width of the form area and of the sidebar here. If you choose wrapper will just consist of the header that you provide and the actual TeamRaiser page.

Page Alignment and Background

How should the page be aligned in the browser? Center Alignment

What colors should be used for the text and background? #808080

Sample Text

Next Save or Undo Changes or Cancel

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

Event Management Center Settings > Manage Headers > Edit

1. Manage Headers

- a. Edit Appearance
- b. Add Content
- c. Preview Header

1. Page Header Content:

Provide the banner graphics and any additional content that you would like to add to the page header portion of the T images, personalized content, and links. However, use links with care so you do not lead participants away from you information about the TeamRaiser then you should specify that the links open in a new window by including "target="

-- Personalization -- -- Conditionals -- -- Components -- -- Links --

-- Paragraph -- -- Style -- -- Font -- -- Size -- Normal Absolute Links

Preview: A banner image showing a person at a computer.

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**.

Previewing the Header

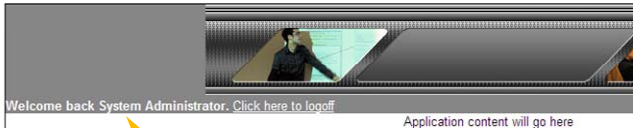
Event Management Center Settings > Manage Headers > Edit

1. Manage Headers

- a. Edit Appearance
- b. Add Content
- c. Preview Header

1. TeamRaiser Wrapper Preview:

This is an approximation of how the TeamRaiser wrapper will appear to your end users. Some pieces of the wrapper will appear in or not. The subsequent steps of this flow will allow you to change aspects of the wrapper.



Welcome back System Administrator. [Click here to logoff](#)

Application content will go here

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

Personalization automatically included

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

Selecting the Header

TeamRaiser

TeamRaiser List | Cross-Event Teams | Registration Upsells | **Event Management Settings** | Uploads

Event Management Center Settings

[Manage Headers](#)

This area provides the tools to customize the page header for your Event Management Centers (which is the only editable part of the Page Wrapper) and to define different Event Managers by selecting roles that give permissions to perform various tasks. For the Look and Feel of each Center based on a TeamRaiser Type, you can select an existing header from this list or use Manage Headers to create a new one that brands the Center on its own, removes extraneous links that lead away from the Center, and so on.

- Look and Feel - | - Event Roles -

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

Page 1 of 1

TeamRaiser Type	Actions
Step Towards Recovery	Select Header

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

Event Management Center Settings > Step Towards Recovery

1. Select Header

1. Event Management Center Header:

Defines the content in the top portion of the pages in the Event Management Center.

[Step Towards Recovery Wrapper](#) | [Step Towards Recovery Wrapper](#) | [Step Towards Recovery Wrapper](#)

[Finish](#) | [Save](#) | [Preview](#) | [Undo Changes](#) | [Cancel](#)

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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

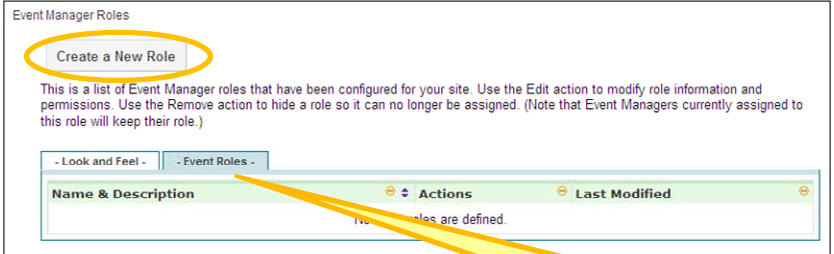
1. Click the **Edit** link in the **Actions** column next to your header
2. Set your desired alignment and text and background colors
3. Click **Next**
4. In the WYSIWYG, type your event name, highlight it, and select Heading 1 from the **Paragraph** drop-down menu
5. Click **Next**
6. Click **Finish**

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

Creating Roles



Event Manager Roles

Create a New Role

This is a list of Event Manager roles that have been configured for your site. Use the Edit action to modify role information and permissions. Use the Remove action to hide a role so it can no longer be assigned. (Note that Event Managers currently assigned to this role will keep their role.)

