EXERCISE 3.1: Creating the Look and Feel

Create a New Header

1. From the main TeamRaiser page, select the ***Event Management Settings*** tab
2. Click the ***Manage Headers*** button
3. Click the ***Create a New Header*** button
4. Name the wrapper (***`Your event's`*** `Wrapper`)
5. 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***

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

EXERCISE 3.3: Publishing Reports to Event Managers

Publish a Report

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

EXERCISE 3.4: Configuring the Event

Change the Suggested Participant Fundraising Goal

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

Create a Custom Page

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

Create a New Suggested Message

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

EXERCISE 3.5: Managing the Event

Register a New Participant as an Individual

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

Participant Name: ____________________________________

Participant Email: ____________________________________

Create a New Team with this Individual as the Captain

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

Find a Gift

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

Run a Report

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