- Look and Feel - - Event Roles -

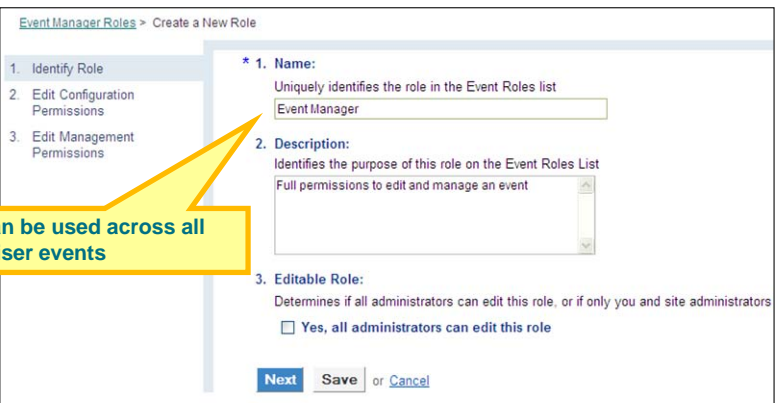
Name & Description	Actions	Last Modified
No roles are defined.		

Create as many roles as needed

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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.

Identifying the Role



Event Manager Roles > Create a New Role

1. Identify Role
2. Edit Configuration Permissions
3. Edit Management Permissions

* 1. Name:
Uniquely identifies the role in the Event Roles list
Event Manager

2. Description:
Identifies the purpose of this role on the Event Roles List
Full permissions to edit and manage an event

3. Editable Role:
Determines if all administrators can edit this role, or if only you and site administrators
☐ Yes, all administrators can edit this role

Next Save or Cancel

Roles can be used across all TeamRaiser events

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

Editing Configuration Permissions

Event Manager Roles > Event Manager

1. Identify Role
2. Edit Configuration Permissions
3. Edit Management Permissions

Event Configuration Permissions

Identifies the tasks that this Event Manager can perform if the appropriate content is available. Permissions below the primary one may only be available if the primary one is selected.

- For Event Information:
 - ☒ Edit event title and date
 - ☒ Edit fundraising goal
 - ☒ Edit Advanced Event, Fundraising, and Misc options
 - ☒ Customize event URL
- For Default Event Web Pages:
 - ☒ Edit event information and registration pages
 - ☒ Create and edit custom pages
 - ☒ Edit Navigation Bar links
 - ☒ Edit default Personal Page
 - ☒ Edit default Team Page
 - ☒ Edit default Company Page
- For Registration Information:
 - ☒ Create new Participation Types
 - ☒ Copy existing Participation Types
 - ☒ Delete existing Participation Types
 - ☒ Edit Participation Type names and descriptions (primary)
 - ☒ Edit participation fees
 - ☒ Edit Upsell selections
 - ☒ Edit Additional Questions
 - ☒ Edit participation waivers
- For Autoresponders:
 - ☒ Edit subject lines
 - ☒ Edit sender name and return email address
 - ☒ Edit stationery style
 - ☒ Edit message body content
- For Suggested Messages:
 - ☒ Create and edit suggested message templates

or

Determine which configuration permissions you would like to allow

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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.

Editing Management Permissions

Event Manager Roles > Event Manager

1. Identify Role
2. Edit Configuration Permissions
3. Edit Management Permissions

Event Management Permissions

Identifies management tasks that this Event Manager can perform

- Event Management:
 - ☒ Publish event and change event status
 - ☒ Delete registration
 - ☒ Register participants
 - ☒ Change team membership
 - ☒ Disable registration
 - ☒ Manage company information
 - ☒ Manage team information
 - ☒ Change participant passwords
 - ☒ Search for event contacts
 - ☒ Manage registrant responses
 - ☒ Manage global Email Opt-In status
 - ☒ Edit donor contact information
 - ☒ Edit participant pages
- Coaching Email Management:
 - ☒ Create Coaching Emails from templates
- Gift Management:
 - ☒ Enter offline gifts for this event
 - ☒ Record new company gifts
 - ☒ Confirm offline gift payments when they are received
 - ☒ Enter credit card gift payments
 - ☒ Change soft credit and edit the recognition name for a gift
 - ☒ Refund registration fees and gifts
- Report Management:
 - ☒ View and run reports
- Upload Management:
 - ☒ Add new offline registrants
 - ☒ Upload new offline gifts
 - ☒ Upload lists for emailing
 - ☒ Use Event Document and Image Library

or

Determine which management permissions you would like to allow

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

Event Roles

- Look and Feel -		
- Event Roles -		
Records 1 - 1 of 1 First Previous Next Last		
Name & Description	Actions	Last Modified
Event Manager Full permissions to edit and manage an event	Edit Remove	Feb 2, 2009 4:02:39 PM by System Administrator
Records 1 - 1 of 1 First Previous Next Last		

Role is now available to be assigned

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

Creating a New Event Manager

TeamRaiser Name	Action	Status
Step Toward Recovery 2008	Edit Copy Manage	Accepting Registrations and Gifts Published Date: February 02, 2009 Unpublished Date: N/A

Manage TeamRaisers

TeamRaiser List | Participants | Teams | Local Companies | Unconfirmed Gifts | Event Gifts | Coaching Email | **Event Managers** | Library

Step Toward Recovery 2008: Event Managers

[Create a New Event Manager](#)

This is a list of Event Managers that have been assigned to event... this TeamRaiser. You can direct Event Managers to their Event Center using the following URL.

http://bx101.convio.com/site/TREM?tr.emgmt=em_event_center&fr_id=1002

Create an Event Manager specifically for this event

Constituent Name	Actions	Role	Last Login
No Event Managers have been defined for this TeamRaiser.			

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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.

Selecting a Constituent

Step Toward Recovery 2008: Event Managers > Create a New Event Manager

1. Select Constituent

Related Actions
• Create a New Constituent Record

Select Constituent

Constituent Search
Defines search criteria to locate a constituent to assign to an Event Manager role

First Name: alex
Last Name:
Email:
Phone Number:
City:
State / Province:
ZIP / Postal Code:

Search

Search Results
Lists all constituents that match the search criteria and enables you to select the appropriate person

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

Name & ID	Actions	City/State/Zip	Email Address	Status
Alex Oliver 1001041	Select		bbradford-ao@convio.com	Active

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

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

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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.

Assigning a Role

Step Toward Recovery 2008: Event Managers > Event Manager: Alex Oliver

1. Select Constituent
2. Select Event Role

Assign Pre-Defined Event Role or Customize Permissions

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

Name & Description	Actions
Event Manager Full permissions to edit and manage an event	Customize Permissions Assign

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

[Cancel](#)

Assign the role to the constituent or customize the permissions if desired

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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.

Event Manager Created

Step Toward Recovery 2008: Event Managers

Create a New Event Manager

This is a list of Event Managers that have been assigned to event roles in this TeamRaiser. You can direct Event Managers to their Event Center using the following URL.


http://bvt101.convio.com/site/TREM?tr.emgmt=em_event_center&fr_id=1002

- Event Managers -

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

Constituent Name	Actions	Role	Last Login
Alex Oliver 1001041	Assign a different role Customize Permissions Remove Edit this contact	Event Manager	

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

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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

Making Reports Available to Event Managers

Reports

Reports Classic | **Report Writer** | Report Results

✓ Your report definition has been saved.

Create a New Report | Manage Report Folders

The Reports list below will contain reports created on your site. Use the actions and links on this page to create new reports or work with existing ones. To view the results of a report already run, click the Report Results tab.

Move Selected to: Please Choose an Option | Move

Filter by Product Type: All Products | Go

Expand All | Collapse All

Custom Reports

My Reports

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

Search | Show All


Page 1 of 1 | To Page

Name & Description	Actions	Category	Type	Last Activity
Registration Report	Run Edit Copy Copy to My Reports Publish to Event Manager Remove from Event Manager	General	TeamRaiser	2009/02/02 16:27 by convio

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

☐ Include archived reports in list

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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 you created earlier
4. Click the **Publish to Event Managers** link in the **Actions** column

The Event Center

Event Center

Step Toward Recovery
5K Fun Walk/Run

Welcome back Alex Oliver

Available actions depend on the permissions granted for this Event Manager

Event Center

Welcome to Your Event Management Center

Event Status
Accounting Registrations and Gifts

If you have appropriate permissions, from this Event Center, you can access:

- Event Website to work with TeamRaiser Web pages (including the left-side navigation area)
- Event Emails to work with three types of email messaging for corresponding with others about this TeamRaiser
- Customer Service to register participants and manage
- Reports to view and run reports about the participant
- Related Actions (listed to the left) to work with event

1. For Event Information:

- ☒ Edit event title and date
- ☒ Edit fundraising goal
- ☒ Edit Advanced Event, Fundraising, and Misc options
- ☒ Customize event URL

3. For Registration Information:

- ☒ Create new Participation Types
- ☒ Copy existing Participation Types
- ☐ Delete existing Participation Types
- ☒ Edit Participation Type names and descriptions (primary)
- ☒ Edit participation fees
- ☒ Edit Upsell selections
- ☒ Edit Additional Questions
- ☒ Edit participation waivers

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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

Event Website

Step Toward Recovery
5K Fun Walk/Run

Welcome back Alex Oliver. Click here to login.

Event Center Event Web Site Event Emails

Event Web Site

Create a Custom Page Copy a Custom Page Configure Navigation Bar

If you have the appropriate permissions, from this Web Site area, you can Edit content as well as create new custom pages for this event and add sections of links.

Note: For assistance with these tasks, click the Help link.

Choose a page to edit: --Select--

2. For Default Event Web Pages:

- ☒ Edit event information and registration pages
- ☒ Create and edit custom pages
- ☒ Edit Navigation Bar links
- ☒ Edit default Personal Page
- ☒ Edit default Team Page
- ☒ Edit default Company Page

--Select--

Event Information Pages

- Greeting
- Find a Participant
- Team List
- Company List
- Top Participants List

Event Registration Pages

- Team Selection
- Team Password
- Participation Options
- Registration Information
- Secondary Registration
- Waiver
- Registration Summary
- Billing Information
- Billing Confirmation
- Thank You

Participant Pages

- Home Page
- Default Personal Page
- Default Team Page
- Default Company Page

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

Editing Event Website

AN EVENING OF STARS

Home > An Evening of Stars

Be a Star

Welcome to the ALL STARS page for donors and friends in Georgia, South Carolina and Tennessee.

We believe everyone's a Star with Star Power: AEOS celebrities, fans, sponsors, volunteers, donors and YOU!

FORM AN ALL STARS TEAM

JOIN AN ALL STARS TEAM

REGISTER AS AN INDIVIDUAL

FIND AN ALL STAR OR ALL STARS TEAM

DONATE DIRECTLY

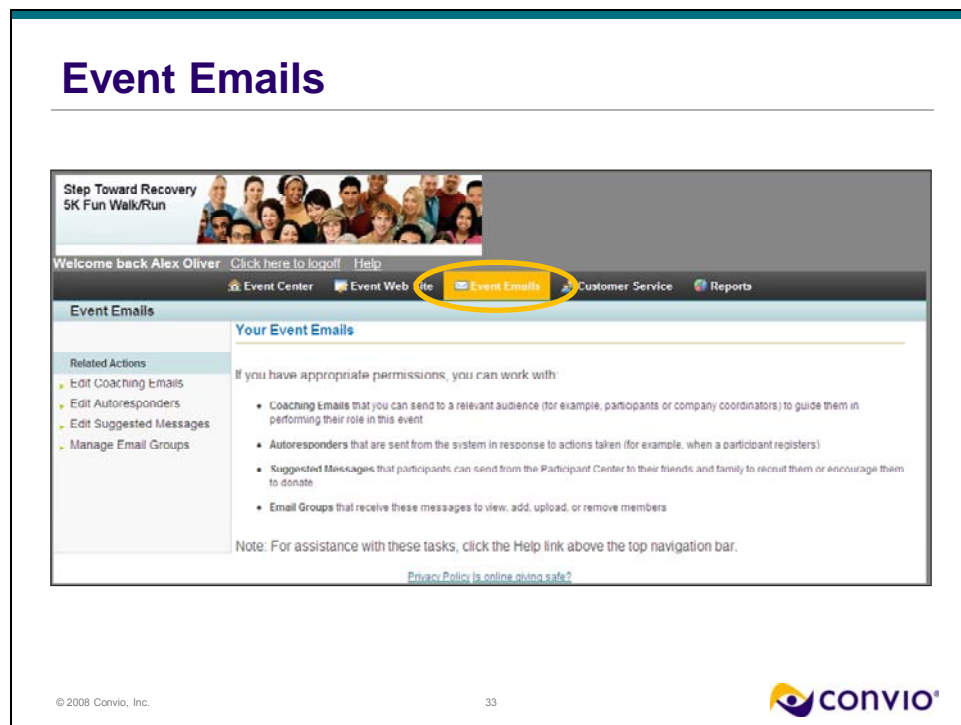
Change the content using the WYSIWYG editor

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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

Coaching Emails

Event Center

Event Web Site

Event Emails

Customer Service

Reports

Event Emails > Messages

✓ The message was returned to draft.

Choose an audience or schedule message delivery by clicking the "Begin Delivery" action. If a message is in Draft state, it will have to be approved before you can begin delivery.

Related Actions

Create a new message

Begin Message Delivery

Message List

Delivery List

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

Search

Show All

Page 1 of 1

To Page

Message	Actions	Status	Type	Tentative Schedule	Last Modified
Encouragement Email Email sent to encourage participants to keep up the good work (and to remind them to step it up if they have not been doing so)	Edit Copy Delete Archive Preview	Draft	Email Messages	No Tentative Schedule	09/25/2008 at 03:03 PM CDT by Frank Gentry

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

☐ Show Archived Coaching Email Messages


Determines if archived Coaching Email Messages are displayed in the list

Create and send messages

Edit existing email messages

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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.

Autorepsponders

Autoresponders

- Edit Autoresponders -

Autoreponder Types	Actions	Version to Send
Thank You for Forming a Team	Edit Preview	Send the Customized Version
Thank You for Registering	Edit Preview	Send the Customized Version
Someone has registered you	Edit Preview	Send the Customized Version
Sample Solicitation to Forward	Edit Preview	Send the Customized Version
Thank You for Your Gift	Edit Preview	Send the Customized Version
Offline Gift Thank You	Edit Preview	Send the Customized Version
Congratulations for Reaching 50% Goal	Edit Preview	Send the Customized Version
Congratulations for Reaching Your Goal	Edit Preview	Send the Customized Version
Someone Made a Donation on Your Behalf	Edit Preview	Send the Customized Version
Someone Joined Your Team	Edit Preview	Send the Customized Version
TeamRaiser First Follow Up		Do Not Send this Autoresponder
TeamRaiser Second Follow Up		Do Not Send this Autoresponder
TeamRaiser Third Follow Up		Do Not Send this Autoresponder
TeamRaiser Fourth Follow Up		Do Not Send this Autoresponder
TeamRaiser Fifth Follow Up		Do Not Send this Autoresponder
TeamRaiser Sixth Follow Up	Edit Preview	Send the Customized Version

Only edit the appropriate
autoresponders

Most of the content is already
in place - just add local
elements

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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

Suggested Messages

Event Center | Event Web Site | **Event Emails** | Customer Service | Reports

Event Emails > 2008 Star Power AEOS Campaign for Education - Atlanta

Related Actions

[Add a Message](#)

This is a list of Suggested Message templates that participants can send from their Participant Center to appeal for support, recruit teammates, personally thank donors, and so on. Providing templates with suggested content may make it easier for participants.

Note: Use the Add a Message link to create each new message template. Do not edit the Blank Message (which is used for a Tell-A-Friend message) subject or content unless you want the information inserted to be in all messages that access this template. ([Help](#))

Messages


Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#) Search Show All Page 1 of 1 To Page

Message Name	Actions	Type	Subject
Blank Message	Edit Delete	Other	
Support Me	Edit Delete	Solicit Gifts	Your support is crucial to their success!

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Additional messages can be added

Suggest messages for participants to send out to friends and family

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

Email Groups

Manage Email Groups

Related Actions

- Upload New List

Uploaded Email Groups

Name	Actions	Creation Date
2008 Star Power AEOS Campaign for Education - Atlanta Donors	Manage	September 9, 2008 11:05 AM
2008 Star Power AEOS Campaign for Education - Atlanta/ALL STAR	Manage	September 9, 2008 11:05 AM

1. Contact Information
Please fill out the form as completely as possible.

First Name: Last Name:

* Name:

* Email:

Finish or **Cancel**

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

Manage Email Groups

Related Actions

- Upload New List

Uploaded Email Groups

Name	Actions	Creation Date
2008 Star Power AEOS Campaign for Education - Atlanta Donors	Manage	September 9, 2008 11:05 AM

1. TeamRaiser Email List CSV File Format:
This example CSV file will help you learn about the data fields this page can accept.
[SampleEmailListUpload.csv](#)

2. TeamRaiser Email List File:
Use the browse button to find the TeamRaiser Email List file you want to upload. The "example" provides an example CSV file that describes the headers your file needs to have in order to be successfully uploaded.

Browse

Preview Preview the file you have selected.

Finish or **Cancel**

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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 Actions** 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

Customer Service

Step Toward Recovery 5K Fun Walk/Run

Welcome back Alex Oliver [Click here to logoff](#) [Help](#)

Event Center Event Web Site Event Email **Customer Service** Reports

Customer Service

Your Customer Service

If you have the appropriate permissions, from this Customer Service area, you can work with:

- Participants registered for this event to view and update their contact, registration, and gift information as well as register new participants
- Teams of participants to view and update their detail, gift, and member information as well as enter new gifts received for them
- Companies who sponsor teams for this event to view and edit their detail, coordinator, and gift information as well as add new companies
- Gifts given directly in support of the event
- Unconfirmed Gift List to confirm cash, check, and offline credit card payments when received or reject gifts to remove them from the list
- Upload files to add new participant registration, answers to additional registration questions, and gifts to the online database in bulk

Note: For assistance with these tasks, click the Help link above the top navigation bar.

[Privacy Policy is online giving safe?](#)

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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.

Manage Participants

Customer Service > Manage Participants > View

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

Related Actions

- Record Donation
- Edit Registration
- Edit Constituent
- Make Inactive
- Make Private
- Create New Team
- Change Team
- Reset Password

Participant information snapshot

Name: Mrs. Kathy K Bedoya
 Email: devnull+1000298@convio.com
 Username: kathyb
 Participation Type: 5K Run
 Race Number: 604
 Registration Type: Online
 Fundraising Goal: \$300.00
 Registration Status: **Active**
 Personal Page: **Public**
 Team Name: Convio
 Team Rank: captain

Several Related Actions

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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

Gift History

Records 1 - 6 of 6 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Page 1 of 1

Name	Action	Gift Type	Donation Type	Gift Date	Amount
Kathy Bedoya	View/Edit Refund	Online (Credit Card)	Gift	12/14/2001	\$140.00
Molly Bresnen	View/Edit Change Soft Credit	Offline Confirmed (Cash)	Gift	12/14/2001	\$40.00
Sean Gentry	View/Edit Change Soft Credit	Offline Confirmed (Cash)	Gift	09/26/2008	\$2,000.00
Miriam Green	View/Edit Change Soft Credit	Offline Confirmed (Cash)	Gift	10/25/2007	\$25.00
Amy Mecozzi	View/Edit Change Soft Credit	Offline Confirmed (Cash)	Gift	12/14/2001	\$30.00
Beth Pearson	View/Edit Change Soft Credit	Offline Rejected (Cash)	Gift	12/14/2001	\$70.00

Records 1 - 6 of 6 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Edit gift information, including refunds

Change which participant receives credit for the donation

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

Manage Teams

Teams

Records 1 - 20 of 21 [First](#) | [Previous](#) | [Next](#) | [Last](#)

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Name	Action	Team Captain	Company	Team Goal
AIX Development	Manage	Gill Dantell devnull+gill@convio.com	IBM	\$1,000.00
Austin Caretakers	Manage	Andrew Johnson devnull+1000953@convio.com		\$1,000.00
Austin Caretakers2	Manage	Anthony Burnett devnull+1000958@convio.com		\$5,000.00
Badgers	Manage	Kendall Collett devnull+1000273@convio.com		\$10,000.00
Convio	Manage	Kathy Bedoya devnull+1000953@convio.com		\$4,000.00
Convio Services	Manage	Donna V devnull+1000953@convio.com		\$10,000.00
Corey's Team	Manage	Corey Bradford		\$1,000.00

Manage team information from this list

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

Edit Team Information

1. Team Name:
Identifies the team
Convio

2. Team Goal:
Team Goal:
\$4,000.00

3. Team Company:
Identifies the company that sponsors this team
☒ Choose an existing value
☐ Enter a new company

4. Division:
Identifies the Division under which the team is competing
Corporate

Finish or **Cancel**

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

Manage Companies

- Local Companies -

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Search **Show All** Page 1 of 1 **To Page**

Name	Action
Convio	View Summary Edit Company Edit Primary Contact Edit Gifts Delete Company
Safeway	View Summary Edit Company Edit Primary Contact Edit Gifts Delete Company

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

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Event Managers may also have access to manage companies.

Manage Unconfirmed Gifts

Unconfirmed Gifts				
Records 1 - 4 of 4 First Previous Next Last				
<input type="text"/>		<input type="button" value="Search"/>	<input type="button" value="Show All"/>	Page 1 of 1 <input type="button" value="To Page"/>
Participant	Action	Donor	Team Name	Amount
Phillip Capps	Confirm Reject	Amy Mecozzi	Convio	\$100.00
Rich Levy	Confirm Reject			\$100.00
Jeff Mills	Confirm Reject	Ben		\$40.00
Alex Oliver	Confirm Reject	Jerry Casper	Convio	\$25.00
Records 1 - 4 of 4 First Previous Next Last				

Confirm offline gifts when received, or reject if never received

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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.

Reports

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

Page 1 of 1

Name & Description	Actions	Category	Type	Last Activity
Coaching Email Performance Report	Run	General	TeamRaiser	2008/09/26 13:29 by admin
Gift Details	Run	General	TeamRaiser	2008/09/26 13:31 by admin
Gift Summary By Participant	Run	General	TeamRaiser	2008/09/26 13:33 by admin
Performance by Event	Run	General	TeamRaiser	2008/09/26 13:28 by admin
Registrations	Run	General	TeamRaiser	2008/09/26 13:34 by admin

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

Reports have been configured by the admin

Just click *Run* and view the most current results

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 address
 - 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

